



Frank Bresser Consulting Report: Executive Summary

Global Coaching Survey

2008/2009

The state of coaching across the globe:

The results of the Global Coaching Survey 2008/2009

July 2009

EXECUTIVE SUMMARY

REPORT: *Executive Summary*

This paper gives an overview of the situation of coaching across the globe by presenting the key results of the Frank Bresser Consulting Global Coaching Survey 2008/2009. The project covered 162 countries and, for the first time, systematically examined the situation and development of coaching in the world overall, in each continent, region and country. The first part sets out the research purpose and design. Then, a summary of the most important results regarding the world overall and each continent (in alphabetical order) follows. The Executive Summary finishes with a closing note and information on where to get the detailed report (available from 1st of August 2009).

The Project

PURPOSE

The Global Coaching Survey 2008/2009 examined the current state and development of coaching in the world overall, in each continent, region and country. Frank Bresser Consulting conducted research in 162 countries (which account for almost 100% world population).

RESEARCH DESIGN

The research topic and the general lack of statistics on coaching (and of valid quantitative samples across the globe) supported a qualitative - rather than quantitative - approach: The research team identified qualified organisations and people, who have a good overview of coaching in their country and the resources to gather further relevant information as needed, as the main sources of data.

Participant selection and data generation

Identifying participants:

First, we identified the existing national and international coaching associations around the world, as it is their remit to gather relevant information on their local coaching markets. The second step was to identify a leading one in each

country and invite these to respond to our questionnaire. Where we couldn't identify a coaching association in a country, we searched for a suitable, leading coaching-related association (e.g. Human Resources), coaching provider, consultancy, coaching expert or coaching-related university faculty with credibility in providing relevant information.

Questionnaire design:

The questionnaire included open and closed questions. Partly, questions were similar to each other to allow for cross-checking within the answers given by a participant. The questions generally allowed for interpretation by the participants in order to embrace maximum diversity of coaching practices and approaches, rather than putting participants in a pre-set box that might not fit. We were eager to listen and learn, not prescribe or promote a certain way of doing things.

Accordingly, we deliberately kept the questions broad and did not define terms precisely or assume a specific understanding of coaching. How questions were interpreted and answered provided insights into the understanding, practice and development of coaching in each country.

Participant responses:

It was the responsibility of each participating organisation to decide on the most appropriate approach/resources to gather the required information. This ranged from local surveys and board-meetings to market researches/analyses to the use of existing statistics. In fact, this survey actually triggered many local research initiatives on coaching across the globe.

However, it is important to highlight that in many cases responses are rough estimates. Coaching is a young discipline, and exact figures are rarely available (e.g. as most countries have no requirement to register as a coach, it is difficult to identify their number of coaches). So whilst the survey can provide a good first idea of coaching around the world, in each continent, region and country, it is far from being absolutely accurate. Where the results open up controversial discussions, this is welcome and in the spirit of the survey.

Validation and comparability:

After receiving participants' information, we reviewed this data and checked it for internal and external consistency, relevance, clarity and validity. As appropriate, we made further enquiries of participants to gather further information and clarification. This stage of dialogue and discussion was a very valuable part of the whole process producing further highly interesting insights and giving much more background information. Another final review and editing stage followed, and only then did we take the answers as accepted country information.

Only at this stage, did we work towards making sense of the data and align them for optimal consistency and comparability (inductive approach). The point is: in order to avoid comparing apples with oranges, you first need to know what kind of fruits there are and be able to recognize them.

Setting the foundation:

The Global Coaching Survey will be conducted regularly from now on and is definitely an ongoing project. The Global Coaching Survey 2008/2009 has now set the right foundation. In the next run, we will be able to build on and compare with these findings.

In this first run of the survey, there is a focus on professional one-to-one business coaching. This was deliberately chosen as it is the most visible and well-known coaching form so far in the corporate world and thus was a valid starting point. However, it is only the starting point. Next time, there will be much more coverage of other coaching forms (e.g. coaching leadership style, coaching culture, team coaching).

Additionally researched countries

It was our initial ambition to find suitable participants in every country, and we actually identified qualified participants in most countries (covering 88% of the world population). All countries with a visible coaching industry have participated. However, research was very difficult in a number of countries where coaching wasn't yet developed. Here, we were successful in a great number of cases, but not all.

With regard to these latter cases, where the following possible research activities found nothing tangible, we decided to stop and share our own findings on the basis of these activities instead:

Announcement for 2010:



THE GLOBAL BUSINESS GUIDE for the successful use of COACHING IN ORGANISATIONS

by Frank Bresser

Download available at:

www.frank-bresser-consulting.com

Including...

- The 7 leading-edge Frank Bresser Consulting frameworks for the successful implementation and improvement of coaching in business
- Case studies from all over the world



- Extensive online research on coaching in the country
- Conversations with people in the country
- Conversations with participants from neighbour countries
- Researching memberships of people/organisations from the country in international coaching associations (or related associations)
- Contacting local institutions for further information, e.g. Chambers of Commerce, international representations in countries, UNDP (United Nations Development Programme, the UN's global development network)
- Making use of other networks

We acknowledge that it remains possible that there are coaching providers and communities in these countries we haven't yet discovered. This may be especially true, where organisations/people don't have internet access, are very locally organized and/or are operating and presenting themselves in a rarely known language.

However, we have assumed that if there was a strong, growing coaching industry in the country, we would have been able to discover it in the given time. As a result we can only give a very rough estimate/impression of the lack of coaching in these countries.

It remains our aim to get participants from all countries in future runs of the survey. In fact, the survey is work in progress, and we are happy to include anyone knowledgeable about coaching in these countries in the future.

Further remarks

It is the first time that coaching associations from all over the world were identified, contacted and successfully brought together in a big project like this. The list of participating organisations and people alone is worth reading.

Remarkably, just two of all participants mentioned the financial crisis in their answers - and this only marginally. Therefore, when the answers were generated (2008 and early 2009), the financial crisis hadn't already hit the coaching market in a significant way. This makes the Global Coaching Survey 2008/2009 particularly important and valuable: It is not just the snapshot of very exceptional circumstances. It reflects and documents the state and (longer term) development of coaching right up to the point before any potential volatility in the coaching market due to the global crisis occurred.

The Results

We will first look at the situation of coaching in the world overall and then go into detail for each continent (in alphabetical order).

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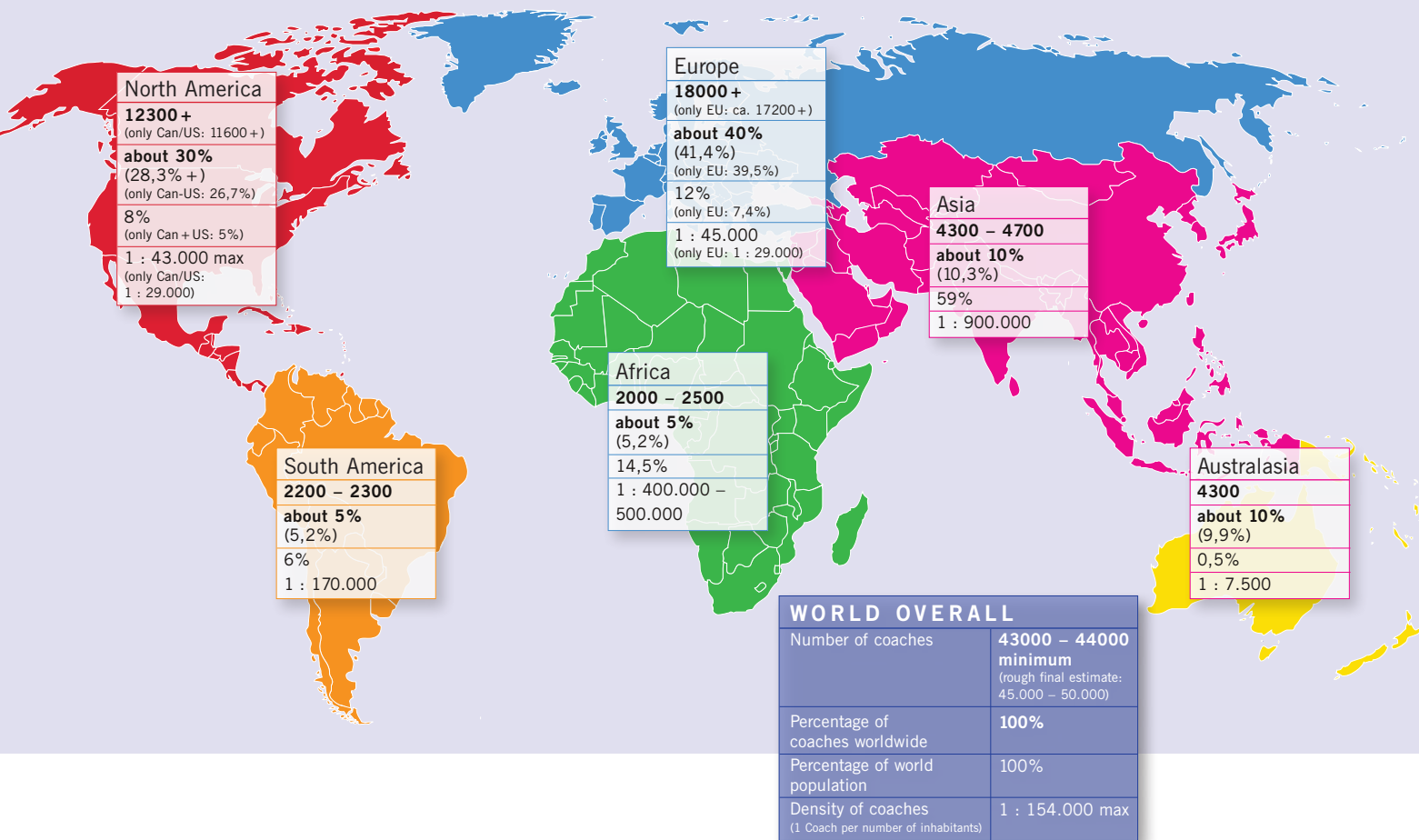


www.frank-bresser-consulting.com

Frank Bresser is the global business expert for the successful implementation and improvement of coaching.

Supported by his worldwide team of assistant consultants, he advises companies on the effective use of coaching.

His expertise is used and put in practice successfully in organisations across the globe and has set international standards in the implementation and improvement of coaching.



WORLD OVERALL

There are about 43,000-44,000 business coaches minimum operating in the world.

Coaching is definitely a global phenomenon; the top 10 countries with the highest numbers of coaches include an Asian, an African and a South American country (Japan, South Africa, Brazil). However, there remain extreme differences in the development and size of coaching markets depending on each continent and country.

Europe, North America and Australia – representing just 20% of the world population – comprise 80% of all business coaches of the world. More than two thirds of all coaches are based in the European Union, USA and Canada which represent just 13% of the world population.

Specifically: The 7 countries with the highest numbers of coaches (US, UK, Germany, Australia, Japan, Canada, South Africa) comprise only 10% of the world population, but about 73% of all coaches.

Coaching is on the rise across the globe and there are singular, highly developed and dynamic “centres” of coaching. But comprehensive area-wide coverage of coaching is far from a reality. This is true for all continents.

This can be further illustrated by the following findings:

- Coaching is already widely accepted and used as a business tool in 28 countries (of these 14 are European). However, in 114 countries (about 70% of all countries), it is not. In another 20 countries, this is undecided.
- In 33 countries, coaching is in the growth phase (7 of these in early stages of growth). In a further 50 countries coaching has entered the introduction phase (5 of these being in between pre-introduction and introduction). In the remaining 77 countries (nearly 50%), business coaching hasn't yet visibly developed. In two countries (Norway and the Netherlands), coaching has already entered the maturity phase.
- In 27 countries from all continents, business coaching is well advanced towards becoming a profession (15 from Europe). However, in 125 countries, i.e. in nearly four fifths of all countries, it is not. In 10 countries, this is undecided.
- National and international coaching associations exist in Northern America, Europe, and Australasia. There are also some in South America, but few in Asia and even less in Africa. In nearly half of the 162 countries, there is no single member of any national or international coaching body in the country.

- The concept of coaching cultures is quite well known in 19 countries. In a further 29 countries there is slight knowledge and use of it. However, in 111 countries, the concept is hardly or not known at all.
- There is an overall balance of directive and non-directive coaching approaches in the world. The predominant coaching style is directive in 28 countries, non-directive in 24 countries. In 110 countries, this is undecided.

- The use of coach supervision is widely spread in 23 countries (around 15% of all countries).

Generally speaking, there is no dominant picture of coaching yet and diversity prevails. There is not the African, Asian, Australasian, European, North American or South American approach. But you need to look into each continent to find out more.

Frank Bresser Consulting Seminars

Reserve your place in one of the 3-day seminars with Frank Bresser:

➤ HOW TO SUCCESSFULLY USE COACHING IN BUSINESS

The 7 leading-edge Frank Bresser Consulting frameworks for the successful implementation and improvement of coaching

Target Group:

- Directors/Managers (HR, OD, L&D)/CEOs/Board members responsible for the implementation/improvement of coaching in organisations.

We explicitly welcome participants from across the globe. The seminar language is English.

Content:

- Learn how to make best use of coaching in your company.
- The 7 leading-edge Frank Bresser Consulting frameworks for the successful implementation and improvement of coaching
 - Practical illustrations through various case studies
 - Knowledge sharing and reflection space
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Venue:

- Within very easy reach by train/bus/car of Cologne/Bonn Airport (also of Düsseldorf Airport and Frankfurt Airport)



Dates for 2010:

- 21 - 23 April 2010
14 - 16 July 2010
27 - 29 October 2010
26 - 28 January 2011

Registration:

- You find the registration form and more information at:
www.frank-bresser-consulting.com/seminars.html

AFRICA

There are about 2,000-2,500 business coaches operating in Africa.

South Africa – with about 5% of the African population – has around 1600 business coaches comprising about 70% of the total. Approximately 12% of African coaches (260) are based in Egypt, Kenya and Morocco, so the other 44 African countries have the remaining 18% of business coaches on the continent.

The density of coaches in Africa is 1 coach per 400,000-500,000 inhabitants (without South Africa it would be 1 coach per 1-2.3 million inhabitants).

In Africa, coaching is still in its infancy. The following findings illustrate this further:

- Only in Morocco is coaching already widely accepted and used as a business tool. In three other countries (South Africa, Egypt, Libya,) this is undecided.
- In two countries (Morocco and South Africa) coaching is already in the growth phase, and in another 9 countries it is in the introduction phase. In the remaining 36 countries, however, business coaching hasn't yet visibly developed.
- In Morocco and South Africa, one-to-one business coaching is already well advanced towards becoming a profession. In all other 46 countries, it is not. No country is undecided.
- National coaching associations have successfully developed in Morocco and South Africa. Emerging coaching communities may also be found in Uganda and Nigeria. However, the overall situation with regard to professional coaching bodies in Africa (national or international ones) is very poor.
- The coaching culture concept is almost unknown in Africa. Only in South Africa, and here above all in the context of multinational companies rather than in local companies, is it mentioned.
- There are few local coaching initiatives in Africa yet (only in Morocco, South Africa and partly in Uganda, Nigeria and Egypt) which define and develop coaching specifically for their country or region. Coaching is more driven and determined by multinational clients and international

coaching, if it exists at all. You rarely find specifically African coaching approaches on the continent at this early stage. General issues are the need for better education of clients and the challenge to overcome existing cultural barriers.

- Geographically speaking there are huge gaps: coaching features in Northern Africa and in South Africa plus Botswana and in Kenya and Uganda in the East and Nigeria and Gabon in the West, but the rest of the continent is still undiscovered in terms of coaching.
- The use of coach supervision is widely spread in 4 countries. Remarkably, these have a rather “small” coaching industry (10-60 business coaches). In contrast, in South Africa with about 1600 coaches, supervision is not widely used.
- There is a strong directive dimension to coaching in Africa. In 6 countries a directive coaching approach prevails and a non-directive approach predominates in no single country. Also, where it is undecided, it is mainly because there is simply no coaching industry yet. In nearly all countries, it is an issue that clients expect to get advice and direction from (potential) coaches.

ASIA

There are about 4,300-4,700 business coaches operating in Asia.

Japan and South Korea – with about 4% of the Asian population – have around 2,500 business coaches comprising about 55% of all Asian coaches. Another 10% of coaches are based in the region of Singapore, Malaysia and the Philippines.

The density of coaches is 1 coach per 900,000 inhabitants in Asia (without Japan it would be 1 coach per 1.4-1.6 million inhabitants).

In general, Eastern and South-eastern Asia may be regarded as the two largest and most dynamic coaching regions. There are major coaching activities in only a few other countries (e.g. United Arab Emirates, Israel, India). Apart from these, however, coaching is still in its infancy (if at all) in Asia.

The following findings illustrate this further:

- In Japan, Malaysia, Singapore and South Korea, coaching is widely accepted and used as a business tool. In 32 countries (about 75%), it is not. In another six countries this is undecided (India, United Arab Emirates, Israel, Philippines, Lebanon, Bahrain).
- In Japan and South Korea, one-to-one business coaching is well advanced towards a profession. In 37 countries, it is not. Only in 3 countries, this is undecided. There is a tendency in Asia to see and develop coaching more as a service rather than as a profession.
- In 5 countries (Japan, Singapore, South Korea, United Arab Emirates and the Philippines) coaching is in the growth phase, in another 17 countries it is in the introduction phase. In the remaining 20 countries, however, business coaching hasn't yet visibly developed - no coaching industry could be identified.
- There is no prevailing coaching style in Asia. However, there is a slight slant towards directive coaching: 13 countries claim directive as the dominant style (in Bangladesh and Pakistan coaching is highly directive), whereas 6 countries claim non-directive coaching as the predominant style. In 23 countries, this is undecided. So there is not the Asian approach. Depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered.
- In three countries (Japan, Philippines, Malaysia), the coaching culture concept is already well known and used. In another five countries (China, India, Israel, Saudi-Arabia, United Arab Emirates) this is partially the case.
- International coaching associations are quite active in Asia and contribute to the development of coaching there. At the same time, a number of local coaching initiatives have already emerged in Asia and have started to define and develop coaching specifically for the respective region or country. National or regional coaching bodies partly exist or are starting to emerge and be formalized. Also a first international (i.e. Asia Pacific) coaching association in the region has been set up. So coaching is clearly on the rise and in the process of becoming more mature in Asia in terms of quality and infrastructure.
- However, coaching is still mainly driven and determined by multinational clients or international coaching. As a result,

you rarely find specific Asian coaching forms and approaches. So while local initiatives increasingly take place in Asia, these still remain rather limited.

AUSTRALASIA

There are about 4,300 business coaches operating in Australasia, of which around 4,000 are based in Australia and 300 in New Zealand (in Papua New Guinea, the estimate is up to 10).

Australasia is the continent with the highest density of coaches (1 coach per 7,500 inhabitants). Although it only represents 0.5 % of the world population, about 10% of all business coaches across the globe are based here.

There is a clear divide between Australia and New Zealand on the one hand, where coaching is in the growth phase, widely accepted and used as a business tool and well advanced towards becoming a profession and Papua New Guinea on the other hand, where it is still in the pre-introduction phase.

Australia has the highest density of coaches in the world (1:5,300); New Zealand has the fifth highest (1:14,300). Accreditation, codes of ethics and professional coaching bodies are highly developed in Australia in particular.

A directive and straight-forward style of coaching is generally preferred and common practice in both countries.

Supervision is not currently widespread in Australasia, however it is increasingly gaining momentum in Australia and New Zealand.

In New Zealand, the coaching culture concept is well known and widely used, in Australia this is also the case, but less strongly.

EUROPE

There are about 18,000 business coaches operating in Europe. It is therefore the continent with the highest number of coaches.

However, this is not evenly distributed; UK and Germany (nearly 20% of the European population) comprise around 70% of all business coaches on the continent. In contrast, only about 5% of all coaches are based in the area of the former communist countries (40% of the population).

The density of coaches in Europe is 1 coach per 45,000 inhabitants (without Germany and UK it would be 1:120,000). The density in the European Union is 1:29,000 (which is the same as the density of coaches in USA plus Canada).

The nature of coaching in Europe is generally characterized by a great diversity of coaching styles, practices and development degrees; probably due to the existing multiplicity of cultures and countries on the continent. Another significant element of coaching in Europe is the high degree of internationalisation and continuous convergence in the field.

Generally speaking, there is a West-East and a slight North-South divide in the development of coaching. The Anglo region, the Founder Countries of the European Community and Scandinavia, have well developed coaching industries. This is less true for the Mediterranean region, and even less the case for the former communist area. Within each of these regions, however, the practice and development of coaching may differ enormously.

Coaching may be far advanced in Europe, but there also remains a lot to be done. This is illustrated further by the following findings:

- In 14 countries (all Western/ Northern Europe), coaching is widely accepted and used as a business tool. However, in 22 countries it is not. In 5 countries this question is undecided.
- In 15 countries (mainly Western/Northern Europe), professional one-to-one coaching is far advanced towards becoming a profession. However, in 21 countries it is not. In 5 cases this is undecided.
- In 16 countries, business coaching is already in the growth phase, in another 15 countries it is in the introduction phase. In 2 countries, coaching has already entered the maturity phase. However, in 8 countries, coaching is still in the pre-introduction phase.
- Plenty of national as well as international coaching associations exist across Europe. In some countries there are even several (e.g. Germany: about 20 major ones). So the infrastructure in terms of coaching bodies is well advanced in Europe. However this is less the case in Eastern and Southern Europe.
- There is a slight slant towards non-directive coaching in Europe. While in 4 countries a directive coaching approach prevails (Greece, Ireland, Latvia, Portugal), non-directive coaching predominates in 12 countries. However, in most countries (25), this is undecided.
- The use of coach supervision is widely spread in one fourth of the European countries (10), in 17 it is not. In 14 this is undecided.
- The concept of coaching cultures is quite well known and widely used in 10 countries; in another 10 countries coaching cultures are known. In 21 countries, however, the coaching culture concept is hardly or not known at all.

NORTH AMERICA

There are at least 12,300 business coaches operating in North America.

USA and Canada comprise around 11,600 business coaches, Mexico another 600. So in all Central America and the Caribbean, there are only 100 to 150 business coaches.

USA, accommodating about 10,000 business coaches (minimum), is the country with the highest number of coaches in the world in terms of absolute coach figures. Canada is the 6th (with at least 1,600 coaches).

The density of coaches on the whole continent is 1 coach per 43,000 inhabitants. In Northern America (USA and Canada) it is 1:29,000 (which is the same as the European Union).

There is an extreme North-South divide in the development of coaching within North America. USA and Canada have highly advanced coaching industries, whereas the whole of Central America is in the pre-introduction phase, and in the Caribbean few coaches are operating. Coaching in Mexico is located somewhere in between the two poles.

The following findings illustrate this further:

- In USA, Canada, Mexico and Puerto Rico (which is a country associated with the USA) coaching is widely accepted and used as a business tool. In all the other 12 countries, it is not. No country reports undecided.
- In Canada, USA and Mexico, coaching is in the growth phase. In 10 countries (including also all Central America) it is still in the pre-introduction phase (no coaching industry could be identified). In three other countries (Puerto

Rico, Dominican Republic and partly in Jamaica) coaching has entered the introduction phase.

- In USA, Canada and Puerto Rico coaching is well advanced towards becoming a profession. In all others, it is clearly not, not even in Mexico.
- There are well-developed professional coaching associations in USA and Canada, but coaching bodies are absent in Central America and the Caribbean. Mexico is in between: coaching associations are already emerging, but these haven't yet been able to establish professional standards successfully in the market and take coaching as a profession to the next level in the country.
- The coaching culture concept is well known and used in USA. This is partly true in Canada and Puerto Rico. However, in Mexico, the concept is only slightly used. In the remaining 11 countries, it is not known (at all).
- There is no prevailing coaching style in North America, the whole range from directive to non-directive coaching can be found. Interestingly, coaching in USA and Mexico is mostly non-directive, whereas it is undecided in Canada. Depending on each country, there may be many different local characteristics and preferences in the way coaching is understood and delivered.
- A typical coaching feature in both USA and Canada is a high emphasis on the (self-directed) role of the individual. Additionally a lot of remote coaching (usually by telephone) as opposed to face-to-face coaching is taking place in the north.
- In Central America, while 1:1 coaching is indeed in its infancy, in Honduras and Costa Rica coaching is emerging as a tool of group facilitation (group coaching) in multinational organisations.
- The use of coach supervision is widely spread only in USA, not for example in Canada and Mexico.

SOUTH AMERICA

There are about 2,200-2,300 business coaches operating in South America.

Comparing this with other regions of the world, the number is quite low, in particular given the overall high development of coaching on the continent.

The density of coaches in South America is 1 coach per 170,000 inhabitants. Interestingly, while Brazil is the country with the highest number of business coaches at 1,000, due to its large population its density of coaches is lower (1:195,000) than the continent average. The highest density of coaches on the continent is in Columbia at 1 coach per 88,000 inhabitants.

South America is generally quite advanced in the development of coaching which is illustrated by the following findings:

- In Argentina, Colombia and Peru, coaching is already widely accepted and used as a business tool. In another 6 countries, this is undecided. In 3 (comparatively small) countries coaching is not much used.
- In 5 of the 12 countries - Argentina, Brazil, Colombia, Peru and Chile - coaching is in the growth phase. In another 5 it is in the introduction phase. In 2 countries, business coaching hasn't yet visibly developed.
- In Argentina, Chile and Peru, coaching is well advanced towards a profession. In 7 countries it is not. In two this is undecided.
- A characteristic of coaching in South America is the high number of countries having a national coaching association (e.g. Argentina, Brazil, Chile, Peru). This suggests that coaching bodies are actively shaping the development and understanding of coaching in a more local way. International coaching associations are also present on the continent.
- The South American coaching approach doesn't exist. Depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered. Coaching is not predominantly directive on the continent; on the contrary, there is a slight slant towards non-directive coaching.
- Despite coaching being already quite advanced in a number of countries, the number of business coaches is low when compared with developed coaching markets on other continents.
- There are sometimes cultural reservations about coaching (e.g. conservative style, authoritarian attitude, resistance,

expectation of a directive coach) that need to be overcome (e.g. in Uruguay, Ecuador, Brazil, Chile).

- Venezuela is the only country in South America where coach supervision is widely spread. This is mainly due to the fact that key providers of coach training in the country strongly promote it. Apart from this, supervision doesn't play a major role in South America.
- The coaching culture concept is well known and widely used in Argentina. This is slightly true in Brazil, Uruguay, Venezuela, Colombia and Chile, but in the remaining 6 countries, the concept is not known.

CLOSING NOTE

The Global Coaching Survey will be conducted regularly from now on, and it will be very interesting to see how coaching evolves on each continent in the future.

If you want to share your expertise/thoughts on coaching in a specific continent, region or country, please do so and send an email to: info@bresser-consulting.com

There is a lot of research on coaching in the world to be done, and this survey will hopefully serve as an invitation and starting point for others to undertake further research in the field.

DETAILED REPORT

The detailed report on the results of the Global Coaching Survey 2008/2009 (as well as special editions for each continent) is available for free as download at:

www.frank-bresser-consulting.com/globalcoachingsurvey.html

Full Report:

"The state of coaching across the globe - The results of the Global Coaching Survey 2008/2009"

(Frank Bresser Consulting Report, pdf-file, 170 pages, August 2009)

Special report editions for each continent:

- Special edition Africa (African Coaching Survey 2008/2009)
- Special edition Asia (Asian Coaching Survey 2008/2009)
- Special edition Australasia (Australasian Coaching Survey 2008/2009)
- Special edition Europe (European Coaching Survey 2008/2009)
- Special edition North America (North American Coaching Survey 2008/2009)
- Special edition South America (South American Coaching Survey 2008/2009)
- Special edition World overall and comparison of continents

All editions are available for free as download at:

www.frank-bresser-consulting.com/globalcoachingsurvey.html

ABOUT FRANK BRESSER CONSULTING

The research project was initiated and conducted by Frank Bresser Consulting.

Frank Bresser is the global business expert for the successful implementation and improvement of coaching. Supported by his worldwide team of assistant consultants, he advises companies on the effective use of coaching. His expertise is used and put in practice successfully in organisations across the globe and has set international standards in the implementation and improvement of coaching.

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