E.M.C.E. 2012
(Market survey of Executive Coaching in Spain)

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Translation: Jonathan Salinas
Executive Summary
HISTORY (I)

- Coaching is a newly emerging profession in Spain. Practically born in this century.
- EMCE’s project was originally created in April of 2006 with the intention of knowing and disseminate information about the current situation of the coaching profession in Spain, as well as to evaluate its development and detecting its possible needs.
- EMCE 06* started being published in November of 2006, it incorporated the results obtained in 2005 as well as its possible projection for 2006.
- We decided that this survey should be biannual, managed and developed independently by its authors.
- EMCE 08** was published in May of 2008, it incorporated the results obtained in 2007 as well as the possible projection for 2008.
HISTORY (II)

- EMCE’08 is unique and also the first national survey of executive coaching, which has received the approval of ICF Worldwide to include it into their web-portal, with the following remark:

  “EMCE 08 is a good example of how a research on coaching business can be designed and performed inside a country”

- Many other prestigious organizations have published EMCE’s, results, such as:

  Professional Coaching Publications, AECOP, Instituto de Empresa, etc.

- EMCE’10 *** was published in june’10, it incorporated the results of 2009 and its projection to 2010.
OBJECTIVE

Knowing the market of the individual executive coaching processes in Spain, from the coach perspective that works on it, helping them making decisions that will influence their performance and career development.

We understand this market as a description of:

- The players,
- Their practices,
- Their size in volume and value,
- Their projection for one year and
- Their unsatisfied needs that might help in their development.
RESULTS INTERPRETATION

- **Results:** They collect the survey participant answers, that cover the following chapters: training and demographics; the coaching profession; process characteristics, service procurement, hiring coaches, market assessment and coaching supervision.

- **Validation:** 126 validated questionnaires. Some of the answers were deleted during the validation process (some errors and answers that may be non acceptable).

- **Confidentiality:** We use an external provider to preserve the participants identity.
RESULTS INTERPRETATION

- **Reliability:** There is a limited reliability of the results as in other publications in this sector, because the difficulty of establishing a representative sample. Reliability, is thus based on the volume of answers. In our opinion, with all those answers collected, the reliability is "very acceptable" for most of the presented results, except for those specific areas such as “supervision” and “market value” areas, that we qualify as “fairly representative”.

COACH PROFILE ´11

- Man or woman, older than 41 years.
- Lives and works in Madrid.
- Has more than 3 years of experience.
- Offers other services, specially training services.
- Has 14 new coachees this year and performs 108 coaching sessions.
- Does 125 coaching sessions a year, single-mode, presence and external
- 8 sessions processes of 90 minutes/session during 6 months.
- Works in sales development, team/project integration and professional development with his coachee.
- Annual turnover: 24,123 €. (250 €/session)
SOME RELEVANT COMPARISONS ‘11/´09

- Annual turnover (€): 24.123 vs. 26.700
- Conducted coaching sessions: 108 vs. 125
- Nº of new coachees/coach: 14 vs. 17
- Coaching session rate (€): 250 vs. 230

(All are data averages)
Although, executive coaching in Spain, is facing a strongly growing phase of its life cycle, in our opinion, the economic crisis period, negatively affects the development, as we see in all the comparisons represented in the graphs (number of sessions, contracting companies, etc.).

- Only 9% improvement in the average rate per session.

- We believe that there are 280 “active” coaches, so the current market value is about 7 M €.

- Considering the above, we prefer not to make numerical forecasts of market development.
OPORTUNITIES (I)

Despite the crisis economic period, we estimate the following opportunities for the 2012/2020 period (growing phase)

- Increased number of coaches (increased demand for Coaches Training Centers: CTC’s)
- Need for market-clients and coachees education (Professional Associations and CTC's)
- Increased demand / requirement in training coaches (for better understanding of customers, competition between CCC’s, Continuing Education and Specialization)
- Increased demand for quality coaching services (Supervision and Professional Associations)
OPPORTUNITIES (II)

- Increased standardization of coaching practices (Associations and CTCs)
- Development of the video/telephone coaching modality (accessibility and flexibility)
- Emergence of coaching exercise niches (specialization according competencies/needs)
- Development of the “team” and “group” coaching.
- Development of internal coaching (cross coaching and manager-coaches)
- Increased demand for coaching tools (these service providers)
- Increased tools and services for the promotion of commercial coaching services (increased competitiveness)
OPORTUNITIES (III)

- Increase in the number of larger companies providing coaching services to the detriment of independent coaches (concentration of recruitment in global consulting firms and business schools)
- Narrowing the range of prices and progressive erosion of average prices (increased competitiveness)
- Acceptance and development of personal coaching (market that will move a high turnover)

* EMCE’06. Original project by: Jaime Bacás (Project director), Luis Picazo, Jorge Salinas, Emilio Arsuaga y Marta Capellán) sponsored by ICF España.

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Report Results
1. Gender (126)

- **Male**
  - 2009: 48%
  - 2011: 52%

- **Female**
  - 2009: 46%
  - 2011: 54%

Number of answers: 126
2. Age (126)

- ≤ 30: 5% (2011), 4% (2009)
- 31 - 50: 72% (2011), 72% (2009)
3. Nationality (126)

- Spanish: 93%
- European: 4%
- Others: 3%

Comparison between 2011 and 2009:
- Spanish: 92% (2011), 93% (2009)
- European: 4% (2011), 4% (2009)
- Others: 4% (2011), 3% (2009)
4. Province of residence (125)
5. Geographic area where you usually practice coaching (126)
6. Academic Degrees (126)
7. Do you think it´s necessary to receive training in order to be a coach? (117)

2009
- 93% Necessary
- 7% Convenient
- 0% Not necessary

2011
- 92% Necessary
- 8% Convenient
- 0% Not necessary
8. Do you consider accreditation necessary for working in the coaching field?

(117)

2009

- Necessary: 51%
- Convenient: 9%
- Not necessary: 40%

2011

- Necessary: 47%
- Convenient: 45%
- Not necessary: 8%
9. I obtained my degree/accreditation in coaching through (114)
10. In your training as a coach, how many hours of each modality? (112)
11. Resources preferred to use to further my development as a coach (112)

- **Workshops/seminars**
- **Specialization programs**
- **Coaching supervision**
- **Conferences**
- **Webinars/e-learning**
- **Others**

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<th></th>
<th>2009</th>
<th>2011</th>
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<td>Workshops/seminars</td>
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<td>Others</td>
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12. Preferred areas for development (110)

- Others
- Bioenergetics/Focusing
- Psychodrama
- Gestalt
- Constellations
- Transactional Analysis
- Sales/Service coaching promotion
- C. Rogers, Maslow
- Personality Test
- PNL

2009
2011
13. Years practicing coaching professionally (112)
14. Ethical dilemmas in the practice of coaching (106)
15. Country where you practice mostly (110)
16. Languages you can use in your practice (111)
17. Do you offer other services besides coaching? (111)
18. Other services that coaches offer (93)

- Training
- Leadership
- Human Resources Consulting
- Teambuilding
- Mentoring
- Selection
- Others
- Outplacement
- Head Hunting

Year comparison:
- 2009
- 2011
19. Types of coaching (111)

On 183 total of answers

2009:
- Individual: 49%
- Group/Team: 37%
- Both: 97%

2011:
- Individual: 56%
- Group: 31%
- Team: 99%
20. Fields in which coaching is performed (110)
21. Associations which you are affiliated (96)

- EMCC AECOP: 45% (2011), 77% (2009)
- ASESCO: 17% (2011), 17% (2009)
- Other: 8% (2011), 7% (2009)
22. Formalize a “contract” with the coachee, besides the official one with the organization (106)
23. Average length (in minutes) of your coaching sessions (106)
24. Average length (in hours) of your coaching processes (106)
25. Average length (nº of sessions) of your coaching processes (106)
25. Bis. Average length (nº of months) of your coaching processes (106)
26. Average number of sessions according to coachee profile (93)

- 2011
  - More than 16
  - 14 -16
  - 11-13
  - 8-10
  - 4-7
  - 0-3

- 2009
  - More than 16
  - 14 -16
  - 11-13
  - 8-10
  - 4-7
  - 0-3
27. Used Tools (93)

- **Feedback 360°**: 68% (2011), 39% (2009)
- **MBTI**: 26% (2011), 14% (2009)
- **Thomas**: 4% (2011), 3% (2009)
- **FIRO-B**: 4% (2011), 3% (2009)
- **None**: 17% (2011), 16% (2009)
- **Other**: 41% (2011), 25% (2009)
27. Bis. Other used tools (95)

<table>
<thead>
<tr>
<th>DISC</th>
<th>FB 360</th>
<th>MBTI</th>
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<tbody>
<tr>
<td>DAFO</td>
<td>GROW</td>
<td>EDA</td>
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<td>EMOTIONAL INTELLIGENCE</td>
<td>TDA</td>
<td>BIP</td>
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<td>PDA</td>
<td>VEA</td>
<td>COMPETEA</td>
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<tr>
<td>BELBIN</td>
<td>LIFE WHEEL</td>
<td>FIRO B</td>
</tr>
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</table>
28. Average time (in minutes) spent in session preparation (99)

- **More than 61**: 0%
- **41-60**: 10%
- **21-40**: 30%
- **1-20**: 50%

Comparison between 2009 and 2011.
29. Coachee withdrawals from processes (95)

2011: 6.9% withdrawals

Total Coachees

Withdrawals

2011

2009

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30. Coachees objectives (102)

- Change Management
- Corporate Restructuring/Mergering
- Professional Career Redesign
- Interpersonal Relation
- Team Management
- Sales Skills Improvement
- Personal-Professional Balance
- Time Management

2011:
- Professional Promotion
- Team/Project Integration
- Professional Career Redesign
- Interpersonal Relations
- Team Management
- Sales Skills Improvement
- Time Management/Personal-Professional Balance

2009:
- Less Frequently
- Medium Frequently
- Very Frequently
31. Delivers report at the end of the coaching process (99)

Bar chart showing the distribution of how reports are delivered at the end of coaching processes:
- Only the coachee: 21% in 2011, 19% in 2009.
- Only to the company: 6% in 2011, 6% in 2009.
- Both (with the coachee's consent): 40% in 2011, 30% in 2009.
- None: 32% in 2011, 45% in 2009.
32% of the clients require that the coach has:...

- Specific Training in Coaching: 47% (2011), 44% (2009)
- Experience in Coaching: 67% (2011), 54% (2009)
- Provide Referrals form other Clients: 38% (2011), 22% (2009)
33. “Added” benefits for the coachees (102)

- **Self Control**
- **More Freedom**
- **Self Consciousness**
- **Self Confidence**
- **More Pro-Active**
- **Stronger Commitment**

**2011**
- Always
- Frequently
- Sometimes
- Never

**2009**
- Always
- Frequently
- Sometimes
- Never

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34. Where do sessions take place (102)

- **Always**
- **Almost Always**
- **Frequently**
- **Sometimes**
- **Almost Never**
- **Never**

**2009**
- **Others**
- **Public Places**
- **Office Space Rented to Another**
- **Coach Office**
- **Coachee Office**

**2011**

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35. What is the number of companies that hired your coaching services in 2011? (91)

Average: 6.5 companies/coach (2011)
Average: 6.0 companies/coach (2009)
36. What is your estimated number of companies that will hire your coaching services in 2012? (93)
37. Have you participated in coaches selection procedures where you have been interviewed among other coaches-candidates? (90)
38. Who hires you as a coach? (83)

2009
- The end user organization: 58%
- An intermediary organization (consulting company, etc.): 42%

2011
- The end user organization: 64%
- An intermediary organization (consulting company, etc.): 36%
39. Who makes the final decision to hire you (commercially) as a coach in the hiring organization/company? (91)
40. How do you charge your fees? (85)
41. New coachees in 2011 (85)

2011: 1,190 coachees; 85 coaches; average: 14 coachees/coach
2009: 1,860 coachees; 105 coaches; average: 17 coachees/coach
42. How many coaching sessions have you done in 2011? (84)

2009: 13.123 sessions; average 125 sessions/coach
2011: 9.049 sessions; average 108 sessions/coach
43. Estimated number of new coachees for 2012 (coachees/coach)? (84)

1,250 Coachees estimated for 2012  
14,9 Coachees/Coach estimated for 2012
44. Estimated number of coaching sessions for 2012 (84)

9.854 sessions; 84 coaches; 117 sessions/coach
45. Types of coaching (80-48-48-37)

- Face to Face: 7,736
- By phone: 13,685
- Videoconference: 1,601
- E-mail: 76
46. 360° feedback sessions (68)

1,280 sessions; 49 answers; Average: 26 sessions/coach
Deleted 18 answers with 0 sessions
47. 360° feedback sessions estimation for 2012 (67)

1.805 sessions, 49 answers; Average: 36.8 sessions/coach
48. Average fee per coaching session (direct hiring, from end customer) (73)

Deleted 7 answers of < 50 €
Average in 2007: 305 €
49 BIS. Fee per coaching session (direct hiring) (76)

Deleted 7 answers of < 50 €
50. Fee per coaching session (indirect hiring) (56)

Deleted 9 answers of < 50 €
51 BIS. Average fee per coaching session (56)

Deleted 7 & 9 answers.
52. Average fee paid to the intermediary companies (consulting firms, etc.) by the hiring organizations (15)

Deleted 10 answers lower than 50 €
Total turnover in ‘11: 1.688.630 € (70 answers)
12 answers lower than 1000 €/year have been eliminated
54. Estimated turnover for 2012 (81)

12 answers lower than 1000 € have been eliminated.
Total estimated turnover for ‘12: 2,360,800 € (69 answers)
55. Reasons that hinder a more effective sale of executive coaching (71)

- Business Skills: 8% (2011) to 16% (2009)
- Skills to publicize my services (marketing): 15% (2011) to 20% (2009)
- Lack of time as a salesman and coach: 58% (2011) to 45% (2009)
- Competition: 4% (2011) to 6% (2009)
- Others: 14% (2011) to 13% (2009)
56. In case that you sell service of executive coaching. Reasons why your proposals have been approved? (73)
57. Did you have coaching supervision? (81)

2009

- Yes: 58%
- No: 42%

2011

- Yes: 40%
- No: 60%
58. **Nº of individual sessions of supervision received (39)**

<table>
<thead>
<tr>
<th>Year</th>
<th>0 - 4</th>
<th>5 - 8</th>
<th>9 - 12</th>
<th>More than 12</th>
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</thead>
<tbody>
<tr>
<td>2009</td>
<td>9%</td>
<td>20%</td>
<td>9%</td>
<td>63%</td>
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<tr>
<td>2011</td>
<td>8%</td>
<td>44%</td>
<td>8%</td>
<td>41%</td>
</tr>
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</table>
59. Length in minutes. Individual supervision sessions (39)

2009
- 30 min. 27%
- 60 min. 48%
- 90 min. 18%
- 120 min. 3%
- More than 120 min. 3%

2011
- 30 min. 0%
- 60 min. 15%
- 90 min. 15%
- 120 min. 67%
- More than 120 min. 3%
60. How the supervision sessions are paid (34)
61. Total amount invested in individual supervision (26)

Deleted 7 answers lower than 100 €/year
28,600 €/year in 19 answers
62. Group supervision. Nº of members in the group. (28)

- 2009:
  - 2 - 4: 28%
  - 5 - 8: 41%
  - 9 - 12: 21%
  - 13 - 15: 7%
  - More than 15: 4%

- 2011:
  - 2 - 4: 18%
  - 5 - 8: 32%
  - 9 - 12: 39%
  - 13 - 15: 7%
  - More than 15: 4%
63. Number of supervision sessions received in group (28)

### 2009

- 0 - 4: 14%
- 5 - 8: 17%
- 9 - 12: 21%
- More than 12: 48%

### 2011

- 0 - 4: 18%
- 5 - 8: 14%
- 9 - 12: 4%
- More than 12: 64%
64. Length (in minutes) of the group supervision sessions (28)

**2009**
- 90 min.: 36%
- 120 min.: 29%
- 180 min.: 18%
- 240 min.: 7%
- More than 240 min.: 11%

**2011**
- 90 min.: 29%
- 120 min.: 29%
- 180 min.: 11%
- 240 min.: 14%
- More than 240 min.: 18%
65. How group sessions are paid (26)

- Per hour:
  - 2009: 12%
  - 2011: 7%

- Per session:
  - 2009: 46%
  - 2011: 43%

- Per process:
  - 2009: 42%
  - 2011: 50%
66. Total investment made in group supervision (17)

Deleted 6 answers < 100 €
20.998 €/year in 19 answers
67. Matters that were supervised (individually and in groups) (41)

- Incompatibility between coach and coachee (religious beliefs, politics, etc..)
- Ethical conflicts
- Empathy with the coachee
- Respecting the coachees´freedom/choices
- Separation between coaching and therapy/psychiatry
- The coach emotional blocking
- Difficulty understanding the coachee
- Insufficient technical knowledge to assist the coachee in special situations

[Bar chart showing percentages for 2009 and 2011]
68. Criteria used to choose a supervisor (43)

- Experience as a coach
- Experience as a supervisor
- References
- Technical orientation (ontological, humanist, NLP, etc.)
- Fee

2009 vs. 2011
69. If you don’t receive supervision, would you like to? (45)
70. Have you acted and formally charged as a supervisor? (79)
71. If you have supervised, please tell us what training you have received. (24)

- None
- Specific Training Program
- Workshops
- Reading
- Practice/learned from own supervision sessions

Comparison between 2009 and 2011.
72. Will you invest in specific training to become a supervisor? (75)

- Yes: 59%
- No: 41%
73. Some comments and suggestions.

- Congratulations on the development and management of the survey. Great job!
- Thorough survey. Encouragement to get return to effort.
- I hope that this survey will serve to reinforce the image and presence of our profession at the organizational level.
- Excellent questionnaire. I am confident that the results will be useful to the profession. Thanks.
- From Organizations, associations, etc. what coaches really need is that coaching gets recognized as a profession and to regulate their trade in Spain, separated from the psychologists. To exercise it in Spain separately from psychologists. The first step is to have a code in the CNCAE for property.
- Thanks for making and disseminating this study, it is interesting and necessary.
- Your surveys are very useful and valued in the sector. Thank you very much.
- It could be possible to make the same survey for the personal coaching market. It would be so useful.
- I sense there is ignorance and reluctance to invest in coaching. I lack skills to sell and spread the use of coaching.
- It was very instructive. Reflection helps me to keep learning. Thank you.
- Thanks to you, continue for many years!.
- Very valuable! I propose the following areas to be narrow: What does the client demand when sending an employee to a coaching process.
- What’s the obtained result when finishing the coaching initial objective? It doesn’t appear the work from more than 1 coach, in a “team mode” for example.
- I’ve received individual supervision from another coach, who at the same time has done it to me too, without costing any fee in both cases.
- In the first questions I didn’t have a time reference. I think that this survey is really important, I wish to know that is also done in other countries.
- The survey results are so valuable. Thanks.
Thanks for participating!

Your contribution makes possible that we have this information that allows us to learn more about our profession and make the appropriate decisions to manage it to where we want.

We thanks, specially, your contribution with disseminating this results into the following organizations and institutions:

AECOP, ASESCO, ICF Worlwide,
Atesora, Lider-Haz-Go! y Coaching de Ventas

We’ll See you again in E.M.C.E’14!
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