

HEALTH COACHING INDUSTRY REPORT

At the front lines of Health



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YourCoach presents V2 of the Health Coaching Industry Report

We present to you Version 2 of the Health Coaching Industry Report: at the Front Lines of Health, updated to reflect all the momentous changes and events that have transpired over the past two years in the health coaching industry, with a focus on the US market. We have conducted more than 50 interviews with experts and change drivers in health coaching, healthcare, reimbursements and more and analyzed over 100 scientific reports as well as open real-world data.

Executive Summary

As an industry, health coaching has blossomed into a burgeoning market with notable advancements such as:

- The approval of a taxonomy code for health & wellness coaching (171400000X)
- The start of data collection with the NBHWC and UC San Diego
- A steady increase in the number of yearly board-certified coaches as well as the number of coach training programs approved by the NBHWC
- A growing number of digital health solutions that surround their services and products with health & wellness coaching
- Increased focus on the science of health coaching and growing number of clinical trials

While significant changes have taken place and the health & wellness coaching industry in the US is steadily evolving, it also faces some challenges:

- There is still a lack of awareness among consumers and health professionals about who and what a true certified health coach is
- The term 'health coach' is often misused and bundled with care navigation and support, leading to misunderstandings of the profession's value and efficacy
- While the healthcare system is moving to a value-based model instead of a fee-forservice model, health coaches are still a rarity as a part of the health and care team
- COVID-19 brought a deeper understanding of mental health challenges, but also a greater need for clinicians, nurses, psychotherapists and health coaches.
 Health and wellness coaches are yet to fill that gap at scale
- As the health coaching industry continues to evolve and grow, there is a lack of transparency on the supply side of the health & wellness coaching
- While the number of scientific studies has increased tremendously, there's room for more data on health coaching effectiveness and dissemination of this data among healthcare systems and populations

We are optimistic that positive and tremendous changes will continue taking place in the years to come. We're on the front lines of the Health Coaching Revolution and of the industry's growth and transformation. Keeping pace with this rate of change is an enormous challenge, but one we are gladly taking on here at YourCoach. Health, as the only operating system for behavior change powered by an army of health and wellness coaches!

INTRODUCTION

What is Health Coaching?

What is Health Coaching

A certified Health Coach is a trusted partner and mentor who empowers individuals to both identify and achieve their goals related to health, wellness, and mindset. Health coaches both encourage and support their clients every step of the way by using science-backed, behavior-driven lifestyle modification techniques.

Health coaching is about behavior change, about helping individuals unlock their potential and set realistic short and long-term goals as they relate to their health and wellness. At the heart of health coaching is a holistic approach, which considers the person as a whole, rather than focusing on illness, ailments or specific parts of the body. A holistic approach takes into consideration how the individual interacts with their environment as well as their biology, emphasizing the connection of mind and body.

To support the whole-person approach, coaches leverage evidence-based coaching modalities and are trained in scientifically validated behavior modification techniques such as motivational interviewing, the transtheoretical model of change, simple and complex reflections, self determination theory, social cognitive theory, appreciative inquiry, and nonviolent communication amongst others. These techniques encourage and elicit clients to understand and improve their health and wellness by helping them focus on personal goals, values, and strengths to drive meaningful behavior change in a deeply personal and individualized way.

66 A health coach is trained to bring out the best in you

Some tools health coaches might use to help clients achieve success include:

- Motivational Interviewing asking open-ended questions that guide clients to provide reasons for wanting to change and define their goals.
- Establishing accountability regularly checking in and leveraging technology to help clients keep their goals in mind.
- Positive psychology supporting a mindset that's conducive to change, improving confidence and self efficacy through affirmations, gratitude and more

Health coaches maintain a client-centered approach, activating clients' inner strengths and helping them to discover and cultivate new ones on their journey to better health. Coaches have been recognized by the AMA as integral members of health and care teams, and are key to helping clients and patients implement lifestyle changes that are needed to manage, prevent or improve health conditions.

The NBHWC defines health and wellness coaches as those who, "partner with clients looking to enhance their well-being through self-directed lasting changes, aligned with their values".

As <u>defined</u> by the The National Board for Health & Wellness Coaching (NBHWC)

A Health Coach is ...

What is a health coach and what do they do?

Health & wellness coaches partner with clients looking to enhance their well-being through self-directed lasting changes, aligned with their values.

In the course of their work, health & wellness coaches display unconditional positive regard for their clients and a belief in their ability to change, honoring the fact that each client is an expert on their own life while ensuring that all interactions are respectful and non-judgmental.

Health coaches work in different settings. Some work on healthcare teams alongside physicians and other allied health professionals as part of an integrative approach to client care.

Other coaches work in digital health, community-based programs, or entrepreneurial capacities.

Health & wellness coaches train in behaviour change theories, motivational strategies, and health education and promotion theories. They use these to support the client in creating and sustaining change for improved health and well-being.

For Career Seekers



For Health Seekers

As <u>defined</u> by the The National Board for Health & Wellness Coaching (NBHWC)

A Health Coach is ...

What is a health coach and how can they help?

Health & wellness coaches support clients in activating internal strengths and external resources to make sustainable and healthy lifestyle behavior changes. Health coaches use a client-centered approach wherein clients decide their goals, engage in self-discovery or active learning processes, and self-monitor behaviors to increase accountability, all within the context of an interpersonal relationship with a health coach.

Whatever goal the client sets, the health coach ensures that they are supported until the desired outcome is achieved. Board-certified coaches display an unconditional positive regard for their clients and have trained to the highest standards in the profession which means that they have the skills and knowledge to walk alongside you on your path to your healthiest self.

A Health Coach is

Health coach is **NOT** a Personal Trainer

A personal trainer is someone who works with clients to create a fitness and workout routine. While coaches encourage physical activity in most cases, they focus on many other aspects of a person's well-being including emotional and mental wellness. Some Health coaches do hold fitness certifications and can help those who are seeking both a health and wellness coach, as well as a personal trainer

Health coach is **NOT** a Doctor

Doctors are there for well-visits as well as to treat patients' ailments, symptoms and chronic health issues. This is highly beneficial, and the advice of a doctor is imperative and should always be taken into account. The role of a certified health coach, however, is to aid an individual in reaching their health and wellness goals through behavior modification as well as guide their clients through the turmoil of a chronic illness. Health coaches are integral members of the health and care team and work with patients in helping them adhere to a plan prescribed by their doctor

Health coach is **NOT** a **Nutritionist** or Dietitian

Health coaches can help clients establish action plans for generalized healthy eating behaviors, whereas nutritionists and dietitians can prescribe meal plans and give specific nutrition advice to the client according to their medical needs or goals

Health coach is **NOT** a Therapist

Health coaches don't need to be therapists or psychologists, and great coaches don't try to mimic what a mental healthcare professional does. These professionals do complement one another and often work together. A trained health coach understands their scope of practice and knows when to refer an individual to a mental health professional

A Health Coach DOES NOT

Health Coach DOES NOT have patients

The health coach/client relationship is vastly different from that of a conventional doctor/patient relationship. Health coaches can guide chronically ill individuals on their health journeys, but also work with healthy individuals wanting to reach wellness goals.

Health Coach **DOES NOT** heal clients

They use evidence-based skillful conversation, non-clinical interventions and strategies to actively and safely engage clients in behavior change which will positively impact their health and wellness.

A Health Coach is ...

- A highly skilled and certified professional
- Knowledgeable in human behavior,
 motivational techniques and health outcomes
- A change agent helping clients set and achieve health goals and build new habits
- Trained in helping a client maintain a positive and healthy mindset while working towards health and wellness goals by focusing on their strengths



Who needs a health coach?

Everyone (and we mean everyone) could use a health coach! We mean it. We're all on our own health journeys, and we all have different wellness needs and goals; but we promise you, whatever you'd like to work on, there's a health coach for you!

Especially as we grapple with ongoing and constantly changing health threats, like the COVID-19 pandemic; heart disease; metabolic issues; stress and anxiety; cancer diagnoses that seem to be happening at younger and younger ages; the list goes on; our global population has never been more in need of cultivating and pursuing healthier lifestyles. Health coaches are guides on this journey.



Health Coaching Types and Specialties



Group coaching

Typically applicable to a group of two or more people and is often offered as a cost-effective solution to those who may not be able to afford one-on-one coaching, desire a less individualized approach or prefer to work in a group setting





Individual coaching

Well-suited to individuals who may desire more tailored support, time, or guidance from their health coach. This approach might be preferred by people who have unique needs or very specific goals.

Health Coaching Types and Specialties

Offline vs Online

While coaching originated with in-person interactions, technology advancements have allowed coaches and clients to connect in an online environment. One of the many benefits of the virtual format is its ability to cross geographical barriers and create greater access to coaching services, such as in rural areas.

Health Coaching Specialities

While health coaches are trained in modalities that are applicable to all specialties and frequently work within several of these at any time, at times even with the same client, some health coaches prefer to focus on a particular specialty (niche) to further enhance their coaching toolbox with a deeper understanding of underlying physical, mental and biological conditions, inherent in these specialties. Specialization may be rooted in a personal connection, passion, or previous professional experience that may enable a coach to bring another layer of empathy, understanding and resources to the client's experience.



Health Coaching Specialities

Specialties: Preventive

- Weight Management
 & Dietary (ex. learning healthy habits)
- Better sleep habits
- Holistic health coaching

Teen coaching

Nutrition (ex. preventing IBS flare ups)

- Positive Psychology
- Diabetes prevention
- Primal/Paleo health coaching
- Autoimmune Coaching

Coaching for executives

- Wellness Coaching &

 Healthy Lifestyle solutions
 for specific segments
- Detox Programs
- Behavioral health
- Women's health (ex. menopause symptom management)
- Coaching for introverts

Longevity

Mental Health

Men's health

- Self-care behaviors and self-awareness
- Raw, Vegan, Vegetarian
 Coaching

Symptom & Disease Management

Hormone management Coaching for care-takers

Stress/anxiety

- Alcohol and
 Smoking Cessation
- Coaching through and after cancer

Acne/clear skin

Pain management

- Care transitions

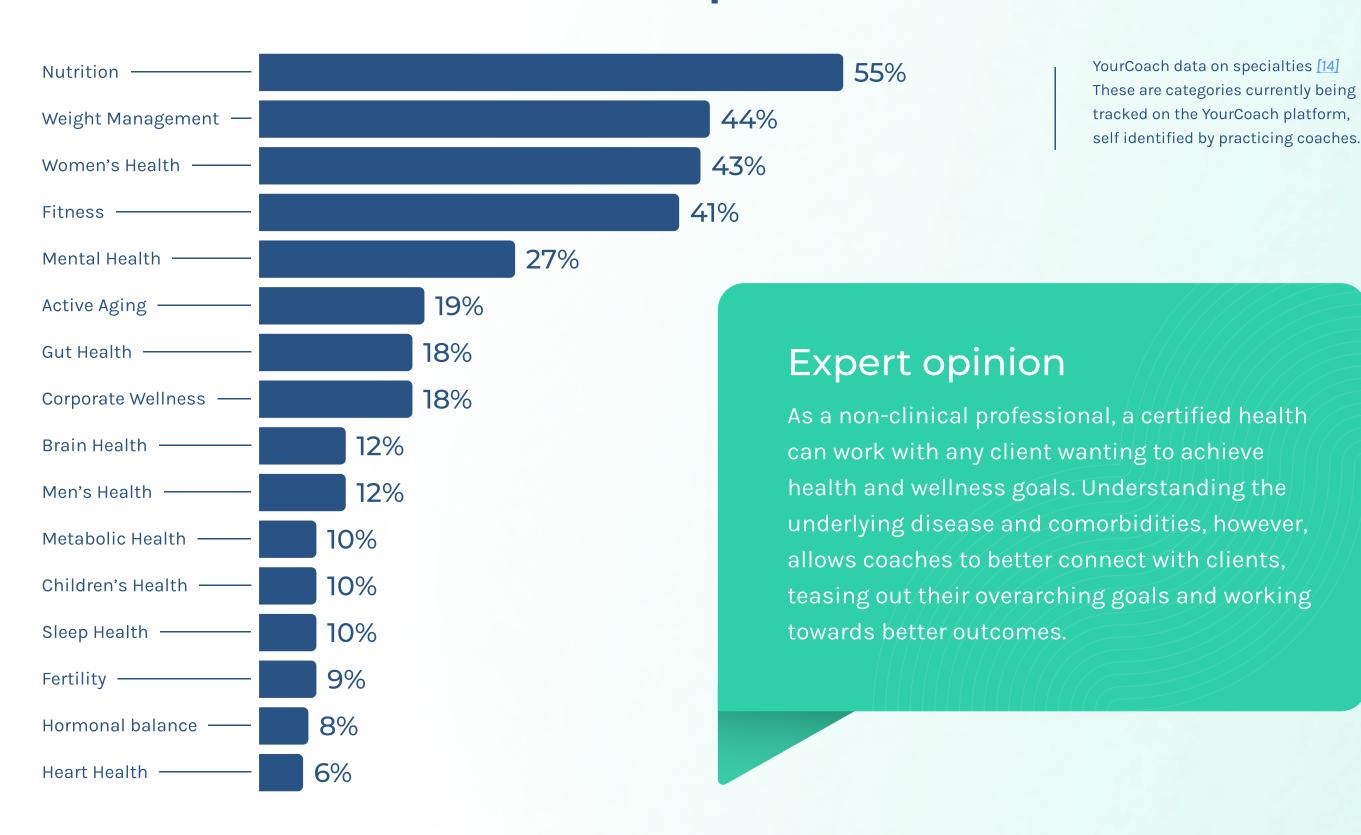
 Coaching around
 Eating Disorders
- Coaching through menopause

- Disease-specific coaching
- Diabetic Coaching
- Medication Adherence & Interactions

Insight: <u>Differences Between Dieticians</u>, Nutritionists & Health Coaches

Health Coaching Industry Report 2022 Introduction

YourCoach data on specialties



Health Coaching Formats

Sessions Format:



Video-based sessions

Synchronous, scheduled sessions with a client on a regular basis. The sessions can vary in length and are usually held bi-weekly or monthly, but can also be held weekly depending on the client's needs.



Text-based coaching

asynchronous or synchronous chat sessions between a coach and client.

Developing a long-term relationship with a health coach is highly preferred, as the coach acts as a guide to creating, following and completing a program that has been cocreated with the client. Health coaches adjust programs based on the clients' needs, results, achievements and struggles, and if they have a history of working together, it allows them to build an even more comprehensive program. While health coaching is highly personalized, there are some general trends in the industry regarding the typical format for sessions, length of programs and pricing.

Expert opinion

The chat-only option is a good option to use once the coach/client relationship has already been established, as even with technology advancements it's difficult to establish trust and rapport without first meeting face-to-face. It may also be difficult to use coaching techniques such as holding space for the client. Asynchronous voice messaging (which we offer on the YourCoach platform), is becoming increasingly popular, but the jury is still out on the effectiveness of chat-only coaching.

Health Coaching Industry Report 2022 Introduction

The length of a program varies greatly, based on the individual needs and goals of a client. Some goals may take longer to complete than others and programs are created accordingly.

Long-term goals

Long-term Goals are goals that will take the client an extended period of time to achieve (such as 3 months or longer) and tie into their wellness vision. This longer time-frame allows for meaningful progress, solidifying new habits, and experiencing the benefits of change.

Some examples of a long-term goal could be, "I will reduce my anxiety and find more joy in my day by starting every day with a 10-minute meditation" or, "I will improve my cardiovascular health by walking 10,000 steps daily." To reach these results, coaches help clients break larger goals down into achievable steps, or short-term goals.

An example of long and short-term goals on the YourCoach. Health platform

Main goal #1 Sustainable Habits Short-term goals + Add Put away devices 30 min before bedtime Coct 15 - Oct 23, 2020 Evening wind-down meditation Coct 15 - Oct 23, 2020

Short-term goals

Short-term goals are set for a shorter period of time, like weekly or biweekly, and allow the client to take small, manageable and meaningful steps towards achieving their long-term goals, thus building self-efficacy and confidence.

Examples of short-term goals could be, "Meditate upon waking for 5 minutes 3 days this week" or, "Walk 1 mile after dinner on Monday, Wednesday, and Friday". The client can modify these goals to help them edge closer to their long-term goal.

Insight

According to a study <u>conducted by Mayo Clinic on The</u>

Effectiveness of Wellness Coaching for Improving Quality of Life,

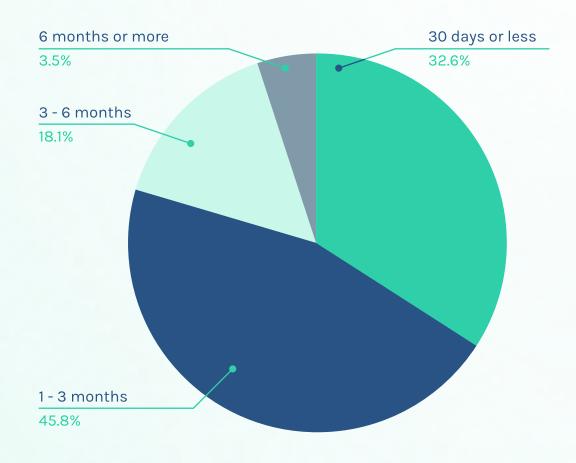
12 weeks is a sufficient period of time to see some results of wellness coaching. Study results demonstrated significant improvements at 12 weeks in all areas — overall quality of life, the five domains of Quality of Life, depressive symptoms, and perceived stress levels.

Health Coaching Industry Report 2022 Introduction

Duration

■ Data:

Duration of programs on the YourCoach platform



*The duration of these programs are set by individual coaches practicing with their own clients on the YourCoach practice management platform and do not reflect the YourCoach B2B offering.

Pricing

Price varies depending on the duration of the program, number of live sessions, experience level of the coach and specific specialties. Packages range from a per-session to monthly pricing structure dependent on which payment plan is offered and selected.

■ Data:

Average price set by coaches practicing on the YourCoach platform

Program duration	Average price	
30 days or less	\$275	
1-3 months	\$535	
3-6 months	\$830	
6 months or more	\$860	

*These prices and programs are set by individual coaches practicing with their own clients on the YourCoach practice management platform and do not reflect the YourCoach B2B offering.

Recent <u>2022 longitudinal observational study</u>, conducted during COVID-19 pandemic, shows that coaching is comparable to therapy in patient relationships and outcomes. According to the study, both groups that used teletherapy or telecoaching services through an employer-sponsored mental health solution reported high ratings and similar results in terms of therapeutic alliance.

Coaching and Psychotherapy

While there are some similarities between health coaching and psychotherapy there are also many differences. Drawing from the same research and approach, coaching and psychotherapy <u>are different</u> in training, client expectations, processes and structure. Depending on the client and their requests, professionals can and do work in tandem.

Similarities

Positive Psychology

Both health coaches and psychotherapists lean on learnings from positive psychology, where the focus is on the possibilities rather than causes and issues

Mindfulness

Both health coaches and psychologists may propose this practice to reduce stress, depression, anxiety or pain

Motivational interviewing

Motivational Interviewing, also known as OARS (Open-ended questions, Affirmations, Reflections, Summaries), is an evidence-based approach to behavior change and a guiding communication style. It is designed to strengthen personal motivation for and commitment to a specific goal by empowering the person's reasons for change within an atmosphere of acceptance and compassion [1]. This approach is relevant in both psychotherapy and coaching

Insight: Motivational interviewing 101

Differences

Structure

In psychology as well as health coaching, the individualized approach and flexibility in the workflow are essential, however, there are some core differences. In health coaching, the client always knows the session flow and what's coming next. Goal-setting techniques and action plans are the foundation of any coaching program.

In psychotherapy, each session may look very different depending on what is uncovered and what the goal of the session is.

Psychotherapy diagnoses and intervenes, while coaching evokes and mentors

According to APA (American Psychological Association), psychology's main purpose is "understanding the behavior". Psychotherapists diagnose and identify issues and conditions to be managed in therapy. They are carriers of essential and expert knowledge that can be shared with clients working with depression, trauma, various disorders and abuse. In health coaching (as a non-clinical profession), partnership & mentorship are key. The client is the expert, which puts the coach in a non-authoritative position. Coaches focus on facilitating the client's accountability process in defining their goals and action steps.

Education and Training

There is a significant difference between the length, intensity and methodology in training between health coaches and therapists, While psychotherapists hold a master's degree and hours of supervised clinical interventions, health coach training varies vastly from 6 weeks to graduate programs.

Health Coaching Industry Report 2022 Introduction

Similarities

Strengths-based Focus

The strengths-based approach comes from positive psychology and focuses individuals on self-determination and positive qualities, motivating and supporting them when challenges appear

Solution-oriented Focus

According to psychoanalyst Michael Bader, DMH, there is an understanding that therapists work with the past while coaches work with the future. In Bader's *opinion*, "good psychotherapy may be short term and have very clear goals, both behavioral and emotional", which makes it similar to goal-oriented coaching

Professional Conduct and Ethics

Both health coaches and psychotherapists hold to professional standards, principles and ethics.

Mental health professionals must be licensed by a regulating body and health coaches follow the code of ethics from NBHWC

Differences

Establishing Trust and Boundaries

Since therapists work with clients affected by conditions such as depression, anxiety, trauma, personality disorders, attention deficit/ attention deficit hyperactivity disorders and many others, it is essential "to help the person reduce the distress so as to enable the emergency of the new order" [2] - seeking and establishing a comfort zone and working within it is compulsory.

Health coaches, in their non-clinical role, may push clients outside their comfort zones by asking powerful and direct questions while remaining attentive, empathetic and sensitive once trust is obtained and established.

Client Expectations

Psychotherapy <u>is often stigmatized</u> as it is difficult for people to think about the presence of mental illness and acknowledge the need for intervention by a therapist. Normalization, recognition, support and empathy are essential for clients, while depth and interconnection between feelings, emotions, beliefs, past experiences and bodily health is expected.

Individuals usually seek a health coach once they recognize the need for change and need assistance in accomplishing their health goals. Motivation analysis, long and short-term goal setting, drawing up an action plan and transparency are expected. Somatic and/or psychological symptoms, relational problems as well as past trauma can be observed and should be addressed carefully and empathetically but not profoundly explored and diagnosed. "When in doubt, refer out!"

Health Coaching Industry Report 2022 ► Introduction

Working Together:

Psychotherapists and Health Coaches



The program introduces and develops students to the evidence-based approach and facilitates an understanding of what is needed to be part of an integrative care team and concepts of lifestyle medicine within healthcare systems



Lee Jordan Professor at Point Loma Nazarene University



Many people are ready for a change as the world is going through a huge awakening. There is a growing need for Health and Wellness Coaches in the world. The purpose of our course is to help students learn and develop coaching skills and techniques based on holistic theories. These new ways of looking at the connection between mind, body and spirit enable students to understand a more robust definition of selfcare, health & wellness



Not only do we include a full nutrition and coaching curriculum, we dig deeper into mental health and show our coaches how to address trauma in their clients' lives. What makes our program so impactful is that we offer a series of specialist certifications with a range of programs that prepare our graduates to create programs focused on everything from mental health, cancer, hormone health, weight loss, and autoimmune conditions

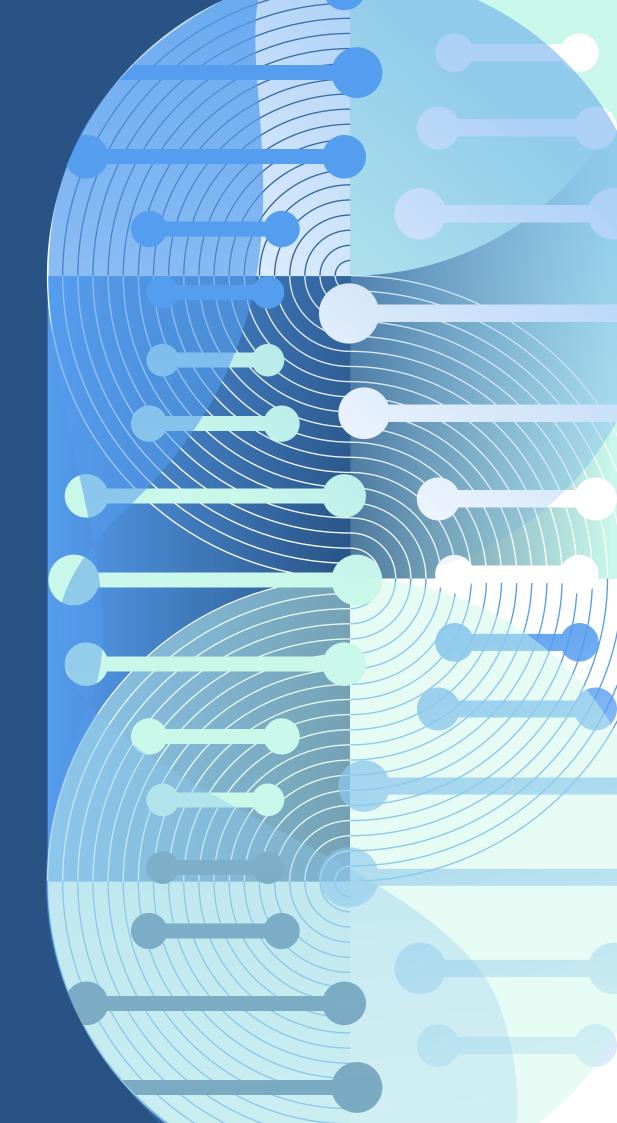


Cathleen Beerkens Founder of A Wellness Revolution



Cynthia Garcia Founder and CEO Institute of Transformational Nutrition

THE SCIENCE OF HEALTH COACHING



The Science of Health Coaching

Health coaching uses an evidence-based approach which can be used in both managing disease as well as a preventive method which leads to changes in nutrition, behavior, increased physical activity, self-acceptance, mental health improvements, enhanced quality of life, etc.

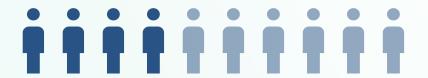
We have poured through numerous compendiums and individual studies on health coaching to bring you high-level results in a digestible format to show the overall positive impact health coaching has on an individual's health outcomes.



Chronic disease

Fact:

of diseases in the U.S. are chronic and lifestyle-driven



4 in 10 adults have two or more chronic health conditions, making chronic disease the leading cause of death and disability. While the trajectory of these diseases can be adjusted with lifestyle changes, patients often need guidance and support on this path.

According to a <u>compendium of research in the American</u> Journal of Lifestyle Medicine, "Health and wellness coaching is rapidly emerging as an adjunct treatment for lifestyle diseases... [It] holds great potential for advancing healthy behavior change and stemming the rising tide in prevalence of chronic disease". [3]

This section will summarize the findings from the compendium of health and wellness coaching studies (2000-2017) and other recent studies (2017-2022) on chronic disease management.

Oncology

Fact:

75%

of studies reported a decrease in fatigue and pain among cancer survivors with support from a health coaching practice [4].

Cancer is the

A nd leading cause of death in the US,

but many kinds of cancer can be prevented or caught early

16.9 million

22.2

January 2019

As of January 2019, there were an estimated 16.9 million cancer survivors in the United States

by 2030

million

Cancer survivors are projected to increase to 22.2 million

Health coaching proves valuable in improving psychological outcomes and improving the quality of life in cancer patients.

This may be particularly important since cancer patients experience a high prevalence of adverse psychological effects associated with the progression of the disease and treatment. Among 9 data-based studies from the compendium, 6 indicated an increase in favorable psychological outcomes (e.g., psychosocial outcomes, general mental health, quality of life)

4 studies suggested behavioral changes due to health coaching. In particular, one study indicated an increase in patient questioning their physician about their condition (autonomy)

2 observational studies indicated a positive change in nutritional behavior and one a change in exercise behavior with health coaching [3]

Another research analysis shows 9 of 12 studies reported statistically significant outcomes in decreased fatigue and pain among cancer survivors [4]

8 of 12 show significant changes in quality of life, acceptance, spirituality and increase in physical activity [4]

Cholesterol

Fact:

1 in 3

American adults have high cholesterol. 93% of studies claim health coaching is effective in LDL cholesterol management [3].



of American adults have high cholesterol [5]. High cholesterol puts one at risk for heart disease and stroke, two leading causes of death in the United States. Healthy People 2030 has focused on reducing cholesterol levels and increasing cholesterol treatment in adults.

According to the compendium, 13 of 14 studies reported favorable outcomes as a result of health and wellness coaching

The primary physiological outcome of health coaching is a **reduction in LDL** cholesterol, body weight (or BMI) and blood pressure

5 studies reported behavior change in nutrition and 4 studies change in exercise [3].

Another large study claims 42% of patients achieved a reduction of cholesterol with heath coaching vs 25% in the control group [6].

Diabetes

Fact:

of studies show a positive effect of health coaching on A1C improvement [3]

59%

claims health coaching helps lower weight [3]

37.3 million

people of all ages or

11.3% of the US population - have diabetes Type 2 diabetes of all affected



Type 2 diabetes is primed for health coaching, as it's a significant risk factor for other severe chronic conditions and can be managed or reversed through lifestyle modifications and health care interventions.

19 studies provide data with other **positive** outcomes (e.g., disease management, quality of life, medication adherence), including psychological variables such as self-efficacy and satisfaction [3]

A 2021 research study found that for adults with type 2 diabetes, a 12-month online health coaching intervention on glycemic control reduced A1C levels by an absolute amount of 1.8% while the control group (diabetes education) reduced levels by 1.3%

In another study, almost half of coached patients (49%) achieved their hemoglobin A1C goal [6]

<u>2021 RCT showed</u> a significant decrease of 0.62% in HbA1C for those patients receiving a health coaching intervention compared to 0.14% in the control group

Heart disease

Fact:

In the United States. someone has a heart attack every

91%

of studies on health and wellness coaching effectiveness reveal significant improvements [3].

people in the United States die from heart disease each year [5]



80%

Interventions that reduce risk factors such as high cholesterol, smoking, and physical inactivity could prevent as much as 80% of heart attacks and strokes.

Heart disease is the leading cause of death for people of most racial and ethnic groups in the United States [7].

11 of 12 studies on health coaching effectiveness in disease treatment reveal **significant improvements**

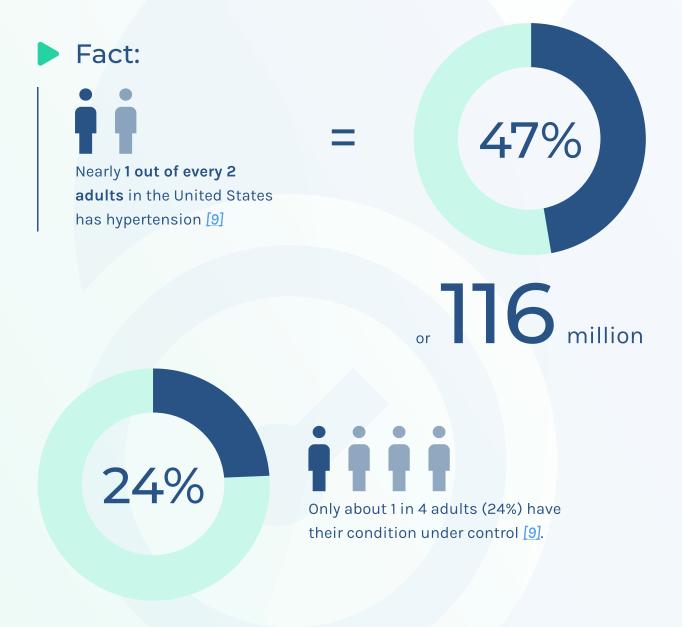
Studies show that the **health coaching group had an** overall lower risk of heart disease and other positive outcomes including improved healthy behaviors: better diet, increased days exercising and improved mental well-being, including lowered anxiety levels [3]

Analysis of 5 years of service delivery of The COACH Program by the Health Contact Centre <u>shows</u> statistically significant improvements in cardiovascular risk factor status were found across all biomedical and lifestyle factors in patients with CHD and/or type 2 diabetes. For both diseases, improvements in serum lipids, blood glucose, smoking habit and alcohol consumption combined with increase in physical activity were found

A 6-year study of cardiovascular patients who underwent The Coaching On Achieving Cardiovascular Health (COACH) Program <u>showed</u> an absolute reduction in all-cause mortality of 5.08%, and an average net cost saving to the funder of **\$12,115 per person** in those who received The COACH Program compared with those who did not

Study on the effectiveness of telephone-based health coaching for patients with chronic conditions showed a significantly reduced number of hospital admissions for a group of patients with heart disease

Hypertension



High blood pressure is influenced by risk factors that can be changed such as smoking, obesity, physical inactivity, poor diet, and excessive alcohol consumption and can be successfully prevented. Studies have shown that medications alone are not effective in the management of hypertension. 2017 study claims health coaching affects the reduction of both systolic and diastolic blood pressure and describes coaching as a 'promising approach' in hypertension management

According to the compendium, 7 of 9 studies on hypertension found a **positive impact** of coaching on tracking weight/BMI

5 of 6 studies found positive changes in nutrition behavior as a result of coaching. Perceived quality of care, medication adherence, avoidable hospitalizations, and cost savings as a result of coaching were other outcomes addressed in studies with hypertensive patients [3]

Pilot study completed in 2020 shows how student health coaches can improve both patient adherence and health status when paired with Remote Patient Monitoring

Obesity

Fact:

of studies show a positive effect of health coaching on weight reduction and/or BMI [3].

42% of American adults aged 20 and over are obese.

A recent study shows that half of the U.S. population will be obese by 2030.

Obesity is linked to more than 60 chronic diseases, including hypertension, type 2 diabetes, heart disease and stroke, sleep apnea and breathing problems, some cancers and mental illnesses such as depression and anxiety. A recent study shows that half of the U.S. population will be obese by 2030.

28 of 32 health and wellness coaching studies found a positive effect on weight reduction and/or BMI

11 of 15 studies found a positive effect of coaching on exercise activity, while 6 of 9 reported positive changes in **nutrition behavior** [3]

2019 study on primary care-based health coaching showed 12 months of coaching intervention mean loss of 7.24% initial weight in overweight and obese adults with costs of \$288.54 per participant over 1 year

Alcohol & Tobacco Addiction

Fact:

Binge drinking is most common among younger adults aged

18 - 34

as common among men than women. [18]

Drinking heavily and regularly is associated with symptoms of depression, anxiety, and can decrease generalized well-being. 2020 cross-sectional survey of U.S. adults showed that 60% of participants reported that their drinking had increased compared to before COVID-19.



One in six US adults binge drinks, with 25% doing so at least weekly [18]

In 2020, nearly 13 out of every 100 U.S. adults aged 18 years or older (12.5%) smoked cigarettes

More then 16 million Americans live with a smokingrelated disease [19]



According to the compendium, half of the studies on smoking cessation reported positive changes for coaching participants. One study revealed that those who worked with a health & wellness coach showed a higher quit rate than those receiving only health education [3]

A systematic review of peer recovery support services showed that those who struggle with alcohol abuse experienced reduced substance use, better recovery outcomes, and lower relapse rates when working with a health coach

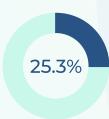
Fundamental study on tobacco cessation and health coaching impact showed that participation in health coaching programs brought success rate to 73% with the highest quit rate after 6 months of participation - 77%!

Wellness

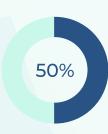
Fact:



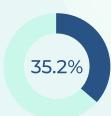
Only about one in 10 adults met recommendations for fruit and vegetable intake according to latest study.



A 2020 telephone interview survey conducted by CDC reported that one in 4 adults in the U.S. (25.3%) is physically inactive



Almost half of all Americans say they feel sleepy during the day between three and seven days per week.



A third (35.2%) of all adults in the U.S. report sleeping on average for less than seven hours per night.



The 2022 poll by Gallup shows that 85% of U.S. adults said they were satisfied with their personal life, five points shy compared to the 2020 record-high point.

According to the compendium, 92% of studies show a positive effect of health & wellness coaching on exercise behavior, 88% on nutrition behavior, and 71% on weight/BMI outcomes [3]

A 2017 systematic review of 27 RTCs on physical activity among older population and health coaching effectiveness found that health coaching significantly increased physical activity in people over 60 years of age, which is beneficial for preventing chronic disease and maximizing independence in older adults

A 2019 study found that health coaching was successful in increasing obese adults' enrollment in weight management programs and that "there was a dose response" relationship for weight and behavioral outcomes".

A 2021 randomized-controlled trial showed that a 6-month health coaching intervention improved quality of diet and increased daily vegetable intake

<u>Another study</u> with a goal to examine the effect of health coaching on changes in healthy behaviors, found direct improvements in life satisfaction and optimism among participants. More importantly, "indirect effects of coaching on these variables concurrently and over a one-year time lag were also supported"

Mental Health

Fact:



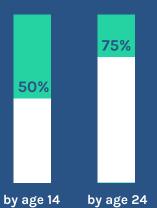
There is a shortage of mental health professionals



In January 2022, the Centers for Disease Control and Prevention (CDC) reported that almost a third (29%) of U.S. adults were experiencing symptoms of anxiety or depression.



According to 2021 data, 37% of the U.S. population were living in areas experiencing a shortage of mental health professionals.



New data from Sapien Labs' May 2022 Rapid Report, based on 48,000 responses of young people aged 18–24 across 34 nations, reveals that nearly half of young adults experienced mental health decline during the pandemic's second year. 50% of all lifetime mental illness begins by age 14, and 75% by age 24. The 2nd leading cause of death among people aged 10-34 in the U.S. is suicide.

2019 study aimed to examine the effect of coaching and weekly recommendations delivered digitally on depression, anxiety, and app use prove coaching effectiveness in anxiety reduction and improvement in depression symptoms

Clinical research conducted by Modern Health reports that almost half (47%) of employees with depressive-related symptoms experienced clinical recovery in well-being after virtual health coaching interventions. Other outcomes include burnout and presenteeism reduction

Results from a 2021 study, which included 1496 participants from the U.S., shows strong results in decreased symptomology for clients with moderate levels of anxiety and depression during initial weeks of coaching

<u>2021 longitudinal study</u> demonstrates the effectiveness of virtual professional coaching in improving psychological wellbeing and increasing life satisfaction, self-awareness, self-efficacy, social connection and emotional regulation among participants

Recent study <u>Effectiveness of Evidence-Based Telecoaching Delivered</u> Through an Employer-Sponsored Mental Health Benefits Platform, published April 2022, confirms the significance of telecoaching on employee mental health that was delivered as part of an employersponsored platform. Participants showed clinically relevant improvements in well-being, a decrease of 21% in burnout, and significant reductions in presenteeism and absenteeism

Mental Health and Suicide Prevention

in the Veterans Administration

Fact:

Multiple studies prove the effectiveness of health coaching for veterans in suicide prevention, mental health, stress management and increased quality of life.

Two recent pilot studies showed the effectiveness of health coaching in suicide prevention for veterans by proposing a program with health coaching intervention and a postintervention measurement for Post-9/11 veterans.

Among other positive results:



increases in psychological well-being



improvements in mental health

The results are supported by both quantitative and qualitative data. [20, 21]

A 2021 study with the purpose to examine the impact of the VA Whole Health Coaching program **showed** significant improvements over baseline in mental health, stress, and perceived health competence. Other results related to participants' feedback contain positive assessments of both effective program components and improvement opportunities.

While future research is desired, 17 clinical trials are ongoing with 'Recruiting' status on 'veterans' and 'health coaching' and 43 completed studies

of which with results proving health coaching effectiveness in maintaining psychological health and managing mental health outcomes. Studies also suggest that health & wellness coaching has a "positive impact on mental health outcomes and utility for a wide range of mental health concerns". Results of the 2021 study show health coaching is associated with increased and sustained goal achievement in some veterans with PTSD.

	Telephone based Motivational Coaching sessions	Standard of care
Overall Number of Participants	140	140
Depression (scores 0-27)	9.4	11.1
Anxiety (scores 0-4)	1.2	1.3
Panic (scores 0-4)	0.6	0.7
PTSD (scores 0-80)	25.1	29.7
QOL psychological health (4-20	13.4	12.7
QOL social relationships (4-20)	13.3	12.1

Motivational Coaching to Enhance Mental Health Engagement in Rural Veterans Randomized clinical trial, 2019

Health Coaching Industry Report 2022 > The Science of Health Coaching

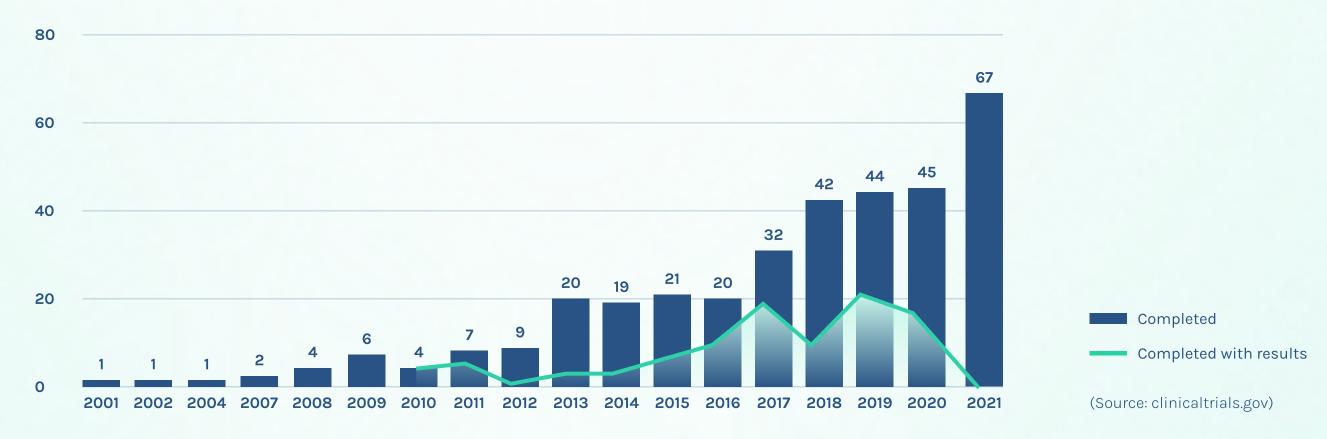
■ Data:

464

clinical trials with health coaching interventions have been completed and published in the last 20 years in the U.S. [16]

In clinical trials, health coaching is on the rise: the number of completed studies increased from 7 in 2011 to 67 in 2021!

Completed clinical trials with **health** coaching interventions by years



Select completed studies 2020-2021

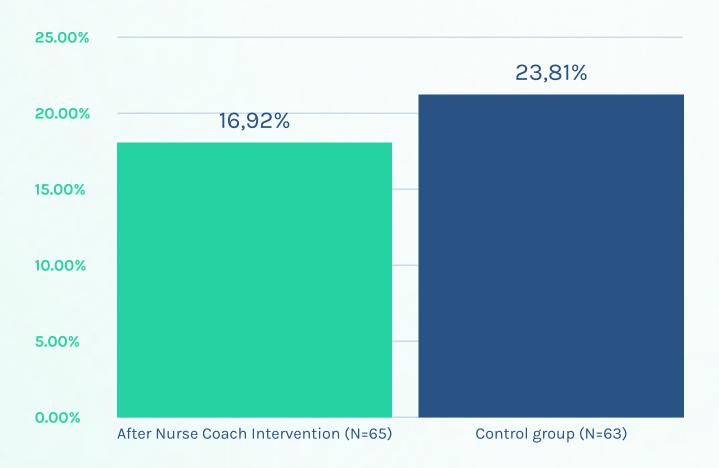
Study	Conditions	Interventions	Results Posted	Locations
A Mobile Intervention to Reduce Pain and Improve Health (MORPH)	A Mobile Intervention to Reduce Pain and Improve Health (MORPH)	Behavioural: MORPH	01/22/2021	Wake Forest Baptist Medical Center Pain Center Winston-Salem, North Carolina, United States
Engagement With an Adaptive Mobile Health Smoking Cessation Intervention	Chronic Pain Obesity Sedentary Lifestyle	Behavioral: Proactive telephone coaching	03/10/2022	Massacusetts General Hospital Boston, Massachusetts, United States
Social Media Intervention for Cannabis Use in Emerging Adults	Tobacco Use Cessation Cannabis Use	Behavioral: Social Media Intervention	02/11/2022	University of Michigan Ann Arbor, Michigan, United States
Intervention Study In Overweight Patients with COPD	Pulmonary Disease, Chronic Obstructive Obesity Weight Loss	Behavioral: Lifestyle Intervention	02/9/2022	Birmingham VA Medical Center University of Alabama at Birmingham - UAB Lung Health Center University of Arizona (and 36 more)
Personal Resilience Empowerment Program Study	Lung Cancer Cholangiocarcinoma Pancreatic Cancer Liver Cancer	Behavioural: Personal Resilience Empowerment Program including 5 sessions with health coaches	10/15/2021	Hackensack Meridian Health - Jersey Shore University Medical Center Hackensack Meridian Health - Riverview Medical Center Red Bank, New Jersey, United States

■ Data:

250

clinical trials with health coaching interventions are recruiting participants in the United States [17].

All-Cause Mortality



Highlight of "Telehealth-based Strategies to Increase Oral Chemotherapeutic Agent Medication Adherence"

The initial results are in! Randomized longitudinal study with a goal to improve cancer patients' adherence to oral chemotherapy <u>shows positive results and reduced mortality risk</u> rate for the group with health coaching intervention by nurse coaches compared to the control group. The nurse coach intervention involved individualized barrier/facilitator screening tools, educational tools, and regular contact with cancer patients via telephone calls during a six-month period.



Select Ongoing Studies

Study	Conditions	Interventions	Results Posted	Locations
Mechanistic Effects of Health Coaching to Reduce COPD Hospitalizations	COPD Emphysema	Behavioral: Health Coaching	07/05/2018	Mayo Clinic in Rochester Rochester, Minnesota, United States
Health Coaching for Chronic Multisymptom Illness	Pain Predominant Chronic Multisymptom Illness	Behavioral: Health Coaching Behavioral: Supportive Psychotherapy	04/30/2020	East Orange Campus of the VA New Jersey Health Care System, East Orange, NJ East Orange, New Jersey, United States
Evaluating the Feasibility of a Digital Health Coaching Program for Individuals Following CAR T Therapy	Lymphoma, B-Cell Leukemia (and 4 more)	Behavioral: Digital Health Coaching	03/11/2022	The University of Texas MD Anderson Cancer Center Houston, Texas, United States
Real World Insights During Treatment for Relapsed/ Refractory Multiple Myeloma With Isatuximab	Multiple Myeloma Refractory Multiple Myeloma	Behavioral: Digital Health Coaching Program Device: Fitbit	06/17/2022	The University of Texas MD Anderson Cancer Center Houston, Texas, United States
Coaching Intervention for Caregivers of Persons With Stroke	Caregiver Stress Syndrome Caregiver Burnout Stroke, Acute	Behavioral: Coaching	24/08/2020	Thomas Jefferson University Philadelphia, Pennsylvania, United States

Other recent study results

2019 study on improving low back pain reported improvement in pain outcomes ranged 52-64% and disability outcomes 31–55% for a group using 12-week digital care program including health coaching

2022 pilot study on health coaching prevention Alzheimer's Disease aimed positive trends in reducing AD risk factors for low-income, diverse older adults

2019 systematic review and meta-analysis of RCTs of health coaching for people with COPD showed that health coaching has a significant positive effect on Health-related quality of life (HRQOL) and helps to reduce costly hospital admissions

Recent 2022 randomized study showed that remote patient monitoring with health coaching improved quality of life, self-management, daily physical activity, sleep and depression scores in patients with COPD

2020 study in Germany claims telephone-based health coaching is statistically 'significantly superior' to control group with usual care in physical activity in hours per week, metabolic rate per week, BMI, measuring blood pressure and health literacy

Another randomized controlled trial study, published
2020, reported a greater number of days of
adherence compared with usual care after 9 months
of health coaching interventions for patients with
COPD. The intervention group also were more likely
to have used their controller inhalers as prescribed

KEY PLAYERS AND ENVIRONMENT



COACHING ASSOCIATIONS AND INSTITUTIONS

Association	Description
The National Board for Health and Wellness Coaching	NBHWC is overseen by a board of directors, and supported by committees composed of volunteers and staff members who seek to advance the profession of health & wellness coaching. Since 2010, NBHWC has consulted widely, developed a broad consensus, created national standards, and formed a partnership with the National Board of Medical Examiners in order to launch a National Board Certification for Health & Wellness Coaches.
The National Commission for Health Education Credentialing	NCHEC is a nonprofit organization whose mission is to enhance the professional practice of Health Education by promoting and sustaining a credentialed body of Health Education Specialists. To meet this mission, NCHEC certifies Health Education specialists, promotes professional development, and strengthens professional preparation and practice.
<u>National Society</u> <u>of Health Coaches</u>	The National Society of Health Coaches is dedicated to advancing the use of Evidence-based Health Coaching (EBHC)® in clinical practice. The society offers independent study, online testing, and certification programs.
<u>International Association</u> of Health Coaches	Based in Washington, D.C., this association is the largest Health and Wellness Coach alliance globally. Advocacy for Health Coaches, liability insurance for independent Health Coaches, and information on health policies are offered through the association.
Health Coach Association of North America	As a non-profit education association, the organization offers associate, professional, and education-based memberships.
National Association of Nutrition Professionals	NANP is the only professional business league dedicated to advancing holistically trained nutrition professionals.
Institute of Coaching Professional Association	In addition to an annual conference, the association provides research grants, discussion forums, and a monthly coaching report.
The American Coaching Association	As part of its mission, the American Coaching Association links coaches who work across specialties to each other.
International Consortium for Health & Wellness Coaching	Science-based training, coaching knowledge, and assessment of existing Health Coaching skills are offered.
<u>National Institutes of Health</u>	Grants and funding, community resources, and information on clinical research trials are services that the National Institutes of Health offers.

Coaching Schools and Universities

113 training programs are approved by the NBHWC [10]

As the profession continues to evolve and become more integrated into the traditional healthcare system, it is increasingly important for future Health coaches to secure an education from a program approved by the National Board for Health & Wellness Coaching (NBHWC). The NBHWC provides standards for practice and measures of success for the health coaching profession.

Sampling of accredited academic credit programs

Post-Baccalaureate Certificate California Institute University of Minnesota, Center M.A. degree of Integrative in Integrative Health and Well-**Health Studies** for Spirituality and Healing of Integral Studies Being Coaching The Ohio State University Bachelor of Science in Integrative Health **University of Portland** Health and Wellness Coaching Program Main-Campus Health and Wellness Minor in Health and **Arizona State University Illinois State University** Coach, Certificate Wellness Coaching MS, Health Education **Point Loma Nazarene** Master of Kinesiology University of Utah Specialist & Wellness in Integrative Wellness University Coaching Master of Science in Masters of Science in **University of West Georgia Creighton University** Integrative Health and Integrative Health and Wellness Wellness (IHW)

We admit a class of 15 to 20 students each fall. Those students are 90% master's students versus certificate students. The certificate students take two years, and the master's students can take anywhere from two and a half to four years to get through



Karen Lawson, MD University of Minnesota, Center for Spirituality and Healing



The curriculum is designed to provide knowledge as well as an emphasis on skill-building. Students take courses related to program planning, program evaluation, individual and group behavior change, various aspects of the domains of health, theories of behavior change, and a per-semester practical skills course



Kate O'Farrell University of Utah, Department of Health and Kinesiology

Sampling of accredited academic non-credit programs

Duke Integrative Medicine

Duke Health & Well-Being Coach Training

Georgetown University Institute for Transformational Leadership

Certificate in Health and Wellness Coaching

Health Leadership and Learning Network, York University

Health Coach Professional Certificate

The Ohio State University

Health & Wellness Coaching Graduate Certificate

Southern Adventist University
School of Nursing

Health Coaching for Health Care Providers

ealth Care Providers

66

We have added a second class each year, and trained a total of 38 students in 2021. We are estimating to have 30 students in the class that starts in May 2022 and we also increased the number of trained mentor-supervisors



We are seeing our graduates take both a full-time employment role, perhaps within healthcare settings or private companies who provide health coaches to their employees, and as a self-employed coach

Andrew Weil Center for Integrative

Medicine, University of Arizona

University of North

Carolina Greensboro

Maryland University

of Integrative Health

Vanderbilt University

Medical Center

Emory University



Robert L. Crocker, MD

Andrew Weil Center for Integrative
Medicine, University of Arizona



Dina LumiaDuke Health & Well-Being Coach Training

Health Coaching Industry Report 2022 **Key Players and Environment**

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Integrative Health and

Wellness Coaching

certification program

Health Coaching Program

MUIH PBC in Health and

Wellness Coaching

Vanderbilt Health

Coaching Program

Health and Wellness

Coaching Certificate

Sampling of accredited private sector programs

Health Coach Advanced Wave Coach Training American Council on Exercise (ACE) Wave Training Program Program The Integrative Women's Women's Health Master Health Dr. Sears Wellness Institute **Health Institute** Coach Certification Coach Certification **Institute of Transformational Certified Transformational** Professional Wellness & **Real Balance Nutrition** Health Coach Certification Nutritional Coach (CTNC) **Functional Medicine** Health Coach Pack Health Coaching Training Programs Coaching Academy Certification Program Primal Health Coach Institute **Primal Health Coach Institute** Wellcoaches Core Coach Training Program Master Coach Certification



We have 3,000 graduates per year and they put our certification to a variety of uses. From stay-at-home moms using their certification for supplementary side incomes to full-time coaches with lucrative endorsement deals and product lines



About 10% of our graduates are self-employed or have the goal of becoming self-employed in the near future. 80% of our graduates are employed by an employer. For about 10%, employment status is unknown



Cynthia Garcia Founder and CEO Institute of Transformational Nutrition



Michael McMorris Pack Education

Career Paths for Health Coaches

■ Data:

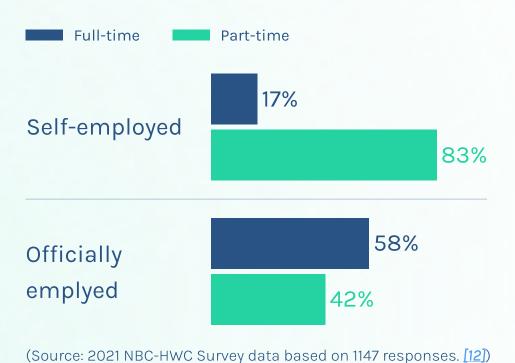
2021 NBC-HWC Survey reveals that

69% 52%

of health & wellness coaches in the U.S. are self-employed

of National Board Certified coaches are officially employed (not self-employed)

Types of employment and practice





I would say a good half of our students go into private practice or some version of private practice. About half go into employed situations. Some do a combination of the two. Some that work in fitness centers, some in senior living, we've had some with a specialty interest in hospice, or actually in adolescent work. Some in educational settings, like college campuses. So it's a pretty varied range and expanding all the time.



Karen Lawson, MD University of Minnesota, Center for Spirituality and Healing



Our certified graduates typically take one of three paths: (1) use their coaching skills as another tool in their work as a medical practitioner; (2) Start their own private coaching practice; (3) find a job working for another entity (some of these include integrative medical practices, hospital systems, organizations such as YMCA, fitness clubs, and corporations working as an employee wellness advocate).



Robert L. Crocker, MD Andrew Weil Center for Integrative Medicine, University of Arizona



Since our program draws a wide student base with a varied professional background - health coaches, nurses, occupational therapist, personal trainers, human resource professionals and career changers - to name a few, our alumni are using their Integrative Health and Wellness degree in a variety of ways. Some use the new skills to further the work in their current career. For example, a nurse became a nurse health coach in a medical setting. Others become health coaches, work in community or workplace wellness positions, or start their own health coaching practice.



Vicki Bautista **Creighton University**

Private Practice

Health Coach-Preneurs are drivers of change in the health and wellness industry. At YourCoach, we coined the term

"Health Coach-Preneur"

to represent health and wellness coaches building their own practice leveraging their knowledge, unique skill set, niche and experiences to address client needs. Every Health Coach-Preneuer has something unique to bring to the table and each one is a critical member of the Health Coaching Revolution—an endeavor to deliver the power of health coaching to the global population!

As independent business professionals, Health Coach-Preneurs control their hours and schedules, with the flexibility to work part-or full-time, depending on client load and capacity. They may practice with clients they've sourced independently, or, if they are practicing on the YourCoach platform, they may become eligible for new client opportunities with our industry partners.



Graduates go on to work as employees
(health and wellness coaches) or launch
their own health and wellness coaching
practice or a combination of both. Some
work in education or for organizations such
as the National Board for Health and
Wellness Coaching and the American
College of Lifestyle Medicine. Still, others
are working in technology, helping shape
ways to deliver non-pharmacological health
and wellness solutions for mass
consumption. All share one thing – a
passion to help others become their fullest,
thriving selves.



Lee JordanProfessor at Point Loma Nazarene University

Why become a Health Coach-Preneur?

Simply put, Health Coach-Preneurship affords

flexibility, opportunity, and independence.

These health coaches decide how many clients to take on, can make their own schedules, and can have the freedom to ramp up their client caseload and scale it back as they need or desire. This adaptability is important and makes caring for themselves and others more possible, especially when priorities may shift.

We've always been inspired to support Health Coach-Preneurs, but especially now as health and wellness coaching has become a key ingredient in health and care teams and digital health, surrounding digital products and services. Health Coach-Preneurship ensures coaches have a buffer to be able to diversify their streams of income based on the number of clients they take on. Practicing coaches on the YourCoach platform have more opportunities than anywhere else to work with new clients through our industry partners (more on that below!).

What opportunities does YourCoach have to empower Health Coach-Preneurship?

Our team works hard to empower every practicing health coach on our platform to do more of what they do best—coach!

We offer opportunities to support their business from the very early stages—for example, our *Rita and Gene Presman Memorial Scholarship*Program awards 15 ambitious coaches with funds and exam prep for the NBC-HWC exam each year. We also produce regular webinars that are eligible for CEUs once they become NBC-HWCs.

Insight: Here at YourCoach, we're big on authenticity. We don't just talk the talk—we've worked hard to empower health coaches with new client opportunities, scholarship opportunities, webinars and more through our end-to-end, HIPAA-compliant practice management platform.



While coaches run their practice, we offer superior tools on our HIPAA-compliant end-to-end practice management platform, like full video and chat capabilities, goal-setting features, a library full of their proprietary content, direct access to digital therapeutics tools integrated into the platform, and so much more. We also provide practicing coaches on our platform opportunities for contract work through our industry partnerships. We have more opportunities for Health Coach-Preneurs than anywhere else as the only operating system for behavior change, powered by health coaches!

Health Coaching Industry Report 2022 **Key Players and Environment**

Corporate Practice

This past year, we've experienced what many are deeming "The Great Resignation," (sometimes called "the Big Quit") featuring the largest workforce mass exodus in decades. Spurred on by the pandemic, but not caused by it, it resulted in 4.53 million workers quitting their jobs in March 2022, setting a new record. Majority of workers who quit jobs in 2021 voiced that:

low pay 63%

no opportunities for advancement 63%

feeling disrespected at work 57%

and childcare issues 48%

were reasons for quitting, according to Pew Research survey conducted in February 2022

A new trend emerged, called "quiet quitting", which is not about quitting at all - the term is new and on everyone's mind. Instead of unpaid overtime or working outside the 40-hour week, an employee chooses to do only the bare minimum rather than go above and beyond and only do what they're getting paid for within the workweek constraints.

Quite quitting is a response to workplaces that were unprepared for the pandemic and the Great Resignation and is often used as a protective mechanism against burnout. Polling company Gallup <u>found</u> that at least half of Americans fit within the definition of quiet quitting. According to the latest Gallup data, the proportion of actively disengaged U.S. employees increased to 18%. In another survey, released by Gallup in March 2022, only 24% of Americans thought their managers had their best interests at heart.

How health coaches can help employees:

- Guide employees in defining their goals (personal and professional), aligning on tactical strategies
- Help impact meaningful changes
- Help prevent employee burnout
- Empower individuals to find sense of purpose
- Help employees stay on track during health changes and challenges
- Help regain control over work-life balance
- Provide support

How health coaches can help organizations:

- Increase employee engagement
- Promote a healthy corporate culture
- Help create added value in the workplace for employees
- Help strengthen the corporate brand on the market

Corporate Practice

Health coaching is the next frontier in personalized health offerings. We predict that more companies will incorporate health and wellness coaching into their benefits programs in 2023.

■ Data:

of National Board Certified coaches work primarily for for-profit entities [12]



In many ways, health coaching as a career offers a rebuttal to the conditions and structures that are driving quiet quitting and the Great Resignation as a whole. Particularly in many corporate settings, the work environment is physically and emotionally unhealthy; it is no surprise so many employees are experiencing burnout and fleeing for greener pastures (or just fleeing the workforce, period). Health coaching is unique among careers in that it offers practitioners a very real chance to be the change they wish to see in the world of work

Insight: Eligible coaches practicing with their own clients on the YourCoach platform, can become eligible for additional opportunities through our industry partners



Sandra Scheinbaum Ph.D., Founder and CEO, The Institute for Functional Medicine in an article for Forbes Business Council

Digital Health Companies

The emerging world of digital health offers coaches new career opportunities and a chance to innovate from within digital therapeutics companies. Health coaches are integral because they make health tools feel more approachable and accessible to clients – they create meaningful plans that integrate digital tools to meet their goals. Any healthcare intervention is only effective if it's being regularly utilized. Coaches are key in making this happen.

Expert opinion

The expertise from coaches is in high demand across digital therapeutics companies like
Twill, Feel Therapeutics, Oshi, Virta Health,
Femmistry (just to name a few) because
coaches understand meaningful and effective
intervention strategies. We're seeing more and
more coaches surrounding digital health and
digital therapeutic offerings while still
managing their own practices to maintain
their edge and creativity



Care coaching at Neura Health is very similar to the idea of health and wellness coaching, by essentially bringing health and wellness coaching into the medical practice. These coaches are integral members of the support team, working with medical practitioners to optimize individual care plans and health outcomes in every patient's individual journey to relief. At Neura Health, we understand that coping with chronic conditions like headaches and migraines can be an isolating experience. Having a care coach provides an unprecedented level of support, so that patients feel listened to and honored in their needs as they work towards experiencing relief



Cary Sears
Head of Care Coaching
at Neura Health

Primary Care

Health coaches are a core part of primary care teams, working in tandem with providers and other professionals to provide the best care possible. In the short term, it gives patients support and confidence, and the longterm effect is <u>preventing and reducing</u> the severity of future health issues.



Health coaching should be an integral part of primary care. It helps patients better manage chronic conditions like diabetes and hypertension and improves outcomes. As a primary care doctor, I'm focused on diagnosis, treatment and a lot of their medical issues. It's great to have health coaches available to help patients make needed changes and sustain them over time



Dr. Russell S. Phillips director of the Harvard Medical School Center for Primary Care [13]

Health Insurance Companies

Health insurance companies obviously prefer to keep subscribers healthy. Healthy people have fewer claims and optimize a plan's long-term value. There is still much to be done in this effort, especially as payors increasingly explore the impact of health coaching specialties and services.



Educational settings

According to the <u>Centers for Disease Control and Prevention (CDC)</u>, the prevalence of obesity in children aged 2-19 in 2017-2020 was 19.7% and affected 14.7 million children and adolescents. Among younger adults, the situation is more dire: according to Johns Hopkins research, published in <u>JAMA</u>, over half of young adults are obese or overweight. The younger population suffers from complex health issues, including mental health. Statistics show that <u>50%</u> of all lifetime mental illness begins by age 14, and 75% by age 24.

■ Data:

12%

of National Board Certified coaches work in educational settings [12]

School and university administrators are realizing the harmful long-term and short-term effects of poor diet and mental health issues on students' capacity to learn and reach their full potential. Health coaches are being employed to consult on healthier menus and school environments, offer support and hold one-on-one consultations with students in order to help with the various health-behavior issues. They are helping students with healthy body image, stress management, healthy habits, social connections, emotional regulation and self-esteem.

Health and Wellness Solution Providers

Health and wellness solution providers such as gyms and fitness studios recognize that there are a number of core benefits health coaches can offer their clients - especially virtually. For instance, health coaches can provide complementary services such as habit and lifestyle change education, health & wellbeing education and help clients to reach physical health goals.

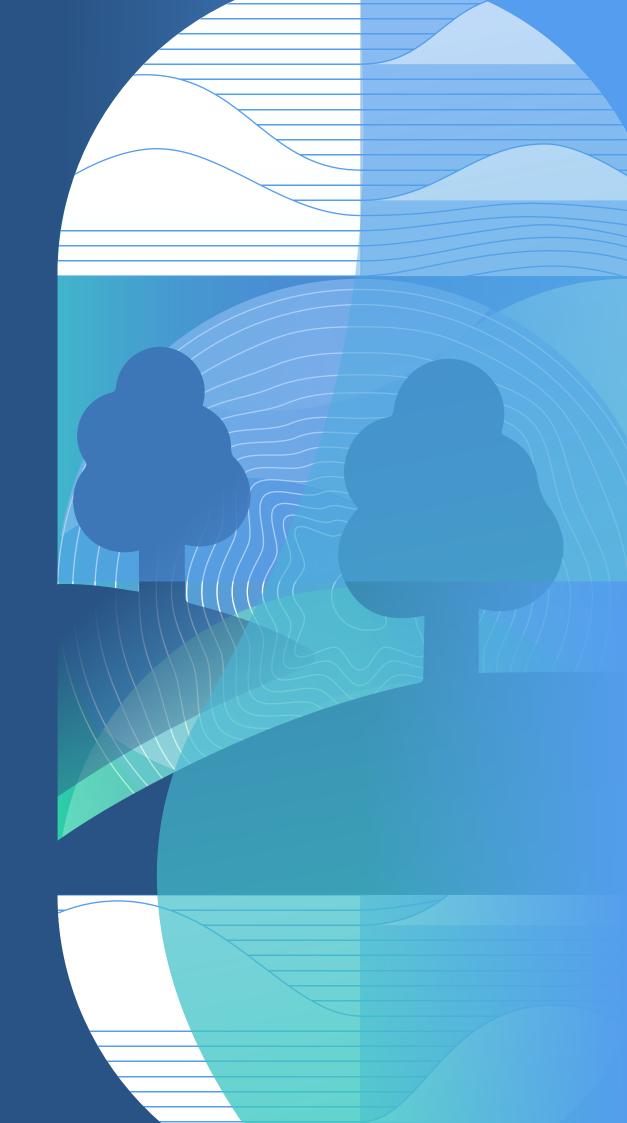
■ Data:

5%

of National Board Certified coaches work primarily at wellness/fitness centers [12]

These career opportunities are only a sample of the possibilities available to health coaches and in which coaching niche becomes increasingly important. Other institutions that employ health coaches include community clinics, specialty healthcare companies, spas, health food stores, workplace health programs, schools, universities, and other state, education and reform initiatives.

CURRENT MARKET LANDSCAPE



Market Size and Growth Rates

■ Data:

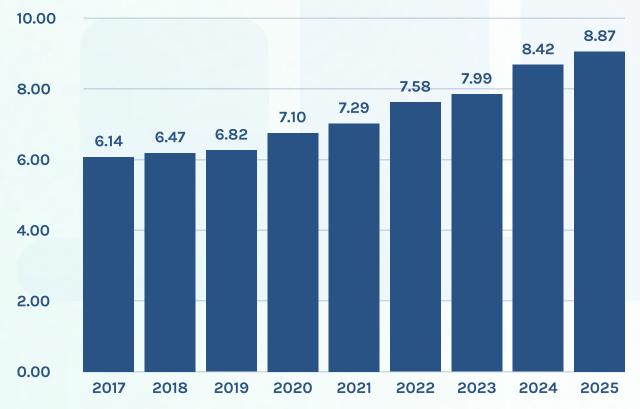
2018 and 2021 Heath Coaching Market Reports by Marketdata.

Fact:

60%

of Americans want health coaching but 80% of them have never had it offered to them [15]

U.S. Health Coaching Market Size (USD Billion)



Research by Marketdata estimates that the total U.S. Health Coaching market in 2020 was worth \$7.1 billion, which was up 15% from 2014. The market is forecast to grow at a 2.7% pace in 2021 and 5.4% per year thereafter, reaching \$8.87 billion by 2025.

There are an estimated 128,000 U.S. health coaches in the U.S. according to Market data's 2021 report, *The U.S. Health Coaching Market*. From 2006 to 2019, their number grew by 9% on the year to year basis. With the same growth rate, it is estimated there will be almost 140,000 coaches in the US alone by the end of 2022.

U.S. Corporate Wellness Market

Fact:

60% of employees

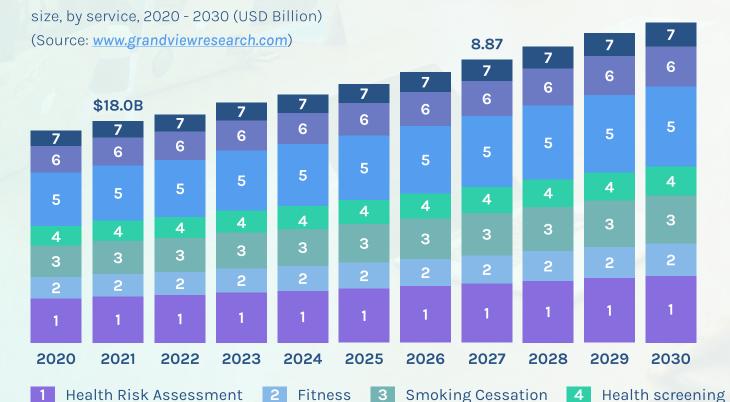
state that corporate wellness programs have made them opt for a healthy lifestyle outside of the office as well

3.8%

U.S. Market CAGR, 2022 - 2030

(Source: www.grandviewresearch.com)

U.S. Corporate Wellness Market



The U.S. corporate wellness market size was valued at \$18.0 Billion in 2021 and is expected to expand at a compound annual growth rate of 3.77% from 2022 to 2030. According to Grand New Research, the reduction in the overall healthcare costs of an employee and the increasing onset of chronic diseases are expected to boost this growth.

According to 2021 The Market For Self-Improvement Products & Services Report, conducted by Marketdata, the selfimprovement market, which also positively correlates with the health coaching market, was worth \$10.5 billion in 2020 and is estimated to grow a 6.0% average annual growth to \$14.0 billion by 2025.

Nutrition & Weight Management 6 Stress Management 7

Certified Coaches

■ Data:

There are an estimated

128,000

U.S. health coaches in the U.S. according to Marketdata's 2021 report, <u>The U.S. Health Coaching Market</u>.

As of December 2022

8,318 7

coaches have been board-certified by the NBHWC

The <u>The National Board Certification credential (NBC-HWC)</u> certification awards yet another level of validity and signals to clients that a health coach has the skills, training, understanding and experience required to be a certified health & wellness coach. For health coaches, it helps them gain confidence in their skills, find a community with other NBC-HWCs and be eligible for some job opportunities which are only available to those with this certification.

Expert opinion

There is not enough transparency and open data on how many coaches have graduated from training programs each year, and we estimate this number to be much higher than 128K. YourCoach.Health contacted most leading schools and institutions to bring more clarity on this point and estimate the number of health coaches in the US, however, we were unable to obtain substantial data.

If you are a school, organization, or institution that provides health & wellness coaching training and are looking to demystify these numbers along with us, please contact revolution@yourcoach.health

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Health Coaching Industry Report 2022 Current Market Landscape

Coach Demographics

■ Data: Gender



Data on gender distribution shows that the health & wellness coaching market is represented mainly by women. [12]



YourCoach Health platform has a larger practicing cohort of men as compared to certified male coaches in the US market. [27]

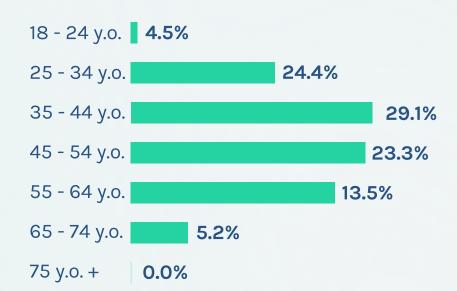


2021 NBC-HWC Survey data shows that a third of the health & wellness certified coaches are aged 45-54 and a quarter range in ages 55-64. [12]

Age 2021 NBC-HWC Survey data



Age YourCoach.Health data



YourCoach. Health attracts a younger audience, compared to data provided by the NBHWC, where nearly one in three is 34 years or younger. A third of health & wellness coaches are aged 35-44. 42% are aged 45 years or older. [27]

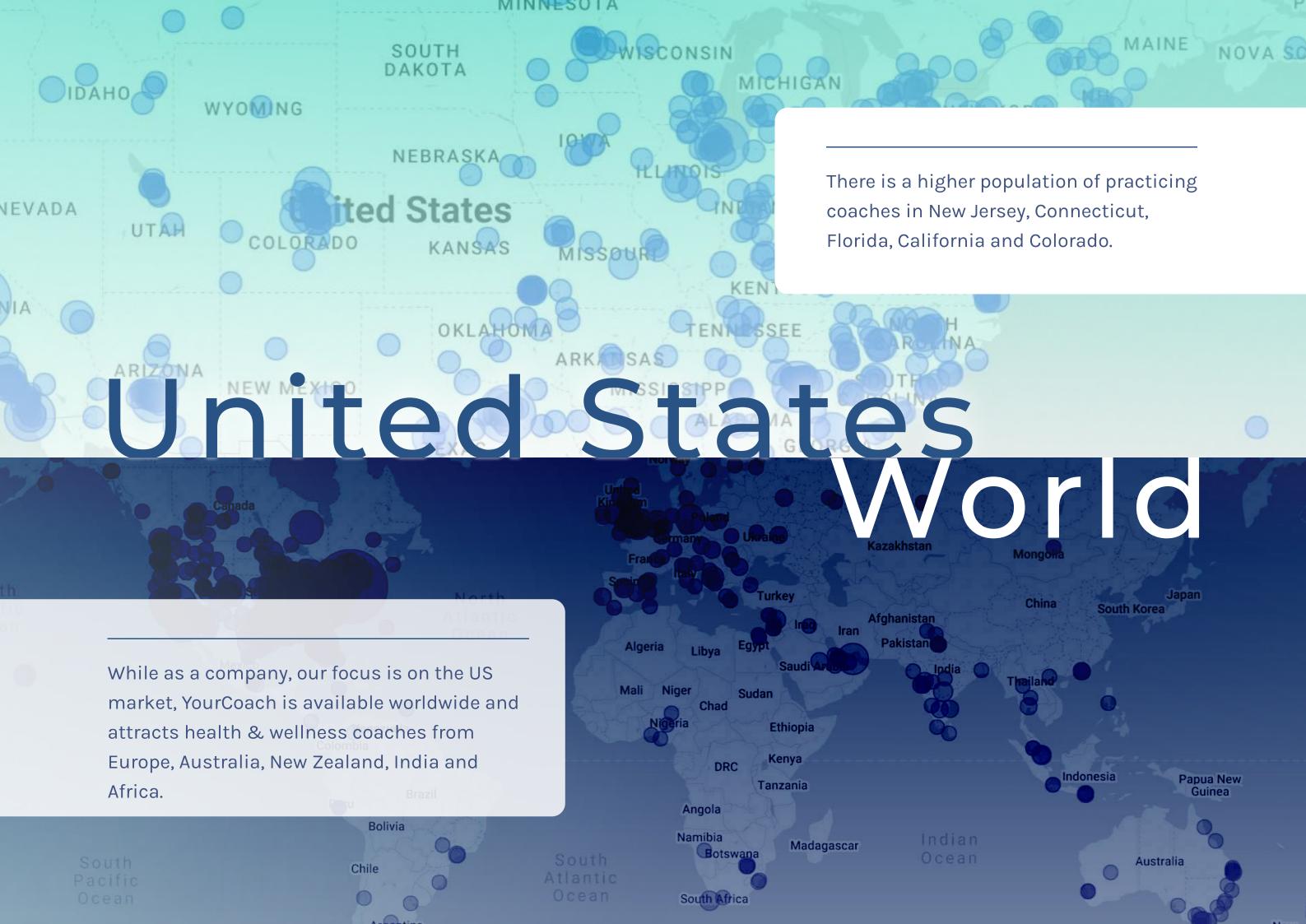




We find that health coaching is more femalefocused. It seems about 81% of our population is female. Mostly in the age 40-60. 40% have a bachelor's or higher. 75% tend to have at least three years or more work experience in this area.

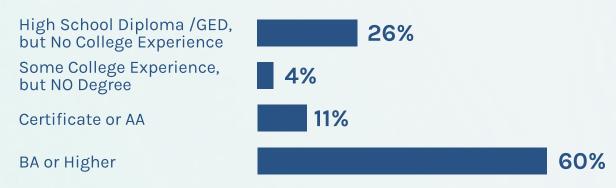


Brian Greenlee MBA Director, Domestic Business Development, **ACE FITNESS**



Every coach has a unique personal story about how they found health coaching. What most of them have in common, is a life event that inspired them to help others. More than half have a Bachelor's degree or higher and after receiving health coaching certifications, they often start a new career or acquire knowledge and skills to progress in their current one.

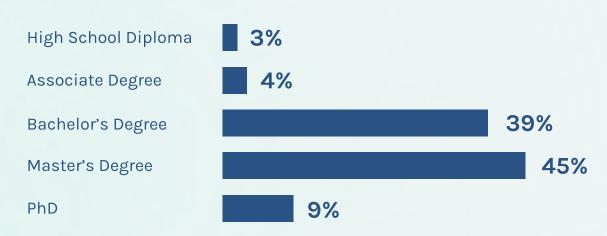
PRIOR EDUCATION



(Source: Institute of Transformational Nutrition)

Among NBHWC certified health & wellness coaches, there is a higher proportion of those who hold a Bachelor's degree or higher. Almost 40% have a bachelor's and nearly half of the certified coaches have a master's degree. 10% have a Ph.D. [12]

EDUCATION (2021 NBC-HWC Survey data)





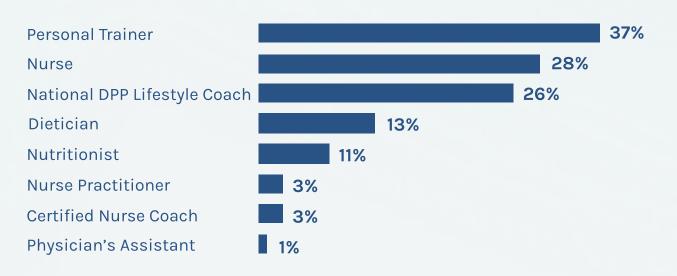
I have observed more people from diverse backgrounds expressing interest in pursuing a career in health coaching, often noting that they experienced a life event which led them to want to help others focus on their health and well-being and support them on their wellness journey. I have often heard from our students that they are looking for a profession and career that is fulfilling and rewarding



Dina LumiaDuke Health & Well-Being Coach Training

Health & wellness coaches obtain additional specializations that allow them to have unique knowledge and practice, often related to their personal background. According to NBC-HWC Survey, more than a third of certified coaches have personal trainer certification. Nearly a third (28%) hold a nursing license. [12]

ACTIVE LICENSES (2021 NBC-HWC Survey data)



57

Health Coaching Industry Report 2022 Current Market Landscape

Salaries

According to the 2021 U.S. Health Coaching Market Report, conducted by Marketdata LLC, health coach salaries range vastly [15]

\$50,000 -\$100,000

\$25 - \$100 per hour

per vear

Salaries range widely depending on various factors, including but not limited to, years of experience, education, certifications, location, type of practice and additional skills.

In May 2021, according to the Bureau of Labor Statistics, the median annual wage was

\$60,600 for health education specialists

\$46,590

for community health workers

Public data taken from employment websites shows average salaries for a health coach range from \$38,671 - \$62,331 per year

Source	Estimated average base salary for a health coach in U.S. per year (USD) [24]
Indeed.com	\$42,134
Glassdoor.com	\$48,278
Talent.com	\$40,891
Zippia.com	\$38,671
Salary.com	\$62,331

According to <u>talent.com data</u>, based on 2,389 salaries, entry level positions start at \$35,100 per year while the highest salary on record is \$67,275 per year



I Health Coaching Industry Report 2022 ► Current Market Landscape

Salaries

The most significant differences in salary are shown depending on years of experience in health coaching. Glassdoor Total Pay Estimate model shows that most experienced workers (15+ years in coaching) earn up to \$66,584 per year, which is 70% higher than entry level coaches.

■ Data:

Glassdoor, for health coaches, base pay only [25]

Estimated average base salary for a health coach in the U.S. per year by years of experience (USD)



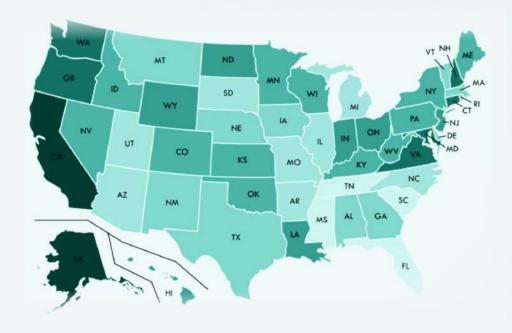


I could say that the average annual salary of our graduates is \$57,673 (\$27.74 per hour) with a maximum annual salary of \$85,000 (\$40.87 per hour)



Kate O'Farrell
the University of Utah, Department
of Health and Kinesiology

Location also impacts how much a health coach can expect to make. Zippia.com data on health coaching salaries across all 50 states shows that the highest salaries are in Alaska, California, Connecticut, Maryland, and Washington. [26]



\$30k lowest \$54k highest

Salaries

According to Indeed.com data, based on 3.5k salaries, the average salary for a health coach is \$18.25 per hour in the United States. Zippia.com reports the same results with \$18.59 per hour and talent.com data is slightly higher - \$21 per hour. [24]

The average salary for a health coach per hour in the U.S. (USD)





72% of the population charged \$25 or higher for a session with a client



Brian Greenlee MBA Director, Domestic Business Development, **ACE FITNESS**

Other factors that influence a health coach's salary:

Type of employment Part-time vs full-time Certifications Additional skills and education

REIMBURSEMENTS



What are CPT®codes?

Current Procedural Technology CPT® codes are created by the AMA and "offer doctors and health care professionals a uniform language for coding medical services and procedures to streamline reporting, increase accuracy and efficiency". [29]

CPT codes make up the uniform language for coding medical services and procedures, and allow for streamlined submission to insurers. There are three main categories of CPT codes: I. II. and III.

What is the difference between them?



Category I

Category I describes distinct medical procedures or services and these codes are used most often for billing purposes, as they specify important, well-established procedures, services, devices, and drugs (including vaccines).



Category II

Category II are used as performance measurement codes in order to gather information about quality of care.



Category III

Category III are described as "temporary alphanumeric" codes and are used in newer approaches and technologies. They help to collect information and make further estimation for services that are still fairly new. [29]



Category III codes can become permanent Category I codes (those that correspond to a service or procedure) after data successfully shows that the code is widely utilized and meets the requirements of Category I codes.

What CPT® codes are approved for health & wellness coaching?

On January 1, 2020, the AMA *approved* Category III Health and Well-Being Coaching Codes, which include:

0591T

Health and Well-Being Coaching face-to-face; individual, initial assessment

0592T

Individual, follow-up session, at least 30 minutes

0593T

Group (two or more individuals), at least 30 minutes

Here is a sampling of other codes that may fit within specific categories within health coaching:

97116

97535

97545

97150

99401-99404

Preventative Medicine, individual counseling code

97802 97803 97804

Medical Nutrition Therapy Procedures

Physical Medicine and Rehabilitation Therapeutic Procedure

96150

97110

96151

96152

97113

Health Behaviour Assessment Services

909001

Biofeedback Services and Procedures

What is a taxonomy code and why is it important?

A taxonomy code is a unique ten-character alphanumeric code that identifies one's specialization and classification to an insurance payer on their claims. Starting April 1, 2021, it is effective for board-certified health coaches. In order to use this taxonomy code, health coaches need to apply for a National Provider Identifier (NPI), which is a unique identification number for covered health care providers and was created for billing purposes.

For health & wellness coaches

the taxonomy code is

171400000X

When will the Category I codes be approved for health & wellness coaching?

To be revised as the Category I and Category II CPT® codes, according to <u>AMA criteria</u>, there will need to be sufficient evidence that health coaching services are frequently used across the United States, and have facilitated data collection procedures that prove the significant health outcomes and show clinical efficacy.

While much work needs to be done, we have no doubt that this will happen in the near future. The latest advancements include a partnership between The National Board for Health & Wellness Coaching (NBHWC), The National Commission for Health Education Credentialing, Inc. (NCHEC), and the University of California San Diego (UC San Diego) on a collaborative project to continue integrating health & wellness coaching in healthcare.

This project has focused on the collection, tracking, and organizing of the data from the last couple of years that shows the use of Category III CPT Codes by health & wellness coaches. This collection and eventual analysis of this data will support the application for full service reimbursement to the American Medical Association (AMA) and therefore, the approval of health & well-being coaching services as permanent Category I CPT® codes.

In May 2023, the AMA is expected to vote on Category I CPT codes for health and well-being coaching.

Health Coaching Industry Report 2022

Reimbursements



We anticipate that it will take 10 to 12 months to collect the data needed to apply for Category I Codes, and we are looking forward to working with the UC San Diego team and health & wellness coaches from medical settings throughout the country



Leigh-Ann Webster

Executive Director for the National Board for Health & Wellness Coaching, a controlled affiliate of the National Board of Medical Examiners

Expert opinion

Data collection is currently focused on health systems and while we are aware of some institutions using the test Level III CPT codes, we do not believe that health systems is the best place to collect this data as behavioral health is typically either outsourced or unfortunately deprioritized in these settings. We strongly believe that the collection should be augmented with data from digital health and telehealth companies where health coaching interventions are prevalent and will derive much more value, usability and even outcomes.

Health Coaching Industry Report 2022 Reimbursements

DIGITAL HEALTH AND HEALTH COACHING



Digital Health and Health Coaching

Global Health innovation funding year over year



While digital health funding has slowed, we firmly believe that the industry is undergoing a much needed recalibration, but even more importantly that digital health technologies are now embedded across the health care system's value chain.

There is, however, a growing realization that while technological advancements have been extending our life span and improving outcomes, the human touch is <u>essential</u>. We've seen digital health companies embedding health coaching into their offerings to achieve this essential, interpersonal element.

In qualitative discussions, YourCoach has gathered few key reasons why embedding coaching into the digital health stack is so important:

Patient & Consumer Engagement

Self-paced tools are here to stay - however behavior change is hard and is highly personal; adding health coaching helps with client retention and engagement around a company's product or service

Comprehensive Service Stack

As digital health point solutions have become popularized over the last decade, upstream health plans and employer clients are asking for more comprehensive services that include health coaching

Health Outcomes

as we've addressed in "The Science of Health Coaching" section of this report, there is growing evidence that health coaching is contributing to improved patient outcomes

Below is just a small sampling that has been compiled by our friends at HealthXL of digital health, virtual care and digital therapeutic companies that leverage health coaching as part of their product or offering



Insight:

Did you know that YourCoach is the only operating system for behavior change powered by health coaches and that we help digital health companies to stand up or augment their existing health coaching operations within 30-90 days?!

HEALTH
COACHING
INDUSTRY
CHALLENGES
AHEAD



Health Coaching Industry Challenges Ahead

Significant advancements have been made in the health coaching industry since the publication of our original Health Coaching report, but just like with any industry that is making a positive impact, there are still major obstacles ahead for further adoption and scaling

Knowledge of what health coaching is

There are many organizations (including many mentioned in this report) that have done a great deal to educate the masses on what health & wellness coaching is and the health coach's scope of practice. Considering that health coaching has been around for over 2 decades, it is still quite a nascent field with many overlapping definitions and without overarching legislative oversight. It is our hope that with this report and through various educational outlets, we can demystify this field and shed light on the importance of a health coach as an integral member of a health and care team as well as the longterm value of a health coach/health consumer relationship.



I think it's important to increase the level of awareness of who and what health coaches are by conventional healthcare providers. I think most physicians have no idea what a health coach is. A lot of consumers have no idea what a health coach is. So I think our challenge in the next 5 to 10 years is to continue to raise a clarified understanding of the field out there in all of the markets, both consumer and professional



Karen Lawson, MD University of Minnesota, Center for Spirituality and Healing

Proving outcomes

While health coaching is a non-clinical and nonprescriptive service using science-backed techniques, the expanding evidence on the benefits of health coaching as a disease-specific set of interventions has been growing. These positive outcomes are driving the adoption of coaching within the healthcare system. However, there is still skepticism in the clinical community and hence more evidence is needed to drive further adoption and integration of the two worlds.

Variability in quality

There are now over 110 schools accredited by the NBHWC, however there are new schools and programs sprouting around the world touting the benefits of health coaching education in addition to the undergraduate, graduate and continued education programs that are accredited. We believe that health coaching is still a wild wild west when it comes to coach quality and hence real world data alongside certifying and accreditation bodies such as the NBHWC is needed and required.



I think one of the biggest risks to the field are coaches who do not have standard training and standard of practice, or who step into areas that are really outside of their scope, such as prescribing

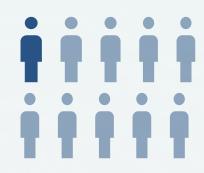


Karen Lawson, MD University of Minnesota, Center for Spirituality and Healing

Reimbursements

The road to reimbursements is not an easy one, ever... and while significant steps have been taken to move the Level III (test) CPT codes along, we still believe that the industry has to brace itself for another ~24 months assuming CPT Level I codes will get approved. We are expecting the submission for Level I CPT codes to take place February 2023 with an initial AMA panel voting to take place May 2023. Assuming they move forward, the operationalization and deployment of these codes will take at least another 12 months from the approval date. It is also unclear who these reimbursements will apply to (i.e will it apply to only NBHWC-certified coaches or will other organizations factor in as well?).

Data:



Only 1 in 10 certified coaches utilize Category III codes [12]

I think the biggest challenge in the industry right now is access. Everyone could benefit from a health coach, but very few can afford to pay for private coaching. Once insurance coverage is in place and coaching options are more widely available, I think education will be increasingly important—educating the public and medical professionals on the health and fiscal benefits of universal access to health coaching. The Veterans Administration in the United States is doing great work right now to model and study those benefits.



Sarah Hays-Coomer Forbes columnist, author and NBC-HWC coach

Access to a health coach: Consumer, payor and employer adoption

Our mission at YourCoach Health is by 2030 for the projected 8.5B people on this planet to have access to a health coach. It is a bold goal and it starts with the ability for end consumers to be able to afford but also find the right coach for them as an individual. We are seeing self-insured employer adoption but the tightening clinical budgets are squeezing the spend (which grew initially during the COVID-19 pandemic) on more preventative services with the economic downturn. We do expect HSA/FSA eligibility to alleviate consumer pockets and increase employer adoption in 2023 as HSA eligibility is expected just in time for the 2022 holiday season.

Key Industry Trends



Health Coach: A profession that stands on its own

While there is still a long way to go in educating the masses on health coaching, we do strongly believe that health & wellness coaching will become a profession that stands on its own and will be recognized by the Department of Labor.



Recalibration of the Nascent Market

2022 brought health coaching into the spotlight with major steps forward in the science of health coaching and upcoming reimbursements, but it also shined a light onto large layoffs of coaches across the industry in fast paced digital health companies. This recalibration was and is much needed as the true value of coaching is not in the nudging of patients and health consumers but a deep understanding of a person's behavior and the profession's goal oriented methodologies.



Tighter integration with the healthcare industry

Health systems are under pressure as margins shrunk over 20% across the industry driven mainly by labor costs of clinical staff - and while health coaches have a very specific scope of practice (non-clinical) there is room to leverage this workforce to allow clinicians and nurses to practice at the top of their licenses.



State Legislature

Given the advancements and positive impact health coaching continues to make with reimbursements looming on the horizon, we fully expect states to begin their efforts of regulating the profession.



Global Adoption

Given the stress on the healthcare systems worldwide, we are seeing more global expansion of health coaching associations and small but impactful steps towards adoption.

Health Coaching Industry Report 2022 **Key Industry Trends** 69

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Health Coaching Industry Report 2022 **Endnotes**

Acknowledgements

We have made every effort to ensure that the information presented in this report is accurate and up-to-date. The general goal here is to inform the public and the community on important topics within the health coaching industry. This report is not recommended to use as grounds for professional consultancy or academic papers. If there is any relevant information you would like to add to the above-collected information and our insights, please contact revolution@yourcoach.health.

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About YourCoach

YourCoach.Health is the only operating system for behavior change, powered by health coaches. Our industry partners entrust us to stand up or augment their health coaching operations utilizing our APIs, widgets and tech-augmented army of validated and credentialed health coaches to surround their existing product or service. We're the premier virtual home for health and wellness coaching, an ecosystem built to empower health coaches while expanding access to their services through our industry partnerships. Join us on the Health Coaching Revolution as we strive to deliver the power of health coaching to the 8.5 billion global population by 2030.

Our mission

By the year 2030 our mission is for the projected 8.5 billion people in the world to have access to Health Coaches, creating even more Happy and Healthy Humans.





