

ICF Global Coaching Study

2025 Executive Summary





Executive Summary

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NOTE: The figures presented in this report are based on survey responses and therefore rely on the accuracy of the data provided by the survey respondents.

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ICF International
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Introduction

The International Coaching Federation (ICF) is proud to present the 2025 ICF Global Coaching Study—the sixth major research project exploring the size and scope of the coaching profession worldwide. Since the first study in 2007, with follow-ups in 2012, 2016, 2020 and 2023, these reports have provided valuable insights into how coaching continues to evolve and grow.

This latest study takes a close look at the work of coach practitioners and the business of coaching. It explores key indicators such as annual revenue, fees for one-hour coaching sessions, number of active clients, and the time coaches dedicate each week to their practice.

At the heart of the study is the role of the coach practitioner— Someone who provides an ongoing partnership designed to help clients produce fulfilling results in their personal and professional lives. The coach's job is to provide support to enhance the skills, resources, and creativity that the client already has.

Methodology

The study employed a comprehensive quantitative online survey over nearly eight weeks, from February 28 to April 23, 2025, aiming for global participation from coach practitioners and managers/leaders using coaching skills.

Survey Responses

Once again, this study attracted interest from a substantial number of coaches with 10,035 providing valid responses. To qualify as valid, respondents had to:

- identify as either coach practitioners or managers/leaders using coaching skills, with this criterion validated at the survey's outset.
- complete the entire questionnaire or at least its first section, and provide key demographic information, including their membership status in professional coaching organizations, crucial for estimating global coach numbers.

Of these valid responses, a substantial 89% (8,916) came from coach practitioners, while 11% (1,119) were from managers/leaders using coaching skills. ICF members accounted for 8,068 responses, representing 80% of the total.



Structure of the Final Report

The final report is structured as follows:

Section 1 Framing the Study.

This section introduces the purpose of the 2025 ICF Global Coaching Study and explains its value as the most comprehensive resource on the size and scope of the coaching profession. It sets the stage for understanding how the study was designed and what it aims to uncover.

Section 2 The Global Coaching Landscape.

An overview of the profession at large—its global reach, economic impact, and the forces shaping revenue and growth. This section highlights the big-picture view of how coaching contributes to individuals, organizations, and economies worldwide.

Section 3 In-Depth Insights.

A closer look at the people and practices behind coaching, from demographics and client demand to evolving specialties and business markers. These findings provide a detailed portrait of today's coaching profession.

Section 4 Advice for Aspiring Coaches.

Practical wisdom gathered directly from experienced coaches, offering inspiration and guidance for those considering or beginning their coaching journey.

Section 5 Appendices and Methodology.

Supporting details that explain how the study was conducted, including survey design, key terms, and approaches to data analysis. This section ensures transparency and credibility behind the findings.



Key Findings at a Glance

Economic Contributions

Revenue Contributions

- The coaching profession contributed an estimated \$5.340 billion USD in total annual revenue to the global economy over the past year, an increase of 17% over the 2023 study.
- Globally, individual active coach practitioners earn an average annual revenue of \$49,283 USD from their coaching activities.

Employment Contributions

- The estimated total number of coach practitioners globally has increased 13% from 2023 to the current record high of 122,974.
- The coaching profession maintains high participation levels with 90% having active clients, contributing to a total number of 110,492 active coach practitioners.



Revenue Drivers

Global highlights of three key revenue drivers affecting total annual revenue contribution and average annual individual coach revenue from coaching activities include:

Coaching Impact Factors

- Active coach practitioners charge an average fee of \$234 USD for a one-hour coaching session.
- They spend an average of 11.6 hours per week working as a coach.
- They work with an average of 12.4 active coaching clients.

Future Revenue Growth

Coaching Outlook Positive

- Globally, there is strong optimism among coaches, with 59% expecting an increase in their annual revenue for the upcoming year.

Growth Expectations Rising

- Coaches anticipate that the expected rise in annual revenue will primarily stem from an increase in the number of clients (60%) and coaching sessions (51%), rather than higher hourly fees where only 37% anticipate an increase.

Growth of New Technology in Coaching

New technology is an emerging and important growth strategy for coaches offering improved ways to reach clients and to drive work efficiencies. This is reflected in the 54% of coaches who say that improved coaching platforms and technology-driven solutions are a priority to meet the demands of future coaching clients. However, adoption across the coaching industry remains low, particularly in the following areas:

Digital Platform Usage

- While 47% of coaches are now using digital coaching platforms, their primary use is for one-on-one virtual coaching sessions (35%) and scheduling and client management (23%).

Adapting to Technology

- In the past year, only 19% of coaches invested in new technology with this set to increase to 27% over the next one to three years.
- Over one third (37%) of coaches indicated that adapting to technology and digital tools is a major concern.

Optimism for the Emerging Regions

Annual Revenue: Growth optimism for annual revenue is highest in the Middle East and Africa (71%), followed by Latin America and the Caribbean (66%), Eastern Europe (63%), and Asia (59%). North America stands at 58%, while Western Europe (54%) and Oceania (55%) are lowest.

Number of Clients: The Middle East and Africa lead the coaching client outlook, with 72% expecting client growth. Latin America and the Caribbean follow at 65%, Asia at 63%, and Eastern Europe at 62%—all above the global average of 60%. In contrast, established regions for coaching fall below the average, with North America and Oceania at 60% and Western Europe lowest at 55%

Fee per One Hour Coaching Session: Eastern Europe shows the strongest optimism, with 48% of coaches expecting higher fees per one-hour coaching session. The Middle East and Africa follow at 44%, Latin America and the Caribbean at 43%, and Asia at 39%. Established markets again fall below the global average (37%), with Oceania at 36%, North America at 35%, and Western Europe at 34%.

Number of Coaching Sessions: The Middle East and Africa lead expectations for increased coaching sessions at 62%. Asia and Eastern Europe follow at 57% each, and Latin America and the Caribbean at 54%—all above the global average of 51%. Established regions anticipate slightly smaller increases, with North America at 50%, Oceania at 48%, and Western Europe at 46%.

Impact of Generation and Experience

A strong majority of Baby Boomers (84%) and Gen X coaches (69%) have more than five years of experience, compared with just 48% of Millennials. This difference in experience directly influences revenue, fees, clients, and coaching hours:

- **Revenue and fees rise with experience.** Coaches with over ten years of experience average \$69,721 USD annually, with higher hourly fees, more clients, and greater weekly coaching hours. By generation, Baby Boomers average \$60,323 USD annually compared with \$33,553 USD for Millennials, and charge \$270 USD per hour versus \$193 USD.
- **Business coaching specialization increases with experience.** Among coaches with at least ten years in the profession, 80% focus on business coaching compared to 48% of those with less than one year. Similarly, 87% of Baby Boomers specialize in business coaching versus 73% of Millennials.
- **Client profiles shift with experience.** Newer coaches are less likely to work with Executives and Managers—only 18% and 10% respectively for those with under one year of experience. In contrast, among coaches with over ten years experience, 38% primarily serve Executives and nearly 30% serve Managers. This demonstrates how client demographics evolve as coaches advance in their careers.





About ICF

Driving Coaching Forward for 30 Years

Founded in 1995, the International Coaching Federation (ICF) is a non-profit organization dedicated to advancing the coaching profession by setting high ethical professional standards, acting as an independent accreditation and certification body for training programs and coaches, and building a worldwide network of credentialed coaches.

ICF is a global organization, with a membership comprising more than 62,000 trained personal and business coaches located in over 150 countries. There are ICF Chapters in more than 80 countries.

ICF defines coaching as partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.

For more information on ICF: coachingfederation.org

About PwC Research

PwC Research is the firm's global center of excellence for bespoke research and insight, working with clients to help them build world-class insight capabilities and solve their business challenges.

Our agile real-time insight and analytics and unique advisory frameworks help businesses achieve sustained outcomes as they transform in the digital age.

For nearly 30 years we have been trusted to undertake some of the most prestigious and thought-provoking research in the UK, Europe, the Americas and Asia Pacific. We deliver impactful and visual insight for global clients ranging from Fortune 500 companies to national governments, informing strategy, driving performance improvement and supporting change.

With the unique ability to connect with subject-matter experts across the PwC global network, we can integrate and embed global citizen, customer, market and employee insight at the right time within an organization's decision making.



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