This document is an *Executive Summary* of the 14th 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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Research Services from Sherpa Coaching

Discover what your organization really needs. (513) 232.0002 for a free consultation.

38% Corporate Culture 80% Team Culture 57% Women in Leadership
Comments and Highlights

Extended analysis available in the full report

Fact #1
Only 4% of organizations have reported an excellent mentoring program in place.

Fact #2
For the first time, more HR & Training professionals

Fact #3
Although 89% of organizations recognize the potential benefits of mentorship, there remains a significant gap in the implementation of such programs.

Find more in the full 85 page report
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Welcome to the 2019 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, GA
- Howard University School of Business, Washington, D.C.
- Sherpa Coaching, Cincinnati, OH
- Training Impact Leadership Expeditions, Lahore, Pakistan
- EXCO, the 14th 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 this data set and subsets, such as executive coaches only, as labelled.
What Is Executive Coaching?

With thanks to our sponsors and supporters, the Executive Coaching Survey is a market research project now in its fourteenth 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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<thead>
<tr>
<th>Executive Coaching</th>
<th>Business Coaching</th>
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<tr>
<td>Business Behavior</td>
<td>Strategy and Tactics</td>
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<td>Soft skills</td>
<td>Hard skills</td>
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<td>includes: communication</td>
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<tr>
<td>Personal development</td>
<td>Performance</td>
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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, mentoring, and other professional positions. This 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 what executive coaching means. An accurate and viable definition of executive coaching offers specific information that distinguishes it from other coaching – such as life, sports, fitness or business coaching.

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

INFO
2019

Hot Topics | 2019

Delivery and Technology
Technology is always changing, and the way coaches deliver services will change to reflect it.

Strength vs. Weakness
While it’s not either-or, some coaches focus on strengths while others look at weaknesses.

Women in Leadership
An industry standard look at a ‘cutting edge’ topic, women in leadership.

Mentoring
For the first time, we review the successes and failures of mentoring.

Hot Topics

SHERPA COACHING
Hot Topics

**Delivery and Technology** – The way in which services are provided 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 now surpassing face-to-face coaching, it’s vitally important to stay current. Coaches, clients, and all business professionals look to utilize every form of service delivery to best accommodate everyone’s needs – especially internet and HD video. We will provide the latest market trends so you can stay current.

**Mentoring** – Although the roles of an executive coach and that of a mentor often exist to help orient and guide workplace relationships. This year’s annual report marks the first time we have investigated this area in detail. This new section of the report will start to paint a picture of the landscape of mentoring programs.

**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 continue to be more likely to work on deficits. Older coaches whose training took place a long time ago also tend towards weaknesses. We will investigate some of the nuances of this unique data set in this section.

**Women in Leadership** – Last year we compiled an industry standard look at an important topic, we'll provide a separate stand-alone report. Taking a look aimed at the topic of gender diversity in leadership, we’ll provide a specific set of questions introduced to the annual survey in 2017. How do perceptions differ by age and type of professional? A majority of executive coaches are women and the data provides valuable insight.

- A professional from Scotland made a comment that we heard echoed by others in the 2019 Survey: “I feel that coaches will continue to be used as change agents; however I see organisations using them for coping with stress and resilience. This is a growing market.”
We first reported the use of webcams and applications such as Skype in 2007, when coaches were first starting to use this medium. Between 2011 and 2012, use of these methods exploded. Now, most coaches and clients experience webcam coaching to some extent, and a third of all coaching services are delivered that way.

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 more than doubled. 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.

At the same time, lower definition video capability improves constantly. Connection speeds get faster; video quality increases; clients and coaches gain familiarity. This type of video conferencing has also increased significantly since 2012: from 15% to 25%.

Older technologies, like telephone and email, are still being used as well. In fact, those numbers aren’t decreasing. Telephone has stayed around 25% and email has leveled off around 8%. Could video tools be replacing some face-to-face meetings?

### Delivery Methods used since 2012

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<td>In-person meetings</td>
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<td>Email, chat, text</td>
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<td>Web video, Skype, etc.</td>
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<td>High Def video</td>
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Mentoring is a way for colleagues to help each other grow in a professional setting through a relationship that provides guidance.

“Mentoring has become an effective method for businesses to help employees with orientation, career advancement, problem solving, coaching, and support. In addition, mentors can assist employees to deal with the challenges associated with successful, productive, meaningful work life.” – www.mentors.ca

Organizations provide a variety of types of mentoring programs to help employees with career advancement and orientation, with veteran employees “showing the ropes” to new employees.

For the first time, we’ve added a section about Mentoring to the Executive Coaching Survey. Let’s differentiate some distinctions between mentoring and coaching.

- Mentoring tends to be more situational and informal, though longer lasting than a short-term weekly coaching engagement.
- Mentoring is career focused and involves organizational and culture knowledge – as opposed to certified coaching focused on behavior.
- Mentoring is a form of apprenticeship and may deal with personal issues.
Strengths versus Weaknesses

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 2019 Executive Coaching Survey find is favored?
Strengths vs. Weaknesses

Fast Facts | 2019 | Strengths/Weaknesses

External coaches are more likely to work with strengths than internal coaches – 73% to 63%.

Women are more likely than men to favor a strengths approach – 76% to 67%.

Both UK and South African coaches tend strongly towards strengths.

More weaknesses coaches can be found in Canada and the Midwest US.

Coaches under 45 are nearly split down the middle.

Percentage that favors the strengths approach worldwide
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 broad topics in this second section.
**Landscape of Coaching**

**Age and Tenure** – These demographics have settled into some constants as the industry has matured. Coaches tend to be older: for the past 3 years at least 60% 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, but it has leveled out recently. 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.

**Coaching Constants** – Some areas of coaching have become established and constant. 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. 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**.

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**Find more in the full 85 page report**

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- 38% Corporate Culture
- 80% Team Culture
- 57% Women in Leadership
Age and Tenure

The following two charts tell a remarkable story.

The data above shows the coaching industry maturing over the years, as coaches entering the field in the 1990’s and early 2000’s moved “up the ranks.”

The snapshot to the right shows the same trend continuing today, while still allowing for new entrants to the industry of coaching.

Find more in the full report.
What Clients Want

Where Coaching Produces Value
Where do people think coaching can produce the most results?

How Buyers Find a Coach
Clients, executives, HR staff, etc. can all find coaches in different ways,

Demand for Coaching
A majority of business professionals expect the demand for coaching to increase.

Measuring the Benefits
Nearly all coaches and clients want to know the results of their coaching engagements.

WHAT 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? What about succession planning?

Demand for Coaching – A majority of business professionals expect the demand for coaching to increase and has slowed in recent years. Will the market for coaching level off or even decline in the coming years?

How Buyers Find a Coach – Although this area of the industry has almost become a Coaching Constant, it still remains valuable to discuss. As we've seen in other areas of coaching, technology can swoop in and change things quickly in a matter of years. Clients, executives, HR staff, etc. can all find coaches in different ways, from web searches and personal networks to social media and referrals.

Who Gets a Coach – Coaching can be an extremely valuable resource. Organizations that use executive coaches would love to have one or two 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 possibly can. In the past, coaching was spread throughout an organization, but in recent years it has become more of a mark of up and coming leaders. What does the 2019 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?
Demand for Coaching

Extended analysis available in the full report

Most professionals in the industry expect demand for coaching to increase. During the peak of 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. Hardly anyone expected a decrease: less than 5% each year thought coaching demand would decrease.

But this high level of expected demand has slowed. Expectations of demand have finally leveled off after years of increase. From 2015 and ‘16, into the years circled below, we see a leveling trend.

- About two-thirds continue to expect demand to increase.
- About a quarter anticipate that demand will stay the same.
- Just a few have no opinion or expect a decrease.

What does this trend tell us about the future of coaching? Do we expect to see a downward trend eventually? Not at all. The current data still paints a bright picture, as the highlighted comments in the introduction demonstrate. Let’s look closer at the numbers.
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. We have seen very little change in this area in recent years. 2019 is no different, although it’s worth taking a closer look.
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 Assessments,’ 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,’ ‘Performance Reviews,’ and ‘Impact on Business,’ which are used 15-20% of the time. Some organizations also use ‘Return on Investment’ formulas and the ‘Effectiveness of Learning’ method.
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?

- Consultants and Life/Wellness coaches use Well-being and Engagement more.
- Executive coaches and Human Resources people tend to use the 360 method most.
- Impact on business is most used by executive coaches, about 17% of whom are using it to measure the benefits of coaching.

Do newer coaches and established coaches use different methods?

- New coaches are using IOB 46% of the time.
- 43% of coaches in 3-5 year range are using 360’s.
- The 360 method leads the way in the 6-10 and 10-15 year categories.
- The most established coaches use 360’s 35% of the time.
- Performance reviews are used less by newer coaches.
- Well-being and Engagement is used more often by veteran coaches.
Executive Coaching as a Career

COACHING AS A CAREER

The Coaching Confidence Index
We provide an all-encompassing “state of the industry” index for coaching.

How Coaches Market Services
Social networks allow connections that were only recently made possible.

Coaches’ Earnings
Entry-level and tenured coaches can see where they fit in financially.

Internal and External Coaches
Their roles are similar in many ways, yet several differences also exist.
Executive Coaching as a Career

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 Coaches or Business Coaches: We define executive coaches as those working on business behavior. Business coaches, or consultants, help clients with specific business knowledge or skills. 73% of this year’s survey respondents identified themselves as executive coaches, with 10% 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.

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 14 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?
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 of what we found for our 2019 report:

**Hourly earnings: Global figures for 2019**

**Executive Coaches:**

$398 USD per hour, up from $386 last year and $352 in 2017.

**Business Coaches:**

$251 per hour, down from last year’s average of $279.

**Life Coaches:**

$208, an increase over last year at $190 per hour.

*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.*
Executive Coach, Business Coach

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 2019 executive coaching report:

- 73% Executive Coaches
- 10% Business Coaches
- 6% Life Coaches
- 4% HR Professionals
- 7% Others
Internal and External Coaches

Extended analysis available in the full report

One way to split executive coaches is into these 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-five 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.

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**Age is Nothing but a Number:**

External coaches are more likely to be veterans while internals are more likely to be rookies.

22% of internals have been coaching for 2 years or less. Only 5% of externals are that new. Only 30% of internal coaches have been coaching for longer than 15 years. Significantly more external coaches (45%) have been around for that long.

Interestingly, coaches ages don’t vary as much as their experience level. While more external coaches than internal are older than 55, the percentages aren’t that far apart.
How Coaches Market Services

There’s nothing like networking to build more business for an executive coach. Our research proves it and coaches around the world know that good business generates more business.

Our marketing ‘bullet points’ for 2019 include:

Some coaches think it’s important to have a promotional strategy while others do not. More and more coaches think it’s not important at all:

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<td>How important is it to have a promotional strategy?</td>
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</tr>
<tr>
<td>1. Not at all important</td>
<td>16%</td>
<td>14%</td>
<td>11%</td>
<td>9%</td>
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Ads aren’t working, with 55% describing their ad campaigns as ‘only slightly effective’ or ‘not at all.’

As in years past, people aren’t getting outside help with their promotion: just 10% use 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. Why is this? How can things change? Should they?
Coaching Confidence Index

Extended analysis available in the full report

You might be a coach, or plan to become a coach. You may hire coaches or be a coaching client. No matter who you are, you need to know which direction leadership development is going. Sherpa Coaching can tell you ‘which way the wind blows’ like nobody else can. We base our analysis and projections on data from thousands of surveys you have given us to survey questions, going back to 2005.

You may have heard of the Consumer Confidence Index – a tool that measures the state of the economy based on consumer data. We’ve developed a similar tool to analyze the state of the coaching industry.

- Perceived value
- Optimism from coaches and clients
- Change in billing rates and the value of currencies
- Change in coaches’ workloads
- The state/direction of the economy

We received comments this year that reflect growing demand for coaching:
Participation

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 2019 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 by forwarding the invitation, unadulterated. Anyone can provide anonymous answers.

We always invite people who took the prior year’s survey, so our answers from 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.