

5th COACHING SURVEY

An Asia Coaching Benchmark 2019

Geography Report – Hong Kong

Participating Markets:

Hong Kong, 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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We would like to acknowledge the team members who worked relentlessly on the survey design, sponsorship & distribution of the survey – **Cynthia Chan, Pansy Lam, Mathilde Poirieux** (Hong Kong), **Uma Arora, Rup Kumar Sengupta** (India), **Ina Rizkie Amalia, Maria Eko, Hairil Anwar** (Indonesia) **Yanyun Yang, Abby Zhou** (Mainland China), **Julius Ordonez, Maria Althea Masangkay** (Philippines), Taruna Aggarwal (Singapore)

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

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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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Introduction, Methodology, & Purpose

Introduction

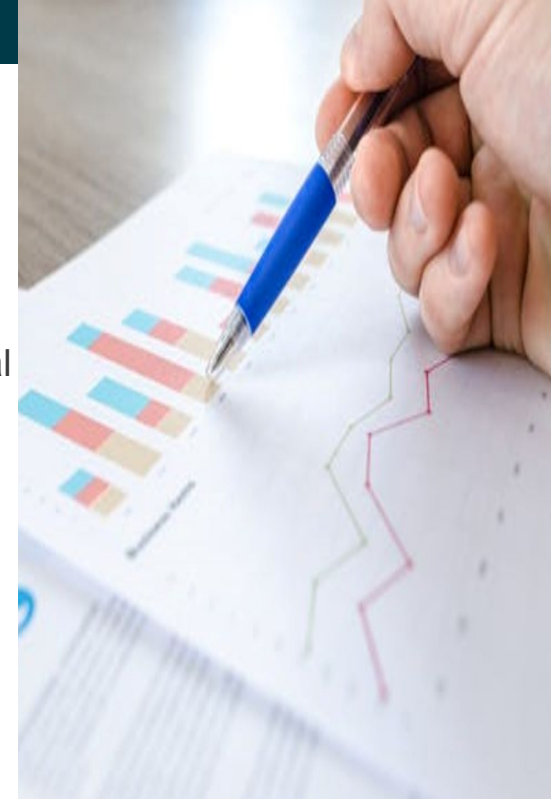
Purpose and Approach

- 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.

Methodology

Detailed & Robust

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



The Participants

Comprehensive Coverage from all three perspectives

CR

Company/ Organization
Representative

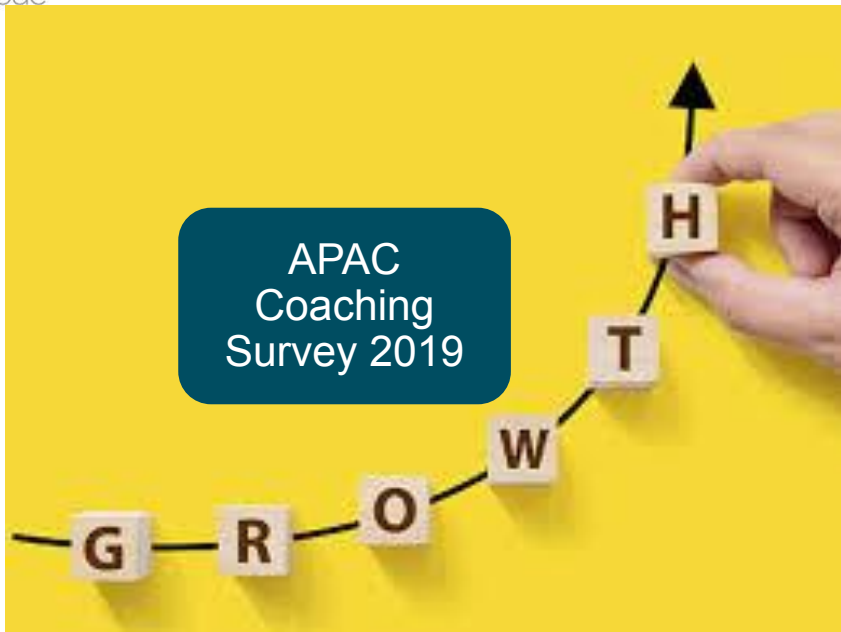
A company/organization representative ideally works in the field of HRM/HRD or is a senior member of the leadership team who is privy to the coaching interventions in the company/organization.

EC
External Coach

An external coach offers coaching services to 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	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



	2010	2012	2014	2017	2019
Languages	NA	NA	NA	1	3
Total Participants	NA	NA	NA	184	155
Companies	NA	NA	NA	61	45
External Coaches	NA	NA	NA	101	101
Internal Coaches	NA	NA	NA	22	9

Progress over the years

More than 100% growth in participation in 2019 over 2017

Thank you Sponsors

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Gold Sponsors



Creating Possibilities for
People and Organizations

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COACH A is a global executive coaching firm that works with corporate executives as the starting point to drive organizational growth in order to improve corporate performance. We accelerate organizational development through data analysis that utilizes cutting-edge technology and research, while paying attention to the relational dynamics in the organization. We offer a unique systemic coaching approach for clients around the world that promotes empowered actions in the organizations.

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Top 8 Trends/Insights

Top 8 Trends/Insights

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 Hong Kong:

- 67% of the companies are using coaching in HK compared to overall 75%
- While HK is a relatively more established coaching market, 33% of HK companies have never used coaching. 5% (overall 2%) said they are unlikely to introduce coaching
- Top reason for HK companies unlikely to introduce coaching is **cost** while overall report indicates that the top reason is coaching concept not well known (this applies to 2017 survey data as well)

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?

How do professionals in the field promote the concept of coaching to the community?

Top 8 Trends/Insights

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 Hong Kong:

- **Most companies work with a combination of ECs and ICs. 16% engage only ECs**
- **Organizations find ICs more cost effective - HK has a relatively lower % than overall (HK 67% vs 82% overall)**
- **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. ICs see a strong advantage in knowing the context, while ECs value more their external perspective; companies have mixed views.**

Is knowledge of the company more an asset or more a barrier for coaches to bring new perspectives?

How may neutrality of the coaches play a role in the benefits of coaching?

How could coaches better support companies in clarifying what they need most?

Top 8 Trends/Insights

3. General concern about IC's role not being very 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 Hong Kong:

- **For 75% of organizations, coaching is less than 51% of the IC's job responsibilities**
- **While 88% ICs agree that coaching is part of their job & development, 75% feel it is not linked to compensation and 63% not linked to performance review**
- **ICs spent 67% of the time in leadership, career/transition coaching and 56% of their time in executive coaching, communication skills and performance coaching**

Top 8 Trends/Insights

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 HK:

- **coaches engage in slightly more supervision than in other markets although they spend less time on it; most coaches get supervision pro bono, one third pay up to USD 200 / hour**
- **coaches spend less time in professional development (60h+: EC in HK 26% vs. 41% overall, and IC in HK 13% vs. 23% overall); coaching webinars are more popular in Hong Kong. Strong majority of coaches received training from accredited coaching organizations with slightly more University based programs compared to other markets**
- **HK ICs is reported to have more in-house programs by employers (HK63% vs overall 39%)**

How ready are HK coaches to invest time and money on formal supervision and mentor coaching as ways for professional development and sustainable well-being? How much would ICs in HK benefit from in-house programs that would be accredited or credentialing?

Top 8 Trends/Insights

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 Hong Kong:

- **This effect is less pronounced in HK compared with other geographies where 98% in HK (96% overall) agree with John Whitmore's definition of coaching. Elements of guidance and expertise sharing are also significantly less in HK.**

How could HK coaches communicate on the value of coaching as a unique and impactful approach, while honoring the cultural values of Hong Kong?

Top 8 Trends/Insights

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 Hong Kong:

- **Similar trend in coaching quality satisfaction rates with slightly more (3.7 vs 3 out of 10) undecided on quality of coaching and fewer (3%HK vs 7% overall) not happy with the quality of coaching services.**
- **Re impact of coaching on bottom line, 58% (vs 84%) of companies see some impact while 42% (vs 16% overall) reported no impact.**
- **Also fewer companies in HK use evaluation tool to measure success of coaching. There is heavy reliance of stakeholders' feedback (93% vs 58% overall) and measurement of hard facts is also lower. Interestingly, more companies reported they have not received benefits sought.**

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 Trends/Insights

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

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

- **About 50% reported to have requested for coachees' assessment results and specific coaching content from coaches.**
There is also a relatively lower request from companies on compliance of code of ethics (HK37% vs 51% overall) and checking of certifications and references (HK19% vs 31% overall)
- **Coaching experience is also the most important selection criteria followed by chemistry, language and coaching style while credentials ranked #6 (vs #4 overall).**

Top 8 Trends/Insights

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 Hong Kong:

- Almost all coaches in HK (92% EC and 100% ICs) are not using AI technology.**
- Perhaps AI has not yet penetrated the coaching industry in Asia. It might be interesting to compare this trend with data in the west.**

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 Hong Kong:





- HK companies also plan to increase focus on building in-house coaching capability, 31% (vs 16% overall) indicate they will not increase in the use of external coaches and 44% (vs 22% overall) said they will not use technology/AI based coaching tools.**

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

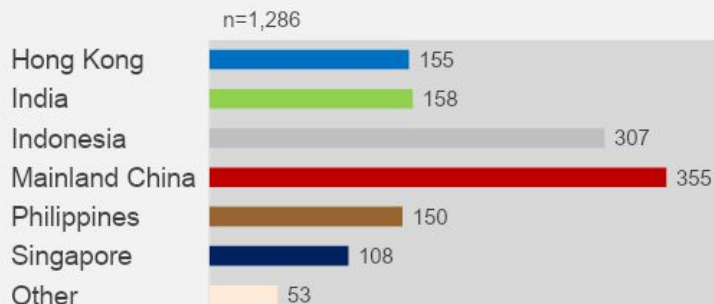
Participant Overview & Distribution

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



Participant Overview & Distribution

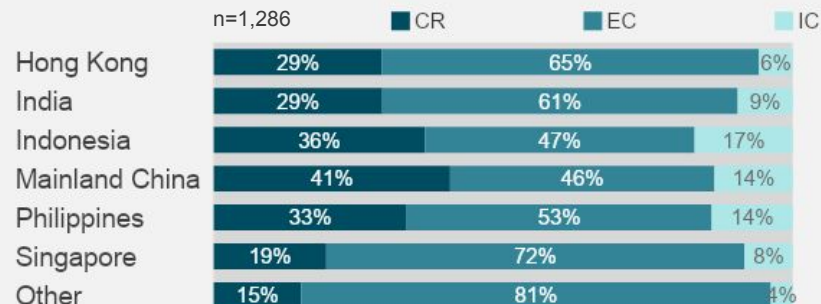
Markets



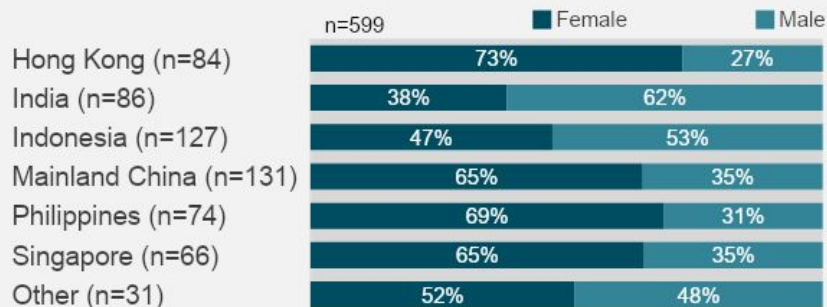
Role



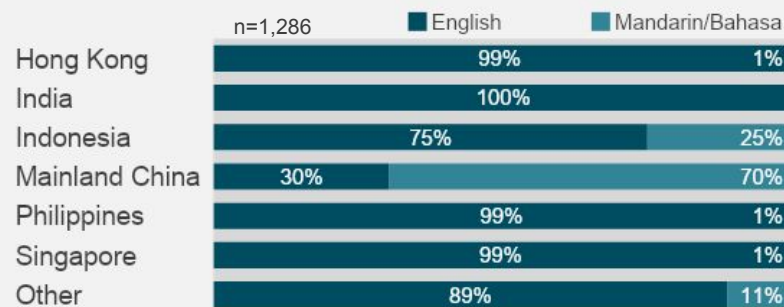
CR= Company/ Org Representative, EC= External Coach, IC= Internal Coach



Gender (EC & IC)



Language used for Survey



- In 2017 Survey, the ratio of Female vs Male for HK was 56% to 44%

Participating Organizations - Distribution by industry sector and type

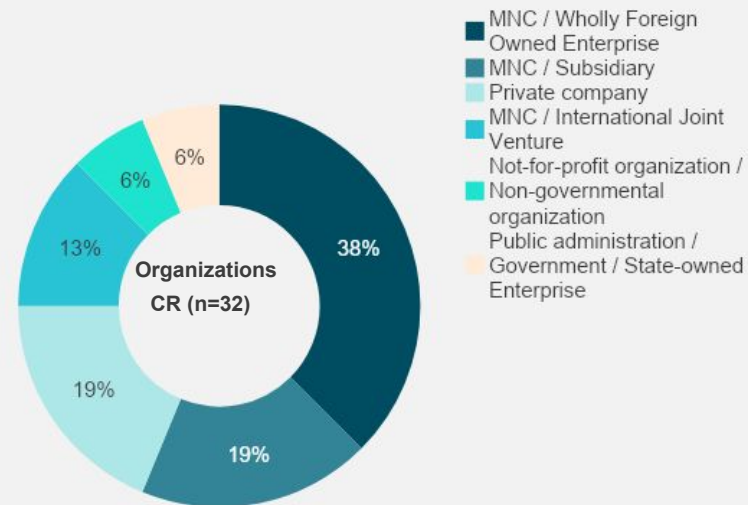
Well diversified sample from several industry sectors.

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



MNCs which are Wholly Foreign Owned Enterprise are the largest participants

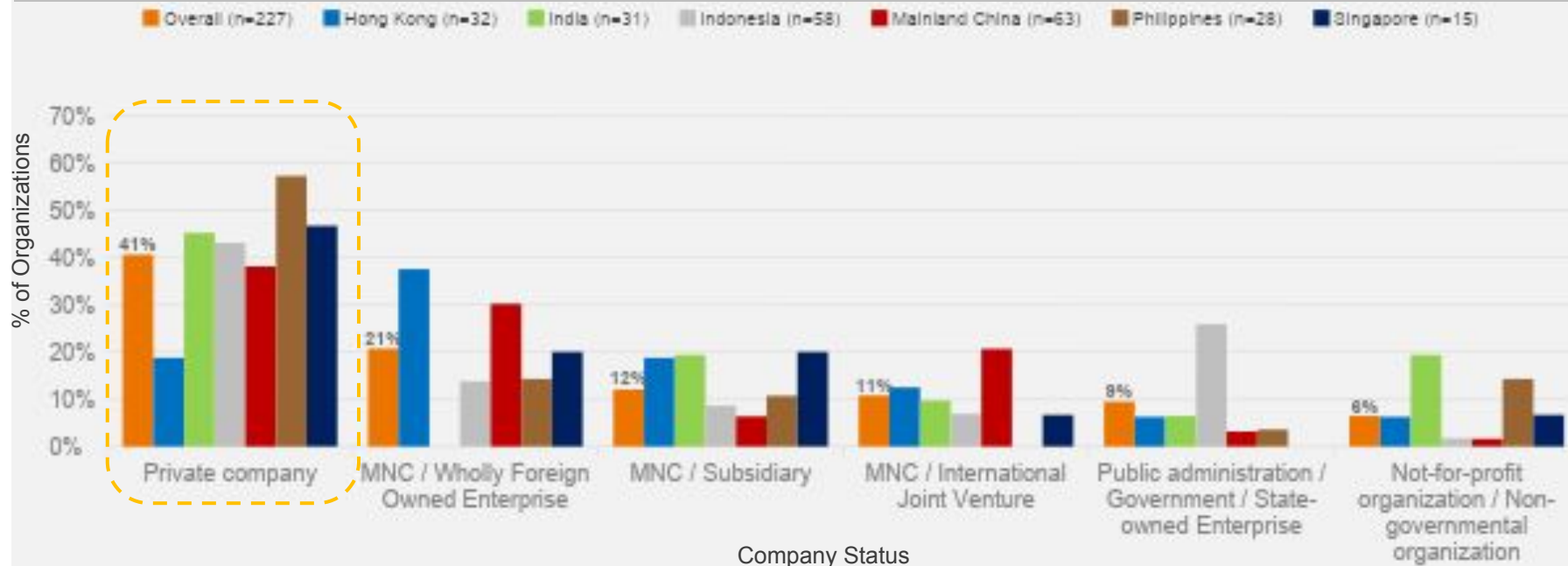
Q. What is your company status?



Types of Participating Organizations

Private companies are the largest participants across markets barring Hong Kong

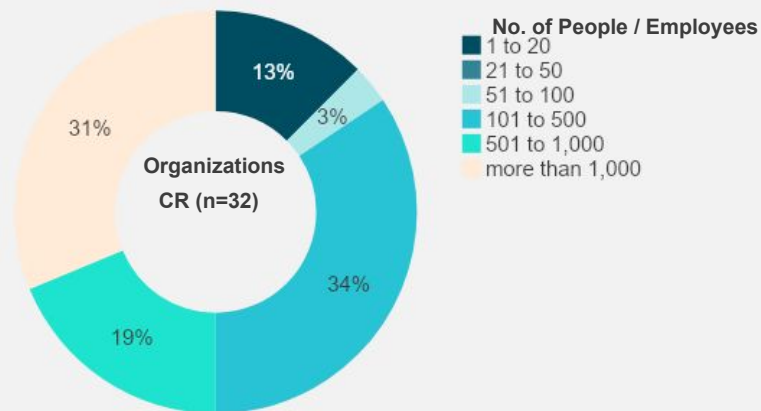
Q. What is your company status?



Participating Organizations – Distribution by Employees and Revenue

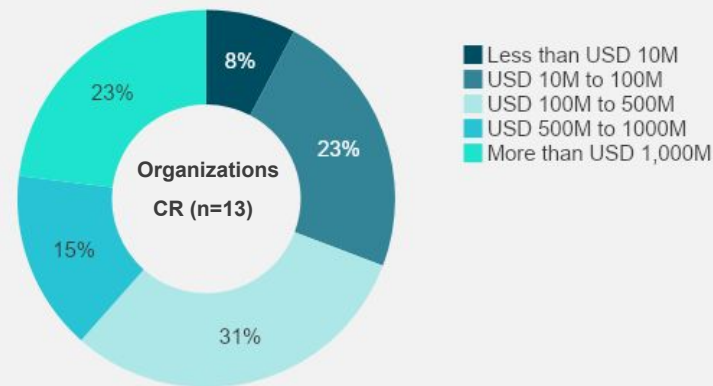
84% of the organizations employ more than 100 people

Q. How many people does your company employ locally?



Well Diversified sample from varying revenue brackets

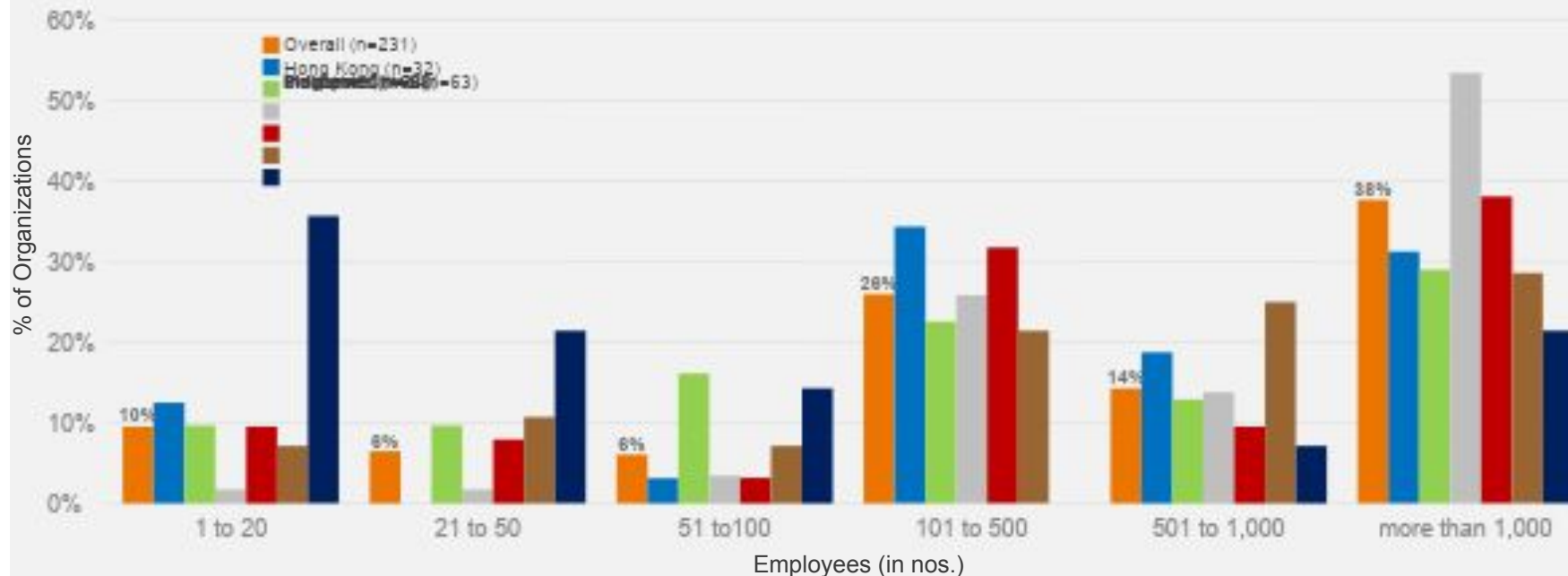
Q. What is the company size in terms of revenue in USD million per year (local market only)?



Participating Organizations by Number of Employees

Employee population sample size varied in different markets

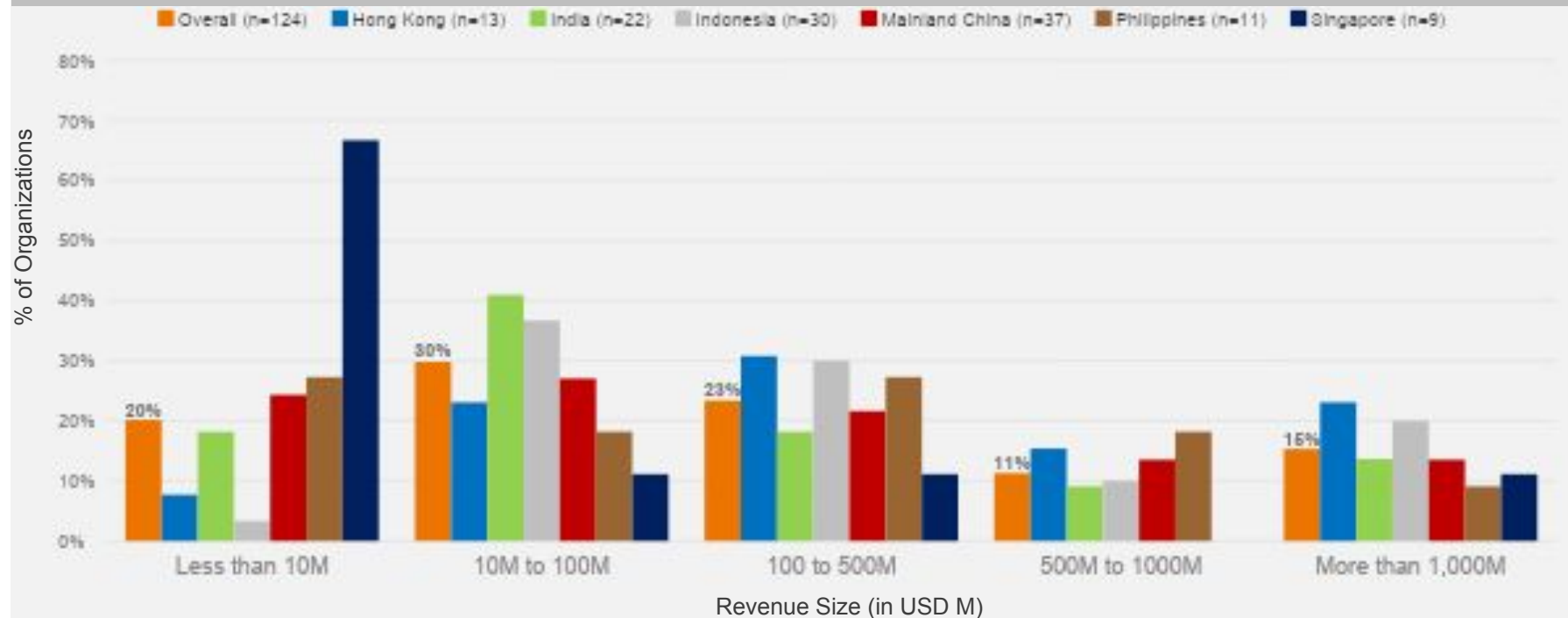
Q. How many people does your company employ locally?



Participating Organizations by Revenue Size

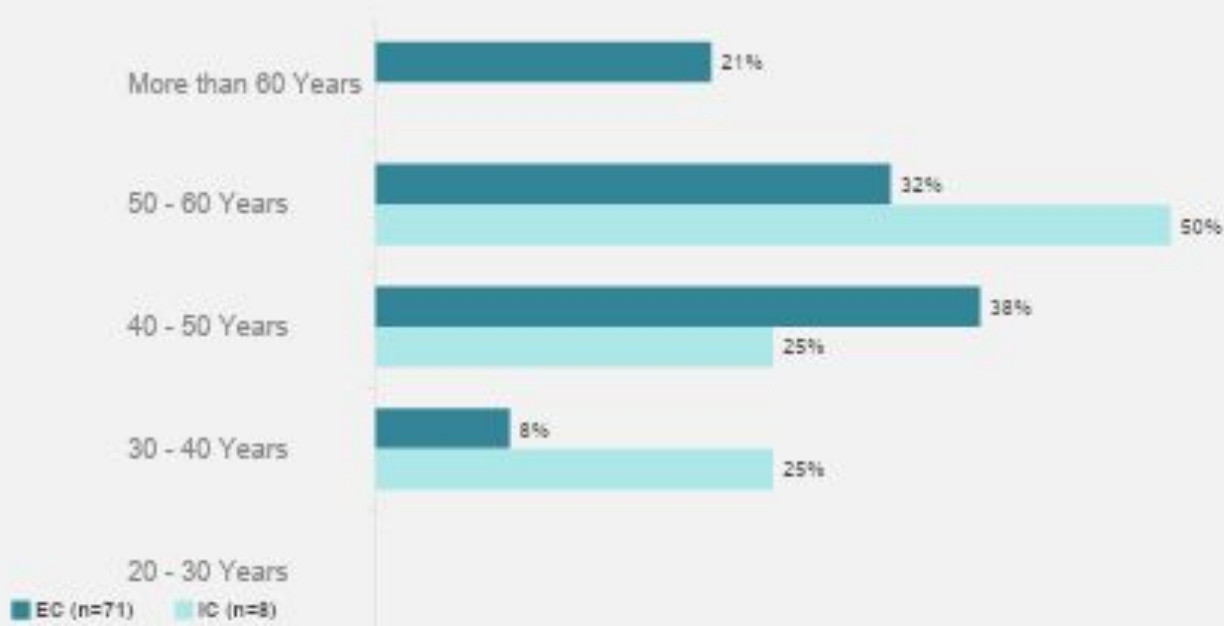
Market –wise breakdown

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



Distribution of Coaches by Age

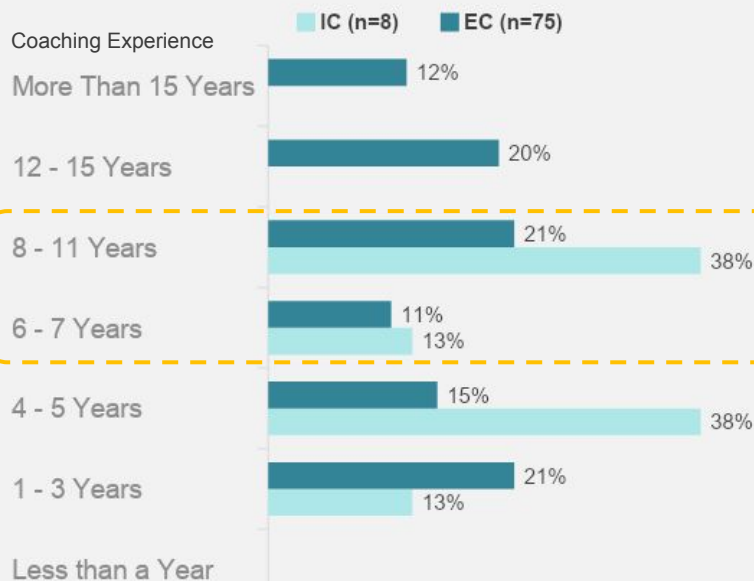
Median age of ECs is 51 years and ICs is 49. HK ICs are a little more mature with 50% at 50-60 years old vs 30% in the overall markets



Distribution of Coaches by Years of Experience

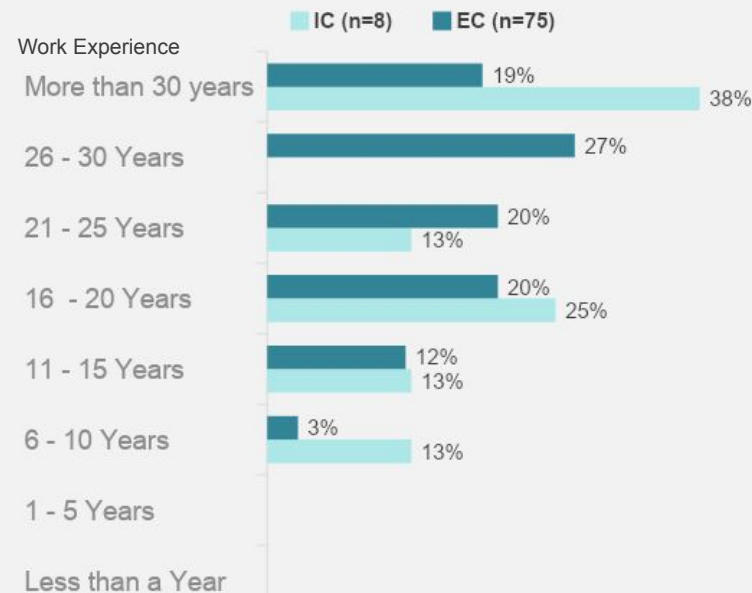
ECs have average coaching experience of 9 years , ICs have average coaching experience of 6 years

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



ECs have average work experience of 26 years , ICs have average work experience of 23 years

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



ECs have relatively more coaching/work experience than ICs – consistent with overall market data

Typical EC Participant

The ECs in Singapore, India and HK 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 (n=76)	74% (59%)	51.0	50.5 (49)	8.0	9.1 (8)	80% (72%)
India (n=76)	39% (39%)	52.0	52.9 (51)	8.0	9.9 (7)	85% (65%)
Indonesia (90)	54%	46.5	46.9	3.0	5.7	60%
Mainland China (n=103)	67% (64%)	46.0	46.3 (47)	4.0	6.8 (7.2)	72% (64%)
Philippines (n=58)	69%	51.0	53.0	5.5	6.8	76%
Singapore (n=58)	64%	50.0	51.8	9.0	10.4	80%
Other (n=30)	53%	51.5	50.2	7.0	11.0	77%
Overall (n=491)	60%	49.0	49.7	5.0	7.9	75%

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

Nos. in bracket are from 2017 Survey

Typical IC Participant

The ICs in India and Singapore have more coaching experience than the ICs in HK, 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 (n=8)	63%	48.5	46.1	5.5	6.0	75%
India (n=10)	30%	53.5	52.1	12.5	13.8	70%
Indonesia (n=37)	30%	43.0	42.8	2.0	3.2	44%
Mainland China (n=28)	57%	39.0	39.6	2.0	3.3	32%
Philippines (n=16)	69%	40.0	41.4	3.0	4.3	56%
Singapore (n=8)	75%	49.0	47.3	9.0	8.8	88%
Other (n=1)	0%	36.0	36.0	4.0	4.0	0%
Overall (107)	48% (64%)	42.0	43.2 (43)	3.0	5.0 (5.8)	50% (46%)

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

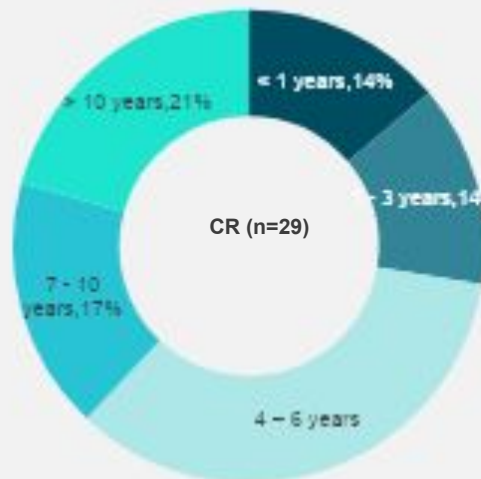
Landscape of Coaching Market

Prevalence of Coaching Services

Coaching is a relatively established concept in Hong Kong with relatively more companies using for more than 10 years and strong majority of companies using coaching for 4-10 years.

>10 years 21 % HK vs 11% overall; 4-10 years 72% HK vs 27% overall and <3 years 28% HK vs 62% overall

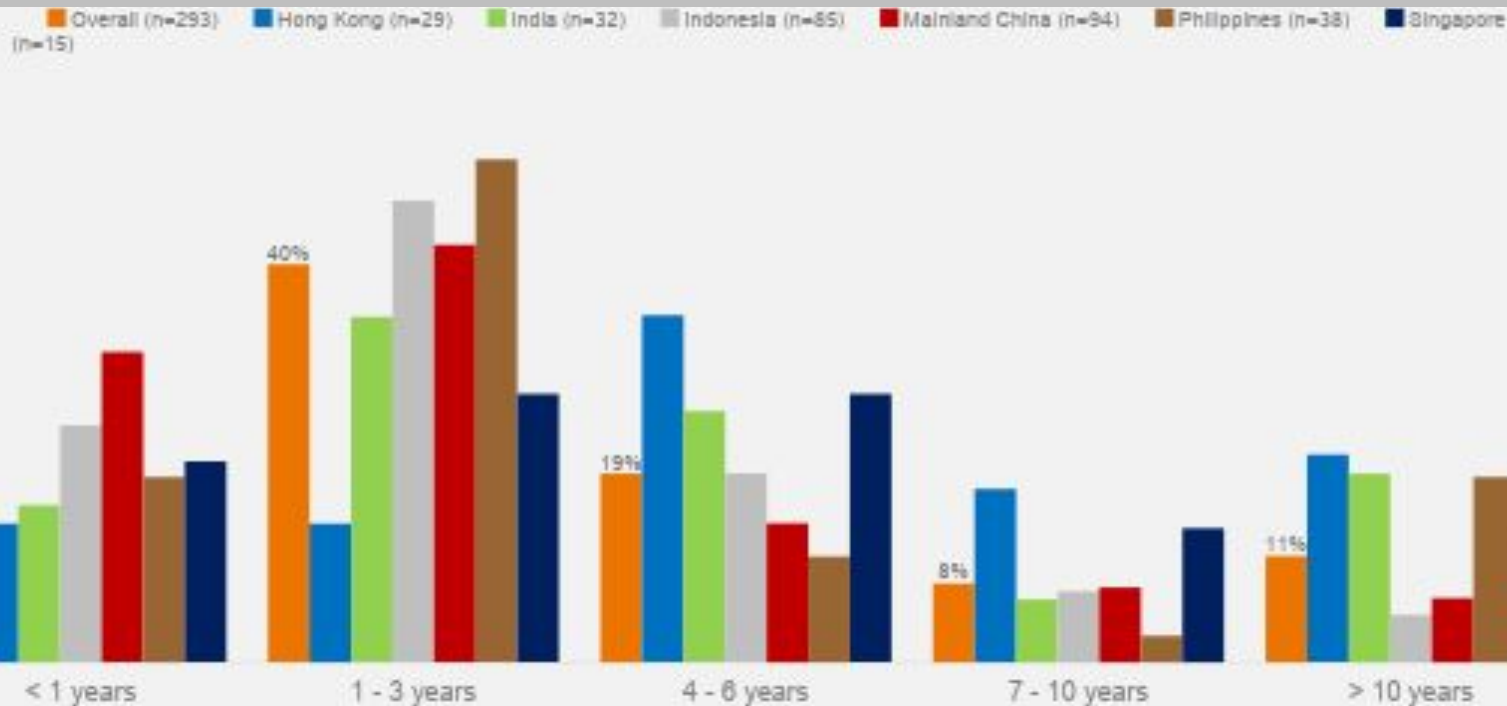
Q. How long your company has used coaching in your market location?



Prevalence of Coaching Services – By Market

Relative to other markets, HK is more mature in providing coaching services.

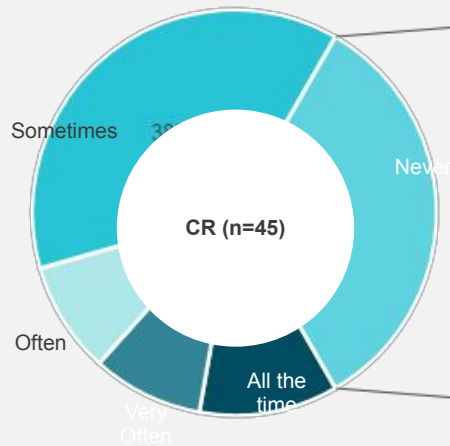
Q. Please indicate how long your company has used coaching in your market location?



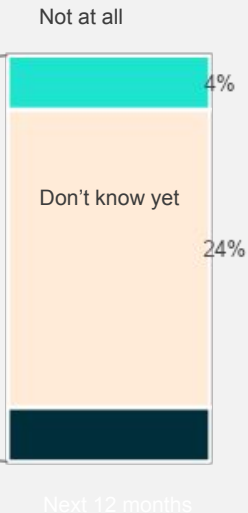
Adoption of Coaching

29% companies use coaching all the time/very often/often while 33% of the companies have never used coaching. Top reason for HK companies unlikely to introduce coaching is cost while overall report indicates that the top reason is coaching concept not well known (this applies to 2017 survey data as well).

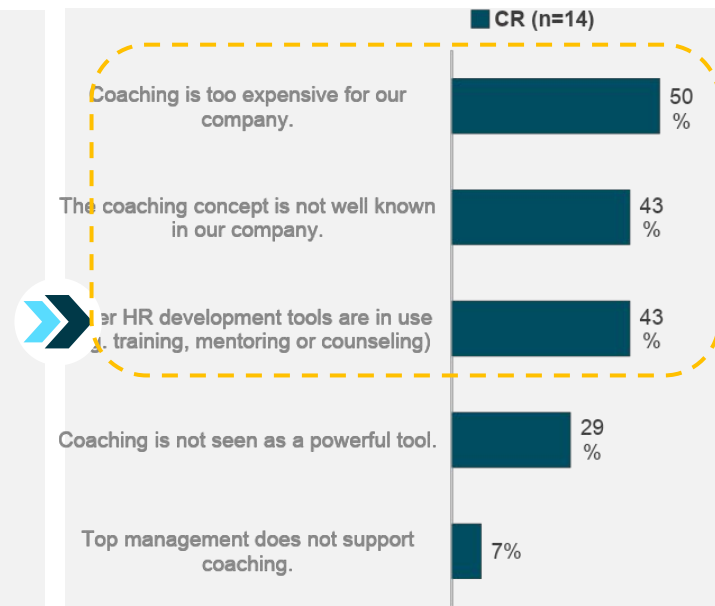
Q. How frequently does your company use coaching services?



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



Q. Reasons why your company is unlikely to introduce coaching (Multiple Choice Question)



In the 2017 Survey, ~40% companies were not using Coaching services

Something to ponder: While HK is a relatively more established coaching market, it has a higher % of companies who have never used coaching and don't know whether they would like to introduce it. What opportunity does this present to coaches?

Usage of Coaching Services - by Market

67% of organizations in HK that participated have used coaching services

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



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

Coaching Services Adoption by Type of Organization

Coaching is adopted more widely by MNCs followed by local private companies and others.

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



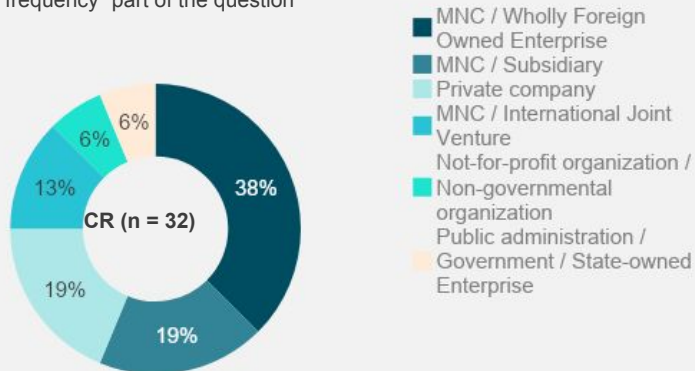
Something to ponder: Local private companies, government and NGOs may be potential markets to reach out to.

Target Clientele

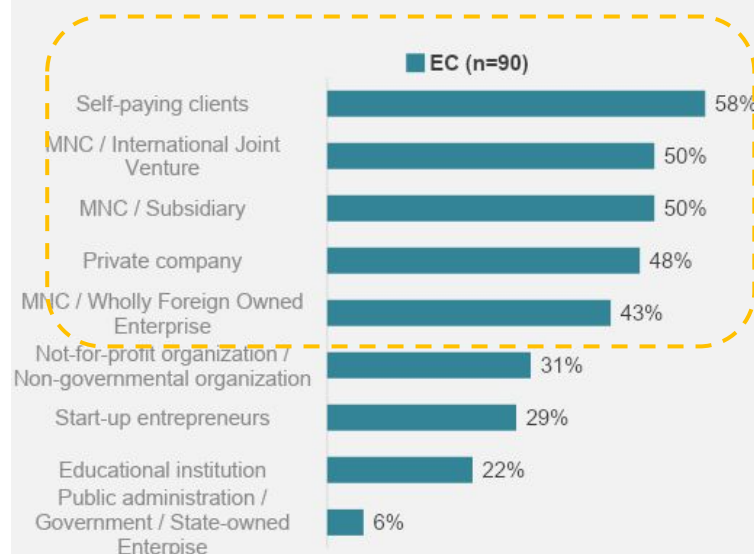
70 of the companies using coaching are MNCs and 19% are private companies. 58% of ECs have Self-Paying clients and about 50% of their clients are MNCs while 48% are private companies.

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

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)

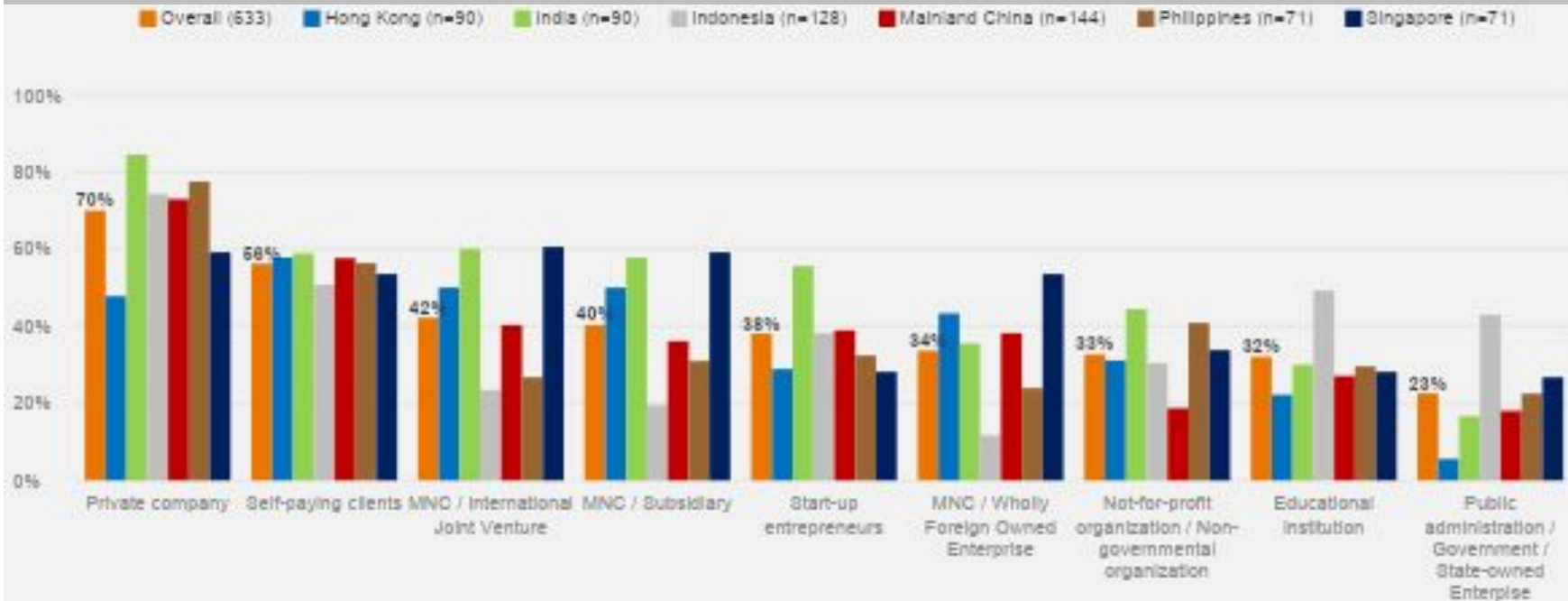


Something to ponder: It is interesting to note there is a high % of self-paying clients. What could be the reasons for them to pay for their own coaching?

EC Target Clientele – By Market

The distribution of coaching adoption is focused on MNCs and self paying clients. Coaching adoption in the other sectors are relatively lower than other markets especially for private companies, start up entrepreneurs, education and government.

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

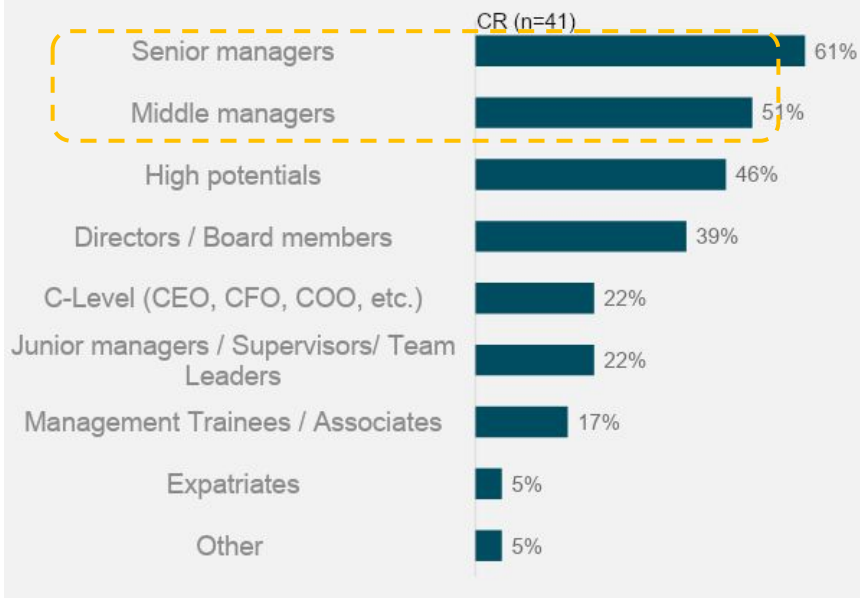


In the 2017 Survey, the top 4 were Wholly Foreign Owned Enterprise, International JV, Private Local company and Self-paying clients

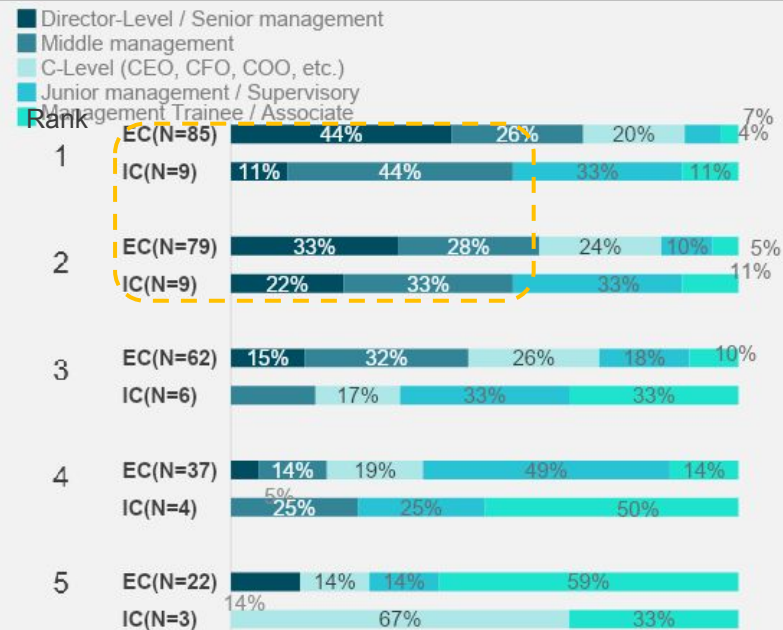
Target Groups for Coaching Services

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)



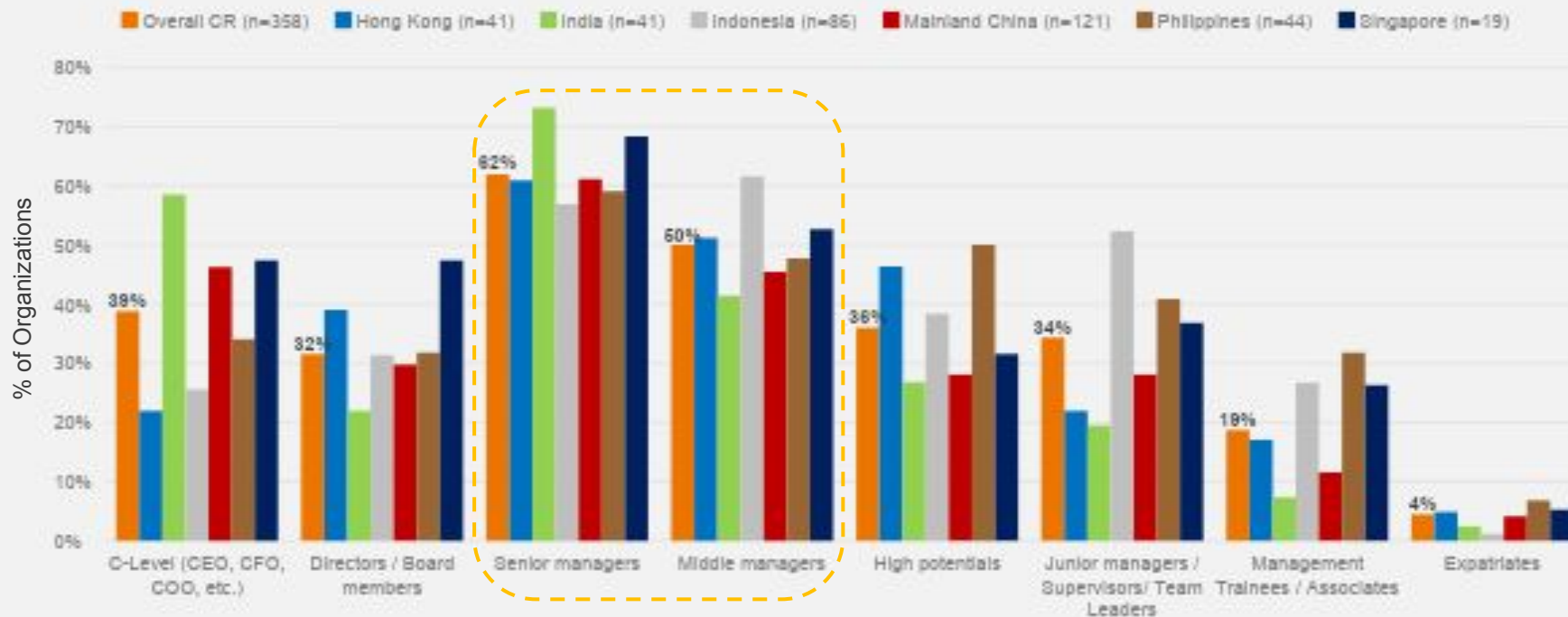
Q. Please select and rank the corporate level/position of your coachees. (Multiple Choice)



Target Groups for Coaching Services - By Market

Currently senior and middle managers are the main target groups of coaching services across all markets.

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



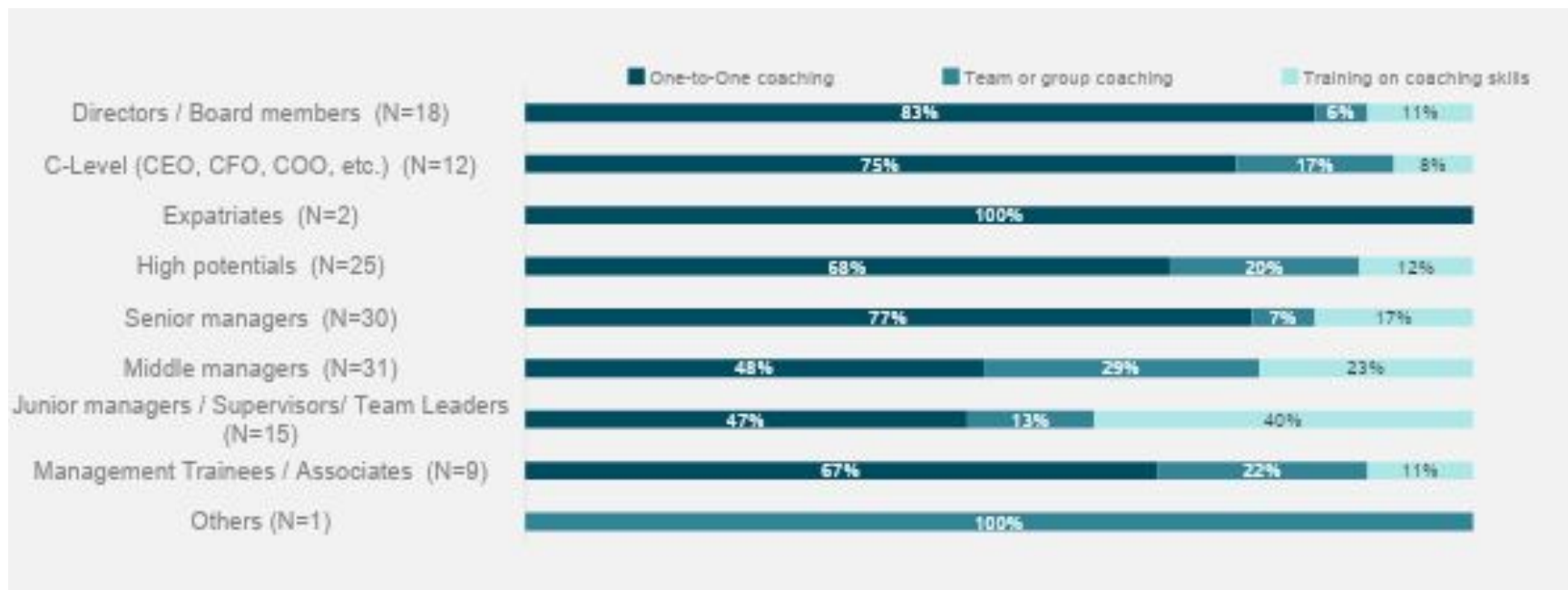
In the 2017 Survey, organizations offered coaching to all management levels. Senior management level is targeted more for coaching in China than in HK and India

Types of Coaching Intervention - By Target Groups

One on one coaching is mainly offered to more senior levels as well as management trainees while team/group coaching is offered across all levels with more popularity to middle managers and high potentials.

Coaching skills training is also offered across all levels and mostly to junior managers and supervisors (40% HK vs 28% overall).

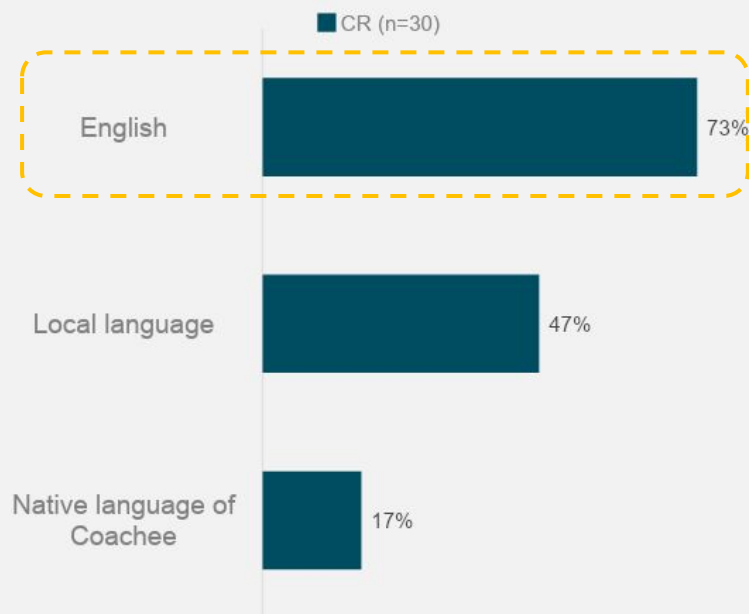
Q. Which 'type' of coaching interventions do you offer to the target groups selected in the previous question?



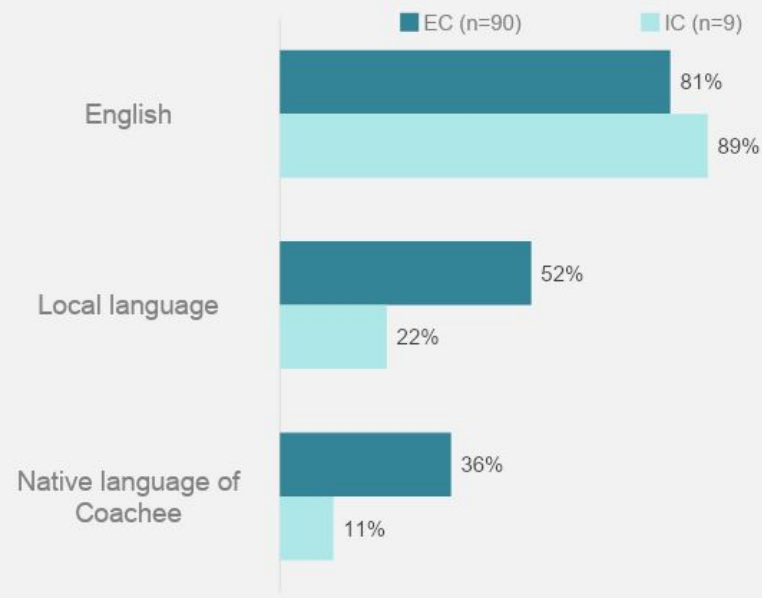
Preferred Language for Coaching

In HK, English is mostly used for coaching (For CR: HK 73% vs 45% overall) followed by local language (47% HK vs 63% overall). Native language of coachee is more used by ECs (For ECs: HK 36% vs 22% overall).

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



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

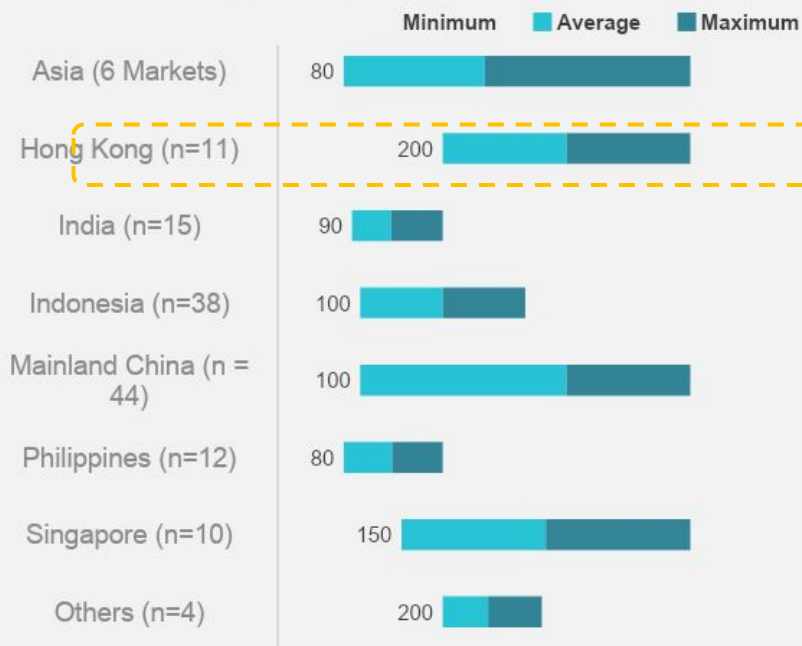


Something to ponder: While the majority of local Hong Kong population do not have English as their native language, the demand for coaching to be delivered in English is 80-90%. To what extent is the local supply of coaches meeting local demand?

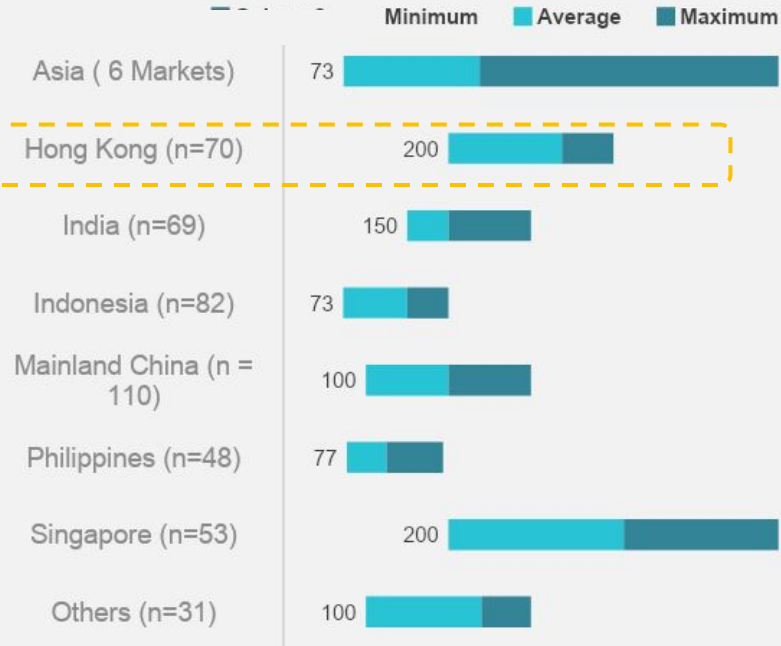
Coaching Rates

HK ranks second after Singapore in having the highest coaching rates. The average coaching rates quoted by Companies is higher than that of coaches.

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)

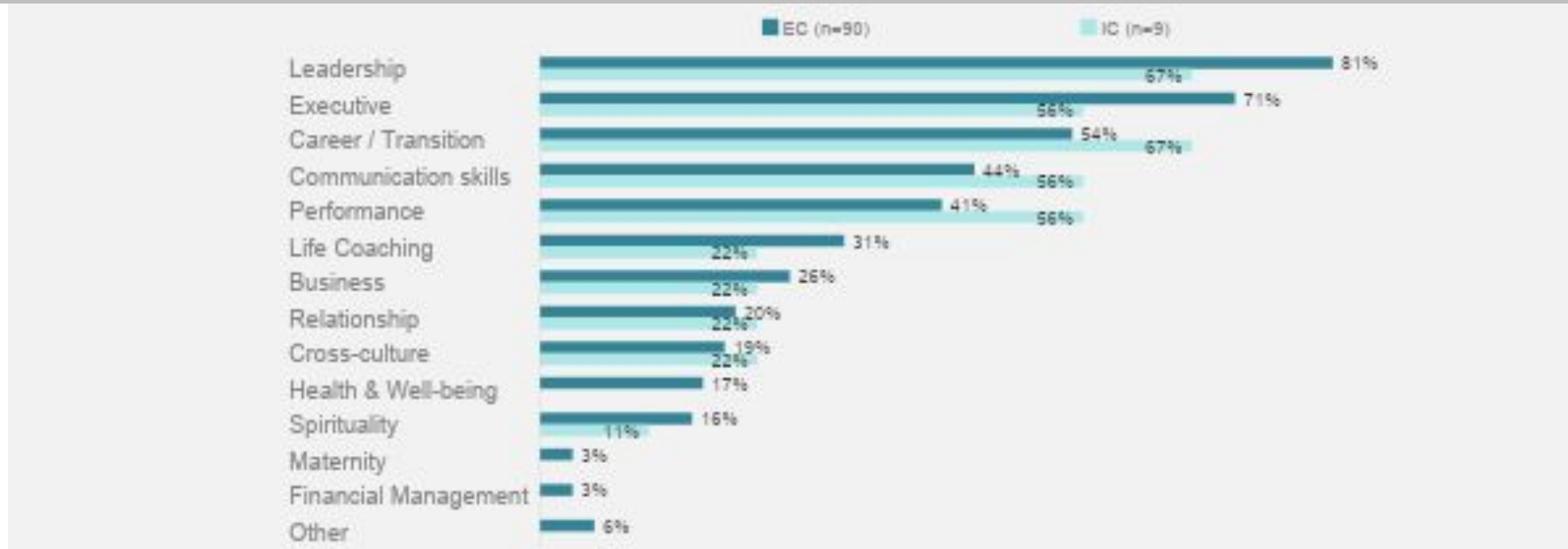


Something to ponder: Companies seem to perceive coaching as more costly than what coaches reported.
How transparent are coaching fees to companies?

Coaching Specializations

ECs are more focussed on leadership (81%) and executive coaching (71%) while ICs spent 67% of the time in leadership, career/transition and 56% of their time in executive coaching, communication skills and performance.

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

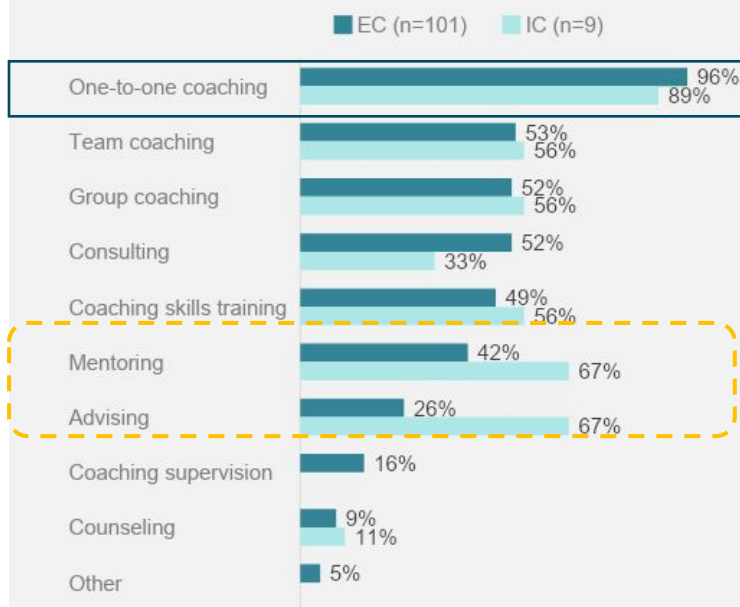


Something to Ponder: ECs are creating new and unique niches for themselves like life coaching, business coaching, health and well being as well as spirituality while ICs are covering life coaching, business coaching, relationship and cross culture. How do coaches stay relevant in response to competition and changing needs?

Range of Coaching & Related Services

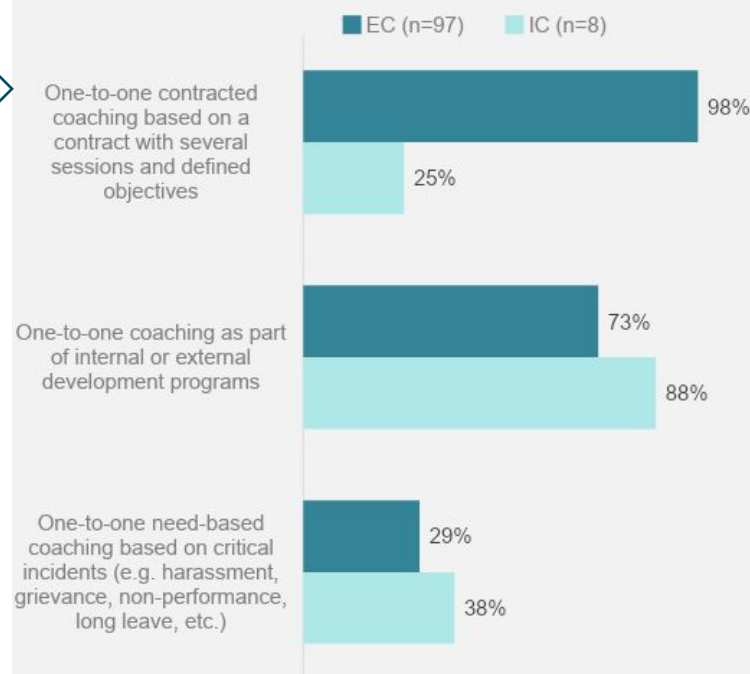
Both ECs and ICs do a lot of one-to-one coaching while ICs do more mentoring and advising than ECs.

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



ECs offer more of contracted based coaching while ICs offer more coaching as part of development programs

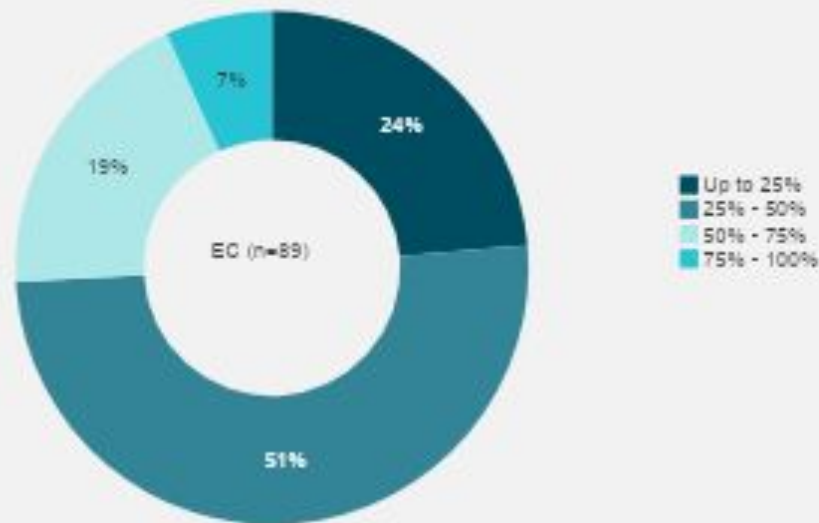
Q. Please describe the type of One-to-One coaching service offered by your company. (Multiple choice)



Proportion of Work-time Devoted to Coaching Sessions

51% of ECs spend between 25% to 50% of their time on coaching sessions while only 7% spend over 75% on coaching sessions.

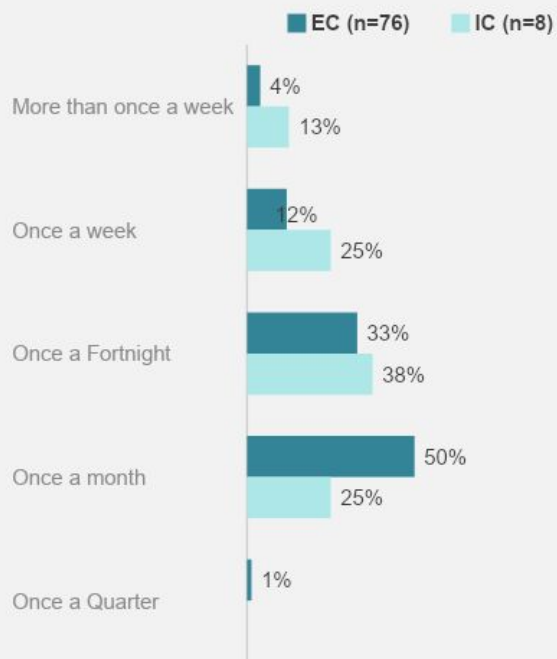
Q. What proportion of your working time is allocated to coaching sessions?



Frequency and Duration of Assignments

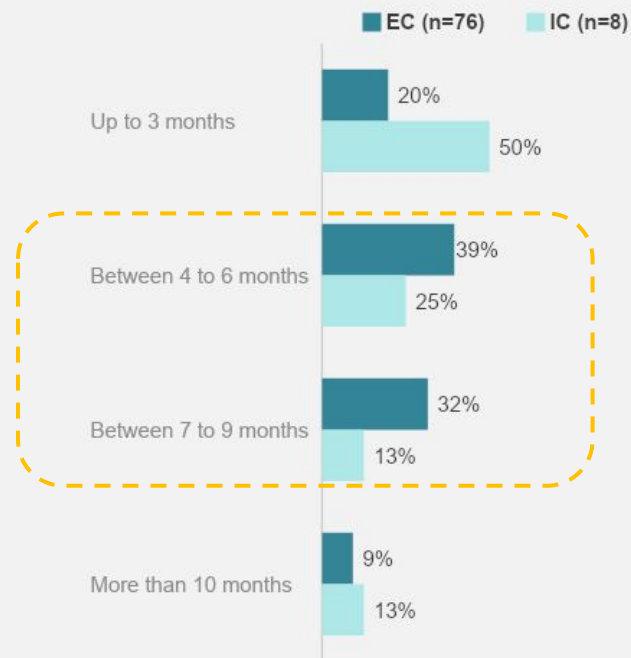
ICs deliver more frequent coaching sessions.

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



ECs have longer coaching assignments.

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



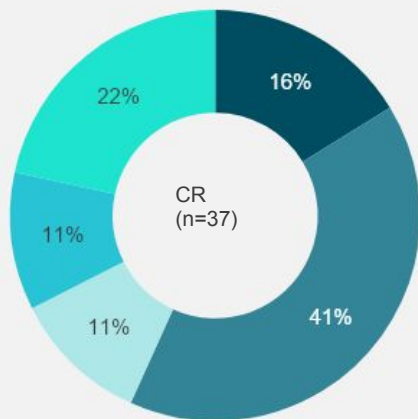
Engagement and Perception of Internal Coaches

16% of organizations engage the services of only ECs. Most organizations work with a combination of ECs and ICs.

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

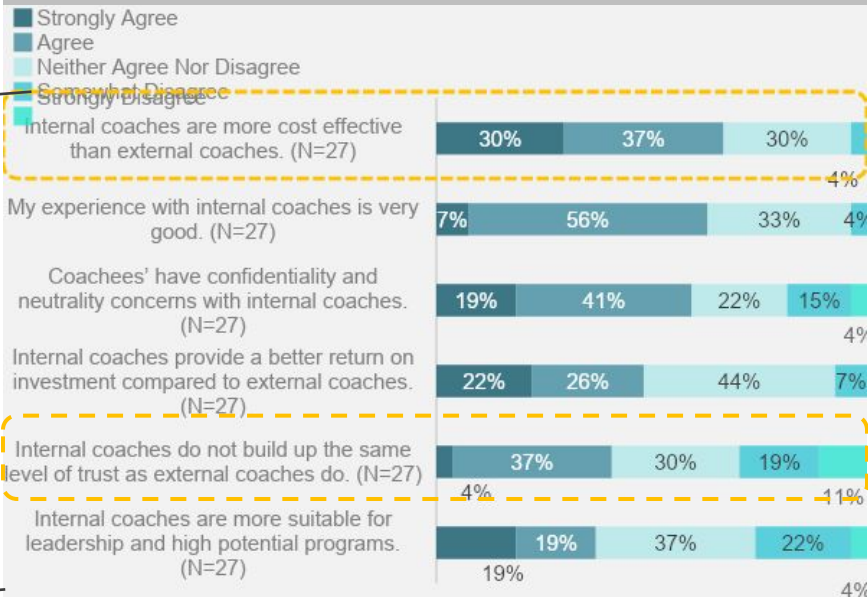
% of Internal Coaches used

- Only External Coaches
- Up to 30%
- 31% to 60%
- 61% to 90%
- 91% to 100%



Organizations find ICs more cost effective (more so in other markets - HK 67% vs 82% overall). However, there are issues with building the same level of trust as ECs do.

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

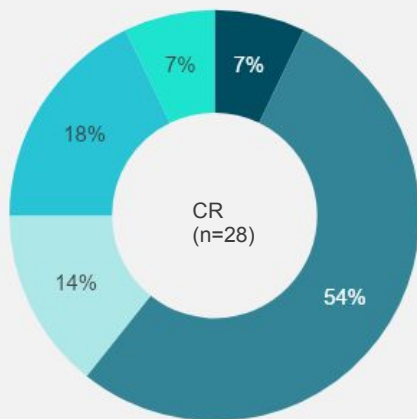


Responsibilities of Internal Coaches

For 75% of organizations, coaching is less than 51% of the IC's job responsibilities.

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

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

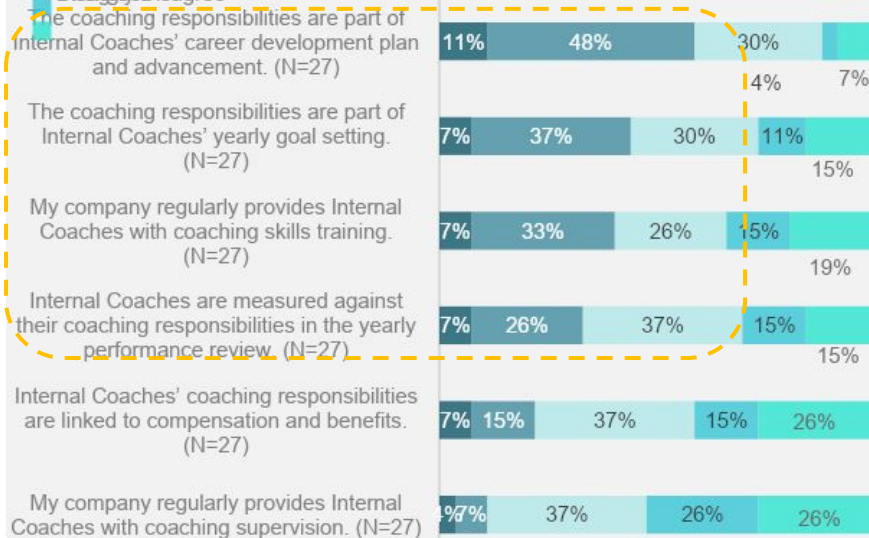


ICs have well-defined roles, however, coaching responsibilities are not directly linked with compensation and benefits.

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

Legend for survey responses:

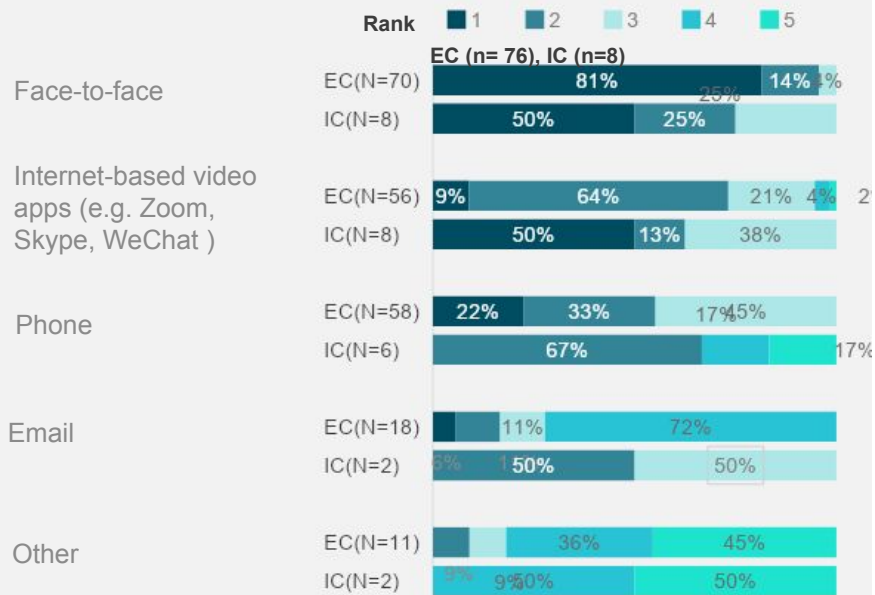
- Strongly Agree
- Agree
- Neither Agree Nor Disagree
- Disagree
- Strongly Disagree



Medium of Coaching Assignment Delivery

The medium of delivery most used by ECs is face-to-face meeting. Internet-based video apps are becoming a popular choice for both ECs and ICs.

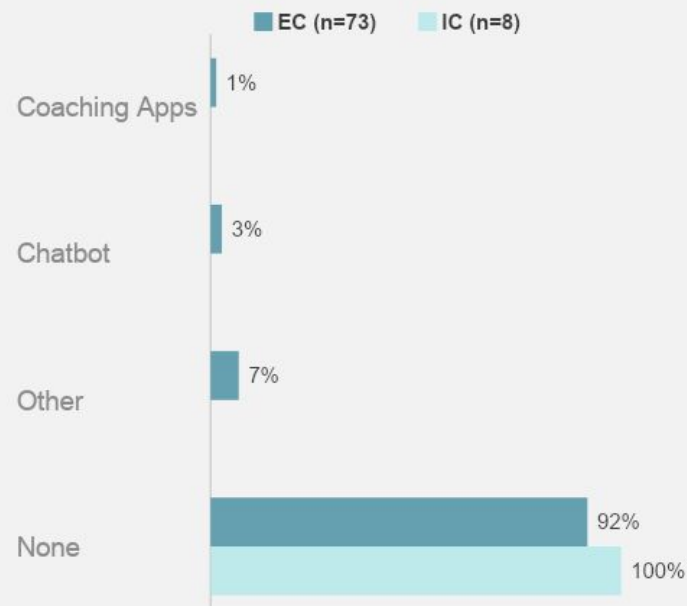
Q. Please select and rank the media used to deliver your coaching assignments? (Multiple choice)



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

Most coaches in HK are not using technology- or AI-based coaching tools. This is similar to overall market data.

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

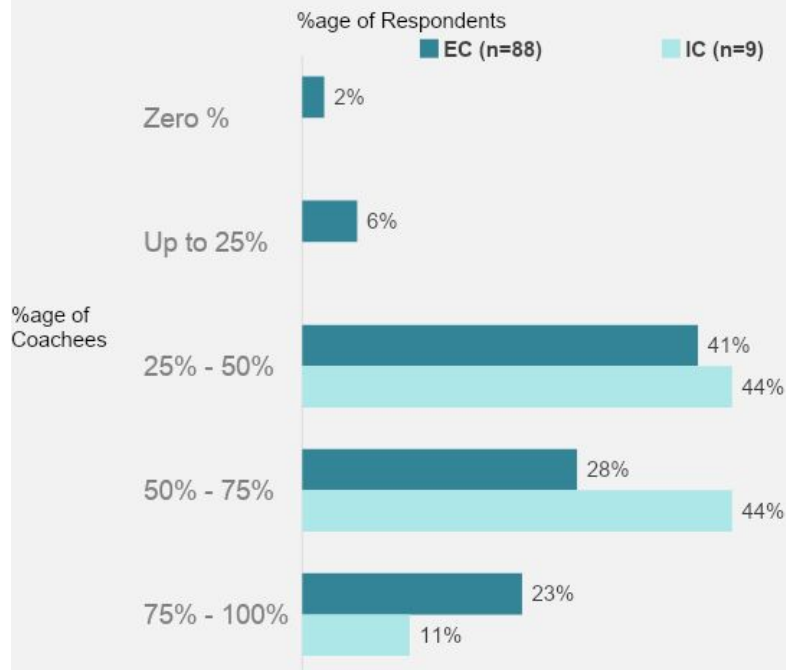


Something to ponder: Perhaps AI has not yet penetrated the coaching industry in Asia. It might be interesting to compare this trend with data in the west

Profile of Typical Coachee

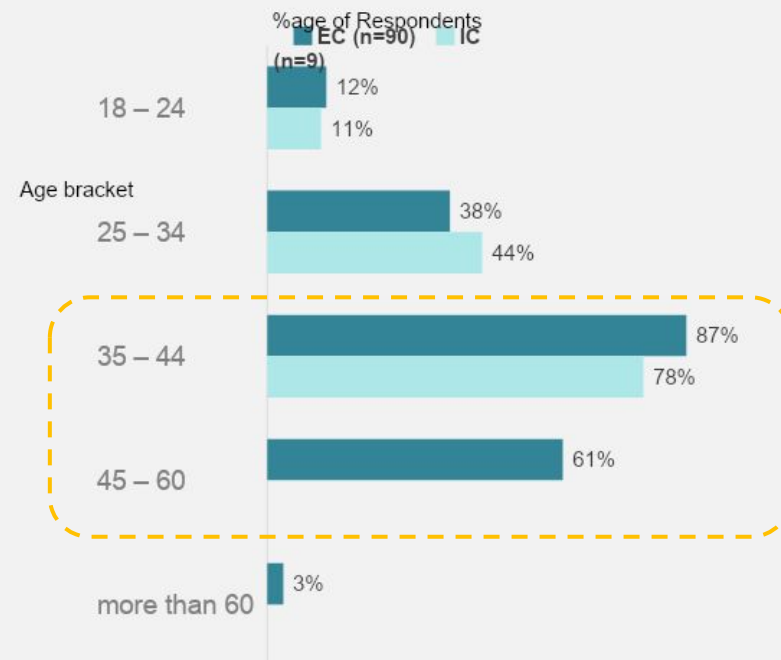
On an average 50% (median) of the coachees for ECs and 60% (median) for ICs are female. Also, the distribution vary for EC vs IC.

Q. Please indicate the percentage share of your female coachees



ECs have more coachees who are over 35 while ICs do not have coachees who are over 45. Both have coachees who are millennials.

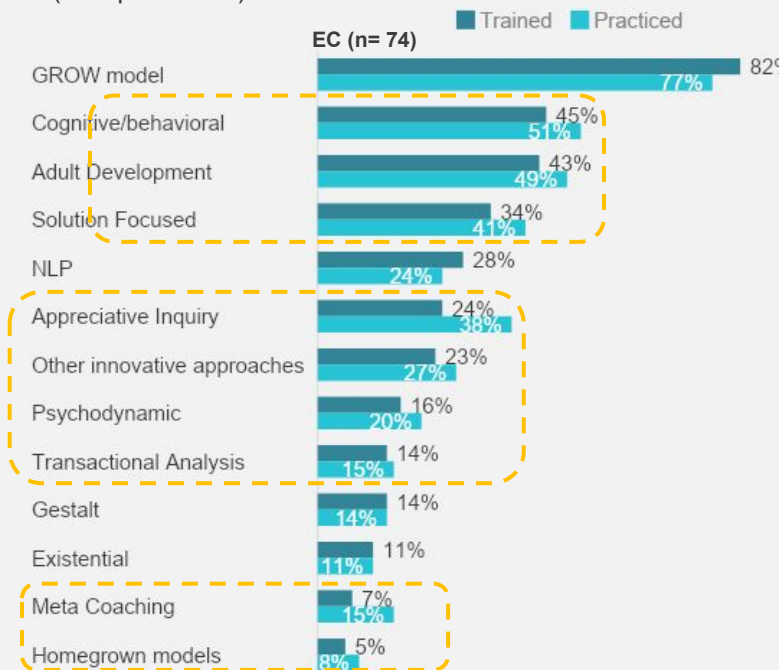
Q. Please indicate the age-range of your Coachees (in years).?(Multi Choice Questions)



Coaching Models – Trained vs Practiced

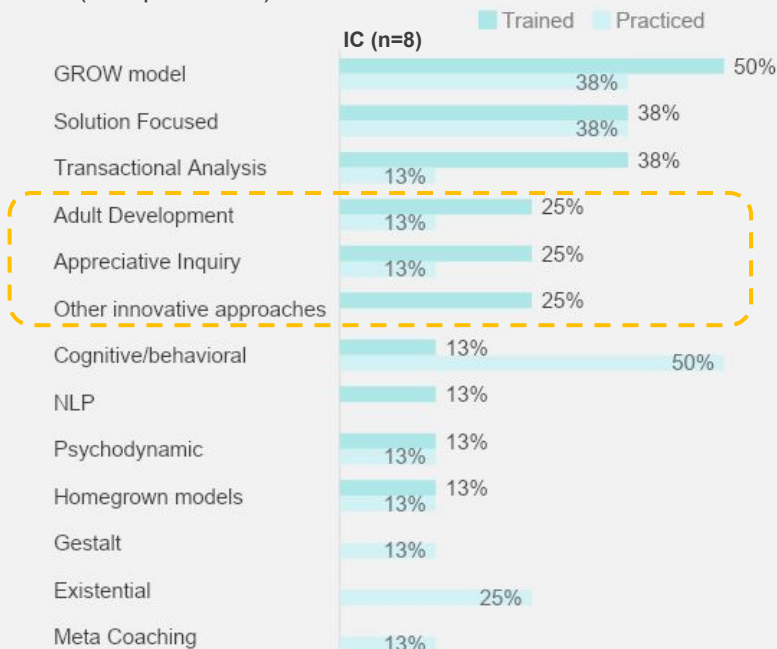
A small percentage of ECs are practising coaching models that they have not been trained on.

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)



Numbers of ICs too small to make a meaningful conclusion.

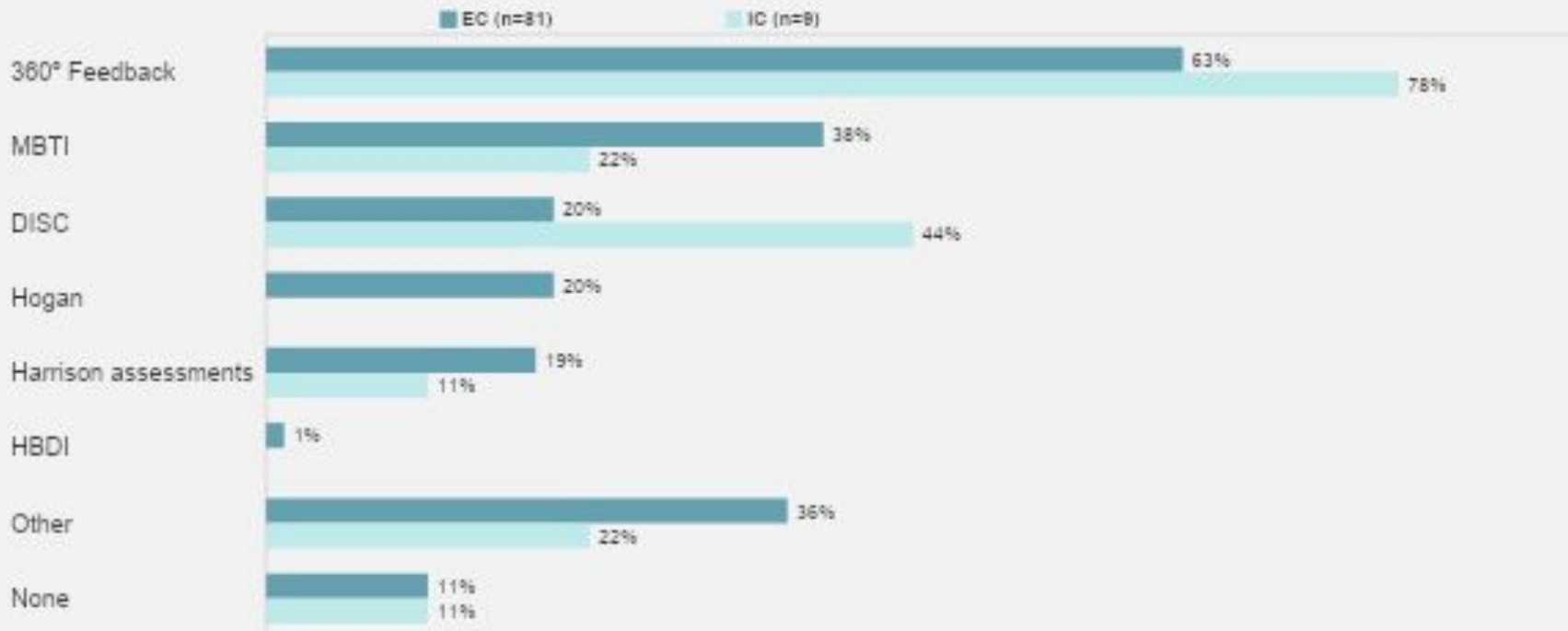
Q. Please share the models of coaching you have studied, formally trained or self-trained in and whether you use them in your coaching practice.? (Multiple choice)



Diagnostic Tools Used in Coaching

360° Feedback is the most widely used diagnostic tools

Q. Which diagnostic tools do you use in your coaching practice? (Multi-choice)



Coaching Beliefs and Philosophy

Understanding of Coaching

Coaching Definition is well understood by vast majority (98% agree with John Whitmore definition) . Companies also expect additional elements of guidance and experience sharing as part of coaching, although slightly less in HK than overall.

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

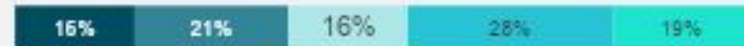
Unlocking a person's potential to maximize his/her own performance, based on the principle of asking, rather than telling.(N=42)



The process of assisting and guiding coachees to resolve personal, social, or psychological problems and difficulties.(N=43)



Providing guidance focused on strategic goals.(N=43)



Guidance

Sharing experiences and passing down knowledge to coachees to support them in their professional development.(N=42)



Knowledge Transfer

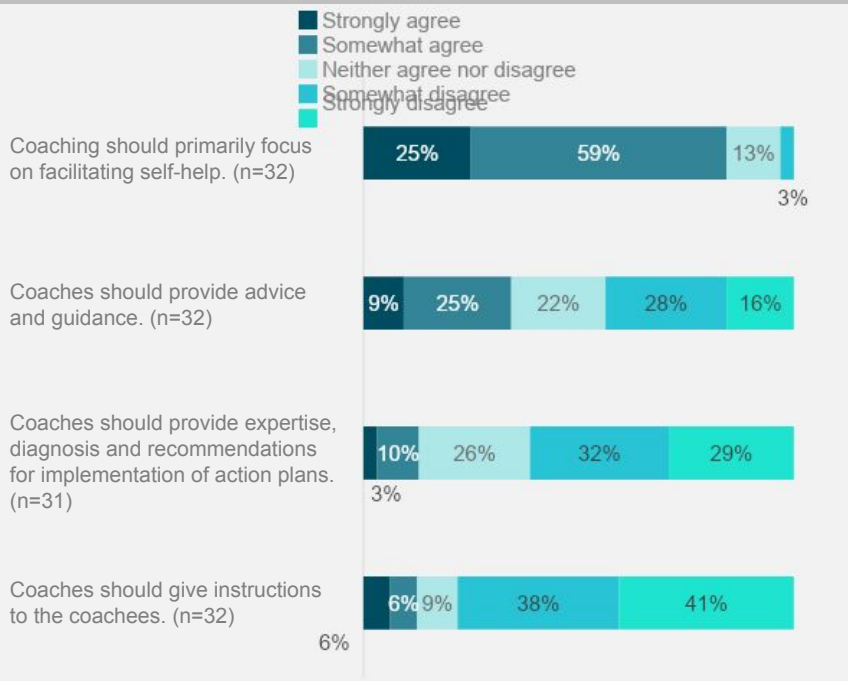
Providing expert knowledge such as providing information, solving coachee's problems, making diagnosis and recommendations for implementation, etc.(N=43)



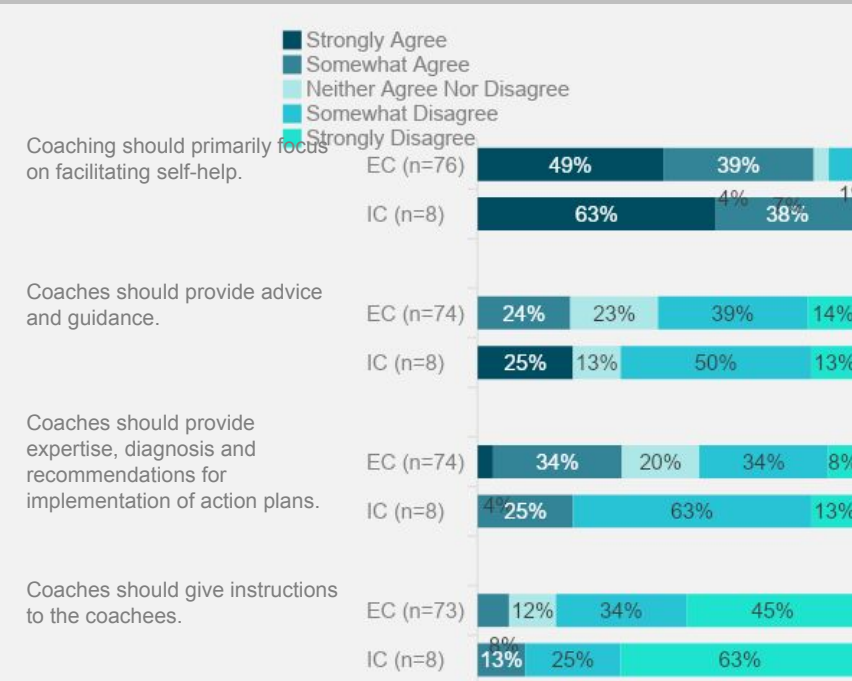
Understanding of Coaching

Both companies and coaches agree coaching focus is on facilitating self-help. They also acknowledge other elements in coaching, such as guidance, coming stronger from companies, although lower than overall. and instructions giving are relatively lower as compared to other markets.

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.

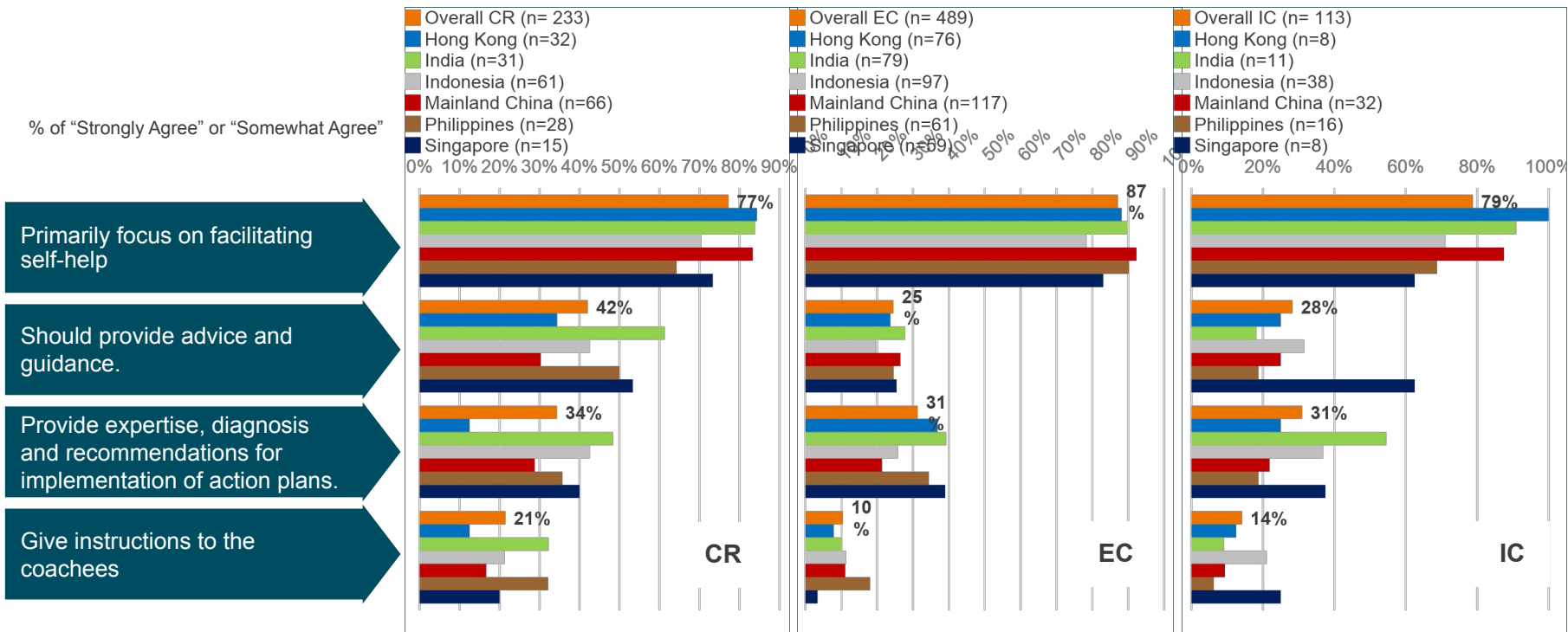


Something to ponder: What role may the cultural dimension of power distance play in the coaching relationship?
 How can we balance the value of coaching as a unique and impactful approach, while honoring the cultural values of Hong Kong?

Understanding of Coaching – By Market

Understanding of coaching in Hong Kong is rather aligned with other markets in the region. Companies (both CR and IC) see coaching more as self-help than guidance and recommendations than in other markets (see market reports for geography variations)

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

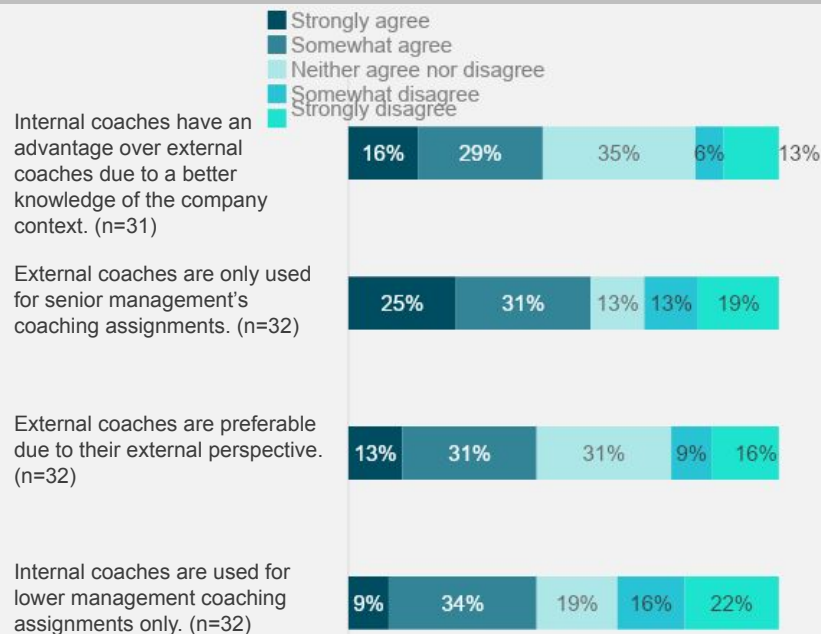


Beliefs About Internal and External Coaches

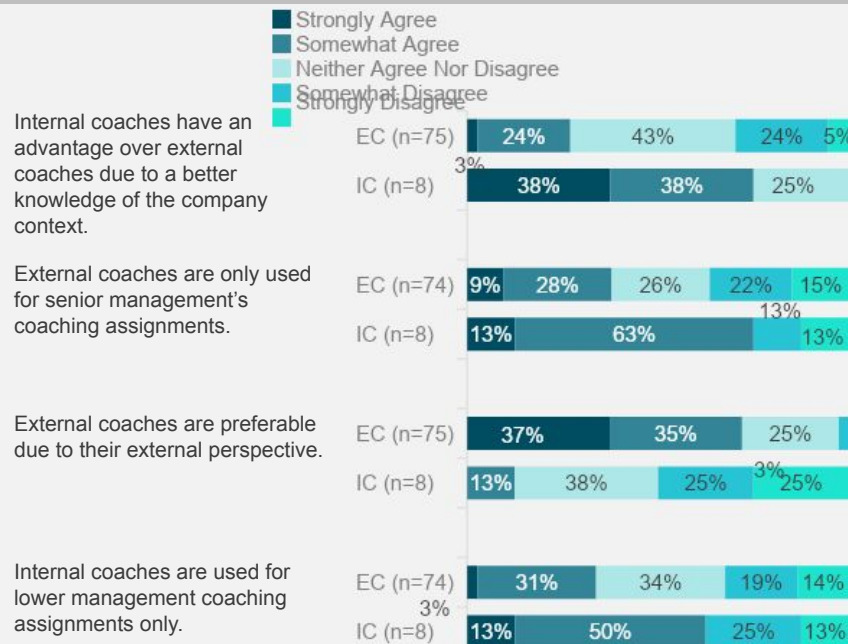
There are marked differences in how benefits of internal coaching vs. external are perceived. ICs see a strong advantage in knowing the context, while ECs value more their external perspective; companies have mixed views.

There is an agreement on the practice of using more ECs for senior management and ICs for lower management.

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. (EC & IC)

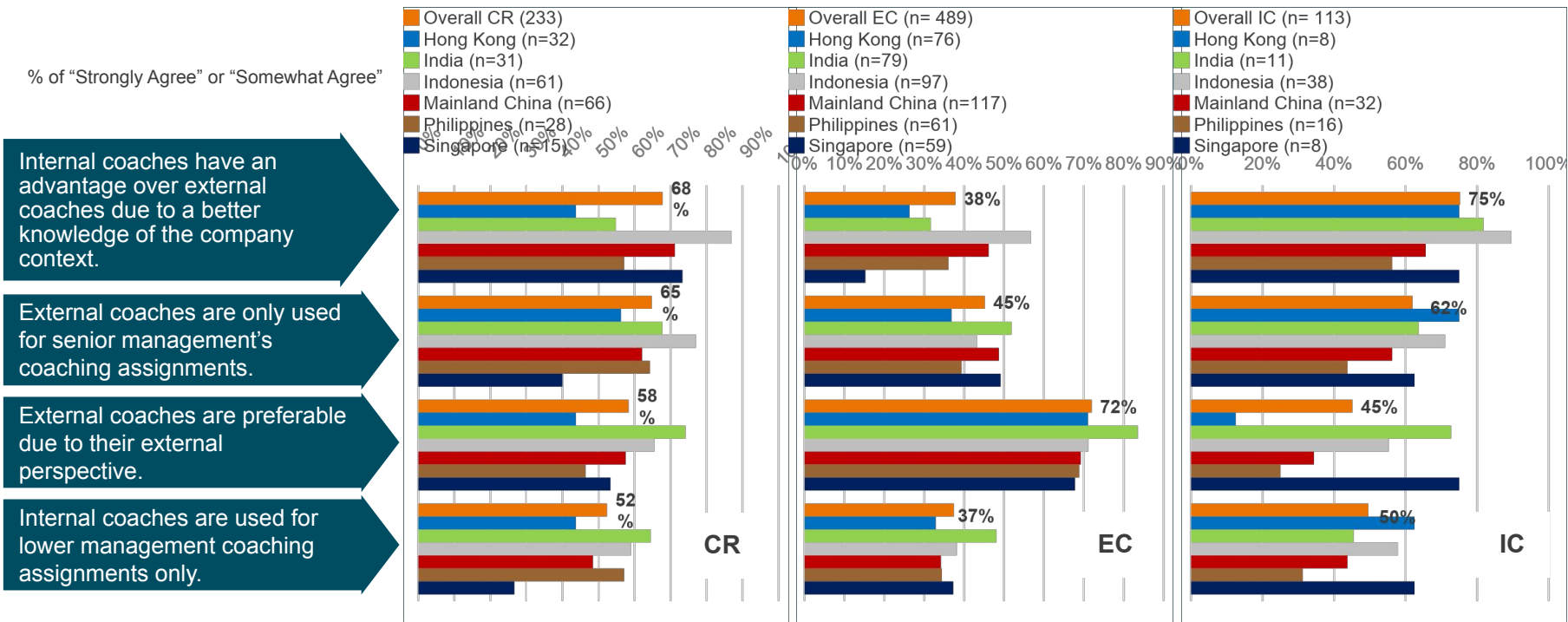


Something to ponder: Is knowledge of the company more an asset or more a barrier for coaches to bring new perspectives? How may neutrality of the coaches play a role in the benefits of coaching? How can companies balance between the benefits of neutrality and company knowledge?

Beliefs about Internal and External Coaches – By Market

Relative to other markets, HK CR and ICs agree less strongly that EC are preferable in bringing an external perspective. IC report a stronger tendency to use ECs for senior management and ICs for lower management. (more geographical nuances in market reports)

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



Expected Organizational Goals for coaching

Coaching is primarily used for employees' growth & for development of Leadership and High Potential development >80% , similar to other markets. Other focus areas tend to be behavioral (56%) and remedial (46%)

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

Strongly agree Somewhat agree Neither agree nor disagree Somewhat disagree Strongly disagree

Development needs

The use of coaching is dedicated to employees' growth and development. (N=40)



Coaching is an integral part of leadership or high potential development. (N=40)



Performance related

Coaching is used as a remedial action to 'fix' a specific performance gap or behavior. (N=40)



Coaching is mainly focused on interpersonal behavioral topics (e.g. communication, dealing with conflicts). (N=40)

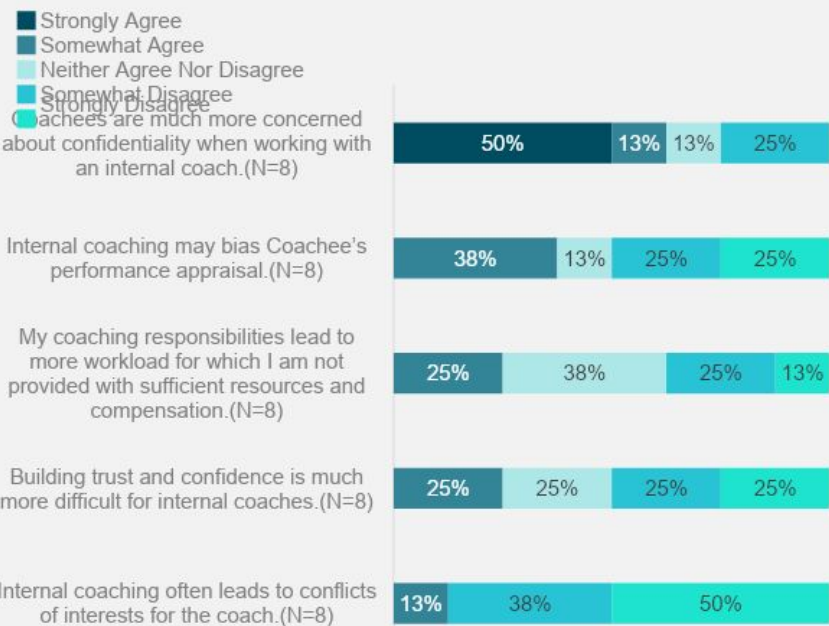


Something to ponder: With current markets and leadership evolving towards more ambiguity and uncertainty, how can coaching serve leaders even more proactively, to support their new development needs and help them prepare for the future of work?

Opinion of Internal Coaches - Dynamics

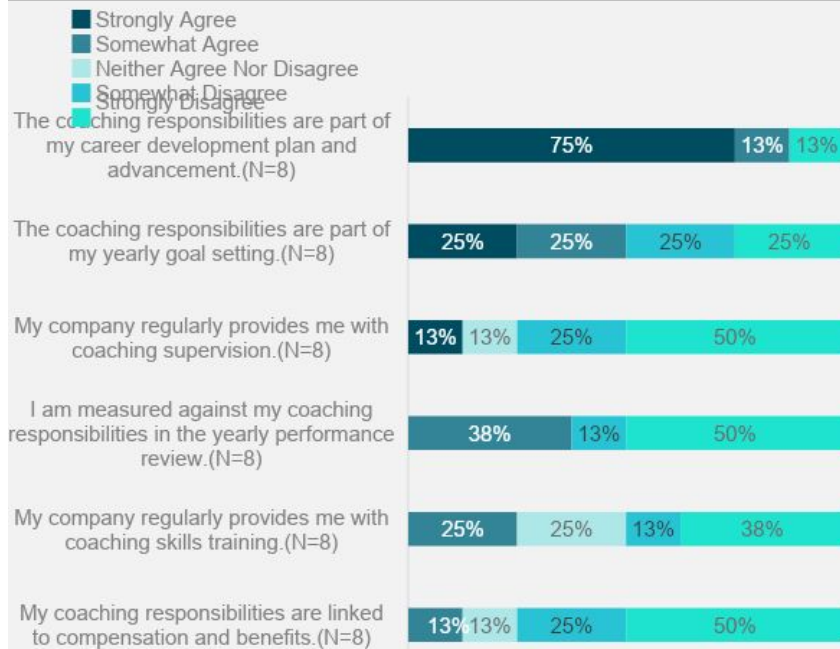
63% ICs tend to agree that confidentiality may be seen as a concern for coaches. 88% disagree that trust and bias are an issue and that internal coaching would often lead to conflict of interest.

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



While 88% ICs agree that coaching is part of their job & development, 75% feel it is not linked to compensation and 63% not linked to performance review.

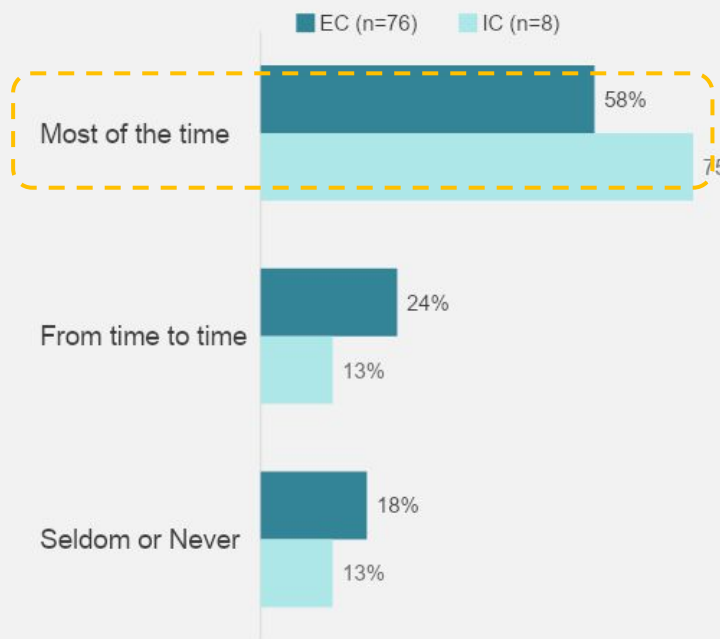
Q. Please indicate the extent to which you agree with the following statements? (Internal Coaches)



Ethical Dilemmas Faced While Coaching

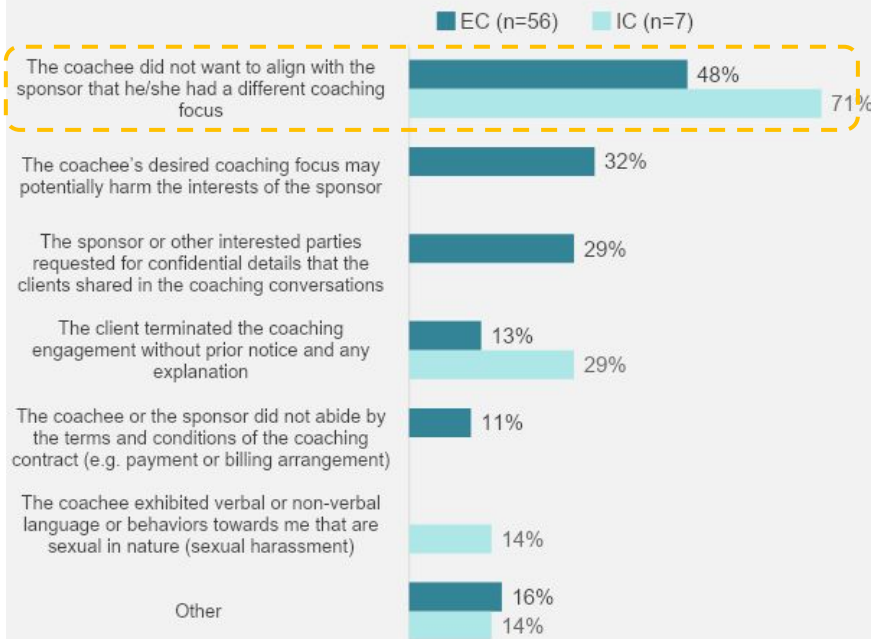
Most of the ECs & ICs share ethical code with coaches. Less EC in HK than in other markets overall (58% vs.77%)

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



Highest ethical dilemma is around misalignment in coaching focus of Coachee vs Sponsor, especially for ICs in HK (71% vs 52 overall)

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



Difficult Situations Experienced While Coaching

55% of ECs have recommended a coachee for mental health professional, which may be related to a lack of awareness of mental health from clients or a better awareness of boundaries for coaches.

Many coaches have accepted a low reward for their service especially ICs 60%

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

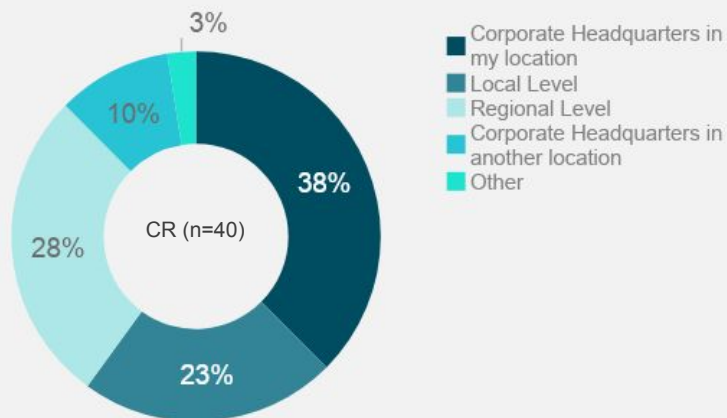


Coaches' Selections and Credentials

Setting up Coaching Assignments

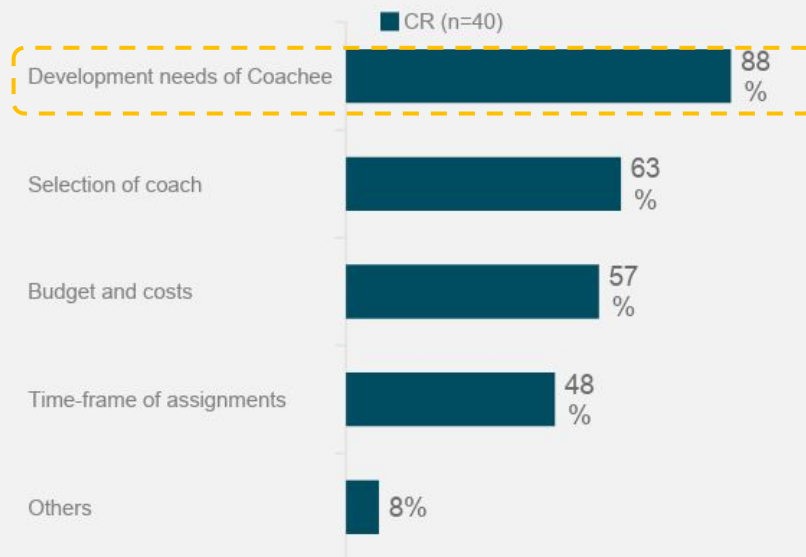
Almost half of the decisions are made either at HQ in Coaches' Location or at Local Level while a quarter at regional level

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



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

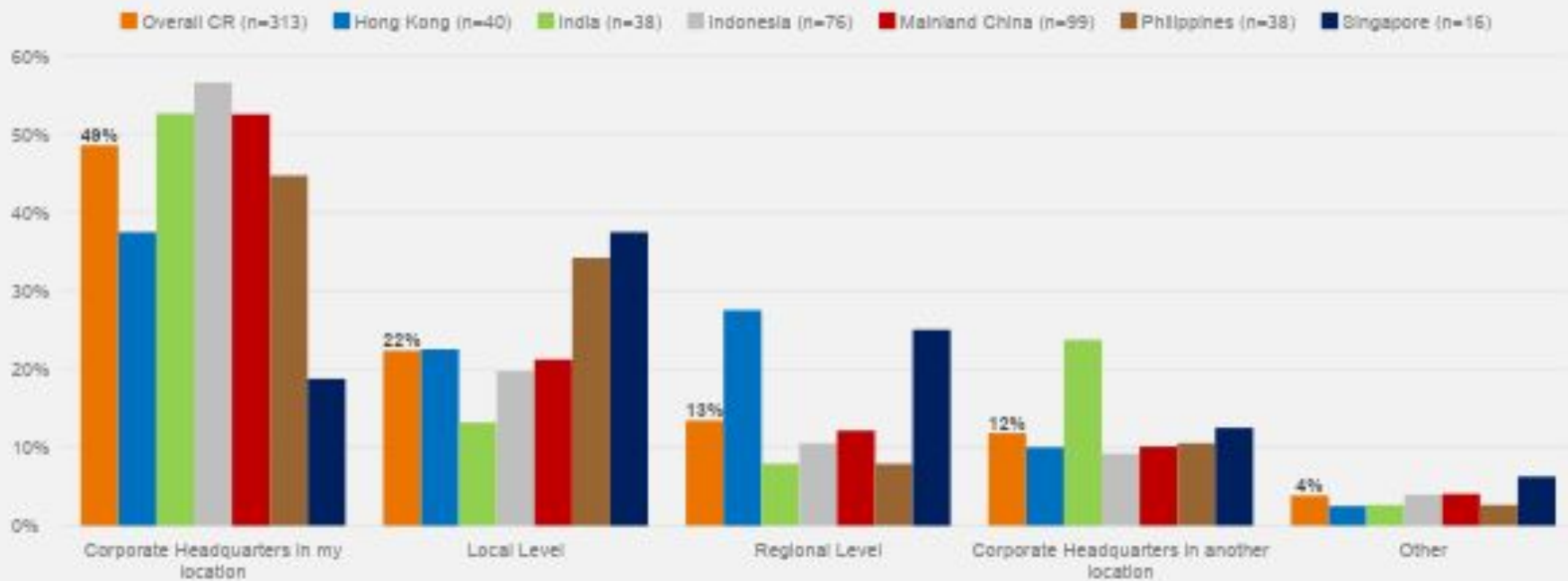
Q. Please indicate the areas that are considered when setting up coaching assignments. (Multiple Choice)



Setting up Coaching Assignments – By Market

HK's decisions are made, relative to other markets, lesser at the corporate level and more at the regional level.

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

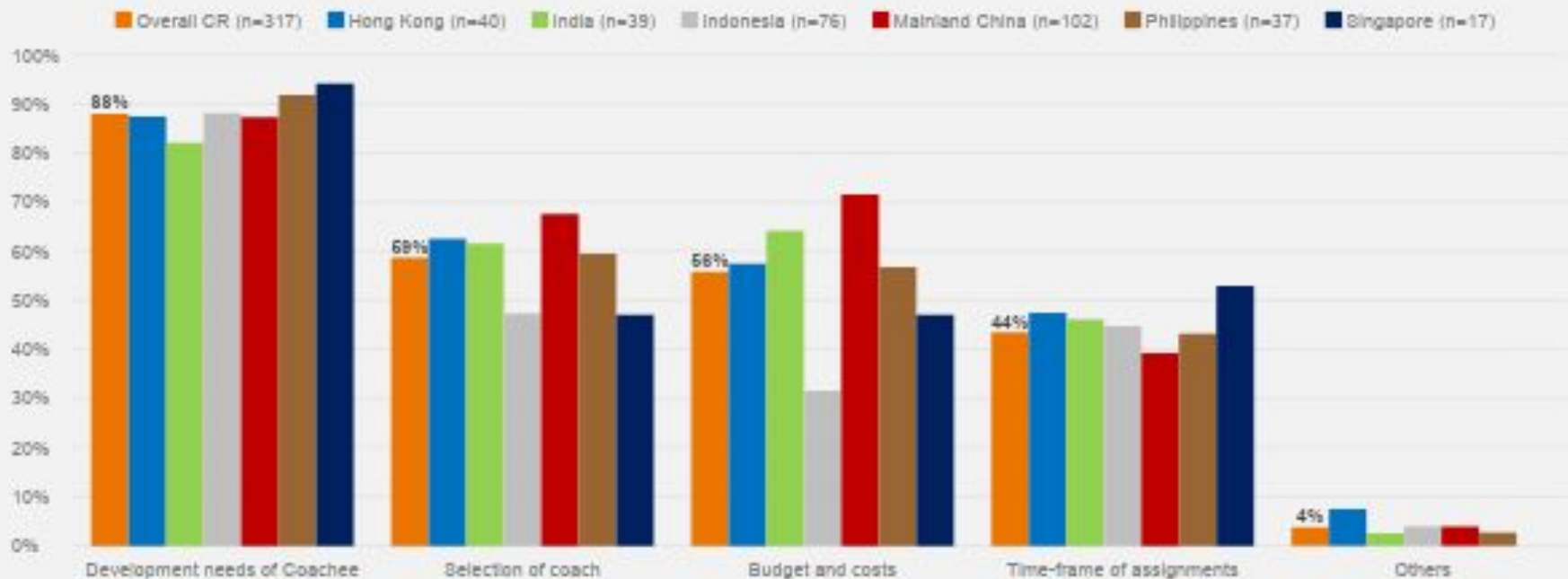


In the 2017 Survey, similar observation where Corporate headquarters were mainly responsible for setting up the coaching process

Setting Up Coaching Assignments – By Market

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

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

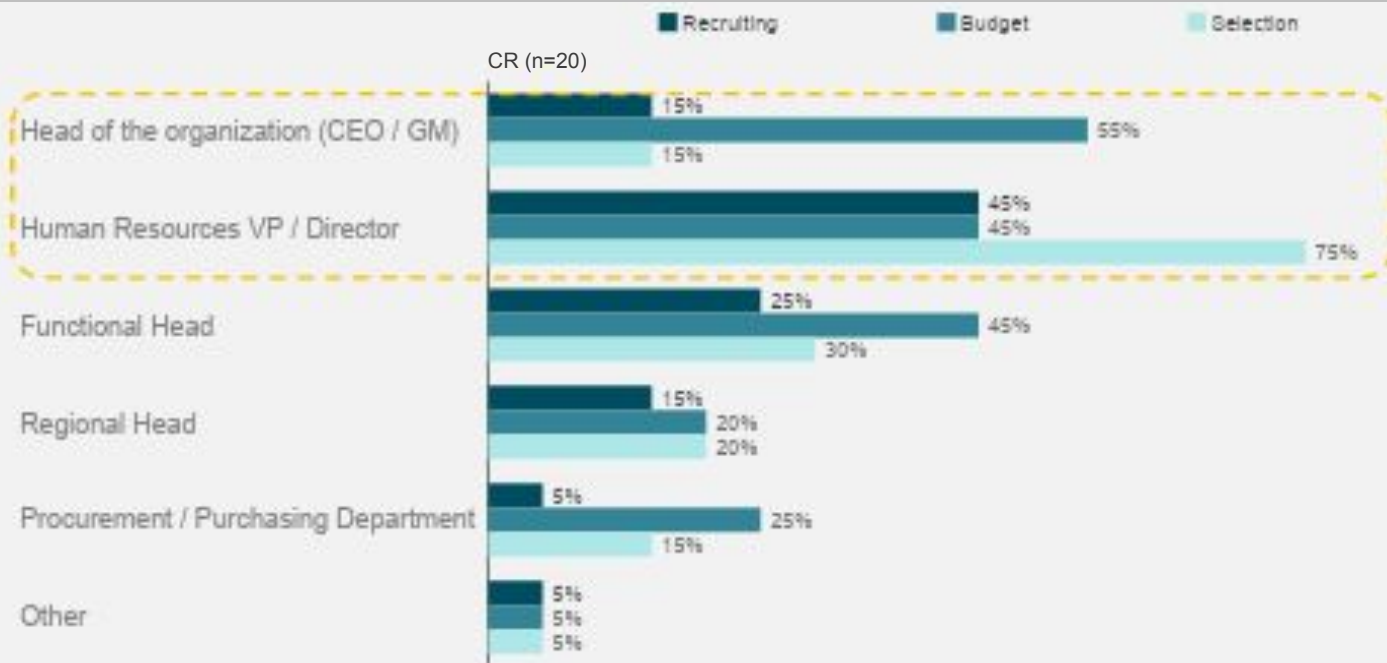


In the 2017 Survey, "Time-frame of assignments" and "Selection of Coach" were the two most important factors respectively.

Decision Makers For Coach Recruitment

Majority of HK CEO/GMs are primarily involved in budgeting decisions and less in recruitment and selection compared to other markets (HK15% for both vs 33% and 44% overall). HK HR heads are more involved in selection decisions (HK75% vs 59% overall).

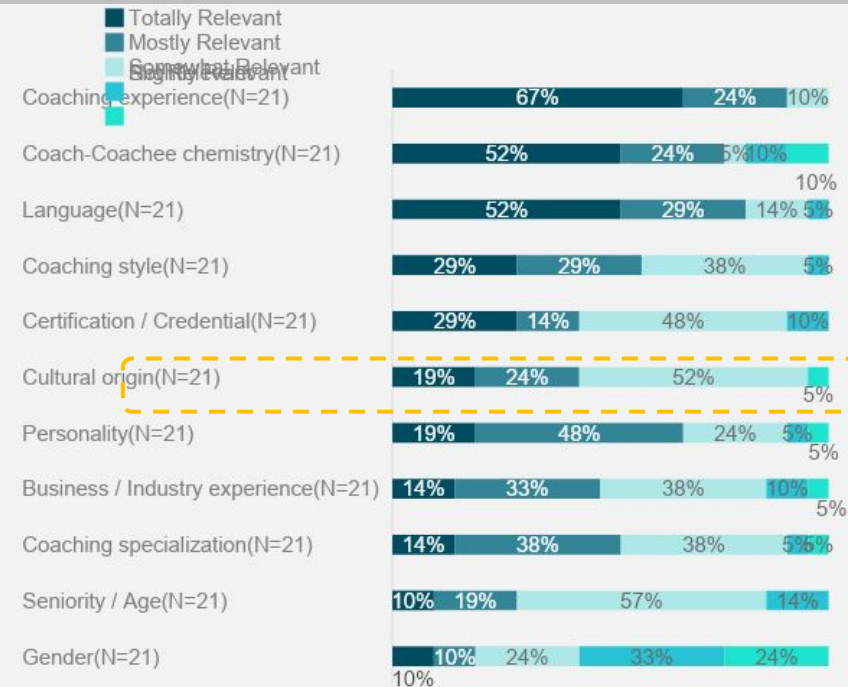
Q. Who is involved in the external coaches' recruitment process? (Multiple Choice)



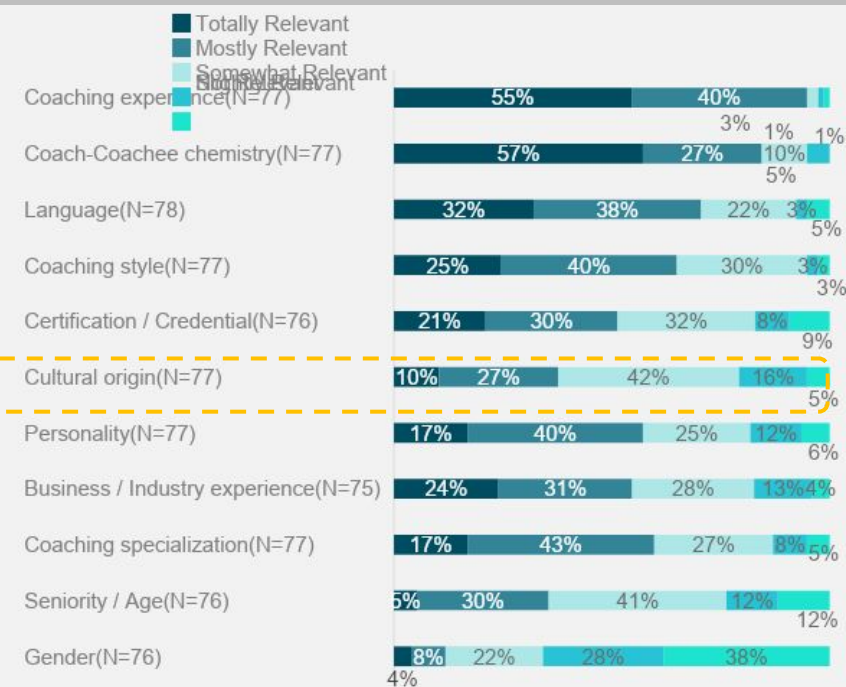
Criteria for Hiring & Selecting External Coaches

Companies and EC are aligned on the criteria for selection of external coaches. Other than Gender, all criteria are important. Top 4 are Coaching Experience, Chemistry, Language (similar to overall) and Coaching Style (#4 in HK vs #6 overall before credential and business experience). Companies put a higher relevance to the "Cultural Origin" criteria compared to ECs.

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



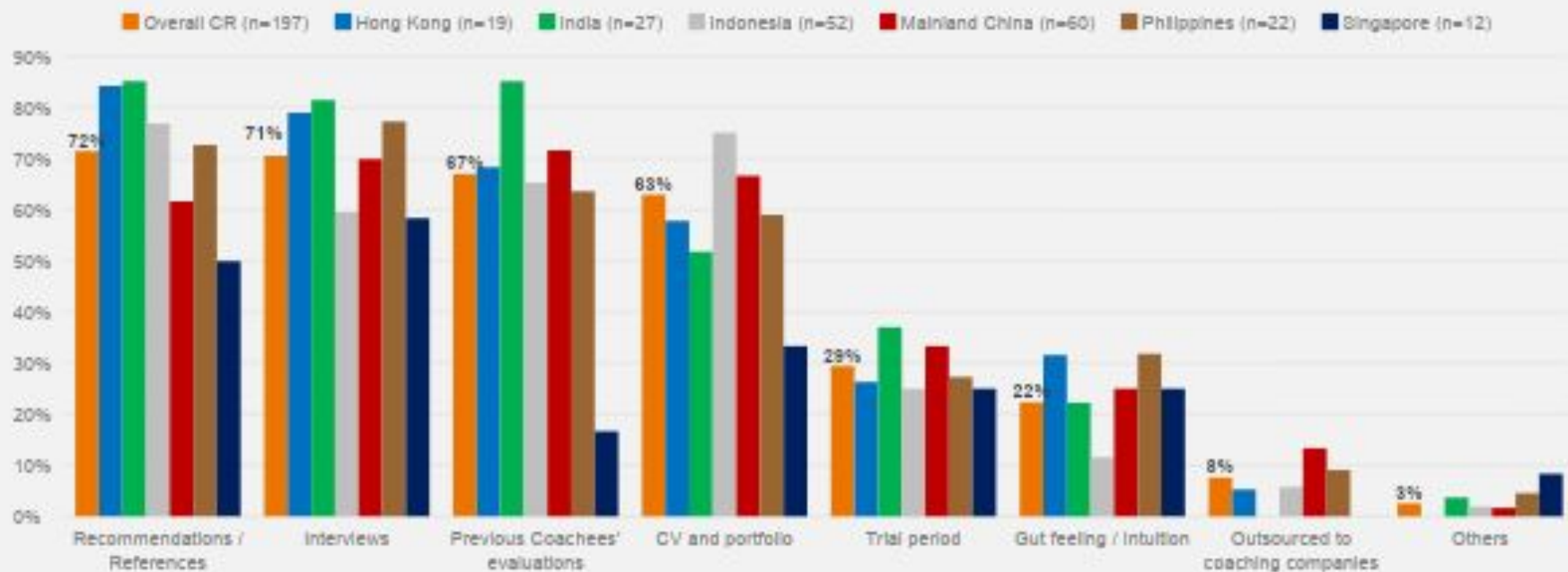
Q. How relevant are these criteria to companies when selecting external coaches? (External Coaches)



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)

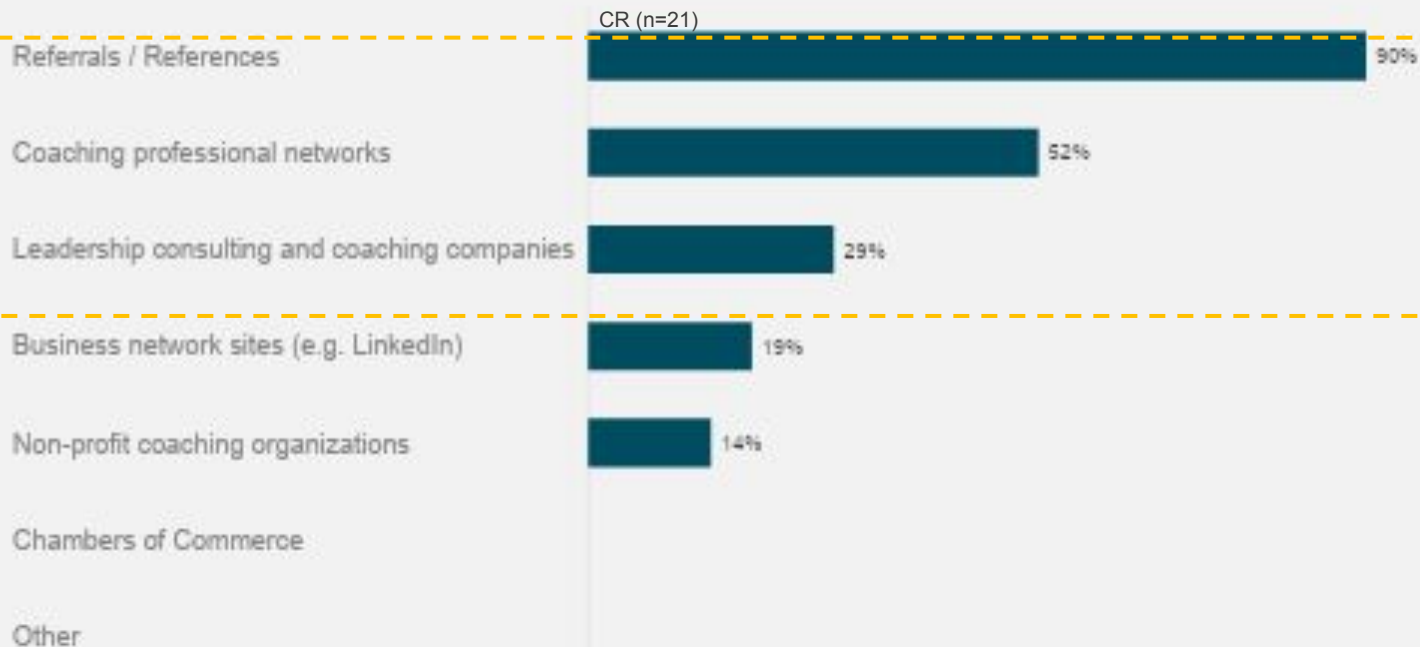


In the 2017 Survey, organizations brought out interviews, coaches' CV and portfolio and the feedback from coachees as main tools for assessing EC.

Channels for Hiring External Coaches

Referrals (HK 90% vs 73% overall) and Networks (HK 52% vs 54% overall) are leading channels for recruitment of coaches. Coaching Companies (HK 29% vs 49% overall) are less used compared to overall market.

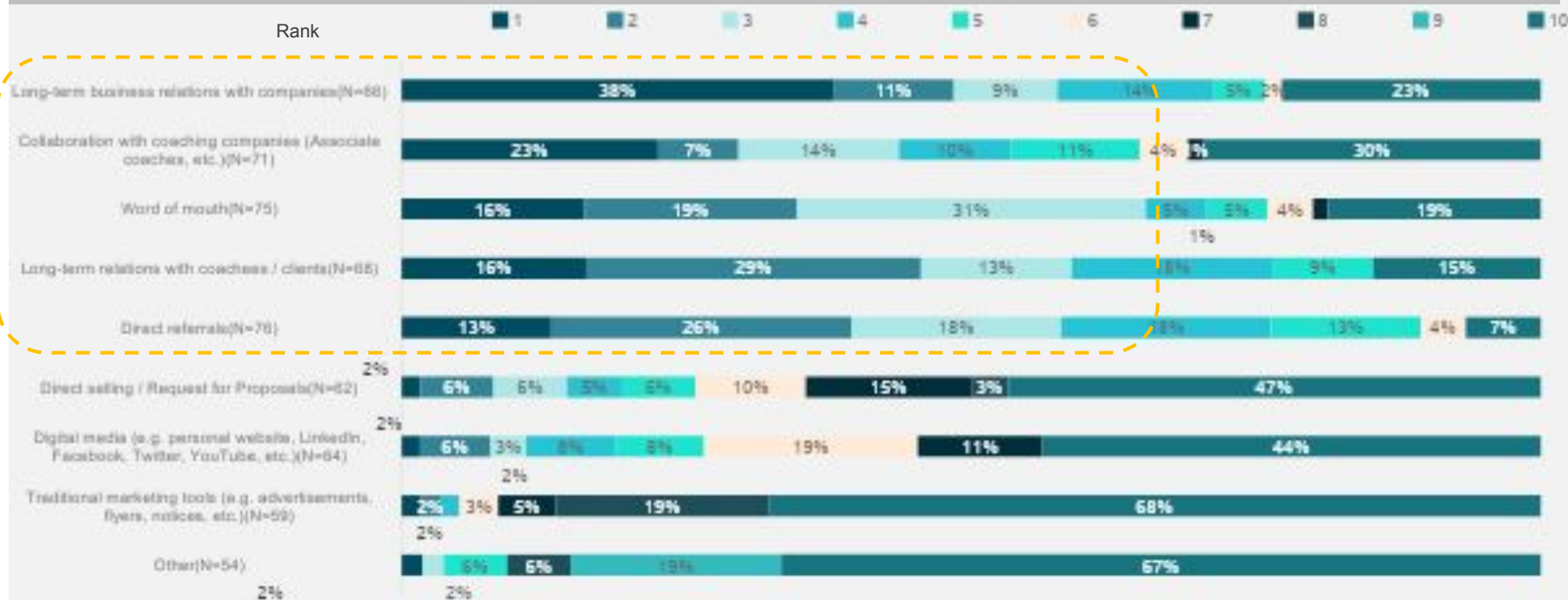
Q. Which channels do you use to recruit external coaches? (CR, Multiple Choice) .



Channels for Hiring External Coaches

Top five channels include Relationships with Clients & Coachees, Collaboration with Coaching organizations, Word-of-mouth, and Direct Referrals

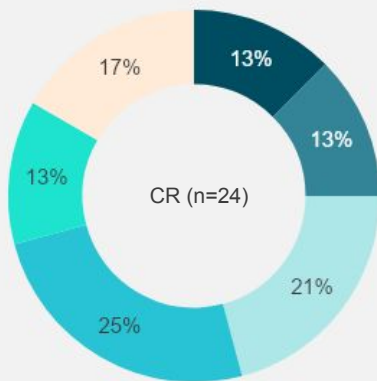
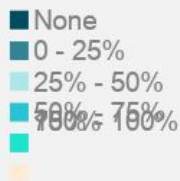
Q. Please select and rank the channels by which you won your coaching assignments in 2017-2018? (External Coaches)



Local Pool and Cultural Origin of Coaches

Opportunity 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?



More than 50% organizations are using coaches from the local pool, however a significant number of organizations are employing coaches from other markets as well

Q. Please rank the cultural origins of your external coaches



Cultural Origins of ECs

Organizations prefer coaches from the same cultural origin, followed by Singapore, Europe and Mainland China

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 (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%

Origin of Organizations

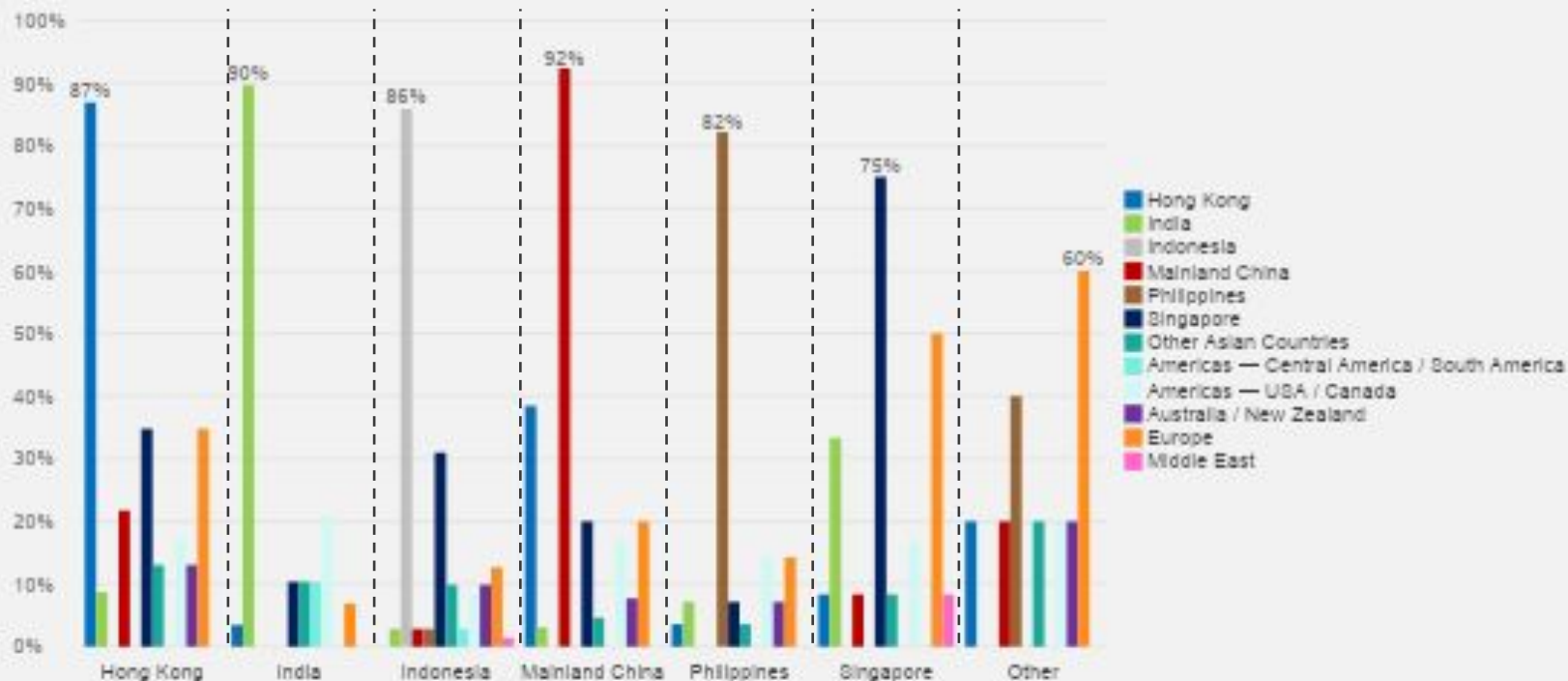
2nd
Highest
selection

3rd
Highest
selection

Cultural Origins of ECs

Local pool of Coaches is the most popular in all Markets

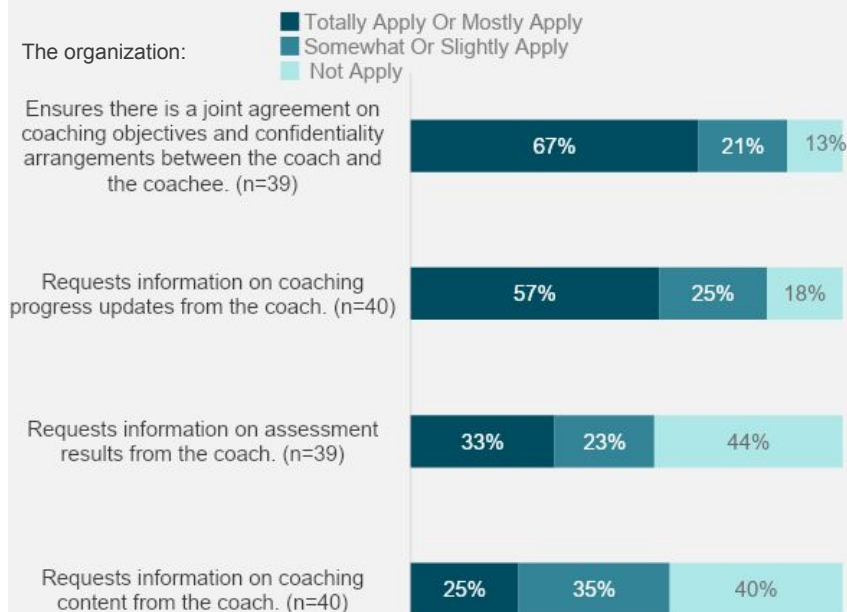
Q. Please select the top three cultural origins of your external coaches.



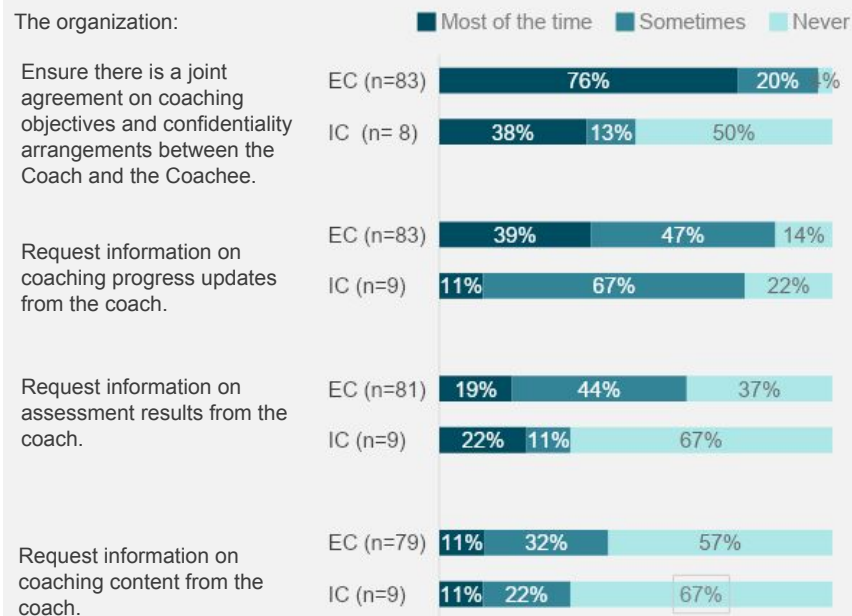
Coaching Process Setup

Majority of companies and coaches indicated that coaching objectives, confidentiality arrangements and requests for coaching progress updates are in place. However, about half indicated that info on assessment results and coaching content are requested from coaches

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



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



Something to ponder: Hong Kong market data shows a smaller percentage of requests made on both assessment results and coaching content compared to overall market data

Process Compliance by Organizations

In HK the signing of coaching contracts is consistent with overall while relatively lower compliance on the code of ethics (HK37%vs59% overall) and checking of certification/references (HK19% vs 31% overall).

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

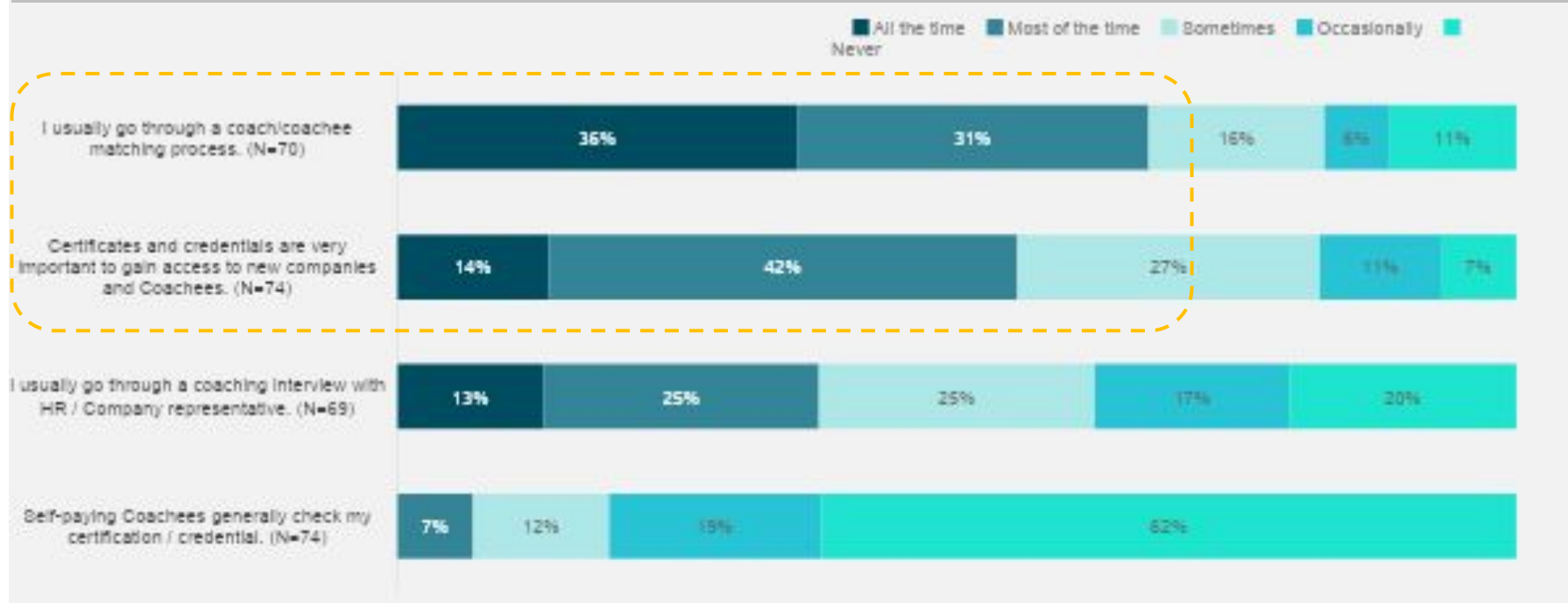


Something to ponder: Could the lower compliance on code of ethics reflect a stronger trust of coaches or a lower awareness of the code of ethics?

Coaching Process Practices

**Most go through a coach/coachee matching process.
External coaches in HK perceive certificates and credentials as more important than companies and self paid individuals.**

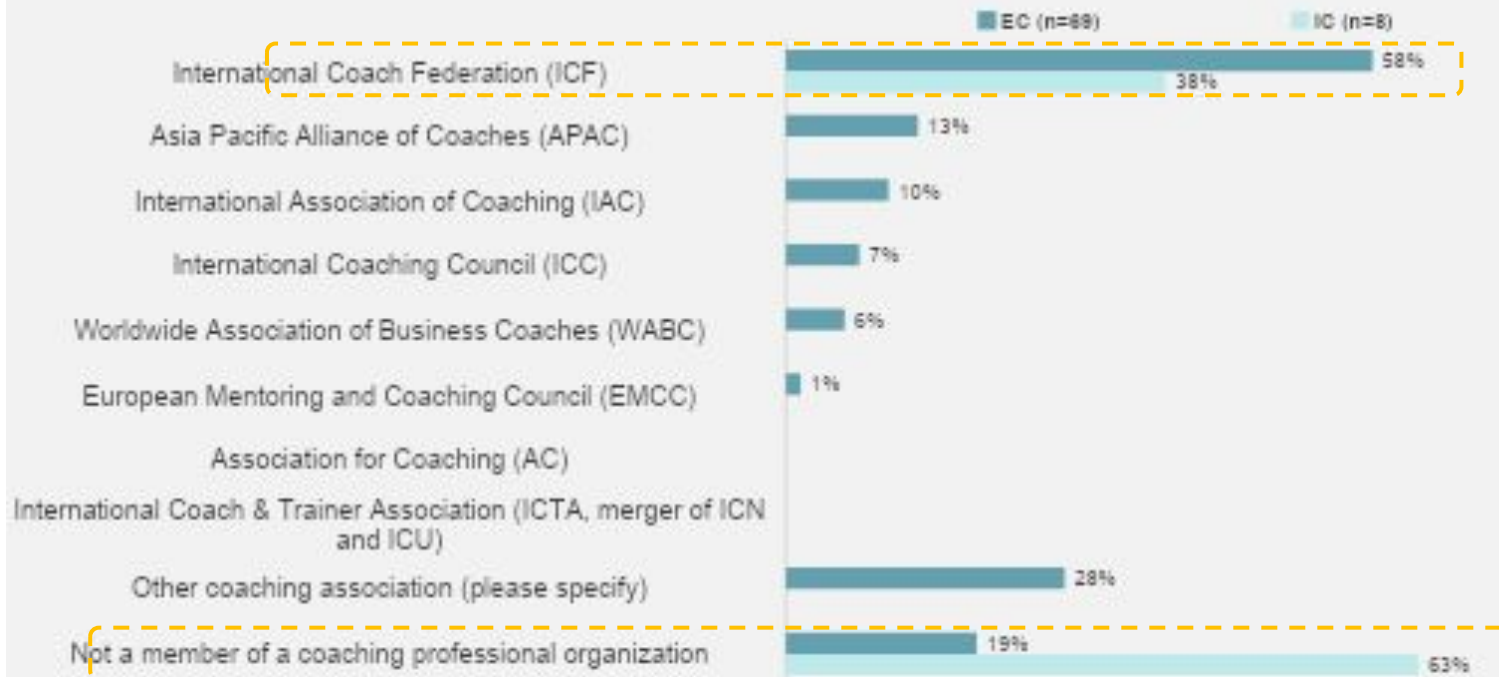
Q. Please indicate the extent to which the following statements hold true? (Answers from EC)



Membership of Coaching Association

Majority of ECs are members of ICF followed by other local coaching associations
19% (23% overall) ECS and 63% (50% overall) of ICs are not members of a coaching professional organisation

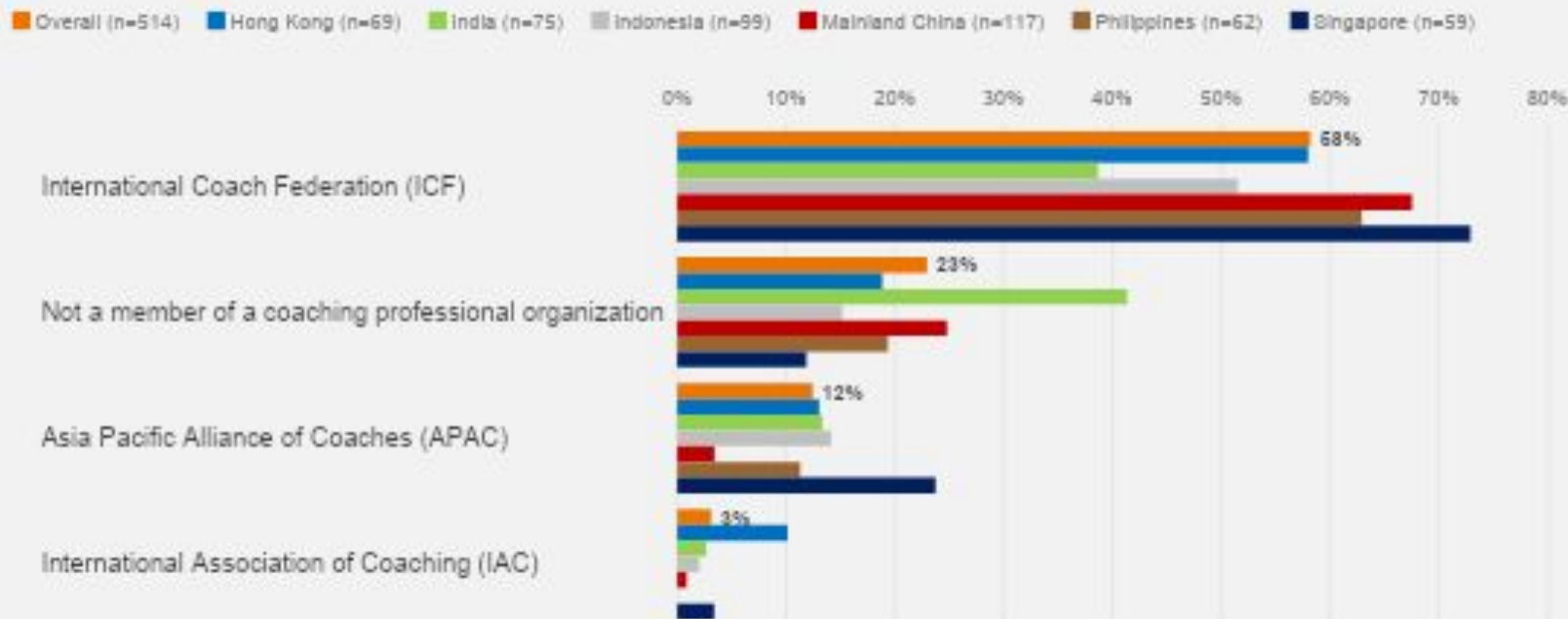
Q. Are you a member of any of the following coaching associations? (Multiple Choice)



Membership of Coaching Associations – By market

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

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

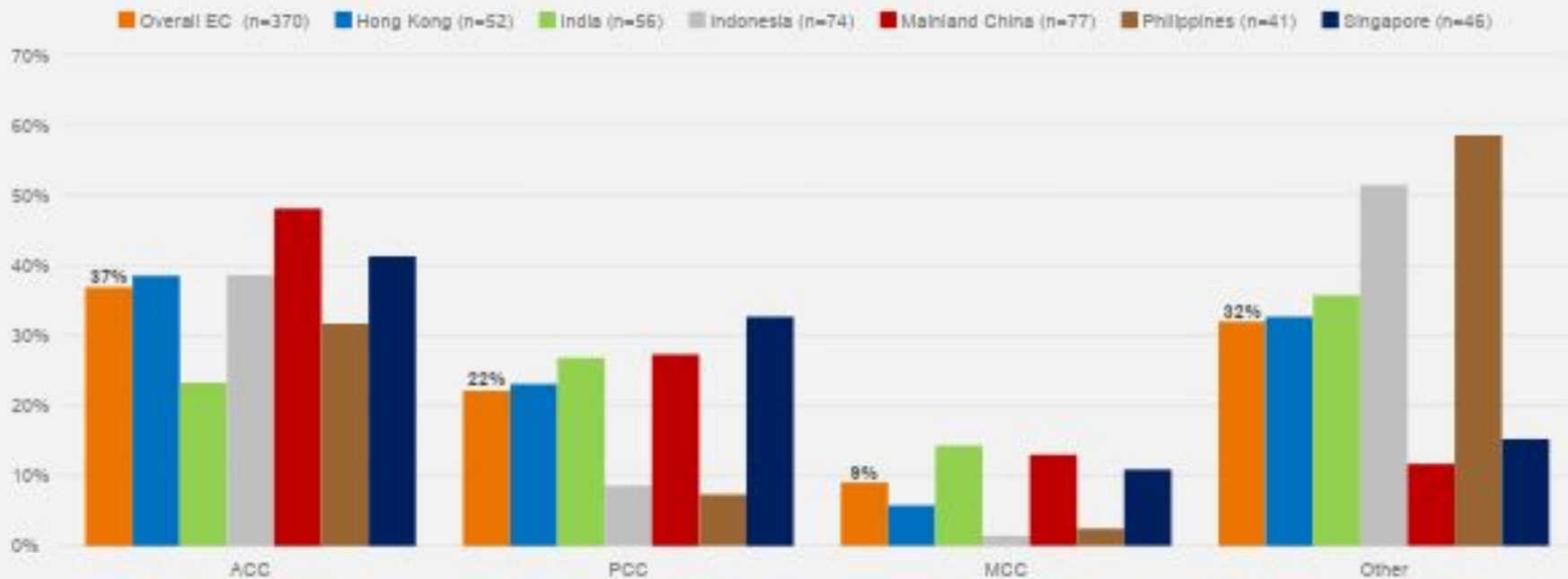


In the 2017 Survey, ICF was the leading professional coaching association with 53%, followed by APAC with 16%. 32% were not part of any coaching professional organizations.

EC Credential Levels

HK has similar credential levels as overall average

Q. What is your credential level?

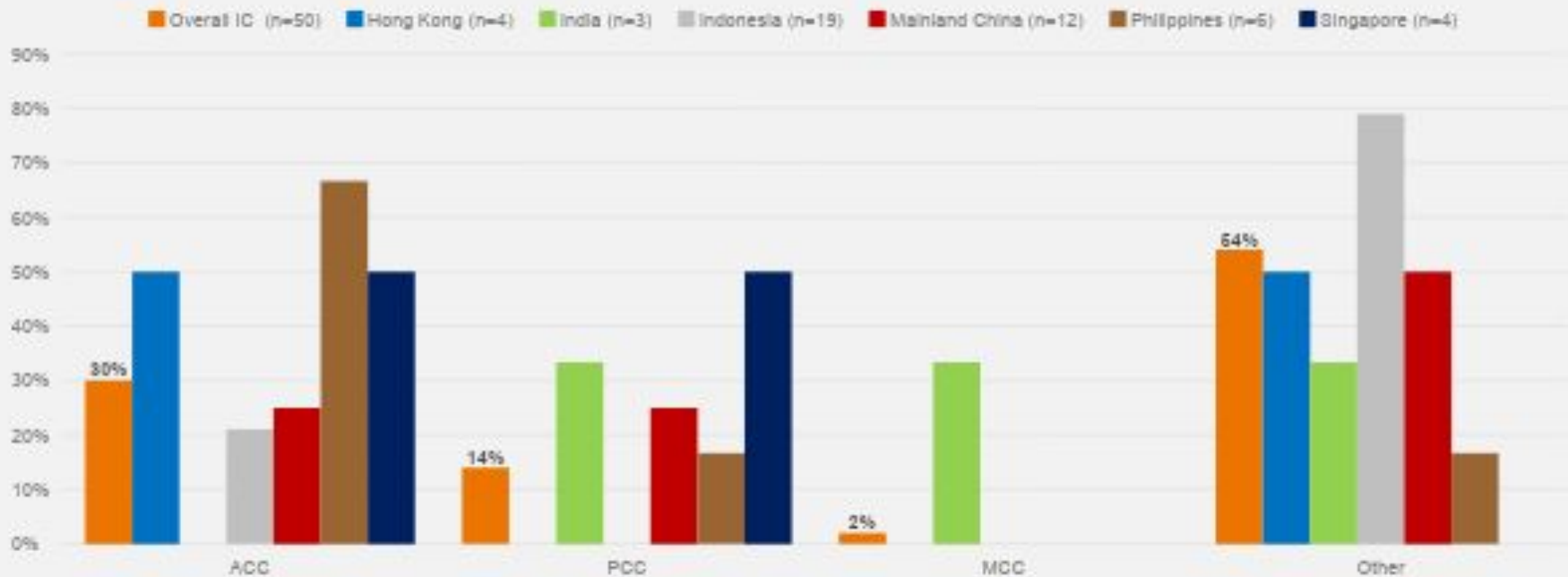


In the 2017 Survey, about 50% of coaches in India and China are accredited at PCC level while the majority of accredited coaches in HK have ACC credentials.

IC Credential Levels

ICs in general obtained a lower credential level compared to ECs

Q. What is your credential level?

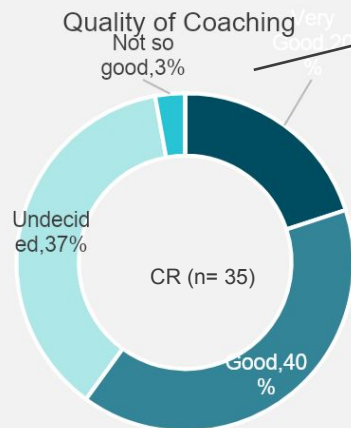


Coaching Evaluation and Diagnosis

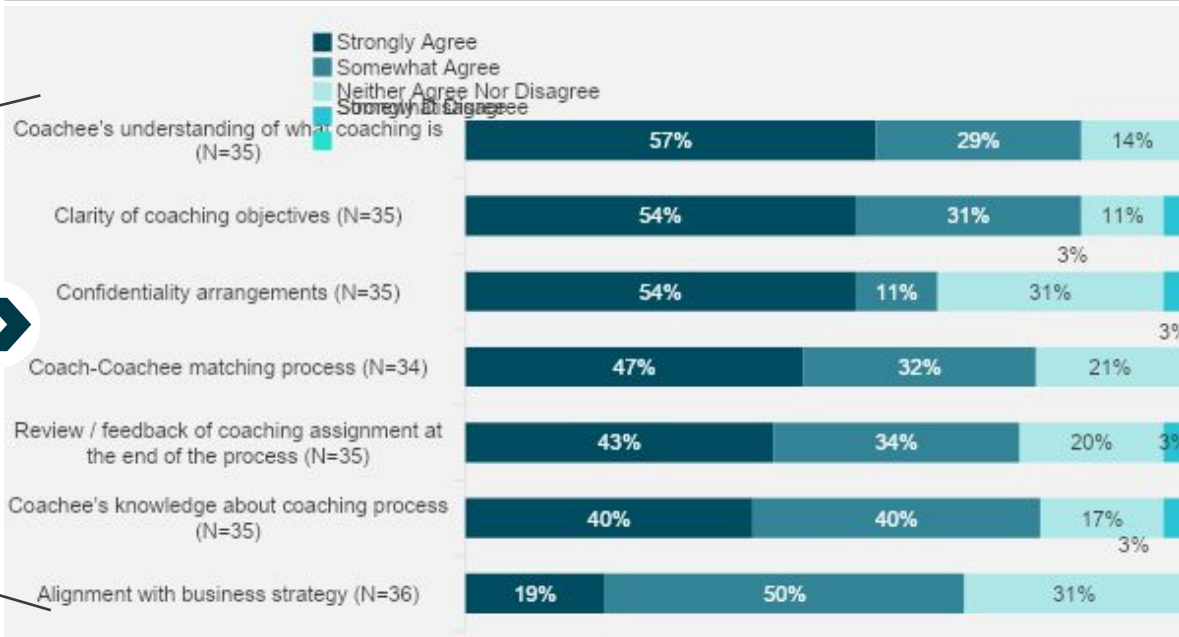
Evaluation of Coaching Quality

60% of participating companies rated coaching quality as good/very good. This is consistent with the overall market data (61%). 37% of organizations are undecided on the quality of Coaching. This is relatively higher than the overall market percentage (32%).

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



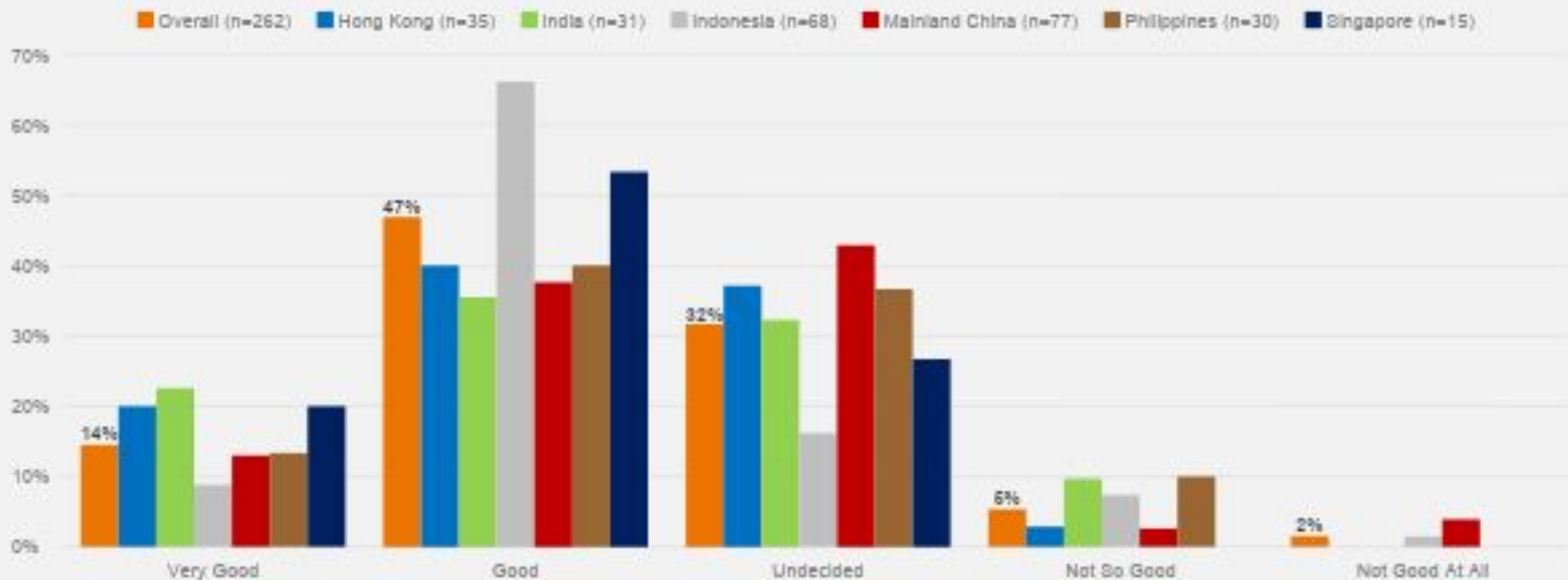
Q. What could be improved to make the coaching process even more effective?



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?

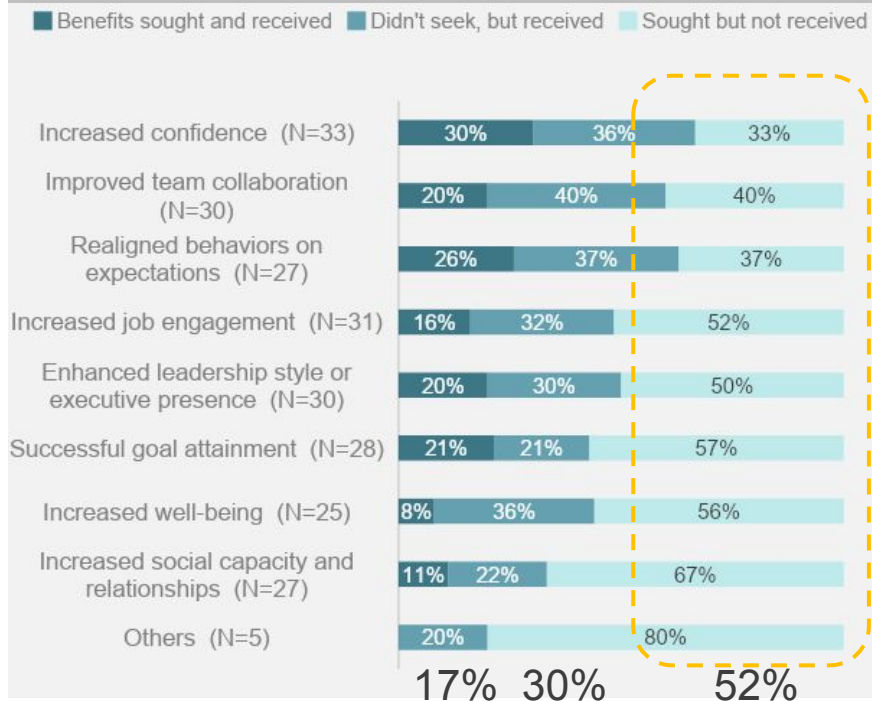


In the 2017 Survey, a similar pattern was observed. 83% in India, 66% in China and 54% in HK rated services 'good'.

Coaching Benefits – Expectations vs Delivery

Significant divergence between understanding of Companies vs Coaches in benefits achievements from coaching services. On average, 17% (20% overall) received the coaching benefits they sought while 52% (40% overall) companies have not received benefits sought. And 30% (40% overall) received benefits they didn't seek.

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? (Multiple Choice)

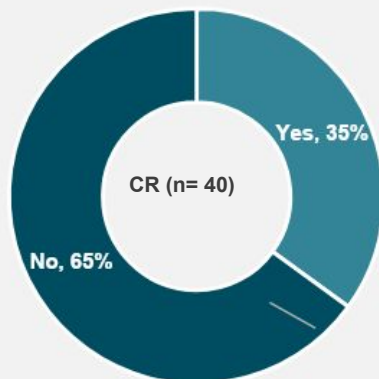


Something to ponder: What could be leading to the discrepancy of benefits sought and received? How do we close this gap and increase the perceived quality of coaching services?

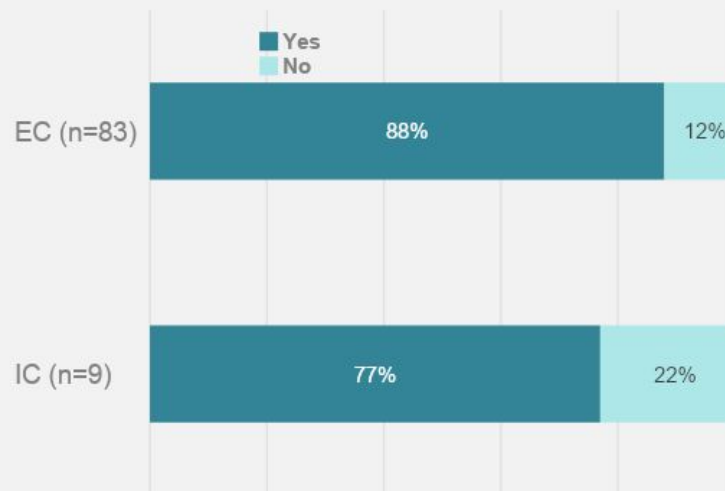
Usage of Evaluation Tools To Measure Success of Coaching

There is a marked difference in the level of usage of evaluation tools by Companies vs Coaches. Fewer Companies in HK reported that they use evaluation tool to measure the success of coaching (35% in HK vs 47% overall).

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)



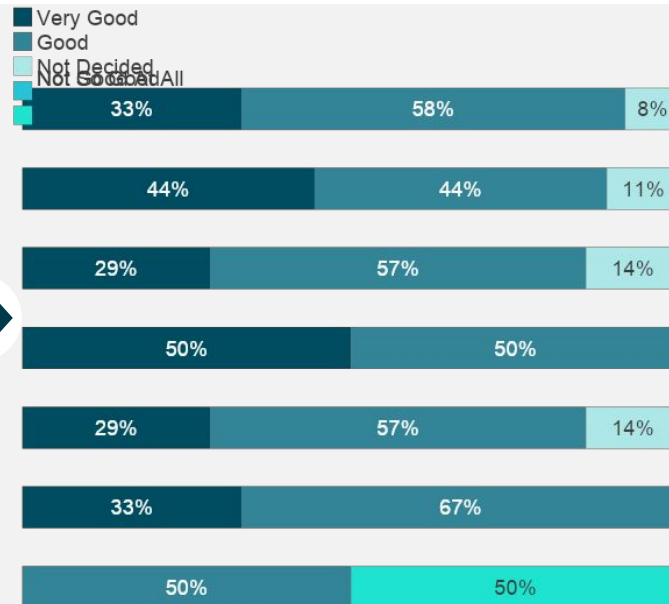
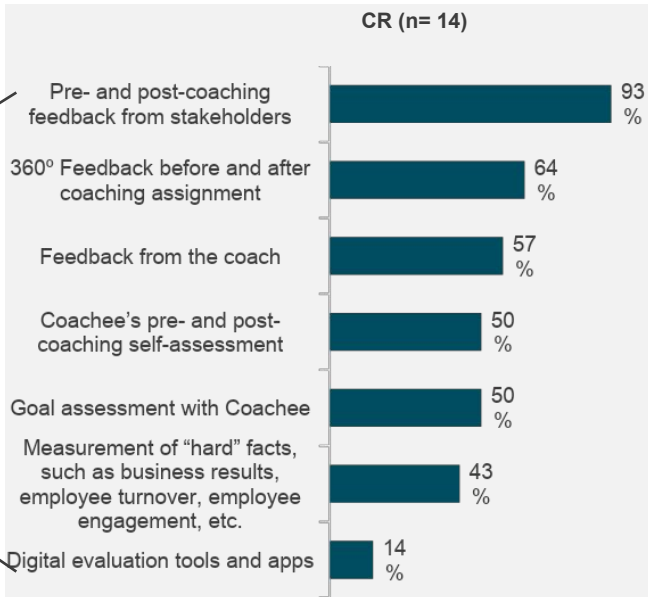
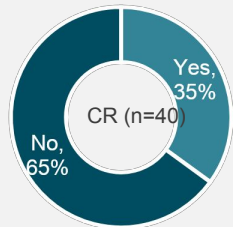
Measurement of Coaching Success

While only 35% companies use an evaluation tool to measure success of coaching, they are mostly happy with the quality and appropriateness of the tools. There is a heavy reliance on measuring stakeholders' feedback (93% in HK vs 58% overall). Hard facts are seen as appropriate to measure but only 43% used it vs 59% overall. Interestingly, 50% companies are not satisfied with digital tools.

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?

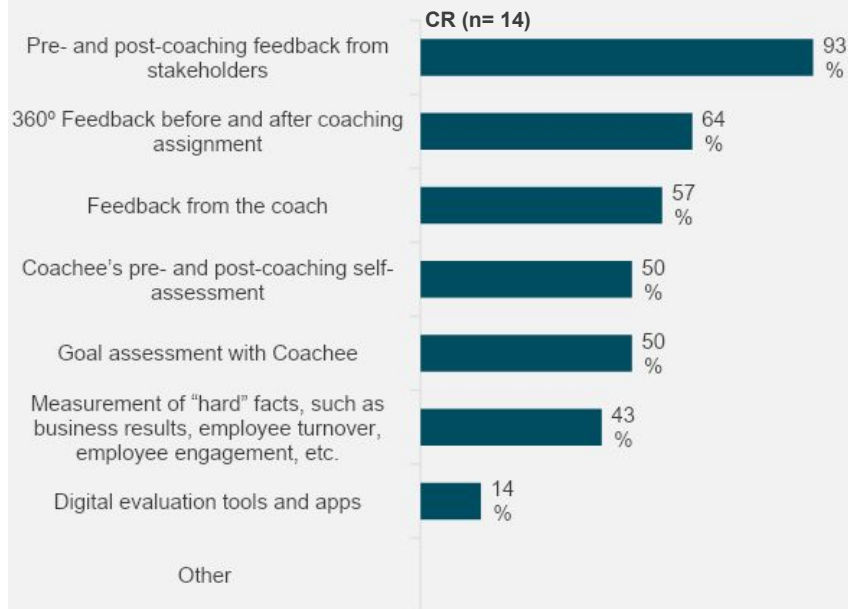
Please indicate the quality/appropriateness of each evaluation tool when used to measure the success of coaching.



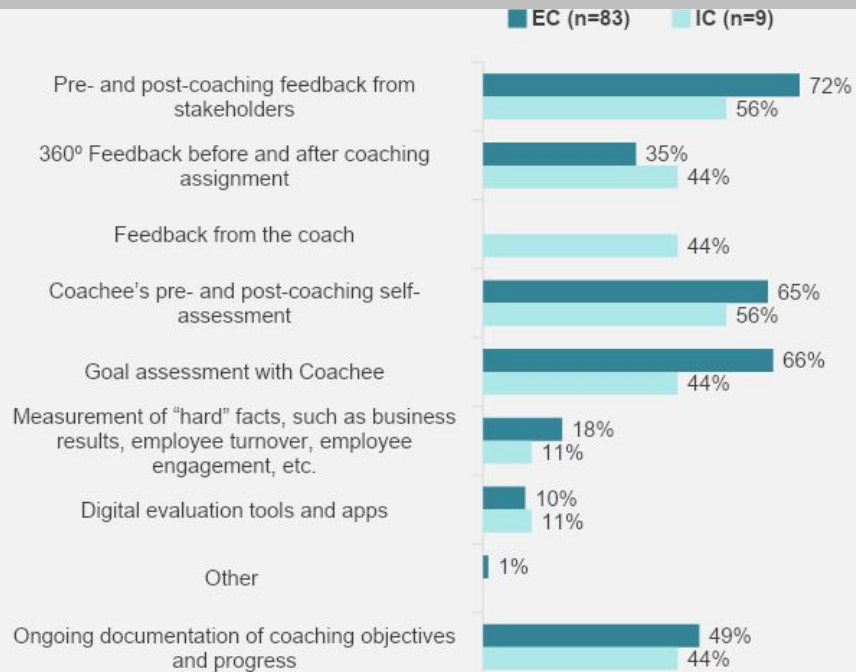
Measurement of Coaching Success

Both companies and coaches rely more on soft data (feedback) to assess the success of coaching. Measurement of hard facts is clearly not applied much for coaches (EC 27% IC 30% overall). Both companies and coaches are not using digital evaluation tools much either.

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



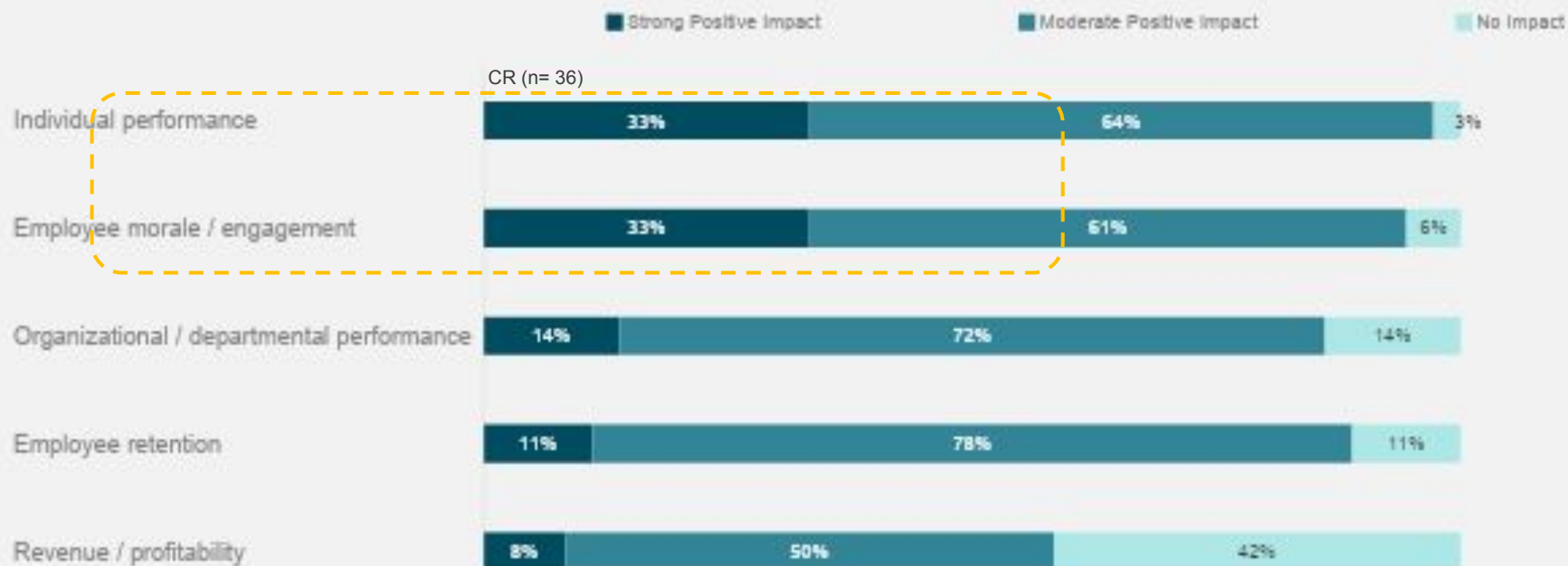
Q. Which of the following evaluation tools do you use to measure the success/impact of your coaching assignments?(Multi Choice)



Coaching Impact

Strong positive impact observed on individual performance and employee engagement while moderate positive impact on revenue and profitability (bottom line). 58% (vs 83% overall) reported seeing impact on bottom line.

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



Something to ponder: What value do Companies like to get out of Coaching and how much effort do they want to invest in measurement to obtain that data?

Coaches Professional Development

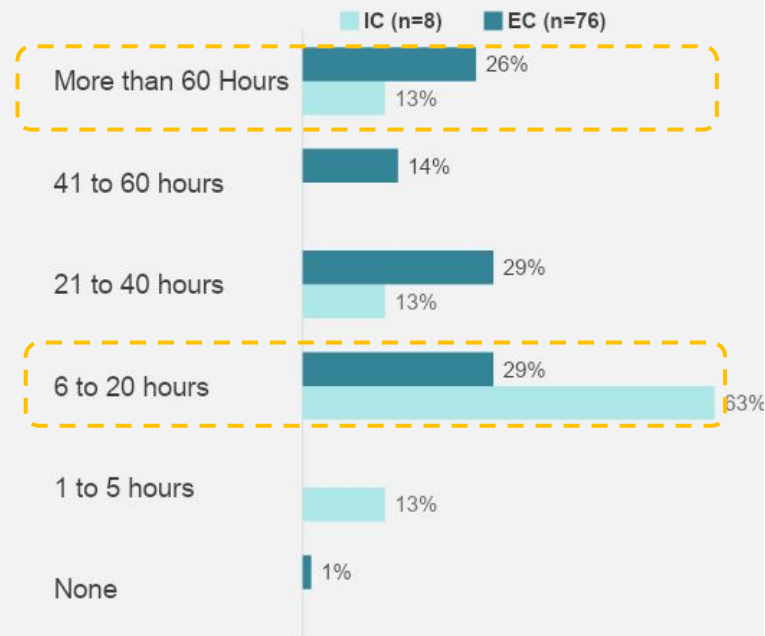
Professional Development of coaches - Practices and Time spent

**ECs invest more time in professional development than ICs but relative to other markets, HK coaches spend less time (60h+: for EC 26% in HK vs. 41% overall – and for IC 13% in HK vs. 23% overall)
Coaching webinars are more popular in Hong Kong than in other markets (62% HK vs. 35% overall)**

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



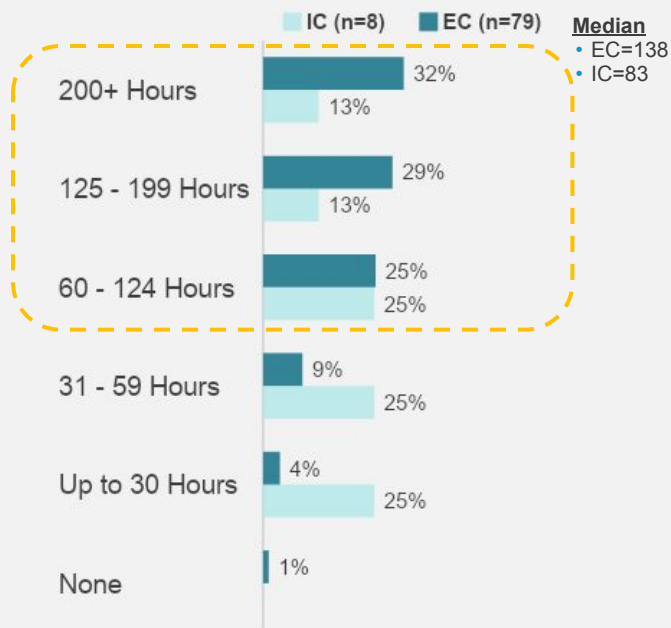
Q. How much time do you spend on continuous professional development (per annum)?



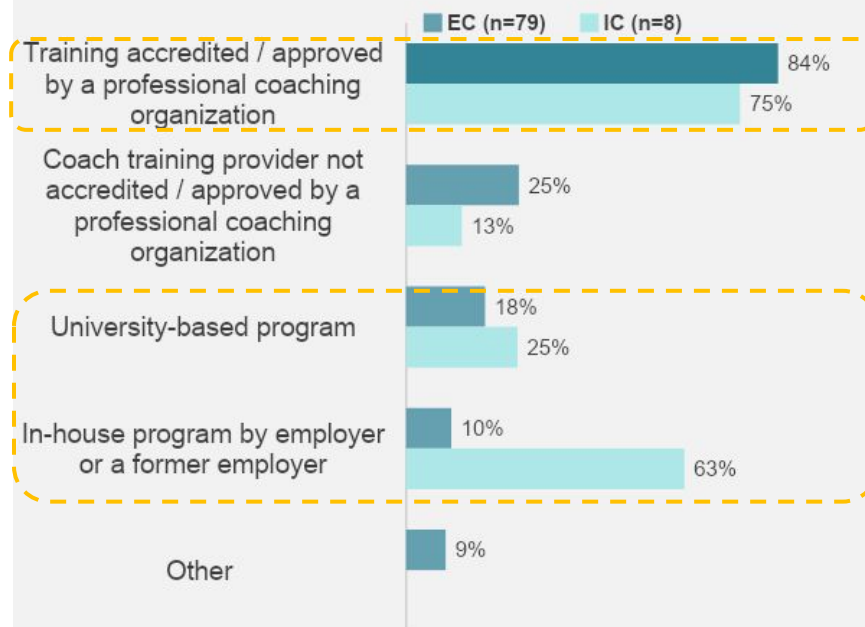
Coaches' Training and Education

ECs receive more coach specific education and training than ICs (Median EC 138 hours vs. IC 83h). Strong majority of coaches received training from accredited coaching organizations with more University based programs compared to other markets (18 & 25% in HK vs. 8% overall). HK ICs receive more in house program by employer (HK63% vs overall 39%)

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



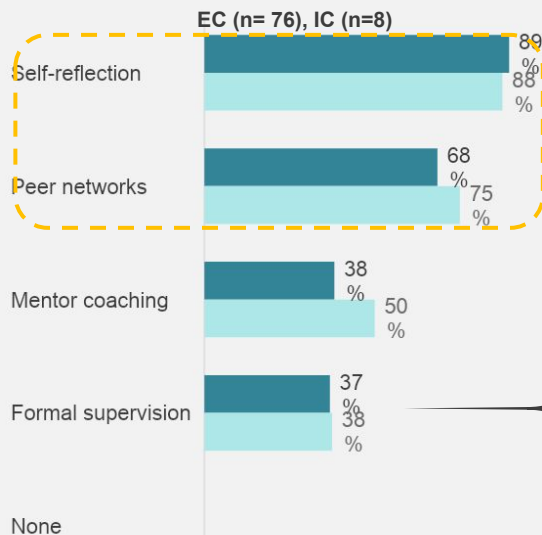
Q. Which of the following best describe the coaching education and training you have received? (Multiple Choice)



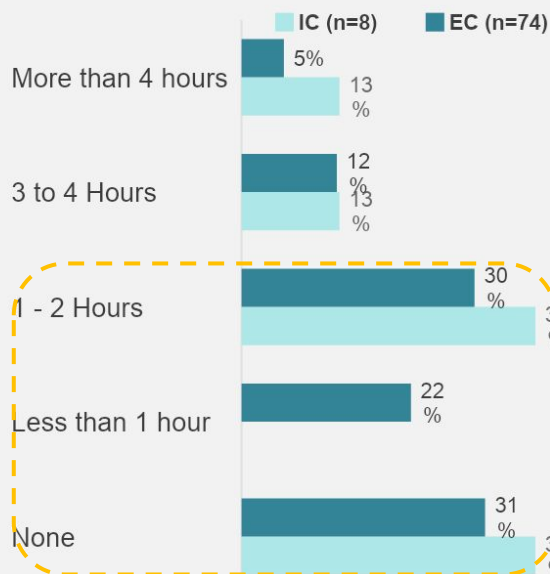
Reflective Practices/Coaching Supervision

Similar to other markets, self-reflection and peer networks are the most followed reflective practice. Coaches in HK engage in slightly more supervision than in other markets (37% in HK vs. 32% overall), although they spend less time on it - most spend 0 – 2 hours per month (34% “none” in HK vs. 21% overall). While most Coaches get supervision pro bono, one third pay up to USD 200 / hour.

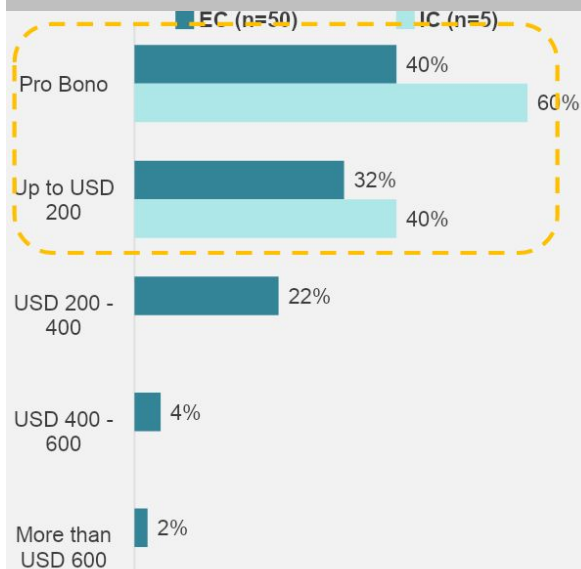
Q. Which of the following forms of reflective practices do you engage in as a coach? (Multi – choice)



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?



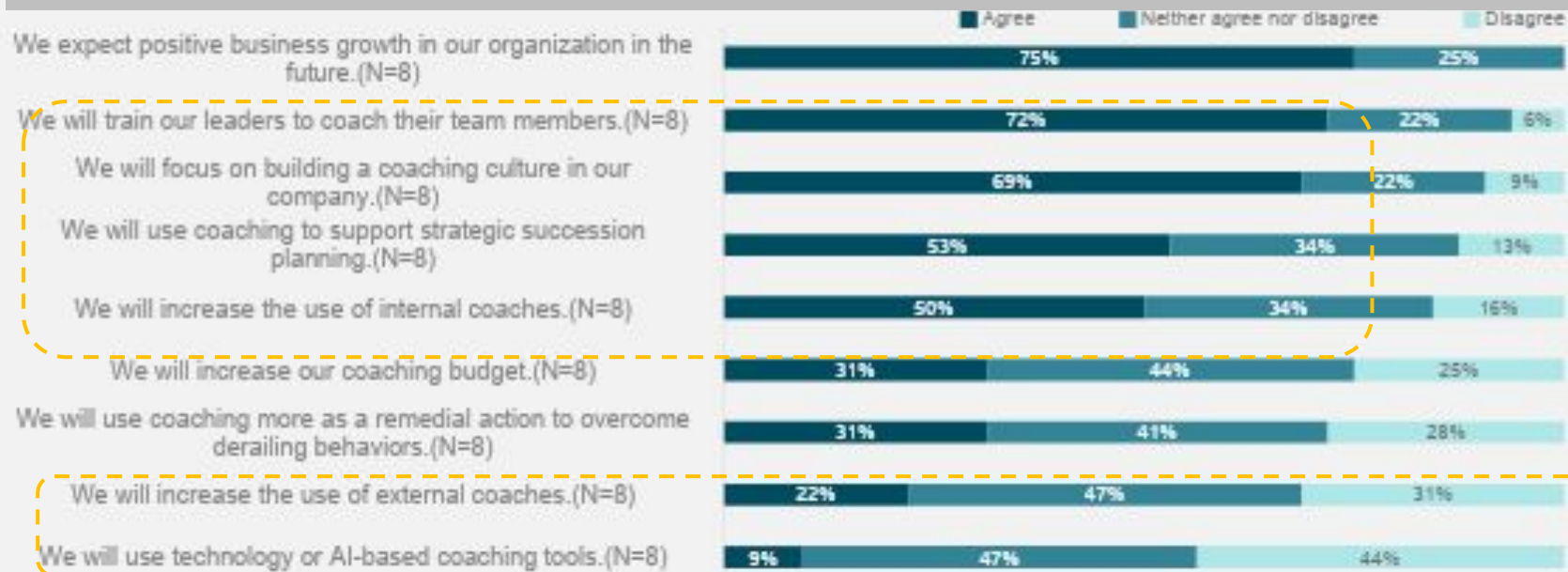
Something to ponder: How ready are HK coaches to invest time and money on formal supervision and mentor coaching as ways for professional development and sustainable well-being? What is the visibility and availability of HK mentor coaches and supervisors?

Outlook

Organizations' Perspective on Future Outlook

Similar to other markets, Companies in HK plan to increase focus on building in-house coaching capability 31% (vs 16% overall) indicate they will not increase in the use of external coaches and 44% (vs 22% overall) said they will not use technology/AI based coaching tools.

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



Something to ponder: While companies want to create internal capability for coaching, how would they go about doing it? How could companies use coaching intervention strategically to create a competitive advantage for their business?

Coaches Perspective on Future Outlook

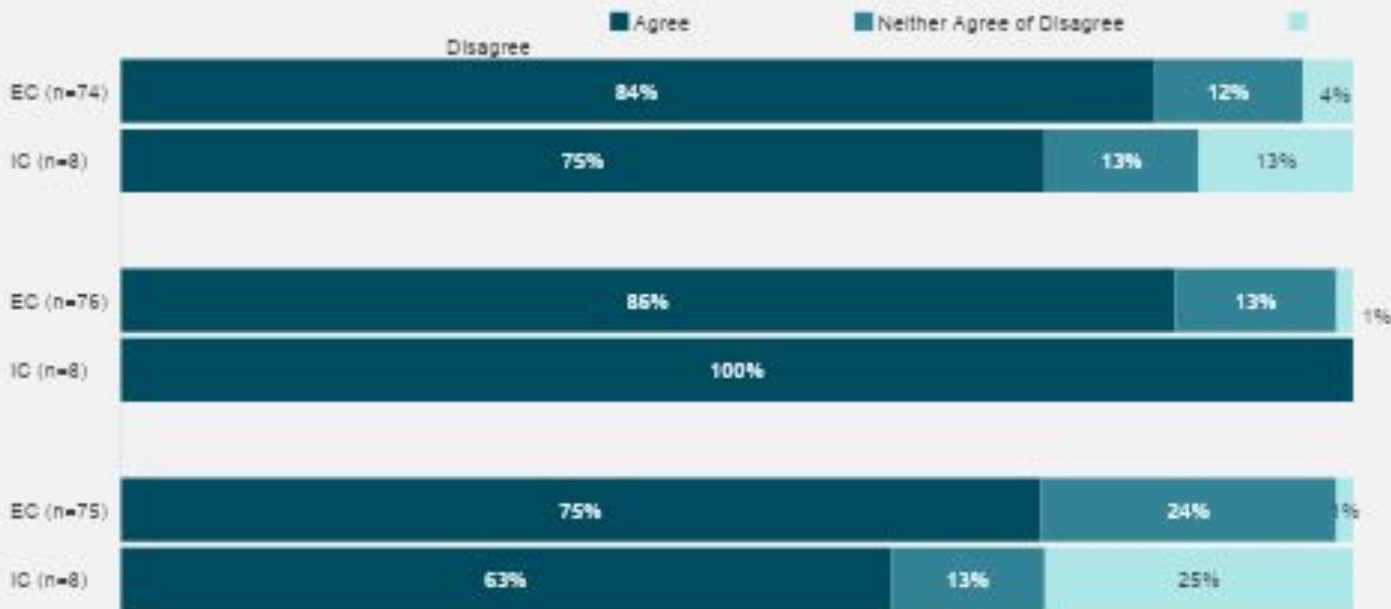
ECs and ICs perceive a positive future outlook: increase in demand and supply of coaching offerings.

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.

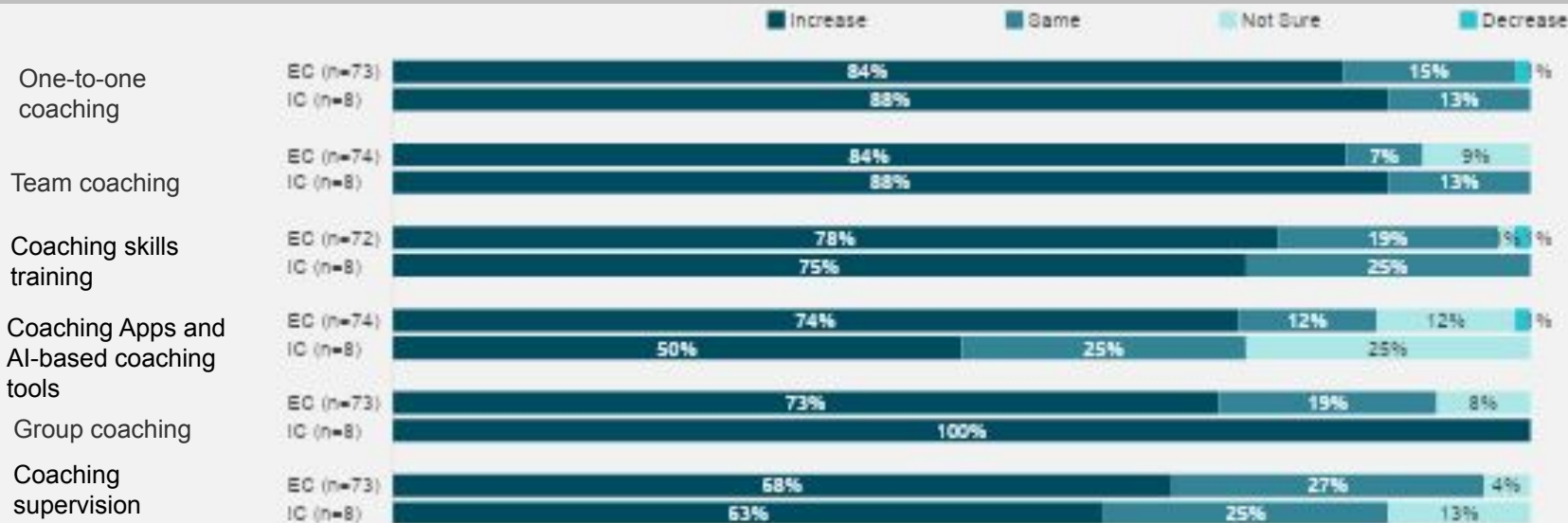


Something to ponder: How could coaches help companies see the potential in continuing to invest in coaching?

Coaches Perspective on Future Outlook

ECs and 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 will the future coaching market look like? What skills would coaches need to thrive on?

Opportunities

For Companies

- How can Companies increase their ROI of coaching through stronger contracting with coaches in linking their bottom-line results with coaching benefits?
- What would higher expectation on coaching ethical standards and coaching quality bring about?
- How can Companies leverage on coaching to support their leaders' development needs in the VUCA world to help them prepare for the future of work?

For Coaches

- 33% of HK companies reached have not used coaching. How can coaches reach out to this untapped market? Cost and coaching concept not being well known are seen as the biggest barrier. How can coaches create more value?
- How can coaches support companies in developing their internal coaches and building stronger internal coaching capability?
- What opportunities may lie in fostering further understanding between internal and external coaches?
- How can coaches ensure effective tripartite conversations on coaching outcomes?
- What is the visibility and availability of HK mentor coaches and supervisors?
- How can coaches leverage AI technology in creating more value in coaching for Companies?

Closing Thoughts

Closing thoughts

- We are happy to present to you the **Geography Report for Hong Kong**, part of the **5th Coaching Survey – an Asia Benchmark**. Individual geography reports for India, Indonesia, Mainland China, Philippines and Singapore are also available for a more detailed study.
- **The Integrated Report** is available on our website to give you an in depth and comprehensive overall understanding of the coaching landscape for the six markets.
- If as a reader and researcher you would like to dive deeper into any research question presented in this survey, you are welcome to reach out to us. We welcome your *feedback and comments, please reach out to:*

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

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



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