

5th COACHING SURVEY

An Asia Coaching Benchmark 2019

Geography Report - India

***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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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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- 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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1. Introduction, Methodology, & Purpose

Introduction

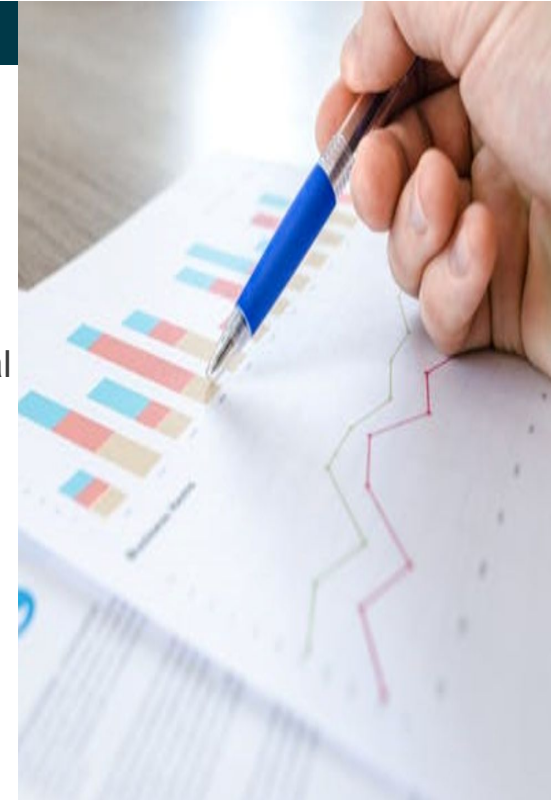
Purpose and Approach

- 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

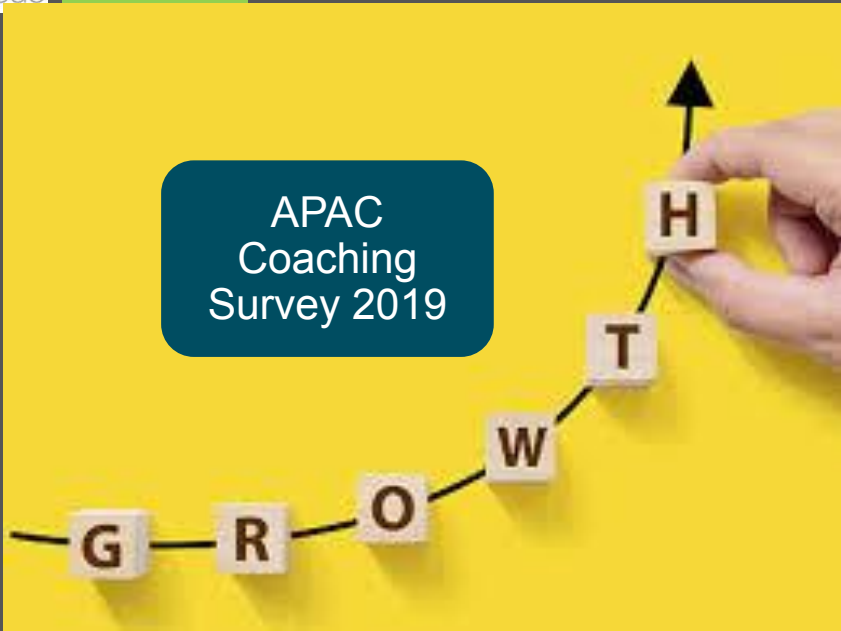
External Coach

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.



APAC
Coaching
Survey 2019

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

Progress over the years

More than 100% growth in participation in 2019 over 2017

India Survey 2019

	2010	2012	2014	2017	2019
Total Participants	NA	NA	NA	165	158
Organizations	NA	NA	NA	37	46
External Coaches	NA	NA	NA	109	97
Internal Coaches	NA	NA	NA	19	15

Thank you Sponsors

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2. Top Trends

Top Trends

1. Growth in Coaching services – a deeper penetration in markets

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

For India

- 70% of the companies have used coaching in India compared to overall 75%
- While India is still in developmental stage in the coaching market, 30% (overall 26%) of the companies reached have never used coaching.
- 6% companies (overall 2%) said they are unlikely to introduce coaching at all
- Top reason for India companies unlikely to introduce coaching is coaching concept not being well-known (similar to the overall report) followed by finding coaching very expensive.

Top Trends

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 India*

- Most companies work with a combination of ECs and ICs. Only 23% engage only ECs
- 71% of the companies find ICs more cost effective (82% overall)
- There is an agreement on the practice of using more ECs for senior management and ICs for lower management. ICs view their knowledge of the company context as a strong advantage, while ECs value their external perspective; companies have mixed views.

*the sample of internal coaches responding is low and may not reflect the overall market in India.

Top Trends

3. General concern about Internal Coach's (IC) role not being 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 India*

- For 87% of the companies, coaching is less than 51% of the IC's job responsibilities
- 68% ICs agree that coaching responsibilities are a part of their yearly goal setting, while 65% ICs say it is linked to their career development plan and advancement, only 54% feel it is linked to compensation and benefits
- ICs are more focussed on Performance and Leadership coaching (73% and 82% respectively) followed by Executive and Communication Skills Coaching (55% and 64% respectively)

*the sample of internal coaches responding is low and may not reflect the overall market in India.

Top Trends

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 India*

- Coaches spend between 1 to 4 hours per month engaging in Coaching Supervision, even though it is a very new concept. While most ICs get supervision pro bono, majority (almost a quarter) of the ECs pay upto USD 200 per hour per hour for a formal supervision session
- 56% ECs and 55% ICs spend more than 60 hours on Professional Development
- 81% ECs receive training from accredited coaching organizations. 55% ICs receive training as part of in-house program by employer which is higher than the overall average of 39%

*the sample of ICs responding is too low and may not reflect the overall market in India.

Top Trends

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 India

- Coaching Definition is well understood by vast majority in companies, as with the overall survey 67% - 89% agree with it being facilitation. Elements of guidance and expertise sharing are also present in India as with other markets

Top Trends

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

- **Coaching quality:** While 6 out of 10 companies expressed their satisfaction with the coaching services rating it very good/good, 3 out of 10 respondents were undecided on quality of coaching. 7% of the respondents were not happy with the quality of coaching services. This trend remains the same compared to 2017 survey
- **Coaching benefits:** 84% of respondent companies see some impact of coaching on their business bottom line. Coaching seems to have a strong positive impact on individual performance and employee morale/engagement while organization performance, employee retention, revenue and profitability received a moderate positive impact. Only 16% reported no impact on the bottom line

For India

- 58% companies rated coaching quality as good and very good which is marginally lower than the overall market data 61%. 32% of companies are undecided on the quality of Coaching which is in line with the overall market percentage (32%).
- While only 41% companies use evaluation tool to measure success of coaching, they are mostly happy with the quality and appropriateness of the tools. There is heavy reliance on measuring stakeholders' feedback and hard facts.
- Most companies received the benefits they sought as well as benefits they did not seek, with divergence in:
 - 'Realigned behaviors on expectations'- 46% companies said they sought an increase but did not receive it
 - 'Successful goal attainment' - 43% companies said they sought an increase but did not receive it
 - 'Increased well being' - 41% companies said they sought an increase but did not receive it.

To be contd..

Top Trends

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

- **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.
- **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 India

- About 67% companies reported to have requested for coachees' feedback from the coaches.
- Companies and EC are aligned on the criteria for selection of EC. Top 3 criteria are - Coaching Experience, Chemistry and Language (similar to overall).

Top Trends

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 India*

- Most ECs (94%) and all the ICs (90%) do not use AI or recent technology like Chatbot or Coaching Apps for assignments. 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 (61%), use technology (31%), and increase the coaching budget (39%). While companies want to continue using external coaches, 80% 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 India





- Companies plan to increase overall focus on coaching. While 43% companies say they want to increase using external coaches, 77% say that they also want to train their leaders to coach team members and 70% to build a coaching culture in the company. and 30% said they will 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.

3. Demographics

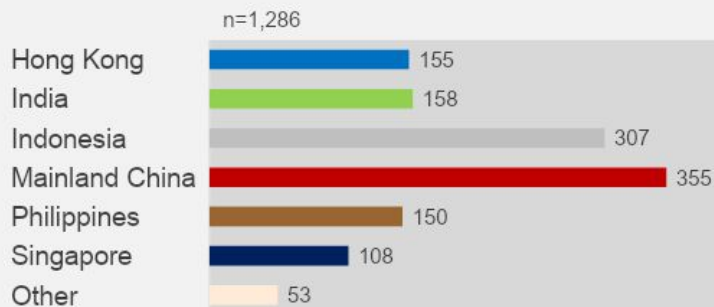
Participant Overview & Distribution

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%
	Organization 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%

A total of 1286 valid responses were received in this survey. The highest number of respondents came from Mainland China (355) followed by Indonesia (307). Out of the total number of respondents, ECs attributed half the total respondents, CRs one third and ICs about 10%. Overall, there are more female respondents than male and 74% took the survey in English.

Participant Overview & Distribution

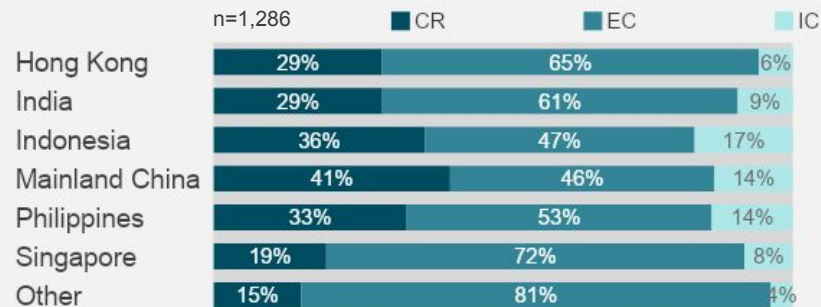
Markets



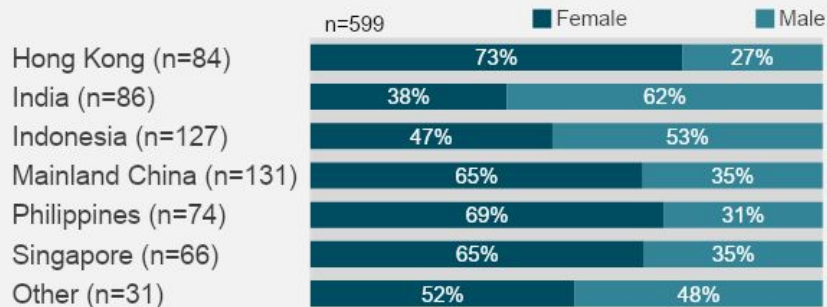
Role



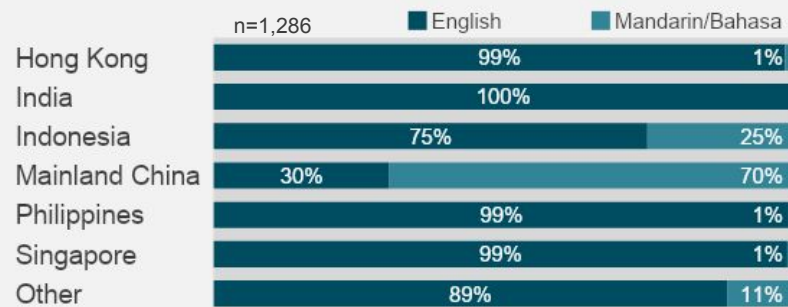
CR= Company/ Org Representative, EC= External Coach, IC= Internal Coach



Gender (EC & IC)



Language used for Survey



Participant Overview & Distribution

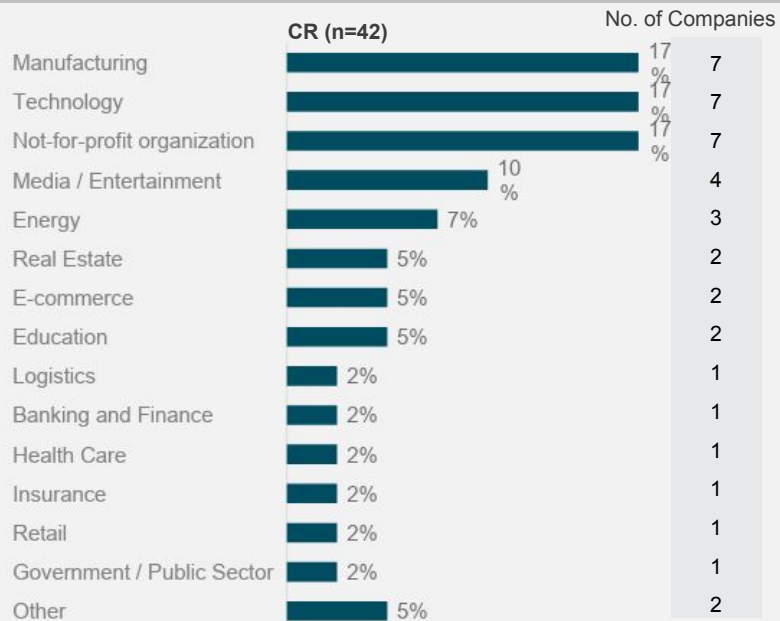
- Across all markets, the number of IC respondents are relatively lower than ECs and CRs. Mainland China, Indonesia and the Philippines have a relatively wide spread of respondents from ECs and CRs while Hong Kong, India and Singapore, the majority of respondents were from ECs.
- Majority of participants responded the survey in English while 70% respondents in Mainland China used Mandarin and 25% in Indonesia used Bahasa Indonesia.



Participating Organizations - Distribution by industry sector and type

Well diversified sample from multiple sectors.

Q. What industry sector does your company operate in?

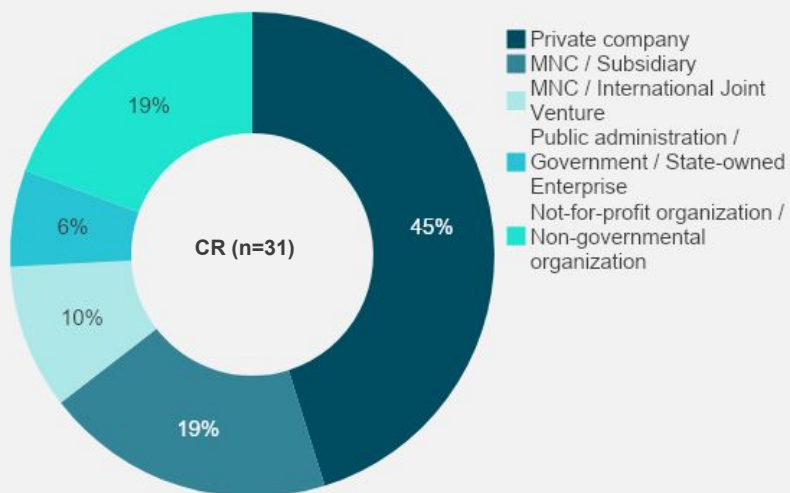


- The survey indicates a well diversified sample from a large number of industry sectors. The highest CR respondents came from Manufacturing (26%), Technology (13%) and Education (10%) sectors.
- In 2017 Survey, the highest CR respondents came from Technology (13%), Retail (9%), and Banking & Finance (7%) sectors.

Participating Organizations - Distribution by industry sector and type

Private companies are the largest participants

Q. What is your company status?

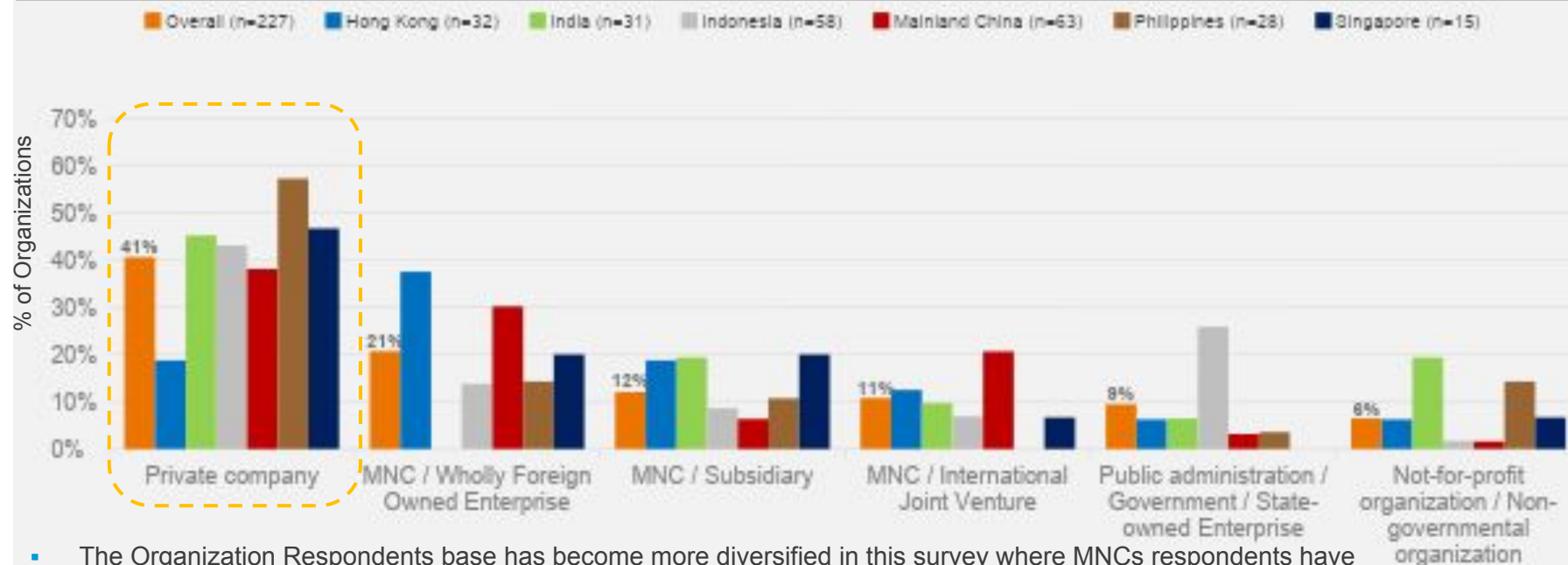


- MNCs, NGOs and Private companies constituted the largest proportion of respondents.
- Private companies constituted a majority (45%) of the sample followed by MNCs and NGOs.

Types of Participating Organizations

Private companies are the largest participants across markets barring Hong Kong

Q. What is your company status?

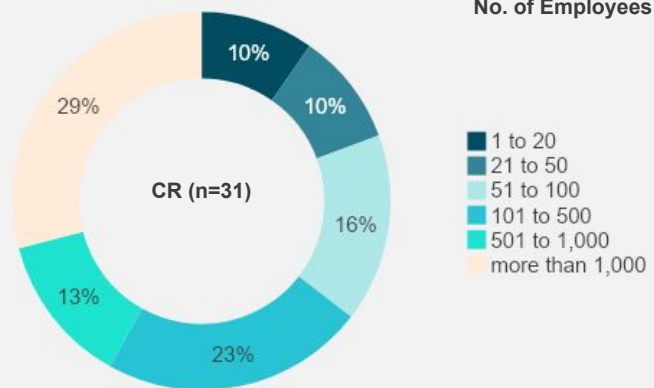


- The Organization Respondents base has become more diversified in this survey where MNCs respondents have changed from 73% in 2017 survey to 44% in this survey. This may be due to the inclusion of three new markets in the survey as well as extended reach of Coaching community in the local private companies.

Participating Organizations – Distribution by Employees and Revenue

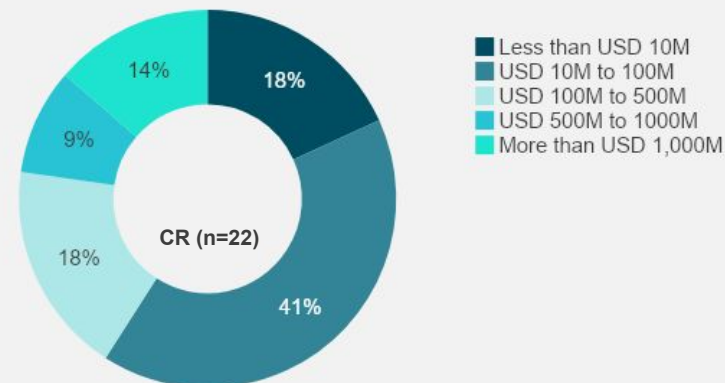
65% of the organizations employ more than 100 people

Q. How many people does your company employ locally?



Well diversified sample from multiple revenue size companies

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



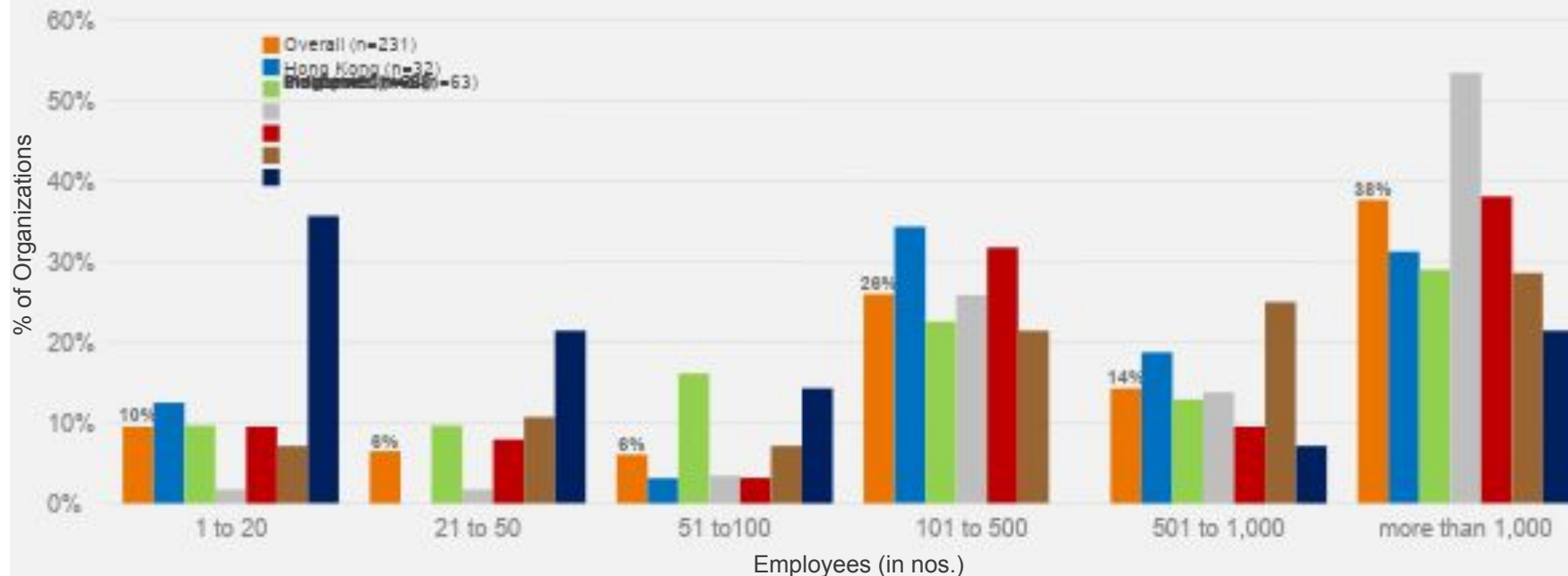
Participating Organizations – Distribution by Employees and Revenue

- The survey has reached out to companies of varying employee size ranging from upto 100 employees (36%), 101-1000 (35%) and more than 1000 employees (29%).
- Well diversified sample from varying revenue brackets ranging from less than USD10M (18%), USD 10M - 1000M (68%), and more than USD 1,000M (14%).

Participating Organizations by Number of Employees

Employee population sample size varied in different markets

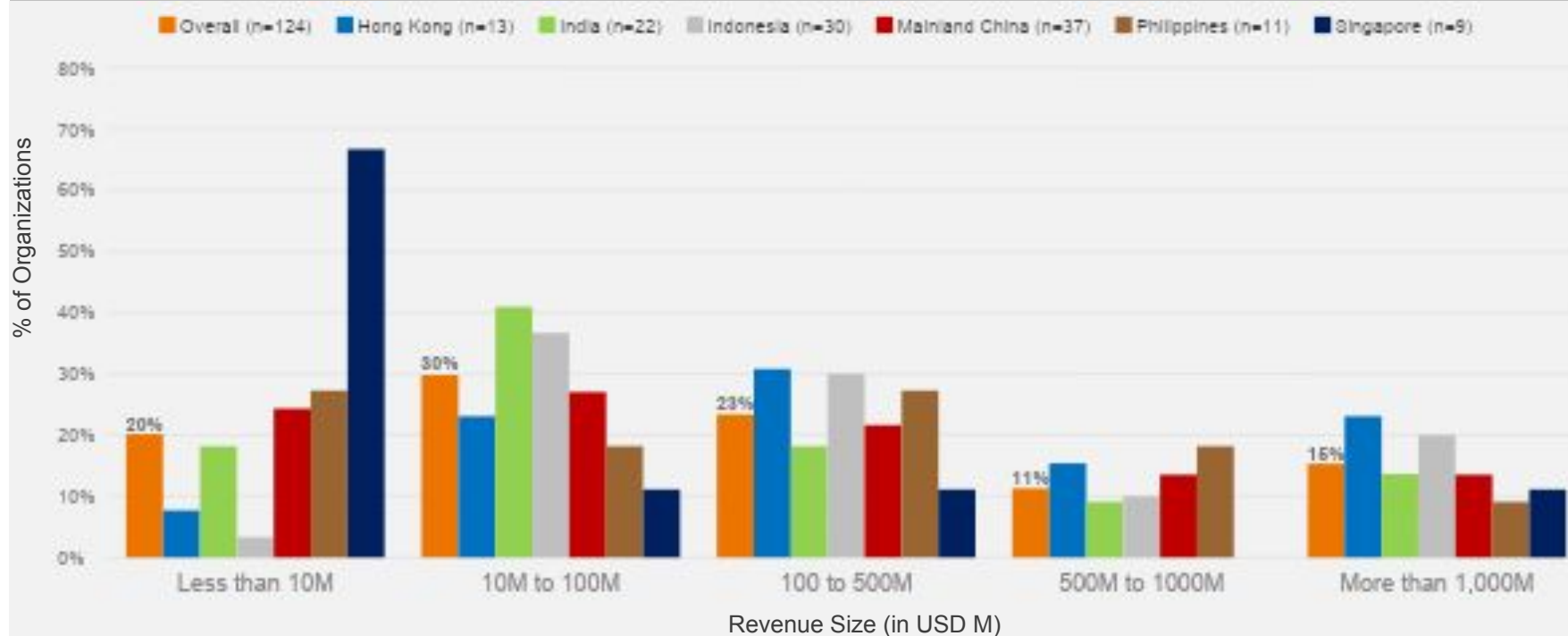
Q. How many people does your company employ locally?



Participating Organizations by Revenue Size

Market –wise breakdown

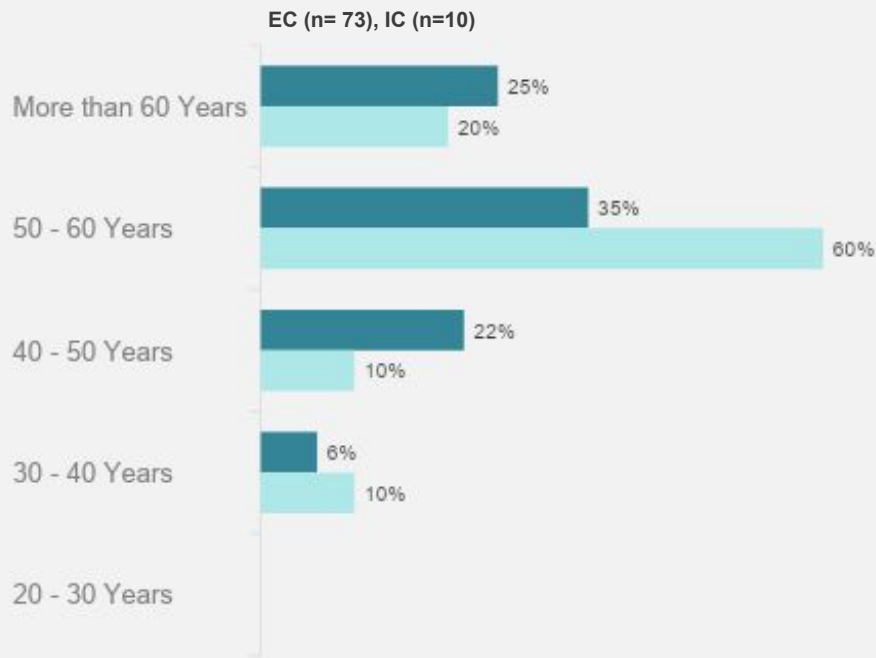
Q. What is the company size in terms of revenue in USD million per year (local market only)?



Distribution of Coaches by Age

Median age of an EC in India is 52 Years vs 53.5 years for IC.

Q. What is your birth year?

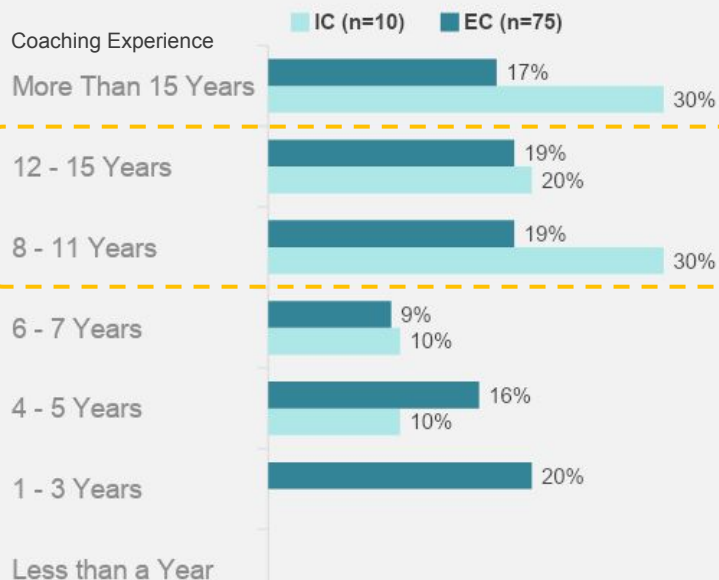


- 35% of the ECs are in the age range of 50-60 years, 25% more than 60 years, 22% are in 40-50 years and only 6% in 30-40 years
- 60% of the ICs are in the age range of 50-60 years, 20% in more than 60 years and 10% in 40-50 and 30-40 years each

Distribution of Coaches by Years of Experience

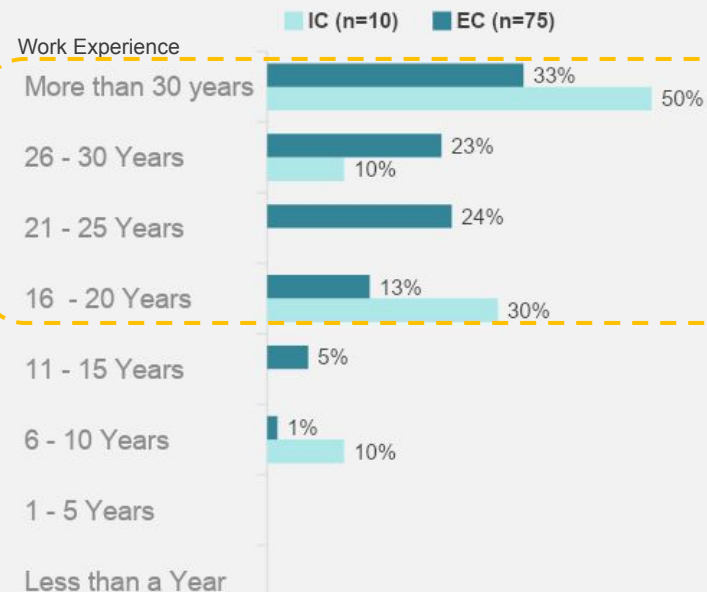
ECs have average coaching experience of 8 years , ICs have average coaching experience of 12.5 years

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



ECs have average work experience of 28 years , ICs have average work experience of 30 years

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



Distribution of Coaches by Years of Experience

- 36% of ECs have coaching experience of up to 5 years, 9% from 6 to 7 years, 19% from 8 to 11 and 12 to 15 years each and 17% in 15 years and above bracket
- 30% of ICs have coaching experience of 15 years and above, 20% from 12 to 15 years, 30% from 8 to 11 years, 10% from 6 to 7 years and 4 to 5 years each
- 50% of the ICs have overall working experience of more than 30 years as against 33% of ECs in the same experience bracket

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 ICs and ECs stay relevant?

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%

- ECs in Indonesia have an average coaching experience of 6 years while ECs in Singapore have an average coaching experience of 10 years.
- India has the lowest number of Female EC as compared to other markets

Something to ponder: With the increasing demand of coaching for younger coachees and with companies focusing more on building internal capability for coaching, how do the more mature ECs stay relevant?

*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%)

- ICs in Indonesia and Mainland China have an average coaching experience 3 years' while ICs in India have an average coaching experience of 14 years
- India and Indonesia have the lowest number of Female IC compared to other markets

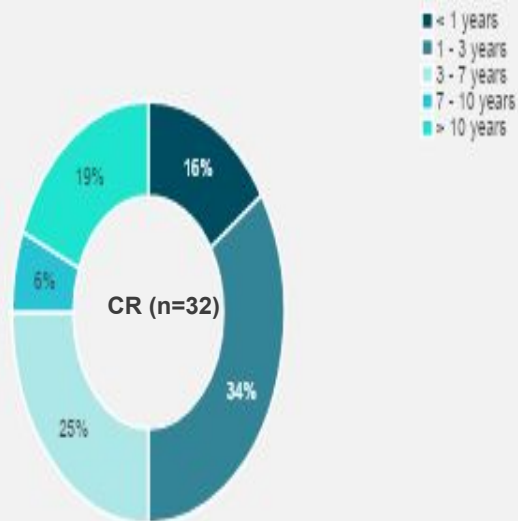
*n may vary for each column depending on how many answered those questions

4. Landscape of Coaching Market

Prevalence of Coaching Services

For the sample of organizations reached, Coaching is a relatively young concept as 50% of the organizations have used coaching for less than 3 years

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

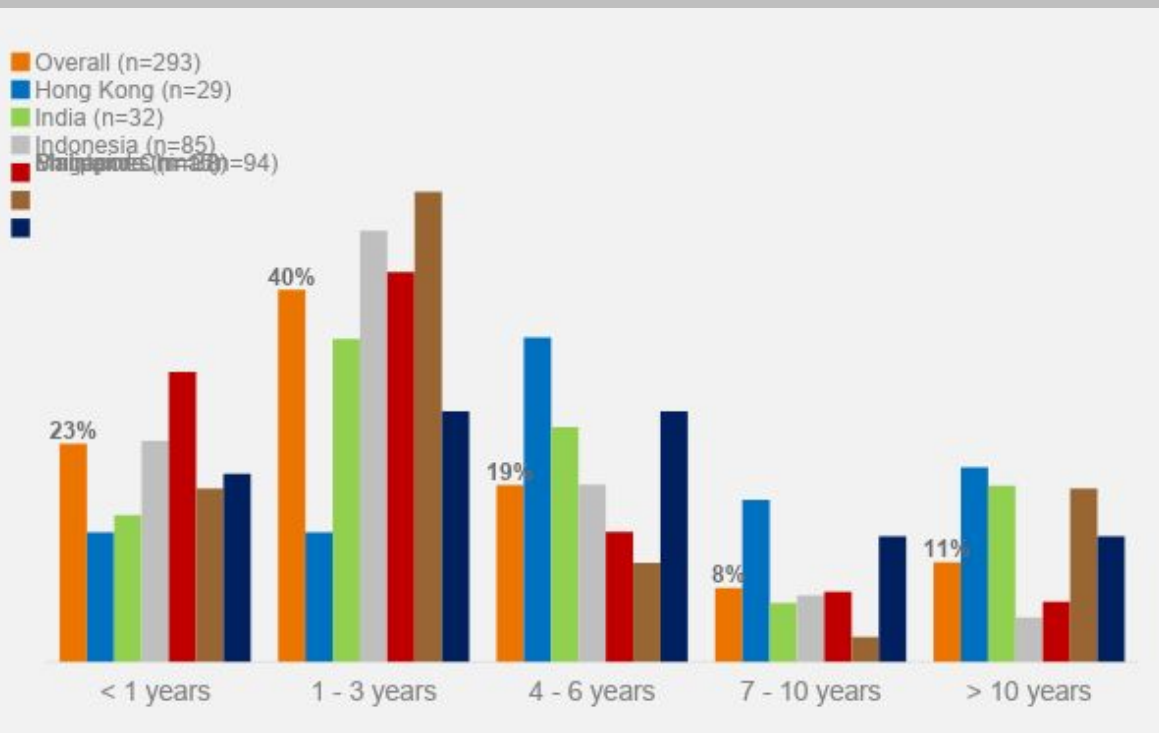


- 19% companies have used coaching services for more than 10 years, 31% for 3-10 years and 50% for 3 years or less
- This points to a recent growth in companies using coaching. As brought out in the previous section, coaching is penetrating deeper in MNC, private sector and expanding into new industry sectors like Non-Government sector.

Prevalence of Coaching Services – By Market

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

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



- Relatively recent growth in Indonesia, Philippines, Mainland China and India
- More companies in these markets have used coaching for less than 3 years while Hong Kong and Singapore are relatively mature markets with more companies having used coaching for 4-6 years.

Adoption of Coaching - by Market

74% of organization that participated have used coaching services

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

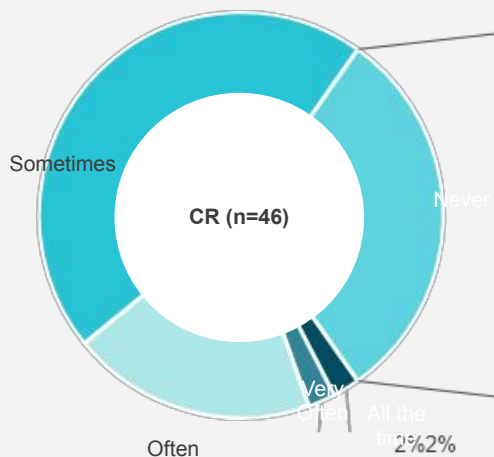


In the 2017 Survey, 63% of companies used coaching services

Adoption of Coaching

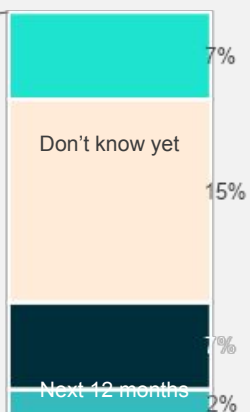
Organizations that have used Coaching "Sometimes" and "Never" comprise 76% of the market and reflect expansion opportunity

Q. How frequently does your company use coaching services?



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

Not at all



Next 36 months

Q. Reasons why your company is unlikely to introduce coaching



Adoption of Coaching contd...

- Coaching services are being more widely adopted and there is opportunity for growth
- 74% of the companies reached this year have used coaching services as compared to 63% in the 2017 Survey, indicating an upward trend in adoption of coaching.
- Companies that have used coaching only "sometimes" (48%) and "never" (25%) comprise 73% of the market. This points to an expansion opportunity.
- Of the 25% companies who have "never" used Coaching, 8% indicated that they intend to adopt coaching in the next 1 to 3 years while 15% indicated that they are unsure. The top 2 reasons for companies to not introduce coaching are:
 - coaching concept is not well-known in the company
 - coaching is too expensive for the company

In the 2017 Survey, lack of support from top management and lack of awareness were the 2 main reasons.

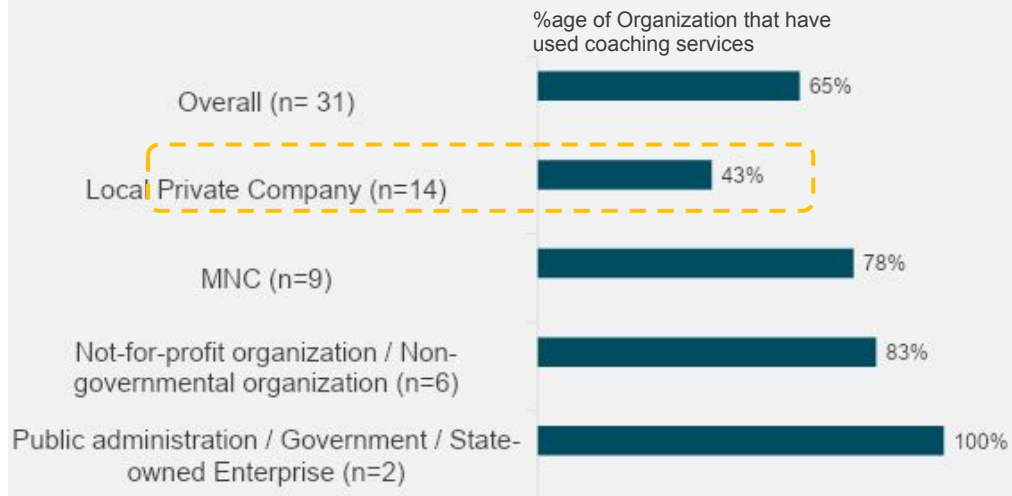
- It is also interesting to note that the willingness to introduce coaching is increasing as only 2% of the organizations reached are UNLIKELY to introduce coaching as compared to 13% of the organizations in the 2017 survey.

Something to ponder: Given the barriers that maybe stopping companies from adopting coaching, what strategies can coaches use to manage the cost-benefit arbitrage as perceived by companies? Can technology play a role in making coaching more cost effective?

Coaching Services Adoption by Type of Organization

Widespread penetration across all types of organizations with scope of improvement in local private companies

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



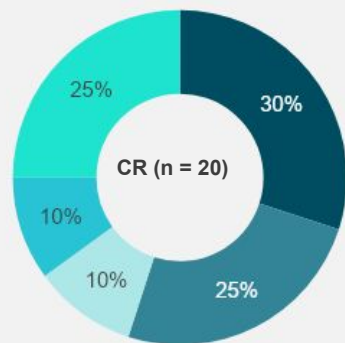
Coaching seems to be permeating deeper and expanding into all company types. In 2017, MNCs and private companies topped the list of organisations using coaching services; this year 79% of the MNCs, 70% of the private companies, 95% of the government & public sector companies and 87% of the NGOs reached have used coaching services.

Target Clientele

ECs clientele is aligned with where the demand for coaching services is originating from, particularly in case of Private Companies. Also, 59% of ECs have Self-Paying clients as well as 56% as Start-up entrepreneurs

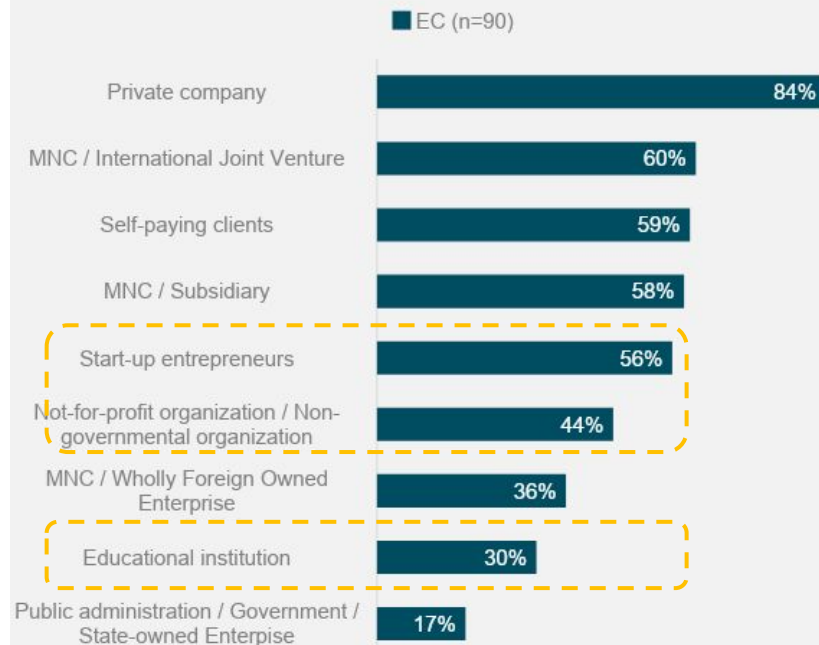
Q. What is your company status? + Q. How frequently does your company use coaching services?

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



- Private company
- MNC / Subsidiary
- MNC / International Joint Venture
- Venture
- Public administration / Government / State-owned Enterprise
- Government / State-owned Enterprise
- Not-for-profit organization / Non-governmental organization
- Non-governmental organization

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



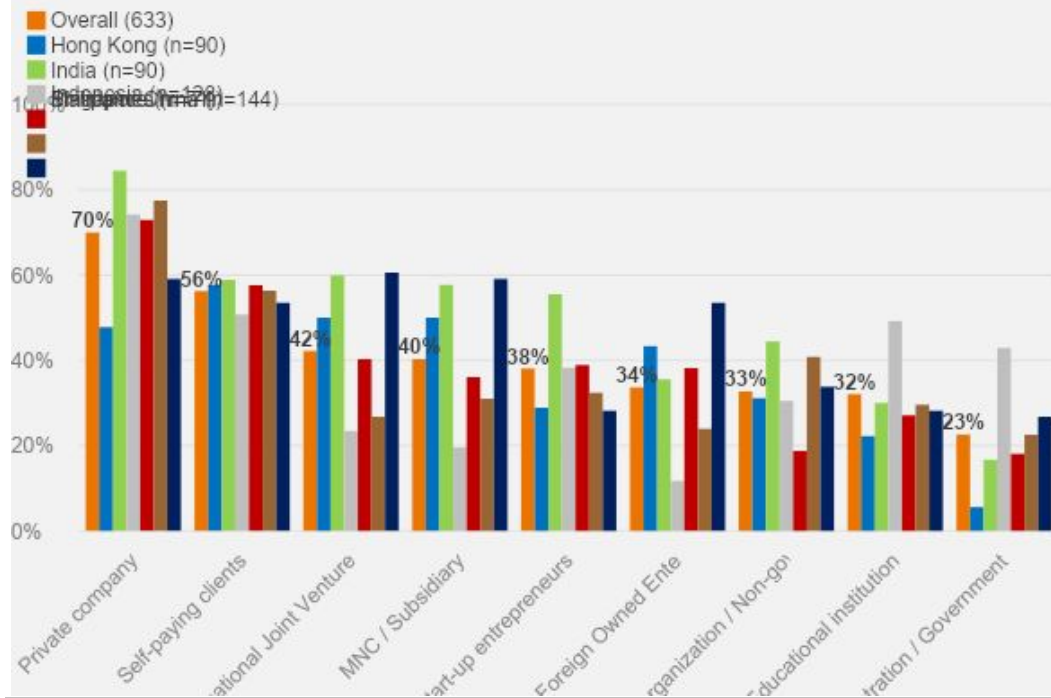
Target Clientele contd...

- 84% of the ECs are working with Private Companies and 60% say they also work with MNCs, Self-Paying Clients (59%)
- Newer target areas for coaches to focus on is also emerging from the survey – Start-ups/Entrepreneurs (56%), NGO sector (44%) and Educational Institutions (30%)
- In the 2017 Survey, the top 3 areas of target clients for ECs was MNC (Wholly Foreign Owned Enterprise, International JV), Private Local company and Self-paying clients

EC Target Clientele – By Market

Most ECs have Private Companies and Self-paying clients

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

Across all markets, Private Companies and Self-paying clients top the list as the most relevant client group for ECs. MNCs are the third largest with the highest for Singapore (approx. 60%) and lowest in Indonesia (approx. 30%). Prevalence of coaching in non-profit sector is highest in India while coaching in the Educational and Public sector is the highest for Indonesia

Something to ponder: Coaching is permeating deeper into the market. There is opportunity for growth and expansion into new industry sectors. How could the coaching industry prepare to meet this demand effectively?

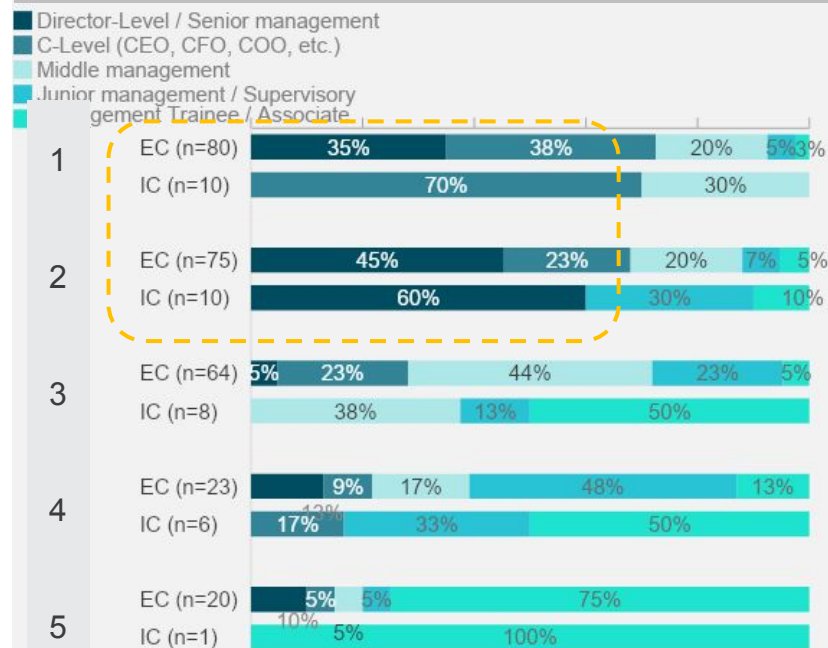
Target Groups for Coaching Services

The main target group for companies is Senior Managers and C - level, 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)



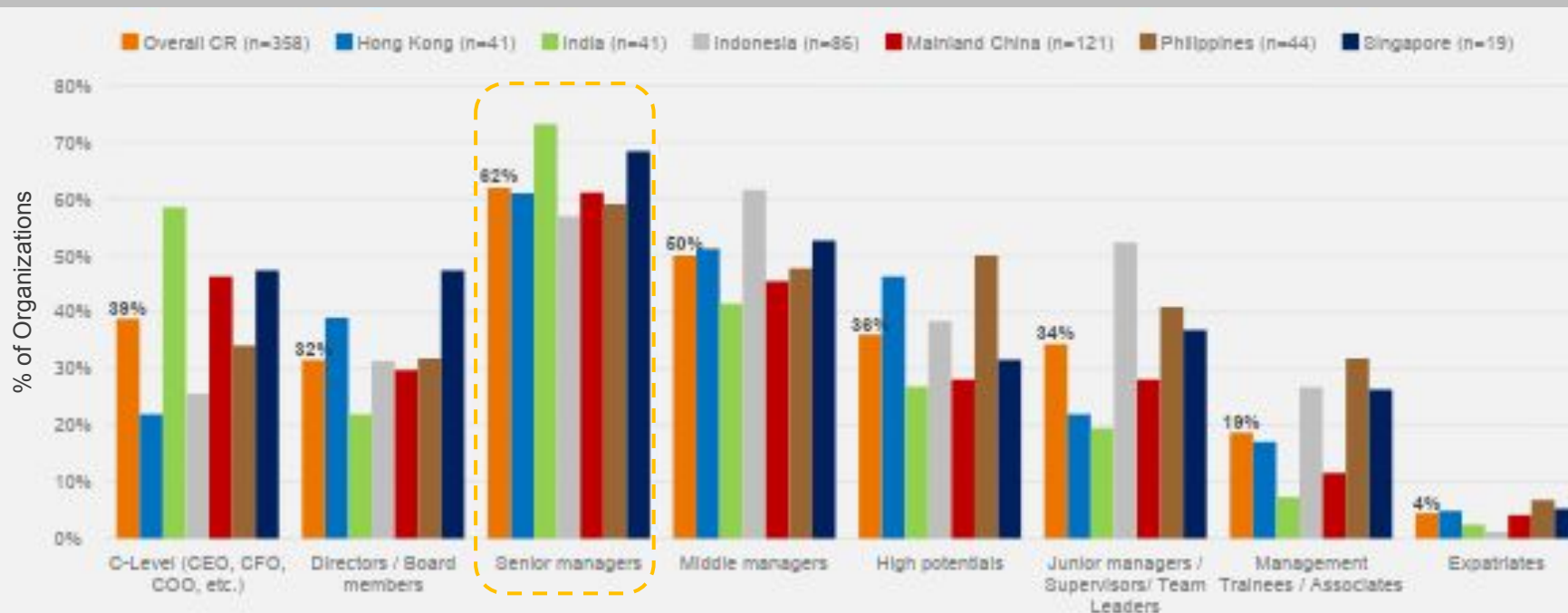
Target Groups for Coaching Services

- Highest target group receiving coaching services in a company is Senior Managers (62%) followed by C-Level Managers (59%).
- 41% companies say they are offering coaching to their Middle Managers and 27% to High potentials.
- When we compare EC to IC, we find their main clients are also from Senior and C-Level management.

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)

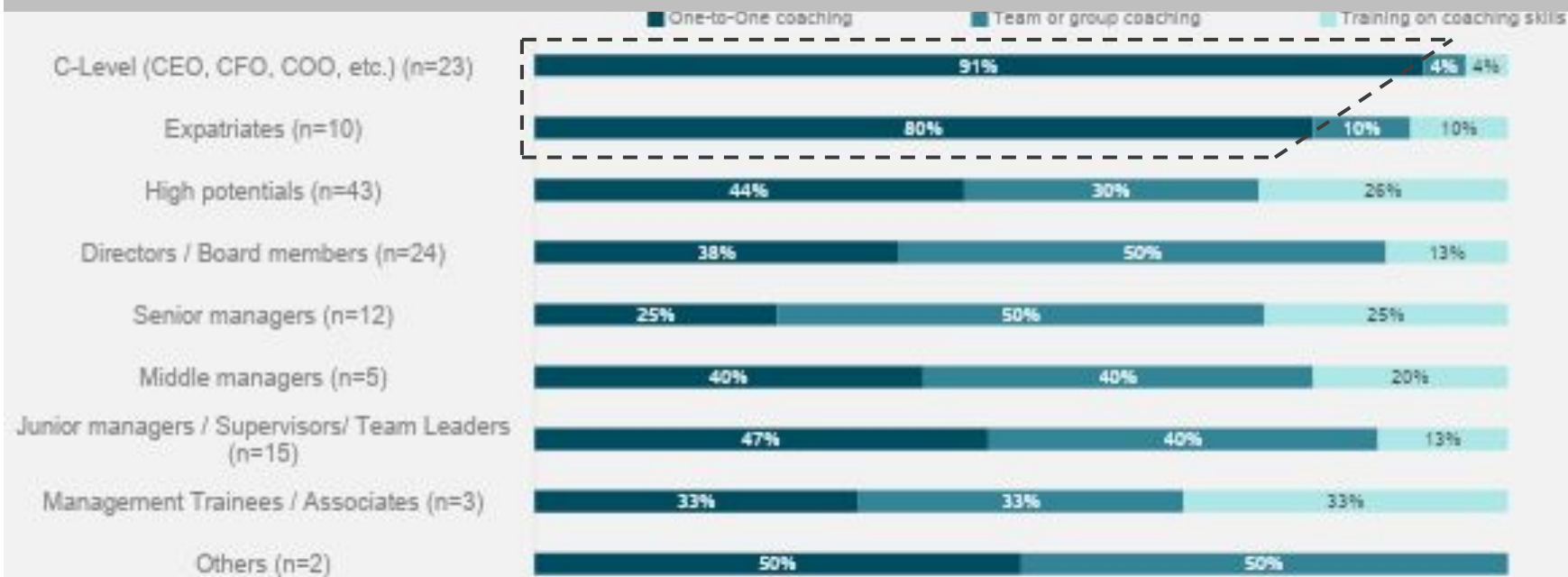


In the 2017 Survey, Companies offered coaching to all management levels. Senior management level is targeted more for coaching in China than in HK and India

Types of Coaching Intervention - By Target Groups

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?



Types of Coaching Intervention - By Target Groups contd...

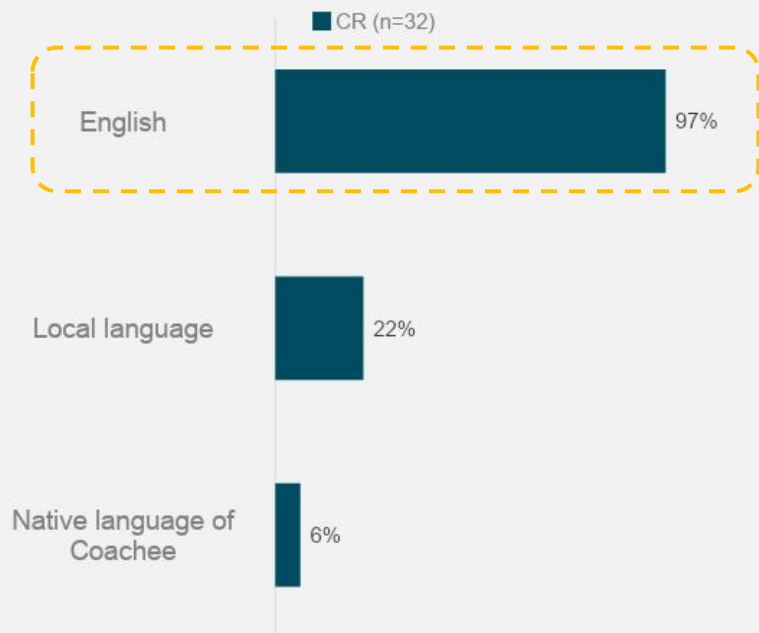
- As the seniority level of the coachee increases, 'One-to-One Coaching' intervention is the most widely offered (average 61%). For middle and junior management, there is focus on group/team coaching (40% and 47%)
- It was also reported that a big majority (80%) of expatriates are offered 'One-to-One Coaching'
- Companies also reported that they offer 'Training on Coaching Skills' intervention across all management levels whereas, the 2017 survey showed that coaching skills training was mostly being offered to senior & middle managers and high potentials.

Something to ponder: While it's encouraging to know that companies are offering coaching skills training to all levels of management, it will be interesting to explore how companies integrate this with company culture and business practices.

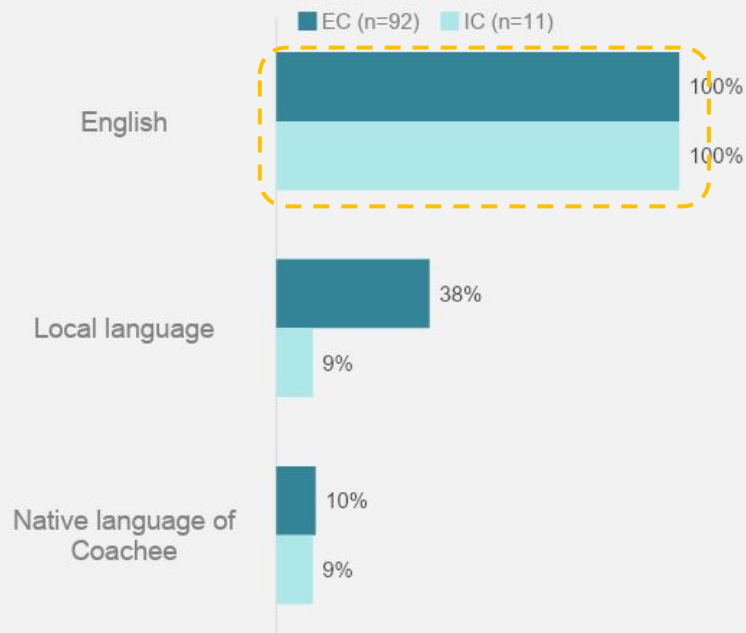
Preferred Language for Coaching

English is the preferred language of coaching in the Indian market. However, ECs are also meeting the demand of coaching in local language from organizations

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



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



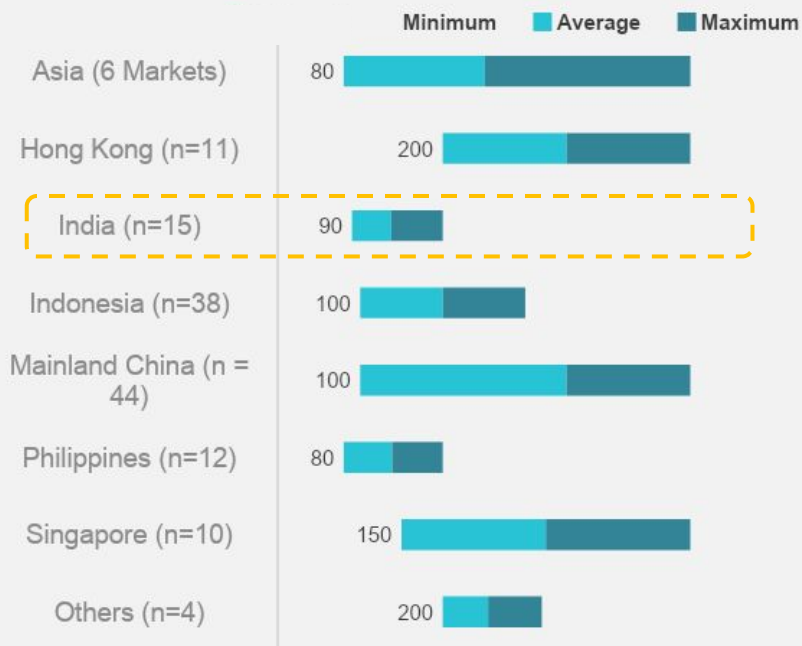
Preferred Language for Coaching contd...

- For companies, coaching in English is most prevalent (97%), followed by Local language (22%) and native language (6%)
- For ICs coaching in English is the most prevalent (100%) followed by Local language and Native language (9% each)
- For ECs coaching in English is the most prevalent (100%) followed by Local Language (38%) and and Native language (10%)

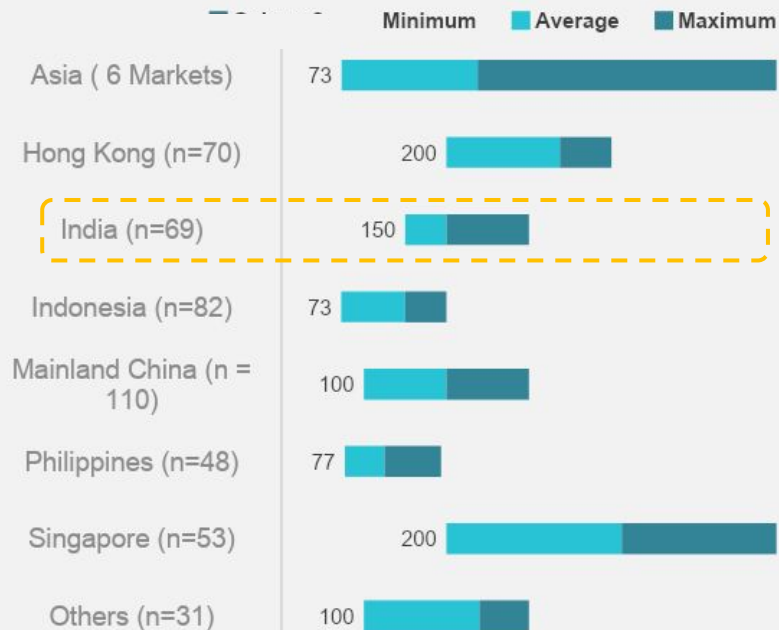
Coaching Rates

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

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 Rates contd...

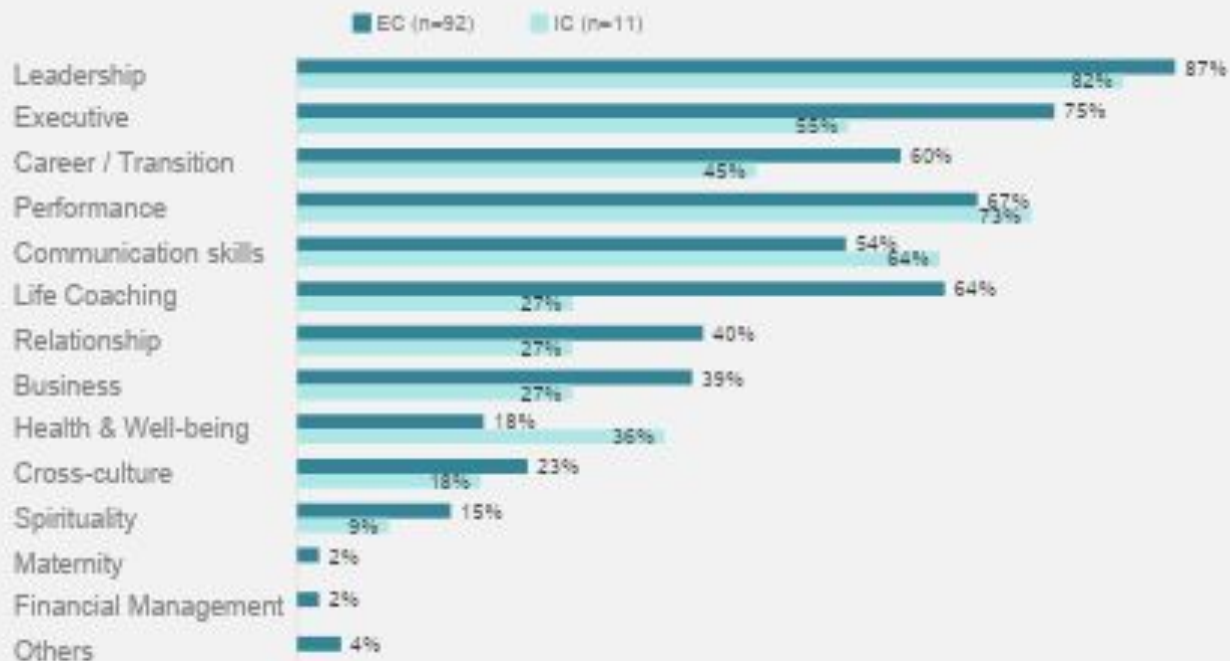
- Coaching rates range from USD 80 to 500 across the markets, with the average rate of 251
- Coaching rates are lowest in India (138), Philippines (139) followed by Indonesia (200). Average coaching rates are higher for Singapore (325) Hong Kong and Mainland China (350)
- This is by and large similar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

Something to ponder: The range of coaching rates perceived by companies seem to be higher than those quoted by coaches. Could this gap explain the reason why the coaching services are perceived as being expensive?

Coaching Specializations

Significant overlap in the areas that ICs and ECs are specializing in. Though ECs focus is more wide spread

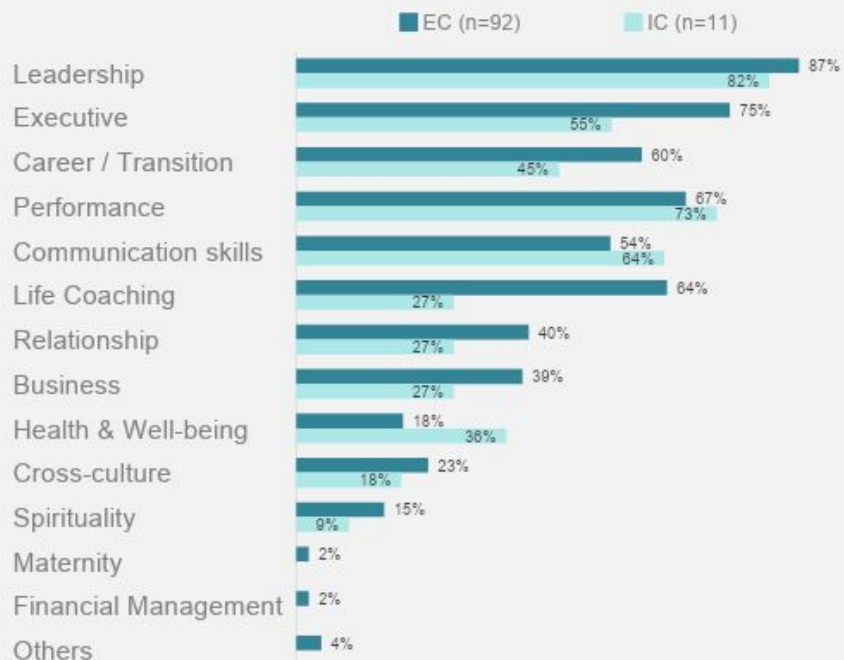
Q. What are your coaching specializations? (Multiple choice)



Coaching Specializations

Significant overlap in the areas that ICs and ECs are specializing in. Though ECs focus is more wide spread

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



- Leadership, Executive, Career/Transition Communication Skills and Performance are the top coaching specialisations. ECs are more focused on Leadership and Executive Coaching while ICs are focus is slightly more on performance coaching and communication skills.
- EC are creating new and unique niches for themselves like Life Coaching, Relationship coaching, Business coaching, Health and Wellness, Cross-culture, Spirituality, Maternity and more.

Something to ponder: As the coaching market is growing, new creative applications of coaching are becoming more prevalent as we see the emergence of new niche specializations, how do we ensure quality? How do coaches (new and experienced) stay relevant in response to competition and changing needs?

Range of Coaching & Related Services

ECs are more focused on coaching activities and consulting, however ICs relatively focus on Mentoring, Advising etc.

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

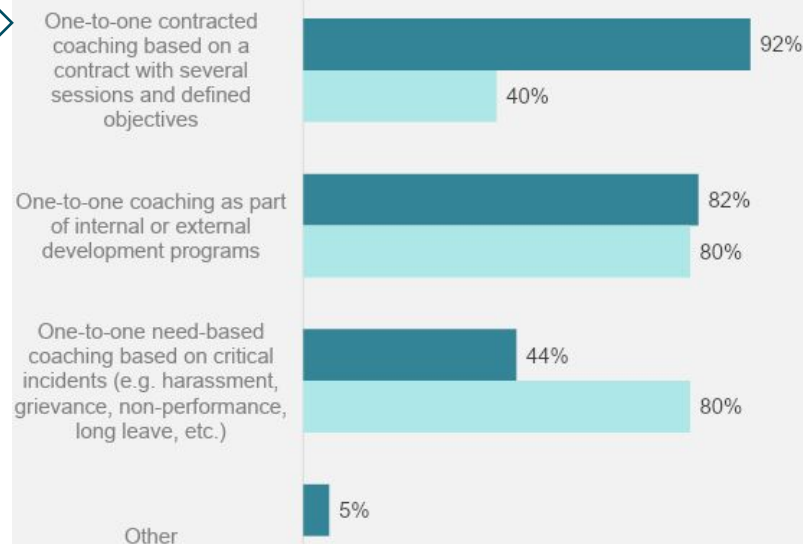
■ EC (n=97) ■ IC (n=15)



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. (Multiple choice)

■ EC (n=93) ■ IC (n=10)



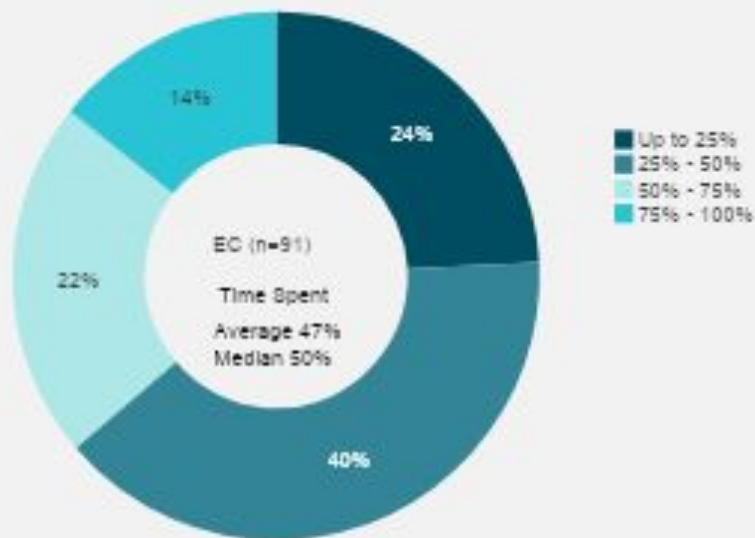
Range of Coaching & Related Services contd...

- The top four coaching services reported by coaches is one-to-one coaching, team coaching, group coaching and consulting. The extent of one-to-one coaching offered by ECs and ICs is 96% and 73% respectively.
- ECs offer significantly more one-to-one coaching (96% vs 73%) and Group coaching (58% vs 47%), ICs offer more Team coaching (67% vs 54%), advising (47% vs 32%) and counselling (40% vs 25%)
- Both ECs and ICs offer coaching skills training and mentoring to a similar extent
- This trend is similar to the 2017 survey results
- ECs offer significantly more contract-based one-to-one coaching as compared to ICs (89% vs 33%) while ICs offer more one-to-one coaching as part of development programs (92% vs 40%), which is not surprising as ICs offer coaching as part of their job role
- ICs offer significantly more need-based coaching and coaching on critical incidents like performance, harassment etc. as compared to ECs (80% vs 44%)
- One-to-one coaching as part of internal or external development programs is offered equally by both EC and IC (82% and 80%)

Proportion of Work-time Devoted to Coaching Sessions

On an average 50% of the time is spent on coaching sessions

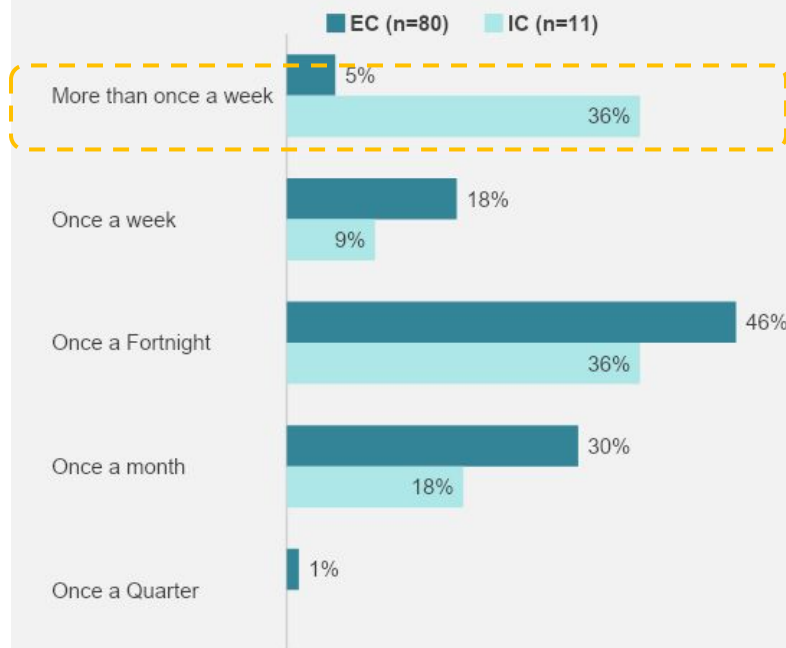
Q. What proportion of your working time is allocated to coaching sessions?



Frequency and Duration of Coaching Assignments

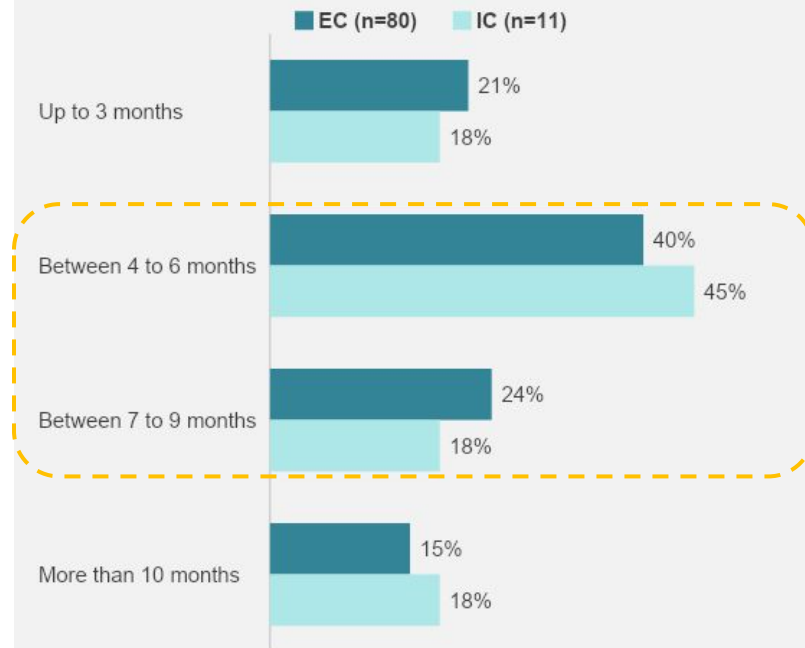
ICs do more frequent coaching assignments

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?



Frequency and Duration of Coaching Assignments contd...

- ICs deliver more than ECs, coaching sessions of more than once a week (36% vs 5%) and a large majority of these coaching assignments lasts between 4 to 9 months (63%)
- ECs deliver more than ICs, coaching sessions of once a fortnight (46% vs 36%), monthly (30% vs 18%) as well as once a week (18% vs 9%) and a large majority of these coaching assignments lasts between 4 to 9 months (64%)

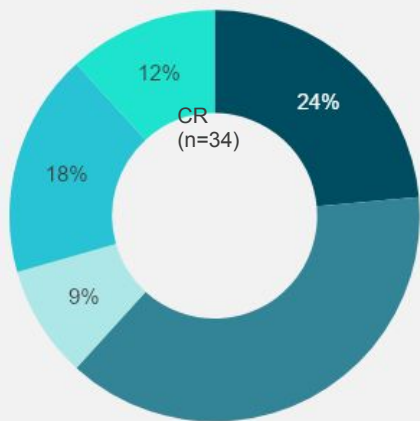
Engagement and Perception of Internal Coaches

Very high prevalence of Internal Coaches. Only 23% of companies have 100% External Coaches

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

% of Internal Coaches used

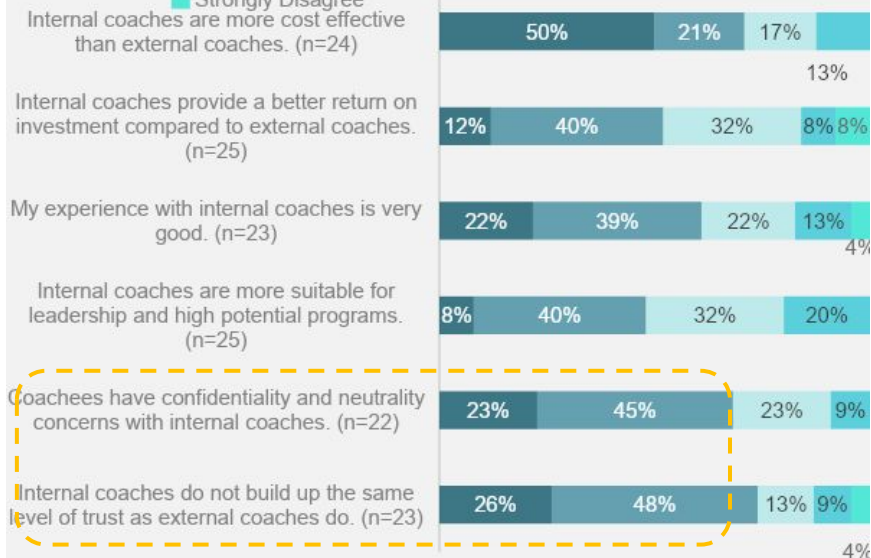
- Only External Coaches
- Up to 30%
- 31% to 60%
- 61% to 90%
- 91% to 100%



Companies are happy with Internal Coaches and find them cost effective, however Coachees have neutrality concerns

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

Strongly Agree
 Agree
 Neither Agree Nor Disagree
 Somewhat Disagree
 Strongly Disagree



Engagement and Perception of Internal Coaches contd...

- 23% of companies engage only ECs to meet their coaching needs, while 12% of the companies are almost fully dependent on ICs. Remaining 65% companies use ECs and ICs to a varying range
- 79% of the companies have indicated that their experience with ICs has been very good. Companies find ICs more cost effective (82%) and providing better ROI (64%) than ECs, but point to confidentiality & neutrality (65%) and the level of trust (57%) issues with ICs
- Interestingly, companies agree that ICs are almost as suitable for leadership and high potential development programs as ECs (48% vs 52%).
- This data pertaining to high percentages of companies using ICs to a varying extent (77%) is surprising.

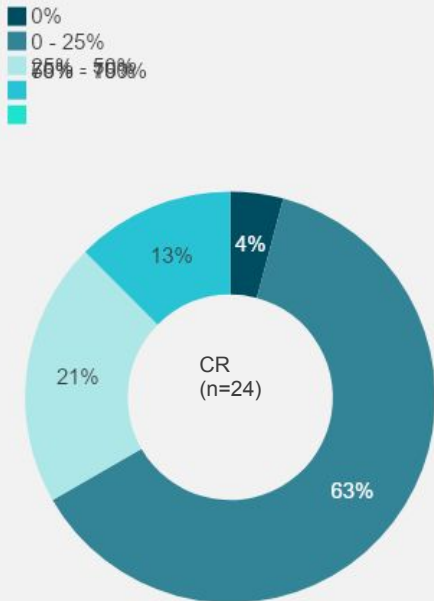
Something to ponder: With the potential of a relatively higher number of coaches engaging in internal coaching, how do companies ensure the quality of coaching and how do they tackle the neutrality, confidentiality and trust concerns?

Responsibilities of Internal Coaches

For 87% 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?

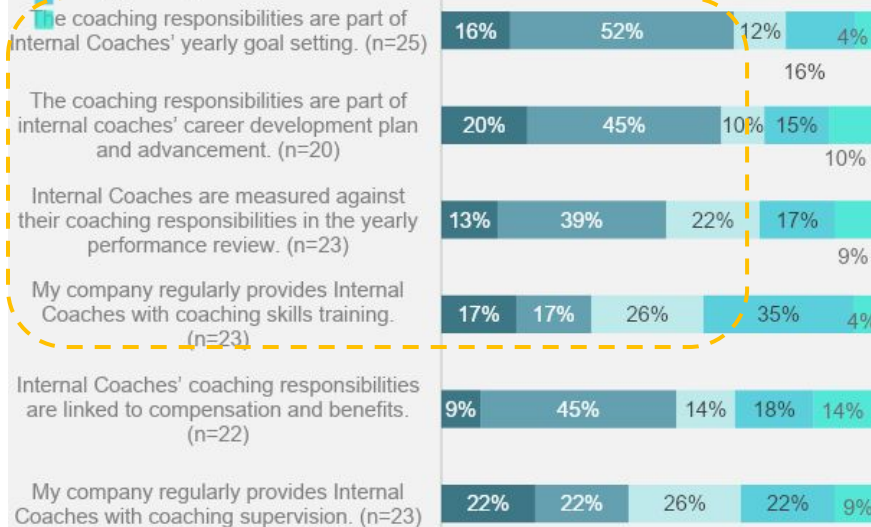
%age of internal coaches' job responsibilities dedicated to coaching activities



IC's 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?

Strongly Agree
Agree
Neither Agree Nor Disagree
Disagree/Disagree



Responsibilities of Internal Coaches contd...

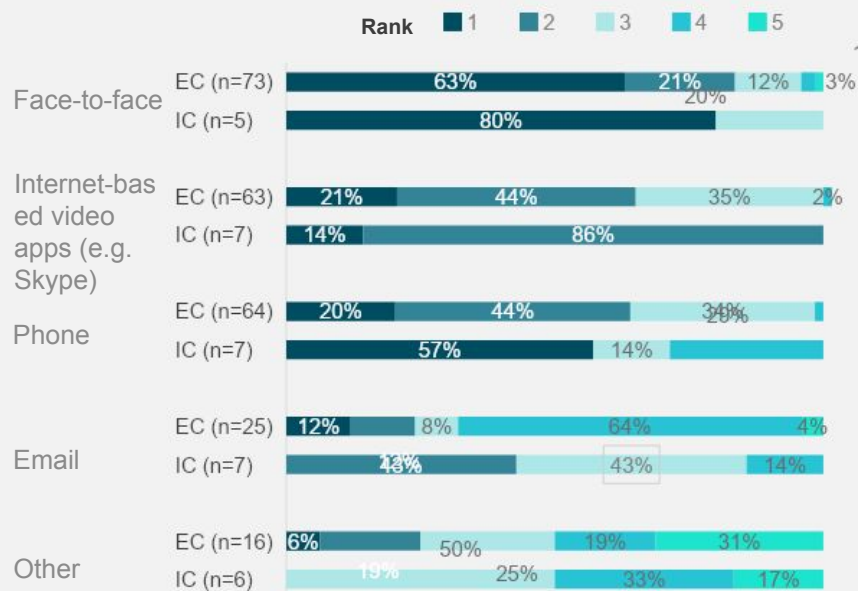
- Nearly 87% of the companies report that ICs coaching role is less than 51% of their overall job responsibility, 28% report that it is 26-50% of the job responsibility and for the remaining it is 50-100%
- IC Coaching responsibilities are a part of their annual goal setting (72%), career development plan (74%) and performance review (64%) however, coaching responsibilities are not directly linked with compensation and benefits (52%)
- 62% companies provide coaching skills training and 52% say they provide coaching supervision to the ICs

Something to ponder: As companies strive to build internal capabilities for the future, how do they see this role evolve in the overall organization?

Medium of Coaching Assignment Delivery

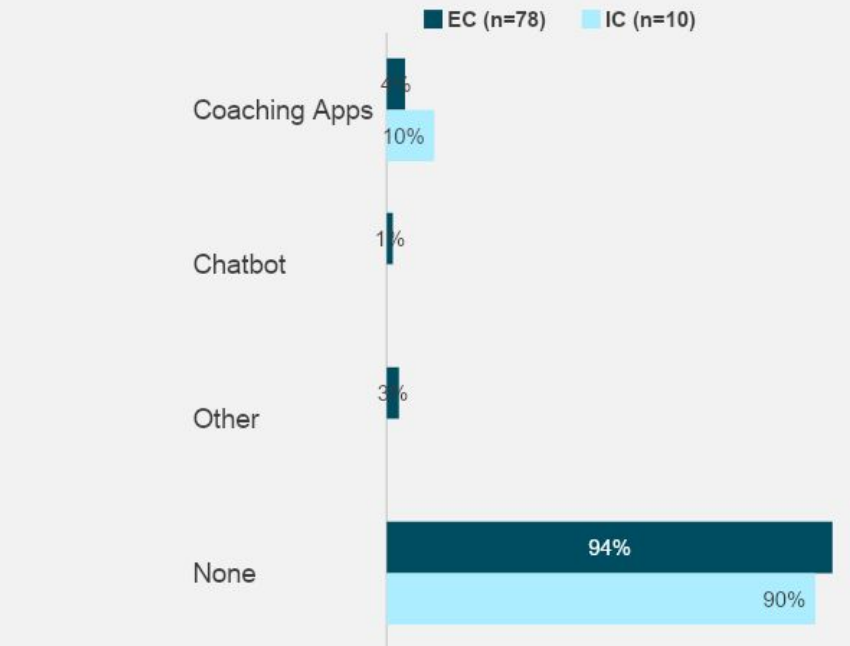
Both ECs and ICs are aligned in their medium of delivery. "Face to Face"

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



Most ECs (94%) and ICs (90%) do not use technology- or AI-based coaching tools.

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



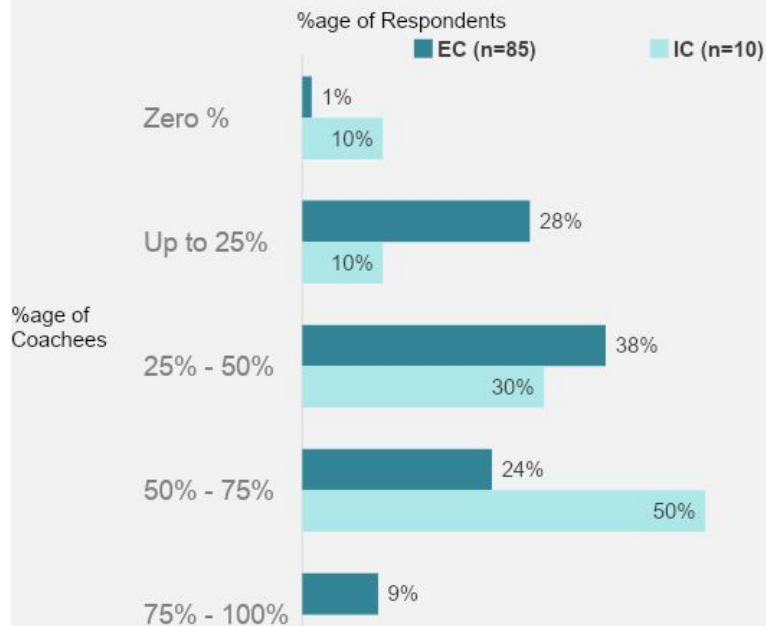
Medium of Coaching Assignment Delivery contd...

- Face-to-face in-person meeting is the most used medium for delivery of coaching. 83% ECs and 80% ICs rank it as No.1 and 2, followed by virtual face-to-face meeting via Zoom or Skype at 65% ECs and 100% ICs
- Coaching delivery by phone is also commonly used (64% ECs and 57% ICs)
- It is interesting to take note that only 4-10% coaches are using coaching apps and 0-1% coaches are using Chatbots
- 94% ECs and 90% ICs are currently not using any AI tool
- Perhaps AI has not yet extensively penetrated the coaching industry in the Indian market. It will be interesting to see how this evolves.

Profile of Typical Coachee

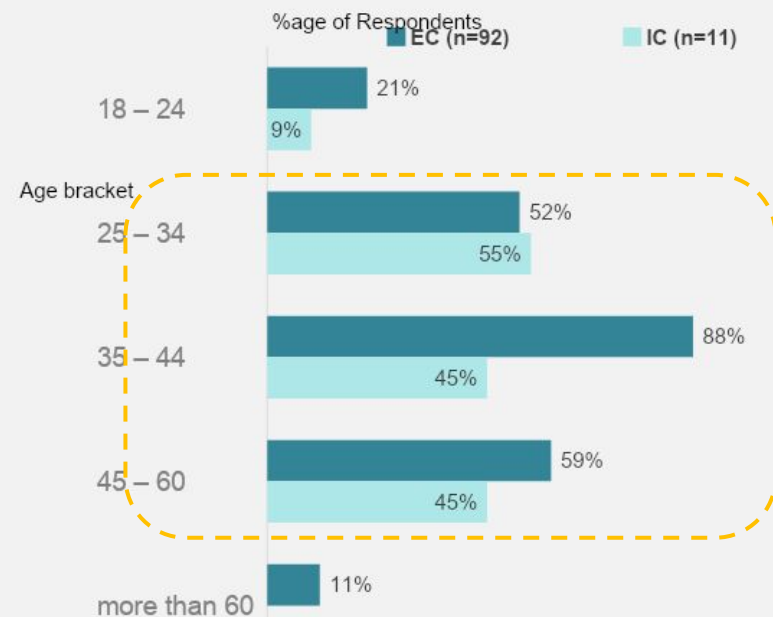
On an average 40% of the coachees are female.

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).?



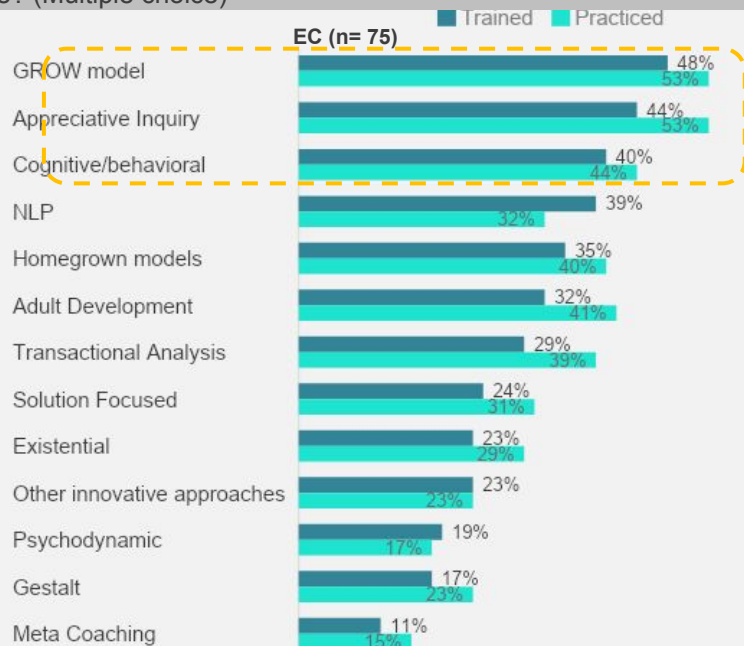
Profile of Typical Coachee contd...

- On an average, 40% of the coachees are female and 50% of the same of ICs are in the bracket of 50% to 75% whereas for ECs are 24%
- The age-range of coachees for ECs is majorly in the bracket of 25 – 60 years, with the highest being 35-44 years (88%) followed by 45-60 years (59%) whereas the age-range of coachees for ICs is also 25-60 years, with the highest being 25-34years (55%) followed by 35-44 and 45-60 years (45% each)
- ICS are coaching a younger age-group which aligns with our finding that they are coaching more junior and middle managers.
- It is also interesting to note that both EC (21%) and IC (9%) have coachees in the age-range of 18-24 years.

Coaching Models – Trained vs Practiced

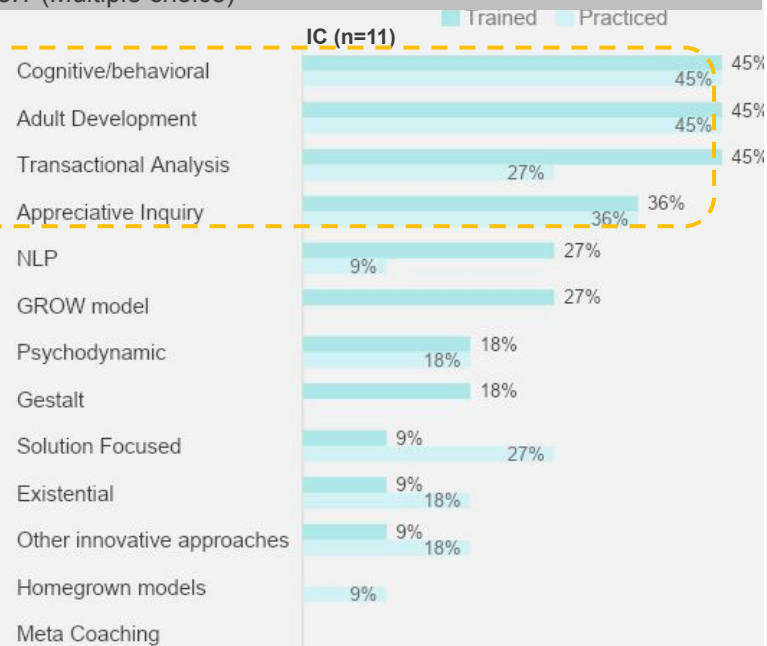
ECs used mostly well known models. There is also a divergence in NLP and Psychodynamic – in terms of Trained vs Practice

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)



Divergence in NLP, GROW and Transactional Analysis in terms of Trained vs Practiced

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)



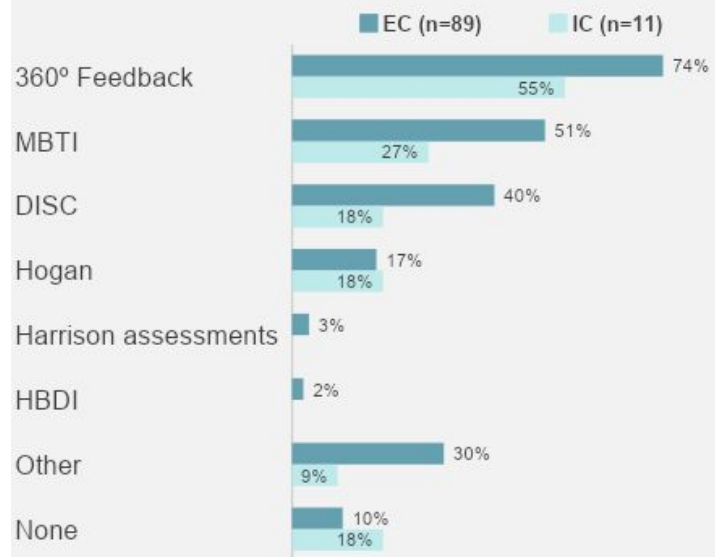
Coaching Models – Trained vs Practiced contd...

- Most used coaching models/theories reported are GROW Model, Appreciative Inquiry, Adult Development theory and Cognitive/Behavioral. 48% ECs say they have trained in GROW model and 53% say they practice it in coaching, whereas the same for ICs are 27% are trained and 0% practice it in coaching. Data for ICs however show that 45% each are trained and practice both Adult Development theory and Cognitive/Behavioral.
- There is relatively more consistency in the training and practice of coaching models and theories for ECs, while ICs experience a wider gap in what they train and practice especially in the area of NLP, Gestalt, Solution Focused and Existential theory

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?



- Majority of coaches use 360* Feedback (EC 74%, IC 55%)
- Other tools being used are, MBTI (EC 51%, IC 27%), DISC (EC 40%, IC 18%) and Hogan (EC 17%, IC 18%)
- 30% EC and 9% IC use a variety of other diagnostic tools
- 10% ECs and 18% ICs say they are not using any diagnostic tools.
- 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.

5. Coaching Beliefs and Philosophy

Understanding of Coaching

- Definition of coaching provided by professional bodies such as ICF, EMCC and others is commonly meant to be facilitation of self help. However, both companies and coaches continue to practice and include elements of guidance and knowledge transfer as part of coaching.
- When we look at the two slides below, the first one points out that 89% of the sample companies agree with the notion that coaching is facilitation. However, in the second chart, when asked if coaching should focus primarily on facilitating self help, if we just look at 'strongly agree', the percentage dropped significantly from 77% to 57% for companies and 65% for coaches.
- This leads one to infer that both companies and coaches acknowledge that there are elements other than facilitating self help in coaching (guidance, sharing expertise, recommendations), this comes out stronger from companies in the second chart.

Understanding of Coaching contd...

CR's Perception of what Coaching is:

Facilitation: 67%-89%, + Guidance: 59-69%, + knowledge transfer: 52%

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=43)

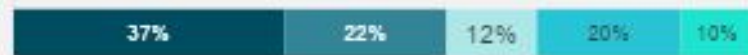


The process of assisting and guiding coachees to resolve personal, social, or psychological problems and difficulties. (N=43)

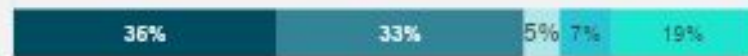


Guidance

Providing guidance focused on strategic goals. (N=41)



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



Knowledge Transfer

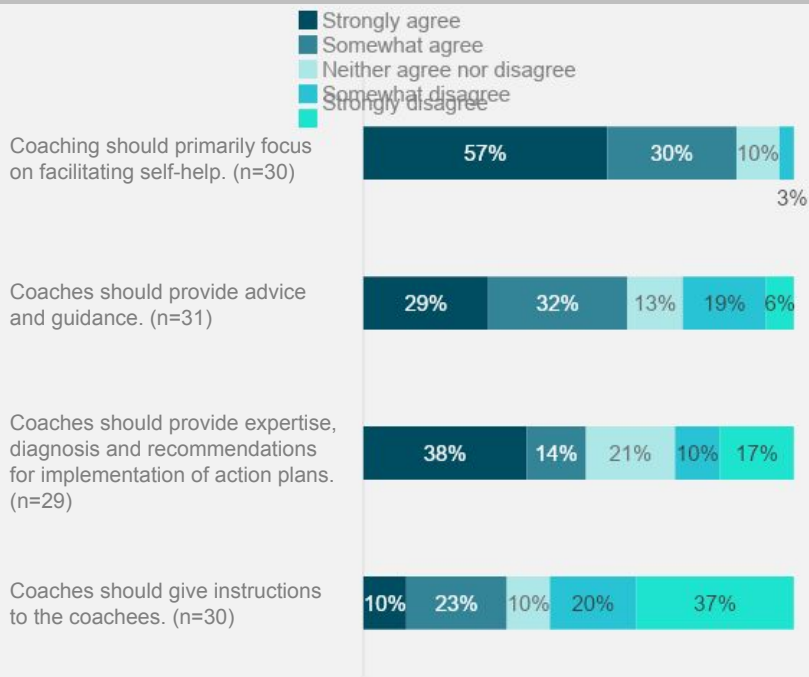
Providing expert knowledge such as providing information, solving coachee's problems, making diagnosis and recommendations for implementation, etc. (N=41)



Understanding of Coaching contd...

CR primarily agree with coaching to focus on facilitation

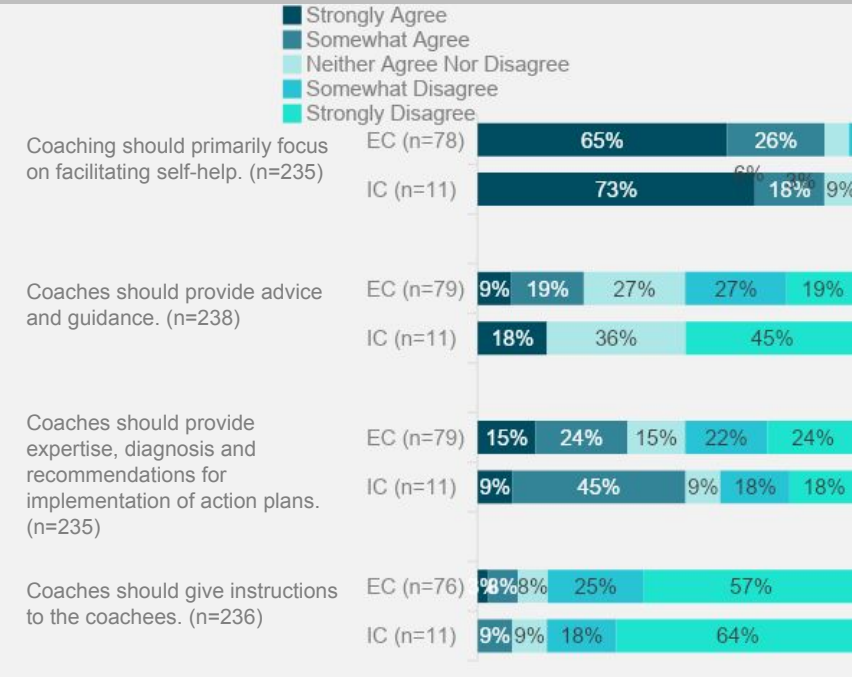
Q. Please indicate the extent to which you agree or disagree with the following statements about coaching.



ECs also agree with coaching to primarily focus on facilitation

ICs agree with coaching to focus primarily on facilitation followed by providing expertise, diagnosis and action plan implementation

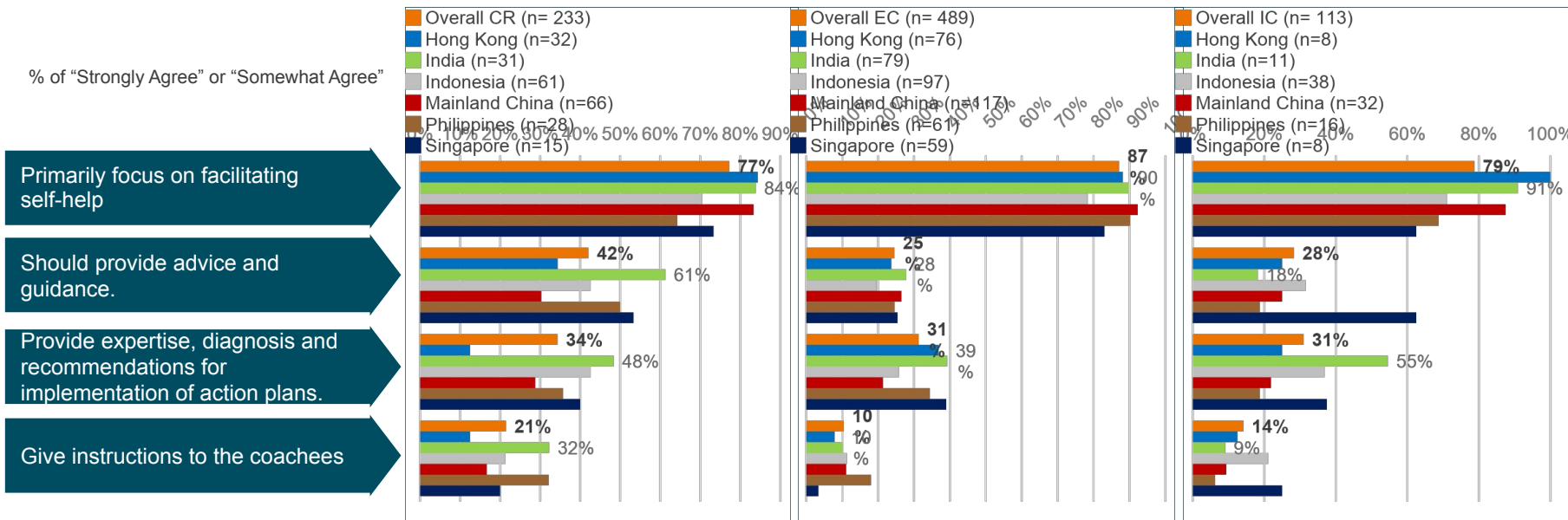
Q. Please indicate the extent to which you agree or disagree with the following statements about coaching.



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..

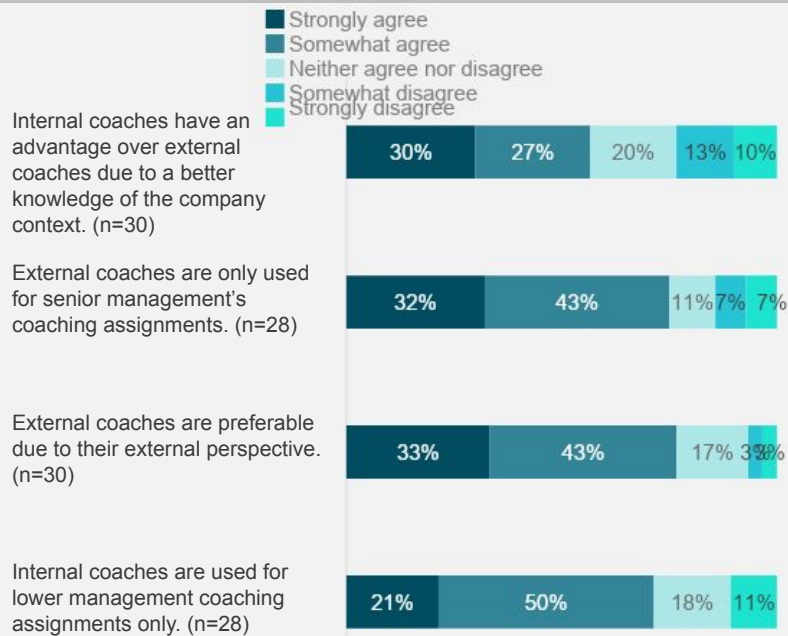


Something to ponder: Could this understanding possibly be linked with the inherent cultural values of the region that may be a result of high power distance (Hofstede's cultural dimensions)? How can we honour the unique identity and cultural values and create a unique blend of coaching that is relevant to Asia?

Beliefs About Internal and External Coaches

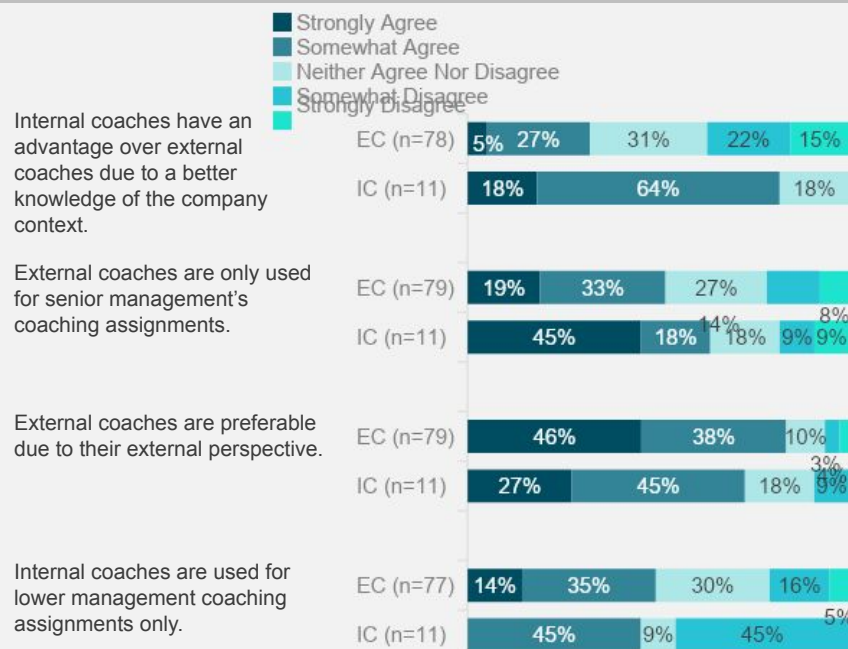
57% CR's think IC's may be good for the company, 76% prefer external coaches still due to external perspective they provide.

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



Marked differences in perceptions & preferences of EC's and IC's

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



Beliefs about Internal and External Coaches – By Market

- While 57% of CRs and 82% of ICs believe that ‘internal coaches have an advantage over external coaches due to a better knowledge of the company context’ only 5% of the ECs ‘strongly agree’ and 27% ‘somewhat agree’
- 84% of ECs believe that ‘external coaches are preferable due to their external perspective’. Only 72% of ICs (27% strongly agree) and 76% of CRs (33% strongly agree) concur with this statement
- Interestingly and curiously, there is also variance in the perception that ‘ECs are used only for senior managers coaching’, CR-75%, EC-52%, IC-63%. Similar variation between CR and EC found for lower management coaching.

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

Beliefs about Internal and External Coaches – By Market

Similar observations in perceptions of ECs, ICs and CRs across all markets

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

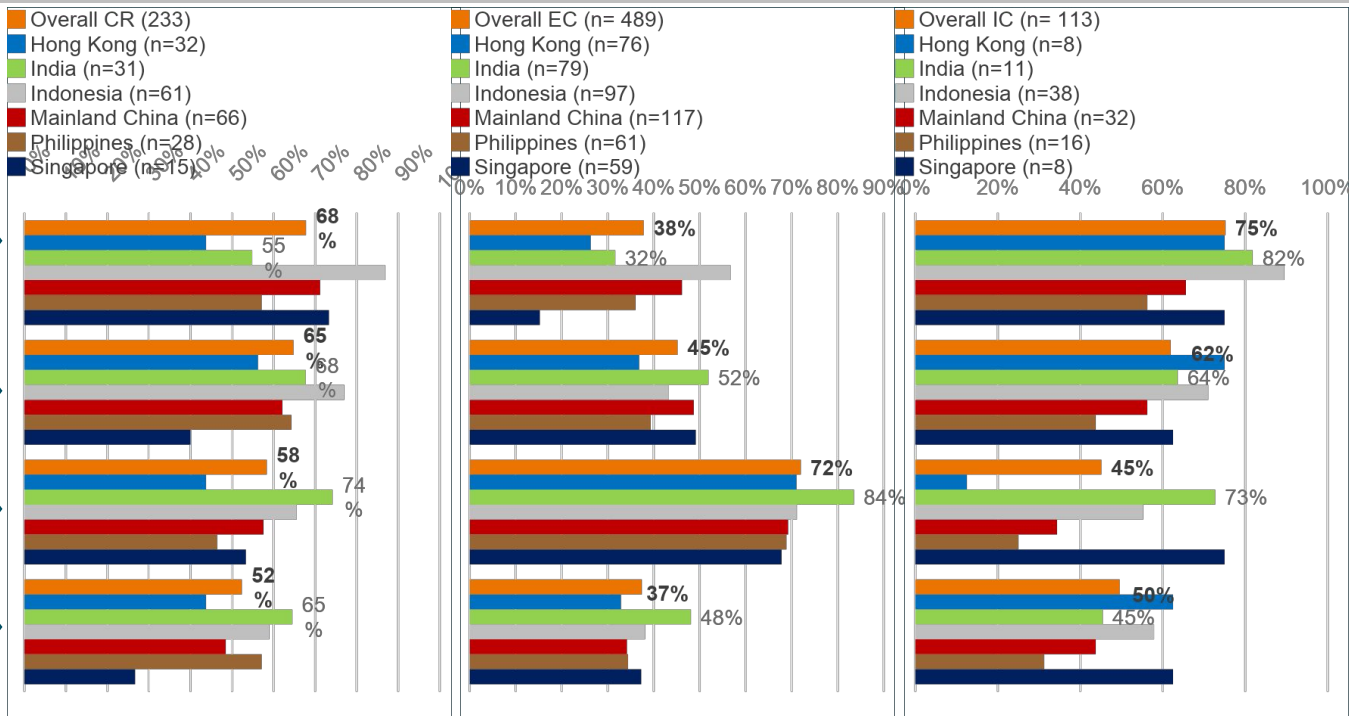
% of “Strongly Agree” or “Somewhat Agree”

Internal coaches have an advantage over external coaches due to a better knowledge of the company context.

External coaches are only used for senior management’s coaching assignments.

External coaches are preferable due to their external perspective.

Internal coaches are used for lower management coaching assignments only.



Expected Organizational Goals for coaching

Primarily used for employees' growth and development & for development of Leadership and High Potential development

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

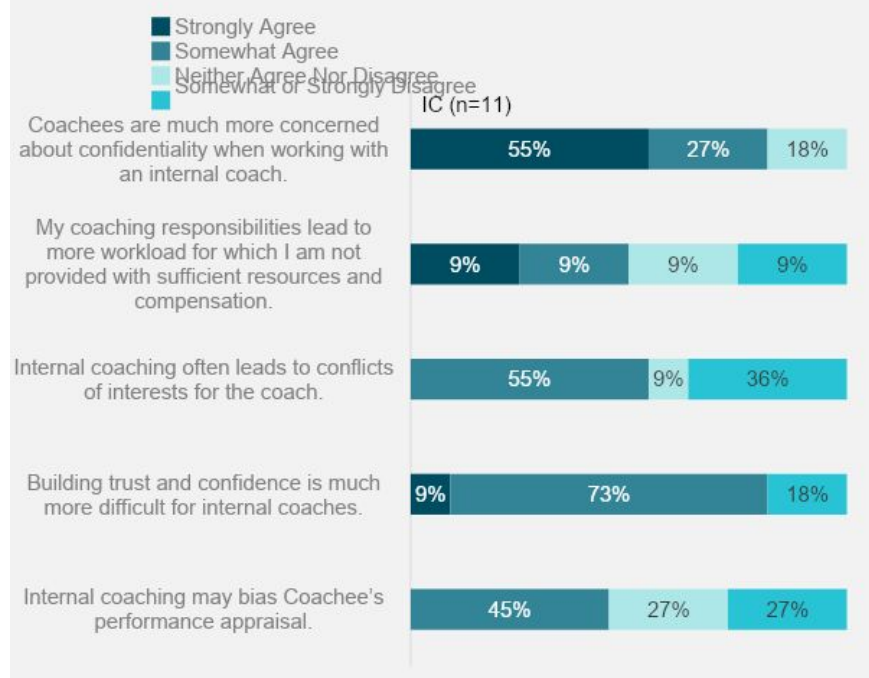


- More than 80% of coaching is primarily used for employees' growth & high potential development.
- While there is overall growth and evolution in the coaching market, one out of every two assignments still tend to be about behavioral (68%) and remedial (61%) coaching.

Opinion of Internal Coaches - Dynamics

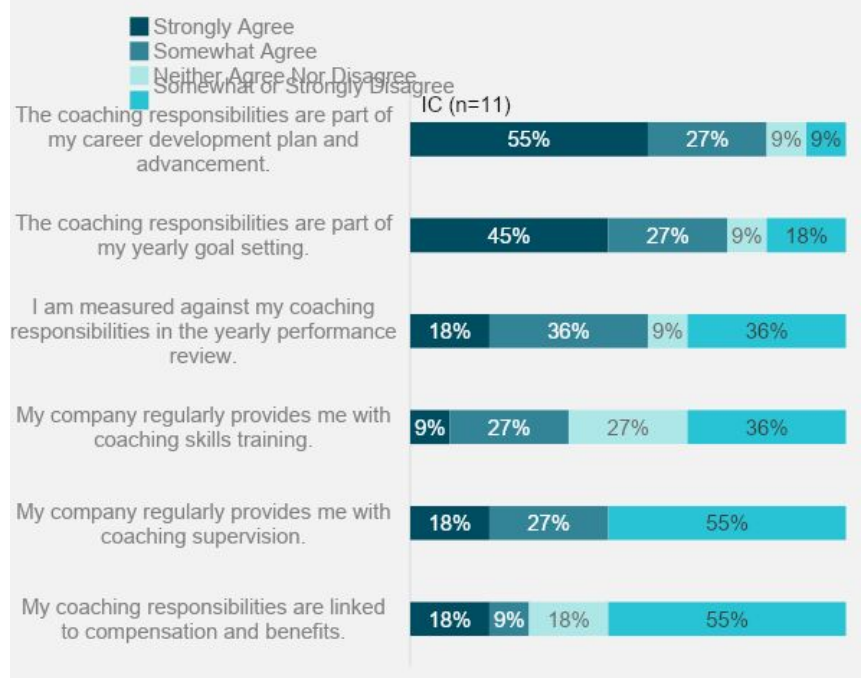
82% ICs tend to agree that confidentiality may be seen as a concern for coachees but 27% disagree that trust and bias are an issue

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



While 82% ICs tend to agree that coaching is a part of their job/development, 55% may feel it is not linked to compensation.

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



Opinion of Internal Coaches – Dynamics contd...

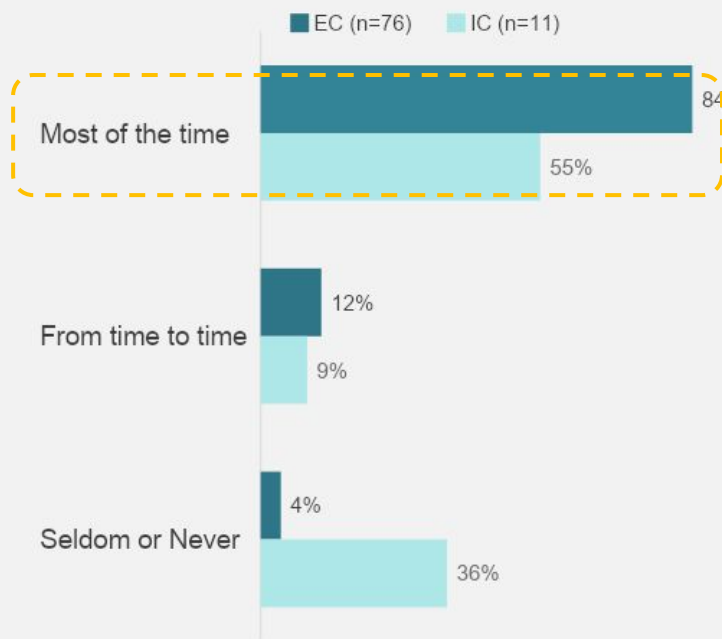
- While 82% ICs tend to agree that coaching is a part of their career development plan and advancement, 18% feel their work is not linked to their compensation and are not given sufficient resources including coaching skills training (36%)
- 82% ICs tend to agree that confidentiality may be seen as a concern by coachees, 82% agree that building trust and confidence is much more difficult. Majority of ICs agree that internal coaching leads to conflicts of interest (55%) for the coach and about half disagree that there is any bias in coachee's performance appraisal (54%).

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

Ethical Dilemmas Faced While Coaching

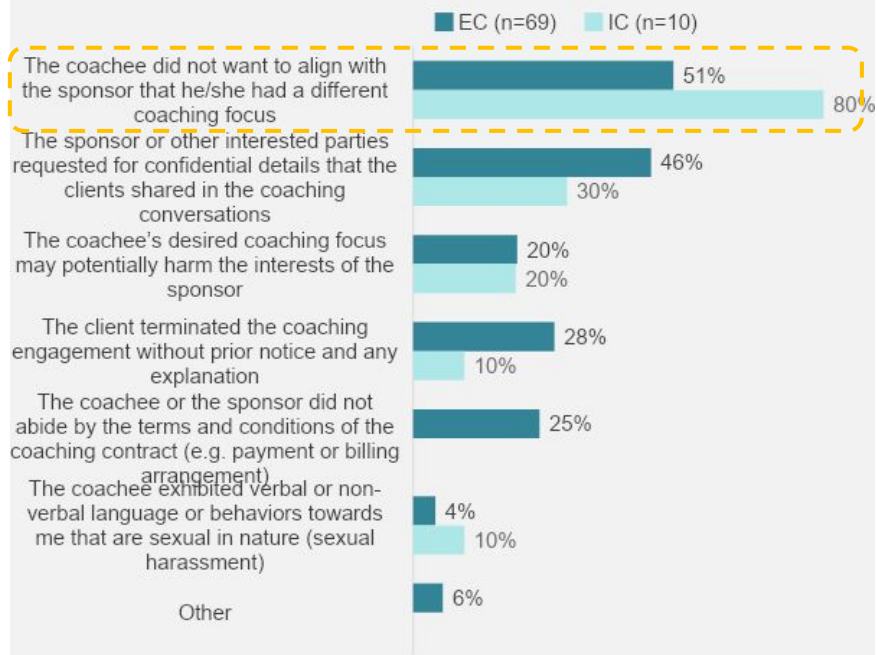
Most of the ECs & ICs share ethical code with coachees

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



Highest ethical dilemma is around difference in coaching focus of Coachee vs Sponsor

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



Ethical Dilemmas Faced While Coaching

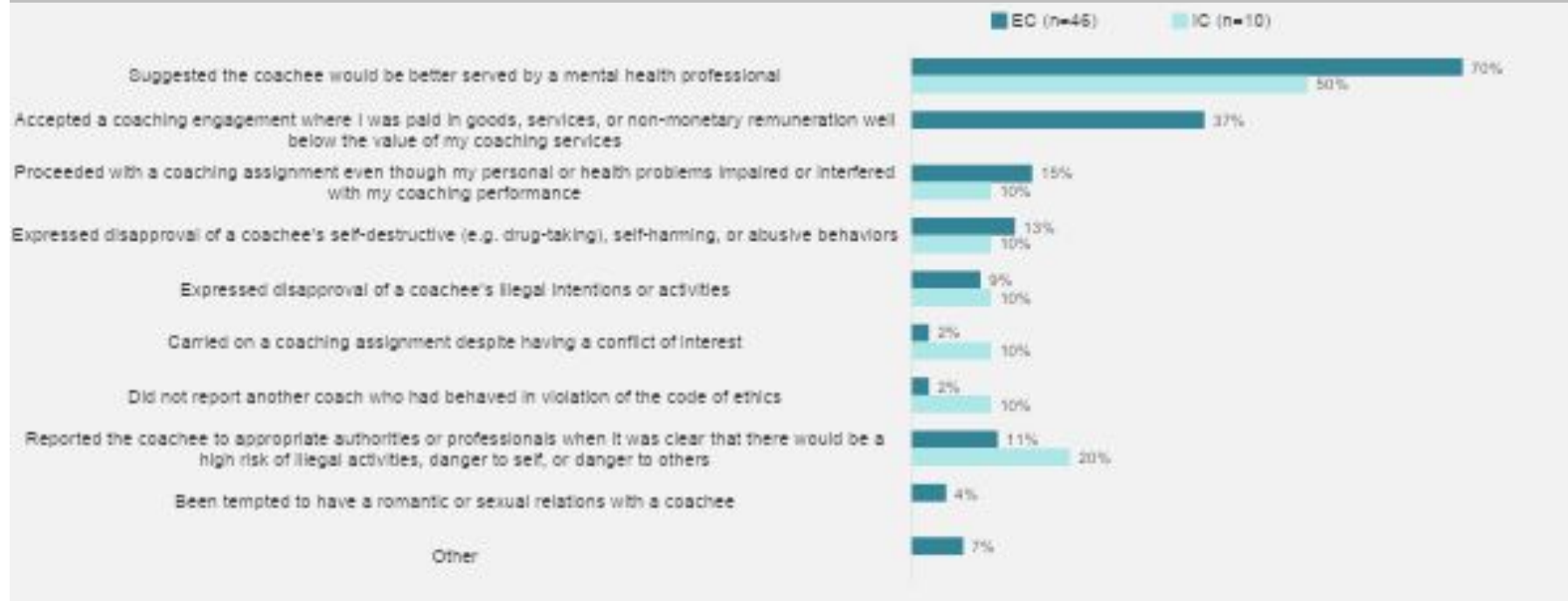
- Most of the ECs & ICs share ethical code with coaches. Highest ethical dilemma is around difference in coaching focus (ECs 52% ICs 80%) of Coachee vs Sponsor.
- 46% of ECs and 30% of ICs report having experienced situations around sharing the confidentiality of the coachee's information. ICs (10%) have faced lesser instances of premature termination of the contract than ECs (28%)

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

Difficult Situations Experienced While Coaching

Coaching can be challenging and here are some of the difficult situations experienced by the Coaches. A surprising number of coaches (EC 70%, IC 50%) have recommended a coachee for mental health professional. This speaks of the lack of awareness of mental health and/or rising cases of anxiety?

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



Difficult Situations Experienced While Coaching

- Coaching can be challenging and coaches report experiencing some difficult situations. A surprising number of coaches (EC 70%, IC 50%) say they have had to suggest that their coachee will be better served by mental health professional
- It is interesting to note the responses of ECs and ICs on two difficult situations:
 - proceeding with a coaching assignment despite personal or health problems (15% vs 10%)
 - carrying on the coaching assignment despite a conflict of interest (2% vs 10%).
 - Did not report another coach who had behaved in violation of the code of ethics (2% vs 10%)

Something to ponder: Does the high percentage referral to mental health professional speak of the rising cases of stress or a lack of awareness of mental health (both coach and coachee)? How equipped are coaches in facing difficult situations like these?

What factors could potentially cause differences in ICs and ECs response to difficult situations?

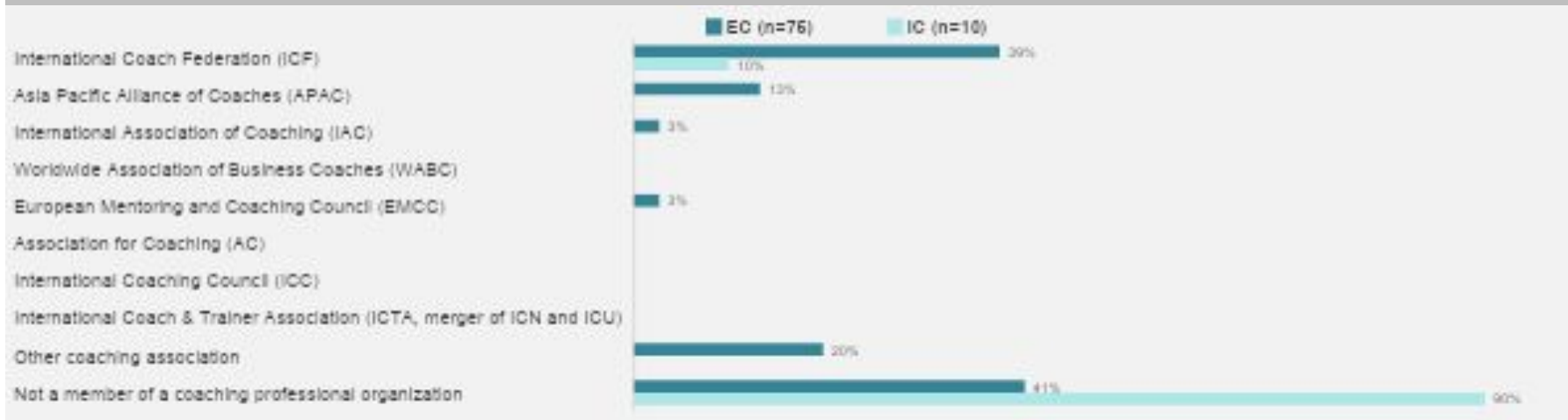
6. Coaches' Selections and Credentials

Membership of Coaching Association

39% of ECs are members of ICF

90% of IC are not member of a coaching professional org.

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



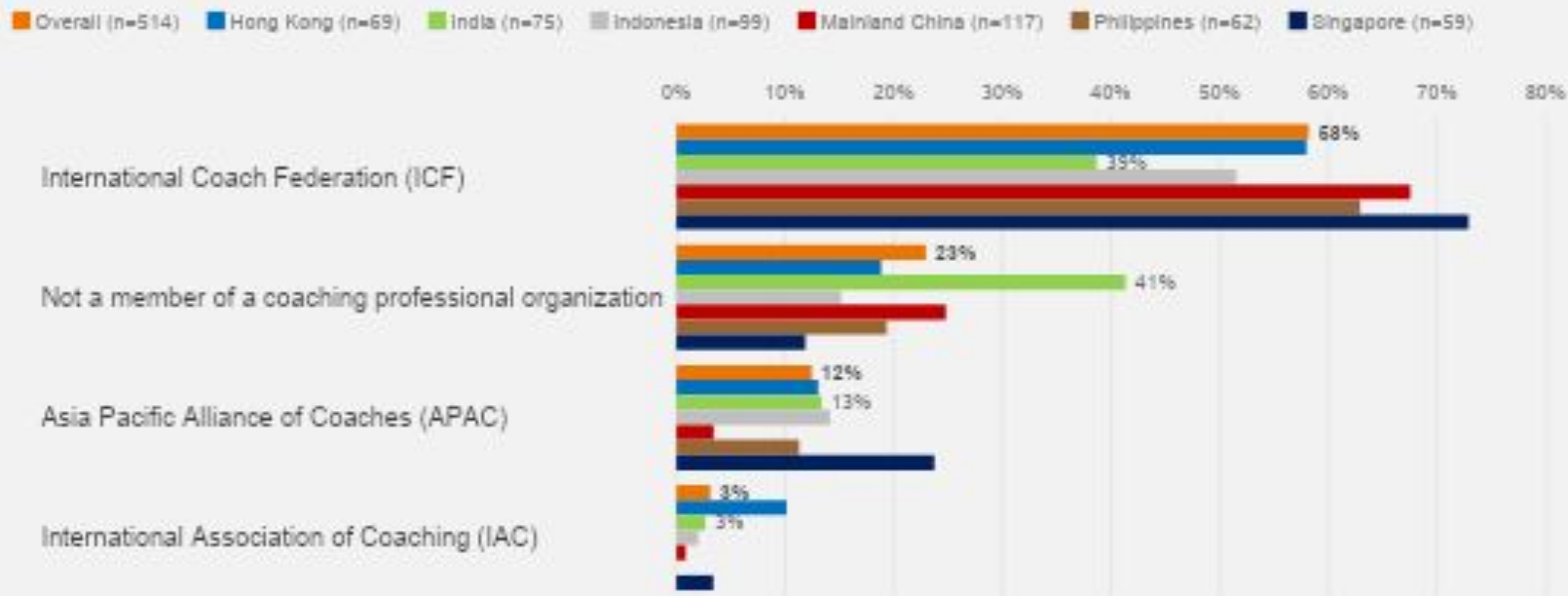
- 39% of ECs and 10% of ICs belong to ICF and there seems to be an upward trend. The rest belong to other coaching associations and among them APAC is the first runner up.
- On the other hand, 90% ICs and 41% ECs are not members in any professional coaching body.

Something to ponder: What does it take to attract more internal and external coaches to join professional coaching associations?

Membership of Coaching Association – 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)



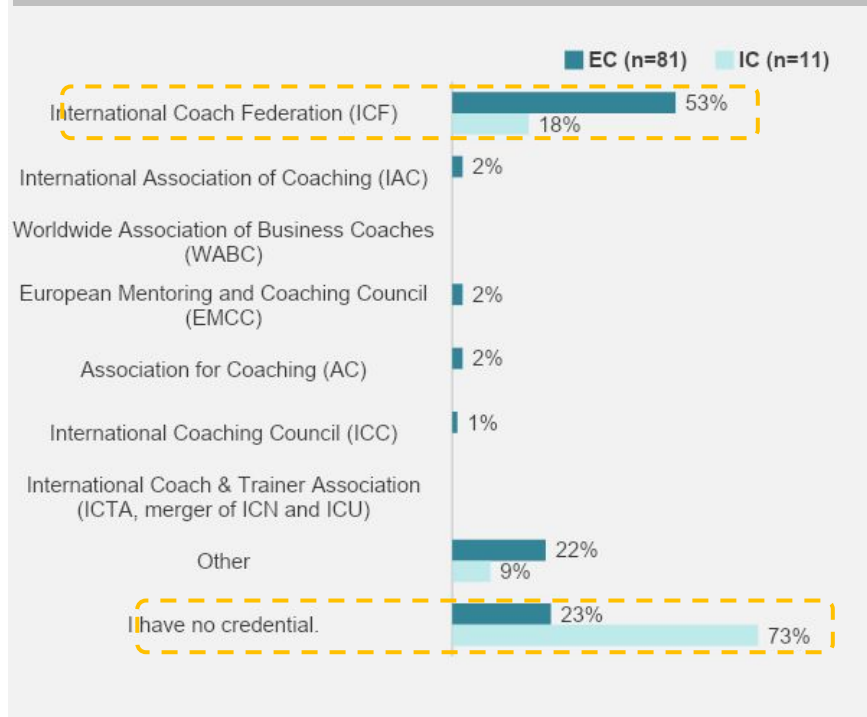
In the 2017 Survey, ICF was the leading professional coaching association with 53%, followed by APAC with 16%. 32% were not part of any coaching professional organizations.

Credentialing body

Majority of Coaches have accreditation from ICF

73% of Internal Coaches have no credentials

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



Credential Level of EC& IC by Market

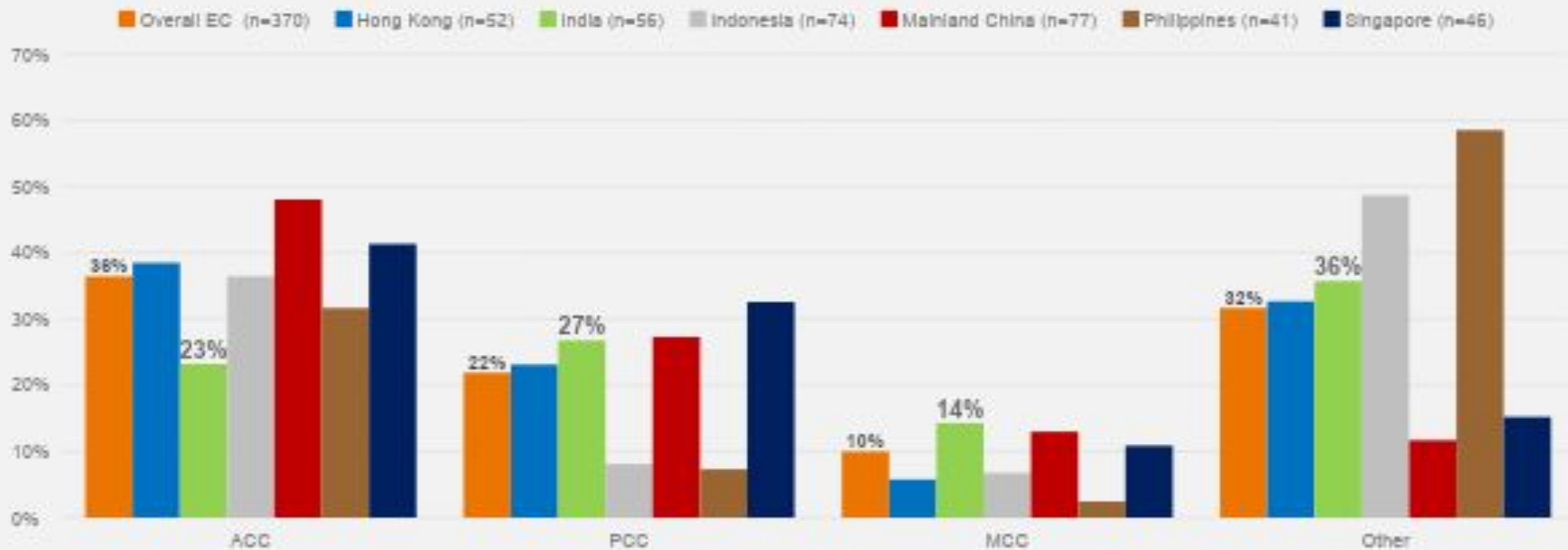
Q. What is your credential level?

EC (number)	ACC	PCC	MCC	Other	Total
Hong Kong	20	12	3	17	52
India	13	15	8	20	56
Indonesia	27	6	5	36	74
Mainland China	37	21	10	9	77
Philippines	13	3	1	24	41
Singapore	19	15	5	7	46
Other	6	9	5	4	24
IC (number)	ACC	PCC	MCC	Other	Total
Hong Kong	2	0	0	2	4
India	0	1	1	1	3
Indonesia	4	0	0	15	19
Mainland China	3	3	0	6	12
Philippines	4	1	0	1	6
Singapore	2	2	0	0	4
Other	0	0	0	2	2

EC Credential Levels

A fair number of coaches have received non ICF credentials - majority of coaches in the Philippines and Indonesia

Q. What is your credential level?

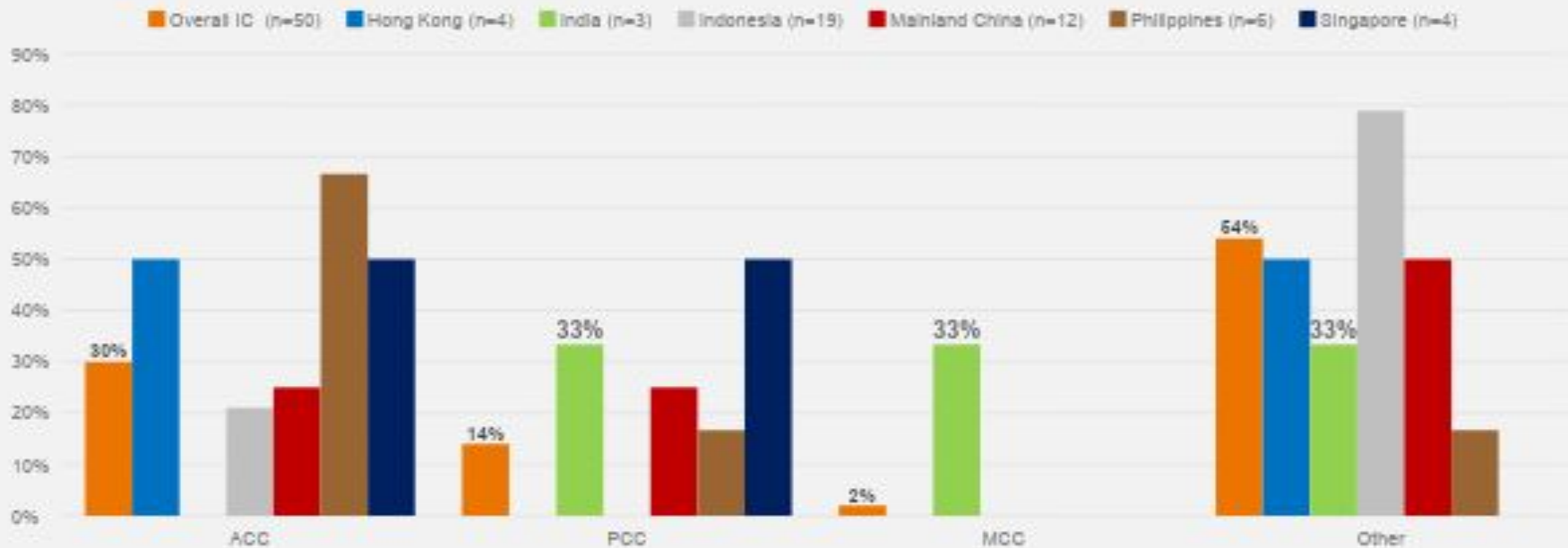


In the 2017 Survey, about 50% of coaches in India and China are accredited at PCC level while the majority of accredited coaches in HK have ACC credentials.

IC Credential Levels

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

Q. What is your credential level?

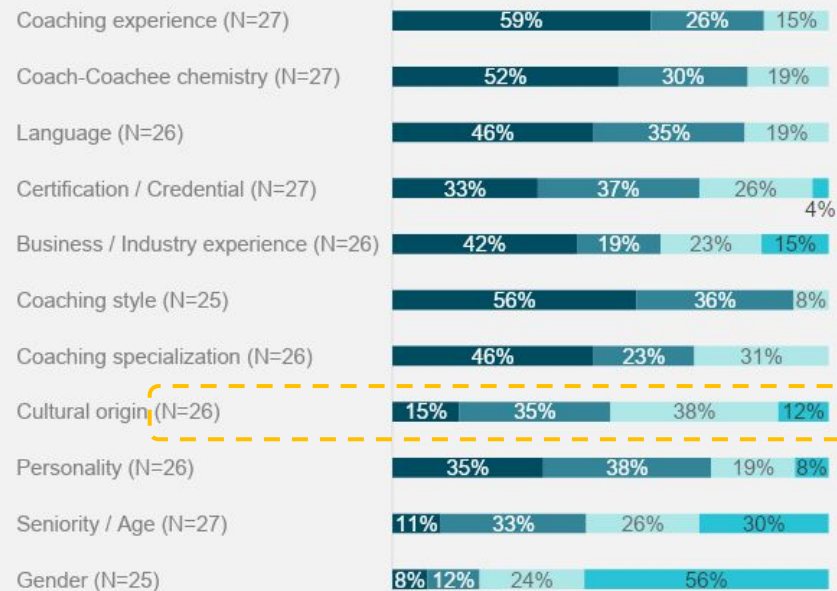


Criteria for Hiring & Selecting External Coaches

Companies and EC are aligned on the criteria for selection of external coaches. Other than Gender, all criteria are important. There is some divergence on "Cultural Origin" expectations

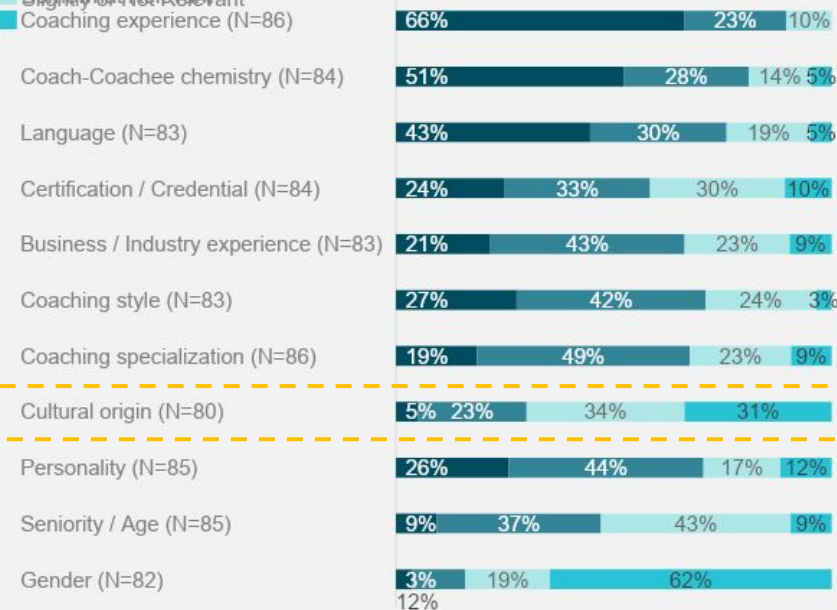
Q. How relevant are the following criteria when selecting external coaches? (Company Representatives)

■ Totally Relevant ■ Mostly Relevant ■ Somewhat Relevant ■ Slightly or Not Relevant



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

■ Totally Relevant ■ Mostly Relevant ■ Somewhat Relevant ■ Slightly or Not Relevant



Criteria for Hiring & Selecting External Coaches contd...

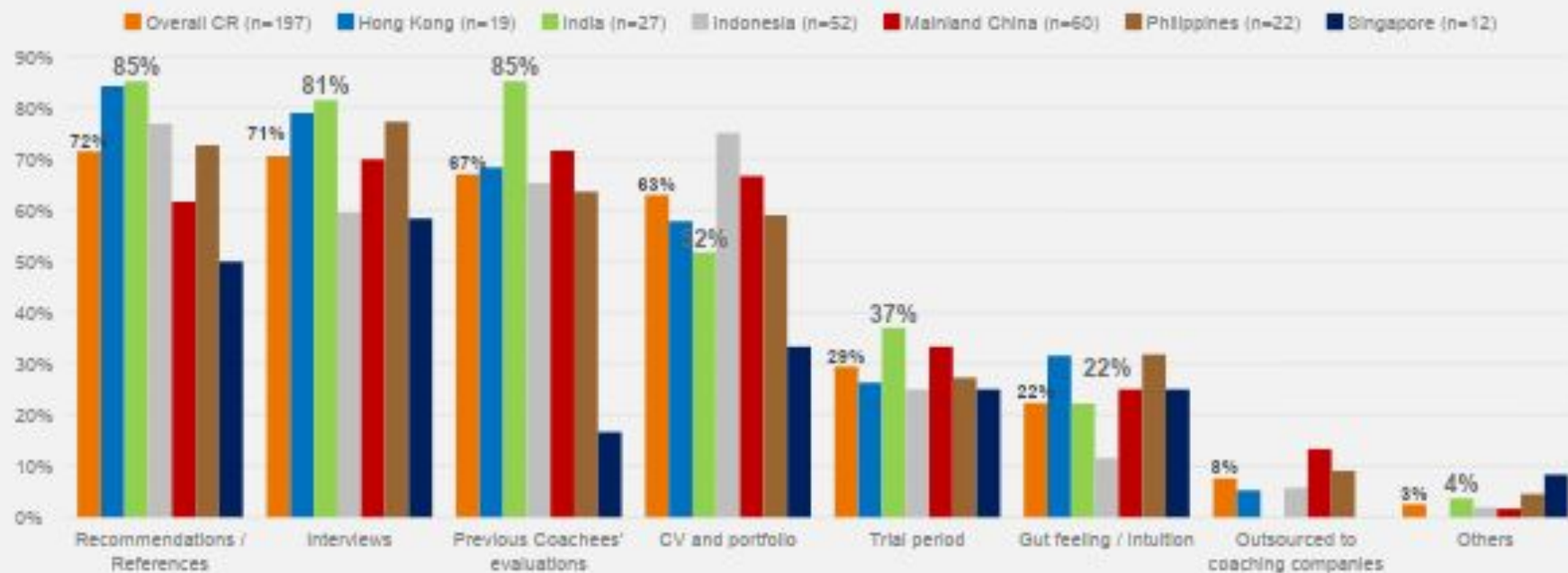
- Companies and ECs are aligned on the criteria for selection of coaches. Top four selection criteria are Coaching Experience, Chemistry, Language and Credentials. Other than Gender, all criteria are seen as important.
- There is some divergence on Cultural Origin expectations; companies seemed to see it as more relevant than coaches.
- In 2017, coaching experience was also the number one selection criteria and credentials were seen as far more important by companies (ranked no 2) than by ECs (ranked no. 7).
- In 2019, both companies and coaches have ranked credentials at no.4

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

Assessment of External Coaches

Top 2 external coach assessments for all markets: Recommendations/References and Previous Coachees' Evaluations

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

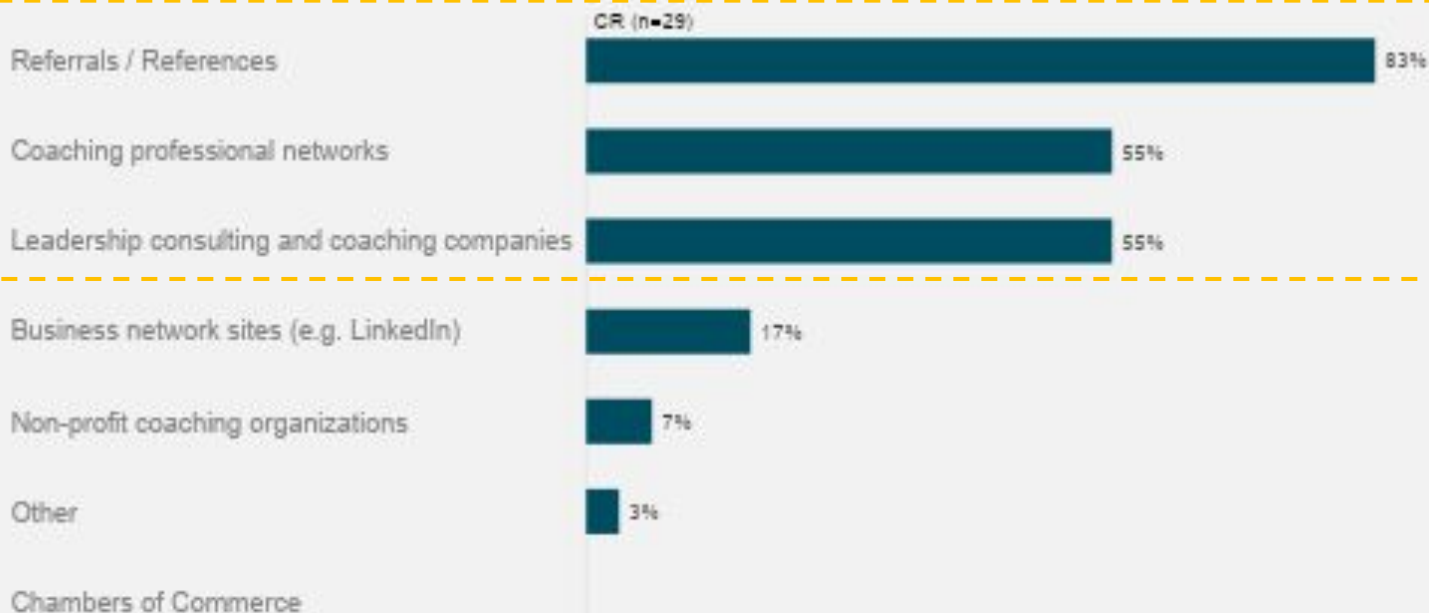


In the 2017 Survey, organizations brought out interviews, coaches' CV and portfolio and the feedback from coachees as main tools for assessing EC.

Channels for Hiring External Coaches

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

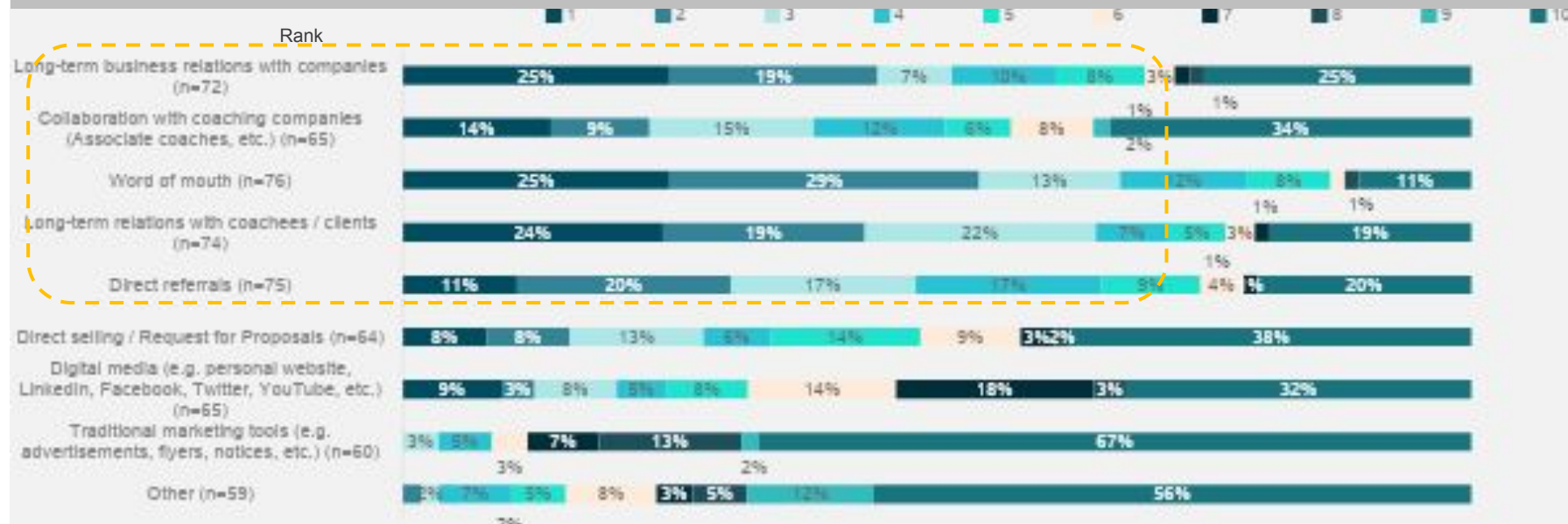
Q. Which channels do you use to recruit external coaches? (Multiple Choice)



Channels for Hiring External Coaches

Top five channels include Relationships with Clients & Coachees, Collaboration with Coaching Companies, 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)

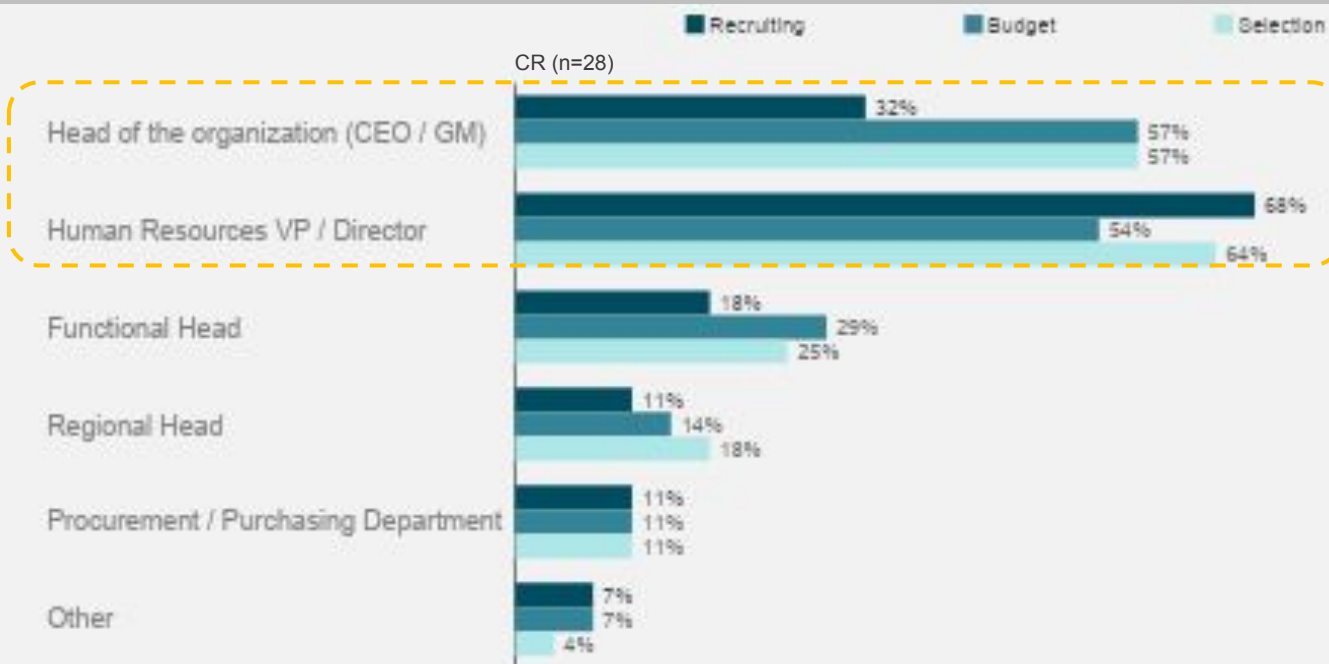


Something to Ponder: Since winning coaching assignments relies mainly on long-term relationships and word-of-mouth referrals, how can new coaches find entry into a relationship based coaching market? What channels could they use to market themselves?

Decision Makers For Coach Recruitment

While CEO/GM are involved for Budget, Recruiting and Selection is primarily decided by HR Head

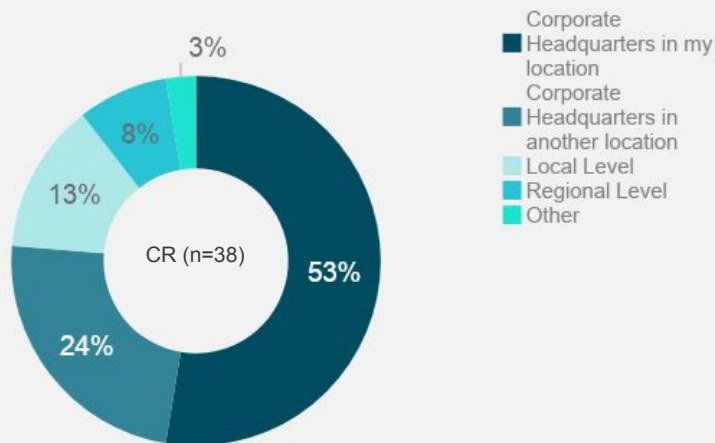
Q. Who is involved in the external coaches' recruitment process? (Multiple Choice)



Setting up Coaching Assignments

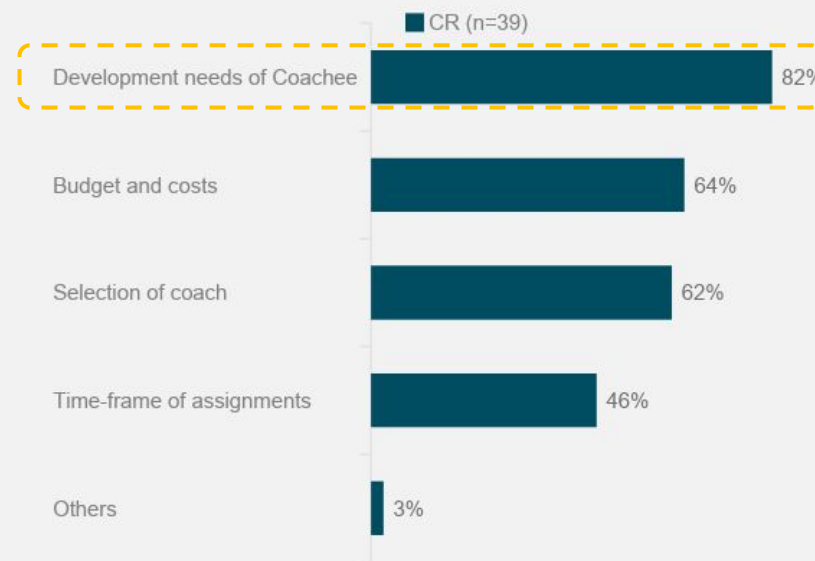
77% of decisions are made either at HQ in Coaches' Location or at Local Level

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



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

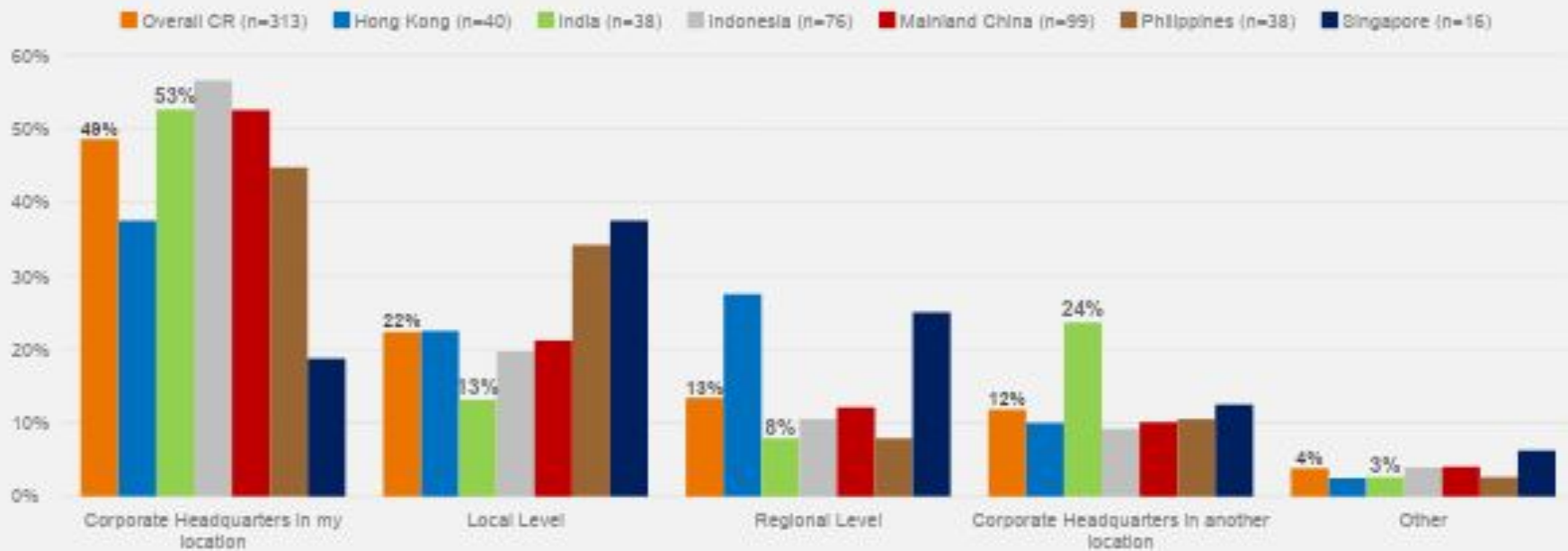
Q. Please indicate the areas that are considered when setting up coaching assignments. (Multiple Choice)



Setting up Coaching Assignments – By Market

While most of the locations reported Corporate HQ to be decision maker, Singapore has reported Local Level decision making.

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

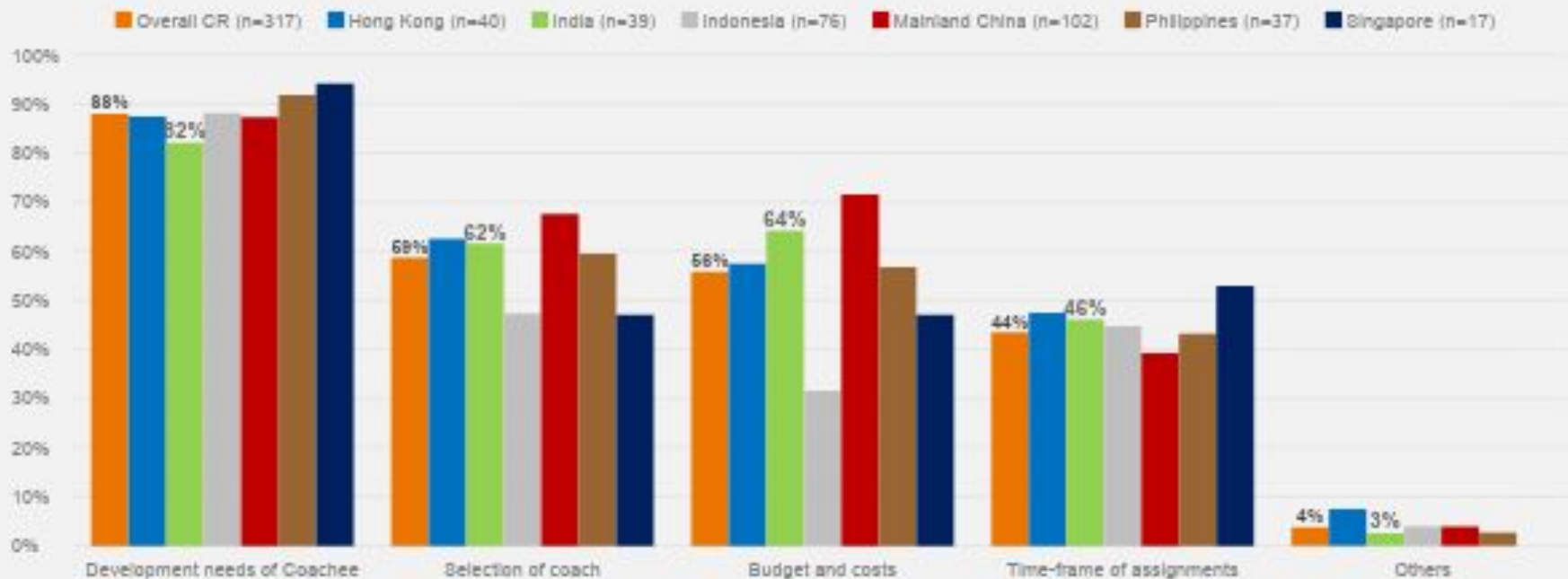


In the 2017 Survey, similar observation where Corporate headquarters were mainly responsible for setting up the coaching process

Setting Up Coaching Assignments – By Market

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)



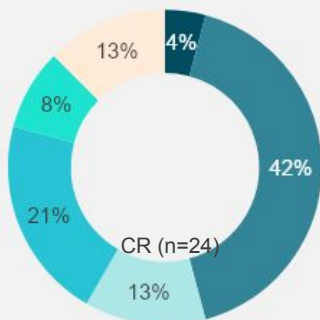
In the 2017 Survey, "Time-frame of assignments" and "Selection of Coach" were the two most important factors respectively.

Origin of Coaches

The local pool of coaches has opportunity to seep into the market and replace overseas coaches.

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

None
0 - 25%
25% - 50%
50% - 75%
75% - 100%



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



- Roughly 1/2 of the companies (58%) are using 50% or less of local coaches and at least half or more of the ECs are of the same cultural origins as the market that they were employed
- This also links to an earlier question on selection criteria where companies report that coaches' cultural origin is more relevant to them than to ECs

Cultural Origins of ECs

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

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

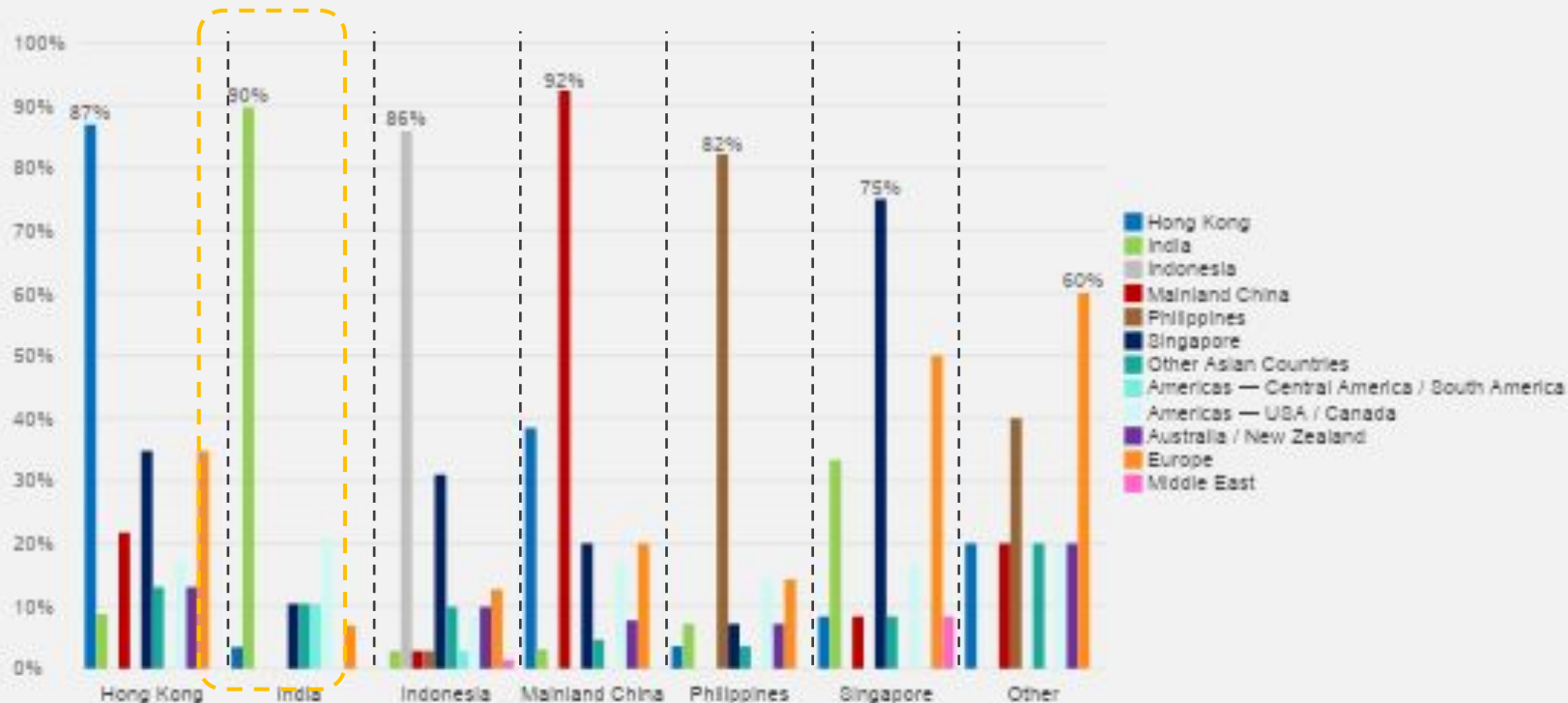
2nd Highest selection

3rd Highest selection

Cultural Origins of ECs

Local pool of Coaches is the most popular in all Markets

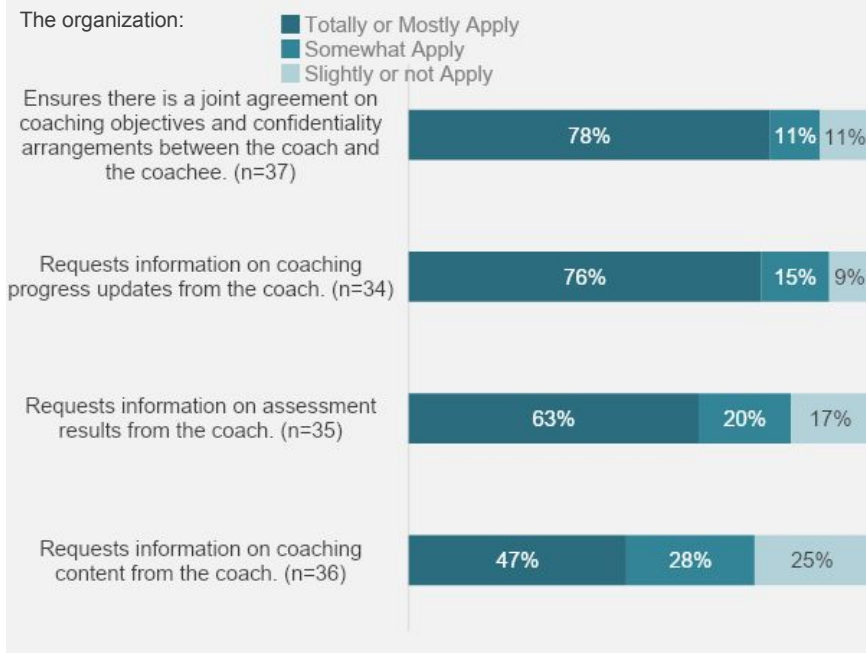
Q. Please select the top three cultural origins of your external coaches.



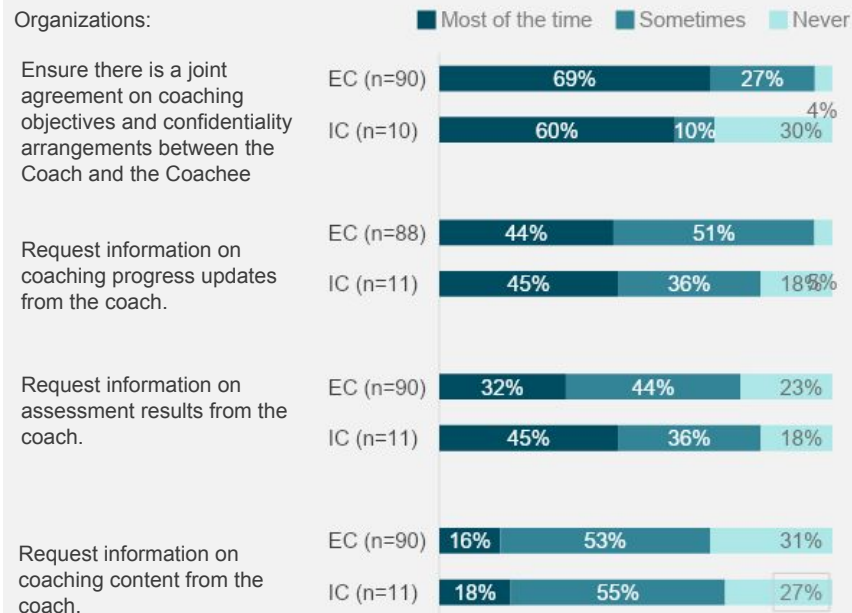
Coaching Process Setup

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

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



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



Coaching Process Setup contd...

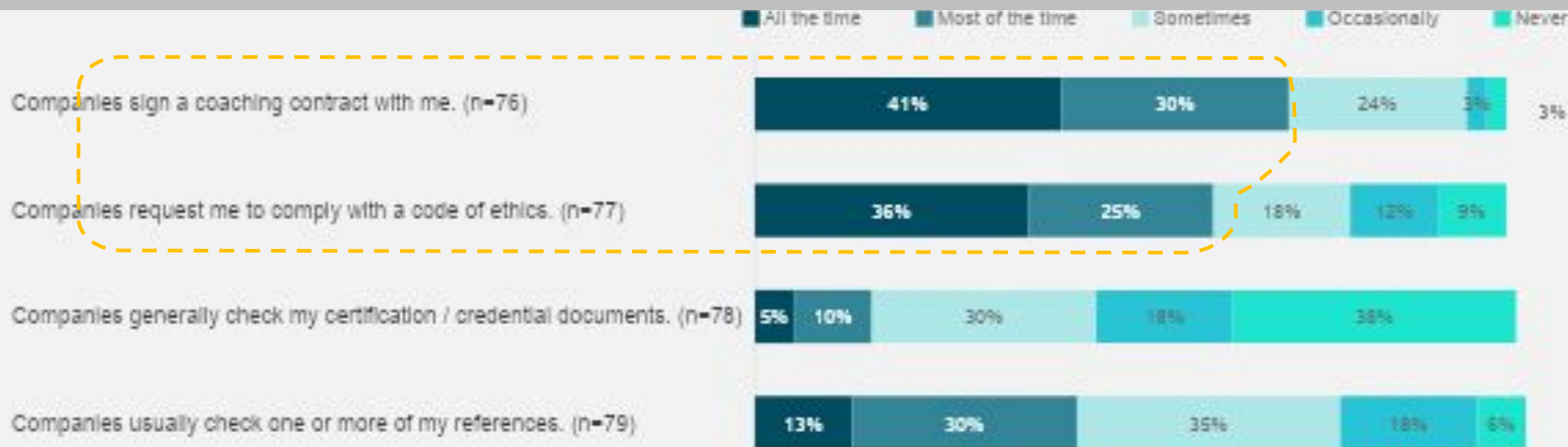
- While it is encouraging that a majority of companies and coaches indicated there are joint agreements on coaching objectives and confidentiality arrangements and requests for coaching progress updates, a majority also indicated that companies request for coachees' assessment results and coaching content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

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

Process Compliance by Organizations

High level of compliance required by organizations

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

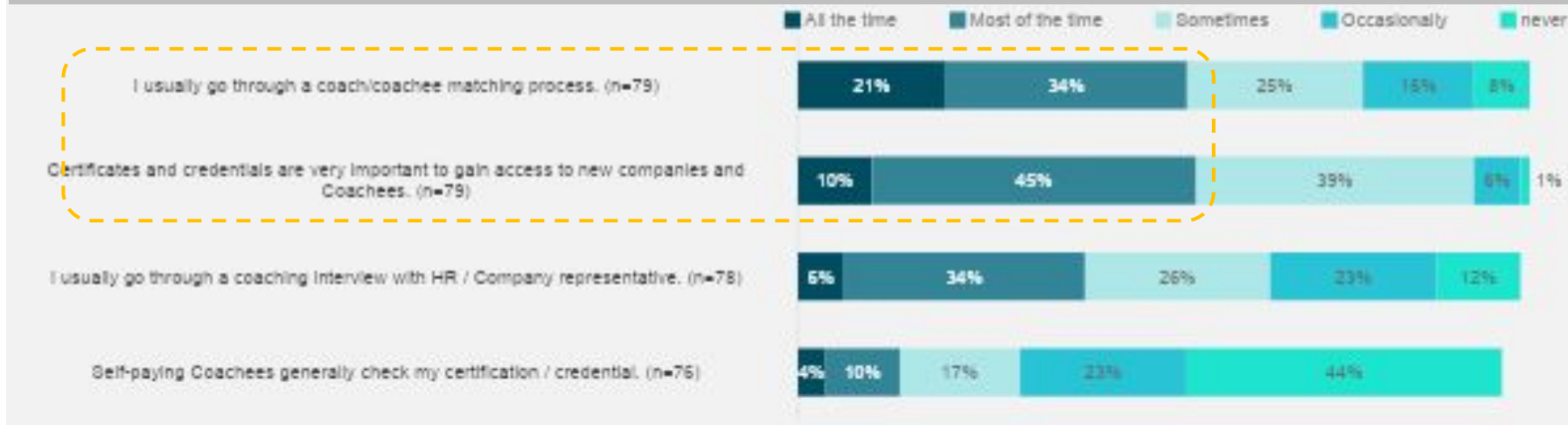


- According to coaches, majority of companies comply with signing of coaching contracts and requesting ethics compliance, while they seem to be paying less attention on checking coaches' credentials and references.

Coaching Process Practices

Certificates and credentials seems to be more important for companies than self paid individuals. Most go through a coach/coachee matching process

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



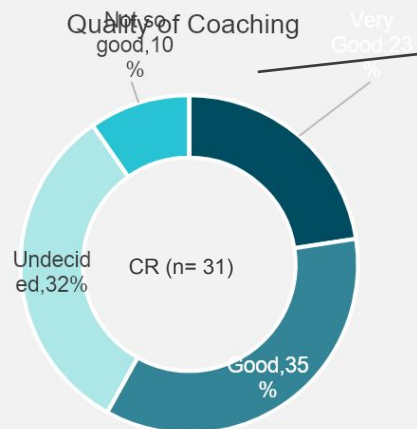
- Majority of coaches claimed that they would usually go through a coach/coachee matching process and expressed that certificates and credentials are very important to gain access to new companies and coachees. Self paying coachees seem to care less about checking on credentials and certification of coaches.

7. Coaching Evaluation and Diagnosis

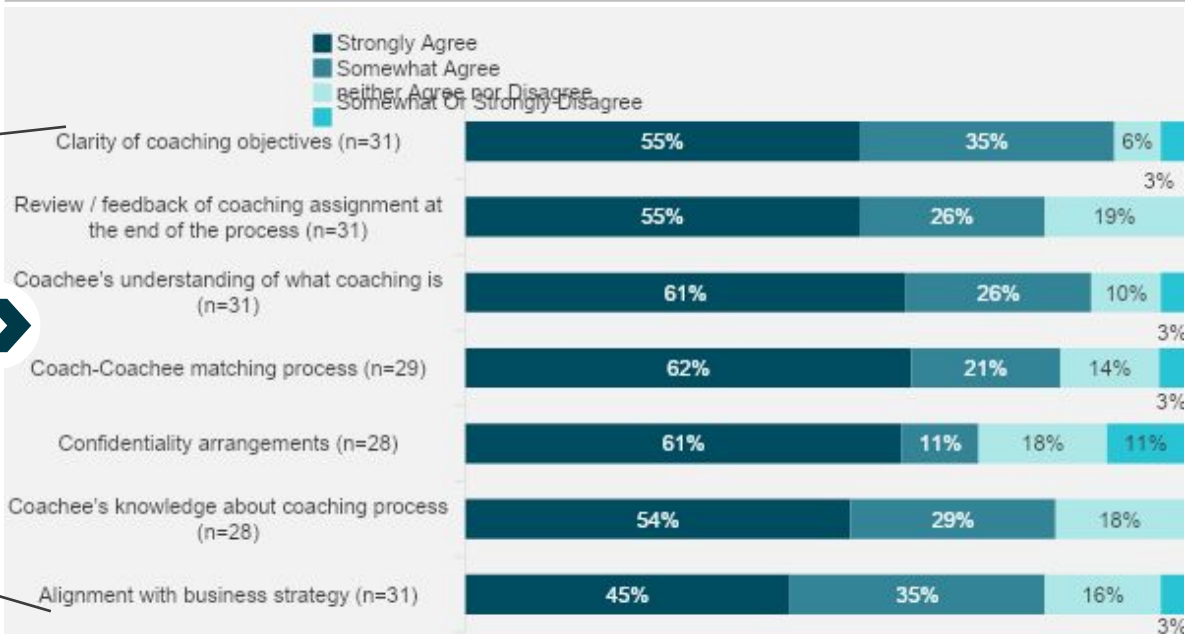
Evaluation of Coaching Quality

32% of organizations are undecided on the quality of Coaching. It brings out scope for improvement and Organizations have advised to focus on almost all factors listed below to improve the coaching process

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?



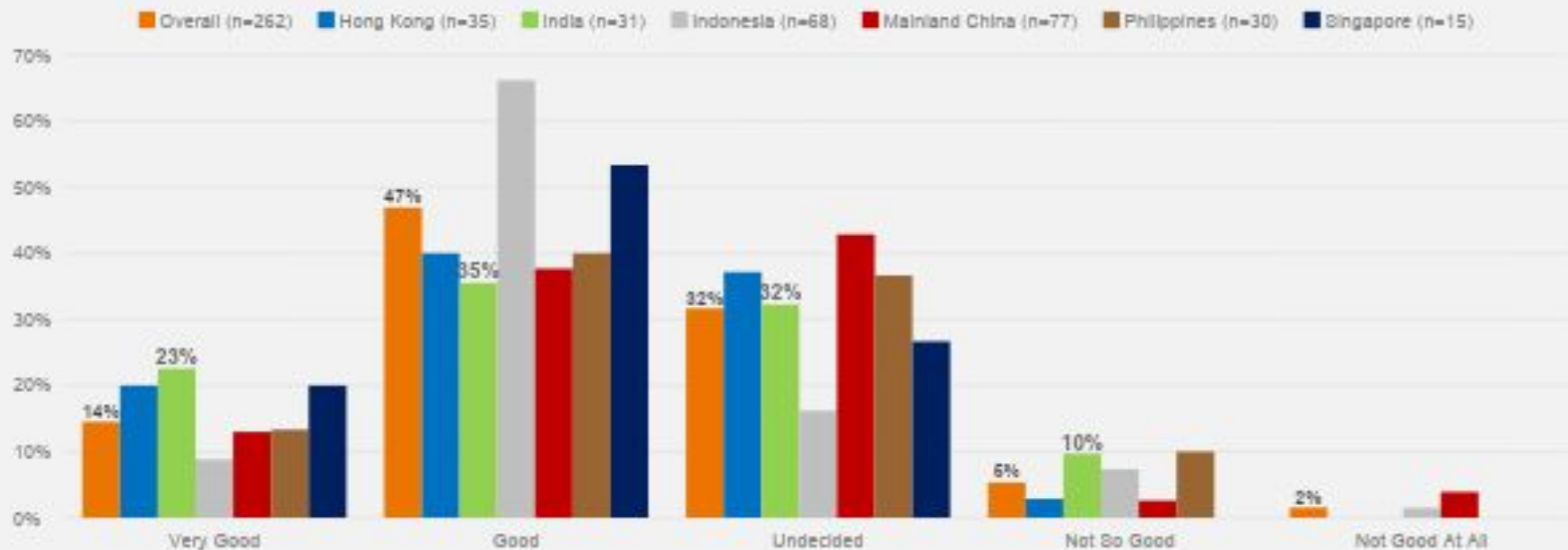
Evaluation of Coaching Quality contd...

- CRs opined that overall perceived quality of coaching services is rated 'Very good' and 'Good' is 58%, 'Undecided' is 32% while 'Not so good' and 'Not good at all' is 10%
- The top 5 areas of development identified are:
 - Clarity of coaching objectives
 - Coachee's understanding of what coaching is
 - Coach-Coachee matching process
 - Review/feedback of coaching assignment at the end of the process
 - Alignment with business strategy

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'.

Evaluation of Coaching Quality contd...

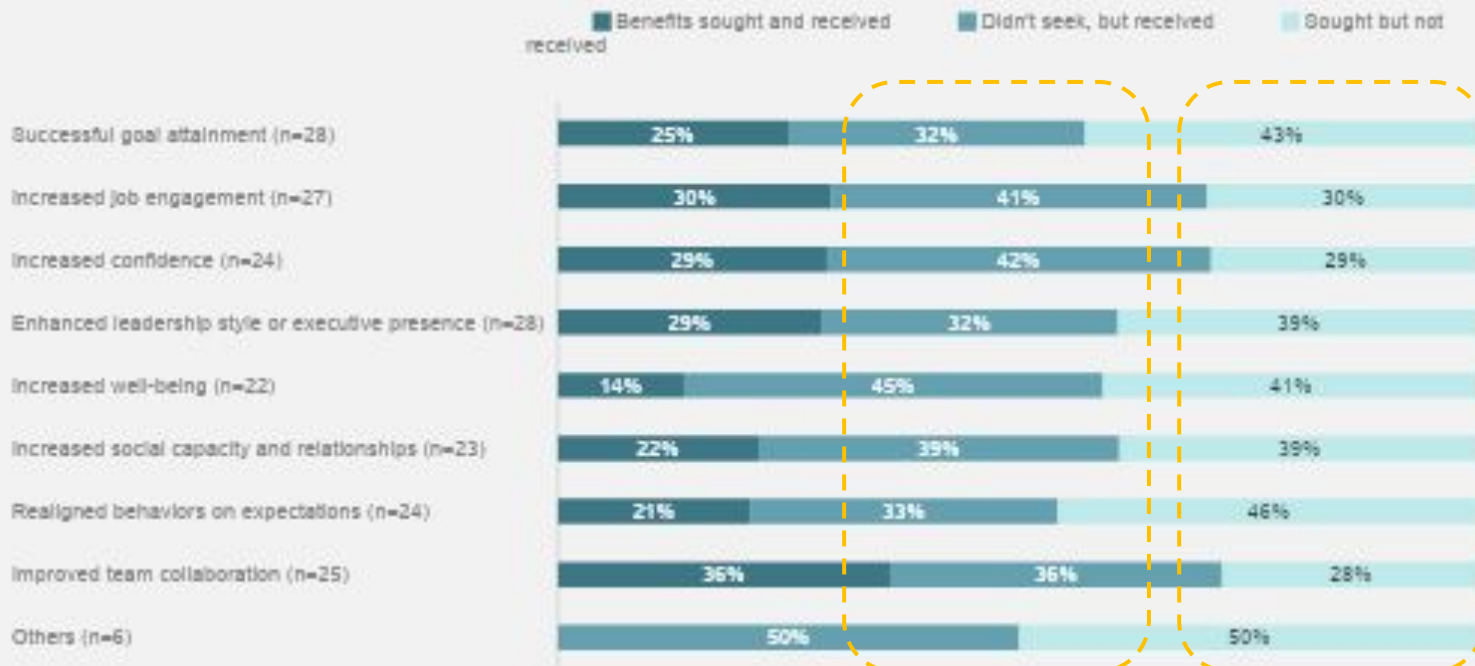
- When we look at the market data, Indonesia and Singapore have over 70% rated 'Very Good' and 'Good' services while the rest of the markets range between 50-60%
- In the 2017 Survey, 83% in India, 66% in China and 54% in HK rated services 'good' and 'very good'. In this survey, India has experienced a drop of 20%, HK dropped slightly while China stayed consistent. More details can be found in the market report

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

Coaching Impact

~37% of organizations didn't receive benefits that they sought, while another 37% received benefits that didn't seek

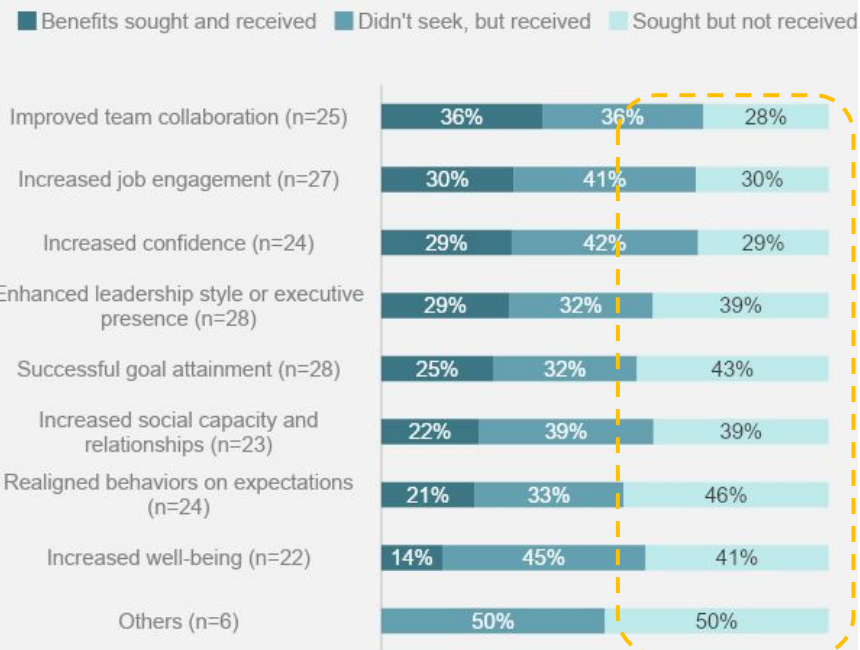
Q. What were some of the benefits your company sought and gained after providing coaching assignments for employees?



Coaching Benefits – Expectations vs Delivery

Significant divergence between understanding of Companies vs Coaches in benefits achievements from coaching services

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



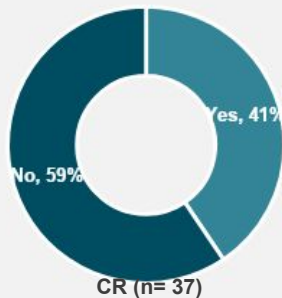
Q. What are the main benefits your clients report they experience after participating in a coaching assignment?



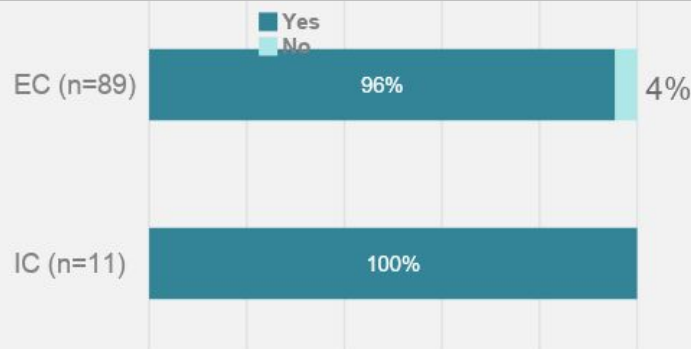
Usage of Evaluation Tools To Measure Success of Coaching

There is a marked difference in the usage of evaluation tools by Corporate 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)



- Only 41% of the Companies use evaluation tools to measure the success of coaching while 59% of the Companies do not use evaluation tools
- Measuring success of coaching is ambiguous as there are many variables involved; including multiple stakeholders, complex business context, environment and so on
- Coaches are usually accountable for sharing feedback about the coaching process with companies which could explain why companies may see a lesser need to conduct evaluation directly

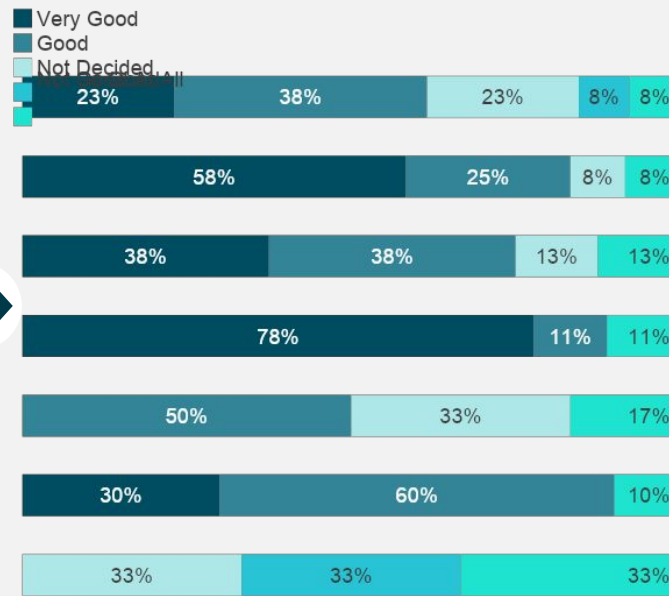
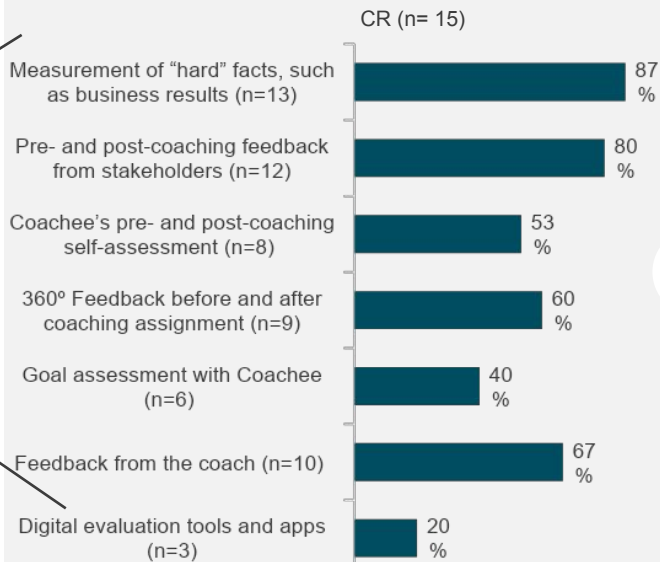
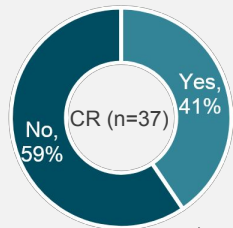
Measurement of Coaching Success

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

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? (multi choice)

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



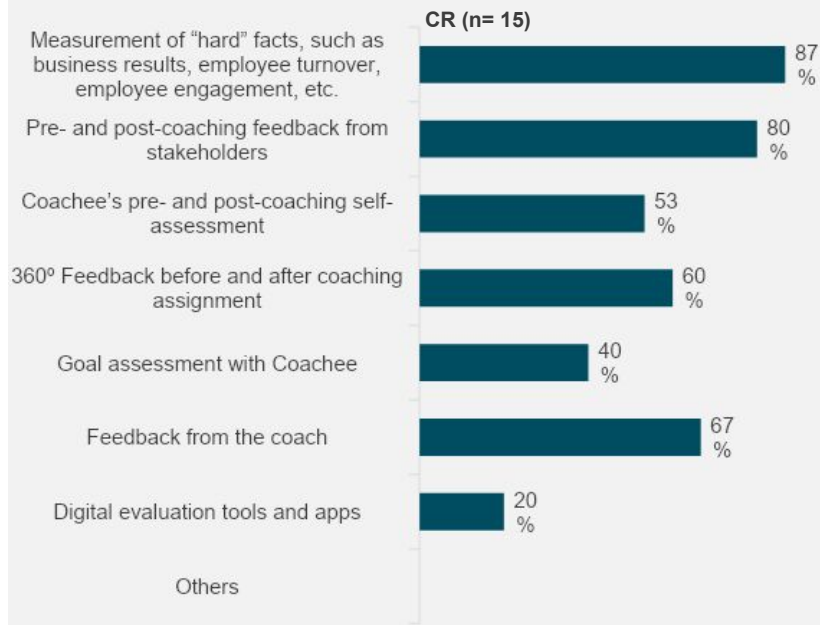
Measurement of Coaching Success contd...

- Of the 41% companies that use evaluation tools, the top three evaluation criteria are 'hard' facts such as business results, pre and post coaching feedback from stakeholders and coach followed by 360 feedback pre and post assignment, self assessment pre and post assignment
- Of all the evaluation tools used, the most appropriate tool was reported to be 360 feedback pre and post assignment followed by feedback from coach and pre and post coaching feedback from stakeholders
- Only 20% indicated that they use digital evaluation tool and Apps

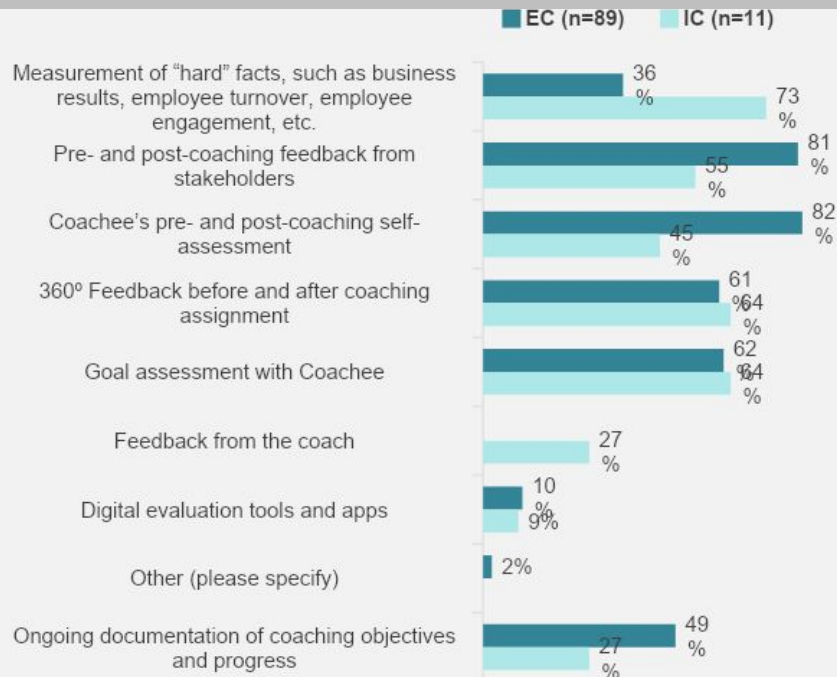
Measurement of Coaching Success contd...

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

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?



Measurement of Coaching Success contd...

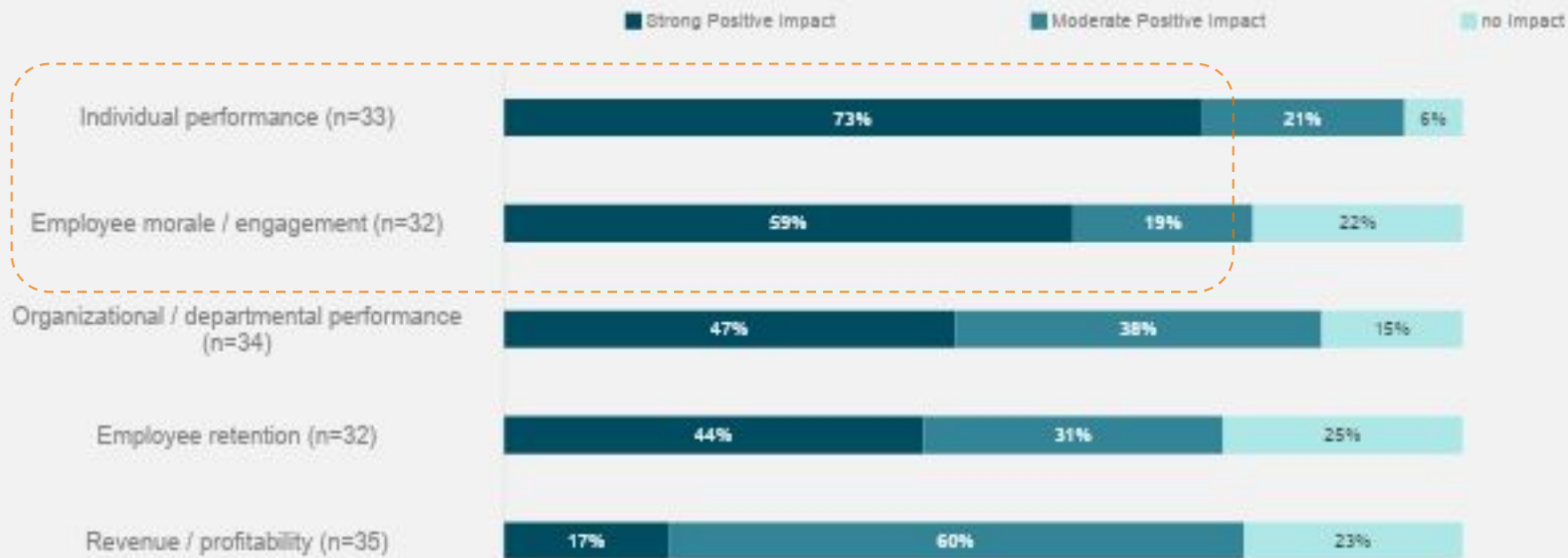
- In the case of Coaches, interestingly, the results differ from companies. 36% ECs and 73% ICs indicated that they measure 'hard' facts while more than 80% ECs and around 50% ICs indicated that they measure 'soft' facts like pre and post coaching feedback and goal assessment with coaches and stakeholders.
- About 49% ECs and 27% ICs indicated that they document coaching objectives and progress on an on-going basis
- Only 2% coaches use digital evaluation tools and Apps.

Something to Ponder: What do coaches need to focus on measuring to make coaching benefits more known to companies? How do we link what we measure to business results or 'hard' facts, to make it meaningful and relevant to Companies?

Coaching Impact

Coaching impact has been observed across all parameters, top two being individual performance and employee morale/engagement

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



8. Coaches Professional Development

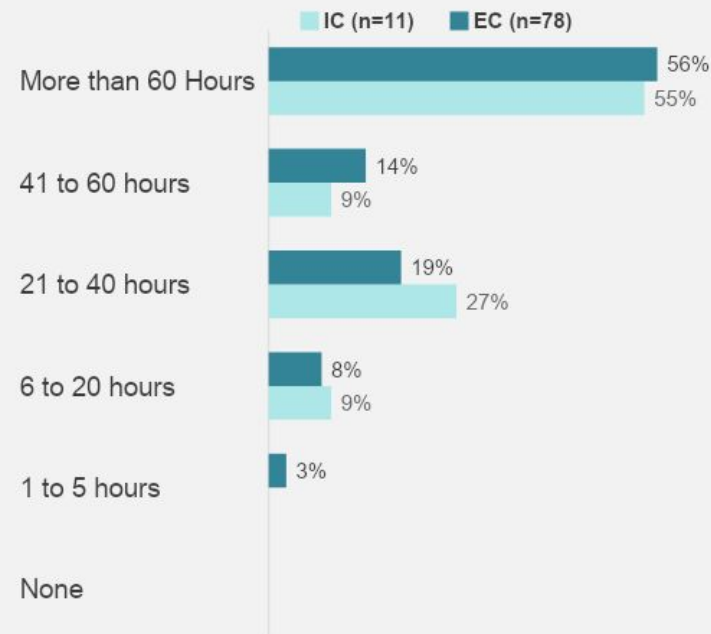
Professional Development of coaches - Practices and Time spent

Around similar number of ECs (56%) and ICs (55%) spend 60 hours or more per annum on continuous professional development and the top four engagements being going for professional development events, reading books/magazines, coaching research and attending coaching conferences

Q. What forms of continuous professional development do you engage in? (multiple choices)



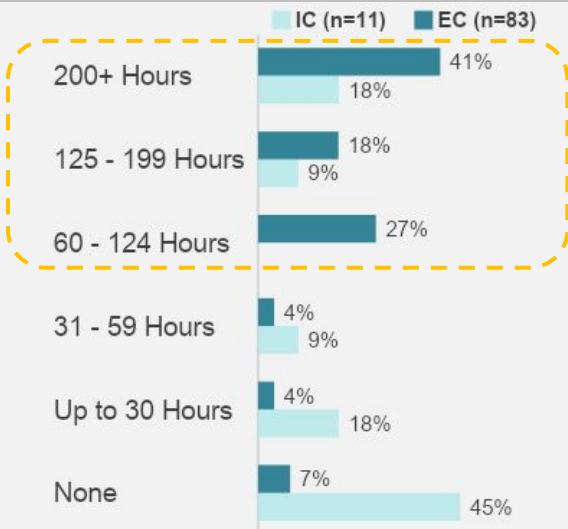
Q. How much time do you spend on continuous professional development (per annum)?



Coaches' Training and Education

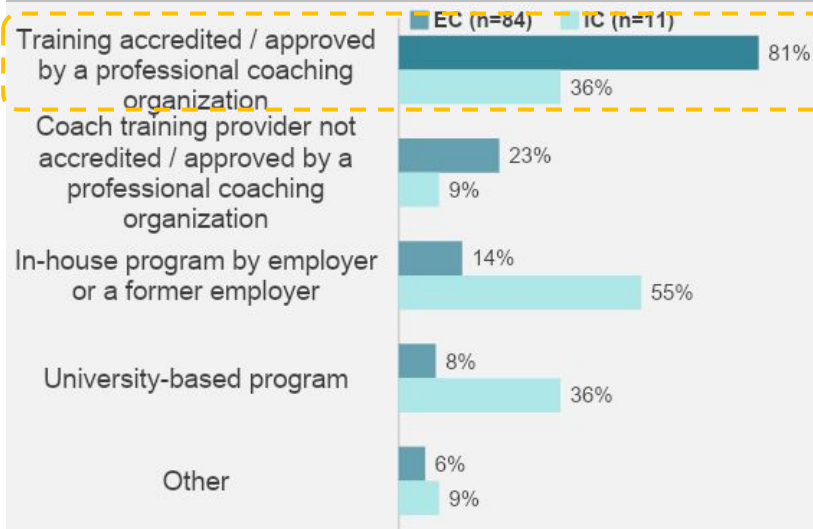
41% of ECs have received more than 200 hours of training vs 45% of ICs have not received any training

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



While 81% of ECs reported “Training accredited / approved by a professional coaching organization” best described the coaching education and trg., 55% of ICs described in-house programs by present/past employer to be theirs

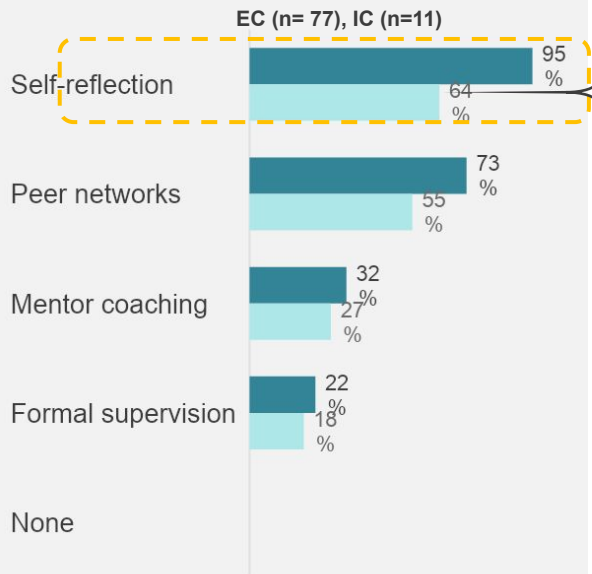
Q. Which of the following best describe the coaching education and training you have received?



Reflective Practices/Coaching Supervision

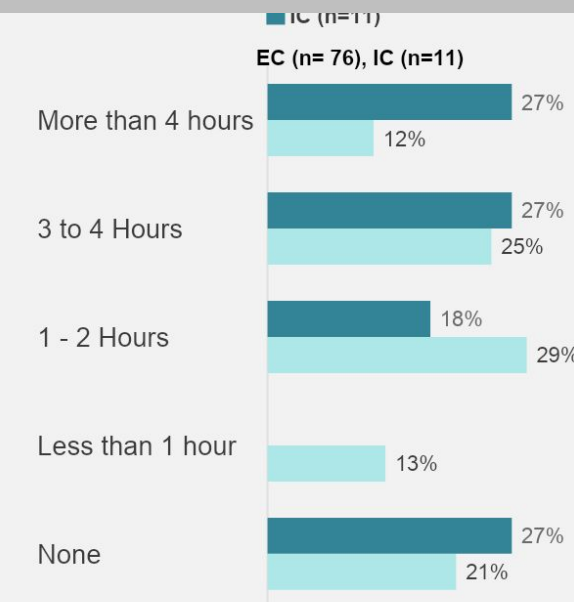
Self-reflection is the most followed reflective practice

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



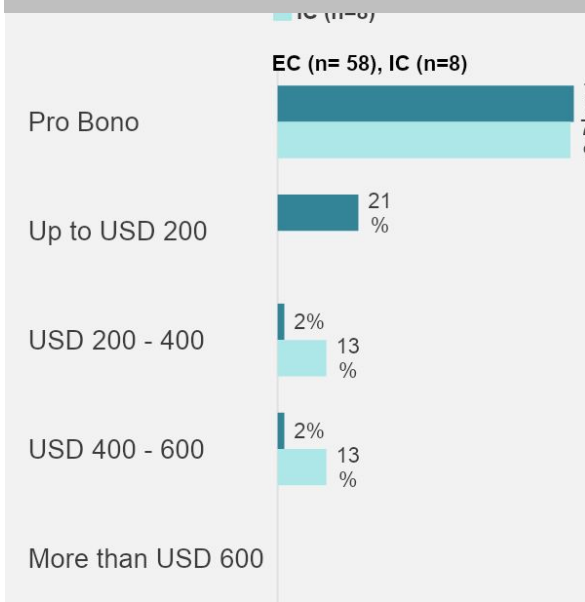
Between 1 to 4 hrs was the most reported time spent on coaching supervision

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



While most Coaches get supervision pro bono, one fifth pay up to USD 200 / hour

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



Reflective Practices/Coaching Supervision

- 95% ECs and 64% ICs say they use self-reflection, peer networks (73% and 55%) and mentor coaching (32% and 27%) are also used
- **Formal coaching supervision** although very new, is also being used by coaches (22% ECs and 18% ICs)
- Highest number of ICs (29%) say they spend 1-2 hours/month on coaching supervision, while ECs reported highest numbers (27%) are 3 hours and more per month. While most Coaches (76% ECs and 75% ICs) say they get supervision pro-bono, 21% of ECs reported to be paying up to USD 200/hour and 13% of ICs reported to be paying more than USD 200 and up to 600.

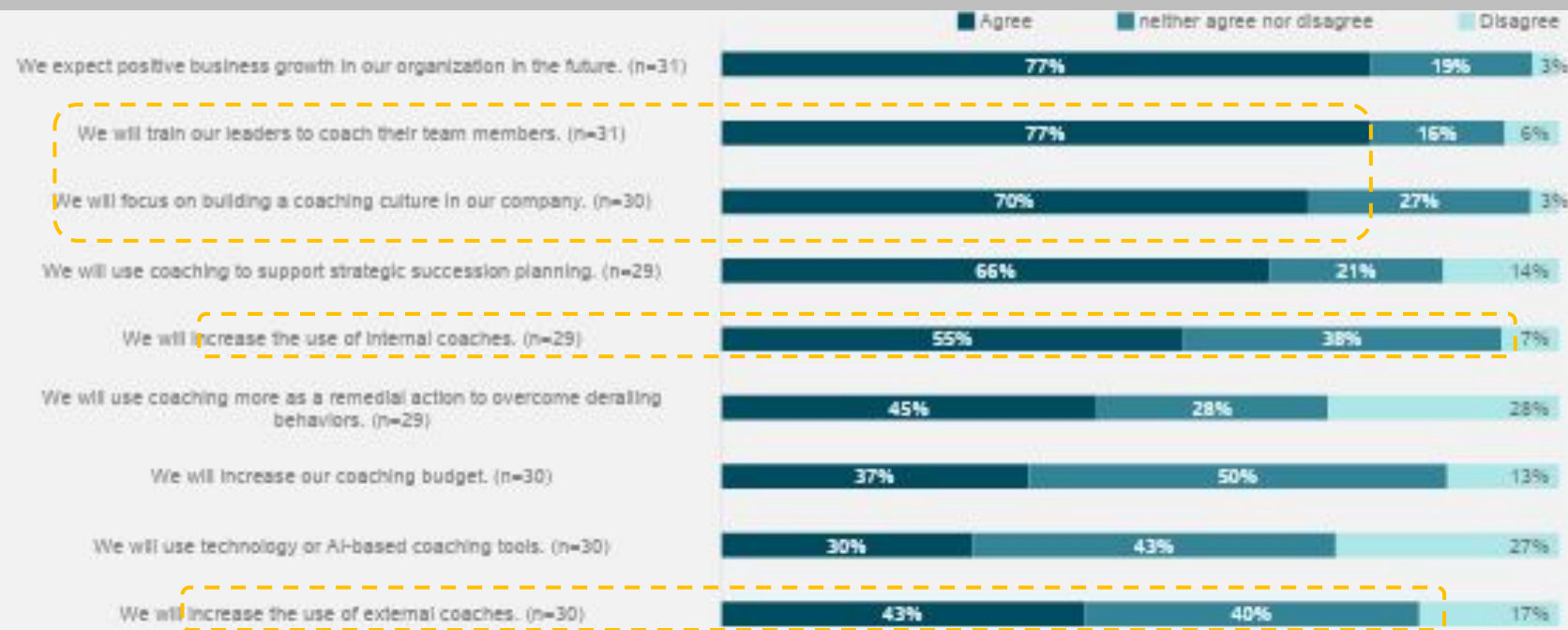
Something to ponder: How is the value of formal Supervision distinct from Mentor Coaching and Peer Network learning and how does it enhance the quality of coaching? How do we ensure the quality of supervision?

9. Outlook

Organisations Perspective on Future Outlook

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

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



Organisations Perspective on Future Outlook contd...

- Companies plan to increase overall focus on coaching; their top three priorities lies in building inhouse capability followed by use coaching to support succession planning and using coaching more as a remedial action to overcome derailing behaviour
- While 43% companies say they want to increase using external coaches, 77% say that they also want to train their leaders to coach team members and 70% to build a coaching culture in the company.

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

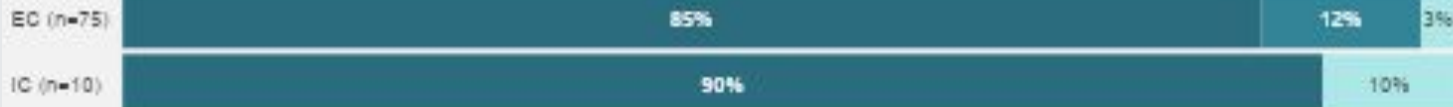
Coaches Perspective on Future Outlook

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

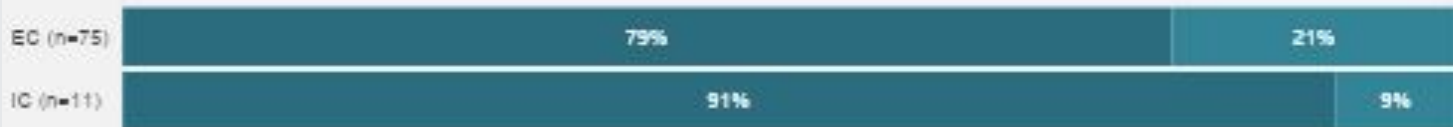
Q. Please give us your outlook about future developments in coaching within the next two years

■ Agree ■ Neither Agree or Disagree ■ Disagree

Coaching demand in the local market will increase.



The extent of my own coaching activities will increase.



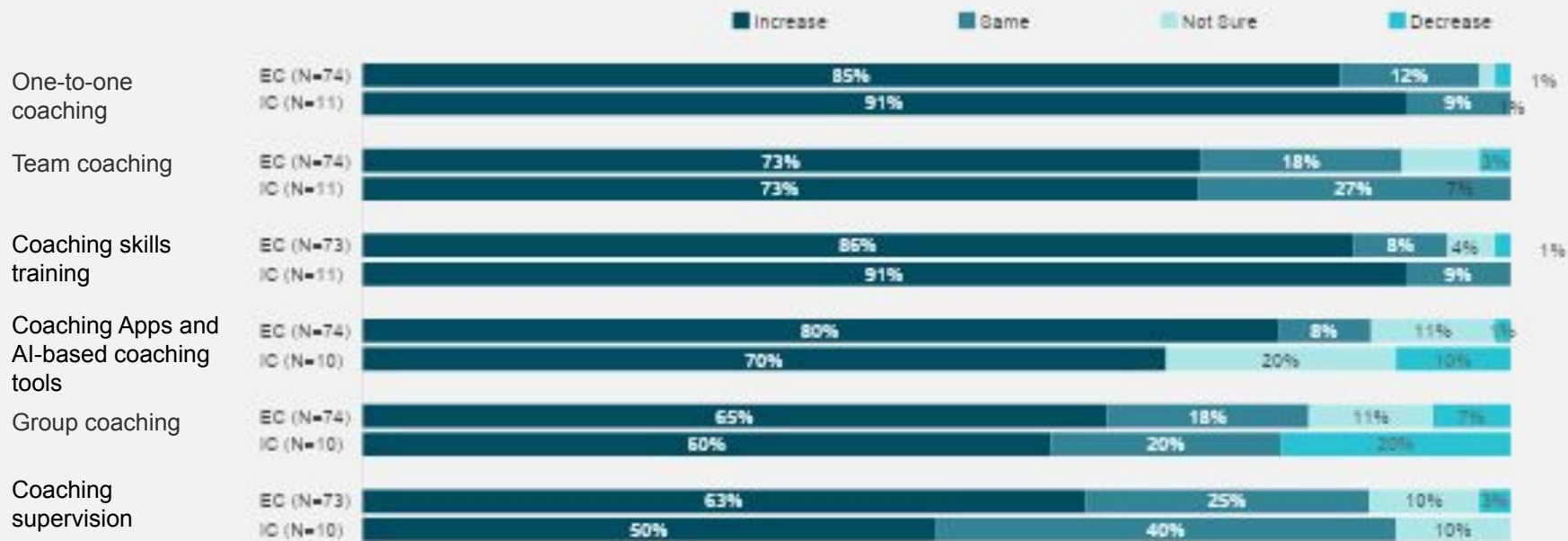
The competition among coaches will increase.



Coaches Perspective on Future Outlook

ECs 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



Coaches Perspective on Future Outlook

- One-to-one (EC 85%, IC 91%) and team coaching is (EC 73%, IC 73%) indicated to increase, Coaching Apps and AI based tools are also predicted to rise (EC 80%, IC 70%).
- Coaching supervision, a relatively new area, is also predicted to increase by coaches

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

Opportunities emerging from the survey

For Companies

- How can Companies contribute to increasing the concept of coaching?
- How can Companies link their ROI of coaching in linking their bottom-line assessment of coaching?
- 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?
- How can Companies use technology to have a wider audience of coaching in their organisations?

For Coaches

- 30% of India companies reached have not used coaching. How can coaches reach out to this untapped market? Coaching concept not being well known and cost are seen as the biggest barriers. 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 common understanding between internal and external coaches?
- How can coaches facilitate effective tripartite conversations on coaching outcomes?
- How can coaches leverage technology in creating more value in coaching for Companies?

10. Closing Thoughts

Closing thoughts

- We are happy to present to you the **Geography Report for India**, 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, India, Indonesia, Singapore, 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:*

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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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