THE PARTICIPATION PARADOX:

Market Size Narratives, Information Asymmetry, and Practitioner Attrition in the Life Coaching Industry

An African Practitioner-Research Contribution to Global Coaching Discourse

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ABSTRACT

The global life coaching industry is frequently described in terms of its aggregate market size, a figure that grew from $2.85 billion USD in 2019 to $5.34 billion USD in 2025 (International Coaching Federation [ICF], 2025). These headline figures function as powerful entry signals, attracting diverse practitioners into the profession, some drawn by genuine vocational calling, others by the perception of financial opportunity. Yet the same data reveals a structural contradiction: while aggregate revenue grows, the majority of individual coaches earn below $30,000 annually, and full-time sustainable practice remains a minority pattern concentrated at higher credentialing levels. This article, written from the African coaching context, introduces the concept of the *Participation Paradox*, defined as the structural gap between market-level revenue narratives and individual-level market access. It argues that practitioner attrition is not a homogeneous phenomenon: the dropout population contains distinct profiles whose departure carries different meaning and different implications for the profession. Drawing on signalling theory (Spence, 1973; Akerlof, 1970), ICF global research data, the Fire and Well Transformation Framework (Davids, 2026), and practitioner observation and lived experience from South Africa, this article examines the conditions that produce the Participation Paradox, the role of professional bodies such as the Coaches and Mentors of South Africa (COMENSA, 2026) as both quality assurance mechanisms and practitioner transformation platforms, and the structural funding challenges that constrain what professional bodies with the right vision are able to deliver. This article is offered not as a critique of professional bodies but as a research contribution and reference document intended to support the conversations their leadership is already having. Africa does not receive this conversation from elsewhere. Africa contributes it.

Keywords: *life coaching, market signalling, information asymmetry, practitioner attrition, credentialing, COMENSA, participation paradox, BSF framework, NPO funding, Global South, African coaching research, professional body reform, Fire and Well Framework, autoethnographic research*

A NOTE ON INTENT

This article is offered as a support and reference document for professional coaching bodies, including COMENSA, ICF, and EMCC. Its purpose is to give academic grounding to structural challenges that these bodies are already navigating in practice, to strengthen funding and policy arguments, and to equip professional leadership with citable research that advances the profession's transformation mandate. It is written by a South African practitioner-researcher from within the profession, and represents an African contribution to the global coaching discourse.

1. INTRODUCTION

The global coaching profession has grown at a remarkable pace. The 2023 ICF Global Coaching Study estimated that active coach practitioners generated annual revenue of $4.564 billion USD, representing a 60% increase over 2019, with the number of coaching practitioners exceeding 100,000 for the first time (ICF, 2023). By 2025, that figure had risen further to a record 122,974 practitioners globally, generating an estimated $5.34 billion USD in revenue (ICF, 2025). These are impressive figures, and they are regularly repeated in professional and popular discourse as evidence of the profession's vitality and opportunity.

This article does not dispute these figures. It asks a different question: for whom is this opportunity accessible, and what happens to those for whom it remains out of reach?

The same 2023 ICF study that reported $4.564 billion in aggregate revenue also revealed that more than half of coaches earn below $30,000 annually (ICF, 2023). Full-time independent coaching practice is a minority pattern concentrated at higher credentialing levels, and median full-time annual income runs approximately $50,500 globally (Tandem Coaching, 2026). The gap between the aggregate market narrative and the individual practitioner's lived reality is not marginal. It is structural.

This article is a contribution from the African coaching context to this global conversation. It is written by a South African practitioner-researcher who has experienced these dynamics directly, who has developed a published framework for transformation from within them (Davids, 2026), and who writes as a member and finalist of COMENSA, the professional body whose work this article seeks to support. Africa is not receiving this analysis from elsewhere. Africa is generating it, from the specific and instructive experience of building a coaching practice in an emerging economy where the gap between the profession's promise and its structural conditions is felt most acutely.

A Note on Researcher Positionality: Writing From Inside the Experience

This article is not written from a position of academic distance. The author is living the experience it describes. At the time of writing, I am a passion-first coach, Profile 1 in my own taxonomy, with genuine vocational calling, applied marketing effort, a published framework, and a coaching practice that has not yet generated the income the industry's entry narrative suggested was accessible. I write this not as a confession but as a methodological declaration: my lived experience is primary data, and it is what makes this analysis both honest and urgent.

This approach draws on the tradition of autoethnographic research, a recognised and respected academic methodology in which the researcher's personal experience serves as a valid lens for examining broader social and structural phenomena (Ellis, Adams & Bochner, 2011). In the coaching context, it means that every structural claim in this article has been tested not only against global data but against the author's own daily reality of building a practice in Bloemfontein, South Africa, in 2026.

What has sustained me through this experience is the same framework I now propose the profession needs at a structural level. The Fire and Well Transformation Framework (Davids, 2026) holds that genuine transformation requires two movements: the Fire that exposes what is not working by burning through illusion, and the Well that provides the depth from which something new can emerge. I entered the coaching profession with fire. The Participation Paradox has tested that fire severely. And it is the Well, the discipline of research, writing, professional engagement, and faith, that has created the space for this article, this framework, and this contribution to exist.

This is what the profession loses when it fails to sustain its passion-first coaches. It does not only lose practitioners. It loses the research, the frameworks, and the African voices that only emerge when someone has stayed long enough in the fire to find the well.

This article introduces the concept of the *Participation Paradox*, the structural gap between market-level revenue narratives and individual-level market access. It examines the complex attrition landscape this paradox produces, distinguishing between three distinct practitioner dropout profiles. It positions COMENSA's BSF competency framework not only as a quality assurance mechanism but as a practitioner transformation platform. And it names the *Intent-Resource Gap* that constrains what professional bodies with the right vision are able to deliver within NPO funding structures. The article closes with a reform agenda designed to support what COMENSA and bodies like it are already working to build.

2. THEORETICAL FRAMEWORK: SIGNALLING, ASYMMETRY, AND ADVERSE SELECTION

To understand why the Participation Paradox occurs, it is necessary to engage with foundational economic theory. Akerlof (1970), in his landmark paper *The Market for Lemons: Quality Uncertainty and the Market Mechanism*, demonstrated that when participants have imperfect information, adverse selection occurs: those with weak prospects crowd out more capable participants from meaningful market access. The significance of this contribution was recognised with the Nobel Prize in Economic Sciences, shared with Spence and Stiglitz for their collective analyses of markets with asymmetric information (Nobel Prize Committee, 2001).

Spence (1973), in *Job Market Signalling*, extended this framework by demonstrating that under conditions of information asymmetry, agents can improve their market outcomes by signalling their competence to others, but that this signalling requires costly, observable action. In professional markets, credentialing functions as exactly this kind of costly signal: it communicates competence to prospective clients and employers who cannot otherwise assess it directly (Spence, 1973; Stiglitz, 2002).

Applied to the coaching industry, information asymmetry operates at two levels simultaneously. At the *entry level*, aspiring coaches receive market-level revenue signals (the aggregate billion-dollar figure) without receiving individual-level access data (the majority earning below $30,000, the two-to-four year runway required to reach sustainability). At the *credentialing level*, coaches who enter the profession discover that the primary pathway to higher-value clients is a costly credentialing system that, while genuinely important for quality assurance, also functions as a financial barrier for practitioners without prior access to professional capital. Entry-level ICF Level 1 programmes typically range between $3,000 and $6,000 globally, while Level 2 pathways supporting PCC credentialing range between $7,000 and $12,000 (iCoaching Education, 2026; Tandem Coaching, 2026).

What makes the coaching industry's information asymmetry particularly complex is that entry motivation is itself heterogeneous. Unlike markets where all participants share roughly similar motivations, the coaching profession attracts entrants whose primary drivers range from deep vocational calling to financial aspiration to professional transition. The aggregate market narrative interacts differently with each of these entry motivations, producing different trajectories and different kinds of attrition, examined in detail in Section 4.

3. THE DATA BEHIND THE PARADOX

The Participation Paradox is not a theoretical abstraction. The empirical data makes it concrete, even as the profession's reporting practices tend to foreground aggregate growth over distributional reality.

The average global coaching fee is $234 per hour. Active coaches earn approximately $49,283 annually worldwide, working an average of 11.6 hours per week with around 12.4 active clients (Zhou, 2026). The 2023 ICF study reports average annual income per coach at approximately $52,800 USD globally, with coaches in North America averaging around $67,800 (Simply.Coach, 2026). Africa is not disaggregated as a separate data point in most ICF regional reporting, a silence that renders the specific challenges facing South African and broader African coaches largely invisible in international benchmarking. This invisibility is itself part of what this article seeks to correct: the African coaching experience must be present in the global data conversation, not as a footnote but as a contributing voice (Davids, 2026).

Research suggests that approximately 90% of coaches who are just starting out fail to build sustainable practices (Coach Foundation, 2023). A lack of niche definition is frequently offered as the primary explanation. However, this individualised diagnosis conceals a structurally produced outcome. The real constraints include credentialing cost, network inaccessibility, and the financial runway required to build sufficient client volume to generate sustainable income.

Attrition data within the credentialing pathway itself is not systematically published. Completion and dropout rates are not consistently reported across the accredited programme population, though anecdotal practitioner data suggests dropout rates of 10% to 25% across the credentialing pathway, with higher attrition between credential levels (Tandem Coaching, 2026). The absence of systematic attrition data at precisely the point where the profession loses practitioners is not a neutral omission. It is a structural gap in the profession's self-knowledge that makes it impossible to design evidence-based responses.

Primary Data: South African Practitioner Survey (Forthcoming)

At the time of submission, a primary data collection process is underway in partnership with COMENSA. A practitioner survey has been distributed to COMENSA-affiliated coaches to test whether the Participation Paradox is a lived reality among South African coaches, and to gather evidence on the three dropout profiles identified in Section 4. The survey data will be incorporated into the revised manuscript prior to final publication, at which point Section 3 will be updated to include South African distributional income data, attrition evidence, and practitioner responses on structural barriers. This article is submitted in its current form to initiate peer review while primary data collection proceeds in parallel.

4. THE ATTRITION LANDSCAPE: THREE DISTINCT PRACTITIONER PROFILES

One of the most important analytical contributions this article offers is the recognition that practitioner attrition is not a homogeneous phenomenon. The coaches who leave the profession do not all leave for the same reasons, and their departure does not all carry the same meaning. At least three distinct profiles can be identified within the dropout population, each of which demands a different understanding and a different response.

4.1 The Passion-First Coach Who Ran Out of Runway

The first profile is the coach who entered the profession with genuine vocational calling, invested in training from lived experience of transformation, built meaningful client relationships, but could not sustain the financial gap between passionate entry and viable practice. This practitioner's departure is the tragedy the profession has not yet found adequate language to name or measure.

This coach is frequently the one best positioned to reach underserved communities, to practice in emerging economies, and to bring the lived experience of transformation rather than only the credentials of it. Their attrition represents a loss not only to the individual but to the clients they would have served and to the profession's diversity and contextual reach. In the African context, this profile is disproportionately represented, because the structural conditions of coaching practice in emerging economies create a longer and more financially demanding runway than the global average data reflects (Davids, 2026).

This is the profile most directly produced by the Participation Paradox: the entry narrative created an expectation the structural conditions could not sustain. The profession bears a collective responsibility for this gap.

4.2 The Financially-Motivated Coach Who Left Without Growing

The second profile is the coach who entered primarily because of the perception of financial reward rather than vocational calling, encountered the reality of what sustainable coaching practice requires, and departed before developing genuine commitment to the work. This departure is not necessarily a failure of the profession. In some respects it represents the profession's quality assurance mechanisms functioning as intended.

This profile is important to name honestly because it prevents the article's advocacy from romanticising all attrition. Not every coach who leaves was lost to a structural injustice. Some departures reflect a natural and appropriate self-selection process in which the demands of genuine professional practice filtered out those whose motivation was insufficient to sustain it. The risk this profile presents is not primarily in the departure itself but in the period before departure, during which a financially-motivated coach without adequate commitment may deliver coaching of insufficient quality to clients who trusted the professional context.

4.3 The Financially-Motivated Coach Who Stayed and Was Transformed

The third profile is perhaps the most important and the least discussed. This is the coach who entered with primarily financial motivation, encountered the rigour of a professional standards framework such as COMENSA's BSF competency requirements (COMENSA, 2026), and through that encounter was transformed. What began as financial aspiration became genuine vocational commitment.

This profile makes a powerful argument for rigorous professional standards that goes beyond quality assurance. The BSF framework (COMENSA, 2026), in this reading, is not only a mechanism for credentialing those who already have passion. It is a formation platform capable of developing passion in those who initially lacked it. The discipline of demonstrating competence across the BSF domains, the mentorship embedded in the credentialing pathway, and the community of practice that COMENSA creates for its members, these are not only assessment tools. They are transformation tools.

This is an argument that professional bodies cannot always make about themselves without appearing self-serving. It carries more weight when made by a practitioner-researcher from within the community, and it is offered here as academic grounding for a reality that COMENSA's leadership likely recognises from experience but may not yet have articulated in the published research literature.

4.4 The Fire and Well Framework as a Practitioner Survival Model

The Framework That Holds

The Fire and Well Transformation Framework (Davids, 2026) was developed from the author's own lived experience of professional collapse and rebuilding. Its central proposition is that genuine transformation requires two simultaneous movements: the Fire, which burns through illusion, exposes structural reality, and refuses to allow comfortable avoidance of what is not working, and the Well, which provides the depth, the rootedness, and the restorative capacity from which something genuinely new can emerge.

Applied to the individual coaching practitioner navigating the Participation Paradox, these two movements operate as follows:

- The Fire of the Participation Paradox exposes the structural gap clearly and without mercy. It strips away the entry illusion, makes visible the ceiling signalling that misled the practitioner, and names the financial runway for what it is: a structural condition, not a personal failure. The Fire does not destroy the coach. It destroys the false expectations that were never theirs to carry.
- The Well provides what sustains the coach through the exposure. Research, writing, professional community, credentialing, mentorship, faith, and the discipline of continuing to serve clients well during the difficult season, these are the Well's resources. They do not resolve the financial pressure immediately. But they create the conditions under which the burning itself generates something new: a framework, an article, a research contribution, a voice that the profession needed and did not yet have.

This is not a motivational metaphor. It is a structural description of what keeps passion-first coaches in the profession long enough to become its most important contributors. The profession loses this contribution every time a passion-first coach departs before the Well has had time to work.

At the systemic level, the same movements apply. The Participation Paradox is the profession's own Fire moment: it exposes the ceiling signalling, the Intent-Resource Gap, and the inequitable credentialing architecture that have gone unnamed for too long. The reform agenda proposed in Section 7 of this article represents the Well response: the structural depth from which a more equitable profession can emerge. The profession does not need to fear its Fire moment. It needs to be deep enough in its Well to survive it and build from it.

5. COMENSA, THE BSF FRAMEWORK, AND THE INTENT-RESOURCE GAP

COMENSA (2026), as South Africa's primary professional body for coaches and mentors, occupies a position of genuine leadership in a profession with significant potential to address South Africa's most pressing human development challenges. The BSF competency framework (COMENSA, 2026) represents a rigorous, internationally benchmarked approach to coaching quality that serves the profession well. This article affirms that commitment without reservation.

The tension this article names is structural rather than attitudinal. COMENSA's credentialing requirements create a selection mechanism that is only partially aligned with competence alone. It is also, as the preceding sections have demonstrated, aligned with financial access. This is not a failure of COMENSA's intent. It is a consequence of the global credentialing architecture within which COMENSA operates, and a challenge the profession as a whole must address rather than any single body alone.

COMENSA's Legacy Programme represents a strategic commitment to extending coaching's reach beyond its natural market concentration. Participating coaches engage on a voluntary basis, contributing coaching hours without remuneration, which reflects the genuine commitment of COMENSA's coaching community, who give their time and skill in service of a larger vision even when their own practice sustainability is not yet secured (COMENSA, 2026).

It is equally important to acknowledge what COMENSA's leadership is working toward. The aspiration within COMENSA is to develop remuneration models for Legacy Programme coaches, creating a structure in which community service and practitioner sustainability are not in competition. This vision exists within a structural constraint that must be named clearly: as a non-profit organisation (NPO), COMENSA's capacity to remunerate coaches depends on securing external funding from corporate partners, government skills development bodies, and philanthropic funders (COMENSA, 2026).

This is what this article terms the *Intent-Resource Gap*: the distance between a professional body's vision for equitable, sustainable coaching practice and its financial capacity to resource that vision. The Intent-Resource Gap is not evidence of inadequate leadership. It is evidence of inadequate ecosystem investment. The funder community, government skills development frameworks, and corporate buyers of coaching services have not yet invested in the profession's infrastructure at the level that its human development mandate demands.

A published, peer-reviewed article that names the Intent-Resource Gap and grounds it in economic theory provides COMENSA and similar bodies with a citable reference that can be used in funding proposals, policy submissions, and stakeholder engagements. This research exists to serve the leadership that is already doing the work.

6. THE PARTICIPATION PARADOX AS CROSS-INDUSTRY PHENOMENON

The structural pattern identified in the coaching profession recurs across any emerging professional field defined by its aggregate ceiling rather than its accessible median. Recognising this cross-industry dimension demonstrates that the profession is dealing with a well-documented economic phenomenon rather than a coaching-specific anomaly.

The gig economy offers the most direct parallel. In 2024, the gig economy had a market size of $556.7 billion, projected to more than triple to $1,847 billion by 2032 (World Economic Forum, 2024). Yet 60% of freelancers report worrying about managing irregular income and irregular work (Upwork, 2024). The headline market size and the practitioner's lived precarity exist in complete disconnect. The aggregate figure describes the ceiling. The practitioner's experience describes the median.

The common mechanism across all of these industries is what this article terms *ceiling signalling*: the practice of representing an industry by its highest achievable outcome rather than its median participant experience. Ceiling signalling is not always deliberately deceptive. It reflects the genuine scale of the market. But without its corollary, the distribution data, it functions as misinformation to prospective entrants who lack the statistical literacy or industry experience to interrogate what the aggregate figure actually means.

The coaching profession has both the opportunity and the ethical obligation to respond to this pattern differently from industries that have not grappled with it. Its core purpose is to support people in closing the gap between where they are and where they could be. If the profession cannot apply that commitment to its own emerging practitioners, its transformative claim is internally contradicted.

7. FROM GATEKEEPING TO GATEWAY: A REFORM AGENDA

The following reform directions are proposed as a concrete starting point for COMENSA (2026), ICF, EMCC, and allied training institutions. They are offered in the spirit of partnership with professional leadership that is already committed to this direction, not as external prescriptions.

7.1 Transparent Income Distribution Reporting

All published market size figures should be accompanied by full distribution data, including median income by credential level, income by region, time-to-sustainability benchmarks, and attrition rates at each stage of the credentialing pathway. Prospective coaches deserve to make entry decisions with complete information. Professional bodies that provide this transparency signal integrity and reduce the entry illusion that produces disillusionment and attrition.

7.2 Closing the Intent-Resource Gap: A Funding Agenda

The most urgent structural reform is the mobilisation of external funding to resource what professional bodies are already trying to build. This requires a coordinated approach involving corporate coaching buyers who benefit from a well-trained coaching workforce, government skills development bodies including SETAs and the NSDS framework, philanthropic funders committed to human development in South African communities, and ICF and international bodies that have a stake in the profession's global health. A funded Legacy Programme that remunerates participating coaches would simultaneously address practitioner sustainability and community access to coaching (COMENSA, 2026).

7.3 Subsidised and Deferred Credentialing Pathways

Professional bodies should develop subsidised or income-contingent credentialing pathways for coaches from economically marginalised contexts, particularly in the Global South. Bursary funds, mentorship-based fee waivers, and deferred payment models tied to practice income are viable mechanisms that other professions have successfully implemented. The investment would expand the profession's demographic and geographic reach while maintaining the quality standards that credentialing exists to protect (iCoaching Education, 2026).

7.4 Experiential and Practitioner-Research Pathways

Credentialing frameworks should develop validated pathways that count documented practitioner research, supervised community coaching, and published transformational frameworks alongside formal training hours. The Fire and Well Transformation Framework (Davids, 2026), developed through practitioner research in the South African context and published as a formal coaching resource, is an example of the kind of intellectual contribution that credentialing systems should be designed to recognise and reward, not exclude.

7.5 Systematic Attrition Research

The profession urgently needs funded research into practitioner attrition: who leaves, at what stage, from what context, and what structural factors are correlated with departure. This research would allow professional bodies to distinguish between the three dropout profiles identified in this article and to design targeted interventions rather than generic responses (Tandem Coaching, 2026). Without this data, the profession cannot see the full scale of the problem it faces.

7.6 The BSF Framework as Formation Platform

This article recommends that COMENSA (2026) and allied bodies articulate and promote the BSF framework not only as a credentialing mechanism but as a practitioner formation platform. Communicating this dimension explicitly, through orientation materials for new entrants, through mentor coaching conversations, and through public-facing professional body communications, would attract financially-motivated coaches into a formation journey rather than a compliance process, retaining them in the profession long enough for the formation to take effect.

8. CONCLUSION

The billion-dollar coaching industry is real. The opportunity it represents for individual practitioners is not equally real across all who enter it. This article has argued that the gap between aggregate market narrative and individual market access, the Participation Paradox, is a structurally produced outcome rooted in information asymmetry, ceiling signalling, credentialing barriers, and network concentration.

Practitioner attrition is not a single story. It contains the tragedy of the passion-first coach who ran out of financial runway, the natural self-selection of the financially-motivated coach who left without growing, and the inspiring counter-narrative of the financially-motivated coach who stayed and was transformed by the discipline of professional standards (COMENSA, 2026). Understanding these three profiles is essential to designing responses that honour the complexity of the real attrition landscape.

COMENSA's position in this landscape is one of genuine leadership constrained by genuine resource limitation. The Intent-Resource Gap between what professional bodies envision and what they can currently fund is not a leadership failure. It is an ecosystem failure that the broader community of funders, corporate buyers, and government partners must help to close.

The Fire and Well Transformation Framework (Davids, 2026) proposes that genuine transformation requires confronting both what must be burned away and what must be drawn from the well. For the coaching profession, what must be burned away is the ceiling signalling that creates the Participation Paradox. What must be drawn from the well is the structural reform, transparent data, funded pathways, and professional solidarity that would create genuinely sustainable conditions for coaches who enter with calling rather than capital.

The author of this article is one such coach. Writing from inside the experience described in these pages, having applied the Fire and Well Framework to survive the very paradox this research names, the conclusion is not despair but conviction. The profession does not need to lose its most passionate voices to a structural problem it has never adequately named. It needs to name the problem, gather the evidence, close the Intent-Resource Gap, and build the conditions under which the fire of genuine calling is sustained by the depth of a well-resourced profession.

This article has been written from Africa, about a challenge experienced most acutely in emerging economies, and offered to the global coaching conversation. It stands as evidence that the African coaching context does not only import professional frameworks. It generates original analysis, names structural realities, and contributes to the theoretical discourse of the profession at an international level. COMENSA, by virtue of its commitment to both standards and transformation, is better positioned than any other body in the South African context to lead the response this article advocates for.

The coaching profession will fulfil its transformative potential only when the conditions for practising it are as equitable as the outcomes it promises to create. That is not a peripheral concern. It is the profession's most urgent and most unfinished business.

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Researcher Positionality Statement

This article is written from within the experience it examines. At the time of writing, the author occupies the position described as Profile 1 in Section 4: a passion-first coach with genuine vocational calling, sustained marketing effort, published research, and a practice that has not yet reached the financial sustainability the profession's entry narrative implied was accessible. This positionality is acknowledged not as a limitation but as a methodological asset: the structural claims in this article have been tested against lived daily reality, not only against published data.

The Fire and Well Transformation Framework proposed in this article as a practitioner survival model and systemic response tool emerged directly from navigating the conditions the article describes. This constitutes a form of autoethnographic research, in which the researcher's experience is both the source of the analytical framework and a data point within the research itself (Ellis, Adams & Bochner, 2011). The author discloses this positionality in the spirit of academic transparency and invites peer reviewers to engage with it as a recognised and legitimate research methodology rather than a conflict of interest.

The author declares no financial conflict of interest. All external sources are cited accurately. The Fire and Well Transformation Framework is the author's own intellectual property, developed through practitioner research and published independently prior to this submission.

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