

HENLEY BUSINESS SCHOOL

Trends in Digital and AI Coaching

Executive Report 2024

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This research was a partnership between Henley Business School and EMCC Global. We would like to thank the following organisations who supported the research:

- AceUp
- APECS
- Division of Coaching Psychology, British Psychological Society
- European Mentoring and Coaching Council
- EZRA
- LHH
- Sounding Board

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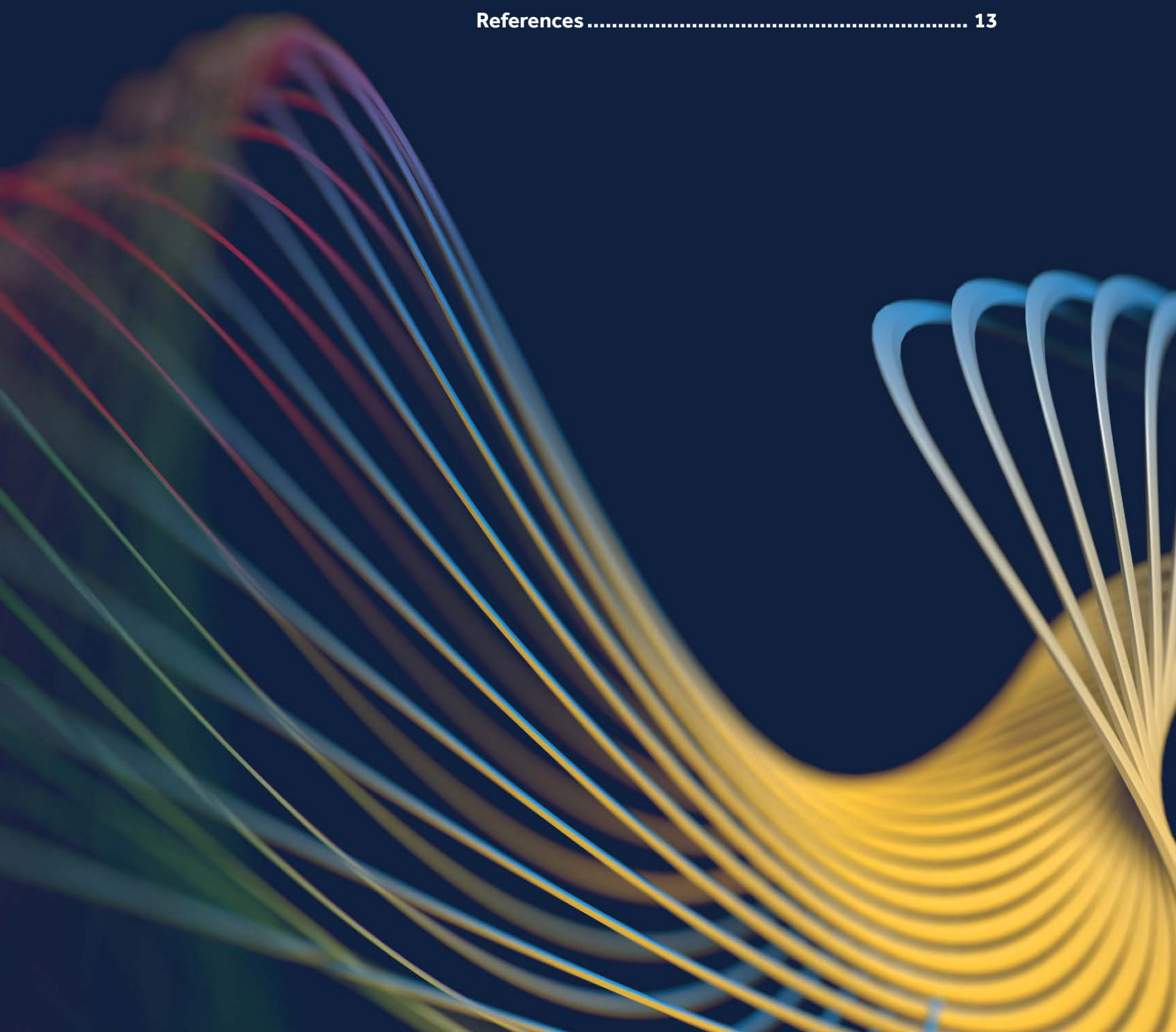
How to cite this report:

Passmore, J, Saraeva, A, Money, K & Diller, S J (2024) *Trends in Digital and AI Coaching: Executive Report*. Henley-on-Thames: Henley Business School and EMCC International

The data presented in this report is based on survey responses and thus reflects the collective views of those responding at the time of the survey, which was conducted during a four-week period in Summer 2023. University researchers and students may use the information contained in this report for their research and academic study. Commercial organisations must seek permission to reproduce any tables or associated information contained in this publication. If consent is granted, the report must be cited, and attribution given to the European Mentoring and Coaching Council (EMCC) and Henley Centre for Coaching. ISBN 978-1-912473-33-5

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Introduction

This report provides an overview of the main findings from the *Trends in Digital and AI Coaching* research project. It follows a series of other reports, published between 2017 and 2019 (Passmore et al, 2017, 2019; Terblanche et al, 2019), reviewing regional coaching trends in Africa, the Middle East and Europe, as well as a *Future Trends in Coaching* report from 2021 (Passmore). The present study was undertaken during a four-week period in Summer 2023.

Research methodology

The aim of the research project was to take a snapshot of the current views of coaches on digital and artificial intelligence (AI) landscape, and other trends in coaching.

The research aimed to collect responses from 500 professional coaches to provide a representative sample. 'Professional coaches' was defined as individuals who generate some or all of their income from providing coaching services to clients, or who are employed to deliver formal coaching as a regular part of their professional role.

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The research aims to take a snapshot of the current views of coaches about the digital and AI landscape

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The research questions were designed by the researchers in collaboration with the EMCC Research Committee, as well as with input from colleagues at Henley Business School. Our thanks are due to all those who contributed to the process.

The survey used a snowball method: the survey link was shared with EMCC and other partners who, in turn, shared it with their network. The survey started with a question about whether the individual earned part or all of their income from coaching, thus ensuring a focus on 'professional coaches' as opposed to professionals who use coaching skills (such as managers).

The questionnaire took, on average, 30 minutes to complete and, in addition to this report, the authors are publishing a series of journal papers exploring in more detail the themes arising from the research.

Research partnership

Henley Centre for Coaching, Henley Business School, UK

Henley Centre for Coaching is a research, coach training and continuing professional development (CPD) centre, based within Henley Business School. The Centre is recognised as a world leader for coach training and research, providing end-to-end coach training, in the form of its award-winning, accredited executive coaching programme, as well as its team coaching, supervision and manager-as-coach training.

European Mentoring and Coaching Council (EMCC)

The EMCC exists to develop, promote and set the expectation of best practice in mentoring, coaching and supervision across Europe and beyond, for the benefit of society. EMCC International is a council made up of countries providing coaching and mentoring membership in affiliated countries.

Research team

The research was undertaken by Professor Jonathan Passmore, in collaboration with Dr Anastasiya Saraeva, Professor Kevin Money, and Dr Sandra Julia Diller, with colleagues at Henley Business School and EMCC Global.

The research team would like to thank all the partner organisations who supported the research.

Section 1: Biographical information

A total of 556 responses were received across 52 countries, over the four-week period. Of these coaches, 98% provided biographical data.

Overall, data shows that coaching has made some progress in creating a more inclusive profession, although much more work needs to be done. The Henley report, *Racial Justice, Equity and Belonging in Coaching* (Roche & Passmore, 2021), called for action across the coaching eco-system to address issues of underrepresentation, with the aim of creating a profession that offers a community in which everyone feels they belong.

Gender identity, age and sexual orientation

The data on gender showed a division, with approximately 70% identifying as female and 29% male; 0.4% of individuals identified as a third gender/non-binary, while 0.6% preferred to self-describe.

The female–male division is comparable with other studies, although it is slightly higher than in previous studies, which generated figures closer to 65% female and 33% male (see for example, the research captured in *Future Trends in Coaching: Executive Report* [Passmore et al, 2021]).

In terms of age, the single largest group was between 50 and 64 years old (see Table 1), reflecting previous evidence that coaches are more likely older than wider society. In terms of sexual orientation (Table 2), approximately 88% identified as heterosexual, with 4% gay or lesbian and 1.6% as bisexual (6% chose not to state a sexual orientation).

Table 1: Age profile

Age	Per cent
18–29	0.5
30–49	30.25
50–64	56.8
Over 65	12.9

Table 2: Sexual orientation

	Per cent
Heterosexual/straight	87.4
Gay/Lesbian	3.8
Bisexual	1.6
Pansexual	0.5
Queer	0.4
Prefer not to say	4.7
Prefer to self-describe	0.7
Total	99.1
Did not declare	0.9
Total Sample	100.0

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Coaches are more likely older than wider society... and people identifying as white are still the majority.

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Cultural background and ethnicity

As shown in Table 3, people identifying as white are still the majority at 79%, revealing that much more work needs to be done for an ethnically inclusive community. This compares with 81.2% identifying as white in the previous global study (Passmore, 2021).

Table 3: Cultural background and ethnicity

Identity	Per cent
First nation/Native people	1.3
Asian	6.1
Black	2.5
Hispanic or Latinx	1.6
Middle Eastern or North African	1.8
White	78.8
Prefer not to say	3.2
Prefer to self-describe	4.0
Total	99.3
Did not declare	0.7
Total sample	100.0

Professional body membership

While the research was supported by the EMCC, participation in the research was spread widely across the three main global bodies – the EMCC, the International Coaching Federation (ICF) and the Association for Coaching (AC). Participation also came from other professional bodies, such as Coaches and Mentors of South Africa (COMENSA), while national psychologist bodies such as the British Psychological Society (BPS) were also well represented (see Table 4). The percentage of people with no membership is relatively low (16%) in comparison with what is recognised as an unregulated field, where accreditation is not required to practise.



Table 4: Professional membership

Membership	Per cent
ICF	42.5
EMCC (or affiliated body)	36.2
None	15.7
AC	10.6
Another coaching federation (not listed above)	8.8
Coaching Psychologist (member of the BPS, APA or another national psychology society)	8.1
COMENSA	3.4
I prefer not to say	2.3
Counsellor (a member of a national counselling society)	1.3
WABC	0.5
IAC	0.4
APECS	0.2

Section 2: Fee rates and income

Fee rates is a topic that always generates interest and discussion, mainly because rates can vary widely between countries, sectors and individuals. One consistent finding across all the survey work undertaken at Henley Business School is that the rates coaches charge organisations and the rates charged to individual clients vary widely. The typical difference is around 35%, with individuals who fund their own coaching paying less.

This difference can be explained by the inability of individuals to afford high fees, as coaching is a comparatively expensive development activity. A second explanation can be derived from the type of individuals being sent by organisations, where coaching is usually part of wider executive development. These clients tend to have different goals and challenges.

As shown in Table 5, an average of US\$184 per hour for individually funded work and US\$293 per hour for organisational coaching is paid. The lowest fee rates, US\$153, were where coaches worked as associates. In these roles,

coaches may undertake more coaching and less business development (developing proposals, client meetings etc), while spending less time on administration (writing polices, producing invoices etc); this can sometimes be forgotten in a direct comparison of hourly coaching rates.

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Rates charged to organisations and those charged to individual clients vary widely; individuals pay about 35% less.
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However, these figures mask a wide range of conditions. Variation is a result of several factors, including country location of the client (and thus their ability to pay) as well as the characteristics of the coach, such as gender or experience.

Most coaches were self-employed (67%), with a small portion working as an associate, either for face-to-face or digital delivery (16%). The remainder were working as internal coaches within organisations.

Table 5: Fee rates range

Type of work	Fees per hour (US\$)
Self-employed coach with own organisational clients	293
Self-employed coach with individual clients	184
Associate for a coaching company	153



Section 3: Group and team coaching, and coaching supervision

Group and team coaching

Team coaching has become a popular intervention, with the recognition of team coaching through accreditation awards by the ICF, EMCC and the AC, and the launch of a Team Coaching programme at Henley. As shown in Table 6, many coaches have progressed to working with teams and groups alongside their one-to-one work. This may reflect the fact that organisations are requesting team or group coaching as a low-cost solution.

Table 6: Do you deliver group coaching?

	Per cent
No	57.7
Yes	42.3

Table 7: Do you deliver team coaching?

	Per cent
No	42.5
Yes	57.3
Prefer not to say	0.2

We further asked coaches about fee rates for team coaching (average: US\$355 per hour) and group coaching (average: US\$276 per hour). However, the average masks a wider variation, with some coaches charging US\$5,000 and others US\$50 per hour.

Coaching supervision

The recognition of supervision as part of continuing professional development has increased the interest in supervision training, with Henley and other providers adding the programme to their suite of courses. Asking our sample, a total 79% of coaches indicated they received supervision and paid US\$144. In addition, around one third of the coaches offer supervision themselves (see Table 8), at an average rate of US\$155. The close match between what coaches pay and charge for supervision confirms that the figures are broadly the market rates for supervision. Further, 30.6% of respondents reported delivering supervision, with 94% of these individuals reporting they delivered supervision online. This shift to online for supervision may also reduce regional variation in supervision fees.



Table 8: Do you deliver coaching supervision?

	Per cent
No	68.8
Yes	30.6
Prefer not to say	0.5

Fee rates for supervision ranged widely, with some individual supervisors charging up to US\$1,000 per hour, and some reporting that they provide supervision at pro bono rates, reflecting their supervision trainee status.

The average number of coaching supervision hours per year was 12, although this varied widely from 1 to over 20 hours.



Section 4: Digital and AI coaching

Digital coaching has continued to grow in popularity since the COVID-19 pandemic (Diller et al, 2023).

We asked coaches what modes of delivery they had used during the past year. This is summarised in Table 9; video call platforms were most common, while around 15% of coaches were using coaching platforms, 11% still used the phone, and 47% used face-to-face coaching at some point during the past year.

Table 9: Coaching modes

	Per cent
Video call (such as Zoom, Teams, Google Meet)	91.5
Face to face	47.6
Coaching platform (such as BetterUp, EZRA, CoachHub, Sounding Board)	15.1
Phone	11.4
Instant messaging (WhatsApp, Messenger)	8.8
Email	7.9
Coaching software (such as coaching.com, Delenta)	2.3
Other	2.0
Virtual reality (such as MeetVR)	0.7

Digital communication tools

When it comes to digital communication tools, Zoom came out as the preferred tool. The spread of tools by use is summarised in Table 10.

Table 10: Digital communications tool

	Per cent
Zoom	65.8
Microsoft Teams	24.7
Hangout	7.5
Skype	0.5
Facetime	0.5
Other	1.0

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Generative AI provides opportunities to overcome the weaknesses of script-based offerings, creating bots with the potential to be socially responsive, empathetic and inclusive.
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AI coaching

In recent years, the first coaching-related artificial intelligence (AI) interventions have appeared on the market. Until recently, these offers have mainly been script based and have lacked methods for sophisticated client conversations. Generative AI, however, provides opportunities to overcome these weaknesses, creating bots with the potential to be socially responsive, empathetic and inclusive/unbiased.

In the present survey, we explored coach attitudes towards the emergence of generative AI. Most (57%) felt coach bots (AI applications that replace the human coach) did not deliver coaching, while 32% were unsure, and 18% expressed the view that, actually, coach bots *did* deliver coaching (see Table 11).

In terms of future development, we asked how generative AI may impact on the development of coach bots over the next five years. The majority of coaches (46.1%) expressed the view that AI would be used to augment coaching practice, with 37% seeing it as an existential threat to some or all of their work (see Tables 11 and 12).

Table 11: Do AI coach bots deliver coaching?

	Per cent
Yes	18.0
I don't believe the conversations delivered by AI Chatbot is coaching	57.7
I don't know	23.6
I prefer not to say	0.7

Table 12: How will generative AI influence future coaching development?

	Per cent
AI will not deliver coaching	3.1
AI will only be used to offer AI coaching to those that can't afford human coaches	14.2
AI will be used by some coaches to augment their practice	46.1
AI will replace some (20–50% of) human coaches	32.8
AI will replace most (more than 50% of) human coaches	3.8

Section 5: Future trends

The future, by its very nature, is impossible to predict. However, research such as this can offer a glimpse at the trends and topics that are starting to emerge. One element that helps with this is considering the future learning intentions of coaches. What topics do coaches want to explore in more depth in 2024?

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There is a need to equip coaches with the understanding and skills to work with digital tools, from AI to digital whiteboards.
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As shown in Table 13, models, approaches and skills remain on top of the list for coaches. AI and systemic issues have risen to the top – just under 50% of coaches are interested to learn more about these topics in 2024. One in three, meanwhile, are interested in developing their skills in digital tools.

These results have implications for coaching education and suggest a need for providers to amend and adapt coaching programmes to better respond to the new environments that coaches are working in. There is also a need to equip them with the understanding and skills to work with digital tools, from AI to digital whiteboards.

Table 13: Future learning needs

Topics	Per cent
Understanding new coaching models and approaches	58.2
Understanding new coaching skills	52.8
Understanding AI	44.3
Understanding systemic issues	41.4
Understanding neurodiversity	39.3
Understanding new digital coaching tools	30.5
Understanding DEI issues	24.7
Using psychometric tools	17.8
Applying climate and sustainability	15.1





Conclusions

This Executive Report provides a brief snapshot of the changing nature of coaching during a pivotal period in the development of the industry. Coaching is transitioning from what has been largely a cottage industry dominated by small-scale sole traders delivering face-to-face, human-to-human coaching, towards a sector in which digital delivery and AI coaches will play a growing role.

What we see is coaching remaining an industry that is more female, older and whiter than the wider working population in most countries.

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There is a recognition of AI as a competitor, potentially replacing human coaches in some or all of their work.
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In terms of new technologies, there is wide-spread use of digital tools, with Zoom being the most popular. Looking to the future, there is a recognition of AI as a competitor, potentially replacing human coaches in some or all of their work.

Finally, in terms of future trends, we see a continued focus on new models, skills and an interest in understanding AI. This curiosity both to harness and leverage technology, while also develop new skills, approaches and tools, can ensure human coaches continue to differentiate themselves from technological alternatives, while harnessing its power to supplement their development and coaching.

Henley Centre for Coaching

The Henley Centre for Coaching is a global leader in coaching research and coach training. We are the only triple-accredited coaching provider in the world offering both postgraduate university qualifications in coaching and accreditation from the Association for Coaching (AC), the International Coach Federation (ICF) and the European Mentoring and Coaching Council (EMCC).

The Centre provides formal accredited coach training through our *Professional Certificate in Coaching* and *MSc in Coaching and Behavioural Change*, and accredited supervision training through our *Professional Certificate in Supervision*. These programmes are delivered in the UK at our Greenlands campus, and at venues across the world.

The Centre provides continuous professional development for coaching professionals through masterclasses, webinars, conferences, and via

online access to journals, ebooks and coaching research. These are all delivered through our online learning platform, meaning coaches can connect from anywhere in the world to engage in professional development.

The Henley coaching team consists of leading practitioners and academics who have shaped the coaching profession since the late 1990s. They have written many of the most popular coaching books and they continue to publish in leading management journals and to contribute at conferences worldwide. Their writing, thinking and research informs our teaching and ensures our programmes are at the cutting edge of coaching practice.

The Centre offers annual membership to all professional coaches, providing a virtual-learning environment where the members shape research and practice in coaching. Check out our website for details on how we can help you and your business come to life.

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978-1-912473-33-5
24.RES.027

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