5th COACHING SURVEY

An Asia Coaching Benchmark 2019

Geography Report – Philippines

Participating Markets:
Hong Kong, India, Indonesia, Mainland China, Philippines, Singapore

Edition 1.1, April 2020 release

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- The figures presented in this report are based on survey responses and therefore rely on the accuracy of the data provided by the survey respondents. In some cases, the sample size is small and may not reflect the true picture, however, it is still interesting to see what data brings out.
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Acknowledgement of Survey participants, Sponsors, Partners and the Team

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This Integrated Report is a result of several hundred hours of individual and collective effort writing, reviewing and editing by team members who analysed the data and wrote the reports.

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1
Introduction, Methodology, & Purpose

1.1 Purpose and Approach

The 5th Survey…

- The purpose of this coaching survey is to establish baselines of the coaching industry in Asian markets and track its development over time to identify trends and new insights to support the advancement of this relatively new profession.
- This survey collects information on coaching practice, process, outcome and demographics from both buyers (primarily companies) and providers (internal/external coaches) of coaching services with the aim of getting the full story from both sides. The approach blends both qualitative and quantitative methods to reach a comprehensive and diverse pool of stakeholders.
- The coaching survey was conducted in English, Chinese, and Bahasa Indonesia languages.
- Previous four coaching studies have been completed in 2010, 2012, 2014, and 2017 respectively. First three studies were done in Mainland China. The fouth one covered Mainland China, Hong Kong and India. Indonesia, Philippines and Singapore were added in the fifth benchmark study completed in 2019
- It is our aim to include other Asian markets in future studies.

1.2 Methodology

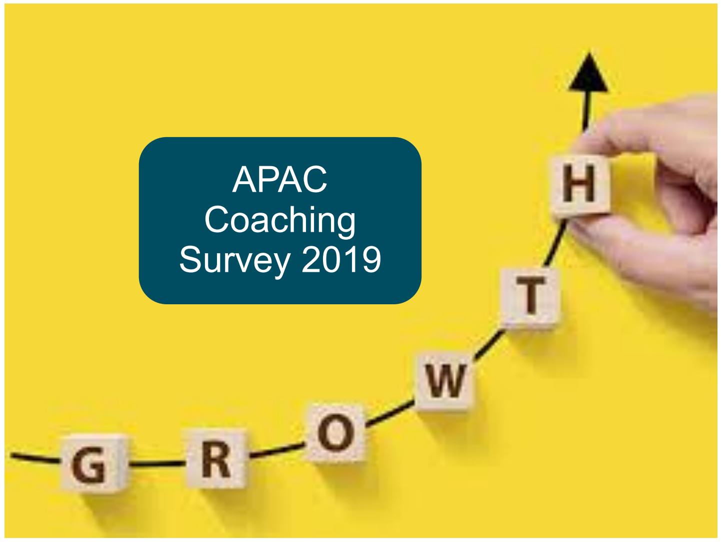
Detailed & Robust

- **Medium:** Online Questionnaire (143 questions)
- **Distribution channels:** Sponsors, Networks, & Social media
- **Time Frame:** Feb 2019 to April 2019
- **Survey Participating groups:** Companies | External Coaches | Internal Coaches
- **Markets:** Hong Kong, India, Indonesia, Mainland China, Philippines, Singapore
- **Languages:** English, Mandarin, & Bahasa Indonesia
- **Analysis:** Comprehensive and by Markets

Comprehensive Coverage from all three perspectives

CR **Company/ Organization Representative**	A company/organization representative ideally works in the field of HRM/HRD or is a senior member of the leadership team who is privy to the coaching interventions in the company/organization.
EC **External Coach**	An external coach offers coaching services to companies and/or individuals. He/She is either self-employed or works as a contract worker for coaching providers.
IC **Internal Coach**	An internal coach is an employee who has the job task to coach fellow employees (making up at least 20% of the job). Coaching of employees for whom the coach is an immediate supervisor does not count.

1.3 Survey Progress



	2010	2012	2014	2017	2019
Markets	1	1	1	3	6
Languages	1	1	1	1	3
Total Participants	81	146	369	554	1,286
Organizations	43	55	71	168	427
External Coaches	38	68	113	321	703
Internal Coaches	NA	23	35	65	156

Progress over the years

More than 100% growth in participation in 2019 over 2017

1.4 Thank You Sponsors

Thank you Sponsors

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ICF Mumbai

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ICF Singapore

1.5 Top Insights and Trends

1. Growth in Coaching Services - a deeper penetration in markets

Coaching services are being widely adopted in all markets and companies are increasingly becoming more open to introducing coaching services. Our survey revealed that only 2% of the companies are UNLIKELY to introduce coaching as compared to 13% of the companies in the 2017 survey. Some of the other trends are:

- **New markets:** Deeper penetration in the market is indicated as start-ups/entrepreneurs, NGO sector and educational institutions emerge as new areas for coaches to focus on.

- **Emergence of creative applications of coaching:** Creative applications of coaching are becoming more prevalent and we see the emergence of new niche specializations - spirituality, cross-culture, maternity etc.

- **Coaching opening up to all levels:** Companies are increasingly providing coaching to middle managers, high potentials, junior managers and even management trainees. This growth points to the efficacy, benefits and value-addition of coaching in human focused development over time. However, the survey points out that bulk of coaching still happens at the senior levels.

- **Training on Coaching skills on the rise:** On an average 1 in 5 companies reported that they offer ‘Training on Coaching Skills’ intervention across all management levels.

- **Demand of local language on the rise:** Demand for coaching in the local language is on the rise across markets. 74% ICs say they use local language for coaching while 57% ECs coach in the local language. There may be an increase in opportunities for coaches who can speak the local language.

1.5 Top Insights and Trends

- **External Coaching or Internal - Majority of companies are using a combination of ECs and ICs**

While companies are increasingly using a combination of ECs and ICs, there is a variance in the perception of the role and efficacy of internal coaches.

- **More companies are using a combination of ECs and ICs:** 69% companies use ECs and ICs to a varying range, 23% of companies engage only ECs to meet their coaching needs, while 8% of the companies are almost fully dependent on ICs.
- **Confidentiality and neutrality concerns with ICs:** While Companies find ICs more cost effective (82%) and providing better ROI (64%) than ECs, they point to confidentiality & neutrality (65%) and the level of trust (57%) issues with ICs.
- **Profile of EC and IC:** Survey indicated that on an average, ECs are older in age, they have more overall work experience as well as coaching experience. ECs are spending more time in the professional skill development (138 hours) as compared to IC (85 hours). Larger number of ECs than ICs are members of professional bodies and are credentialed. However, 37% ICs and 16% ECs do not have formal credentials from any professional body.

3. General concern about IC's role not being well defined

Survey points out that while companies want to create internal capability for coaching, almost half of the them say that IC's coaching role is less than 25% of their overall job responsibility. There is an opportunity for IC's role to evolve and become more specialized.

This could mean that companies may want to assign resources to work on the job description, deliverables, rewards, tools and support and quality control for internal coaching. This could also be an opportunity for ECs and coaching companies to understand their role dynamics and efficacy vis-à-vis company needs, create alignment and design products to help companies.

1.5 Top Insights and Trends

4. ECs are investing more in professional development with coaching supervision gaining more attention

Formal coaching supervision, although a very new field, is being used by coaches (32% ECs and 26% ICs). Coaches are also using other forms of reflective practices like mentor coaching, peer network learning etc. to enhance their quality of coaching.

While all coaches are leveraging multiple forms of professional development, ECs are more invested in professional development. Nearly double the number of ECs (41%) than ICs (23%) spend 60 hours per annum or more on continuous professional development.

However, this may point to a need to distinguish the value of formal Supervision from that of Mentor Coaching and Peer Network learning and to ensure that it enhances the quality of coaching.

5. Influence of Culture in understanding of Coaching in Asia

The survey reconfirmed the observation from the 4th Coaching Survey that coaching is perceived differently in Asia. Both companies and coaches acknowledge that while coaching is primarily facilitating self help, there are elements of guidance, sharing expertise and problem-solving involved in coaching. This comes out stronger from companies.

This may possibly be linked with the inherent cultural values of the region, also referred to as high power distance according to Hofstede's cultural dimension. The question is how can we honor the unique identity and cultural values and create a unique blend of coaching that may be relevant to Asia Pacific?

1.5 Top Insights and Trends

6. Affirmation of coaching impact and growing sophistication in consumer expectations

- **Coaching quality:** While 6 out of 10 companies expressed their satisfaction with the coaching services rating it very good/good, 3 out of 10 respondents were undecided on quality of coaching. 7% of the respondents were not happy with the quality of coaching services. This trend remains the same compared to 2017 survey.

- **Coaching benefits:** 84% of respondent companies see some impact of coaching on their business bottom line. Coaching seems to have a strong positive impact on individual performance and employee morale/engagement while organization performance, employee retention, revenue and profitability received a moderate positive impact. Only 16% reported no impact on the bottom line.

- Another interesting fact emerging from the survey is that while 40% of the companies have not received the specific benefits they sought from coaching; 40% received the benefits they did not seek. 20% companies received the coaching benefits they sought from coaching.

  This may imply that there is a strong need to make coaching and its benefits sharply defined and known as this is the number one reason that is stopping the companies from using coaching services.

- **Effectiveness of coaching process:** Organisations unanimously expected the coaching process to improve. The top three areas for improvement being - clarity of coaching objectives, coachees' understanding of coaching and review of feedback at the end of coaching assignment. This remains the same top three areas as in 2017 survey data.

contd. on next page

1.5 Top Insights and Trends

6. Affirmation of coaching impact and growing sophistication in consumer expectations contd..

- **Fluid 'boundaries' of coaching process setup**: Majority of companies and coaches indicated that while there are joint agreements on coaching objectives, confidentiality arrangements and updates on the coaching progress from companies, they also request for coachees' assessment results and specific coaching content from the coaches.

- **Credentialing of new coaches:** Coaching experience is still ranked as the most important selection criteria for coaches, followed by chemistry, language and credentials (in no particular order).

  The request of credentials may apply more to new entrants than seasoned coaches who have been in the field for a longer time where their coaching experience may be seen as more important.

7. AI based coaching tools yet to be seen

While a majority of companies and coaches indicated openness to using some form of technology in the future, as per the survey, 88% EC and 85% IC are not currently using any AI tool.

It will be interesting to see how AI may penetrate some of the areas such as:

- *coach selection, coaching skills learning, coaching process management and actual coaching process*
- *meeting the needs of millennials and Gen Z*

1.5 Top Insights and Trends

8. Future Outlook is positive

Companies plan to increase overall focus on coaching: They plan to build in-house capability (95%), use technology (*78%), and increase the coaching budget (88%). While companies want to continue using external coaches, 97% say that they want to train their leaders to coach the team members and build a coaching culture in the company.

Coaches perceive a positive future outlook with increase in demand and supply of coaching offerings. ECs and ICs are predicting an increase in all types of coaching services – 1-1 Coaching, Team Coaching and Coaching Skills training.

With the increase in demand and supply, how will the future coaching market evolve? How do coaches deepen and broaden their skills and stay ahead of the competition?

In view of the Covid-19 pandemic, the use of technology and AI tools is likely to increase manifold and perhaps rapidly. The first version of the report was generated in January 2020.

2
Demographics

2.1 Overall Study: Participants Overview & Distribution

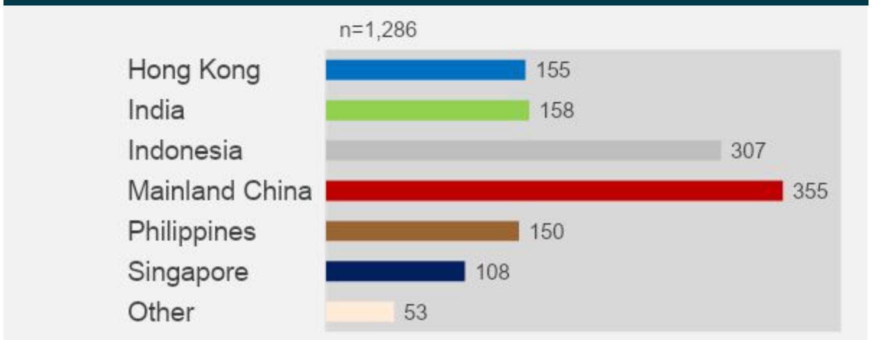
A total of 1286 valid responses were received in this survey. The highest number of respondents came from Mainland China (355) followed by Indonesia (307). There were 150 respondents from the Philippines.

Out of the total number of respondents, ECs attributed half the total respondents, CRs one third and ICs about 10%. Overall, there are more female respondents than male and 74% took the survey in English.

Markets	Hong Kong	155	*12%*
	India	158	*12%*
	Indonesia	307	*24%*
	Mainland China	355	*28%*
	Philippines	150	*12%*
	Singapore	108	*8%*
	Others	53	*4%*
	Total	**1,286**	***100%***
Role	External Coach	703	*55%*
	Organization Representative	427	*33%*
	Internal Coach	156	*12%*
	Total	**1,286**	***100%***
Gender Only (EC+IC)	Male	250	*42%*
	Female	349	*58%*
	Total	**599**	***100%***
Language used for survey	English	951	*74%*
	Mandarin	258	*20%*
	Bahasa Indonesia	77	*6%*
	Total	**1,286**	***100%***

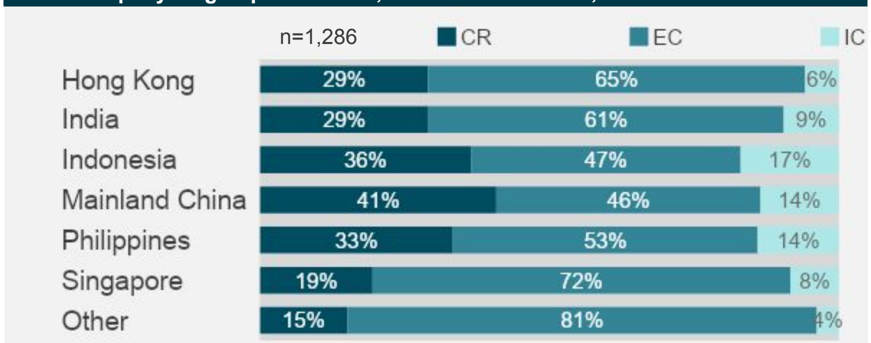
2.2 Overall Study: Participants' Overview & Distribution by Market

Markets

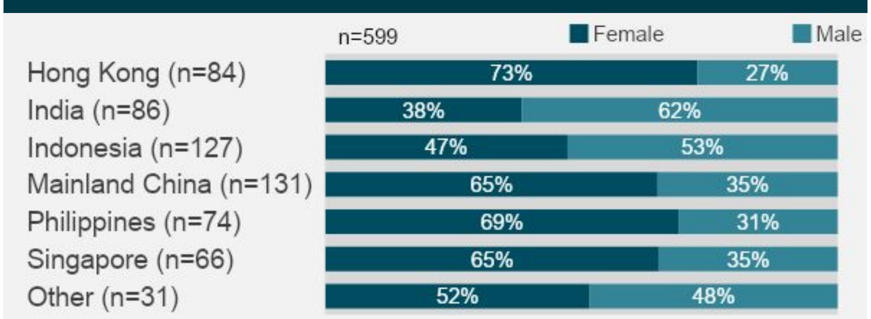


Role

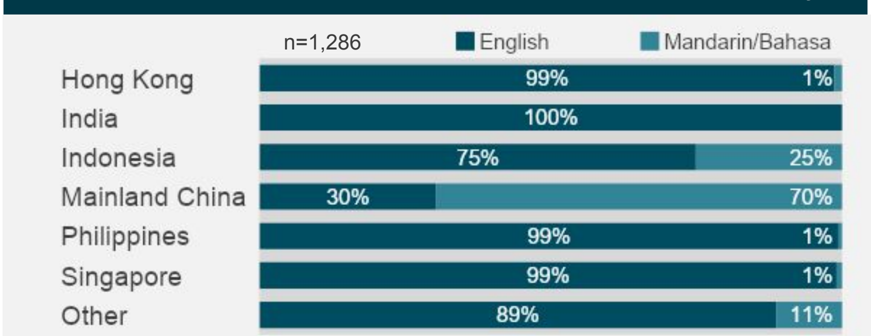
CR= Company/ Org Representative, EC= External Coach, IC= Internal Coach



Gender (EC & IC)



Language used for Survey



Across all markets, the number of IC respondents were relatively lower than ECs and CRs. Mainland China, Indonesia and the Philippines had a relatively wide spread of respondents from ECs and CRs while for Hong Kong, India and Singapore, the majority of respondents were from ECs.

The 150 respondents from the Philippines were comprised of 50 CRs (33%), 79 ECs (53%) and 21 ICs (14%). There were also more female respondents (69%) than male (31%).

Majority of participants responded to the survey in English. In the Philippines, 99% of the participants responded to the survey in English, while 70% respondents in Mainland China used Mandarin and 25% in Indonesia used Bahasa Indonesia.

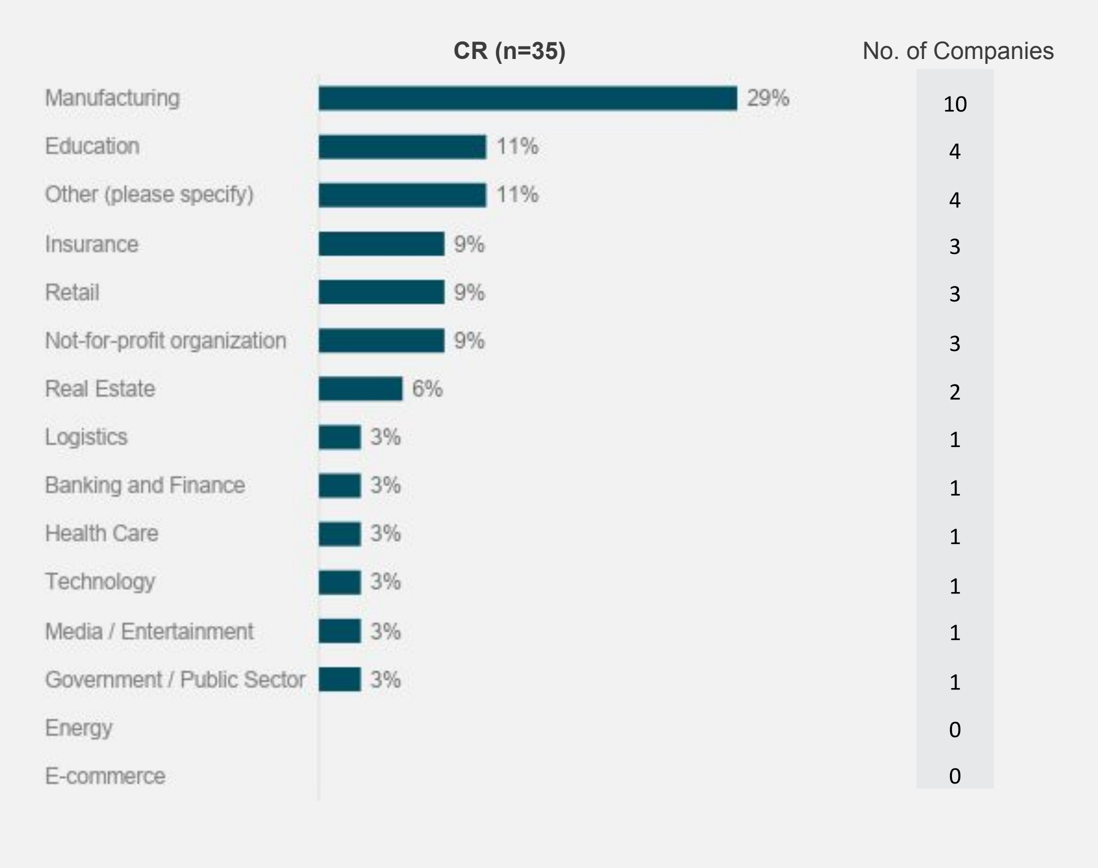
2.3 Participating Organizations — By Industry Sector and Type

Well diversified sample from multiple industry sectors

The survey reached a well diversified sample from a large number of industry sectors. The highest CR respondents came from Manufacturing (29%), Education (11%) and Other sectors (11%).

In the 2017 Survey done in Hong Kong, India, and Mainland China, the highest CR respondents came from Technology (13%), Retail (9%), and Banking & Finance (7%) sectors.

Q. What industry sector does your Organization operate in?



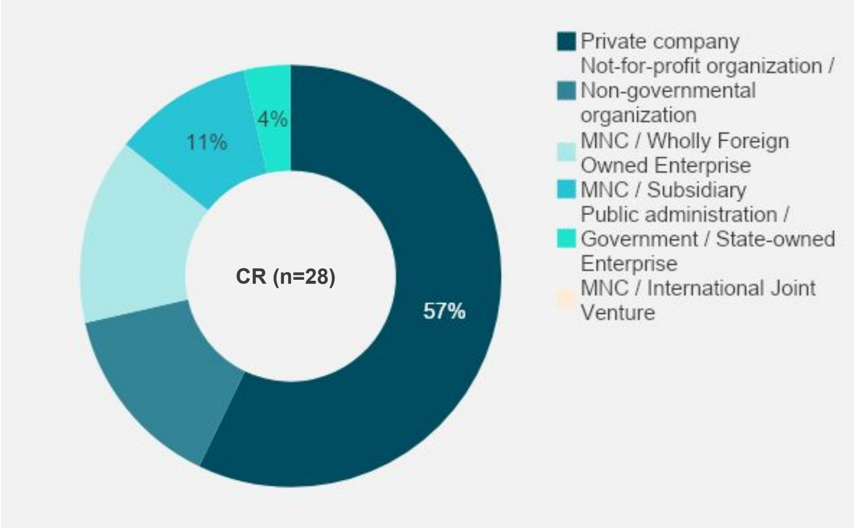
2.3 Participating Organizations — By Industry Sector and Type

Private companies, Not-for-profit / Non-governmental organizations, and MNCs constituted the largest proportion of respondents for the Philippine market.

Except for Hong Kong, the highest number of respondents came from Private companies. In the Philippines, Private Companies made up 57% of the respondents.

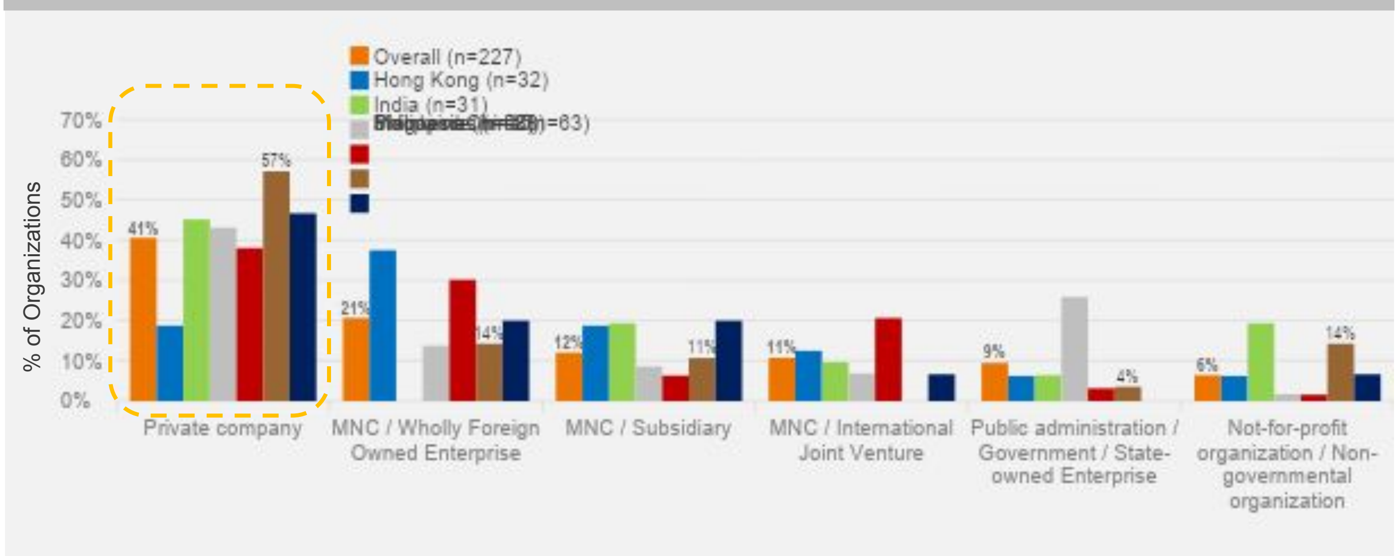
Private companies are the largest participants

Q. What is your company status?



Private companies are the largest participants across markets barring Hong Kong

Q. What is your company status?

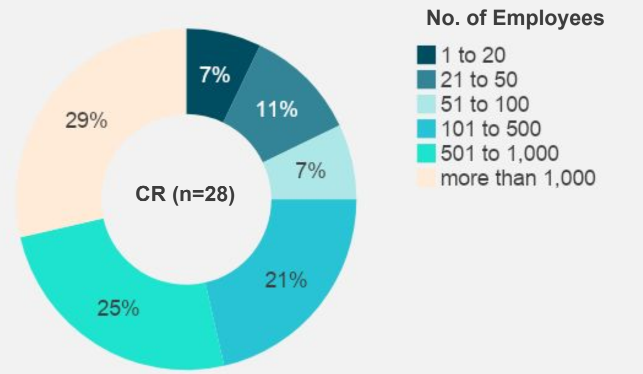


2.4 Participating Organizations — Distribution by Employees

In the Philippines, the survey has reached out to companies of varying employee size ranging from 100 employees or less (25%), 101 to 1000 employees (46%), and more than 1000 employees (29%).

Well diversified sample

Q. How many people does your company employ locally?

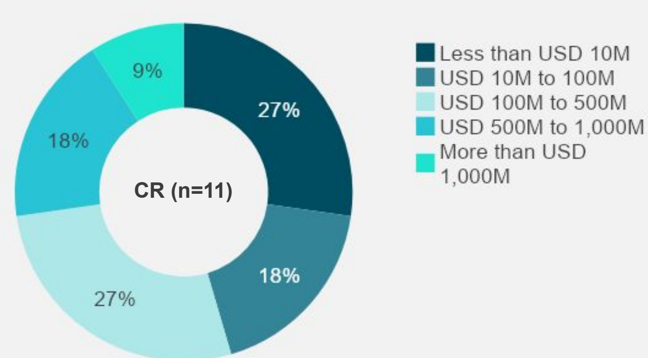


2.5 Participating Organizations — Distribution by Revenues

The CR respondents come from varying revenue brackets ranging from less than USD 10M (28%), USD 10M to 500M (45%), up to USD 500M to more than 1,000M (27%).

The CR respondents are from varying revenue size companies.

Q. What is the company size in terms of revenue in USD million per year (local market only)?

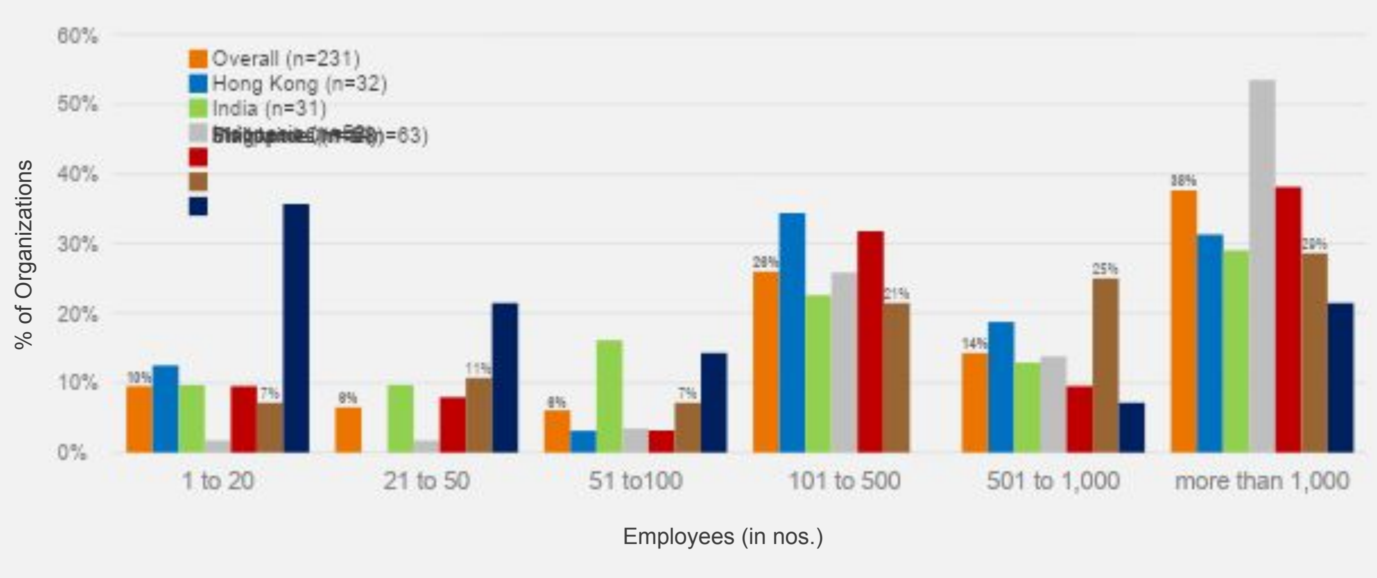


2.6 Participating Organizations by Employees — Marketwise

The distribution by employee population varies across the different markets. For most markets, the highest number of Company Representative respondents come from companies with more than 1000 employees, with an overall reach of 38%.

Employee population sample size varied in different markets

Q. How many people does your company employ locally?

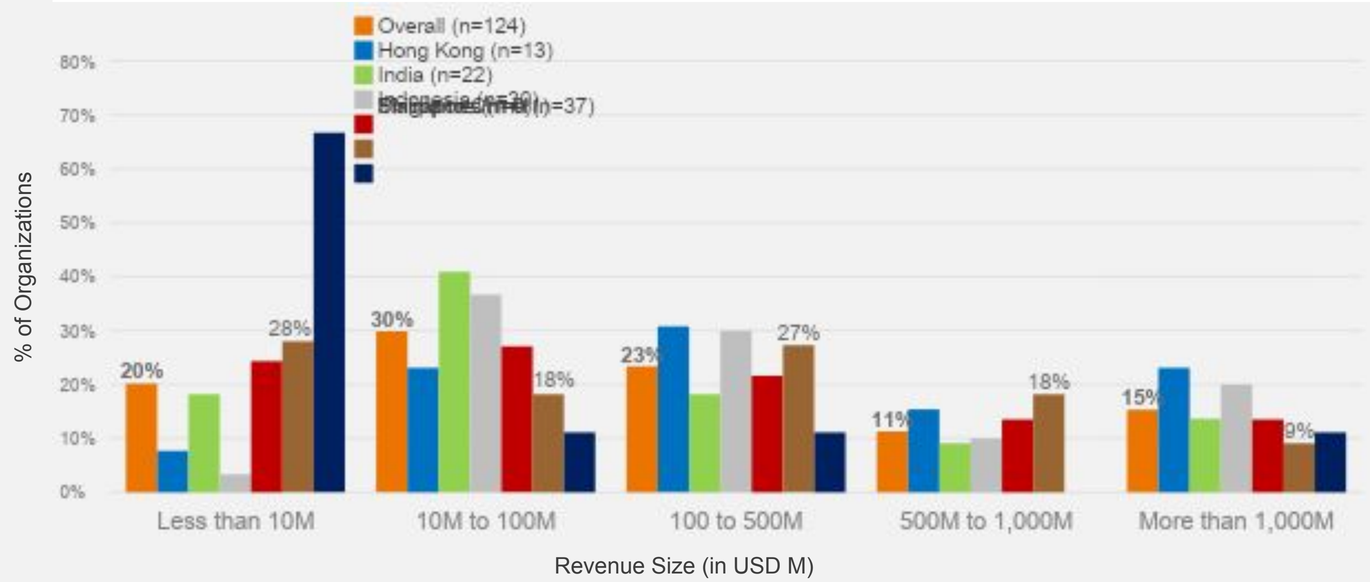


2.7 Participating Organizations by Revenue Size — Marketwise

The distribution by revenues varied across the different markets; overall, 30% of the companies' sampled have a revenue size of USD 10M to 100M.

Market –wise breakdown

Q. What is the company size in terms of revenue in USD million per year (local market only)?



2.8 Distribution of Coaches by Age

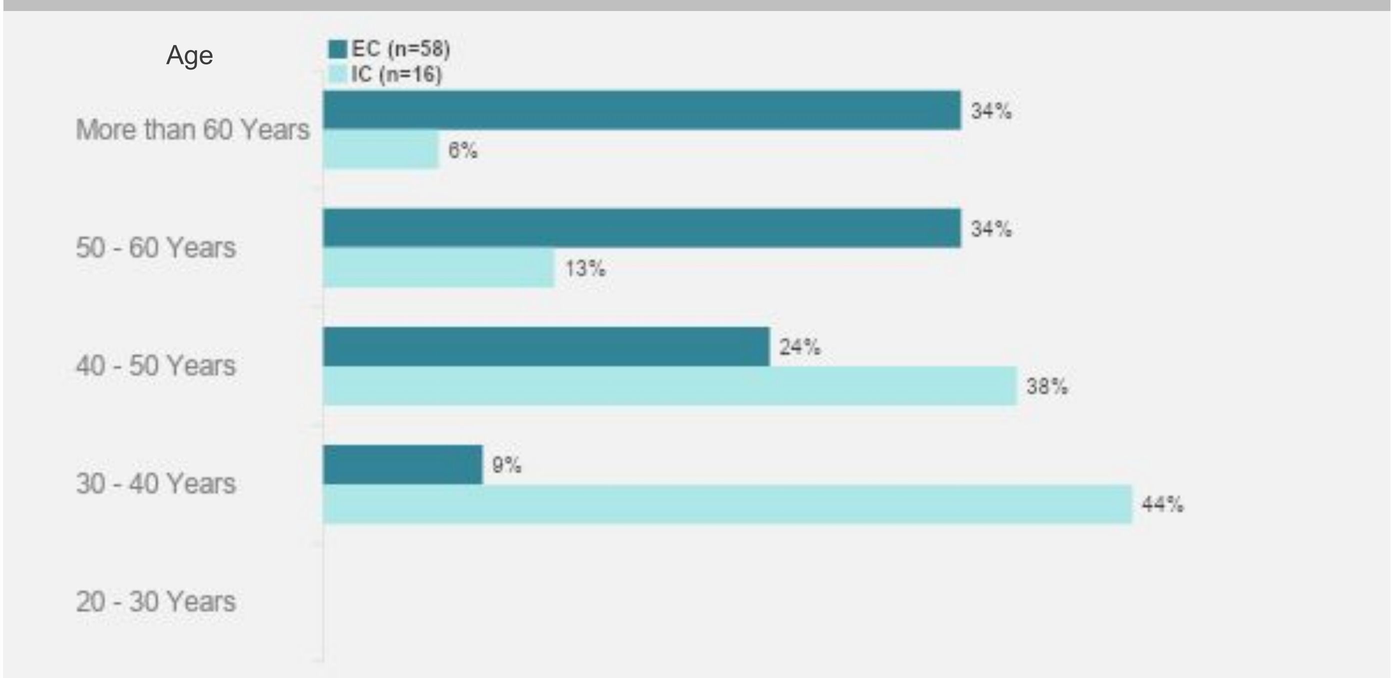
Median age of EC is 51.5 years and median age of IC is 42 years

For ECs, 34% of ECs are in the age range of 50 to 60 years old, 34% are more than 60 years, 24% from 40 to 50 years, and only 9% from 30 to 40 years. Majority of the EC respondents are more than 50 years.

For ICs, the opposite trend emerged: 44% of ICs are in the age range of 30 to 40 years, 38% from 40 to 50 years, 13% from 50 to 60 years, and only 6% are more than 60 years. Majority of the IC respondents are less than 50 years old.

For the overall population of coach respondents, the average age of an EC is 49 years and average age of an IC is 42 years.

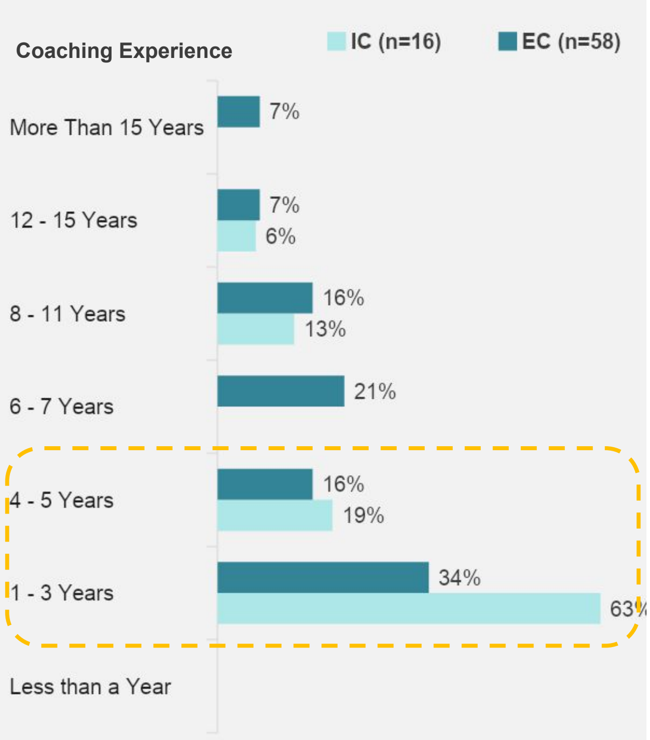
Q. What is your birth year?



2.9 Distribution of Coaches by Years of Experience

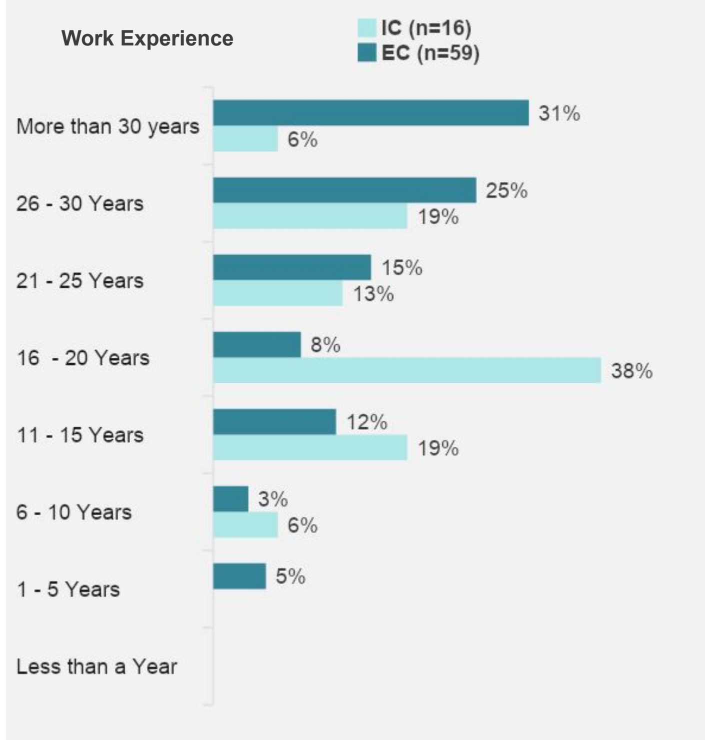
ECs have average coaching experience of 6 years, whereas ICs have average coaching experience of 4 years

Q. How many years of coaching experience do you have?



ECs have average work experience of 26 years, whereas ICs have average work experience of 20 years

Q. How many years of overall work experience do you have?



For the Philippines and the overall population of coach respondents, ECs have relatively more coaching experience than ICs. Half (50%) of ECs have coaching experience of up to 5 years, the other half have experience ranging from 6 to15 years and above. For the ICs, 81% have coaching experience of up to 5 years and only 19% have experience ranging from 6 to 15 years and above. More than half (63%) of ICs reported they have coaching experience of 1 to 3 years.

For the Philippines and the overall population of coach respondents, ECs have relatively more work experience than ICs. More than half (56%) of ECs have work experience of 26 to 30 years and above, whereas the rest have experience ranging from 1 to 25 years. For the ICs, 76% have work experience of ranging from 6 to 25 years and only 19% have experience ranging from 6 to 15 years and above. More than half (63%) of ICs reported they have coaching experience of 1 to 3 years.

2.10 Profile of Typical EC Participant

The ECs in Singapore, India and HK have more coaching experience than the ECs in the Philippines, Mainland China, and Indonesia

For the overall population of coach respondents, the average age of an EC is 49.7 years, the average coaching experience is 7.9 years, and 75% of ECs have work experience of 20 years and more.

EC respondents in the Philippines have an average age of 53.0 years, which is close to India's 52.9 years and is the highest average age among the markets. EC respondents in Mainland China have the lowest average age of 46.3 years.

EC respondents in the Philippines have an average coaching experience of 6.8 years. EC respondents in Indonesia have the lowest average coaching experience of 5.7 years, while EC respondents in Singapore have the highest average coaching experience of 10.4 years.

India has the lowest number of Female ECs as compared to other markets.

	Female Coaches	Average Age (Yrs)		Coaching Experience (Yrs)		Overall Work Experience ≥ 20 years
		Median	Mean	Median	Mean	
Hong Kong (n=76)	74% (59%)	51.0	50.5 (49)	8.0	9.1 (8)	80% (72%)
India (n=76)	39% (39%)	52.0	52.9 (51)	8.0	9.9 (7)	85% (65%)
Indonesia (90)	54%	46.5	46.9	3.0	5.7	60%
Mainland China (n=103)	67% (64%)	46.0	46.3 (47)	4.0	6.8 (7.2)	72% (64%)
Philippines (n=58)	69%	51.0	53.0	5.5	6.8	76%
Singapore (n=58)	64%	50.0	51.8	9.0	10.4	80%
Other (n=30)	53%	51.5	50.2	7.0	11.0	77%
Overall (n=491)	**60%**	49.0	**49.7**	5.0	**7.9**	**75%**

*n may vary for each column depending on how many answered those questions

Nos. in bracket are from 2017 Survey

2.11 Profile of Typical IC Participant

The ICs in India and Singapore have more coaching experience than the ICs in HK, the Philippines, Mainland China, and Indonesia.

For the overall population of coach respondents, the average age of an IC is 43.2 years, the average coaching experience is 5.0 years, and 50% of ICs have work experience of 20 years and more.

IC respondents in the Philippines have an average age of 41.4 years. IC respondents in Mainland China have the lowest average age of 39.6 years, while IC respondents in India have the highest average age among the markets.

IC respondents in the Philippines have an average coaching experience of 4.3 years. IC respondents in Indonesia have the lowest average coaching experience of 3.2 years, while IC respondents in India have the highest average coaching experience of 13.8 years.

India and Indonesia have the lowest number of Female ICs as compared to other markets.

	Female Coaches	Average Age (Yrs)		Coaching Experience (Yrs)		Overall Work Experience ≥ 20 years
		Median	Mean	Median	Mean	
Hong Kong (n=8)	63%	48.5	46.1	5.5	6.0	75%
India (n=10)	30%	53.5	52.1	12.5	13.8	70%
Indonesia (n=37)	30%	43.0	42.8	2.0	3.2	44%
Mainland China (n=28)	57%	39.0	39.6	2.0	3.3	32%
Philippines (n=16)	69%	40.0	41.4	3.0	4.3	56%
Singapore (n=8)	75%	49.0	47.3	9.0	8.8	88%
Other (n=1)	0%	36.0	36.0	4.0	4.0	0%
Overall (107)	48% (64%)	42.0	43.2 (43)	3.0	5.0 (5.8)	50% (46%)

*n may vary for each column depending on how many answered those questions

Nos. in bracket are from 2017 Survey

Something to ponder:

With the increasing demand of coaching for millennials and with companies focusing more on building internal capability for coaching, how do the more mature ECs stay relevant?

3

Landscape of Coaching Market

3.1 Growth of Coaching Services

For the sample of organizations reached, Coaching is a relatively young concept as 68% of the organizations have used coaching for less than 3 years

The growth of coaching services could be attributed to the deeper penetration in existing markets as well as expansion into new markets and industry sectors.

In the Philippines, 18% companies have used coaching services for more than 10 years, but an equal proportion of companies have used coaching services for less than 1 year. Half of the companies reached have used coaching for 1 to 3 years, while 14% for 3 to 10 years. This points to a recent growth in companies using coaching. In relation to the distribution by industry sector, coaching is penetrating deeper in the Philippine Private sector and expanding into new industry sectors like Not-for-Profit / Non–Government sectors and MNCs.

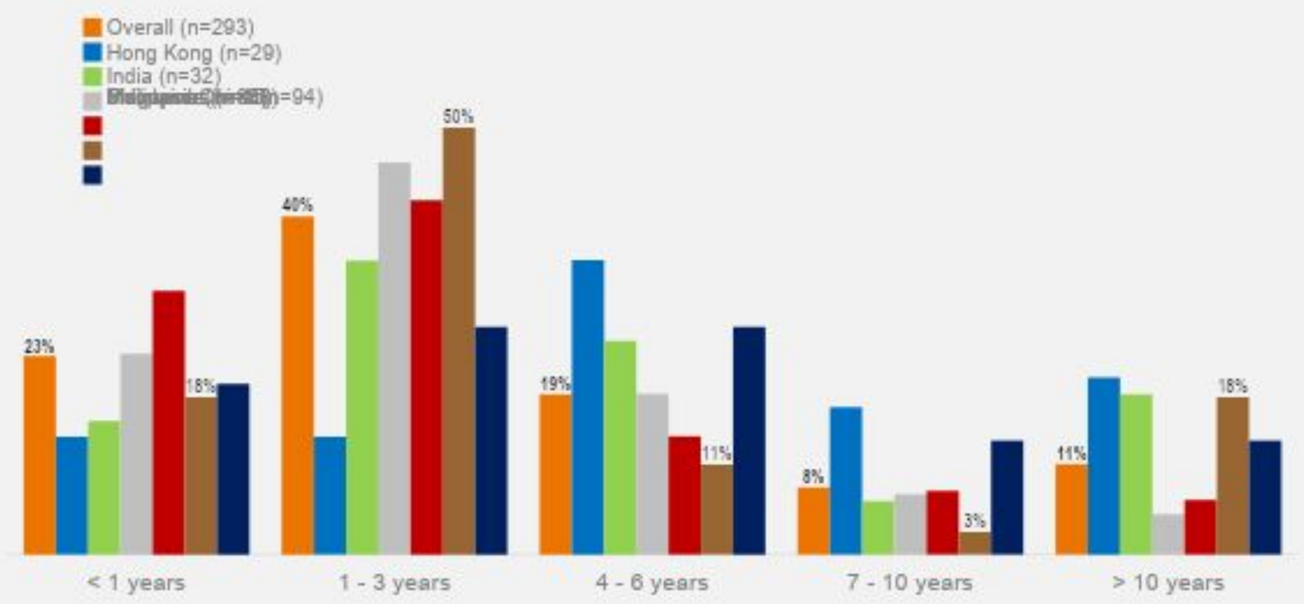
Q. Please indicate how long your company has used coaching in your market location.

3.2 Penetration of Coaching Services — By Market

Coaching is a young industry as 63% of the organizations have used coaching for less than 3 years.

There would seem to be relatively recent growth in Indonesia, Philippines, Mainland China and India where more companies have used coaching for less than 3 years. Hong Kong and Singapore are relatively mature markets with more companies that have used coaching for 4 to 6 years.

Q. Please indicate how long your company has used coaching in your market location.



3.3 Adoption of Coaching Services

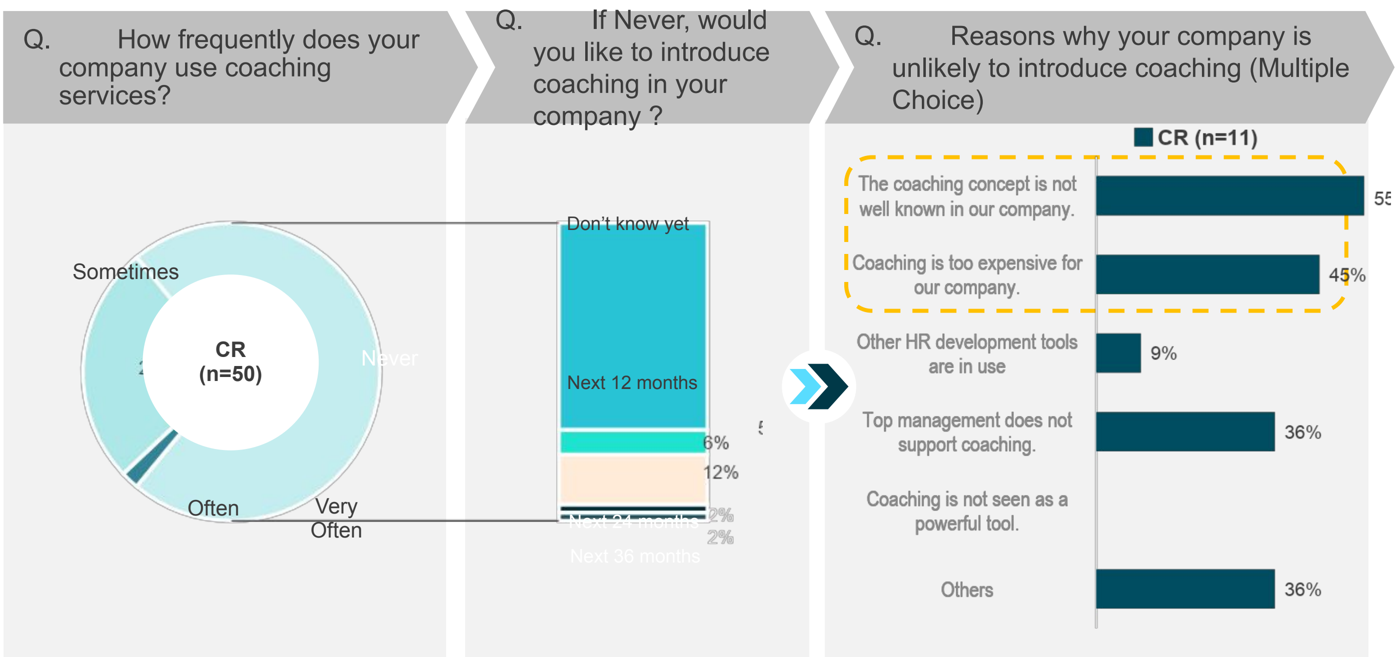
Organizations that have used Coaching "Sometimes" and "Never" comprise 72% of the market and reflect expansion opportunity.

Coaching services are being more widely adopted and there is opportunity for growth.

About 78% of Philippines companies surveyed have used coaching services. Those companies that have used coaching only "Sometimes" (50%) and "Never" (22%) comprise 72% of the market. This points to an expansion opportunity.

Of the 22% Philippine companies who have "Never" used Coaching, 16% indicated that they intend to adopt coaching in the next 1 to 3 years, while 6% indicated that they are unsure. The top 2 reasons for companies to not introduce coaching are:

- coaching concept is not well-known in the company
- coaching is too expensive for the company



3.3 Adoption of Coaching Services – cont.

74% of organizations that participated have used coaching services

Q. How frequently does your company use coaching services? (Considered those organizations who have used Coaching services)

In the 2017 Survey, 63% of companies used coaching services

Something to ponder:

Given the barriers that might be stopping companies from adopting coaching, what strategies can coaches take to manage the cost benefit arbitrage as perceived by the companies?

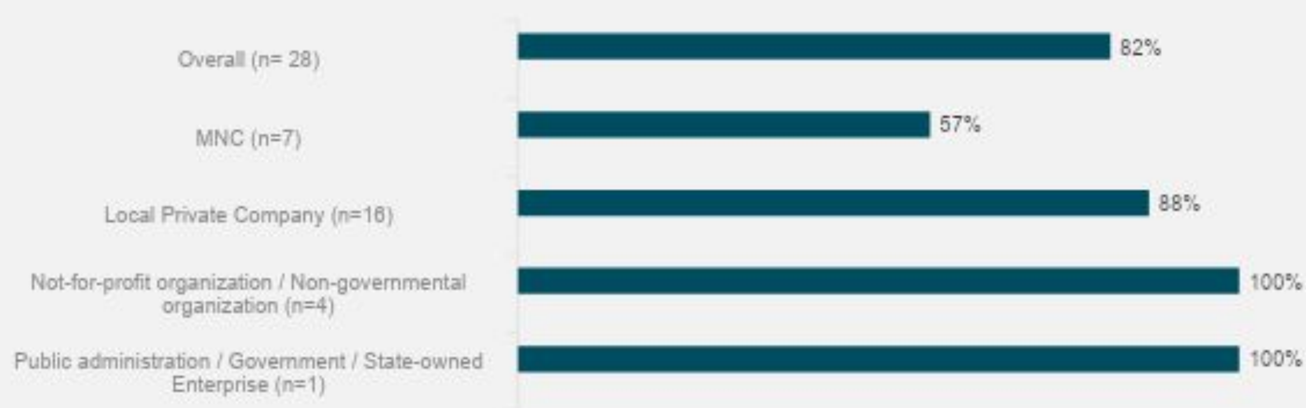
Can technology play a role in making coaching more cost-effective?

3.4 Coaching Services Adoption By Type of Organization

Widespread penetration across all types of organizations

Coaching seems to be permeating deeper and expanding into all company types. Among the types of Philippine organizations that responded to the questions, 100% of the Not-for-profit / Non-governmental Organizations and the Government / State-owned Enterprise have used coaching services, as well as 88% of the Private companies, and 57% of the MNCs.

Q. What is your company status? + Q. How frequently does your company use coaching services?



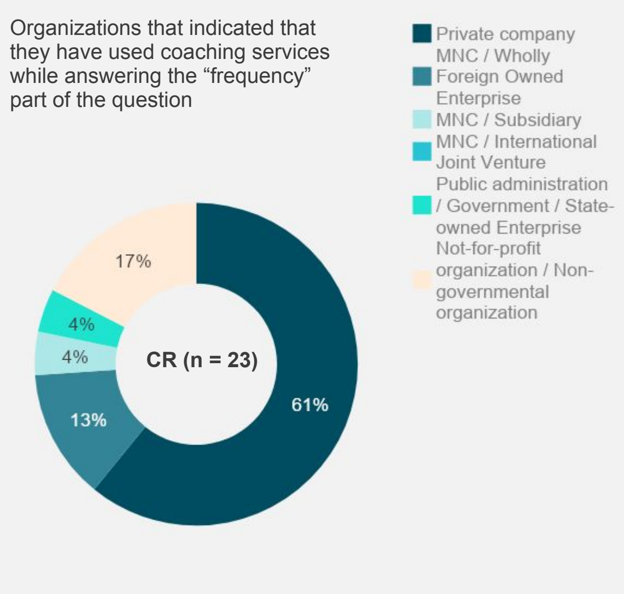
3.5 Target Clientele for ECs

EC's clientele is aligned with where the demand for coaching services is originating from, particularly in case of Private Companies. Also, 56% of ECs have Self-Paying clients as well as 32% as Start-up entrepreneurs.

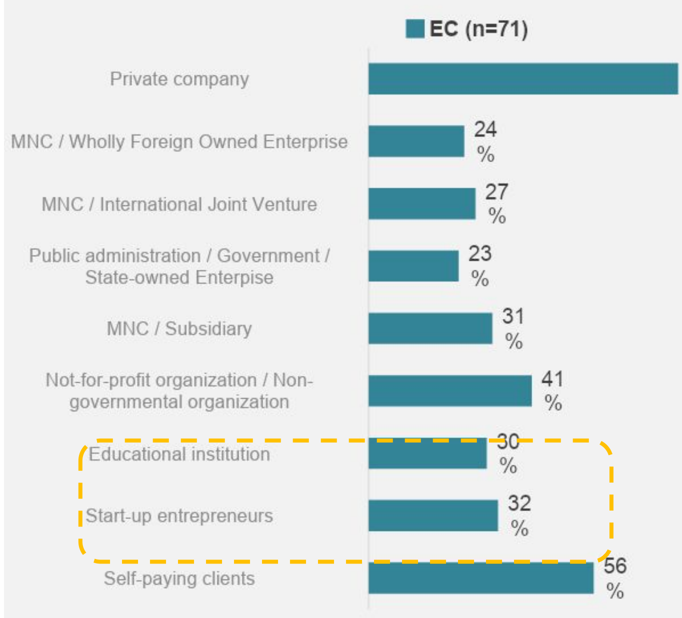
Philippine ECs have clients from various types of organizations. The top 3 organizations that ECs typically work with are Private Companies (77%), Self-Paying Clients (56%), Not-for-Profit / Non-governmental Organizations (41%). These data are aligned to the CR data on Private Companies (61%) and Not-for Profit / Non-governmental Organizations (17%) that use coaching services.

Philippine ECs also have clients from the different types of MNCs (82%), Start-up Entrepreneurs (32%), Educational Institutions (30%) and Government / State-owned Enterprises (23%).

Q. What is your company status? +
Q. How frequently does your company use coaching services?



Q. Please describe the type of organizations you typically work with. (Multiple Choice)

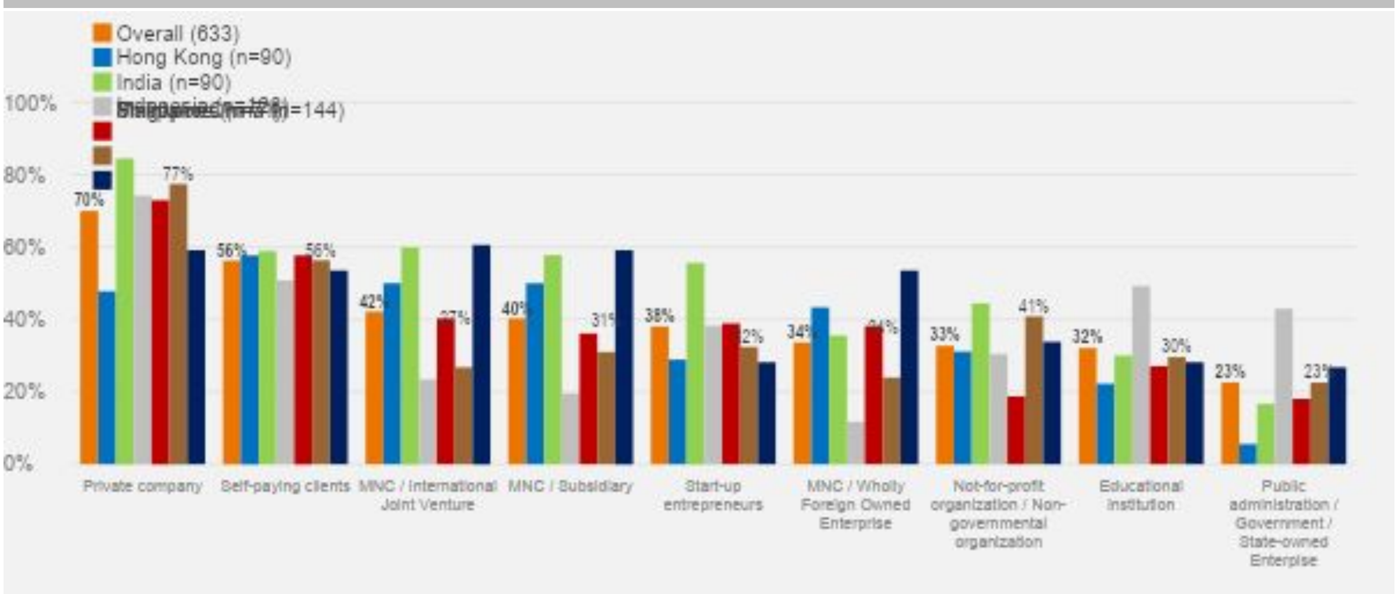


3.6 Target Clientele for ECs — By Market

Most ECs have Private Companies and Self-paying clients

Across all markets, Private Companies and Self-paying Clients top the list as the most relevant client group for ECs. MNCs are the third largest with the highest for Singapore (approx. 60%) and lowest in Indonesia (approx. 30%). Prevalence of coaching in the Not-for-Profit / Non-governmental Organizations is highest in India while coaching in the Educational and Government / State-owned Enterprises is the highest for Indonesia.

Q. Please describe the type of organizations you (EC) typically work with. (Multiple Choice)



In the 2017 Survey, the top 4 were Wholly Foreign Owned Enterprise, International JV, Private Company and Self-paying Clients.

Something to ponder:

Coaching is permeating deeper into the market. There is opportunity for growth and expansion into new industry sectors. What will the coaching industry need to do to be able to effectively meet this demand?

3.7 Target Groups for Coaching Services

The main target group for companies is senior and middle managers, and ECs and ICs are aligned with this.

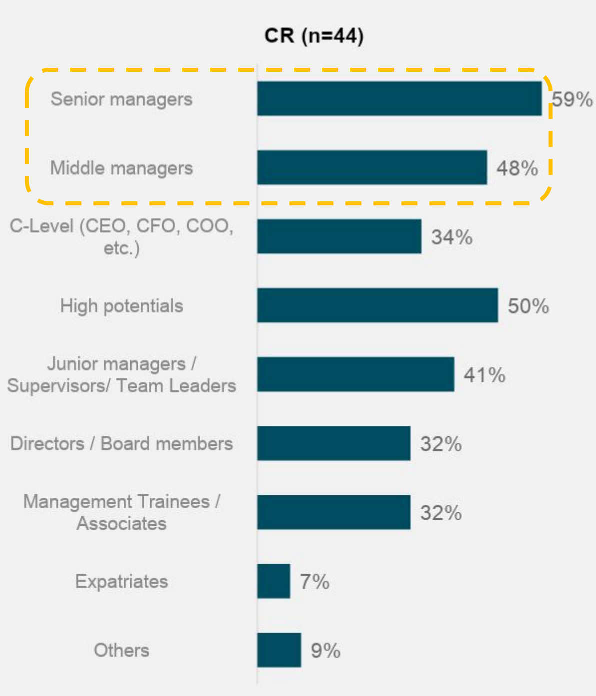
Philippine companies offer coaching to all levels of management with a majority of coaching targeted at Senior Management.

The 3 highest target groups receiving coaching services in companies are Senior Managers (59%), High Potentials (50%), and Middle Managers (48%).

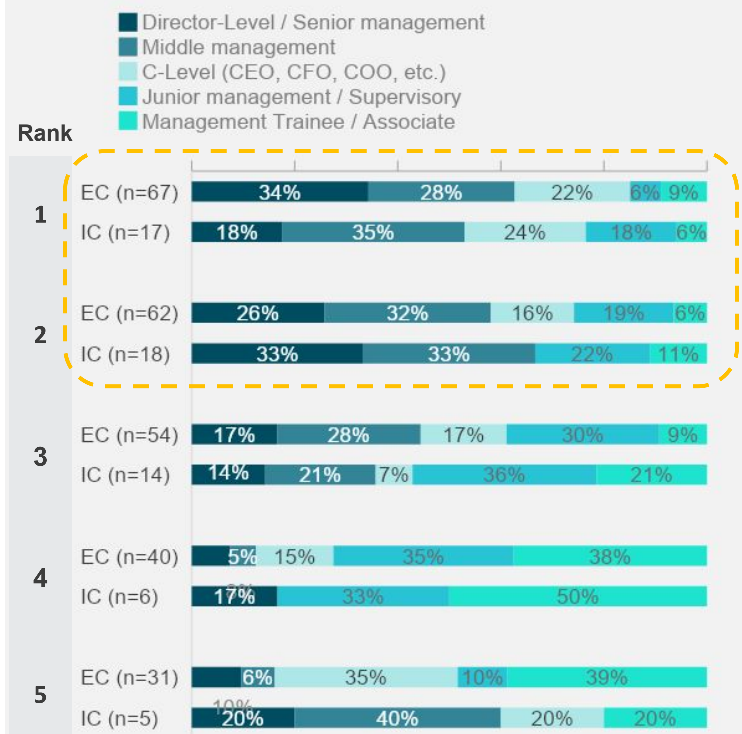
Philippine companies also offer coaching to 41% of Junior Managers / Supervisors / Team Leaders, 34% of C–Level Executives, 32% to Directors / Board Members and 32% to Management Trainees / Associates.

When we compare ECs to ICs, we find that their main clients are also from Senior and Middle Management.

Q. Which are the main target groups of coaching services in your organization? (Multiple Choice)



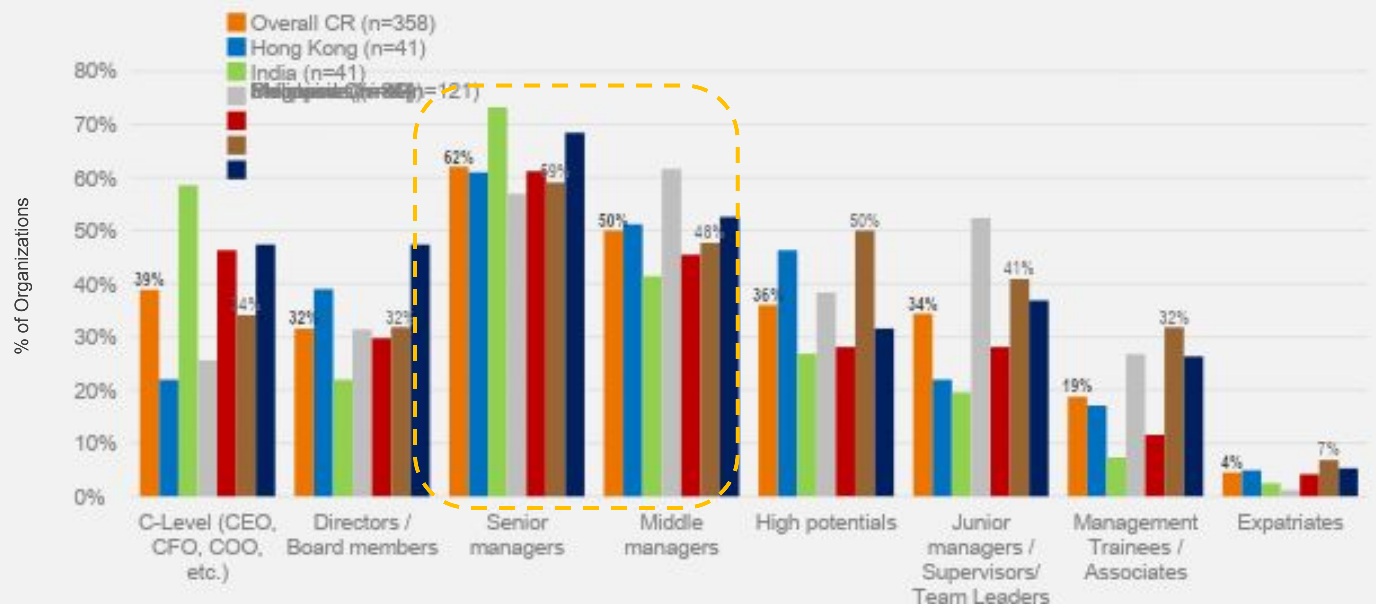
Q. Please select and rank the corporate level/position of your coachees. (Multiple Choice)



3.8 Target Groups for Coaching Services — By Market

The greatest need for coaches is in the level of Senior and Middle Managers across all markets.

Q. Which are the main target groups of coaching services in your organization? Response from CR (Multiple Choice)



In the 2017 Survey, Companies offered coaching to all management levels. Senior management level is targeted more for coaching in China than in HK and India

3.9 Types of Coaching Intervention — By Target Groups

Companies offer all types of coaching interventions across all levels of management from Management Trainees to C-Level Executives

For the Philippine market, One-to-One Coaching is the most widely offered coaching intervention, especially for High Potentials (72%) and C-Level Executives (61%). For Directors / Board Members, there is greater focus in Team or group coaching (40%) and Training on Coaching Skills (33%) over One-to-One Coaching (27%).

Training on Coaching Skills is offered to more Middle Managers (36%) and Senior Managers (34%) than other management levels.

More than half of the companies say they offer One-to-One coaching to Management Trainees (53%).

Q. Which 'type' of coaching interventions do you offer to the target groups selected in the previous question?

Something to ponder:

It will be interesting to explore how coaching skills are utilized in building a company culture and promoting best practices.

3.10 Language Used to Deliver Coaching

87% CRs answered that English is the medium of coaching. English is the leading language used by both ECs (99%) and ICs (95%) while 79% ICs used the local language as the medium of coaching.

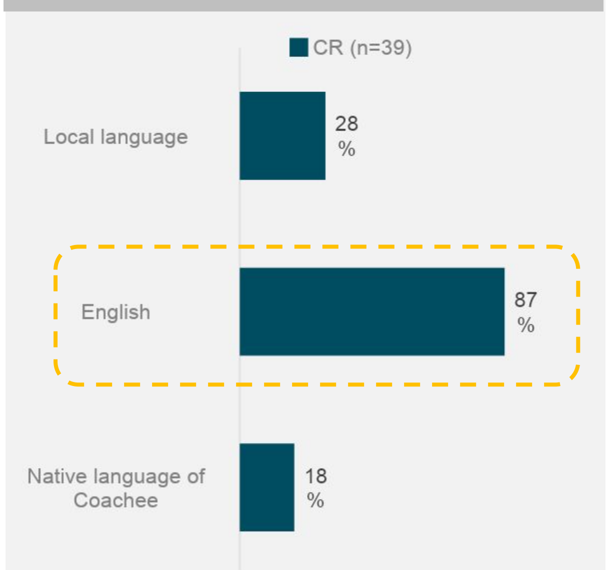
English is the most used language for coaching in the Philippines.

For Philippine companies, coaching in English is the most prevalent (87%), followed by Local language (28%) and Native language of Coachee (18%).

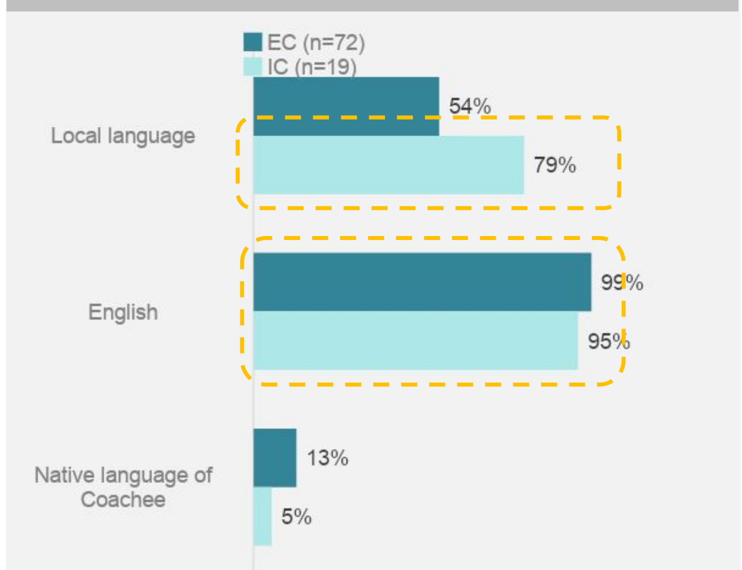
For ECs, coaching in English is the most prevalent (99%), followed by Local language (54%) and Native language of Coachee (13%).

For ICs, coaching in English is the most prevalent (95%) followed by Local language (79%) and Native language of Coachee (5%). ICs are more aligned to the demand of coaching in the local language.

Q. In which language is the coaching delivered? (Multiple Choice)



Q. In which language is the coaching delivered? (Multiple Choice)



Something to ponder:

As coaching expands in the Philippines, do we have sufficient coaching resource (e.g. qualified coaches) to meet increasing demand?

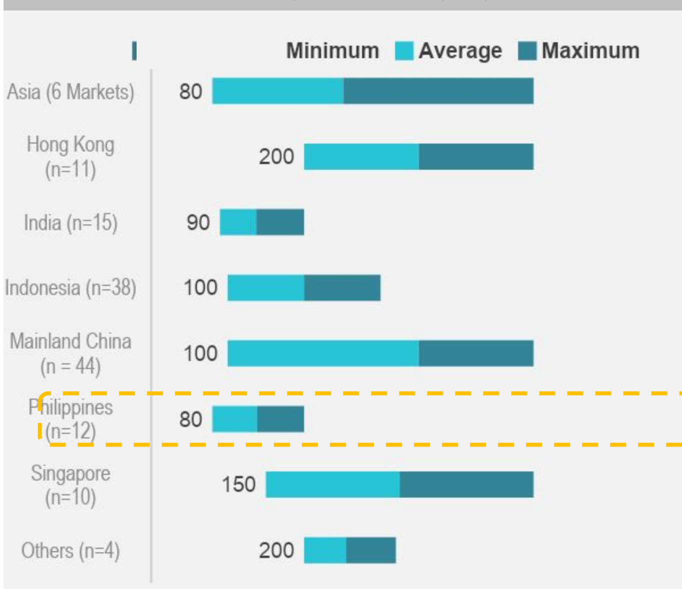
3.11 Coaching Rates

Coaching rates differ by markets. Organizations pay lower in Indonesia, India and Philippines vs Hong Kong, Singapore and Mainland China.

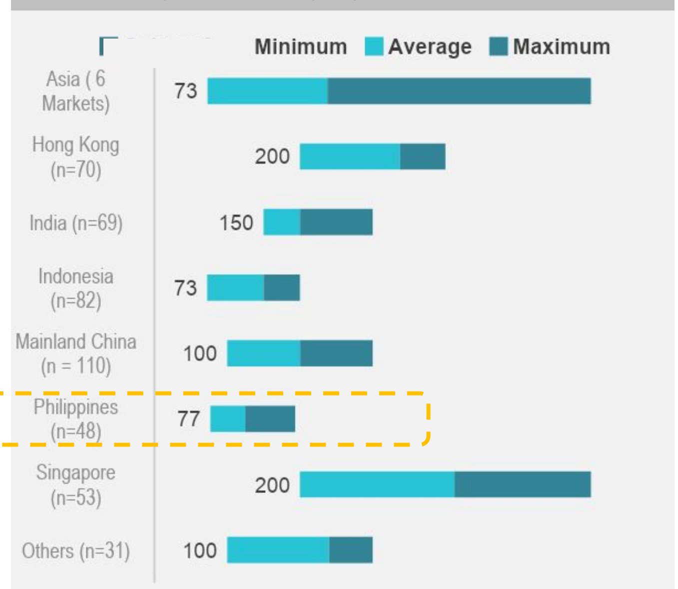
Coaching rates range from USD 80 to 500 across the markets, with the average rate of USD 251. Coaching rates are lowest in India (USD 138), Philippines (USD 139), followed by Indonesia (USD 200). Average coaching rates are higher for Singapore (USD 325), Hong Kong (USD 350) and Mainland China (USD 350).

Based on EC reports, coaching rates range from USD 73 to 600, with an average rate of USD 238. EC coaching rates are lowest in the Philippines (USD 125), Indonesia (USD 150), followed by India (USD 200) and Mainland China (USD 200). Average EC coaching rates are higher for Hong Kong (USD 338) and Singapore (USD 413).

Q. Please indicate the minimum and maximum hourly rate your company pays (in USD) for one-to-one coaching sessions? (CR)



Q. What are the minimum and maximum hourly coaching rates in USD for your one-to-one coaching sessions? (EC)



3.12 Coaching Specializations

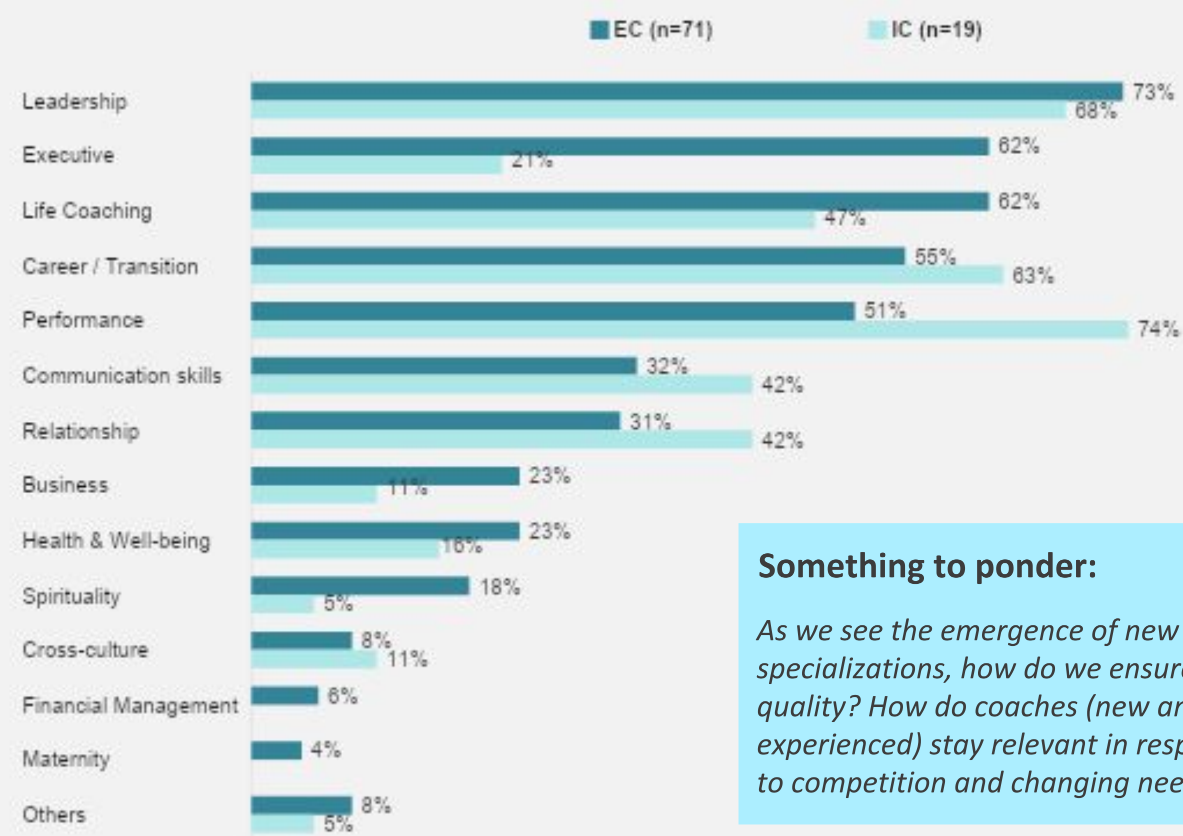
There is significant overlap in the areas that ICs and ECs are specializing in.

While there is a significant overlap in the areas of specialization for ECs and ICs, ECs specializations are more wide spread and they are creating new niches for themselves.

The top coaching specializations for Philippine ECs are Leadership (73%), Executive (62%), Life (62%), Career / Transition (55%) and Performance Coaching (51%). For Philippine ICs, the top coaching specializations are Performance (74%), Leadership (68%), Career / Transition (63%), Life (47%), Communication Skills (42%) and Relationship Coaching(42%).

ECs are creating new and unique niches for themselves like Business, Health and Well-being, Spirituality, Cross-culture, Financial Management, Maternity and more.

Q. What are your coaching specializations? (Multiple Choice)



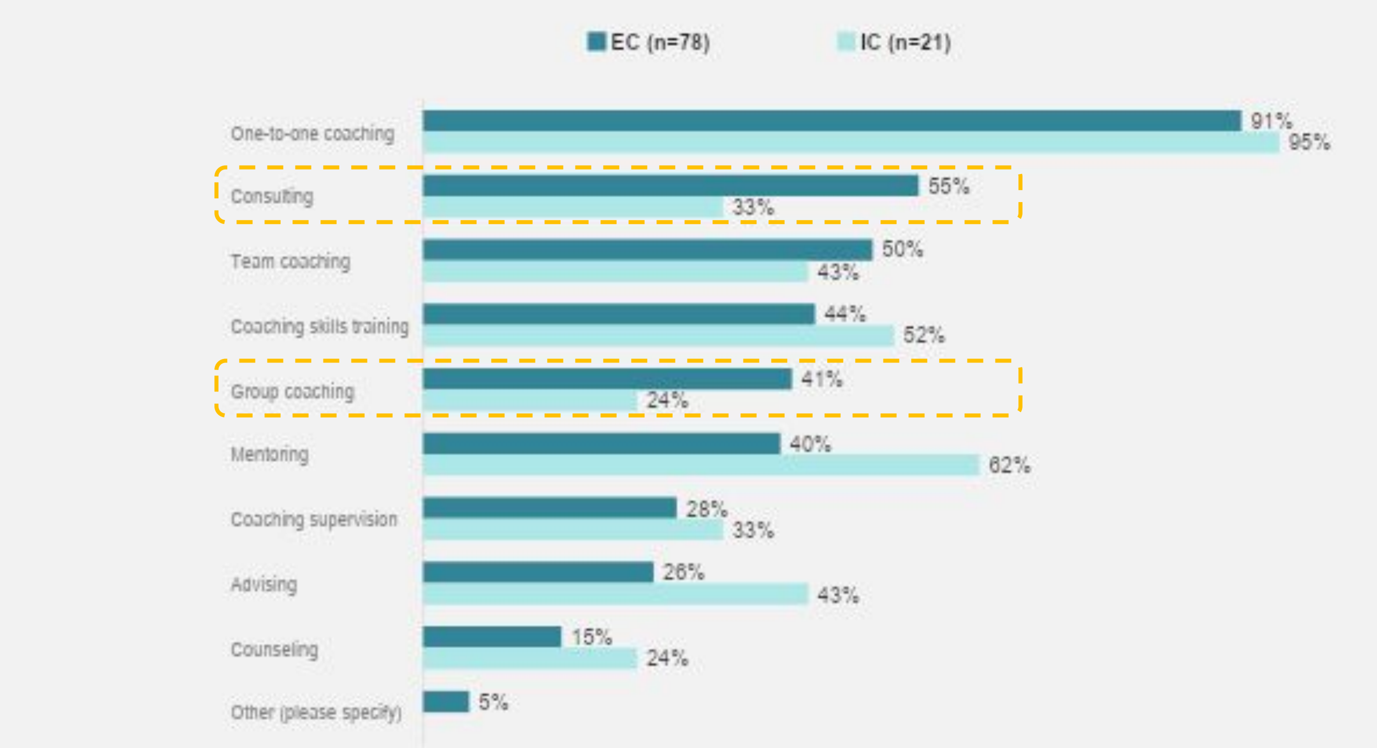
Something to ponder:

As we see the emergence of new niche specializations, how do we ensure quality? How do coaches (new and experienced) stay relevant in response to competition and changing needs?

3.13 Range of Coaching & Related Services

ECs do significantly more group coaching and consulting than ICs. ICs offer more Mentoring and Advising than ECs.

Q. Please indicate the range of coaching and related support services offered by your company. (Multiple Choice)



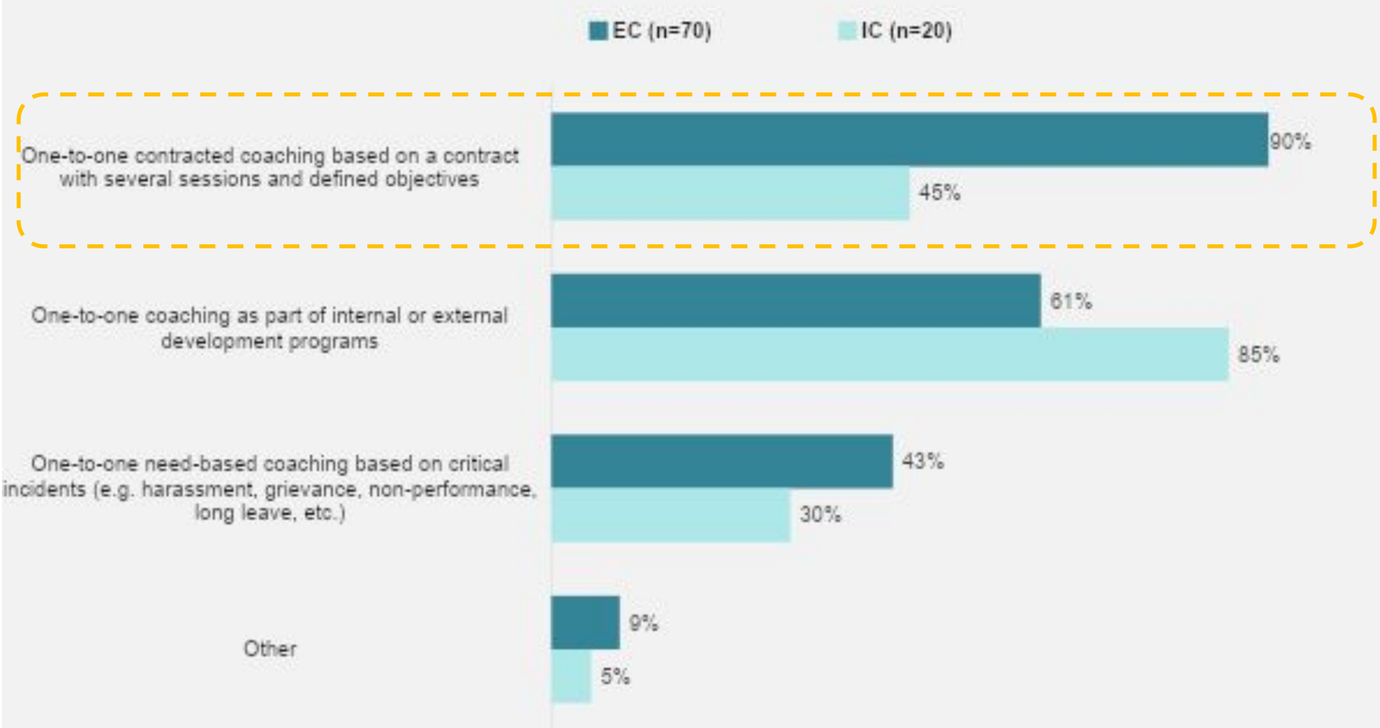
Philippine coaches offer a wide range of services with One-to-one coaching being the highest reported, followed by Consulting, Team coaching, and Coaching skills training. The extent of One-to-one coaching offered by ECs and ICs are 91% and 95%, respectively.

Compared to ICs, ECs offer significantly more Group coaching (41% vs. 24%) and Consulting (55% vs. 33%). Compared to ECs, ICs offer more Mentoring (62% vs. 40%) and Advising (43% vs. 26%).

3.14 Range of Coaching & Related Services — One-to-One Coaching Services

ECs offers more of contract-based coaching with several sessions and defined objectives.

Q. Please describe the type of One-to-One coaching service offered by your company. (Multiple Choice)



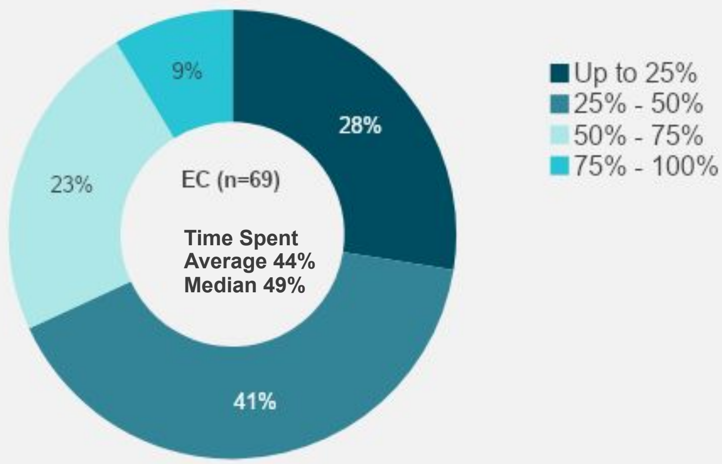
Philippine ECs offer significantly more contract-based One-to-one coaching as compared to ICs (90% vs 45%), whereas ICs offer more One-to-one coaching as part of development programs (85% vs 61%). This is understandable as ICs offer coaching as part of their job responsibilities.

Need-based coaching on critical incidents are also offered by both ECs (43%) and ICs (30%).

3.15 Proportion of Work-time Devoted to Coaching Sessions

ECs spend an average of 44% of their working time on coaching sessions.

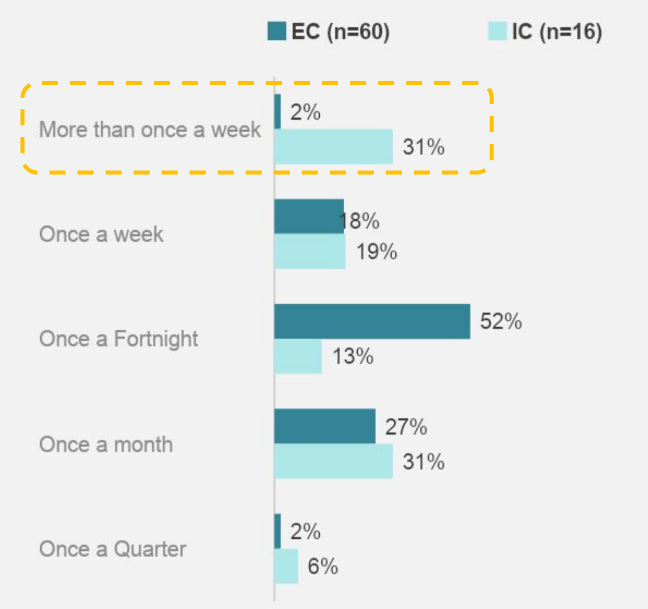
Q. What proportion of your working time is allocated to coaching sessions?



3.16 Frequency and Average Duration of Coaching Assignments

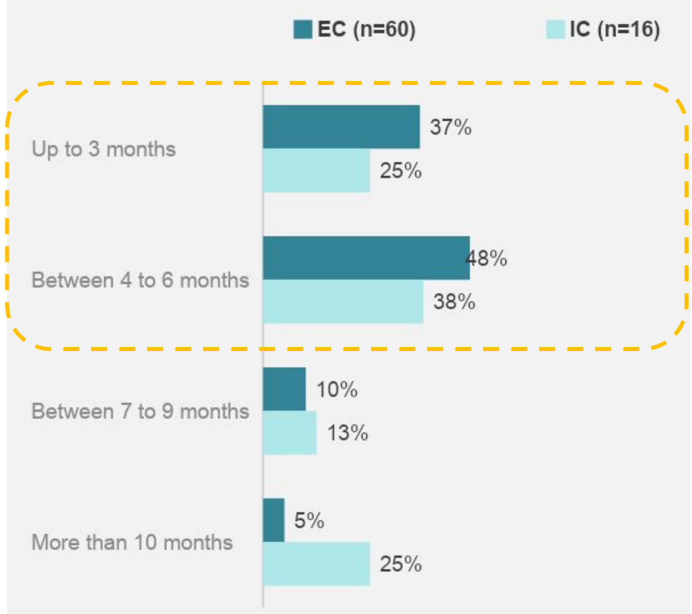
ICs do more frequent coaching assignments than ECs.

Q. What is the average frequency of sessions in a coaching assignment?



The large proportion of coaching assignments of ECs and ICs have an average duration of up to 3 months until 6 months.

Q. What is the average duration of a coaching assignment?



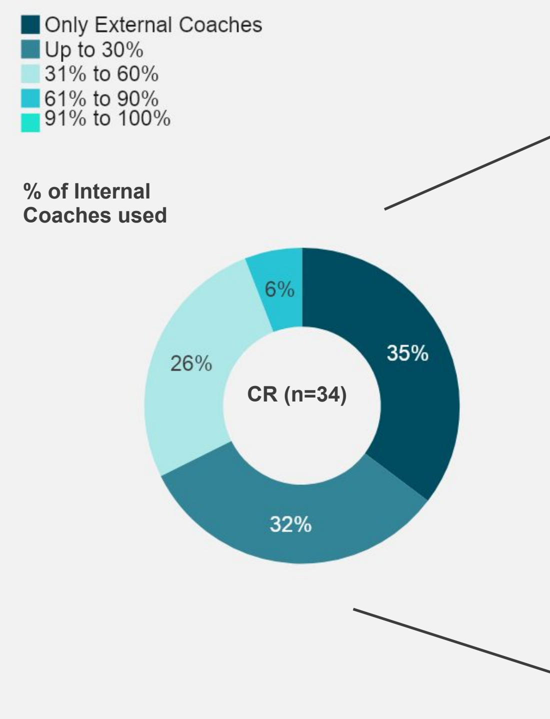
Philippine ICs deliver One-to-one coaching sessions more frequently than ECs. ICs deliver coaching sessions more than once a week (31%) or monthly (31%) and a coaching assignment lasts for up to 3 months until 6 months (63%).

A large proportion of ECs deliver coaching sessions once a fortnight (52%) or monthly (27%) and a coaching assignment usually lasts for up to 3 months until 6 months (85%).

3.17 Engagement and Perception of Internal Coaches

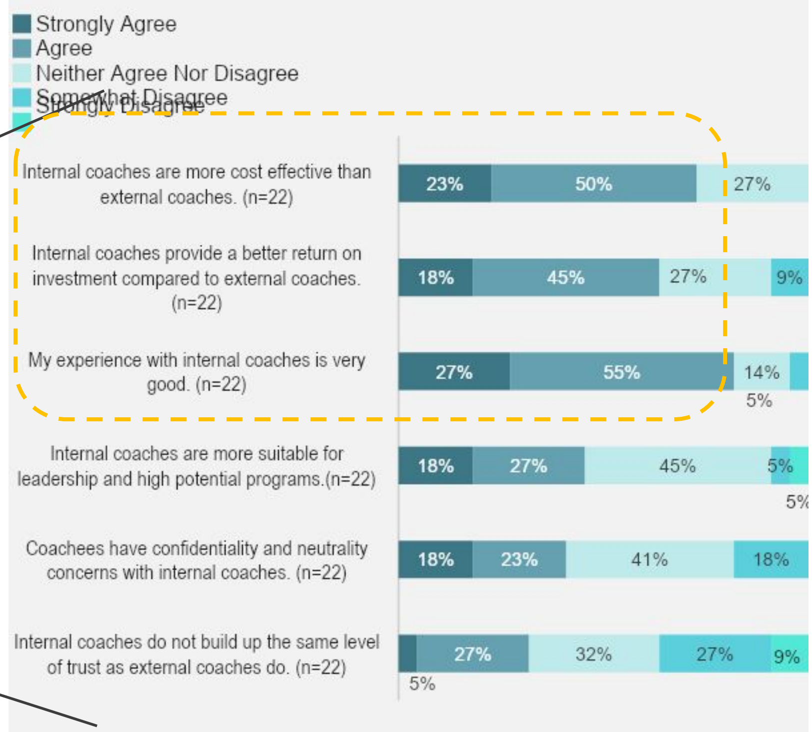
Only 35% of companies engage the services of 100% ECs; most companies work with a combination of ECs and ICs.

Q. Please indicate the percentage of internal coaches used in your organization.



Organizations find ICs more cost effective and provide better ROI than ECs.

Q. Please indicate the extent to which you agree with the following statements about internal coaches.



Philippine companies report that they use ICs to some extent (65%) and majority are satisfied with their service.

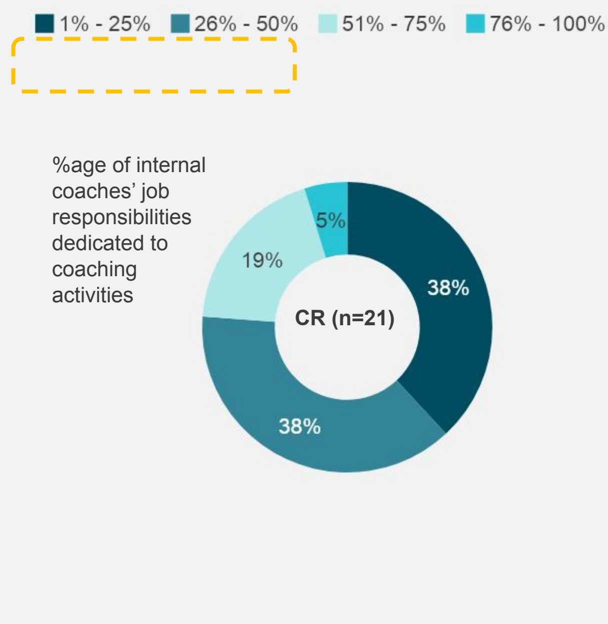
The companies that engage only ECs to meet their coaching needs comprise 35% of the respondents, while 6% of the companies are almost fully dependent on ICs. The remaining 59% companies use ECs and ICs to a varying range.

Most companies agree with the statement that their experience with ICs has been very good (82%). Companies also agree that ICs are more cost effective compared to ECs (83%) and provide a better return on investment than ECs (63%).

3.18 Responsibilities of Internal Coaches

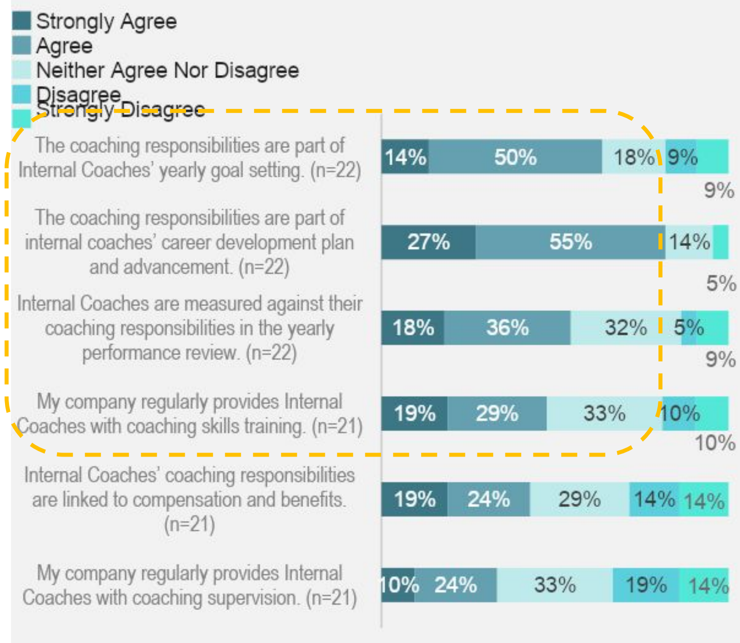
For 76% of companies, coaching is less than 51% of the IC's job responsibilities.

Q. On average, what percentage of internal coaches' job responsibilities are dedicated to coaching activities?



ICs have well-defined roles; however, coaching responsibilities are not directly linked with compensation and benefits.

Q. Please indicate the extent to which you agree with the following statements about internal coaches?



Majority of the companies report that coaching activities account for less than 51% of the IC's job responsibilities (76%). Only 24% of the companies report that coaching activities comprise of 51% to 100% of the IC's job responsibilities.

The companies surveyed agree that coaching responsibilities are a part of IC's annual goal setting (64%), career development plan and advancement (83%) and performance review (54%).

Coaching skills training for ICs are provided by 48% of companies and coaching supervision for ICs are provided by 34% of companies.

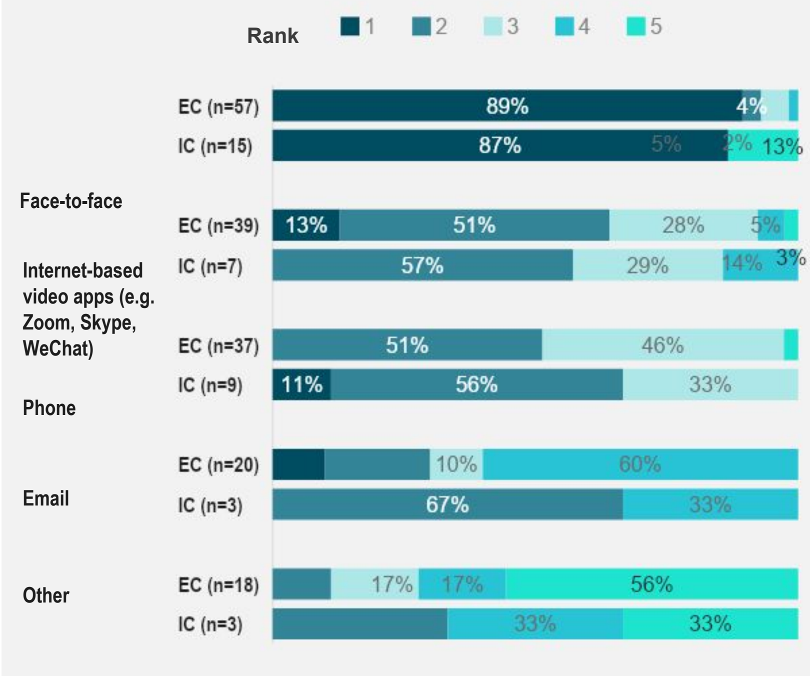
Something to ponder:

As companies strive to build internal capabilities for the future, how do they see the role of Internal Coaches evolving in the organization? How does this impact the role of External Coaches?

3.19 Medium of Coaching Assignment Delivery

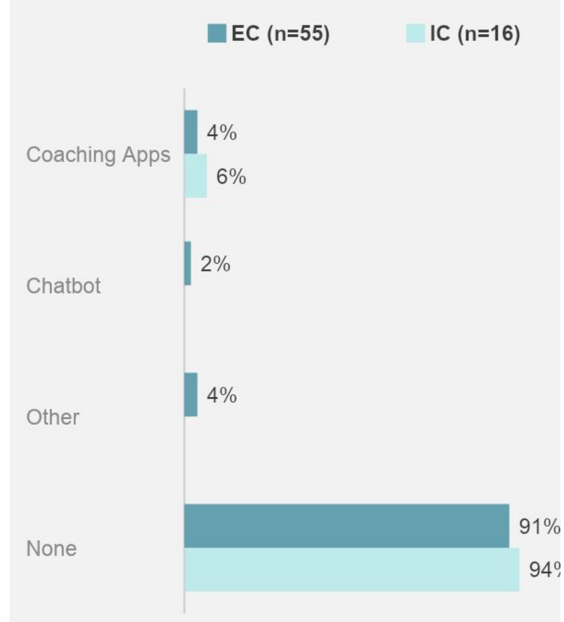
The medium of delivery most used by ECs and ICs is the Face-to-face meeting.

Q. Please select and rank the media used to deliver your coaching assignments? (Multiple Choice)



Most ECs (91%) and ICs (94%) do not use technology- or AI-based coaching tools.

Q. Please indicate if you are using technology- or AI-based coaching tools as part of your coaching assignments. (Multiple Choice)



Most of the tools mentioned in "Other" include internet-based apps like Whatsapp, Facebook Call, etc.

For Philippine coaches, face-to-face in-person meeting is the most used medium for delivery of coaching, such that 89% of ECs and 87% of ICs rank it as Number 1.

The two media closely tied at the Number 2 Rank are the virtual meeting via internet-based video apps such as Zoom or Skype and the phone.

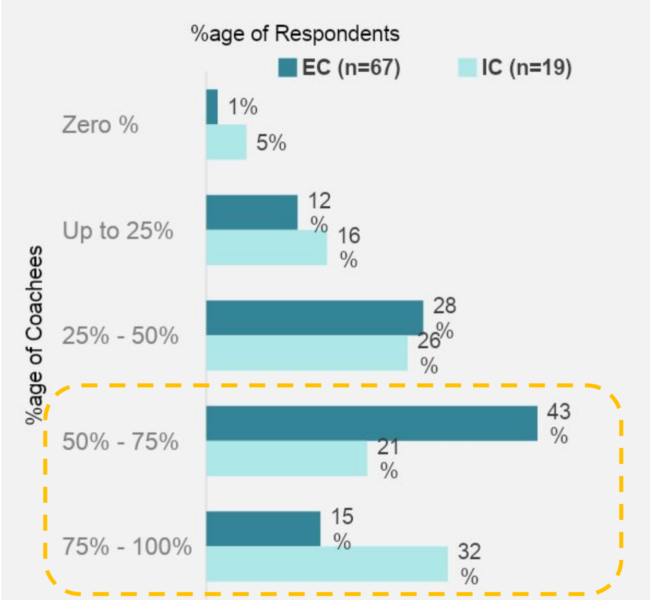
It is interesting to note that 4% of ECs and 6% of ICs use coaching apps and 2% of ECs are using Chatbots. Majority of ECs (91%) and ICs (94%) are currently not using any AI tool.

Perhaps AI has not yet extensively penetrated the coaching industry in the Asian markets. It will be interesting to see how this evolves.

3.20 Profile of Typical Coachees

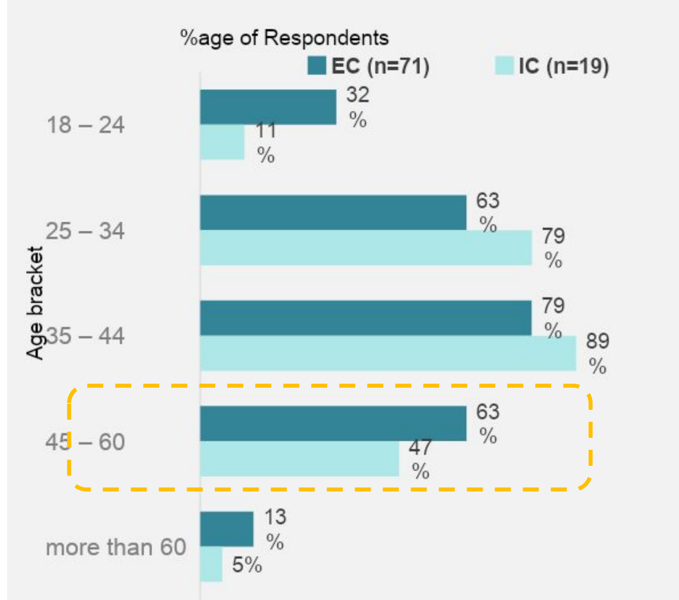
Both ECs and ICs report a higher percentage share of female Coachees.

Q. Please indicate the percentage share of your female coachees.



ECs have more tenured Coachees.

Q. Please indicate the age-range of your Coachees (in years)?



The percentage share of female coachees are reported to be 50% or more by the 58% of Philippine ECs and 53% of ICs. The age-range of clients for ECs is higher than ICs.

Most of the Coachees for ECs are between the ages of 25 and 60 years, with the highest being 35 to 44 years (79%) followed by 25 to 34 years (63%) and 45 to 60 years (63%).

Most of the Coachees for ICs are between the ages of 25 and 44 years, with the highest being 35 to 44years (89%) and 25 to 44 years (79%). The ICs have significantly less Coachees in the 45 to 60 years age bracket than ECs (47% vs. 63%). ICs are coaching a younger age group than ECs.

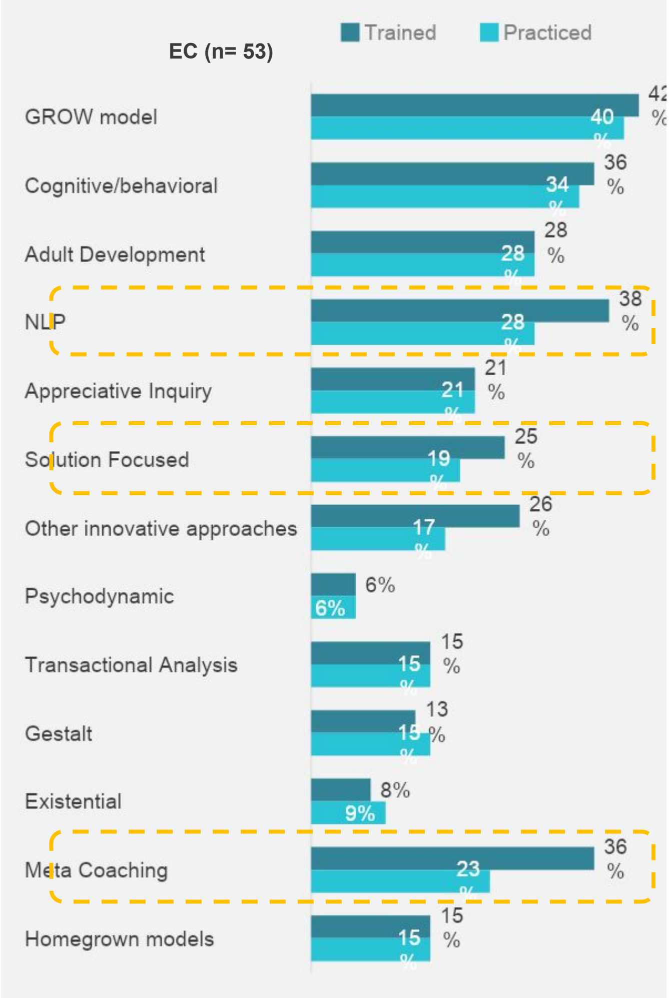
It is interesting to note that both ECs (32%) and ICs (11%) have Coachees in the age-range of 18 to 24 years .

3.21 Coaching Models — Trained vs. Practiced

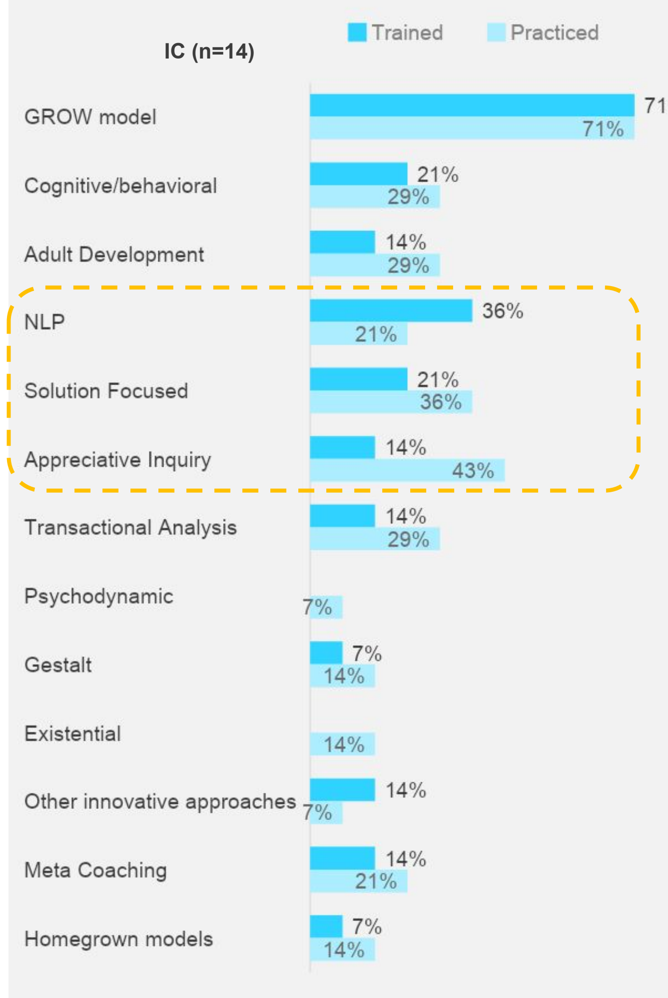
ECs and ICs use mostly well-known models. For ECs, there is divergence in NLP, Solution Focused and Meta Coaching in terms of Trained vs Practiced. For ICs, there is divergence in NLP, Solution Focused and Appreciative inquiry in terms of Trained vs Practiced.

ECs and ICs in the Philippines use a wide variety of coaching models and theories in their practice. The top three for ECs are GROW (40%), Cognitive/Behavioral (34%), and Adult Development (28%) and NLP (28%). The top three for ICs are GROW (71%), Appreciative Inquiry (43%) and Solution-Focused (36%).

Q. Please share the models of coaching you have studied, formally trained or self-trained in and whether you use them in your coaching practice? (Multiple Choice)



Q. Please share the models of coaching you have studied, formally trained or self-trained in and whether you use them in your coaching practice?(Multiple Choice)



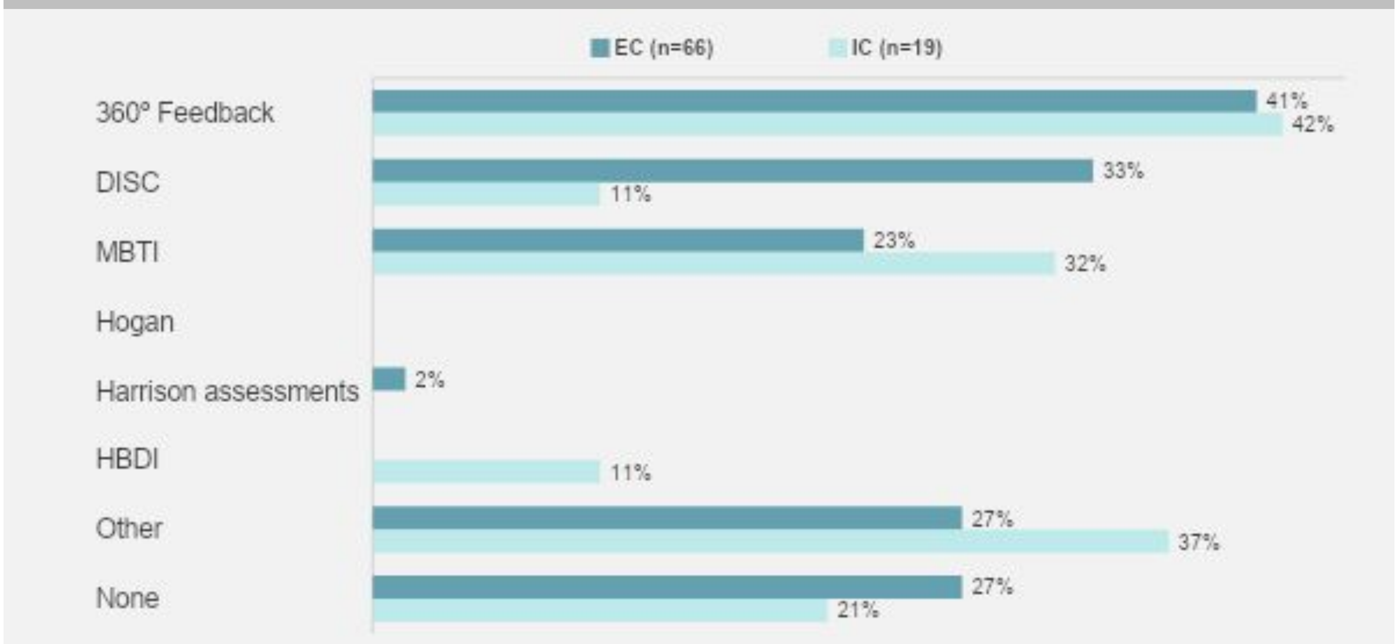
3.22 Diagnostic Tools Used in Coaching

The 360º Feedback, DISC and MBTI are the most widely used tools.

From among the tools listed, the 360º Feedback is the tool that is most used (EC 41%, IC 42%), followed by DISC (EC 33%) and MBTI (EC 23%, IC 32%). The ECs and ICs report that they use a variety of other diagnostic tools (EC 27%, IC 37%). However, there are also ECs and ICs who do not use any diagnostic tools (EC 27%, IC 21%).

Philippine ECs have also used "Other" diagnostic tools such as Clifton Strengths Finder, Meta-Coaching tools, Conversational Intelligence tools, Emotional Intelligence, Reiss Motivation Scorecard, Leadership Circle, Reiss Motivation Profile, Performance Scorecard, and Individual Development Plan. For Philippine ICs, "Other" diagnostic tools include company's internal tools, Thomas-Kilmann (TKI) assessments, FIRO-B, Fingerprint for Success, Wheel of Life and Individual Development Plans.

Q. Which diagnostic tools do you use in your coaching practice?



4
Coaching Beliefs and Philosophy

4.1 Understanding of Coaching

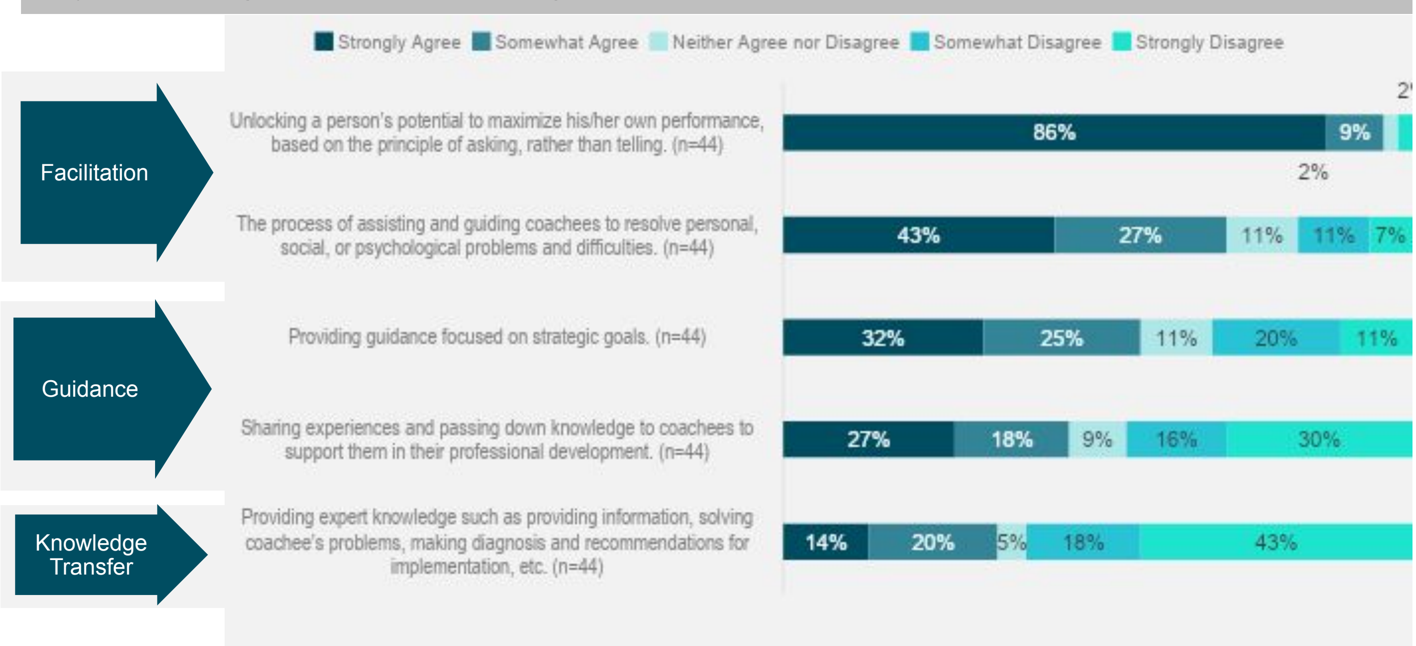
The prevailing understanding of coaching has elements of facilitation and guidance.

Definition of coaching provided by professional bodies such as ICF, EMCC and others is commonly meant to be facilitation of self-help. However, companies continue to expect elements of guidance and knowledge transfer as part of coaching.

The first chart points out that 95% of the sample companies agree with the notion that coaching is facilitation. However, in the second chart, when asked if coaching should focus primarily on facilitating self help, the percentage dropped to 64%.

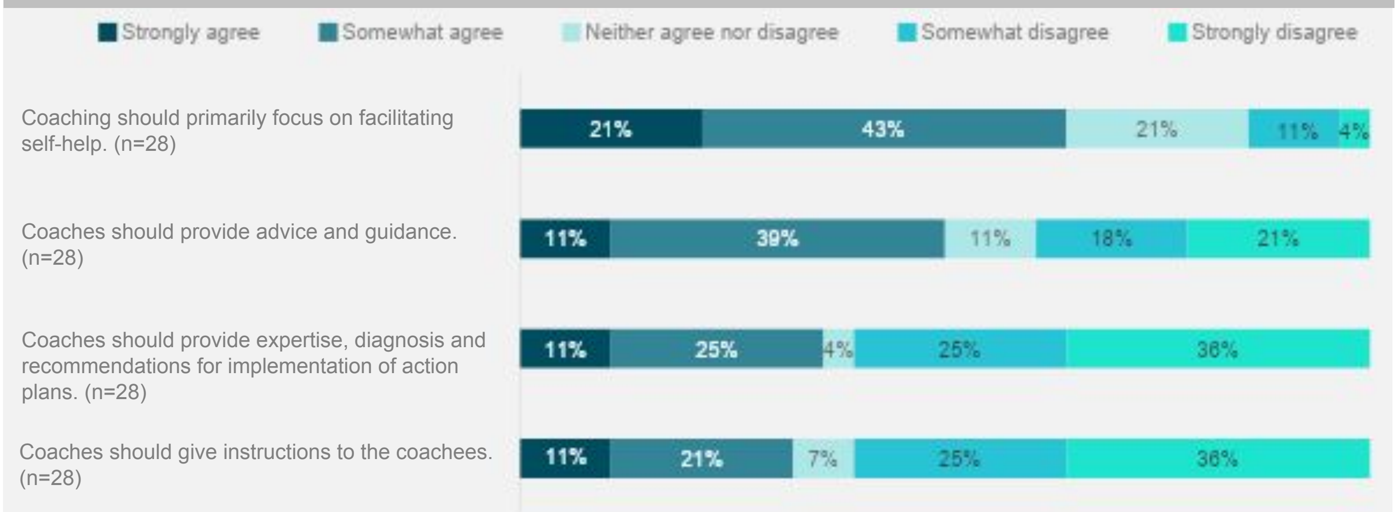
The third chart shows that Philippine ECs and ICs have similar perspectives about coaching although with varying levels of agreement and disagreement. For the ECs, 92% agree that coaching should focus primarily on facilitating self-help in contrast to only 69% of ICs. Both ECs and ICs disagree that coaches should provide advice and guidance (EC 55%, IC 81%), disagree that coaches should provide expertise, diagnosis and recommendations (EC 55%, IC 69%), and disagree that coaches should give instructions to the coachee (EC 72%, IC 76%).

Q. The understanding and the expectations of coaching may vary from individual to individual. Please indicate your level of agreement with the following statements.

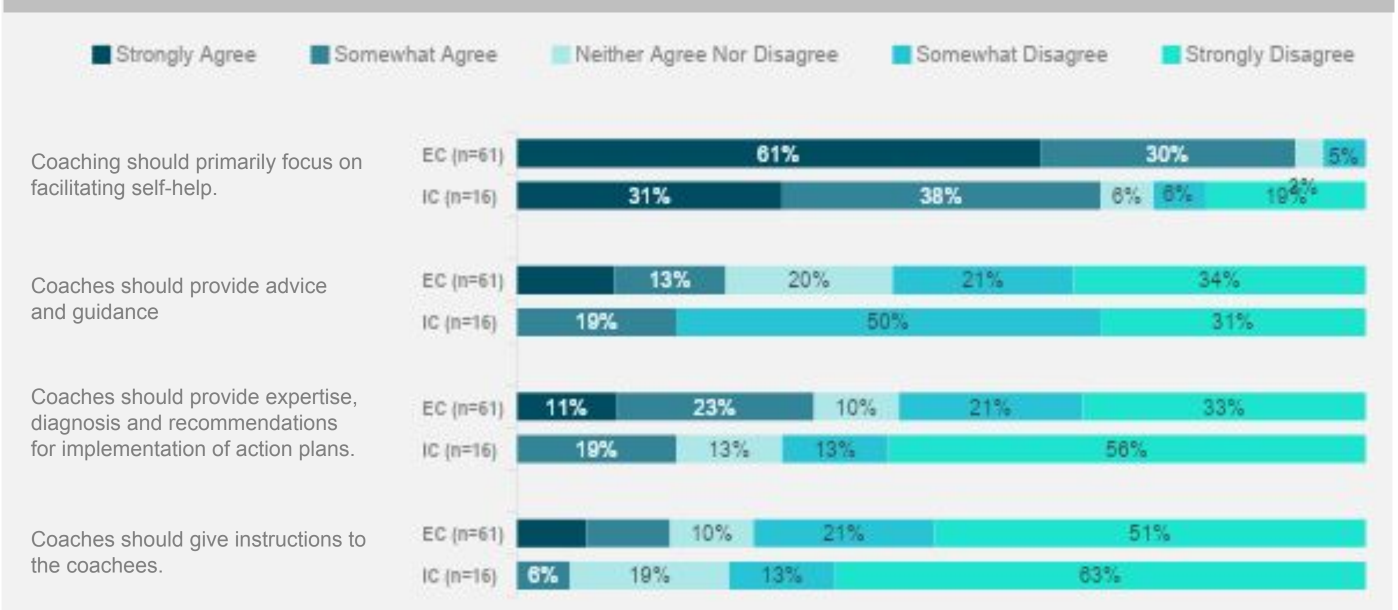


4.1 Understanding of Coaching – cont.

Q. Please indicate the extent to which you agree or disagree with the following statements about coaching.



Q. Please indicate the extent to which you agree or disagree with the following statements about coaching.

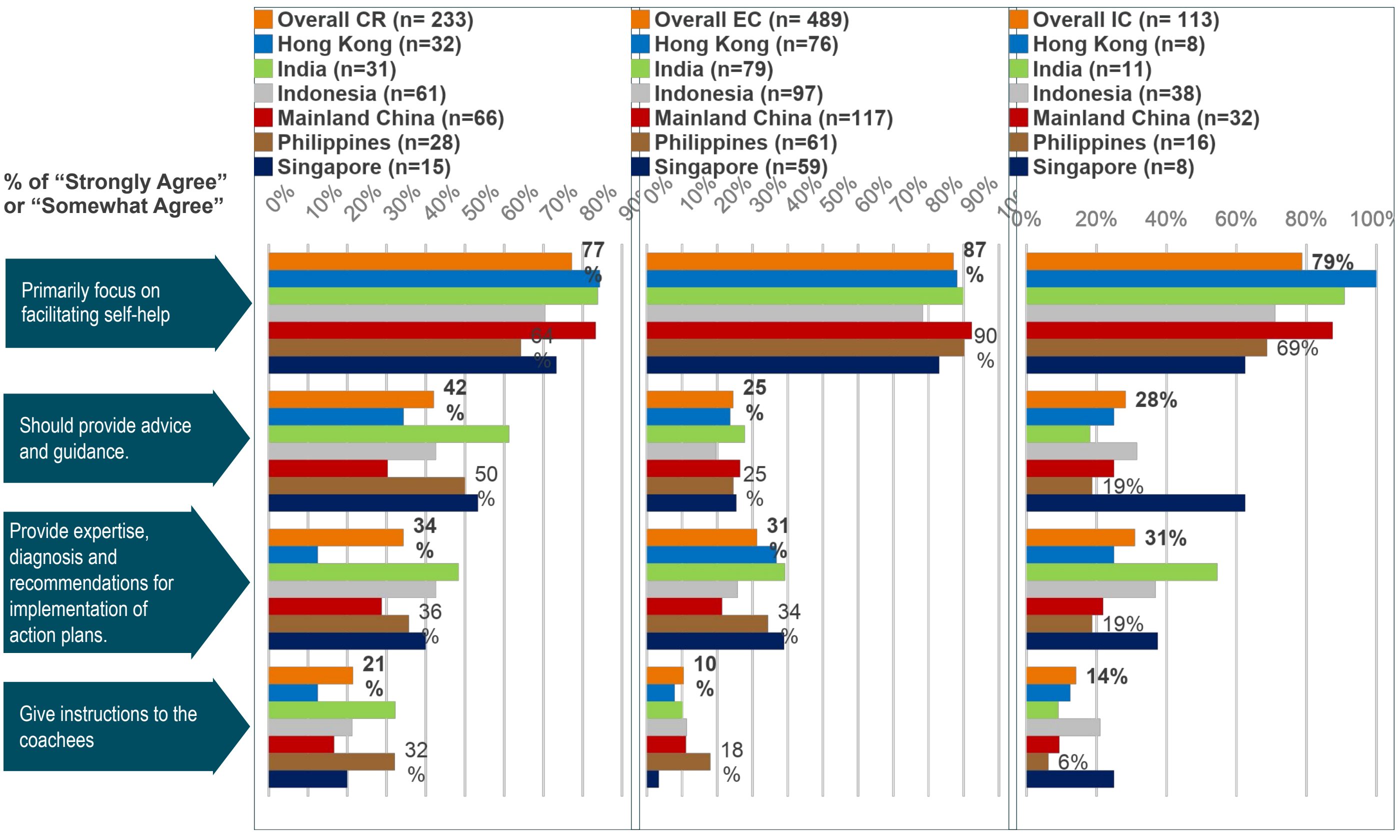


4.2 Understanding of Coaching — By Market

Similar trends appear in all six markets.

Across markets the understanding of coaching is a blend of facilitating self-help, guidance and providing solutions. The variance between expectations of companies and coaches is also observed across markets.

Q. Please indicate the extent to which you agree or disagree with the following statements about coaching.



Something to ponder:

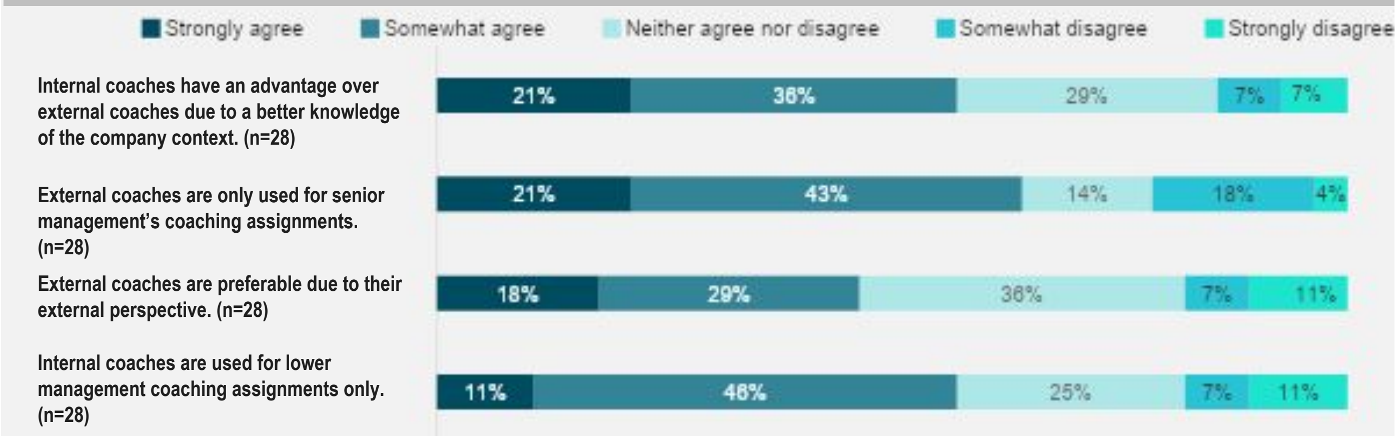
How can we acknowledge the unique identity and cultural values while upholding the coaching principle so it becomes more relevant to Asia?

4.3 Beliefs about Internal and External Coaches

More than 50% of Philippine CRs and ICs agree that ICs have an advantage over ECs due to a better knowledge of the company context, but only 36% of ECs concur.

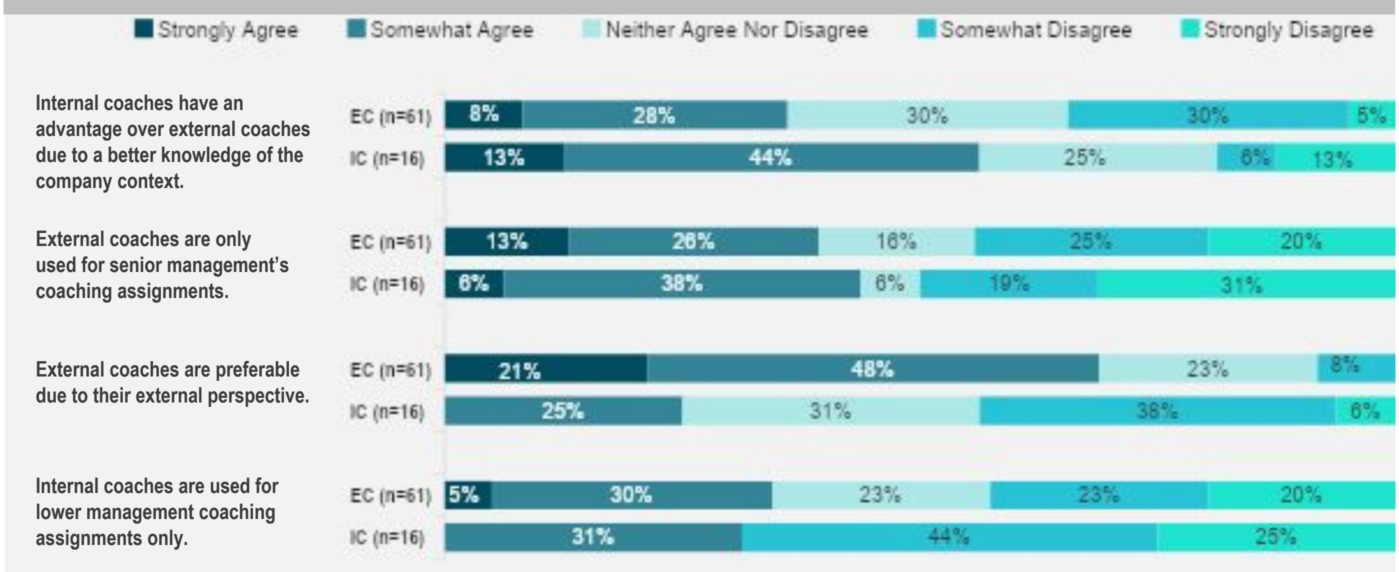
57% CRs think ICs have an advantage over external coaches, 64% prefer ECs for senior management's coaching needs, and 57% use ICs for lower management's coaching needs.

Q. Please indicate the extent to which you agree or disagree with the following statements about coaching.



There are marked differences in perceptions of ECs and ICs regarding their advantages over each other.

Q. Please indicate the extent to which you agree or disagree with the following statements about coaching.



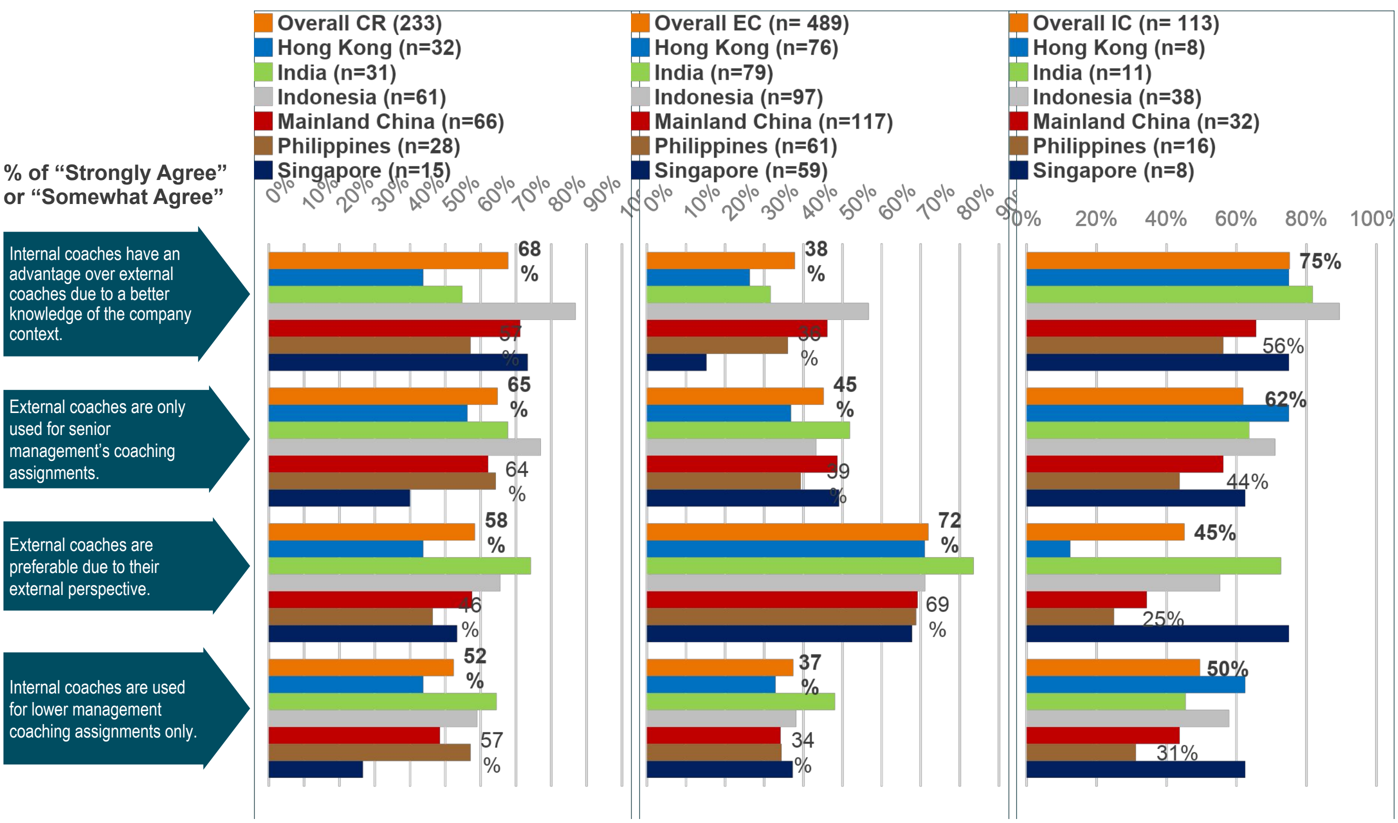
4.3 Beliefs about Internal and External Coaches – cont.

There seems to be consistency across markets in the marked differences between the beliefs of ECs and ICs about their advantages over each other.

The similar perspective about the advantage of ICs due to better knowledge of the company context is found in the Asian market data where higher percentage of CRs and ICs agree (CR 68%, IC 75%) while only 38% of ECs agree.

There is also variance in the belief of Philippine ECs and ICs about the preference for ECs due to their external perspective (EC 69% vs. IC 25%), and this difference in belief is shared by ECs and ICs in other markets (EC 72% vs. IC 45%).

Q. Please indicate the extent to which you agree or disagree with the following statements about coaching..



Something to ponder:

Perhaps the variance in perception is natural and inherent due to the competitive and overlapping nature of their work, is there also a need for realignment in understanding of the market for CRs, ICs and ECs?

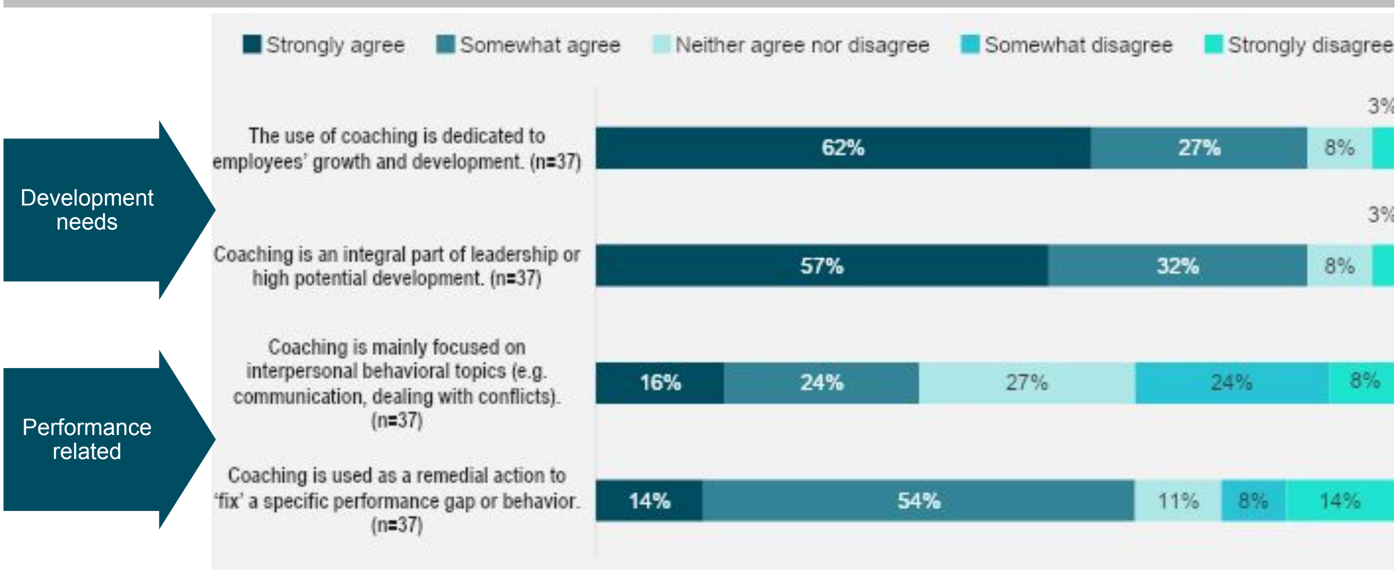
4.4 Expected Organizational Goals for Coaching

Coaching is primarily used for employees' growth and development as well as for the development of leaders and high potentials.

In the Philippines, almost 90% of CRs agree that coaching is primarily used for employees' growth and development (89%) as well as for the leadership and high potential development (89%).

There is still a moderate proportion of CRs who report that coaching is being used as tool for remedial action (68%).

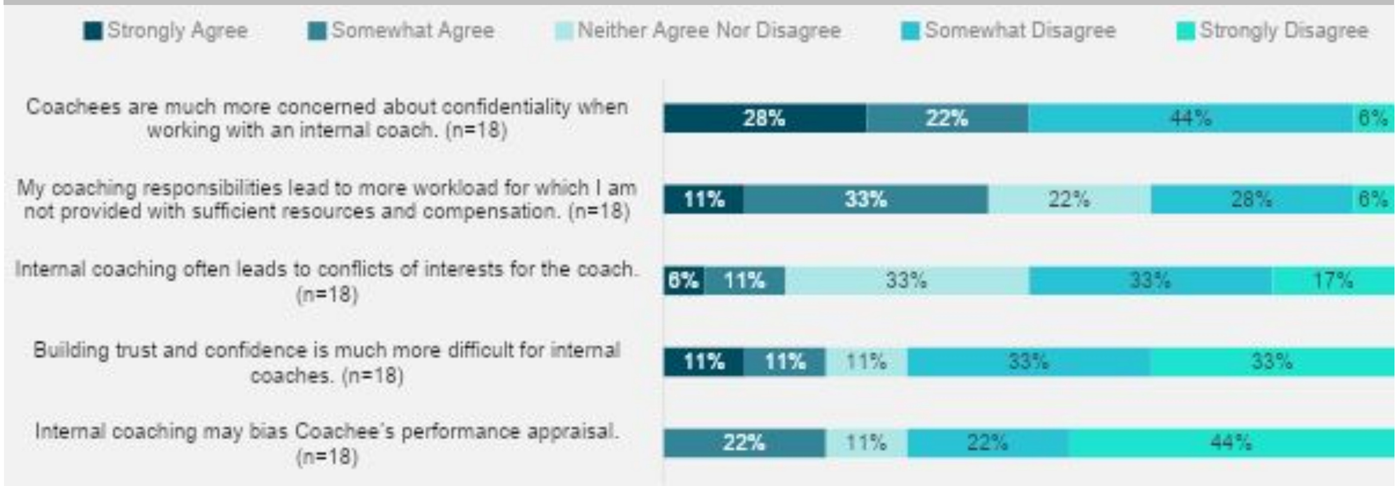
Q. Please indicate your level of agreement with the following statements on how coaching is used in your company.



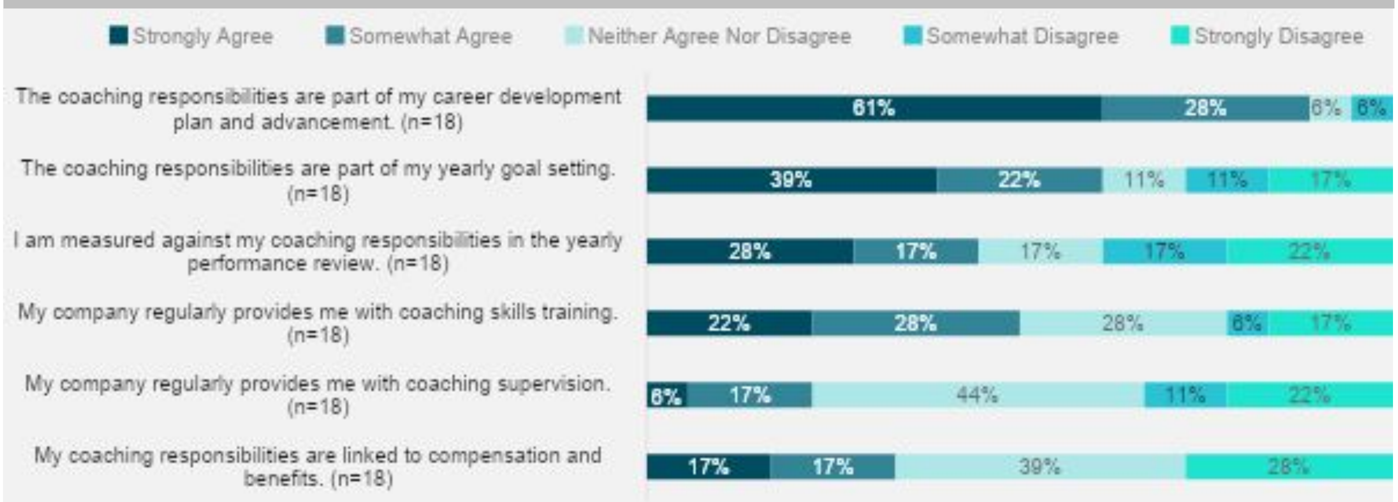
4.5 Opinion of Internal Coaches — Dynamics

While 89% of ICs agree that their coaching responsibilities are part of their career development, less than half think that it is part of the yearly performance review (45%), it is linked to compensation (36%), and that they are provided with coaching supervision (23%).

Q. Please rate your level of agreement with the following statements about internal coaching. (Internal Coaches)



Q. Please indicate the extent to which you agree with the following statements. (Internal Coaches)



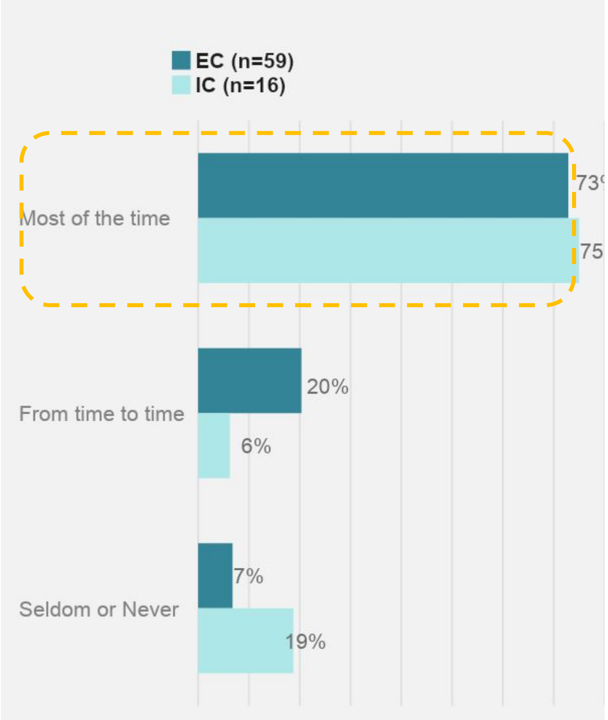
Something to ponder:

With internal coaching evolving as a role, what are the potential areas of development for ICs and companies?

4.6 Ethical Dilemmas Faced While Coaching

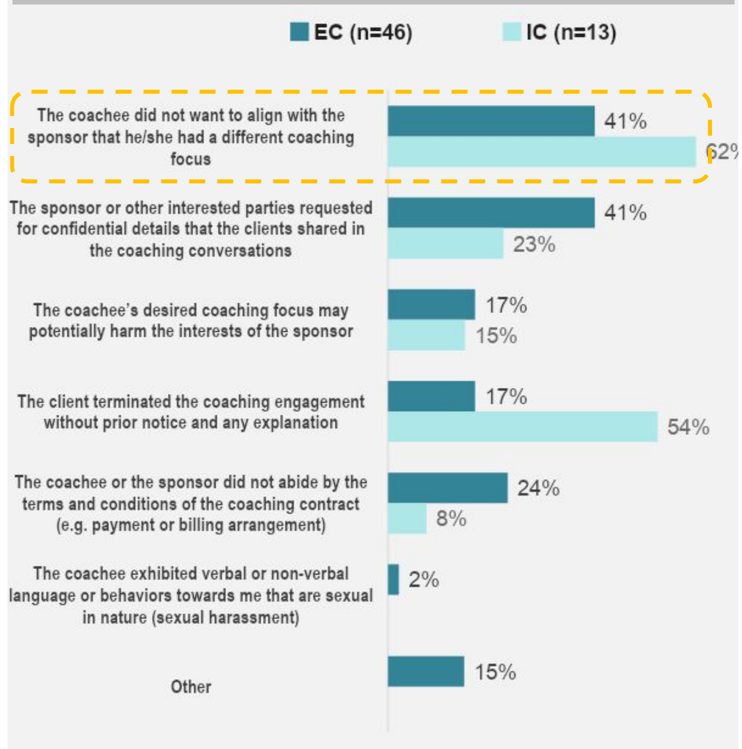
Most of the ECs and ICs share their ethical code with coachees.

Q. Do you share your coaching ethical code with your coachee at the start of the coaching assignment?



The ethical dilemma experienced by most ECs and ICs is around difference in coaching focus of Coachee vs Sponsor.

Q. What ethical dilemmas have you faced in your coaching practice? (Multiple Choice)



Philippine ECs and ICs report experiencing ethical dilemmas. The ethical dilemmas experienced by most ECs involve difference in coaching focus between coachee and sponsor (41%) and request for confidential details by sponsor or other interested parties (41%). The ethical dilemmas reported by most ICs include difference in coaching focus between coachee and sponsor (62%) and termination of coaching engagement without notice or explanation (54%).

Something to ponder:

Regarding the dilemma 'Coachee wants a different focus from the sponsor' – is this the evolving nature of coaching work or a misalignment between the sponsor and the coachee? How can coaches creatively manage the tripartite relationship with sponsors while serving the needs of their coachee?

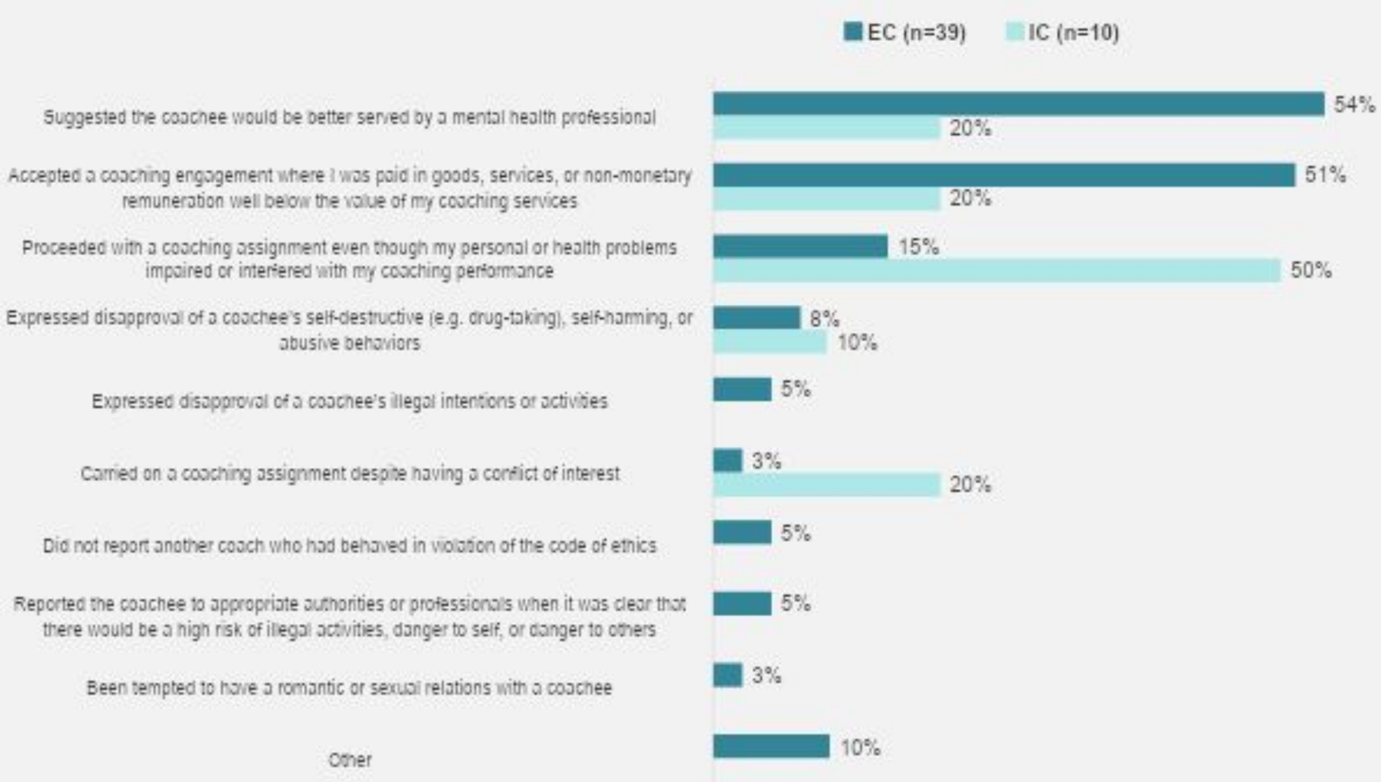
4.7 Difficult Situations Experienced While Coaching

ECs and ICs report some of the difficult situations that they have experienced. A surprising number of ECs (54%) have suggested that a coachee consult a mental health professional. This speaks of the lack of public awareness about treatment options for mental health problems and/or rising cases of mental health issues.

One in two Philippine ECs have had to suggest that their coachee will be better served by mental health professional and was compensated well below the value of the coaching service. One in two ICs difficult proceeded with a coaching assignment despite personal or health problems.

One "Other" difficult situation reported by an EC is refraining from volunteering other consulting services when the need for them arises in the conversation.

Q. What difficult situations have you experienced in your coaching practice? (Multiple Choice)



Something to ponder:

Does the high percentage referral to mental health professional speak of the rising cases of stress or a lack of awareness of mental health (both coach and coachee)? How equipped are coaches in facing difficult situations like these?
What factors could potentially cause differences in ICs and ECs experience of difficult situations?

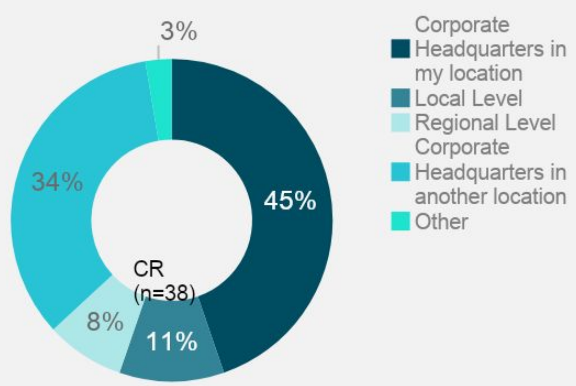
5

Coaches' Selection and Credentials

5.1 Setting Up Coaching Interventions

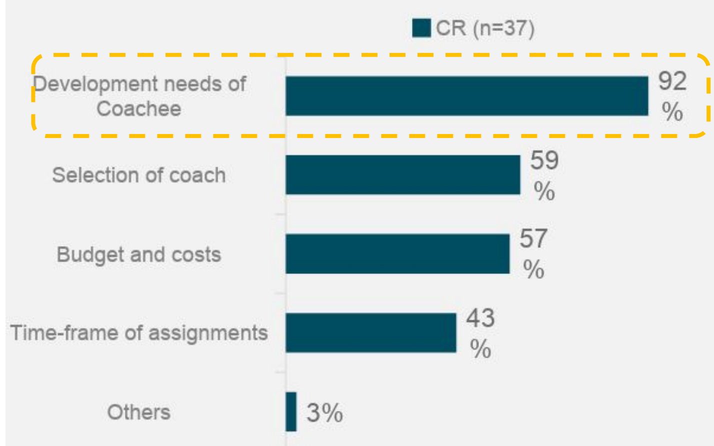
66% of decisions are made either at HQ in Coaches' Location or at Local Level

Q. At what level is the decision made to initiate the coaching interventions in your company?



Development needs of Coachees is the most important area that is considered for setting up coaching assignments

Q. Please indicate the areas that are considered when setting up coaching assignments. (Multiple Choice)



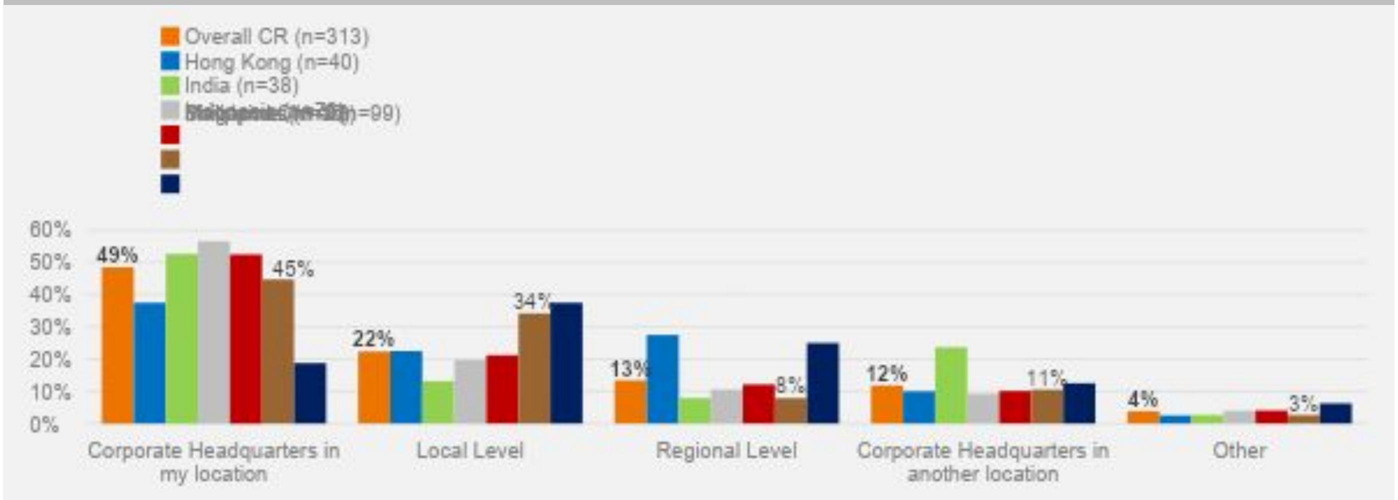
Something to ponder:

The focus on the development needs of coachee when setting up coaching assignments may be symbolic of a growing awareness of the value of people development.

5.1 Setting Up Coaching Interventions – cont.

Coaching interventions can be set up by corporate, local or regional.

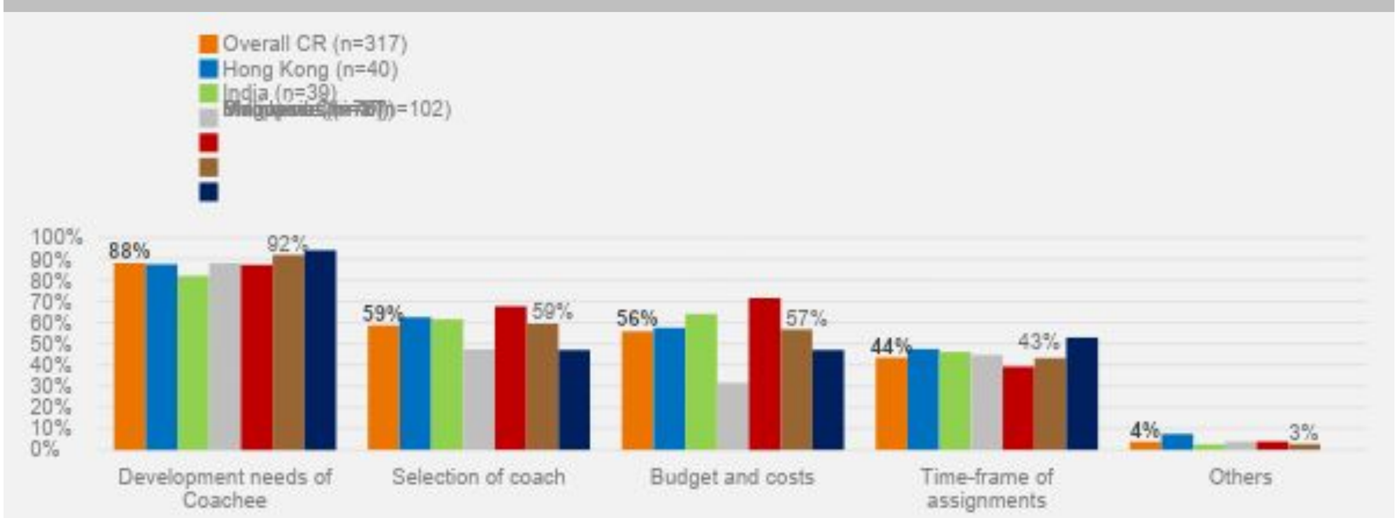
Q. At what level is the decision made to initiate the coaching interventions in your company? (Multiple Choice)



In the 2017 Survey, similar observation where Corporate headquarters were mainly responsible for setting up the coaching process

Consistently in all markets, development needs of coachee is the key consideration when setting up coaching assignments.

Q. Please indicate the areas that are considered when setting up coaching assignments. (Multiple Choice)

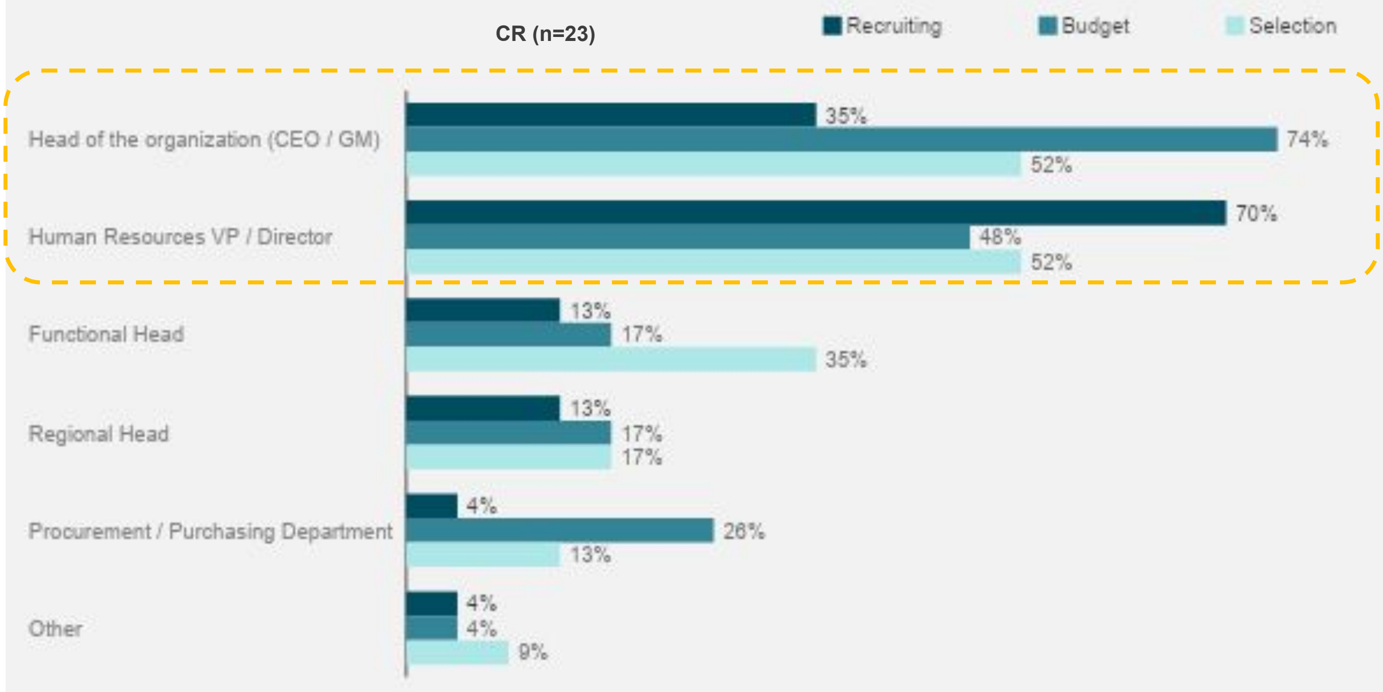


In the 2017 Survey, “Time-frame of assignments” and “Selection of Coach” were the two most important factors respectively.

5.2 Decision Makers for Coach Recruitment

While the Budget is determined by the Head of Organization, the Recruiting of ECs is primarily done by the HR Head, but the Selection of ECs is decided by both. The Functional Head is also involved in the Selection process.

Q. Who is involved in the external coaches' recruitment process? (Multiple Choice)



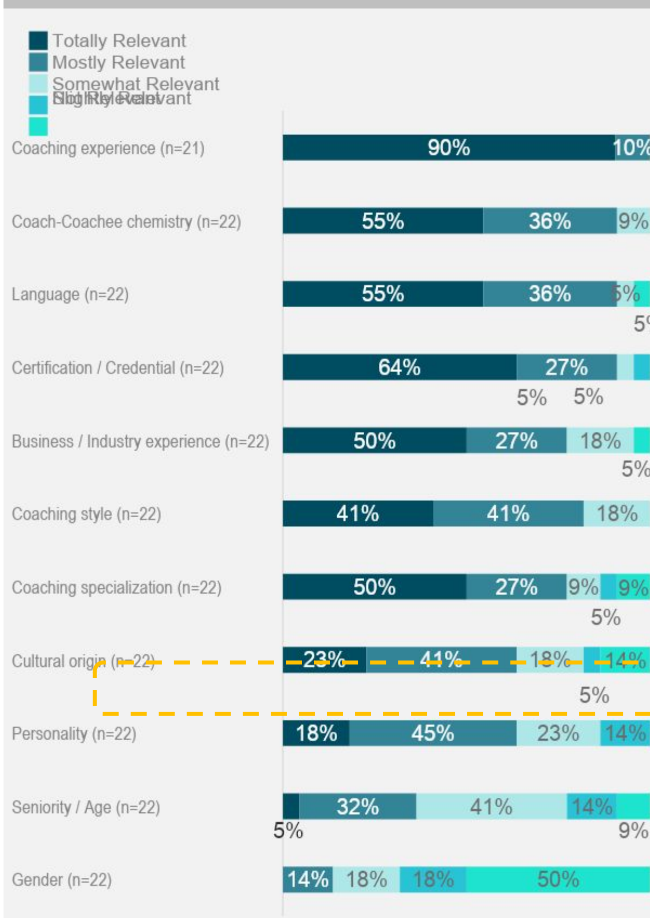
5.3 Selection Criteria for Hiring External Coaches

CRs and ECs are aligned on the criteria for selection of external coaches.

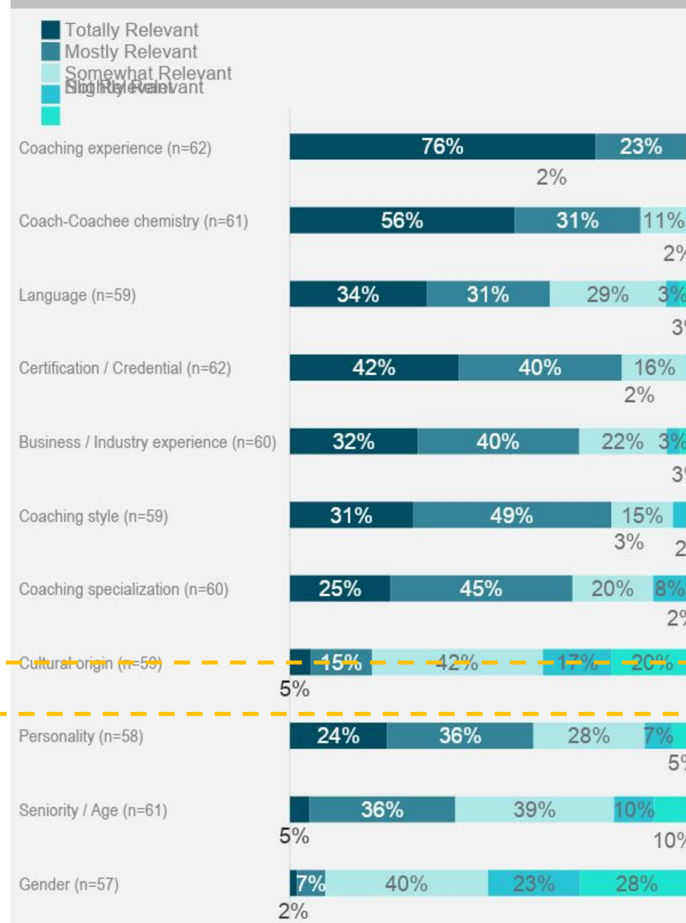
Philippine companies and ECs consider most of the criteria relevant in external coach selection, except for Gender. The top four criteria are Experience, Chemistry, Credentials and Language.

There is some divergence on "Cultural Origin" expectations. CRs regard it of greater relevance than ECs.

Q. How relevant are the following criteria when selecting external coaches? (Company Representative)



Q. How relevant are these criteria to companies when selecting external coaches? (External Coach)



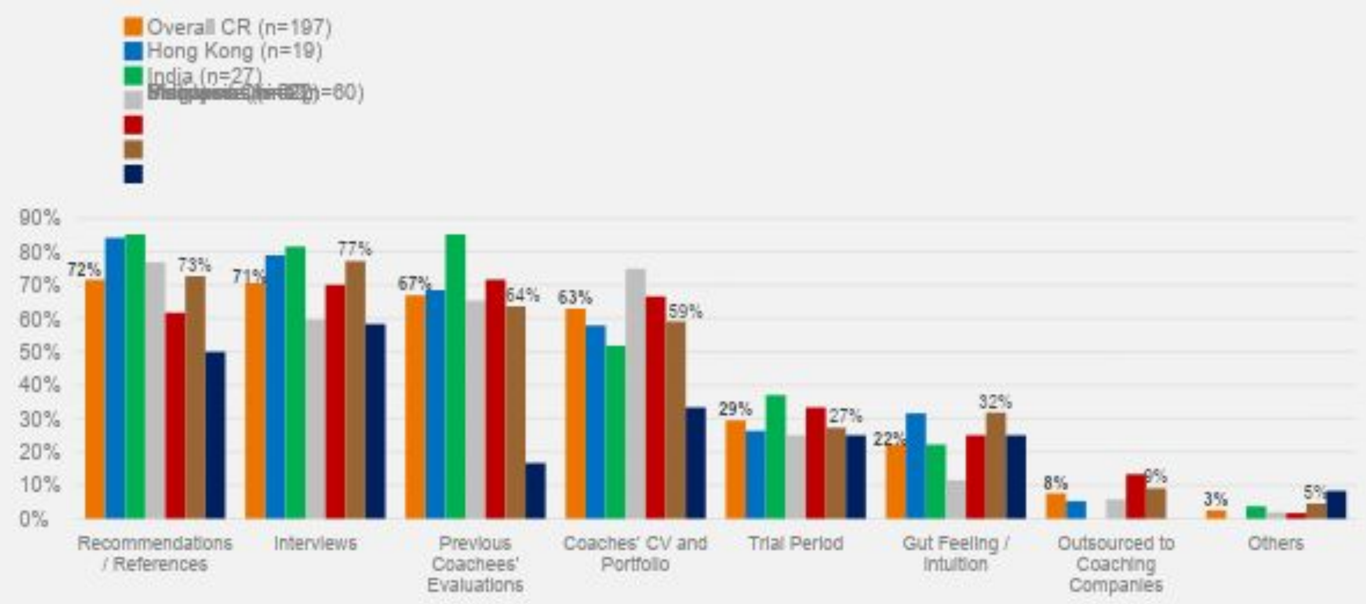
Something to ponder:

Since the no. 1 selection criteria is coaching experience, is it possible that the request of credentials apply more to new entrants than seasoned coaches?

5.4 Assessment of External Coach Candidates

The top 3 methods of assessment of ECs for all markets are Recommendations/References and Interviews, and Previous Coachees' Evaluations.

Q. How do you assess the qualification and skills of external coach candidates? (Multiple Choice)

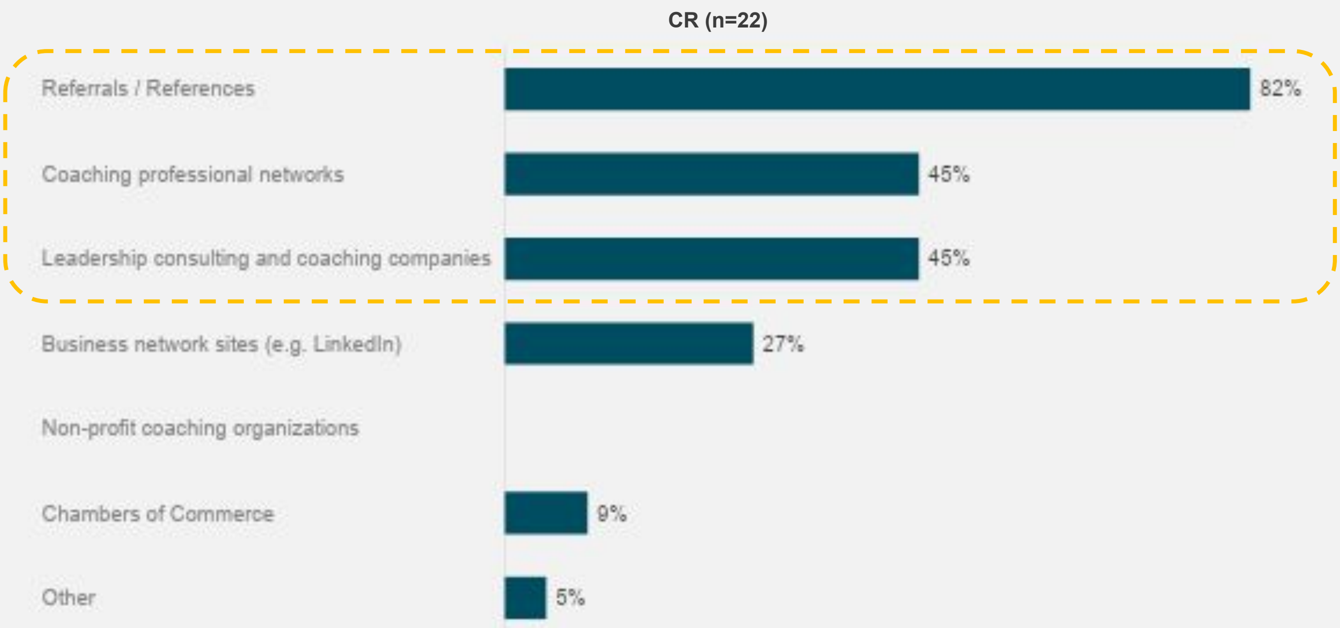


In the 2017 Survey, Companies brought out Interviews, Coaches' CV and portfolio and the Feedback from Coachees as main tools for assessing EC.

5.5 Channels for Hiring External Coaches

Referrals, Network and Coaching Companies are leading channels for recruitment of coaches

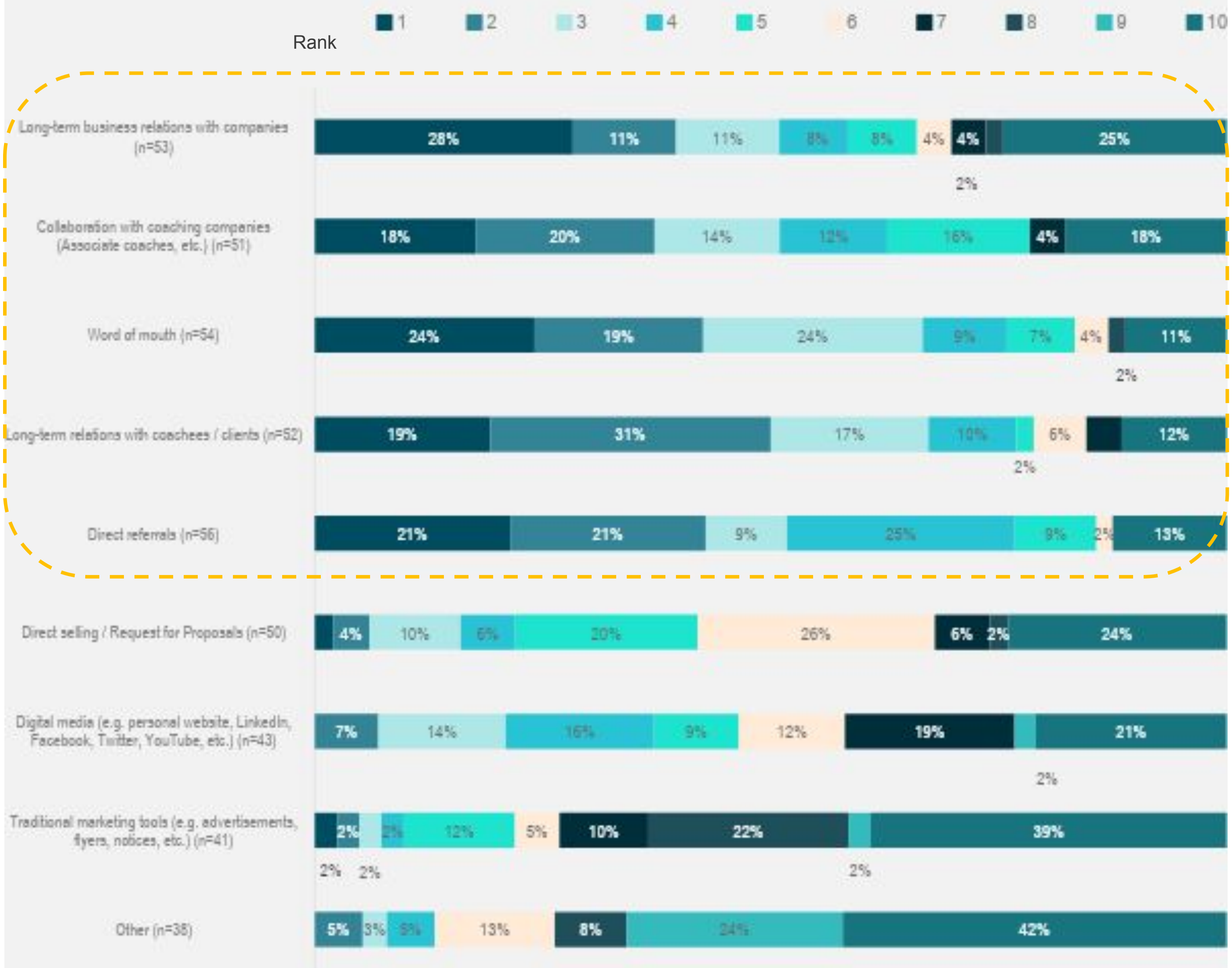
Q. Which channels do you use to recruit external coaches? (Multiple Choice)



5.5 Channels for Hiring External Coaches – cont.

The top five channels include Relationships with clients & coachees, Word of mouth, Long-term business relations with companies, Collaboration with coaching companies, and Direct Referrals. Coaches focus more on relationships than direct marketing to win coaching assignments.

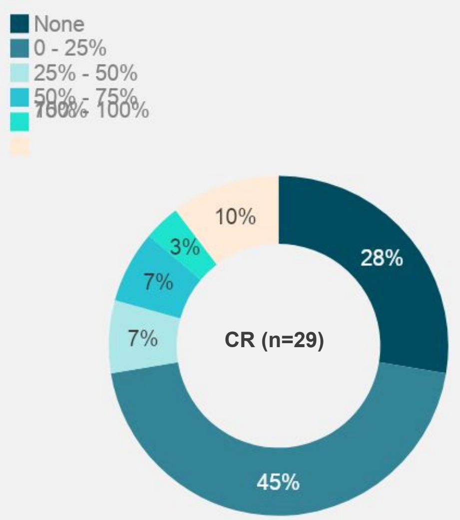
Q. Please select and rank the channels by which you won your coaching assignments in 2017-2018.



5.6 Local Pool and Cultural Origin of Coaches

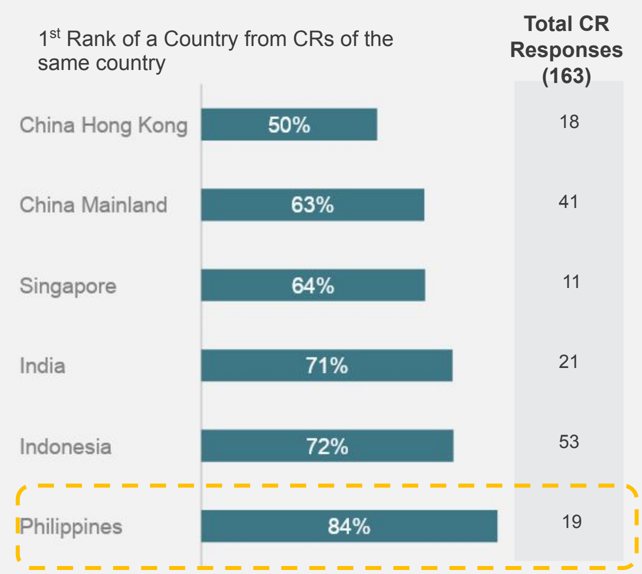
Only 10% of CRs report that their ECs are based solely in their market location, whereas the other companies use from other markets, too.

Q. What percentage of the external coaches your company uses are based in your market location?



Significant number of companies from Hong Kong and Mainland China have coaches from other markets.

Q. Please rank the cultural origins of your external coaches.



5.7 Cultural Origins of EC

Organizations mainly choose ECs coming from the same cultural origin as their market, followed by ECs from Singapore, Europe and US.

Q. Please select the top three cultural origins of your external coaches.

Origin of Coaches

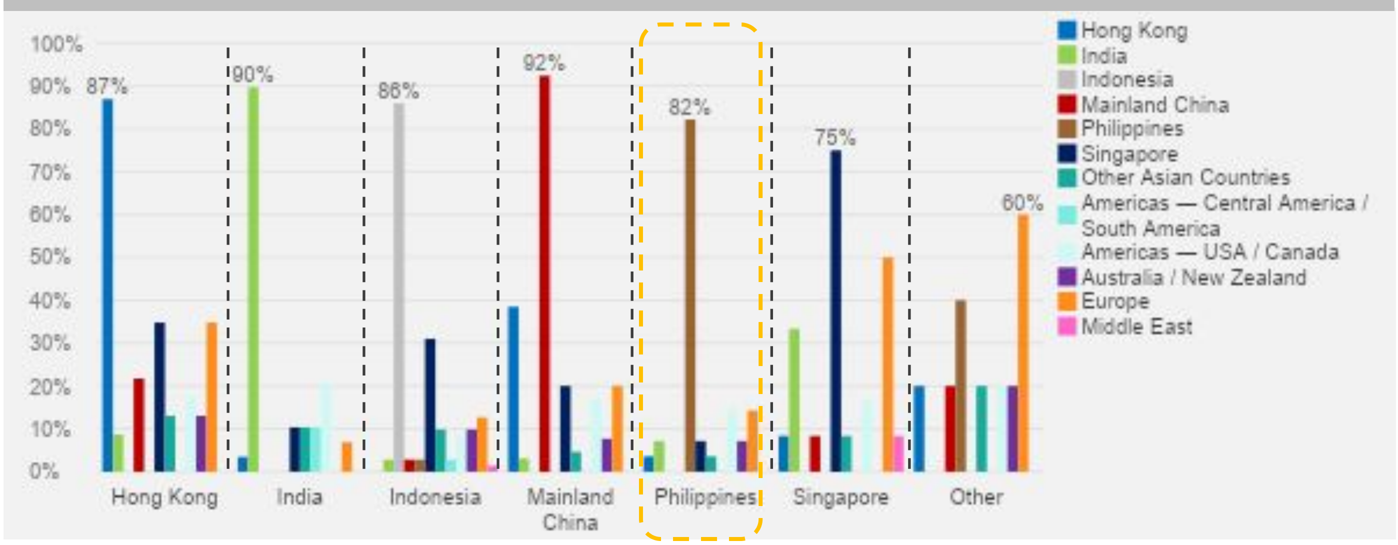
Origin of Organizations	Hong Kong	India	Indon-esi a	Mainland China	Philipp-ine s	Singap-or e	Other Asian Markets	Africa	Americas — Central or South America	USA / Canada	Australia / New Zealand	Europe	Middle East
Hong Kong (n=23)	87%	9%	0%	22%	0%	35%	13%	4%	0%	17%	13%	35%	0%
India (n=29)	3%	90%	0%	0%	0%	10%	10%	3%	10%	21%	0%	7%	0%
Indonesia (n=71)	0%	3%	86%	3%	3%	31%	10%	0%	3%	8%	10%	13%	1%
Mainland China (n=65)	38%	3%	0%	92%	0%	20%	5%	0%	0%	17%	8%	20%	0%
Philippines (n=28)	4%	7%	0%	0%	82%	7%	4%	0%	0%	14%	7%	14%	0%
Singapore (n=12)	8%	33%	0%	8%	0%	75%	8%	0%	0%	17%	0%	50%	8%

2nd Highest selection

3rd Highest selection

The local pool of Coaches is the most utilized in all markets.

Q. Please select the top three cultural origins of your external coaches.



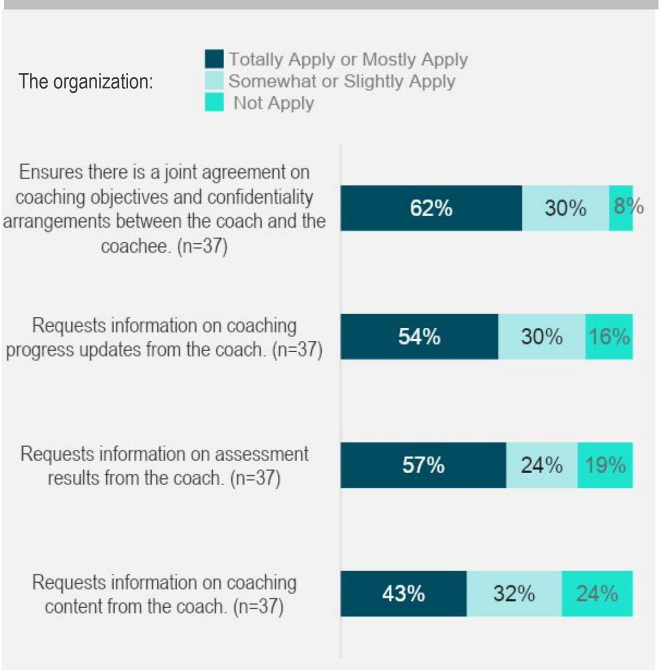
5.8 Coaching Process Setup

While companies say they remain more involved, the experience of EC and IC brings out less involvement on Coaching Progress, Assessment Results and Coaching content.

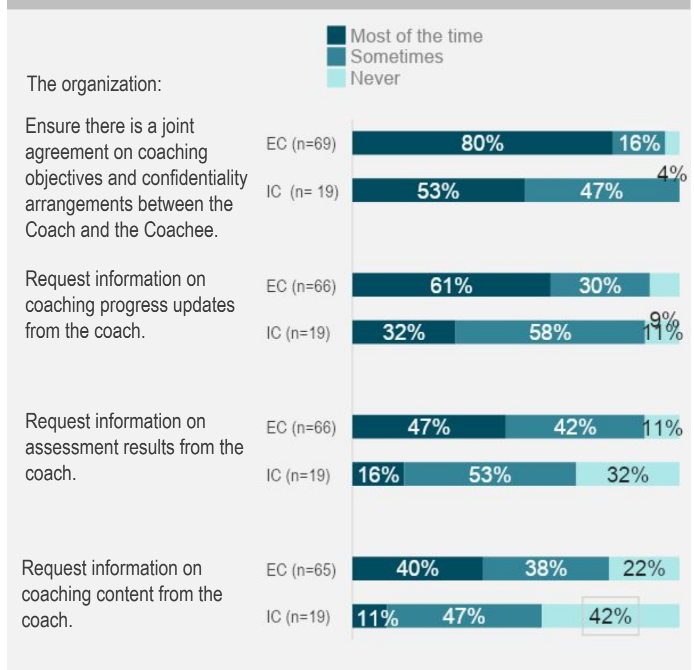
The “boundaries” of the coaching process set-up is a work in progress.

While it is encouraging that a majority of Philippine companies and coaches indicated there are joint agreements on coaching objectives and confidentiality arrangements and requests for coaching progress updates, it is also important to note that majority also indicated that companies request for coachees’ assessment results and coaching content from the coaches.

Q. To what extent do the following statements apply to your company?



Q. To what extent do the following statements apply to the companies you work with?



Something to ponder:

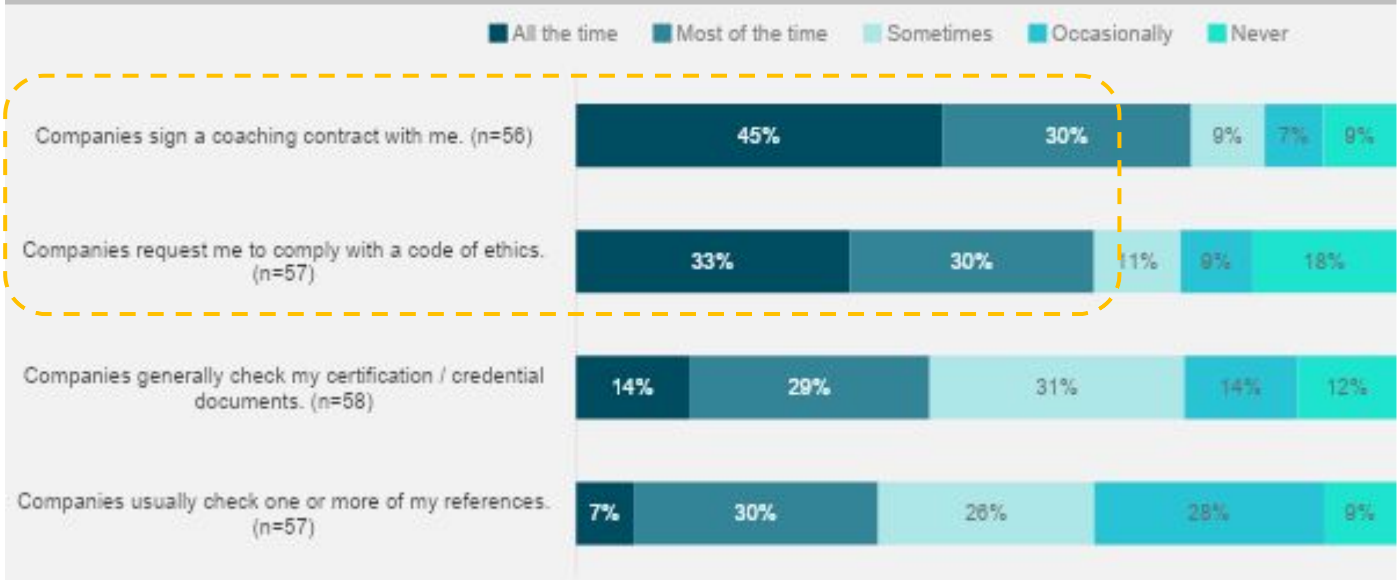
This points to the complexity of setting up the coaching process in an Asian context. In an environment of perhaps a hierarchical structure of relationships leading to fluid boundaries, how do coaches uphold the ethics of coaching?

5.9 Process Compliance By Organizations

Most organizations require a high level of compliance on signing coaching contracts and code of ethics.

According to ECs, majority of Philippine companies require signing of coaching contracts and compliance with a code of ethics, while they seem to be paying less attention on checking coaches' credentials and references.

Q. Please indicate the extent to which the following statements hold true? (External Coach)



5.10 Coaching Process Practices

Certificates and credentials seem to be more important for companies than self-paying individuals.

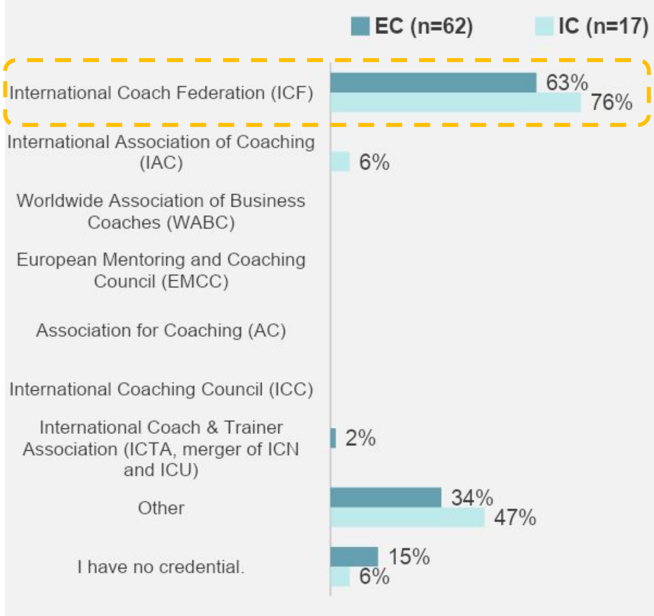
Majority of Philippine ECs report that certificates and credentials are very important to gain access to new companies and coachees. A moderate number claim that they would usually go through a coach/coachee matching process and a coaching interview with company representatives. Self paying coachees seem to care less about checking on credentials and certification of coaches.

Q. Please indicate the extent to which the following statements hold true? (EC)

5.11 Credentialing Body

Majority of Coaches have accreditation from ICF.

Q. Who is your credentialing body?



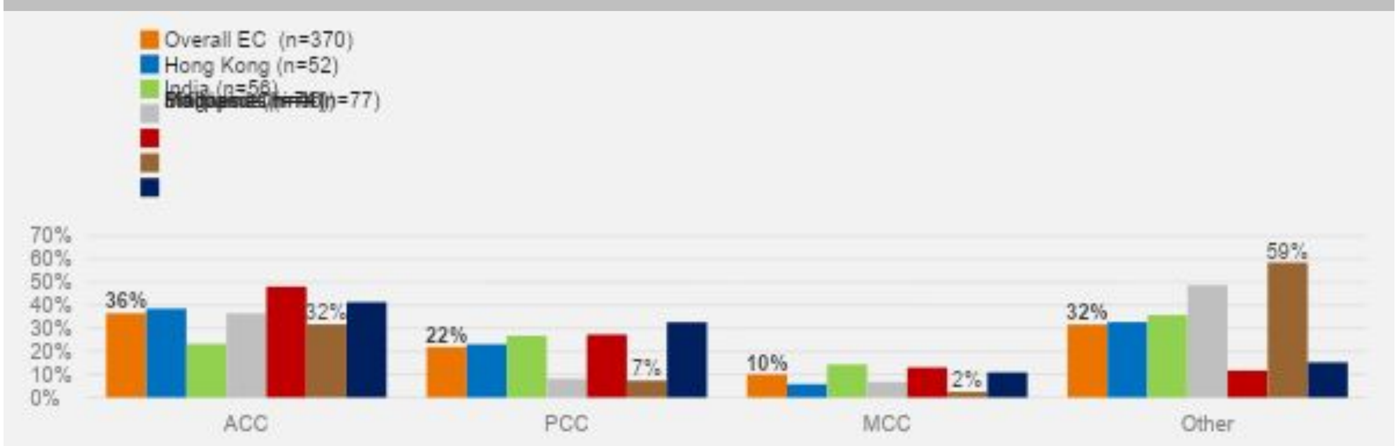
Q. What is your credential level?

EC (number)	ACC	PCC	MCC	Other	Total
Hong Kong	20	12	3	17	52
India	13	15	8	20	56
Indonesia	27	6	5	36	74
Mainland China	37	21	10	9	77
Philippines	13	3	1	24	41
Singapore	19	15	5	7	46
Other	6	9	5	4	24

IC (number)	ACC	PCC	MCC	Other	Total
Hong Kong	2	0	0	2	4
India	0	1	1	1	3
Indonesia	4	0	0	15	19
Mainland China	3	3	0	6	12
Philippines	4	1	0	1	6
Singapore	2	2	0	0	4
Other	0	0	0	2	2

Majority of ECs in the Philippines and Indonesia as well as a fair number of coaches in other markets have received non-ICF credentials.

Q. What is your credential level?

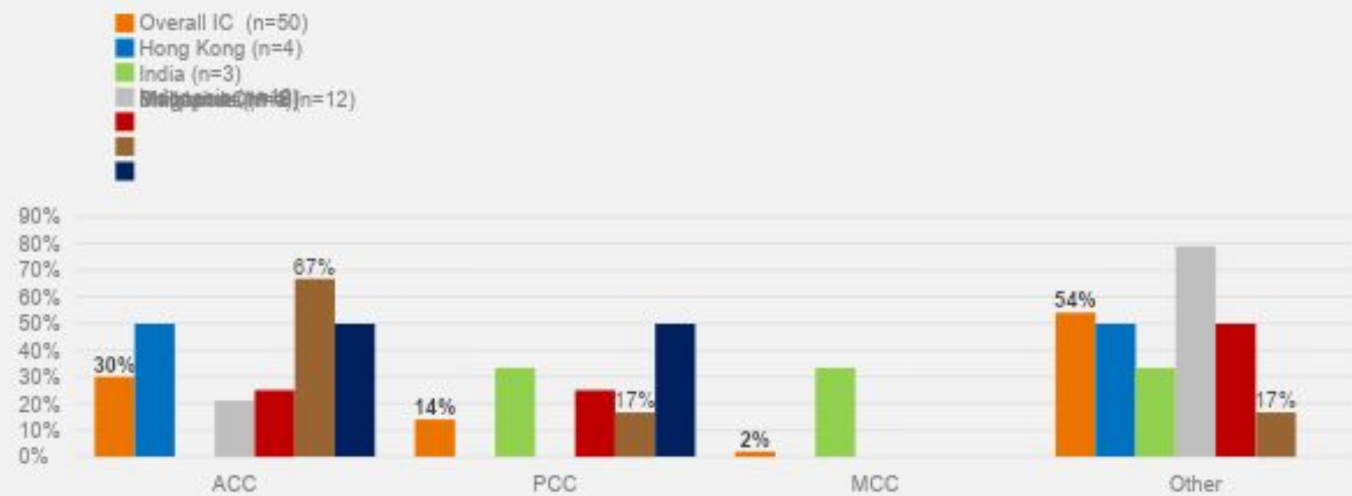


In the 2017 Survey, about 50% of coaches in India and China are accredited at PCC level while the majority of accredited coaches in HK have ACC credentials.

5.11 Credentialing Body – cont.

ICs in general obtained a lower credential level compared to ECs except for India

Q. What is your credential level?



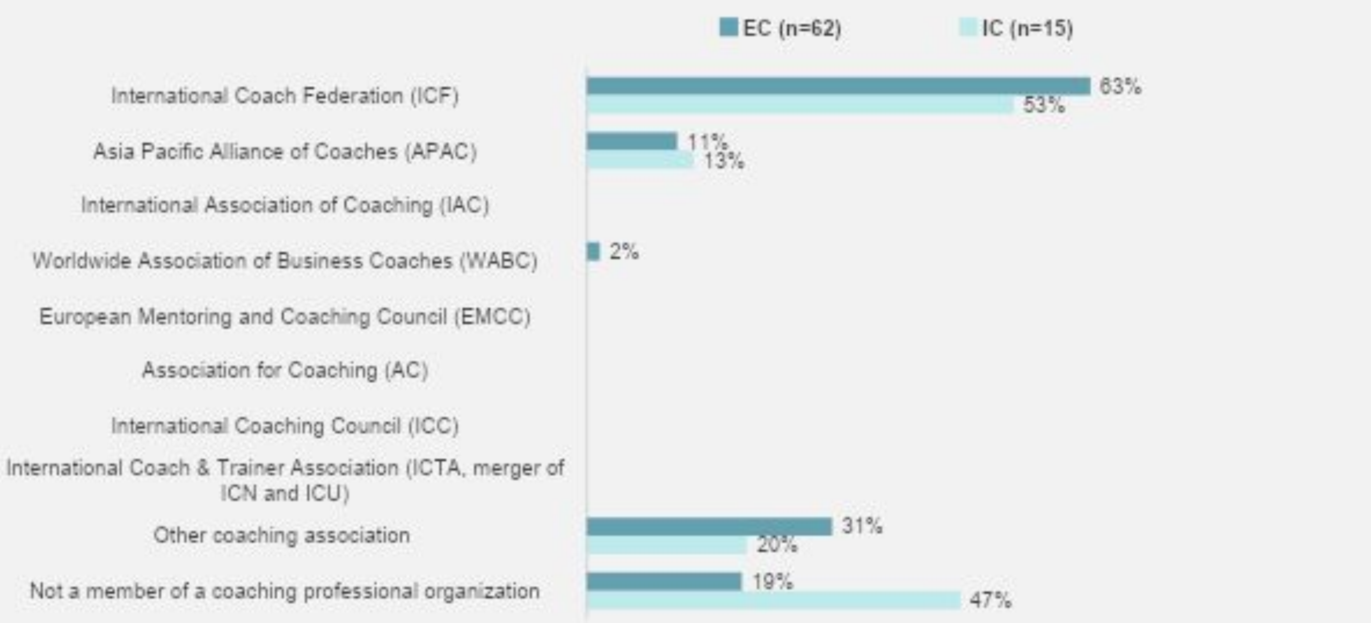
5.12 Membership of Coaching Associations

Majority of ECs & ICs are members of ICF. 47% of ICs are not members of any coaching professional organization.

ICF continues to be the leading professional coaching association. APAC is the second largest coaching association for Philippine coaches.

Almost half of the ICs are not members of a coaching organization.

Q. Are you a member of any of the following coaching associations? (Multiple Choice)



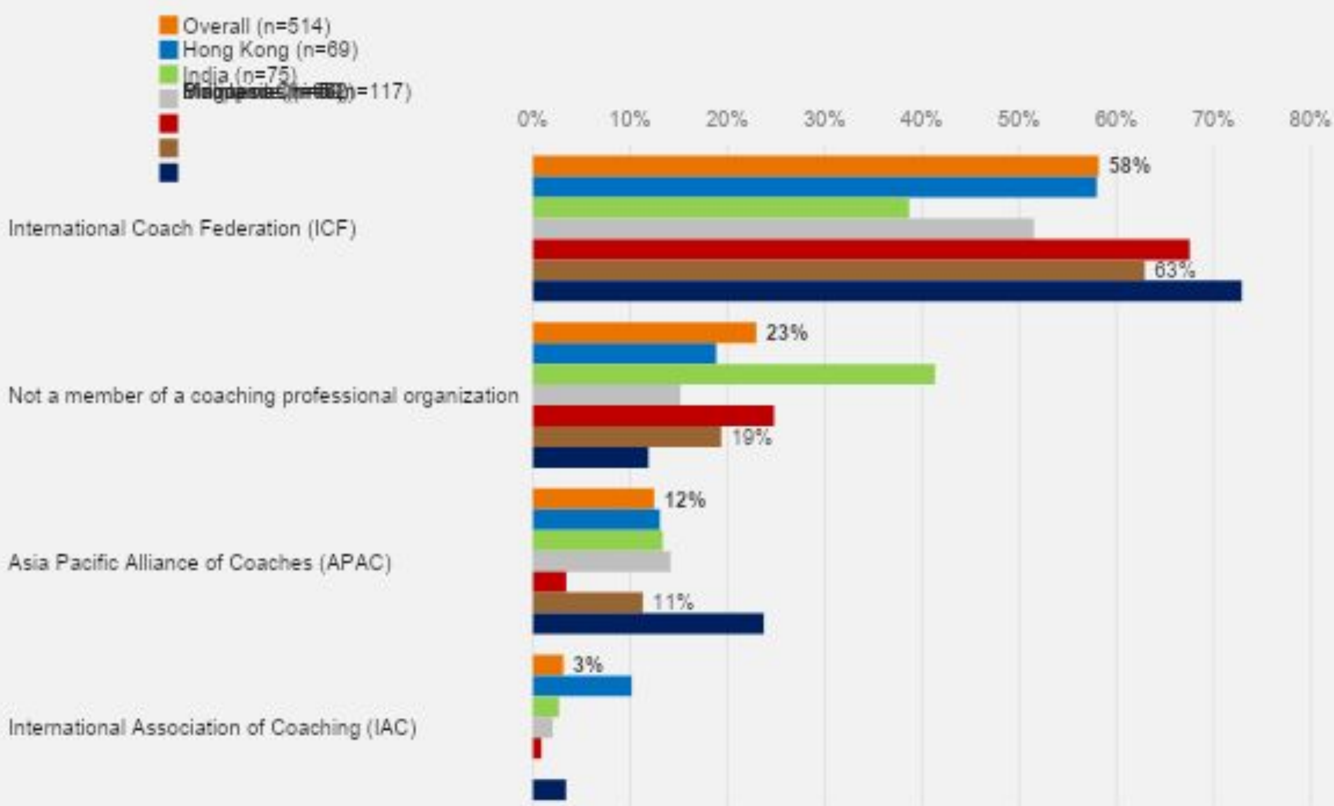
Something to ponder:

Why are very few ICs joining coaching associations? What will attract them to join professional coaching associations?

5.12 Membership of Coaching Associations — By Market

ICF is still the leading coaching association for ECs in all markets.

Q. Are you a member of any of the following coaching associations?(Multiple Choice)



In the 2017 Survey, ICF was the leading professional coaching association with 53%, followed by APAC with 16%. 32% were not part of any coaching professional organizations.

6
Coaching Evaluation and Diagnosis

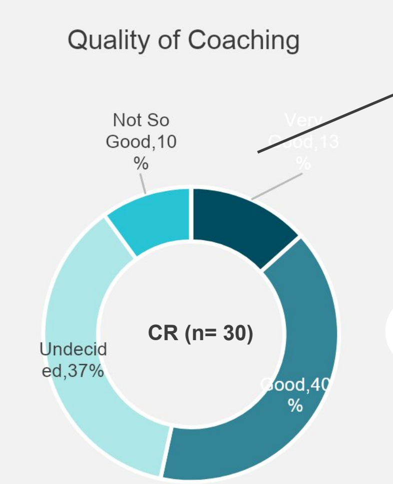
6.1 Evaluation of Coaching Quality

37% of organizations are undecided on the quality of coaching. Majority of companies agreed to focus on all factors listed below for further improvement for effectiveness.

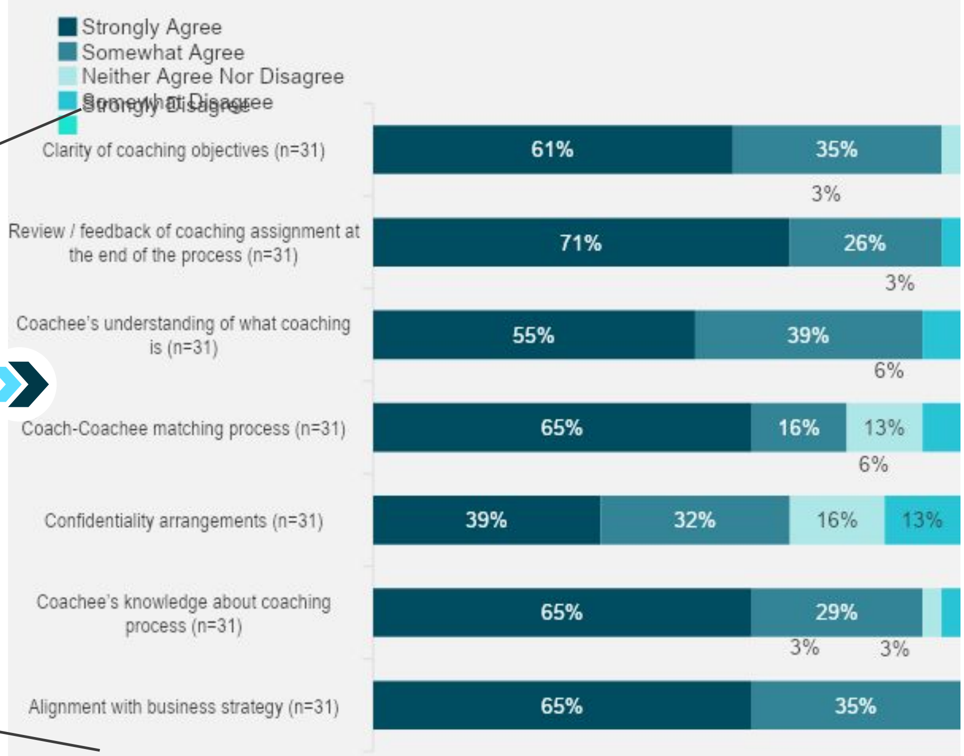
Half of Philippine CRs evaluate the overall quality of coaching services as "Very Good" and "Good".

Companies ask coaches to pay attention to literally all the factors listed for further improvement. The top three areas for improvement are Alignment with business strategy (100%), Review of the coaching assignment at the end of the process (97%), and Clarity of coaching objectives (96%).

Q. How would you evaluate the overall quality of coaching services in your company?



Q. What could be improved to make the coaching process even more effective?



Something to ponder:

How can the suggested improvements create a shift in the perceived quality of coaching, level of client satisfaction and raise the impact of coaching?

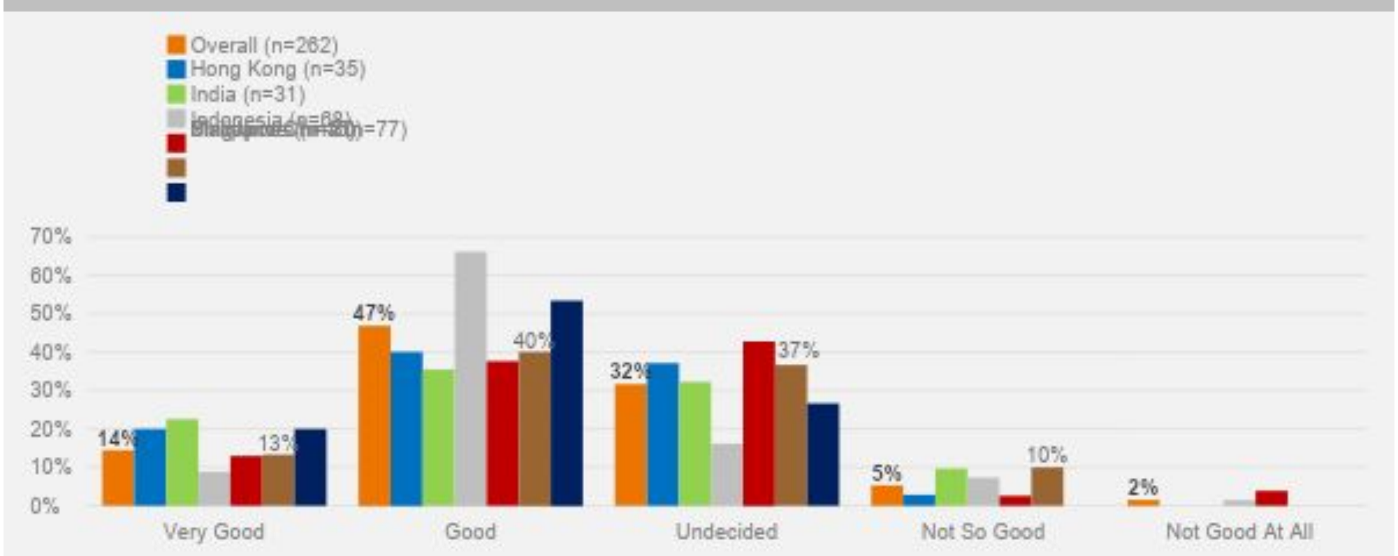
6.1 Evaluation of Coaching Quality – cont.

Overall Quality of coaching services rated Very good and Good is 61%, Undecided is 32% while Not so good and Not very good is around 7%. Indonesia and Singapore have over 70% rating for Very Good and Good services while the rest ranges between 50-60%

When we look at the market data, Indonesia and Singapore have over 70% rated 'Very Good' and 'Good' services while the rest of the markets range between 50-60%.

In the 2017 Survey, 83% in India, 66% in China and 54% in HK rated services 'Good' and 'Very Good'. In this survey, India has experienced a drop of 20%, HK dropped slightly while China stayed consistent.

Q. How would you evaluate the overall quality of coaching services in your company?



In the 2017 Survey, a similar pattern was observed. 83% in India, 66% in China and 54% in HK rated services 'Good' and 'Very Good'.

Something to ponder:

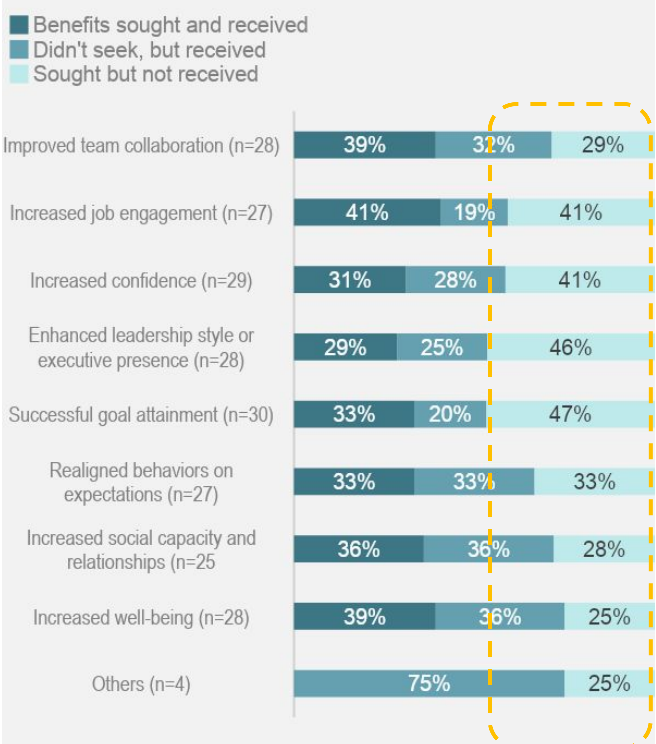
32% 'Undecided' is a relatively big percentage. What could be the reasons for this?

6.2 Coaching Benefits — Expectations vs. Delivery

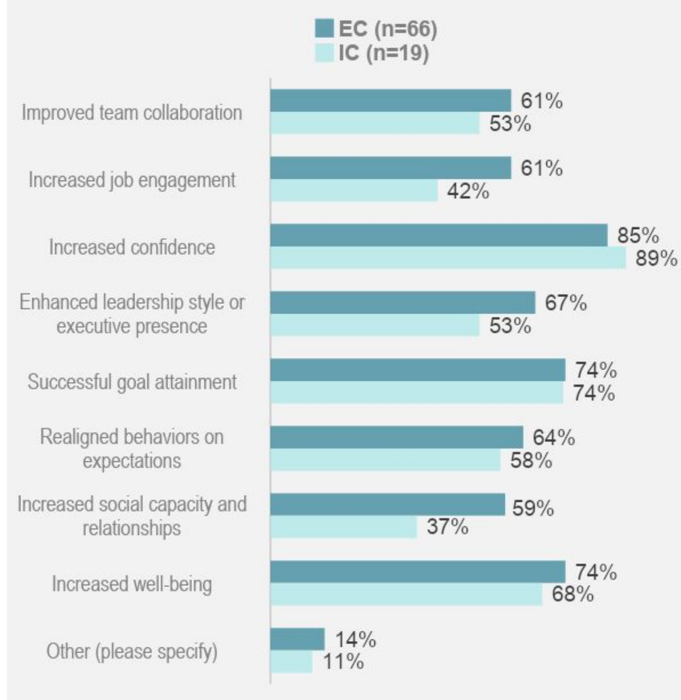
There is significant divergence between perceptions of Companies vs Coaches in terms of benefits achieved from coaching services.

Approximately 36% of organizations did not receive benefits that they sought, while another 29% received benefits that they did not seek. When the CR data is compared to those of ECs and ICs, there seems to be differences in companies’ and coaches’ perceptions of the coaching benefits achieved. Could this be the clue of the earlier 32% ‘Undecided’ ratings companies gave for coaching quality?

Q. What were some of the benefits your company sought and gained after providing coaching assignments for employees?



Q. What are the main benefits your clients report they experience after participating in a coaching assignment?



Something to ponder:

What could be leading to the discrepancy of benefits sought and received? How do we close this gap and increase the perceived quality of coaching services?
To answer this, we may need to understand the level of clarity on the benefits of coaching for both companies & coaches, adequacy of articulation and communication of coaching benefits during contracting as well as throughout the coaching process.

6.3 Usage of Evaluation Tools To Measure Success of Coaching

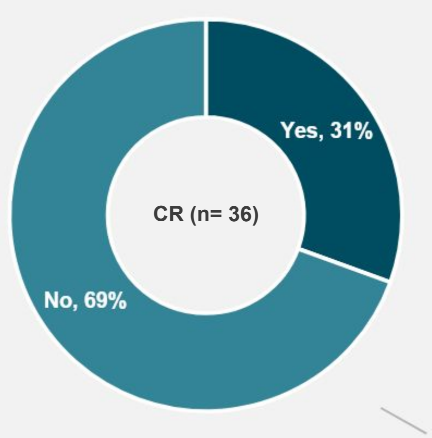
There is a marked difference in the usage of evaluation tools by Organizations vs Coaches.

Only 31% of Philippine Companies use evaluation tools to measure the success of coaching while 69% of the Companies do not use evaluation tools.

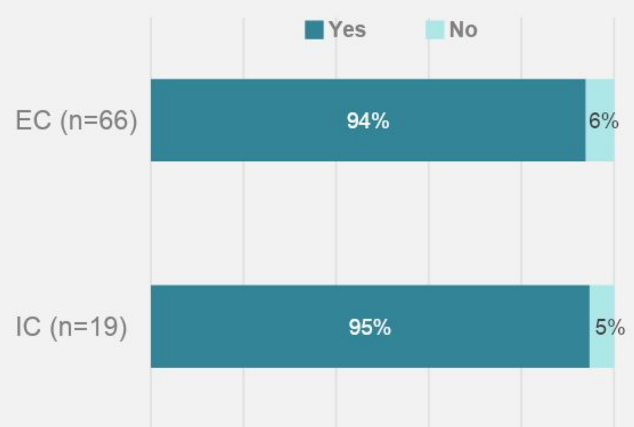
Measuring the success of coaching is ambiguous as there are many variables involved; including multiple stakeholders, complex business context, environment and so on.

Coaches are usually accountable for sharing feedback about the coaching process with companies. This could explain why companies may see a lesser need to conduct evaluation directly.

Q. Do you use any evaluation tool to measure the success of coaching? (CR)



Q. Do you use any evaluation tool to measure the success of coaching? (EC/IC)

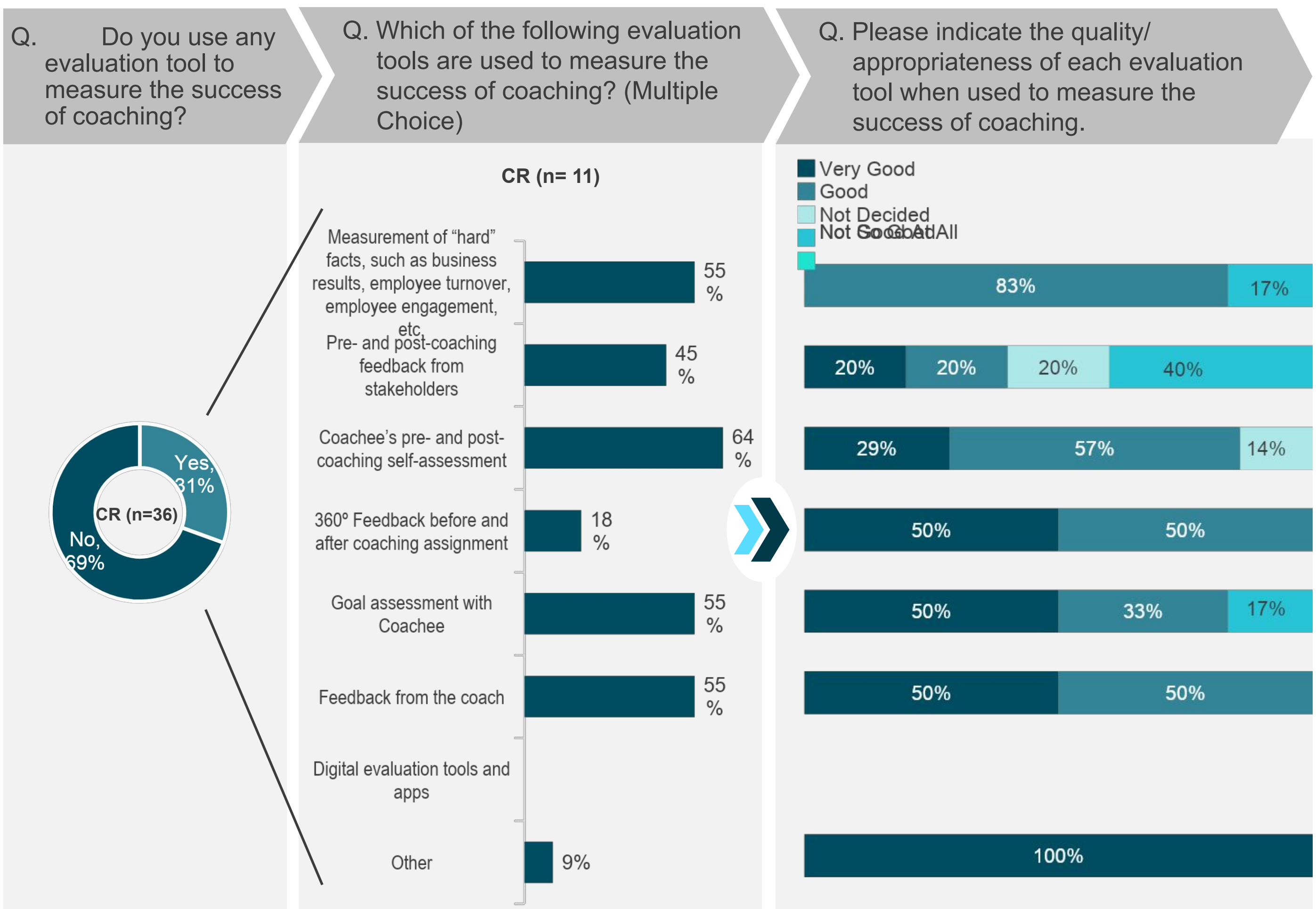


6.4 Measurement of Coaching Success

While only 31% companies use an evaluation tool to measure success of coaching, they are mostly happy with the quality and appropriateness of the tools.

Of the 31% Philippine companies that use evaluation tools, more than half measure pre- and post-coaching assessment by coachee (64%) ,'hard' facts such as business results (55%), goal assessment with coachee (55%) and Coach's feedback (55%). Majority of them consider the quality of these evaluation tools "Very Good" or "Good" (83% to 100%). It is interesting to note that the evaluation tool that is the least used, 360 Feedback before and after coaching assignment (18%) received one of the highest quality ratings (100%).

No company has indicated using Digital evaluation tool and apps. The "Other" evaluation tool that was rated "Very Good" was the Individual Development Plan.



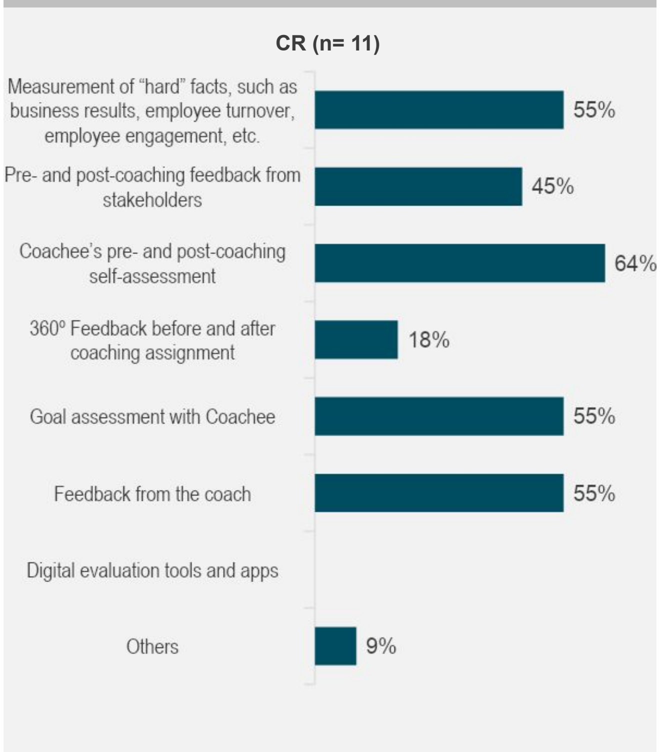
6.4 Measurement of Coaching Success – cont.

There is a marked difference in the way Companies assess success of coaching vs. the way Coaches do. However, neither Companies nor Coaches rely much on digital evaluation tools.

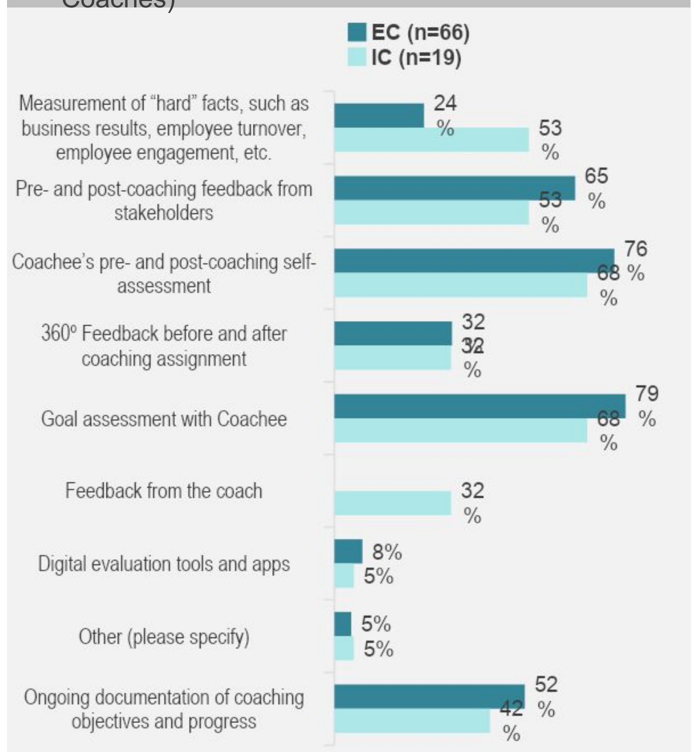
Philippine companies and ICs that use evaluation tools value hard facts almost as much as soft data in the measurement of coaching success while External Coaches tend to focus on soft data.

About 52% of ECs and 42% of ICs indicate that they document coaching objectives and progress on an on-going basis. A very small percentage of ECs (8%) and ICs (5%) use digital evaluation tools and apps.

Q. Which of the following evaluation tools are used to measure the success of coaching? (Company Representative)



Q. Which of the following evaluation tools do you use to measure the success/impact of your coaching assignments? (External and Internal Coaches)



Something to ponder:

What do coaches need to focus on regarding measurement of coaching success to make the benefits more known to companies? How do we link what we measure to business results or 'hard' facts, to make coaching meaningful and relevant to Companies?

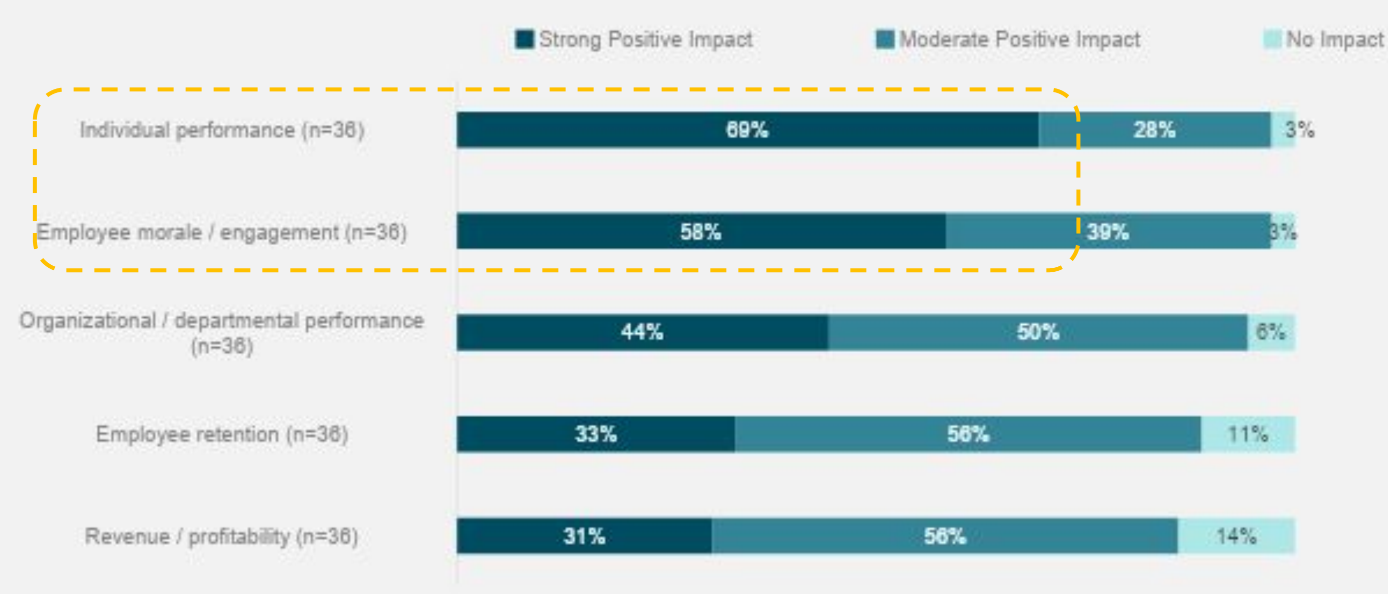
6.4 Measurement of Coaching Success – cont.

CRs observe a strong positive impact on individual performance and employee engagement while moderate positive impact on revenue and profitability (bottom line). Only 14% reported no impact on bottom line.

Majority of Philippine Companies report strong or moderate positive impact of coaching on their business bottom line such as revenue / profitability (86%).

According to Companies, coaching seems to have a strong positive impact on individual performance and employee morale/engagement. Organizational/departmental performance, employee retention and revenue/profitability received moderate positive impact ratings.

Q. In your experience, how does coaching impact the following company metrics?



7
Coaches' Professional Development

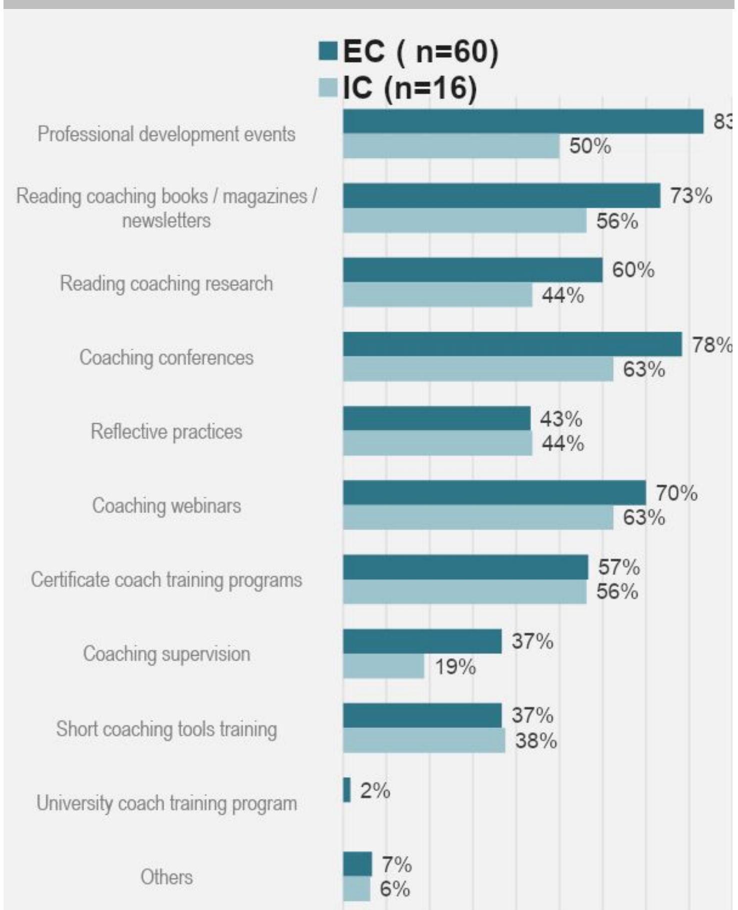
7.1 Professional Development of Coaches — Practices and Time Spent

Coaches leverage multiple forms of professional development

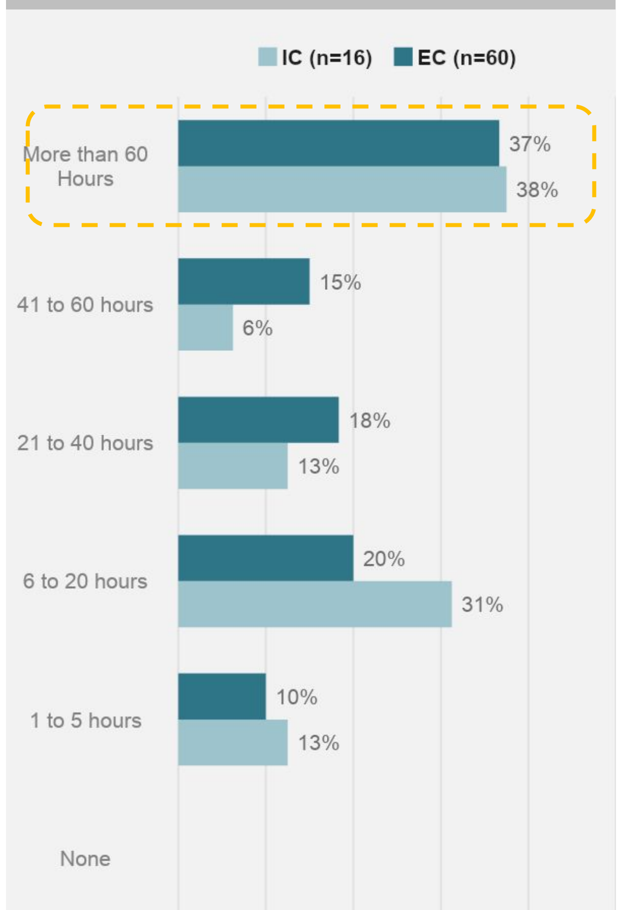
An equal proportion of Philippine ECs (37%) and ICs (38%) spend 60 hours or more per annum on continuous professional development.

Attending professional development events (83%), attending coaching conferences (78%), and reading coaching books or other materials (73%) are three of the top-rated professional development activities by ECs. For the ICs, they attend coaching conferences (63%), webinars (63%), Certificate coach training programs (56%) and read books or other materials (56%) for their continuous professional development.

Q. What forms of continuous professional development do you engage in?



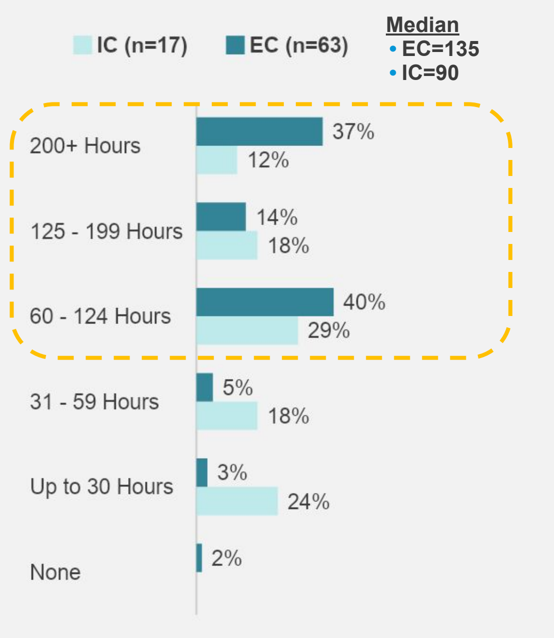
Q. How much time do you spend on continuous professional development (per annum)?



7.2 Coaches' Training and Education

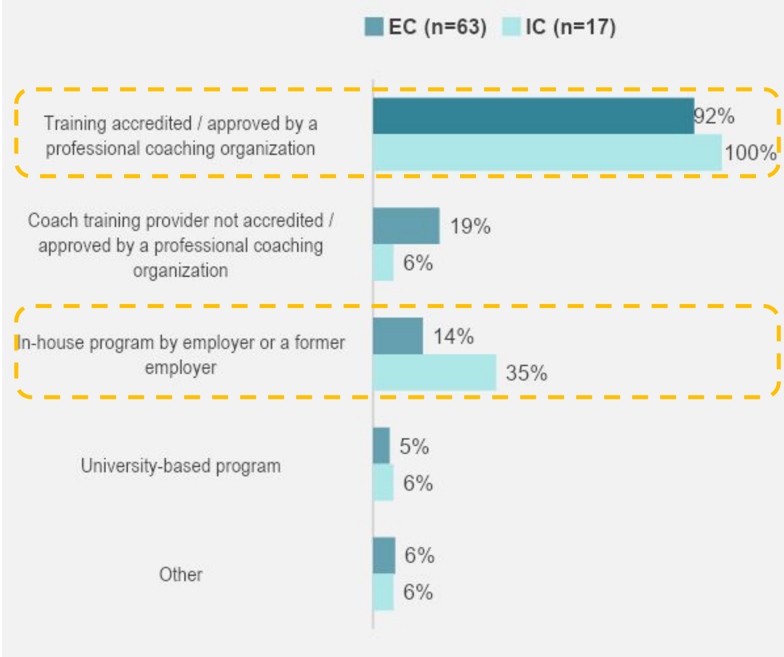
ECs have received average 135 hours of training vs. 90 Hours of ICs.

Q. Approximately how many hours of coach-specific education and training have you received?



A great majority of coaches received training from accredited professional coaching organization.

Q. Which of the following best describe the coaching education and training you have received? (Multiple Choice)



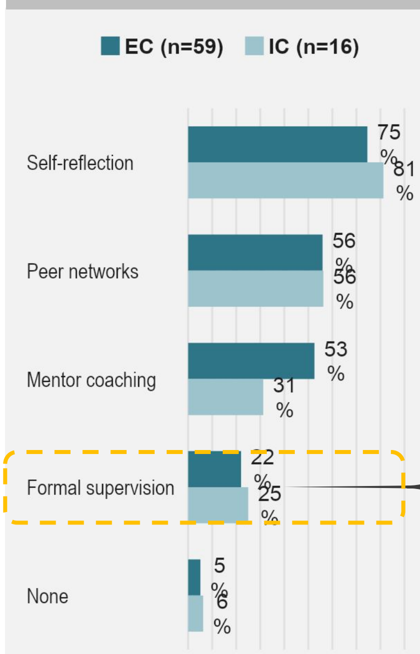
The average hours of coach-specific education and training received by Philippine ECs and ICs are similar to the average reported by the overall market (Philippine ECs 135 hours vs. Overall market ECs 138 hours; Philippine ICs 90 hours vs. Overall market ICs 85 hours)

Majority of coaches (92% ECs and 100% ICs) say they have received training from accredited or approved professional coaching organization, while a higher proportion of ICs have received in-house coaching training from their employers (35% vs. 14%).

7.3 Reflective Practices / Coaching Supervision

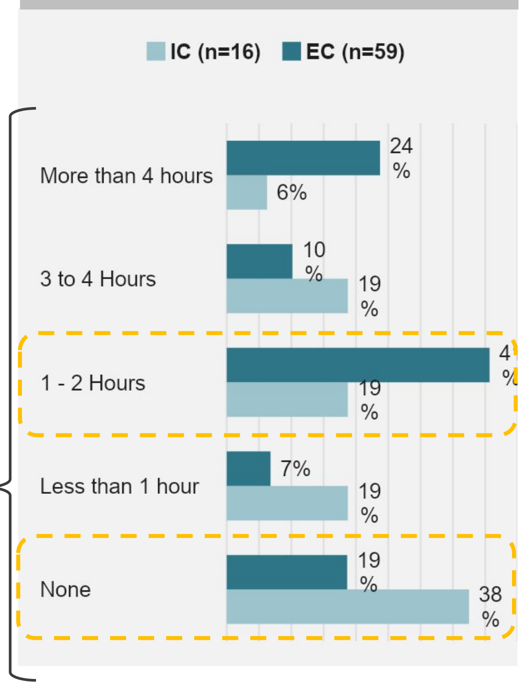
Self-reflection is the most followed reflective practice.

Q. Which of the following forms of reflective practices do you engage in as a coach? (Multiple choice)



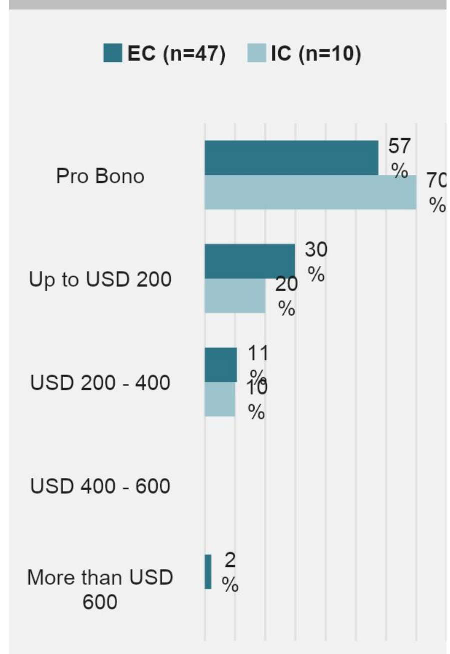
Maximum number of ECs spend 1 to 2 hours per month in coaching supervision.

Q. How much time (hours per month) do you spend engaging in coaching supervision for your professional development as a coach?



While most Coaches get supervision pro bono, 30% of EC pay up to USD 200 / hour.

Q. What amount do you spend per hour (in USD per hour) engaging in coaching supervision for your professional development as a coach?



The top 3 reflective practices are self-reflection (EC 75%, IC 81%), peer networks (EC 56%, IC 56%) and mentor coaching (EC 53% and IC 31%).

Formal coaching supervision, although very new practice**,** is also being used by 22% of ECs and 25% of ICs. The most number of Philippine ECs (41%) spend 1 to 2 hours per month on coaching supervision, while the most number of ICs (38%) do not engage in any supervision. While majority of the Coaches (EC 57% and IC 70%) get their supervision pro bono, some of them (EC 30%, IC 20%) say they pay up to USD 200 per hour.

Something to ponder:

How is the value of Formal Supervision distinct from Mentor Coaching and Peer Network learning and how does it enhance the quality of coaching? How do we ensure the quality of supervision?

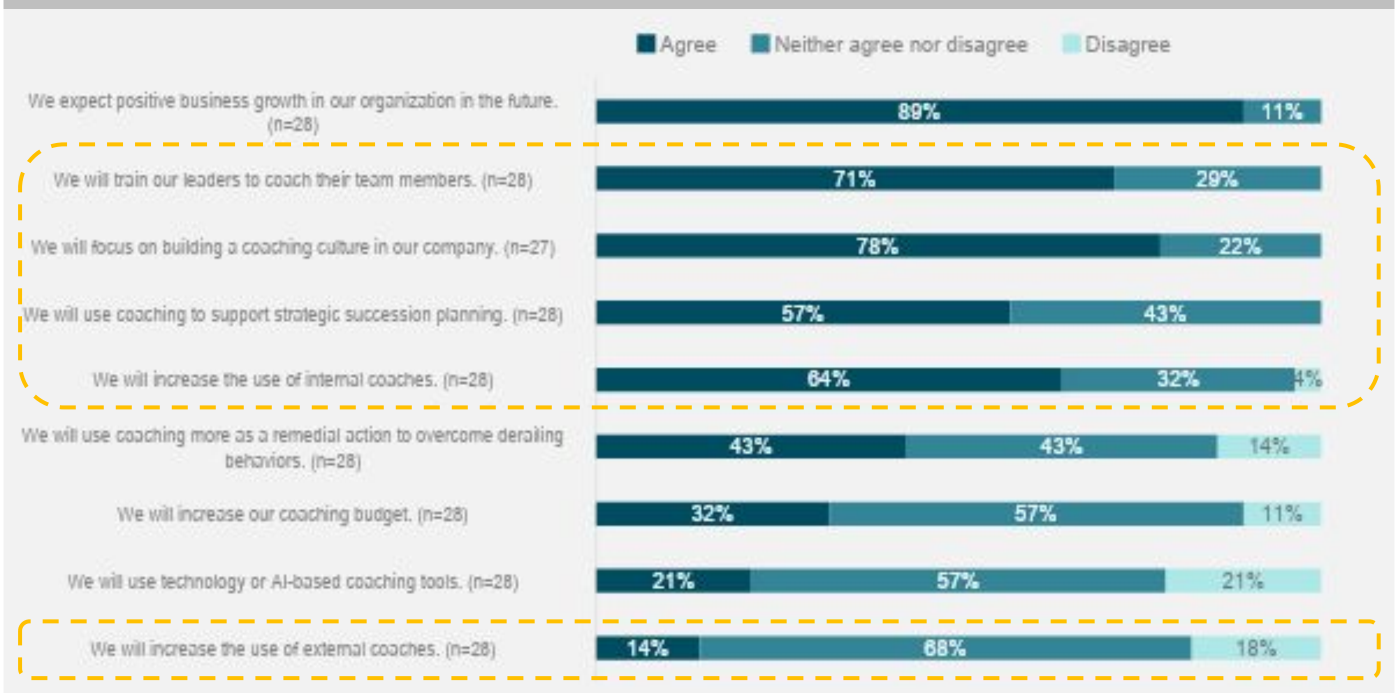
8
Outlook

8.1 Companies' Perspective on Future Outlook

While Organizations plan to increase focus on coaching, it seems the focus is more on building in-house capabilities.

Philippine companies agree to increase focus on coaching in terms of building a coaching culture (78%), training leaders to coach (71%), and increasing the use of internal coaches (64%). In contrast, only 14% of companies agree to increase the use of external coaches.

Q. Please indicate the extent to which you agree with the following statements regarding your future outlook about your company and its coaching activities.



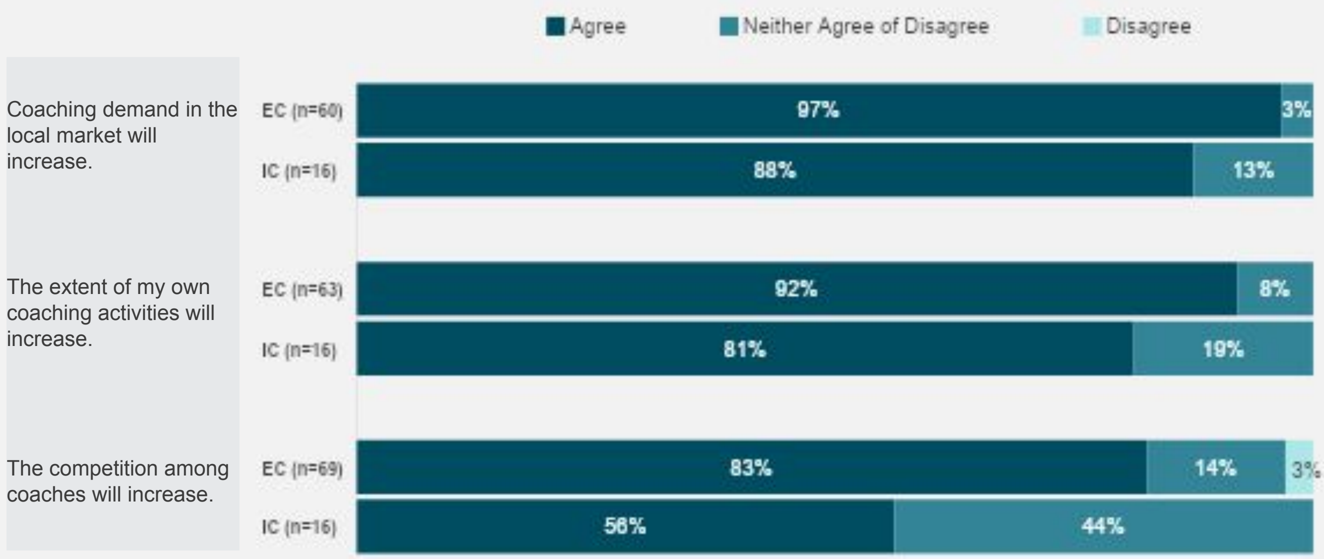
Something to ponder:

While companies want to create internal capability for coaching, how could they use coaching intervention strategically to create a competitive advantage for their business? How can they capitalize on available external expertise to build on the internal resources?

8.2 Coaches' Perspective on Future Outlook

ECs and ICs are predicting the increase in coaching demand, coaching activities, and competition within the next two years.

Q. Please give us your outlook about future developments in coaching within the next two years.



8.2 Coaches' Perspective on Future Outlook – cont.

ECs and ICs are predicting the increase in all types of coaching services.

The top 3 types of coaching services predicted to increase are Coaching skills training (EC 94%, IC 88%), One-to-one coaching (EC 92%, IC 81%), and team coaching is (EC 90%, IC 88%) indicated to increase.

More ECs predict an increase in Coaching supervision (90% vs. 57%), Group Coaching (82% vs. 63%), and Coaching apps and AI-based tools (76% vs. 67%) than ICs.

Q. For each of the options below, please indicate the likely future trend.

Something to ponder:

With the increase in demand and supply, how will the future market evolve? In such a scenario, how can coaches deepen and broaden their skills to continuously add value and stay ahead of the competition?

9
Closing Thoughts

Closing thoughts

- We are happy to present to you the **Geography Report** for **Philippines**, part of the **5th Coaching Survey – an Asia Benchmark.** Individual geography reports for India, Indonesia, Mainland China, Philippines and Singapore are also available for a more detailed study.

- **The Integrated Report** is available on our website to give you an indepth and comprehensive overall understanding of the coaching landscape for the six markets.

- If as a reader and researcher you would like to dive deeper into any research question presented in this survey, you are welcome to reach out to us. We welcome your *feedback and comments, please reach out to:*

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We would like to thank you for participating in the survey.

The success of this survey is attributed to your participation and an expanded reach across markets.