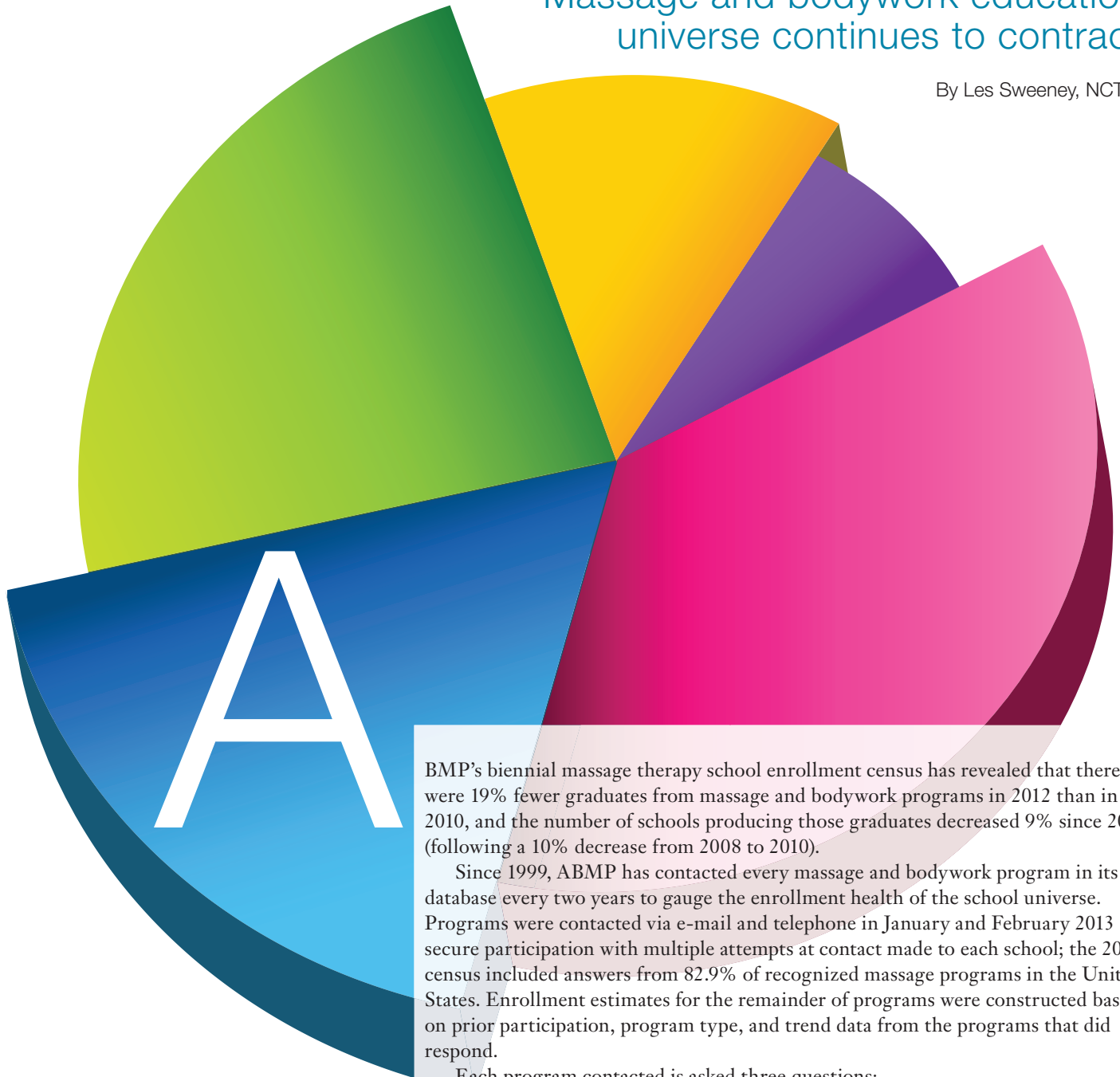


The ^{still} Shrinking Pie

Massage and bodywork education universe continues to contract

By Les Sweeney, NCTM

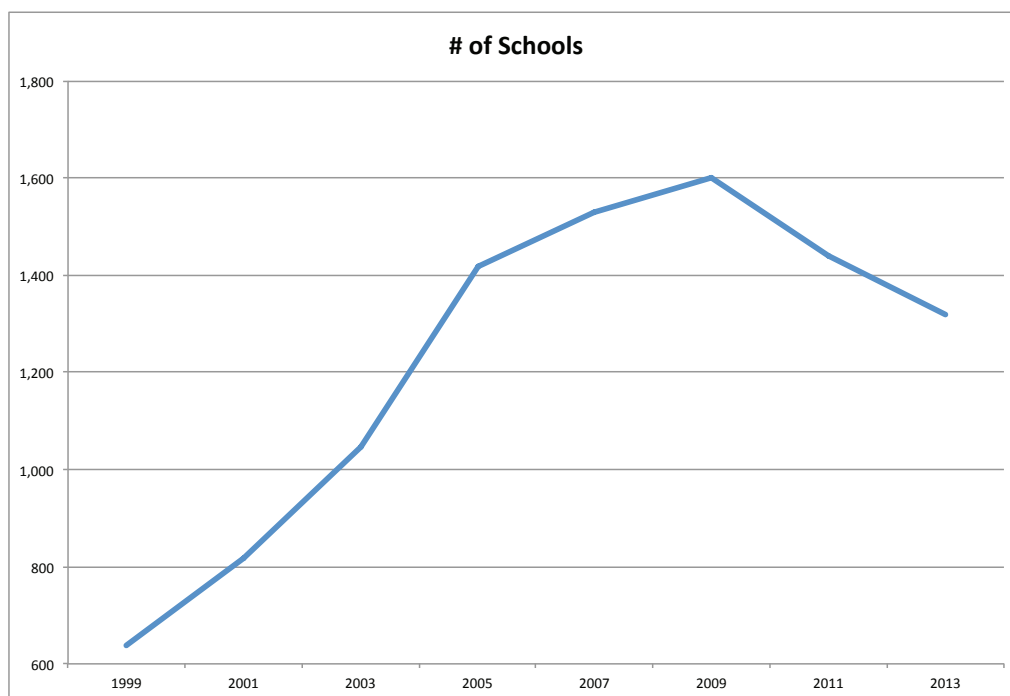


Each program contacted is asked three questions:

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?

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—Multi-program institutions offering many career training programs in addition to massage therapy (typically medical and dental assisting, medical record-keeping, etc.), nearly all accredited by U.S. Department of Education-recognized accrediting programs, either privately-held or publicly-traded.

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

Corporate Massage School—Institutions offering massage therapy and spa programs, typically multi-campus, multi-state. Nearly all accredited by U.S. 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.

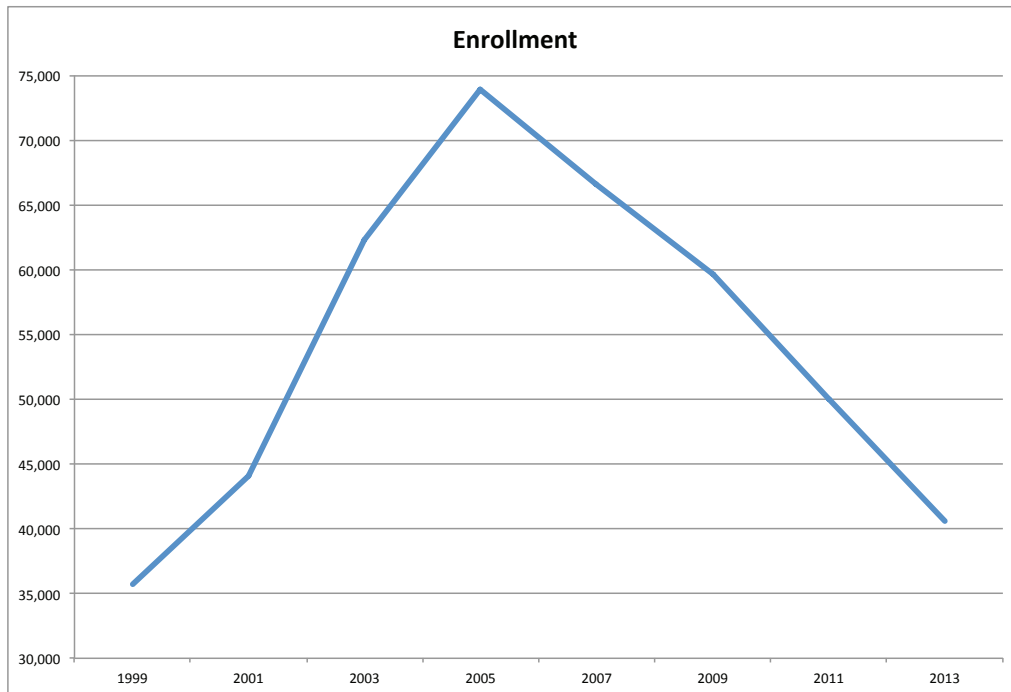
Public School—Massage programs offered at institutions that are part of the local public school system. Institutions are regionally accredited.

Grads by School Category	Schools
Career Training Institution	370
College	185
Corporate Massage School	60
Proprietary	686
Public	18
	1,319

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

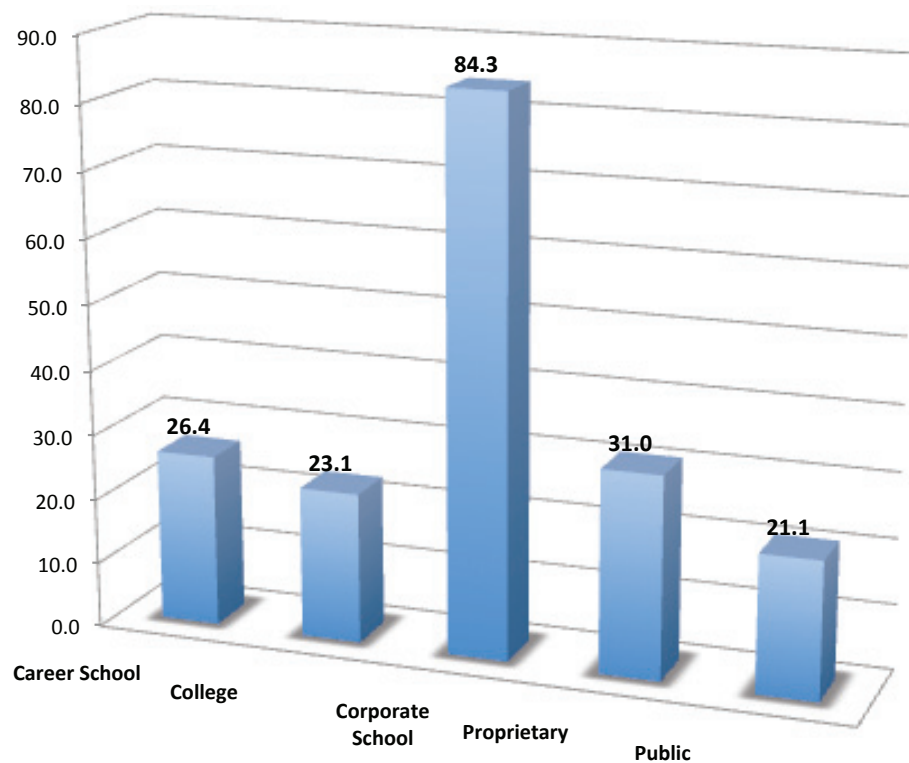
ENROLLMENT

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.



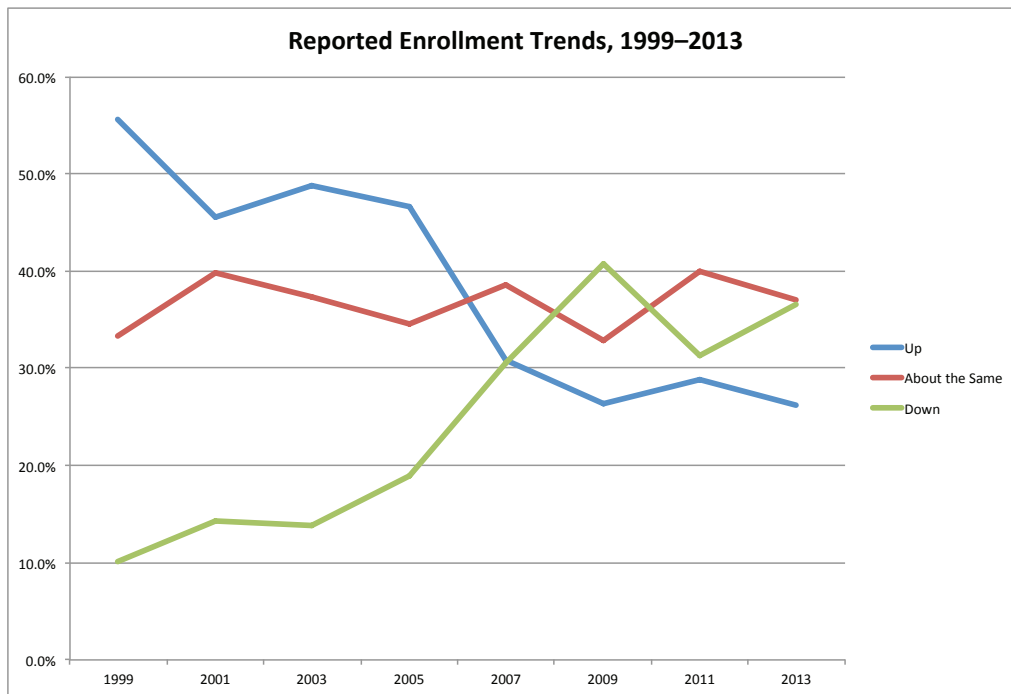
The five school categories show different enrollment averages:

Enrollment by School Category



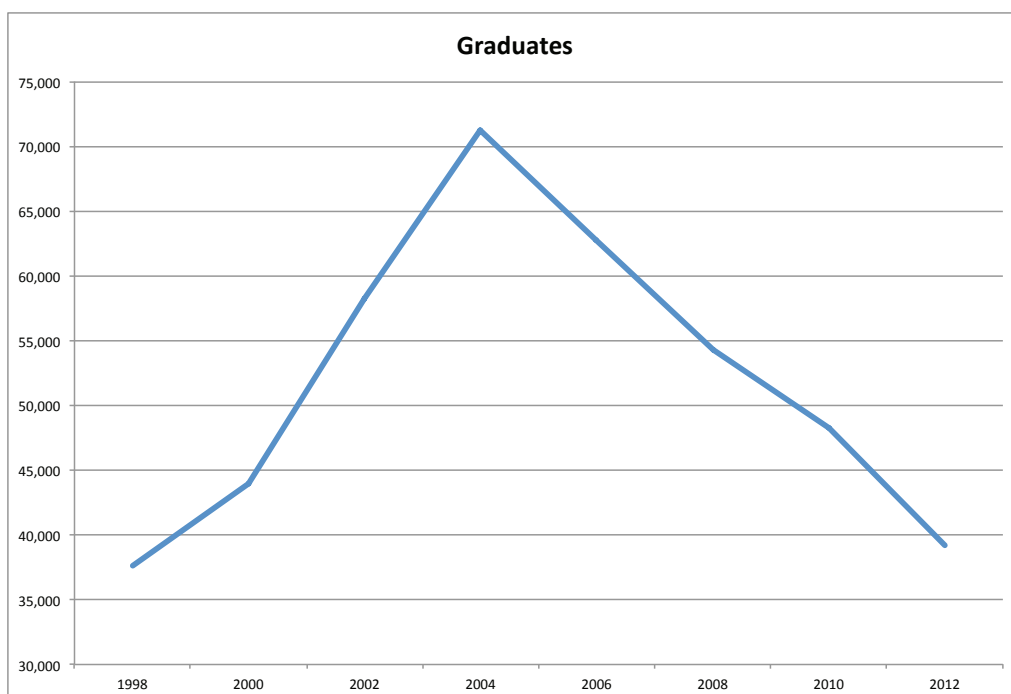
SELF-REPORTED TRENDS

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.

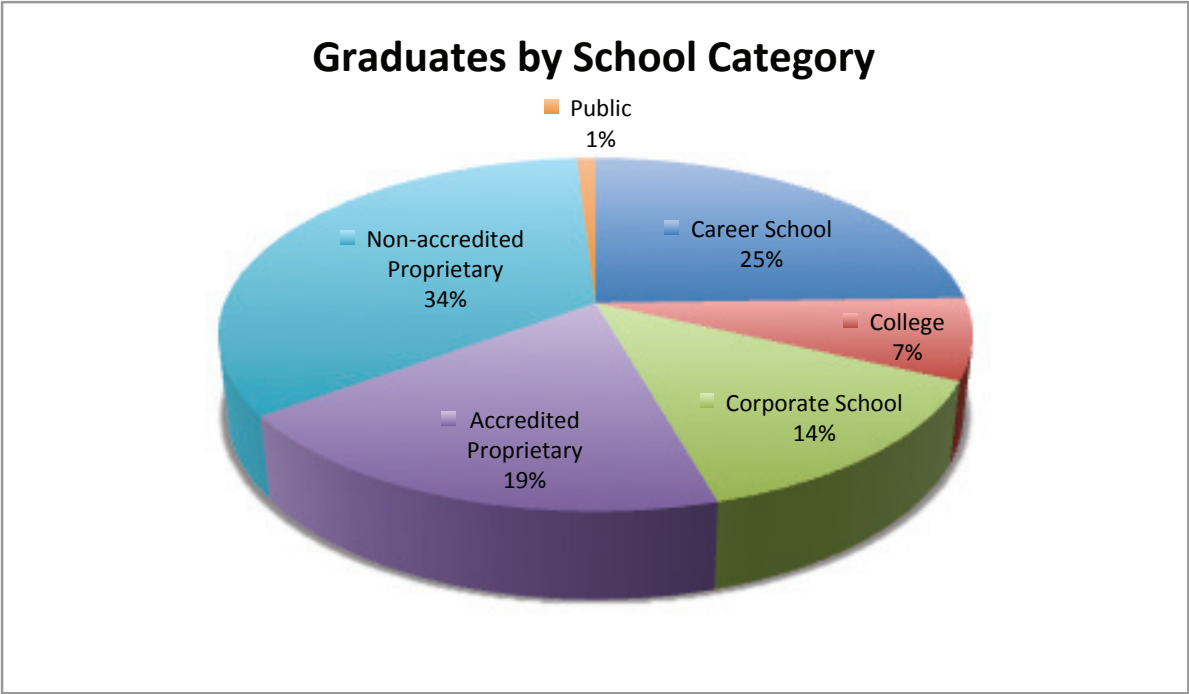


GRADUATES

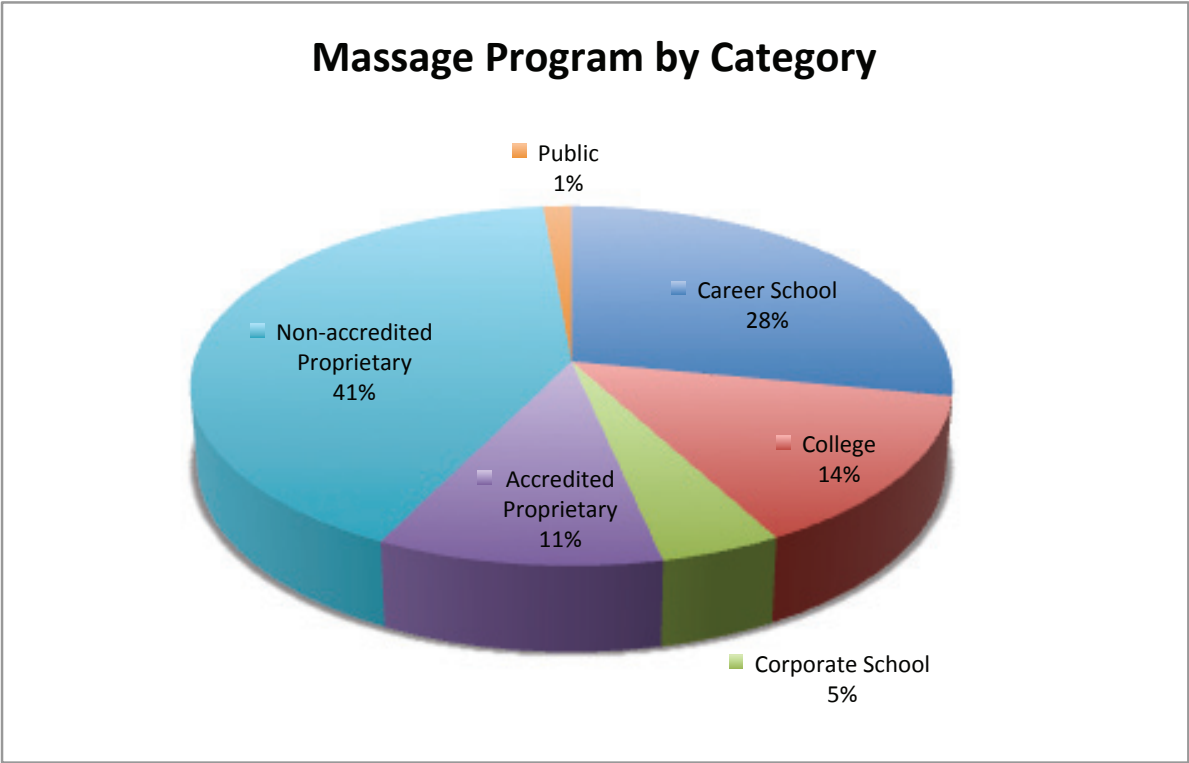
The number of graduates in 2012 extended a now eight-year decline from the historical peak of 2004, representing a 45% drop during the eight-year period. The number of graduates from massage therapy programs in 2010 dipped below 40,000 for the first time since 1998. However, the last time fewer than 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 that Proprietary schools are segmented into two subsets—Accredited and Non-accredited.



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.



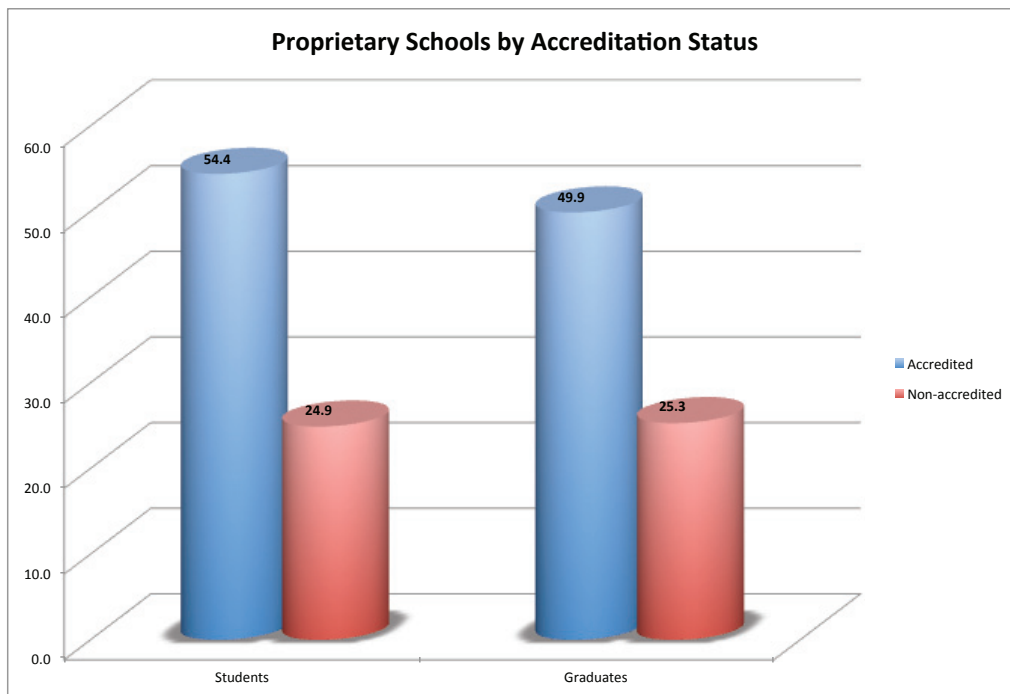
Two categories stand out because they have a larger market share than their program count would indicate. As previously mentioned, Corporate Massage Schools represent 5% of all programs, but graduate 14% of all students. Accredited proprietary schools represent 11% of all programs but graduate 19% of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

The converse exists for non-accredited 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 non-accredited colleagues.

CONCLUSIONS

Several items stand out when reviewing the data gathered:

- 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 U.S. 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 towards students. In other words, the “belt-tightening” has and will continue to effect 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 down 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 U.S. 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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