

Overview of the Global Survey of ITF Taekwon-Do Instructors and Schools

May 2021

Prepared for the ITF Business & Marketing Committee by Dr. Olga Shurchkov, V Dan, with the invaluable research support from Staff Members Bo Sabum Shamar Morgan and Bo Sabum Ana Maria Paz Silva and translation work by Sabum Bolun Dai and Sabum Florencia Manifesto



Project Team

Research Support



The Staff 

Help all instructors with better and more accessible tools for the development of Taekwon-Do as an economically sustainable way of life.

DO SABUM ANA MARÍA PAZ SILVA
(LEGAL SUPPORT)
CHILE



  U.S.A

Using survey methods and data analytics, we aim to provide targeted business strategies to school owners, with the goal of growing ITF Taekwon-Do worldwide.

Dr. Olga Shurchikov
Member of Committee

Principle Investigator

Research Support



The Staff 

Our instructors are the foundation of the ITF and as such we want to help reinforce these foundations with all the best and latest tools, techniques, knowledge and expertise. As a team, we hope to motivate and help you move toward business success.

DO SABUM SHAMAR MORGAN
(DATA ANALYTICS AND STATS)
JAMAICA

Translation



  Argentina

Our aim is to support spreading the wellness of Taekwondo around the world by developing fundraising and sponsorship programs oriented to companies focused on health and welfare.

Sra. Florencia Manfresin
Member of Committee



  China

Business and marketing is not only an essential part of our federation development but also involved in the daily operation of associations and local clubs. Business and marketing committee is here to support all in the operation and profitability.

Shen, Bohun Dai
Member of Committee


**Business
& Marketing
Committee**

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Supplementary material (available upon request)

- **Appendix with the full Survey Instrument**
- **Appendix on Methodology**
- **Appendix with the Detailed Overview of Free Response Data from the Survey**

1. Survey Overview and Timeline

Recent Surveys

Q Search recent surveys



CLOSED	Survey about new ITF initiatives Created: 08/25/2020 Modified: 03/19/2021	488 Responses	44% Completion rate	7 mins Typical time spent	... Options
CLOSED	关于ITF最新活动的调查问卷 Created: 01/10/2021 Modified: 03/14/2021	80 Responses	46% Completion rate	5 mins Typical time spent	... Options
CLOSED	Encuesta sobre nuevas iniciativas de la ITF Created: 01/13/2021 Modified: 02/16/2021	81 Responses	48% Completion rate	13 mins Typical time spent	... Options
CLOSED	Обзор новых инициатив МФТ (ITF) Created: 01/07/2021 Modified: 02/10/2021	60 Responses	48% Completion rate	11 mins Typical time spent	... Options

- ✓ Original survey in English created and revised based on feedback by ITF Board members (Sep-Oct 2020)
- ✓ Survey programmed in Survey Monkey and tested (Oct-Dec 2020)
- ✓ Survey translated into three languages: Chinese, Russian, and Spanish (Jan 2021)
- ✓ Survey launched via email and social media campaigns (Jan-Feb 2021)
- ✓ Survey closed and analysis initiated (Mar 2021)

Survey about new ITF initiatives

Business & Marketing Committee's survey of schools and instructors - Information and Consent

Thank you very much for participating in this survey of the ITF's Business and Marketing Committee.

This survey is designed to gather information from instructors and school owners about their current business operations: What works, and where might the ITF be able to help, especially since COVID-19. We are also seeking your feedback on a number of new initiatives and projects of the Business and Marketing Committee that are meant to provide support to existing members and to grow Taekwon-Do around the world.

Your input will be extremely valuable to us, so please consider taking the time to fill out the survey. It should take no more than 20 minutes of your time.

We value your privacy! Your responses will remain strictly confidential. Your responses will be anonymized and de-identified prior to any analysis, and the results will be presented to ITF leadership or made publicly available only in aggregate form. We will never misuse your private information in any way.

If you complete this survey, you will be entered into a lottery to win a \$100 Amazon gift card, or an alternative of equal value to be arranged with the winner.

Participation is completely voluntary. If at any point you want to withdraw from the survey, you may do so. If you have any questions, please do not hesitate to contact Dr. Olga Shurchkov, member of the ITF Business & Marketing Committee at oshurchkov@itfamerica.org

OK

0 of 35 answered 

Survey Consists of 5 Major Parts

Basic Information

- Location and country information (optional)
- Taekwon-Do rank and status
- School name

School Information (only if indicated school owner status)

- Whether or not TKD is the primary source of income
- What type of venue(s) the school operates from
- How many venue the school operates
- Total number of students pre-COVID
- Number of classes per week and type of classes
- How engaged is the school is competitions
- Student information
- School's focus in TKD (patterns/sparring/etc.)

Effects of COVID-19 on School Operations (only if indicated school owner status)

- How the school responded to the COVID-19 pandemic
- Top reasons for why students stopped training
- Biggest hurdle(s) to conducting virtual TKD classes
- How much revenues/costs decreased due to the pandemic
- Expectations for the future trends in revenues and costs

Interest in ITF Products and Services

- Willingness to pay for certain products
- Ideas for other products that the ITF could distribute directly via the eStore
- Interest in participating in the beta launch of eStore
- Interest in and willingness to pay for special workshops and seminars
- Ideas for seminar and workshop topics

Demographic Information (optional)

- Highest level of education
- Ethnicity
- Gender
- English language proficiency
- Knowledge of other languages
- Optional comment section (anything else?)

**35 questions
(school owners);
17 questions
(non-owners)**

2. Sample Composition

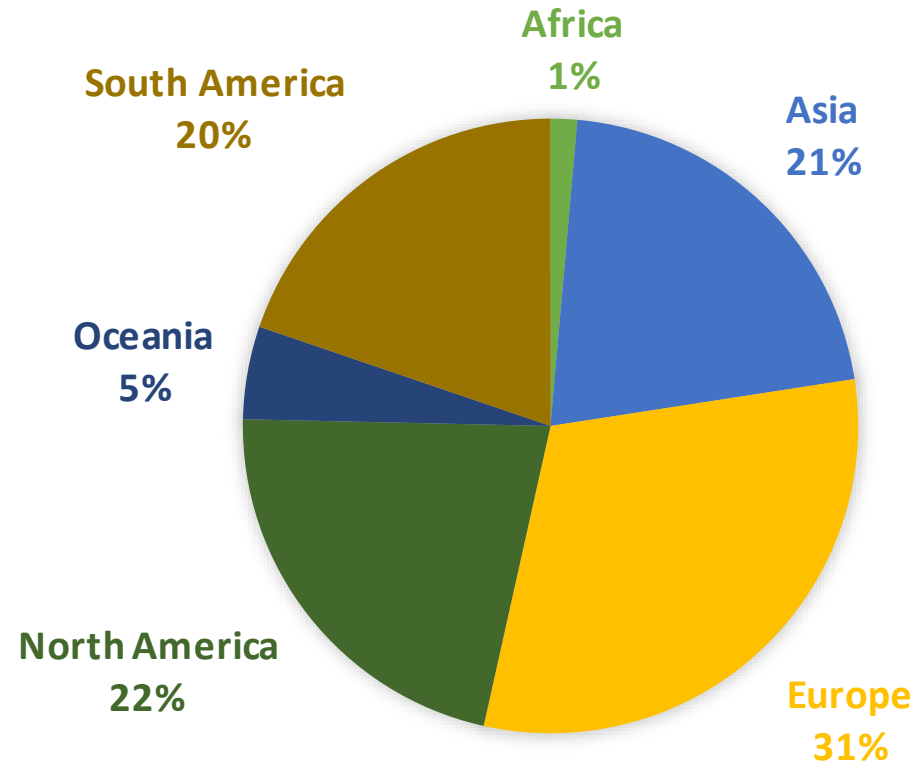
Number of Responses by Country

Country	Number Responses	Country	Number Responses	Country	Number Responses
Anguilla	1	Germany	7	Poland	10
Argentina	45	Grand Cayman	1	Puerto Rico	10
Australia	2	Greece	1	Romania	1
Austria	2	Grenada	1	Russia	36
Barbados	1	Guatemala	3	Scotland	3
Belarus	3	Honduras	4	Senegal	1
Belgium	8	India	14	Singapore	1
Bolivia	2	Ireland	9	Sint Maarten	1
Brazil	6	Israel	1	Spain	2
Bulgaria	1	Italy	3	Suriname	6
Canada	11	Jamaica	7	Sweden	1
Chile	7	Kyrgyzstan	1	Taiwan	2
China	55	Latvia	1	Tanzania	1
Colombia	4	Malaysia	5	Trinidad and Tobago	8
Dem. Rep. of the Congo	1	Nepal	1	USA	31
Denmark	1	Netherlands	7	Uganda	1
Dominican Republic	11	New Zealand	19	Ukraine	2
El Salvador	1	Nicaragua	2	United Kingdom	14
Ethiopia	1	Norway	14	Uruguay	11
Finland	13	Paraguay	1	Vietnam	2
France	3	Peru	4	Zimbabwe	1
Total number of countries:		63			
Total responses		430			

Number of Responses by Region and Continent

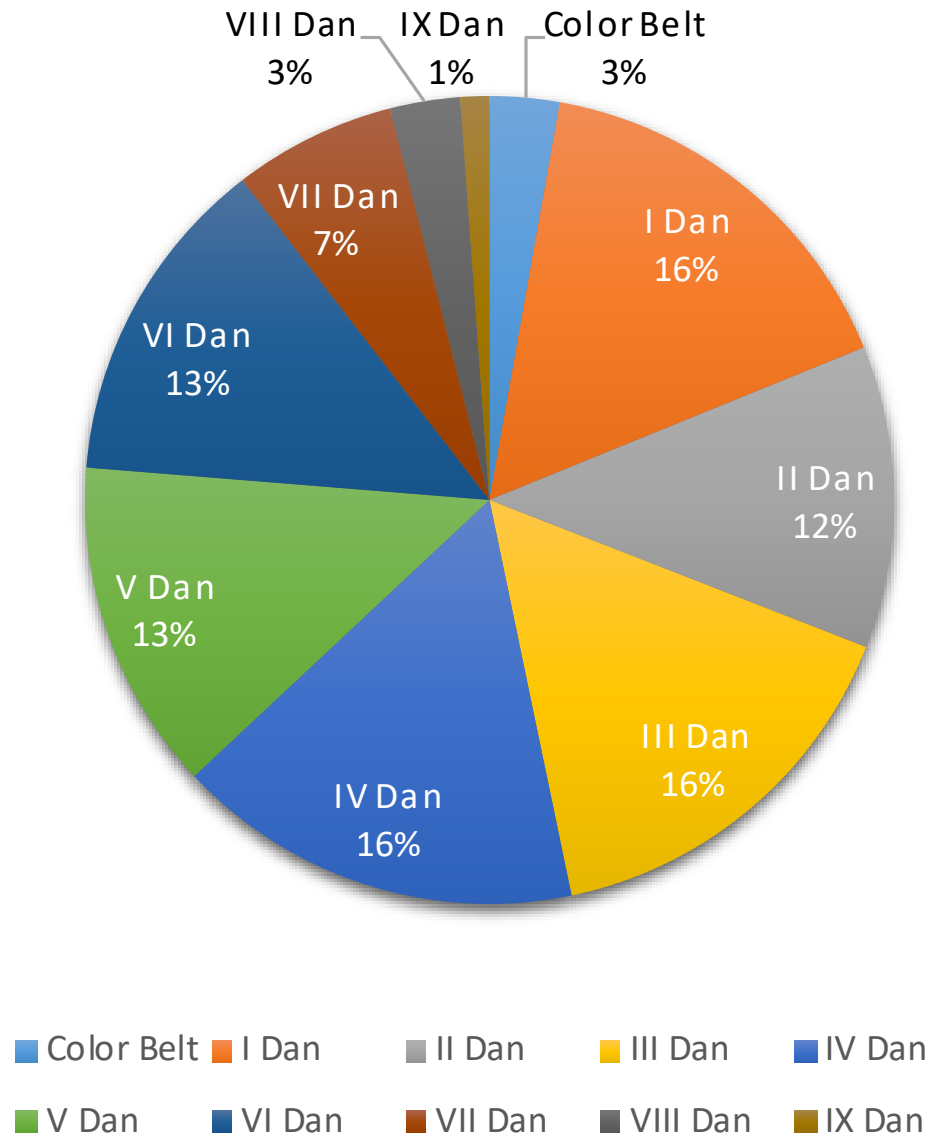
REGION	Number Responses
Asiatic Russia	9
Australia/New Zealand	21
Caribbean	42
Central America	11
Central Asia	1
Eastern Africa	3
Eastern Asia	57
Eastern Europe	17
European Russia	27
Middle Africa	1
Northern America	41
Northern Europe	29
South America	85
Southeastern Asia	9
Southern Africa	1
Southern Asia	14
Southern Europe	6
Western Africa	1
Western Asia	1
Western Europe	54

RESPONSE RATES BY CONTINENT



Distribution of Respondents by Rank and Status

- Busabum (I-III): 44%
 - Sabum (IV-VI): 43%
 - Sahyun (VII-VIII): 9%
 - Sasun (IX): 1%
-
- Percent full- or part-time school owner: 58% (250 responses)



Representation of Women in ITF Taekwon-Do

	Total	All School Owners	All Instructors	All Masters	All 8 & 9 Dan
Female	80	34	33	6	1
Male	307	192	174	35	15
Total	387	226	207	41	16
% Female	21%	15%	16%	15%	6%

- Women represent 21% of the total sample of respondents who indicated gender
- Women are overrepresented among our respondents who hold the rank of Master, relative to the overall gender composition among 7 Dan and higher in the ITF (the actual percent of female Masters is 6% in 2021)

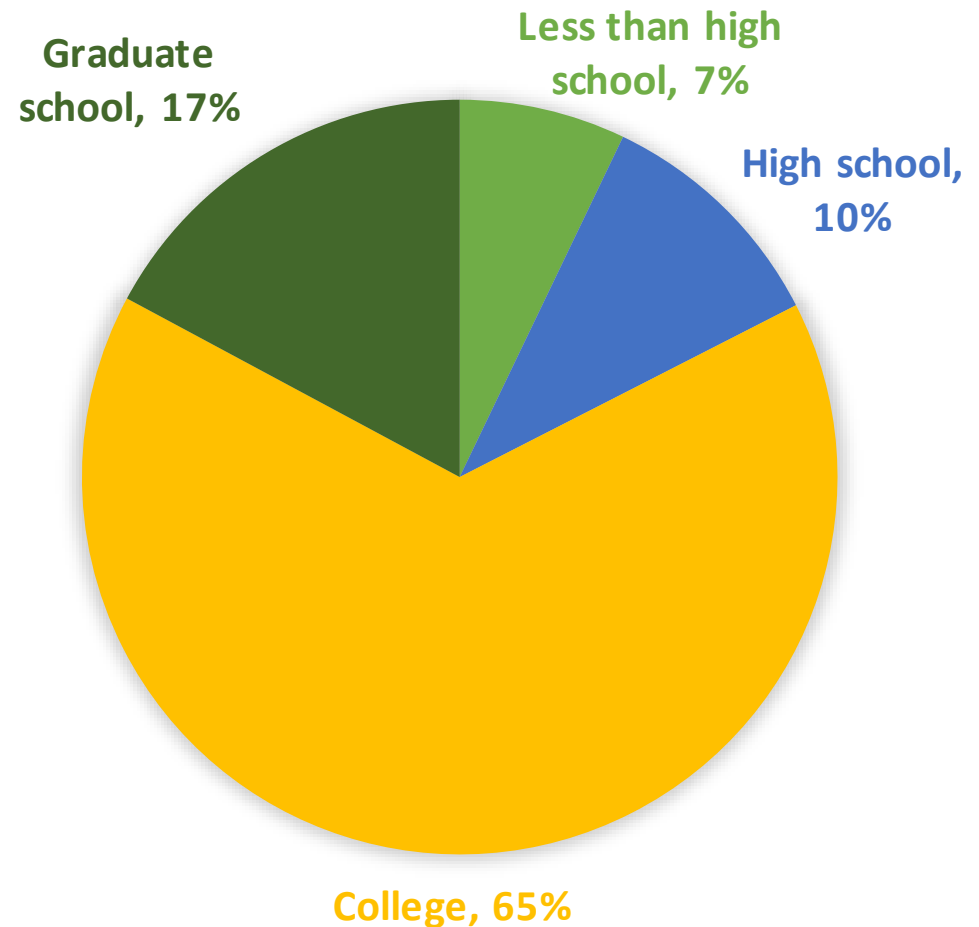
Breaking up the Sample by Educational Attainment

- ITF Taekwon-Do Black Belts are highly educated:

- 82% of respondents indicated having at least some college-level education
- Average years of school in the sample is 15.1 years

- Compare to the global average of 8.5 years and the highest country average of 14.1 years (Germany) in 2017.

Source <https://ourworldindata.org/global-rise-of-education>

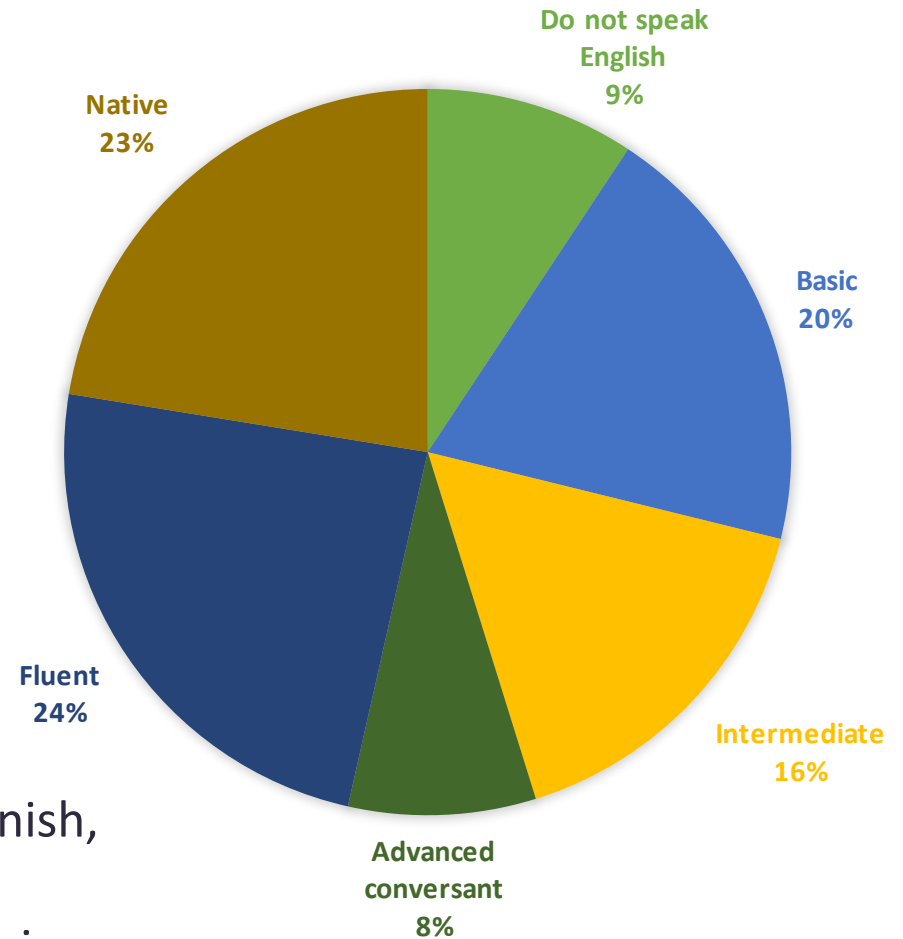


Other than English, Most Common Languages Are:

Spanish	23%
Mandarin Chinese	9%
Russian	8%
French	5%
German	5%
Dutch	4%
Norwegian	3%
Finnish	3%
Hindi	2%

- Other languages include: Arabic, Bengali, Danish, Greek, Hungarian, Indonesian, Irish, Italian, Japanese, Korean, Polish, Portuguese, Romanian, Swahili, Swedish, Ukrainian, Vietnamese, Welsh

English Language Proficiency

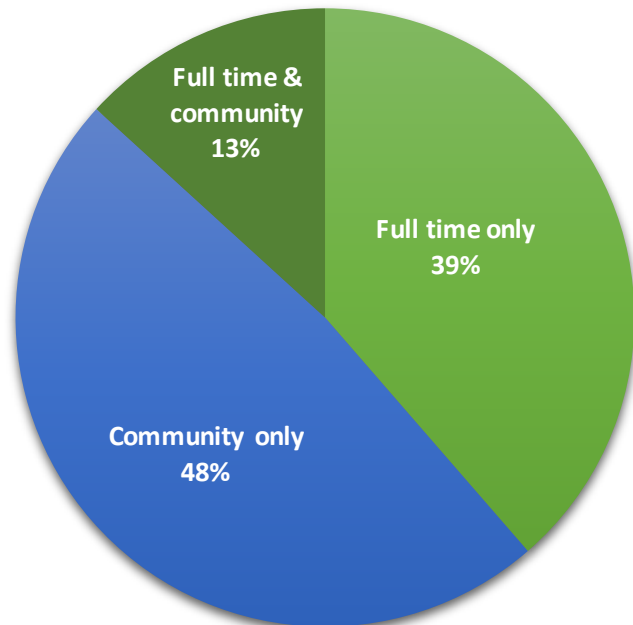


3. How ITF Taekwon-Do School Owners Run Their Business (Pre-COVID)

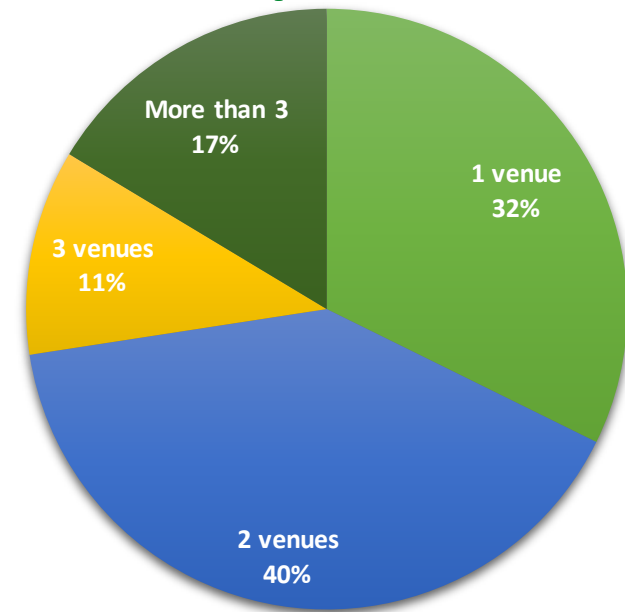
Business Operations

- Out of 196 responding school owners, 51% report TKD as their primary source of income
- Other income includes wage employment, other small business ownership, and portfolio investment

Type of Venue

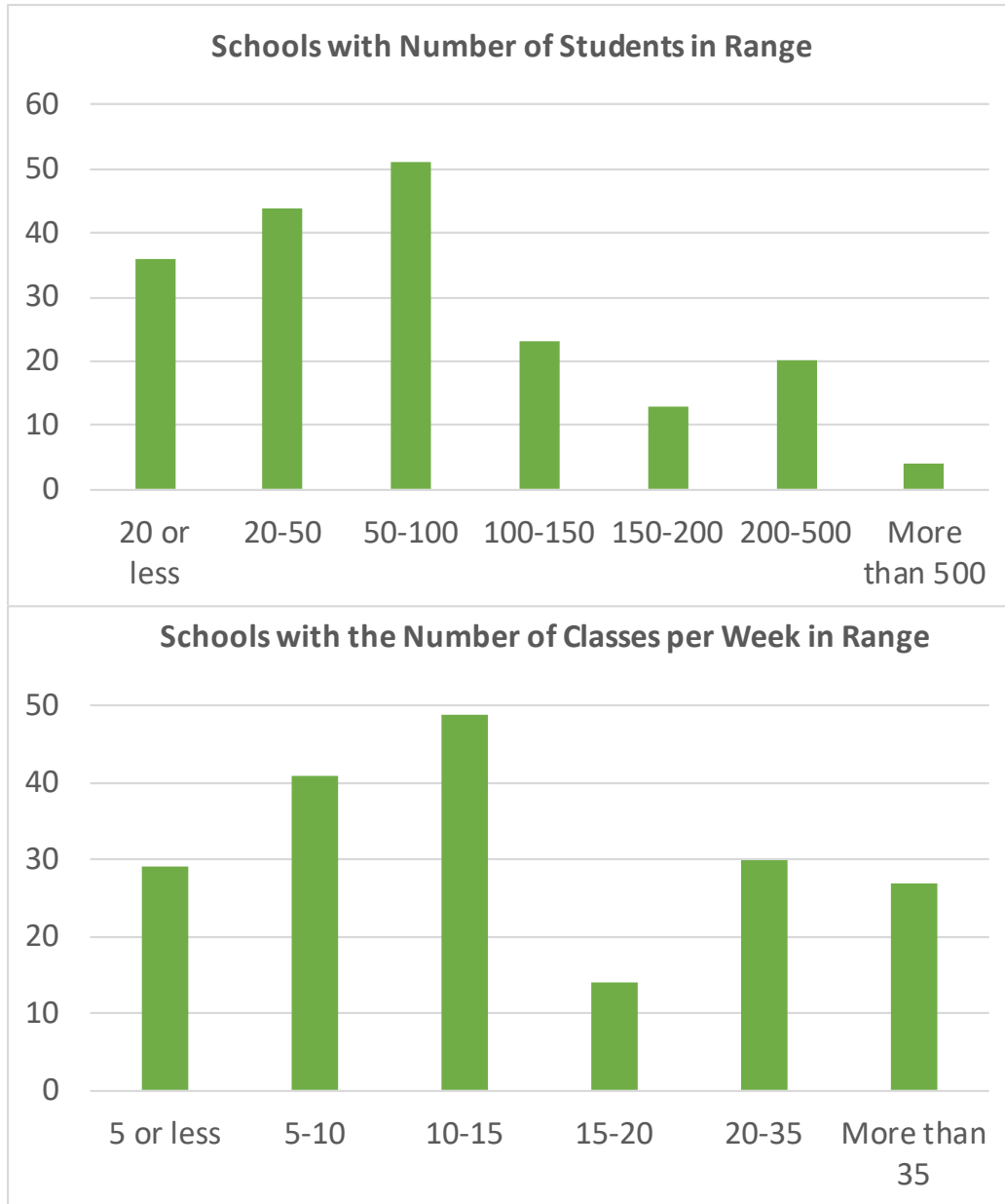


Number of Venues per Club/School



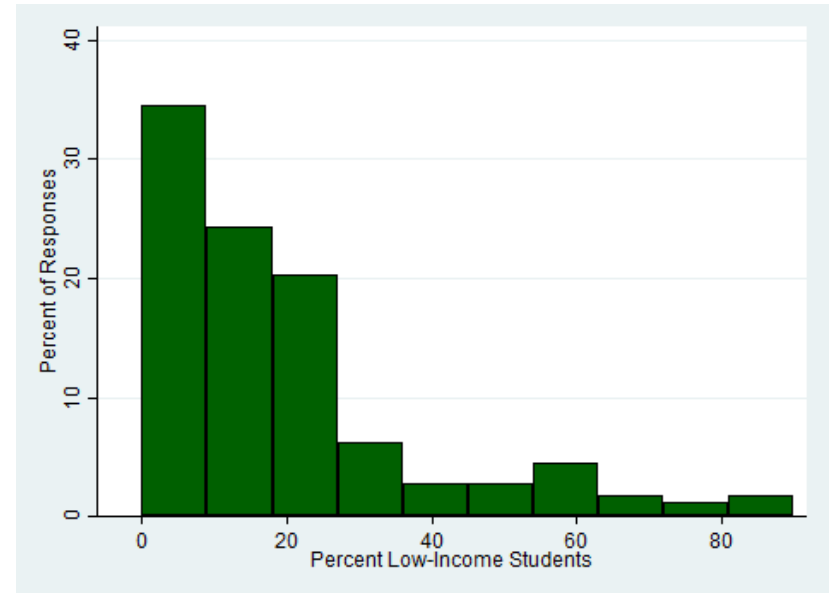
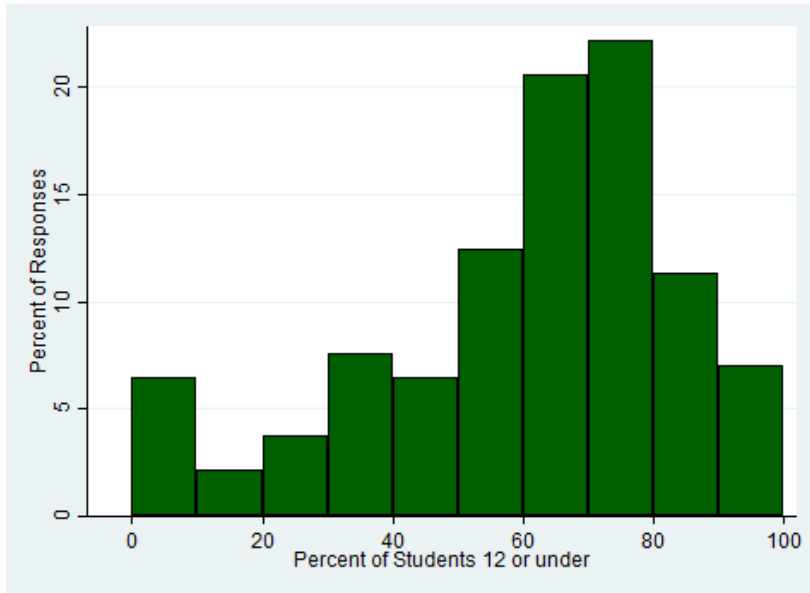
- Community venues include gyms, universities, and recreational facilities (such as the YMCA)
- Owners who use community venues typically rent the space from the owner who sublets it

Students and Classes

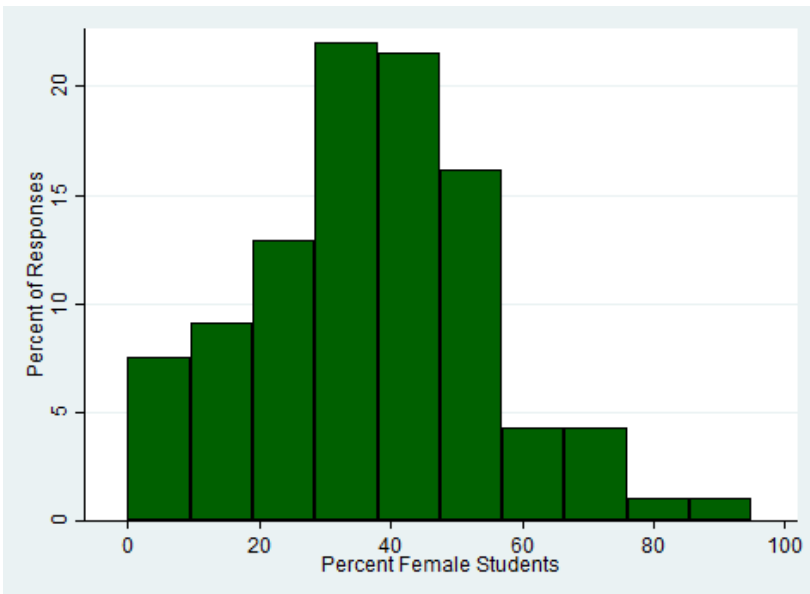


- The average number of students training pre-COVID was 126, but there is significant variance
- The school with the lowest number of students has 2 students; and there are 4 schools with over 1000 students in the sample (2 of these are in Russia, 1 in Argentina, and 1 in Belarus)
- The average number of classes per week is 22, but here too there is significant variation across schools

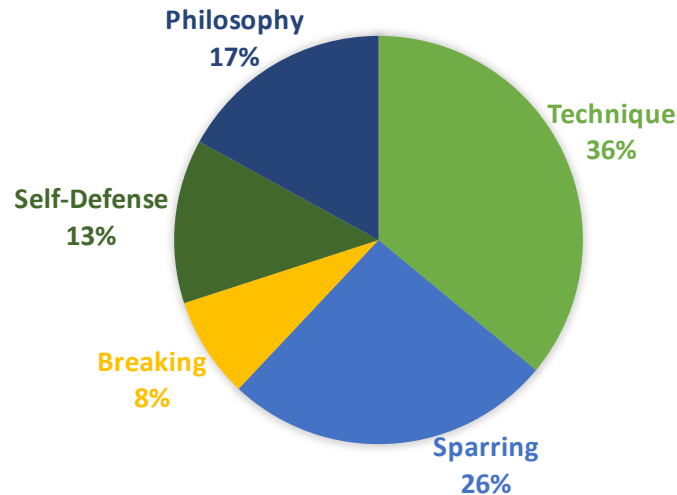
Student Characteristics



On average, 57% of students are children; 36% of students are female; 19% come from low-income of economically disadvantaged backgrounds; and only 5% of students have physical or mental disabilities.



School Focus and Types of Classes



Type of Class	Average Number of Classes in a Typical Week
Beginner/Intermediate class (Kids)	8
Advanced class (Kids)	6
Beginner/Intermediate class (Adults)	4
Advanced class (Adults)	4
Specialty Classes	3
Other Classes	3

- There is a wide range of school focus and emphasis, but most report a mix of all 5 categories.
- The largest number of classes per week are **beginner/intermediate kids classes**. Several clubs reported over 30 such classes per week!
- **Specialty classes include:** sparring; breaking; patterns; self-defence. The majority of schools offer one such class per week.
- **Other classes include:** yoga, boot camp; Zumba; other martial arts. Over 50% of schools do not offer any of these classes. However, ones that do, offer one about once a week or more.

Engagement in Competition

- How often do you and your students participate in these types of tournaments:

Frequency of Participation	ITF			NON-ITF		
	Local	National	International	Local	National	International
Monthly or more	9%	3%	2%	3%	1%	1%
Every other month	13%	15%	0%	3%	0%	0%
Once or twice a year	57%	60%	42%	22%	12%	2%
Less than once a year	15%	15%	30%	17%	16%	14%
Never	6%	7%	26%	55%	71%	83%

- How often does your school help with the organization of ITF tournaments:

Frequency of Contribution	ITF		
	Local	National	International
Monthly or more	7%	5%	2%
Every other month	7%	6%	1%
Once or twice a year	48%	38%	14%
Less than once a year	19%	22%	25%
Never	16%	28%	54%

Factors Associated with School Size

- School size (measured by the number of students) is an important predictor of business outcomes



Schools
with more
students
tend to...

- Be owned/managed by an instructor who went to university or graduate school
- Be located in certain geographic areas (geopolitical factors)
 - The largest schools are in Russia and Eastern Europe
 - By continent, the largest schools are in Asia and Europe
- Have a higher percentage of children as students
- Be the instructor's only source of income
- Be owned/managed by an instructor of higher rank

Owner's gender and English language proficiency and school's engagement in local tournaments do not seem to show a significant correlation with school size

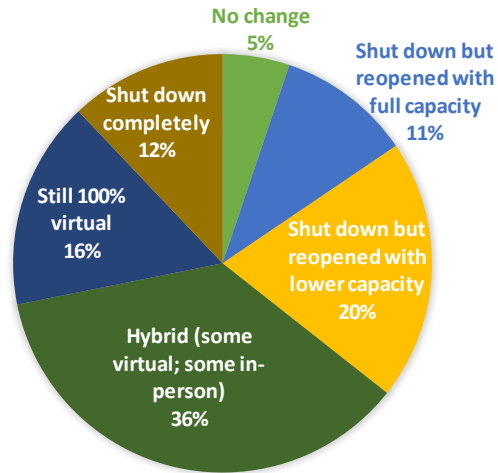


Schools
with fewer
students
tend to...

- Focus more on technique relative to all other aspects of TKD
- Less engaged in international competitions
- Be located in certain geographic areas (geopolitical factors)
 - The smallest schools are in the Caribbean, Central America, and Southern Asia
 - By continent, the smallest schools are in Northern America

4. The Impact of COVID-19 and School Response

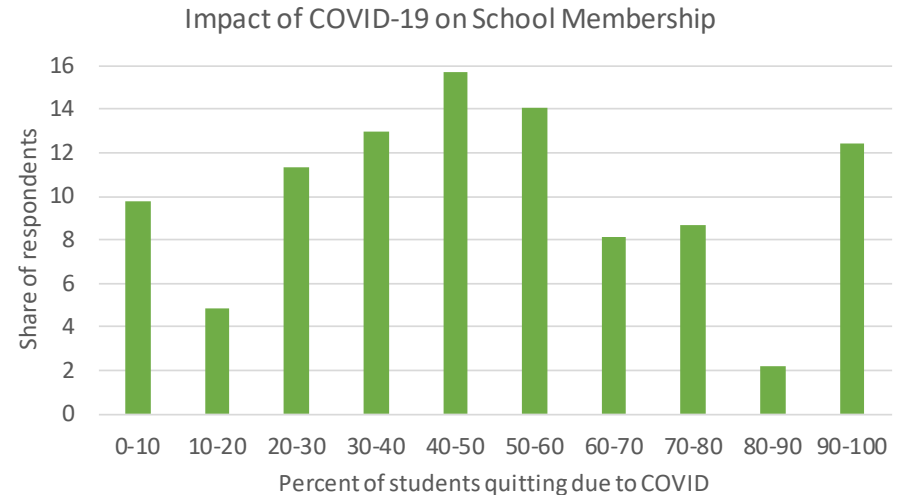
Impact of COVID-19 on School Operations



- The effects of COVID-19 have been extremely varied across respondents
 - About 30% of schools completely shut down or went 100% virtual since the pandemic
 - Only about 5% did not have to change the way they conduct classes

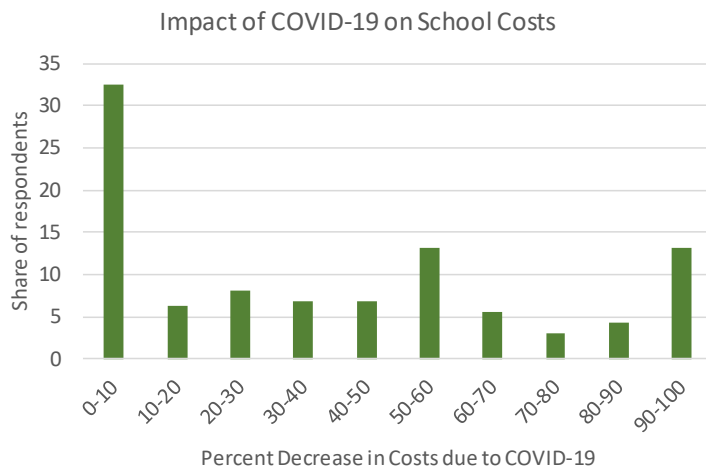
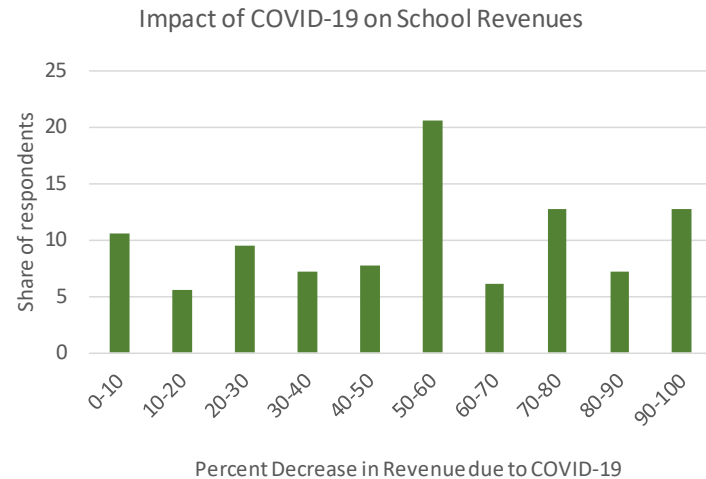
- On average, about 47% of students quit since the pandemic
- Primary hurdles to making virtual classes effective/students quitting (Ranked 1st or 2nd most important)

1. Students dislike Zoom (49%)
2. Low morale among students (43%)
3. Family members dislike virtual classes (29%)
4. Lack of resources (28%)
5. Options for classes on Zoom are limited (27%)



- Lack of educational skills/resources (16%)
- Space constraints (14%)
- Internet access/bandwidth (10%)
- Economic resources (10%)

Impact of COVID-19 on School Profits



- The lockdowns due to the pandemic decreased school revenues, but they also potentially decreased costs (e.g., as schools went virtual, utility bills and rental payments declined)
- However, **decreased revenue exceeds decreased costs**:
 - On average, school owners report a 50% decrease in revenues, but only a 37% decrease in costs.
 - While 25% of owners saw absolutely no decreases in costs post-COVID, only 5% saw no decreases in revenues.
- 50% of respondents see the decreased revenue trend continuing into the future, but only 27% expect that their costs will remain lower

- As a result, schools experienced a substantial reduction in profits (Revenues – Costs)

What Kinds of Schools Experienced Less of an Impact from COVID-19? (“Stress test” analysis)

- A lower likelihood of shutting down or going 100% virtual is correlated with:
 - Location/politics (schools in Asia, Oceania, and South America were less likely to shut down/go completely virtual)
 - Higher percentage of children among students
 - Owner/instructor having college education or higher
- For schools that did not shut down completely, a smaller decrease in revenues due to COVID is highly correlated with a lower share of students quitting, and both are related to:
 - Location/politics (schools in Europe and Oceania saw smaller decreases in revenues than those in Asia, North America, and South America)
 - A larger school to begin with (larger number of students pre-COVID)
 - Owner/instructor having college education or higher
 - Owner/instructor being of higher rank
 - School running from a community venue (or multiple types of venue) rather than from a full-time venue only

5. Gauging Interest in ITF e-Store Products and Services (Seminars and Workshops)

Demand for ITF Products and Services

Overall interest in ITF eStore:

- 84% of 306 respondents expressed interest and enthusiasm
- Estimated high average willingness to pay for a select set of products

Products with highest demand:

- ITF uniforms
- Books and instructional materials (print and digital)
- Gear and other apparel
- Accessories (masks, pins, ties, etc.)

Overall interest in ITF workshops, seminars, and courses:

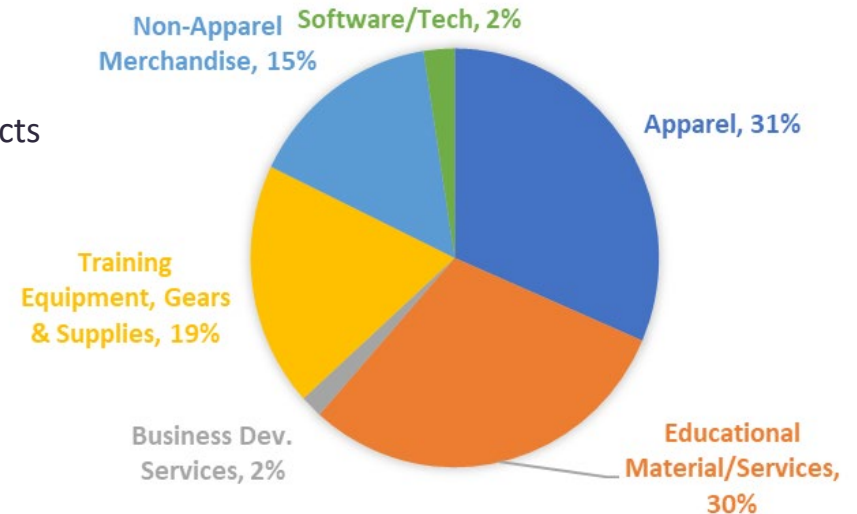
- 56% of respondents indicated that they would be extremely interested
- 45% would be willing to pay tuition

Services with highest demand:

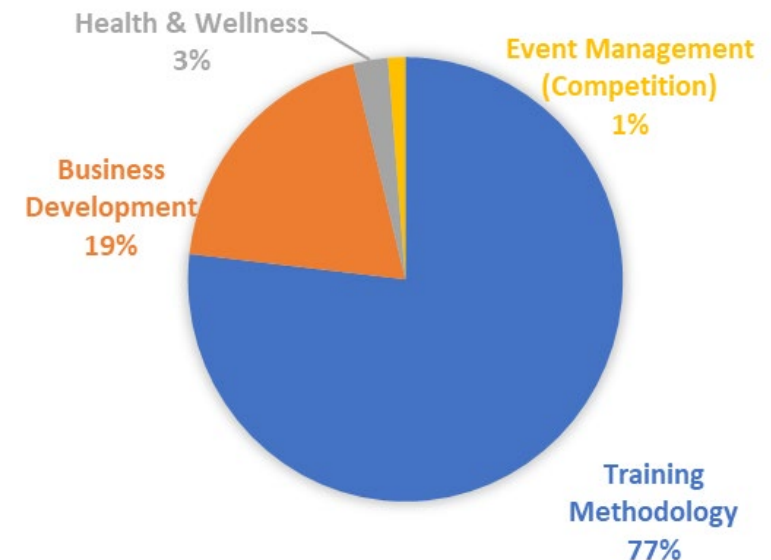
- Training methodology seminars
- Business development training

A few respondents mentioned the following cautions:

- No interest in the ITF offering any products via the eStore
- Skepticism that the eStore would function well
- Conflict of interest with sponsors/suppliers of their teams/Dojangs
- The resale value of items



Free response suggestions for products (160 resp. above) and services (233 resp. below)



6. Feedback and Comments

Summary of Other Feedback

Category	Percent of Responses
Positive feed back	31.6%
Suggestions	48.7%
Constructive Criticism	14.5%
Other	5.2%

- **Positive feedback:** Respondents expressed their appreciation for the opportunity to be heard by the ITF. They also indicated approval of the way the ITF engages with its members.
- **Suggestions:** These respondents suggested aspects to improve or develop that were not taken into consideration in the previous questions.
- **Constructive Feedback:** The themes emerging from a variety of suggestions were...
 - Requests for development of content in Chinese and other languages, making it more user-friendly and accessible, focusing on the idiosyncrasies of those cultures.
 - There is potential interest in access to ITF content by those outside of the organization.
 - A call for increased communication in both directions between the ITF and its members.
 - A concern that the ITF may be moving away from the tenets of Taekwon-Do, toward just being another sport or focusing too much on profits.
- **Other:** These respondents supplemented previous responses or commented on the reality of their schools.

Positive Feedback Quotes

Below are the notable positive comments made by the respondents, representative of the general opinion of the ITF members:

- *“Thank you for taking care of affiliate feedback, it is very important.”*
- *“Congratulations on this new system that you give to each member of the ITF to express themselves, let's keep growing together !!!”*
- *“For me, ITF is still an open book full of possibilities. The full potential yet to cover. It is hard to offer The world organization for such a large range of members. Athletes, students, competitors, instructors, masters, grandmasters, referees, organizers, etc. In the ITF Conventions I have seen something new and very much needed for this. We are The House of Martial Arts, needing to cover all aspects of it - building well behaving, high quality, Warriors with good sense of ethics.”*
- *“Thank you for these surveys. I feel like recently the committed are doing a fantastic job and apply modern and effective methods to gather our input. Looking forward to the effects of this work. Taekwon!”*
- *“This I believe is a great step forward to the vast majority of instructors who receive little to no fit for Purpose help. Compliments & thank you”*

7. Summary

In Summary: What Did We Learn?

- ITF school owners and instructors are a diverse, highly-educated, and passionate group of people
- There is no “one-size-fits-all” model for how ITF schools are operated (great heterogeneity across and within countries in terms of school size, types of classes, and types of students)
- COVID-19 dealt a devastating blow to schools across the world, leading to a 50% reduction in school membership and revenues
- Schools that were able to better withstand the COVID-19 “shock” did so mainly due to the more favourable geo-political factors, as well as insulating factors, such as larger original student base and renting instead of owning space
- The majority of instructors expressed great interest in ITF eStore products and ITF seminars and workshops
- Respondents are very thankful for our efforts to improve economic conditions for school owners and instructors!

*Please contact the Business & Marketing Committee
for any questions regarding this document*

