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IN COLLABORATION WITH THE DEPARTMENT OF BUSINESS ETHICS

THE INCOME GAP 2026

Fees, market structures and growth — and why it does not reach all providers

An analysis of the income and market structures of coaches, trainers and management consultants in Germany — in light of the G-House Trust & Authority Report 2026

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LEGAL NOTICE AND METHODOLOGY DECLARATION

The Income Gap in the Expert Market 2026 is a secondary analysis. It is based on the systematic evaluation and synthesis of published primary studies, market reports and industry data. No primary data of our own was collected. The study makes no claim to statistical representativeness for the German expert and consulting market as a whole.

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This study follows on in substance from the G-House Trust & Authority Report 2026. While the latter examines the psychological and market-structural mechanisms of trust and reputation, the present study focuses on the economic consequences: income, fees, market shares and the distribution of growth in the German coaching and consulting market.

CONTENTS

CHAPTER I

Executive Summary

Key findings of the study

Drawing on published market and income studies, this report analyses how coaches, trainers and management consultants in Germany are developing economically — and whether the documented growth of the overall market is reaching all providers evenly. The analysis arrives at five central findings:

BEFUND 1

The German consulting and coaching market has been growing structurally for years — the total revenue of the management consulting industry approached the 50 billion euro mark in 2025/2026.

BDU Facts & Figures 2025/2026

BEFUND 2

Growth is not distributed evenly: small consultancies with up to 1 million euros in revenue are seeing declining business, while medium-sized and large providers are growing.

BDU Facts & Figures 2025/2026

BEFUND
3

In the coaching market, the average income is around 89,000 euros gross per year — with considerable variation between solo self-employed coaches and those with their own team.

RAUEN Coaching Market Analysis 2024

BEFUND
4

Conventional visibility and reach measures are among the least effective instruments for winning business — even the most successful method achieves, on average, only a low single-digit success rate.

RAUEN Coaching Market Analysis 2024

BEFUND
5

The central German funding instruments for consulting services (BAFA) are not open to coaches and consultants as recipients for their own positioning — structurally, not out of ignorance.

BAFA Funding Guideline 2023–2026

BEFUND
6

A substantial part of the coaching field — life counselling, personal development, spiritual coaching — is structurally underrepresented in academic market research; no reliable size estimate exists for this segment to date.

Own analysis of the data situation

BEFUND
7

In a line of case law consolidated since 2025, the Federal Court of Justice has ruled that structured online coaching and mentoring contracts without official ZFU accreditation are void — with immediate clawback risks for the providers concerned.

BGH, rulings 2025/2026 on the FernUSG

These findings have immediate implications for all actors operating in the German expert and consulting market. According to the available data, the decisive difference between growing and stagnating providers lies less in professional qualification than in institutional and media anchoring — a finding that aligns with the G-House Trust & Authority Report 2026.

CHAPTER II

Methodology and Data Base

Research design

This report is based on a systematic secondary analysis. Only published market analyses, industry studies and official statistics were evaluated. No primary data of our own was collected. The selection of sources followed three criteria: (1) methodological transparency, (2) relevance to the German-speaking coaching and consulting market, (3) currency (survey period 2023–2026).

Primary studies considered

STUDY / SOURCE	SAMPLE / METHODOLOGY	THEMATIC FOCUS
RAUEN Coaching Market Analysis 2024	n=1,100 coaches, Germany	Income, marketing, professionalisation
artop / HU Berlin: Coaching Survey 2025	n=473 coaches, survey 2025	Working style, target groups, client structure
BDU Facts & Figures Consulting Market 2025/2026	approx. 300 consulting firms	Market volume, revenue development by size class
BDU Facts & Figures Executive Search Market 2025	approx. 200 executive search firms	Revenue, fee structure in executive search
Federal Statistical Office (Destatis)	Official statistics	Employees, gross annual earnings in the consulting sector

STUDY / SOURCE	SAMPLE / METHODOLOGY	THEMATIC FOCUS
BAFA Funding Guideline Management Consulting	Official regulatory framework	Eligibility, exclusion criteria
ICF Global Coaching Study 2025 (PwC)	n>10,000 coaches, 127 countries	Global market comparison, revenue development

Full source references in the bibliography (Chapter XII).

Scope and limitations

This study makes no claim to statistical representativeness for the German expert and consulting market as a whole. It evaluates existing studies and derives conclusions from them. The market studies drawn upon differ in sample size, survey method and market definition; a direct, methodologically precise comparison between the coaching market and classic management consulting is therefore only possible to a limited extent and is marked as such in the text.

Where data on funding programmes are used, these refer to the legal status at the time of publication (July 2026). Funding guidelines are subject to periodic adjustment; current conditions should always be verified with the responsible authority (BAFA, regional coordination offices) before submitting an application.

CHAPTER III

Market Structure

How large is the German expert market really?

The German market for coaching, training and management consulting is heterogeneous, fragmented and, depending on definition and source, quantified in different ways. A serious assessment therefore requires clearly separating the various market segments and their respective data sources, rather than merging them into a single figure.

— The coaching market in the narrower sense

Estimates of the number of active business coaches in Germany range between roughly 9,000 and roughly 13,000, depending on the underlying definition of "coach" — a profession that is not legally protected in Germany and has no uniform admission requirement. The RAUEN Coaching Market Analysis 2024 captured 1,100 usable questionnaires, which, assuming an estimated population of around 13,000 business coaches, corresponds to a sampling rate of about 8.5 percent — a high figure for industry studies of this kind.

~9.000–13.000

active business coaches in Germany, depending on the underlying definition.

RAUEN COACHING MARKET ANALYSIS 2024 · STEPHAN & RÖTZ 2018

For context: internationally, the number of professional coaches grew to around 123,000 worldwide, according to the ICF Global Coaching Study 2025 (conducted by

PricewaterhouseCoopers, n>10,000 coaches in 127 countries) — an increase of 15 percent compared with 2023, with an estimated global annual revenue of 5.34 billion US dollars.

The management consulting market in the narrower and broader sense

Management consulting, by contrast, is a considerably larger, institutionally better developed market. In its narrow definition of the consultant, the German Association of Management Consultants (BDU) counts the fields of strategy consulting, organisation and process consulting, IT consulting and HR consulting.

METRIC	VALUE	SOURCE / YEAR
Total revenue consulting market Germany	49,0 Mrd. € (2025)	BDU 2026
Forecast total revenue 2026	~51,1 Mrd. € (+4,5 %)	BDU 2026
Number of consulting firms	~26.350 (2024)	Statista / BDU
Employees subject to social insurance	>135.000 (2024)	Statista / BDU
Avg. gross annual earnings full-time employees	~98.600 € (2024)	Statista
BDU member companies (organised)	~600 companies, 19,000 consultants	BDU 2026

Own compilation based on BDU Facts & Figures 2025/2026 and Statista.

Important for the assessment: the BDU figures primarily capture the organised consulting landscape represented within the association — predominantly consulting firms with several employees. The number of freelance, self-employed management consultants and solo consultants ranges, according to varying estimates, from around 88,000 to over 248,000 — depending on whether commercial register entry, self-declaration or business registration is used as the criterion. These estimates come from commercial address databases and are methodologically not comparable with the BDU association statistics; they do, however, point to a very large, statistically barely captured segment of solo and micro-consultants that is underrepresented in the official industry figures.

COACHING MARKET		MANAGEMENT CONSULTING	
~ 9,000–13,000	Ø 89.249 €	~ 26,350	Ø 98.600 €
active business coaches	avg. gross annual income	consulting firms	avg. gross annual salary

FIGURE 1 Market structure comparison: coaching market versus management consulting market in Germany
Own illustration based on RAUEN (2024), Stephan & Rötz (2018), BDU Facts & Figures 2025/2026 and Statista.

— The uncaptured segment: life counselling, personal development and spiritual coaching

The 9,000 to 13,000 business coaches cited so far represent only part of what is understood as "coach" in German usage. Alongside this exists a considerably larger field — barely captured in official and association statistics — of life counselling, personal development, mental training and spiritual coaching. The occupational titles "coach" and "life counsellor" are both legally unprotected in Germany — unlike, for example, in Austria, where life and social counselling is run as a regulated trade with mandatory training.

To the authors' knowledge, no reliable overall figure exists for this segment. The figures circulating in industry marketing — such as a "35-billion market" for spiritual life counselling or growth rates of "over 30 percent in five years" — originate from self-published material by commercial providers of this market itself and do not meet the minimum methodological standards this study applies to its sources (cf. Chapter II). They are therefore deliberately not adopted here as a factual basis.

What can be demonstrated, however, is the structural invisibility of this segment in research itself: both RAUEN and artop/HU Berlin draw their samples via coaching associations, training institutes and professional networks that are predominantly business-oriented. Life counsellors, spiritual coaches and providers without association ties are, with high probability, underrepresented in these samples. Directories such as the "Heilverzeichnis" list several hundred providers in this area alone, without a nationwide overall figure being extrapolable from them.

This data gap is significant for the present study itself: if even the capture of a market segment depends on the established, institutionally networked centre of the profession, then the same pattern applies — with all the more force — to its economic success. Anyone operating in a professional field without a training standard, without association ties and without academic visibility not only starts without the reputational advantage described in Chapters VI to IX — they begin, even before any market consideration, in the blind spot of the available data. This study deliberately refrains from closing this gap with an invented figure; it names it as a finding in its own right.

— A fundamental observation on the data situation

The asymmetry of the data situation is itself already a relevant finding: while the organised, established consulting market is measured in detail every year (BDU, Lünendonk, Statista), only a few, smaller academic surveys exist for the large field of freelance coaches, trainers and solo consultants (RAUEN, artop/HU Berlin). Anyone operating in this less visible market segment therefore not only has less reputational infrastructure in the market — they are also structurally underrepresented in research and public perception.

IV

CHAPTER IV

Income Reality in the Coaching Market

What coaches in Germany actually earn

The RAUEN Coaching Market Analysis 2024 provides the most detailed income data available for the German coaching market. It reveals a picture of structural stability at a moderate level — with considerable variation depending on business model, experience and gender.

89.249 €

average gross annual income of coaching providers in Germany (2024). Coaching accounts for 47.1 percent of this — for most providers, coaching is only part of the business.

RAUEN COACHING MARKET ANALYSIS 2024

Fees by business model and experience

GROUP	AVG. HOURLY FEE	CHANGE VS. 2023
All coaches (average)	175,98 €	+4,7 %
Male coaches	191,14 €	+6,3 %
Female coaches	169,49 €	+3,4 %
Coaches with over 15 years of experience	212,23 €	+6,3 %

GROUP	AVG. HOURLY FEE	CHANGE VS. 2023
Coaches with up to 5 years of experience	150,00 €	+4,9 %
Self-employed with their own team	219,77 €	—

Source: RAUEN Coaching Market Analysis 2024 (n=1,100); Haufe analysis 2024.

FIGURE 2 Hourly fees in the German coaching market by business model and experience (2024)
Source: RAUEN Coaching Market Analysis 2024 (n = 1,100); Haufe analysis 2024.

Three structural features stand out: first, a well-known gender pay gap — explicitly named as such in the study — of 12.8 percent in favour of male coaches, with no discernible qualitative difference according to the study data. Second, a marked experience effect: coaches with more than 15 years of practice earn around 40 percent more per hour than newcomers. Third, a structural feature often overlooked in public debate: for most providers, coaching is not a stand-alone business model but part of a broader consulting and training portfolio.

— The professionalisation problem

Because the occupational title “coach” is not legally protected in Germany, the lack of market regulation has a direct effect on income dispersion. The RAUEN Market Analysis 2024 surveyed the industry's self-assessment on this for the first time:

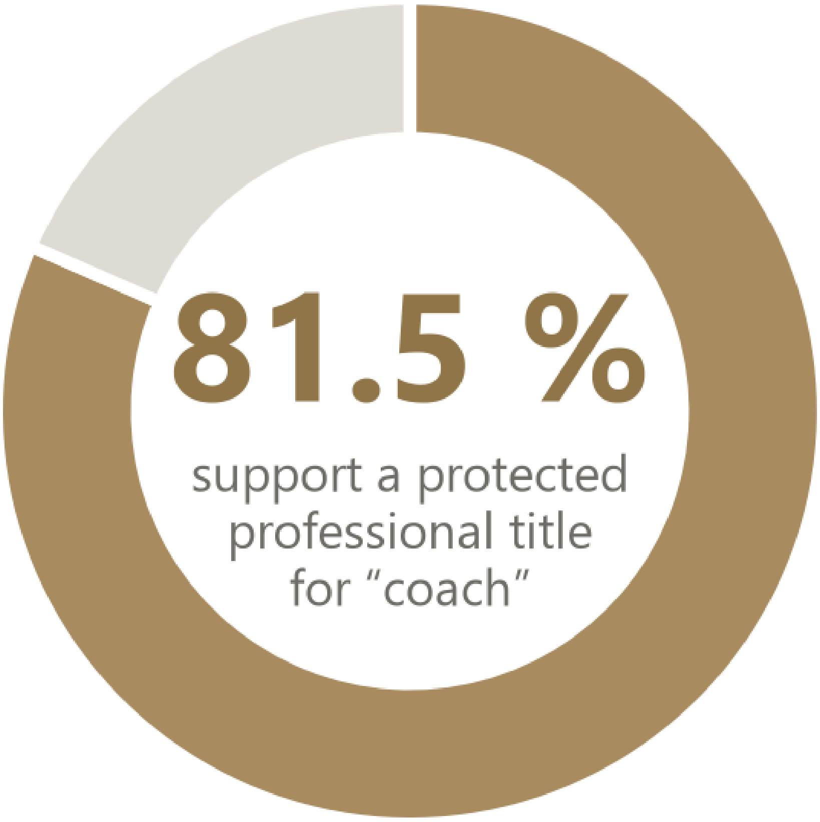

FIGURE 3 Self-assessment of the degree of professionalisation of the coaching industry by surveyed coaches
Source: RAUEN Coaching Market Analysis 2024 (n = 1,100).

81.54 percent of the coaches surveyed were in favour of "coach" becoming a state-recognised, protected occupational title. This figure was lower among male coaches with more than 15 years of experience (73.01 %) — an indication that established market participants would tend to benefit less from market regulation than newcomers, who expect binding standards to provide better differentiation from unqualified providers.

— Supplementary findings from the artop survey 2025

The Coaching Survey Germany 2025 by the artop Institute at the Humboldt University of Berlin (n=473, led by PD Dr. Thomas Bachmann), conducted independently of RAUEN, confirms central structural features of the market and provides additional depth on client structure:

FEATURE	FINDING	SOURCE
Share of clients in leadership positions	approx. 64 %	artop/HU Berlin 2025
Dominant coaching format	One-on-one coaching	artop/HU Berlin 2025
Use of AI tools in coaching (2024)	approx. 65 % do not yet use AI	Bachmann/Petersen 2025
Attitude towards technological development in general	clearly positive (avg. 5.26 out of 6)	artop/HU Berlin 2025

Source: Coaching Survey Germany 2025, artop – Institute at the Humboldt University of Berlin.

The convergence of two methodologically independent surveys — RAUEN and artop/HU Berlin — on comparable structural findings (income level, professionalisation deficit, target-group structure) strengthens the validity of the market description presented here.

V

CHAPTER V

Income Reality in the Consulting Market

Growth, margins and their distribution

On the industry average, the German management consulting market presents a markedly different picture from the coaching market: higher average incomes, stronger institutional anchoring — but here, too, with considerable internal variation.

98.600 €

average gross annual earnings of consultants employed subject to social insurance in the German management consulting industry (2024).

FEDERAL STATISTICAL OFFICE / STATISTA

— Growth dynamics by consulting field

The BDU study “Facts & Figures on the Consulting Market 2026” shows an uneven growth picture across the consulting fields:

CONSULTING FIELD	GROWTH 2025	FORECAST 2026
IT consulting	+2,8 %	+4,7 %
Strategy consulting	+1,1 %	+5,2 %

CONSULTING FIELD	GROWTH 2025	FORECAST 2026
Organisation and process consulting	−0,8 %	+3,5 %
HR consulting	−0,8 %	+4,2 %
Artificial intelligence (sub-segment)	+18,8 %	+22 %

Source: BDU Facts & Figures on the Consulting Market 2025/2026.

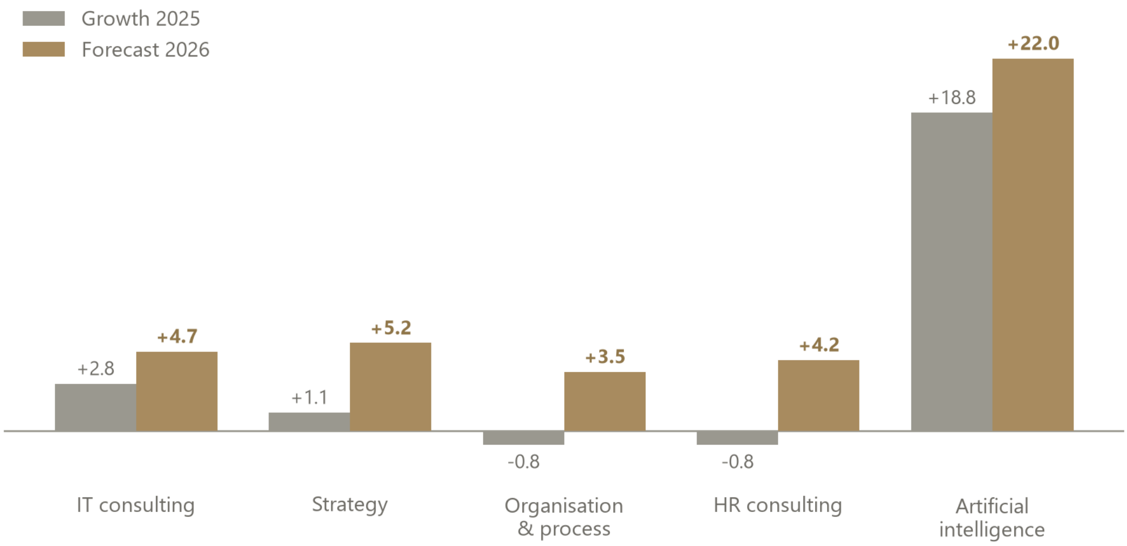

FIGURE 4 Growth dynamics by consulting field: actual value 2025 and forecast 2026
Source: BDU Facts & Figures on the Consulting Market 2025/2026.

The special position of artificial intelligence as a consulting field is striking: with growth of 18.8 percent (2025) and a forecast of 22 percent (2026), this segment lies far above the market average — an indication that technological differentiation and specialisation are currently the strongest growth drivers of the industry, clearly ahead of classic generalist consulting.

— Executive search: a counterexample

Not every consulting segment is growing. The specialised executive search market — executive search, recruiting consulting — has shown declining revenues for several years:

2,78 Mrd. €

forecast industry revenue of German executive search firms for 2025 — a decline of 1.2 percent compared with the previous year, following an already 3.8 percent decline in 2024.

BDU FACTS & FIGURES EXECUTIVE SEARCH MARKET 2025

Within this declining overall market, certain specialisations grew above average at the same time: executive coaching (+4.2 % in 2024) and leadership advisory (+3.7 %). This pattern — the overall market stagnating or shrinking while individual highly specialised, reputation-strong niches continue to grow — runs, as the following chapter shows, through almost the entire expert and consulting market.

VI

CHAPTER VI

The Polarisation Finding

Growth at the top, stagnation at the bottom

The central economic insight of this study lies not in overall market growth itself, but in its unequal distribution by company size. The BDU data allow a differentiation here that is rarely presented with this clarity in public market reports.

SIZE CLASS	REVENUE SIZE	GROWTH 2025
Large consultancies	from 50 Mio. € revenue	stagnating (~0,0 %)
Medium-sized consultancies	1–50 Mio. € revenue	+0,5 % to +2,0 %
Small consultancies	up to 1 Mio. € revenue	up to −2,5 %

Source: BDU Facts & Figures on the Consulting Market 2025/2026.

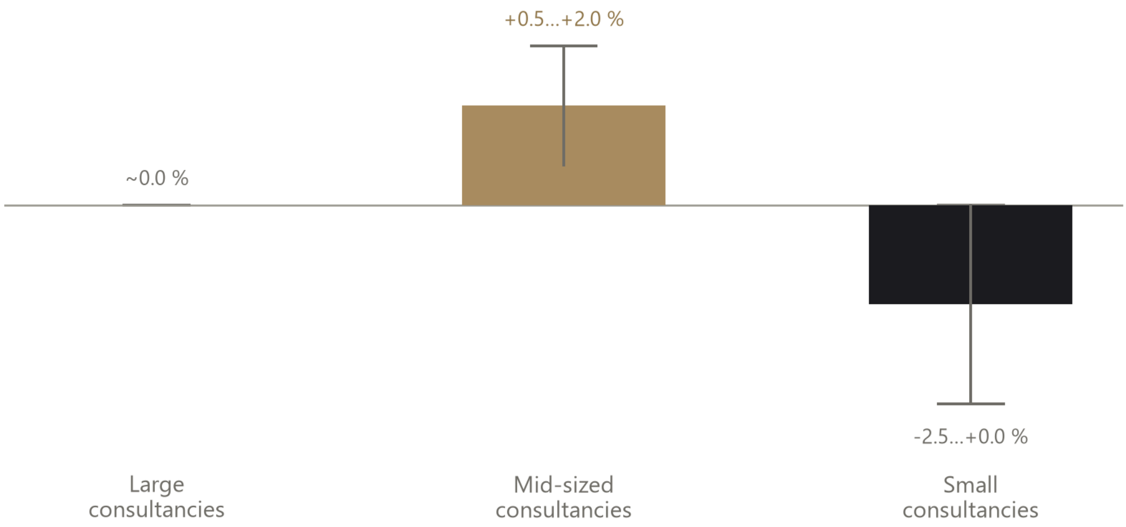

FIGURE 5 The polarisation finding: revenue growth by company size (2025)

Source: BDU Facts & Figures on the Consulting Market 2025/2026. Bars show the mean of the reported ranges; vertical lines mark the full range.

»

Small consultancies (up to 1 million euros in revenue) remain under pressure and record negative growth of up to minus 2.5 percent. [...] In today's environment, consultancies must be able to act very flexibly and, in line with client needs, deliver in a technologically innovative and proficient way. Large, broadly positioned consultancies often find this somewhat easier than small consultancies, which must now do everything to position themselves for the future.«

IRIS GREWE, PRESIDENT OF THE BDU, ON THE STUDY "FACTS & FIGURES ON THE CONSULTING MARKET 2026"

— Assessment: a structural, not a cyclical finding

This pattern is neither new nor purely cyclical. It shows consistently across several reporting years: large, institutionally anchored consulting houses with established brand identities, media presence and reference networks tend to expand their market share, while small and solo providers — often with comparable professional qualifications — are increasingly under pressure to justify and differentiate themselves before clients.

Here a substantive parallel to the finding in the executive search sector emerges: generalised, undifferentiated consulting services come under price and demand pressure, while specialised, clearly positioned and externally validated expertise grows even in a stagnating overall market. Transferred to the coaching and consulting market in the broader sense, this can be formulated as follows: it is not the market as a whole that is weakening — it is the undifferentiated middle.

— What the data do not show — and what they suggest

At this point, methodological caution is warranted: the BDU data do not causally explain why small providers fall behind. They could equally be attributable to capital resources, staffing, economies of scale in sales, or simply lower bargaining power vis-à-vis large clients. What the data do suggest, however — and what is underpinned in the following chapter with findings on marketing effectiveness — is that classic visibility and self-promotion strategies do not represent an adequate response to this structural pressure for small providers.

VII

CHAPTER VII

Visibility Without Effect

The marketing gap in the coaching and consulting market

If professional qualification alone does not explain why small providers fall behind economically, the question arises as to which marketing strategies actually contribute to winning business. The RAUEN Coaching Market Analysis provides the most differentiated data source available in the German-speaking region on this.

3,92 %

average success rate of talks at congresses and trade fairs — the most effective of the visibility measures examined — in acquiring new clients. Among less experienced coaches, the figure was at times below one percent.

RAUEN COACHING MARKET ANALYSIS 2024

Effectiveness comparison of marketing instruments

MARKETING INSTRUMENT	CHARACTERISTIC	RELATIVE EFFECTIVENESS
Warm acquisition (existing network)	costly, long-term, non-imitable	high
Personal referrals	costly, trust-based	high
Talks at congresses / trade fairs	moderate effort, media visibility	medium (avg. 3.92 %)
Social media activity / self-promotion	low-threshold, arbitrarily reproducible	low
Paid advertising / PR packages	costly, but arbitrarily purchasable	low

Own analysis based on RAUEN Coaching Market Analysis 2024 and Coaching Magazine evaluations 2020–2024.

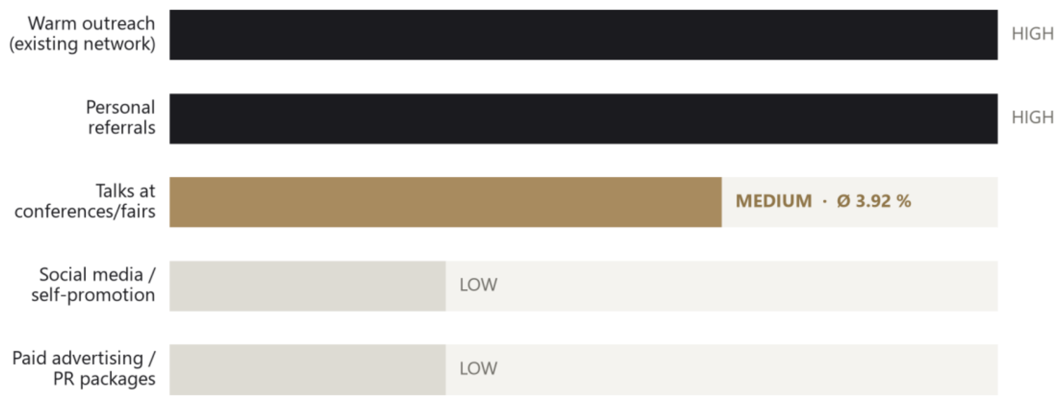

FIGURE 6 Effectiveness comparison of marketing instruments in the German coaching and consulting market
Own analysis based on RAUEN Coaching Market Analysis 2024 and Coaching Magazine evaluations 2020–2024.

The findings align with economic signalling theory, as also presented in the G-House Trust & Authority Report 2026 (Spence 1973): marketing instruments that are free or arbitrarily reproducible — such as self-promotion on social media — generate little differentiation, because they are equally available to every provider. Instruments that rest on costly, non-arbitrarily reproducible trust capital — established networks, personal referrals, editorial media presence — achieve significantly higher success rates.

— The legal dimension: when visibility meets a lack of substance

The gap between the promise of visibility and actual results described in this chapter has, since 2025, also acquired a legal dimension confirmed at the highest judicial level. In a consolidating line of case law, the Federal Court of Justice has ruled that a substantial part of high-priced online coaching and mentoring programmes is legally to be classified as distance learning within the meaning of the Distance Learning Protection Act (FernUSG) — with serious consequences for providers lacking the accreditation required for this.

»

§ 7 (1) FernUSG Coaching and mentoring contracts involving structured knowledge transfer, predominant physical separation and monitoring of learning outcomes qualify as distance learning. If the accreditation of the Central Office for Distance Learning (ZFU) is lacking, the contract is void from the outset — including in the B2B sphere. BGH, judgment of 12.06.2025, Case No. III ZR 109/24«

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In the underlying case, a participant had booked a "9-month business mentoring programme" for a total price of 47,600 euros. The Federal Court of Justice confirmed the reclaiming of the amounts already paid and clarified: what is decisive for the legal classification is the function of the offering, not its designation. Programmes that combine structured knowledge transfer with learning objectives, modules and outcome monitoring under labels such as "coaching", "mentoring" or "consulting" thereby fall under the accreditation requirement — regardless of the contracting party. The Federal Court of Justice confirmed this line in a further judgment of 2 October 2025 (Case No. III ZR 173/24) and refined it in February 2026 (Case No. III ZR 137/25 and III ZR 73/25) to the effect that purely live, non-recorded formats with genuine reciprocal communication are generally not covered.

— Significance for the economic assessment of this study

This case law is relevant to the present study in two respects. First, from a legal perspective it confirms an observation that already emerges from the market and effectiveness data: some of the visibility and transformation programmes offered on the market are not only economically ineffective (Chapter VII), but also vulnerable in their legal construction if the required ZFU accreditation is lacking. Second, it changes the risk situation for reputable providers: anyone offering structured, modular programmes with learning-outcome monitoring needs, under this case law, either accreditation or a deliberate contractual and didactic delimitation from the concept of distance learning.

For the question of reputation economics addressed in this study, this means: legal robustness is a further, hitherto not systematically considered component of the Authority Gap. A provider whose contract design does not withstand review at the highest judicial level builds on a foundation that is fundamentally at risk, independently of marketing success or market reputation — a finding that adds a legal dimension to the synthesis with the Trust & Authority Report 2026 presented in Chapter IX.

— The economic consequence of a distorted marketing focus

This data situation has an immediate economic implication: providers who invest a disproportionate share of their marketing budget and time in visibility and reach measures with demonstrably low success rates achieve a lower return per hour invested than providers who invest in building network trust and third-party-validation trust. This explains part — not the entirety — of the polarisation finding documented in Chapter VI: larger, established providers usually already possess robust networks and media reputation; smaller and newer providers must first build these, but in doing so frequently resort to the least effective instruments.

CHAPTER VIII

VIII

Funding Landscape

Accessible and blocked instruments

A widespread narrative in the consulting scene holds that small providers leave available funding money unused. A systematic review of the relevant German funding programmes substantially qualifies this narrative — and reveals a structural bottleneck, not one caused by lack of knowledge.

— BAFA funding of management consulting: structurally not accessible to consultants themselves

The best-known German funding instrument in the consulting context — the BAFA funding programme "Management Consulting for SMEs" — subsidises consulting services that companies purchase from external consultants. Coaches and management consultants themselves, however, are explicitly excluded as recipients for their own positioning:

» *Excluded from BAFA funding are companies and members of the liberal professions whose main activity is consulting. These include, for example, the fields of management consulting and auditing, as well as professional groups such as tax advisers, lawyers and notaries.«*

BAFA FUNDING GUIDELINE MANAGEMENT CONSULTING FOR SMES

Under this programme, a coach or consultant can act solely as a service provider for other SMEs — not as a funding recipient for their own positioning, marketing or strategy consulting. The widespread expectation that one could "have one's own positioning funded via BAFA" is therefore incorrect for one's own consulting activity.

— KOMPASS: the relevant but limited instrument

Actually accessible to coaches and solo self-employed persons as funding recipients is the ESF Plus programme KOMPASS:

> **BMAS / ESF PLUS, KOMPASS PROGRAMME**
>
> up to 4,500 € in funding for further training courses of at least 20 hours' duration under the KOMPASS programme for solo self-employed persons — requirement: at least two years of market activity, self-employment as the main occupation.

BLOCKED	ACCESSIBLE
BAFA business consulting	**KOMPASS (ESF Plus)**
Excluded for coaches' and consultants' own positioning	Accessible to the solo self-employed, up to €4,500 per training

FIGURE 7 Accessible and blocked German funding instruments for coaches and consultants
Own illustration based on the BAFA Funding Guideline (2023–2026) and the BMAS/ESF Plus programme KOMPASS.

The funding scope of KOMPASS is dimensioned considerably smaller than the BAFA programme (up to 2,800 € per consultation, usable multiple times) and is geared towards further training rather than individual consulting services. Both programmes thus address different, each limited needs — neither of them is an instrument for the comprehensive funding of one's own reputation-building.

— Assessment

The data refute the thesis that small providers leave substantial funding sums for their own positioning unused out of ignorance — such an instrument simply does not exist to any significant extent in the German funding landscape for one's own consulting activity. What is true, however, is this: the complexity and fragmentation of the funding landscape — different programmes for different target groups, regionally varying funding rates, changing funding periods — hampers the systematic use even of the actually accessible, smaller instruments such as KOMPASS.

IX

CHAPTER IX

Synthesis

Connection to the G-House Trust & Authority Report 2026

The economic findings presented in this study — market polarisation, the low effectiveness of classic visibility measures, the limited eligibility of one's own positioning for funding — can be combined with the theoretical framework of the G-House Trust & Authority Report 2026 into a coherent overall picture.

From finding to explanation

Drawing on international trust research (Edelman Trust Barometer 2026, Andres et al. 2025, Edelman-LinkedIn B2B Thought Leadership Report 2024/2025), the Trust & Authority Report 2026 shows that trust in expert markets arises primarily through third-party validation — not through self-assertion or reach. The present study provides the economic counterpart to this: providers without institutional and media anchoring grow more slowly economically or stagnate, regardless of their marketing activity.

FINDING TRUST & AUTHORITY REPORT 2026	CORRESPONDING FINDING EXPERT INCOME REPORT 2026
Self-assertion has no credibility effect (Spence 1973)	Self-promotion/social media is among the least effective marketing instruments (RAUEN 2024)
Third-party validation is the most efficient transfer of trust	Warm acquisition and personal referrals achieve the highest success rate in winning business
81 % of Germans display an insular attitude towards trust	Small, new providers without network anchoring are under heightened economic pressure (BDU)

FINDING TRUST & AUTHORITY REPORT 2026	CORRESPONDING FINDING EXPERT INCOME REPORT 2026
The Authority Gap is measurable	The income and growth spread between large and small providers is empirically documented (BDU 2025/2026)
Reach and trust are decoupled	High visibility activity does not correlate with a high conversion rate (RAUEN 2024)

Own synthesis based on the primary sources cited in both studies.

— The Authority Gap as an economic magnitude

The Trust & Authority Report 2026 introduces the concept of the Authority Gap — the gap between professional competence and publicly attributed authority. The present study shows that this gap is not only a phenomenon of perceptual psychology, but an immediately economic one: it correlates with measurable differences in revenue growth, fee levels and conversion rates between institutionally anchored and non-anchored providers.

»

It is not professional competence but the publicly perceptible and externally validated authority of an expert that is the primary driver of trust — and thus of purchasing decisions — in markets with high information asymmetry.«

CENTRAL FINDING OF THE G-HOUSE TRUST & AUTHORITY REPORT 2026

The present study supplements this finding with the economic dimension: this authority gap is not only a perceptual phenomenon on the client's side, but demonstrably manifests itself in the income, market share and growth dynamics of the providers concerned.

— An important distinction

At this point a clarification is necessary that is central to understanding the entire study: the economic polarisation documented here cannot, with the available data, be attributed to the individual failure of particular providers. It is a market effect that arises from the combination of structurally high information asymmetry (Akerlof 1970), low barriers to market entry and the described decoupling of visibility and trust. This study thus provides no moral evaluation of the industry, but a data-based explanation of a market phenomenon — and, derived from it, objective options for action.

X

CHAPTER X

Conclusions

and implications for action

From the synthesis of the empirical findings, eight conclusions can be derived.

1 — The overall market is growing, the distribution is unequal

The German consulting and coaching market is in a growth phase. This growth, however, is increasingly concentrated on larger, institutionally anchored and specialised providers.

2 — Professional qualification is necessary but not sufficient

The available data provide no indication that small providers are less well qualified professionally than large ones. The income difference cannot be explained primarily by a gap in competence.

3 — Classic visibility marketing is economically inefficient

Marketing instruments with a low reproduction barrier (social media, self-promotion) achieve the lowest documented success rates in winning business.

4 — Network and third-party-validation trust is the most effective lever

Warm acquisition, personal referrals and third-party media validation show the highest effectiveness across all the studies evaluated.

5 — The German funding landscape does not address this problem

Central funding instruments (BAFA) are structurally inaccessible to consultants and coaches for their own positioning; available alternatives (KOMPASS) are small in scale.

6 — The Authority Gap is a measurable economic magnitude

The gap between professional competence and externally validated authority correlates with documented differences in revenue growth and fee levels.

7 — Reputation-building is a long-term investment, not a campaign project

The data evaluated on fee development by professional experience (RAUEN 2024) point to a cumulative reputation effect over years, not to an effect achievable in the short term.

8 — Structured reputation-building is an economic, not merely a communicative, decision

According to the available data, investments in institutional anchoring, third-party media validation and robust networks are more directly linked to economic success than investments in classic visibility measures.

9 — The Authority Gap begins as early as data collection

Providers in the life counselling and personal development segment are underrepresented not only in the market but already in market research itself. This double visibility disadvantage further intensifies the effects described in Chapters III to VI, but cannot be quantified with the available data.

10 — Legal robustness is part of reputation economics

The BGH case law consolidated since 2025 on the nullity of unaccredited online coaching contracts shows that structural weaknesses in the business model can rebound on providers not only economically but also legally. A valid reputation architecture includes this legal dimension.

XI

CHAPTER XI

Conclusion

The income gap as a market structure

Drawing on published market and income studies, this study has analysed the economic reality of coaches, trainers and management consultants in Germany. The evidence permits a clear, data-based conclusion:

> **CENTRAL FINDING OF THE EXPERT INCOME REPORT 2026**
> The German expert and consulting market is growing — but the growth disproportionately reaches those providers who possess institutional anchoring, third-party media validation and robust networks. Professional qualification alone does not explain the documented income and growth spread.

This finding does not mean that professional quality is irrelevant — it remains a necessary precondition of any reputable consulting or coaching service. But in a market with low barriers to entry, high provider density and structural information asymmetry, the quality of trust signals increasingly determines economic success — not the quality of the underlying service alone.

For individual providers this means: the economically most effective investment is not necessarily in more reach, but in comprehensible, externally validated authority — through media anchoring, institutional integration, professional publication and robust networking. This aligns with the central thesis of the G-House Trust & Authority Report 2026 and is underpinned economically by the market and income data brought together in this study.

This is not a normative finding. It is a description of the market structure as evidenced by the available data.

CHAPTER XII

XII

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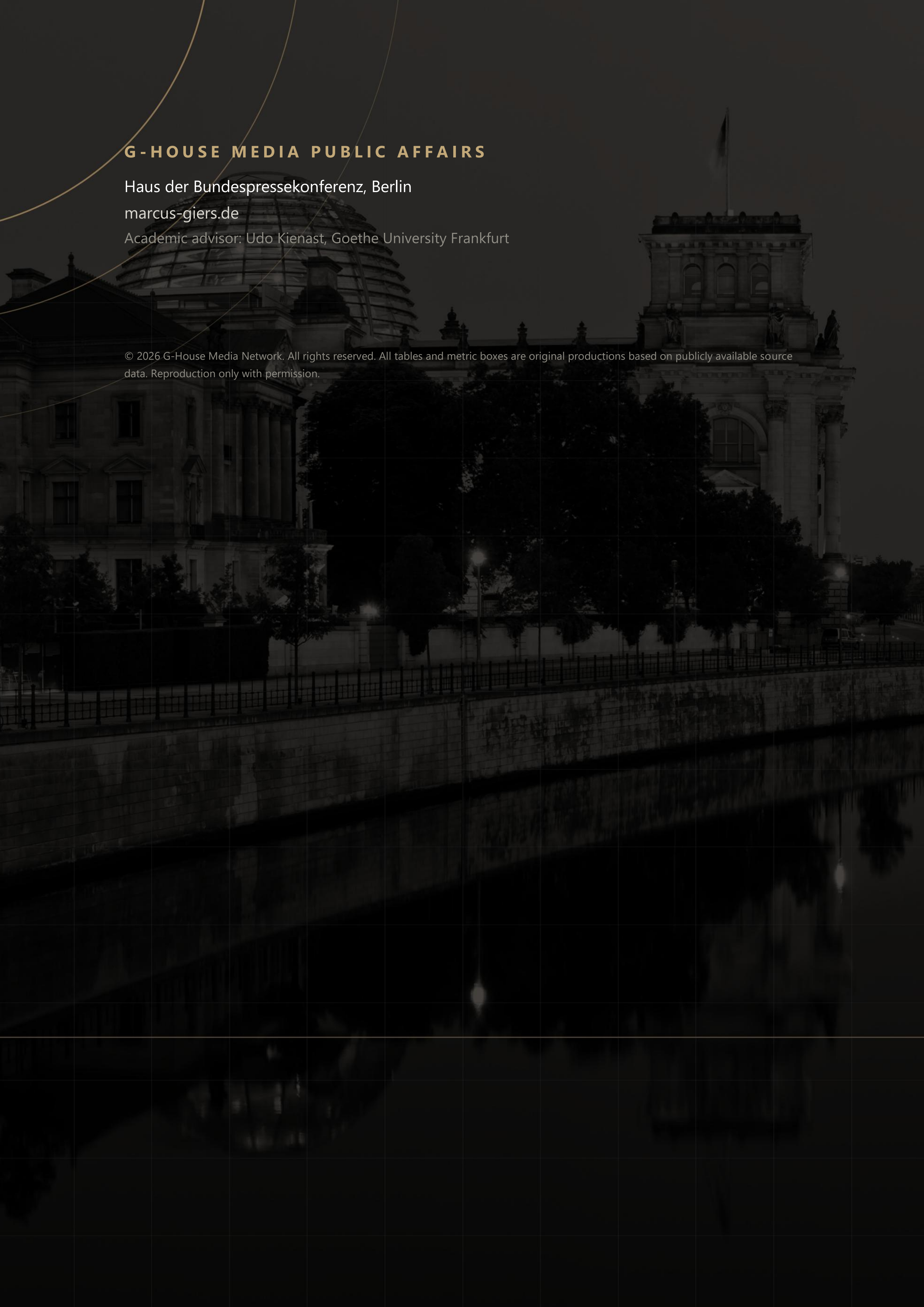

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