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Research and Consulting for Higher Education

Prospective Online Program Development for an Online Master of Music Education



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Supply and Demand Market Indicators Suggest Future Opportunity for an Online Master of Music Education Degree

- **Labor Outlook is Favorable Regionally***: Throughout Georgia, postsecondary music teachers are projected to experience faster than average growth from 2010 to 2020.
  - This growth rate (32.5%) is on par with postsecondary teachers in the aggregate (29.3%), indicating that postsecondary music teachers will remain an established portion of the overall postsecondary teacher market.
- **National Conferral Trends are Relatively Stable and Regional Competition is Currently Limited:** Between 2007 and 2011, national degree conferrals saw minimal growth (0.1%), suggesting that the demand for a Master of Music Education did not change. During this same time, only three providers (excluding UGA) conferred degrees regionally*, none of which offered online programs.
  - Given the potential increase in demand indicated by labor projections, and the lack of regional competition, UGA may be well positioned to realize opportunity in this marketplace moving forward.
  - Since Eduventures' research^ has found that 80% of online students enroll within 75 miles of where they live, regional students seeking an online master's program in music education may be more likely to choose UGA's proposed program over others; no other regional providers offer online delivery.
- **Cannibalization From Current UGA Offerings May Be a Concern:** A new program, regardless of delivery mode, may attract students who would have typically enrolled in already established on-ground UGA programs.
  - This potential scenario is further supported by a lack of regional providers and the projected increase in demand.
  - To contextualize this concern, it is essential to better understand current students' attitudes towards online education and capacity of current programs to absorb demand increases.

© 2013 Eduventures, Inc. *Regionally is defined by a 100 mile radius around Athens, GA. ^Eduventures' Online Higher Education Market Update, 2011.

Several Emerging Themes Are Important to Consider When Developing an Online Master of Music Education Program

- **Delivery Modality and Program Structure Focus on Flexibility:** To accommodate potential students, four out of five programs can be completed 100% online, and asynchronous classes are offered year-round. Three out of five programs offer hybrid delivery, with only one program requiring courses that are on-campus only.
  - When targeting a national audience, UGA should provide an option to complete all courses online since these students would most likely not be able to participate in hybrid courses. As a possible differentiator, UGA may want to consider providing some optional synchronous online courses to better connect distance learning students. However, further research may be needed to determine whether or not this aligns with student demand, as this may decrease flexibility.
- **Content Specialization is Limited:** Only one out of five programs offers different areas of musical emphasis, along with a specific teacher education focus.
  - To distinguish its program from other online providers, UGA may want to develop optional specializations that attract students looking for more of a focus within certain areas of music.
  - In addition, UGA may want to leverage its on-ground preparation for Georgia Teacher Certification to provide a similar option for online students who are interested in teaching in Georgia public schools.
- **Marketing Articulates Program Benefits and May Vary Between National and Regional Audiences:** To stand out from other online competitors, UGA should highlight its value proposition and leverage the prestige of the Hodgson School of Music.
  - When targeting a national audience, UGA should consider messaging that focuses more on building brand awareness and promoting 100% online delivery.
  - For regional messaging, UGA may want to more heavily promote hybrid delivery, teacher licensure, and regional alumni networks.
  - Across target audiences, it will be important to visibly promote the Hodgson School of Music's accreditation by the National Association of Schools of Music (NASM), as all schools profiled have this distinction clearly displayed on their website. This will also help strengthen the quality associated with UGA's proposed program.

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Project Overview and Methodology

Project Overview:

- University of Georgia (UGA) is interested in exploring the viability of a new online master's degree program in music education
- To help support the decision-making process regarding these two proposed programs, UGA has partnered with Eduventures to gain insight on national and regional supply and demand indicators

Methodology:

- To address this objective, Eduventures explored the following supply and demand indicators, both regionally* and nationally:
  - National Center for Education Statistics' (NCES) Integrated Postsecondary Education Data System (IPEDS)
    - Conferral trends between 2007-2011 for master's programs aligning with Music Teacher Education (based on CIP code 13.1312).
  - Bureau of Labor Statistics (BLS) and Georgia Department of Labor data
    - Employment projections were analyzed for art, drama, and music teachers, postsecondary and post secondary teachers (based on SOC codes 25-1121 and 25-1000).
  - Institutional websites of key selected competitors^
    - Programmatic trends examined for institutions providing online master's degree programs in music education

*Regionally is defined by a 100 mile radius around ZIP code 30602.
^Among competitors with online delivery, Eduventures selected the top five conferrers for profiling

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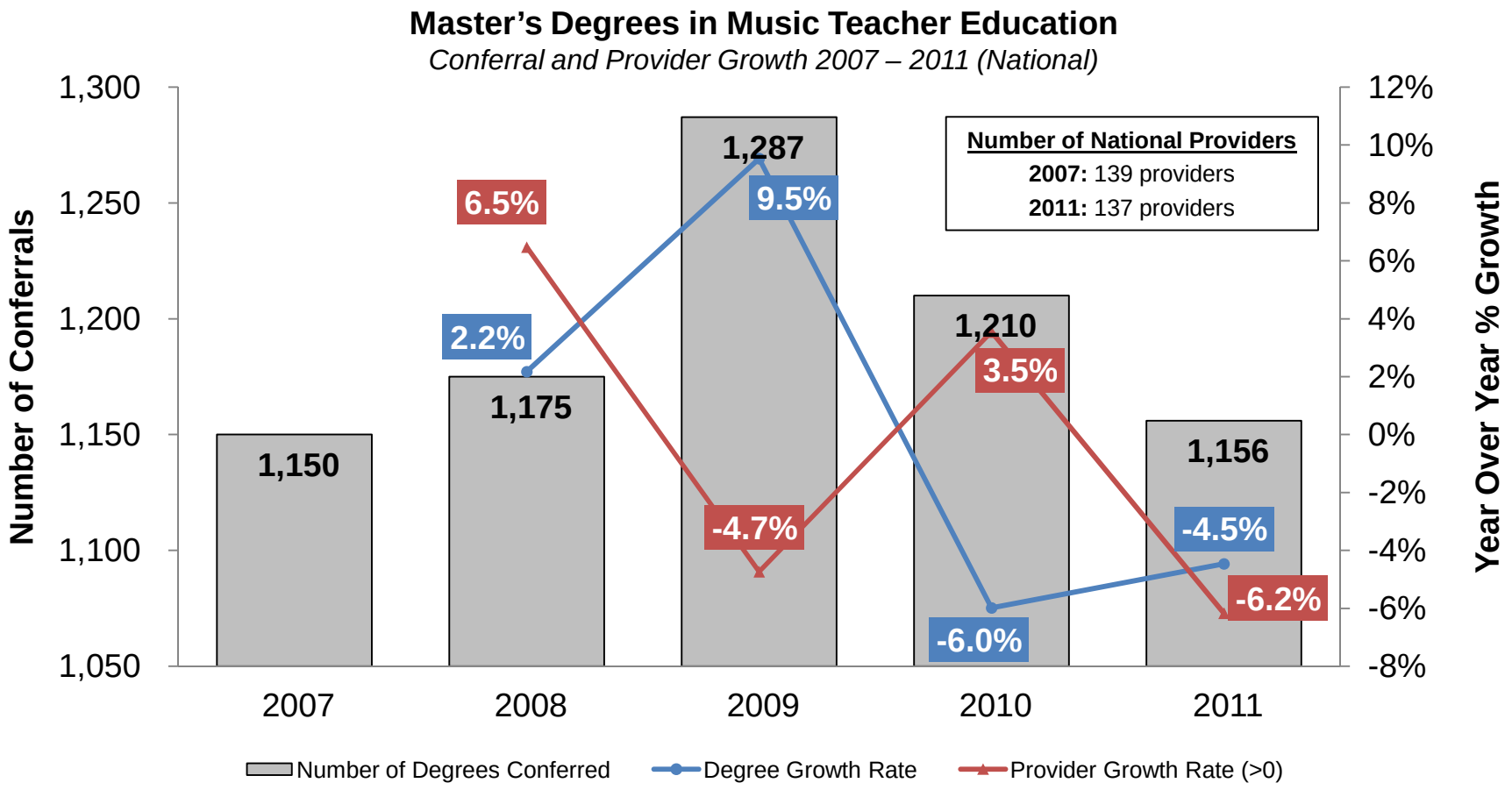
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Conferral Trends

After a Period of Modest Growth Followed by Modest Decline, the Number of Degrees Conferred and Providers in 2011 Have Returned to 2007 Levels



Please note that although there has been some volatility from 2007 – 2011, overall changes are nominal and speak to general stability in supply and demand.

Source: IPEDS

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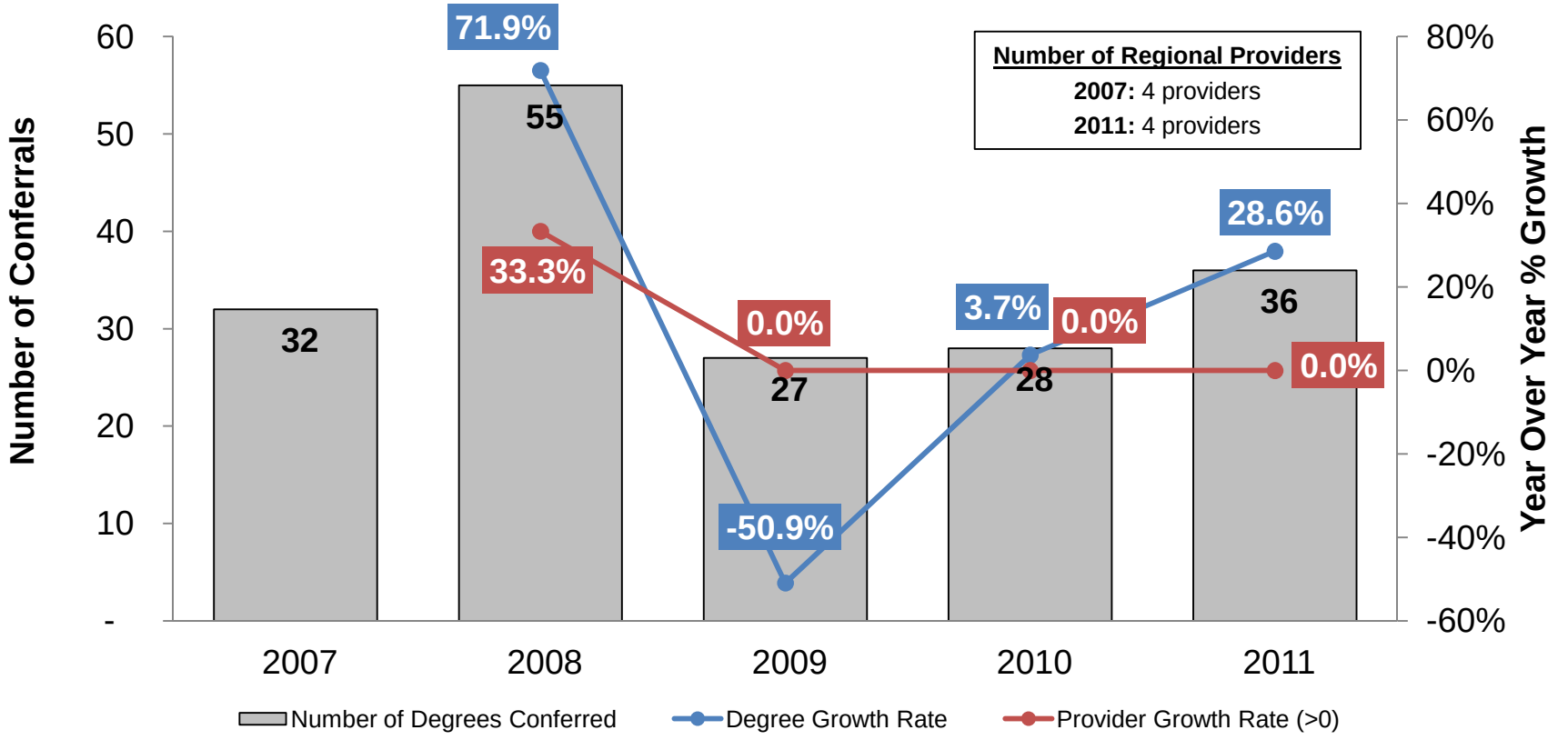
Please see Appendix C for more detail regarding national conferral data.

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Regional* Conferral and Provider Trends From 2007 to 2011 Are Consistent With National Trends, Suggesting Regional Supply and Demand Are Being Satisfied

Master's Degrees in Music Teacher Education

Conferral and Provider Growth 2007 – 2011 (Regional)*



Please note that although there has been some volatility from 2007 – 2011, supply and demand ratios seem equal in 2007 and 2011. Thus, there is not an overwhelming number of degrees and no providers, or an overwhelming number of providers and no degrees.

Source: IPEDS

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*Regional is defined by a 100 mile radius around ZIP code 30602.
Please see Appendix C for more detail regarding regional conferral data.

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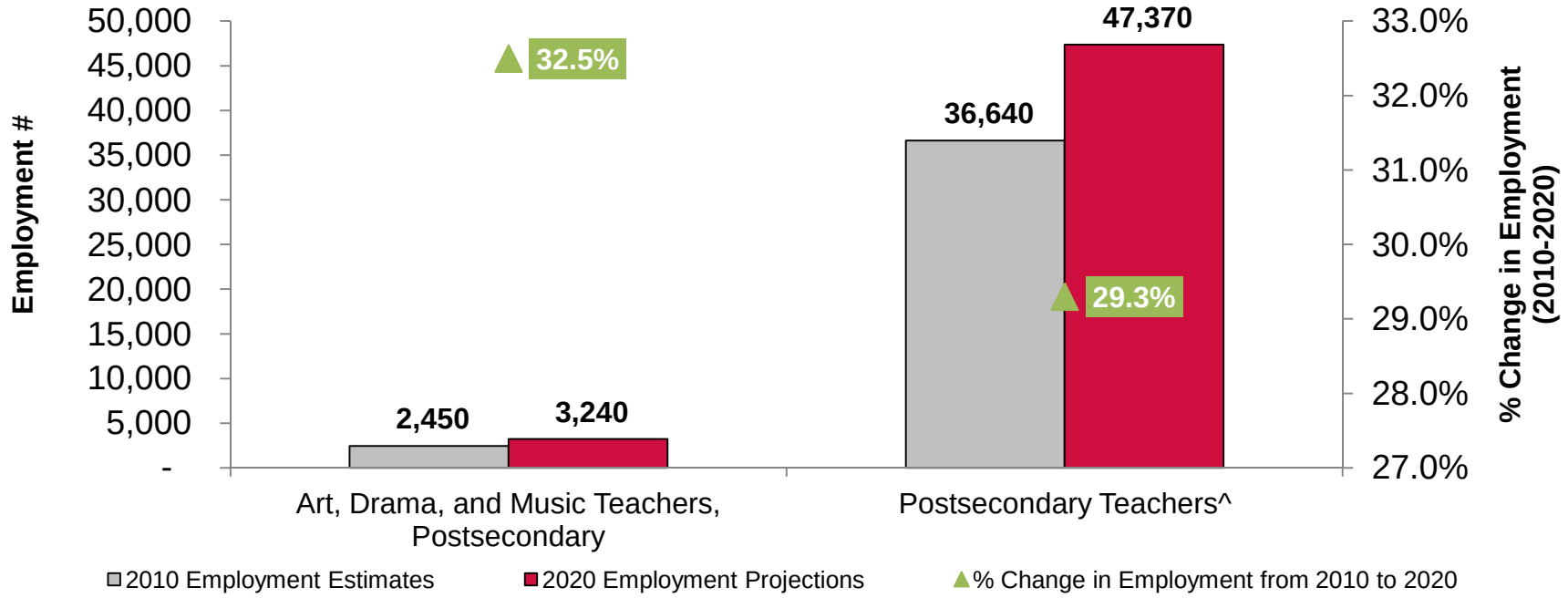
Occupational Projections

Postsecondary Music Teacher-Related Occupations Are Projected to Grow Much Faster Than Average from 2010 to 2020, Leading to Potential Increased Demand of Music Education Graduates

The average growth rate from 2010 to 2020 for all occupations is 14.3%.

Postsecondary Teacher Employment

Estimates and Projections 2010 – 2020 (Regional)*



Please note that national data is reported as an aggregate postsecondary number, so individual disciplines (e.g., music) are not available for analysis.

Postsecondary Music Teachers are growing at a similar rate to Postsecondary Teachers in the aggregate, indicating healthy demand for Post Secondary Music Teachers.

Source: Georgia Department of Labor

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*Regional is defined by a 100 mile radius around ZIP code 30602.

^Georgia Department of Labor does not provide an aggregate number for total number of Postsecondary Teachers; Eduventures aggregated each unique postsecondary occupation to comprise a total.

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To Better Understand the Competitive Characteristics of the Market, Institutions Were Selected for In-Depth Profiling

- The following institutions were included in the review:

Institution	Program Name
Boston University	*Master of Music in Music Education*
East Carolina University	*Master of Music in Music Education*
Southern Mississippi University	*Master of Music Education*
University of Florida	*Online Master of Music in Music Education*
University of South Florida	*Master of Arts in Music Education*

**Please note that all programs above offer online delivery.*

- Program profiling focused on the following characteristics:
  - Program delivery mode
  - Program structure
  - Marketing messaging
  - Specializations
  - Accreditation
  - Credit requirements
  - Cost per credit
- In addition to the competitors profiled, UGA should also explore on-campus programs near its region.
  - For example, Florida State University and the University of North Carolina at Greensboro were among the top ten national market leaders for degrees conferred in 2011.

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Part-Time Completion and Asynchronous Courses Are Common Among Competitors; Distinct Specializations Are Rare

- **Delivery Mode:** Four out of five profiled programs offer 100% online delivery, and three of five profiled programs offer hybrid delivery. All programs deliver courses asynchronously, with one program providing optional synchronous courses, too.
  - ***Implication:*** *While developing online capabilities, UGA may want to consider offering both a 100% online delivery and hybrid delivery. UGA will be able to leverage resources from the already established on-ground program for hybrid delivery and can then determine if one particular delivery mode better meets the needs of its target students.*
- **Program Structure:** All profiled programs offer both full-time and part-time completion options, along with summer courses. Only one program requires courses that are only offered on-ground.
  - ***Implication:*** *Given the flexibility offered by competitors and the scheduling needs of the potential target audience, UGA should explore the viability of summer and part-time program offerings further.*
- **Specializations:** One out of the five profiled programs offers different areas (6 total) of musical expertise, along with a specific music teacher licensure track.
  - ***Implication:*** *With a lack of specializations among competitors, UGA should explore different musical areas of expertise and teacher certification (which UGA already provides in its on-ground program) as potential points of differentiation in the market place. Additionally, this approach may also help to attract a niche group of students looking for flexibility to teach at both the secondary and postsecondary levels.*
- **Accreditation:** All profiled programs are accredited by the National Association of Schools of Music (NASM). Two out of five are also accredited by the National Council for Accreditation of Teacher Education (NCATE).
  - ***Implication:*** *UGA should promote its accreditation by NASM and may also want consider NCATE accreditation to further differentiate its proposed program from competitors.*
- **Marketing Messaging:** While marketing messages vary, most highlight distance learning, the opportunity to grow professionally, and musical excellence.
  - ***Implication:*** *To stand out from potential competitors, UGA should highlight the successes of graduates from its on-ground Master of Music Education along with the overall Hodgson School of Music network that students will have the opportunity to be a part of.*

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Based on Eduventures' Analysis, All Profiled Programs Have a Key Differentiator That Helps Attract Students

Institution	Key Differentiators
Boston University	Confers the most master's degree in Music Teacher Education in the country. Only profiled program to offer asynchronous online classes, with groups of 10-15 students.
East Carolina University	ECU offers the most specializations (7 total) of programs profiled.
Southern Mississippi University	SMU is the only public institution profiled that charges all online students the same tuition, regardless of residency. The School of Music maintains a strongly diverse population and has a longstanding international reputation for musical excellence.
University of Florida	Allows students to enter the program at 3 different start times. Requires a 16-week culminating Capstone course.
University of South Florida	Only profiled program to offer its degree as a Master of Arts.

Source: Institutional websites

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All Profiled Programs Provide Some Form of Online Delivery; Only Boston University Offers Synchronous Online Courses

Institution	Program Structure	Delivery Mode
Boston University	Full-time or part-time; Summer courses available	**100% Online and Hybrid** *asynchronous and synchronous* *some on-campus available but not required*
East Carolina University	Full-time or part-time; Summer courses available	**Hybrid** *asynchronous online* *some required courses are on-campus only*
Southern Mississippi University	Full-time or part-time; Summer courses available	**100% Online and Hybrid** *asynchronous online* *some on-campus available but not required*
University of Florida	Full-time or part-time; Summer courses available	**100% Online** *Asynchronous*
University of South Florida	Full-time or part-time; Summer courses available	**100% Online** *asynchronous*

Source: Institutional websites

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Profiled Programs Require an Average of 32 Credits; Cost Per Credit Ranges From $211 (East Carolina University, Resident) to $855 (University of South Florida, Non-Resident)

Institution	Typical Time to Completion	Number of Credits	Cost per Credit	Total Credit Cost
Boston University	Less than 2 years	32	$663	$21,216
East Carolina University	Not mentioned	33-35	Resident: $211 Non-Resident: $792	Resident: $6,996-$7,420 Non-Resident: $26,136-$27,720
Southern Mississippi University	18 to 24 months	30	$352	$10,560
University of Florida	Not mentioned	33	$636	$20,976
University of South Florida	Not mentioned	30	Resident: $431 Non-Resident: $855	Resident: $12,930 Non-Resident: $25,650
Average**	N/A	32	Resident: $459 Non-Resident: $660	Resident: $14,578 Non-Resident: $21,066

Source: Institutional websites

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**Resident and Non-Resident Averages also include profiled institutions without residency-specific costs.

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Appendix A: Competitor Profiles

Boston University
Boston, MA

Degree Name	Master of Music in Music Education
Delivery Mode	**Online and On-Campus:** Online courses are delivered in an asynchronous format (video lectures) and synchronous format (groups of 10-15 students participating in live classroom sessions); on-campus courses are delivered during the summer session.
Program Structure	Each online semester is 7-weeks long, which allows students to complete two courses in a traditional 14-week semester; some student elect to attend courses on campus during the summer session; most students complete their degree in less than two years.
Specializations	None mentioned
Credit Hours	32 credit hours
Cost per Credit Hour Program Tuition	$663 per credit ($21,216)
Accreditation	New England Association of Schools and Colleges, Inc. (NEASC); National Association of Schools of Music (NASM)
Marketing Messaging	BU aims to take full advantage of the opportunities that distance education provides to connect music educators from a broad range of geographic locations; practitioners are provided with the opportunity to enhance their careers through an innovative and challenging curriculum while benefiting from the diverse expertise of world-class faculty; positively influence the music education profession by becoming the next generation of leaders.
URL	http://musiceducation.bu.edu/

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Appendix A: Competitor Profiles

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East Carolina University
Greenville, NC

Degree Name	Master of Music in Music Education
Delivery Mode	**Hybrid:** While most courses are delivered in an asynchronous format online, some courses are only offered on-campus
Program Structure	Courses are offered during the fall, spring, and summer.
Specializations	Teacher Education option (approved for North Carolina teacher licensure), which has six areas of emphasis: Pedagogical Studies, Choral Conducting, Instrumental Conducting, Suzuki Violin Pedagogy, Performance, and Music Theory/Composition; Music Therapy option, which prepares students for therapy licensing board exams
Credit Hours	33-35 credits
Cost per Credit Hour Program Tuition	Resident: $211 per credit ($6,996 - $7,420), Non-Resident: $792 per credit ($26,136 - $27,720)
Accreditation	National Association of Schools of Music (NASM); American Music Therapy Association (AMTA)
Marketing Messaging	ECU's predominantly online MM in Music Education degree was recently commended by the National Association of Schools of Music; the degree includes emphases in pedagogical studies, music therapy, choral or instrumental conducting, Suzuki sting pedagogy, performance, or theory-composition; all emphases, with the exception of music therapy, are approved for North Carolina teacher licensure; emphasis in music therapy provides entry-level music therapy credentials and eligibility to sit for the national board certification examination.
URL	http://www.ecu.edu/cs-cfac/music/musiceducation/index.cfm, http://www.ecu.edu/cs-acad/grcat/MUSC.cfm

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Appendix A: Competitor Profiles

The University of Southern Mississippi
Hattiesburg, MS

Degree Name	Master of Music Education
Delivery Mode	**100% Online and Hybrid:** Online courses are delivered in an asynchronous format; summer intensive workshops and face-to-face classes are offered on the Hattiesburg campus
Program Structure	Five required courses and five electives that can be chosen from online courses and summer intensive workshops or traditional classes offered on-campus; can be completed in 18 to 24 months.
Specializations	None mentioned.
Credit Hours	30 credit hours
Cost per Credit Hour Program Tuition	$352 per credit ($10,560)
Accreditation	National Association of Schools of Music (NASM)
Marketing Messaging	Longstanding international reputation for musical excellence – serving more than 450 majors from the United States and 15 countries, the school maintains a diverse student populations; the school is recognized for its eminence in musical artistry, education, and community service; strong placement of graduates into competitive jobs and graduate programs – many alumni hold positions as ensemble directors and studio teachers at major universities across the country and oversees.
URL	http://www.usm.edu/sites/default/files/groups/school-music/pdf/mmonline2012_0.pdf, http://www.usm.edu/sites/default/files/groups/school-music/pdf/masters.handbook.pdf

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Appendix A: Competitor Profiles

University of Florida
Gainesville, FL

Degree Name	Online Master of Music in Music Education
Delivery Mode	**Online:** Courses are delivered in an asynchronous format.
Program Structure	Use a planning period, non-performance evenings, or weekend hours to complete assignments; 8-week courses; 2 courses per 16-week semester; 16-week culminating Capstone course; 3 starts per year: Fall, Spring, and Summer; complete in as few as 2 years.
Specializations	None mentioned
Credit Hours	33 credit hours
Cost per Credit Hour Program Tuition	$636 per credit hour ($20,976)
Accreditation	National Association of Schools of Music (NASM); National Council for Accreditation of Teacher Education (NCATE)
Marketing Messaging	Provides active music educators with the opportunity to develop both professionally and creatively, offering advanced knowledge and practical teaching techniques to more effectively bring music education to the 21st century student; combines technology, methodology, and theory in an online "classroom" where you can also share accomplishments, obstacles, best practices, and more; be inspired on a daily basis by a vibrant, online community.
URL	http://musiceducation.arts.ufl.edu/program-details/, http://musiceducation.arts.ufl.edu/docs/UF_MME_Brochure.pdf

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University of South Florida – Main Campus
Tampa, FL

Degree Name	Master of Arts in Music Education
Delivery Mode	**Online:** Courses are delivered in an asynchronous format.
Program Structure	Courses are offered during both the fall and spring semesters, as well as during the summers, so that music teachers can schedule course work for times that are most convenient for them.
Specializations	None mentioned
Credit Hours	30 credit hours
Cost per Credit Hour Program Tuition	Residents: $431 per credit ($12,930), Non-Residents: $855 per credit ($25,650),
Accreditation	Commission on Colleges of the Southern Association of Colleges and Schools (SACS); National Association of Schools of Music (NASM); National Council for Accreditation of Teacher Education (NCATE)
Marketing Messaging	Program is designed to empower students as sophisticated consumers of research related to music education practice and theory; courses are conveniently offered “at-a-distance” and during fall, spring, and summer semesters.
URL	http://music.arts.usf.edu/content/templates/?a=930&z=388, http://music.arts.usf.edu/content/articlefiles/930-ma.pdf

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Appendix B: Labor Market Data

Detailed Labor Market Data:

SOC Codes/Occupation		Employment Trends					
		Geographic Level	*Employment Estimates*		*Employment Change (2010-2020)*		Entry-Level Education
			2010	2020	Number	Percent	
25-1121	Art, Drama, and Music Teachers, Postsecondary	National	N/A	N/A	N/A	N/A	N/A
		Georgia	2,450	3,240	790	32.2%	Doctoral
25-1000	Postsecondary Teachers*	National	1,756,000	2,061,700	305,700	17.4%	Master's degree
		Georgia	36,640	47,370	10,730	29.3%	Doctoral

Please note that national level data is not available for SOC code 25-1121.

*Georgia Department of Labor does not provide an aggregate number for total number of Postsecondary Teachers; Eduventures aggregated each unique postsecondary occupation to comprise a total.

The average growth rate from 2010 to 2020 for all occupations is 14.3%.

Source: BLS and Georgia Department of Labor

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Appendix C: Conferral Data

Detailed National Conferral Data:

Top 10 National Degree Conferrals for CIP Code 13.1312 (Master of Music Teacher Education)				
School	**State**	**National Market Share (2011)**	**Degrees Conferred (2011)**	**2007- 2011 CAGR****
Boston University	MA	11.0%	127	38.0%
VanderCook College of Music	IL	6.1%	71	0.7%
Teachers College at Columbia University	NY	4.6%	53	-9.5%
New York University	NY	2.9%	34	5.9%
University of St Thomas	MN	2.9%	33	60.3%
CUNY Queens College	NY	2.4%	28	11.7%
Florida State University	FL	2.2%	26	1.0%
Syracuse University	NY	2.0%	23	2.3%
University of North Carolina at Greensboro	NC	1.9%	22	16.4%
University of Georgia	GA	1.6%	19	0.0%

**CAGR (Compound Annual Growth Rate) represents the smoothed annual growth rate over a given time period.

Source: IPEDS

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Appendix C: Conferral Data

Detailed Regional* Conferral Data:

Top 10 Regional* Degree Conferrals for CIP Code 13.1312 (Master of Music Teacher Education)					
School	**State**	**National Market Share (2011)**	**Regional* Market Share (2011)**	**Degrees Conferred (2011)**	**2007- 2011 CAGR****
University of Georgia	GA	1.6%	52.8%	19	0.0%
Georgia College & State University	GA	0.7%	22.2%	8	N/A
Bob Jones University	GA	0.5%	16.7%	6	4.7%
Piedmont College	GA	0.3%	8.3%	3	-21.7%

**CAGR (Compound Annual Growth Rate) represents the smoothed annual growth rate over a given time period.

Source: IPEDS

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*Regional is defined by a 100 mile radius around ZIP code 30602.

Appendix C: Conferral Data

Detailed National and Regional* Trends:

Master's Degrees in Music Teacher Education				
	Student Demand			
	National Landscape		Regional* Landscape	
2011 Degree Conferrals	1,156		36	
2007 – 2011 Conferrals CAGR**	0.1%		3.0%	
2011 Conferrals Per Provider^	8 (avg.) / 5 (median)		9 (avg.) / 7 (median)	
	Competitive Landscape			
2011 Number of Providers^	137		4	
2007 – 2011 Providers CAGR^	-0.4%		7.5%	
% Share of Market Leader	Boston University (11.0%)		University of Georgia (52.8%)	
% Share of Top 10 Market Leaders	37.7%		100%	
Provider Breakdown^	***By Institutions***	***By Conferrals***	***By Institutions***	***By Conferrals***
For-Profit Private Public	0.6% 30.9% 46.9%	0.2% 52.8% 47.1%	0.0% 50.0% 50.0%	0.0% 25.0% 75.0%

*Regional is defined by a 100 mile radius around ZIP code 30602.

** CAGR (Compound Annual Growth Rate) represents the smoothed annual growth rate over a given time period.

^Only includes providers conferring >0 degrees in 2011.

Source: IPEDS

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