The Coaching Voice of Asia Pacific

5th Coaching Survey an Asia Coaching Benchmark, 2019

The Integrated Report

Participating Markets:

Hong Kong, India, Indonesia, Mainland China, Philippines, Singapore

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Acknowledgement of Sponsors, Partners and Research team

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(Refer to sponsor section)

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

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

Table of Contents

1. Introduction, Methodology and Purpose

1.1 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 fouth 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 Bienniel Coaching Conference in Mumbai, India, in August 2019
- The aim is to include other Asia Pacific markets in future studies.

1.2 Methodology

- **Medium:** Online Questionnaire (143 questions)
- **Distribution channels:** Sponsors, Networks, & Social media
- **Time Frame:** Feb 2019 to April 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
- **Participants:** CR, EC and IC

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

1.3 Survey Progress

	2010	2012	2014	2017	2019
Countries	1	1	1	3	6
Languages	1	1	1	1	3
Total Participants	81	146	369	554	1,289
Companies	43	55	71	168	428
External Coaches	38	68	113	321	703
Internal Coaches	NA	23	35	65	156

1.4 Top Eight Insights and Trends

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

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

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

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

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

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

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

2. **External or Internal Coaching – Majority of companies are using a combination of ECs and ICs**

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

- **More companies are using a combination of ECs and ICs:** 69% companies use ECs and ICs to a varying range, 23% of companies engage only ECs to meet their coaching needs, while 8% of the companies are almost fully dependent on ICs.

- **Confidentiality and neutrality concerns with ICs:** While Companies find ICs more cost effective (82%) and providing better ROI (64%) than ECs, they point to confidentiality & neutrality (65%) and the level of trust (57%) issues with ICs.

- **Profile of EC and IC**

  Survey indicated that on an average, ECs are older in age, they have more overall work experience as well as coaching experience. ECs are spending more time in the professional skill development (138 hours) as compared to IC (85 hours). Larger number of ECs than ICs are members of professional bodies and are credentialed.

  However, 37% ICs and 16% ECs do not have formal credentials from any professional body.

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

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

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

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

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

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

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

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

   - **Coaching benefits:** 84% of respondent companies see some impact of coaching on their business bottom line. Coaching seems to have a strong positive impact on individual performance and employee morale/engagement while organization performance, employee retention, revenue and profitability received a moderate positive impact. Only 16% reported no impact on the bottom line.
     Another interesting fact emerging from the survey is that while 40% of the companies have not received the specific benefits they sought from coaching; 40% received the benefits they did not seek. 20% companies received the coaching benefits they sought from coaching

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

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

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

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

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

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

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

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

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.

With the increase in demand and supply, how will the future coaching market evolve? How do coaches deepen and broaden their skills and stay ahead of the competition? How can companies capitalize on available external expertise to build on the internal resources? How can coaches play a role in creating future readiness for themselves and the clients?

The first version of the report was generated in December 2019. In view of the Covid-19 pandemic, the use of technology and AI tools is likely to increase manifold and perhaps rapidly.

2. Demographics

2.1 Overall Study: Participants Overview & Distribution

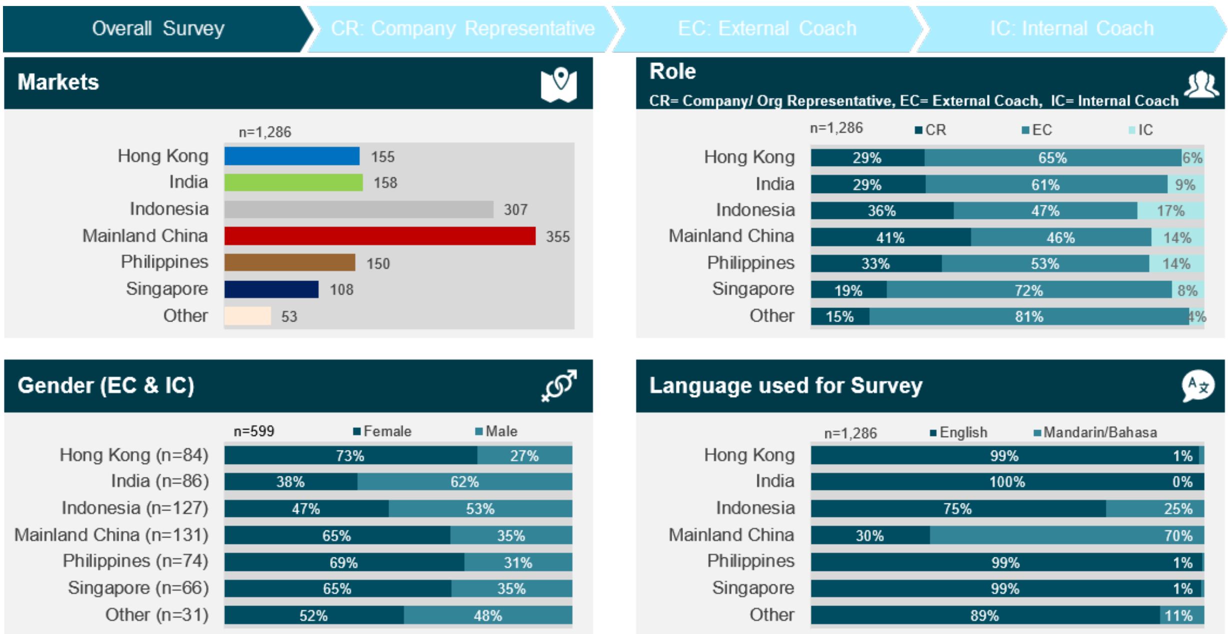
A total of 1286 valid responses were received in this survey. The highest number of respondents came from Mainland China (355) followed by Indonesia (307). Out of the total number of respondents, ECs attributed half the total respondents, CRs one third and ICs about 10%. Overall, there are more female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

Overall Survey	CR: Company Representative	EC: External Coach	IC: Internal Coach
Market	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%**
Stakeholders	External Coach	703	55%
	Organization Representative	427	33%
	Internal Coach	156	12%
	Total	**1,286**	**100%**
Gender Only (EC+IC)	Male	250	42%
	Female	349	58%
	Total	**599**	**100%**
Language used for survey	English	951	74%
	Mandarin	258	20%
	Bahasa Indonesia	77	6%
	Total	**1,286**	**100%**

2.2 Overall Study: Participants Overview & Distribution by Market

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 EC and CR categories, while for Hong Kong, India and Singapore, the majority of respondents were from EC category.

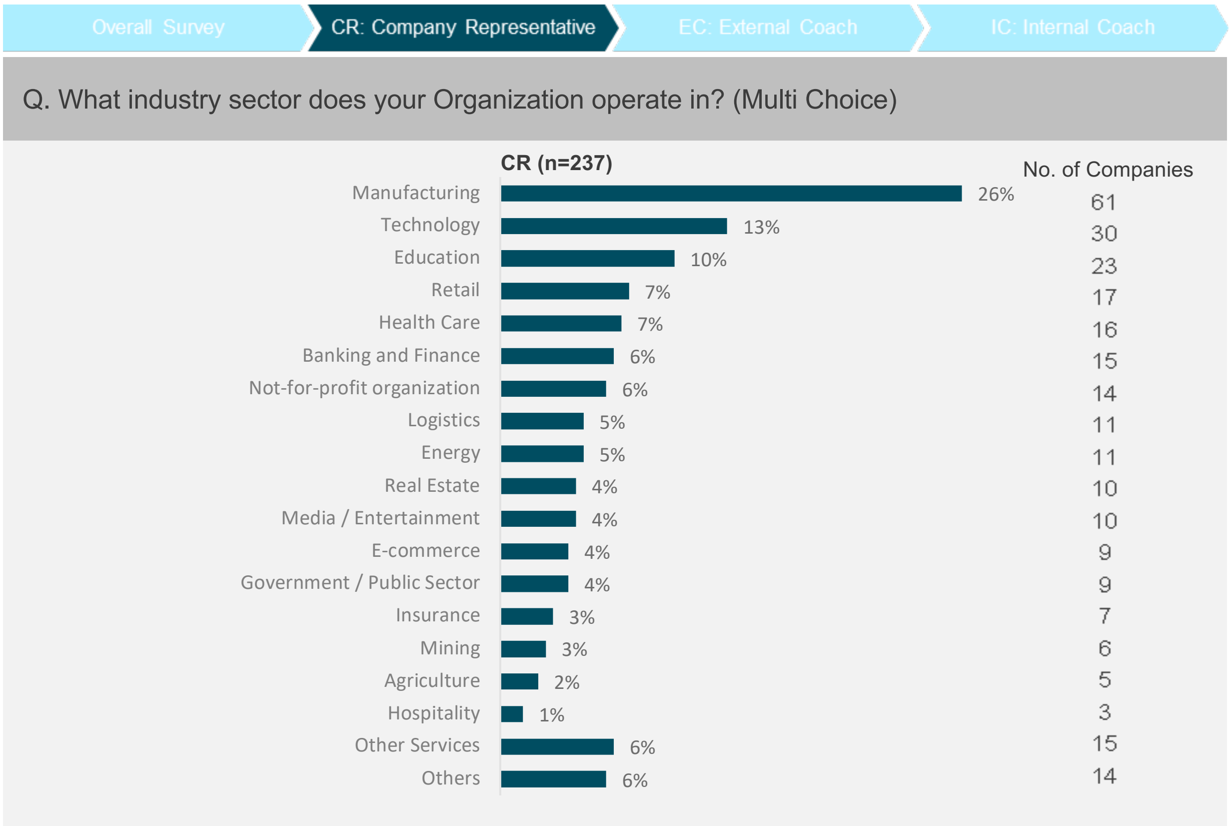
Majority of participants responded to the survey in English. 70% respondents in Mainland China used Mandarin and 25% in Indonesia used Bahasa Indonesia.



2.3 Participating Organizations - by industry sector and type

The survey reached a well diversified sample from a large number of industry sectors. The highest number of CR respondents were from Manufacturing (26%), Technology (13%) and Education (10%) sectors.

In 2017 Survey, the highest number of CR respondents were from Technology (13%), Retail (9%), and Banking & Finance (7%) sectors.



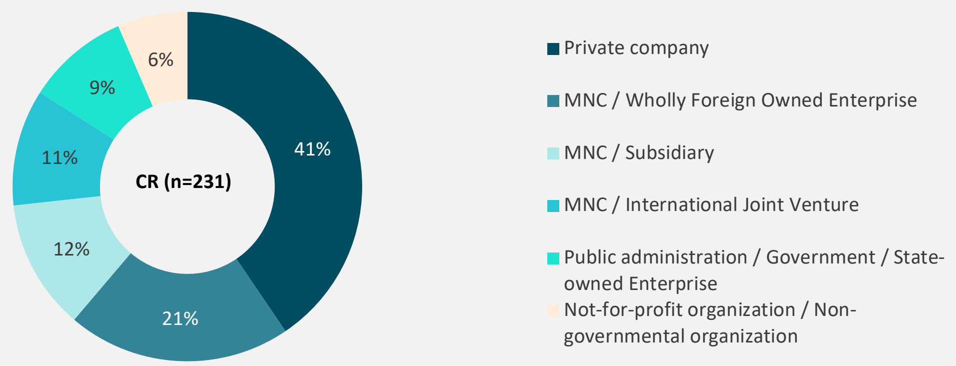
MNC and Private companies constituted the largest proportion of respondents.

MNC’s constituted 44% of the sample followed by private companies 41%; Public and Government sector 9% and NGO 6%

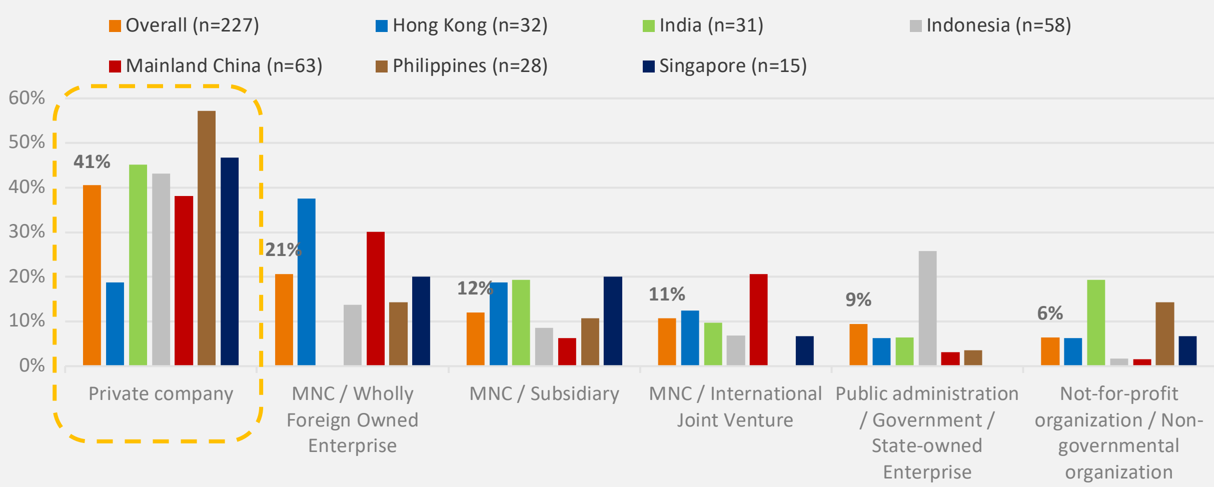
The CR base has become more diversified in this survey; MNC respondents have changed from 73% in 2017 survey to 44% in this survey. This may be due to the inclusion of three new markets in the survey, as well as extended reach of the coaching community in local private companies.

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

Q. What is your company status?

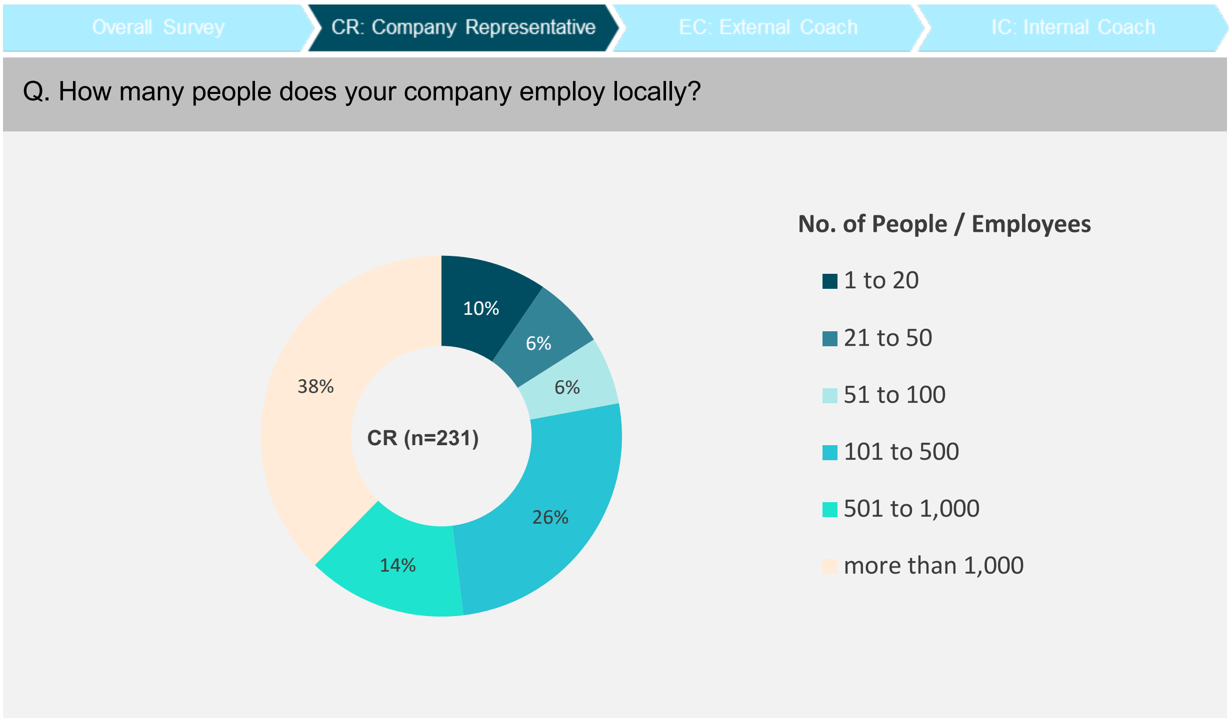


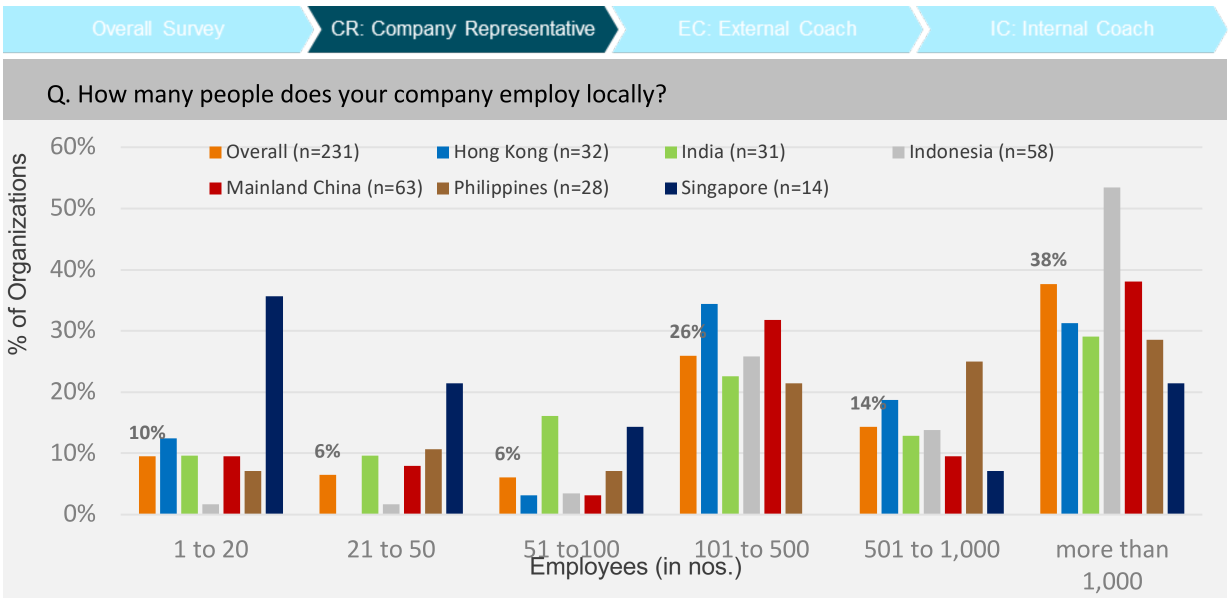
In the 2017 Survey, 73% were MNC companies compared to 44% in this sample



2.4 Participating Organizations - Distribution by Employees

The survey reached companies of varying employee size ranging from upto 100 employees (22%), 101-1000 (40%) to more than 1000 employees (38%).



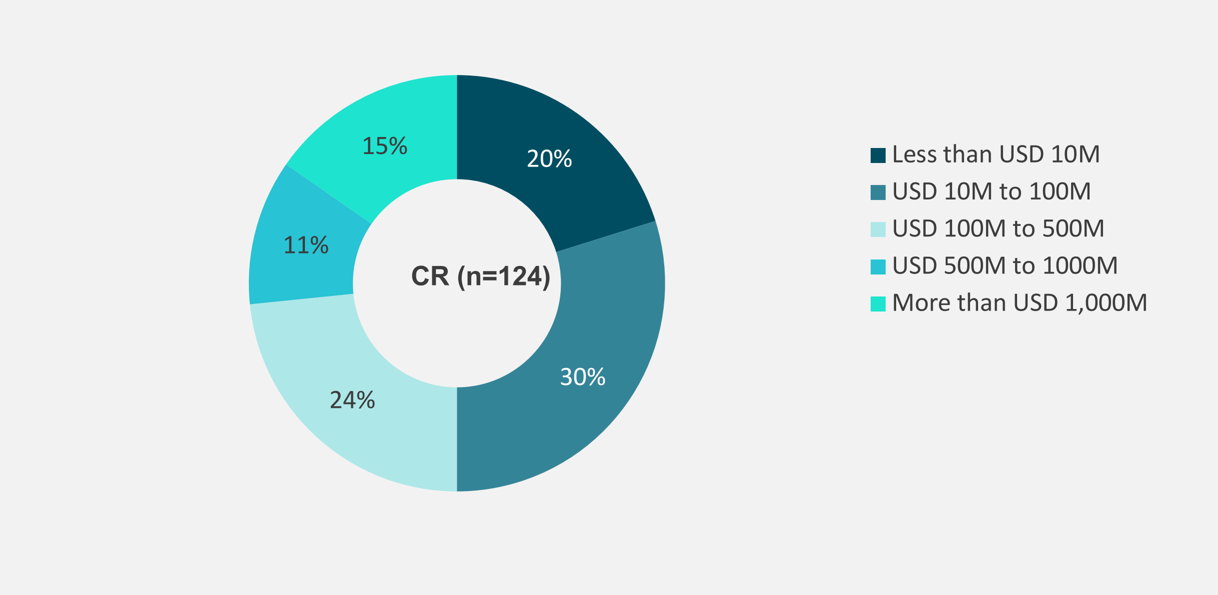


2.5 Participating Organizations - Distribution by Revenues

Well diversified sample from varying revenue brackets ranging from less than USD10M (20%), USD 10M - 1000M (65%), and more than USD 1,000M (15%).

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

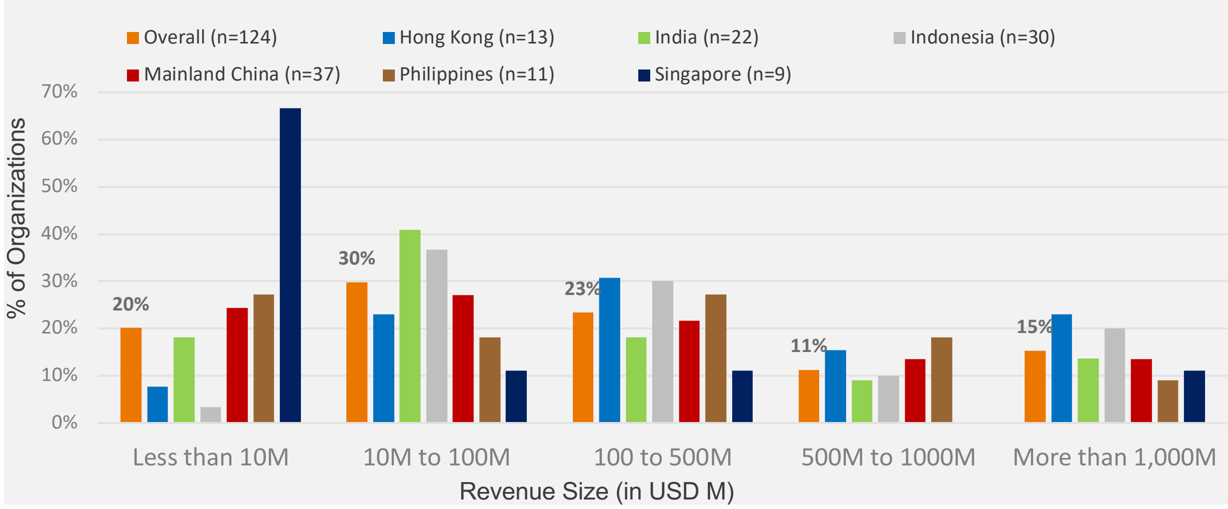
Q. What is the company size in terms of revenue in USD million per year (local market only)?



In the 2017 Survey, 66% of the companies were below USD 50M

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

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

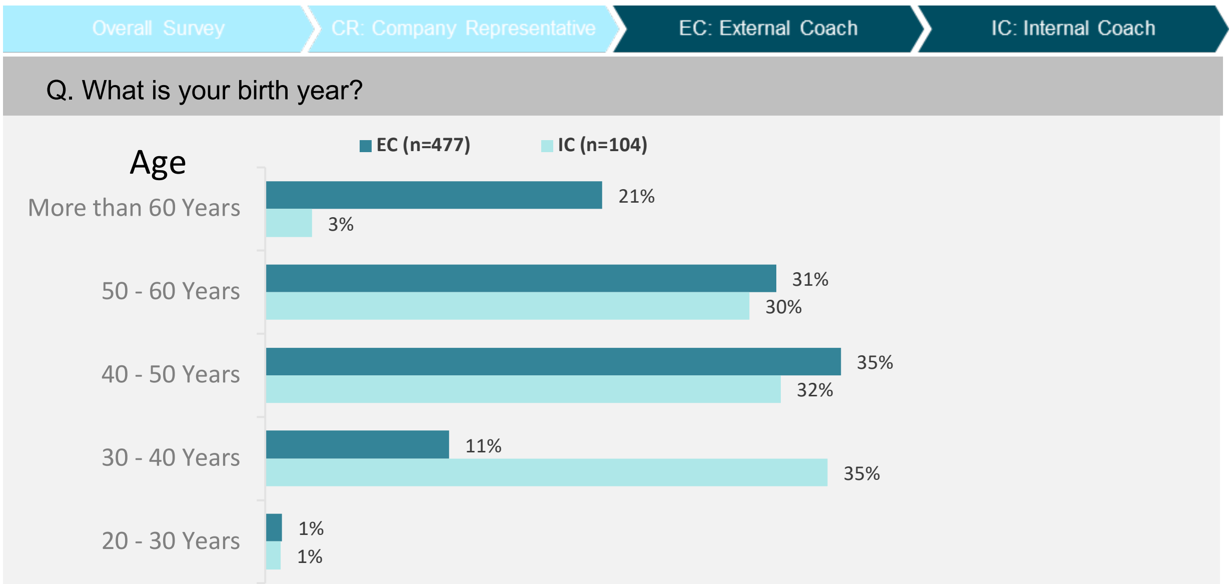


2.6 Distribution of Coaches by Age

Average age of EC respondents is 49 years and average age of IC respondents is 42 years

35% of the ECs are in the age range of 40-50 years, 31% are 50-60 years, 21% more than 60 years and only 11% are 30-40 years

35% of the ICs are in the age range of 30-40 years, 32% 40-50 years and 30% 50 to 60 years and only 3% more than 60 years



2.7 Distribution of Coaches by Years of Experience

ECs have relatively more coaching experience than ICs

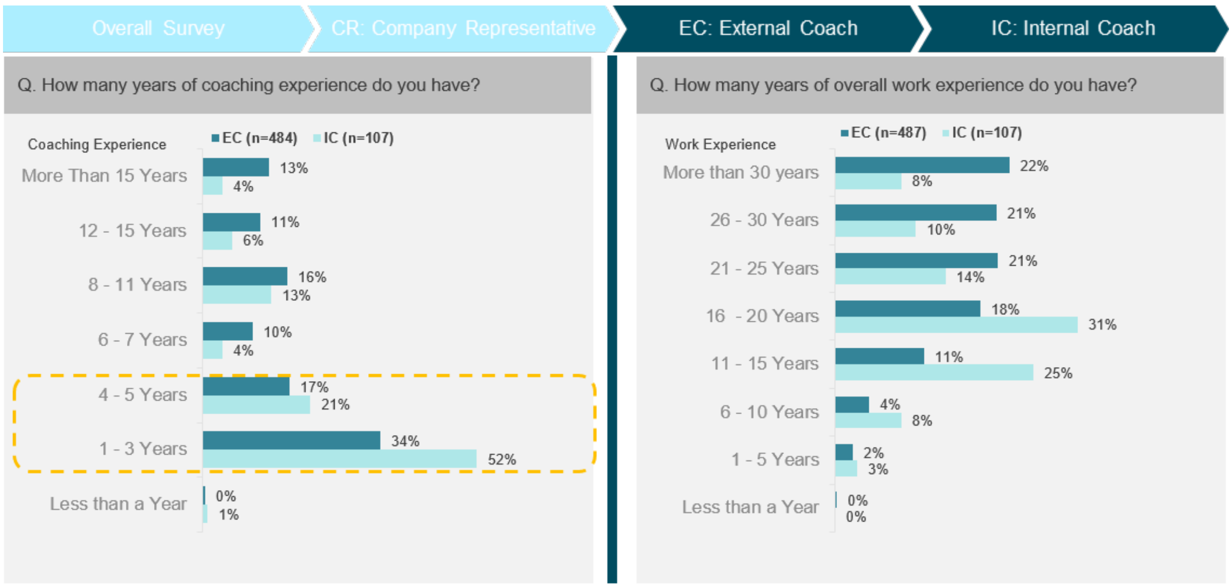
50% of ECs have coaching experience of up to 5 years, the other half has experience ranging from 6 to 15 years and above

More than 70% ICs have coaching experience of up to 5 years and only 25% have experience ranging from 6 to 15 years and above

52% of IC reported they have coaching experience of 1 to 3 years

2/3 of the ICs have overall working experience of 1 to 20 years

2/3 of the ECs have overall working experience of 21 to 30 years and above



2.8 Profile of Typical EC Participant

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

Overall Survey | CR: Company Representative | **EC: External Coach** | IC: Internal Coach

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

2.9 Profile of Typical IC Participant

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

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

	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%	42.0	43.2	3.0	5.0	50%

Something to ponder

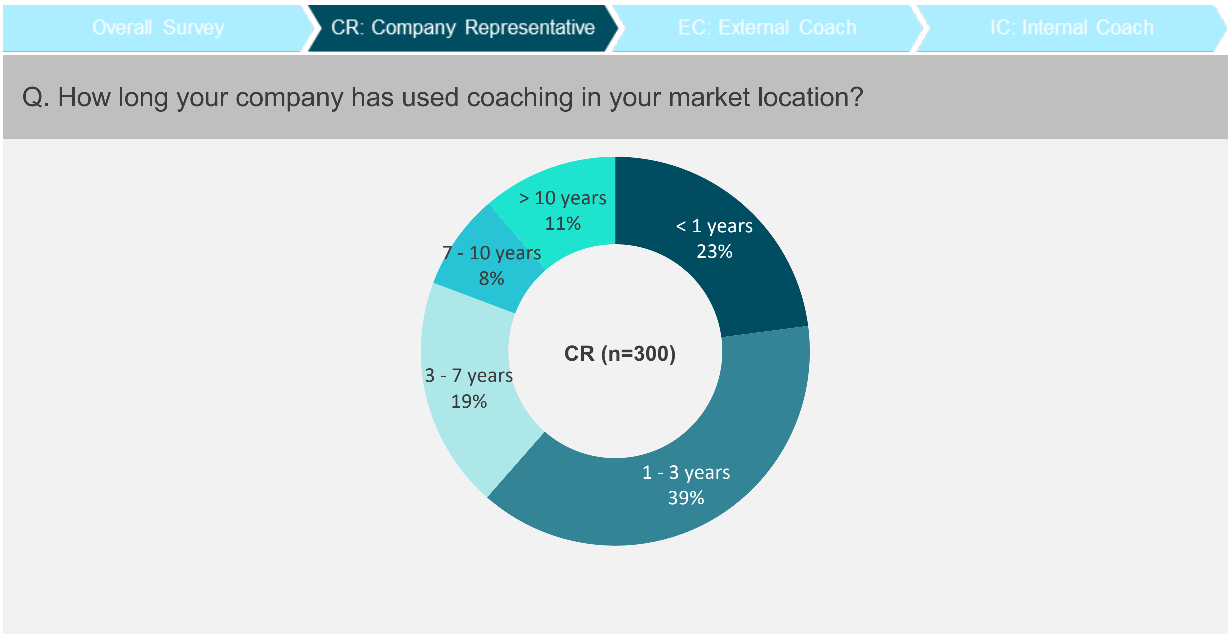
With the increasing demand of coaching for younger coachees and with companies focusing more on building internal capability for coaching, how do the more mature ECs stay relevant?

3. Landscape of Coaching Market

3.1 Growth of Coaching services

Growth of coaching services attributed to the deeper penetration in existing markets as well as expansion into new markets and industry sectors

11% companies have used coaching services for more than 10 years, 27% for 3-10 years and 62% for 3 years or less. This points to a recent growth in companies using coaching. As brought out in Section 2.3, coaching is penetrating deeper in private sector and expanding into new industry sectors like Public and Non–Government sector.



3.2 Penetration of Coaching Services – By Market

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.

3.3 Adoption of Coaching Services

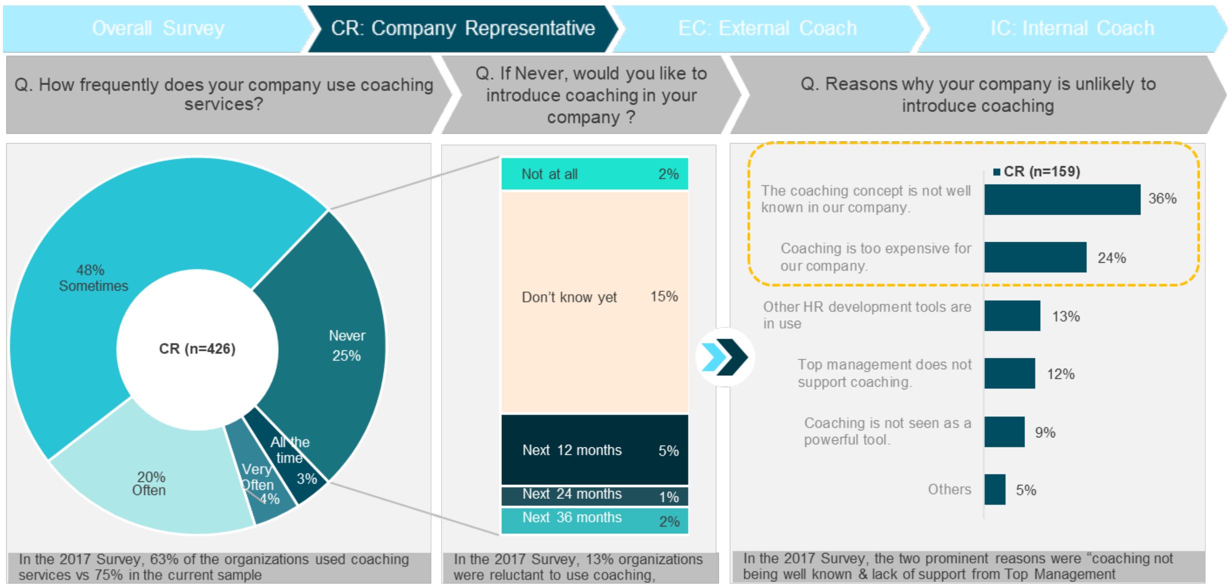
Coaching services are being more widely adopted and there is opportunity for growth

75% 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.



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.

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

Something to ponder:

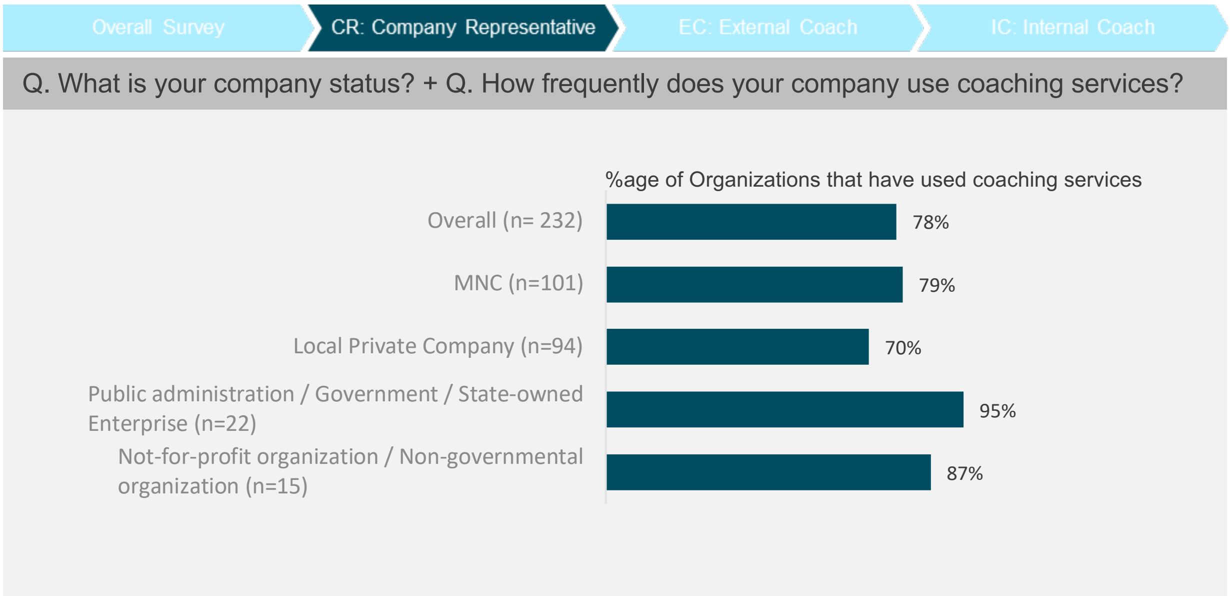
Given the barriers that maybe stopping companies from adopting coaching, what strategies can coaches use to manage the cost-benefit arbitrage as perceived by companies?

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

3.4 Coaching Services Adoption by Type of Organization

Widespread adoption across all types of participating organizations.

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.



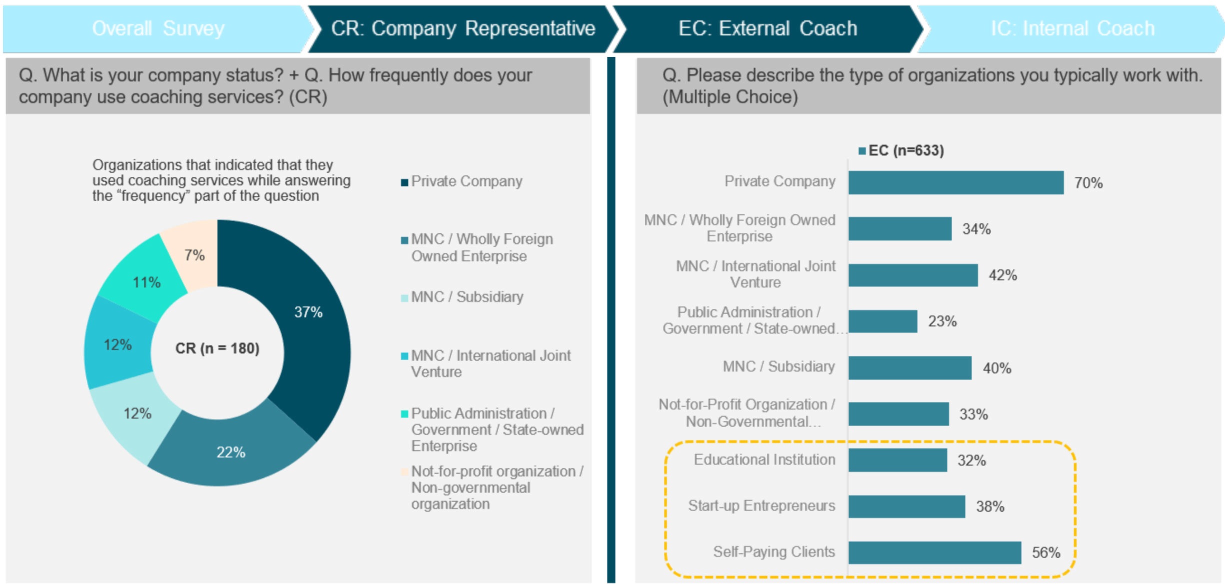
3.5 Target Clientele for ECs

Target clientele for ECs is aligned with where the demand for coaching is originating

ECs say they work with multiple sets of clients at any given time, 70% of the ECs work with Private Companies, at least 42% work with MNCs and 56% with Self-Paying Clients

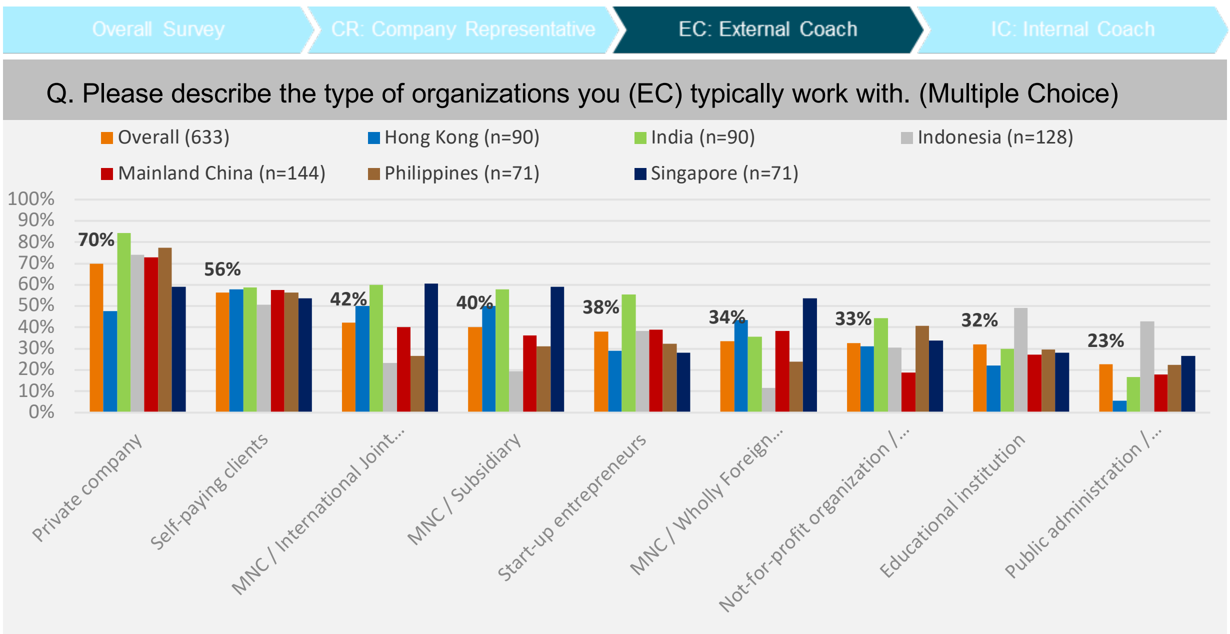
Newer target areas for coaches to focus on is also emerging from the survey - Start-ups/Entrepreneurs (38%) NGO sector (33%) and Educational Institutions (32%)

In the 2017 Survey, the top 3 areas of target clients for ECs were MNC Private Local company and Self-Paying clients.



3.6 Target Clientele for ECs – By Market

Across all markets, Private Companies and Self-paying clients top the list as the most relevant client group for ECs. While Private Companies are the largest clients with India topping the list with 70% and Hong Kong being lowest with 48%, Self Paying clients are similar across geographies, 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?

3.7 Target Groups for Coaching Services

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

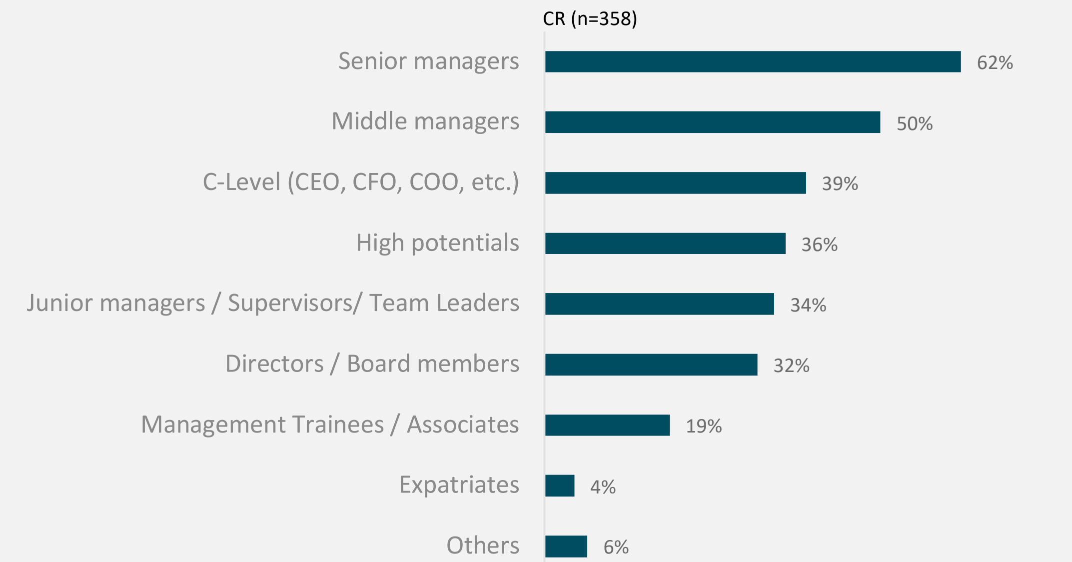
Highest target group receiving coaching services in a company is Senior Managers (62%) and   Middle Managers (50%).

39% companies say they are offering coaching at C–level and 36% to High potentials.

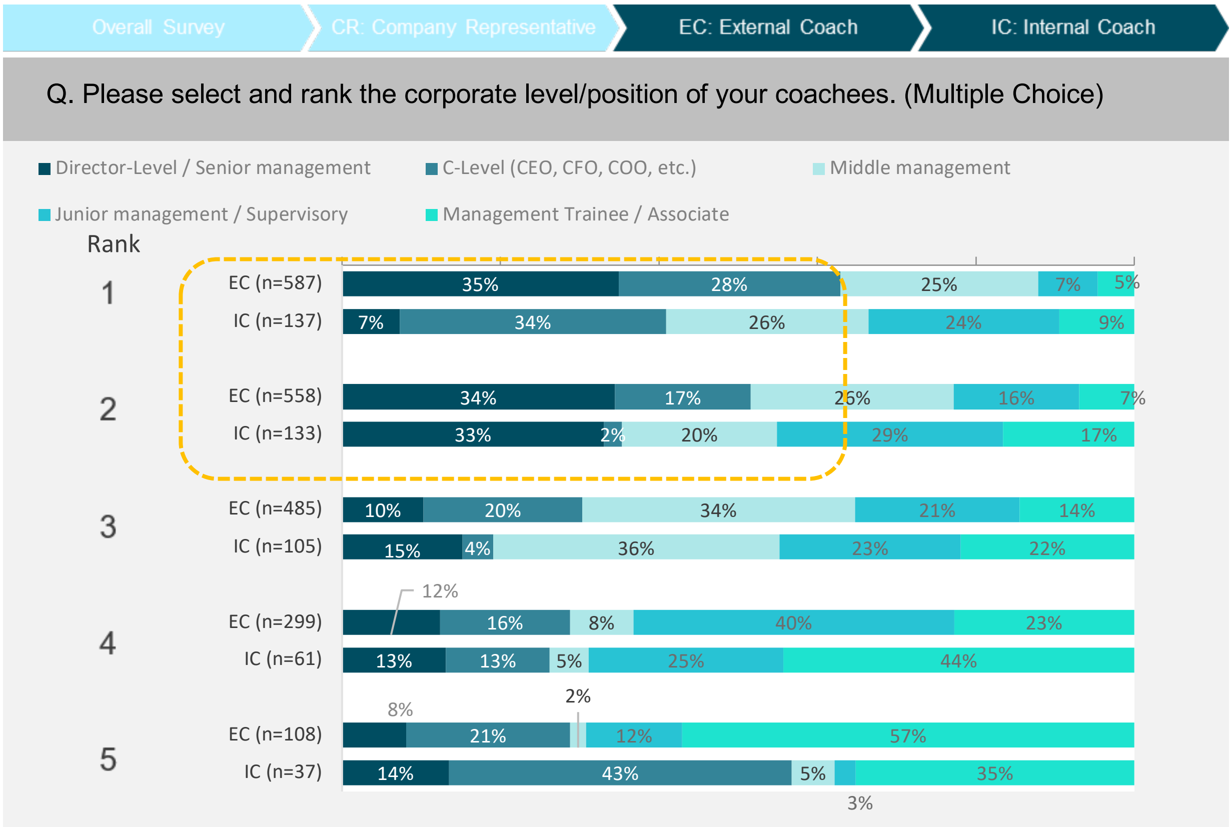
When we compare EC to IC, we find their main clients are also from Senior and Middle management.

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

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

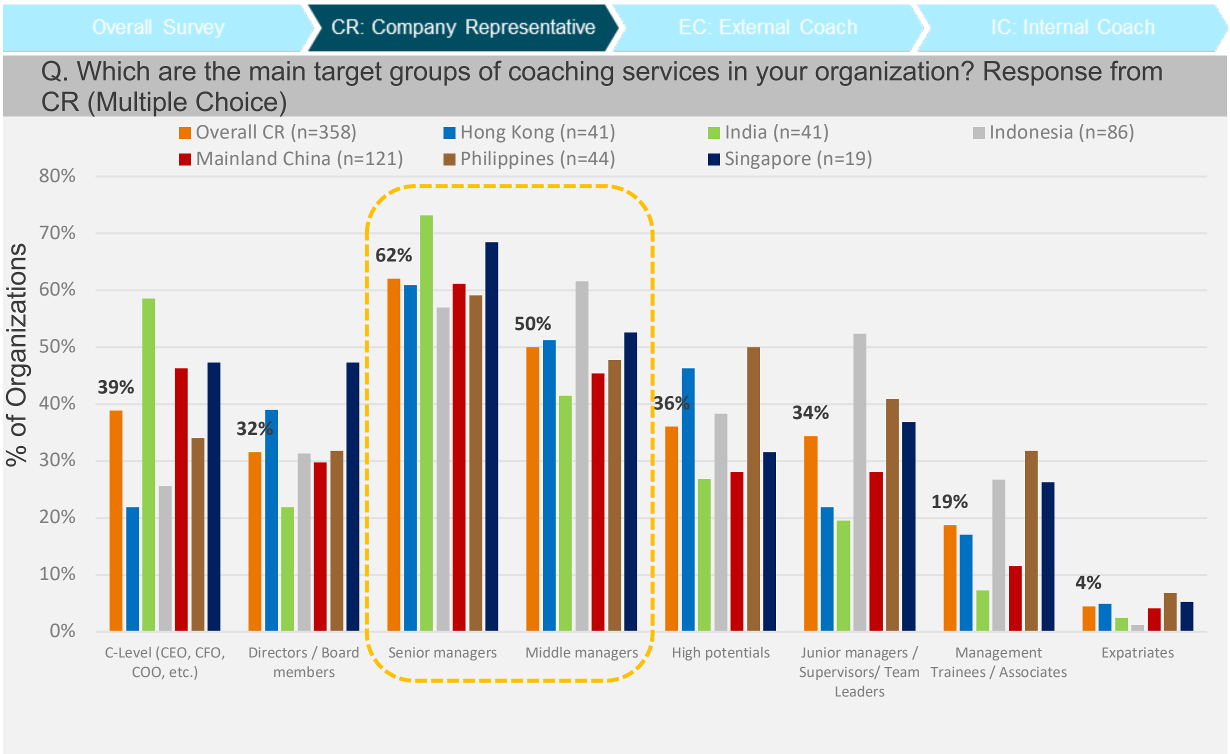


A similar finding was there in the 2017 Survey as well.


Overall Survey
CR: Company Representative
EC: External Coach
IC: Internal Coach
Q. Please select and rank the corporate level/position of your coachees. (Multiple Choice)
Director-Level / Senior management
C-Level (CEO, CFO, COO, etc.)
Middle management
Junior management / Supervisory
Management Trainee / Associate
Rank
1
EC (n=587) 35% 28% 25% 7% 5%
IC (n=137) 7% 34% 26% 24% 9%
2
EC (n=558) 34% 17% 26% 16% 7%
IC (n=133) 33% 2% 20% 29% 17%
3
EC (n=485) 10% 20% 34% 21% 14%
IC (n=105) 15% 4% 36% 23% 22%
4
EC (n=299) 12% 16% 8% 40% 23%
IC (n=61) 13% 13% 5% 25% 44%
5
EC (n=108) 8% 21% 2% 12% 57%
IC (n=37) 14% 43% 5% 3% 35%

3.8 Target Groups for Coaching Services – By Market

The main target groups for coaching services is senior and middle manager level across all markets.

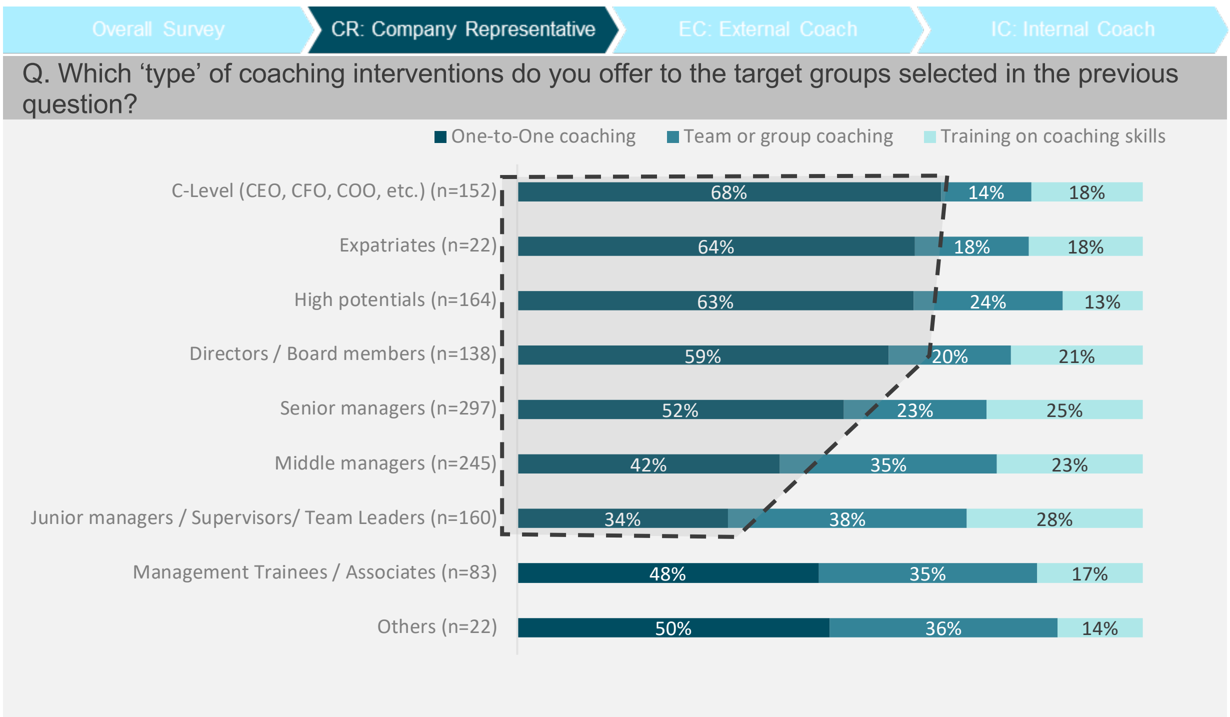


3.9 Type of Coaching Intervention – By Target Groups

Companies offer all types of coaching interventions across all levels of management from senior management to management trainees

As the seniority level of the coachee increases, "One-to-One Coaching" intervention is the most widely offered (≈61%). For middle and junior management, there is more focus on group/team coaching (42% and 34%) Almost half of the companies say they offer one-to-one coaching to management trainees (48%)

On an average 1 in 5 companies reported that they offer 'Training on Coaching Skills' intervention across all management levels. The 2017 survey however 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.

3.10 Language used to deliver Coaching

Local language is the most used language for coaching

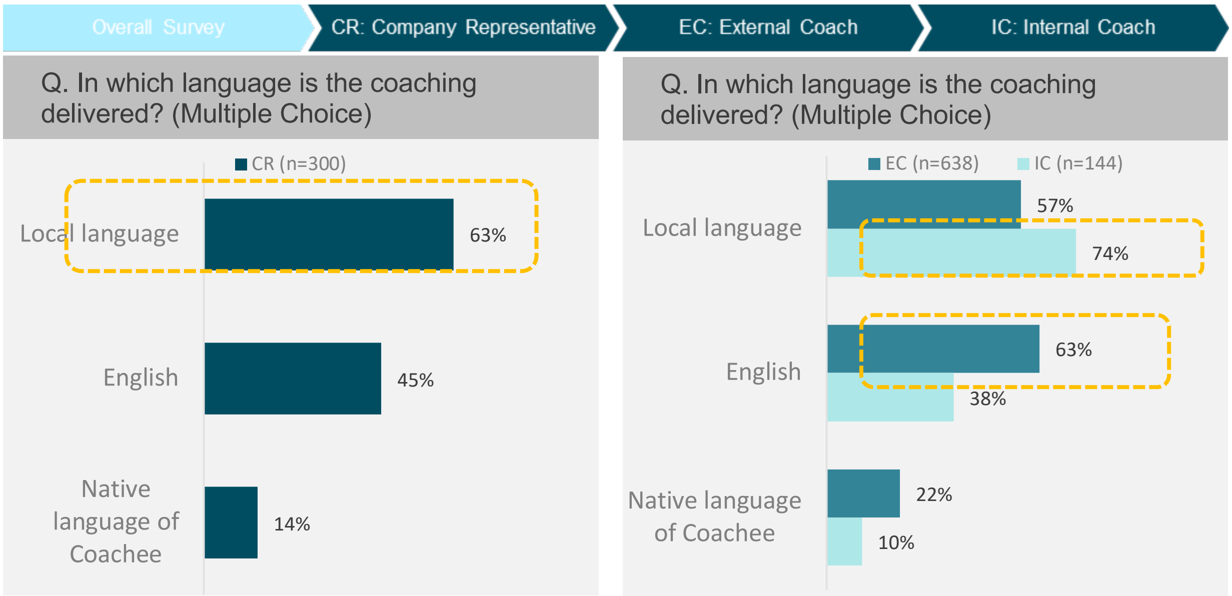
For companies coaching in the local language is the most prevalent (63%), followed by English (45%) and native language (14%)

For ICs coaching in the local language is the most prevalent (74%) followed by english (38%) and native language (10%)

ICs are more aligned to the demand of coaching in the local language

For ECs coaching in English is the most prevalent (63%) followed by Local Language (57%) and and native language (22%)

It is possible that ECs may be meeting the English speaking or native-language coaching demand.



Something to ponder:

As coaching expands to the local industry sectors, there may be a further increase in the demand for coaching in local language, will this increase opportunities for coaches who can speak the local language?

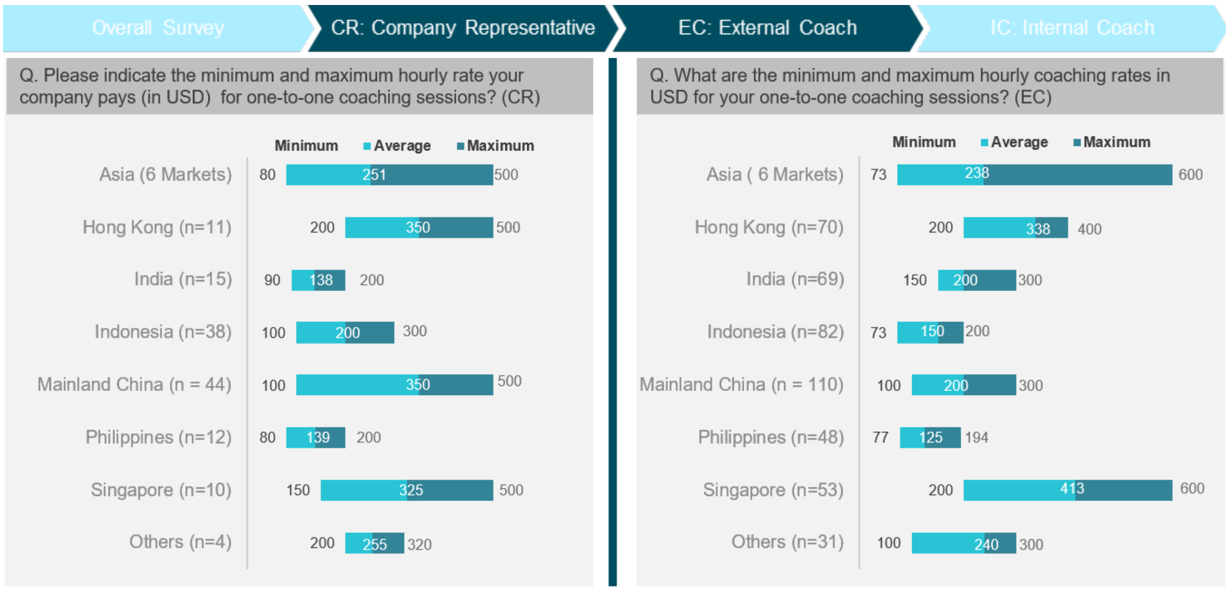
3.11 Coaching Rates

Coaching rates differ by markets.

Coaching rates range from USD80 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 large similar to what ECs reported, except in markets like India, Mainland China and Singapore.



Something to ponder:

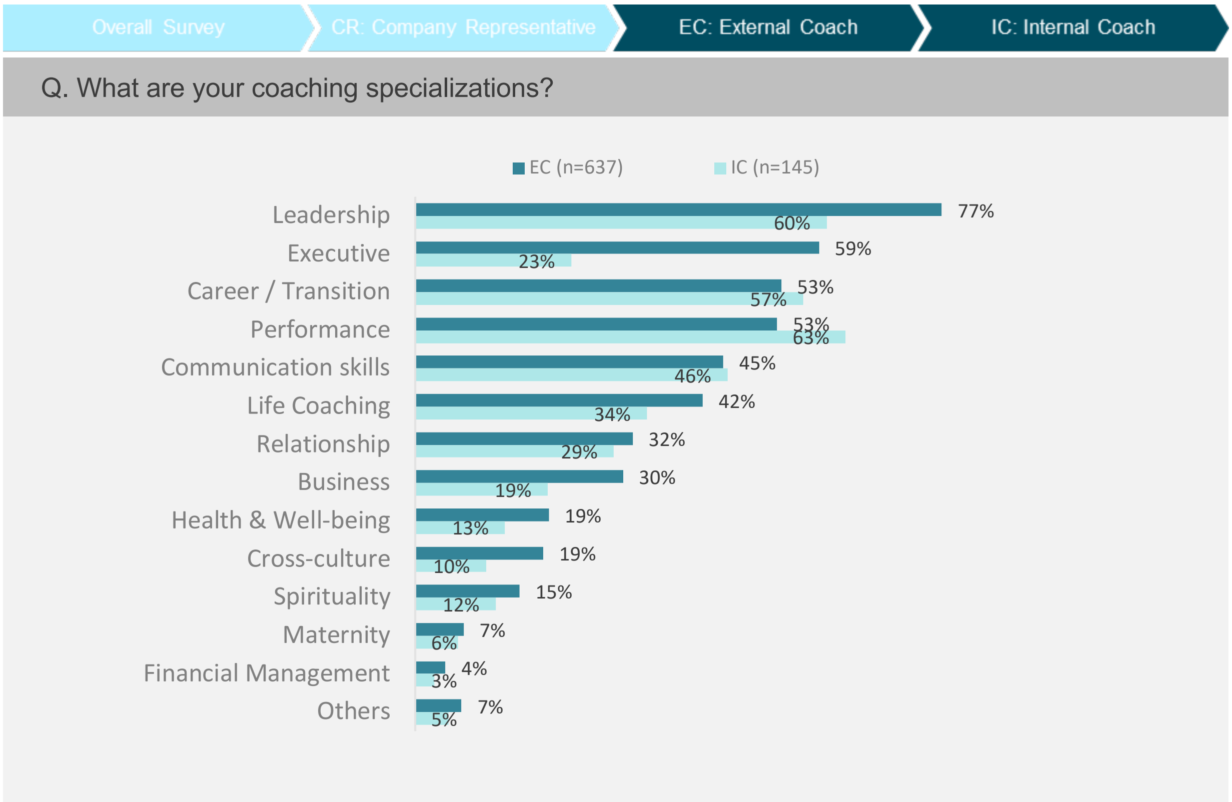
The range of coaching rates perceived by companies seem to be higher than those quoted by coaches. Could this gap explain the reason why the coaching services are perceived as being expensive?

3.12 Coaching Specializations

While there is a significant overlap in the areas of specializing for EC and IC; EC specializations are more wide spread and they are creating new niches for themselves

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 Career/Transition and performance coaching.

EC are creating new and unique niches for themselves like Life 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?

3.13 Range of Coaching & Related Services

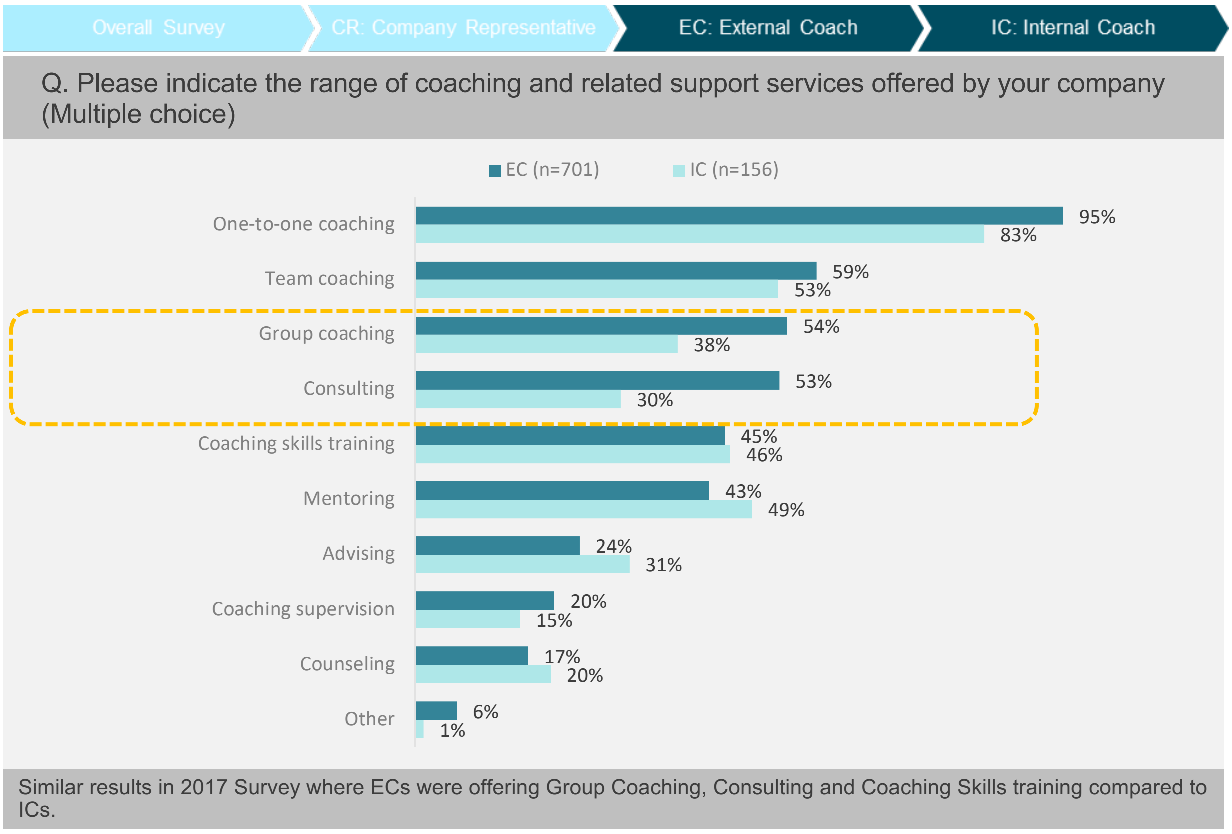
Coaches offer a wide range of services with one-to-one coaching being the highest reported

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 95% and 83% respectively.

ECs offer significantly more Group coaching (54% vs 38%) and Consulting (53% vs 30%), ICs offer more mentoring (49% vs 43%) advising (31% vs 24%)

Both ECs and ICs offer coaching skills training to the same extent.

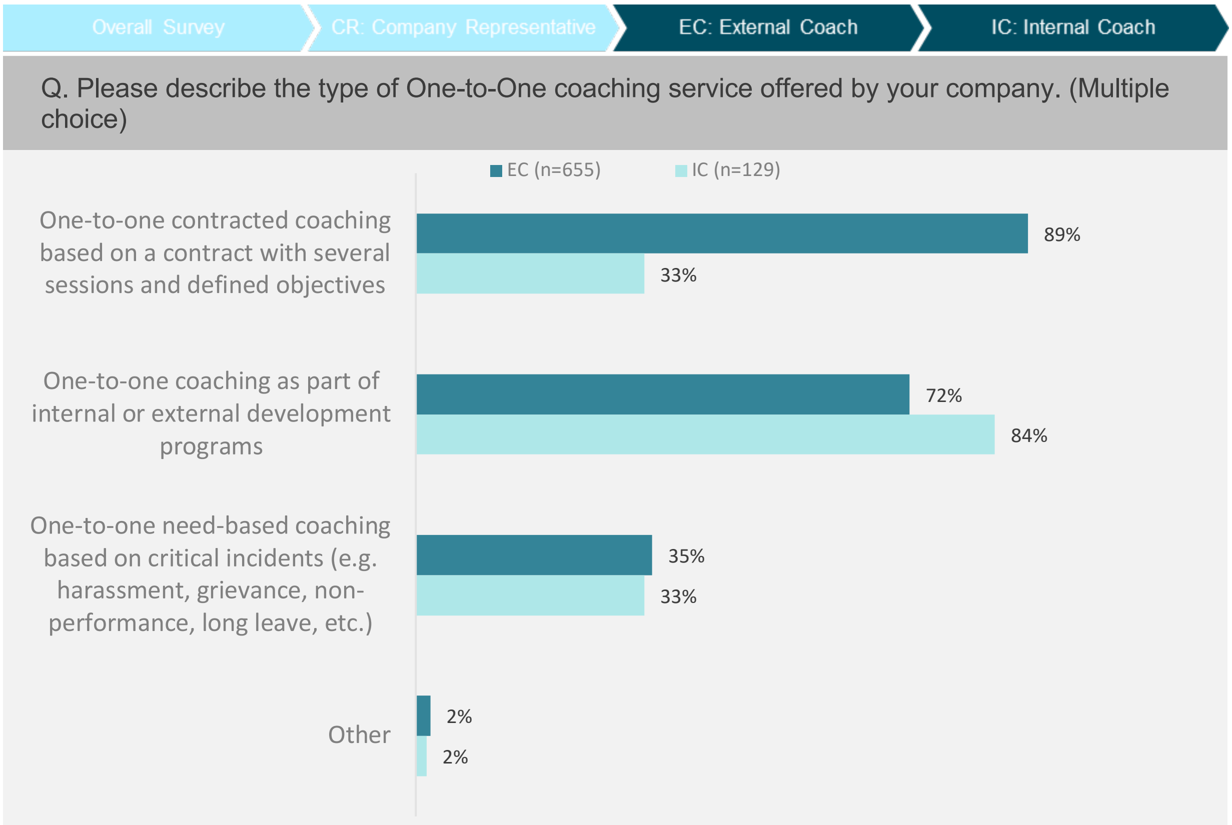
This trend is similar to the 2017 survey results



3.14 Range of Coaching & Related Services – cont.

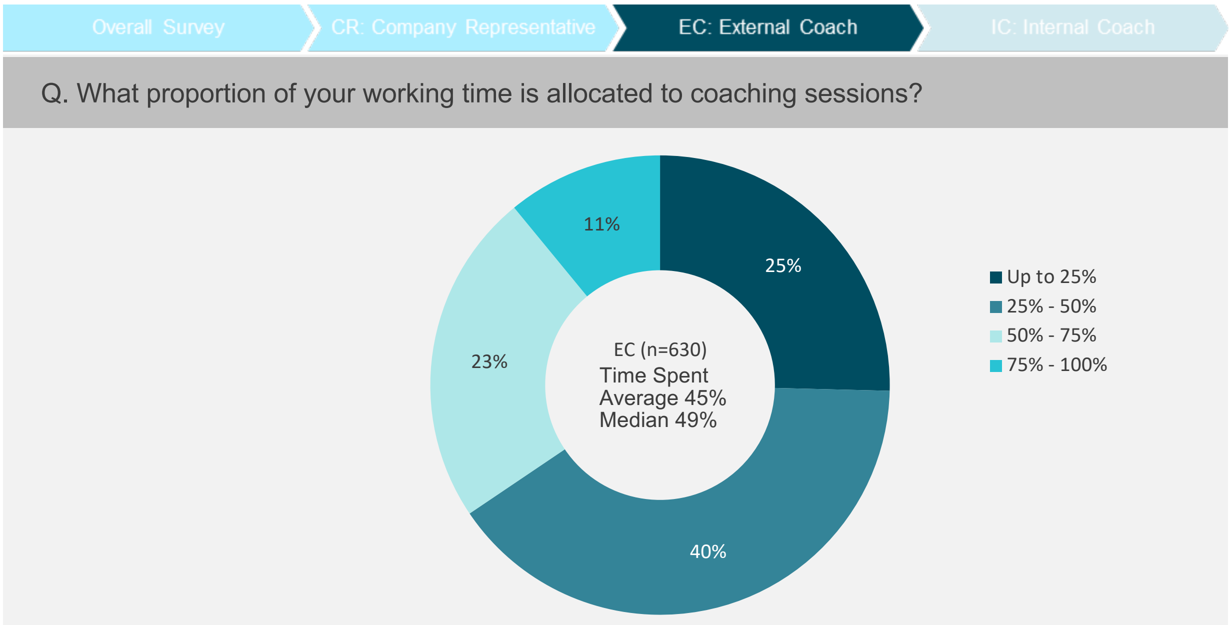
ECs offer significantly more contract-based one-to-one coaching as compared to ICs (89% vs 33%) while ICs offer more one-to-one coaching as part of development programs (84% vs 72%). This is understandable as ICs offer coaching as part of their job role.

Need-based coaching and coaching on critical incidents like performance, harassment etc. is offered equally by both EC and IC (35% and 33%)



3.15 Proportion of Work-time Devoted to Coaching Sessions

ECs spend 45% of their total working time on delivering coaching sessions.

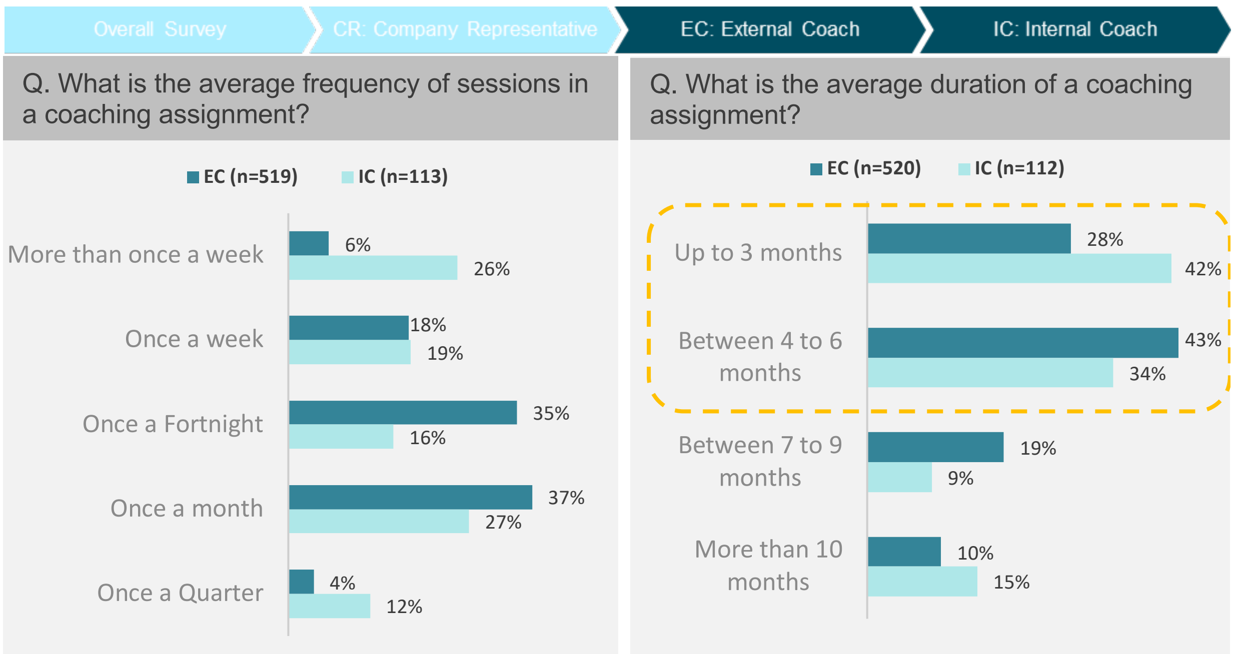


3.16 Frequency and Average Duration of Coaching Assignments

ICs deliver one-to-one coaching sessions more frequently, while ECs offer coaching assignments of a longer duration

ICs deliver coaching sessions more than once a week (26%) or monthly (27%) and a coaching assignment lasts for less than 3 months (42%) for up to 6 months (34%)

ECs deliver coaching sessions once a fortnight (35%) or monthly (37%) and a coaching assignment usually lasts for 4 to 6 months (43%)



3.17 Engagement and Perception of Internal Coaches

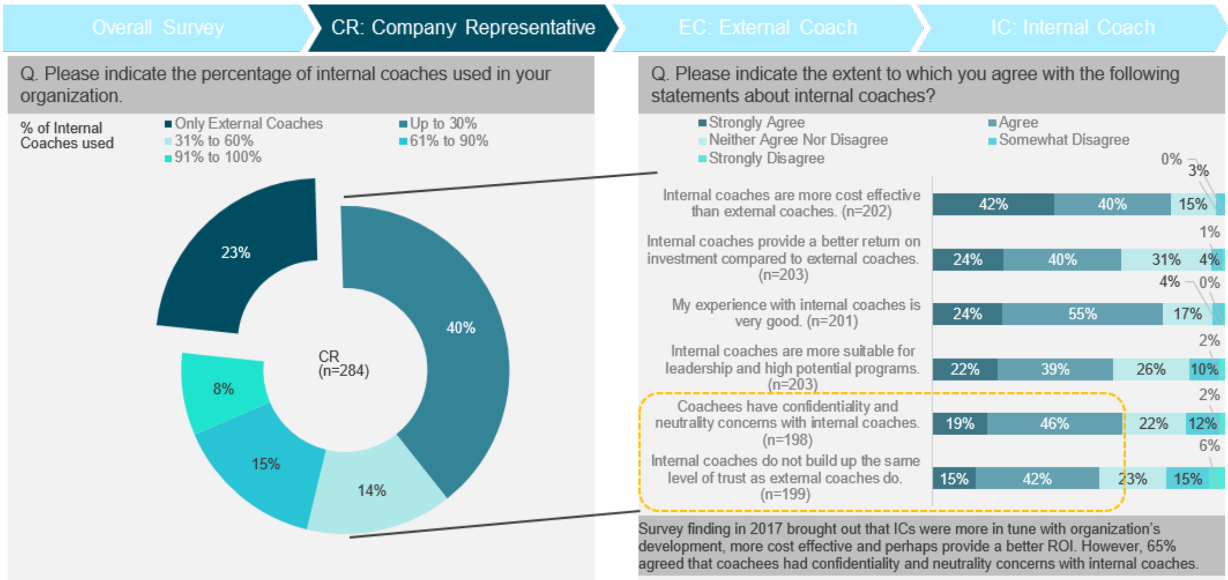
77% Companies report that they use ICs to some extent and majority are satisfied with their service

23% of companies engage only ECs to meet their coaching needs, while 8% of the companies are almost fully dependent on ICs. Remaining 69% 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, 61% companies agree that ICs are more suitable for leadership and high potential development programs.

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?

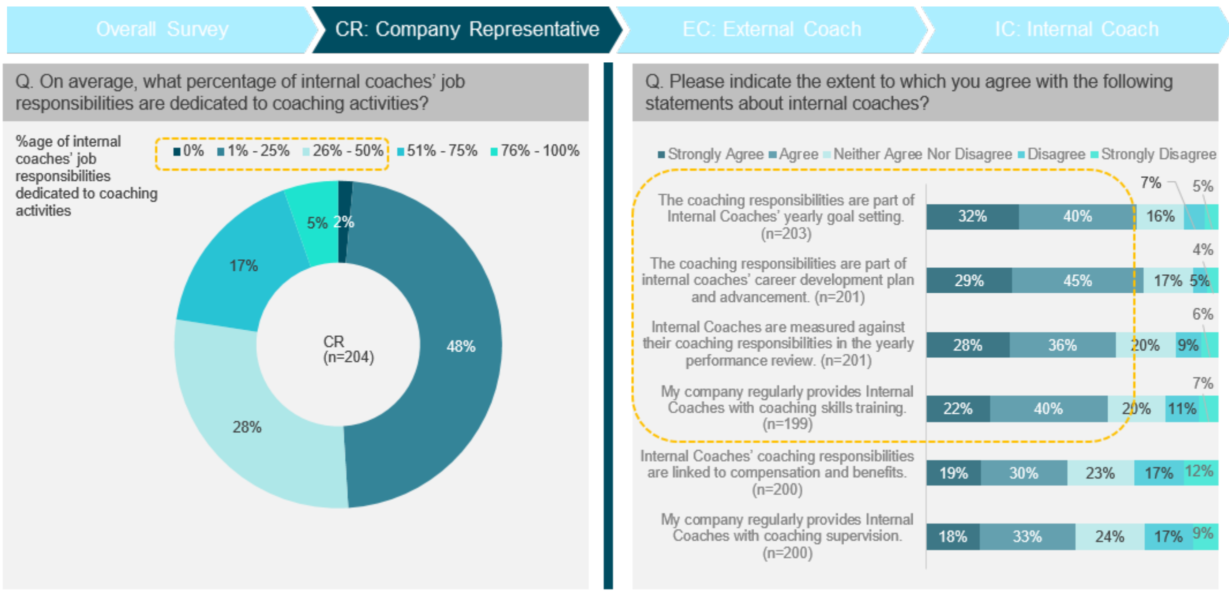
3.18 Responsibilities of Internal Coaches

ICs coaching role is less than 25% of their overall job responsibility

Nearly 50% of the companies report that ICs coaching role is less than 25% 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%). While 49% companies say coaching responsibilities are directly linked with compensation and benefits, 29% companies disagree with it.

62% companies provide coaching skills training and 51% 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?

3.19 Medium of Coaching Assignment Delivery

Face-to-face sessions is the most used delivery medium for coaching

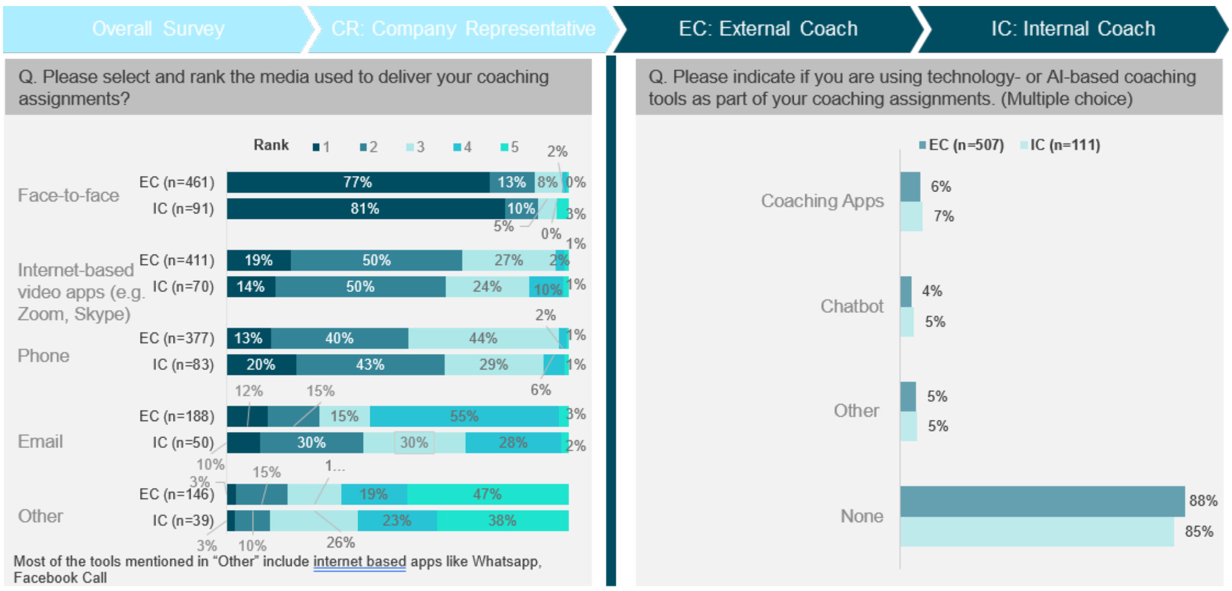
Face-to-face in-person meeting is the most used medium for delivery of coaching. 90% ECs and 91% ICs rank it as No.1 and 2, followed by virtual face-to-face meeting via Zoom or Skype at 69% ECs and 64% ICs

Coaching delivery by phone is also commonly used (53% ECs and 63% ICs)

It is interesting to take note that only 6-7% coaches are using coaching apps and 4-5% coaches are using Chatbots.

88% ECs and 85% ICs are currently not using any AI tool.

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



3.20 Profile of Typical Coachees

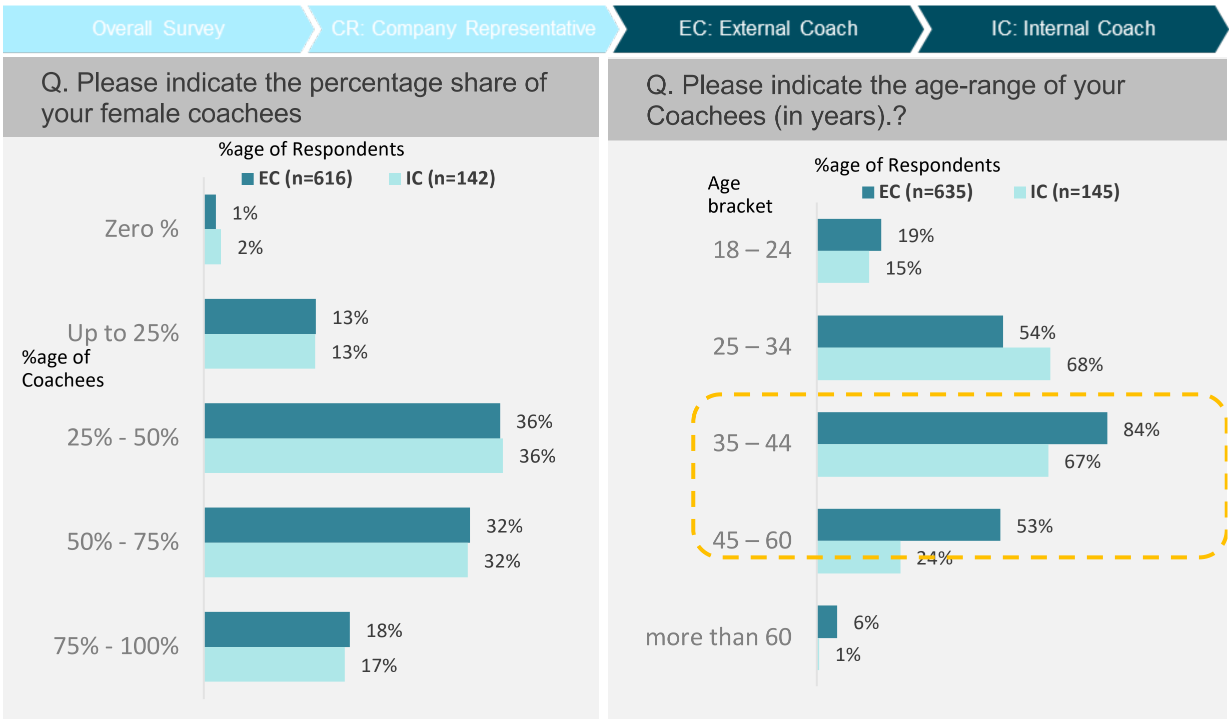
Age-range of clients for ECs is higher than ICs and both coach a small percentage of millennial / Gen Z clients*

On an average, 50% (median) of the coachees are female and the distribution does not vary for ECs and ICs.

The age-range of coachees for ECs is 25 – 60 years, with the highest being 35-44 years (84%) followed by 25-34 years (54%) The age-range of coachees for ICs is 25-44 years, with the highest being 25-34years (68%) and 35-44 years (67%)

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 (19%) and IC (15%) have coachees in the age-range of 18-24 years.



*Anyone born between 1981 and 1996 (ages 23 to 38 in 2019) is considered a Millennial, and anyone born from 1997 onward is part of a new generation (Gen Z) – pewresearch.org

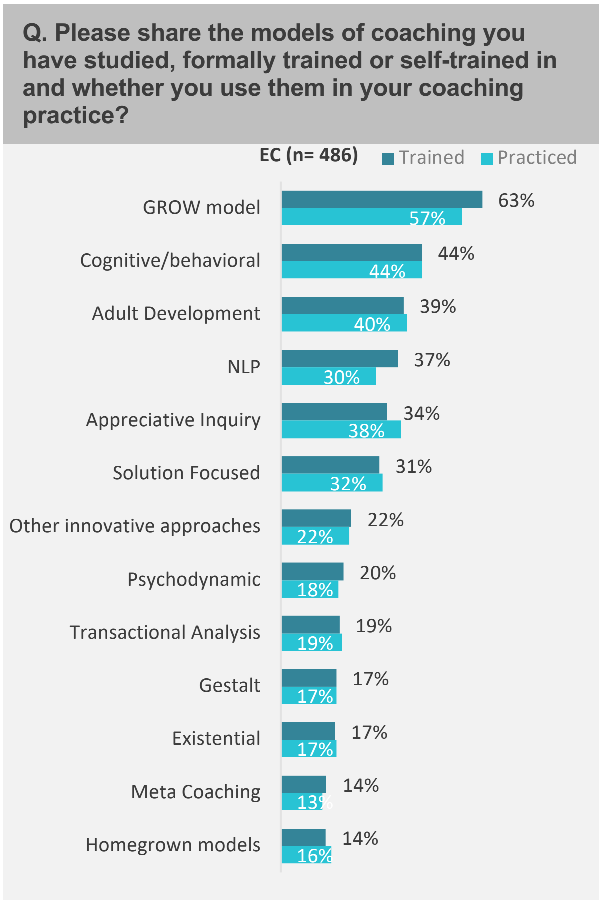
3.21 Coaching Models – Trained versus Practiced

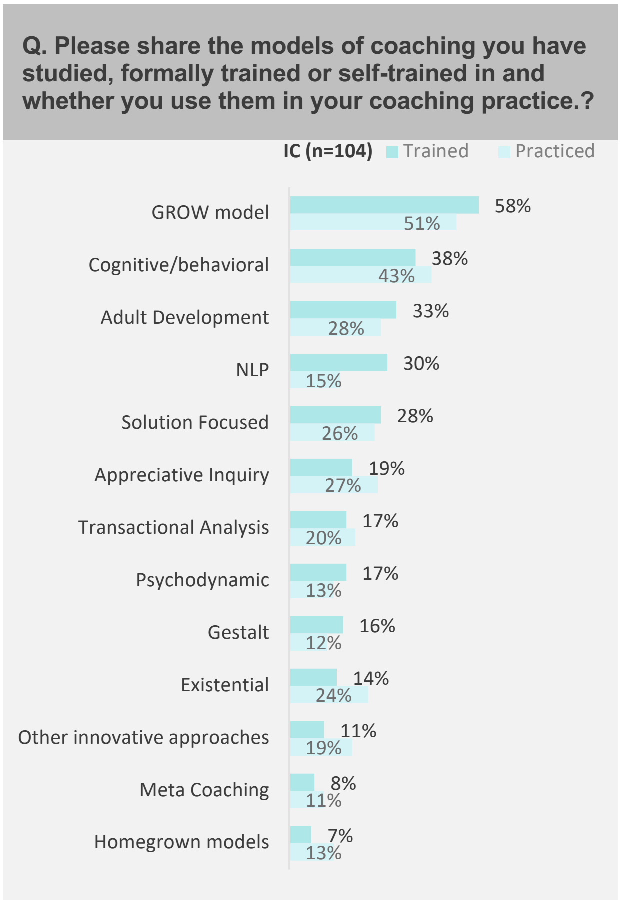
Wide variety of coaching models and theories being practiced by ECs and ICs. Training vs practice is more consistent for ECs

Most used coaching models/theories reported are GROW Model, Cognitive/Behavioral and Adult Development theory. 63% ECs say they have trained in GROW model and 57% say they practice it in coaching. Similarly, 58% ICs are trained in GROW model and 51% say they practice it. Cognitive or Behavioral model is also trained in and practiced by both ECs and ICs. Roughly 1/3 of ECs and ICs are trained in Adult Development

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, Appreciative Inquiry and Existential theory.

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach





3.22 Diagnostic Tools Used in Coaching

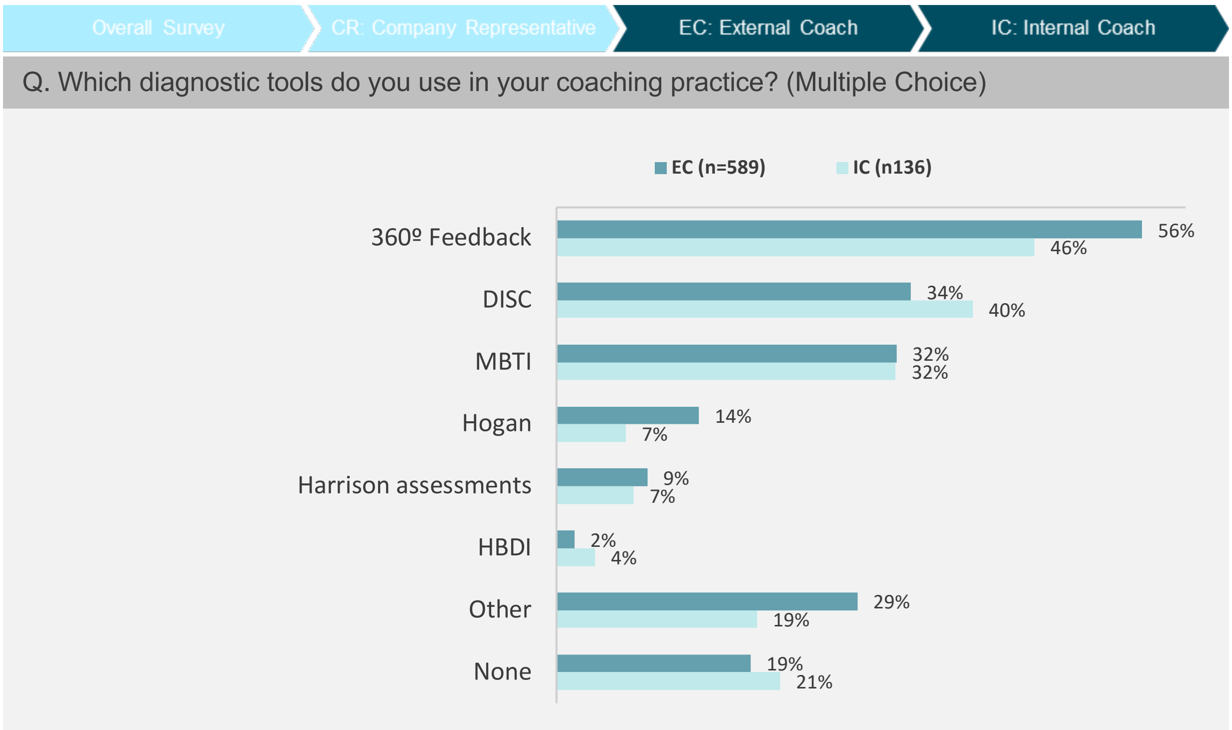
Majority of coaches use 360* Feedback (EC 56%, IC 46%)

Other tools being used are, DISC EC 34%, IC 40%) and MBTI (32%), Hogan (EC 14%, IC 7%)

29% ECs and 19% ICs use a variety of other diagnostic tools

19% ECs and 21% 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.



4. Coaching Beliefs and Philosophy

4.1 Understanding of coaching

Prevailing understanding of coaching has elements of facilitation and guidance.

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

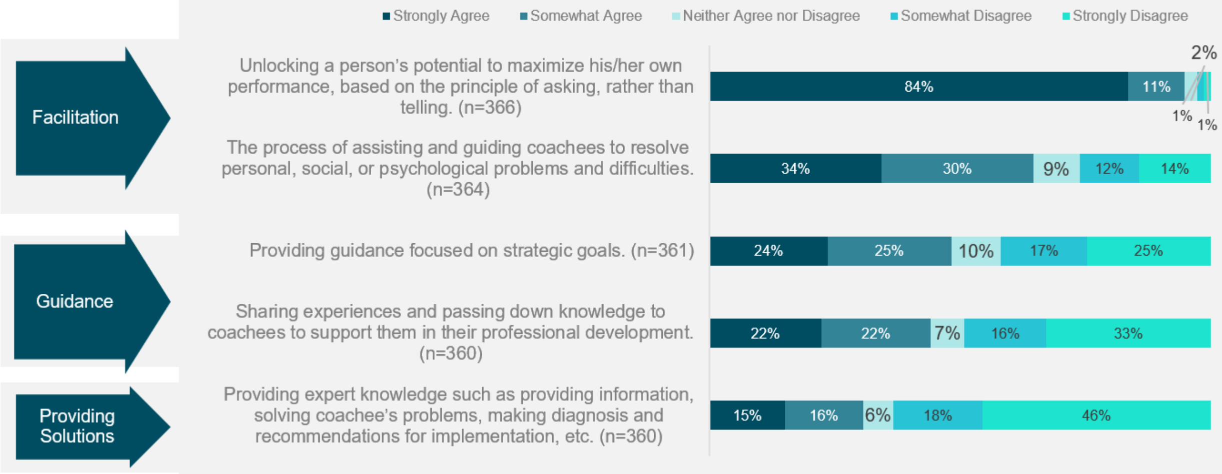
When we look at the two charts below, the first chart points out that 95% of the sample companies agree with the notion that coaching is facilitation. However, in the second chart, when asked if coaching should focus primarily on facilitating self help, the percentage dropped for both companies (80%) and coaches (ECs 87% ICs 80%).

Interestingly, if we just look at ‘strongly agree’, the percentage dropped significantly from 84% to 36% for companies and 56% for ECs & 41% for ICs.

This shows 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.

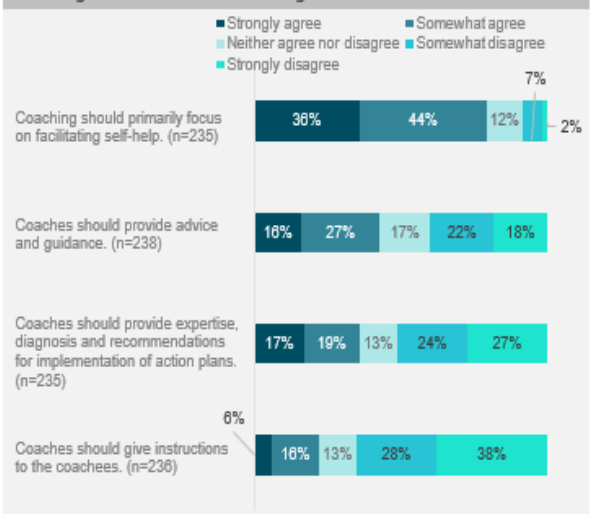
Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

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

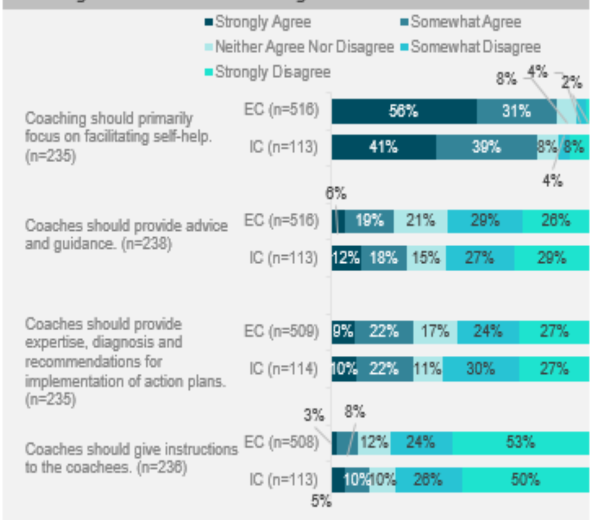


Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

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

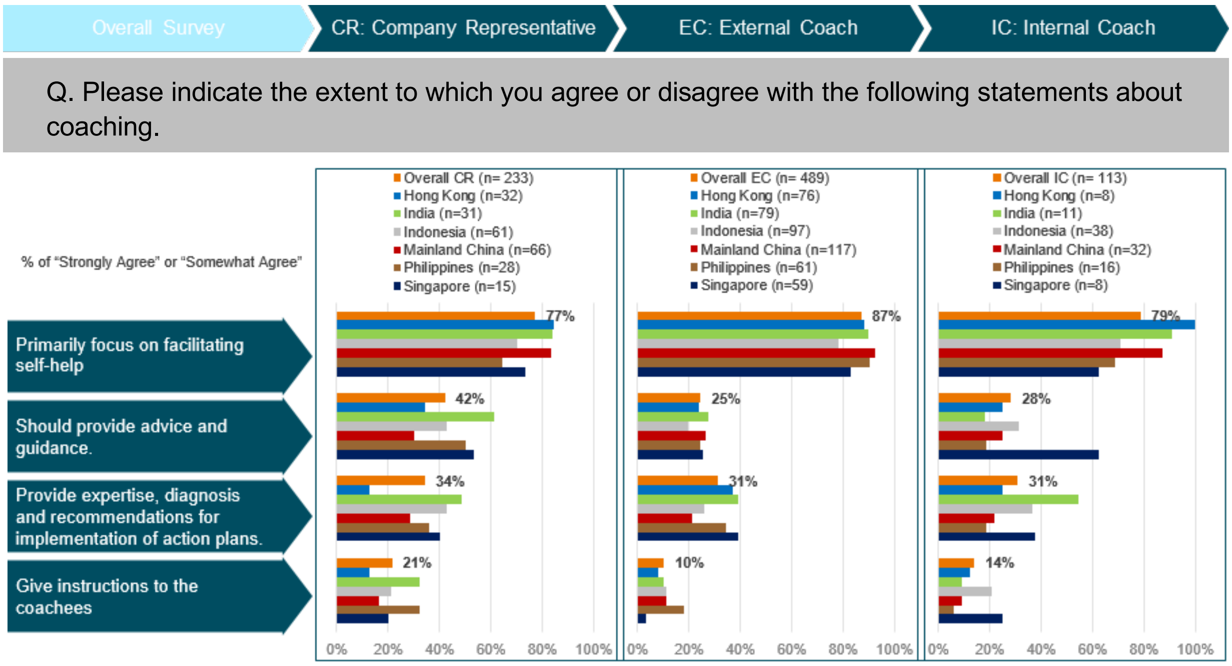


Q. Please indicate the extent to which you agree or disagree with the following statements about coaching.



Similar trends appear in all six markets

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



Something to ponder:

Could this 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?

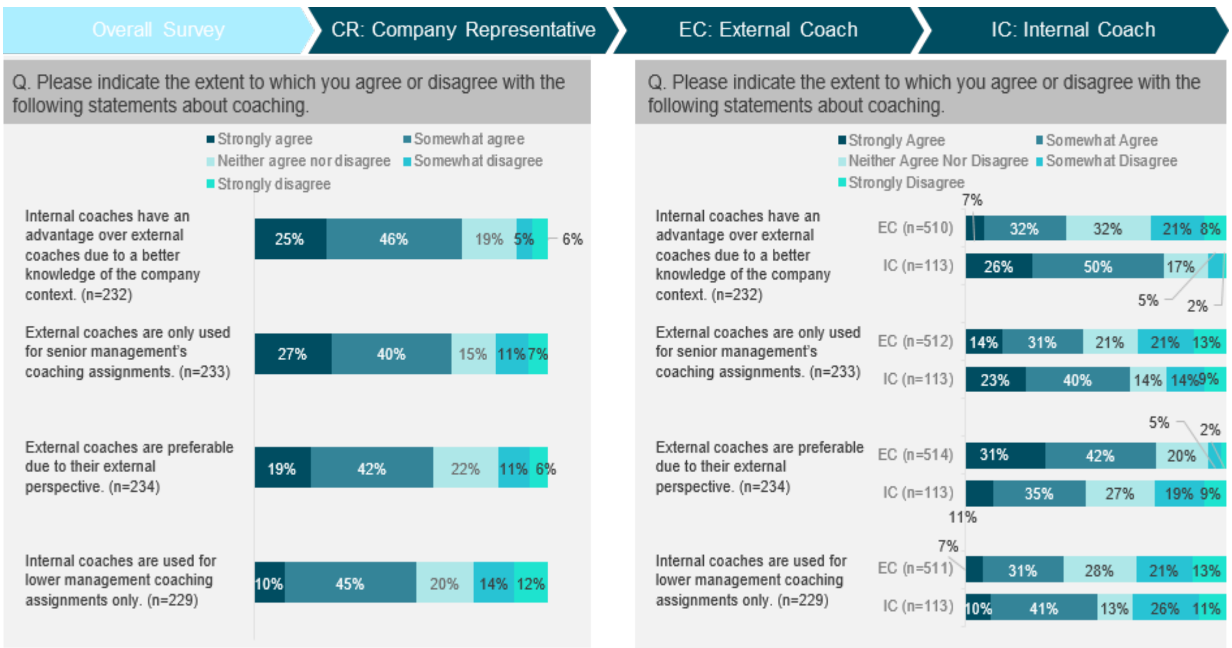
4.2 Beliefs about Internal and External coaches

Marked differences in perceptions & preferences of ECs and ICs and CRs

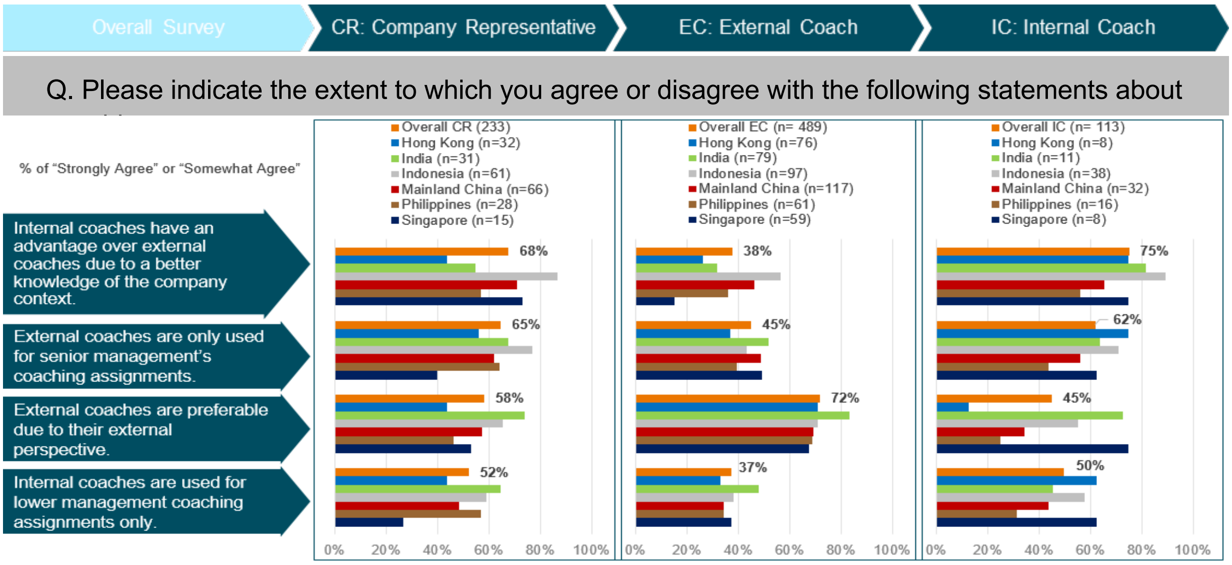
While 71% of CRs and 76% of ICs believe that 'internal coaches have an advantage over external coaches due to a better knowledge of the company context' only 7% of the ECs 'strongly agree' and 32% 'somewhat agree'.

73% of ECs believe that 'external coaches are preferable due to their external perspective'. Only 46% of ICs (11% strongly agree) and 61% of CRs (19% 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', EC-45% and CR-67%, IC-63%. Similar variation between CR and EC found for lower management coaching.



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



Something to ponder:

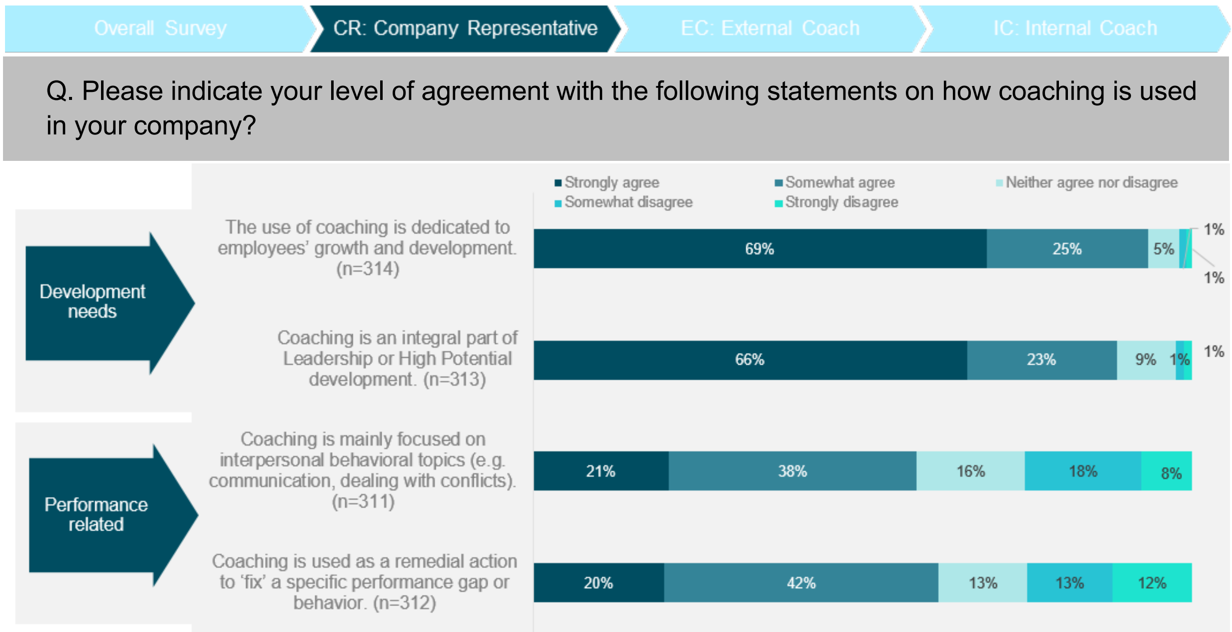
Perhaps the variance in perception is natural and inherent due to the competitive and overlapping nature of their work, is there also a need for realignment in understanding of the market for CRs, ICs and ECs?

4.3 Expected Organizational Goals for Coaching

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

More than 90% 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 (59%) and remedial (62%) coaching.

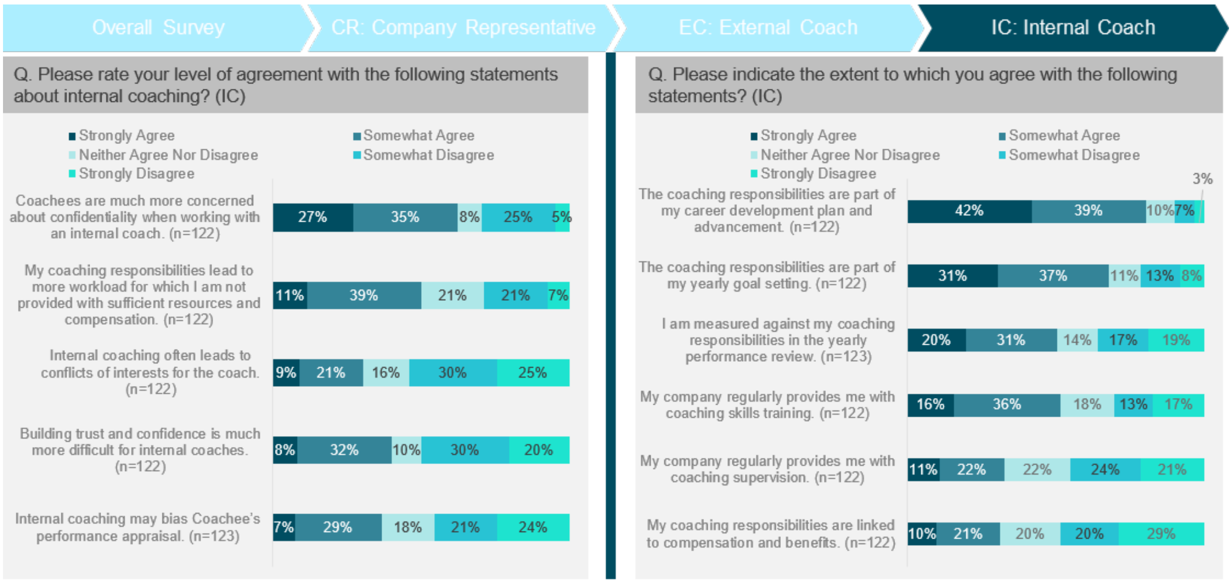


4.4 Opinion of Internal Coaches – Dynamics

Challenges of internal coaching role

While 81% ICs tend to agree that coaching is a part of their job and career development, about half feel their work is not linked to their compensation (49%), but are given sufficient coaching skills training (52%).

62% ICs tend to agree that confidentiality may be seen as a concern by coachees, 50% disagree that trust and bias are an issue. Majority of ICs disagree that there is any potential conflict of interest (55%) and about half disagree that there is any bias in coachee's performance appraisal (45%).



Something to ponder:

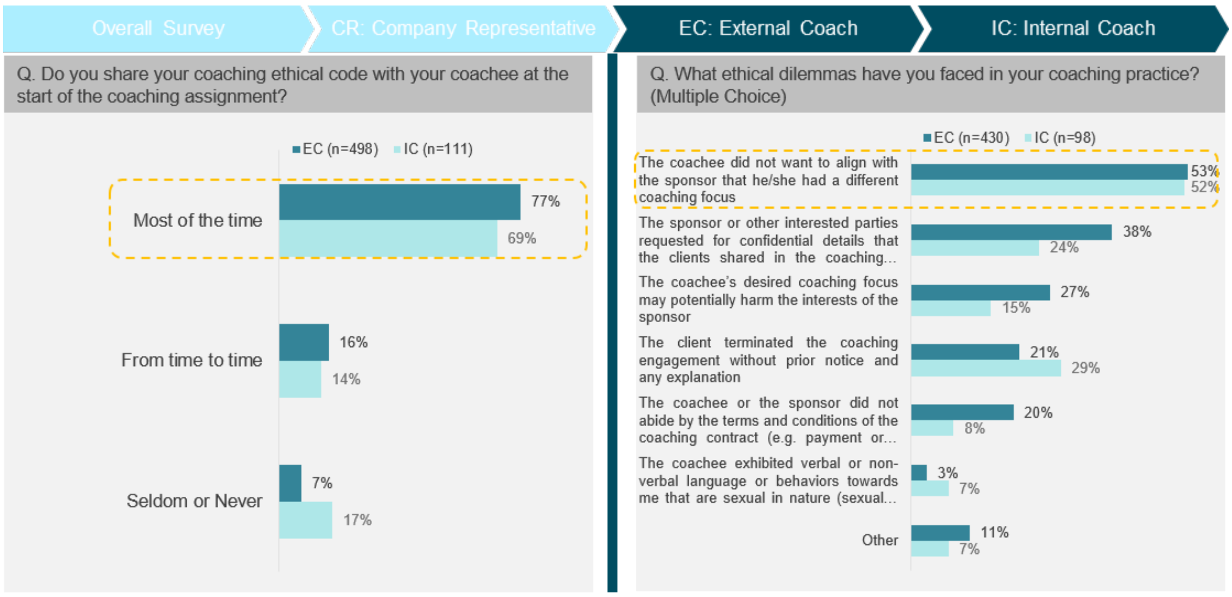
With internal coaching evolving as a role, what are the potential areas of development for ICs and companies?

4.5 Ethical Dilemmas Faced While Coaching

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

Most of the ECs & ICs share ethical code with coaches. Highest ethical dilemma is around difference in coaching focus (ECs 53% ICs 52%) of Coachee vs Sponsor.

38% of ECs and 24% of ICs report having experienced situations around sharing the confidentiality of the coachee's information. More ICs (29%) have faced premature termination of the contract than ECs (21%).



Something to ponder:

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

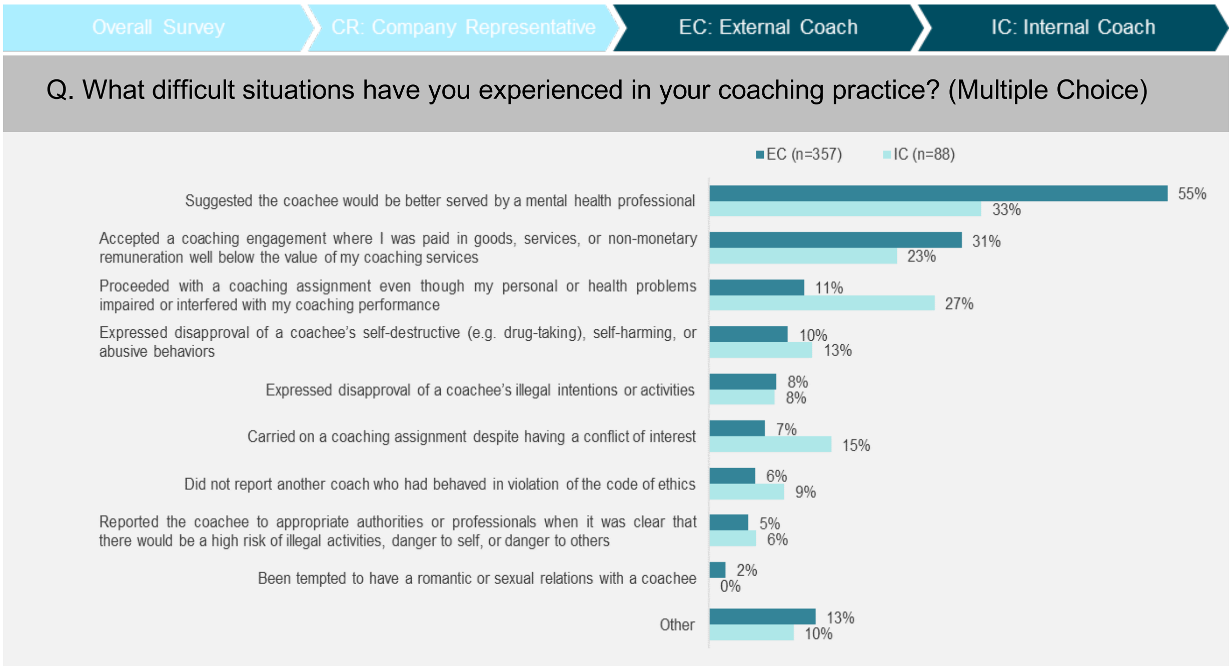
4.6 Difficult Situations Experienced While Coaching

One in two ECs and one in three ICs have recommended coachees to consult mental health professional

Coaching can be challenging and coaches report experiencing some difficult situations. A surprising number of coaches (EC 55%, IC 33%) say they have had to suggest that their coachee will be better served by mental health professional

It is interesting to note that ICs reported higher on two difficult situations:
- proceeding with a coaching assignment despite personal or health problems (11% vs 27%)

- carrying on the coaching assignment despite a conflict of interest (7% vs 15%).



Something to ponder:

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

What factors could potentially cause differences in ICs and ECs experience of difficult situations?

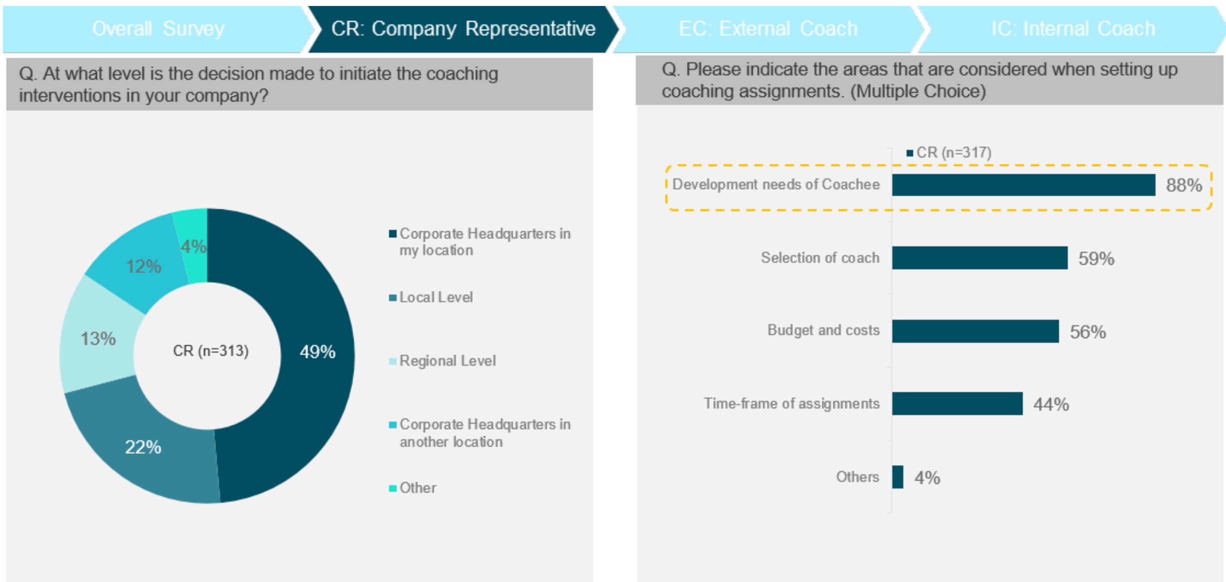
5. Coaches' Selections and Credentials

5.1 Setting up Coaching Interventions

Decision to initate coaching interventions mostly made at the Corporate headquarters

Majority of Companies responded that the decision to initiate the coaching interventions is at the Corporate headquarters, be it the respondees' location or at another location.

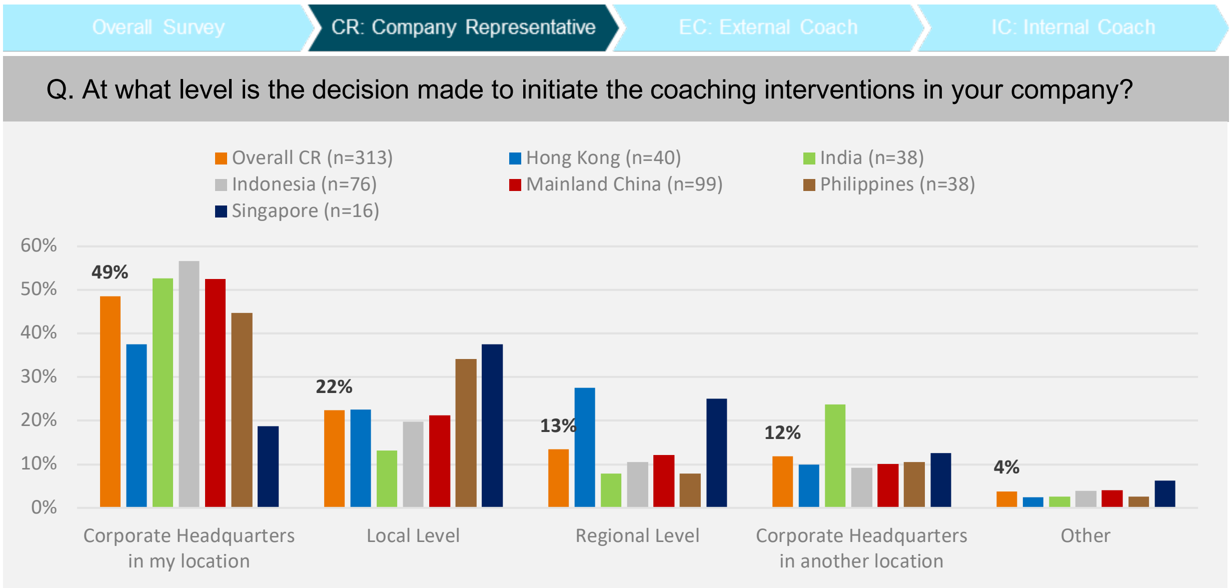
22% responded that the decision is are made at the local level while a little



more than 10% at the regional level.

This is also similar to 2017 Survey data where Corporate headquarters were mainly responsible for setting up the coaching intervention

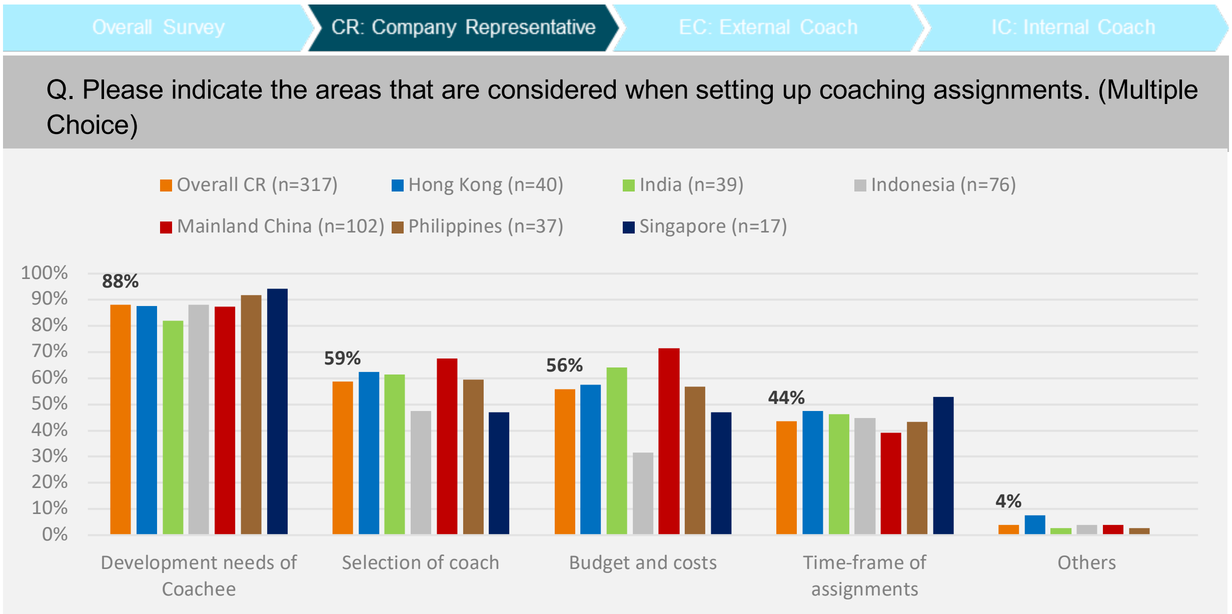
Similar results are reported across most markets with the exception of Singapore where decision is primarily made at the local level.



Something to ponder:

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

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



As indicated in the graph above, development needs of coachees is the most important area that is considered for setting up coaching assignments (88%). Other factors considered include selection of coaches (59%), budget and costs (56%) and time frame of assignments (44%). In the 2017 Survey, "Time-frame of assignments" and "Selection of Coach" were the two most important factors when considering setting up coaching intervention.

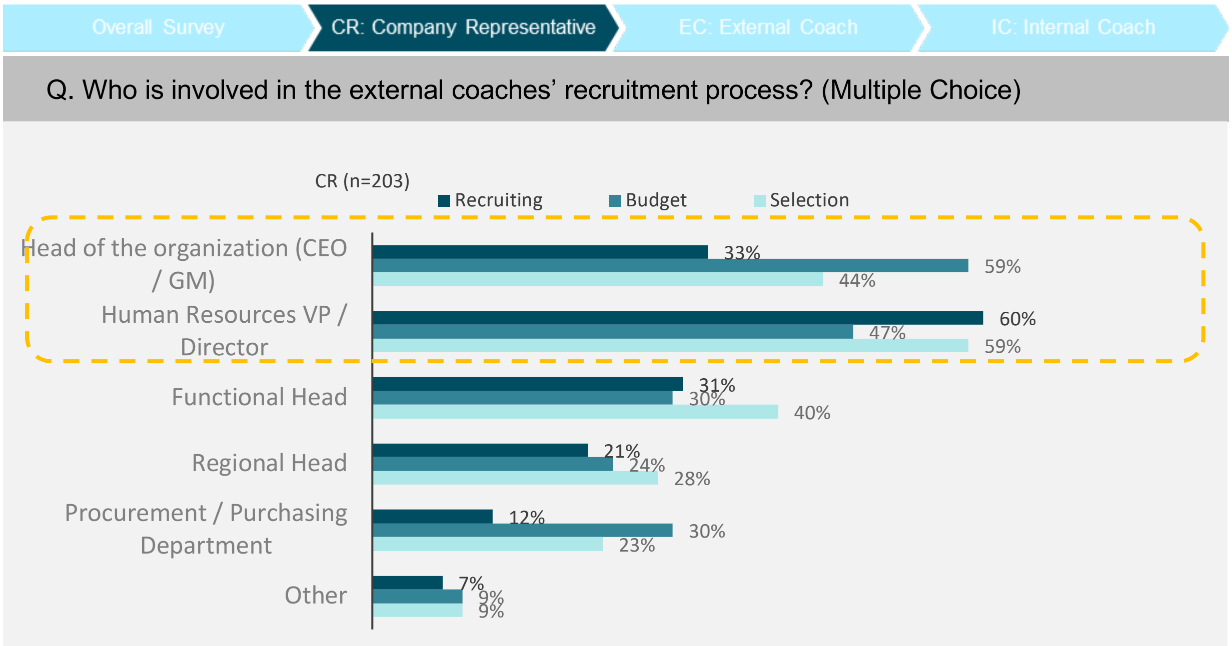
Something to Ponder:

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

5.2 Decision Makers For Coach Recruitment

Majority of CEO/GMs are involved in budgeting decisions (59%) while HR heads are involved in recruitment (60%) and selection decisions (59%).

In some companies, Functional heads, Regional Heads and Procurement departments are also involved.



5.3 Selection Criteria for Hiring External Coaches

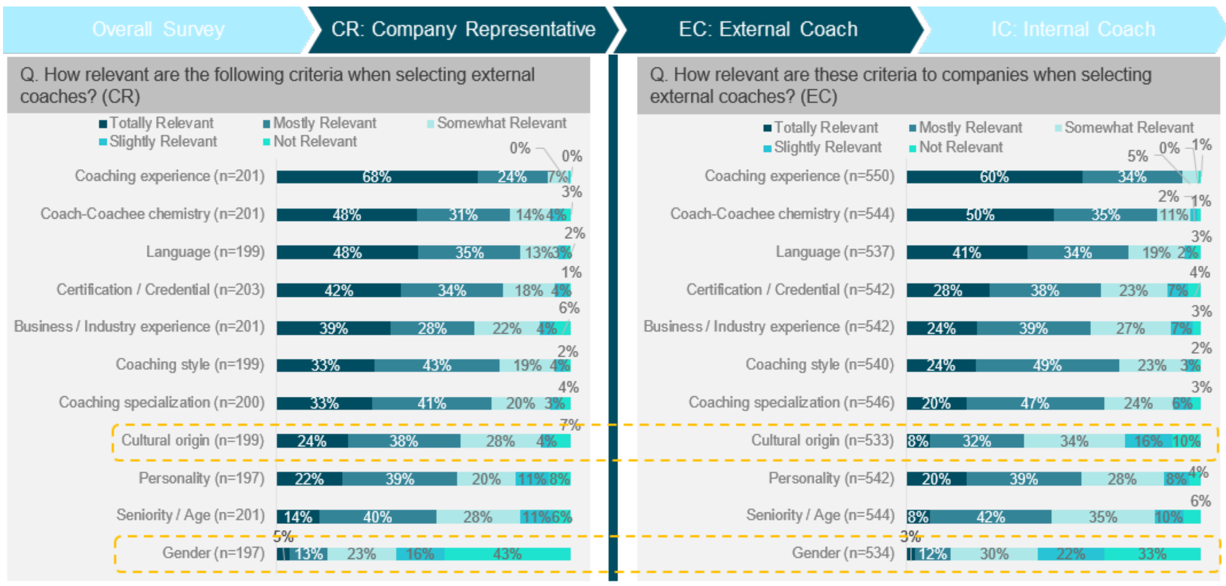
Top four selection criteria are Coaching Experience, Coach-Coachee Chemistry, Coaches' Credentials and Language.

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



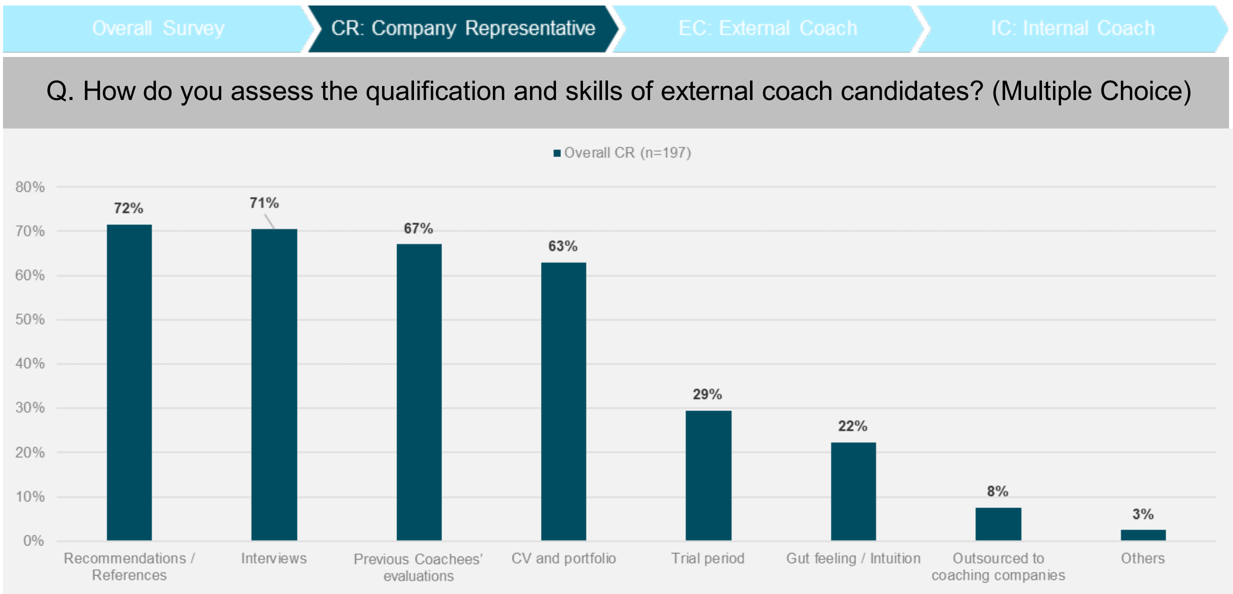
Something to ponder:

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?

5.4 Assessment of External Coach Candidates

Top three approaches Companies use to assess coaches are recommendations/references, interviews and previous coachees' evaluations.

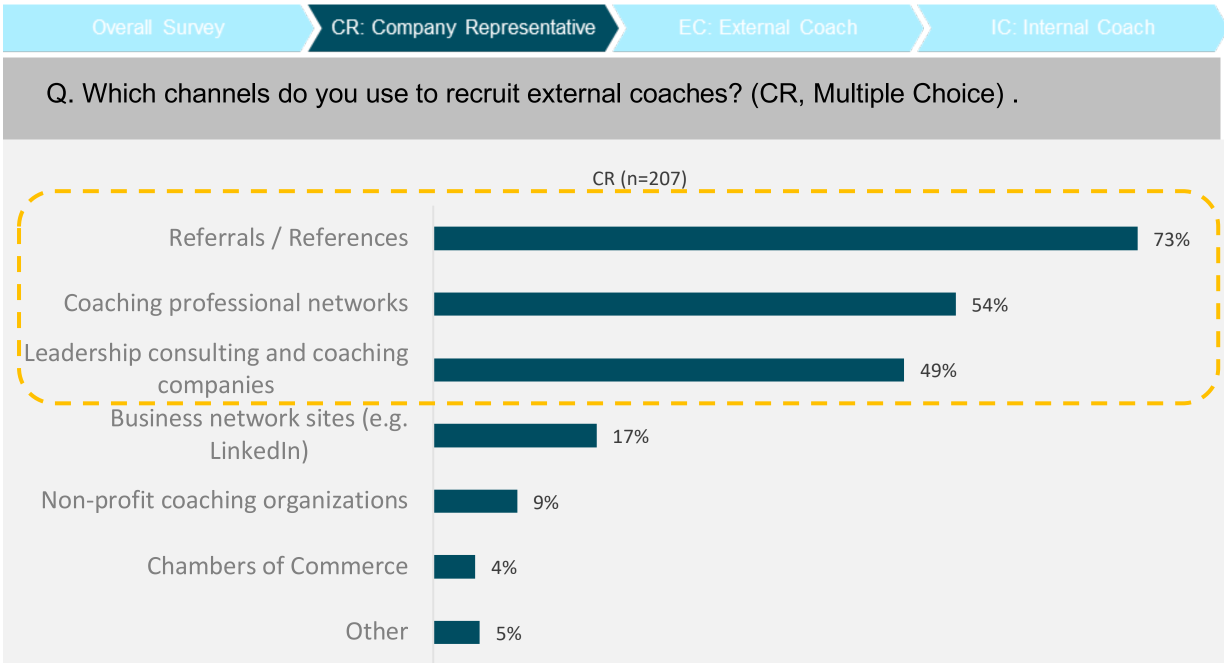
These were similar to 2017 survey results.



5.5 Channels for Hiring External Coaches

Top 3 channels that companies use for recruitment of coaches are:

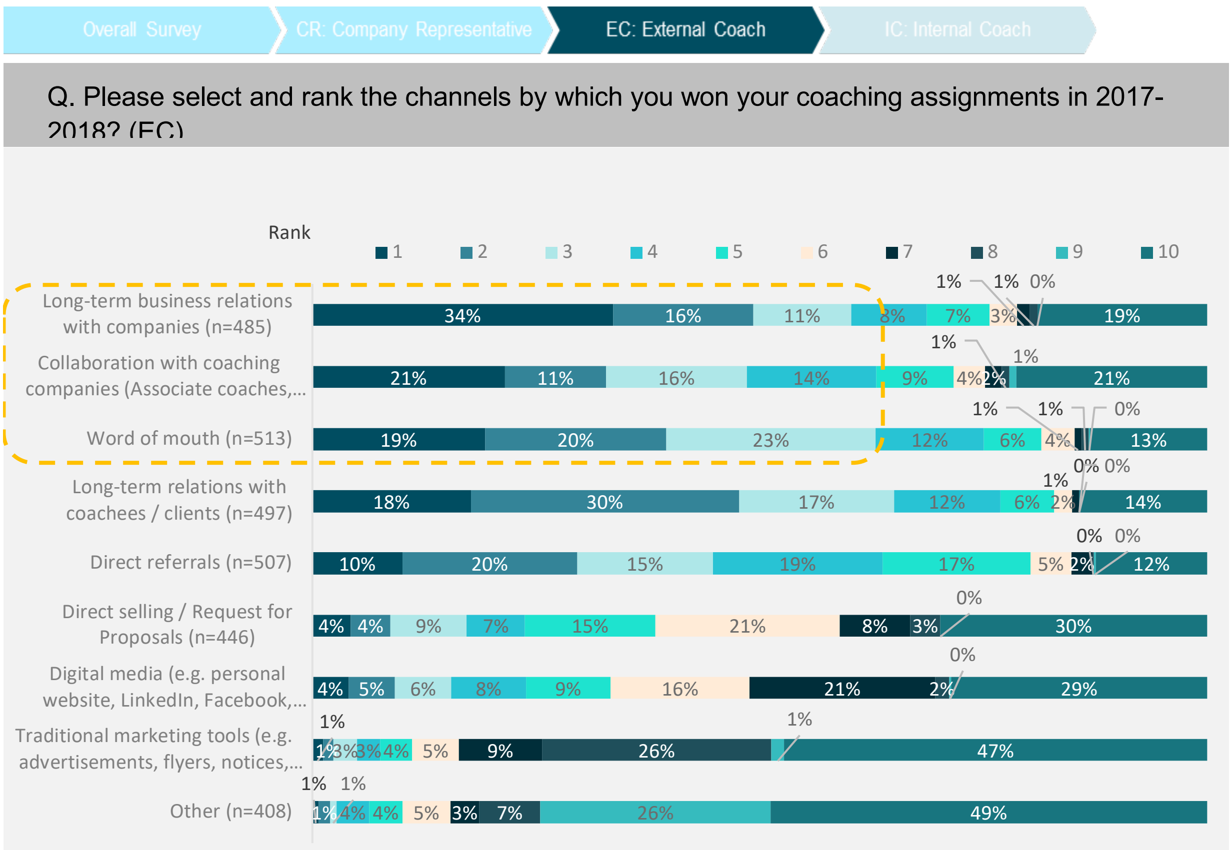
Referrals /Reference, Coaching professional networks and Leadership Consulting & Coaching companies.



Top three channels for ECs to win coaching assignments:

Long term business relations, collaboration with coaching organizations and word-of-mouth.

Coaches focus more on relationships rather than direct marketing to win coaching assignments



Something to Ponder:

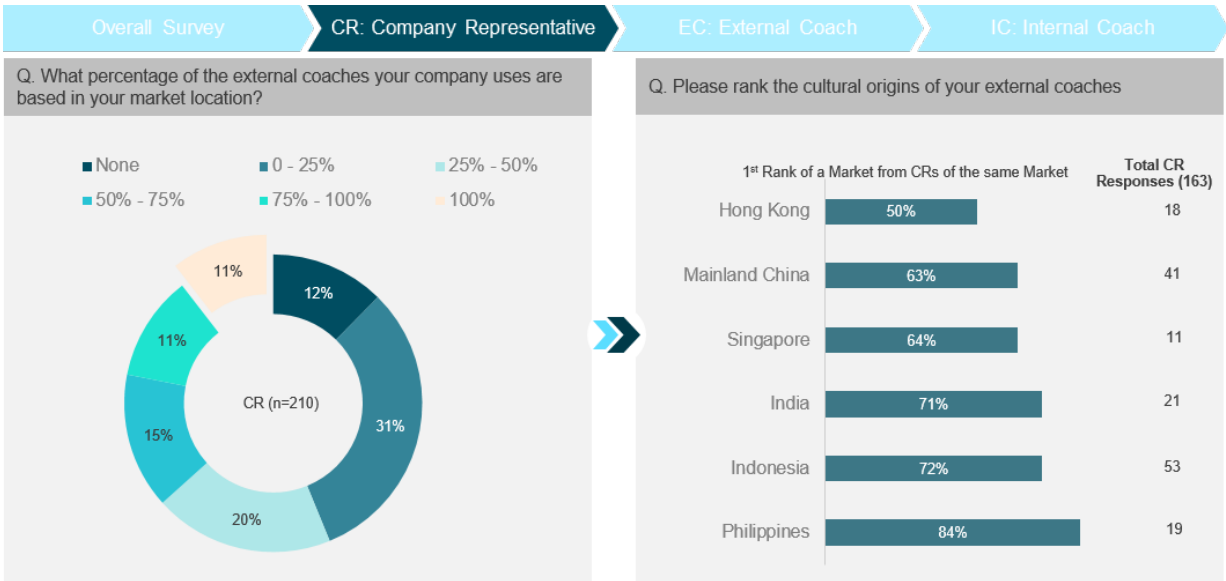
Since winning coaching assignments relies mainly on long-term relationships and word-of-mouth referrals, how can new coaches find entry into a relationship based coaching market? What channels could they use to market themselves?

5.6 Local Pool and Cultural Origin of Coaches

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

Roughly 2/3 of the companies (63%) 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.



Something to ponder:

Could overseas coaches be filling in a gap that local coaches could not meet? Or could this be the 'grass is greener on the other side' effect?

5.7 Cultural Origins of ECs

The top ranked cultural origin of the ECs Companies recruited is the same as the market the companies are located.

Other preferred cultural orgins include Europe, US, Singapore and Hong Kong.

Overall Survey | **CR: Company Representative** | EC: External Coach | IC: Internal Coach

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

Origin of Coaches

Origin of Organizations

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

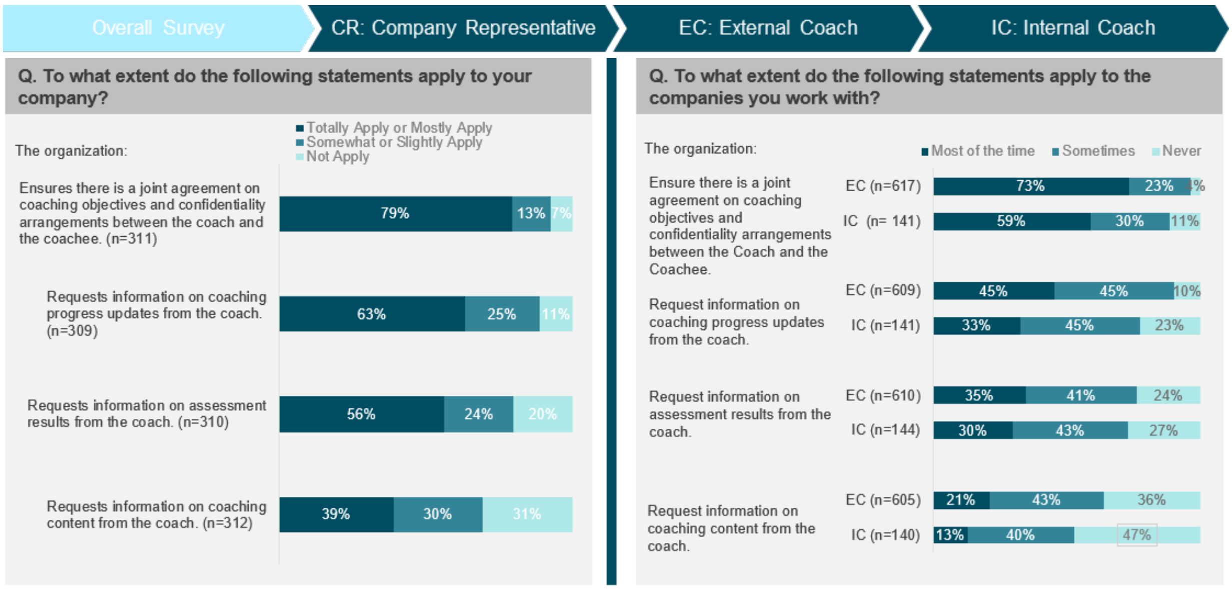
2nd Highest selection

3rd Highest selection

5.8 Coaching Process Setup

‘Boundaries’ of coaching process setup practices is work in progress

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.



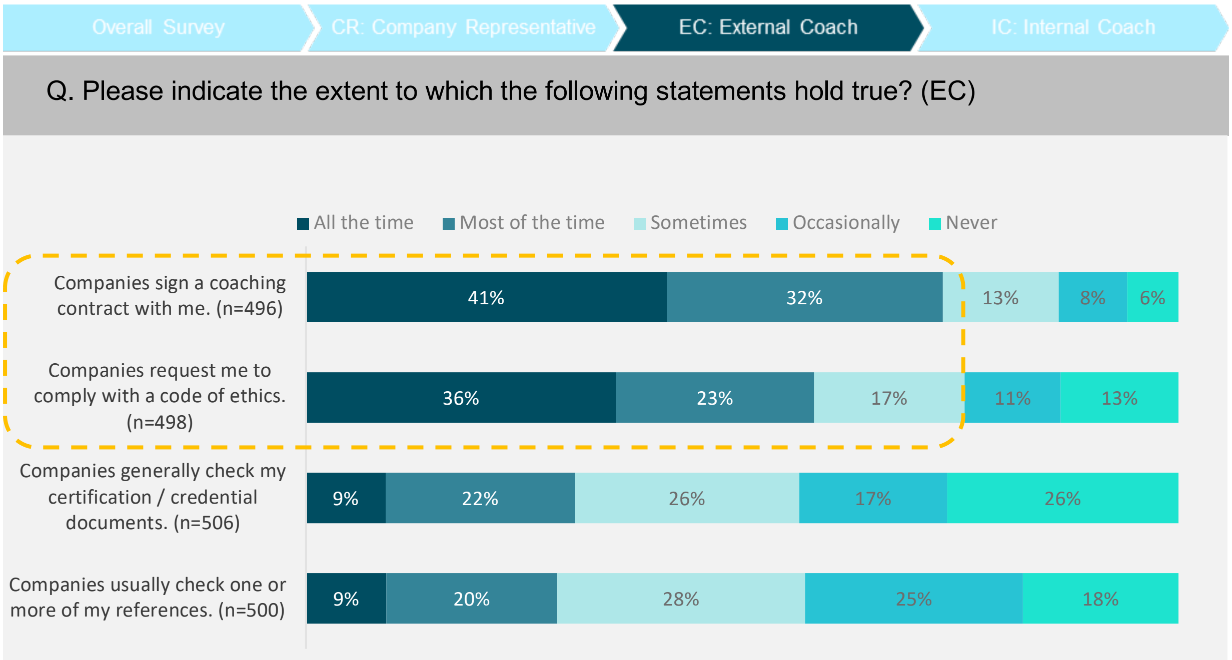
Something to ponder:

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?

5.9 Process Compliance by Organizations

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

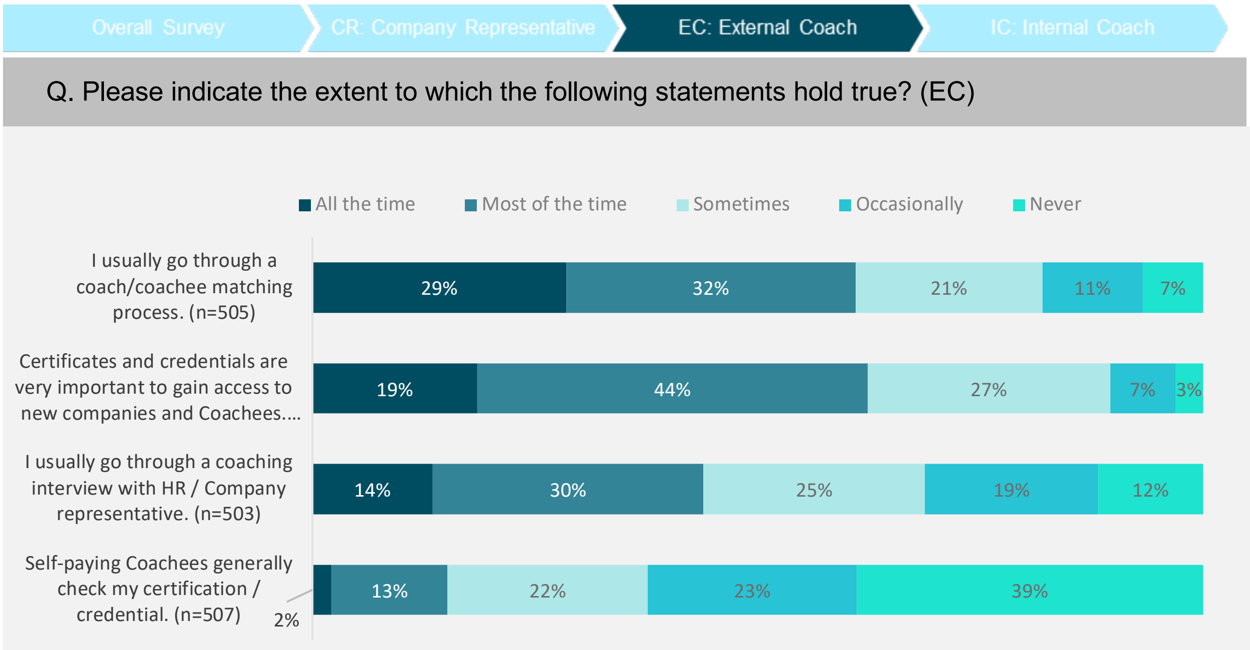
According to coaches, majority of companies comply with signing of coaching contracts and requesting ethics compliance, while they seem to be paying less attention on checking coaches' credentials and references.



5.10 Coaching Process Practices

Credentials seemed to be important for new companies and coachees but not to self paying coachees.

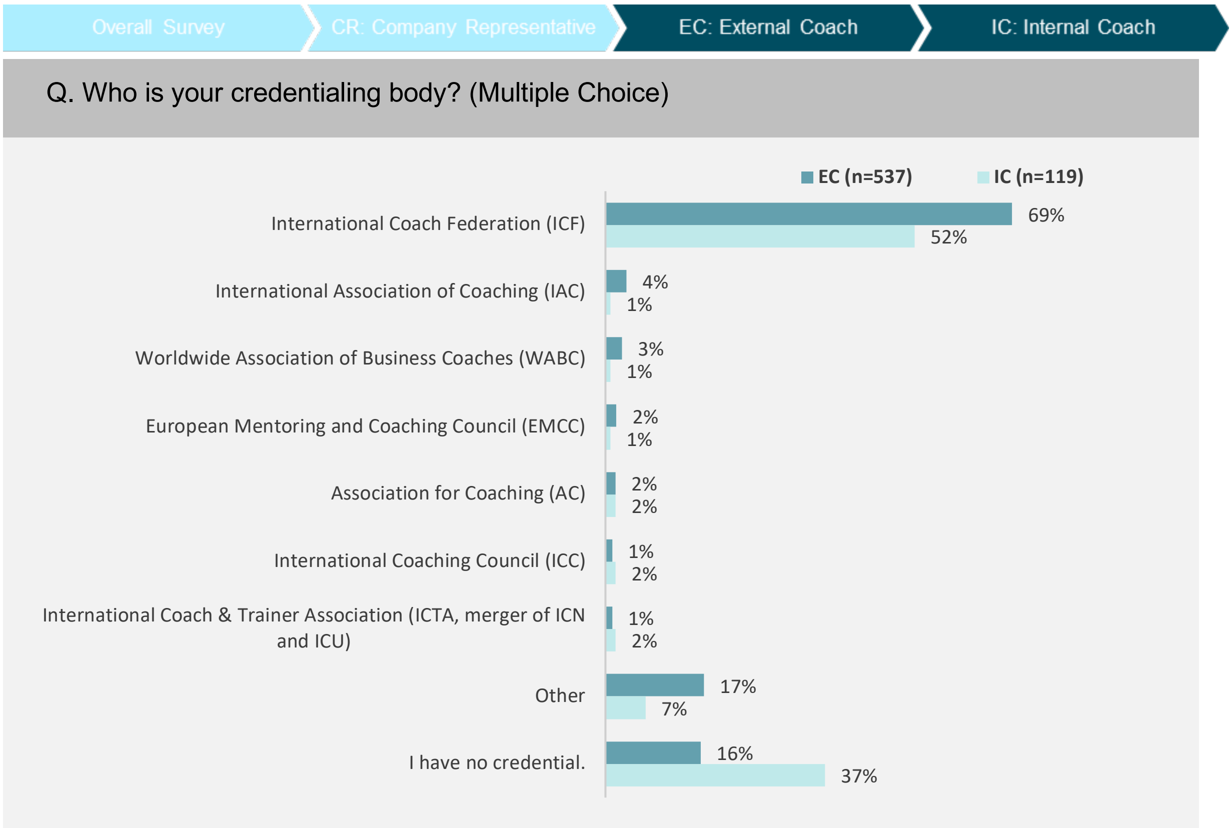
Majority of coaches claimed that they would usually go through a coach/coachee matching process and expressed that certificates and credentials are very important to gain access to new companies and coachees. Self paying coachees seem to care less about checking on credentials and certification of coaches.



5.11 Credentialing Body

ICF is the most popular credentialing body

Majority of coaches surveyed have accreditation from ICF. It is interesting to note that 16% EC and 37% of ICs have no formal credentials from any professional body.



5.12 Membership of Coaching Association

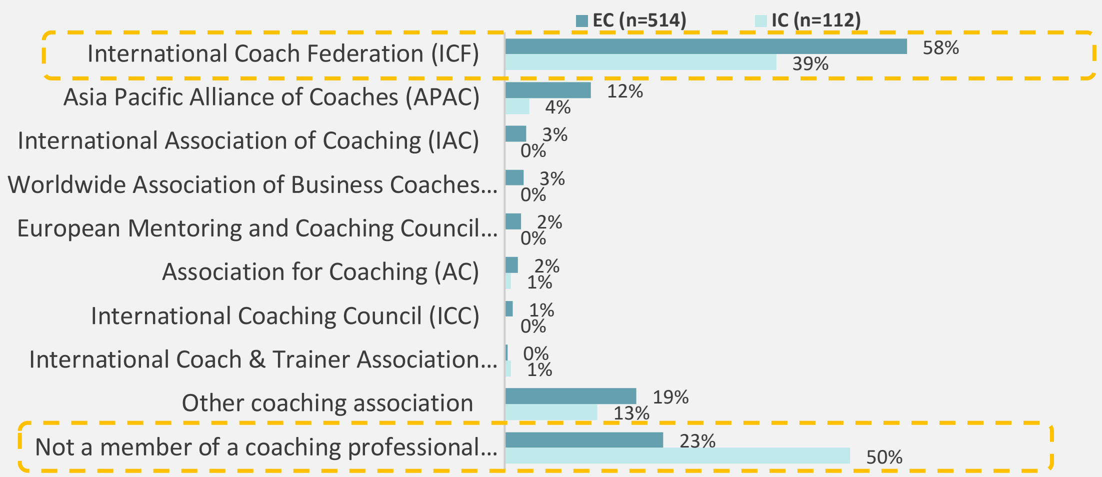
ICF continues to be the leading professional coaching association
APAC is the second largest coaching association

Majority of ECs and 1/3 of ICs are members of ICF. As compared to 2017 survey, there seems to be an upward trend.

50% ICs and 23% ECs are not members of any professional coaching association. When compared to 2017 survey, the trend remains the same for ICs but has gone down for ECs

Overall Survey | CR: Company Representative | EC: External Coach | IC: Internal Coach

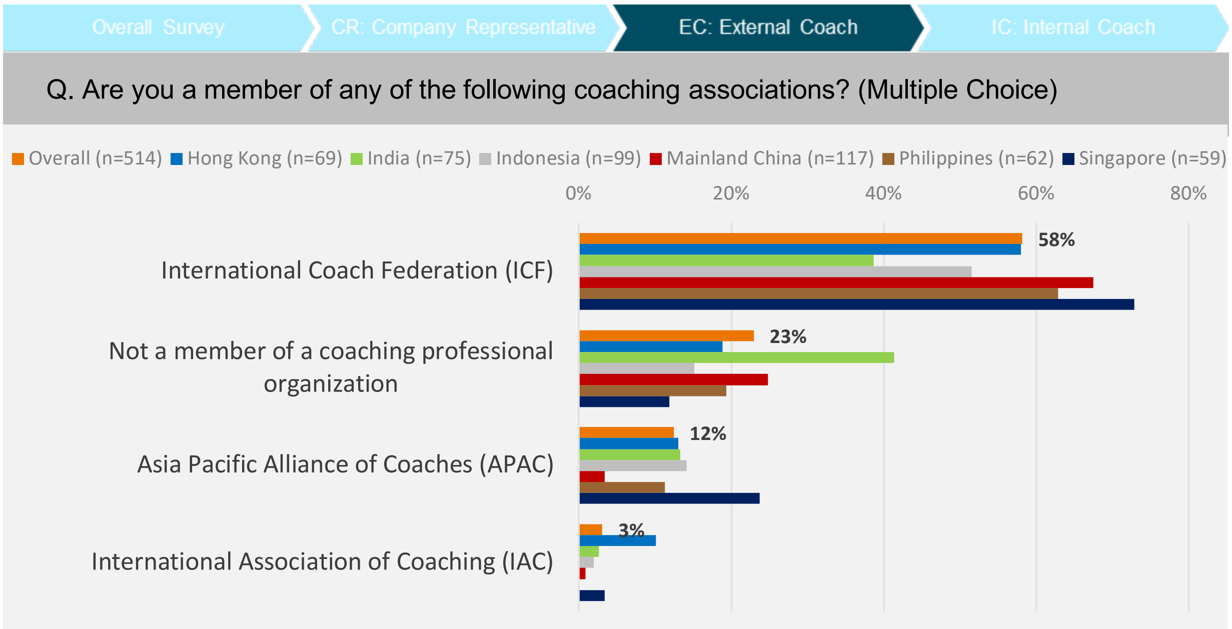
Q. Are you a member of any of the following coaching associations? (Multiple Choice)



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.

5.13 Membership of Coaching Associations – By Markets

ICF is the leading coaching association in all markets.



Something to ponder:

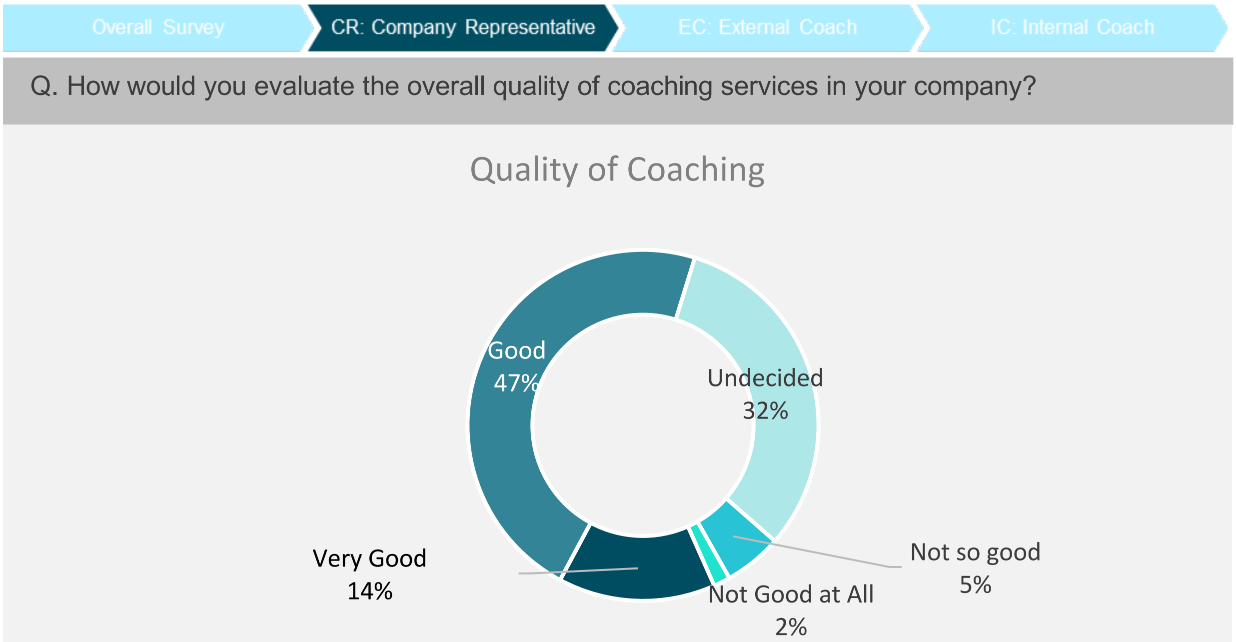
Why are ICs staying away from coaching associations? What will attract them to join professional coaching associations?

6. Coaching Evaluation and Diagnosis

6.1 Evaluation of Coaching Quality

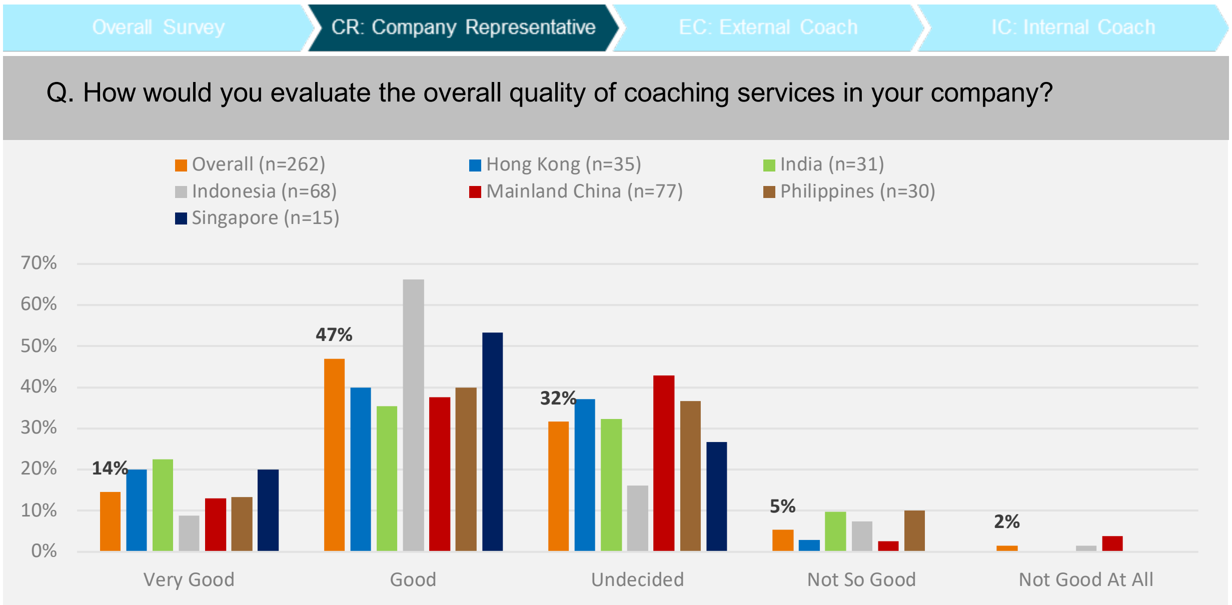
Overall perceived quality of coaching services rated high by majority of companies

Overall perceived quality of coaching services is rated ‘Very good’ and ‘Good’ is 61%, ‘Undecided’ is 32% while ‘Not so good’ and ‘Not very good’ is around 7%.



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:

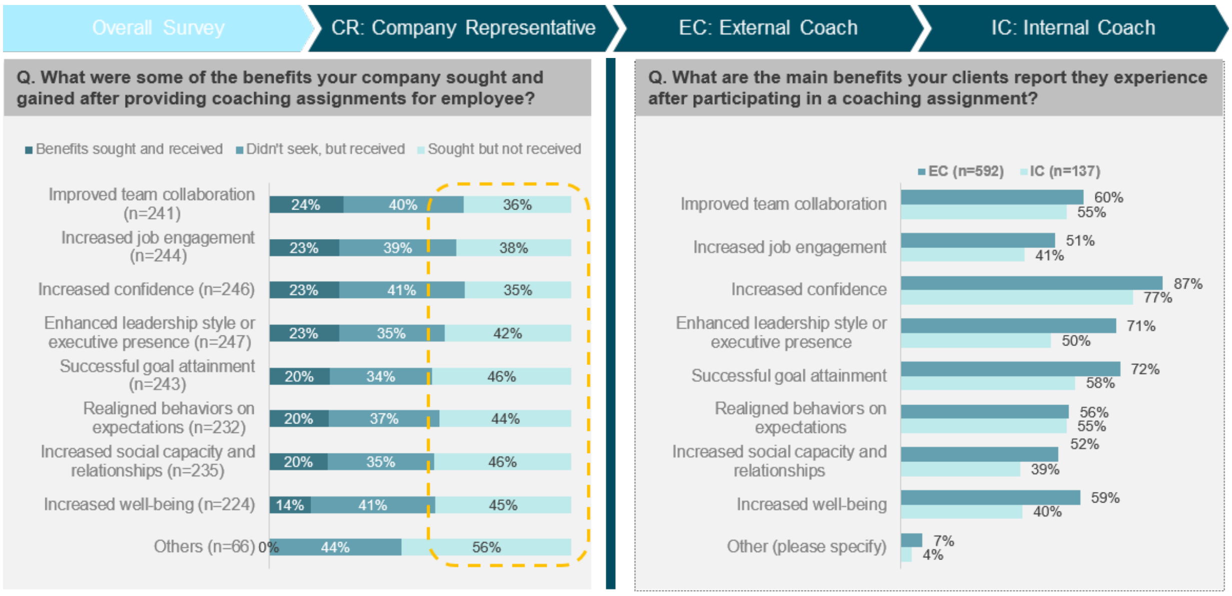
32% 'Undecided' is a relatively big percentage. What could be the reasons for this?

6.2 Coaching Benefits – Expectations vs Delivery

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

On average, about 40% of companies have not received benefits sought. Another 40% received benefits they didn't seek while only roughly 20% actually received the coaching benefits they sought.

Could this be the clue of earlier 32% 'Undecided' ratings companies gave for coaching quality.



Something to ponder:

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

To answer this, we may need to understand the level of clarity on the benefits of coaching for both companies & coaches, adequacy of articulation and communication of coaching benefits during contracting as well as throughout the coaching process.

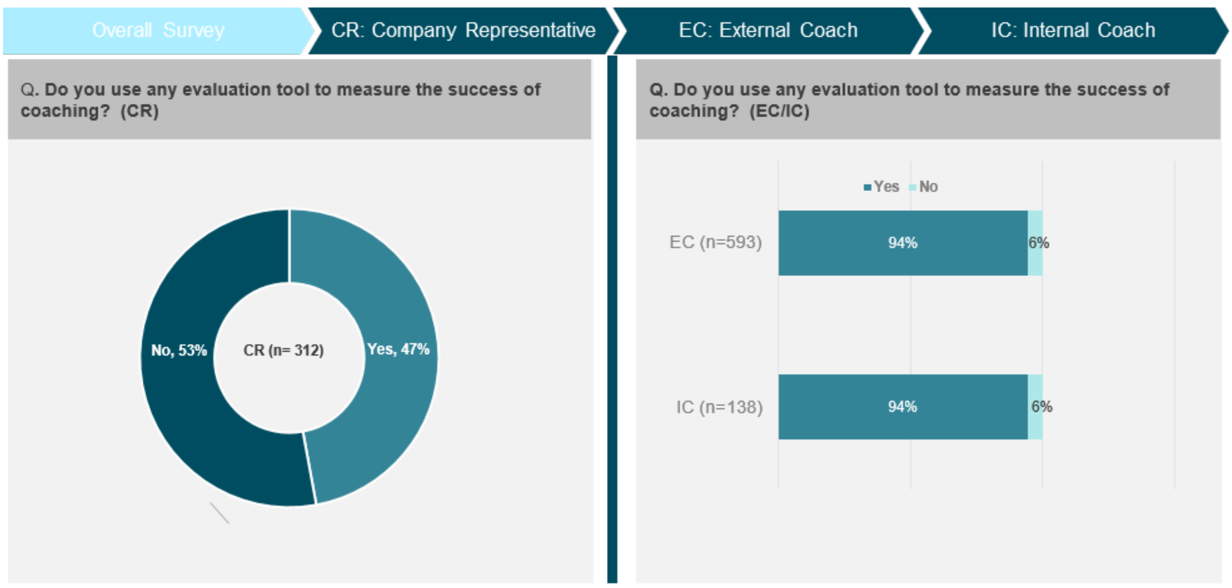
6.3 Usage of Evaluation Tools To Measure Success of Coaching

Marked difference in the level of usage of evaluation tools by Companies vs Coaches.

Only 47% of the Companies use evaluation tools to measure the success of coaching while 53% 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. This could explain why companies may see a lesser need to conduct evaluation directly.



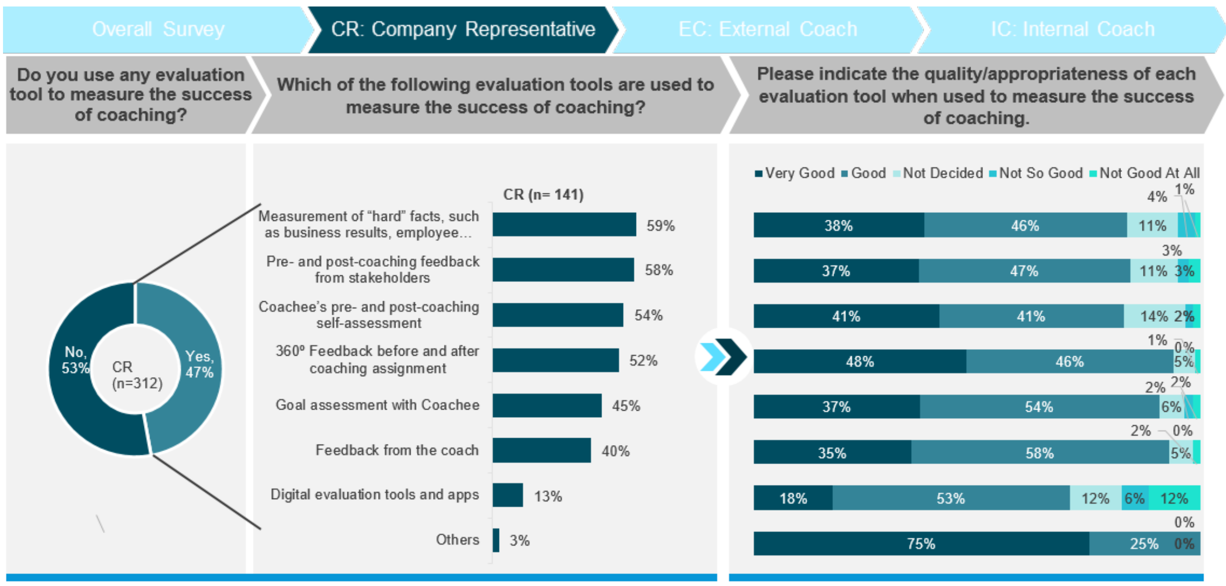
6.4 Measurement of Coaching Success

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.

Of the 47% companies that use evaluation tools, more than half measure 'hard' facts such as business results, employee engagement etc. while another half use pre and post coaching feedback, either from stakeholders or the coachee himself/herself.

Only 13% indicated that they use digital evaluation tool and Apps.

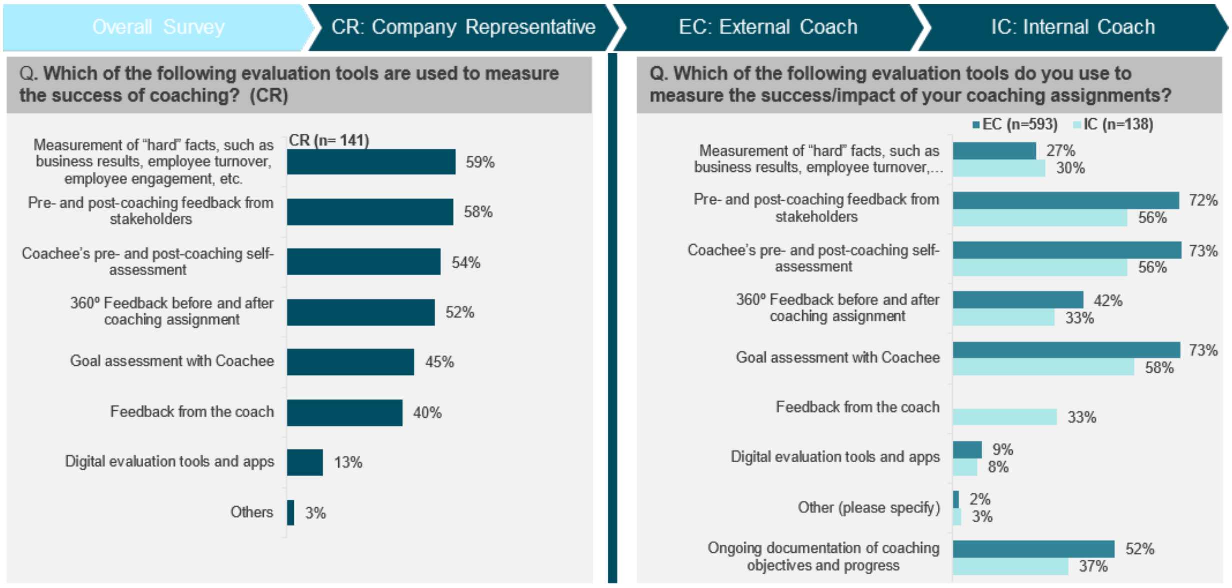
Overall, companies are happy with the quality and appropriateness of the tools.



In the case of Coaches, interestingly, the results differ from companies. Only about 30% indicated that they measure 'hard' facts while more than 70% ECs and 50% ICs indicated that they measure 'soft' facts like pre and post coaching feedback and goal assessment with coachees.

About 50% ECs and 40% ICs indicated that they document coaching objectives and progress on an on-going basis

Only around 2% coaches use digital evaluation tools and Apps.



Something to Ponder:

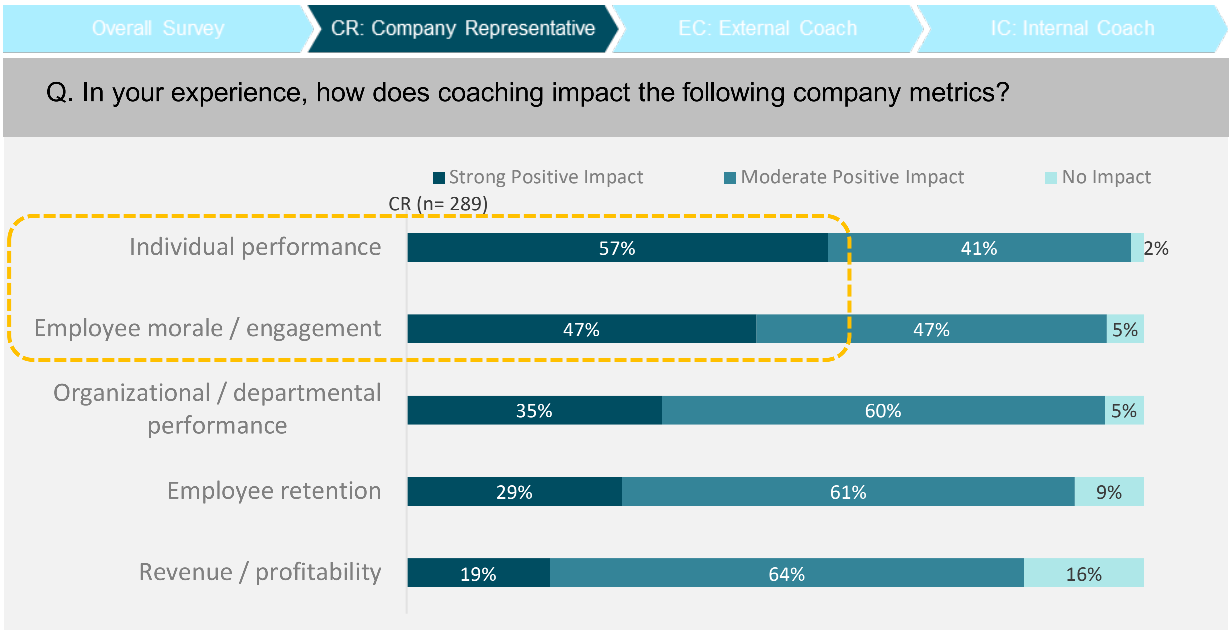
What do coaches need to focus on measuring to make coaching benefits more known to companies? How do we link what we measure to business results or 'hard' facts, to make it meaningful and relevant to Companies?

6.5 Coaching Impact

84% of the Companies see some impact of coaching on their business bottom line.

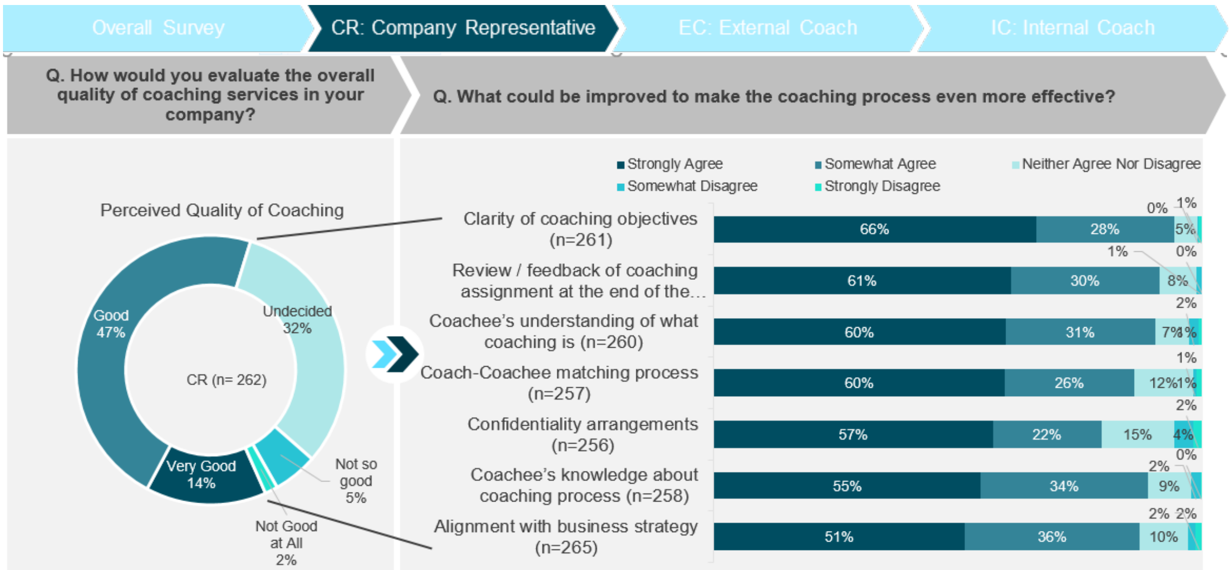
According to Companies, coaching seems to have a strong positive impact on individual performance and employee morale/engagement. Organizational/departmental performance, employee retention and revenue/profitability received a moderate positive impact.

Only 16% of the companies reported no impact on bottom-line.



Top three areas for increasing effectiveness of the coaching process

Companies ask coaches to pay attention to literally all the factors listed for further improvement. The top three areas for improvement are clarity of coaching objectives (94%), review of feedback at the end of coaching assignment (91%) and coachees' understanding of what coaching is (91%).



Something to ponder:

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

7. Coaches Professional Development

7.1 Professional Development of coaches - Practices and Time spent

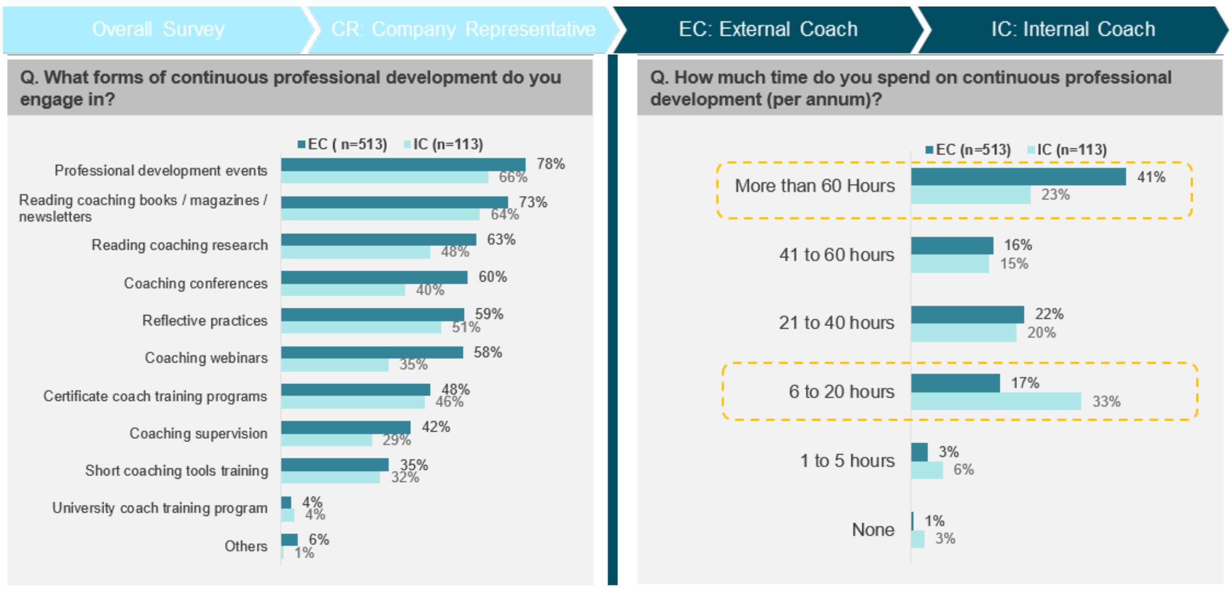
Nearly double the number of ECs (41%) than ICs (23%) spend 60 hours or more per annum on continuous professional development.

Most number of ICs (33%) say they spend 6 to 20 hours per annum on professional development

Attending professional development events, reading coaching books, magazines, coaching research and attending coaching conferences are some of the top rated professional development activities.

Refelective Practice is being used by a majority of coaches - ECs (59%) and ICs (51%) for professional development

Coaching supervision, although a new area, 42% ECs and 29% ICs are already engaging in it.

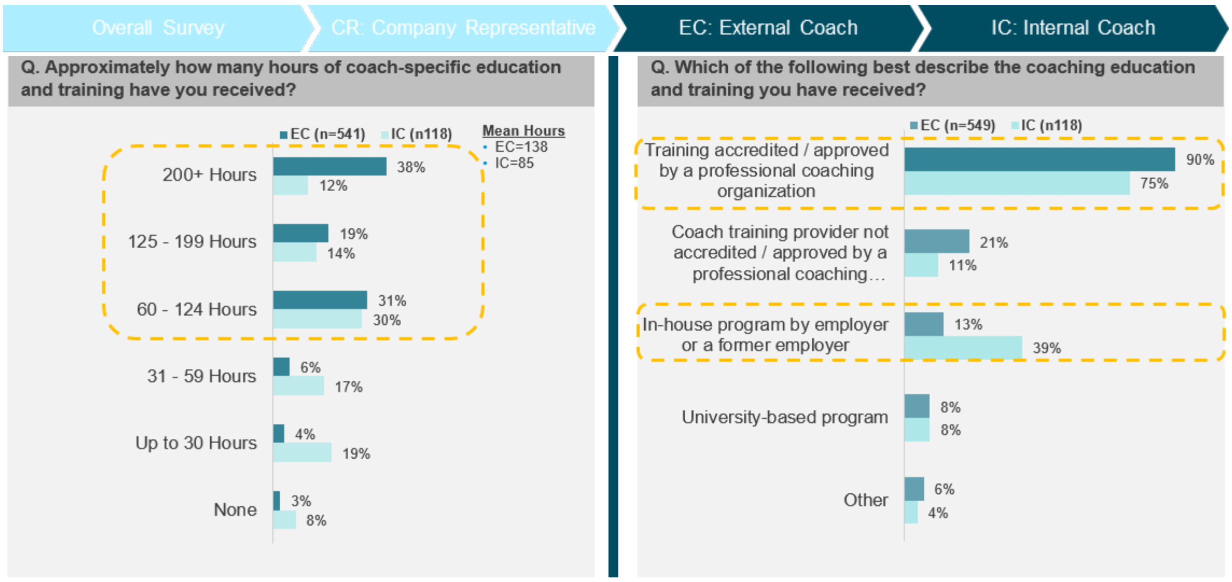


7.2 Coaches' Training and Education

On an average ECs receive 138 hours of coach specific education and training while ICs receive 85 hours

Majority of coaches (90% ECs and 75% ICs) say they have received training from accredited or approved professional coaching organization.

39% ICs say they received the coach-specific training as part of in-house program by employer



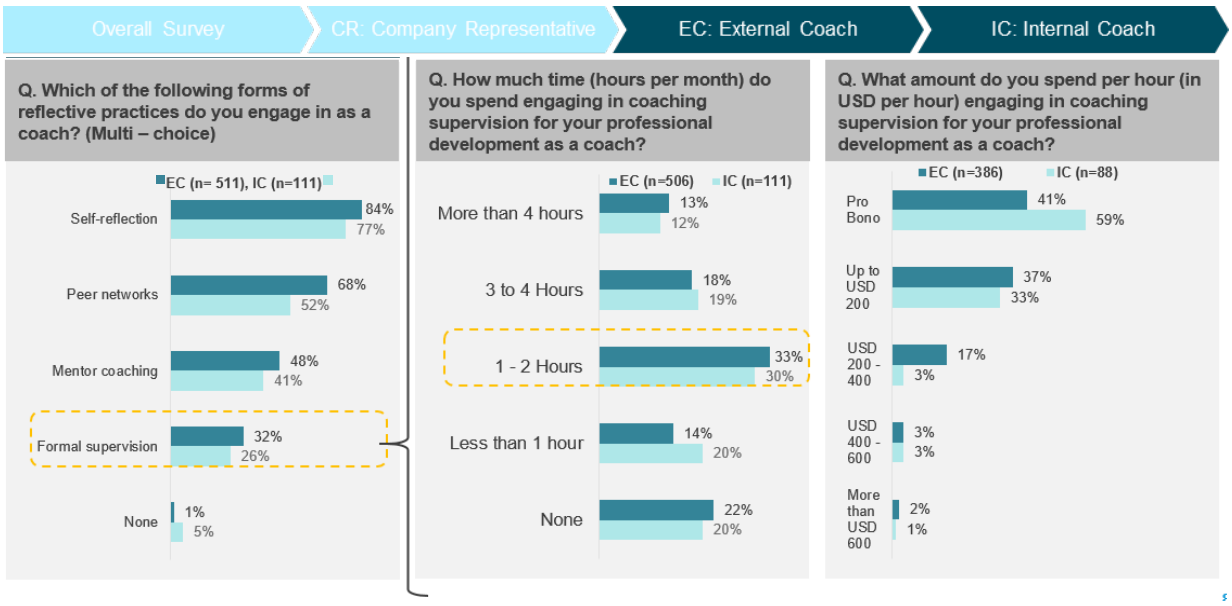
7.3 Reflective Practices/Coaching Supervision

Self-reflection is the most commonly used Reflective Practice

84% ECs and 77% ICs say they use self-reflection, peer networks (68% and 52%) and mentor coaching (48% and 41%) are also used

Formal coaching supervision although very new**,** is also being used by coaches (32% ECs and 26% ICs)

Highest number of ECs and ICs say they spend 1-2 hours/month on coaching supervision. While most Coaches (41% ECs and 59% ICs) say they get supervision pro-bono, one third say they may be paying up to USD 200/ hour.



Something to ponder:

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

8. Outlook

8.1 Companies Perspective on Future Outlook

Companies going all out to build internal coaching capability

Companies plan to increase overall focus on coaching; they want to build inhouse capability (60%), use technology 31%, and increase the coaching budget (39%).

While 27% companies say they want to increase using external coaches, 80% say that they also want to train their leaders to coach team members and to build a coaching culture in the company (73%).

Ambiguity about the future:

An interesting and intriguing observation is that number of people who have chosen 'neither agree nor disagree' are significantly higher when it comes to the future trends, specifically to mention the following:

Will increase use of internal coaches – 35%

Will use coaching more as remedial action – 32%

Increase coaching budget – 49%

Using technology or AI based tools – 47% (only 31% agree & 22% disagree)

Will increase use of external coaches – 57% (27% agree & 16% disagree)

This means one third of people are not sure about increasing the use of internal coaches. Nearly half the respondents are not sure about increasing the coaching budgets or the use of external coaches. Similar ambiguity exists about the use of AI and technology based tools.

Something to ponder:

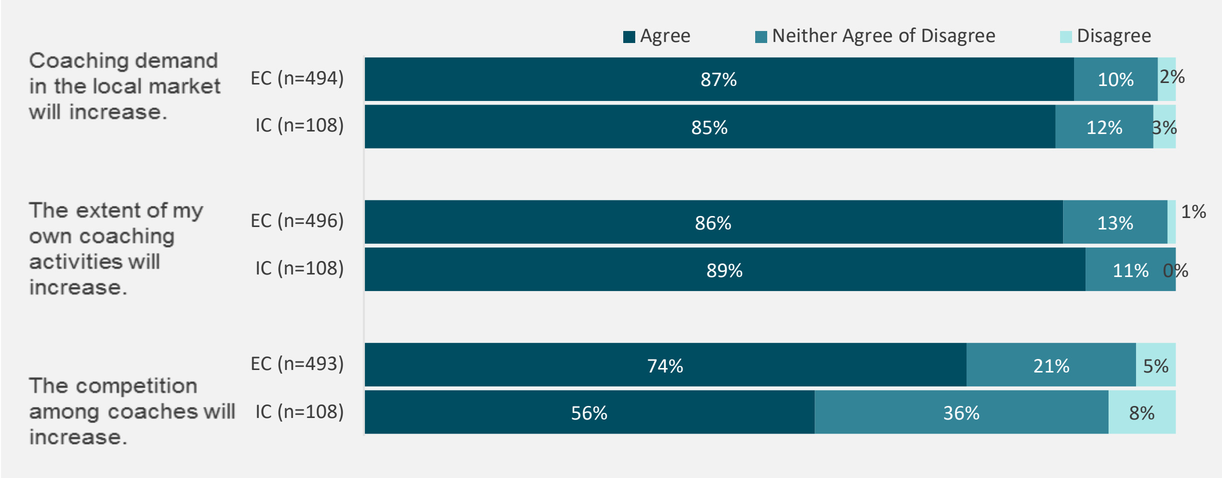
While companies want to create internal capability for coaching, how could they use coaching intervention strategically to create a competitive advantage for their business? How can they capitalize on available external expertise to build on the internal resources? How can coaches play a role in creating future readiness for themselves and the clients.

8.2 Coaches Perspective on Future Outlook

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

Overall Survey | CR: Company Representative | **EC: External Coach** | **IC: Internal Coach**

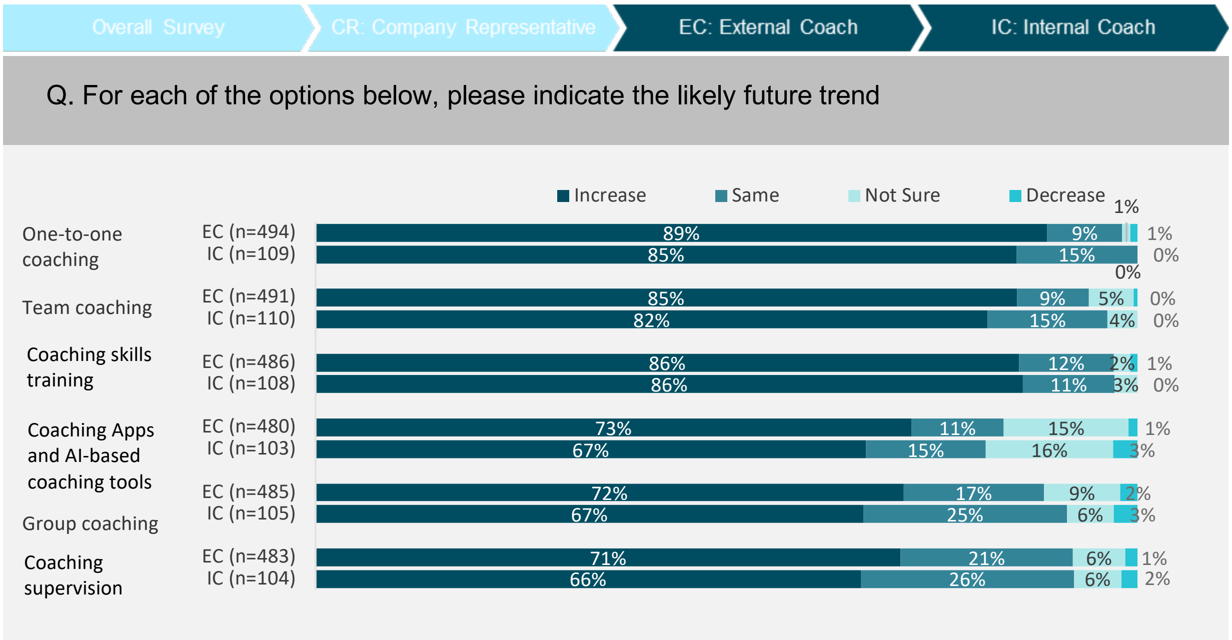
Q. Please give us your outlook about future developments in coaching within the next two years



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

One-to-one (EC 89%, IC 85%) and team coaching is (EC 85%, IC 82%) indicated to increase, Coaching Apps and AI based tools are also predicted to rise (EC 73%, IC 67%).

Coaching supervision, a relatively new area, is predicted to increase by 71% and 66% by ECs and ICs respectively



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?

9. Closing Remarks

We are happy to present to you the indepth and comprehensive 5th Coaching Survey – an Asia Benchmark Report. Individual geographic market reports (Hong Kong, India, Indonesia, Mainland China, Philippines, Singapore) are available to supplement this report to enable a deeper understanding of the landscape.

We would like to thank you for your support in participating in the survey. A large part of the success of this survey is attributed to the high participation and increased reach across new markets.

The survey and this document would not have been possible without the commitment and hardwork of our team members. We would like to thank our academic advisor Ms. Judie Gannon, Oxford Brookes University.

The sixth coaching Survey will include more markets in Asia Pacific. Our aim is to reach all markets in Asia Pacific. Please reach out if you would like to be a part of the next survey as a participant, researcher or sponsor.

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 us:*

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Highlights from the 10th Anniversary Gala
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Coach link 教练客
Love Believe: Coaching in life education
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1623 participants joining 54 events from 2015 to 2018
Geographical Coverage
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