International Journal of Evidence Based Coaching and Mentoring
2025, Vol. 23(2), pp.128-144. DOI: 10.24384/xtys-jh57

Academic Paper

The developing landscape of coaching in the 2020s: Exploring coach attitudes towards digital, AI, team coaching, CPD, supervision, risk taking and fee rates

Jonathan Passmore (Henley Business School)
Anastasiya Saraeva (John Madejski Centre for Reputation, Henley Business School)
Kevin Money (John Madejski Centre for Reputation, Henley Business School)
Sandra J. Diller (Seeburg Castle University)
Alison Mitchell (University of Lincoln)

Abstract

The coaching industry continues to develop, driven by emerging coaching practices and advancements in technology. This study conducted in partnership with EMCC Global used a survey method to explore coaches' experiences across different areas of coaching practice including team coaching, group coaching, AI and digital coaching. The survey also examined rates and variations in these rates. The results reveal that coaches are increasingly embracing different and digital coaching practices, but remain reserved about AI. Secondly it reveals the disparity in fee rates, which vary between different coaching services, who funders the service and geographical location.

Keywords

Coaching, team coaching and supervision fees, team and group coaching, digital coaching, AI coaching, coaching ethics

Article history

Accepted for publication: 01 July 2025
Published online: 01 August 2025

Published by Oxford Brookes University

Introduction

The coaching industry has continued to grow following the impact of Covid-19, with growth in both the number of coaches, as well as the size of the coaching market. It has been estimated there are now over 100,000 professional coaches worldwide (ICF 2023). As in many aspects of the world of work the Covid-19 pandemic has stimulated change (Gonçalves et al., 2021). Similar effects can be seen in coaching. The coaching sector is maturing; transitioning towards a digital industrial model (Travis & Woodward, 2024). In a similar vein the emergence of Generative AI is impacting on expectations about the nature of work (Ellingrud et al., 2023). Over the past three years other trends have been noticeable including the growth in team and group coaching, stimulated in part by the creation by professional bodies of team-group coaching competency frameworks (ICF 2021; EMCC, 2021) a greater focus on ethical practice, possibly stimulated by a growing maturity in the profession and changing fee rates , during an period of high inflationary costs These themes emerged as topics for research from our links with the EMCC Global, and from observation of the wider sector trends highlighted above. Our aim is to explore coach attitudes around these topics to inform professional bodies, training providers and researchers.

Literature review

In the following section we will examine the literature of group and team coaching, new technologies, coaching CPD, ethics and risk taking and fee income.

Group and Team Coaching

Group and team coaching has been a recognised coaching practice since the early 2000s. The practice grew out of a number of fields including group development (Tuckman, 1965), group process (Lewin, 1948), process facilitation (Schein, 1969), systems thinking (Argyris, 1990; Senge, Kleiner, Roberts, Ross & Smith, 1994), and developmental coaching (Kozlowski, Gully, Salas, & Cannon-Bowers, 1996). Its popularity developed with the work of Hackman and Wageman, (2005) but remained marginal compared with one to one coaching research and writing. Discussions on team coaching have too often focused on tools, techniques and case studies. A literature review by Peters and Carr (2013) identified eight case studies (Carr & Peters, 2012; Haug, 2011; Woodhead, 2011; Anderson, Anderson, & Mayo, 2008; Blattner & Bacigalupo, 2007; Clutterbuck, 2007; Kegan & Lahey, 2009; Mulec & Roth, 2005) and three publications describing team coaching models (Clutterbuck, 2007; Hackman & Wageman, 2005; Hawkins, 2011), but few critical evaluations. A more recent literature review (Passmore, Tee and Gold, 2024) found a similar focus on case study papers with no randomised controlled trial (RCT) studies, compared with more than 30 published for one to one coaching (De Haan & Nilsson, 2023). Despite these limitations in team coaching research the publication of professional coach competencies for team coaching (ICF, 2021; EMCC, 2021) and the growth of accredited team and group coach training has led to a growth in team coaching practice. We wanted to explore this change as one aspect of the survey, to better understand how far group and team coaching has spread, whether coaches have acquired additional team coaching qualifications and how fee rates compare with other coaching practices.

New Technologies in Coaching

The second theme which was identified through our discussions with EMCC Global was the continued application of technology within coaching. This has taken two forms. The first is the continued growth in the use of digital communication tools to facilitate the delivery of coaching, which saw a significant growth during the Covid era (ICF, 2023). Despite its growth in usage, the literature on digital coaching is sparse. In the digital coaching space, the focus of the literature has largely been towards conceptual issues, such as the distinctive nature of digital (for example Kantanori, 2020), explored the potential impact on the working alliance (Cook & Doyle, 2002) or the implications of the technological revolution for coach training (Passmore & Woodward, 2023). To date there has been only one example of an RCT study which used digital (audio and visual) delivery. This study compared the outcomes of digital, face to face and blended approaches (Michalik & Schermuly, 2023). The study found no difference between face to face and digital modes of delivery, but did identify differences when clients were required to navigate between different modes. Given the growth in digital coaching more research is needed to better understand this phenomena.

The second aspect is the growth in generative AI. Interest in AI has grown significantly since the launch of OpenAI's Chat-GPT in November 2022. While some have questioned whether AI coaching is actually coaching (Bachkirova & Kemp, 2024), others have championed it as a tool which can match human coach performance in client goal attainment (Terblanche, et al., 2022). A third group has adopted a positive but more cautious approach, recognising its potential while also highlighting possible risk (Rauen, 2018). Research on AI remains behind practice. A systematic literature review (Plotkina & Sri Ramalu, 2024) identified 23 coaching studies published to date. Themes includes AI bot performance (for example Terblanche et al., 2022; Passmore & Tee, 2023; Mitchell et al; 2022), with a strong bias in studies towards health coaching (Chew, 2022). A number of studies explored issues connected to the working alliance (e.g. Grabmann et al., 2019; Mai, 2021) and factors affecting client engagement (e.g. Terblanche & Kidd, 2022). In the wider literature discussion has centred around how these technologies will radically change the nature of work. Within coaching little has been done to explore coach perspectives on this theme. Given the research to date we wanted first to explore coach attitudes to AI and how were these developing in response to attitudes of commentators, and secondly, how coaches are responding and how it has affected coach practice in their day to day sessions?

Continuous professional development

The term continuous professional development has been defined as “coach's ongoing learning and development” (Jepson, 2013, p129), in this respect it refers to training which follows the completion of a coach qualification/accreditation. There are no published systematic literature reviews of CPD in coaching and few papers. A study by Jepson (2013) explored development needs across new and experienced coaches. The primary focus of the study was on the engagement with supervision which they found coaches believed was important but was not universally actively practiced. with more than 25% of respondents not engaging in supervision, mainly on cost grounds. With respect to CPD, less experienced coaches expressed interest in business management, business growth and tools and techniques, while more experienced coaches expressed diverse needs. A more recent study (Passmore, 2021) found that levels of CPD participation by professional coaches remains comparatively low, with a significant number of coaches not participating in any CPD activities post-qualification (Passmore, 2021). In this study we wanted to better understand the current learning needs to inform professional body programmes, such as what scale of interest was there for emerging themes such as climate change coaching (DiGirolamo, 2023) or AI coaching (Plotkina & Sri Ramalu, 2024), compared with traditional topics, such as tools, techniques and models identified by both Jepson and Passmore in their respective studies.

Ethics and risk

The issue of ethics has developed over the past few years as a legitimate topic for writing and research, and is reflected in recent coaching publications (Smith et al, 2023; Iordanou, Hawley & Iordanou, 2016), as well as the emergence of a new coaching journal, ‘Journal of Coaching Ethics’, and a new professional network, the ‘Coaching Ethics Forum’. However, much of this work is descriptive. Researchers have focused more on explaining ways to manage ethical dilemmas, such as through ethical decision-making models, while ignoring coach attitudes, such as how gender may influence attitudes to ethical decision making and the gap between espoused beliefs and individual practice. In this research we sought to include these as themes for exploration.

Fee income

Coaches remain fascinated by fee rates, most often from a point of equity. A small number of studies have over the past decade published fee rates (such as ICF, 2023). ICF data from 2023 reported an average global hourly rate of US$ 244, with a North American rate of US $272, and US$ 277 for Western Europe. Rates continue to change and develop and reflect the specific sample. These studies have focused on individual rates but not on how rates vary across the different services coaches provide, such as growth areas of group and team coaching, or coaching supervision.

Method

Design and Procedure

An online survey was chosen to gather data from the target participants using the Qualtrics platform. The research questions were designed in collaboration with the EMCC Global Research Committee and the final survey was approved by a University Ethics Committee. The questionnaire was piloted and took, on average, 30 minutes to complete. The survey included the following topics: coach biographical data such as gender, race, location, professional body membership, sexual orientation, fee rates, continuous professional development interests, engagement with digital coaching and AI, emotional responses to AI and coaching reputation. In each case, closed questions were used, with participants offered 6-8 options to select through a drop-down menu (see Box 1).

Box 1: Sample questions

Which modality do you mainly use for coaching delivery in 2023?
What tools do you regularly use online for one to one coaching?
Do you receive coaching supervision?
Do AI coachbots deliver coaching?

Target Participants

Target participants were 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. A target of 500 participants was set to provide insights across the range of questions.

Recruitment

Coaches were recruited using a snowball method. A survey link was created and shared by EMCC Global to its members. In addition, the link was shared with coaching providers, to their coach communities and through coaching and coach supervision networks.

Actual Participants

A total of 556 responses were received across 52 countries, over the four-week period the survey was available in 2023. Of these coaches, 98% provided biographical data.

Hypotheses

In addition to the descriptive data being collected we sought to test a small number of hypotheses driven from insights from previous surveys. Two related to data on ethics and two tested hypotheses on race and gender.

H1: Male coaches’ motivation is focused more on tangible outcomes, while female coaches’ motivations lean more towards intangible benefits.

H2 Male coaches are more likely to take risks in their coaching practice than female coaches.

H3: BIPOC coaches, based in the UK, charge lower fee rates than white coaches for personal coaching.

H4: Female coaches, based in the UK, charge lower fee rates than male coaches for personal coaching.

Data Analysis

The data was analysed using SPSS 27 to generate both descriptive statistics, such as gender identity, ethnicity and rates of pay. In addition, we used a number of analytical statistics to explore questions about ethics and risk taking, based on the following hypotheses:

Data Disclosure

Data from this study has also been included in other papers exploring specific aspects of the research study in more depth such as coach response to AI (Diller, Stenzel, & Passmore, 2024).

Results

1. Demographics

Participants were diverse with approximately 70% identifying as female and 29% male; with just under 1% of individuals identifying as a third gender. In terms of age, the single largest group was between 50 and 64 years old, representing 56.8%, with 30.35% between 30-49, 12.9% over 65 and less than 0.5 being aged 18-29. In terms of sexual orientation, 88% identified as straight, with 4% gay or lesbian and 2% as bisexual (6% did not state a sexual orientation). Regarding ethnicity, the majority of participants identified as White, at 79%, 2.5% identifying as Black and 6.1% Asian. This data reflects previous studies, confirming that coaches are more likely to be older and female than the general population, but that Black coaches are under-represented.

Table 1: 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
Total	99.3
Did not declare	0.7
Total sample	100

In terms of professional membership participation was diverse across the main professional bodies (Table 2) with ICF and EMCC members dominating responses.

Table 2: Professional membership

Membership	Per cent
None	15.70
APECS	0.20
Association for Coaching	10.60
EMCC (or affiliated body)	36.20
ICF	42.50
WABC	0.50
COMENSA	3.40
IAC	0.40
APAC	0.00
Coaching Psychologist (member of the BPS, APA or another national psychology society)	8.10
Counsellor (a member of a national counselling society)	1.30
Another coaching federation (not listed above)	8.80
I prefer not to say	2.30

2. Group and Team Coaching

Table 3 reveals data on the proportion of coaches who are now engaging in team and group coaching. The survey showed 57% of coaches offer team coaching, and 42% offer group coaching. The growth in team and group coaching reflects wider trends towards a formal recognition of these types of coaching, following the development of team coach competencies. and a desire by coaches to increase their incomes (see fee rates in Table 9).

Table 3: Do you deliver group or team coaching

	Group Coaching (%)	Team Coaching (%)
No	57.7	42.5
Yes	42.3	57.3
Prefer not to say	0	0.20

3. New Technologies in Coaching

We asked coaches what modes of delivery they had used during the past year. Video call platforms was the most widely used technology, with 91.5% using video calls, while around 15% of coaches were using coaching platforms, 11% used the phone, and 47.6% used face-to-face coaching at some point during the past year (Table 4).

Table 4: Coaching modes

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

When it came to digital communication tools, Zoom came out as the preferred tool, with Microsoft Teams as the second option. The full spread of tools by use is summarised in Table 5.

Table 5: Digital communications tool

Tool	Per cent
Zoom	65.8
Microsoft Teams	24.7
Google Meet / Hangout	7.5
Skype	0.5
Facetime	0.5
Other	1

AI coaching

Most (57%) felt coachbots did not deliver coaching, while 32% were unsure, and 18% expressed the view that they believed coach bots did deliver coaching.

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 Table 6 & 7).

Table 6: Do AI chatbots deliver coaching? (i.e. does the AI application replace the human coach?)

	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 7: 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

4. Continuous Professional Development

We asked coaches about their interests in future development. Table 8 highlights that again coaches are most interested in 'models, approaches and skills'. However, what is interesting is the change seen in interest in 'Understanding AI' and also with a greater interest in '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. Disappointing is the low level of interest in climate change and sustainability. This may be explained by the fact that coaches either do not see this as an issue or that it's not an issue they feel coaches should be addressing in coaching.

These results provide interesting insights for those involved in coach CPD, providing evidence of changing trends among the global coach community which should be reflected in future program provision. While core skills remain central, we think providers should both respond to interest in equipping coaches to become technologically fluent, understanding and being able to leverage the power of both digital and AI, while also using digital tools from whiteboards to strengths cards.

More contentious is the view that given the low interest (or understanding) on climate change and sustainability, professional bodies and schools have an obligation to better inform and educate

International Journal of Evidence Based Coaching and Mentoring
2025, Vol. 23(2), pp.128-144. DOI: 10.24384/xtys-jh57

students on the relevance of these topics for organisations and their leaders.

Table 8: 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 diversity, equity and inclusion issues	24.7
Using psychometric tools	17.8
Applying climate and sustainability	15.1

5. Ethics - Motivation and Risk Taking

With respect to ethics we posed two hypotheses relating to motivation, ethical considerations, and risk taking in coaching practice. The results revealed interesting patterns drawn from a restricted sample of 157 UK coaches.

H1 Male coaches' motivation is focused more on tangible outcomes, while female coaches' motivations lean more towards intangible benefits.

In general, the coaches in the UK exhibited a diverse array of motivations for becoming a coach, including the desire to achieve job success, acquire new skills, and be part of a community of like-minded individuals. Notably, significant differences in motivations were found between male and female coaches. Male coaches are primarily motivated by the need to achieving and maintaining job security in their coaching roles (F (1, 155)= 6.166, p = .014; M_{female} = 3.17, M_{male} = 3.93), whereas female coaches view their coaching practice as an opportunity for acquiring knowledge and developing their coaching skills (F (1, 155)= 6.766, p = .010; M_{female} = 6.26, M_{male} = 5.79). The results thus support H3.

H2 Male coaches are more likely to take risk in their coaching practice than female coaches.

Interestingly, coaches in the UK demonstrate high levels of risk appetite towards taking risks in their coaching practice. However, it is important to acknowledge that these overall patterns vary when considering gender.

The results show a number of significant differences. For example, female coaches tend to avoid situations that may lead to unpredictable results in their coaching (F (1, 155)= 5.112, p = .024; M_{female} = 2.80, M_{male} = 2.31) and believe that it is important to their clients that they do not take much risk compared to male coaches (F (1, 155)= 7.984, p = .005; M_{female} = 3.29, M_{male} = 2.69). However, we find that male coaches appear to feel more comfortable when taking risk in their coaching practice than female coaches (F (1, 155)= 4.082, p = .045; M_{female} = 4.88, M_{male} = 5.31). The results thus support H4.

Finally, the UK coaches demonstrate a profound understanding of the ethics code and exhibit confidence and expertise in detecting ethical issues in coaching practice. However not everyone appears to be prepared to report on instances of ethical misconduct to accreditation bodies when such events arise.

6. Fee Rates

Fee rates are a topic of continual interest and discussion among coaches as rates are rarely published. Rates vary widely between countries, reflecting different national economies (for example between Switzerland and Egypt), between sectors (for example financial services and public services) between individuals (for example first time managers and c-suite leaders), between types of payee and between aspects of coaching work

One consistent finding is that the fee rates coaches charge organisations and the rates charged to individual clients also vary. The typical difference is around 35%, with individuals who fund their own coaching paying less than coaching funded by organisations (excluding digital coaching companies).

The average fee rates are summarised in Table 9 for 1-1, team and group coaching and also for supervision.

Table 9: Global Fee rates range

Type of work	Fees per hour (US$)
1-1 Coaching - Self-employed coach delivering coaching to organizational clients	293
1-1 Coaching - Self-employed coach delivering coaching to individual clients	184
1-1 Coaching – Coach working as an associate for a coaching company	153
Group Coaching	276
Team Coaching	355
1-1 Supervision delivered to individual clients	165

A further difference shown in Table 10 are the fee rates across different economies (all shown in US $). We suggest that fee rates reflect both economic prosperity (strength of an individual economy) and second maturity of the coaching market, with higher fees reflecting both stronger demand and higher regard for coaching as a service. One interesting disparity is the rate difference between UK-Germany, and US and Australia.

Table 5 also shows average income for a coach based in each of these locations, with US and Australian coaches earning higher incomes than the average coach in Germany or UK.

Table 10: National differences in fee rates

Type of coaching	Global Average (US$)	UK	US	Australia	South Africa	Germany	India
Individual client paying	184	187	242	294	106	184	159
Organisation paying	293	323	349	355	138	228	250
Range (Low to high)	0-2200	0-1085	100-1000	100-900	60-250	70-350	25-500
Average income coaches from coaching for self-employed organisational coaches	$78,865 (Based on org. ave. rate x number of hours working)	$68,605	$107,212	$106,074	$33,285	$64,569	$62,400

From our participants, a total 79% of coaches indicated they received supervision, paying on average US$144 per hour. In addition, around 31% of the coaches offer supervision themselves, of these 94% reported using online supervision, at an average hourly rate of US$155. The close match between what coaches pay and charge for supervision confirms that the figures are broadly the global rates for supervision, with the majority of respondents clustered in the range $80-160 per hour. This confirms that supervision continues to command lower rates than coaching, despite the fact that supervisors are usually more experienced coaches and have completed additional training. This raises the question why do coaches not feel willing or able to pay at or about the same rate as they charge for their own coaching services?

As part of the study we posed two further hypotheses about fee rates, which we wanted to explore in more depth, relating to the relationship between gender, race and fee rates.

H3: BIPOC coaches, based in the UK, charge lower fee rates than white coaches for personal coaching.

Based on a sample of 118 UK respondents who provided data on their racial identity and fee rates we analysed responses, controlling for age. The results showed $F(1,116) = .524$, $p = .471$. M_{white} = \$187.79 (SD = \$118.8); M_{BiPOC} = \$195.55 (SD = \$156.4). While the data revealed a small differential in favour of BIPOC coaches, this difference was not significant. The hypothesis was rejected.

H4: Female coaches, based in the UK, charge lower fee rates than male coaches for personal coaching.

Based on a sample of 119 UK respondents who provided data on their gender and fee rates we analysed responses, controlling for age. The results showed $F(1,117) = .736$, $p = .393$. M_{female} = \$190.87 (SD = \$127.5); M_{male} = \$168.04 (SD = \$107.08). While the data revealed a small differential in favour of female coaches, this difference was not significant. The hypothesis was rejected.

These results indicate a change from previous data collected in 2021 (race) and 2019 (gender) when average fee rates differences were reported by participants. This change may be a reflection of the smaller sample size in this study, these or the previous results may have occurred by chance or more likely greater awareness may have brought fee rates for both groups into line.

Discussion

1. Demographics

The data from this study revealed a gender division: 70% (female), 29% (male); with just under 1% of individuals identifying as a third gender. This division is broadly comparable with earlier surveys (for example Passmore et al, 2017). We can speculate on the reasons for this division, with both demand and supply side factors in play. One aspect is the relatively low barrier to entry, with flexible working arrangements, and increasingly the opportunity to work from home. These factors may suit individuals who may seek opportunities to work around care responsibilities and where employment discrimination factors, common in many economies, are less of an impediment than in other paid roles. This may also explain why the gender gap narrows in more gender equal societies, such as the Nordic region, while it is slightly stronger in Southern and Eastern Europe.

In terms of race and ethnicity the majority of participants identified as White, at 79%, and only 2.5% identifying as Black. This data suggests under-representation of Black coaches in countries including the UK, US and South Africa, compared with the national population data of these countries. What's less clear is why might this be the case. Roche & Passmore, (2021) have suggested this may be due to a feeling that the coaching profession is not welcoming, inclusive and fails to offer a place where BIPOC coaches feel as if they belong. However more research is needed to understand this under representation issue if coaching is truly to be a diverse and inclusive profession.

2. Group and Team Coaching

Group and team coaching have grown in popularity over the period 2018-2023. This period has seen the publication of team coaching competence frameworks by the ICF and EMCC, alongside the emergence of taught programmes, by Henley Business School, Ashridge and specialist providers like the Global Team Coaching Institute.

What is interesting from the data is the number of coaches who have started to offer these services. The evidence from this survey suggests 42% of coaches offering group coaching, and

57% offering team coaching. One driver may be the desire to add additional services to their 1-1 portfolio. A second may be that team coaching is more rewarding. A third factor may be demand with more organisations expressing interest in team and group coaching, either as a lower cost solution to replace 1-1, or to replace other team building – team development initiatives.

What is less clear is how many of these coaches have undertaken team or group coaching training and how many have secured accreditation from ICF or EMCC as a team coach. The number of accredited team coaches suggests that many of those providing the services have yet to complete accreditation, and in this way the team coaching in the 2020's is an echo of one to one (executive) coaching of the late 1990's and early 2000's labelled a 'wild west', where the majority of coaches did not have any form of formal training or accreditation (Sherman & Freas, 2004). This may suggest there may be a developing market for team coach training, as individuals look to differentiate themselves in what will increasingly become a crowded market, and also what might offer a possible refuge if AI coaching starts to replace human coaches in 1-1 delivery.

3. New Technologies in Coaching

(i) AI coaching

In the present study we sought to explore coach attitudes towards AI, given the debate discussed above and its potential impact on the coaching industry. The results revealed 57% of the coaches felt that coach bots do not currently deliver 'coaching', adding to the wider discussion whether a machine can deliver a human-like conversation and establish a trustful working alliance (Bachkirova & Kemp, 2024). As part of the survey we explored coach emotional responses to AI, and the development of a threat state (Diller et al., 2024). In summary we found that the coaches perceived AI in coaching even as a threat, leading to lower interest in the application of AI in coaching as well as a more negative opinion of AI in coaching. These findings support occupational identity and intergroup threat theories that professionals can experience threat states from technological change even when that threat is not immediate or in their immediate conscious awareness (Mirbabaie et al. 2021; Zhou et al. 2022). Such threat states stimulate a pushing away and a denial which is reflected in practitioner and academic responses. In spite of coach perceptions, the real question is how clients will respond? Will coach buyers from organisations see a value in buying? How will users respond? Will they be willing to engage? Early data from case studies suggest there is both interest from buyers (Breitfelde, 2024) and interest from users (Terblanche, 2024). More research is needed to explore buyer and user attitudes towards Generative AI coaching tools, such as what factors will inform buyer decisions? What do clients expect from an AI coachbot, and whether this is similar to or different from their expectations of a human coach.

(ii) Digital coaching

The evidence from this study highlights that most coaches who switched to digital communications during Covid-19 have continued to operate in full, or in part, with 91.5% using digital communications tools in the post pandemic era. Most popular among these are Zoom, and Microsoft Teams, both of which have been introducing new AI features during 2024. This raises questions for coach training. What new issues does working online raise? How does this effect contracting, confidentiality and encouraging divergent thinking often achieved through the use of tools such as strengths cards (Boniwell & Ryan, 2021) or constellations (Whittington, 2012). Research is needed to explore how traditional aspects of coaching work may need to be redesigned and what the means for coach training syllabuses.

However, more surprising is the number of coaches who in addition to meeting in digital environments are meeting face to face, with 47.6% continuing to do so. This may reflect client preferences to start the relationship with a face to face meeting, a belief that face to face is superior in terms of outcomes or a growth in outdoor coaching, which coaches are offering alongside their digital offering. The evidence (Michalik & Schermuly, 2023) would suggest that digital delivers similar outcomes to face to face coaching, while blended approaches lead to less positive outcomes, possibly due to the challenges clients and coaches face in ‘code switching’ between these modes of delivery. A second explanation is the growing interest in outdoor coaching (Roberts, 2022). The scale of outdoor coaching however is unclear and further research is needed to explore the scale, scope and contributions of this aspect of emerging practice.

4. Continuous Professional Development

Given the rise of digital and AI technologies we had assumed that coaches would identify these areas as skills gaps. While AI has risen in significance with 4.3% expressing interest for development in this area, other core themes such as coaching models and coaching skills remained higher learning priorities. A second surprise was the relatively low interest in diversity, equity and inclusion (DEI) and climate coaching, both issues widely discussed in the media. The results suggest coaches remain focused on core practices and skills, and are less engaged by new topics than media attention would suggest. The consequence however is that coaches may be less well informed about emerging trends and miss opportunities to enhance their practice.

5. Ethics - Motivation and Risk Taking

Ethical practice is an important area of coach training and practice. As part of the study we sought to explore gender differences to ethical decision making, specifically risk taking. We noted differences in motivations based on the coaches’ gender, with male coaches more motivated by achievement and female coaches more motivated by skills and knowledge. One way to consider this difference may be to see this as a difference in attitude with female coaches focusing more towards what they can do for their client, while male coaches are more focused towards what coaching can do for them – income and security. A second possible explanation may relate towards societal expectations in roles and the male identify as the reliable bread winner. Future research could seek to unpick these aspects to better understand gender motivations within the coaching industry and how these motivation affect behaviours towards learning and client engagements.

The second gender difference related to risk taking. Wider research has shown that men typically have a higher appetite for risk than women (Harris & Jenkins, 2023). It is thus not surprising to see this replicated in the coach population. This manifests itself in both risk avoidance among female coaches and also in lower appetite for risk taking in their practice. Such behaviours may contribute to feelings among clients of greater safety in turn making clients favour female coaches over male coaches. These attitudes towards risk, if mirrored in female clients, may also explain why women are more likely to choose someone similar, thus reducing the risk of an unsuccessful coach-client match. We wondered whether this lower propensity for risk resulted in fewer complaints being made and fewer complaints being upheld against female coaches. Further research into gender differences may help us understand how such differences influence practice.

6. Fee Rates

Fee rates are a topic of continued interest and discussion among coaches as rates are rarely published or are hidden within averages that mask different forms of coaching, such as one to one or team coaching. We divided coaching into its different forms – one to one, team and group, and also split out supervision. For one to one we made further divisions between personally and organisationally funded work. The results reveal personally funded work fee rates are lower than organisationally funded work. These differences can be explained in a variety of ways. One factor is likely to be the ability of individuals to pay. A second factor may arise from the type of individuals accessing coaching. In the case of organisation funded coaching, coaching is most frequently targeted towards senior managers. While in personally funded coaching, rates are more likely to be influenced by local comparators, such as the rates for local counselling services and with a wide diversity of topics being explored, from health and wellbeing to careers and personal development.

The lowest fee rates, US$153, were where coaches worked as associates. In these roles, the coaches' roles are most restricted to coaching delivery with little or no business development (developing proposals, client meetings etc), or project administration (writing policies, producing invoices etc). While the lower rates of associate work have been criticised, these hidden costs of securing work and project administration, which are typically not chargeable, are often forgotten. If these costs represent 65% of the delivery time, this makes the hourly coaching rates, more comparable.

It is worth benchmarking the details available from this study with the ICF's 2023 Global study which noted an averaged figure US $244, with regional variation of $277 (North America), $272 (EU) to $114 in Latin America (ICF, 2023).

These 1-1 figures also hid a wide range, which vary by the country (location) of the client (and thus their ability to pay), but also the characteristics of the coach, such as gender or experience. Lower rates in one region may have been seen in the past as a disadvantage to coaches living in these regions, but the emergence of digital communications means that coaches in lower cost regions, can (assuming they hold the appropriate language skills and cultural knowledge) can seek work in higher cost regions and charge higher fees reflecting the ability to pay of clients in the region where the service is delivered.

In exploring team coaching rates, which averaged in 2023 US $355, this compared with US $398 in 2021. The reduction may reflect the growth in the number of coaches offering team coaching, many of whom may be relatively new entrants to the market.

While the number of coaches continues to grow, the ICF (2023) noted a 9% increase in average one to one coaching fees. This compares with more than a 2021% increase in inflation over this period (Macrotrends, 2024). This represents a real term decline of around 2% per annum over the 5-year period. As the total number of coaches continues to grow, alongside the emergence of AI coachbots, we predict average 1-1 fee rates in real terms will continue to decline at or above 2% per annum over the coming decade.

Coaching Supervision

The recognition of supervision as part of continuing professional development by ICF has increased the interest in supervision training. Participants from this survey, a total 79% of coaches indicated they received supervision and paid US$144 per hour. Of these 41% were accessing one to one supervision, 34.5% were using group supervision and 24.5% using peer supervision, with coaches reporting engaging in on average 12 hours of supervision per year.

In terms of supply the average rate charged by respondents of supervision was slightly higher at US$155. The close match between what coaches pay and charge for supervision confirms that the figures are broadly the global market rates for supervision is in the range US $ 145-155.

What was most surprising was the comparatively high proportion of coaches who deliver supervision: 30.6% respondents reported delivering one to one 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.

The trend for supervision use continues to grow, but we note that supervision fees remained below coaching fees for 1-1, group and team coaching. This suggests that coaches are not yet prepared to pay the rates to their supervisors which they are prepared to charge their personal clients, who are also self-funding their development.

The emergence of AI tools such as OVIDA, and potentially AI supervision tools is likely to impact the supervision market and may see some coaches switching to AI supervision, with an associated impact on fees.

Future research

Surveys provide an excellent platform for identifying a wide range of new research questions and thus informing the research agenda for the coming period. Among issues to emerge are the rise of AI coachbots, and both client and buyer attitudes towards their integration into organisations. In terms of what appears to be a permanent shift to digital, this raises questions about the need to redesign coach education to reflect the new reality of 90%+ of work online. Thirdly, we note the continuation of face to face coaching and wonder what proportion of this is desk based and what scale is reflected in the emerging trend of outdoor coaching. Fourthly, research into gender differences in coach attitudes to their role is worthy of further investigation. Do male coaches, for example, more typically seek income and influence, while female coaches are more driven by relationship and service? Fifth, our research highlighted gender differences in risk taking in theoretical cases, but we wonder how this plays out in practice in terms of the number and severity of client complaints. A sixth area to continue to monitor is fee rates, as these reflect the market's perception of value derived from coaching and the balance between supply and demand.

Limitations of research

This is a survey and carries with it limitations that may impact the validity and reliability of findings. One major limitation is response bias, with individuals providing more desirable answers. This was mitigated by anonymised data. Secondly, sampling bias may have resulted from the use of the EMCC as the primary participant group. Attempts were made to limit this by adding a snowballing method to encourage members from other coach networks to participate. Thirdly, surveys rely on self-reported data, which is prone to inaccuracies due to misinterpretation of questions. The team sought to minimise this through piloting the survey. Lastly, by using a limited number of fixed-responses, the survey may in some areas fail to capture nuanced responses that the use of open-ended questions could have achieved.

Conclusions

Coaching remains a relatively immature sector where change is fast paced, in part driven by changes as the industry moves from small local providers to global providers and as a result of technological change. This paper provides a unique perspective in terms of changing attitudes towards AI and digital, as well as providing insights into continuous professional development, fee rates and income levels.

References

Argyris, C. (1990). *Overcoming organizational defenses: Facilitating organizational learning*. Boston, MA: Allyn and Bacon.

Anderson, M. C., Anderson, D. L., & Mayo, W. D. (2008). Team coaching helps a leadership team drive cultural change at caterpillar. *Global Business and Organizational Excellence*, 27(4), 4050. DOI: 10.1002/joe.20212.

Bachkirova, T. & Kemp, R. (2024) AI Coaching: Democratising coaching services or offering an ersatz. *Coaching: An International Journal of Theory, Research and Practice*. DOI: 10.1080/17521882.2024.2368598.

Blattner, J., & Bacigalupo, A. (2007). Using emotional intelligence to develop executive leadership and team and organisational development. *Consulting Psychology Journal: Practice and Research*, 59(3), 209219. DOI: 10.1037/1065-9293.59.3.209.

Boniwell, I. & Ryan, L. (2021), Tangible Tools in positive psychology coaching, pp437-460. In W-A Smith, I. Boniwell & S. Green (eds.) *Positive Psychology coaching in the workplace*. Abingdon: Routledge

Breitfelde, M. (2024). Interview with Matthew Breitfelde, Apollo Capital, (2024). *Digital & AI Summit*, 7 June 2024, New York University, New York, US.

Carr, C. & Peters, J. (2012). *The experience of team coaching: A dual case study* (Unpublished doctoral dissertation). Middlesex University, UK.

Chew, H.S.J. (2022), “The use of artificial intelligence-based conversational agents (chatbots) for weight loss: scoping review and practical recommendations”, *JMIR Medical Informatics*, 10(4). DOI: 10.2196/32578.

Clutterbuck, D. (2007). *Coaching the team at work*. London: Good News Press.

Cook, J. & Doyle, D. (2002) Working alliance in online therapy as compared with face to face therapy. *Cyberpsychology and behavior*, 5(2), 95-105.

DiGirolamo, J. (2023) Coaching in the Anthropocene. In D. Mackie (ed.). *The Handbook of Climate change leadership in organisations*. Abingdon: Routledge

Diller, S. J. & Passmore, J. (2023). Defining Digital Coaching: A qualitative Inductive approach: *Frontiers in Psychology*, 14. DOI: 10.3389/fpsyg.2023.1148243.

Diller, S. J. Stenzel, L-C. & Passmore, J. (2024). The Coach Bots Are Coming: Exploring Coaches’ Attitudes and Responses to the Threat of AI Coaching, *Human Resources Development International* 27(4) 597-621.

De Haan & Nilsson, V. (2023) What Can We Know about the Effectiveness of Coaching? A Meta-Analysis Based Only on Randomized Controlled Trials. *Academy of Management Learning and Education*, 22(4). DOI: 10.5465/amle.2022.0107.

Ellingrud, K., Sanghvi, S., Madgavkar, A., et al. (2023). *Generative AI and the future of work in America*. New York: McKinsey

EMCC (2021). *Team Coaching Standards*. Retrieved on 12 June 2024. Available at: https://www.emccglobal.org/accreditation/itca/.

Gonçalves, S. P., Santos, J. V. D., Silva, I. S., et al. (2021). COVID-19 and people management: The view of human resource managers. *Administrative Sciences*, 11(3), 69.

Graßmann, C. and Schermuly, C.C. (2021), “Coaching with artificial intelligence: concepts and capabilities”, *Human Resource Development Review*, Vol. 20 No. 1, pp. 106-126. DOI: 10.1177/ 1534484320982891.

Hackman, J. R., & Wageman, R. (2005). A theory of team coaching. *Academy of Management Review*, 30(2), 269287. DOI: 10.5465/AMR.2005.16387885.

Harris, C. & Jenkins, M. (2006). Gender differences in risk assessment: Why do women take fewer risks than men. *Judgement and Decision Making* 1(1), 48-63. DOI: 10.1017/S1930297500000346.

Haug, M. (2011). What is the relationship between coaching interventions and team effectiveness? *International Journal of Evidence Based Coaching and Mentoring*, Special issue 5, 89-101. Available at: https://radar.brookes.ac.uk/radar/items/fcecf9d9-540b-4cf9-90f3-dd500561d84b/1/.

Hawkins, P. (2011). *Leadership team coaching: Developing collective transformational leadership*. Philadelphia, PA: Kogan Page Publishers.

ICF (2021). *Team Coaching Competencies*. Retrieved on 12 June 2024. Available at: https://coachingfederation.org/app/uploads/2021/10/Team-Coaching-Competencies_10.4.21.pdf.

ICF (2023). *Global Coaching Study*. Lexington: ICF. Retrieved on 11 March 2024. Available at: https://coachingfederation.org/app/uploads/2023/04/2023ICFGlobalCoachingStudy_ExecutiveSummary.pdf.

Jepson, Z. (2016) An investigation and analysis of continuous professional development needs and coaching supervision needs of newly qualified and experienced coaches: a small scale practitioner based study. *Coaching: An International Journal of Theory, Practice and Research*, 9(2), 129-142.

Iordanou, I., Hawley, R. & Iordanou, C. (2016). *Values and ethics in coaching*. London: Sage

Kanatori, S. (2023). Digital coaching: A distinctive form of coaching. In R. Wegener, S. Ackermann, J. Amstutz, S. Deplazes, H. Kunzli & A. Ryter (eds.) *Coaching im digitalin wandel*. Gottingen: Vandenhoeck.

Kegan, R., & Lahey, L. L. (2009). *Immunity to change*. Boston, MA: Harvard Business School.

Kozlowski, S. W. J., Gully, S. M., Salas, E., & Cannon-Bowers, J. A. (1996). Team leadership and development: Theory, principles and guidelines for training leaders and teams. In M. Beyerlein, D. Johnson, and S. Beyerlein (Eds.), *Advances in interdisciplinary studies of work teams: Team leadership* (pp. 251-289). Greenwich, CT: JAI Press.

Lewin, K. (1948). *Resolving social conflicts: Selected papers on group dynamics*. Oxford, England: Harper.

Macrotrends (2024). World Inflation rate. Retrieved on 24th October 2024. Available at: https://www.macrotrends.net/global-metrics/countries/WLD/world/inflation-rate-cpi.

Mai, V., Wolff, A., Richert, A. & Preusser, I. (2021), "Accompanying reflection processes by an AI- based StudiCoachBot: a study on rapport building in human-machine coaching using self- disclosure", *HCI International 2021-Late Breaking Papers: Cognition, Inclusion, Learning, and Culture: 23rd HCI International Conference, HCII 2021*, Virtual Event, July 24-29, 2021, Vol. 23, pp. 439-457, Proceedings. DOI: 10.1007/978-3-030-90328-2_29.

Michalik, N. & Schermuly, C. (2023). Online, offline, or both? The importance of coaching format for side effects in business coaching, *Journal of Managerial Psychology*, 39(6). DOI: 10.1108/JMP-01-2023-0068.

Mirbabaie, M., Brünker, F., Möllmann, R., et al. (2021). "The Rise of Artificial Intelligence – Understanding the Ai Identity Threat at the Workplace." *Electronic Markets* 32 (1): 73–99. DOI: 10.1007/s12525-021-00496-x.

Mitchell, E., Elhadad, N. & Mamykina, L. (2022), "Examining AI methods for micro-coaching dialogs", *Conference on Human Factors in Computing Systems - Proceedings*, Vol. 1, pp. 1-24. DOI: 10.1145/3491102.3501886.

Mulec, K., & Roth, J. (2005). Action, reflection, and learning and coaching in order to enhance the performance of drug development project management teams. *R and D Management*, 35(5), 483491. DOI: 10.1111/j.1467-9310.2005.00405.x.

Passmore, J. (2021). *Future Trends in Coaching: Executive Report 2021*. Henley on Thames: Henley Business School, UK.

Passmore, J., Brown, H., Csigas, Z. et al., (2017). *The State of Play in Coaching & Mentoring: Executive Report*. Henley on Thames: Henley Business School-EMCC. DOI: 10.13140/RG.2.2.25602.12486.

Passmore, J. & Tee, D. (2023). The Library of Babel: Assessing the powers of Artificial Intelligence in coaching conversations and knowledge synthesis. *Journal of Work Applied Management*. DOI: 10.1108/JWAM-06-2023-0057.

Passmore, J. & Tee, D. & Gold, R. (2024). Team Coaching using LSP and Team facilitation, *Journal of Work: Applied Management*. DOI: 10.1108/JWAM-12-2023-0137.

Passmore, J. & Woodward, W. (2023) Coaching education: Wake up to the new digital coaching and AI revolution! *International Coaching Psychology Review*, 18(1), 58-72. DOI: 10.53841/bpsicpr.2023.18.1.58.

Peters, J., & Carr, C. (2013). Team effectiveness and team coaching literature review. *Coaching: An International Journal of Theory, Research and Practice*, 6(2), 116-136.

Plotkina, L. & Sri Ramalu, R, (2024). Unearthing AI coaching chatbots capabilities for professional coaching: a systematic literature review. *Journal of Management Development*.

Rauen, C. (2018). *Quo vadis, Business Coaching?* Presentation at the DBVC Coaching Kongress in Berlin/Potsdam, Germany.

Roche, C. & Passmore, J. (2021). *Racial Justice, Equity & Belonging in Coaching*. Henley on Thames: Henley Business School.

Roberts, L. (2022). *Outdoor Coaching*. Practical Inspiration Publishing

Schein, E. H. (1969). *Process consultation: Its role in organization development*. Reading, MA: Addison-Wesley.

Senge, P. M., Kleiner, A., Roberts, C., et al. (1994). *The fifth discipline fieldbook: Strategies and tools for building a learning organization*. New York, NY: Currency Doubleday.

Sherman, S. & Freas, A. (2004). The wild west of executive coaching. *Harvard Business Review*, November 82-90. Retrieved on 3 May 2024. Available at: https://hbr.org/2004/11/the-wild-west-of-executive-coaching.

Smith, W-A., Passmore, J., Lai, et al. (2023). *The Ethical Coaches' Handbook*. Abingdon: Routledge.

Terblanche, N. and Kidd, M. (2022), "Adoption factors and moderating effects of age and gender that influence the intention to use a non-directive reflective coaching chatbot", *Sage Open*, 2(2). DOI: 10.1177/21582440221096136.

Terblanche, N., Molyn, J., de Haan, & Nilsson, V. O (2022). Comparing artificial intelligence and human coaching goal attainment efficacy. *Plos One*. DOI: 10.1371/journal.pone.0270255.

Terblanche, N. (2024) *A review of AI coaching AI Coaching Conference*, 12 September 2024, Zurich, Switzerland

Travis, A. & Woodward, W. (2024). *The digital coaching revolution*. London: Kogan Page

Tuckman, B. W. (1965). Developmental sequence in small groups. *Psychological Bulletin*, 63(6), 384399. DOI: 10.1037/h0022100.

Whittington, J. (2012). *Systemic coaching and constellations: An Introduction to the principles, practices and applications*. London: Kogan Page

Woodhead, V. (2011). How does coaching help to support team working? A case study in the NHS. *International Journal of Evidence Based Coaching and Mentoring*, Special issue 5, 102-119. Available at: https://radar.brookes.ac.uk/radar/items/8bdb6a42-d030-408f-b9e2-dff8b878c83f/1/.

Zhou, Y., Shi, Y., Lu, W. & Wan, F. (2022). "Did Artificial Intelligence Invade Humans? The Study on the Mechanism of Patients' Willingness to Accept Artificial Intelligence Medical Care: From the Perspective of Intergroup Threat Theory." *Frontiers in Psychology* 13. DOI: 10.3389/fpsyg.2022.866124.

About the authors

Jonathan Passmore is professor of coaching and behavioural change at Henley Business School. he is a chartered psychologist and was the Inaugural Chair of the BPS Division of Coaching Psychology. He has published widely with over 100 peer review papers and 40 plus books. His most recent books include 'Becoming an ICF Credentialled Coach' and the Routledge series of coaching handbooks.

Anastasiya Saraeva is Associate Professor of Reputation and Responsibility at the John Madejski Centre for Reputation at Henley Business School (UK). Her areas of interest include reputation, stakeholder relationships, identification and communication. Anastasiya has authored papers in various journals, including British Journal of Management, Industrial Marketing Management, and Corporate Reputation Review.

Kevin Money is the Director of the John Madejski Centre for Reputation and Professor of Reputation and Responsible Leadership at Henley Business School. He is a chartered psychologist, former editor of the Journal of General Management and author of numerous articles in outlets such as the British Journal of Management, the Journal of Business Ethics and the Journal of Business Research.

Sandra Diller is a Professor at Seeburg Castle University (SCU), a Research Affiliate at Harvard Medical School's Institute of Coaching, and an Affiliate at LMU's Center for Leadership and People Management. She researches on personnel and leadership development and social interactions in organizations. Sandra further leads the MBA in Coaching at SCU.

Alison Mitchell is head of EMCC Global Centre of Excellence and is Director of Inclusive Development at University of Lincoln.