

# **EXECUTIVE, LEADERSHIP & BUSINESS COACHING LANDSCAPE.**

*Structural Projection — United States — Q1 2026*

|                   |                                |
|-------------------|--------------------------------|
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# Executive Summary.

## EXECUTIVE SUMMARY

The U.S. executive, leadership, and business coaching industry is undergoing a structural contraction that most practitioners have felt but few have been able to name. Global coaching revenue reached \$5.34B in 2025, up 17% from 2023 — but U.S. business coaching revenue declined 0.3% annually between 2019 and 2024, while the number of coaching businesses grew 5.4% annually. Four causal chains are converging simultaneously: demand collapse, client psychology shift, supply glut, and relevance gap. The 90-day decision window for repositioning closes by end of Q2 2026 for coaches who depend on corporate clients.

## Confidence Summary

| DIMENSION             | ASSESSMENT  |
|-----------------------|---|
| <b>Projection</b>     | Structural consolidation accelerates through Q3 2026. Approximately 30-40% of full-time coaches with 5+ years experience will see revenue decline exceeding 25% by end of 2026 unless repositioned.   |
| <b>Consensus view</b> | Industry associations project continued growth. ICF reports 73% of coaches expected income increases in 2023, declining to 59% in 2025. Most public-facing industry commentary remains optimistic.  |
| <b>Our estimate</b>   | The consensus is tracking aggregate revenue, which includes AI coaching platform revenue and corporate leadership development budgets that do not flow to independent practitioners. Independent coach revenue per practitioner is declining. The consolidation is underway, and the 90-day decision window for repositioning closes by end of Q2 2026 for coaches who depend on corporate clients. |

## Chain 1: The Demand Collapse.

### ● Active — Confirmed

Corporate clients are the primary buyers of executive and leadership coaching in the United States. Those clients have been in sustained cost-reduction mode since mid-2023, and the data confirms that this is not a temporary budget pause.

#### **Link 1: Corporate budget freezes and restructuring** (Active — Confirmed)

U.S. employers announced 1,206,374 job cuts in 2025, up 58% from 761,358 in 2024, the highest annual total since 2020 (Challenger, Gray & Christmas, December 2025). January 2026 brought 108,435 additional cuts, up 118% year-over-year and the highest January figure since 2009. Technology led private-sector cuts with 154,445 in 2025, up 15% from 2024. Warehousing (up 317%), retail (up 123%), and services (up 68%) followed.

Hiring announcements fell to 507,647 in 2025, down 34% from 2024 and the lowest total since 2010. January 2026 hiring announcements (5,306) were the lowest for any January since Challenger began tracking.

These are the companies that buy coaching. When they are cutting headcount at this scale, external development spending is among the first discretionary line items reduced.

#### **Link 2: L&D spending contraction** (Active — Confirmed)

Average per-employee learning spend dropped from \$1,283 in 2023 to \$1,254 in 2024 (ATD State of the Industry, 2025). More telling: average formal learning hours per employee fell from 17.4 in 2023 to 13.7 in 2024, a 21% decline in a single year. This follows a longer trajectory of decline from 35 hours per employee in 2020.

Large companies reduced average training expenditures from \$13.3 million to \$11.7 million (Training Magazine Industry Report, 2025). Coaching and mentoring purchasing intent remained flat at 28% of anticipated purchases, showing no growth momentum.

#### **Link 3: Coaching budget cuts and engagement shortening** (Active — Emerging)

Directional evidence suggests that coaching engagements are shortening and per-coach revenue from corporate clients is declining. Coaches report that revenue expectations are coming from "more clients and more coaching sessions, and not higher fees" (ICF Global Coaching Study, 2025). Among coaches with 10+ years experience, only 48% expect revenue growth, and close to 20% anticipate decline.

The shift from 6-month and 12-month engagements to 3-month "sprint" formats is reported anecdotally across multiple coaching communities but lacks a single authoritative data source. This is a data gap.

**Link 4: Coach revenue decline** (Active — Confirmed at aggregate level)

U.S. business coaching revenue declined 0.3% annually between 2019 and 2024 while the number of businesses grew 5.4% annually (IBISWorld, 2024). More than half of all coaches globally (53%) report earning less than \$30,000 from coaching (ICF, 2025). First-year coaches average \$14,484; coaches with 10+ years average \$69,721. The income distribution is not a gradient. It is a cliff.

**Threshold Indicators**

| INDICATOR                       | STABILIZATION SIGNAL                        | ACCELERATION SIGNAL                                  |
|---------------------------------|---|--|
| Challenger monthly cuts         | Below 50,000/month for 3 consecutive months | Above 100,000/month for 2+ months (currently active) |
| ATD per-employee learning spend | Returns above \$1,300                       | Falls below \$1,200                                  |
| ICF coach revenue confidence    | Rises above 65% expecting growth            | Falls below 50% expecting growth (approaching)       |
| Corporate hiring announcements  | Above 60,000/month                          | Below 30,000/month (currently active)                |

## Chain 2: The Client Psychology Shift.

### ● Active — Emerging

The clients who remain in coaching are not the same clients who entered coaching 18 months ago. Their psychological state has shifted, and the coaching modality that built most established practices is mismatched to what these clients now need.

#### **Link 1: Sustained professional uncertainty** (Active — Confirmed)

LinkedIn's Workforce Confidence Index shows declining professional sentiment heading into 2026. Hiring remains more than 20% below pre-pandemic levels (LinkedIn Labor Market Report, 2025). Professionals are navigating layoff waves, organizational restructuring, and AI-driven role uncertainty simultaneously. This is not a temporary dip in confidence. It is a sustained state of contracted psychological functioning.

#### **Link 2: Shift from expansive to contracted client needs** (Active — Emerging)

When professionals are in a contracted psychological state, their tolerance for exploratory, open-ended coaching decreases. The question shifts from "What do I want my life to look like?" to "How do I protect what I have?" and "What specific actions produce results in the next 90 days?"

Directional evidence: ATD reports that 90% of organizations face a major or minor leadership skills gap (ATD, 2024), but organizations are responding by investing in AI training (55% now offer it, up from 46% the prior year) rather than traditional coaching. The investment is moving toward measurable, skill-specific development and away from identity-level exploration.

#### **Link 3: Modality mismatch between coach offering and client need** (Active — Emerging)

Most established coaching practices were built during a period of organizational stability and growth (2012–2022). The dominant modalities emphasize purpose, identity, vision, and expanded possibility. These frameworks were effective when clients had stable employment, clear career trajectories, and the psychological bandwidth for expansive exploration.

The current client base is navigating layoffs, AI disruption, organizational restructuring, and strategic uncertainty. They need operationally grounded coaching: decision frameworks for ambiguous situations, political navigation during restructuring, career positioning in AI-transformed organizations, and concrete 90-day action

plans. The coach who asks "What would your ideal life look like?" to a client who just watched their department lose 30% of its headcount is not meeting the client where they are.

#### **Link 4: Client attrition from traditional coaching** (Emerging — Projected)

Clients who perceive a mismatch between what they need and what their coach offers do not typically provide feedback. They reduce session frequency, shorten engagements, and eventually stop scheduling. The coach experiences this as "clients are harder to retain" without recognizing the structural cause.

The coaches who retain clients in this environment are those who have shifted to operationally directive, results-focused engagement. This is not a style preference. It is a structural requirement imposed by the current psychological state of the client base.

### **Decision Threshold**

**For coaches who have not repositioned by end of Q2 2026:** Client attrition accelerates as the remaining corporate clients complete their current restructuring cycles and evaluate which external partners delivered measurable results during the disruption. Coaches who were perceived as "supportive but not strategically useful" during this period will not be renewed. This is a binary threshold: coaches who reposition before the evaluation window close retain access to their client base. Those who do not will need to rebuild from a significantly diminished starting position.

## Chain 3: The Supply Glut Meets Demand Collapse.

### ● Active — Confirmed

The COVID-era coaching enrollment surge produced a massive influx of new credentialed coaches who are now competing for a shrinking client pool. Simultaneously, AI coaching platforms are entering the market as additional supply-side pressure.

#### **Link 1: COVID-era coaching school enrollment surge** (Active — Confirmed)

ICF membership surged from 33,594 in 2019 to 58,279 in 2023, a 73% increase in four years. Global coach practitioners grew from approximately 71,000 to 109,200 between 2019 and 2022 (54% increase), and continued to 122,974 by 2025 (ICF Global Coaching Study, 2025).

The U.S. professional coaching population reached 232,000+ by 2025 (ResearchAndMarkets, 2025), creating what the report describes as "an army" serving clients in a \$16 billion industry. The framing obscures the per-capita revenue implication: more practitioners dividing a stagnating revenue pool.

#### **Link 2: New coaches enter a contracting market** (Active — Confirmed)

The timing is structurally unfortunate. Coaches who enrolled in training programs during 2020-2022, attracted by the pandemic-era narrative of coaching as a growth profession, are now completing certification and entering active practice precisely as corporate demand contracts. They arrive with credentials but without established client relationships, competing against entrenched practitioners for a diminishing number of engagements.

The income data confirms the bifurcation: first-year coaches average \$14,484 annually while 10+ year veterans average \$69,721 (ICF, 2025). But the veteran cohort is itself under pressure, with only 48% expecting revenue growth.

#### **Link 3: AI coaching platforms as additional supply pressure** (Active — Emerging)

BetterUp (valued at \$1B+, revenue projected to reach \$500M by 2026) has launched "Human + AI Coaching for All," offering continuous AI coaching alongside human sessions at enterprise scale. CoachHub raised a \$200M Series C and released AIMY 2.0, its conversational AI coach. The coaching apps market is projected to grow at 15.3% CAGR through 2033.

These platforms do not replace high-end executive coaching. They replace the middle of the market: the \$150-\$300/hour coaching that constitutes the majority of engagements for coaches in the 3-10 year experience bracket. BetterUp's individual sessions range from \$75-\$250. When the AI component is included, the effective per-session cost to the enterprise drops further.

**Link 4: Consolidation and exit wave** (Emerging — Projected)

The structural math: supply grew 54% between 2019 and 2022 while U.S. business coaching revenue declined 0.3% annually. More than 53% of coaches earn less than \$30,000. As corporate demand continues to contract and AI platforms absorb mid-market volume, the coaches in the bottom two quartiles of the income distribution face a viability threshold.

Directional evidence suggests an exit wave is already underway among coaches who entered during 2020-2022 and have been unable to build sustainable practices. This is a data gap: no authoritative source tracks coach attrition rates. The ICF tracks new credentials and membership; it does not publish data on coaches who leave the profession.

**Saturation Dynamics**

| METRIC                                | 2019         | 2022         | 2025           | DIRECTION                |
|---------------------------------------|--------------|--------------|----------------|--------------------------|
| Global coach practitioners            | ~71,000      | 109,200      | 122,974        | Up 73% in 6 years        |
| ICF membership                        | 33,594       | 56,400       | ~60,000 (est.) | Up 79% in 6 years        |
| U.S. business coaching revenue growth | Baseline     | -0.3%/yr     | -0.3%/yr       | Flat to declining        |
| Coaches earning <\$30K                | Not reported | Not reported | 53%            | Majority sub-threshold   |
| Avg. hourly rate (global)             | \$231        | \$244        | \$256          | Up 5% nominal, flat real |

## Chain 4: The Relevance Gap.

### ○ Emerging — Projected

The clients who remain are navigating organizational challenges that most coaching frameworks were not built to address. This creates a structural relevance gap that compounds the demand, psychology, and supply pressures described above.

#### **Link 1: Organizational complexity acceleration** (Active — Confirmed)

Organizations are simultaneously managing AI integration, workforce restructuring, strategic uncertainty from trade policy, and compressed decision cycles. The pace of structural change in 2025–2026 exceeds anything in the prior two decades. AI was cited as the reason for 54,836 layoff announcements in 2025 alone (Challenger, 2025), up from zero before 2023. In early 2026, AI-cited cuts already account for 8% of total announcements and the percentage is rising.

LinkedIn data shows 86% of organizations cannot clearly see their current skills, cannot mobilize talent, and cannot keep pace with AI-driven change (LinkedIn Talent Report, 2026). The remaining 14% are pulling ahead. This gap is widening, and it defines the terrain coaching clients must navigate.

#### **Link 2: Coach framework obsolescence** (Emerging)

The dominant coaching frameworks in use by the 8+ year cohort were developed for a different organizational reality. They assume stable organizational structures, clear role definitions, predictable career paths, and clients with the bandwidth for reflective exploration. None of these assumptions hold in the current environment.

The coaches who remain relevant are those who can engage with AI-driven workforce restructuring, organizational redesign under uncertainty, strategic decision-making with incomplete information, and the political dynamics of contracting organizations. This is not about adding "AI literacy" to an existing practice. It is about whether the coach's operating framework matches the complexity of what clients are navigating.

#### **Link 3: Client perception of coaching as insufficient** (Emerging)

When a client brings an AI-driven organizational restructuring challenge to a coach whose framework is built around identity exploration and growth mindset, the client experiences the coaching as insufficient. Not wrong, but insufficient. The coach may be competent within their framework. The framework itself does not reach the problem.

This creates a specific failure mode: the client does not complain. They do not provide feedback. They simply conclude that coaching is not the right tool for their current challenge and discontinue. The coach loses the client without understanding why.

**Link 4: Structural client attrition from relevance mismatch** (Projected)

As organizational complexity continues to accelerate and coaches who have not updated their frameworks continue to apply pre-2023 methodologies, client attrition from relevance mismatch will compound the attrition from demand collapse and client psychology shift. The coaches who lose clients to the relevance gap will not recover them, because the clients will not return to coaching. They will conclude that coaching itself was the wrong tool, when in fact it was the coach's framework that was insufficient.

## Synthesis: Who Survives the Consolidation.

The four chains converge to produce a clear structural picture. Not all coaches are equally exposed. The consolidation will be distributed along specific axes.

### Coaches Who Survive

These are specific characteristics, not aspirational qualities:

- 1. Corporate coaches with measurable, operationally grounded offerings.** Coaches who can demonstrate ROI in terms the CFO recognizes: reduced time-to-productivity for new leaders, measurable improvement in team performance metrics, successful navigation of specific organizational transitions. Coaching delivers an average ROI of 7x investment (ICF, 2025), but only when the coach can articulate the return in operational terms.
- 2. Coaches who have repositioned around the current moment.** AI-driven workforce restructuring, organizational redesign, strategic decision-making under uncertainty: these are the problems the remaining clients face. Coaches who can credibly engage with these problems retain access to the client base. Credibility here means demonstrated understanding of the organizational dynamics, not a weekend workshop on "AI for coaches."
- 3. Coaches with niche specialization and established referral networks.** The generalist executive coach is the most vulnerable position. Coaches who have built deep specialization in a specific industry, function, or challenge type and who have established referral relationships that generate consistent inbound demand are structurally insulated from the worst effects of the supply glut.
- 4. Coaches who price above the AI replacement threshold.** The \$150-\$300/hour range is exactly where AI coaching platforms compete. Coaches in this range face direct substitution pressure. Coaches who command \$400+/hour for specialized, high-stakes engagements are competing in a different market that AI platforms do not yet address.

### Coaches Who Do Not Survive

- 1. Generalist coaches in the \$150-\$300/hour range** who depend on corporate clients for more than 50% of revenue and have not differentiated their offering.
- 2. Coaches whose frameworks are primarily identity-level and exploratory** and who have not added operationally directive capabilities.
- 3. Coaches who entered the profession during 2020-2022** and have not built sustainable client pipelines. The income data (\$14,484 first-year average) indicates that most new entrants are already below viability.

**4. Coaches who rely on credential-based differentiation.** ICF credentials have shifted from differentiator to baseline requirement. Credentials alone do not protect against any of the four chains.

## The 90-Day Decision Window.

Decisions available now that close within two quarters:

### **Decision 1: Reposition the offering around current client needs.**

*Deadline: End of Q2 2026*

The corporate evaluation cycle for external coaching partners typically runs annually, with mid-year reviews. Coaches who have not repositioned their offering to address AI-driven organizational complexity, restructuring navigation, and operationally measurable outcomes by the time mid-year reviews occur will not be renewed. The repositioning must be visible to existing clients: updated engagement framing, new deliverables, different session structure.

### **Decision 2: Establish an AI-informed practice.**

*Deadline: End of Q3 2026*

This is not about using AI tools in coaching (though that matters). It is about being able to coach on AI-related organizational challenges with credibility. Coaches who develop genuine fluency in AI-driven workforce dynamics within the next 90 days can position themselves in a category that is structurally underserved. After Q3 2026, the early movers will have established the category and the window for differentiation will narrow.

### **Decision 3: Price above or below the AI substitution band.**

*Deadline: Immediate*

The \$150-\$300/hour range is a structural trap. Coaches must either move upmarket (deeper specialization, higher-stakes engagements, \$400+/hour) or move to a fundamentally different model (group coaching, cohort-based programs, advisory retainers). Remaining in the substitution band as AI coaching platforms scale is a slow attrition.

### **Decision 4: Build or deepen a referral network.**

*Deadline: Ongoing, but initiate immediately*

In a contracting market, the coaches who survive are those with consistent inbound demand. Referral networks take 6-12 months to produce results. Coaches who start building intentional referral relationships now will have a functioning network by Q4 2026. Those who wait will be building during the worst of the consolidation.

## Cost of Inaction.

| SCENARIO                              | 12-MONTH OUTLOOK: NO ACTION   | 12-MONTH OUTLOOK: REPOSITIONED   |
|---------------------------------------|---|--|
| <b>Revenue</b>                        | 25–40% decline from current baseline. Corporate clients do not renew. New client acquisition becomes significantly more difficult as supply competition intensifies.  | 10–15% decline (market conditions still apply) but stabilized by retained corporate clients and new positioning in underserved categories.                                     |
| <b>Client base</b>                    | Net loss of 3–5 corporate clients. Remaining clients reduce engagement frequency. Pipeline dries as referral sources redirect to coaches who match current client needs.  | Net loss of 1–2 corporate clients (market attrition is unavoidable) but 2–3 new clients from repositioned offering. Engagement frequency stabilizes or increases.              |
| <b>Market position</b>                | Squeezed between AI platforms below and repositioned specialists above. No clear differentiation. Increasingly competing on availability and price.   | Established in a specific, defensible category. Clear differentiation from both AI platforms and generalist competitors. Able to command premium pricing.                      |
| <b>Practice viability (24 months)</b> | At current trajectory, practice falls below the sustainability threshold (defined as: coaching revenue covers less than 60% of practitioner's required income). Recovery from this position requires effectively restarting the practice. | Practice remains viable. 24-month outlook improves as consolidation removes competitors who did not reposition. Surviving the consolidation is itself a competitive advantage. |

## Counter-Indicators: What Could Prove This Wrong.

Intellectual honesty requires mapping the forces that could moderate, delay, or partially invalidate this projection. We identify four counter-indicators. None of them, in our assessment, reverses the structural trajectory. But several could meaningfully slow it, and one could alter the shape of the consolidation in ways that benefit a different cohort of coaches than our base case predicts.

### Counter-Indicator 1: The aggregate market is still growing

The Executive Coaching and Leadership Development market is estimated at \$103.6B in 2025 and projected to reach \$174.5B by 2031 (Mordor Intelligence). Corporate coaching spend is growing at 8.4% annually. 70% of companies invest in executive coaching as a core component of leadership development (ICF, 2025). 87% of organizations report positive ROI from coaching. These are not trivial numbers, and they cut directly against the "demand collapse" framing.

**Our assessment:** This is the strongest counter-indicator. It is also the most misleading. The aggregate market growth figure includes AI coaching platform revenue (BetterUp alone is projecting \$500M by 2026), enterprise leadership development programs that flow through large consultancies rather than independent coaches, and international growth (Asia +86%, Middle East/Africa +74%) that does not benefit U.S. independent practitioners. The aggregate market can grow while per-practitioner revenue for independent U.S. coaches declines. That is exactly what the IBISWorld data shows: total market flat-to-declining while practitioner count grows 5.4% annually. The counter-indicator is real at the market level. It does not apply at the practitioner level where our projection operates.

**What would change our confidence:** If per-practitioner revenue for U.S. coaches with 5+ years experience showed growth in the 2025 ICF data (which reports income by experience band), we would downgrade this projection from Moderate-High to Moderate.

### Counter-Indicator 2: AI as augmentation, not replacement

45% of coaches now report that AI significantly augments their practice rather than replacing it (ICF Technology Survey, 2025). The emerging model across BetterUp, CoachHub, and newer platforms is "Human + AI" coaching, where AI handles between-session nudges, administrative overhead, session preparation, and content recommendations, while human coaches handle the high-stakes relational work. This framing suggests AI could expand the coaching market by making it more accessible and operationally efficient, rather than cannibalizing it.

**Our assessment:** This counter-indicator is partially valid. For coaches who integrate AI tools into their practice, the technology does reduce administrative burden and could allow them to serve more clients at higher quality. The issue is that this primarily benefits coaches who adopt the technology, which skews toward younger, tech-fluent practitioners — not the 8+ year veteran cohort that this analysis addresses. More importantly, the "Human + AI" model at the enterprise level (BetterUp, CoachHub) routes the AI-augmented coaching through the platform, not through independent practitioners. The platform captures the margin. The independent coach who doesn't adopt AI tools loses clients to the platform that has. This counter-indicator is real for platform-affiliated coaches. It reinforces rather than contradicts our projection for independents.

**What would change our confidence:** If BetterUp or CoachHub announced an affiliate model that routed AI-augmented clients to independent coaches (rather than platform-employed coaches), the supply-side pressure dynamics in Chain 3 would materially shift.

### Counter-Indicator 3: The complexity premium

Our Chain 4 (The Relevance Gap) argues that coaches are mismatched to client needs. The counter-argument is that the very complexity driving that mismatch also increases the demand for sophisticated human guidance. Organizational leaders navigating AI-driven restructuring, strategic uncertainty, and compressed decision cycles arguably need coaching more than ever. The market research supports this: escalating C-suite succession gaps, compressed corporate strategy cycles, and generative AI adoption are all cited as growth drivers for coaching demand (Mordor Intelligence, 2025).

**Our assessment:** This counter-indicator is valid but applies to a narrow band of practitioners. The coaches who benefit from the complexity premium are those who can credibly engage with AI-driven organizational dynamics at the strategic level. That requires domain expertise that most coaching frameworks do not provide. The complexity premium is real. It accrues to the top 15-20% of practitioners. For the remaining 80%, the same complexity that creates demand for sophisticated coaching also renders their existing frameworks insufficient to capture it. This counter-indicator does not invalidate the projection. It specifies which coaches benefit from the consolidation.

**What would change our confidence:** If coaching training programs rapidly integrated AI-fluent organizational strategy into their curricula (not "AI for coaches" tooling workshops, but genuine strategic frameworks), the relevance gap could close faster than our projection estimates. We see no evidence this is happening at scale.

## Counter-Indicator 4: Post-layoff coaching demand surge

Historical patterns show that periods of corporate restructuring are often followed by spikes in coaching demand as surviving leaders take on expanded roles, newly promoted executives need accelerated development, and organizations invest in retention of remaining talent. If the current layoff cycle peaks in mid-2026 (plausible given the Challenger data trajectory), a demand recovery for coaching could begin by Q4 2026 or Q1 2027.

**Our assessment:** This is historically supported and could moderate the timeline of our projection. The 2008–2010 cycle saw a coaching demand recovery approximately 18 months after the layoff peak. The 2020 cycle saw a faster recovery (12 months) driven by pandemic-specific dynamics. If the current cycle follows a similar pattern, the consolidation window may be shorter than our base case, and coaches who survive through Q3 2026 may see demand stabilize sooner than projected. However, this cycle differs from prior analogues in one critical respect: AI coaching platforms did not exist in 2008 or 2020. When demand recovers, a meaningful share of it will be captured by platforms rather than independent practitioners. The post-layoff surge, if it materializes, will be real but will not be distributed evenly.

**What would change our confidence:** If Challenger data shows monthly cuts falling below 50,000 for three consecutive months before Q3 2026, we would compress the consolidation timeline and upgrade the demand recovery probability.

## Net Assessment

None of these counter-indicators invalidate the structural trajectory. The strongest (aggregate market growth) operates at a level of abstraction that does not reach the independent practitioner. The most actionable (complexity premium) confirms rather than contradicts the projection by specifying the survival characteristics more precisely. We maintain our Moderate-High confidence in the overall projection while acknowledging that Counter-Indicator 4 (post-layoff surge) could compress the consolidation timeline if the layoff cycle peaks sooner than expected.

## Data Sources and Citations.

1. ICF Global Coaching Study, 2023. International Coaching Federation / PricewaterhouseCoopers. Market size, practitioner counts, revenue, session rates.
2. ICF Global Coaching Study Executive Summary, 2025. Practitioner growth to 122,974, revenue \$5.34B, confidence metrics.
3. ICF Membership Data, 2019–2023. Membership growth from 33,594 to 58,279.
4. ATD State of the Industry Report, 2024 (2023 data). Per-employee learning spend \$1,283, 17.4 learning hours.
5. ATD State of the Industry Report, 2025 (2024 data). Per-employee spend declined to \$1,254, learning hours fell to 13.7.
6. Training Magazine Industry Report, 2025. Total U.S. training expenditures \$102.8B. Large company budgets declined from \$13.3M to \$11.7M. Coaching/mentoring flat at 28%.
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8. LinkedIn Labor Market Report, 2025–2026. Hiring 20%+ below pre-pandemic levels. Workforce Confidence Index declining.
9. LinkedIn Talent Report, 2026. 86% of organizations cannot keep pace with AI-driven change.
10. IBISWorld, 2024. U.S. business coaching revenue declined 0.3%/yr (2019–2024); business count grew 5.4%/yr.
11. ResearchAndMarkets, 2025. U.S. professional coaching industry: 232,000+ coaches, \$16B industry.
12. BetterUp corporate data, 2025. \$566.9M raised, \$1B+ valuation, projected \$500M revenue by 2026.
13. CoachHub corporate data, 2025. \$200M Series C, AIMY 2.0 AI coach release.
14. Mordor Intelligence, 2025. Executive Coaching and Leadership Development market projected at \$103.6B in 2026.

## Data Gaps.

- 1. Coaching school closures and enrollment data 2024-2025.** No authoritative source tracks coaching training program closures specifically. General higher education closure data exists but does not disaggregate coaching programs.
- 2. Rich Litvin's 2025 statement about coaches leaving the industry.** While Litvin has published content about why coaches fail and has a podcast episode titled "Why Most Coaches Fail in 2025," no specific formal statement about coaches leaving the industry was found in the search results. This should be sourced directly from his podcast, social media, or newsletter.
- 3. Coaching engagement length trends.** The shift from 6-12 month to 3-month engagements is widely reported anecdotally but lacks a single authoritative data source. ICF does not track average engagement duration in its published studies.
- 4. Coach attrition rates.** No authoritative source tracks how many coaches leave the profession annually. ICF tracks new credentials and active membership but does not publish attrition or non-renewal data.
- 5. EMCC credentialing data.** European Mentoring and Coaching Council data was not found in sufficient detail to cite specific credentialed coach population growth figures.
- 6. Specific corporate coaching budget line-item data.** While L&D spending data is available at the aggregate level, coaching-specific budget data within corporate L&D is not publicly reported at a granular level. The Training Magazine data showing coaching/mentoring at 28% of anticipated purchases is the closest proxy available.

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*Next review: June 2026 (Q2 threshold assessment)*

*Classification: Confidential*

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*This brief was prepared using the Hari Projection Framework v2.1. The framework is a living analytical tool — projections should be updated as new data emerges.*

*Methodology note: This analysis is designed to be roughly right rather than precisely wrong. All confidence levels and probability estimates are informed inference (Data Sourcing Hierarchy level 5) unless otherwise noted.*