This document is an Executive Summary of the 13th annual Sherpa Executive Coaching Survey report. It is offered as a service to the coaching industry, to help coaches and clients understand our business.

The complete research report is available in hard copy only, from the ‘Books’ section at the Sherpa Coaching online store.

The Executive Summary that follows highlights some key findings and summarizes some of the detailed information contained in the full report.
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Welcome to the 2018 Executive Coaching Survey.

This market research is a service of Sherpa Coaching, a team of coaches, authors, educators, and researchers working across the world via telepresence, and based in Cincinnati, Ohio, USA. Your research team consists of Karl Corbett, Managing Partner and Joseph Valeri, Research Executive at Sherpa Coaching along with Shawn Herbig and his IQS Research organization.

This year’s research is sponsored by:

- University of Georgia Center for Continuing Education, Athens
- University of New Mexico Anderson School of Management, Albuquerque
- Howard University School of Business, Washington, D.C.
- Sherpa Coaching, Cincinnati, Ohio
- Training Impact Leadership Expeditions, Lahore, Pakistan
- EXCO, the 13th annual Executive Coaching Conference

This year, as always, we polled executive coaches, business coaches, clients, HR and training professionals, and a wider group of professionals with an interest in leadership development. All data about coaching in this report comes from executive coaches only, unless labelled otherwise.
What Is Executive Coaching?

With thanks to our sponsors and supporters, the Executive Coaching Survey is a market research project now in its thirteenth year. Through this market research, you will discover how to make the most of coaching as a service for your organization – or as a career for yourself.

What exactly is Executive Coaching? Let’s draw some distinctions between two general areas of discipline: ‘executive coaching’ and ‘business coaching’. What are some of the differences in emphasis, focus, and training between these two types of coaching?

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Business coaching is an alternative term for consulting, as research shows:

“Many business coaches refer to themselves as consultants, a broader business relationship than one which exclusively involves coaching.”


We ask respondents to identify themselves, with two of the choices being: business coach (working to develop client’s knowledge and skills) or executive coach (working to permanently enhance business behavior).
Defining the Industry

To gather insightful and useful data we need to distinguish between coaching, training, consulting, and other professional positions. It also allows us to separate and analyze answers that come specifically and exclusively from executive coaches. We can make direct, factual comparisons between different types of professionals.

So, let's focus specifically on executive coaching and what it means.

We need a clear, academically sound definition of the role of an executive coach. Early on, a major trade association described coaching as something that would: “...produce extraordinary results” and “...enhance quality of life.” However, the definition can’t be promotional or guarantee specific results, so that language didn’t last long.

An accurate and viable definition of executive coaching should provide specific information that distinguishes it from other coaching – such as life, sports, fitness or business coaching.

The most widely accepted definition of executive coaching defines it as "regular meetings between a business leader and a trained facilitator, designed to produce positive changes in business behavior in a limited time frame.” *

This definition of executive coaching clarifies:

- **Who** coaches are: trained facilitators
- **What** coaches do: produce positive changes in business behavior
- **When** things happen: on a set schedule within a limited time frame
- **How** they do it: through regular ongoing meetings

Hot Topics

**Delivery and Technology** will remain a hot topic for one simple reason. Technology is always changing, and the way coaches deliver services will change to reflect it. With various forms of video conferencing (32%) accounting for nearly as much coaching as face-to-face meetings (35%), it’s vitally important to stay current. Coaches, clients, and all business professionals look to utilize all forms of service delivery to best accommodate everyone’s needs. We will analyze the latest market trends so you can stay current.

**Strengths vs. Weakness** – While it’s not an either-or situation, some coaches prefer to focus on strengths while others look more at weaknesses. While three quarters of coaches overall tend to work on appreciative inquiry, HR and training professionals are more likely to work on deficits. Older coaches – who always lead the way – also tend towards weaknesses. We will investigate some of the nuances of this unique data set in this section.

*Find detailed analyses of these sections in the full report*
Delivery of coaching services goes hand in hand with emerging technology. In their 2005 book “The Sherpa Guide: Process-Driven Executive Coaching,” Brenda Corbett and Judith Colemon wrote: “Technology has added another option for coaching, that of point-to-point video.... Over time, the quality of sound and images will only improve, making coaching over the Web more and more like a live meeting.” That day has certainly arrived.

Coaches can deliver their services any number of ways, including: in person, by phone, by videoconference, and more. As we investigate these methods of service delivery we analyze two factors: how many coaches use a given method; and how much of their coaching is conducted that way.

Let’s look at a hypothetical example. One coach conducts meetings entirely in person. Another works in person half the time while using the phone for the other half. We can describe this small sample by saying 50% of coaches use the phone (at some time or another), and that 75% of all coaching is delivered live.

What observations can we make from the 2018 executive coaching survey data?

Technology has changed the way coaches and clients interact. We first reported the use of webcams and applications such as Skype in 2007, before anyone was using it to deliver coaching services. Between 2011 and 2012, use of these methods exploded. Now, more than half of coaches and clients experience webcam coaching to some extent, and nearly a quarter (24%) of all coaching services are delivered that way.
Delivery and Technology

In 2012 we separated “HighDef videoconferencing” from Skype and other “LowDef” webcam video tools, and about 4% of coaching was delivered this way. Now that number has doubled to 8%. Large screen, high definition systems deliver consistently high image quality, synchronized audio and video, and real-time delivery, without lags or dropouts. High definition studios are becoming more widely available to coaches and clients at larger firms and shared office centers.

In 2018, LowDef and HighDef video conferencing tools now account for nearly a third of all coaching (32%). Videoconferencing has replaced some in-person meetings. Face-to-face coaching has declined from about 45% to 35% over the last decade. It has leveled off in recent years, and we’ll continue to observe if it falls, rises, or remains steady in the future. But is videoconferencing really replacing in-person meetings?
Strengths versus Weaknesses

Extended analysis available in the full report

There are two basic schools of thought in coaching. One approach involves identifying and working with strengths. The other focuses on identifying and correcting weaknesses, or deficits. Let’s look at the differences between strengths coaching and weakness coaching.

Strengths

Advocates of strengths-based coaching, drawing from positive psychology, will say: “Know your strengths, craft your life around them and you will be happier, more productive and reach your goals. Positive psychology supports change by focusing on positive emotion and core strengths -- rather than negative emotion and overcoming weaknesses”.

Weaknesses

The weakness-based approach says: “Your strengths have gotten you where you are. Dealing with weaknesses in behavior is the only way to get to the next level.” Advocates of the weakness approach include Marshall Goldsmith and ‘Sherpa Guide’ author Brenda Corbett, who writes: "Often, a client has reached a plateau with his strengths, but is stuck because of his weaknesses.”

Although it’s not an either-or situation, which approach did the 2018 Executive Coaching Survey find is favored?

Coaches can use aspects of both approaches, but 75% favor working with strengths rather than weaknesses. That number is up from 70% two years ago.
**Strengths vs. Weaknesses**

Internal and external coaches are equally likely to favor the strengths approach.

Four times as many women work on strengths rather than weakness (80%), while two out of three men (34%) work with weaknesses.

If earnings are a reflection of effectiveness, then we should look at billing rates, and see which approach earns the most money:

- **21%** - of coaches who charge under $300 an hour and under work with weaknesses.

- **27%** - of coaches who charge $301-500 an hour work with weaknesses.

- **50%** - of coaches who earn $1,000 or more work with weaknesses.
Landscape of Coaching

When this research started in 2005, the field of executive coaching was still in its formative years. Hundreds of coaching schools opened and closed. Trade organizations came and went. The role and definition of coaching remained poorly defined. Coaches themselves were confused about what they did – and what exactly to call it. Since then, the industry has matured, developing some standards and constants along the way. We’ll examine four topics in this section, The Landscape of Coaching.

**Age and Tenure** have settled into some constants as the industry has matured. Coaches tend to be older: for the past 3 years at least 55% of coaches were over 55 years old. And coaches tend to be sticking around: a majority of all coaches have been coaching for over 10 years. What does this mean for new coaches breaking into the game? We’ll look closer at this data to provide relevant analysis for all business professionals, whether they’re internal coaches, external, HR staff, or senior executives.

**The Purpose of Coaching:** Who needs an executive coach most? Is it up-and-coming leaders seeking development? Individuals with a specific problem or challenge to address? What about those in job transition? This is an area that we have seen significantly affected by changes in the world economy over the years. It’s a great indicator telling us why purchasers of coaching services are seeking them. In recent years, a majority of coaching services were used to provide leadership development, peaking at 61% in 2016. We’re starting to see a slight change in this area, so let’s investigate what the data is telling us.
The Landscape of Coaching

We introduced a new concept in last year’s annual Executive Coaching Survey Report: Coaching Constants. Some areas of coaching have become established standards of practice. In the early days of coaching, neither its value nor credibility was particularly high. It took time for it to catch on. But once it did, we haven’t looked back. Over the past several years nearly 100% of all survey respondents indicated that the value of coaching was perceived as somewhat or very high. In fact, we stopped asking this question all together!

Standards of Practice: Do different kinds of coaches model their practice on published processes? What kind of standards have emerged as the coaching industry has matured? Some aspects of coaching seem to have reached a point of standardization – such as whether or not coaches use assessments and which ones they use – while others have not. In this section we look for long standing trends over time that level off and define areas of the coaching industry as standard.

Find detailed analyses of these sections in the full report
What Coaching Clients Want

**WHAT CLIENTS WANT**

*Where Coaching Produces Value:* Although people may want different things from coaching, they generally all want a positive impact on business. Clients want to see lasting results and permanent change. What does this really mean? How can executive coaching best be applied to different types of professionals in different situations? Where do people think coaching can produce the most results? Is it effective for change management? What about succession planning?

*Demand for Coaching:* A majority of business professionals expect the demand for coaching to increase. This has been true for a while. But this high level of expected demand has slowed in the last two years. Will the market for coaching level off in the coming years?

*How Buyers Find a Coach:* Although this area of the industry has almost become a Coaching Constant, it stills remains worth asking about. As we’ve seen in other areas of coaching technology can swoop in and change things quickly in a matter for years. Clients, executives, HR staff, etc. can all find coaches in different ways, from web searches and personal networks to social media and referrals. This section of the report will keep you informed on all the different ways coaches are found by clients.
What Coaching Clients Want

Who Gets a Coach: Coaching can be an extremely valuable resource. Organizations that use executive coaches would love to have one-on-one coaching throughout the organization, but that’s seldom feasible. Instead, valuable coaching resources – whether in-house coaching staff, or hired externals – must be allocated as best as they possible can. In the past coaching was spread throughout an organization, but in recent years has become more of a mark of up and coming leaders. What does the 2018 data say?

Measuring the Benefits: It became clear early in the coaching industry that no one could really evaluate the value of coaching without attempting to measure the benefits. Nearly all coaches and clients want to know the results of their coaching engagements, and there are numerous ways business people are doing this. From performance reviews to Marshall Goldsmith’s 360 Feedback method, from traditional ROI formulas to the more contemporary Impact on Business formula – how are people measuring the benefits of coaching?

Find detailed analyses of these sections in the full report
Demand for Coaching

Extended analysis available in the full report

Most professionals in the industry expect demand for coaching to increase. At its high point in 2012, a third of professionals expected demand to increase substantially.

From 2011-2015, more than three quarters of business professionals thought coaching demand would increase to some degree. No one expected a decrease: less than 5% each year thought coaching demand would decrease slightly or substantially.

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But this high level of expected demand has slowed. Expectations of demand have finally leveled off after years of increase. In recent years (2011-2016) over 70% of people in business thought demand would increase, but in the last two years those expectations have slowed.

For the first time since we started asking this question, a third of people actually think demand will stay the same or decrease in 2018. The number of people expecting demand to stay steady or drop has gone from 21% in 2015 to 33% in 2018. Business professionals as a whole are finally seeing things slow down.
How Buyers Find a Coach

Executive coaches, like any other service professionals, must connect with their clients. There are time-honored traditions, and brand new ways to communicate a message and build a network. Some ways of ‘spreading the word’ are free. Others come at a cost. Every method takes time and energy.

How do people actually find their coaches? The market tells us that people find coaches through ‘personal references’ a vast majority of the time. They also use web searches, trade associations, service brokers and LinkedIn. Personal references, however, are used ten times more often than any other method. Here are our four-year averages, with little change seen across the time frame.
Measuring the Benefits

Extended analysis available in the full report

The only way to gauge whether results are improving is to measure them. How do business leaders measure the benefits of coaching?

Results this year are just about the same as last year’s data. Perhaps, in the near future, we can move this topic to the ‘Coaching Constants’ section of our report.

360 Feedback, a before-and-after method pioneered many years ago by Marshall Goldsmith, is used most, 29% of the time. Other common methods include ‘Well-being and Engagement’ and ‘Performance Reviews,’ which are each used around 20% of the time. Our 2018 survey found our newest measure, IOB (Impact on Business), in fourth place, with traditional ROI and ‘Effectiveness of Learning’ at the bottom of the scale.
Measuring the Benefits

With so many different methods in use it can be helpful to see which type of professionals use which methods. Do all professionals use the 360 Feedback method most? Who uses Performance Reviews or Impact on Business?

The 2018 survey shows that HR, training, and other professionals actually prefer to measure the benefits of coaching through IOB: Impact on Business. They use it 24% of the time while executive coaches only use IOB 14% of the time.

We can look for a future trend by breaking the data out by tenure. Do newer coaches tend to use any method more than the general average? They do: they use IOB more than twice as often as more tenured coaches.
Stanley Black & Decker, a client of Sherpa Coaching, has firmly proven the benefits of executive coaching by way of performance reviews. After years of coaching, they have a large enough pool of executives who have received coaching that they can compare this group with those who have not received coaching.

Fully 15% of executives who have been coached went from ‘met most / all goals’ to ‘exceeded some goals’. Another 15% moved from ‘exceeded some goals’ to ‘exceeded most/all goals’, as shown below. These findings were presented in 2017 at EXCO, the Executive Coaching Conference in Cincinnati, Ohio USA.
Coaches’ Earnings: How often do various coaches work, how much do they get paid, and how much are clients willing to pay for coaching services? These basic numbers plus a few others combine to form our analysis of Coaches’ Earnings. This section can serve as a gauge for both entry-level and tenured coaches to see where they fit in the grand scheme of things, financially. This year’s data indicates good news for some coaches and not so good news for others.

Executive Coach, Business Coach: We define executive coaches as those working on business behavior. Business coaches – or consultants – help clients with specific business knowledge or skills. 69% of this year’s survey respondents identified themselves as executive coaches, with 11% as business coaches. In this section we will look closer at the demographics, earnings, and various other differences between the two.

Internal and External Coaches: We can split executive coaches into two categories: internal vs. external coaches. Internal coaches work within their own organization to coach executives, team leaders, management, and other fellow employees. Externals generally work independently, and often must work on promoting their own business and generating client engagements. Their roles are similar in many ways, yet several differences also exist. We will explore all of this in the pages that follow.
Executive Coaching As A Career

**How Coaches Market Their Services:** The landscape of marketing and self-promotion has changed in recent years. Personal, professional, and social networks allow for direct connections that were only recently made possible. Coaches can market their services in any number of ways, and purchasers can find what they need through various channels. Sherpa research has created a proprietary ranking system that analyzes all methods of marketing, from LinkedIn to Internet ads, from Twitter to direct mailing. We can tell you how many are using each method, how many plan to, and how successful their efforts have been.

**The Coaching Confidence Index:** The Coaching Confidence Index is another unique and proprietary Sherpa research ranking system. With 13 years of earnings changes, supply and demand data, number of clients, and more, we can provide an all-encompassing “state of the industry” index for coaching. How do things look compared to last year’s Coaching Confidence Index?

*Find detailed analyses of these sections in the full report*


Coaches’ Earnings

Extended analysis available in the full report

Each year, we ask executive coaches how much they charge, and ask clients how much they pay, to get a real sense of the market value of coaching. Coaches outside the United States converted their rates into U.S. dollars for this aggregate report. We also ask about client caseloads, so we know how much time coaches spend in service delivery.

The following earnings figures are for time spent coaching. Earnings a coach might have from training, consulting, speaking and other activities are not factored in.

Here’s a snapshot:

**Hourly earnings: Global figures for 2018**

Executive Coaches:
$386 USD per hour, up from the $350-$360 range the last three years.

Business Coaches:
$279 per hour, up from $235-$245 the last three years.

Life Coaches:
$190 per hour, unchanged for the last three years.

**Annual earnings: Global figures for 2018**

Executive Coaches:
$104,700 USD, up from the $90 – 95K range the last three years.

Business Coaches:
$61,000, up 10% from three years ago.

Life Coaches
$37,000, down sharply over each of the last two years.

*Note: although the dollar rate charged for an hour of coaching services has gone up 40% over the last 12 years, the actual value of the money received has only risen 7%, due to inflation.*
For years, we have asked coaches to identify themselves as either:

Executive coaches, those who work on business behavior, or
Business coaches, who help clients develop knowledge and skills.

The role of the business coach can also be described as consulting, a term we will use in this report, for clarity’s sake.

Here’s who weighed in for our 2018 report:
Internal and External Coaches

Extended analysis available in the full report

We can split executive coaches into two general categories: *internal* and *external*. Let’s review how their roles differ.

What image comes to mind when you picture an executive coach? Most are outside experts. These *external* coaches – often from a one-person shop – offer independent services to several client companies. They are professionals assigned to provide coaching to employees of various organizations and businesses. Ninety-four percent of coaches this year described themselves as external coaches.

As internal coaches gain experience and seniority, they can take on higher-level assignments, working with top leaders in an organization. Often, however, their reach is limited as an employee. As time goes on, many internal coaches go independent, to take full advantage of their experience.

The following comments highlight trends for internal and external coaches:

*The need for and recognition of coaching as a powerful development tool is growing. The ways in which coaching will be delivered is changing. Internal organisational offerings are growing with external coaches used more as an exception. Executive Coach, London.*

*I am part of a large team of internal coaches; demand for our services is largely based on transitions (promotions and executive hires). The numbers of these moves is forecast to be about the same in 2018 as this year. – Executive coaches – Los Angeles*

Three out of four internal coaches are women. Women still dominate among the ranks of external coaches, at 57% of the total, down slightly from last year.

More than one in four internal coaches are 45 years of age or younger. Only 7% of external coaches fall in the lower age bracket. The average age of an internal coach is 50, while external coaches average out to age 55.
How Coaches Market Their Services

Extended analysis available in the full report

There’s nothing like networking to build more business for an executive coach. Our research proves it, and a coach in Washington, D.C. confirms it, saying: “I don't believe we've reached the tipping point yet as a field. Every time I coach someone, it generally yields a referral of someone who had never considered coaching.”

Our marketing ‘bullet points’ for 2018 include:

- Promotion is important, according to many coaches. 40% say it’s ‘important’ or ‘very important’.

- Ads aren’t working, with only 15% saying they are ‘effective’ or ‘very effective’.

- People aren’t getting outside help with their promotion, with just 10% using a marketing consultant.

There’s a bit of a contradiction here. Many consider promotional strategy to be important, but very few use outside help – even though most admit their marketing is ineffective.
Highlighted Comments

Here’s what coaches told us for our 2018 report:

“More people and organisations are understanding the value of coaching and its benefits to productivity.” – External coach – UK

“Those in the know who have benefited from coaching will encourage others to seek out coaching.” – Financial Coach – Northern California

Many other coaches, HR staff, and business professionals echoed the same thoughts. Several also pointed out that these lasting changes go beyond the business world and create improved relationships and successful endeavors in other aspects of life.

Comments like these showed up extensively throughout the 2018 annual survey. Finally, this comment, from a business professional in Calgary, Canada, touches on all three of these themes. The benefits of coaching include gaining

“self-awareness which translates into effective behavior, on-the-job application, and life fulfillment.”
This report is about executive coaching. You’d expect most of our contributors would be executive coaches. That proves to be the case once again this year, with seven in ten respondents describing themselves as ‘executive coaches, working on business behavior’.

How accurate is this survey? This year, 700 people responded to this survey, providing a margin of error of under 3.8%. The accuracy of the survey’s conclusions is also confirmed by comparison with responses from previous years, allowing the confirmation of trends over time. Based on an ever-increasing body of knowledge, this 2018 report can share changes and trends available nowhere else.

This survey gets information from a wide variety of people. We do not control or limit who participates. There are no user-specific invitations with passwords and the like.

Anyone who wants to participate in this research can do so.
Anyone can invite others to participate.
Anyone can provide anonymous answers.

We always invite people who took the prior year’s survey, so our answers year to year reflect trends based on answers from the same people.

People share our invitations, ensuring a free flow of information and a sample that fully represents the world of executive coaching. As always, almost half our respondents come from outside our list of invitees. That ensures fresh and accurate results, year after year.