

2008 School Operations Survey

Introduction

ABMP mailed a confidential survey to 1,647 massage, bodywork, and somatic therapy schools in the United States and received 186 completed surveys, an 11.3% response rate. This version of the School Operations Survey was conducted entirely online – solicitations were e-mailed to 1,200 schools for which ABMP had an e-mail address on file, with a link to the survey. For the remaining 447 schools, including 57 with bad e-mails, a letter was sent which directed them to ABMP's website to take the survey.

The results of the survey were tabulated and analyzed in October 2008. The Educational Services staff at ABMP believes the results of the survey reflect valuable benchmark data that will assist schools in evaluating how they are performing compared to nationwide information.

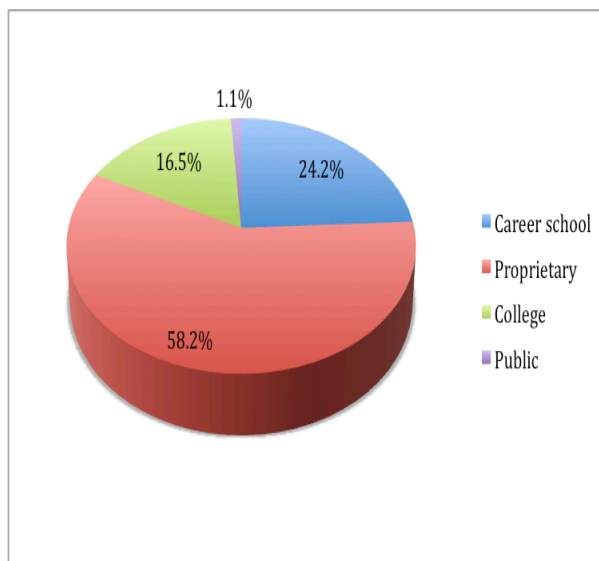
The primary focus of the survey was to quantify information regarding massage, bodywork, and somatic therapy schools in the United States. Results from questions that allowed for more open-ended responses are listed based on the frequency of a topic being mentioned. Most responses were quantified through a calculation of mean or average of responses, along with a median, or midpoint of responses. Where appropriate, we have compared survey results from previous years to those received this year.

General Ownership Data

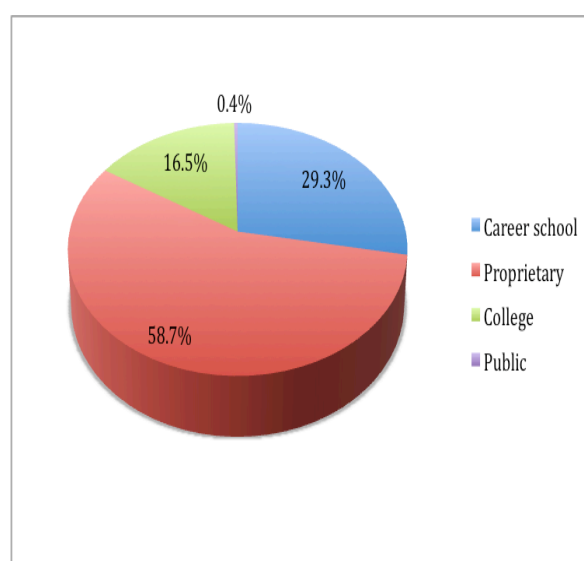
Out of 182 schools, 105 (56.5%) offered programs other than massage compared to 49.6% of the respondents surveyed in 2006. The top 3 programs in terms of enrollment for those offering multiple programs are medical assisting (36 responses – 34.6% of those offering more than just massage), nursing (28 – 26.9%), and esthetician (12 – 11.5%). These findings are similar to those from 2006 with one main difference: the third largest program in 2006 was identified as cosmetology.

One hundred sixteen schools (63.4%) indicated that they rent their facility. Sixty-seven schools (36.6%) own their facilities. These figures are nearly identical to data from 2006. Responding massage schools described themselves as follows:

Responding Massage Schools



All U.S. Massage Schools



The Primary Program

One focus of the survey was to gather information about existing training programs, specifically tuition charges, number of graduates, and length of programs.

Hours

The average primary massage program is 754.2, with a median of 710. This average reflects an increase of 108 hours from the 2006 data where massage programs averaged 646 hours (median of 630).

Primary Program Data

	2006 Average	2006 Median	2008 Average	2008 Median
Program hours	646	630	754.2	710
Tuition	\$6,976	\$6,800	\$8,521	\$7,900
Average per hour	\$10.80	\$10.67	\$11.30	\$11.13
Completion time	9.8 mos.	9 mos.	10.8 mos.	9 mos.
Attrition rate	9.9%	7%	14.1%	10%

Tuition

The average tuition is \$8,52 (compared to \$6,976 in 2006, \$5,919 in 2004, \$5,303 in 2002, \$4,705 in 2000, and \$4,480 in 1998). The hourly cost of schooling has increased 24.5% over the last ten years with an increase of 4.4% in the past two years. This contrasts with the 17.1% increase in tuition reported between 2004 and 2006.

Year	Tuition	Per hour cost
2008	\$8,521	\$11.30
2006	\$6,976	\$10.80
2004	\$5,919	\$8.95
2002	\$5,303	\$8.40
2000	\$4,705	\$8.33
1998	\$4,480	\$8.53

Average completion time for a program is 10.8 months, a one-month increase from two years ago. School attrition rates are back on the rise at 14% after a slight decrease two years ago. In 2004 the average attrition rate was at 11%, while in 2006 it was 9.9%. This year, schools identified their top 10 reasons students do not complete school. Family or personal reasons and financial problems were the most common reasons students gave for leaving school. Results are as follows:

Reason for not completing	Responses
Family/personal issues	97
Financial problems	90
Too difficult/can't make grades	49
Health/medical issues	38
Massage is not for them	37
Moving away	22
Lack commitment	19
Attendance	17
Work issues	15
Daycare	13

A majority of schools (178 – 96.2%) do not offer programs in a second language. Of the seven schools that do, 5 offer it in Spanish, 1 in Russian, and 1 in Japanese.

Financial aid is available to students in 155 of the schools surveyed, representing 83.8% of 185 respondents who answered this query. The financial aid entities most commonly used by massage programs are Sallie Mae (65.5%), Title IV federal financial aid (46.8%), and personal loans (33.8%). Personal loans are down from 41.3% in 2006, while the use of Sallie Mae and Title IV funding has increased. Sallie Mae is up 16.5% in 2006 (49-65%). Title IV federal financial aid is up 6.5% from 40.3% in 2006.

Curriculum

Participants were asked to characterize the focus of their massage program. Out of 181 respondents, the primary choice was core skills (36.5%).

Program focus	Responses	%
Core skills	66	36.5%
Client assessment	60	33.1%
Spa therapies	1	0.6%
Eastern approaches	1	0.6%
Energetic bodywork	5	2.8%
Other	48	26.5%

Of the “other” modalities identified, the top choices were all of the above (25), Swedish (6), relaxation (3), and eclectic combination (3).

Participants were asked to report their curriculum breakdown in primary subject areas. They were also asked to indicate if the subject was required.

	Average hours	Median hours	Required
A&P	132.5	120	100.0%
Pathology	49.8	43	97.7%
Kinesiology	58.4	50	87.0%
Business	33.7	25	95.3%
Ethics	18	12	97.6%
Professionalism	27.1	20	82.7%
Massage Theory and Practice	Practical 192.2 Theory 131.5	200 111	97.5%
First Aid	6.6	6	70.7%
Internship	90.3	81	87.3%
Written Final			83.0%
Practical Final			81.3%

Participants were also asked to indicate the importance of specific areas in their program (1 not important – 5 very important). The results are as follows:

	Responses	Average
Broad array of modalities	184	4.2
Clinical application	180	4.8
Awareness of touch	183	4.8
Skill development	182	4.5
A&P knowledge	181	4.7
Client medical touch history	178	4.3
Interpersonal dynamics	178	4.6

The Institution

The average non-refundable application fee is \$66.80 (median \$50), similar to the average \$69 (median \$75) from 2006. Of the 186 respondents, 170 charge an application fee (91.4%).

The paid full-time equivalent administrative staff is up from 2006, with an average of 12.8 and a median of 3 compared to an average of 9.2 and a median of 3. The typical school has an average of 6 full-time instructors (up from 3.4 in 2006), 8.6 part-time instructors (up from 7.4 in 2006), and 5.1 contractors (down slightly from 5.5 in 2006) who teach the primary program.

The survey documented that half (50.8%) of instructors working at massage schools have 5 or more years of teaching experience. A third (32.2%) of instructors have between 2-5 years of experiences, while the remaining sixth (16.9%) or instructors have less than 2 years of

experience. These numbers are very similar to those documented in the 2006 survey. Of 186 respondents, 128 schools utilize an advisory committee (68.8%). This is similar to survey results from 2006.

80.1% of schools offer placement services, down slightly from 83.8% in 2006. Of programs offering these services, 60.0% characterize their services as “formal”, or more than just a bulletin board at the school. Of those that actively work to place their students, they report an average placement rate of 84.1% (median of 85%), up slightly from 2006 (average 82.7%).

About three-fourths (77.7%) of schools accept transfer credits; however 21 schools will only accept transfer credits from an accredited school. Programs at 28 schools may accept transfer credits upon approval (up from 16 in 2006) and 11 schools have state restrictions.

More than half of the schools responding (55.7%) report housing a professional clinic onsite, similar to 56% in 2006. The number of schools that include student clinics (90.8%) continues to rise (85.7% in 2006, and 81% in 2004). The average rate for a one-hour massage remains practically the same at \$25.41 (median \$25). The average number of clinic hours required by schools is 99.6 (median 90), up from 89 hours (median 65) required in 2006.

The number of schools providing insurance for their students remains the same at 61.2%, while 31.1% require students to obtain insurance on their own while attending school. Over fifty-two percent (52.3%) include the cost of insurance in the tuition. This is up from 46% in 2006.

Marketing

Consistently over the past six years, schools have indicated the two most successful avenues for marking their schools are word of mouth and Web sites. Pay-per-Click jumped to the third spot beating out the yellow pages from 2006 and television from 2004. Schools with websites have increased slightly from 94% in 2006 to 95.1% in 2008.

	Very effective	Moderately effective	Not effective	Not applicable
Pay-per-Click	17.0%	24.2%	9.7%	49.1%
Paid Web listings	27.5%	31.9%	5.0%	35.6%
Word of mouth	81.0%	19.0%	0.0%	0.0%
Trade magazine	2.4%	28.5%	17.0%	52.1%
Direct mail	11.0%	38.7%	16.0%	34.4%
Yellow pages	14.3%	41.6%	23.0%	21.1%
Newspaper	13.9%	35.8%	23.6%	26.7%
Radio	7.9%	23.2%	22.6%	46.3%
Television	16.4%	13.9%	9.1%	60.6%

Instructors

Growth and Development

The number of schools offering in-service training for staff and faculty continues to increase. The growth over the last 6 years from 2002 (60%), to 2004 (67%), to 2006 (78%), to 2008 (81.9%) demonstrates a 21.9% increase.

Tuition reimbursement for instructors attending seminars related to the field of bodywork, teaching techniques, or general education rose slightly from 54% in 2006 to 56.9% in 2008. The average ratio of students to instructors was reported as 11.3 to 1 (mean 10 to 1).

One third of schools (33.5%) responding to the survey pay instructors an average of 4.3 hours per week of preparation time. Most schools do not provide this benefit to instructors. Formalized benefit plans for employees at the school have increased from 47.9% in 2006 to 55.5% in 2008. 150 of 177 (84.7%) respondents provide annual written performance evaluations to instructors. This is similar to 86% reported in 2006.

Compensation

We asked each school to give us a range of pay for each primary subject area. Schools provided low and high amounts for each category.

	A&P Instructor	MT Instructor	Business Education	Administrative Staff
Average Pay	\$22.64-32.74	\$21.97-32.35	\$22.76-32.88	\$13.23-23.03
Median Pay	\$20.00-30.00	\$20.00-30.00	\$20.00-30.00	\$11.00-20.00
Employee	61.9%	64.7%	64.5%	85.7%
Independent Contractor	38.1%	35.3%	35.5%	15.3%