

## Conclusions

### Several items stand out when reviewing the data:

- The attrition in the number of programs hit each school category—each of the five program categories declined from 2011 totals.
- The average number of graduates per school is half the total of 14 years ago.
- A formerly held opinion was that accreditation was a lifeline to smaller programs, and that future viability could be contingent upon offering Title IV financial aid. Interestingly, more career training institutions (all Title IV-eligible) ceased offering massage therapy programs (37, or 9% of the 2011 total) than proprietary schools (30, 4%). The actions of the US Department of Education to reel in reckless behavior among “for-profit” educators undoubtedly is having an effect on all participants in Title IV-granting vocational education institutions, regardless of their past behaviors toward students. In other words, the “belt-tightening” has, and will, continue to affect all aid-eligible schools.

One reading the 2013 edition of this report might be inclined to dread the 2015 edition. But will this contraction trend continue? Are the 2013 results just the most recent stop on a continuing downward escalator?

In our 2011 report, we asked, “How many students and graduates overall would be healthy for the massage profession? Did the boom years leave a glut of educated massage therapists who have been unable to sustain an economically viable career—meaning a continued decline

in the number of graduates will help the market stabilize and help those remaining find sustainable work?”

We then added, “Eventually, as Adam Smith preached, the marketplace will find its equilibrium—demand and supply will match.”

Our prediction—which is a semi-educated guess based on our efforts in the massage education arena for the past 16 years, including conducting this census biennially—is that the decline will continue. We’re not yet at the bottom.

Massage is a viable career for the right individuals, and during the past decade the mushrooming growth of training options, combined with increased ease of federally funded tuition assistance, has created a bubble of students that was unsustainable. The field is returning to a more normalized number of graduates—and may not yet be at that “normal” number. Given the activity within the education community as well, we believe that the attrition affecting the number of schools has lagged the enrollment number, and we would not be surprised to see 2015 results showing 30,000–35,000 graduates coming from 1,100 schools.

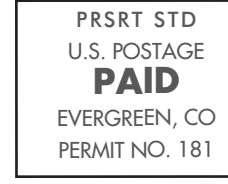
If that is the prediction, how will we get there? Continued attrition, school by school? An unbiased observer—such as an analyst—might look at this data and realize, “this field needs consolidation.” In 1998, fewer than half the number of schools produced more graduates than in 2012. The hundreds of small schools with minimal student populations have less cushion than ever to withstand the bumps of competition and a sluggish US economy. Perhaps if more of these schools joined forces, a more robust training environment would emerge.

Our continuing professional challenge is to keep educating the public about the value of a life that includes massage therapy, attract and keep more customers (students and clients), and keep that equilibrium point as high as possible.

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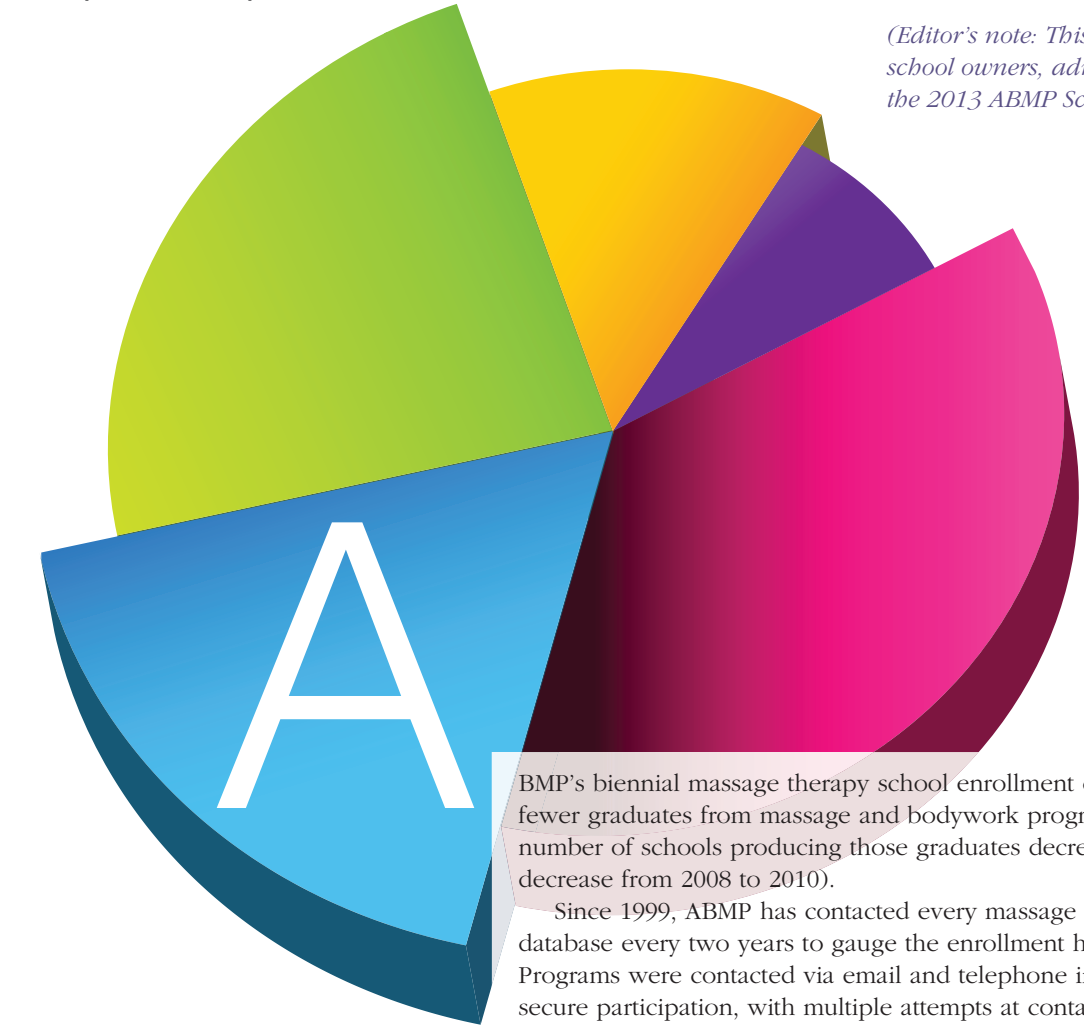
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More resources for schools at [ABMP.com](http://ABMP.com)

## The “Still” Shrinking Pie Massage and bodywork education universe continues to contract

By Les Sweeney, NCTM

*(Editor's note: This report was first presented to school owners, administrators, and instructors at the 2013 ABMP School Issues Forum.)*



BMP's biennial massage therapy school enrollment census revealed that there were 19% fewer graduates from massage and bodywork programs in 2012 than in 2010, and the number of schools producing those graduates decreased 9% since 2010 (following a 10% decrease from 2008 to 2010).

Since 1999, ABMP has contacted every massage and bodywork program in its database every two years to gauge the enrollment health of the school universe. Programs were contacted via email and telephone in January and February 2013 to secure participation, with multiple attempts at contact made to each school; the 2013 census included answers from 82.9% of recognized massage programs in the United States. Enrollment estimates for the remainder of programs were constructed based on prior participation, program type, and trend data from the programs that did respond. Each program contacted was asked three questions:

1. How many students are enrolled in your primary training program?
2. Is that number up, down, or about the same as a year ago?
3. How many people graduated from that program in 2012?

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September 13-15, 2013  
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## Programs

One result of the census exercise is a refined list of programs in operation; the number of entities offering programs decreased from 1,440 in 2011 to 1,319 today. This represents the second consecutive decline in the number of massage therapy programs as reported by the census.

In order to better analyze the results, ABMP organizes schools into five different categories, as defined below:

**Career Training Institution**—Multiprogram institutions offering many career training programs in addition to massage therapy (typically medical and dental assisting, medical recordkeeping, etc.); nearly all are accredited by US Department of Education-recognized accrediting programs, either privately held or publicly traded.

**College**—Massage programs offered at state-run community or technical colleges. Institutions are regionally accredited.

**Corporate Massage School**—Institutions offering massage therapy and spa programs, typically multicampus, multistate. Nearly all are accredited by US Department of Education-recognized accrediting programs. Each campus is counted as a distinct program.

**Proprietary**—Institutions offering massage therapy (and sometimes also spa) programs, typically single campus, single owner.

**Public School**—Massage programs offered at institutions that are part of the local public school system. Institutions are regionally accredited.

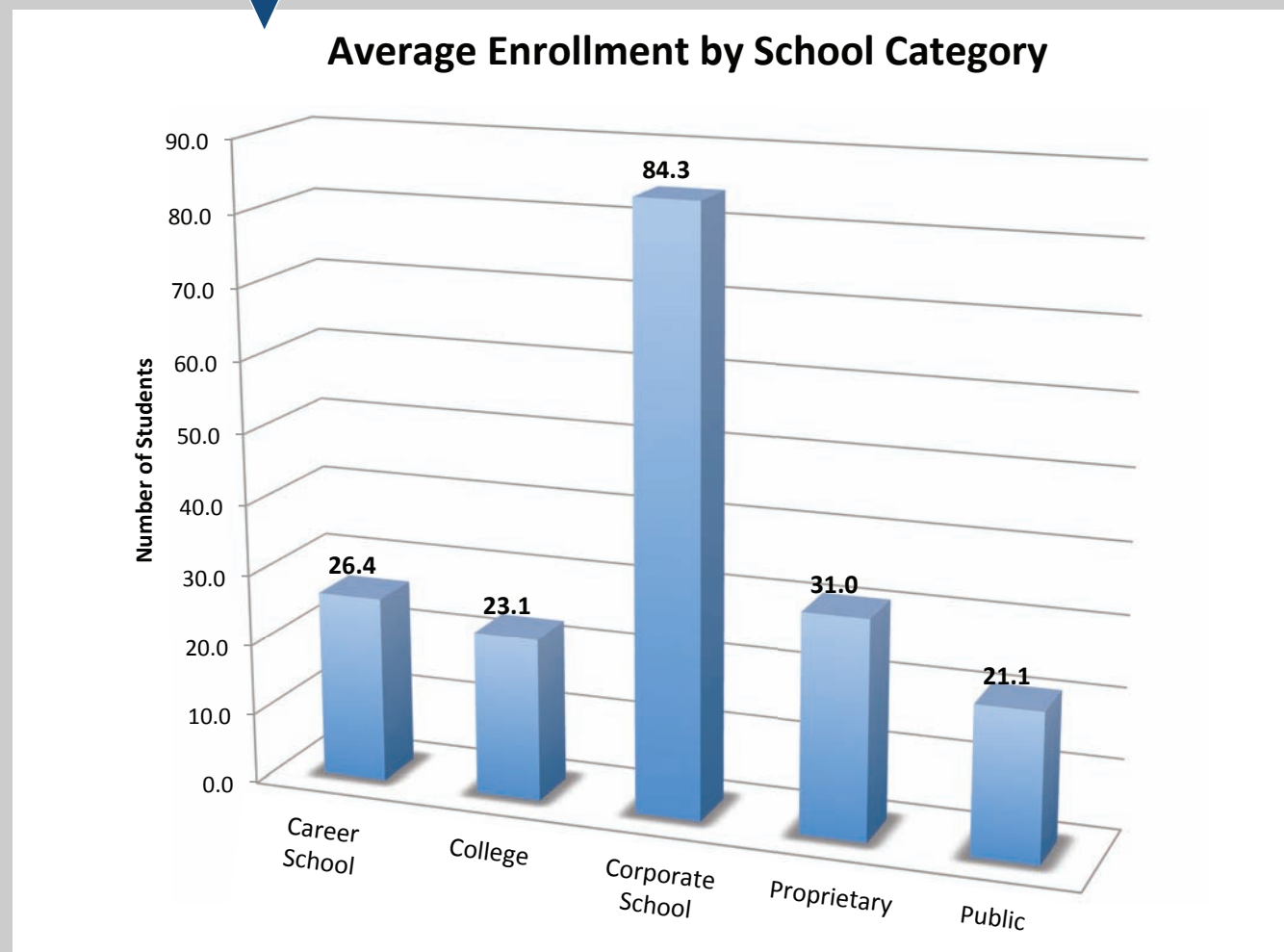
The number of career training institutions declined 9% since 2011, while the number of proprietary schools declined slightly more than 4% during the period.

School Categories	# of Schools	%
Career Training Institution	370	28%
College	185	14%
Corporate Massage School	60	5%
Proprietary	686	52%
Public	18	1%
	<b>1,319</b>	

## Enrollment

The student population at massage therapy programs declined 18.8% from 2011 to 2013, continuing a decline from the historical peak reported in spring 2005. The 2013 student population at the time of this survey was 40,587.

The five school categories show different enrollment averages:



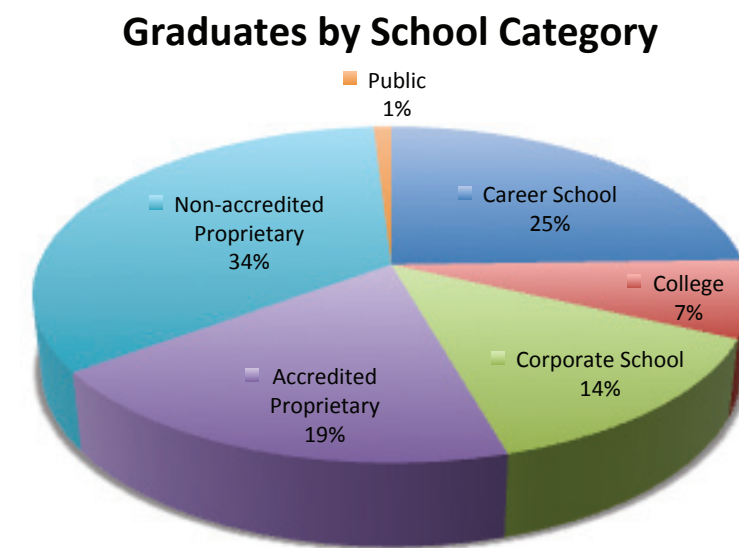
## Self-Reported Trends

Those programs that participated in the survey provided a self-assessment regarding their enrollment by answering question #2 (“Is that total up, down, or about the same as last year?”). The 2013 responses show a decline in positive reporting over 2011 results, with just 26.2% of respondents reporting growth in enrollment from 2010.

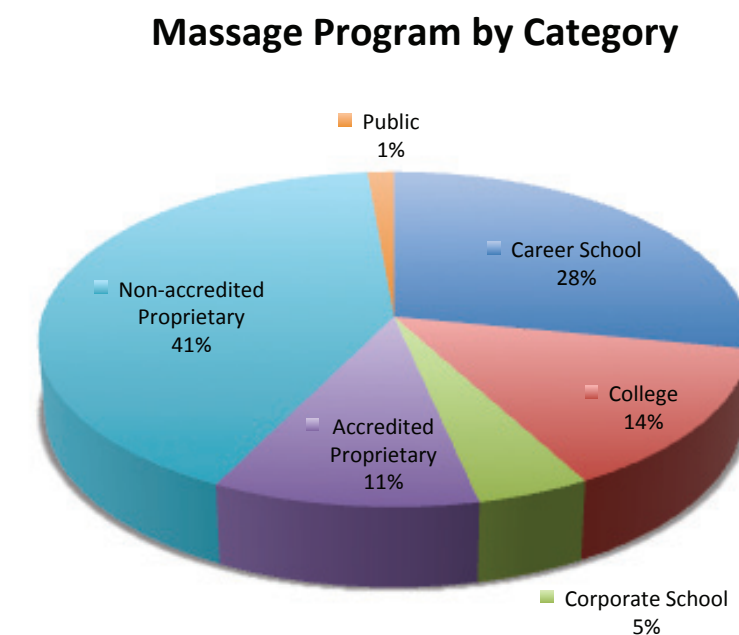
## Graduates

The number of graduates in 2012 (39,251) extended a now eight-year decline from the historical peak of 2004, representing a 45% drop during the eight-year period. The number of graduates from massage therapy programs in 2010 dipped below 40,000 for the first time since 1998. However, the last time fewer than 40,000 students graduated from massage therapy programs in a year, there were nearly 700 fewer schools (in 1998).

The distribution of graduates by program category shows corporate massage schools graduate 14% of all students, despite only representing 5% of all programs. Note: Proprietary schools are segmented into two subsets—accredited and nonaccredited.



The significance of accreditation status for proprietary schools can be seen by comparing the above graphic with the following one, which shows the proportion of all schools by category.



The attrition in the number of programs hit each school category—each of the five program categories declined from 2011 totals.

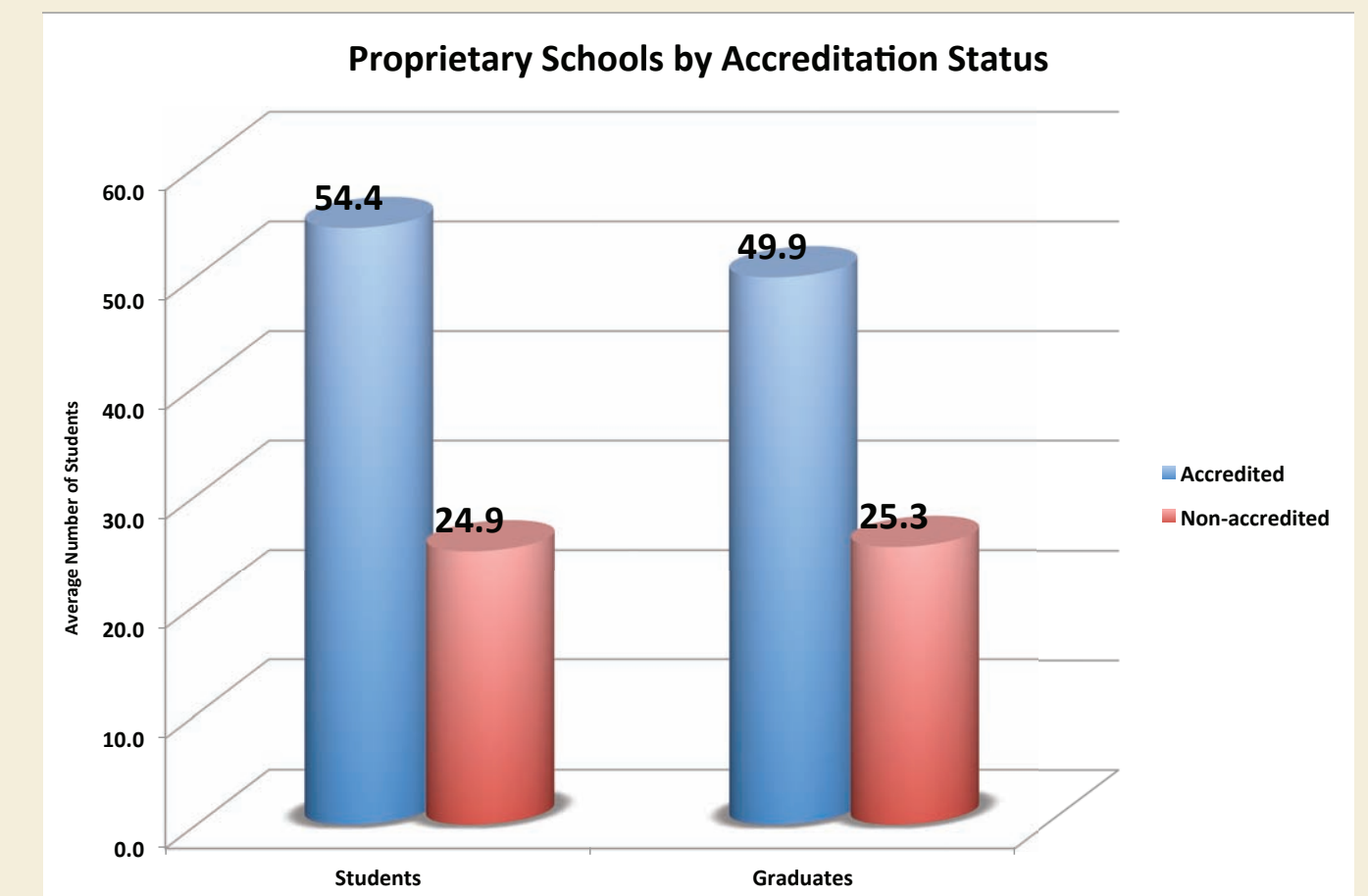
Two categories stand out because they have a larger market share than their program count would indicate. As previously mentioned, corporate massage schools represent 5% of all programs, but graduate 14% of all students. Accredited proprietary schools represent 11% of all programs but graduate 19% of all students.

The converse exists for nonaccredited proprietary schools and colleges—both graduate a smaller proportion than their program count represents.

## More Focus on Proprietary Schools

In four of the five school categories identified, access to federal (Title IV) financial aid is essentially automatic—only a couple career training institutions are not Title IV-eligible, and all corporate massage school, college, and public institution programs are Title IV-eligible.

A significant segment of non-Title IV programs populate the proprietary school category. Of the 686 programs in this category, only 141 (20.6%) of programs are accredited and Title IV-eligible. The enrollment survey gives insight to the difference accreditation and Title IV funding can make in a school's enrollment profile.



Accredited programs on average graduate nearly twice as many students as their nonaccredited colleagues.