



Awareness

Usage

Satisfaction

ICF Global Consumer Awareness Study
Executive Summary

December 2010

Overview

This is a summary of the key findings from the 2010 *ICF Global Consumer Awareness Study*. The study was commissioned by the International Coach Federation (ICF) and undertaken by PwC's International Survey Unit (ISU) and their alliance online panel provider Research Now in May and June 2010.

The study utilized a series of online panels of general consumers who were representative of the specific country population. Online panels are increasingly viewed as a reliable and cost effective way of tapping into the views and opinions of citizens. They are an essential part of the toolkit of modern global research methods.

In recent years, panel recruitment techniques have been enhanced so that they can build upon the scalability and efficiency of the traditional omnibus survey. The "omnitaxi" approach offers a more flexible alternative to the traditional omnibus; as it can be delivered to who you want, when you want, and where you want. In other words, this survey distribution process was not shared with any other clients.

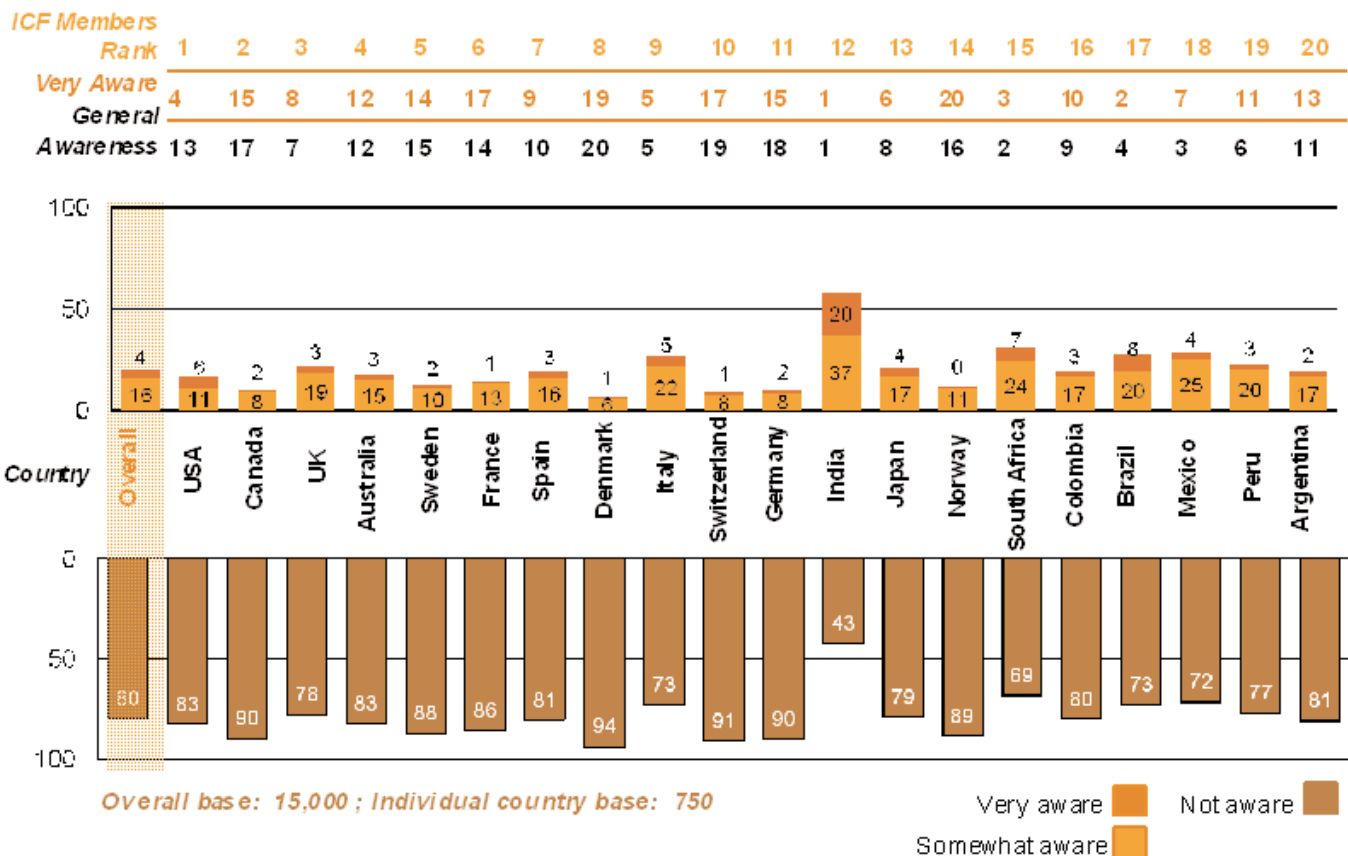
The study presents a picture of global consumer awareness of the coaching profession and the ICF for the ICF's Top 20 countries as determined by the ICF Members Rank league table. These countries represent approximately 90 percent of the ICF's critical mass of known membership clusters. In total, 15,000 responses were achieved, 750 from each country, and all respondents were aged 25 or older.

How aware are people of coaching and the ICF?

The results of the study show that more than half (51 percent) of all respondents are generally aware of coaching. This included those who indicated that they are either "very aware" (12 percent) or are "somewhat aware" (39 percent) of coaching.

Interestingly, one in five of all respondents (20 percent) are generally aware of the ICF. This includes 4 percent who are "very aware" and 16 percent who are "somewhat aware" of the ICF. The general awareness of the ICF ranges from a high of 58 percent in India to a low of 7 percent in Denmark.

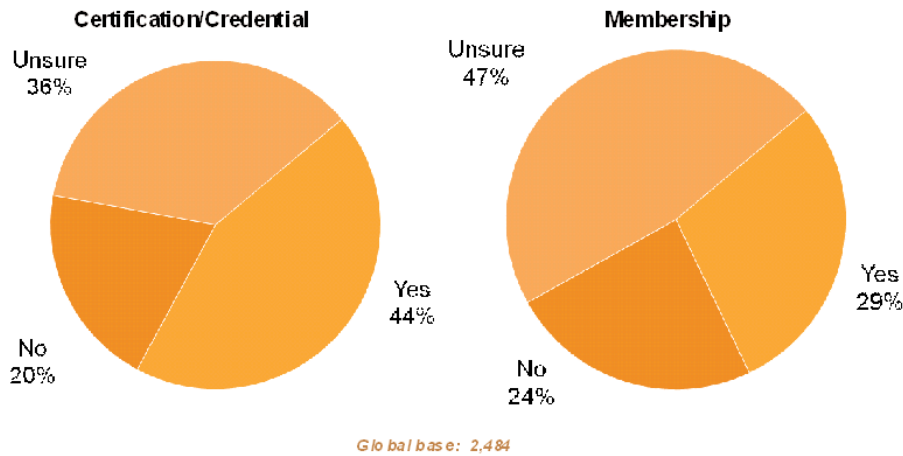
Awareness of the ICF



How important are certifications/credentials?

Overall there is agreement over the importance of certification/credentials regardless of experience of the industry, although there is some regional variation. Latin America is the region which places the highest emphasis on the importance of a coaching credential, with 91 percent of respondents rating this measure either “important” or “very important.” Whether respondents are unaware of coaching (77 percent, “important” or “very important”) or have participated in a coaching relationship (84 percent, “important” or “very important”), they agree on the importance of certification/credentials. These facts seem to validate the findings from the 2007 ICF Global Coaching Study; where 52 percent of coaches agreed that “The people we coach increasingly expect us to be credentialed”.

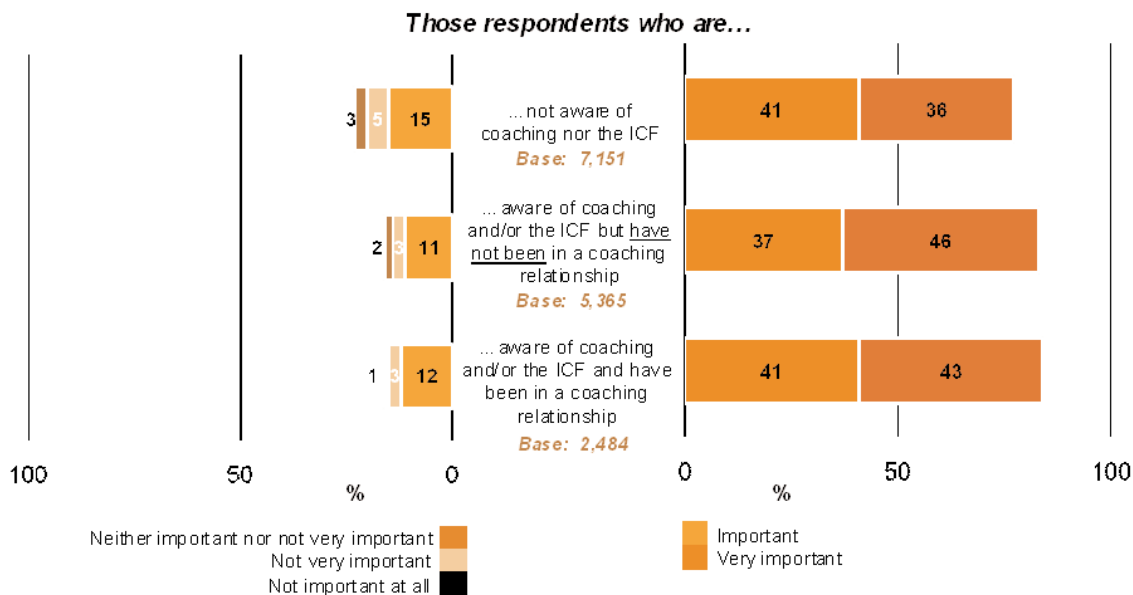
Are you aware of your coaches’ certification/credential and/or membership?



More than two in five respondents (44 percent) knew if their coach had a certification/credential. On a regional basis, this awareness ranged from a high of 52 percent (Asia Pacific) to a low of 42 percent (EMEA). Further, more than one in four (29 percent) knew if their coach was a member of a professional organization. Regionally, this awareness of organizational affiliation varied from a high of 35 percent (Asia Pacific) to a low of 25 percent (Latin America).

Notably, over one third (36 percent) of respondents were “unsure” if their coach had a certification/credential and nearly half (47 percent) were “unsure” if their coach was a member of a professional organization. Furthermore, of those who were aware that their coach had a certification/credential or that they were a member of a professional organization, more than 32 percent were unsure of the type of certification/credential and 29 percent were unsure of the type of membership. The high level of agreement over the importance of coaches having certifications/credentials presents an opportunity for those coaches with certifications/credentials and/or professional membership to differentiate themselves by communicating this to the people they coach.

Importance of certification/credentials - it’s very important!



How satisfied are those who have been coached?

Satisfaction levels are very high (83 percent) among those in the general public who have been involved in a coaching relationship, 36 percent of which were “very satisfied.” The level of satisfaction rises even higher to 92 percent among those with an ICF Credentialed coach, 55 percent of which are “very satisfied.”

Of the four separate age groups analyzed in this study, the youngest segment (aged 25-34) had the higher rate of awareness of coaching (57 percent), higher awareness of the ICF (26 percent) and higher levels of satisfaction with their coaching experience (85 percent).

How likely are people to recommend coaching?

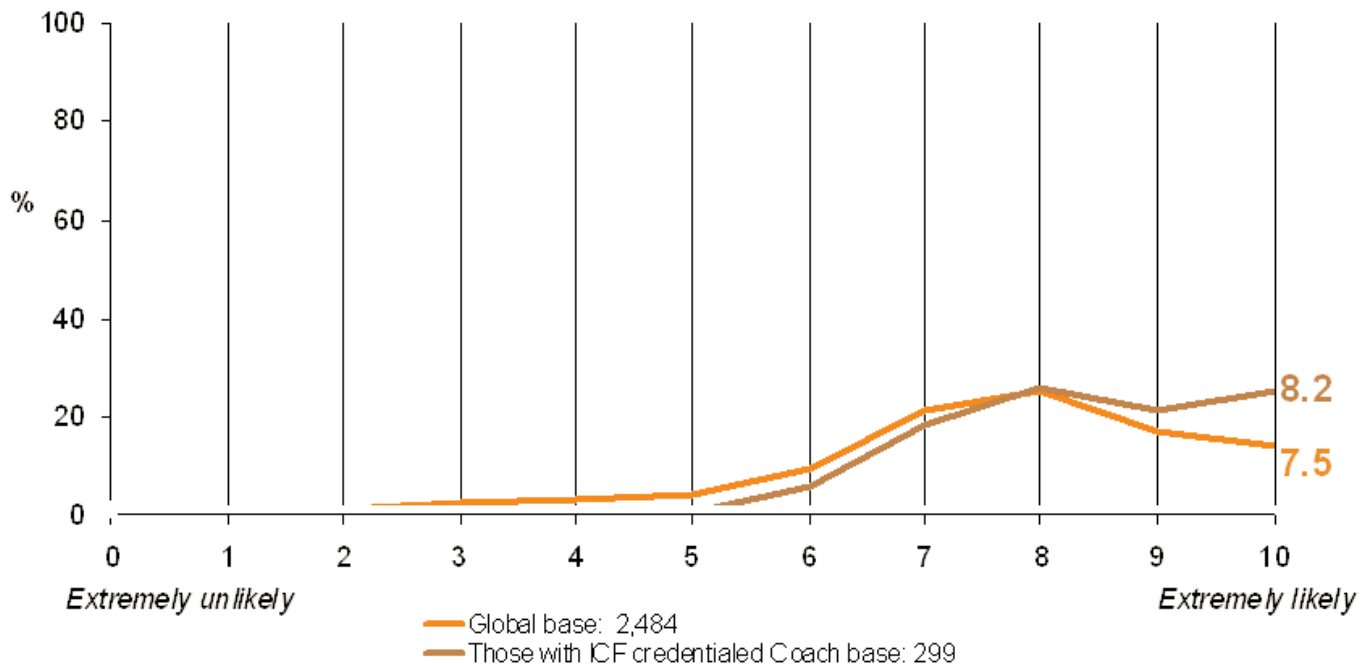
As a whole, those who have been coached gave a mean advocacy score of 7.5 (out of 10) in terms of their likeliness to recommend coaching. Overall, 31 percent of those coached indicated that they were “extremely likely” to recommend (gave a score of 9 or 10). This level of advocacy was higher again for those who had an ICF Credentialed coach (mean advocacy score of 8.2 out of 10). In fact, 45 percent of those who had a coach with an ICF Credential were “extremely likely” to recommend (gave a score of 9 or 10) coaching.

Why are people involved in a coaching relationship?

“Optimizing individual-team work performance” was selected by 43 percent of participants. Some regions were higher/lower than this global average—Latin America (52 percent) and EMEA (38 percent). Those in North America (50 percent) are most likely to select “increase self esteem/self confidence.” Asia Pacific participants (50 percent) are most likely to select “expand professional career opportunities.”

Likelihood to recommend - the advocates for coaching

Advocacy is high, with a global mean score of 7.5. Advocacy is even higher among those whose coach had an ICF Credential, with a mean of 8.2.



What is the opportunity for new clients?

There appears to be an untapped reservoir of potential coaching clients. When probed, nearly half (49 percent) of all respondents who indicated there were not aware of coaching, did in fact have an understanding of professional coaching.

Among the respondents who are “unaware” of either the coaching profession or the ICF (48 percent), one third of all respondents (33 percent) indicated they would consider participating in a coaching relationship in the future.

Looking forward...

In general, people who have been in a coaching relationship are satisfied with their experience and are advocates of coaching. But there are opportunities for the coaching profession as a whole...

given the amount of uncertainty as to a coaches certifications/credentials and/or membership, coaches should ensure their clients are informed about the certifications/credentials they hold and the professional organizations they are members of. This is especially necessary given the high levels of agreement that coaches should hold certifications/credentials. It is also important to note that with the high advocacy levels, coaching clients will continue to be an important “word of mouth” marketing tool for each individual coach and the profession as a whole.

while 51% of people are generally aware of coaching and 20 percent are generally aware of the ICF, if awareness levels of both were to be improved coaches could benefit from the interest in coaching of the ‘untapped reservoir’ with 33 percent indicating they would consider participating in a coaching relationship.

the youngest age segment analyzed in this study (aged 25-34) have the highest rate of awareness of coaching (57 percent), highest awareness of the ICF (26 percent) and highest levels of satisfaction with their coaching experience (85 percent), this indicates there are real opportunities for the coaching industry to further develop this 25 to 34 year old age segment.

Would you ever consider coaching? The untapped reservoir

For respondents who are **unaware** of the coaching profession and the ICF:

