

HENLEY BUSINESS SCHOOL

Future Trends in Coaching

Executive Report 2021

Jonathan Passmore

EMCC
European Mentoring &
Coaching Council



Henley
Business School

UNIVERSITY OF READING

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The data presented in this report is based on survey responses and thus reflects the collective views of those responding at the time of the survey, which was conducted during a four-week period in June 2021. University researchers and students may use the information contained in this report for their research and academic study. Commercial organisations must seek permission to reproduce any tables or associated information contained in this publication. If consent is granted, the report must be cited and attribution given to the European Mentoring and Coaching Council (EMCC) and Henley Centre for Coaching. Copyright ©2021 ISBN 978-1-912473-32-8

Contents

Introduction.....	4
Section 1: Biographical information	5
Section 2: The impact of Covid-19	9
Section 3: Coaching practice.....	13
Section 4: Team coaching	20
Section 5: Future trends.....	22
Conclusions	23
References	24

Introduction

This report provides an overview of the main findings from the 2021 Future Trends research project. The study was planned in 2020 and undertaken during a four-week period in June 2021. This is one of a number of publications that aim to share the results from this study. This Executive Report is available free and can be downloaded from the Henley Business School, CoachHub and EMCC websites.

Research methodology

The aim of the research project was to take a snap-shot of the current views of coaches about the future landscape, as the world started to consider the new normal.

The survey aimed to collect responses from 1000 professional coaches. 'Professional coaches' is defined as individuals who generate some or all of their income from providing coaching services to clients or who are employed to deliver coaching as part of their job.

The research questions were designed by the researchers in collaboration with the EMCC Research Committee, as well as with input from colleagues such as Professor David Clutterbuck and Professor Peter Hawkins at Henley Business School. Our thanks is due to all those who contributed to the process.

They were adapted during an initial pilot phase. Specific care was taken to devise the questions in the Diversity and Inclusion section. The researchers used as a starting point the diversity and inclusion (D&I) categories devised by the American Psychological Association (APA). These were revised to reflect a global population, and diversity, equity and inclusion (DE&I) specialists



were consulted. This saw the addition of self-categorising options. This is a complex and sensitive area. As researchers, we recognise that while the diversity of the world can never be fully captured by any signal classification system, a failure to collect data on diversity in the coaching industry leaves us unable to measure levels of inclusion, and thus unable to devise actions to remove barriers.

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

The questionnaire consisted of four streams:

1. Team coaching
2. Digital and online coaching
3. Future trends
4. Diversity and inclusion

Participants took, on average, 17 minutes to complete the questionnaire.

Research partnership

European Mentoring and Coaching Council (EMCC)

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

Henley Centre for Coaching, Henley Business School, UK

Henley Centre for Coaching is a research, coach training and continuing professional development (CPD) centre based within Henley Business School. The Centre is recognised as a world leader for coach training and research, providing accredited executive coach, team coach and supervision training.

CoachHub

CoachHub is the leading digital coaching provider offering holistic people development on a global scale. CoachHub aims to democratise coaching through its platform, offering remote and online coaching and learning. It currently operates across 70+ countries worldwide, through its network of 2,500 coaches, with offices in New York, Berlin, London and beyond.

Research team

The research was undertaken by Professor Jonathan Passmore, with the support from a wide number of colleagues, especially Sophia Tewald, and organisations, including EMCC and CoachHub. This reflects the collaborative nature of the coaching industry, coming together in the interests of all to explore the impact of Covid-19 and the changing coaching landscape during 2019–21.

Section 1: Biographical information

A total of 1,380 responses were received over the four-week period, of which 1,266 consented to their data being included. Responses were received from 79 countries.

Just under 80% of participants agreed to share their biographical data, including gender, race, disabilities and sexual orientation.

We choose to include this data as, to date, no research has been undertaken on the make-up of the coaching profession beyond gender.

Claims have been made about some groups being underrepresented, specifically Black, Indigenous and people of colour (BIPOC) coaches, in some geographical areas, for example in the UK and US (Roche & Passmore, 2021). However, no data has previously been published to support these claims. This survey provides the first evidence that, at a country level, this view appears to be supported. Questions can rightly be raised

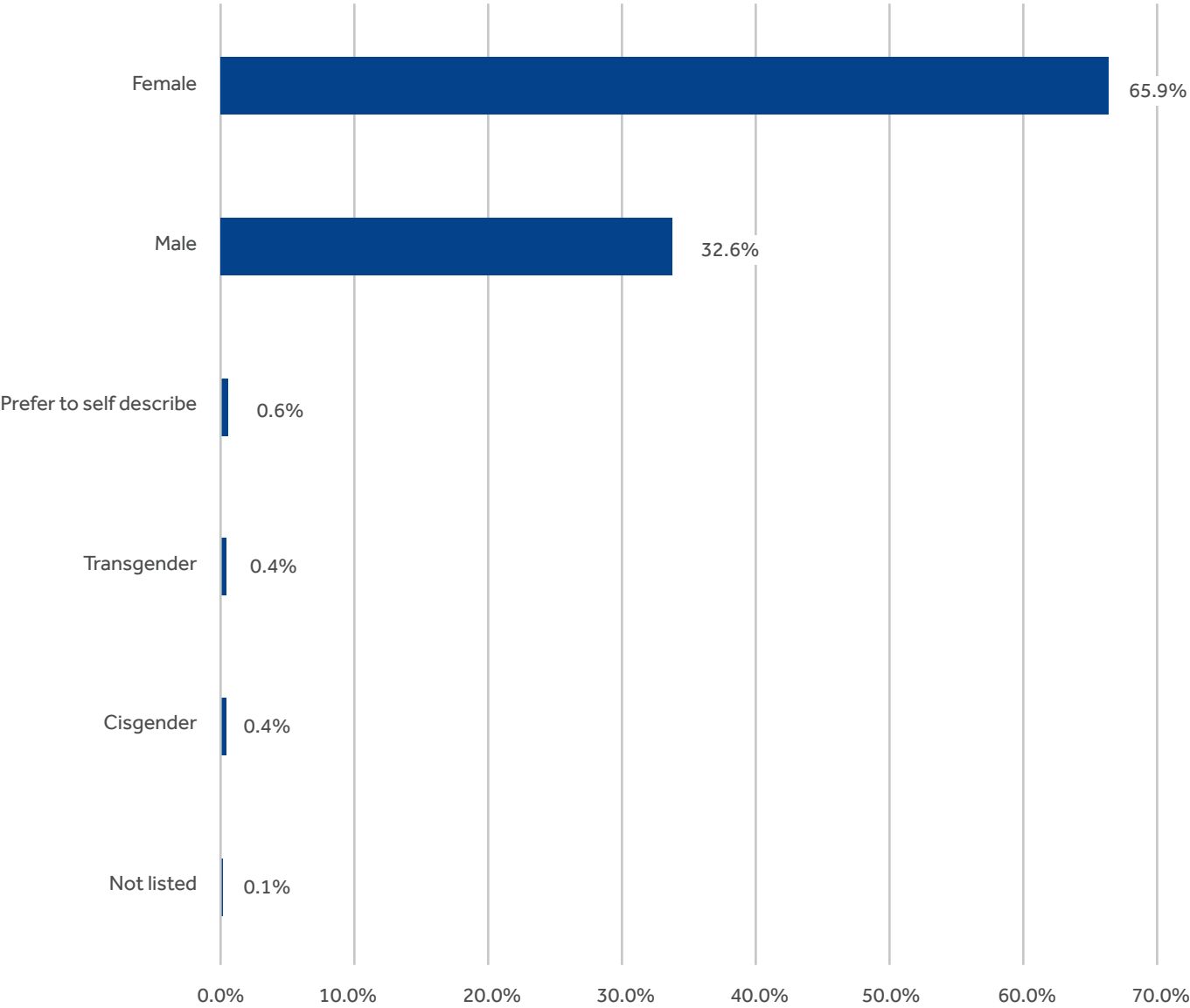
about the representative nature of the sample. However, a review of the gender and sexual orientation data suggests this sample is broadly representative of the coach community (gender) and global data (sexual orientation) and thus some confidence can be placed on the representative nature of the sample.

Gender and age

The data on gender showed a division, with 66% female and 32% male completing the survey, with individuals also identifying as cisgender, transgender and those preferring not to describe. The male–female division is comparable with other studies, for example the State of Play in European Coaching and Mentoring (Passmore et al, 2017) research.

The average age of participants was 54, ranging from 24 to 80. The average age of men was 55 and the average age of women 53.

Figure 1: Gender (all participants)



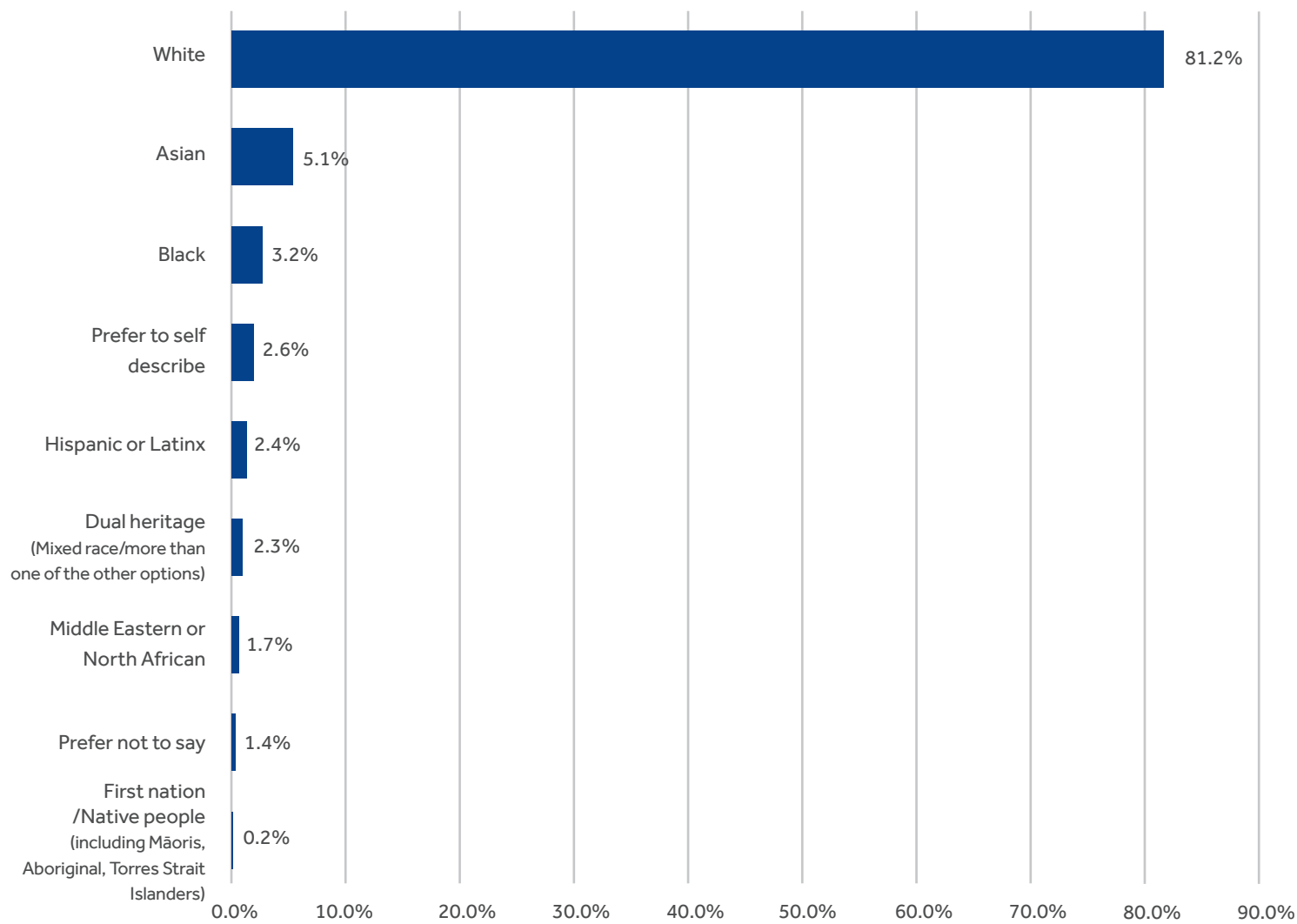


Race and ethnicity

Considerable work was undertaken to devise, pilot and review the categories for race. The original categories were devised by the American Psychology Association (APA) and adapted in consultation with DE&I experts for a global population. We recognised that by limiting the options we could not capture all identities and, as a result, we also included a 'self-categorisation' option. Individuals who selected this option used words such as 'human', 'Jewish', 'Indian' and 'Celtic' to describe their identity.

The results showed 86.6% of respondents who answered this question identified as 'White' while 3.5% identified as 'Black' and 2.4% as dual heritage and 1.4% preferred to self-describe. A deeper dive into the data at a national level, for example in the UK or US, suggests that some racial groups appear to be underrepresented when compared to the national statistical data for ethnicity in these countries. More work needs to be undertaken to understand these results.

Figure 2: Race and ethnicity



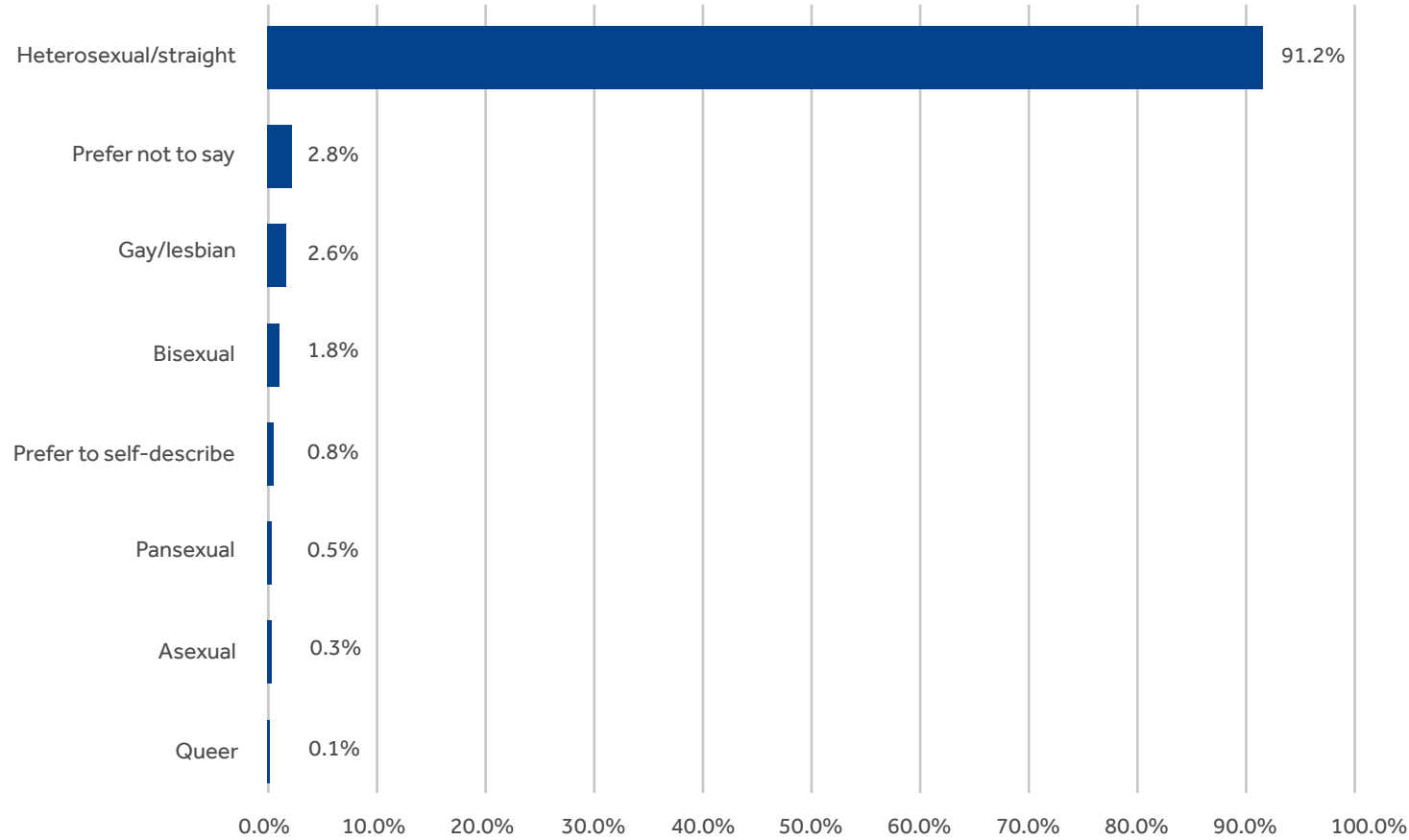
Sexual orientation

Estimates on gay, lesbian and bisexual representation vary widely depending on the source and country. The UK’s Office for National Statistics data provides a figure of 2.2% for individuals identifying as gay or lesbians (ONS, 2018). Australian data suggests a figure of 1.9% gay men and 1.2% lesbians (Richters et al, 2014). While The Williams Institute at UCLA School of Law (USA), a sexual orientation law thinktank, released a 2011 study estimating that 1.7% of American adults identify as gay or lesbian, while another 1.8% identify as bisexual. In comparison, in a nationally representative, face-to-face survey with over 2,500 Germans (55% female), it was found that 86% of men and 82% of women identify as exclusively heterosexual, 3% of men and 4% of women are mostly heterosexual, 1% of each sex declared themselves bisexual, and 1.5% as predominantly or exclusively homosexual. Other sexual orientations were reported by 3% of men and 4% of women. One per cent of each sex was uncertain. Four per cent of men and 7% of women gave no answer (Haversath et al, 2017).

The data from this study, showed 91.2% of respondents identified as heterosexual, 2.8% preferred not to say, with 2.6% identifying as gay or lesbian, and 1.8% as bisexual. The full breakdown is provided in Figure 3. It should be noted that the data is based on a global sample; where, in some countries, gay and lesbian identities are illegal, the results appear to broadly reflect the statistical data from countries in which such identities are not illegal, such as the US, UK, Australia and Germany.



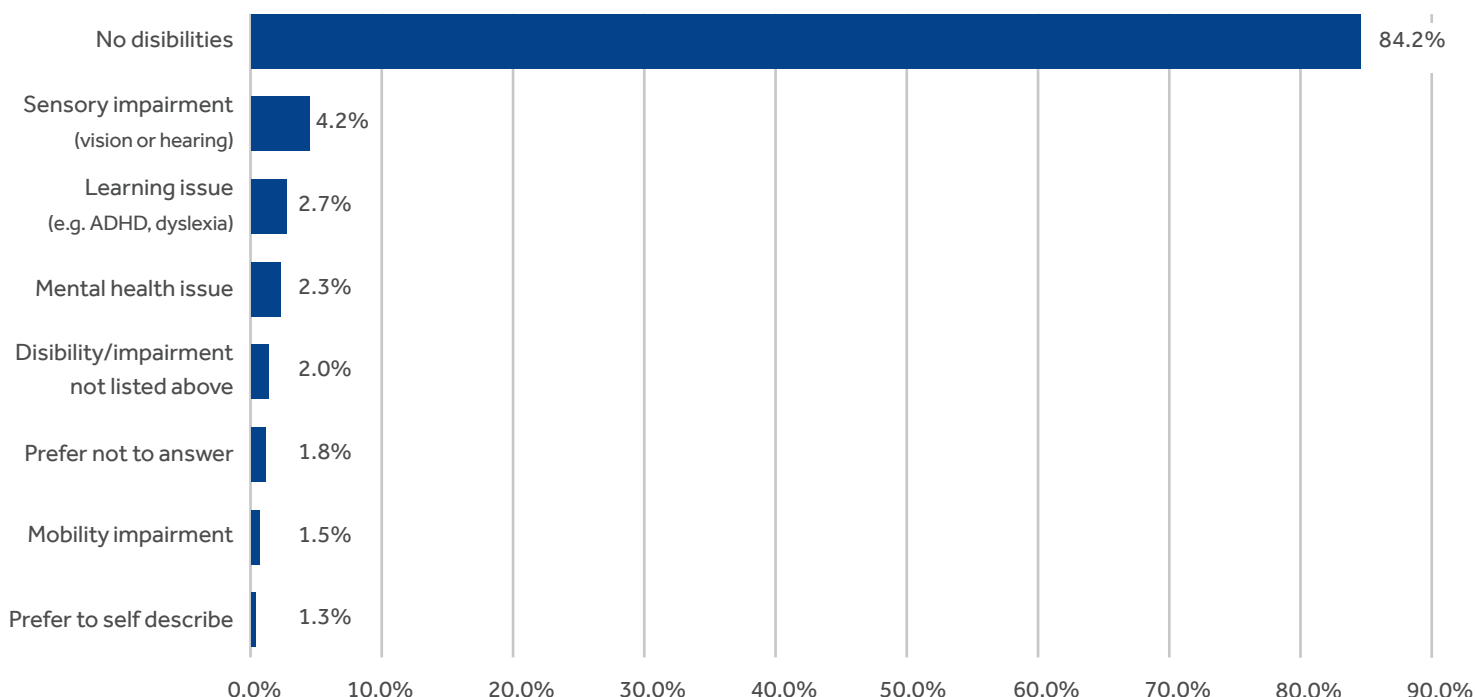
Figure 3: Sexual orientation



Disability

From this survey, 84.2% of respondents described themselves as having 'no disabilities', with 4.2% classifying their disability as 'sensory', 2.8% experiencing some form of 'neurodiversity' which affects learning and 2.3% a mental health issue.

Figure 4: Disability

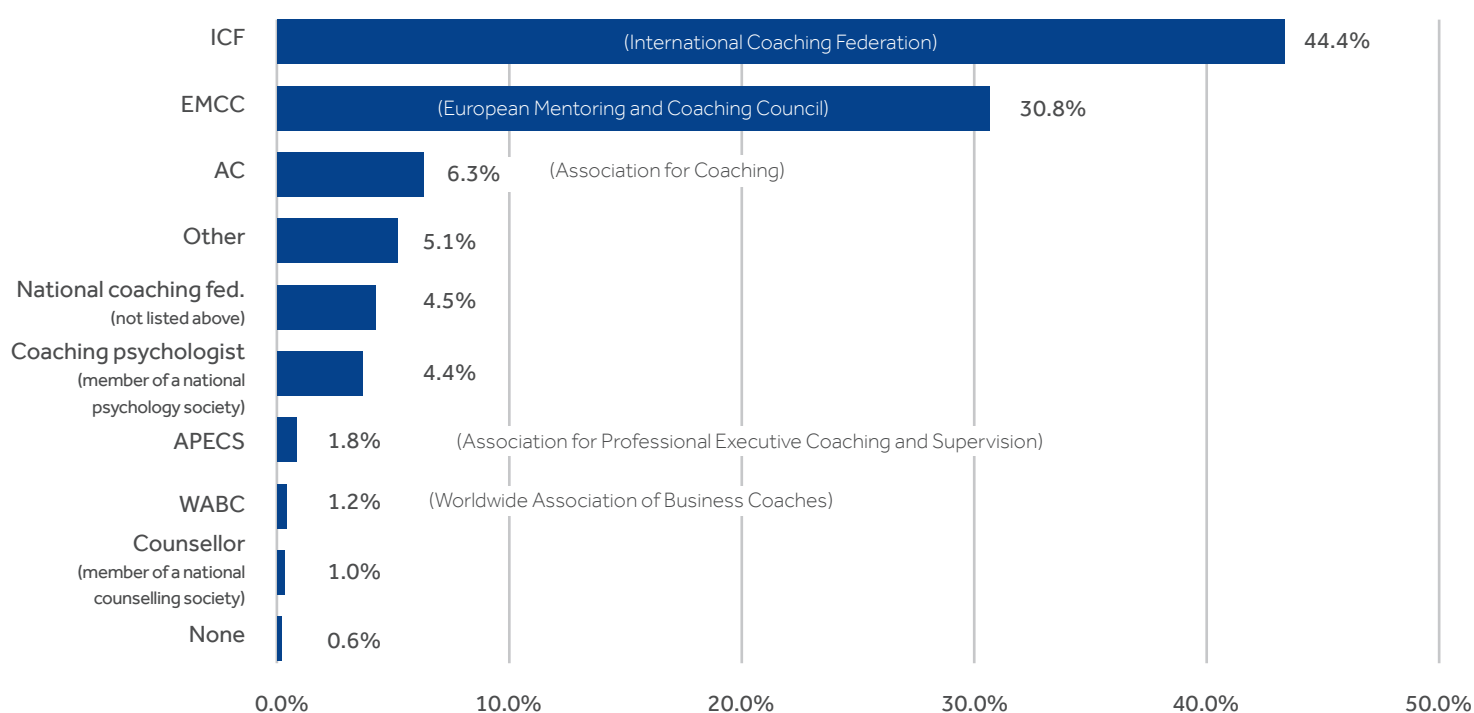


Professional membership

The largest number of participants identified as members of the International Coaching Federation (ICF) at 44.4%, with 30.8% identifying as members of the EMCC and 6.3% as members of the Association for Coaching (AC). These numbers broadly

reflect expectations based on global membership numbers, and reflect, in order, the size of the three largest coaching bodies. Psychologists were also strongly represented, with just under 1 in 20 (4.4%) of coaches reporting membership of national psychological bodies.

Figure 5: Professional membership



Section 2: The impact of Covid-19

As part of this study, we wanted to explore the impact of Covid-19 during the 2019–2021 period. We recognise that, as of now (summer and autumn 2021), the global pandemic is not over. In many parts of the world, the level of infection is growing or remains high. In some cases, countries were still in various stages of government-imposed restrictions as a result of second, third or fourth waves. However, the decision to explore this theme was taken because most countries have experienced previous waves of infection and, as a result, many coaches were beginning to think about what a 'new normal' way of operating would be in a world where Covid-19 remains an endemic infection.

What we saw from the data was that most coaches were self-employed and the impact was very mixed, with some experiencing reduced income (21%), others increased income (12.49%), some increased hours of work (18.94%) and others reduced hours of work (18.05%). In essence, there were winners and losers. This view was echoed by the ICF 2020 survey (ICF, 2020), but we were able to step behind these broad categories to explore who were the winners and losers. This detailed statistical analysis is to be included in future journal papers.

When we turned to client issues (Figure 10), what emerged was the impact of challenges brought by the pandemic, mixed with everyday coaching issues. The top three issues reported by coaches were balancing work–life priorities (19.11%), followed by relationships at work (17.94%) and stress (17.78%).



Figure 6: Impact of Covid-19 on coaches

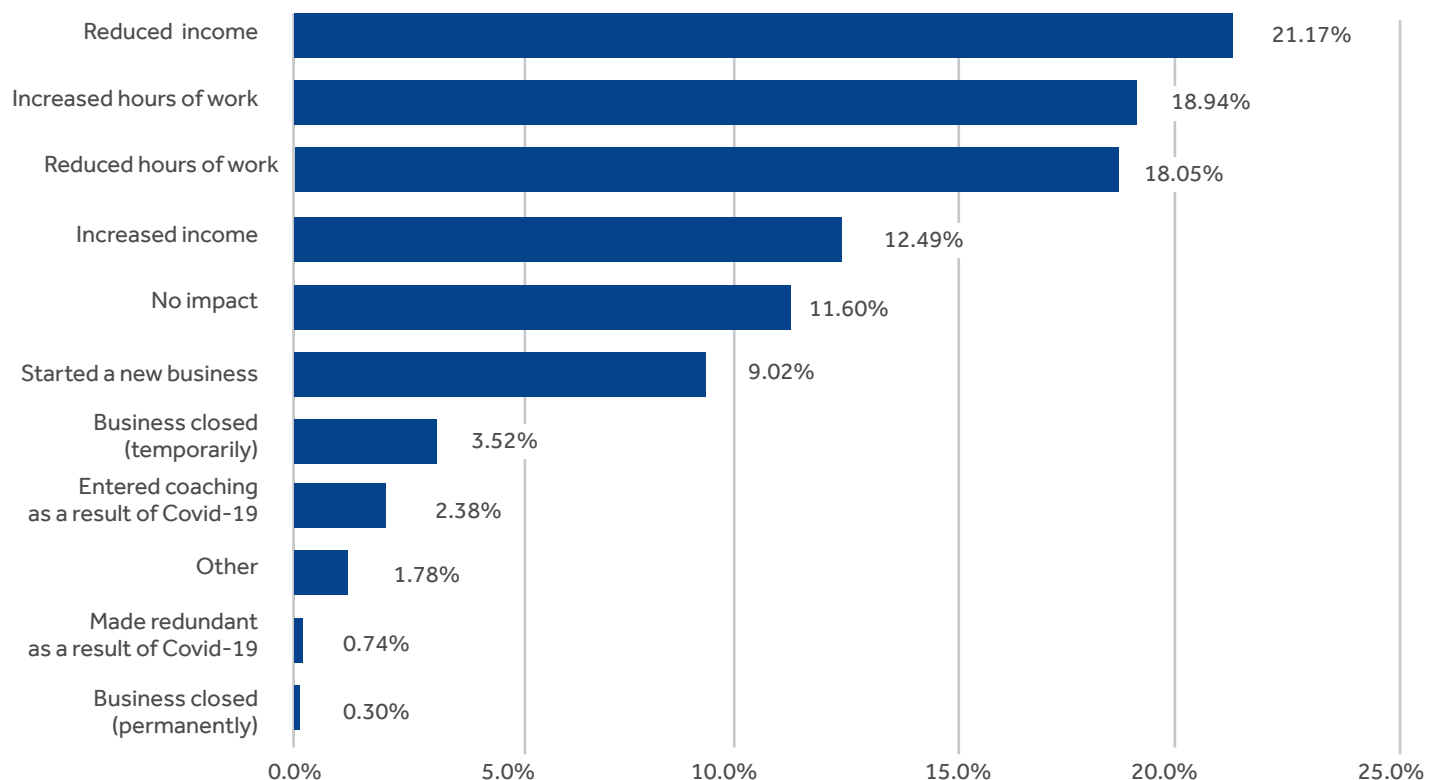




Figure 7: Impact of Covid-19 – Coaching clients

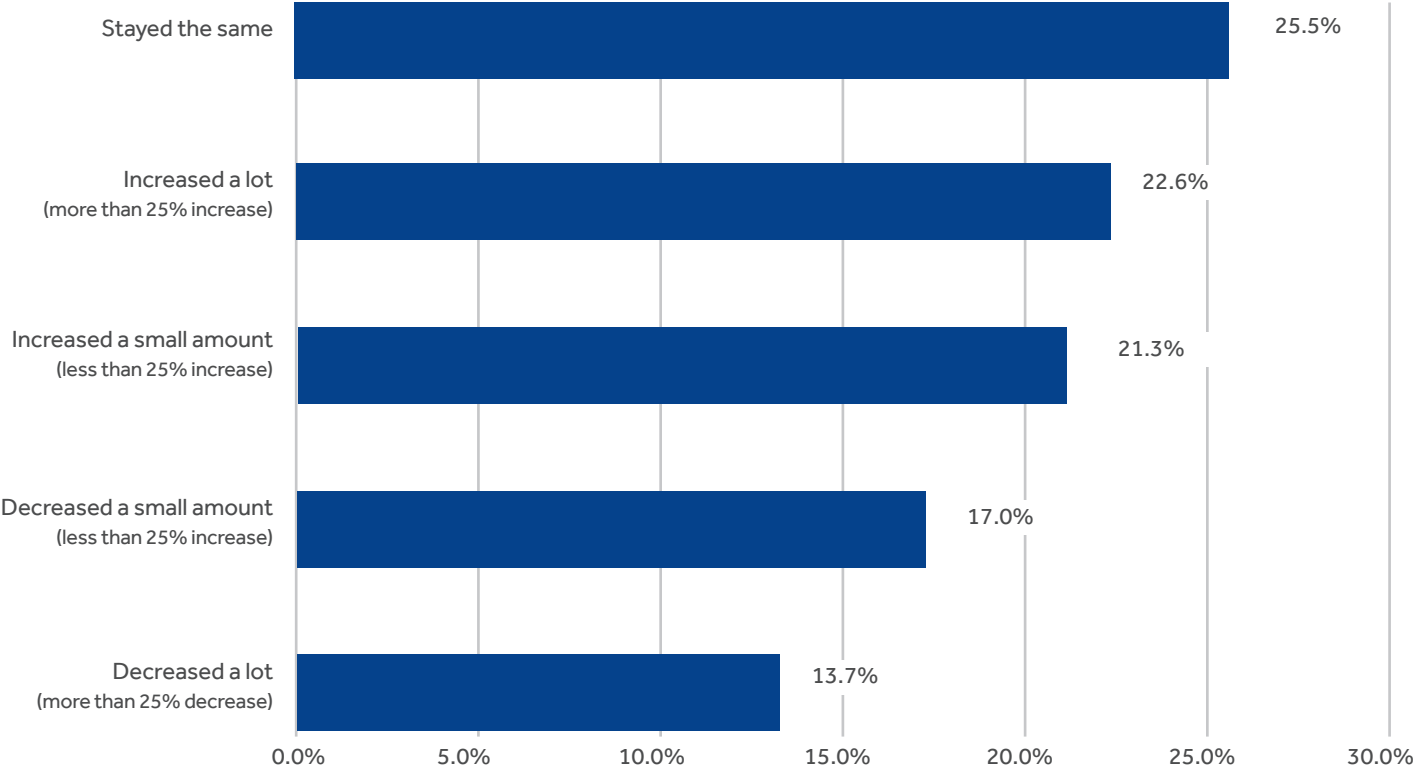


Figure 8: Impact of Covid-19 – Income from coaching

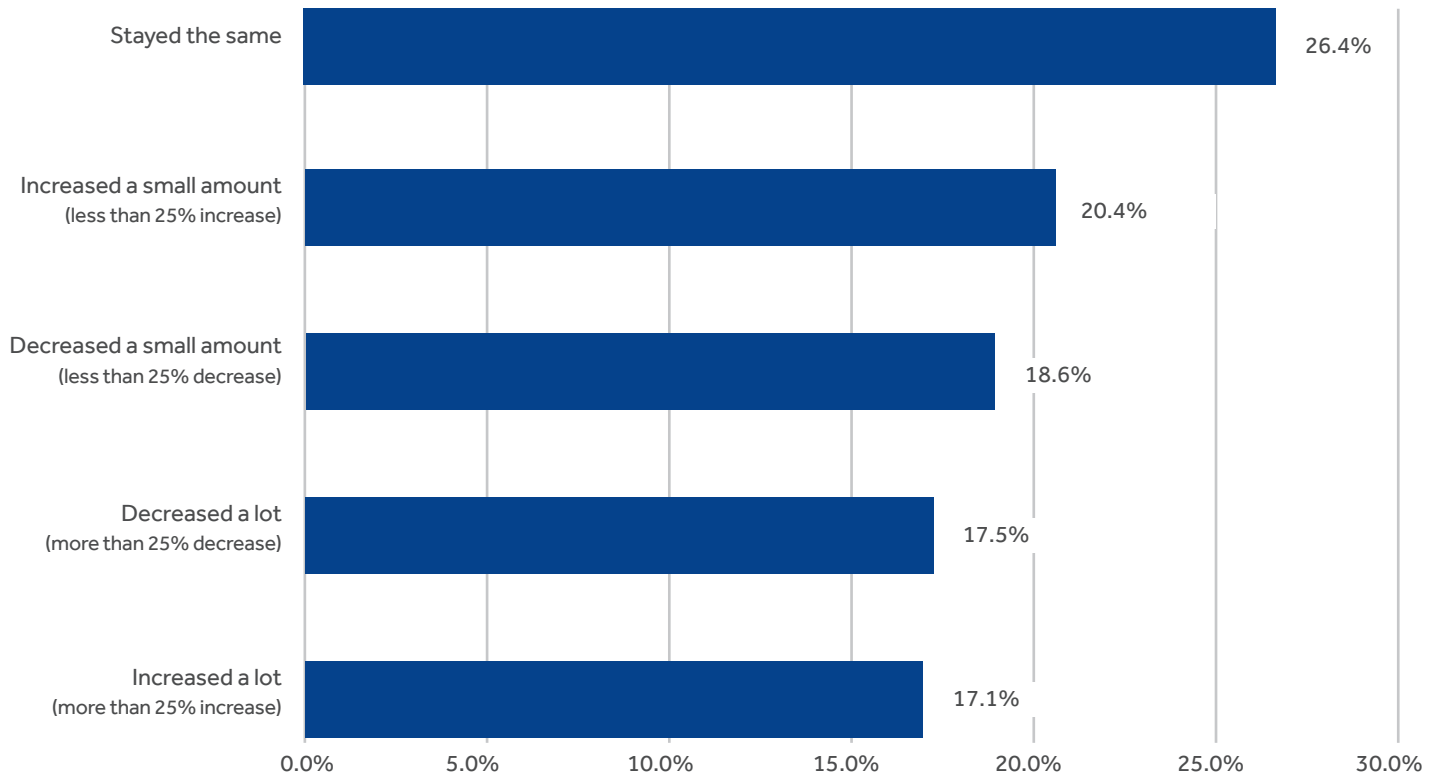


Figure 9: Impact of Covid-19- Coaching hours

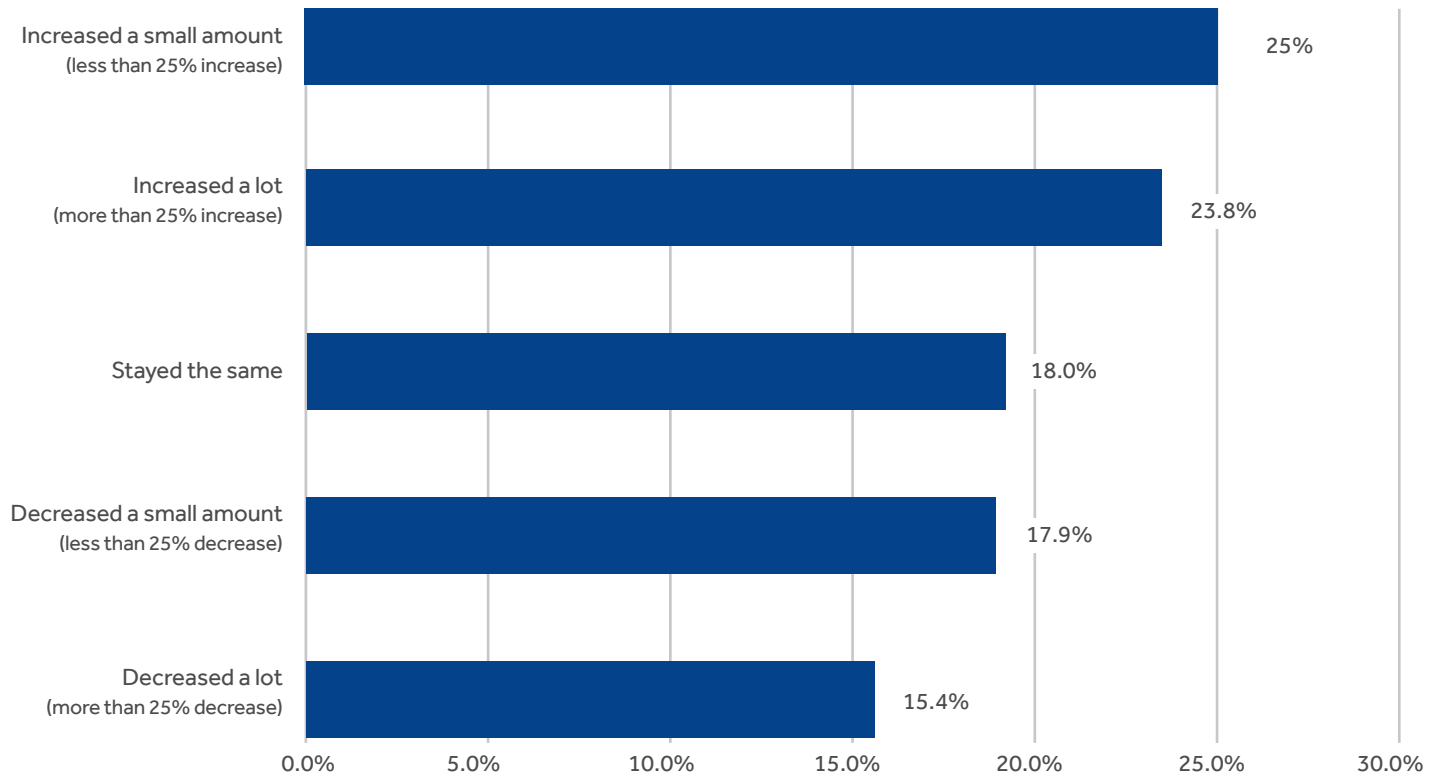
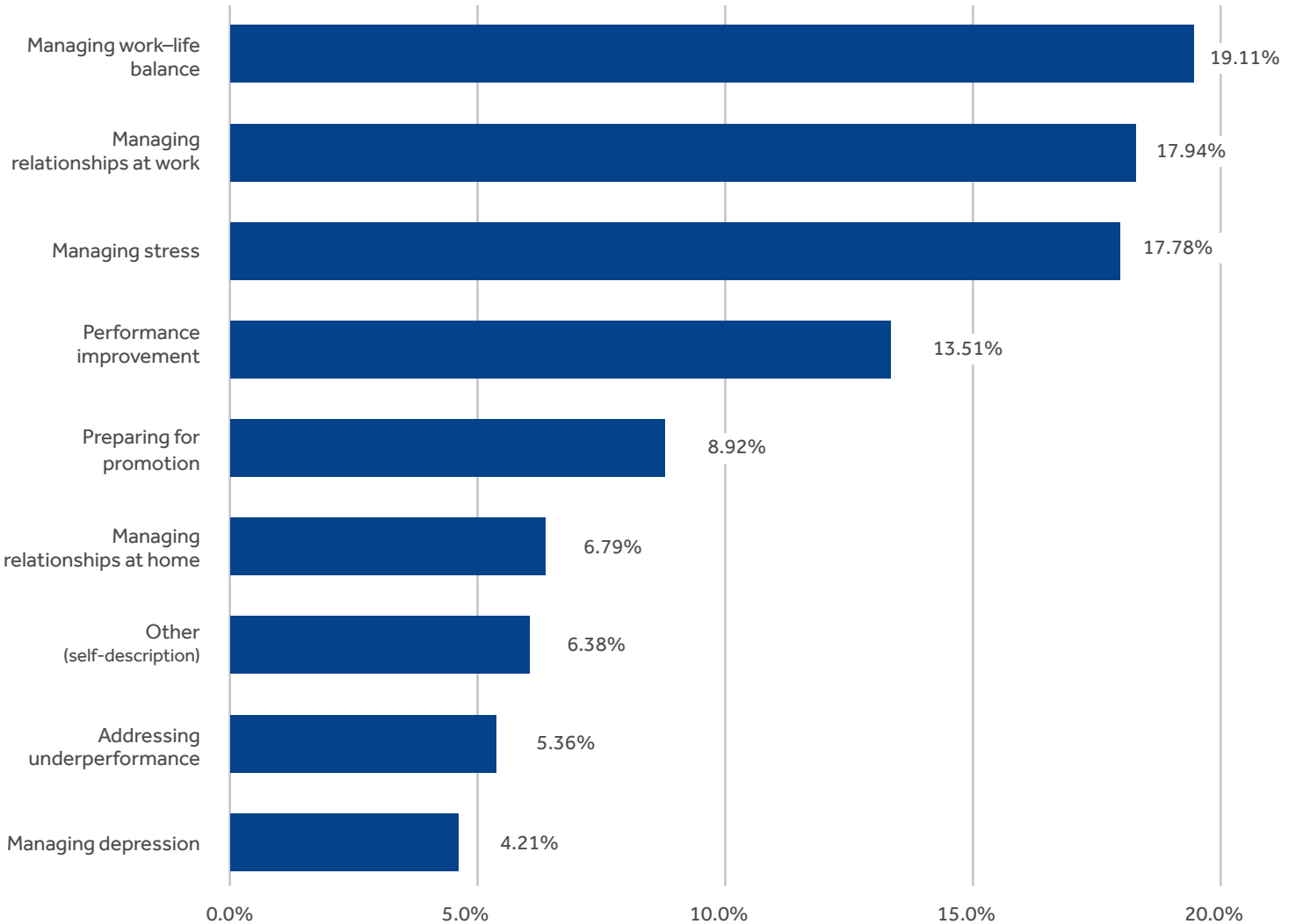


Figure 10: The top client issues in 2020



What was the biggest challenge you faced as a coach during Covid-19?

We also asked coaches about the challenges they faced during Covid-19. This was included as a free field for coaches to write about their challenges. Common responses included 'isolation', 'online home working' and 'managing emotional content' during this period.

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Trainers need to understand how to equip coaches to work online, using tools to best effect and ensuring set up is optimal for effective working



Several implications are raised by the rapid growth of online working, both over the past five years and especially due to its acceleration during Covid-19, with many coaches now working exclusively or significantly at home. The first of these implications is the importance of support networks, specifically of supervision, and beyond this, the potential role for peer networks and other communities of practice. Secondly, there are implications for the potential role of coach training programmes. Previously, coach training has been undertaken face to face, with little or no reference to online working. Coach trainers now need to understand how they equip their coaches to work online, using the online tools to best effect and ensuring their equipment and set up is optimal for effective working.

Section 3: Coaching practice

Hourly coaching fee rates

The issue of fee rates is a popular topic for both new and established coaches alike. Such information however is rarely freely available. In The State of Play research (Passmore et al, 2017), we collected categorical data and presented this as fee rates at a national level, using different bands for fees. This time we invited coaches to share their average annual fee rates for different types of work. We also collected country of residence, gender and racial groups, and thus are able to analyse data, comparing different countries, and to explore how race and gender were related to fee rates.

From our previous work, we were aware that fee rates depended on several factors. One factor was who was commissioning the work (Passmore et al, 2017), with self-funding individuals being charged lower rates than organisational clients. There is a commonly used economic explanation for this differential: willingness or ability to pay. We also previously demonstrated that fee rates vary between countries (Passmore et al, 2017). This national difference might be explained by two factors: coaching market maturity and per capita national GDP.

Gender and race appear to be factors in fee rates for organisational work, echoing wider economic disparities in society

In this study, two further factors emerged related to fee rates: gender and race. In the previous research study (Passmore et al, 2017), gender was a better determinate of fee rates than experience, level of training, engagement with supervision or qualifications. In this study, we selected the country with the highest response rate and used this data to examine gender and race as factors explaining rates of pay. Both appeared to be factors in fee rates for organisational work, and both echo wider economic disparities in society.

While this is interesting, we would caution readers in over interpreting the results. In this study we were unable to control for factors such as years of experience, age, hours of training or qualifications, which may all be factors influencing the results in this specific sample. But given that this is the only data published on race or gender and their concordance with income disparities, this data is worrying and suggests a need for further research to better understand these differences.



Figure 11: Average fee rates (US\$) per hour – Individual paying clients

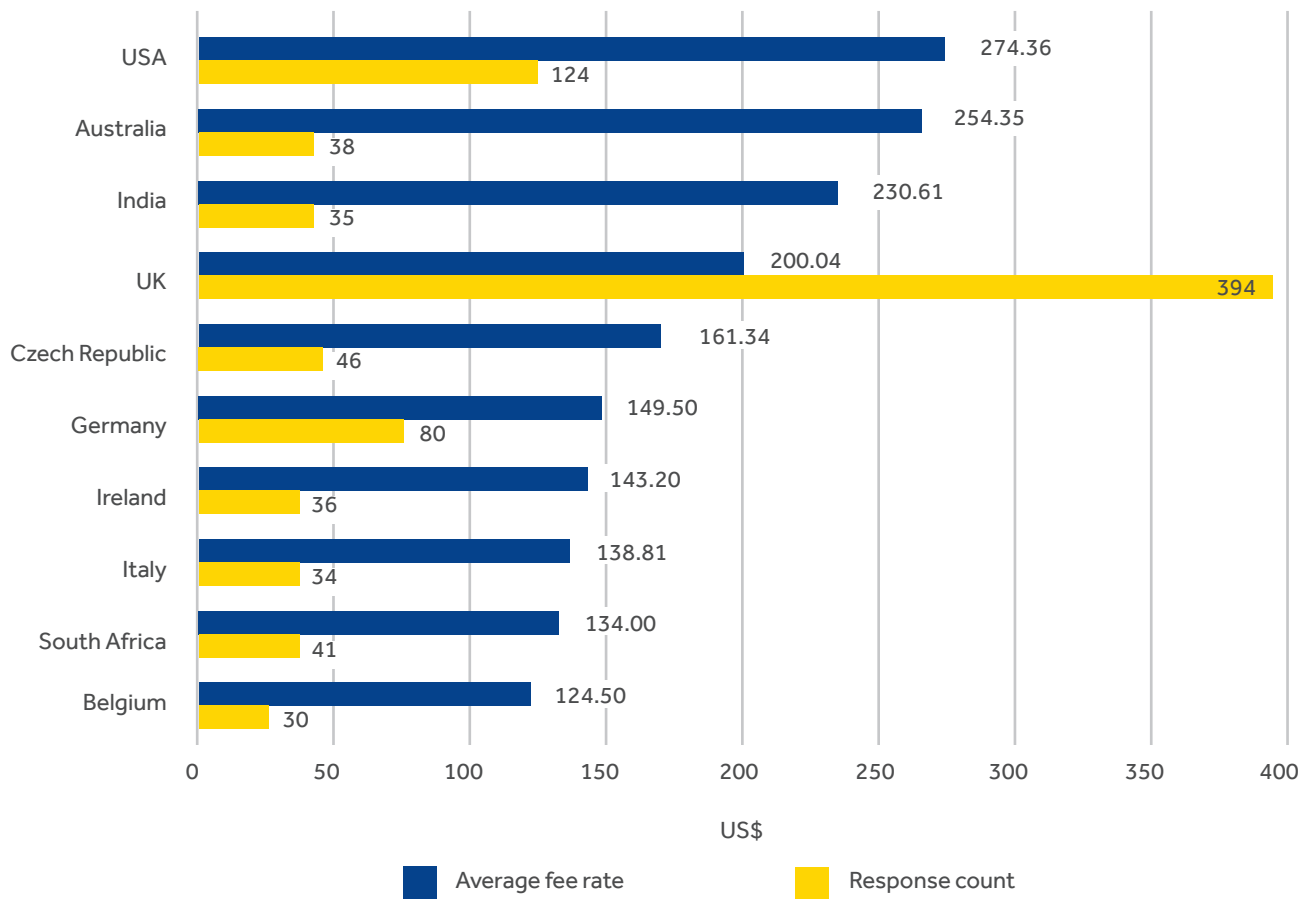


Figure 12: Average fee rates (US\$) per hour – Organisational paying clients

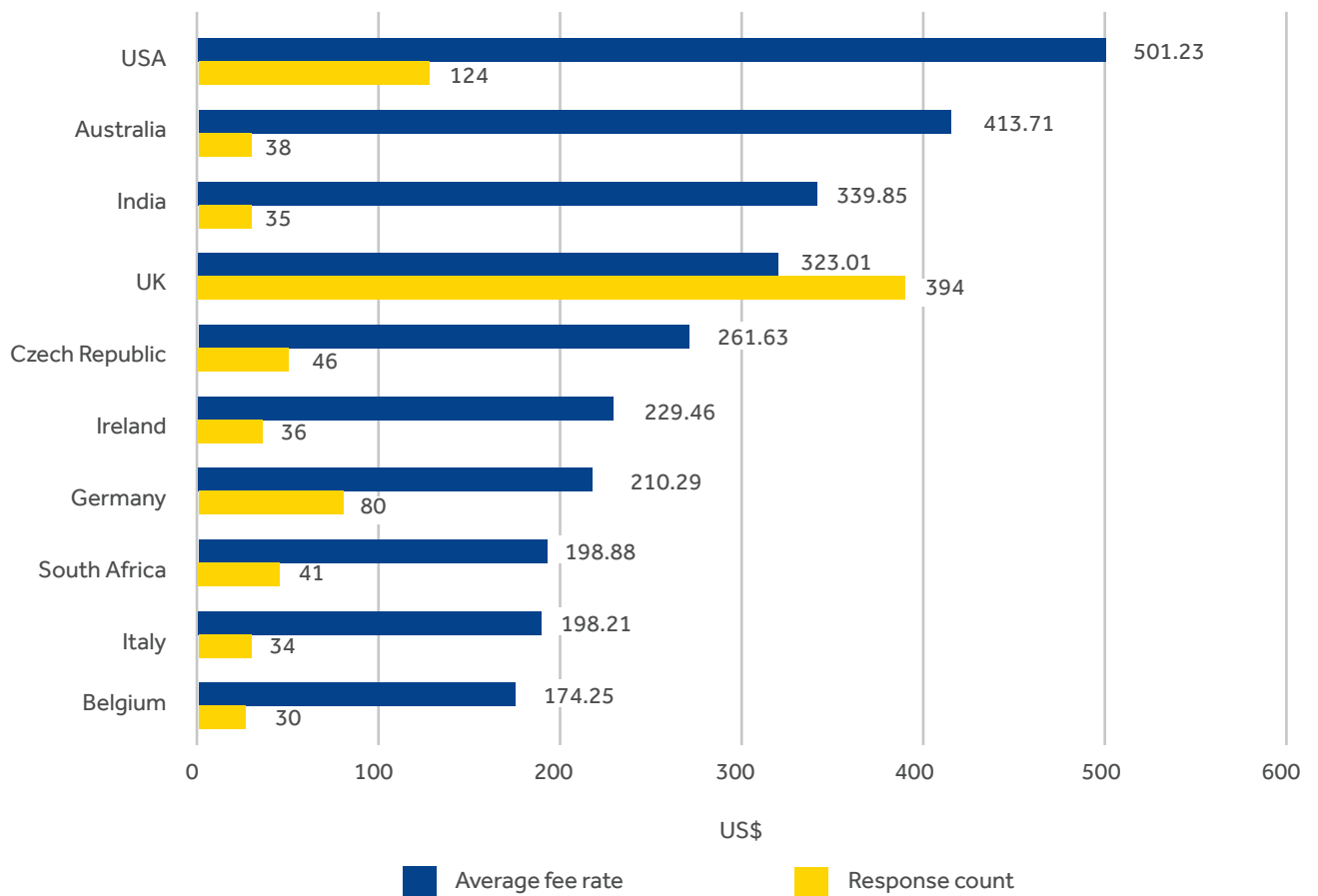


Figure 13: Average fee rates (US\$) per hour

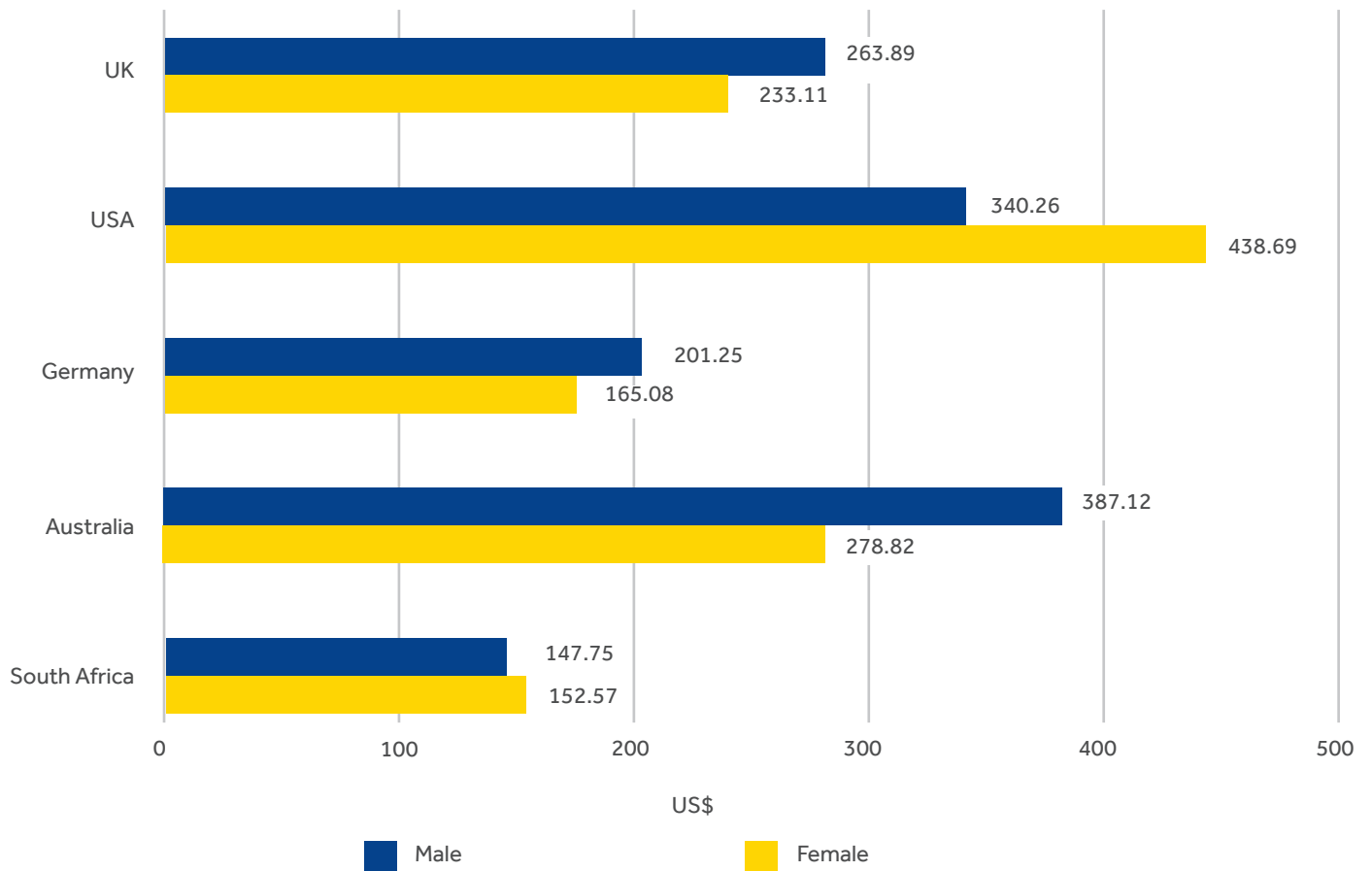
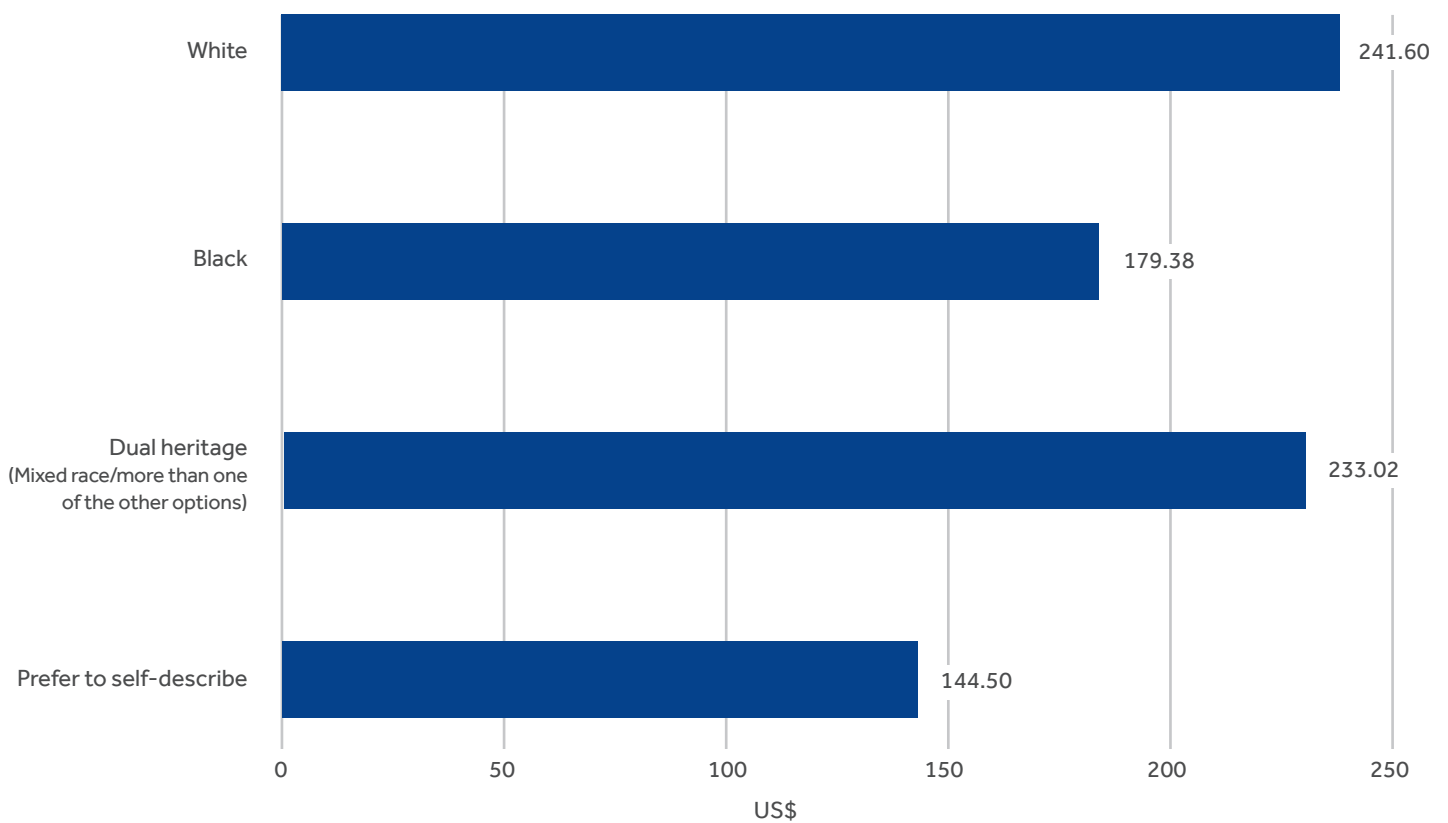


Figure 14: Average fee based on race



Coaching modalities

Given the global pandemic, it was not surprising to see that 98.3% of coaches had used online coaching during the 2019–21 period. The trend across the period shows that the pandemic has sped up the transition to online in the post-2021 period, with some 43% of coaches expecting to undertake 80% or more of their coaching online. The preferred platform for coaches was Zoom, with 83.3% of coaches preferring it, while around 10% of coaches were using supplementary tools such as Menti, Jamboard, Miro or Mural. We predict that these tools will become more commonplace as coaches develop their confidence and understanding of online coaching and look to enhance the client experience.

In thinking about the pros and cons of this move to online, the three key client benefits identified were: 'convenience', a 'safer personal space' and 'cost reduction' for individuals and organisations. In terms of the downsides, just under half the coaches suggested clients 'preferred to meet face to face' and around a third felt clients were 'more likely to be distracted online' than face to face. A further third thought there were no downsides.

This division of more benefits or upsides to online coaching compared with the downsides was repeated when coaches thought about how it impacted on them. The key three benefits were: 'less travel', 'better use of time' and allowing 'more client work'. In contrast, downsides were again mainly only identified by around a third of coaches and included a perception that

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The general trend towards online working has been accelerated by the pandemic; most clients and coaches now favour it
.....

online was 'less intimate', 'harder to build relationships' and 'less enjoyable'. Meanwhile, just over 25% of coaches thought there were no downsides.

When asked for their preferred mode of delivery in the future, 85% of coaches expressed a preference to coach online, while 83% stated their clients would prefer the online mode.

We have observed a general trend over the past five years towards online working, but the Covid-19 pandemic has accelerated that trend, meaning that most clients and coaches now favour online working for the saving it offers in convenience, personal safety and cost reduction.

Given this, we expect online coaching to remain as the primary mode of delivery post-pandemic (2022 onwards), although how coaches use this may change as the level of skills improve and as coach training programmes adapt to provide specific training in using online modalities.

Figure 15: Coaching modalities 2019–21

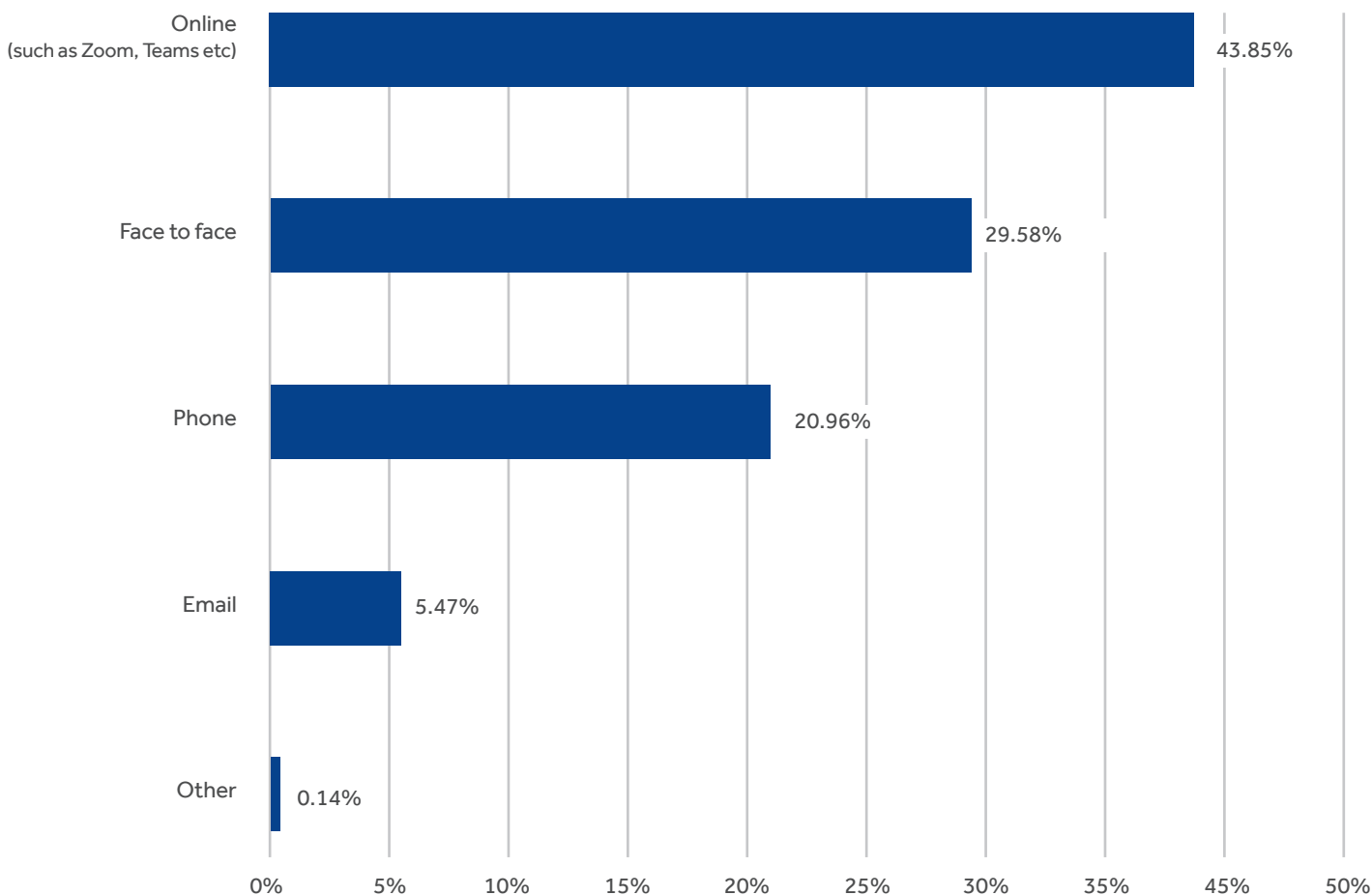


Figure 16: Online platforms for one-to-one coaching

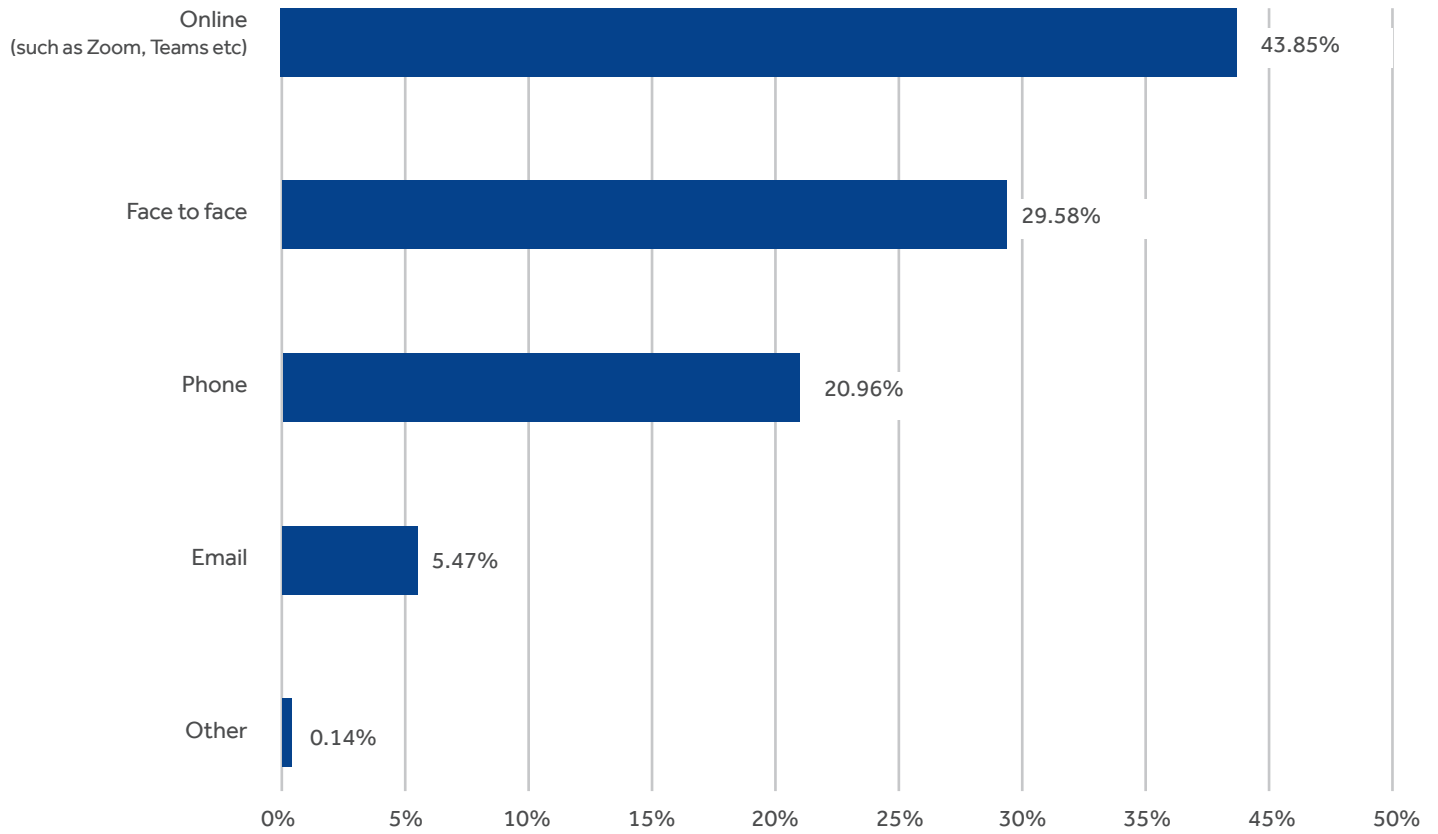


Figure 17: Online tools for one-to-one coaching

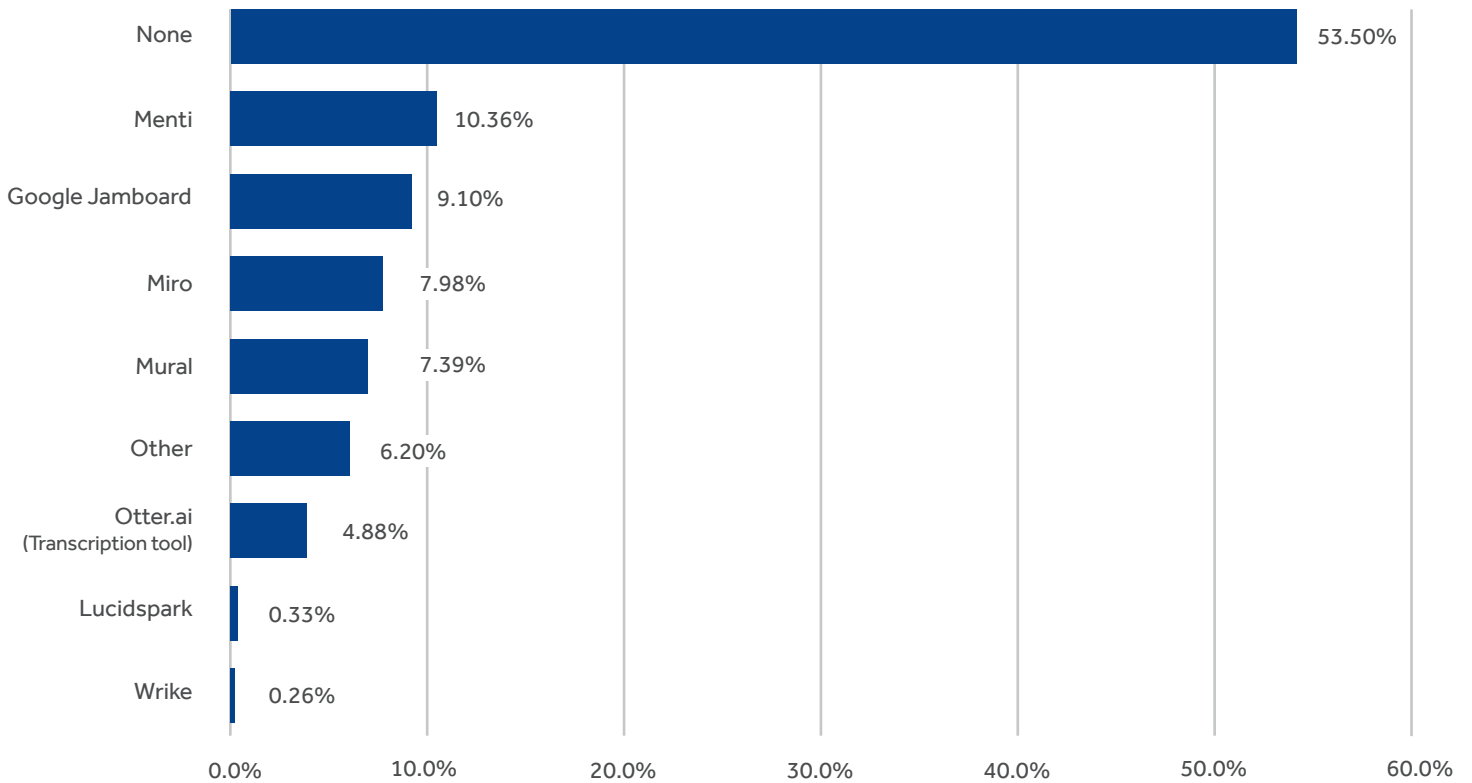


Figure 18: Benefits of online for clients

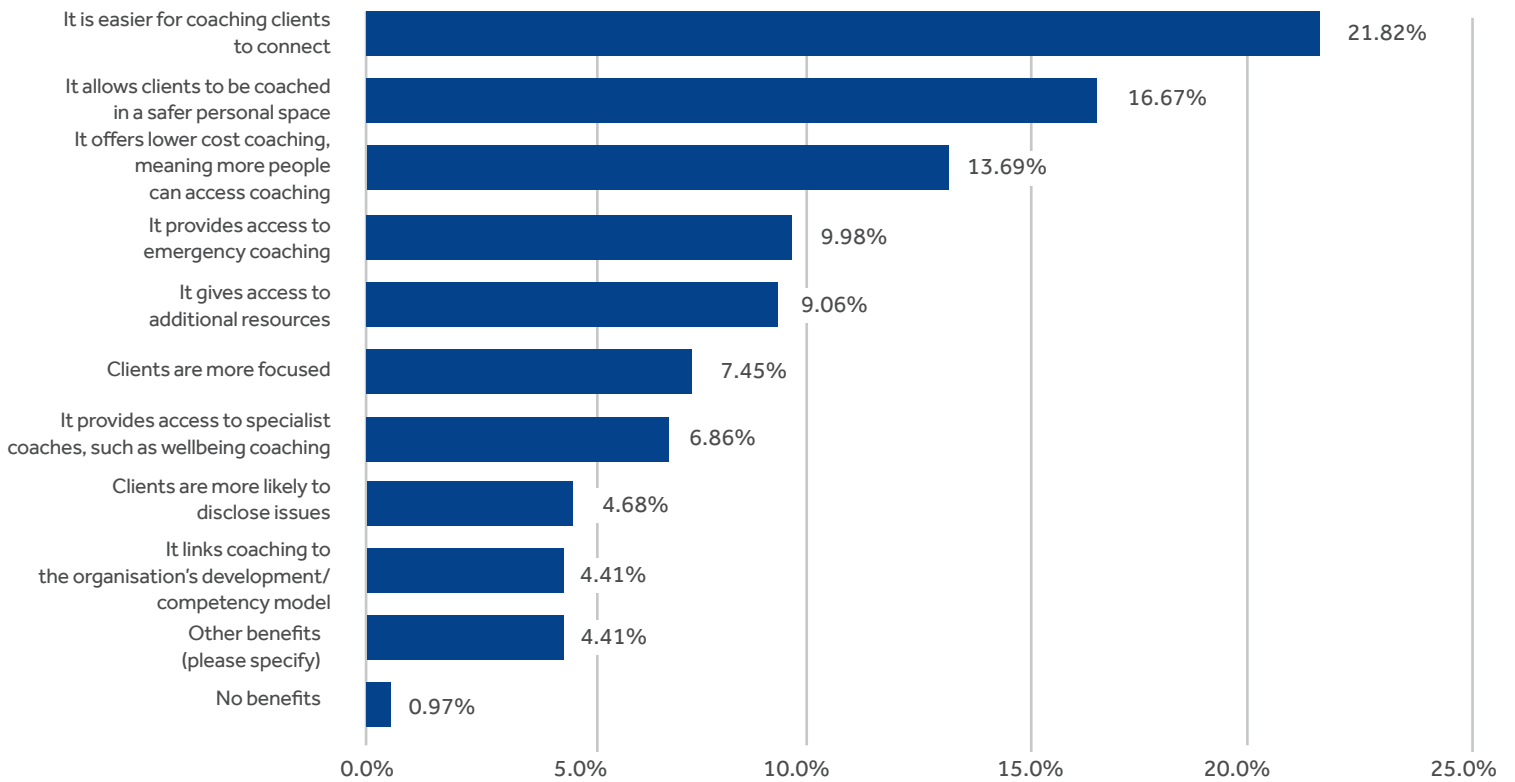


Figure 19: Downsides of online for clients

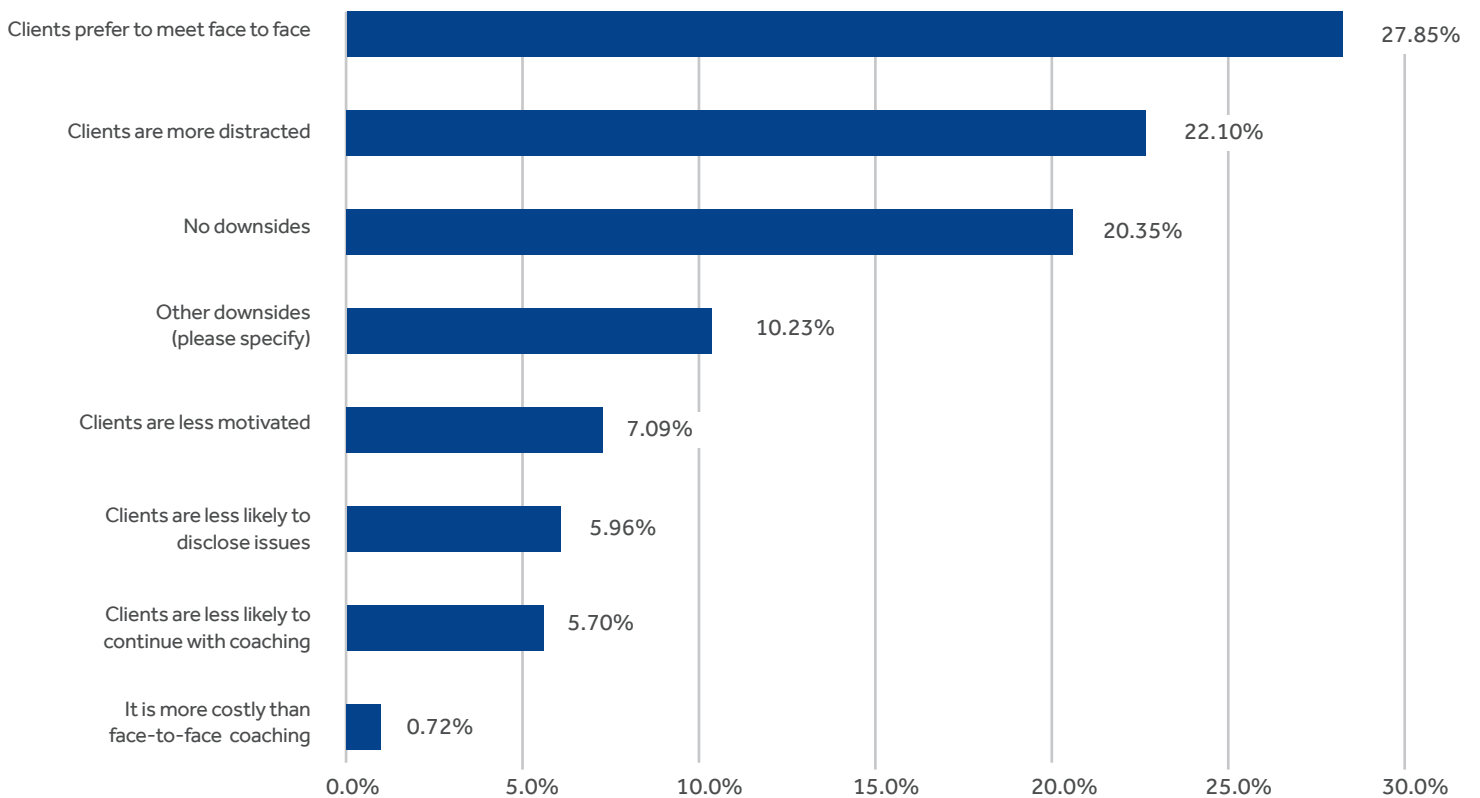


Figure 20: Benefits of online for coaches

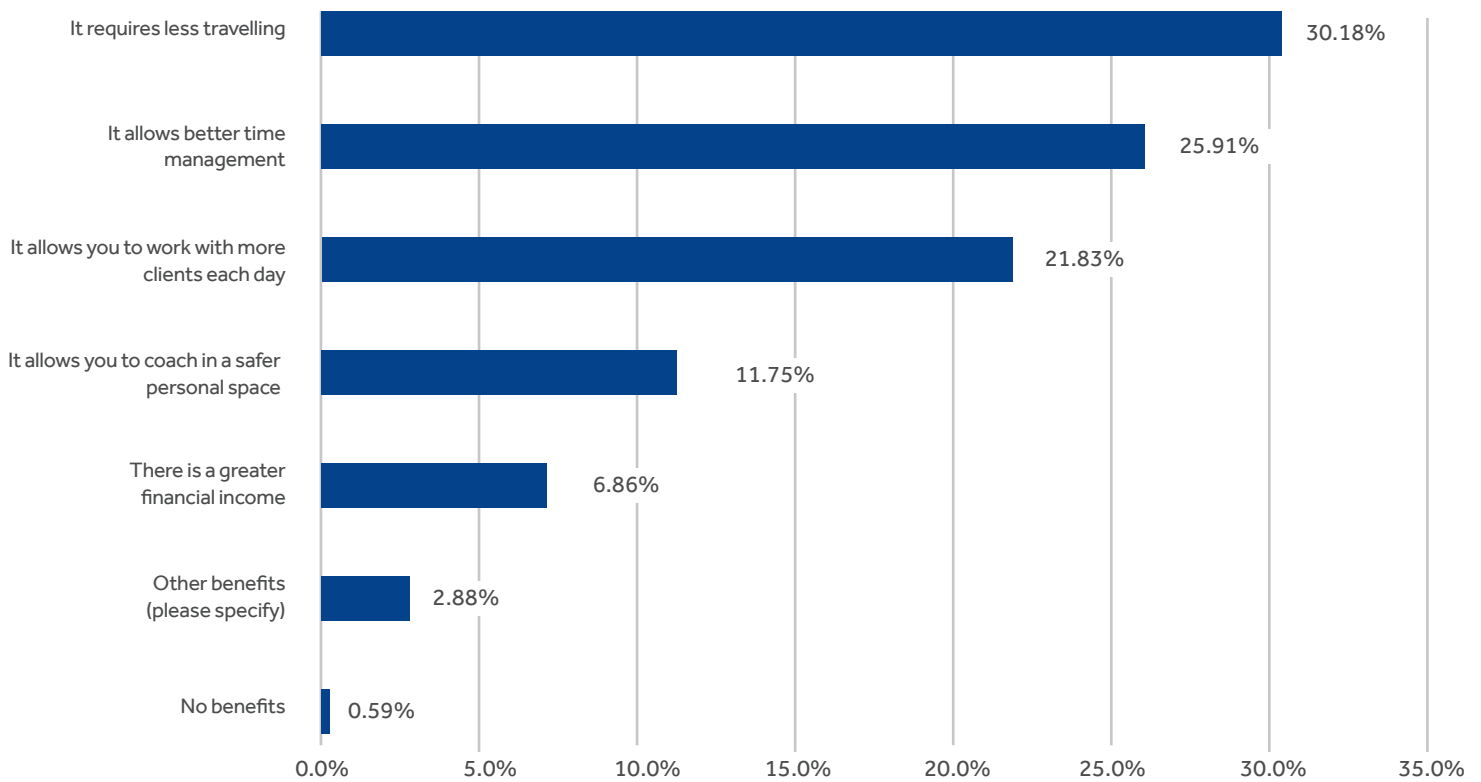


Figure 21: Downsides of online for coaches

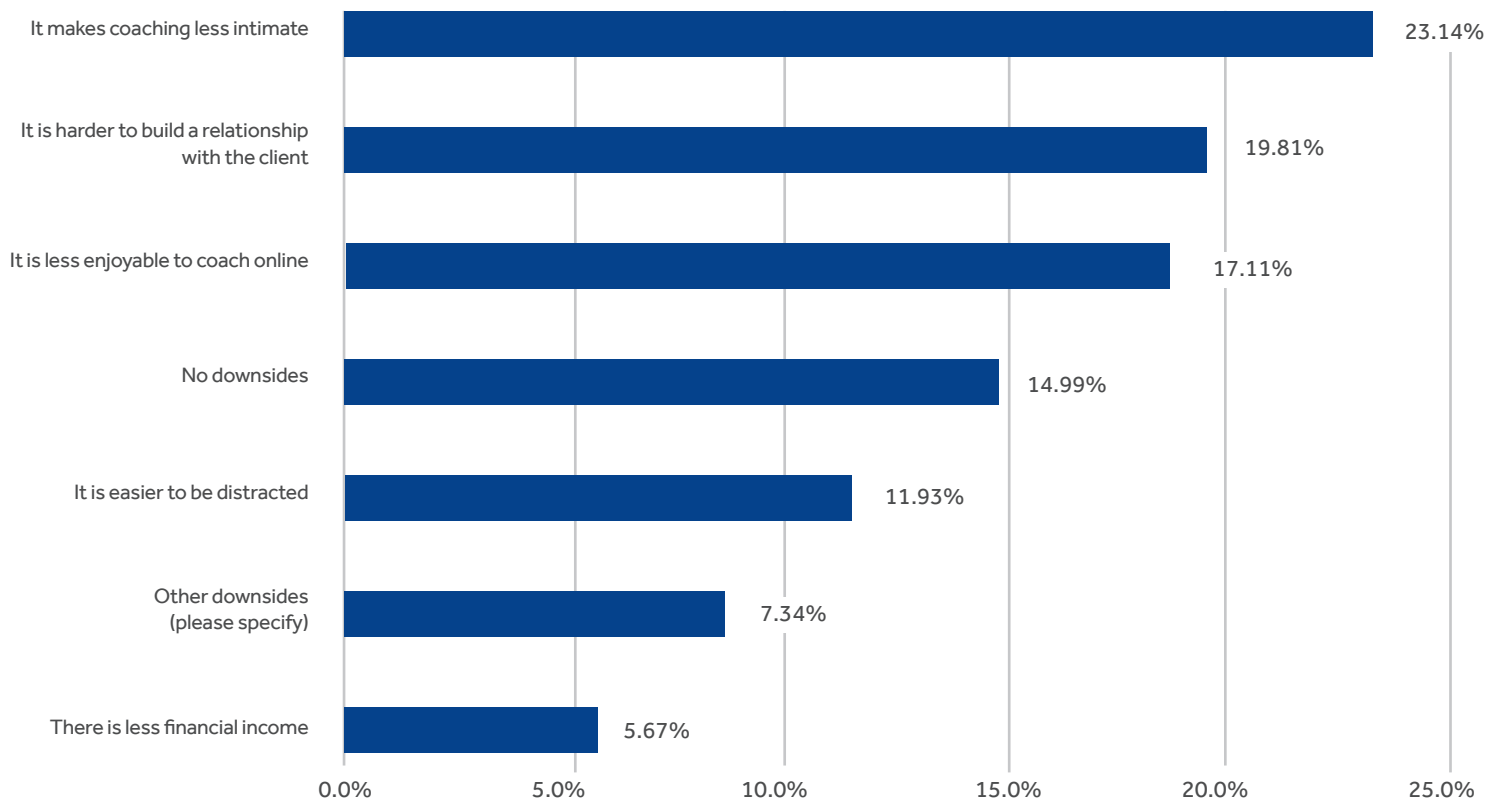
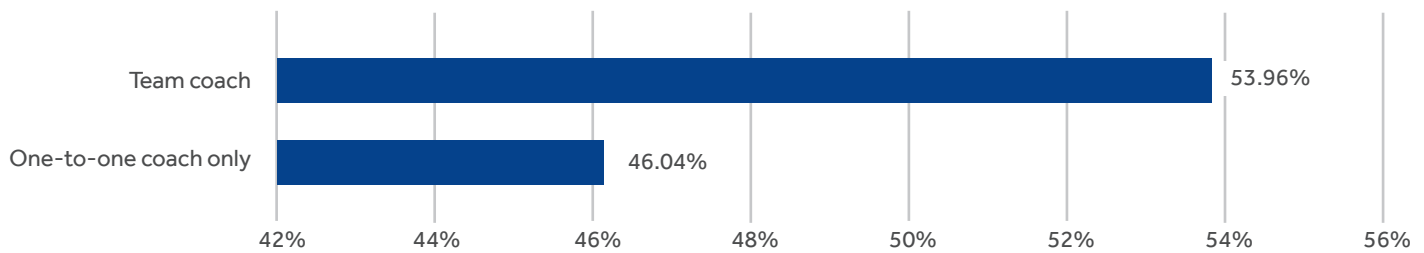


Figure 22: Coaches working on team coaching assignments



Section 4: Team coaching

Just over half of respondents were providing team coaching. Of this group, the evidence was that face to face was a preferred option, with 93% choosing this mode of delivery. This contrasts with the responses for personal coaching, where digital coaching has become the preferred mode. However, we wondered whether, for teams who are widely geographically dispersed (for example on different continents), online team coaching would be a preferred option over the costs (financial and environmental) of travelling to a distant physical location. Views on this issue may continue to change as greater focus is placed on the environmental costs of travel.

We also asked about hourly rates for team coaching. These ranged from US\$35 to US\$1,244, with a global average of US\$398. In all cases, coaches undertaking team working were being funded by organisations. This contrasts with the rate variation found in one-to-one coaching, and between personal funded and organisationally funded assignments.

There has been a movement over the period 2019–21 towards the introduction of team coaching accreditation. As of September 2021, two of the global coaching bodies offered team coaching standards: EMCC and ICF. Professional bodies have been

responding to the growth in team coaching by accrediting team coaching programmes and offering routes to individual accreditation.

In this study, to our surprise, 47% of coaches expressed the view that there was no need for additional accreditation. This may signal a frustration about the need for further training or a belief that many of the skills employed by coaches in their one-to-one work can be transferred directly to team working. Further research is needed to better understand the views of coaches. If professional bodies are to be successful in marketing their new accreditation standards, more work is needed to explain the benefits of team competences and team coach accreditation.

For team coaches, the majority of respondents (63.7%) believed working in pairs was more effective than working as a single coach with a team. This view is supported by wider work in the field, and again emphasises the complexity of working with a team as opposed to an individual (Widdowson & Barbour, 2020).

While there was a reluctance to engage in further accredited coach training, there was a view expressed by 82.6% of respondents that team coaching was a growth area of practice. We see team coaching continuing to grow over the next five years to become a common feature of coaching.

Figure 23: Coaching modes in team coaching assignments

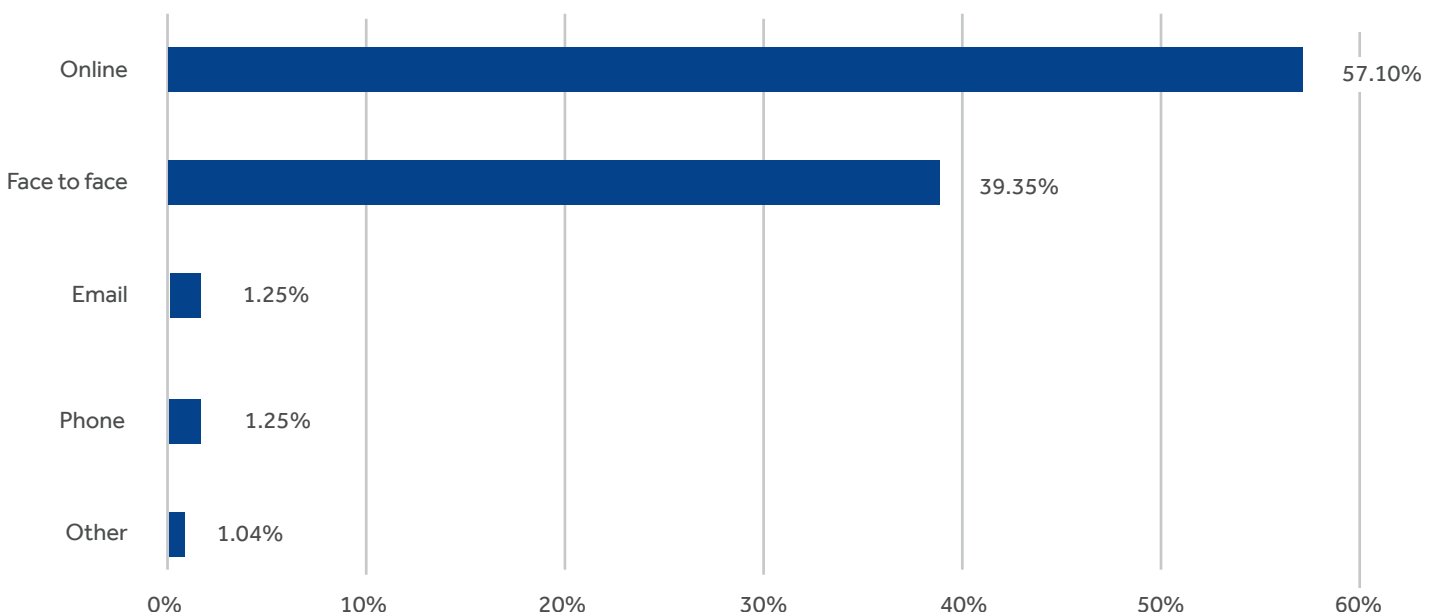


Figure 24: Average hourly fee rates for team coaching (US\$)

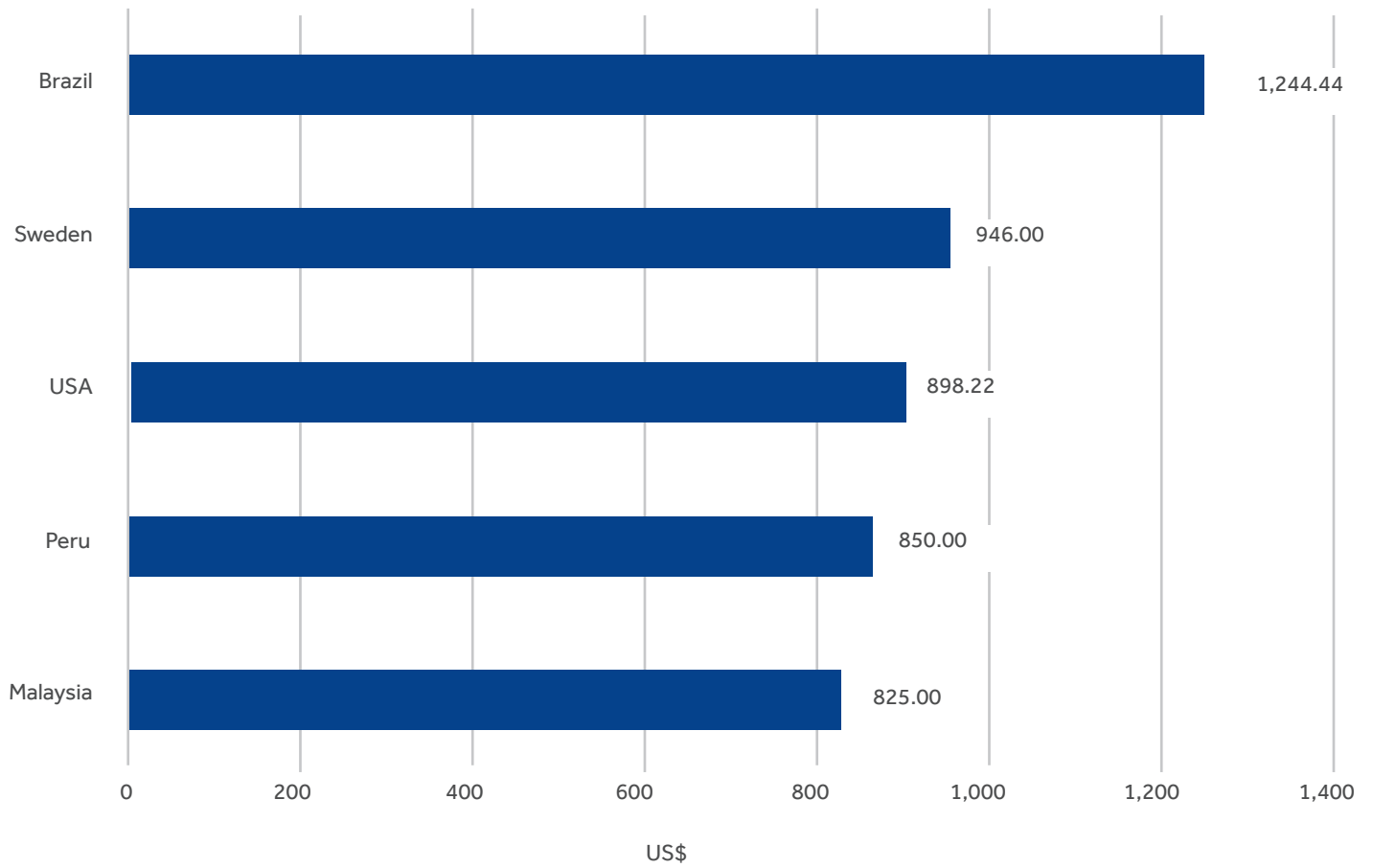
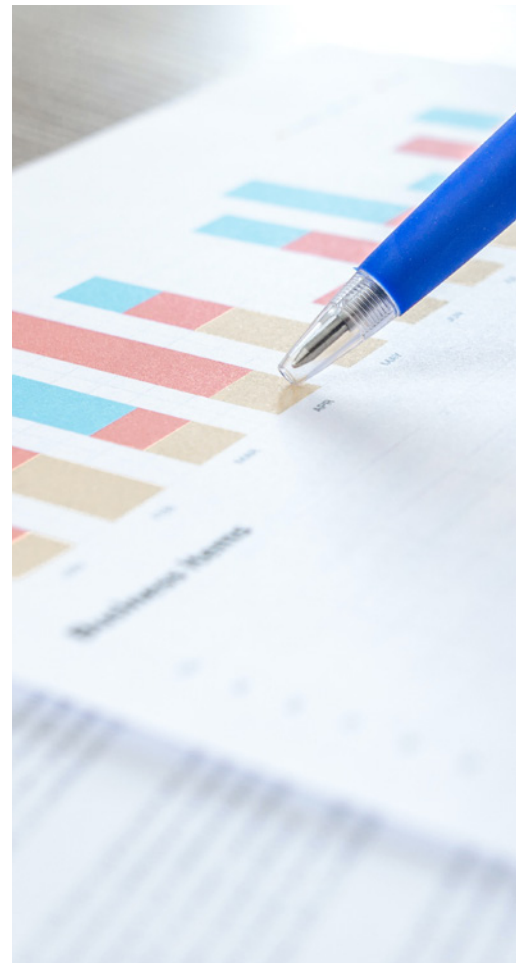
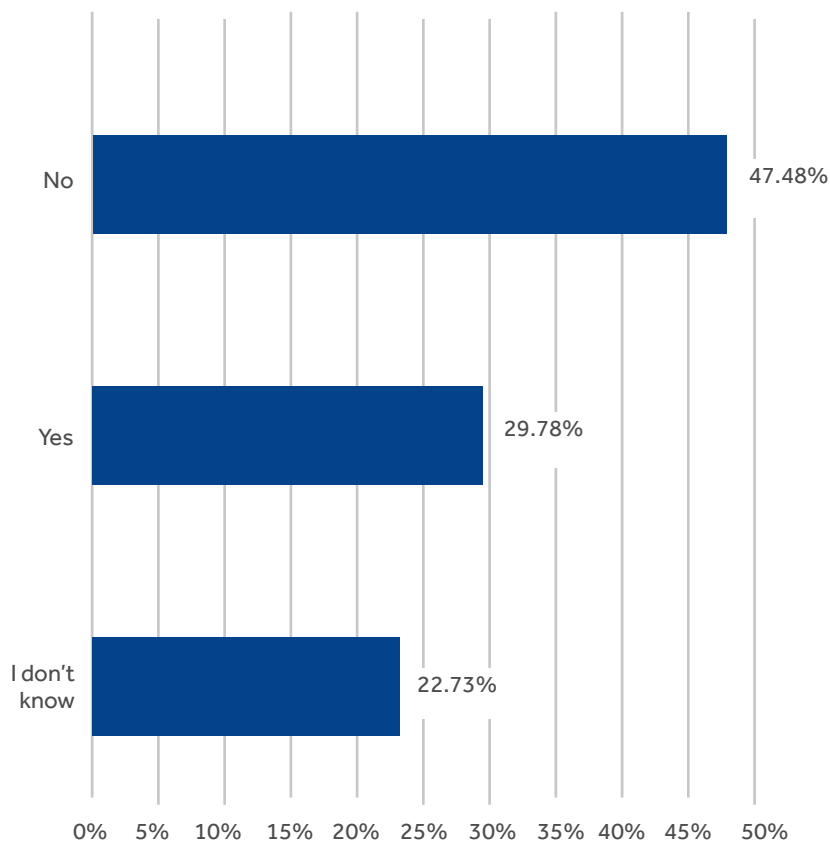


Figure 25: Accreditation for team coaching



Section 5: Future trends

In this section coaches were invited to express their view as to whether and how strongly they agreed with a statement, with the options: 'Strongly agree' (5), 'Agree' (4), 'Neither agree nor disagree' (3), 'Disagree' (2) or 'Strongly disagree' (1).

The trend data provided some interesting perspectives; possibly what is of most interest is the comparison between ratings. While there were mixed views on the role of artificial intelligence (AI), coaches who participated in this study were equally divided as to whether it would be a benefit or a disbenefit for coaching (with an averaged rating of 3.2), with African coaches (3.5) marginally more positive than North American coaches (3.1). This was also true about the role of coaches in addressing climate change, with African coaches marginally keener for coaches to play a role (3.7) and North American coaches less inclined to be so (3.1).

Other statements led to strong views: Nearly 9 out of 10 coaches (85.2%) 'agreed' (4) or 'strongly agreed' (5) that organisational clients will expect more coaching to be delivered online, and two thirds of coaches (67.2%) believed organisational clients would increasingly look to online coaching platforms for delivering coaching. Nearly 9 out of 10 coaches (85.8%) thought coaching should be better informed by research, with a sizable 96.4% of coaches expressing the view from their practice that coaching can help clients improve their wellbeing.

We have provided averages from the global data and contrasted the global average with responses from three regions to compare how views varied across the world.

Figure 26: Future trends

Statement	Global average rating	Africa average	Europe average	North America average
	Rating out of 5			
From my experience, during Covid-19, coaching can help improve a client's wellbeing.	4.7	4.8	4.7	4.8
Team coaching is a growth area for organisational clients.	4.3	4.6	4.3	4.5
Organisational clients will expect more online coaching using software like Zoom and Teams.	4.3	4.5	4.3	4.5
Organisational clients will look to online coaching platforms as a mechanism for delivering large coaching projects.	4	4.2	3.9	4.2
Organisational clients will expect coaches to engage in regular supervision.	3.7	3.7	3.8	3.3
Organisational clients will expect their coaches to have a coach accreditation from a professional body.	4.2	4.2	4.2	4.0
Coaching should aim to be on a par with other professions such as therapy and accounting in terms of the standards of professional training.	4.4	4.6	4.4	4.4
Coaching should be better informed by research.	4.4	4.4	4.4	4.3
Regular supervision is essential for professional coaches.	4.4	4.4	4.5	3.9
The coaching profession should aim to become more inclusive and diverse.	4.3	4.3	4.2	4.2
I believe coaches have a role to play in addressing diversity and inclusion at work.	4.3	4.6	4.3	4.3
I believe coaches have a role to play in addressing climate change.	3.5	3.7	3.5	3.2
I believe using AI will have a positive impact on coaching for clients.	3.2	3.5	3.1	3.1

Conclusions

This brief snap-shot survey provides an interesting insight about the changing role of coaching during what is likely to emerge as a pivotal point in the development of coaching.

While team coaching had been discussed prior to 2020, the data suggests engagement is growing. Coaches are sceptical about the need for further accredited training, but they appear to recognise the complexity of working with teams and choose to manage this by working in pairs.

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The biggest message was the continued migration to online coaching provision; Covid-19 has accelerated this
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The biggest message was the continued migration to online coaching provision. If this has been a trend for the past five years, Covid-19 has accelerated this migration. Most coaches now have experience of using platforms such as Zoom and most prefer this way of working, believing their clients prefer this way of working too. Interestingly, coaches are making relatively limited use of digital collaboration tools, such as Mural or Miro. This may suggest coaches are inexperienced with such tools and that as competence grows, so will their use.

Finally, there is scepticism about the potential of AI to bring added value to the coaching process and a question mark about the role of coaches in addressing the climate emergency. What is clear, however, is that both AI and the climate will impact on clients, organisations and thus the coaching community over the next two decades. The next question is how can coaches leverage AI to enhance their work, and how can they help their clients to navigate the challenges that the changing nature of the global climate will bring. To more confidently respond, we suggest coach trainers and professional bodies provide more information to enable coaches to better understand these issues and how they can engage with clients on these topics.

With over 1000 coaches worldwide sharing their views, we hope the research findings in this study – from fee rates to the impact of Covid-19, team coaching and online – prove helpful as you plan your next steps in coaching as a professional coach, client or coaching commissioner.



Henley Centre for Coaching

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

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

The Centre provides continuous professional development for coaching professionals through masterclasses, webinars, conferences, and via online access to journals, ebooks and coaching research. These are all delivered through our online learning platform, meaning coaches can connect from anywhere in the world to engage in professional development.

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

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



Jonathan Passmore

Jonathan is Professor of Coaching and Behavioural Change and Director of the Henley Centre for Coaching. He has authored over 100 scientific papers and 30 books on coaching, leadership and change.

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Henley Business School

For more information, please contact:

coaching@henley.ac.uk

Henley Business School
Greenlands
Henley-on-Thames
Oxfordshire
RG9 3AU

henley.ac.uk/coachingcentre

Our coaching programmes are variously accredited.

