

5th COACHING SURVEY

An Asia Coaching Benchmark 2019

Geography Report - Mainland China

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



Acknowledgement of Survey participants, Sponsors, Partners and the Team

We want to **thank all the Participants** who responded to the survey.

We want to **thank all our Sponsors** for their Financial and Distribution support

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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.

Geography reports written and edited by:

Hong Kong China: Mathilde Poirieux, Pansy Lam, Cynthia Chan

India: Rup Kumar Sengupta, Uma Arora

Indonesia: Ina Rizkie Amalia, Maria Eko, Hairil Anwar

Mainland China: Yanyun (Annie) Yang

Philippines: Julius Ordonez, Maria Althea Masangkay

Singapore: Taruna Aggarwal

Acknowledgement of Survey participants, Sponsors, Partners and the Team

Integrated Report written and edited by:

Taruna Aggarwal: Project Leader

Cynthia Chan: Project Support

Uma Arora: Chair, Research, APAC

We would also like to acknowledge all the earlier team members and Rainer Schmitz for their work on the first four surveys.

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Last but not the least we would like to express our gratitude to **Mr. See Luan Foo**, founder of APAC, **Dr. Anne Dolly Kuzhimadathil**, APAC President and the entire APAC EXCO for their continuous support in bringing us closer to the vision of 'being the coaching voice of Asia Pacific'.

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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 the data brings out.***
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Introduction, Methodology, & Purpose

Introduction

Purpose and Approach

- The purpose of this 5th coaching survey is to establish baseline 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 (external/internal 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, & 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 fourth one covered Mainland China, Hong Kong and India. Indonesia, Philippines and Singapore were added in the fifth benchmark study completed in 2019
- The 5th Coaching Survey was conducted from January to December 2019. The highlights of the survey findings were presented at the APAC Coaching Conference in Mumbai, India, in August 2019
- The aim is to include other Asia Pacific markets in future studies.

Introduction

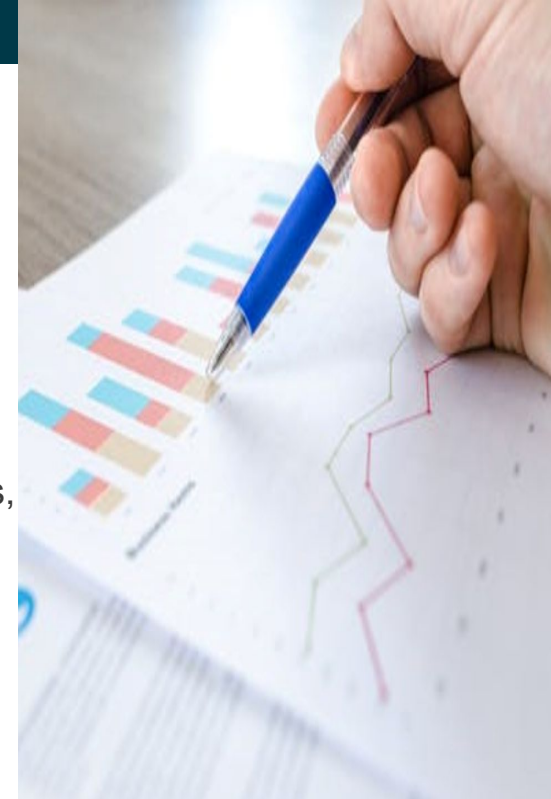
The 5th Survey...

- 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, & Bahasa Indonesia languages.
- Four coaching studies have been completed in Mainland China in 2010, 2012, 2014, and 2017 respectively. HK China and India participated in the survey for the first time last year, and this year we have added
- It is our aim to include other Asian markets in future studies.

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 / Organizations | External Coaches | Internal Coaches
- **Markets:** Hong Kong China, India, Indonesia, Mainland China, Philippines, Singapore
- **Languages:** English, Mandarin, & Bahasa Indonesia
- **Analysis:** Comprehensive and by Markets



The Participants

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 / Organizations 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.



	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
Companies / 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

Mainland China Participation – Progress over the years

Mainland China Survey 2019

	2010	2012	2014	2017	2019
Total Participants	81	146	254	205	355
Organizations	43	55	71	70	145
External Coaches	38	68	148	111	162
Internal Coaches	NA	23	35	24	48

Thank you Sponsors

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Stretching Oneself To Go The Distance.

Enrichment Introduction

Enrichment Consulting and Coaching Institute provides professional coach training for empowering professionals in leadership, entrepreneurship, as well as corporate and family coaching via our Professional Coach Program (PCP), the first Chinese original coach training program recognized by the International Coach Federation (ICF) for 275 ACTP hours.

We also provides professional coaching services in the fast developing economy of China for businesses, teams and individuals, and have worked with clients in education, IT, industry, and finance.

We are proud to be the first and only Silver Sponsor of the Institute of Coaching (affiliated with Harvard Medical School) from China

Number of Professional Coaches Trained by Enrichment:

Nearly **500+** Professional Coaches
Nearly **68+** ICF ACCs



Highlights from the 10th Anniversary Gala

Coach Link: Non-profit organization to support the development of coaches



Love Believe: Coaching in life education



1623 1623 participants joining
54 events from 2015 to 2018

Geographical Coverage

Working diligently in the coaching industry for a decade, Enrichment, founded in **Hong Kong**, has now established offices in **Shenzhen, Shanghai, Beijing, and Chengdu**.

Corporate Coaching



Contact: nicholas_wai
Email: nicholas.wai@enrichment.org.cn

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Top 8 Trends/Insights

Top 8 Insights - Part 1

1. Growth in Coaching services - 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.

For Mainland China:

- **68%** of the companies are using coaching in Mainland China compared to overall 75%.
- Top 3 reason for Mainland China companies unlikely to introduce coaching are **coaching concept not well known, cost and lack of support from top management** while overall report indicates that the top 3 reason are coaching concept not well known, cost and other HR development tools in use.

Given the barriers that may be stopping companies from adopting coaching, what strategies can coaches have to promote awareness and concept of coaching to top management and community?

How do professionals in the field manage the cost benefit arbitrage as perceived by the companies?

Top 8 Insights - Part 2

2. 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.

For Mainland China:

- 65% of companies work with a combination of ECs and ICs, while 28% engage ECs only (vs 23% for overall) and 7% almost fully dependent on ICs (vs 8% for overall).
- Top 3 factors for Mainland China companies choosing coaching service by ECs or ICs are **cost efficiency, experience with ICs** and **ROI**.
- There is an agreement on the practice of using more ECs for senior management and ICs for lower management. There are marked differences in how benefits of internal coaching vs. external are perceived.

How to measure ROI for coaching service by ECs and ICs effectively?

How do ICs build credibility of confidentiality and neutrality within companies?

Top 8 Insights - Part 3

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

- Survey points out that while companies want to create internal capability for coaching, almost half of 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.

For Mainland China:

- For **85%** of organizations, coaching is less than **50%** of the IC's job responsibilities.
- While **70%** ICs agree that coaching is part of their job & development, **33%** not linked to performance review and only **6%** feel it is linked to compensation and benefit.
- More ICs feel that ECs mainly provide coaching services to senior management and ICs provide coaching services to lower management.

How to build a supportive culture for ICs to ensure quality and quantity of ICs?

How to leverage knowledge of ICs and external perspectives of ECs to make coaching intervention more effective?

Top 8 Insights - Part 4

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

For Mainland China:

- On an average ECs received 161 hours of coaching specific education and training while ICs receive 118 hours, both longer than overall.
- Training accredited/approved by professional coaching organization is the major channel for both ECs (70%) and ICs (58%) to get trained or educated on coaching.

Top 8 Insights - Part 5

5. Influence of culture on the understanding of Coaching in Asia

The survey reconfirmed the observation from the 4th Coaching Survey that coaching is perceived slightly differently in Asia. Both companies and coaches acknowledge elements of guidance and expertise sharing involved in coaching. This comes out stronger from companies.

For Mainland China:

- 31% of companies still feel that coaches should provide advice and guidance to coachees, while 43% for overall.
- 30% of companies also expect that coaches give instructions to the coachees.

How can coaching professionals in Mainland China follow coaching beliefs and meet company expectations simutanously?

Top 8 Insights - Part 6

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.

For Mainland China:

- **51%** of companies rated quality of coaching as “good” and “very good”, while the number was **66%** in the 2017 survey, a drop of **15%**.
- **69%** of companies chose 360° feedback before and after coaching assignment to measure coaching success while only **48%** of ECs and **28%** of ICs chose it as evaluation tool.
- More than **90%** of companies in Mainland China who responded see some positive impact of coaching on all company metrics including employee engagement and retention, personal and organizational performance, and profitability.

How can tripartite contracting and benefits measurement be done more effectively among companies, coaches and coachees to have clearer agreement of expected coaching benefit outcomes?

Top 8 Insights - Part 6

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

- **Effectiveness of coaching process:** Organizations 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 3 areas as in 2017 survey data.
- **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).

For Mainland China:

- About **50%** of companies reported to have requested for coachees' assessment results and specific coaching content from coaches.
- Coaching experience is the most important selection criteria.
- Comparing to other markets, companies in Mainland China considered language is more relevant to coach selection than coach-coachee chemistry and credential.

Top 8 Insights - Part 7

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.

For Mainland China:

- Majority of coaches in Mainland China (83% EC and 87% ICs) are not using any technology- or AI-base coaching tools.

With the latest situation of corona virus, how will technology evolve to meet the increasing needs of online coaching?

Top 8 Insights - Part 8

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.





For Mainland China:

- Companies in Mainland China also plan to increase focus on building in-house coaching capability, such as coaching in leadership development, business strategy, organization culture, etc. And willingness of increase of use of coaches (49% for ICs and 29% for ECs) and increase of budget (32%) ranked much lower than the “hard” capabilities.

In view of the COVID19 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 Jan 2020.

Demographics

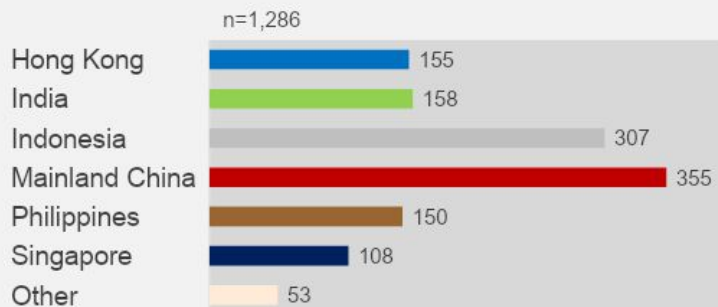
Participants Overview & Distribution

Markets 	Hong Kong China	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%
	Chinese	258	20%
	Bahasa Indonesia	77	6%
	Total	1,286	100%



Participants Overview & Distribution

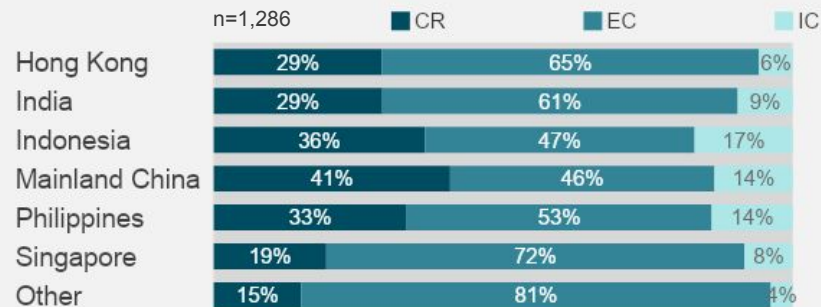
Country



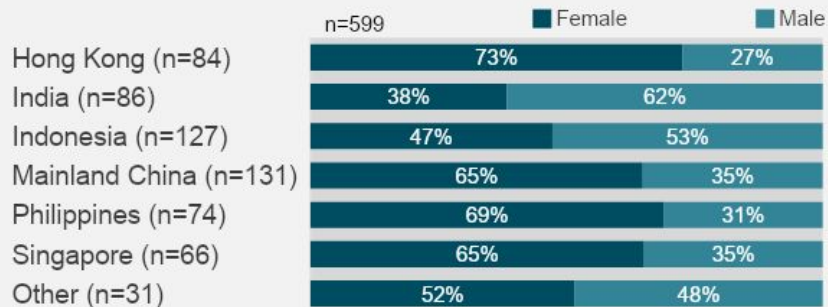
Role



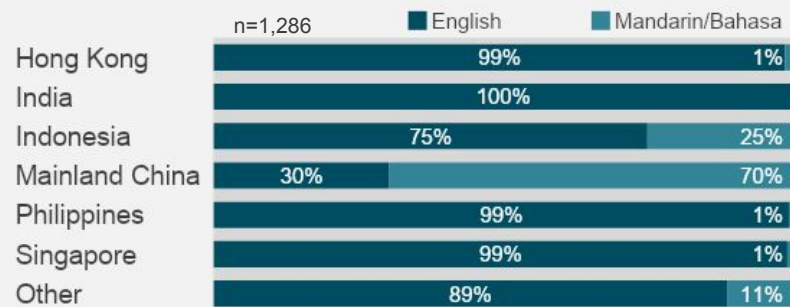
CR= Company/ Org Representative, EC= External Coach, IC= Internal Coach



Gender (EC & IC)



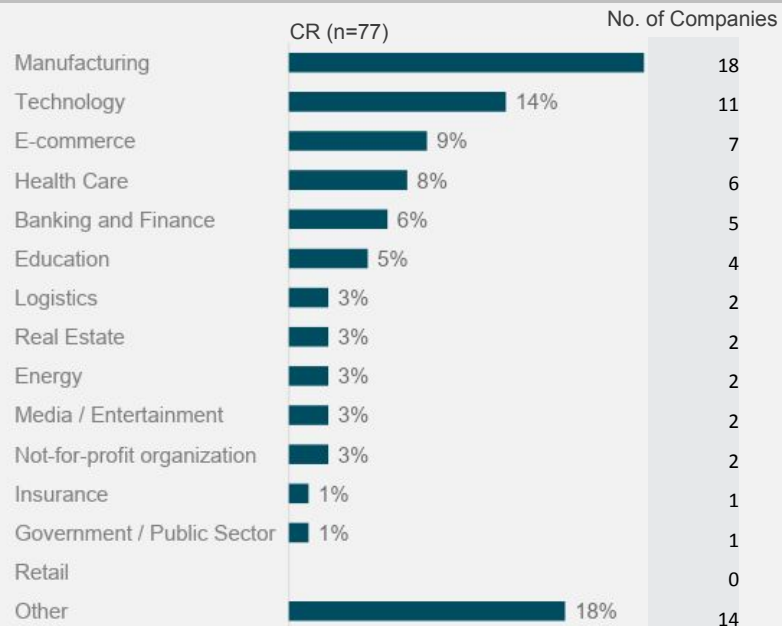
Language used for Survey



Participating Organizations - Distribution by industry sector and type

Well diversified sample from multiple sectors, majority in manufacturing.

Q. What industry sector does your Organization operate in? (Multi Choice)



The survey indicates a well diversified sample from a large number of industry sectors. The highest CR respondents came from Manufacturing (23%), Technology (14%) and E-commerce (9%) sectors in Mainland China.

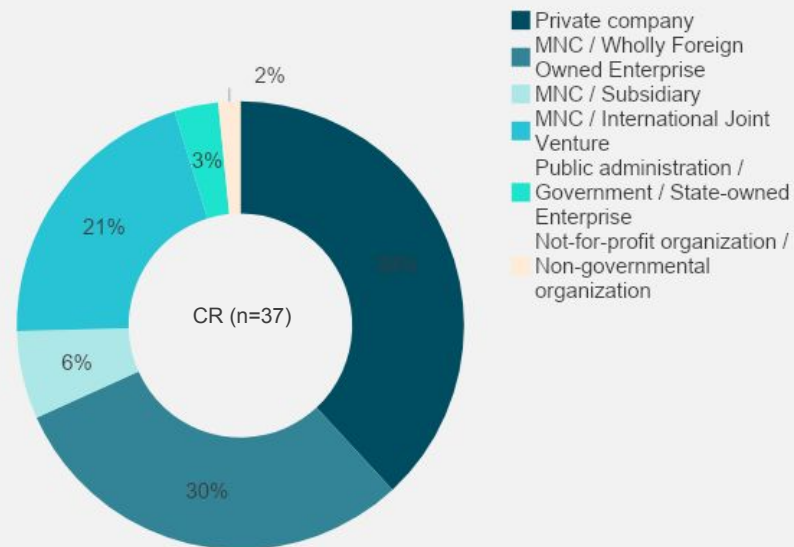
Participating Organizations - Distribution by industry sector and type

MNCs and Private companies constituted the largest proportion of respondents.

3 types of MNCs constituted a total of 57% of the sample followed by Private companies 38%.

MNCs are the largest participants.

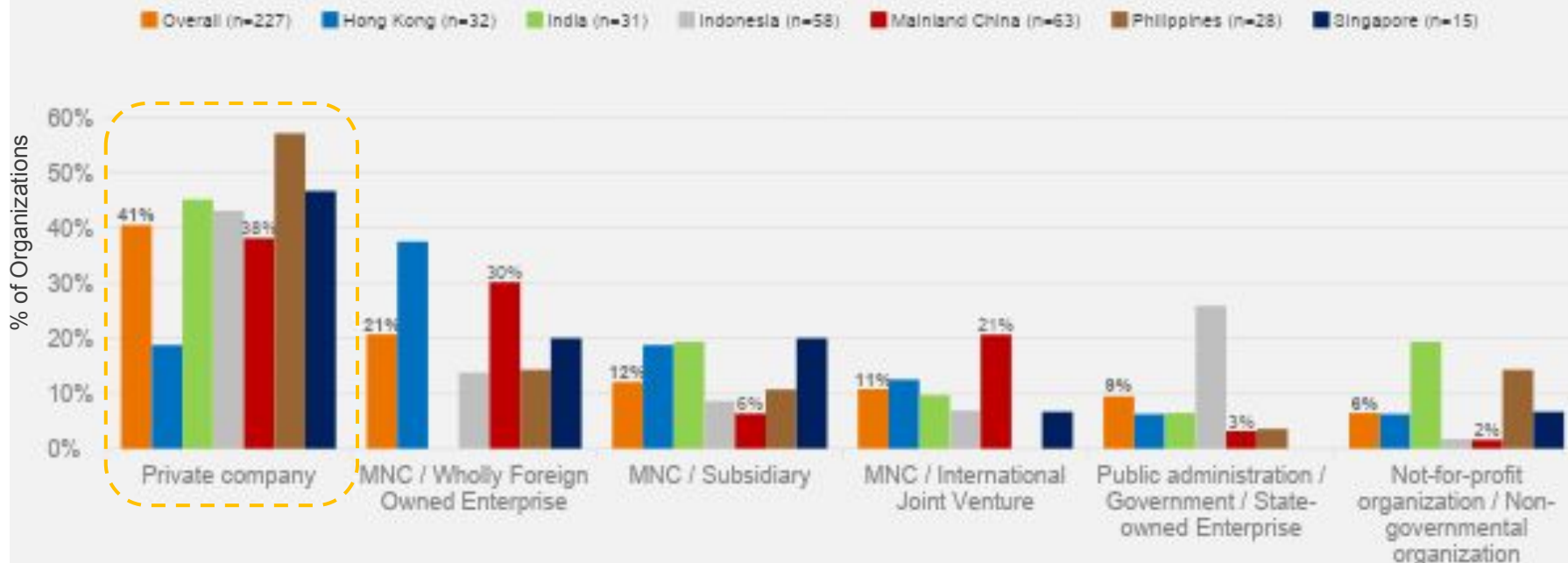
Q. What is your company status?



Comparison on Types of Participating Organizations

In the 2017 Survey, 73% were MNC companies compared to 44% in this sample.

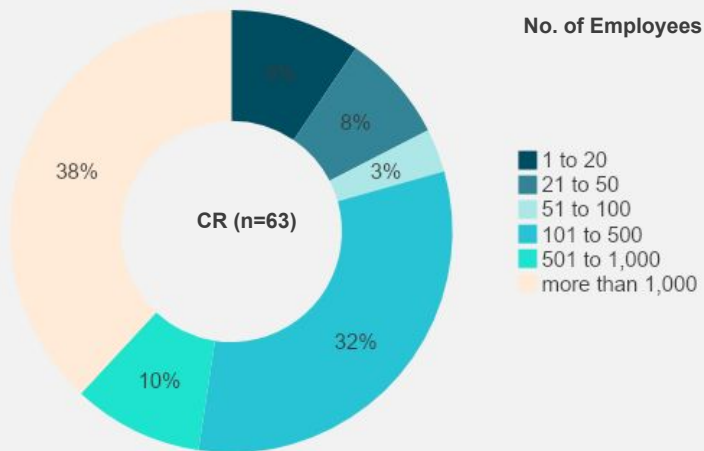
Q. What is your company status?



Participating Organizations – Distribution by Employees and Revenue

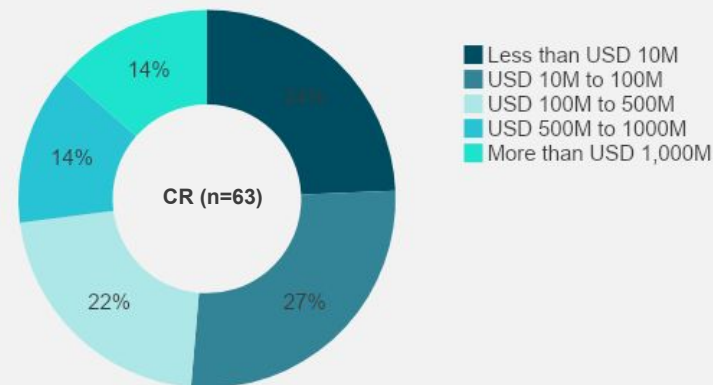
80% of the organizations employ more than 100 people

Q. How many people does your company employ locally?



Well Diversified sample from varying revenue brackets

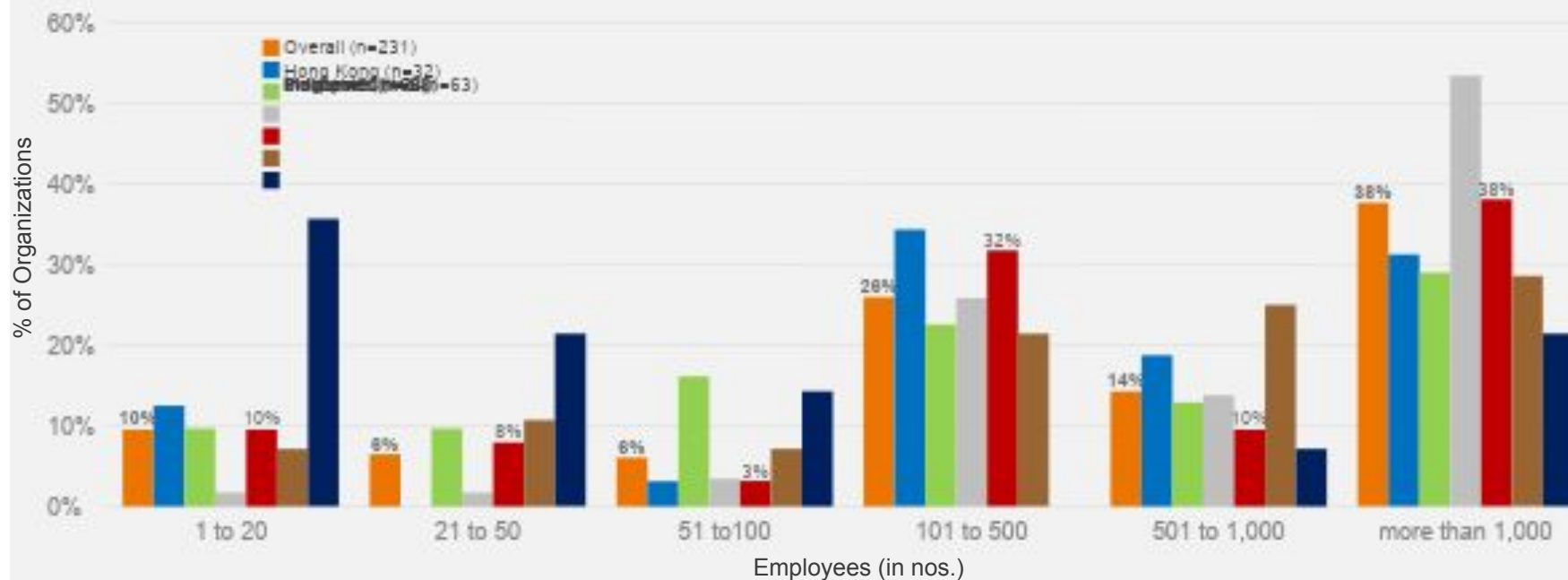
Q. What is the company size in terms of revenue in USD million per year (local market only)?



Participating Organizations by Number of Employees

Employee population sample size varied in different markets.

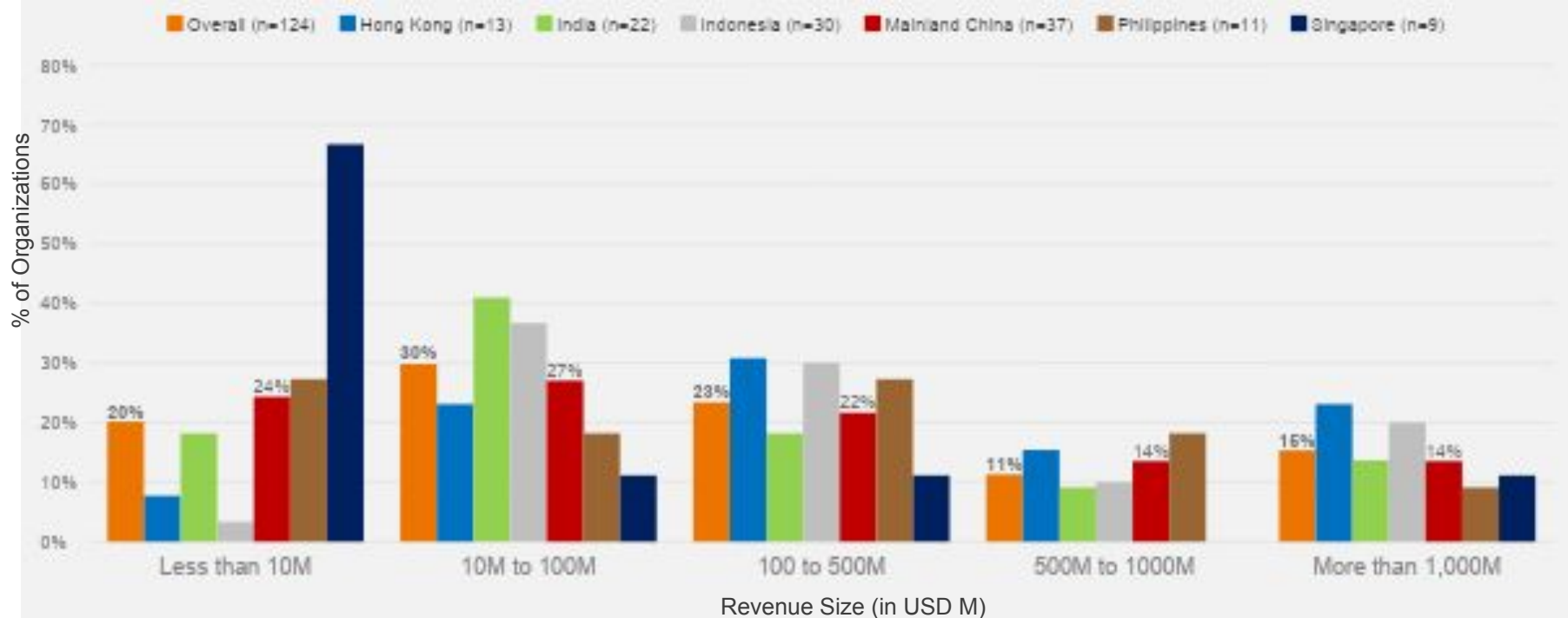
Q. How many people does your company employ locally?



Participant Organizations by Revenue Size

Market –wise breakdown

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



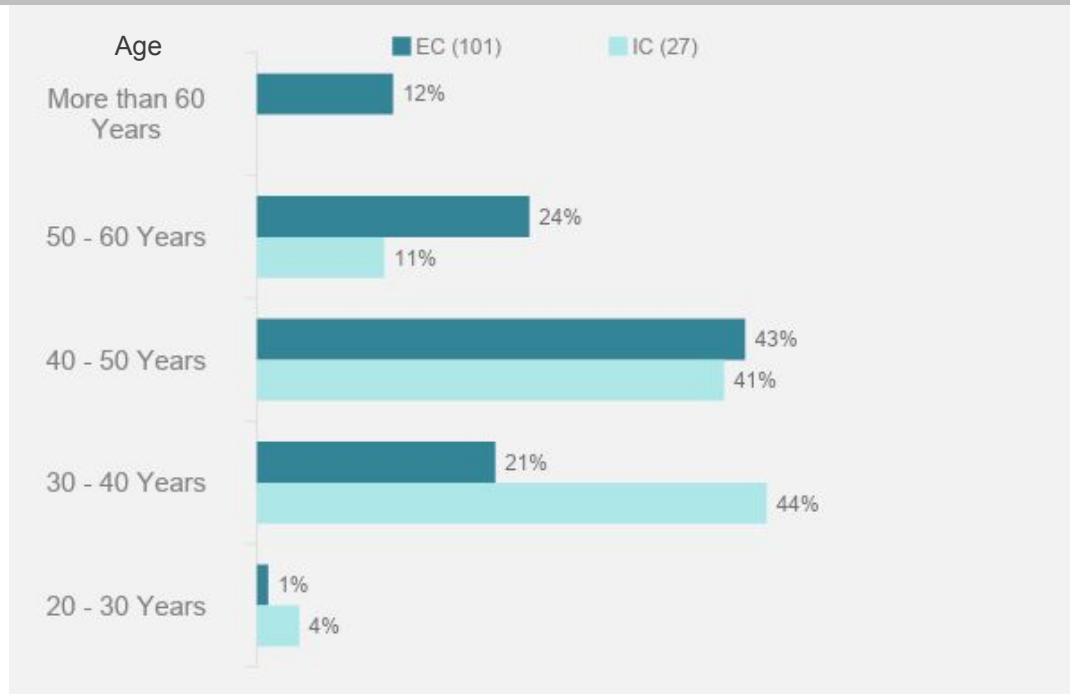
Distribution of Coaches by Age

Median age of an EC in Mainland China is 46 Years vs 39 years for IC.

Q. What is your birth year?

43% of the ECs are in the range of 40-50 years, 24% are 50-60 years, 22% are below 40 years and only 12% more than 60 years.

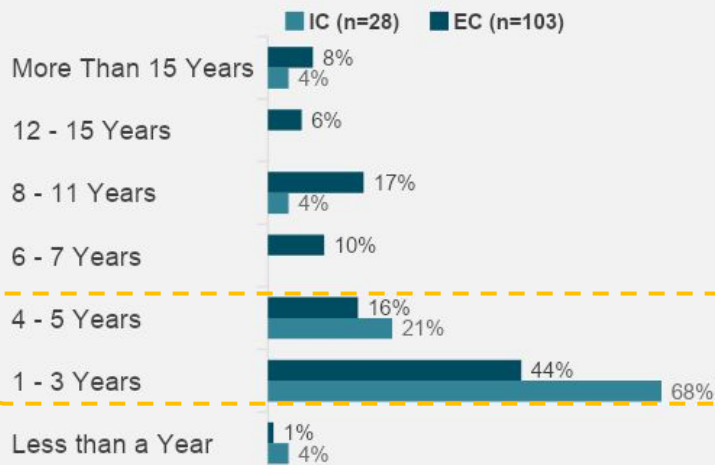
48% of the ICs are below 40 years, 41% are 40-50 years, 11% are 50-60 years and no more than 60 years.



Distribution of Coaches by Years of Experience

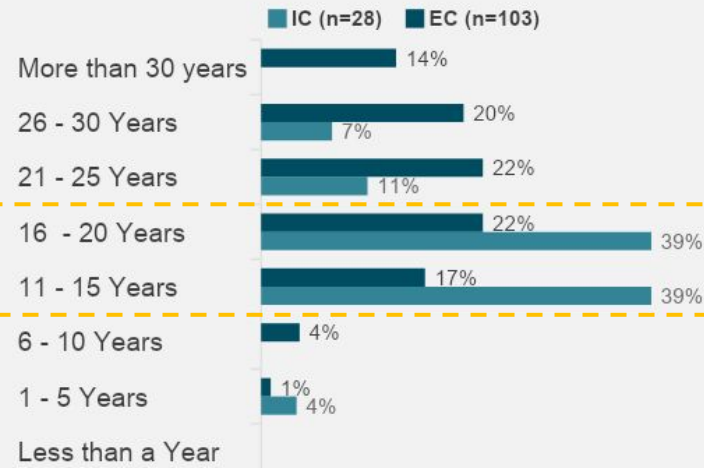
ECs have average coaching experience of 6.7 years , ICs have average coaching experience of 3 years.

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



ECs have average work experience of 23 years , ICs have average work experience of 17 years.

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



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?

Typical EC Participant

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

	Female Coaches	Average Age (Yrs)		Coaching Experience (Yrs)		Overall Work Experience ≥ 20 years
		Median	Mean	Median	Mean	
Hong Kong China (n=76)	74%	51.0	50.5	8.0	9.1	80%
India (n=76)	39%	52.0	52.9	8.0	9.9	85%
Indonesia (90)	54%	46.5	46.9	3.0	5.7	60%
Mainland China (n=103)	67%	46.0	46.3	4.0	6.8	72%
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

Typical IC Participant

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

	Female Coaches	Average Age (Yrs)		Coaching Experience (Yrs)		Overall Work Experience ≥ 20 years
		Median	Mean	Median	Mean	
Hong Kong China (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%	42.0	43.2	3.0	5.0	50%

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

Landscape of Coaching Market

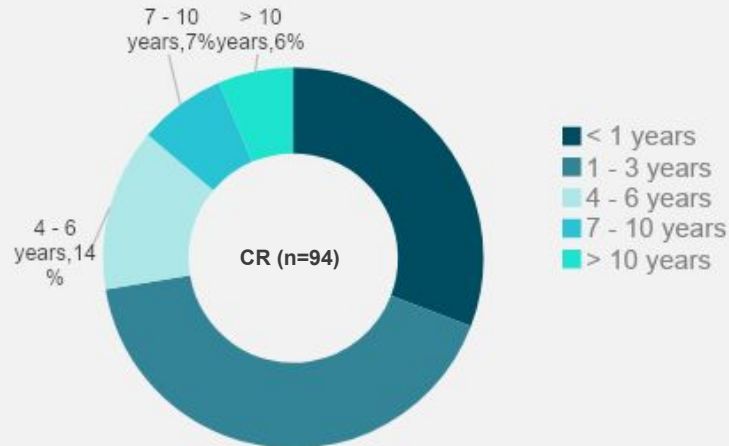
Prevalence of Coaching Services

For the sample of organizations reached, Coaching is a relatively young concept as 73% of the Organizations have used Coaching for less than 3 years.

Q. How long your company has used coaching in your market location?

Only 6% companies have used coaching service for more than 10 years, 21% for 4-10 years and 73% for 3 years or less.

This may indicate a recent growth in companies using coaching.

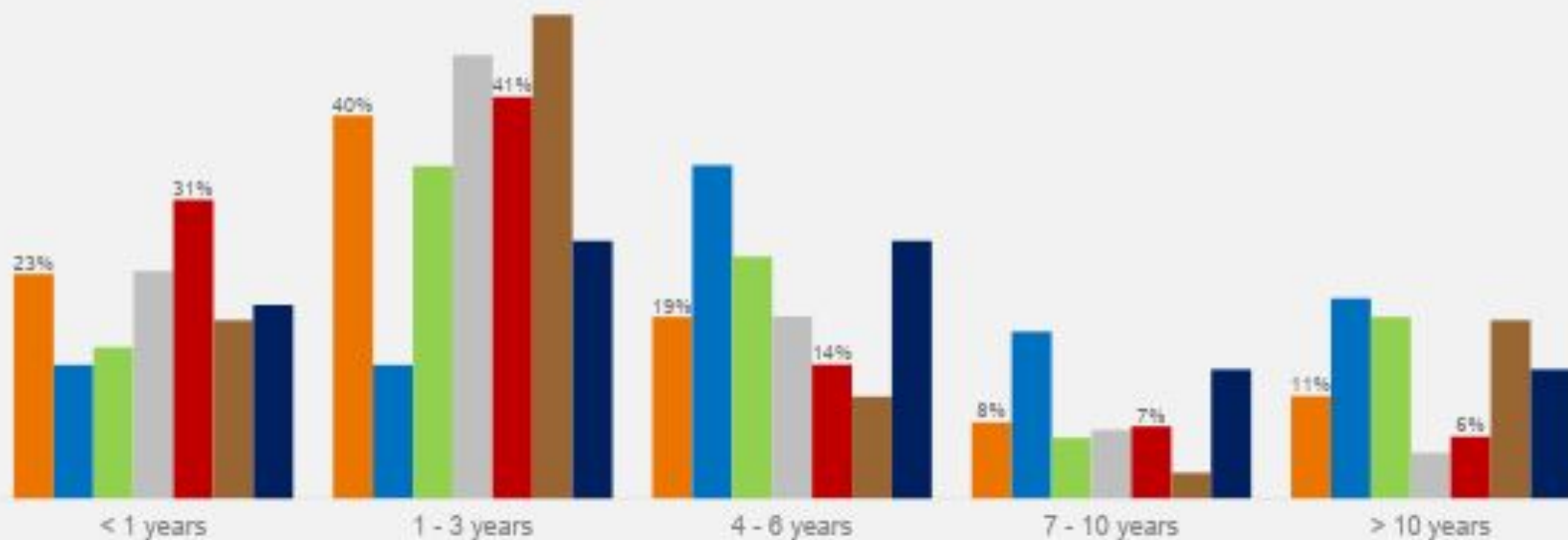


Prevalence of Coaching Services – By Market

Coaching is a young industry as 72% of the organizations have used Coaching for less than 3 years in Mainland China, higher than overall.

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

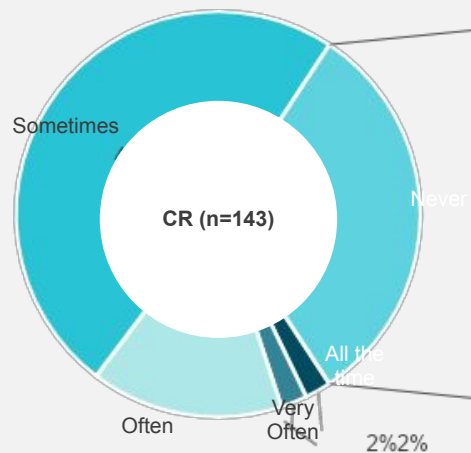
Overall (n=293) Hong Kong (n=29) India (n=32) Indonesia (n=85) Mainland China (n=94) Philippines (n=38) Singapore (n=15)



Adoption of Coaching

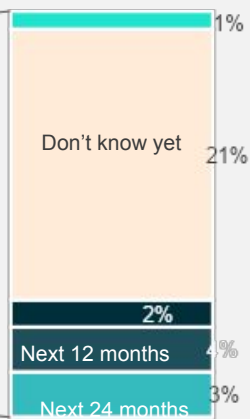
Organizations that have used Coaching "Sometimes" and "Never" comprise 81% of the market and reflect expansion opportunity.

Q. How frequently does your company use coaching services?

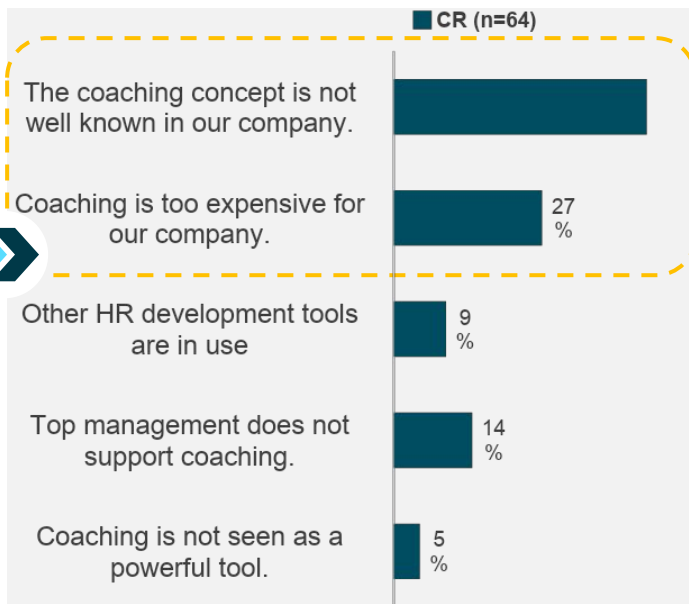


Q. If Never, would you like to introduce coaching in your company ?

Not at all



Q. Reasons why your company is unlikely to introduce coaching



Adoption of Coaching

Organizations that have used Coaching "Sometimes" and "Never" comprise 81% of the market and reflect expansion opportunity.

Q. How frequently does your company use coaching services?

Q. If Never, would you like to introduce coaching in your company ?

Q. Reasons why your company is unlikely to introduce coaching

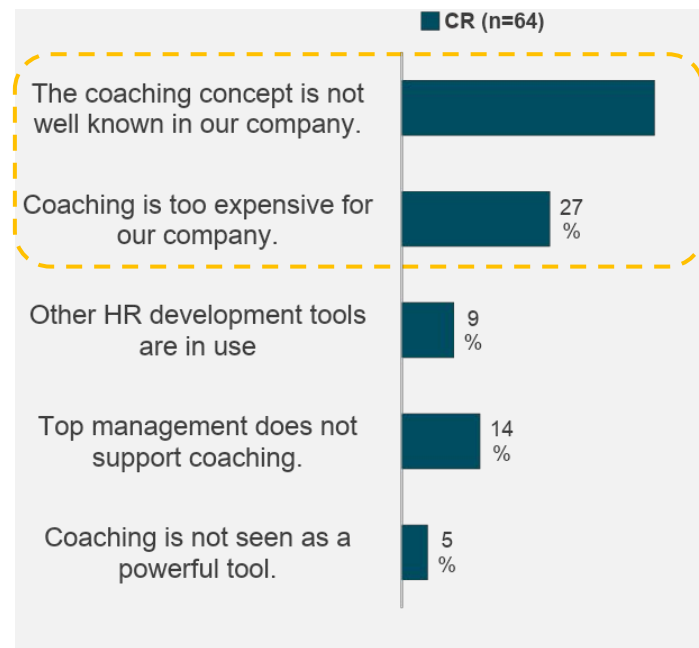
About 32% of the companies reached this year have never used coaching services. Out of the 32%, roughly one-third have planned to use coaching services, while two-thirds indicated that they are unsure.

The top 3 reasons for the companies not to introduce coaching are lack of awareness in the company, high cost and lack of support from top management.

Something to ponder:

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

Can technology play a role in making coaching more cost effectively?



Usage of Coaching Services - by Market

69% of organization that participated have used coaching services, lower than overall.

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



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

Coaching Services Adoption by Type of Organization

Majority of participants are MNCs and local private companies.

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

Coaching seems to be permeating deeper and expanding into all company types.

While MNCs and private companies are the largest sector using coaching service, a few government and public sector companies and NGOs reached have used coaching services.

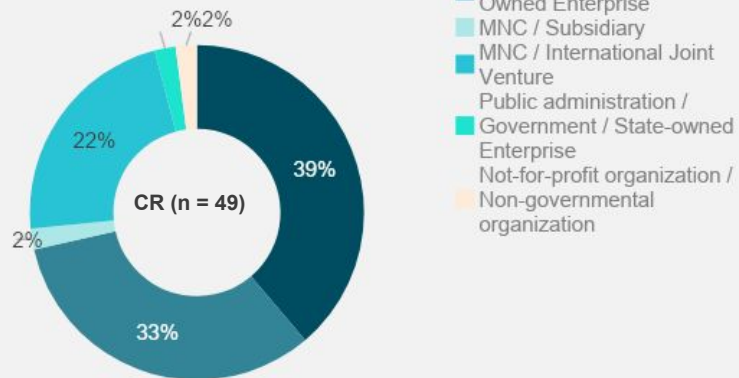


Target Clientele

ECs clientele is aligned with where the demand for coaching services is originating, particularly in case of Private Companies. Also, 58% of ECs have Self-Paying clients as well as 39% as Start-up entrepreneurs.

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

Organizations that indicated that they used coaching services while answering the "frequency" part of the question



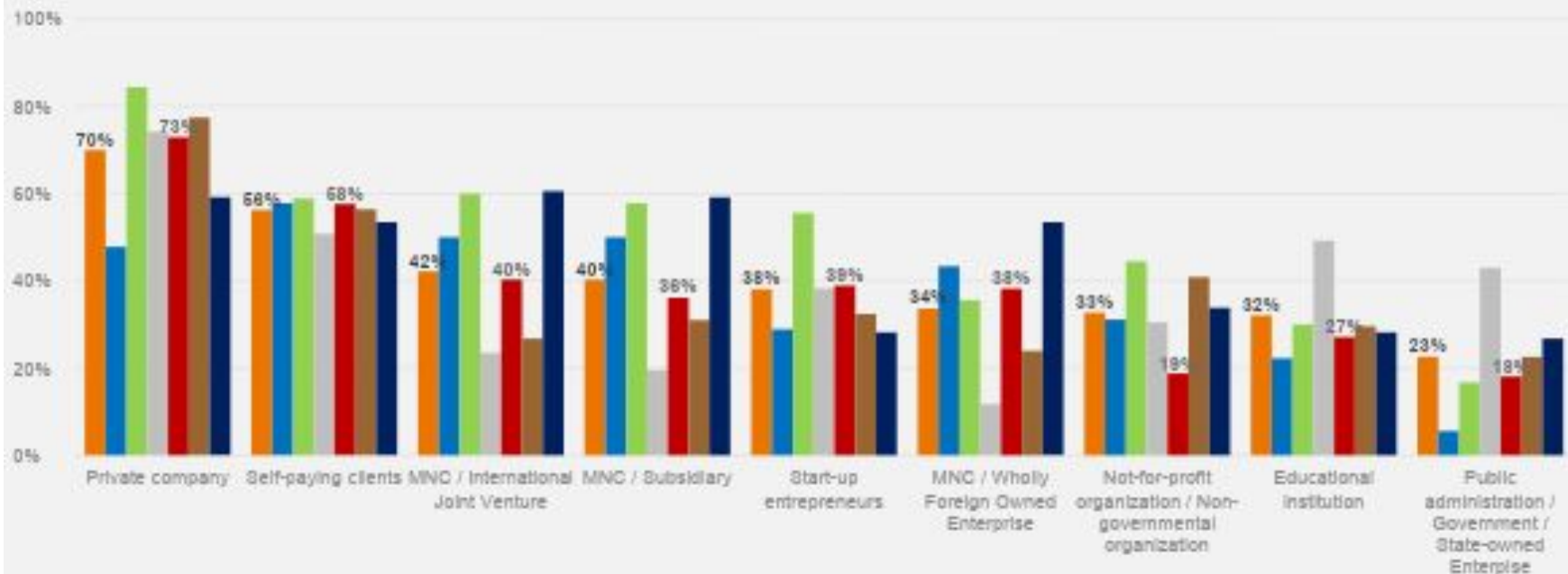
Q. Please describe the type of organizations you typically work with. (Multiple Choice)



EC Target Clientele – By Market

Most ECs have Private Companies and Self-paying clients. Coaching adoption in non-profit sector in Mainland China is much lower than other markets.

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 Local company and Self-paying clients

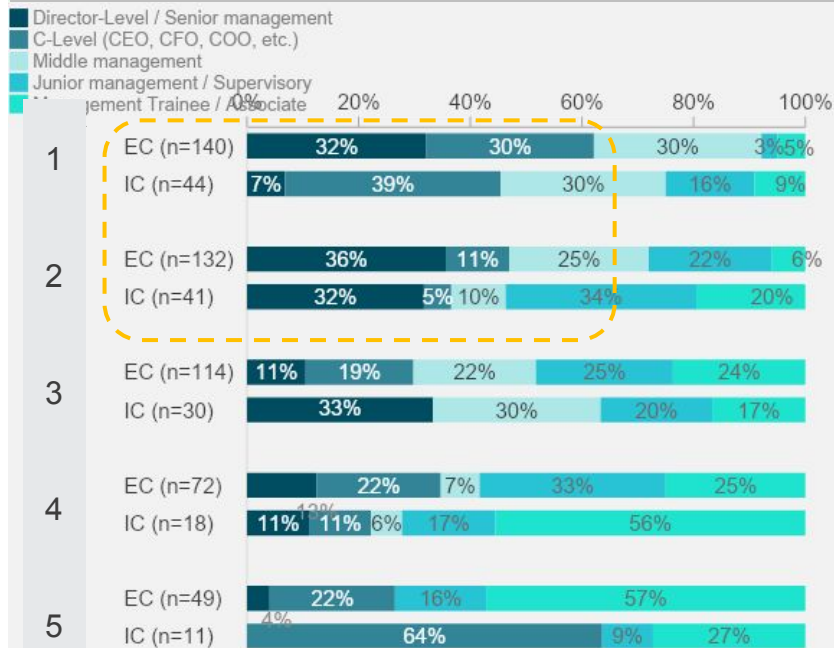
Target Groups for Coaching Services

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

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



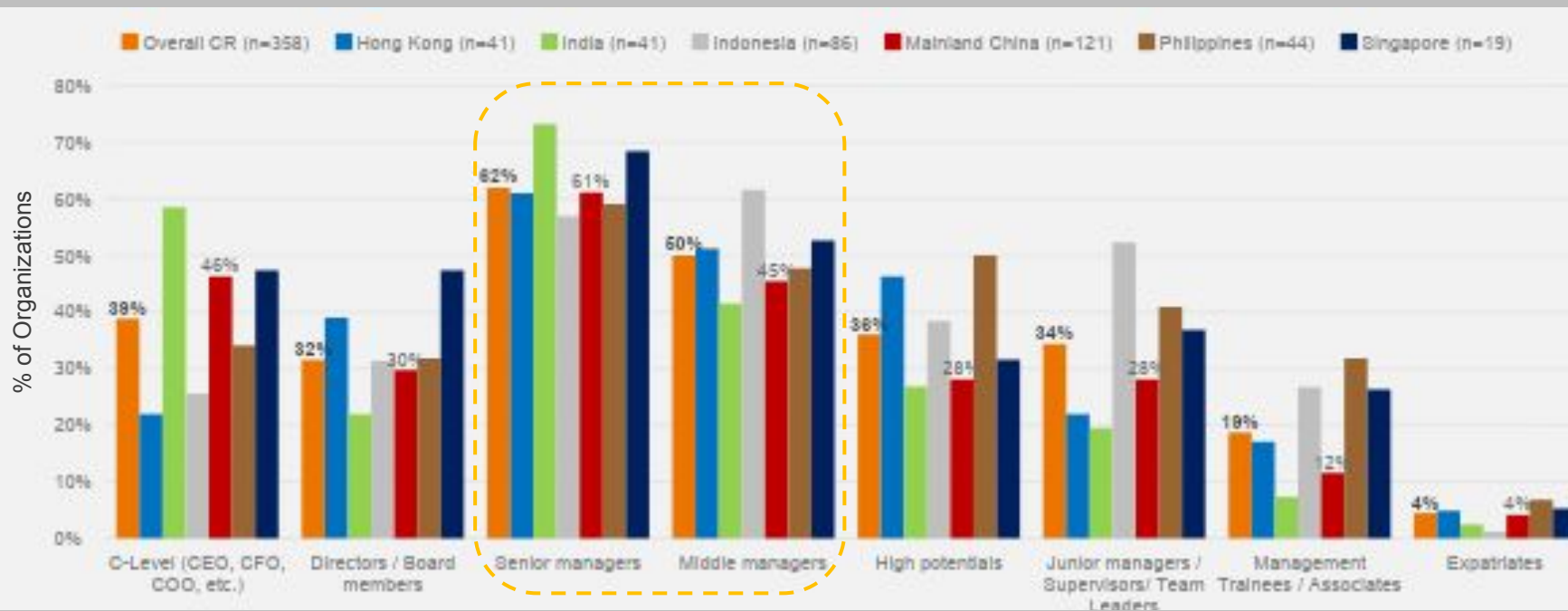
Q. Please select and rank the corporate level/position of your coachees. (Multiple Choice)



Target Groups for Coaching Services - By Market

The greatest need for coaches is in the level of senior managers across all markets.

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

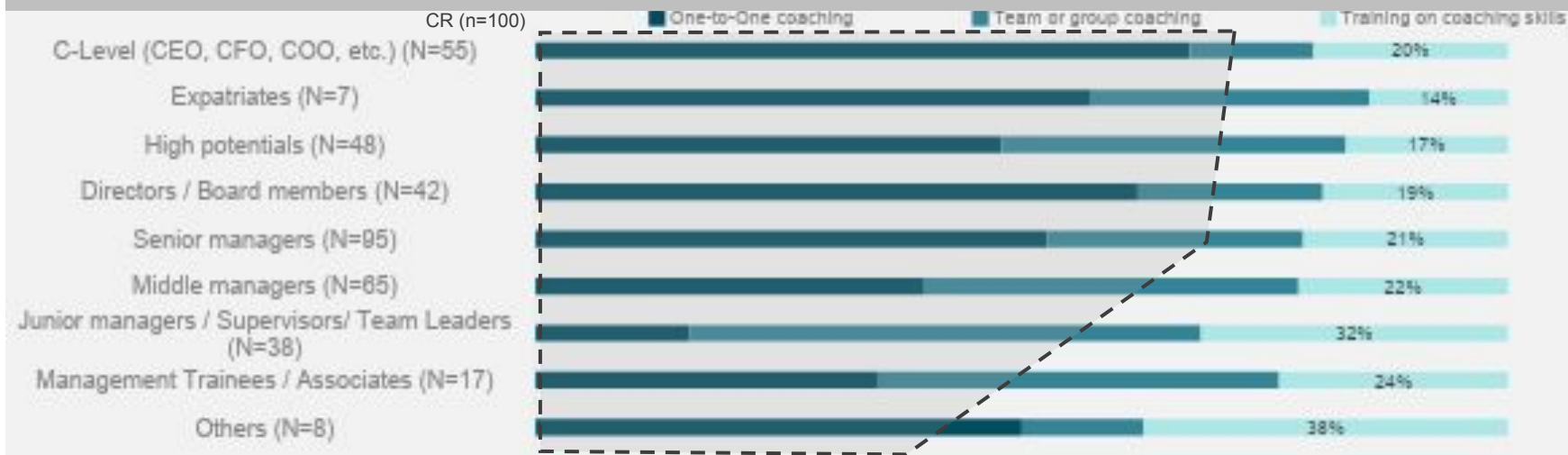


In the 2017 Survey, Organizations offered coaching to all management levels. Senior management level is targeted more for coaching in China than in HK and India

Type of coaching intervention - By Target Groups

As the seniority goes up, coaching becomes more “One-to-One” focused.

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



Coaching services are offered to all management levels. One-to-one coaching is still the major intervention offered.

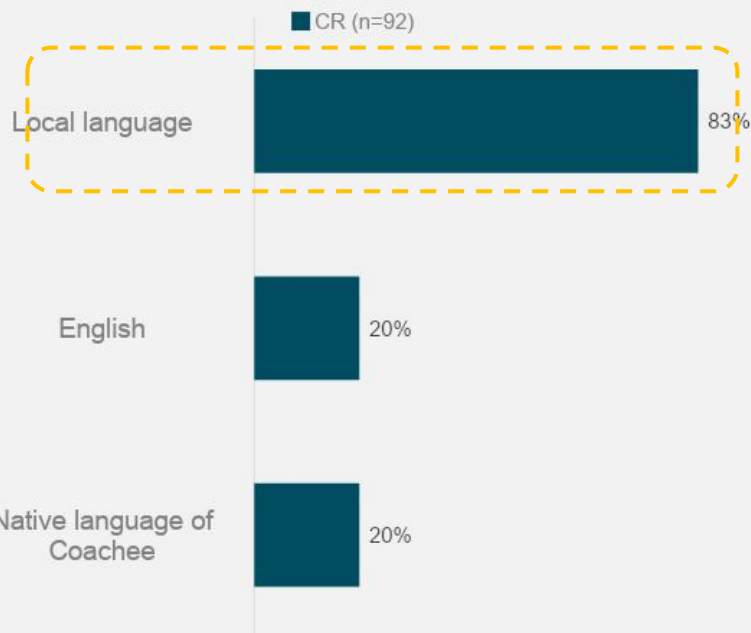
Something to ponder

It's encouraging to see that companies are offering coaching skill training at all levels. It will be interesting to explore how companies are integrating it with talent development strategy.

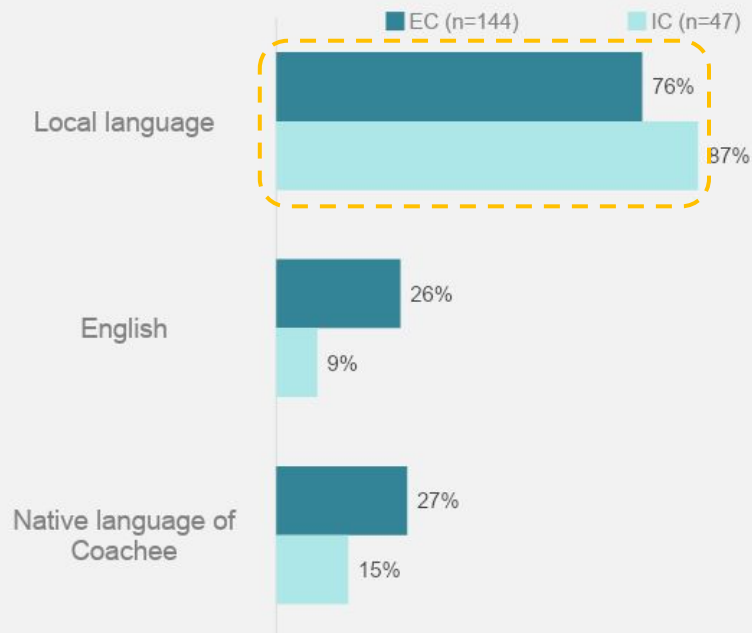
Preferred Language for Coaching

Local language is the most used language for coaching.

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



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



Coaching Rates

Coaching rates differ by markets. Coaching rates of ECs in Mainland China are much lower than that in Singapore and HK.

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)



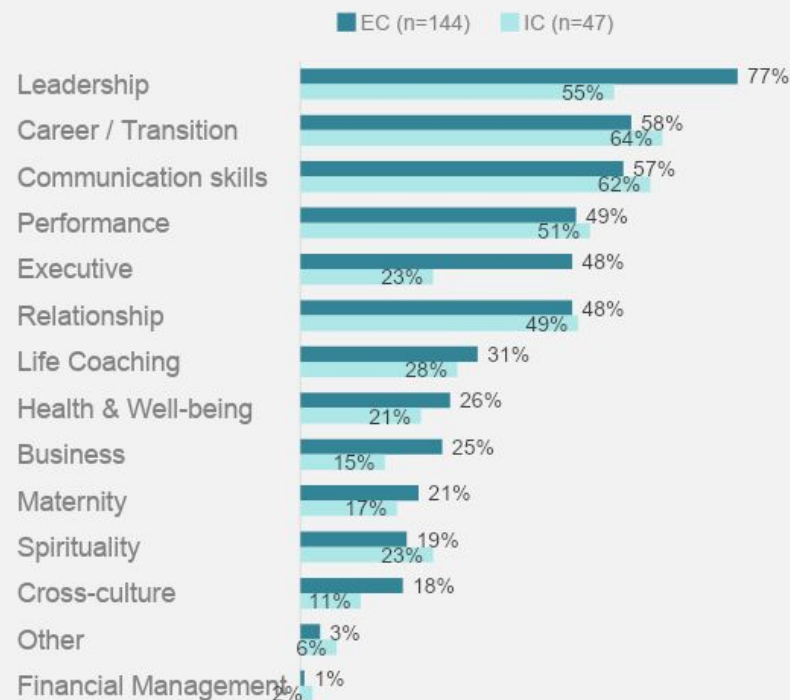
Coaching Specializations

Significant overlap in the areas that ICs and ECs are specializing in. Though ECs are more wide spread and they are creating new niches for themselves.

Q. What are your coaching specializations?

The top 3 coaching specializations for ECs are Leadership, Career/Transition, and Communication skills. ICs have different focus with different ranking as Career/Transition, Communication skills and Leadership.

Executive is another important area of ECs, which ICs have much less focus.



Range of Coaching & Related Services

ECs do more group coaching and consulting than ICs.

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

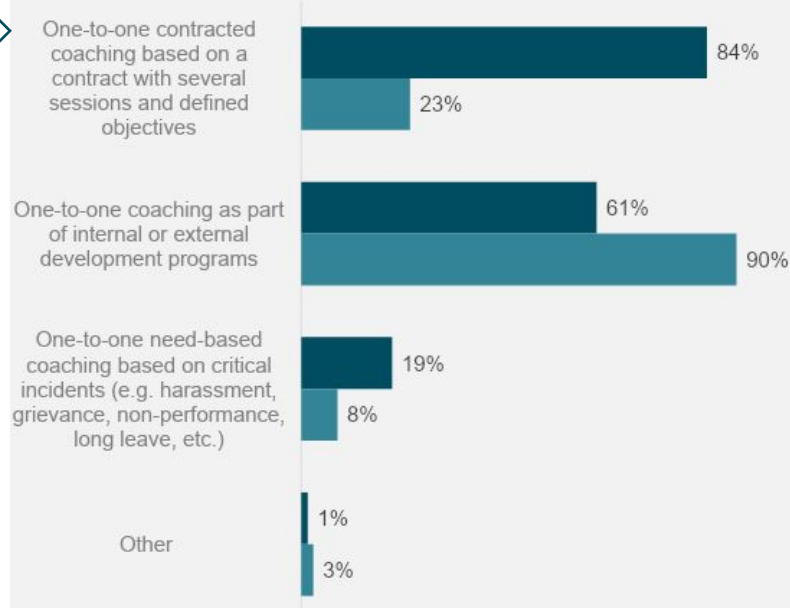
■ EC (n=161) ■ IC (n=49)



ECs offers more of contracted based coaching with several sessions and defined objectives

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

■ EC (n=149) ■ IC (n=40)



Proportion of Work-time Devoted to Coaching Sessions

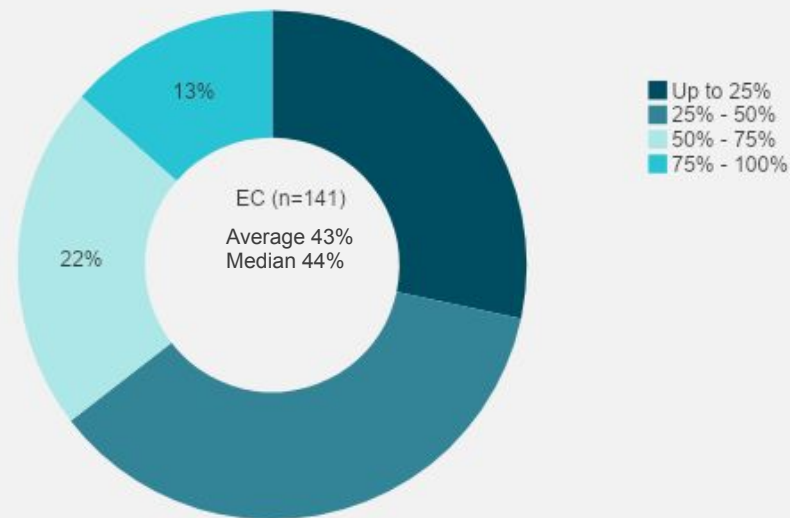
For ECs, an average 44% of the time is spent on coaching sessions

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

Only 35% of ECs reached spent more than 50% of working time on coaching sessions.

Something to ponder

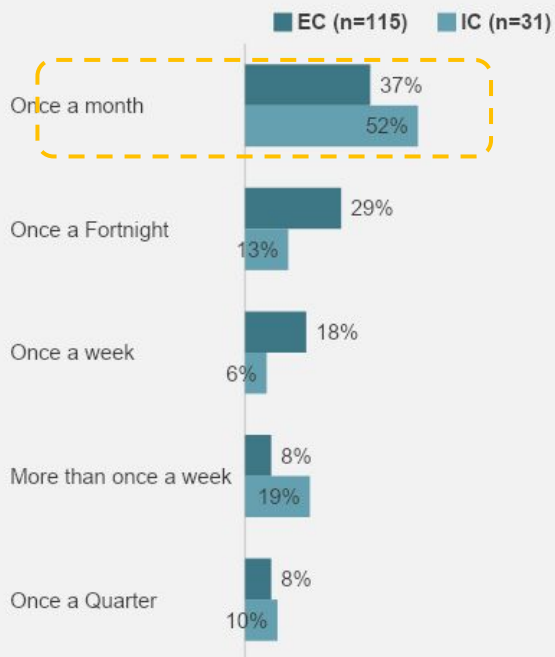
Other capability sets may be required for ECs to develop themselves. What are they?



Frequency and Duration of Coaching Assignments

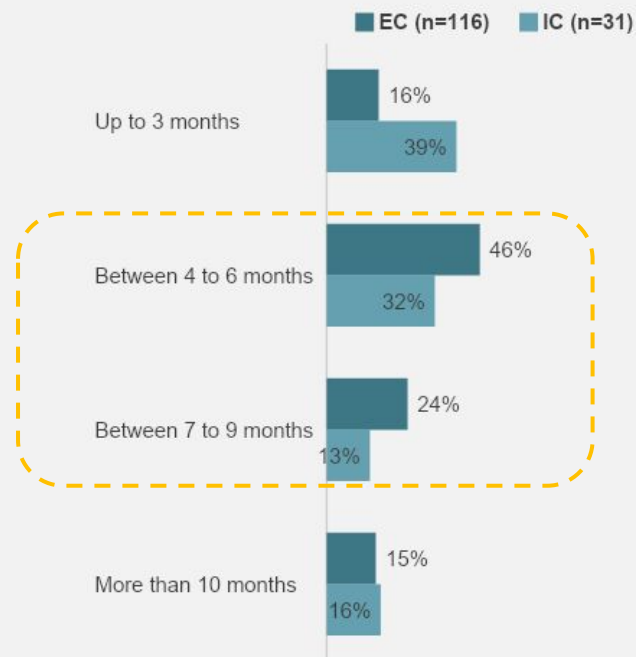
ECs do more frequent coaching assignments.

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



ECs have much larger average duration of coaching assignments.

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

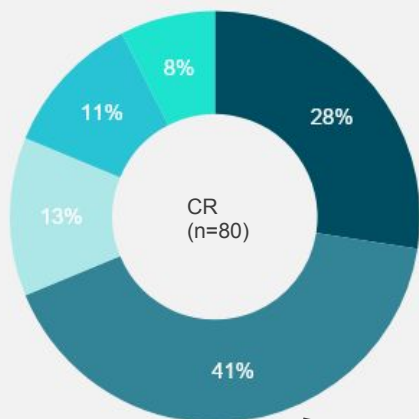
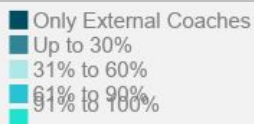


Engagement and Perception of Internal Coaches

28% of companies engage only ECs to meet their coaching needs while 7% are almost fully dependent on ICs.

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

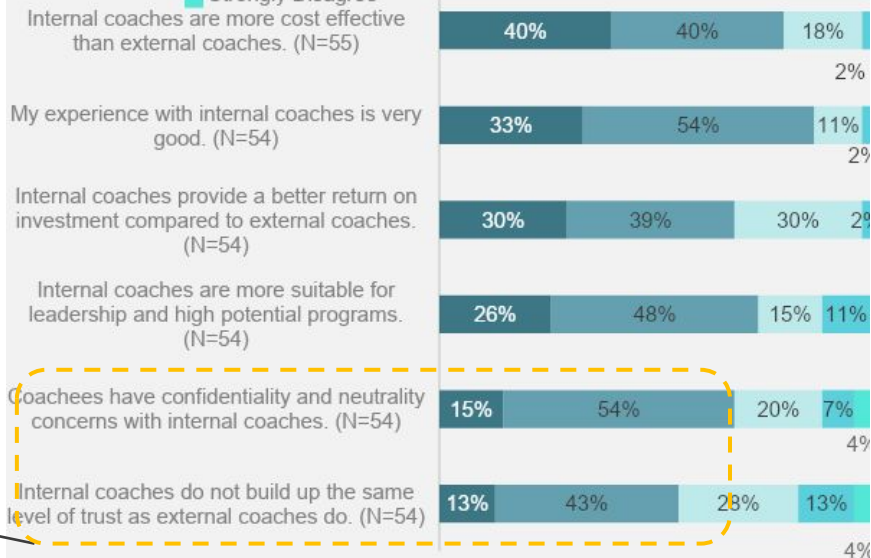
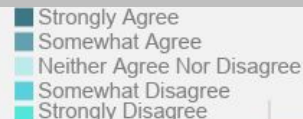
% of Internal Coaches used



CR
(n=80)

Companies find ICs more cost effective and provide better ROI than ECs, but there are issues with confidentiality, neutrality and trust attached to ICs.

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

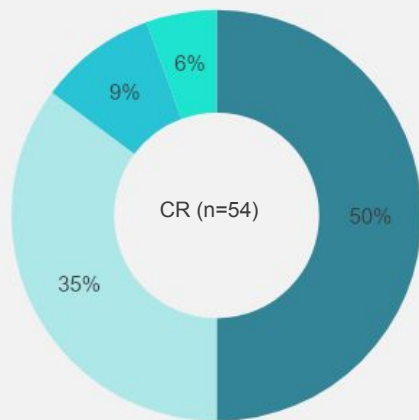


Responsibilities of Internal Coaches

For 85% of companies, coaching is less than 50% of the IC's job responsibilities.

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

%age of internal coaches' job responsibilities dedicated to coaching activities

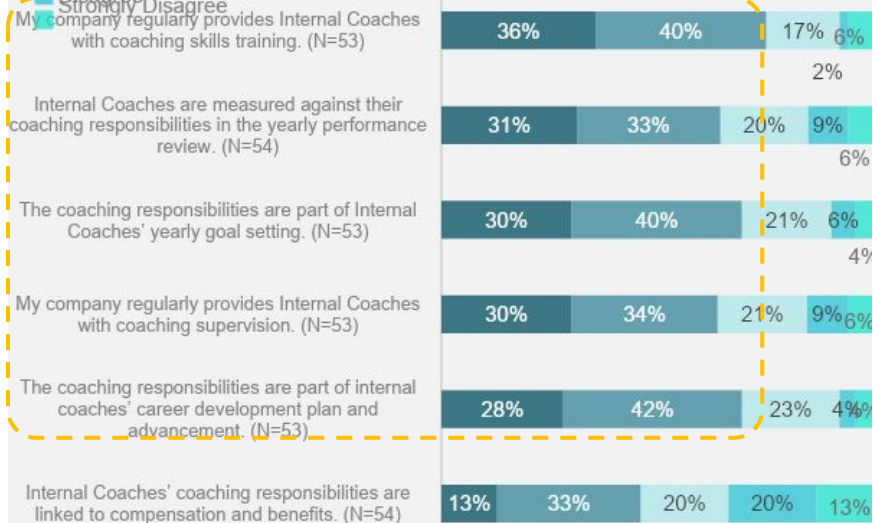


33% of the companies claim that coaching responsibilities are not linked to ICs' compensation and benefits.

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

Legend for agreement levels:

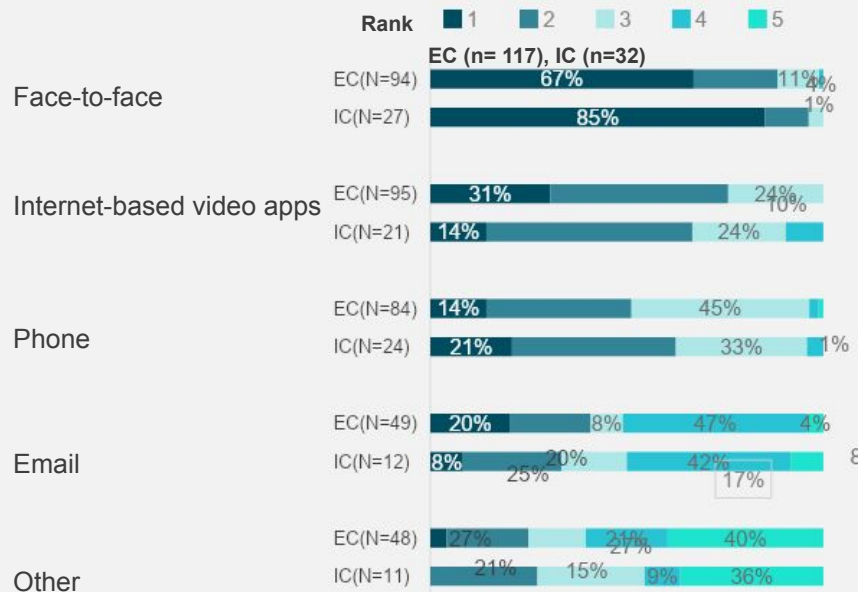
- Strongly Agree
- Agree
- Neither Agree Nor Disagree
- Disagree
- Strongly Disagree



Medium of Coaching Assignment Delivery

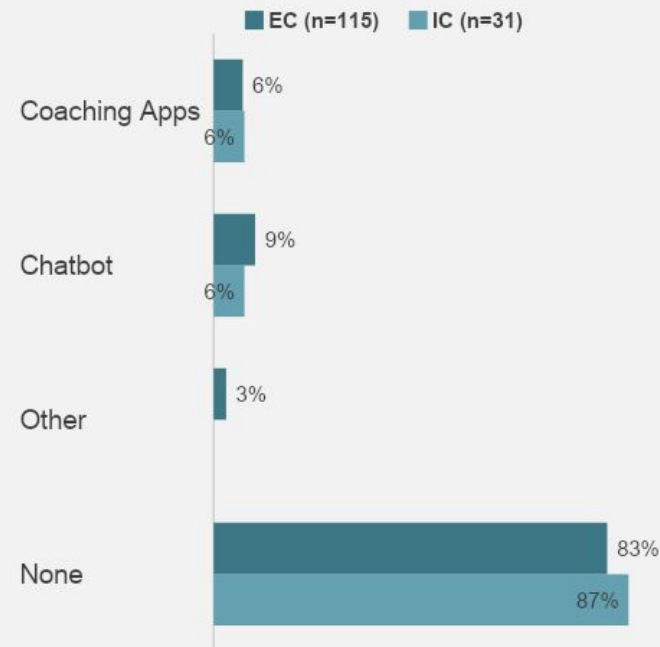
The medium of delivery most used by ECs and ICs is the face-to-face meeting.

Q. Please select and rank the media used to deliver your coaching assignments?



Most ECs (83%) and ICs (87%) do not use technology- or AI-based coaching tools.

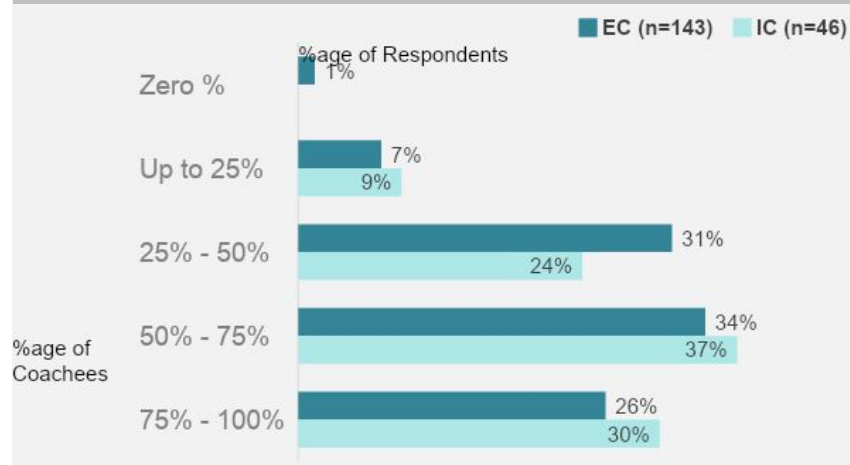
Q. Please indicate if you are using technology- or AI-based coaching tools as part of your coaching assignments.



Profile of Typical Coachee

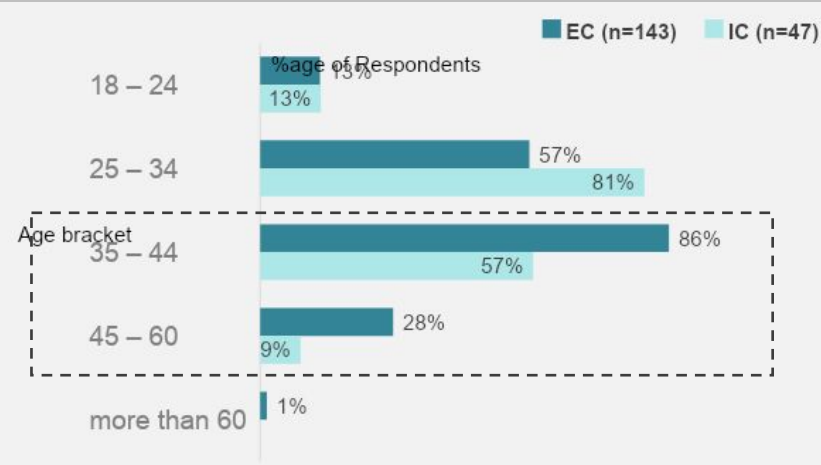
On an average 60% (median) of the coachees are female.

Q. Please indicate the percentage share of your female coachees



ECs have more coachees in the higher age brackets

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

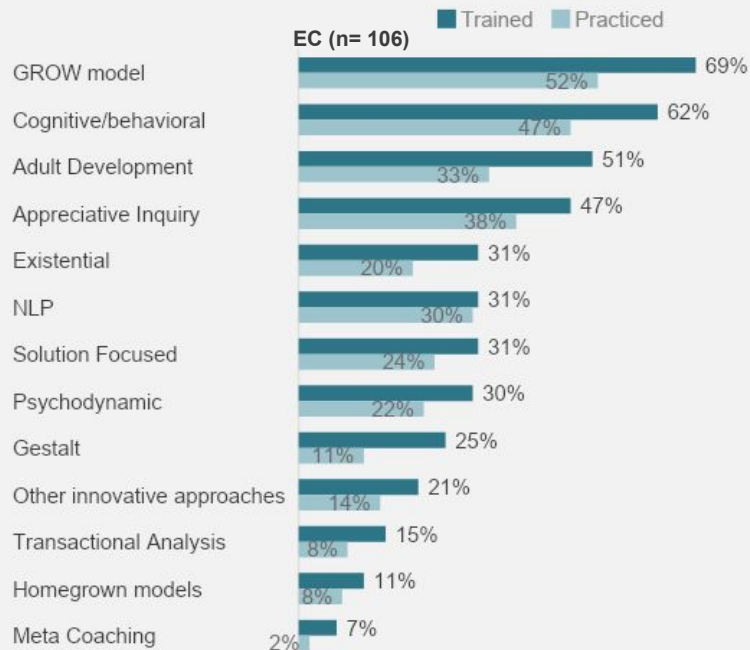


67% of the ICs from Mainland China says more than half of their coachees are female, much higher than the 49% in overall 6 markets, while the numbers of ECs are 60% vs 50%.

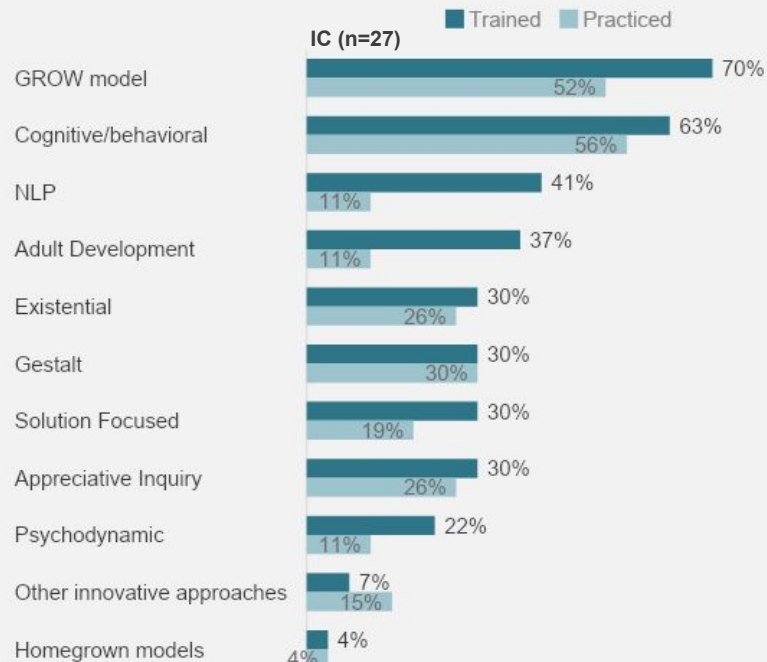
Coaching Models – Trained vs Practiced

Wide variety of coaching models and theories being practiced by ECs and ICs. Training vs practice is more consistent for ECs while for ICs there is a wider gap in what they train and practice.

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)



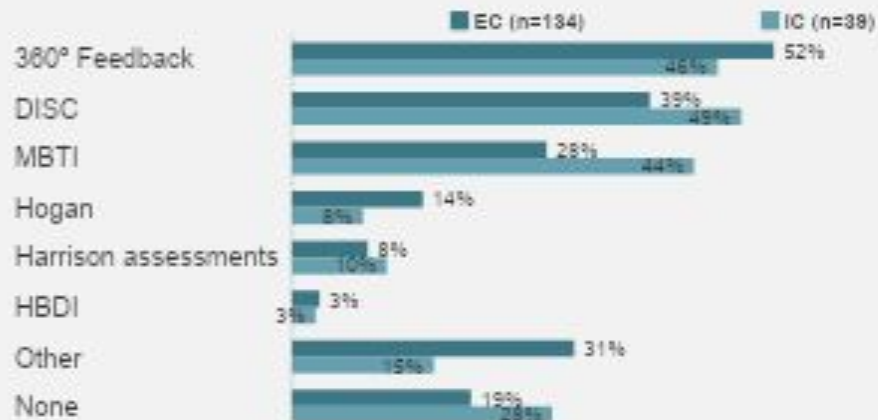
Q. Please share the models of coaching you have studied, formally trained or self-trained in and whether you use them in your coaching practice.? (Multiple choice)



Diagnostic Tools Used in Coaching

360* Feedback, DISC and MBTI are the most widely used tools

Q. Which diagnostic tools do you use in your coaching practice? (Multiple Choice)



Some of the tools mentioned in “Others” are Lumina, Meta Program, EQ, Enneagram, OPQ, Gallup Strength Finder, The Leadership Circle 360 Profile, Clifton Strengths etc.

Coaching beliefs and philosophy

Understanding of Coaching

Prevailing understanding of definition of coaching has elements of facilitation and guidance.

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

Strongly Agree Somewhat Agree Neither Agree nor Disagree Somewhat Disagree Strongly Disagree

Facilitation

Unlocking a person's potential to maximize his/her own performance, based on the principle of asking, rather than telling. (N=123)



The process of assisting and guiding coachees to resolve personal, social, or psychological problems and difficulties. (N=121)

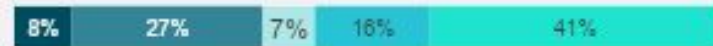


Guidance

Sharing experiences and passing down knowledge to coachees to support them in their professional development. (N=120)



Providing guidance focused on strategic goals. (N=122)



Providing Solutions

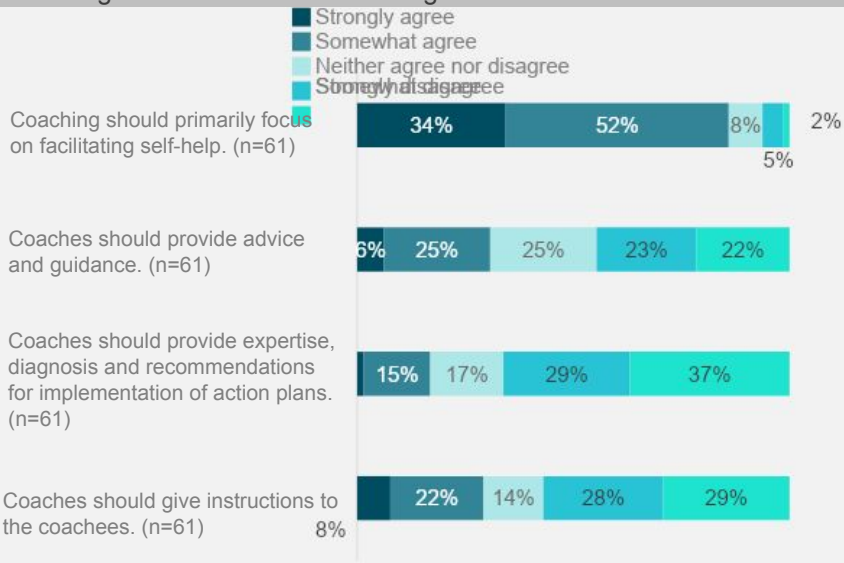
Providing expert knowledge such as providing information, solving coachee's problems, making diagnosis and recommendations for implementation, etc. (N=120)



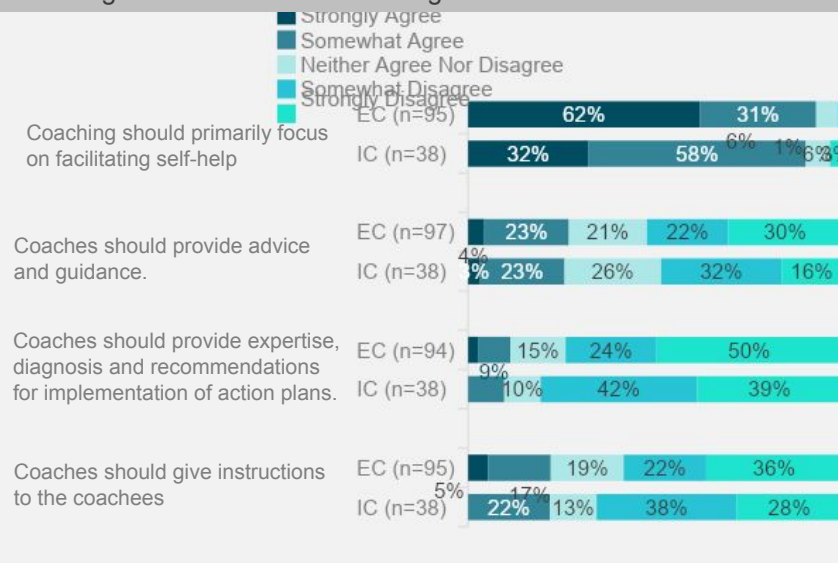
Understanding of Coaching

Both companies and coaches acknowledge that there are elements other than facilitating self-help in coaching, such as guidance, sharing expertise, recommendations, etc. This comes out stronger from companies.

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.



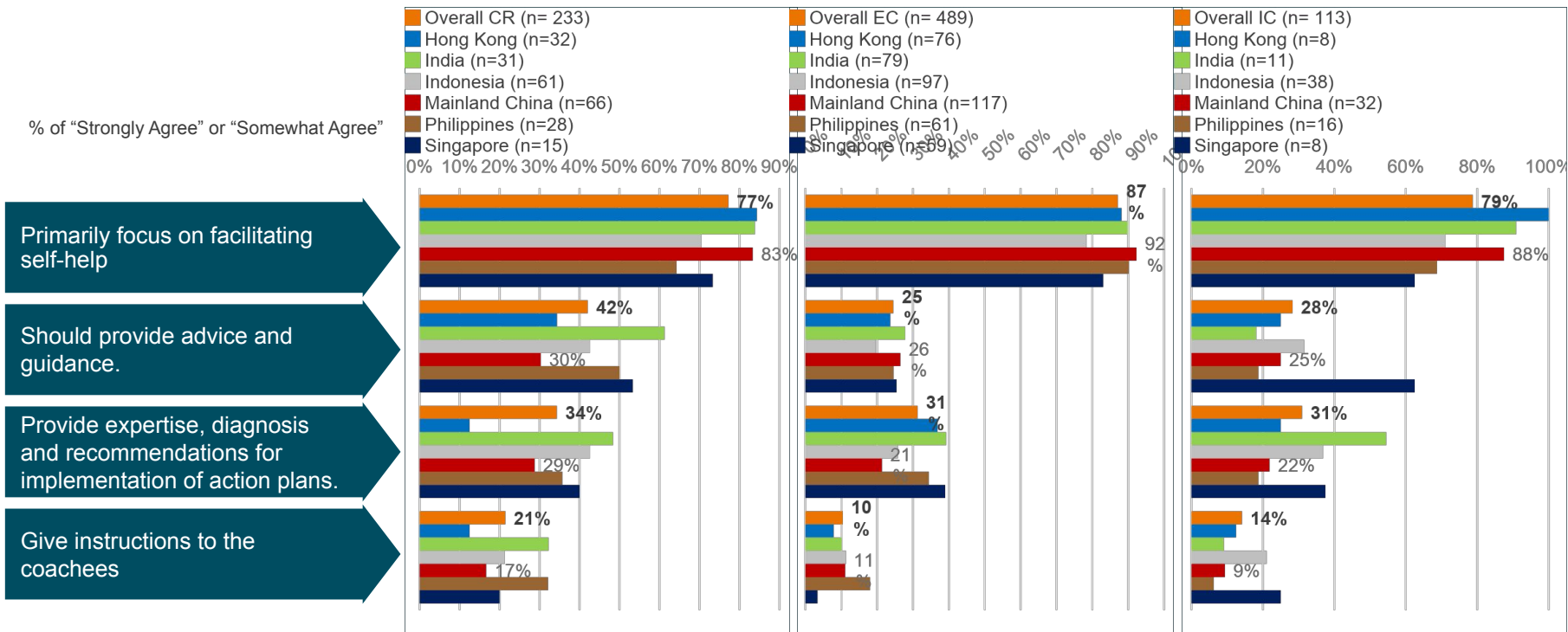
Something to ponder

What role does the cultural dimension of power play in the coaching relationship? How can we honor the unique identity and cultural values and make it more relevant to Mainland China?

Understanding of Coaching – By Market

Across markets the understanding of coaching is a blend of facilitating self-help, guidance and providing solutions.

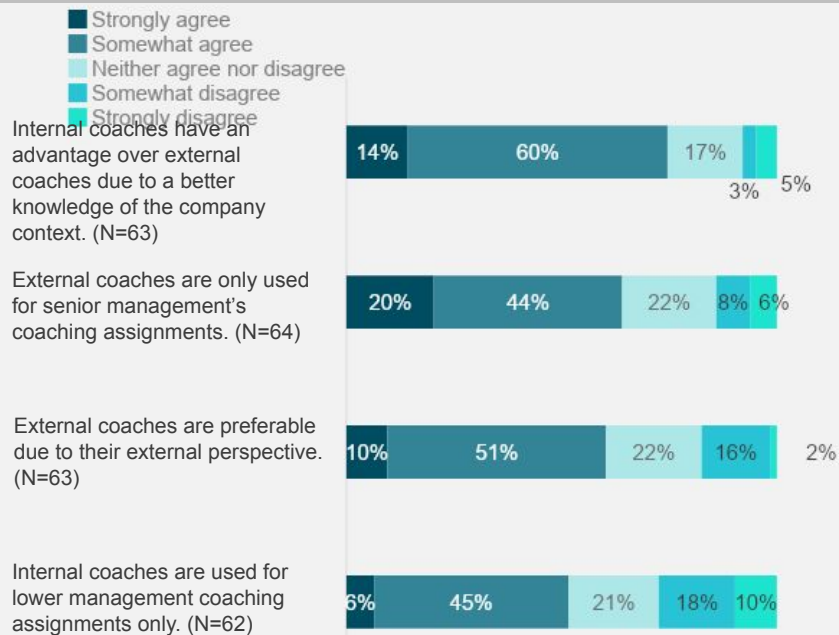
Q. Please indicate the extent to which you agree or disagree with the following statements about coaching..



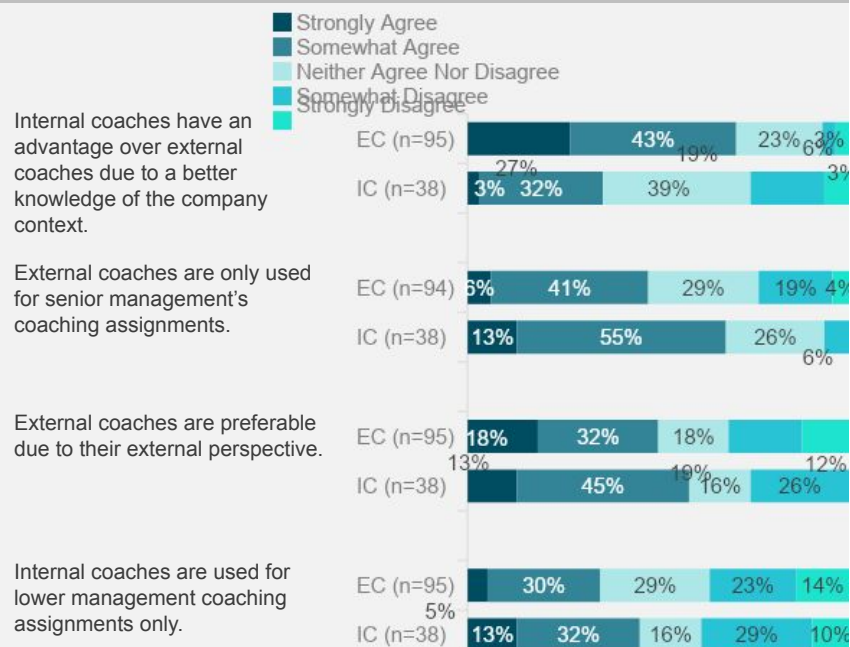
Beliefs About Internal and External Coaches

Marked differences in perceptions & preferences of coaching service provider from CRs and ECs and ICs.

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



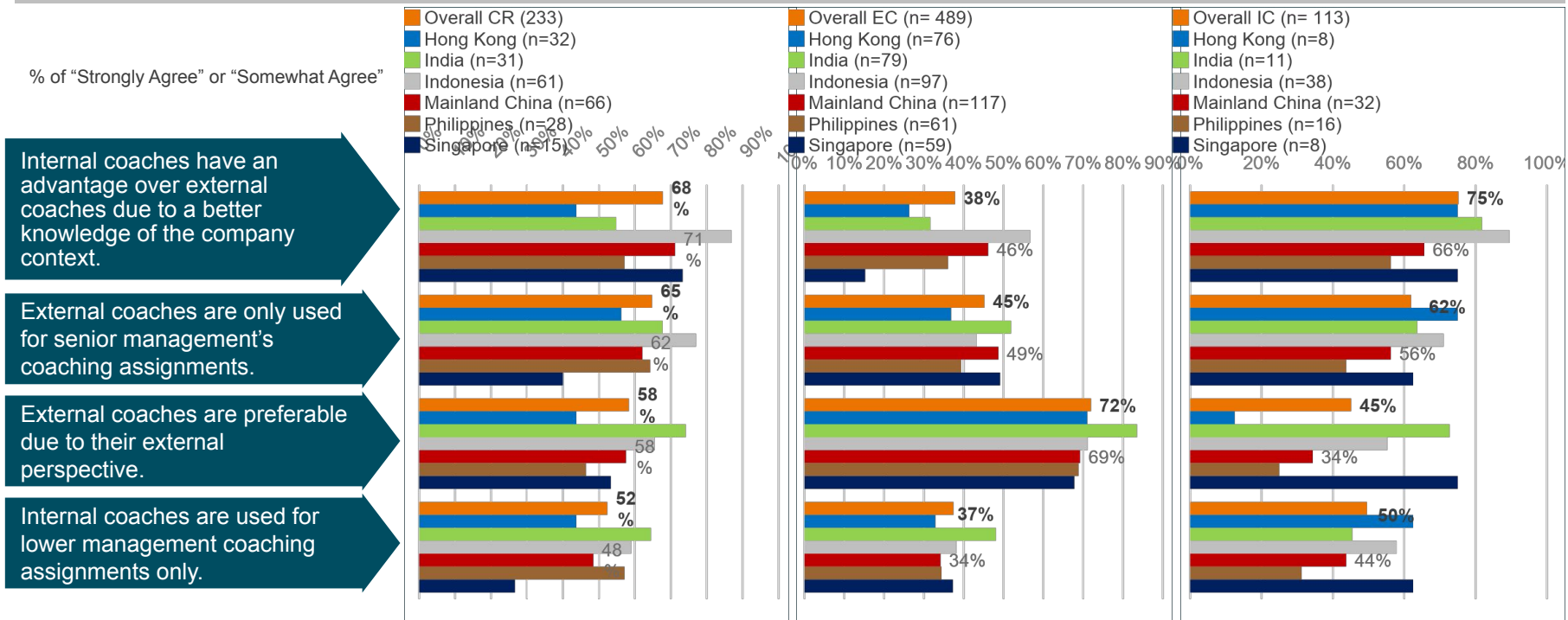
Q. Please indicate the extent to which you agree or disagree with the following statements about coaching.



Beliefs about Internal vs External Coaches By Market

There seemed to be consistency that fewer ECs agree that ICs have an advantage due to better company knowledge and that they are solely used for lower management coaching.

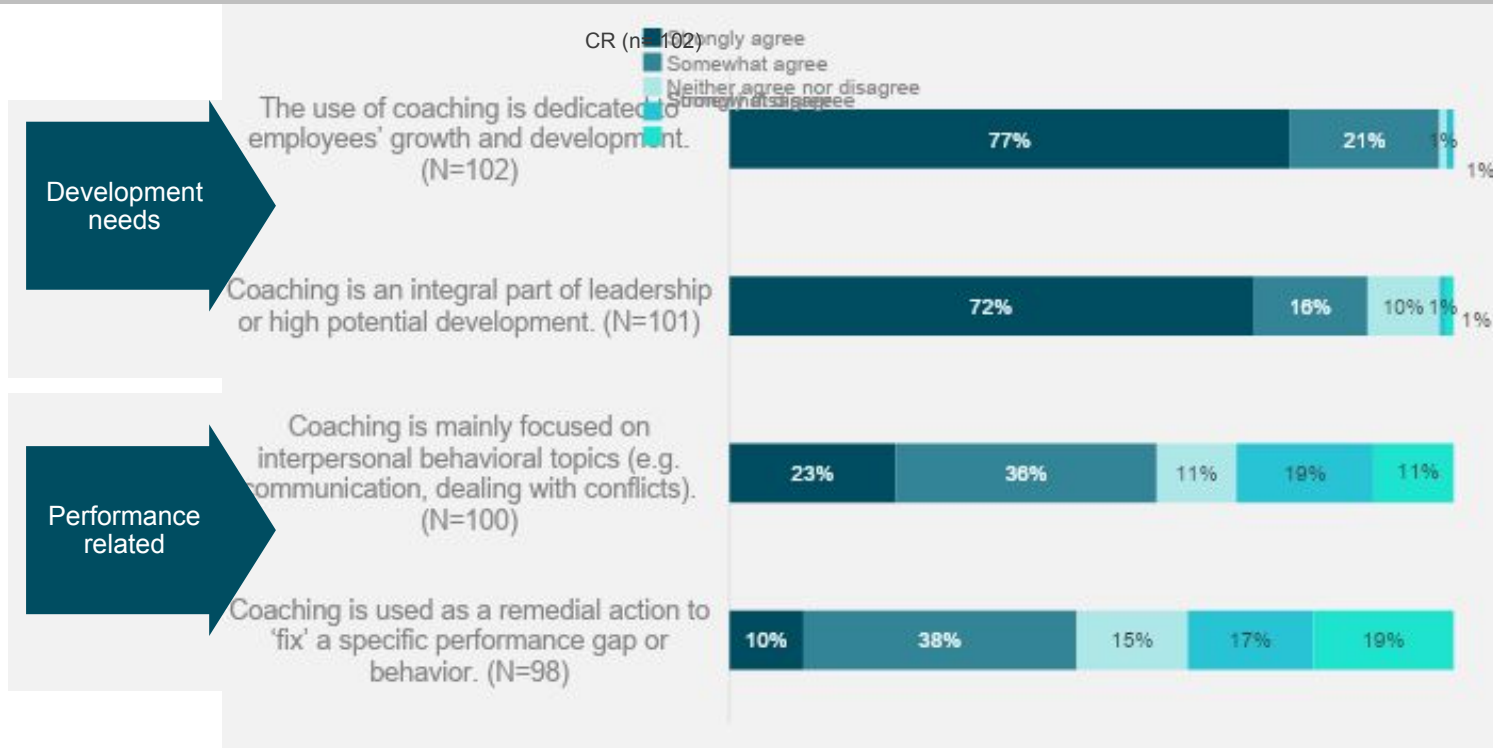
Q. Please indicate the extent to which you agree or disagree with the following statements about coaching..



Expected Organizational Goals for coaching

Coaching market need is primarily employee growth and development and high potential development.

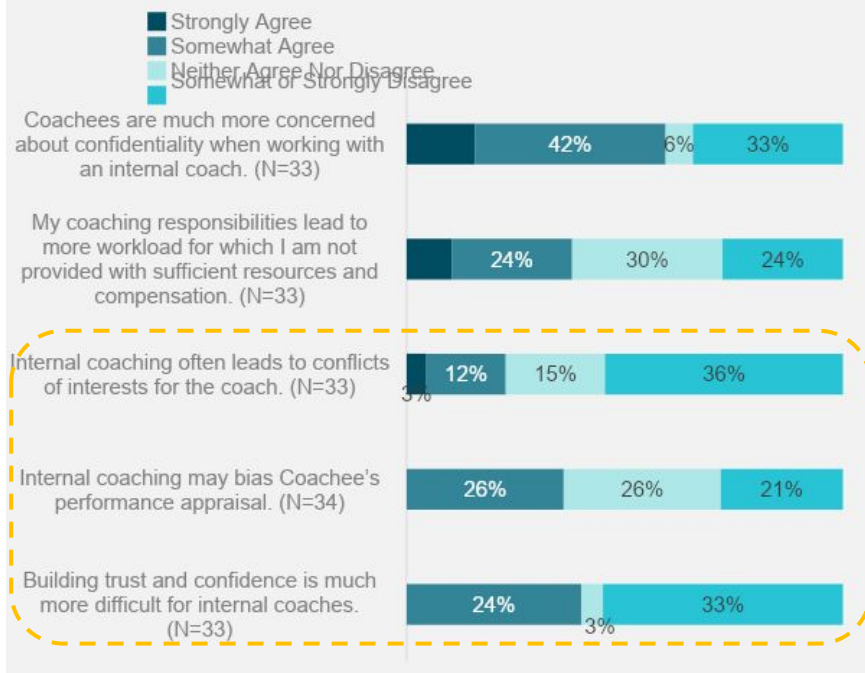
Q. Please indicate your level of agreement with the following statements on how coaching is used in your company?



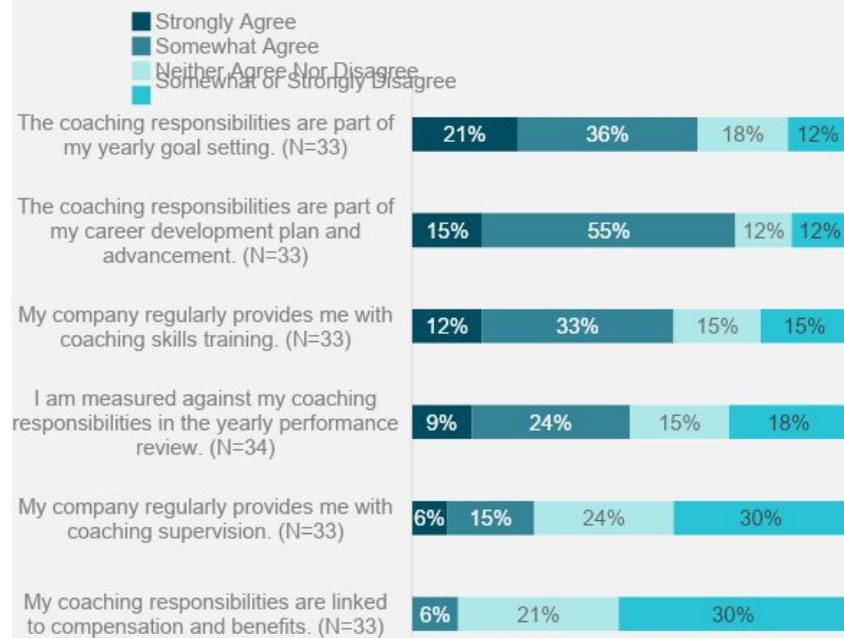
Opinion of Internal Coaches - Dynamics

57% ICs tend to agree that confidentiality may seen as a concern for coachees but 33% disagree that trust and bias are an issue

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



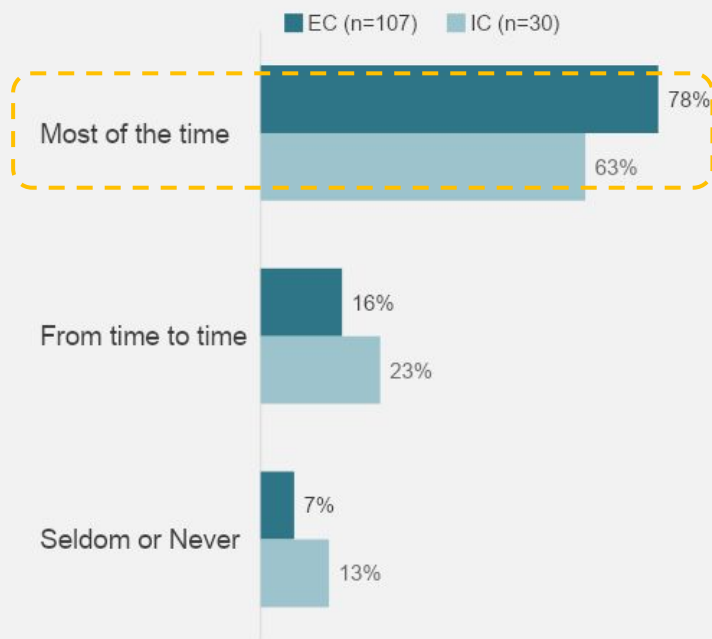
Q. Please indicate the extent to which you agree with the following statements?



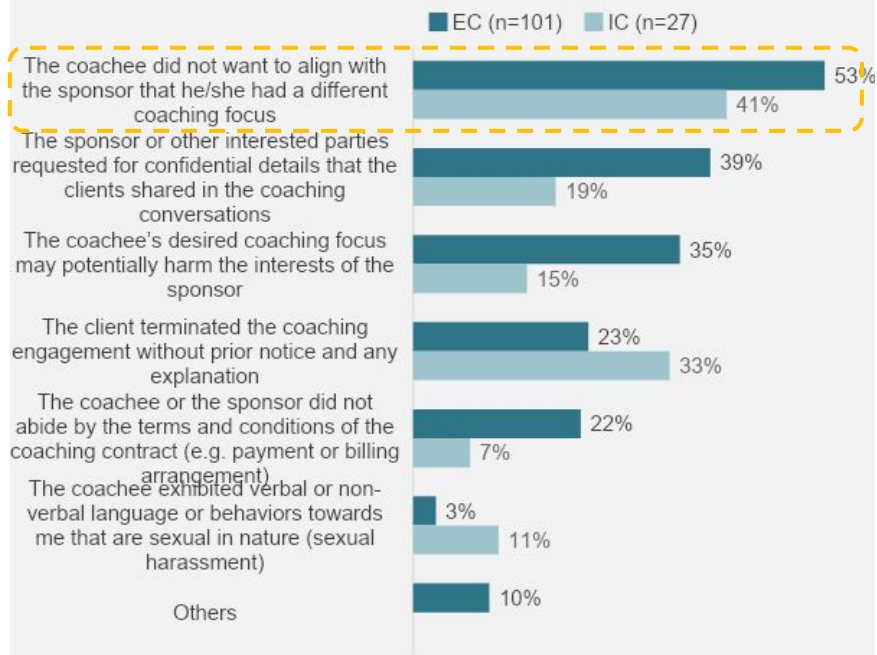
Ethical Dilemmas Faced While Coaching

Highest reported ethical dilemma is around difference in coaching focus between coachee and sponsor.

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



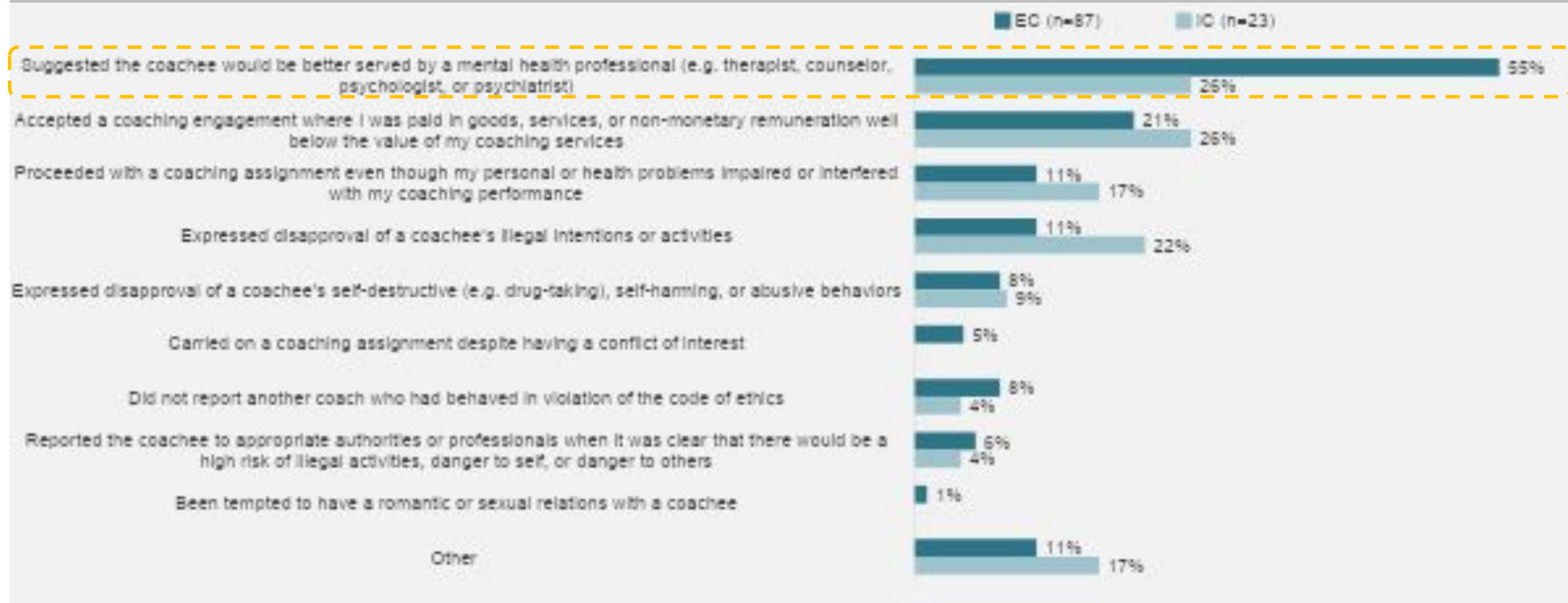
Q. What ethical dilemmas have you faced in your coaching practice?



Difficult Situations Experienced While Coaching

One in two ECs and one in four ICs have suggested that coachee be better served by mental health professional.

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

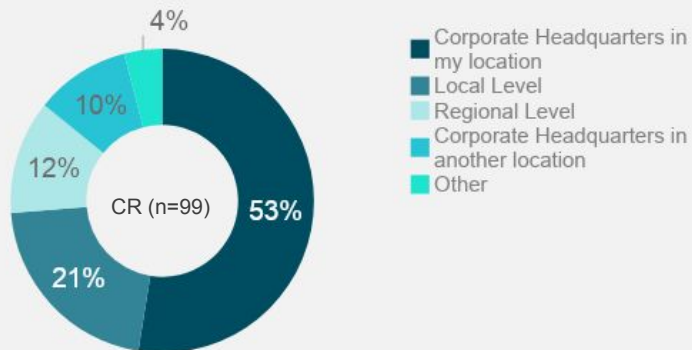


Coaches' selections and credentials

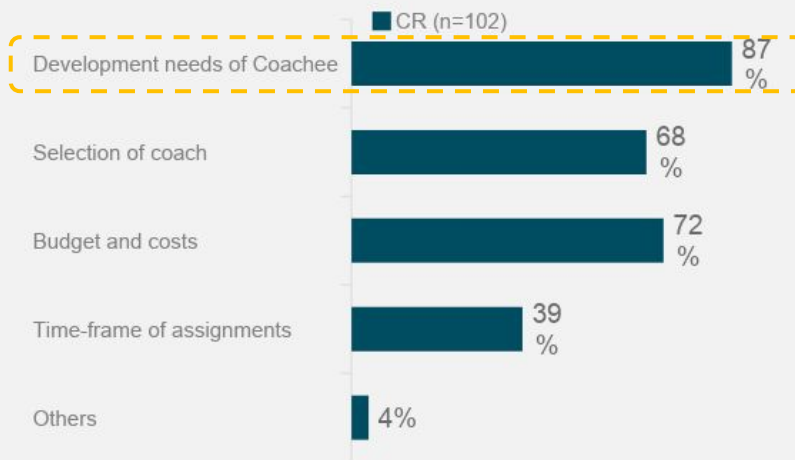
Setting up Coaching Interventions

One of every two decisions to initiate coaching interventions is at the Corporate HQ level.

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



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

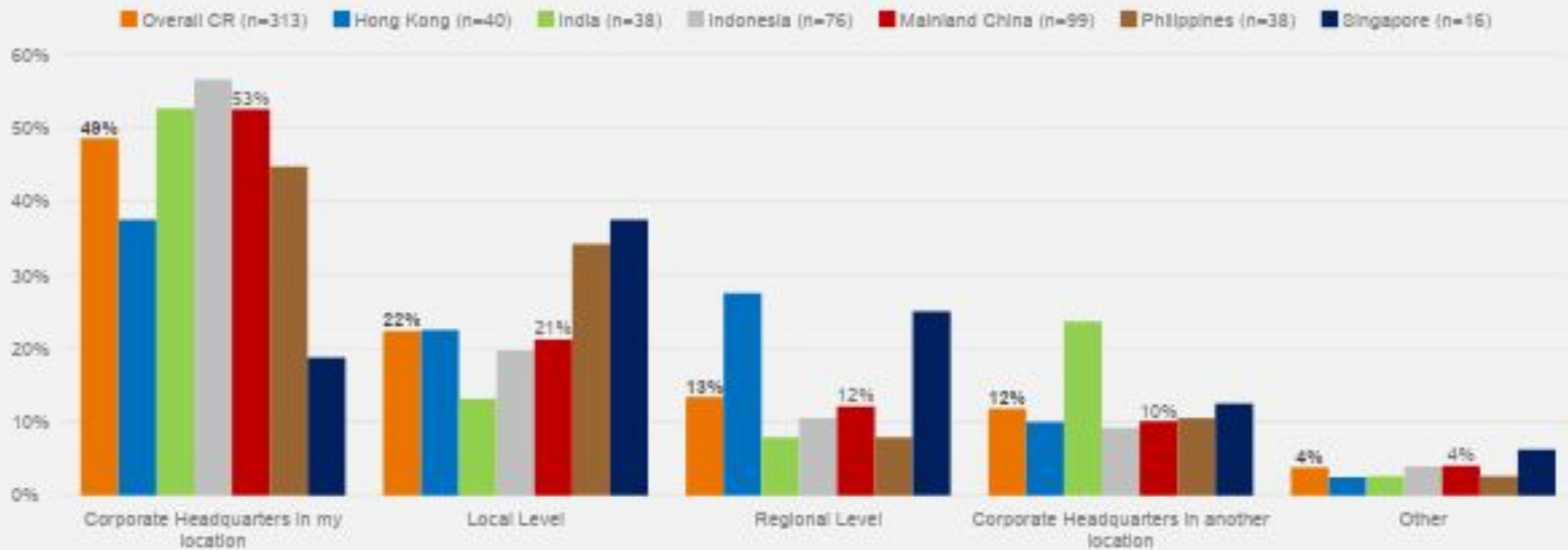


Development needs of coachees, budget and costs, and selection of coach are the top 3 most important factors when considering setting up coaching intervention for companies in Mainland China.

Setting up Coaching Assignments – By Market

Since coaching is mostly initiated at the HQ level, how does it impact the effectiveness of coaching at the local level?

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

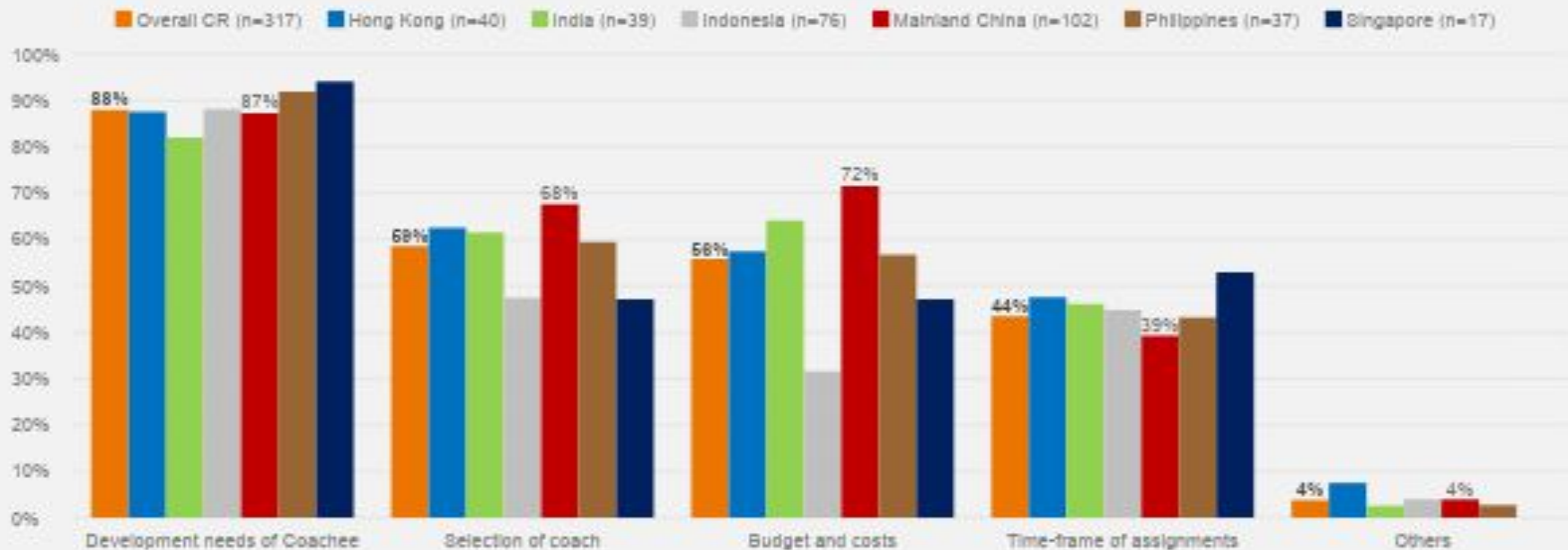


In the 2017 Survey, similar observation where Corporate headquarters were mainly responsible for setting up the coaching process

Setting Up Coaching Assignments – By Market

Comparing to other markets, Mainland China considered budget and costs for setting up coaching assignment is more important.

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

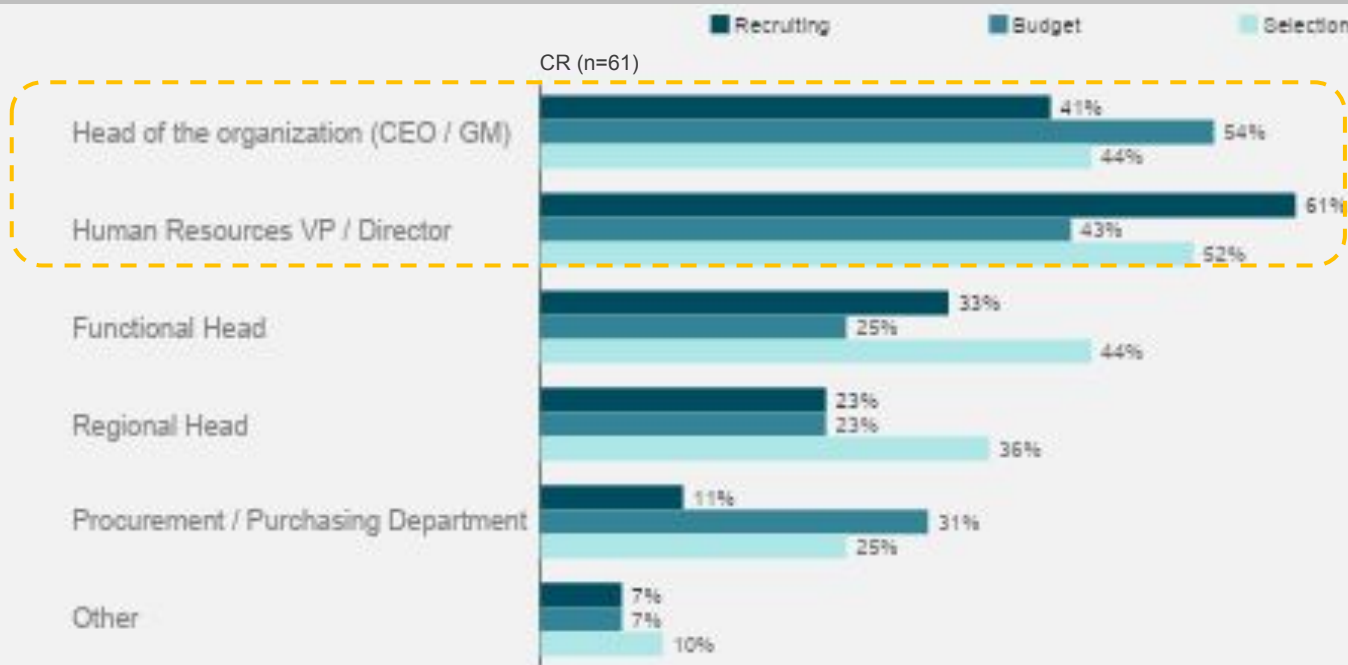


In the 2017 Survey, "Time-frame of assignments" and "Selection of Coach" were the two most important factors respectively.

Decision Makers For Coach Recruitment

Majority of CEO/GMs are involved in budgeting decisions (54%) while HR heads are involved in recruitment (61%) and selection decisions (52%). CEO/GM and Functional Head also play an important role in coach selection (44%).

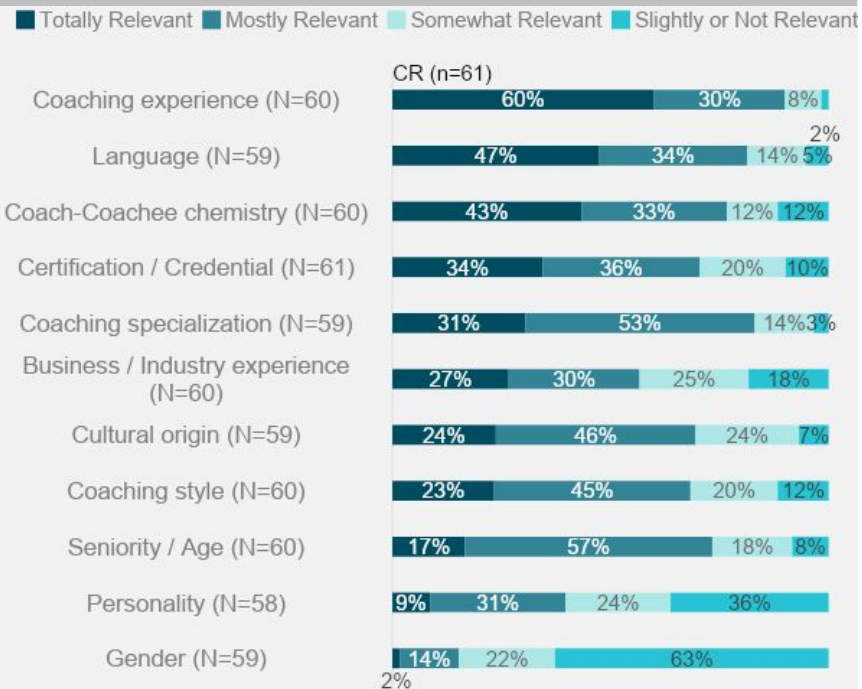
Q. Who is involved in the external coaches' recruitment process?



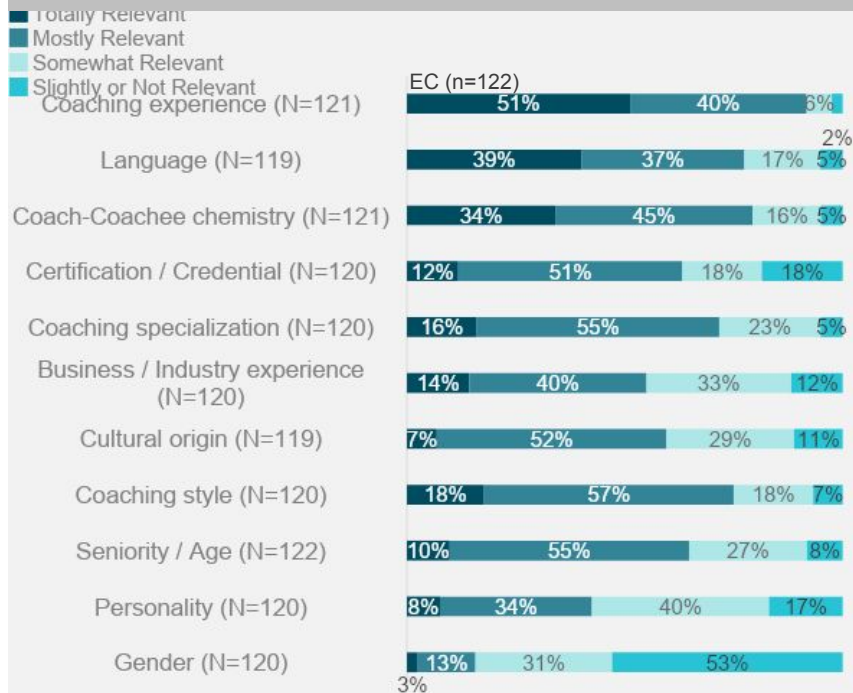
Criteria for Hiring & Selecting External Coaches

Organizations and EC are aligned on the criteria for selection of EC. Other than Gender, all criteria are important. Comparing to other markets, Mainland China considered language is more relevant to coach selection than coach-coachee chemistry and credential.

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



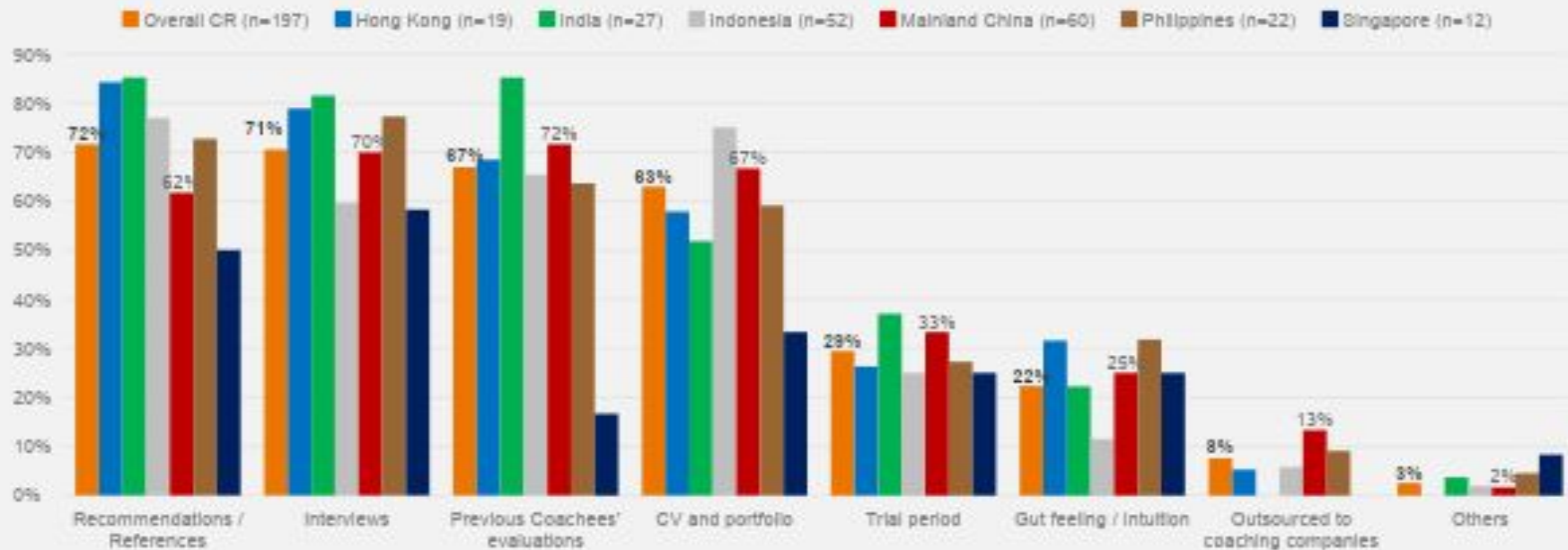
Q. How relevant are these criteria to companies when selecting external coaches? (External Coaches)



Assessment of External Coaches

Top 2 external coach assessments for all markets: Recommendations/References and Interviews.

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

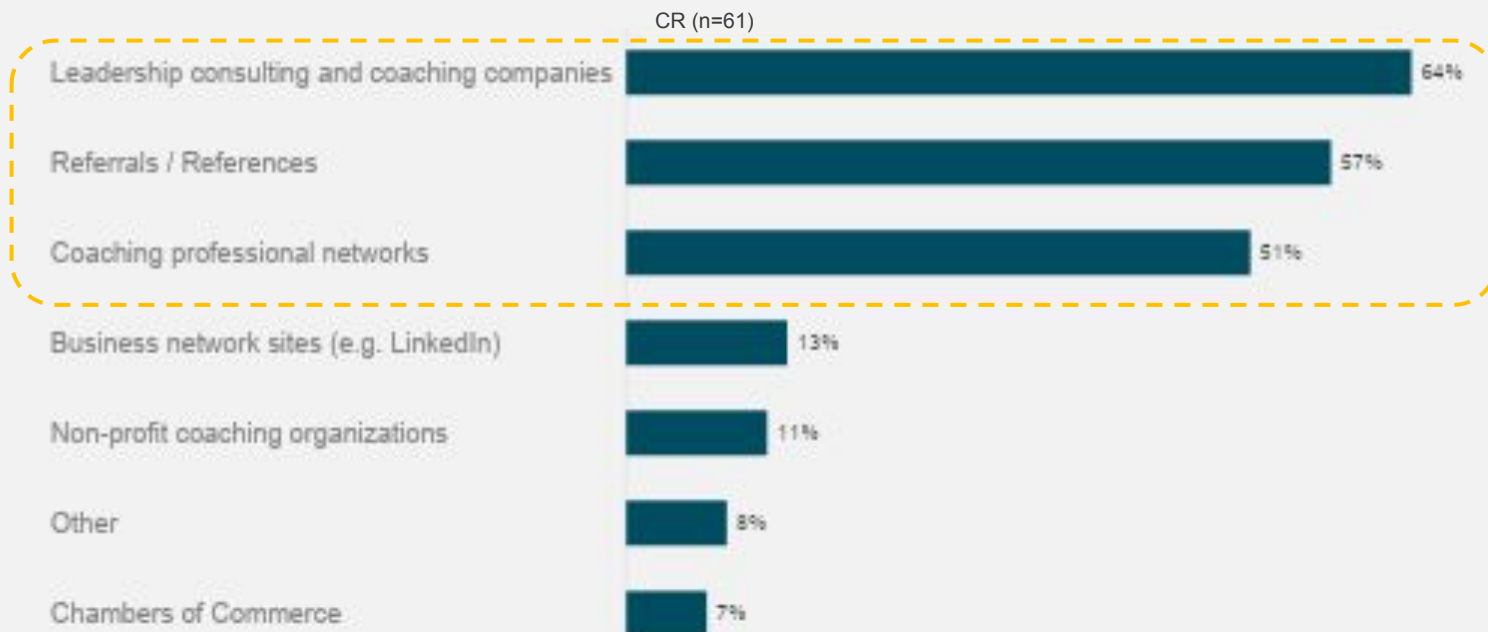


In the 2017 Survey, Organizations brought out interviews, coaches' CV and portfolio and the feedback from coachees as main tools for assessing EC.

Channels for Hiring External Coaches

Top 3 leading channels for recruitment of coaches are Leadership Consulting and Coaching Companies, Referrals and References, and Coaching Professional Networks. Companies in Mainland China rely more on coaching companies to hire external coaches while other markets use Referrals/References more.

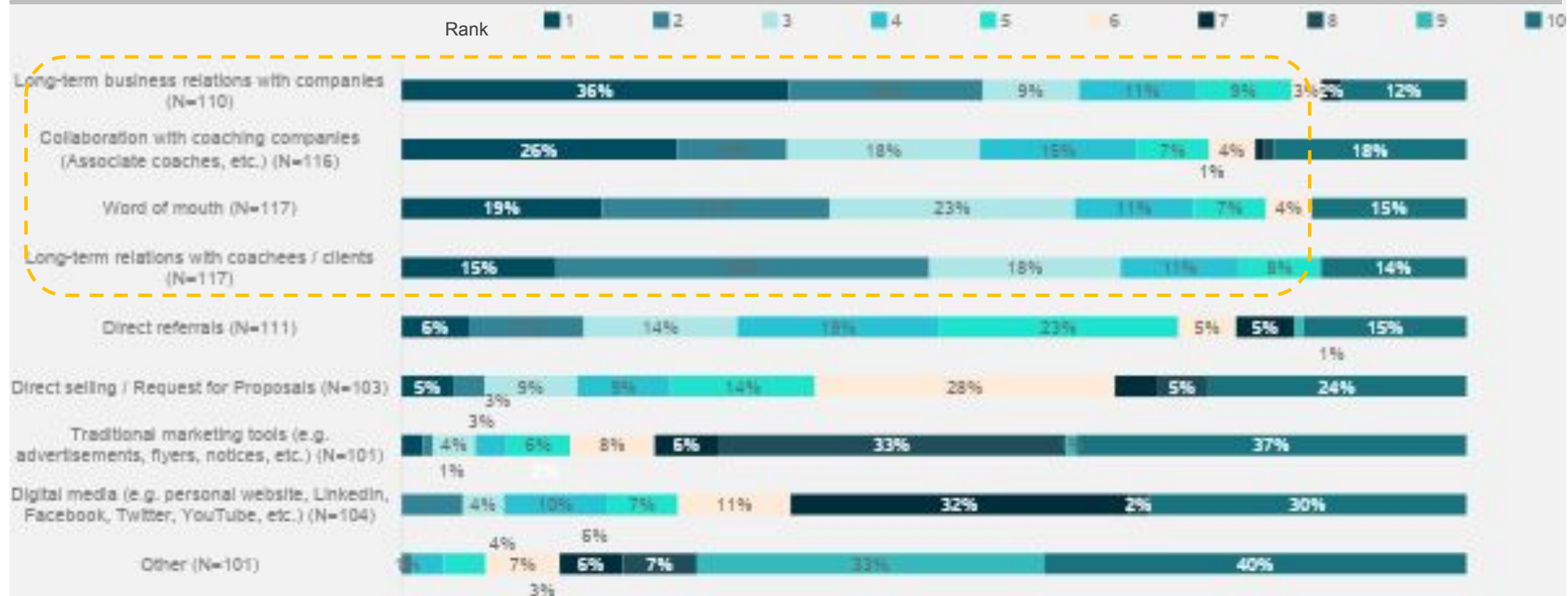
Q. Which channels do you use to recruit external coaches? (Multiple Choice)



Channels for Hiring External Coaches

ECs used different approaches to win coaching assignments including Long-term Business Relations, Collaboration with Coaching Companies and Word of Mouth.

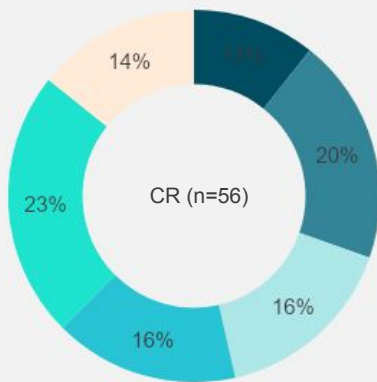
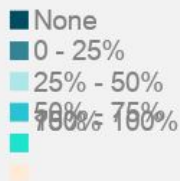
Q. Please select and rank the channels by which you won your coaching assignments in 2017-2018.? (External Coaches)



Local Pool and Cultural Origin of Coaches

Opportunities for local pool of coaches to expand into the territory currently occupied by overseas coaches.

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



Q. Please rank the cultural origins of your external coaches



Cultural Origins of ECs

Organizations in Mainland China prefer coaches from the same cultural origin, followed by HK China, Europe and US/Canada.

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

Origin of Coaches

Row Labels	Hong Kong	India	Indonesia	Mainland China	Philippines	Singapore	Other Asian Markets	Africa	Americas — Central or South America	USA / Canada	Australia / New Zealand	Europe	Middle East
Hong Kong China (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%

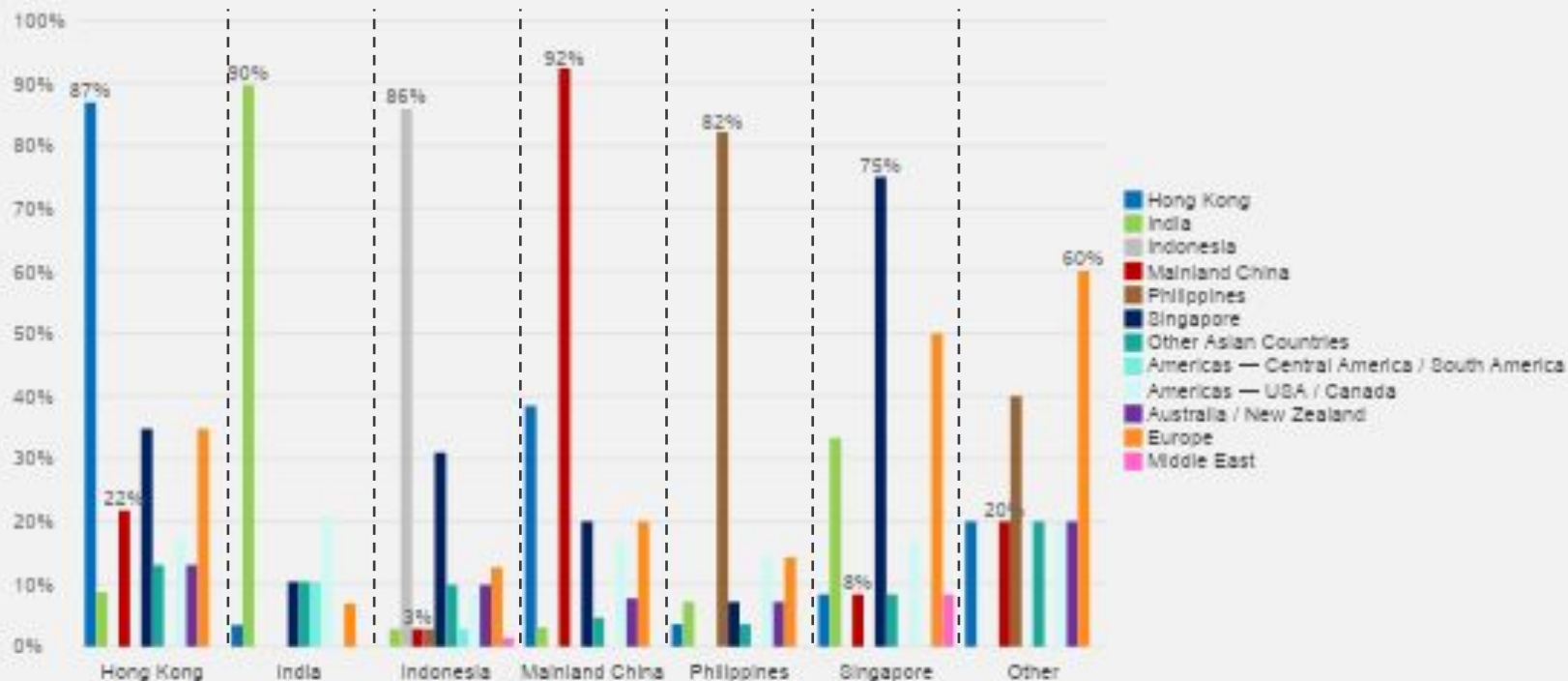
2nd Highest selection

3rd Highest selection

Cultural Origins of ECs

Local pool of Coaches is the most popular in all Markets.

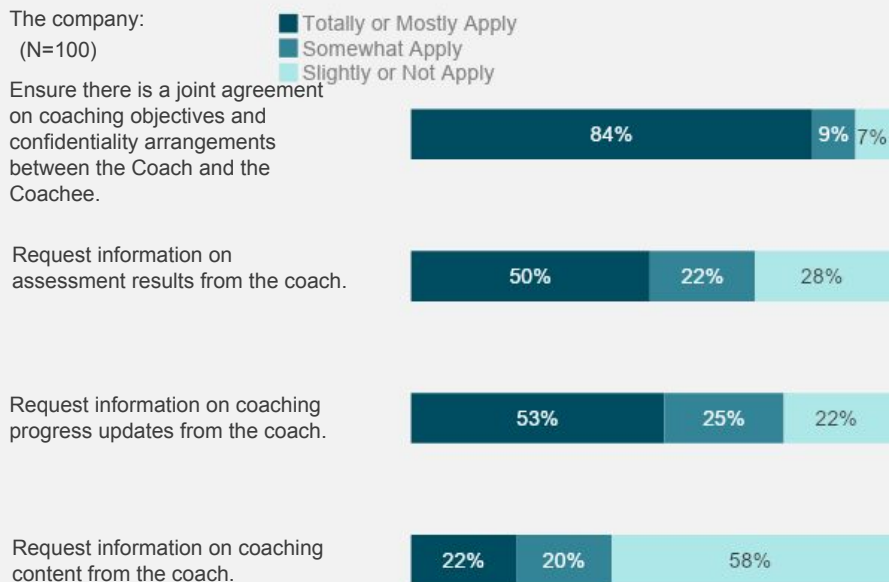
Q. Please select the top three cultural origins of your external coaches.



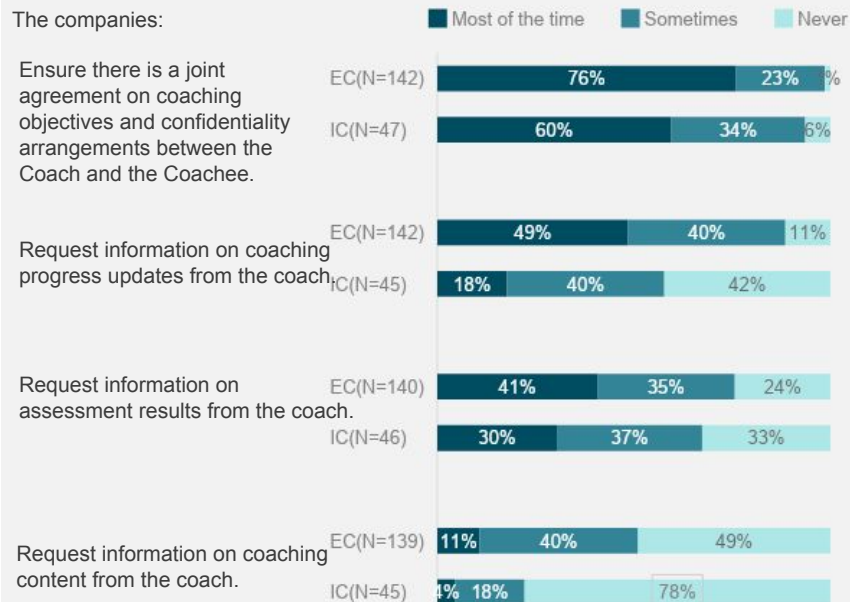
Coaching Process Setup

Although majority of Companies and Coaches apply the coaching objective and confidentiality agreement process, information on coaching content is still requested by companies in many cases.

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



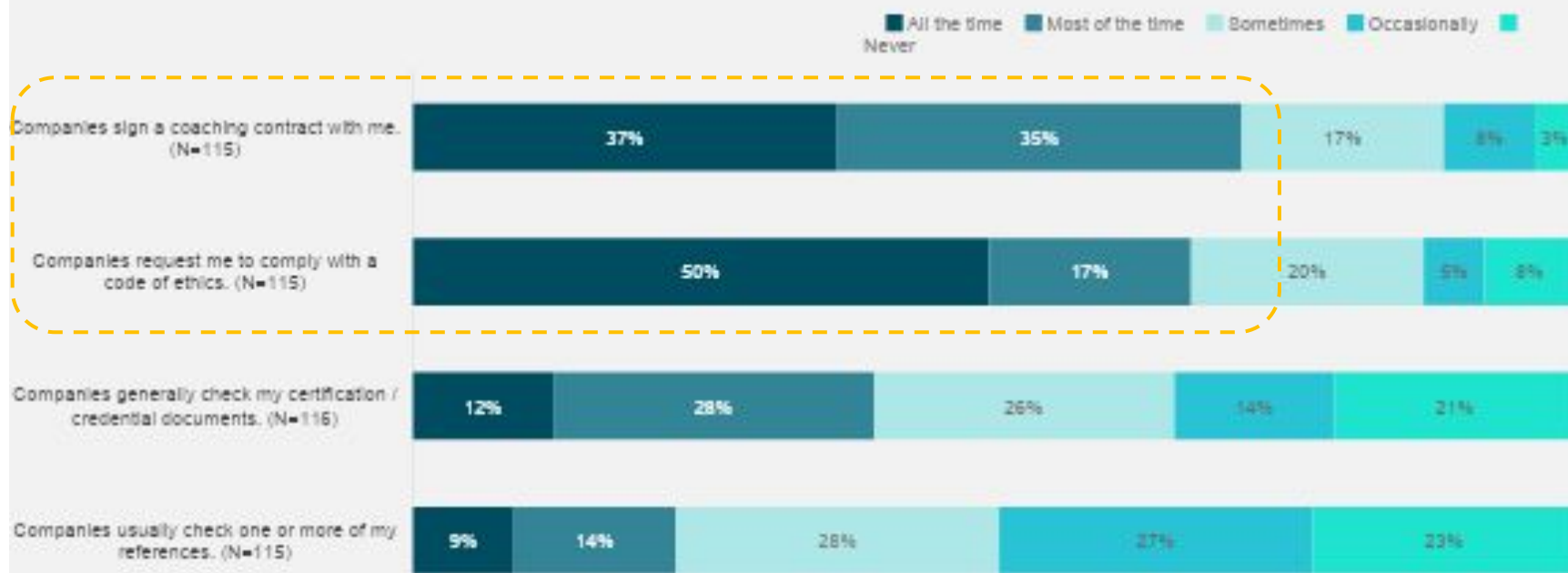
Q. To what extent do the following statements apply to the companies you work with?



Process Compliance by Organizations

High compliance on the code of ethics and signing of coaching contracts.

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



Coaching Process Practices

Credentials seems to be more important for new companies than self-paying individuals.

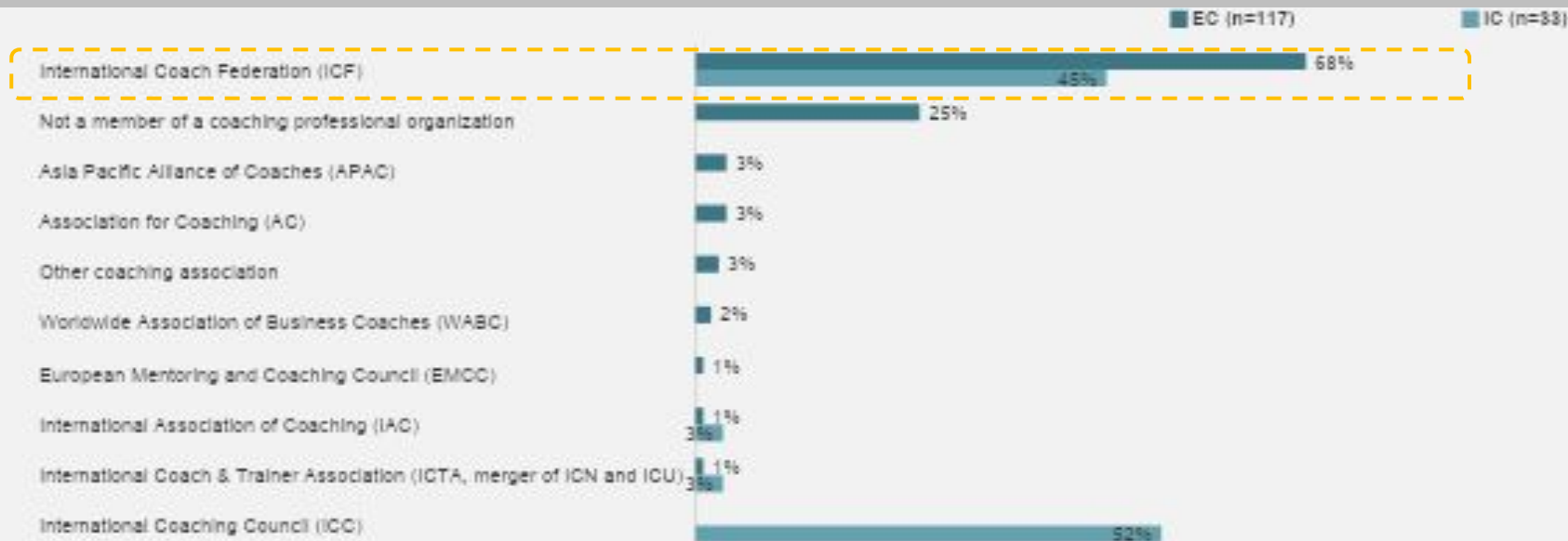
Q. Please indicate the extent to which the following statements hold true? (External Coaches)



Membership of Coaching Association

ICF continues to be the leading professional coaching association in Mainland China.

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

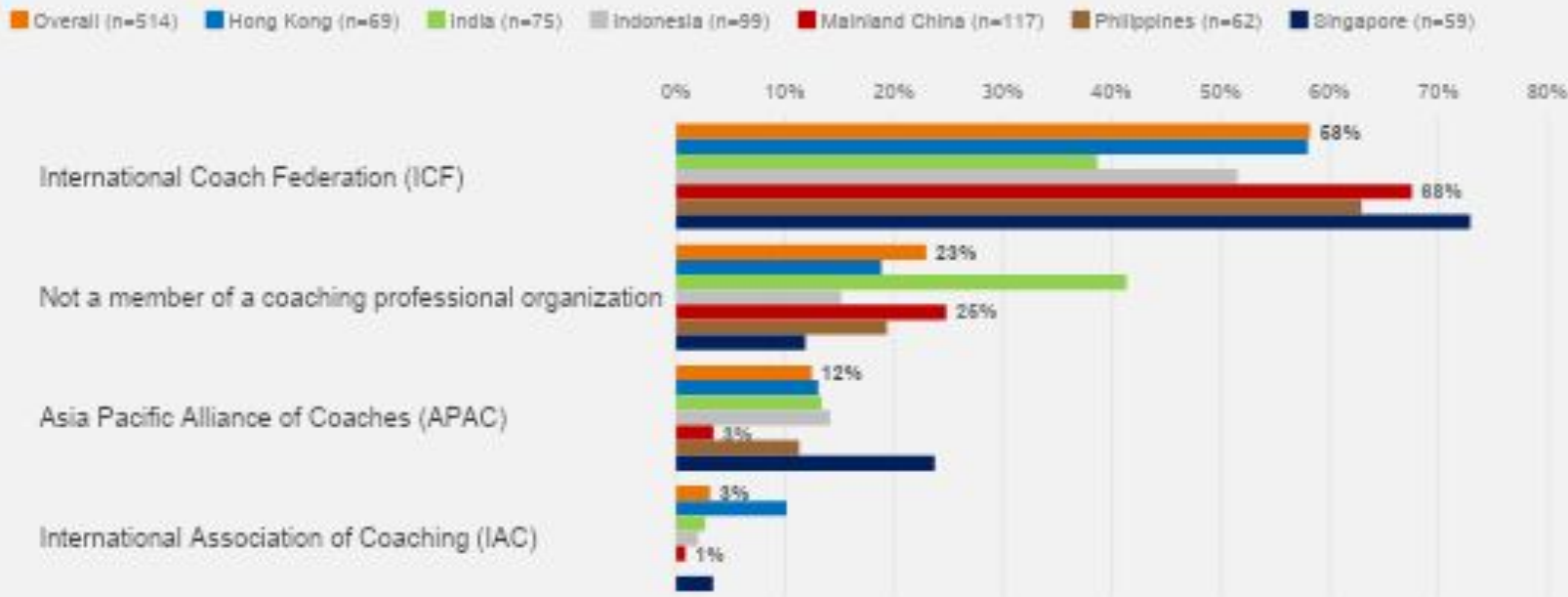


Every one in four ECs claimed that they are not member of any coaching professional organization. How can coaching associations attract their membership?

Membership of Coaching Associations – By Market

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

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

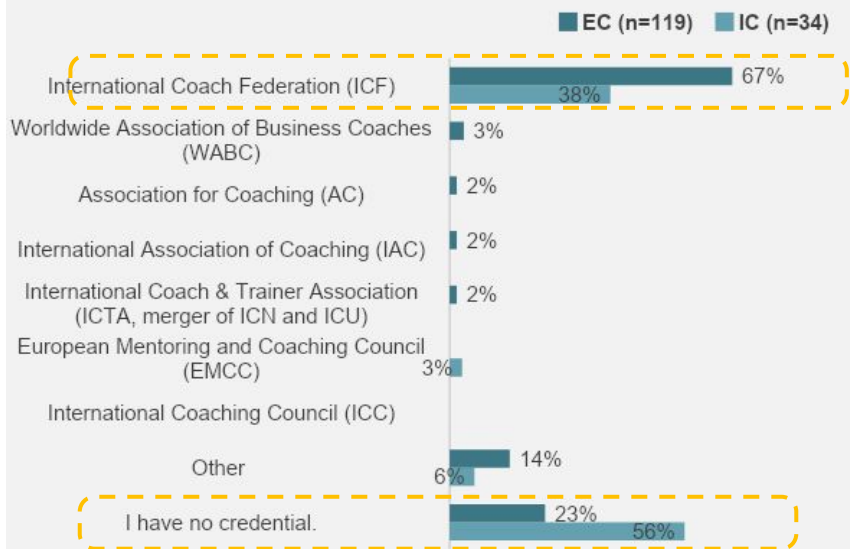


In the 2017 Survey, ICF was the leading professional coaching association with 53%, followed by APAC with 16%. 32% were not part of any coaching professional organizations.

Credentialing body

ICF is the most popular credentialing body.

Q. Who is your credentialing body? (Multiple Choice)



It is interesting to note that 56% of ICs have no credentials at all.

Credential Level of EC& IC by Market

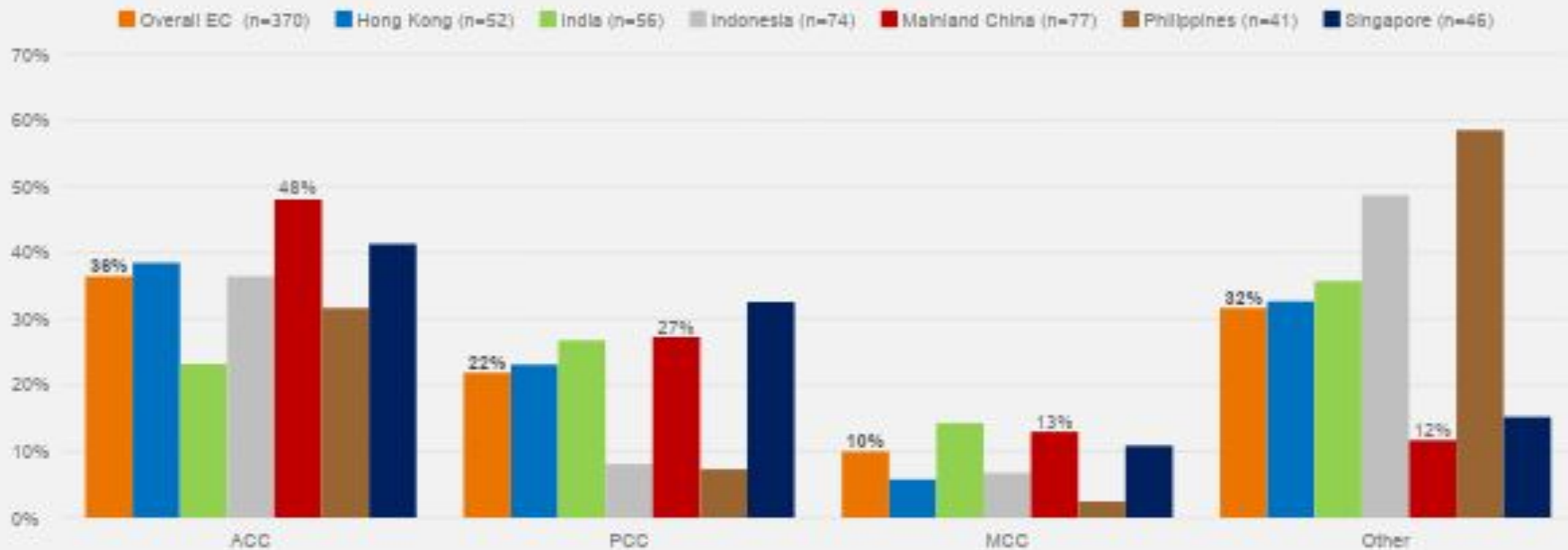
Q. What is your credential level?

EC (number)	ACC	PCC	MCC	Other	Total
Hong Kong China	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 China	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

EC Credential Levels

In Mainland China, 48% of ECs are accredited at ACC level, much higher than the number in the 2017 Survey.

Q. What is your credential level?

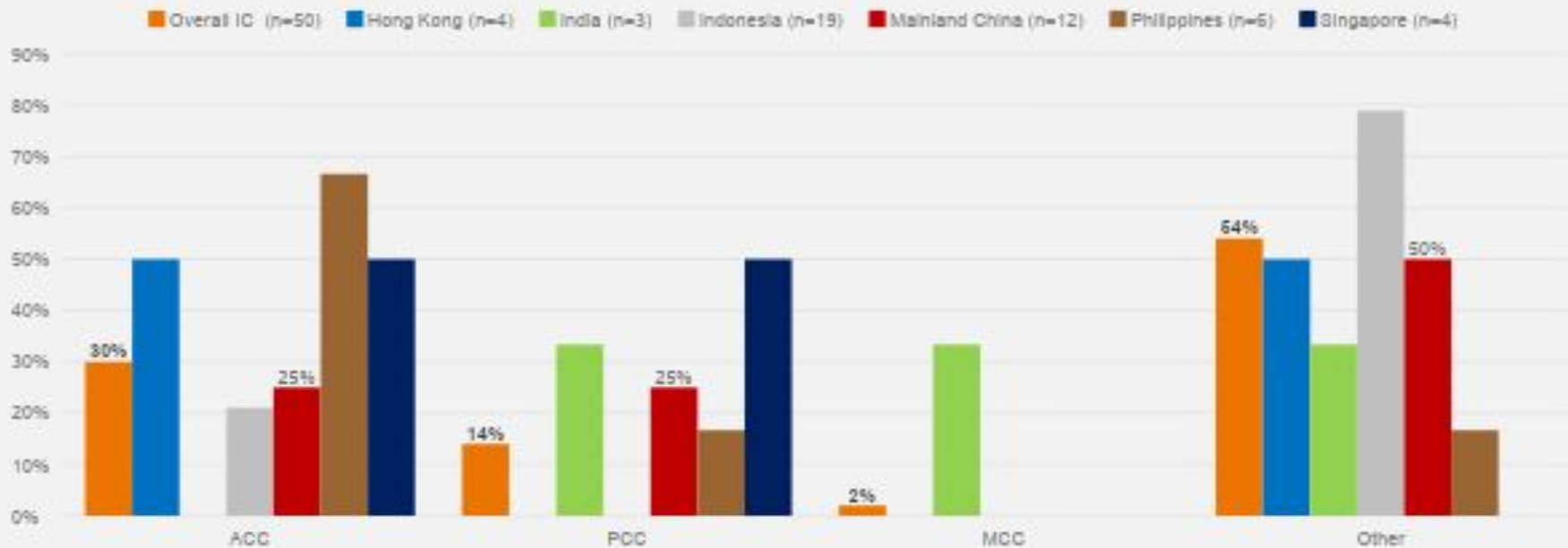


In the 2017 Survey, about 50% of coaches in India and China are accredited at PCC level while the majority of accredited coaches in HK have ACC credentials.

IC Credential Levels

Half of ICs surveyed in Mainland China are accredited at ACC or PCC level.

Q. What is your credential level?

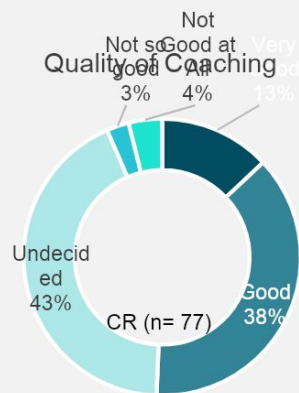


Coaching Evaluation and Diagnosis

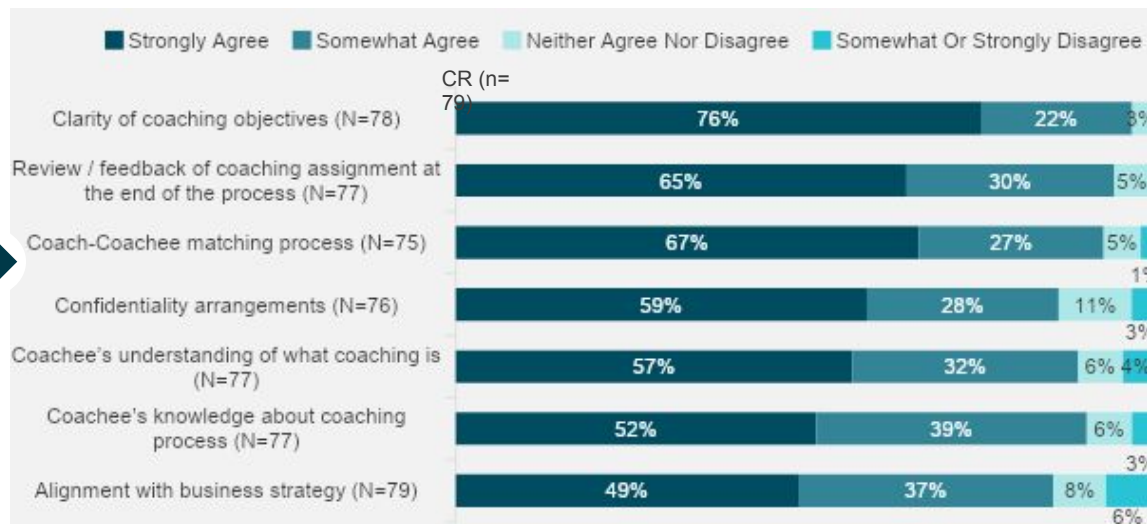
Evaluation of Coaching Quality

Majority of Companies agreed to focus on all factors listed below for further improvement for effectiveness.

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?



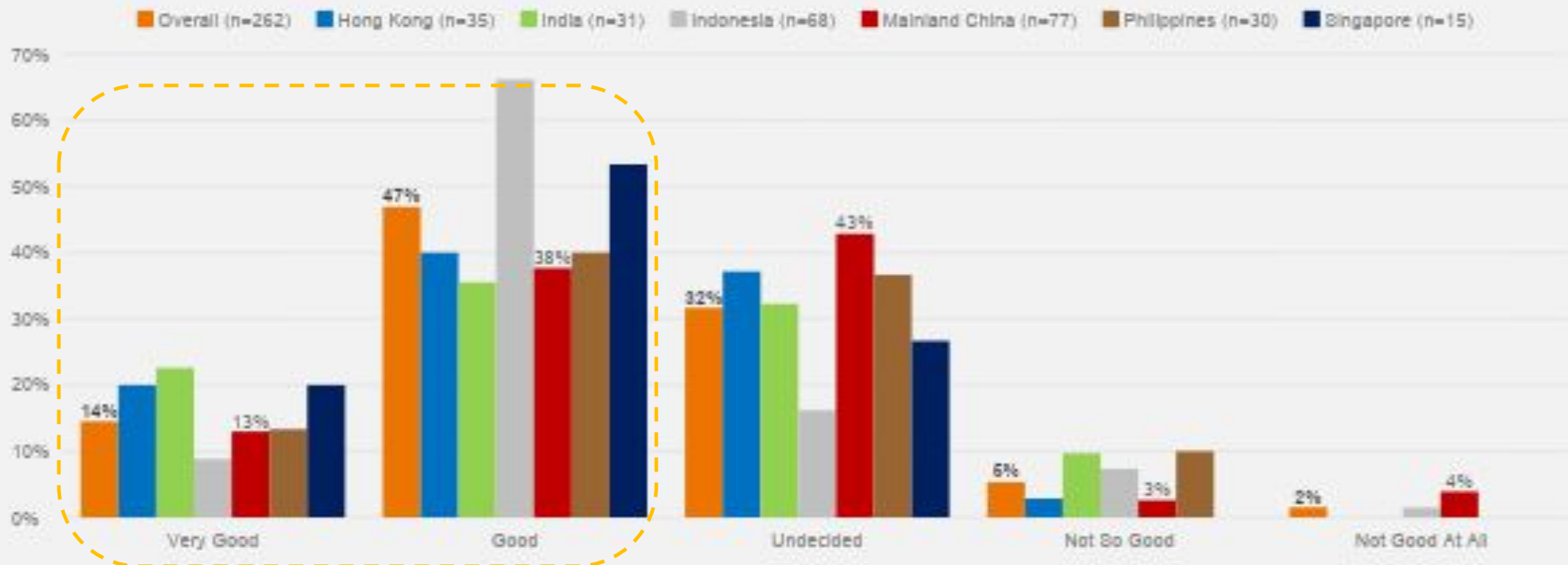
Something to ponder

It's interesting to see a relatively high percentage of "Undecided" regarding coaching quality. What could be the reasons for this?

Evaluation of Coaching Quality

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%.

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'.

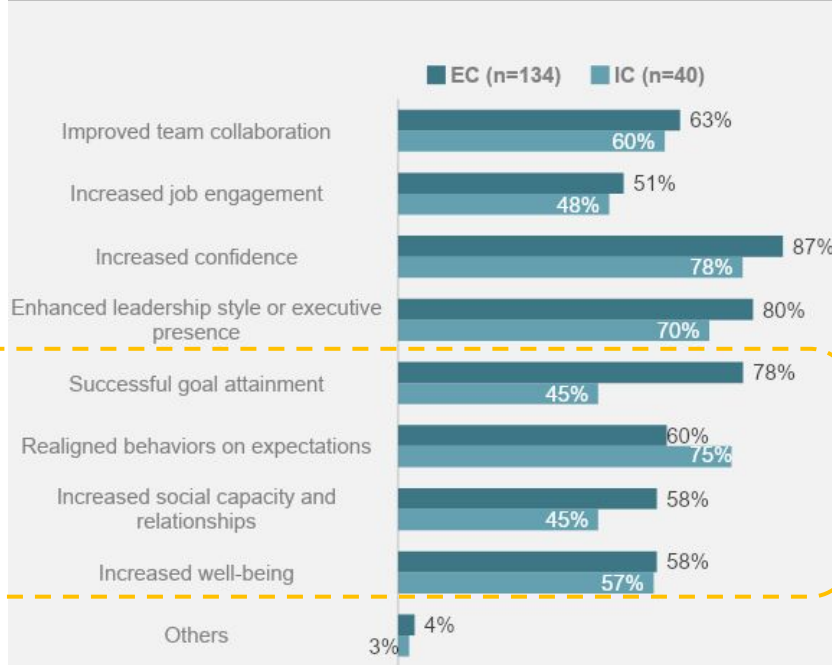
Coaching Benefits – Expectations vs Delivery

Companies and Coaches have significant divergence in their understanding of benefit expectations and delivery from the coaching services.

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



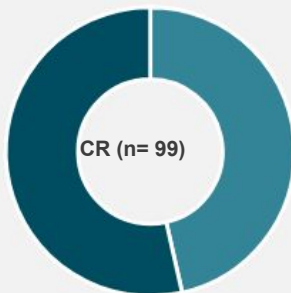
Q. What are the main benefits your clients report they experience after participating in a coaching assignment?



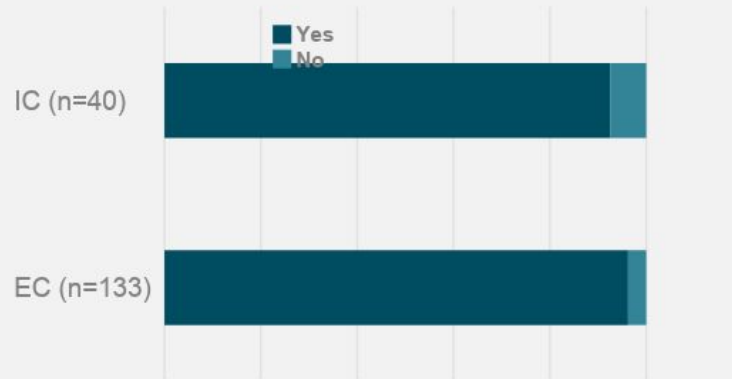
Usage of Evaluation Tools To Measure Success of Coaching

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

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



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



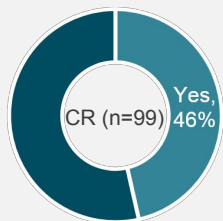
Something to ponder

How can coaches support or partner with Companies to evaluate the success of coaching?

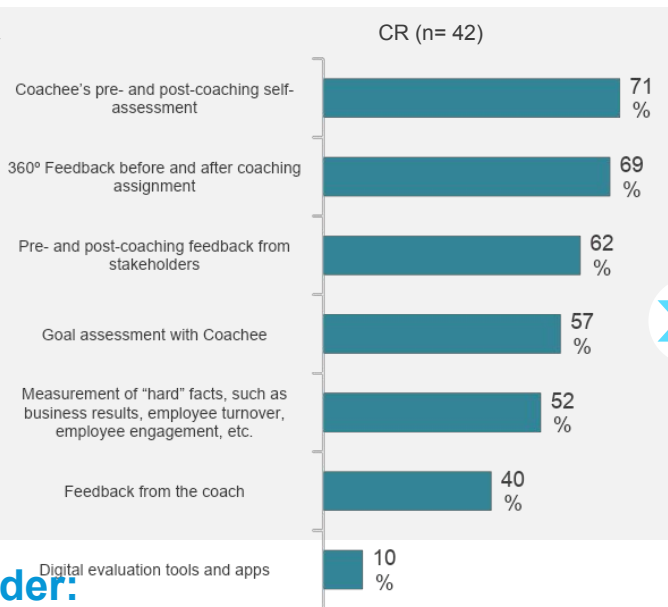
Measurement of Coaching Success

Companies who use evaluation tools value soft data much more than hard facts in the measurement of coaching success.

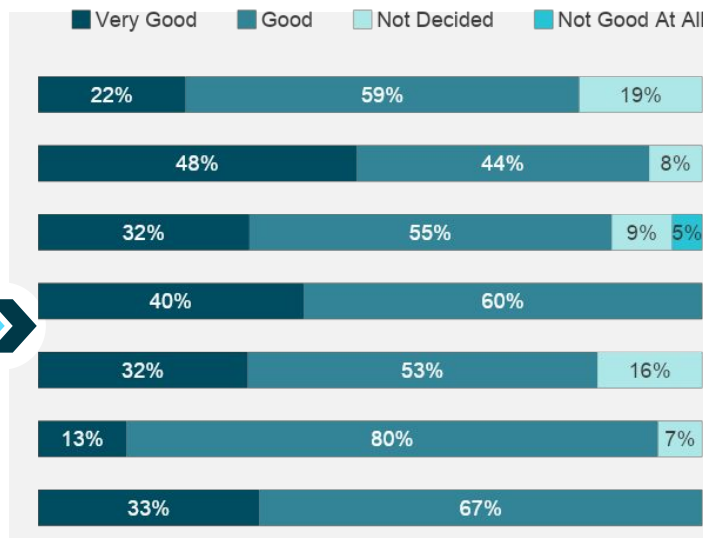
Do you use any evaluation tool to measure the success of coaching?



Which of the following evaluation tools are used to measure the success of coaching?



Please indicate the quality/appropriateness of each evaluation tool when used to measure the success of coaching.



Something to ponder:

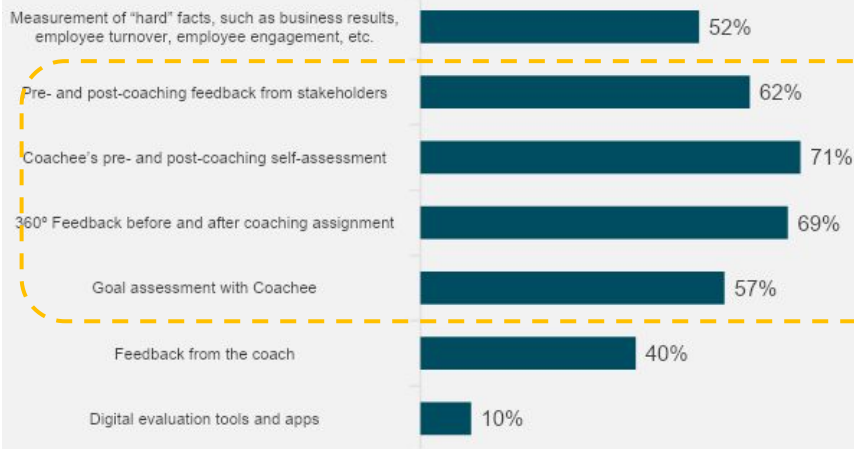
Digital evaluation tools and apps received 100% good feedback. Any reasons behind this? Or is there any opportunities to promote among companies?

Measurement of Coaching Success

The majority measurements of both Companies and Coaches are the same with different rankings.

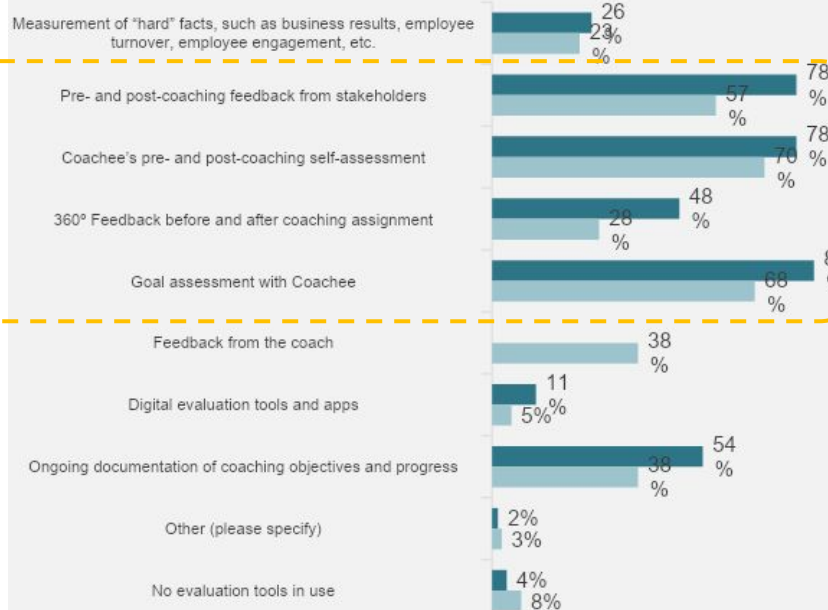
Q. Which of the following evaluation tools are used to measure the success of coaching? (Company Representative)

CR (n= 42)



Q. Which of the following evaluation tools do you use to measure the success/impact of your coaching assignments?

EC (n=133) IC (n=40)

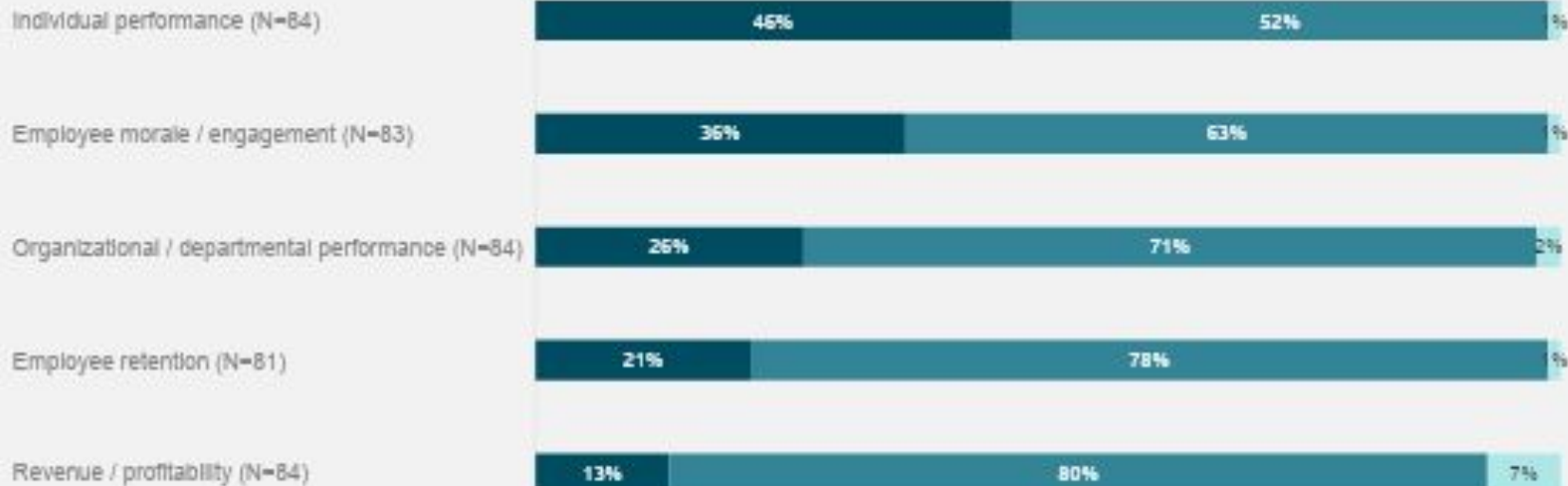


Coaching Impact

Most Companies who responded see some impact of coaching on their business bottom line.

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

■ Strong Positive Impact ■ Moderate Positive Impact ■ No Impact



Coaches Professional Development

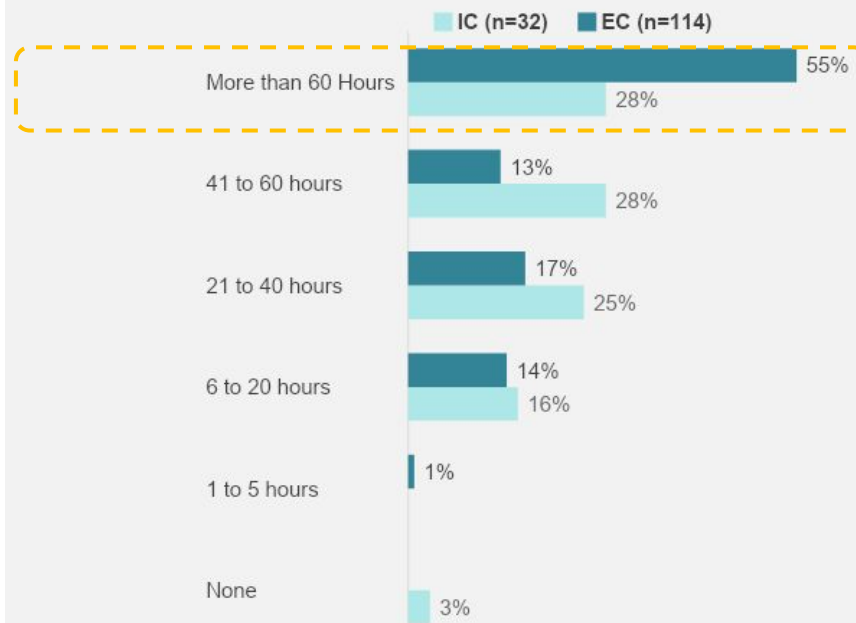
Professional Development of coaches - Practices and Time spent

While all coaches are leveraging multiple forms of professional development, ECs invest more in professional development.

Q. What forms of continuous professional development do you engage in? (Multiple Choice)



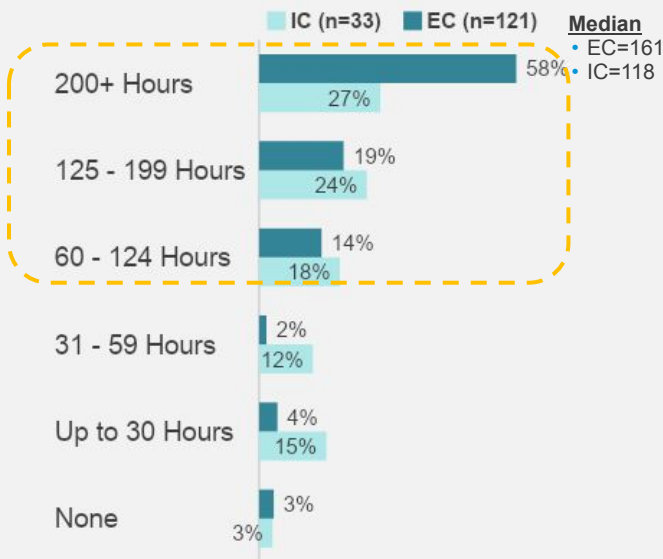
Q. How much time do you spend on continuous professional development (per annum)?



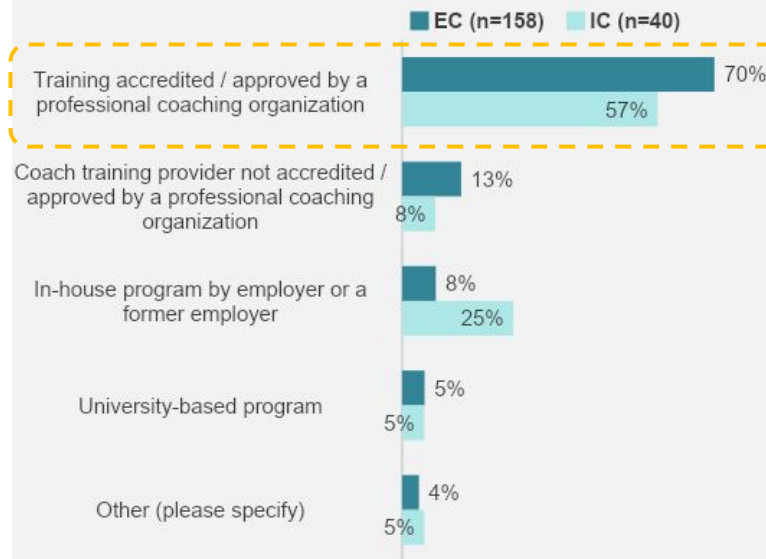
Coaches' Training and Education

On an average ECs received 161 hours of coaching specific education and training while ICs receive 118 hours, both longer than overall.

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



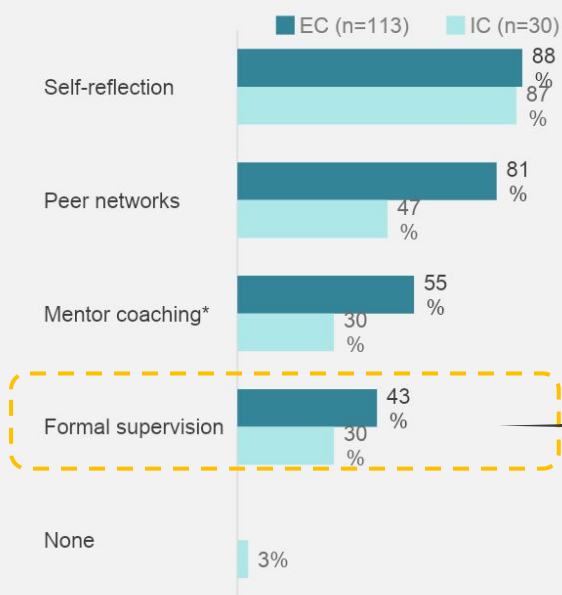
Q. Which of the following best describe the coaching education and training you have received?



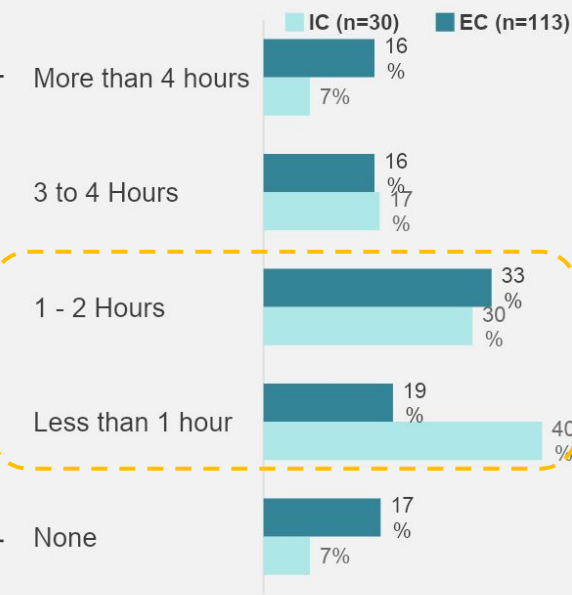
Reflective Practices/Coaching Supervision

Self-reflection as a reflective practice is the most commonly used practice and coaches in Mainland China are willing to invest on coaching supervision.

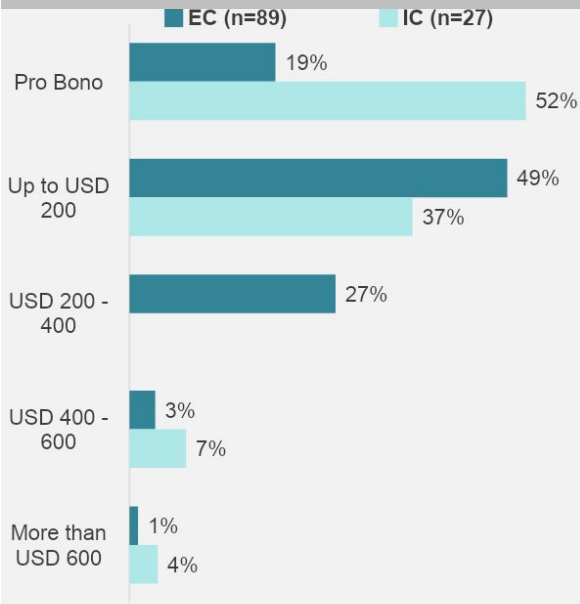
Q. Which of the following forms of reflective practices do you engage in as a coach? (Multi – choice)



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



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

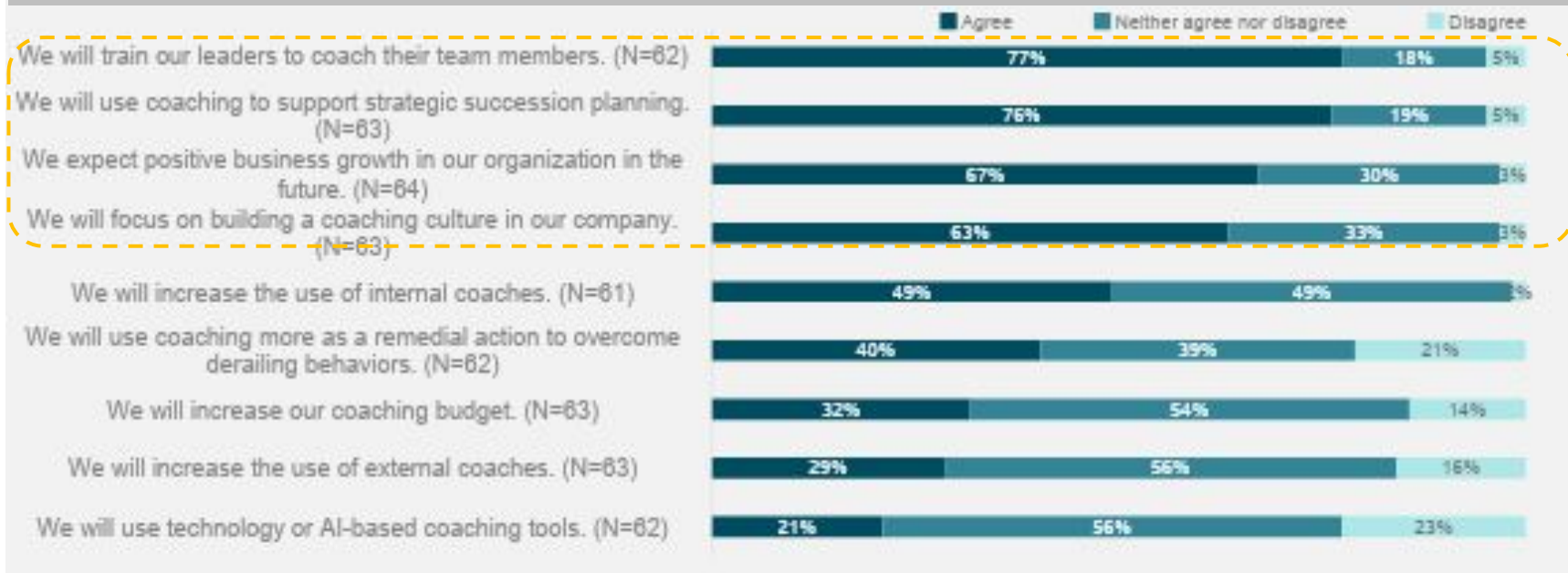


Future Outlook

Organizations Perspective on Future Outlook

Companies in Mainland China going all out to build internal coaching capability

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

With the desire of building internal coaching capability, how can companies leverage both internal coaches and external coaches to make intervention strategically?

Coaches Perspective on Future Outlook

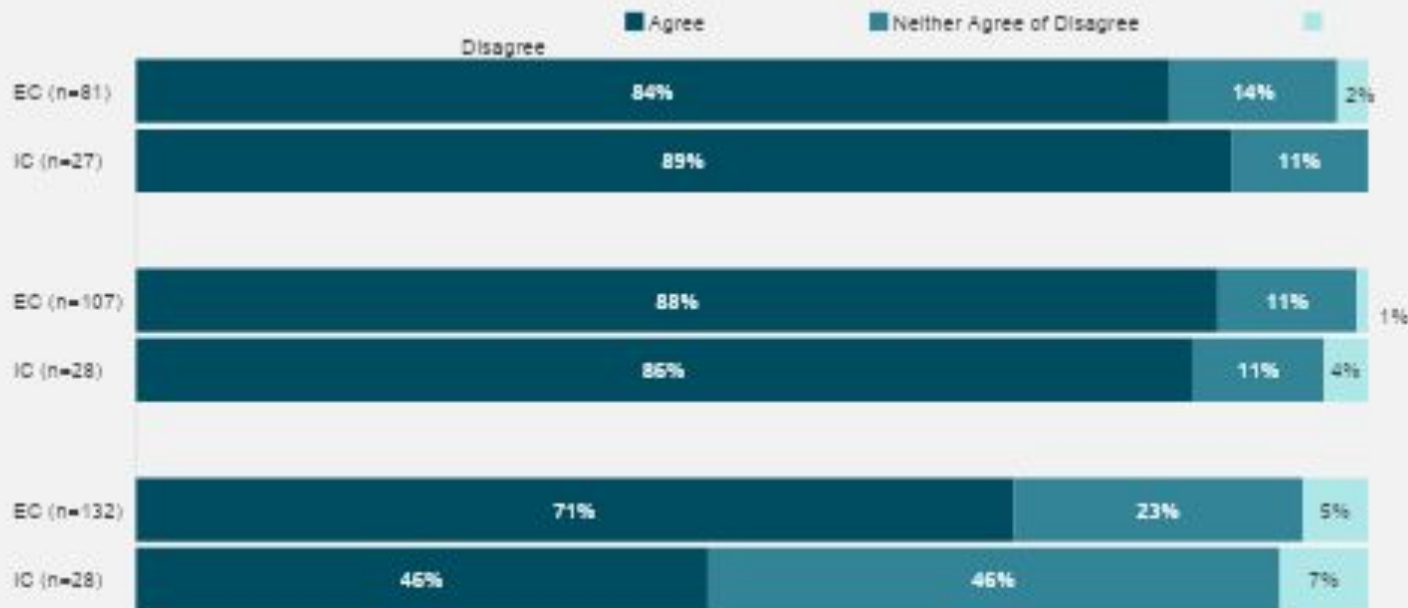
Coaches perceive a positive future outlook: increase in demand and supply of coaching offerings.

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

Coaching demand in the local market will increase.

The extent of my own coaching activities will increase.

The competition among coaches will increase.



Coaches Perspective on Future Outlook

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

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? What other skills/knowledge should coaches learn and adopt to meet the requirements?

Opportunities Emerging from the Survey

For Companies

- In VUCA age, how can companies in Mainland China align talent development strategy with business goals effectively? What role can coaching play in the talent development strategy?
- How can companies in Mainland China build internal capability for coaching, or namely, a coaching culture, leveraging different coaching modalities and tools?
- What can be measured to assess progress and effectiveness of coaching? How can companies in Mainland China align with coaches to make the measurement?

For Coaches

- Although the needs of coaching are increasing, how can coaches in Mainland China demonstrate the value and benefits of coaching to companies and individuals who are not using coaching and convince them?
- What marketing activities can coaches in Mainland China do to promote themselves to build the desired impact?
- How can coaches in Mainland China make the best use of professional coaching organization/association and credential body?
- How can coaches in Mainland China leverage technology to create coaching experiences more effectively and cost-efficiently?

Closing Thoughts

Closing thoughts

- We are happy to present to you the **Geography Report for Mainland China**, part of the **5th Coaching Survey – an Asia Benchmark**. An indepth and comprehensive Integrated Report is available on our website to give you an overall understanding of the coaching landscape for the six markets. Individual geography reports for Hong Kong China, India, Indonesia, Mainland China and Philippines are also available for a more detailed study.
- 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:*

Taruna Aggarwal

taruna@lifeby-design.com

coachingsurvey@apacoaches.org

Uma Arora

uma.arora@idamlearning.com

Cynthia Chan

cynthiac0107@gmail.com

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.



Thank You from the Project Team



Uma Arora
India
Project Manager



Taruna Aggarwal
Singapore
Project Leader



Cynthia Chan
Hong Kong
Project Support



Judie Gannon
Academic Advisor
Oxford Brookes University



Pansy Lam
Hong Kong



Mathilde Poirieux
Hong Kong



Rup Sengupta
India



Ina Rizkie
Indonesia



Maria Kosby
Indonesia



Annie Yang
Mainland China



Abby Zhu
Mainland China



Julius Ordonez
Philippines



Maria Althea Masangkay
Philippines