



## **RESEARCH SURVEY**

**Return on Investment (ROI) from Corporate Coaching**

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## **1. Background**

With the popularity of coaching as a personal and organisational development intervention growing on a daily basis, purchasers of coaching are questioning the level of quantitative and qualitative benefit received in relation to the sometimes high costs incurred.

The Association for Coaching in response to the needs of both purchasers and coaches set out to contribute to the debate as to whether a return on investment for coaching could be established. The purpose of the research was three fold:

1. To identify the criteria organisations use to select their coaching providers
2. To begin a process to establish the potential return on investment clients can gain from coaching
3. To clarify the benefits that managers of individuals being coached experience

In the following paper we have summarised the responses gained from a web based return on investment (ROI) survey that ran in Spring 2004. The participants of the survey came from a number of business sectors with the largest number of responses from Pharmaceuticals, Financial Institutions, Consulting and Education. The results have been broken down into the views of those that purchase coaching services and those that have been coached.

## **2. Executive Summary**

The first part of the study focused on the criteria used to select coaching providers and who coaching is offered to. Not surprisingly we found that corporate or executive coaching is only offered to a minority of staff with fifty percent of purchasers using corporate coaching for 10 or less staff. Staff selected generally have 6 or less coaching sessions, and are typically at a mixture of grades, with the largest sub group being board directors.

Coaches are, in the majority of cases, selected on the basis of proven effectiveness, personal knowledge and recommendation with cost being seen as a lesser factor. An individual's line manager and the coachee themselves are the biggest groups to decide whether to have a coach or not, with the matching in the majority of cases undertaken by the purchaser. A coach's business experience and personal development skills are the biggest factors in the matching decision. The final objective of corporate coaching in 72% of cases is to develop a coachee's business performance.

According to purchasers, coaching success is predominantly dependent on the views of the coachee and the coachee's manager with a measure of an individual's performance in their job balanced towards qualitative measures rather than quantifiable measures. In looking at coaching benefits, purchasers stated that an increase in productivity was the most likely quantifiable benefit, however only 37% of purchasers had this opinion in contrast to 58% and 53% of purchasers stating qualitative benefits of better people management skills and increased job motivation respectively.

In looking into purchaser's confidence that these benefits were in fact as a result of coaching we found that the majority of purchasers had greater than 50% confidence

including 47% of purchasers having 70 -100% confidence in quantifiable benefits and 47% of purchasers having 70-100% confidence that coaching has a direct benefit on the people management skills of the coachee.

In deciding to undertake this research we were looking to see whether we could gain enough quantitative data to determine a percentage ROI figure from a purchaser's and a coachee's perspective. When asked whether finding a quantifiable measure of ROI was important, 48% of purchasers said it was important, 12% said no and 24% said not at the moment. However, what has become apparent from undertaking this exercise is that organisations are currently unable to put a monetary value to the benefit gained be it either a quantitative benefit e.g. an increase in productivity or a qualitative benefit such as an increase in motivation. In determining a ROI figure this is an essential piece of information and at present is missing because either the data is not collected or it can not be estimated. It may also be that the benefit coaching brings is more an indirect benefit rather than a direct benefit being one of a number of variables that bring about a behaviour change in an individual which impacts business results.

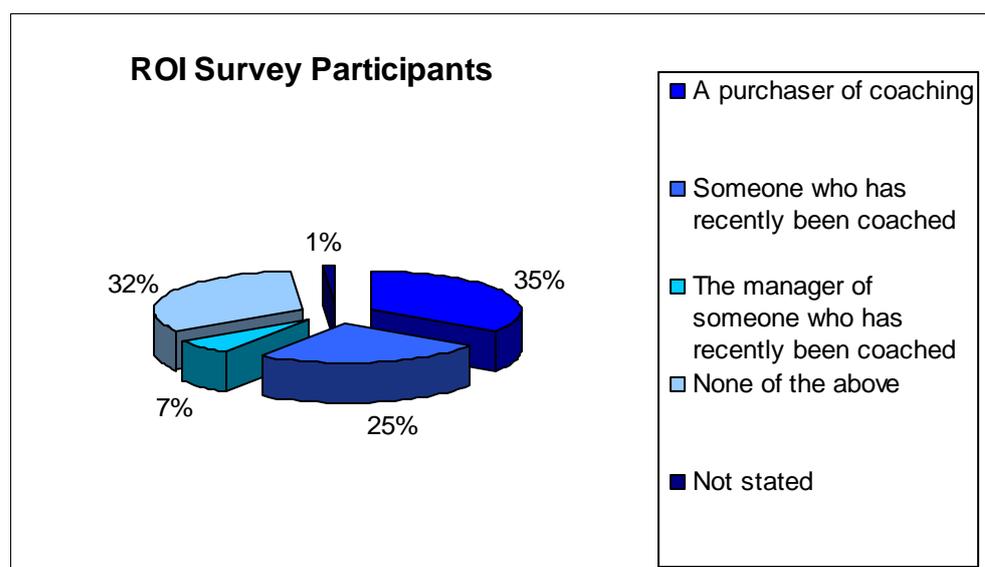
If, however purchasers are to gain a robust quantifiable ROI figure (or just a clearer view on benefit versus cost) more work needs to be directed at estimating the monetary benefit of coaching be it a quantitative or a qualitative benefit to the coachee.

The report goes on to explore what coachee's themselves thought the benefits of coaching was so as to be able to contrast their opinion with that of purchasers. In looking at a coachee's understanding entering the process it is encouraging to note that only 10% of coachees had a limited understanding of the coaching process however only 40% were convinced that the organisation believed in its effectiveness. Over 60% of coachees were looking to and actually did address coaching objectives focused on personal performance with improvements in confidence and communication skills being addressed in sessions more than initially sought out. Coaching does not seem to have helped those looking to focus on teamworking and improved people management skills. An interesting point to note when purchasers stated that improved people management skills were one of the biggest qualitative benefits of coaching.

In looking into coaching objectives sought and addressed, enhanced personal performance and increased confidence, along with strategies for coping with work demands are seen as key areas to focus on. The coaching interventions were seen as very effective and effective by the majority of coachee's looking to improve confidence and personal performance. However, coaching was seen as only somewhat effective in dealing with staff management and team development.

In agreement with purchasers, coachees believed that an increase in productivity was a quantifiable benefit by 20% of coachees. However like the purchasers these percentages are very low. In contrast to the quantifiable benefits, nearly 50% of coachees believed they had improved work life balance with the majority stating over 50% confidence that the results were due to coaching. In looking at what the coaching brought to the coachee as opposed to other interventions, 22% of people felt that it helped them to learn more quickly and 17% felt that they learnt more on a 1:1 interaction with 69% of coachees stating that they would be coached again.

### 3. Who Undertook the Survey?



The survey was accessed by 136 people, 90 of whom went on to start the survey; the remaining 46 people were declined as they did not meet the criteria of being either a purchaser of coaching, a coachee or a manager of a coachee. It is likely that a number of those declined were professional corporate coaches. Forty two people went on to complete the survey- a participation rate of 31%.

Due to the limited data we received from managers of coachees we have chosen not to analyse the data as it would not be meaningful. However it would appear from the information given from the two other categories of participants it is an area in need of further research as 60% of decisions to proceed with coaching are made by the line manager.

More information about the demographics of the survey participants can be found at the end of the document.

### 4. Survey Results

The survey results are analysed on two fronts, from the perspective of the purchaser of coaching and the coachee.

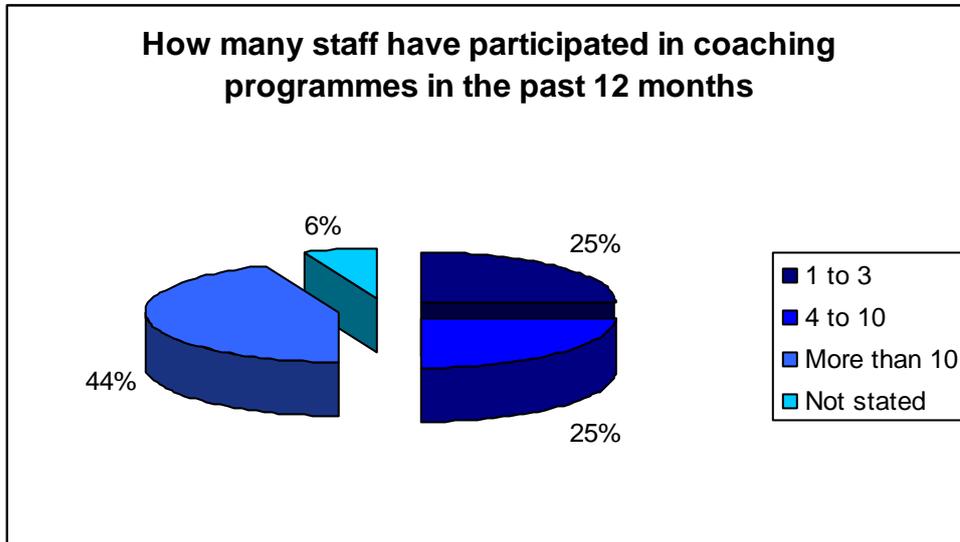
#### 4.1. What criteria do organisations use to select their coaching providers?

Fifty percent of purchasers use corporate coaching for 10 or less staff. Staff selected generally have 6 or less coaching sessions, and are typically at a mixture of grades, with the largest sub group being board directors.

Coaches are, in the majority of cases, selected on the basis of proven effectiveness, personal knowledge and recommendation with cost being seen as a lesser factor. An individual's line manager and the coachee themselves are the biggest groups to decide whether to have a coach or not, with the matching in the majority of cases undertaken by the purchaser. A coach's business experience and personal development skills are the biggest factors in the matching decision. The final objective of corporate coaching in 72% of cases is to develop a coachee's business performance.

Please see below for a more detailed breakdown of the results:

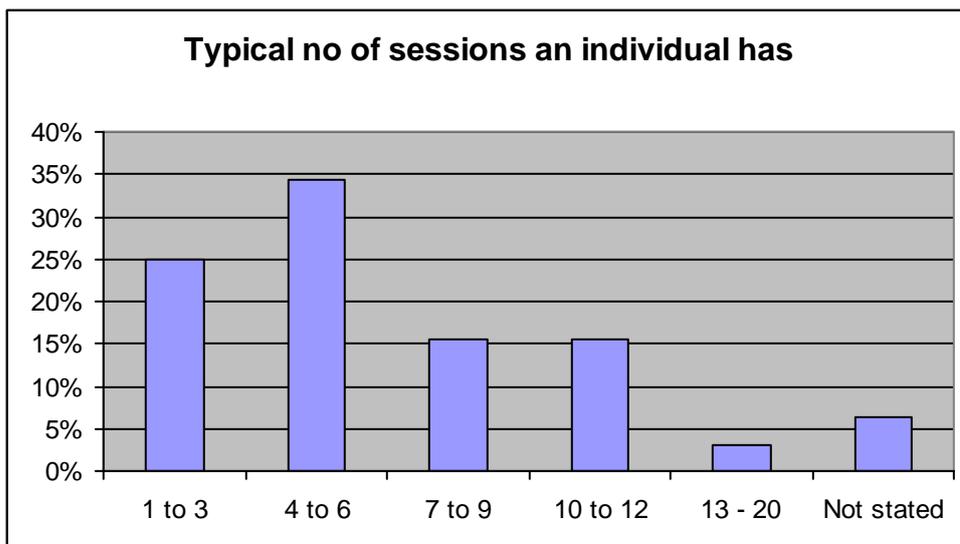
**4.1.1. How many staff participate in coaching programmes and how is the coaching conducted?**



Fifty percent of purchasers have had 10 or less staff participate in a coaching programme and 44% have had 10 or more staff participate. Of those staff that undertake a coaching intervention, 88% of this coaching is face to face with the use of telephone and email as support interventions.

**4.1.2. How many sessions and how long for?**

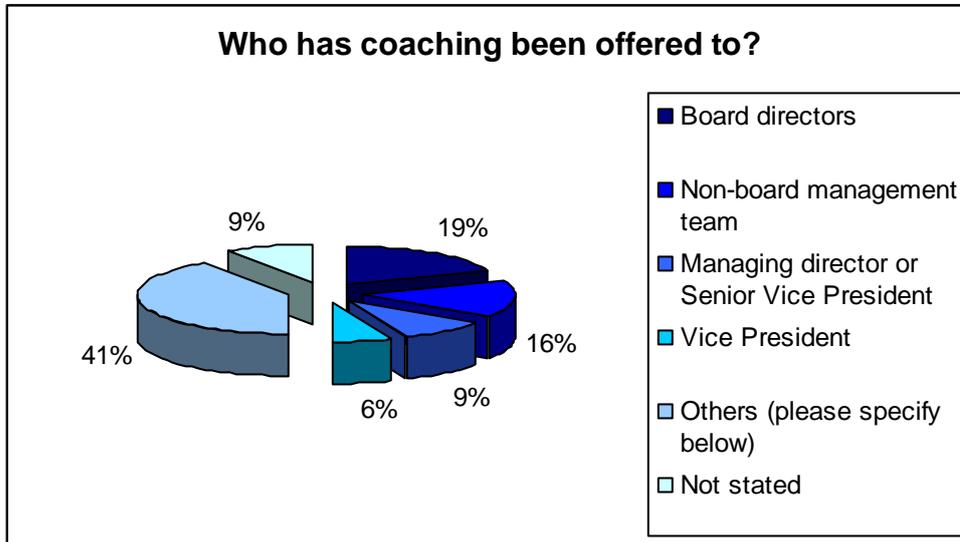
Typically 59% of people have 6 or fewer sessions with 19% of staff having 10 or more sessions.



The duration of the coaching sessions, from a purchaser's viewpoint, are between 3-6 months (44%) with 22% less than 3 months and 28% over 6 months

#### 4.1.3. Who is Coaching offered to?

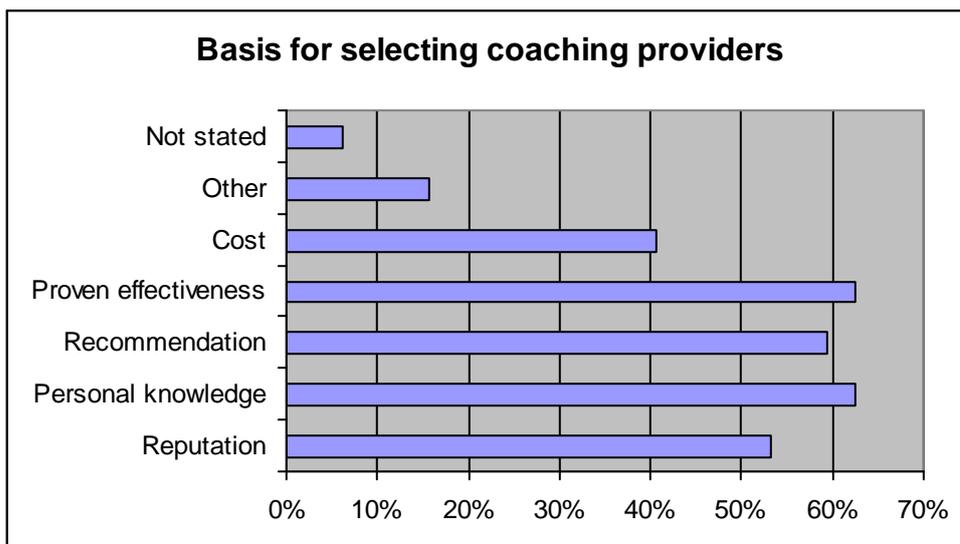
In 41% of cases coaching is offered to a mixture of levels with 28% offered specifically to board directors, MDs or SVPS:



Of the large number of purchasers that stated 'Other' their feedback stated the focus is on a mixture of staff at different grades and some purchasers concentrate specifically on high potentials/performers at director level.

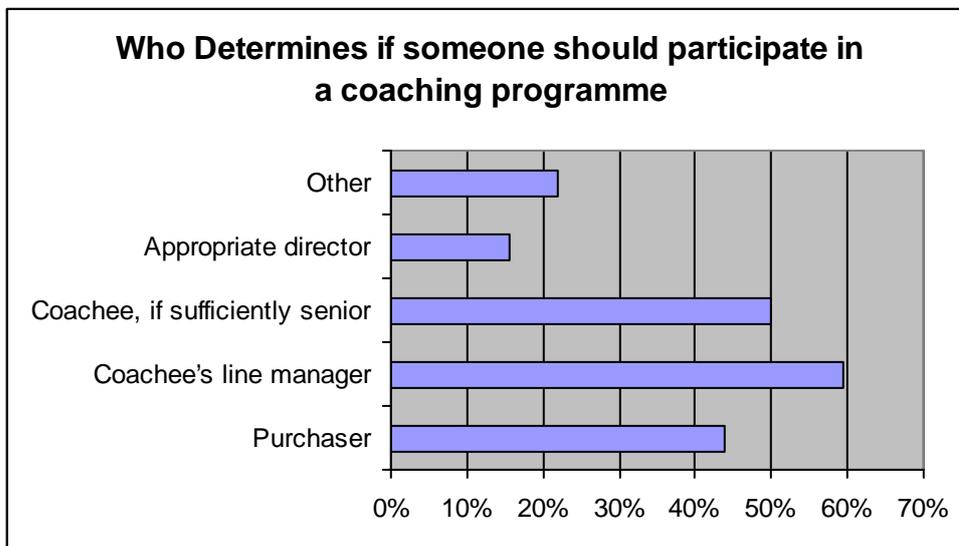
#### 4.1.4. On what basis are Coach's selected?

Coaches are selected, by purchasers on the basis of proven effectiveness, personal knowledge and recommendation. Cost was seen as a lesser factor.



Others use a mixture of selection criteria including: assessment of capability, Interview processes, Industry experience; track record; psychological qualifications; indemnity insurance; supervisory arrangements; 'fit', procurement and experience in a specific business sector.

Line managers in 59% of cases make the decision on whether a coachee is to participate. Interestingly, if sufficiently senior, 50% of coachees determine whether they should participate.

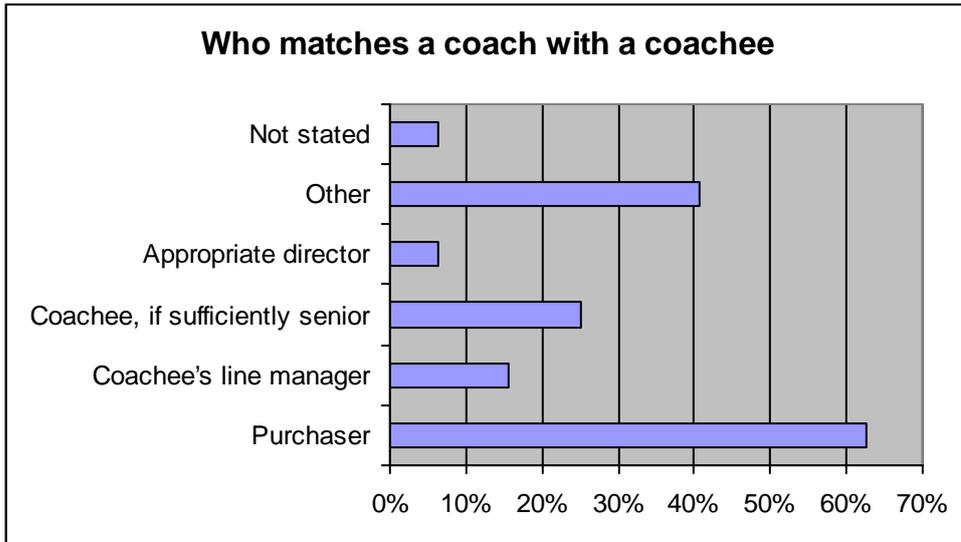


Other purchasers use a combination of approaches including: a strategic process, joint arrangements between the line manager and purchaser, an independent assessor, the Head of Training and the Sponsors of the coachee.

#### 4.1.5. Coach Matching

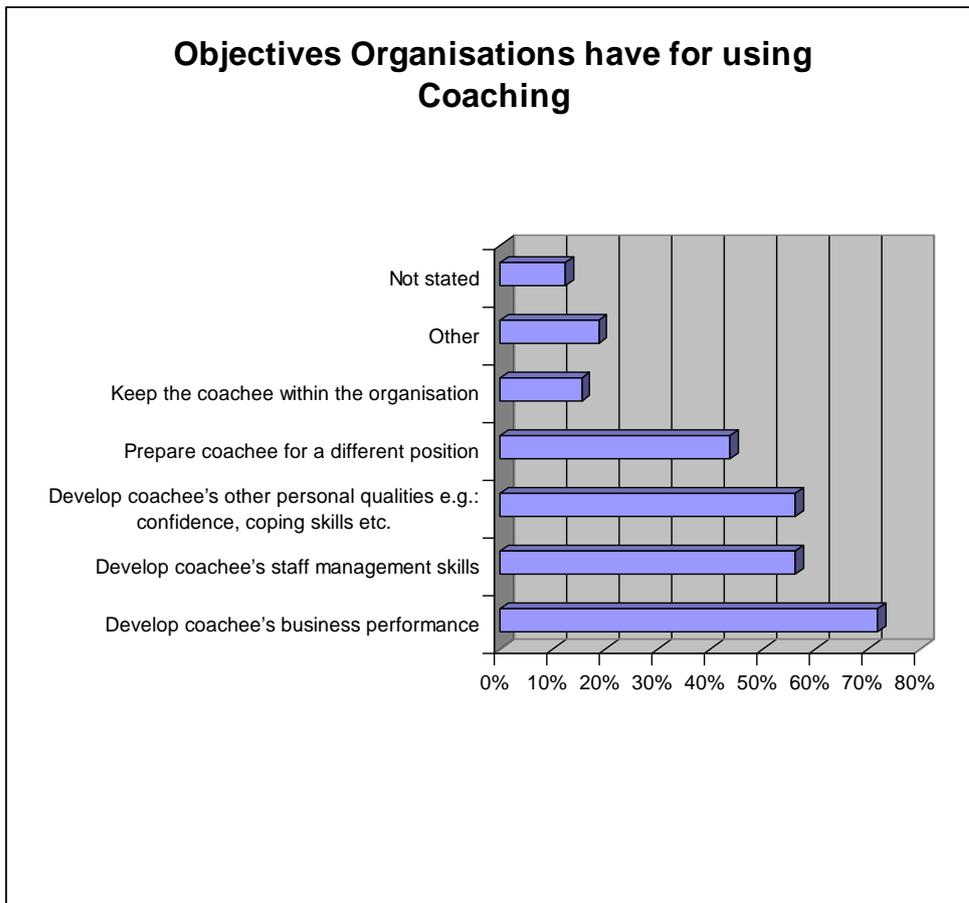
Sixty three percent of purchasers undertake the matching of a coach to coachee, 25% leave it to the coachee and 41% use a mixture of the purchaser and coachee. Other approaches include the use of: the coaching company - based on profiling of coachees, the Learning and Development team (i.e. HR), the Client Management at the coaching organisation and the Corporate Learning department.

Business experience and personal development skills are the key factors in coaching matching decisions. Also used are levels of seniority; personality, an Intuitive sense that the chemistry will work, the personal development focus and style of the coach, the development needs of the coachee, and the coach having a knowledge of the organisation.



#### 4.1.6. Coaching objectives

Seventy two percent of purchasers said the objective they had for using coaching was to develop a coachee's business performance. Staff management and personal qualities were selected by 56% of people. Other reasons include: exit support, as a sell on product, development of people skills, preparation for the promotion process and to prepare employee for a specific business project.



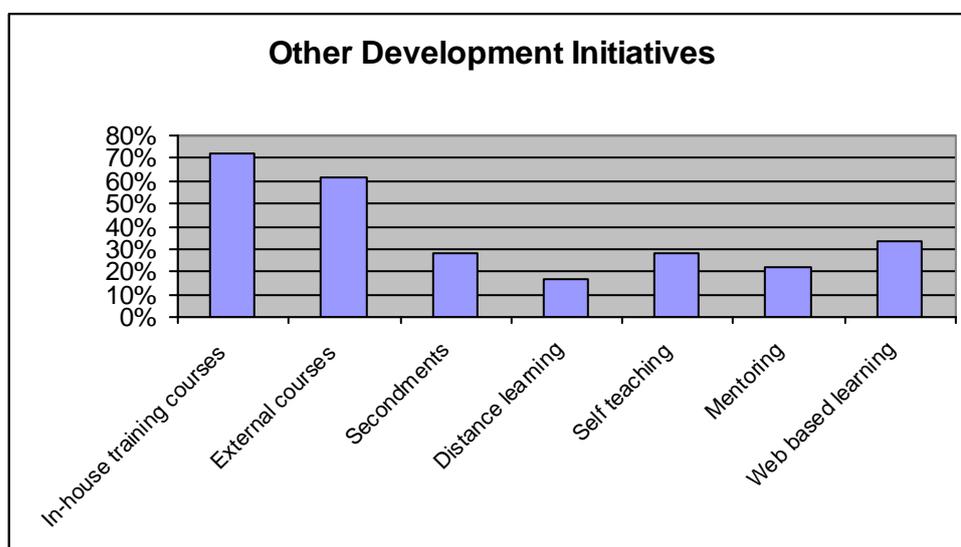
#### 4.1.7. What are the attributes of a typical coachee?

A question in the survey asked Purchasers to provide some demographic information on what a typical coachee's attributes were. While a large number of people did not state this information, the responses of those that did are summarised below:

Age Range	40% coachees are between <b>36 and 45</b> with 12% between 31-35 and 51-55 respectively
Gender	<b>60% male</b> and 8% female with 32% people not stating a response
Salary	32% less than 100K, 28% <b>100-150K</b> , 12% 200-300K
Length of time with the Organisation	under 2 years 4%, <b>2-10 years</b> 52%, 10 years 20%, 16% over 10 years
No of Direct Reports	under 5 staff reporting to them- 16%, 6-20 staff 12%, <b>20-160 staff</b> 24%, 160 and above 8%
Typical fees	Between £3500 to £12000
No of hours coachee time spent on coaching	Between 6 and 21 hours
No of hours of purchasers time involved	Between 2 and 10 hours

#### 4.1.8. Other Development Interventions

In house training courses and external courses are the dominant organisational development interventions running alongside coaching interventions.



#### 4.2. What is the potential return on investment clients can gain from coaching?

In deciding to undertake this research we were looking to see whether we could gain enough quantitative data to determine a percentage ROI figure from a purchaser's and a coachee's perspective. What has become apparent from undertaking this

exercise is that organisations are currently unable to put a monetary value to the benefit gained be it either a quantitative benefit e.g. increase in productivity or a qualitative benefit such as an increase in motivation. In determining a ROI figure this is an essential piece of information and at present missing due to it either being unestimatable and/or the data is not collected.

It may also be that the benefit that coaching brings is more an indirect benefit rather than a direct benefit being one of a number of variables that bring about a behaviour change in an individual which impacts business results. We have therefore collected data on purchasers and coachees views on the:

- Type of benefit they have gained
- Their confidence that this benefit is as a result of coaching
- Where they obtained their information to determine their benefit judgement

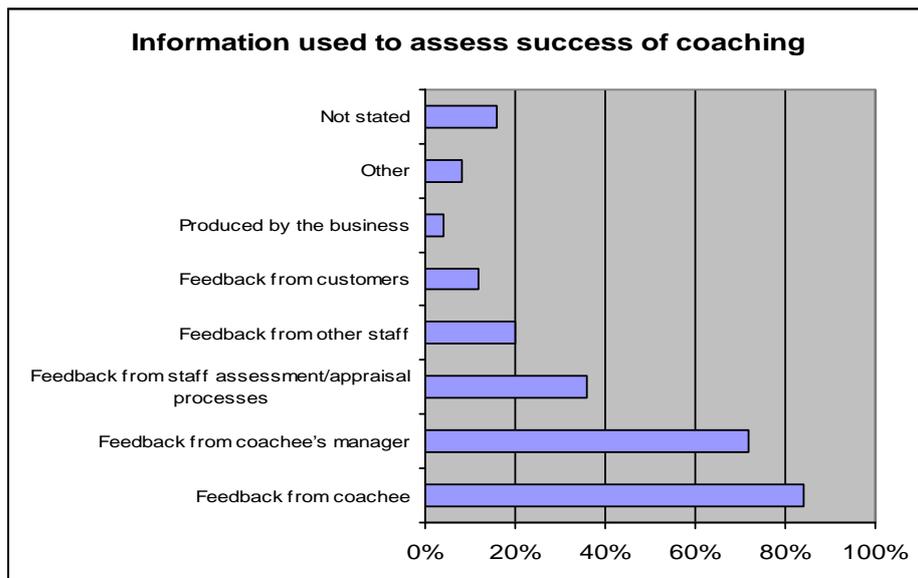
When asked whether finding a quantifiable measure of ROI was important, 48% of purchasers said it was important, 12% said no and 24% said not at the moment. If purchasers are to gain a robust quantifiable ROI figure (or just a clearer view on the quantifiable benefits) more work needs to be directed at estimating the monetary benefit of coaching be it a quantitative or a qualitative benefit.

In summary coaching success is predominantly dependent on the views of the coachee and the coachee's manager with a measure of an individuals performance in their job balanced towards qualitative measures rather than quantifiable measures. In looking at coaching benefits, purchasers stated that an increase in productivity was the most likely quantifiable benefit, however only 37% of purchasers had this opinion in contrast to 58% and 53% of purchasers stating qualitative benefits of better people management skills and increased job motivation respectively. In looking into purchaser's confidence that these benefits were in fact as a result of coaching we found that the majority of Purchasers had greater than 50% confidence with 47% of purchasers having 70 -100% confidence in quantifiable benefits and 47% or purchasers having 70-100% confidence that coaching has a direct benefit on the people management skills of the coachee.

Information on a purchaser's perspective is found in section 4.2 below and the coachee's perspective is found in section 4.3

#### **4.2.1. What information is used to determine coaching success?**

Coaching success is, in the majority of cases, currently determined by the coachee and the coachee's manager with the staff appraisal used 36% of the time and other staff's views 20% of the time.

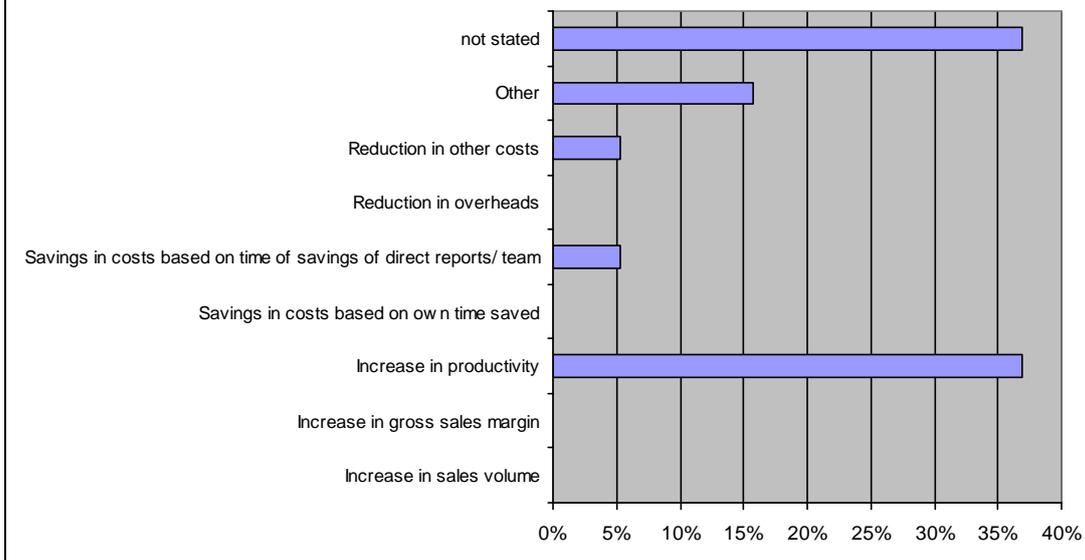


Interestingly, performance in a job is assessed by qualitative rather than quantitative criteria with qualitative criteria such as good team working and communication skills being selected by 80% purchasers and quantitative criteria such as income or profit generated being selected by 52% of purchasers. There therefore seems a mismatch with the stated objectives of improving business performance with the measurement systems in place that focus on qualitative benefits. Unless, however improved business performance is seen on balance in qualitative measurement terms rather than quantitative terms i.e. how an individual goes about the job is on balance a better measure of business performance than what they achieve. In effect the qualitative measure is an indirect measure of business performance in cases where direct quantitative measures are unable to be determined.

#### 4.2.2. Quantifiable benefits

In looking into the purchaser's views on what are the quantifiable benefits of coaching we see that an increase in productivity is felt to be the dominant indicator however this is only selected by 38% of purchasers. At least as large a proportion of purchasers chose not to state a response on this question. For those that chose an 'other' reason, indicators included: reduction in legal expenses; reduction in turnover expense; increase in team staff opinion survey; increased motivation; change in attitude/approach; Increase in personal confidence; higher profile in the organisation, man management improvements and improved leadership skills. Again it can be seen from these criteria a number of them are more qualitative indicators rather than pure quantitative indicators.

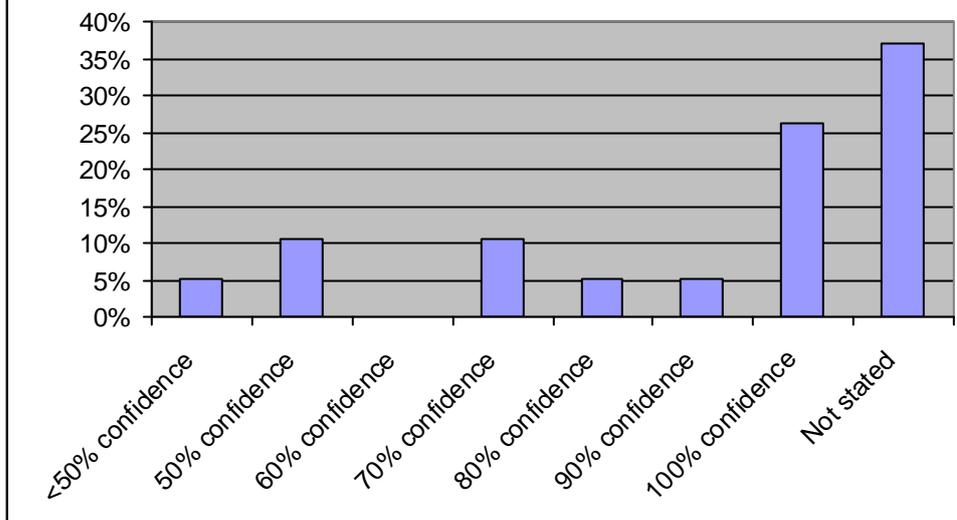
### Quantative benefits of coaching (according to purchaser)



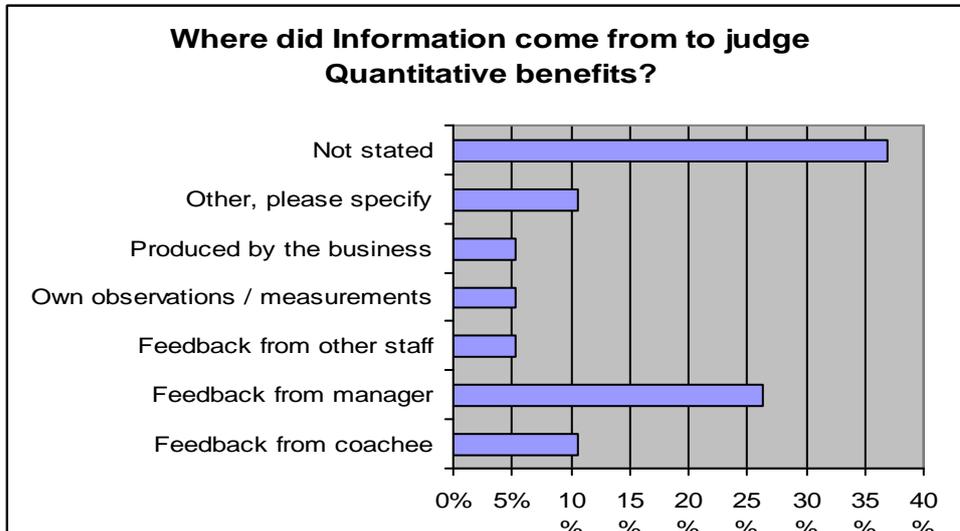
In looking at the confidence purchasers have that the benefit is due to coaching, we found that all those that stated an increase in productivity as a benefit had greater than 50% confidence and 40% of these people had greater than 90% confidence that coaching was the cause.

In looking at all benefits we see that 26% of purchasers have 100% confidence that the benefit was as a result of coaching and 47% of people had greater than 70% confidence. However we also need to take into consideration the 37% of people that chose not to state an opinion.

### % Confidence that Quantitative benefit was due to coaching

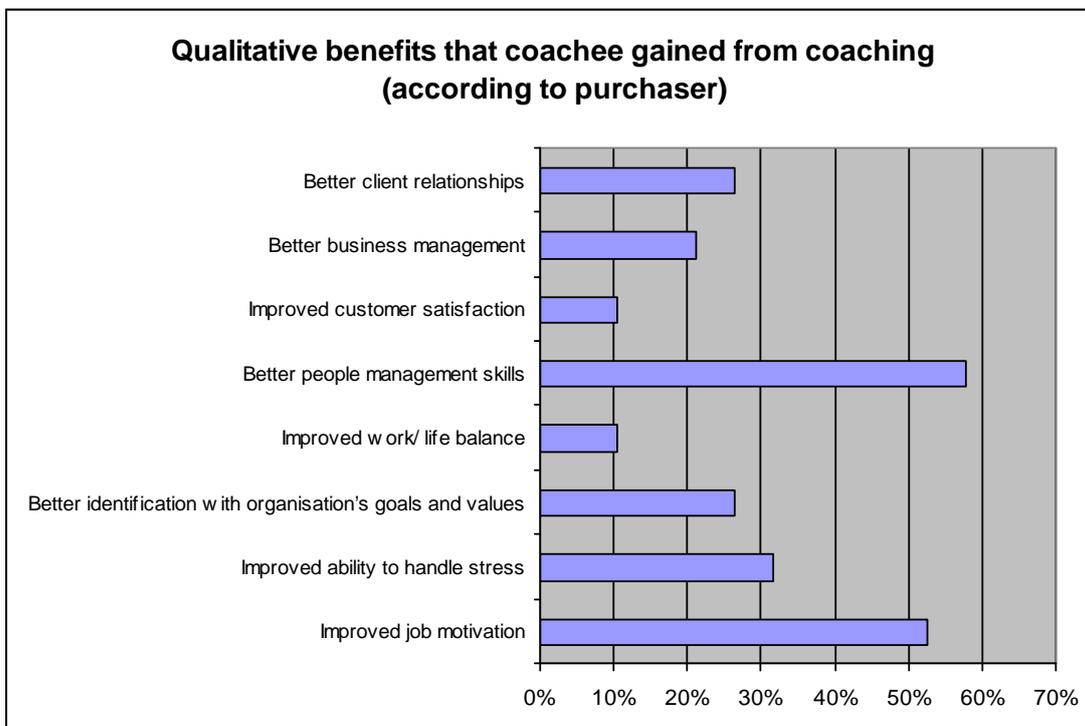


Recognising then that coaching seems to have a large impact on quantifiable benefits in some cases, we were then interested to see on whose opinion were purchaser's judgments made. The purchasers that stated that there was a quantifiable benefit stated that this was based on feedback from the line manager and the coachee.



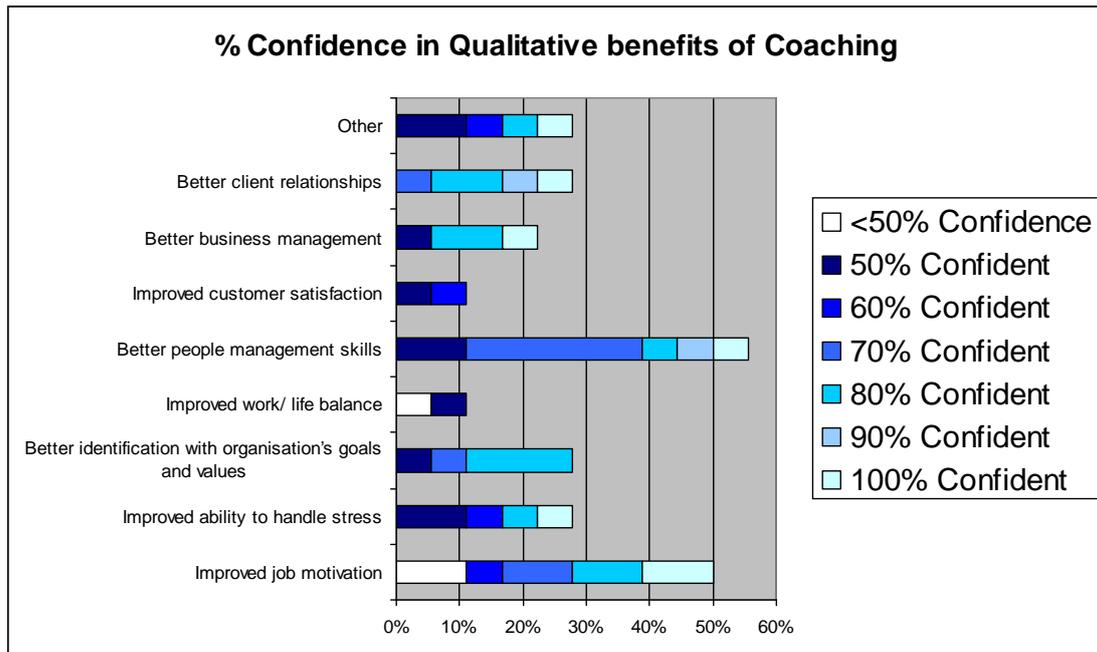
#### 4.2.3. Qualitative benefits

In looking at qualitative benefits of coaching, purchasers seem to have clearer views with no-one choosing not to state an answer. The majority opinion is that coaching helps to improve people management skills (58%) and an individual's job motivation (53%).

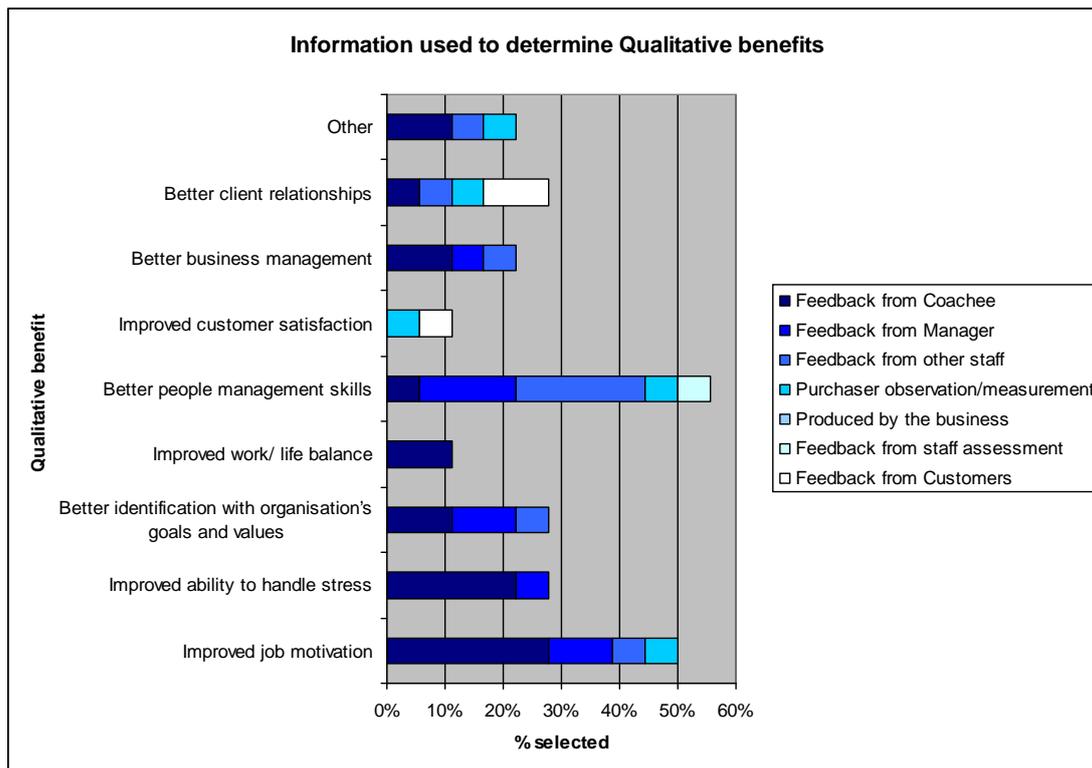


In looking at purchaser's confidence that the benefit was due to coaching we find that in relation to people management skills 28% of people are 70% confident that the benefit is due to coaching with an additional 12% having 90 and 100% confidence. No one had less than 50% confidence.

In looking at improved job motivation, 33% had 70-100% confidence; however 11% of people had less than 50% confidence. One other large category of high confidence is the benefit that coaching has on people's identification with organisational goals. While overall this was not one of the highest benefits it is interesting to note that 17% of people had 80% confidence that coaching created this benefit.



Finally in looking at who the source of this opinion stemmed from it can be seen that it is predominantly based on feedback from the coachee. However in looking at staff management skills this is predominantly based on feedback from staff. Interesting to note is that there is limited observation/measurement by the purchasers who initially do the matching.



### 4.3. To clarify the benefits that managers and individuals being coached experience

In this next section we were interested to find out what coachee's themselves thought the benefits of coaching were so as to be able to contrast their opinion with that of Purchasers.

In looking at coachee's understanding entering the process it is encouraging to note that only 10% of coachees had a limited understanding of the coaching process however only 40% were convinced that the organisation believed in its effectiveness. Fifty two percent of coachees stated that their coaching sessions lasted less than 6 months. Over 60% of coachees were looking to and actually did address coaching objectives focused on personal performance with improvements in confidence and communication skills being addressed in sessions more than initially sought out. Coaching does not seem to have helped those looking to focus on team working and improved management skills. An interesting point to note when purchasers stated that improved people management skills were one of the biggest qualitative benefits of coaching.

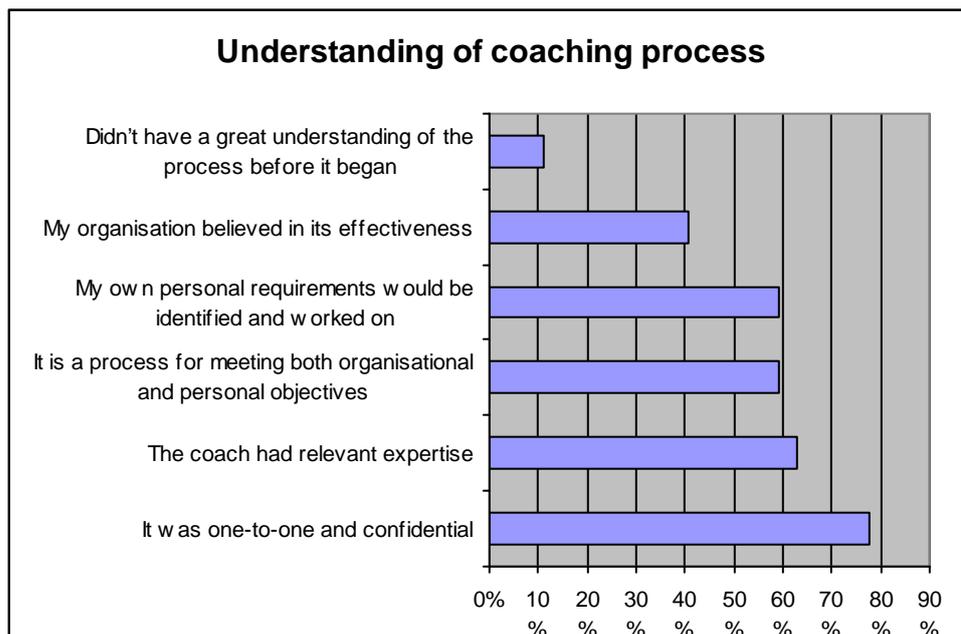
In looking into coaching objectives sought and addressed, it can be seen that enhanced personal performance and increased confidence, along with strategies for coping with work demands are seen as key areas to focus on. The coaching interventions were seen as very effective and effective by the majority of coachee's looking to improve confidence and personal performance, yet only somewhat effective in dealing with staff management and team development.

In agreement with purchasers, coachees believed that an increase in productivity was a quantifiable benefit by 20% of coachees. However like the purchasers these percentages are very low. In contrast to the quantifiable benefits, nearly 50% of

coachees believed they had improved work life balance with the majority stating over 50% confidence that the results were due to coaching. In looking at what the coaching brought to the coachee as opposed to other interventions, 22% of people felt that it helped them to learn more quickly and 17% felt that they learnt more on a 1:1 interaction with 69% of coachees stating that they would be coached again.

#### 4.3.1. Understanding of Coaching process

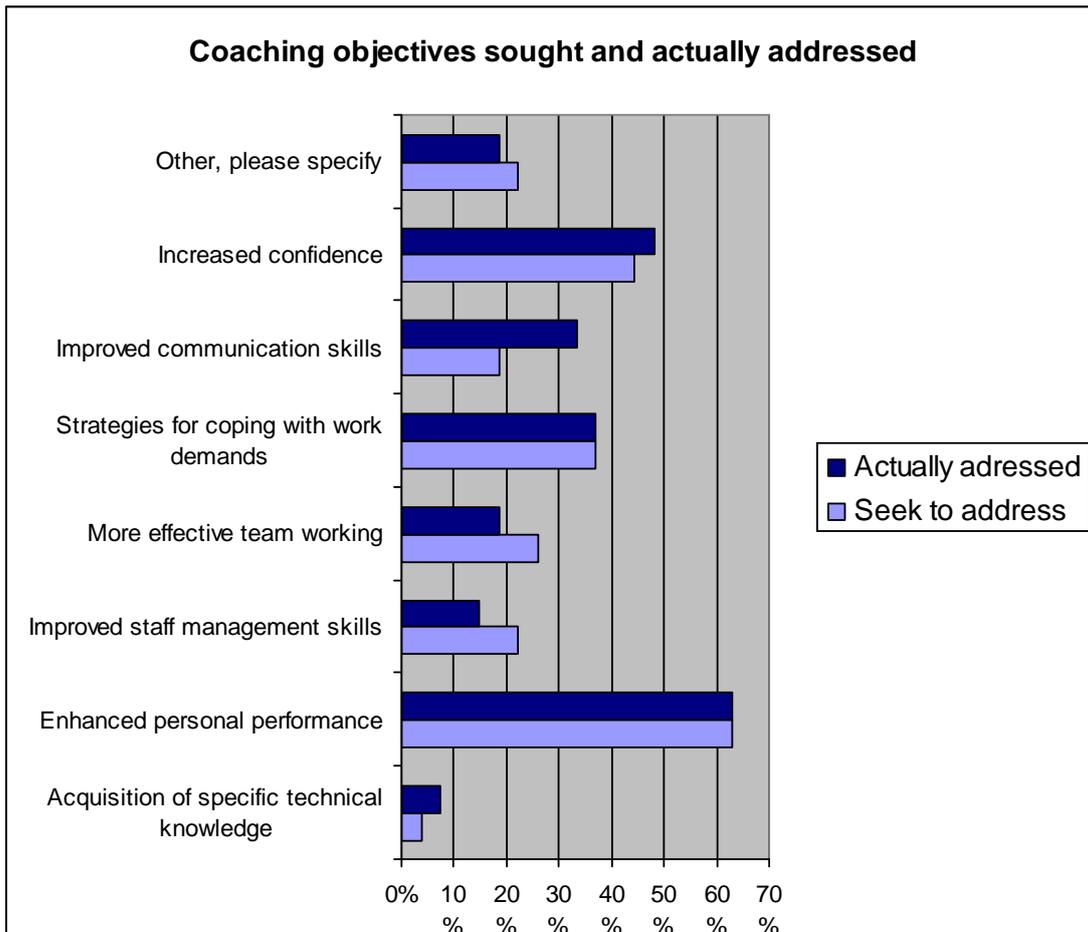
It is encouraging to note that only 11% of coachees were unaware of the coaching process before it began but more work is needed to lift the coachee's perception that the coach had the relevant experience and that the organisations sees it as an effective intervention:



#### 4.3.2. Coaching objectives sought and actually addressed

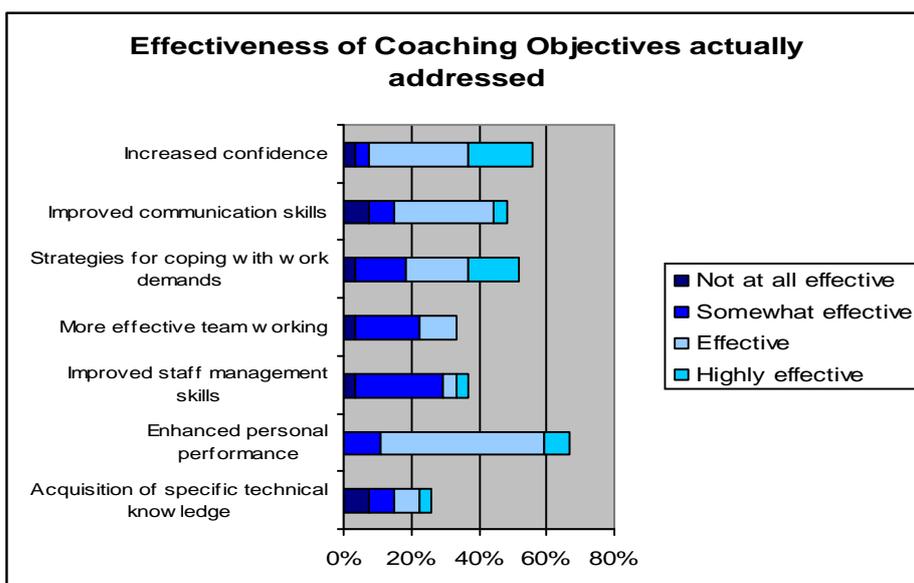
In looking into coaching objectives sought and addressed, it can be seen that enhanced personal performance and increased confidence, along with strategies for coping with work demands are seen as key areas to focus on. Coaching is not sought out to improve technical knowledge by these coachees and 'other' objectives included: figuring out future goals, career development and seeking support for difficult life/career decisions along with a job search strategy in redundancy setting.

In the top 3 areas of focus coaching did in fact focus on what was sought out, however it did not address issues for some in the areas of management skills and team working. Those that were looking for career coaching interventions gained the following: "I did figure out and achieve future goals, coaching tips to carry out coaching myself (moving into a new role); clarity on where and how to focus effort, career development and methods for optimising my job search."



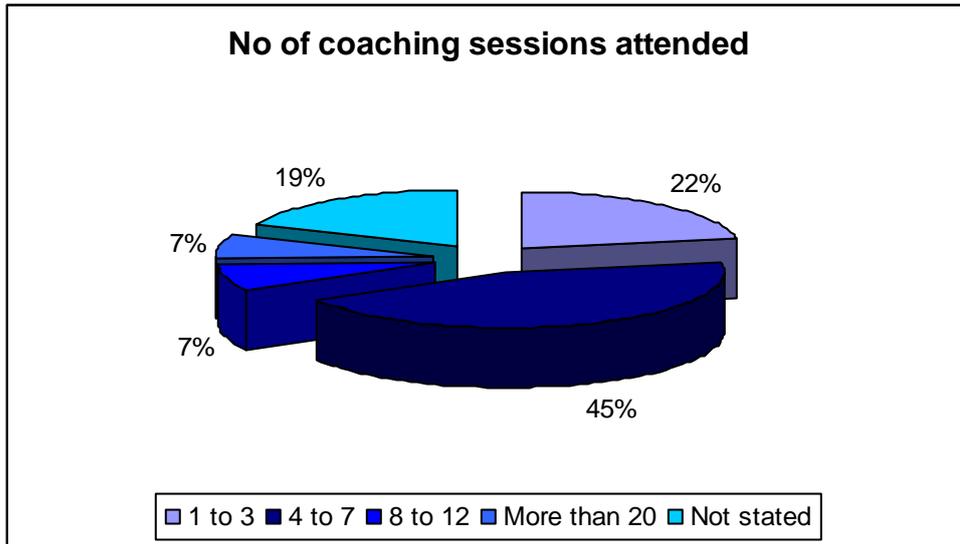
#### 4.3.3. Effectiveness of coaching process

The coaching interventions are seen as very effective and effective by the majority of coachee's looking to improve confidence and personal performance, yet only somewhat effective in dealing with staff management and team development.



#### 4.3.4. No of sessions and methods

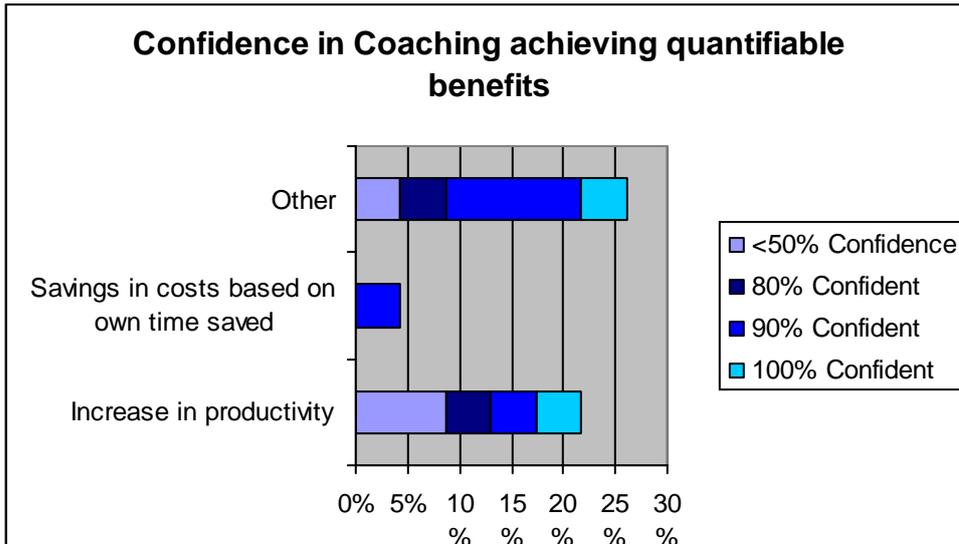
Forty five percent of coachees had between 1 and 7 sessions, this is 12% lower than the purchasers' prediction that 59% of people had between 1 and 6 sessions. Looking at those that have a large number of sessions, purchasers stated that 31% of people had between 7 and 12 sessions this is in marked contrast to the 7% of coachees that stated they had between 8 and 12 sessions. The answer may lie in the 19% of coachees that chose not to answer the question and the organisational 'make up' of the purchasers and coachees that answered the question.



From a coachee's perspective, 52% stated that their coaching sessions lasted less than 6 months with 26% of coachees stating their sessions lasted less than 3 months and 30% greater than 6 months. Coaching was in the majority of cases face to face (74%) with 22% and 15% using the telephone and email in addition.

#### 4.3.5. Quantifiable benefits

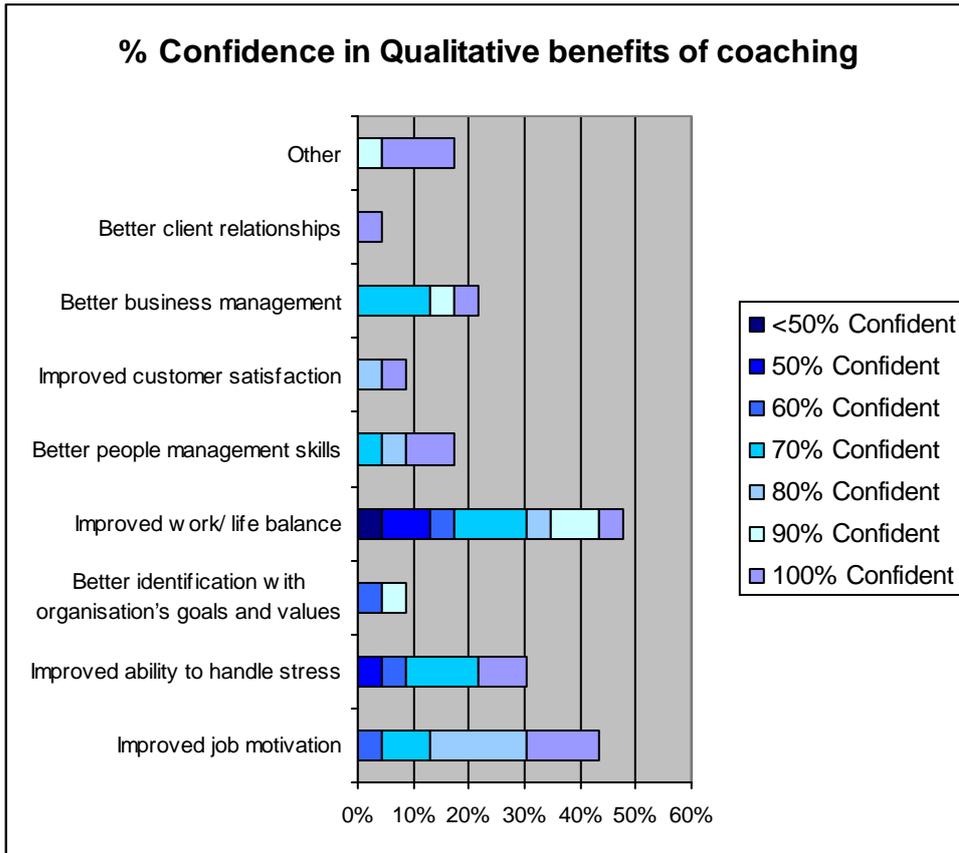
In agreement with purchasers, coachees believed that an increase in productivity was a quantifiable benefit by 20% of coachees. However a greater percentage (26%) chose to select 'other' as an answer and stated the following benefits: figured out a new career and successfully achieved it., reduction in personal stress and improved quality of output.; better understanding of situations; recognition of networking benefits and a better understanding of where to focus job-search efforts. However like the purchasers these percentages are very low. Confidence in coaching being a driver of these benefits was high but it is interesting to note the relatively high percentage of less than 50% confidence in the productivity gains.



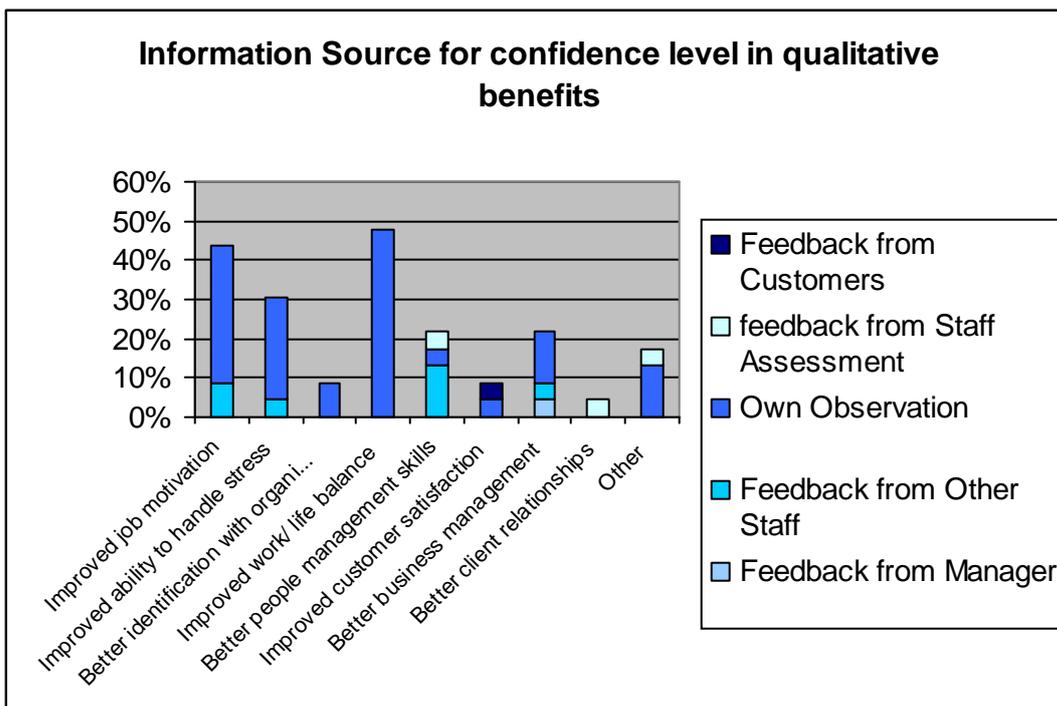
**4.3.6. Qualitative Benefits**

In contrast to the quantifiable benefits, nearly 50% of coachees believed they had improved work life balance with the majority stating over 50% confidence that the results were due to coaching. Forty three percent of coachees believed that they had improved job motivation with the majority over 80% confident. Thirty percent of coachees also felt they had an improved ability to handle stress and the majority of people believed this with 70 percent and greater confidence levels.

Other qualitative benefits stated included: more focus on the task at hand; clarification of next role; securing a new job; an increased understanding of job market/my needs; clearer view of the future and a career path that suits me best.

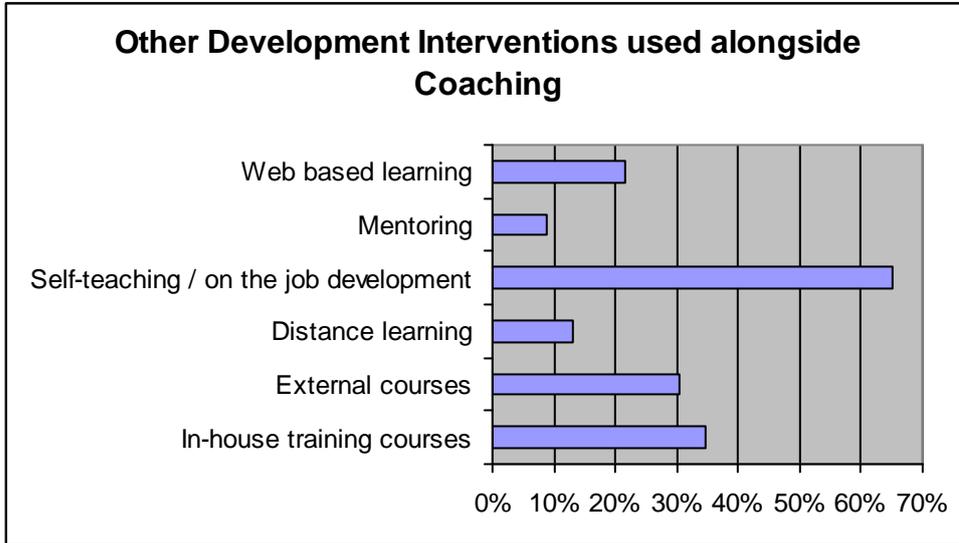


As could be predicted most of the coachees judgment on the benefits of coaching came from their own opinion with feedback from other staff. Interestingly there was limited feedback from their manager, although this would be included in staff assessment.



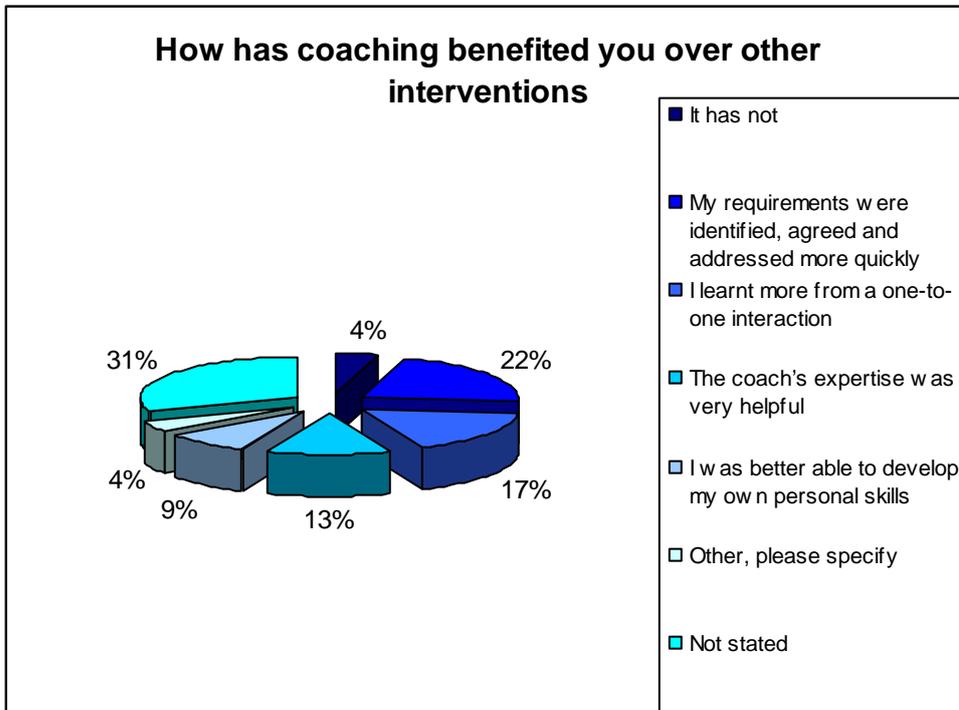
### 4.3.7. Other Development Interventions

Of those that undertook coaching the majority used self teaching and on the job development with some attendance on in house training courses and external courses.

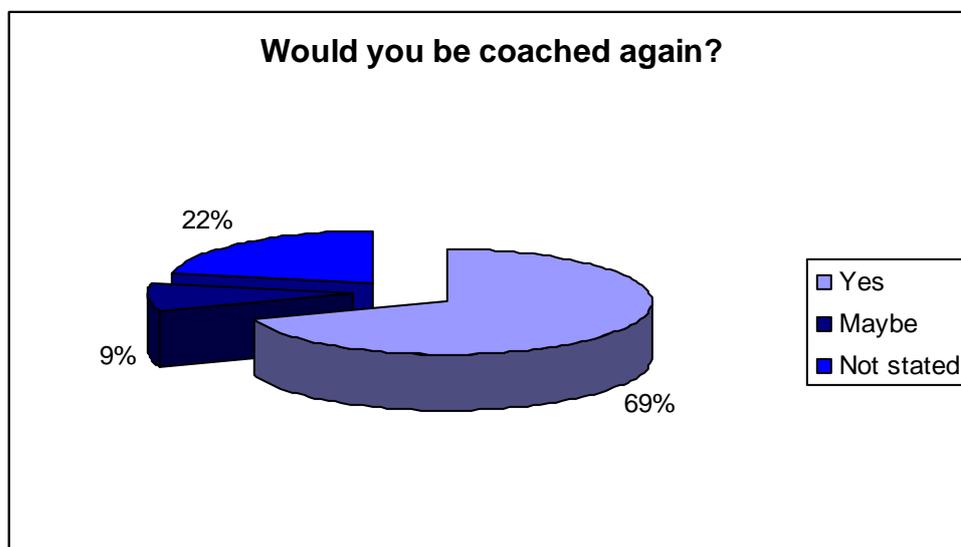


### 4.3.8. Coaching benefit

In looking at what the coaching brought to the coachee as opposed to other interventions, 22% of people felt that it helped them to learn more quickly and 17% felt that they learnt more on a 1:1 interaction. Of some concern is the 31% of people that chose not to answer this question.



In looking at coaching as an intervention to be used again, 69% said that they would and 9% said maybe. No one said 'no', although 22% of people did not state an opinion so could be presumed to be negative in their views.



Comments were given by some people to support their opinion:

- *“Coaching was individual; specific; confidential”*
- *“I learnt a lot in a short period of time that put me in good stead for the future”*
- *“It was a very useful period of learning/development for me at a critical stage of my career”*

## 5. Conclusions

In conclusion while we were unable to determine a specific ROI for coaching a number of key points were raised through conducting this survey. Firstly it seems that qualitative benefits (i.e. how a person goes about their role) such as increased motivation, work life balance and confidence are the greatest benefits coachees receive from coaching and this may well then translate into how successful a coachee is perceived at their job. For at present the majority of purchasers' state that qualitative measures are a greater determinant of job success than quantitative benefits (i.e. what they achieve). Unfortunately we were unable to determine the views of managers and it may well be that their views contrast again with those of purchasers and provide further information on why they choose coaching as a development intervention for their staff.

Secondly, a large proportion of purchasers are looking for a ROI determinant on coaching but currently do not collect data that enables this calculation- the monetary valuation of the benefit of coaching. Without this piece of information to contrast against the cost of coaching a ROI cannot be determined.

Thirdly there seems to be a disconnect between agreement to pursue with coaching, coach matching and success determination. In many cases the purchaser is acting as a knowledge broker but does not seem involved in determination of whether the coaching has been a success. This is currently predominantly based on coachee opinion which may well be biased in their desire to continue the intervention.

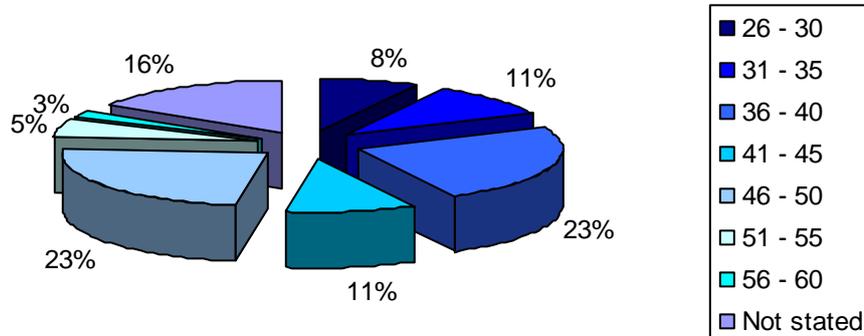
Fourthly it is clear from the coachee response in this survey that coaching has not helped them with team development and people management skills and care is needed to determine whether in fact a skills building interventions may be more appropriate in some cases. In fact it may well be that coaching helps their own personal management of themselves and this can have an impact on their people management but may need to be supplemented with some specific learnt techniques.

Finally a key role highlighted in this research is that of the manager, more work is needed to reaffirm their role in a coaching intervention and to elicit their understanding of when coaching is an effective approach.

Heather Johnston  
Association for Coaching  
October 2004

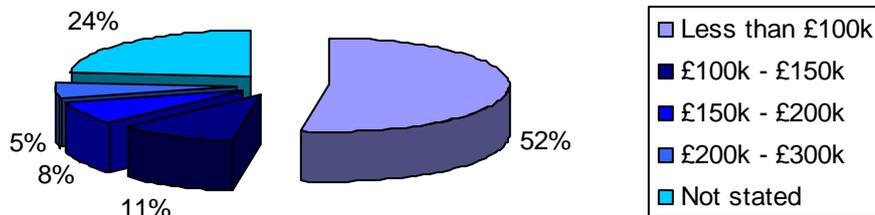
## Appendix One: Demographics

### Age Range of Participants



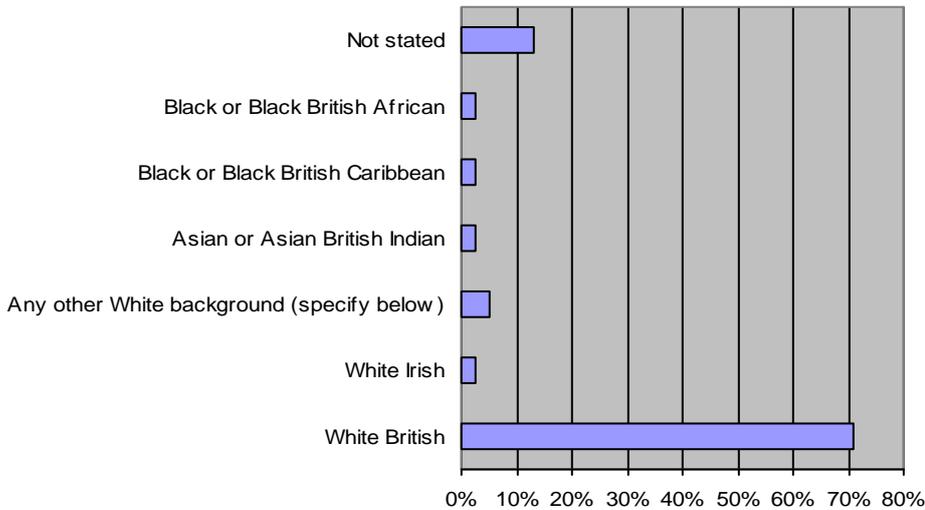
Of the 38 participants that completed the demographics page of the survey, 39% were men and 45% were women. Sixteen percent chose not to state their gender. The largest age groups were participants between 36 and 40 years and 46 to 50 years.

### Gross Annual Compensation of Participants



In terms of compensation, over half of participants earn less than 100K, although 24% chose not to declare their compensation.

### Participant's Ethnic Origin

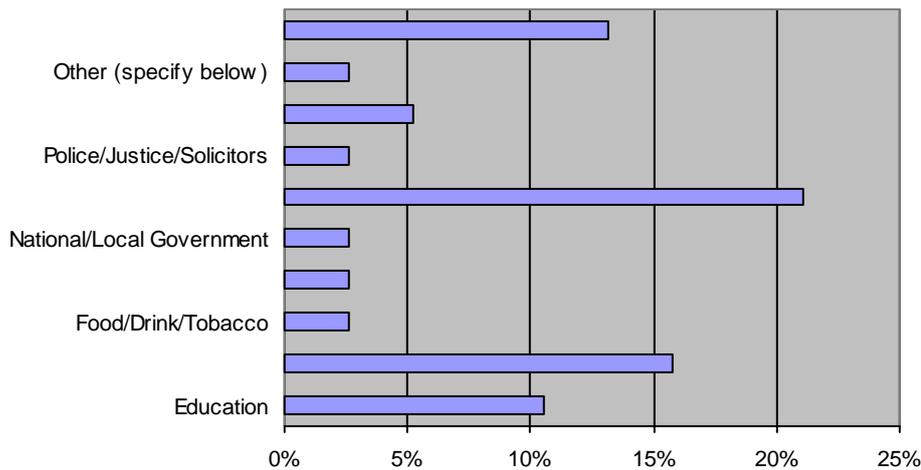


Participants in the survey were overwhelmingly of a white origin and this raises further questions as to the diversity breakdown of those that buy and participate in coaching.

Of the people that completed the survey, 39% had 2 years or less service, 37% had 3-10 years and 8% of participants had over 10 years of service and 16% chose not to declare their service.

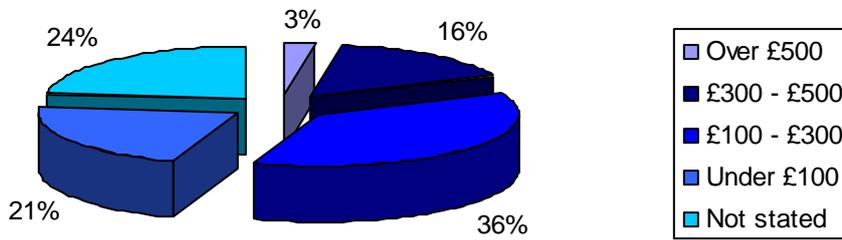
Fifty percent of participants had under 5 staff reporting to them with 13% having 6-20 staff and 16% having 20-160 staff. Three percent of participants had 160 and over staff reporting to them.

### Participant's Business Sector



Participants predominantly came from Pharmaceuticals, Financial Institutions, Consulting and Education sectors:

### Hourly Coaching Rate Paid



The dominant hourly rate paid for coaching per hour is between £100 to £300 per hour, with 16% of participants paying between £300 and £500 per hour.