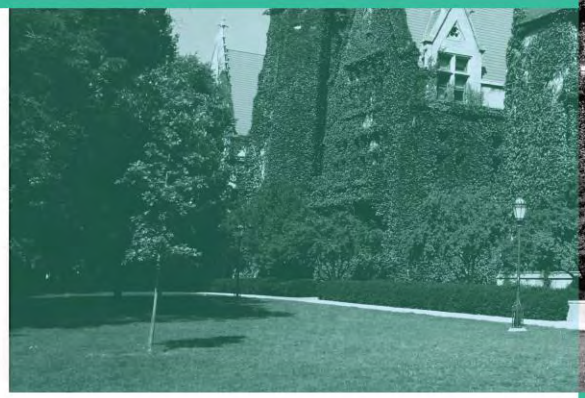
# Market Scan of New Program Opportunities

## Prepared for Stockton University

May 2018

In the following report, Hanover assesses demand for a proposed Master of Fine Arts program in Dance and Bachelor of Arts programs in Digital Literacy, Music Education, and Music Therapy. This report includes an examination of student and labor market demand, and an analysis of the competitive landscape.



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# EXECUTIVE SUMMARY

# Executive Summary

*Market Scan of New Program Opportunities*

## Recommendations

1. **Stockton should move forward with the proposed BA in Digital Literacy.**

   This program shows the most positive student and labor market indicators. Stockton should consider offering concentrations in Digital Arts and Digital Communication & Media specifically, as these both represent high growth fields from a student demand perspective.

2. **However, mixed labor market demand and declining student interest suggest that Stockton should *not* develop its proposed BA in Music Education or MFA in Dance.**

   Student conferrals across music education bachelor's programs and dance master's programs have *declined* at most geographic levels. Labor market demand indicators also suggest an uncertain job outlook for graduates of these programs.

## Demand Indicators Overview

*Geographic levels showing positive indicators of student and labor demand (in green). Competitor saturation illustrates number of similar programs in the Mid East Region. *Forecast based on secondary sources.*

| Program | Student Demand | | Labor Demand | | Competitor Saturation |
|---|---|---|---|---|---|
| | Volume | Growth | Volume | Growth | |
| **BA Music Therapy** | None | Mid East National | None | NJ Mid East National | 12 |
| **BA Digital Literacy** | Mid East | NJ Mid East National | NJ Mid East National | None | 75 |
| **BA Music Education** | NJ Mid East National | None | NJ Mid East National | None* | 59 |
| **MFA Dance** | None | None | None | NJ Mid East | 7 |

## Key Findings and Program Demand Forecast

**The proposed Digital Literacy bachelor's program represents the most viable opportunity for new program development.**

Data suggest strong student and labor market interest in the proposed program at the national, regional, and state levels. Additionally, Stockton would compete with only four similar programs in New Jersey, none of which are located in Atlantic County.

**A Music Therapy bachelor's degree may also be viable, albeit to a lesser degree.**

A BA in Music Therapy presents an opportunity to corner the market. At the state level, Stockton would only compete with Montclair State University's American Music Therapy Association accredited bachelor's program. Nationally and regionally, music therapy bachelor's programs reported faster than average conferral growth. However, low conferral volumes and a limited number of job openings for music therapists suggests further research is needed to determine whether there is truly a need for a new Music Therapy program in New Jersey.

**Both student and labor market demand for music education is in decline.**

Despite strong conferral volumes across geographic levels, five-year trends show *declining* student interest in music teaching programs. Furthermore, Stockton will compete with 59 regional programs and 3 New Jersey programs for this declining number of prospective students. The employment outlook for graduates of the proposed program may also present challenges as funding for music programs in schools are cut.

**Student interest in dance programs at the master's level is in decline, but employer demand is growing.**

Employer demand for dancers and choreographers will grow at faster than average rates in the Mid East and New Jersey. However, declining conferral volumes and a limited number of local job postings illustrate limited viability from a student demand perspective. In addition, Stockton can expect competition from two recently launched MFA in Dance programs at Rutgers and Montclair State. Given declining student conferrals, the market is likely too saturated to support a new program.

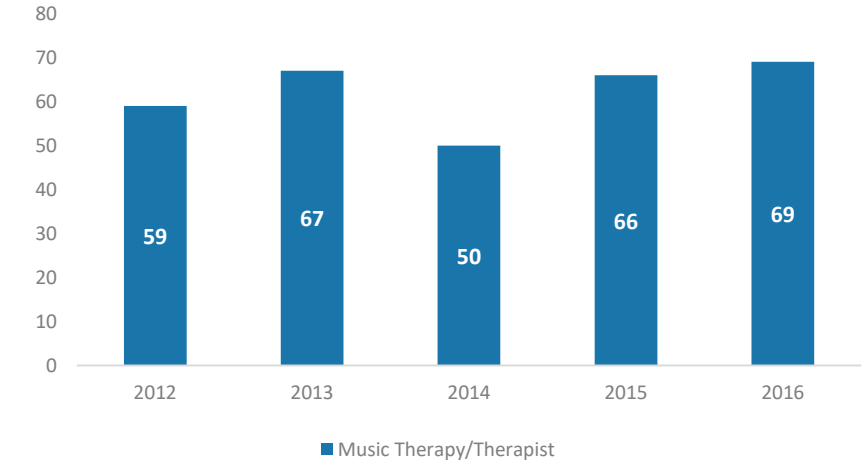
# BA IN MUSIC THERAPY

# Degree Completions Analysis

*BA in Music Therapy*

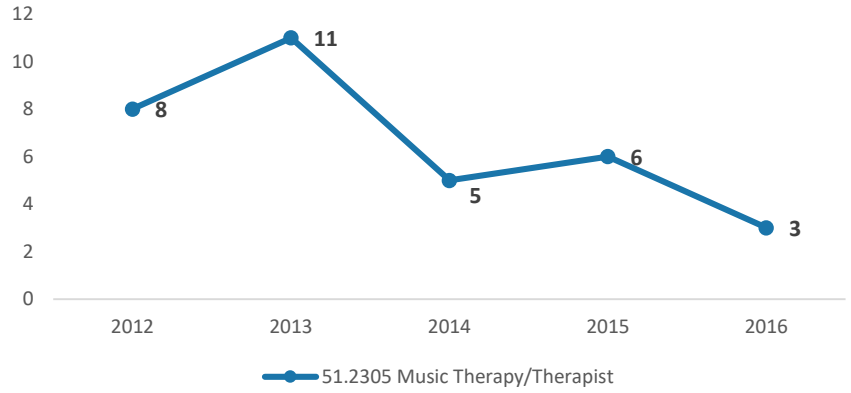
## Mid East Degree Completions Volume

*Mid East distribution of degree completions from 2012 to 2016*




## New Jersey Degree Completions Volume

*New Jersey distribution of degree completions from 2012 to 2016*




Source: IPEDS

Note: No Atlantic County institutions reported completions under relevant fields.

## Analysis of Findings

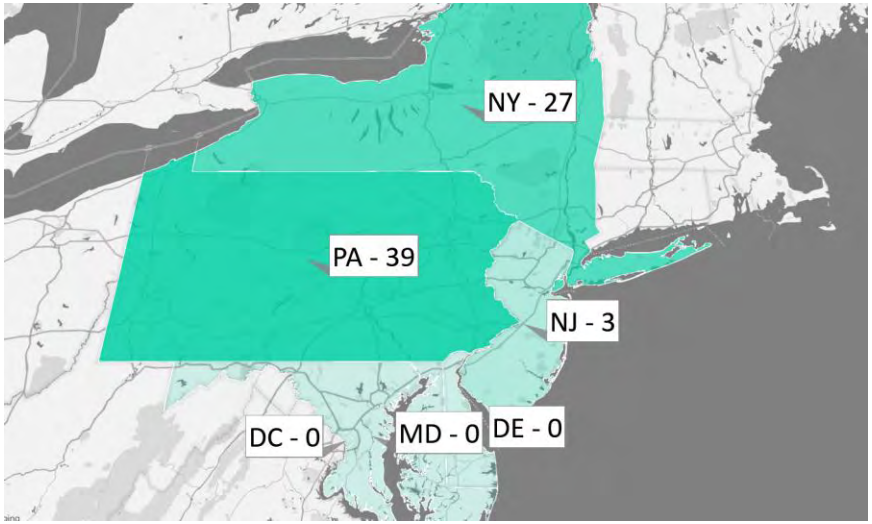
**Although conferrals from music therapy bachelor's programs have grown over the past five years, low volumes indicate that growth rates are inflated.**

Nationally and regionally, music therapy bachelor's programs reported faster than average conferral growth at rates of 10.3 and 4.0 percent, respectively. However, institutions reported less than 400 completions nationally and less than 70 completions in the Mid East, which suggests **music therapy is an emerging field of study but also a small one**.

Three institutions in New York reported a total 27 bachelor's conferrals in 2016, and nine institutions in Pennsylvania reported a total of 39 completions that same year. Half of these institutions reported declining student volume from 2012 to 2016. In New Jersey, Montclair State University is the only institution to report degree conferrals in music therapy over the past five years. Montclair State reported only 3 degree conferrals in 2016, a 73 percent drop from its highest volume of 11 degree conferrals in 2013.

## Mid East Degree Completions Volume by State

*Mid East distribution of degree completions from 2012 to 2016 by State*

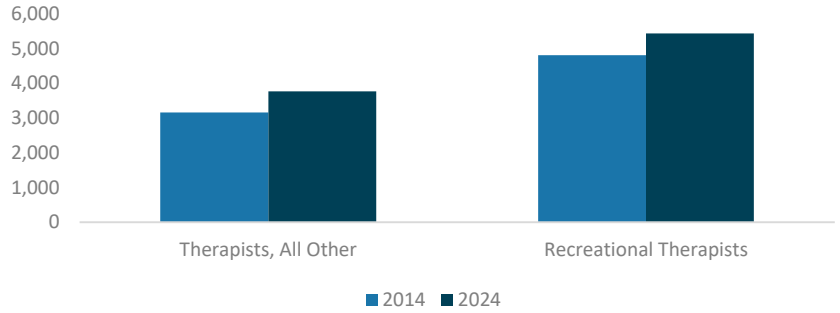


# Labor Market Analysis

*BA in Music Therapy*

## Mid East Current/Projected Job Availability

*Mid East music therapy-related positions as of 2014 and 2024 (projected)*



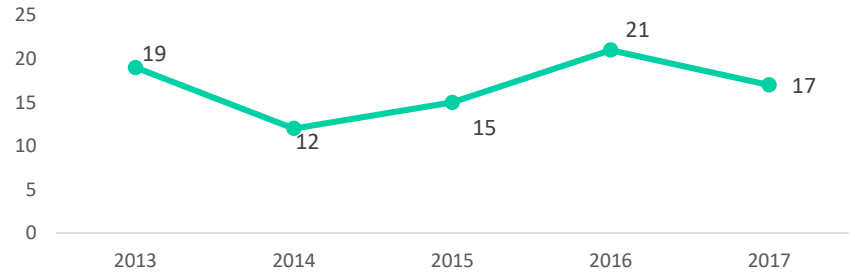

## Total Labor Market

*Aggregate music therapy-related job availability by geographic level*

| | New Jersey | Mid East | National |
|---|---|---|---|
| Baseline Year Employment | 860 | 7,970 | 43,300 |
| 10-Year Projected Employment | 930 | 9,210 | 49,400 |
| **Growth Rate** | **8.1%** | **15.6%** | **14.1%** |
| **Total Annual Openings** | **20** | **260** | **3,100** |

## New Jersey Certified Music Therapist Volume

*Number of Certified Board Music Therapists in New Jersey originally certified between 2013 and 2017*




Source: CBMT and Projections Central

## Analysis of Findings

**Labor projections illustrate a small but growing market for music therapy-related occupations.**

The number of professional therapists in non-standard fields like music therapy is projected to grow at faster than average rates in New Jersey, the Mid East, and United States as a whole. However, low volumes of annual job openings, particularly in New Jersey, may indicate a limited job market for recent graduates.

Indeed, **job postings data show only 342 postings in the United States for Music Therapists**, which exist under the broader Recreational Therapy category, over the past six months.

**However, the number of Certified Music Therapists in New Jersey has fluctuated over the past five years.**

Upon completion of an American Music Therapy Association (AMTA) approved program, graduates may sit for the national board certification exam from the Certification Board for Music Therapists, an independent, nonprofit organization accredited by the National Commission for Certifying Agencies (NCAA). To qualify for the CBMT certification, applicants must demonstrate.

- Successful completion of an American Music Therapy Association (AMTA) approved academic and clinical training program;
- Successful completion of a written objective examination demonstrating current skills in the profession of music therapy; and
- Recertification every five years through the successful completion and document of 100 recertification credits.

Currently, there are 223 Certified Music Therapists (MT-BC) in New Jersey alone. As shown in the graph to the left, the number of Certified Music Therapists seeking certification has fluctuated over the past five years, resulting an annualized *decline* of 2.7 percent.

## Methodology Note

State and region occupational employment projections correspond to 2014 to 2024 projections. National projections correspond to 2016 to 2026.

## Competitor Analysis

*Based on an analysis of regional competitors, Hanover concludes the following:*

**Stockton would face a limited competitive landscape should it develop a music therapy bachelor's program.**

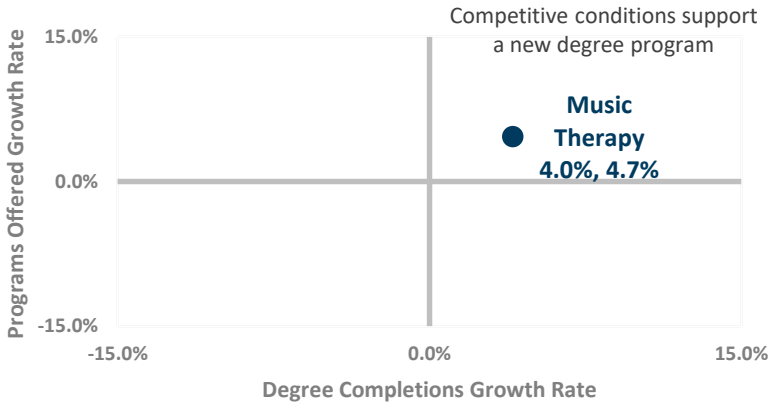
Institutions at the national level reported only 60 programs, and regional institutions reported only 12 programs that could compete with the proposed Music Therapy program. AMTA asserts that there are 75 accredited bachelor's-granting programs nationally, of which 26 also offer accredited master's programs.

**Montclair State University (MSU) would be Stockton's only competitor in New Jersey or Delaware, but student demand for MSU's program is declining**.

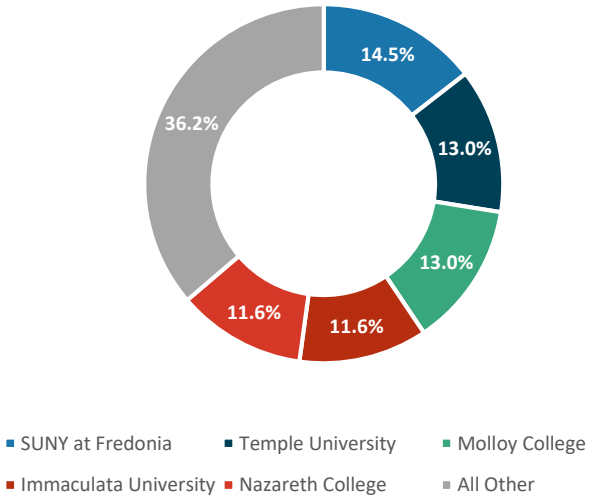
MSU is the only AMTA-accredited music therapy program in the state, and it offers accredited programs at both the bachelor's and master's levels. However, as previously discussed, MSU's bachelor's program conferred only three degrees in 2016 and has seen fluctuating demand between 2012 to 2016.

## Mid East Market Saturation (2012-2016)

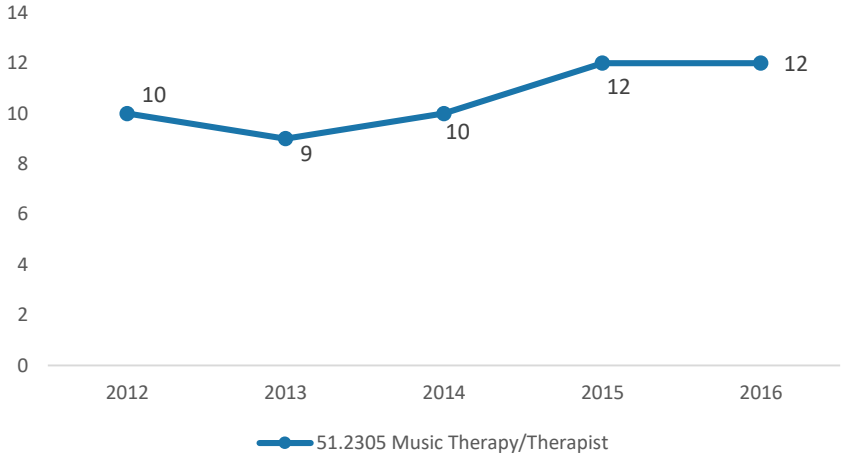
*Within the Mid East do competitive conditions support an additional music therapy program?*




## Top 5 Largest Competitors in the Mid East




## Mid East Volume of Programs (2012-2016)

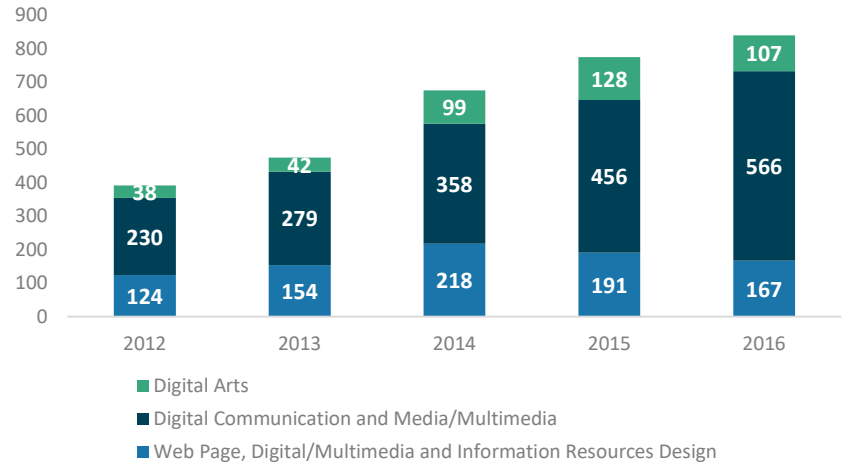



Source: IPEDS
Note: No Atlantic County institutions reported completions under relevant fields.

# BA IN DIGITAL LITERACY

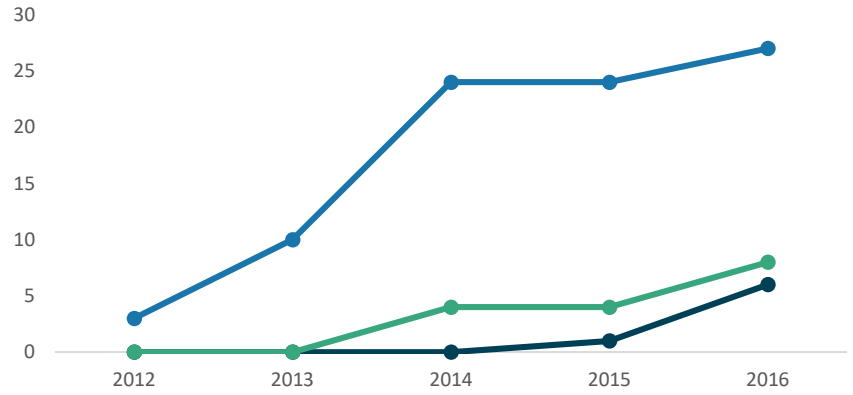
## Mid East Degree Completions Volume

*Mid East distribution of degree completions from 2012 to 2016*




## New Jersey Degree Completions Volume

*New Jersey distribution of degree completions from 2012 to 2016*




Source: IPEDS
Note: No Atlantic County institutions reported completions in Digital Literacy related fields.

## Analysis of Findings

**Digital literacy-related bachelor's completions show strong student conferral growth at every geographic level.**

Nationally, fields relevant to digital literacy illustrate strong growth (12.9 percent) and volume (6,013 conferrals as of 2016). Individually, trends across the identified fields suggest the greatest student demand for Digital Communication and Media/Multimedia programs, which reported high volumes of student conferrals and faster than average growth (19.2 percent). However, conferrals from the smaller field of Digital Arts have grown by an even faster 25.1 percent, suggesting this is an emerging field of study.

In the Mid East region, digital literacy-related programs also report above average conferral volume from 2013 to 2016 as well as faster than average annualized growth (21.0 percent). Again, programs in Digital Communication and Media/Multimedia consistently reported the greatest completion volumes over the five-year period, but again, growth was fastest across Digital Arts programs at 29.5 percent per year.

Similarly, New Jersey programs exhibited faster than average growth across the combined fields (92.3 percent). Nearly all of this growth was driven by Web Page, Digital/Multimedia and Information Resources Design conferrals, which rose from 3 to 27 completions resulting in a growth rate of 73.2 percent. Very few completions were reported in either Digital Communication or Digital Arts, though both fields did report year on year growth.

**Notably, nearly 22 percent of student completions were from programs with distance options as of 2016.**

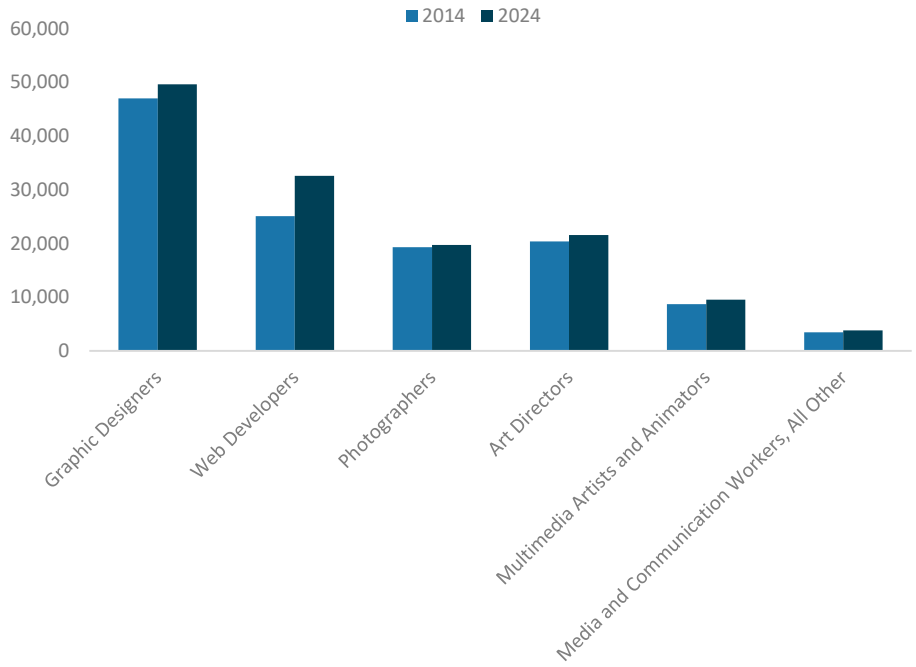
At the national level, digital literacy-related programs with online or hybrid options conferred 1,067 bachelor's degrees in 2016, compared to 4,946 degrees from programs without distance options. Five-year patterns suggest comparable growth rates across on-campus and distance option programs. Should Stockton develop programs in Digital Literacy, it might consider offering an online or hybrid option in addition to its on-campus offering.

# Labor Market Analysis

*BA in Digital Literacy*

## Mid East Current/Projected Job Availability

*Mid East digital literacy-related positions as of 2014 and 2024 (projected)*




## Total Labor Market

*Aggregate digital literacy-related job availability by geographic level*

| | New Jersey | Mid East | National |
|---|---|---|---|
| Baseline Year Employment | 15,770 | 123,910 | 773,400 |
| 10-Year Projected Employment | 16,220 | 136,940 | 814,900 |
| **Growth Rate** | **2.9%** | **10.5%** | **5.4%** |
| **Total Annual Openings** | **400** | **3,860** | **68,600** |

Source: Projections Central and JobsEQ

## Analysis of Findings

**At the national, regional, and state levels, occupational projections demonstrate positive labor market demand from graduates of the proposed digital literacy program.**

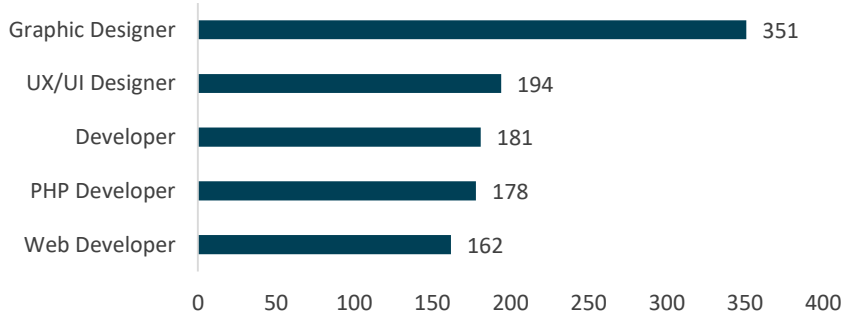
Indeed, 10-year trends across relevant occupations at the regional level show above average projected volumes of job openings and about average growth (10.5 percent), compared to the 10.3 percent average growth rate across all occupations in the region. State and national occupational projections also point to a large number of job openings for digital literacy professionals with 400 annual openings anticipated for New Jersey and 3,860 openings across the Mid East Region.

**Demand is particularly strong for Web Developers in the Mid East and New Jersey, while Graphic Designers can expect the largest number of job openings.**

Across the state, job openings for web developers are expected to grow by over 20 percent, compared to the 6.6 percent growth projected across all occupations in New Jersey. Meanwhile, Graphic Designers are expected to add the largest number of jobs in the region and currently have a large number of job postings available in New Jersey. However, future jobs growth for graphic designers is below average at both levels.

## Top Job Titles in New Jersey

*Across 9,293 total job postings*




## Methodology Note

State and region occupational employment projections correspond to 2014 to 2024 projections. National projections correspond to 2016 to 2026.

## Competitor Analysis

*Based on an analysis of regional competitors, Hanover concludes the following:*

**The proposed digital literacy program would face a limited competitive landscape in New Jersey.**

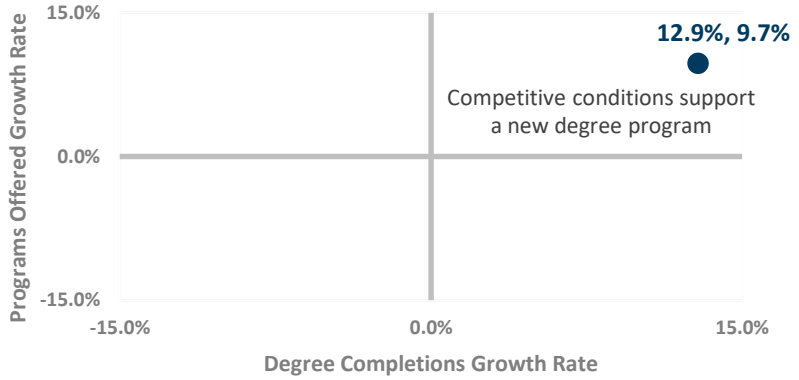
Stockton would compete with 425 similar programs at the national level and 75 in the Mid East, but only four in New Jersey. Furthermore, no Atlantic County institutions currently report bachelor's degree completions in Digital Literacy.

**As of 2016, no New Jersey institution reported a program with a distance option, but Stockton may compete with 75 similar programs nationally.**

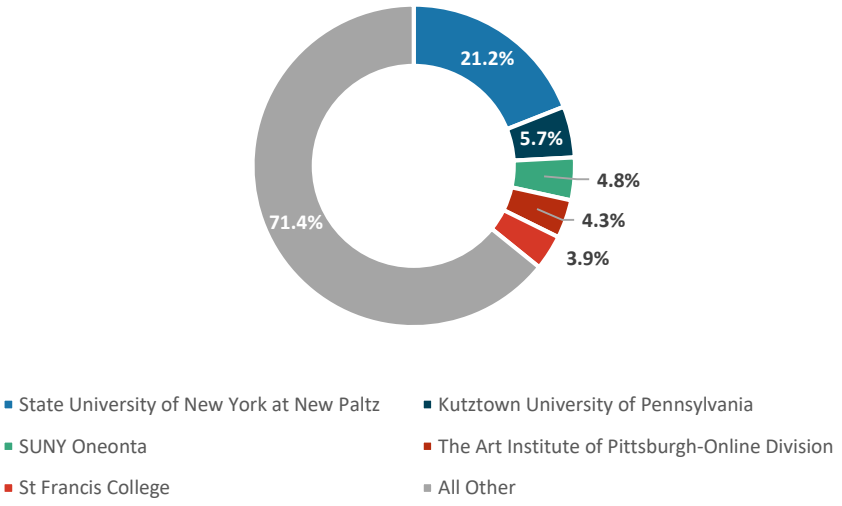
At the national level, programs with distance options rose from 41 to 75 total programs from 2012 to 2016, resulting in a strong growth rate of 16.3 percent. These distance option programs represented nearly 18 percent of all digital literacy programs in 2016, the latter which grew by only 9.7 percent over the five-year range.

## National Market Saturation (2012-2016)

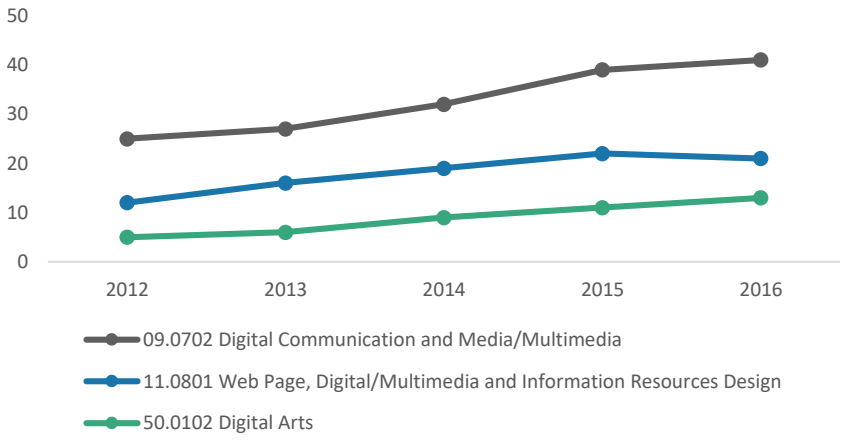
*Nationally, do competitive conditions support an additional digital literacy program?*




## Top 5 Largest Competitors in the Mid East




## Mid East Volume of Programs (2012-2016)




Source: IPEDS
Note: No Atlantic County institutions reported completions under relevant fields.

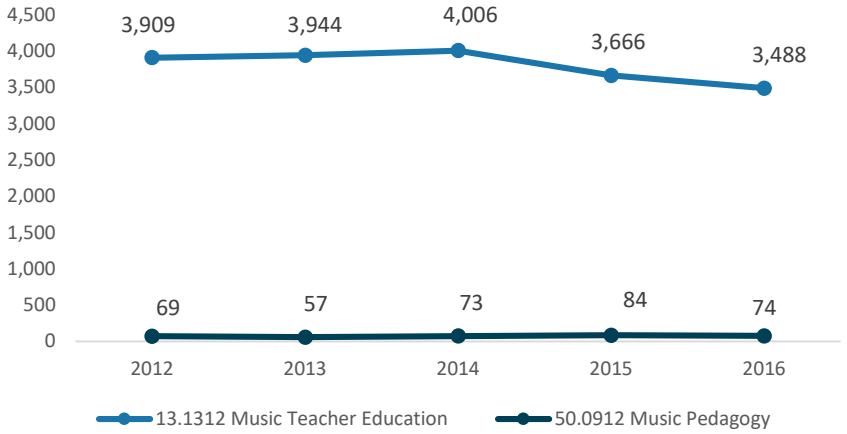
# BA IN MUSIC EDUCATION

# Degree Completions Analysis

*BA in Music Education*

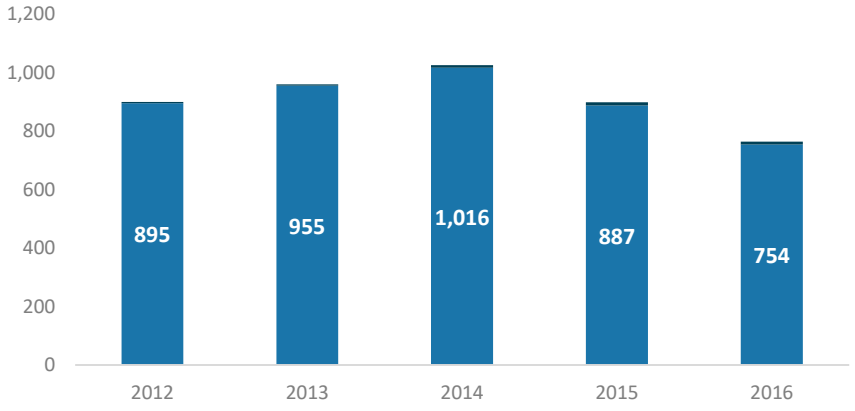
## National Degree Completions Volume

*National distribution of degree completions from 2012 to 2016*




## Mid East Degree Completions Volume

*Mid East distribution of degree completions from 2012 to 2016*




Source: IPEDS

Note: No New Jersey institutions reported completions under Music Pedagogy. No Atlantic County institutions reported completions under any of the relevant fields.

## Analysis of Findings

**Declining student interest in music education programs extends across the national, regional, and state levels.**

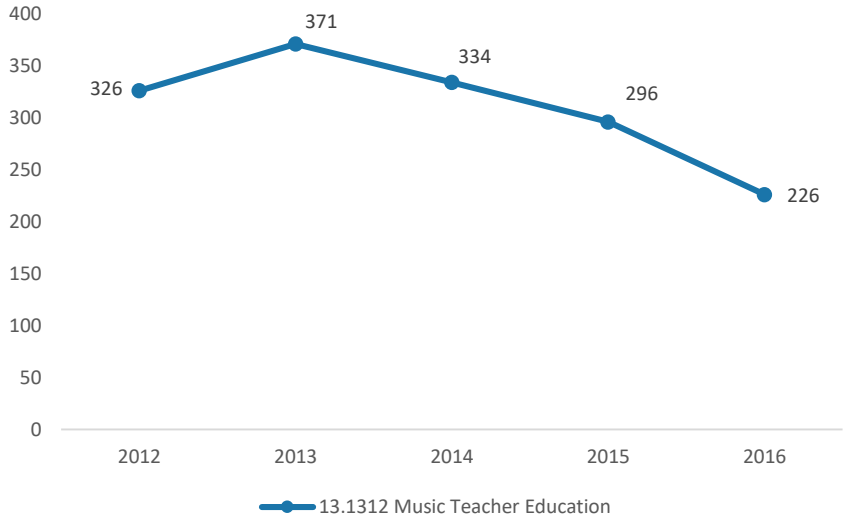
Combined conferrals across Music Teacher Education and Music Pedagogy bachelor's programs *declined* from 2012 to 2016 by rates of 8.8, 4.0, and 2.7 percent per year, respectively. Students in Music Teacher Education programs completed above average volumes of bachelor's degrees as of 2016 at the national, regional, and state levels. However, conferrals from these programs have consistently declined since 2014.

**Two of the three institutions reporting music education programs in New Jersey also report declines in bachelor's degree conferrals.**

Rowan University and Rider University's conferrals in music education *declined* between 2012 and 2016. While, Kean University reports declining bachelor's degree conferrals since 2013.

## New Jersey Degree Completions Volume

*New Jersey distribution of degree completions from 2012 to 2016*

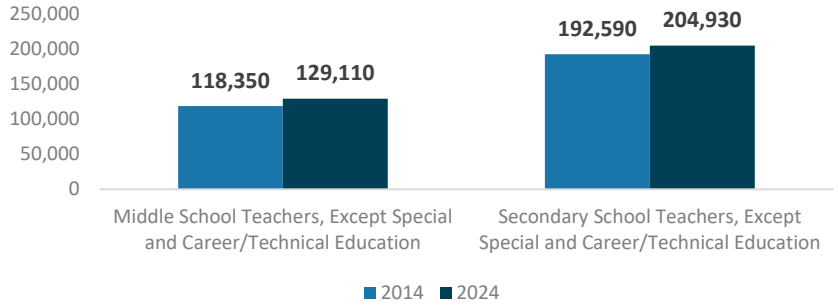


# Labor Market Analysis

*BA in Music Education*

## Mid East Current/Projected Job Availability

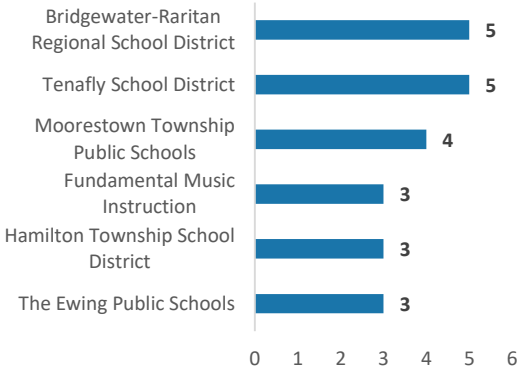
*Mid East music education-related positions as of 2014 and 2024 (projected)*



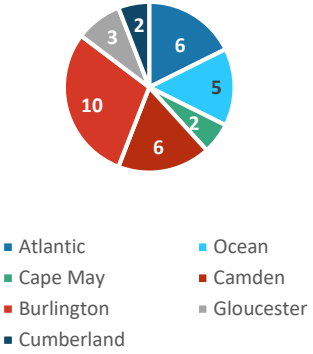

## Music Teacher Job Postings Trends

*In New Jersey and Southern NJ**

**Top NJ Employers**
*(Total – 150 postings)*




**Distribution by County in Southern NJ**
*(Total – 34 postings)*




## Methodology Note

State and region occupational employment projections correspond to 2014 to 2024 projections. National projections correspond to 2016 to 2026. *Job postings reflect "Preschool, Primary, Secondary, and Special Education School Teachers (25-2000)" postings with "Music" in the title in the 180 days leading up to July 12, 2018 in NJ and Southern NJ (Atlantic, Ocean, Cape May, Camden, Burlington, Gloucester, and Cumberland counties; note that Salem employers did not post relevant jobs).

Source: Projections Central and JobsEQ

## Analysis of Findings

**Ten-year labor market projections show a high volume of job openings for middle and secondary school teachers.**

At the state, regional, and national levels, the volume of job openings for middle and secondary school teachers outnumber the average volume across all occupations. However, only national level trends show faster than average growth. The projected growth rate for teachers in New Jersey is particularly weak (1.8 percent growth through 2024). Between February and July 2018, there were 150 total job postings for *music school teachers* specifically in New Jersey, 34 of which were located in Southern New Jersey. Top counties include Burlington (10 job postings), Camden (6), and Atlantic (6).

**However, secondary sources assert that music teachers specifically may face an uncertain labor market outlook.**

The U.S. Department of Education's *Teacher Shortage Areas* has not listed music education as an area of high demand in New Jersey over the last ten years, a trend that may be sustained by funding cuts outlined in the White House's proposed *FY2018 Budget Blueprint*.

**In addition, graduates may compete with a large proportion of master's degree holders.**

The University of Georgetown's Center for Education and the Workforce's *Economic Value of College Major* report finds that art and music teachers account for only 5.1 percent of college graduates in education, of which 42.9 percent have attained a graduate degree. These trends suggest that graduates of the proposed bachelor's program may face competition from peers with high education attainment, who also make an average $61,000 a year compared to bachelor's degree holders' $46,000 per year.

## Total Labor Market

*Aggregate job availability for middle and secondary school teachers by geographic level*

| | New Jersey | Mid East | National |
|---|---|---|---|
| Baseline Year Employment | 60,460 | 310,940 | 1,649,000 |
| 10-Year Projected Employment | 61,560 | 334,040 | 1,773,200 |
| **Growth Rate** | **1.8%** | **7.4%** | **7.5%** |
| **Total Annual Openings** | **1,510** | **9,630** | **130,000** |

## Competitor Analysis

*Based on an analysis of regional competitors, Hanover concludes the following:*

**Stockton will face a competitive landscape should it develop the proposed bachelor's in music education.**

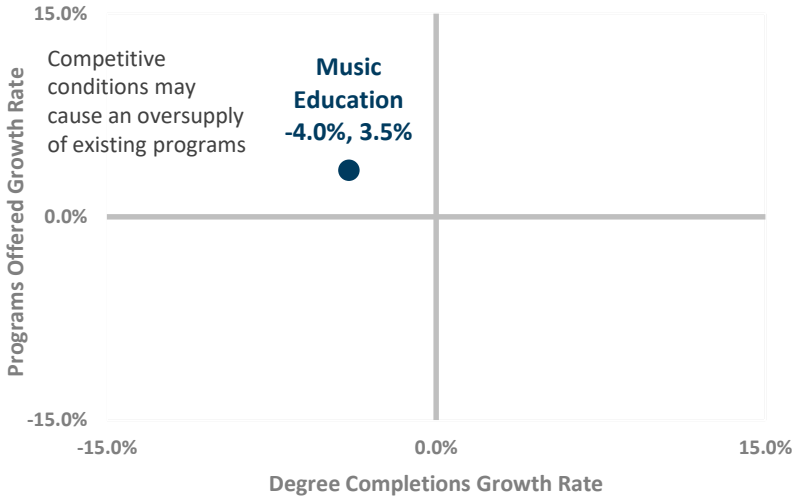
As of 2016, national higher education institutions reported 199 music education-related programs, regional institutions 40 programs, and state institutions 3 programs. Nationally, these programs have grown by 0.8 percent and in the Mid East by 3.5 percent. However, from 2015 to 2016, the number of music education-related bachelor's programs *declined* at each geographic level. Note that no Atlantic County institutions reported relevant programs, but nearby Rowan University has the largest music education program in the entire Mid East Region.

**Considering conferral volume and growth, other major competitors in the Mid East include Ithaca College, University of Delaware, and Pennsylvania State University.**

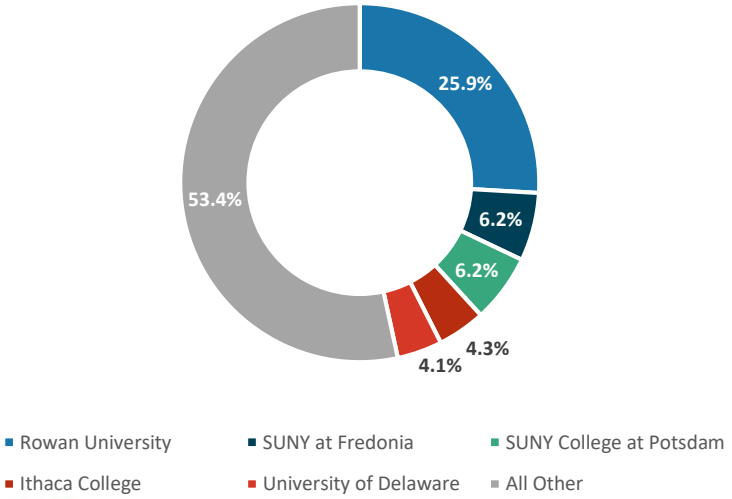
These institutions reported the strongest conferral growth from 2012 to 2016 (2.4 percent, 6.6 percent, and 5.3 percent, respectively) in music teacher education.

## Mid East Market Saturation (2012-2016)

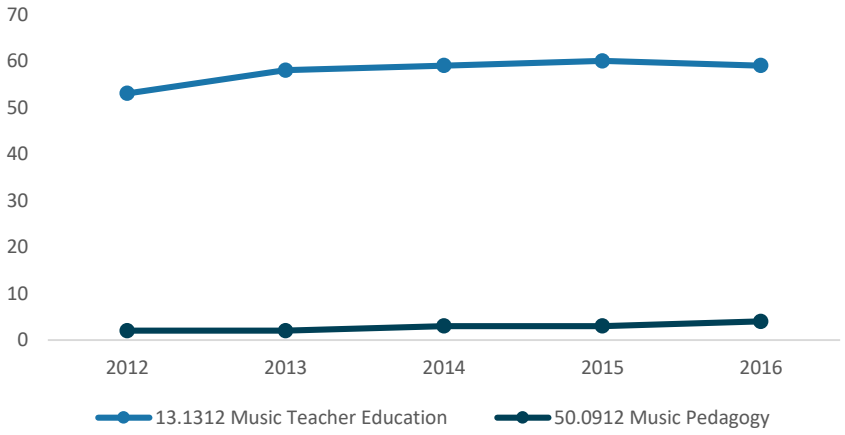
*Within the Mid East do competitive conditions support an additional music education program?*




## Top 5 Largest Competitors in the Mid East




## Mid East Volume of Programs (2012-2016)




Source: IPEDS
Note: No Atlantic County institutions reported completions under relevant fields.

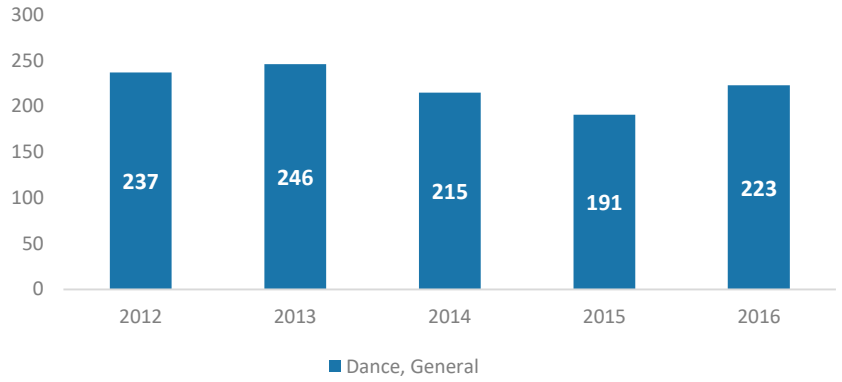
# MFA IN DANCE

# Degree Completions Analysis

*MFA in Dance*

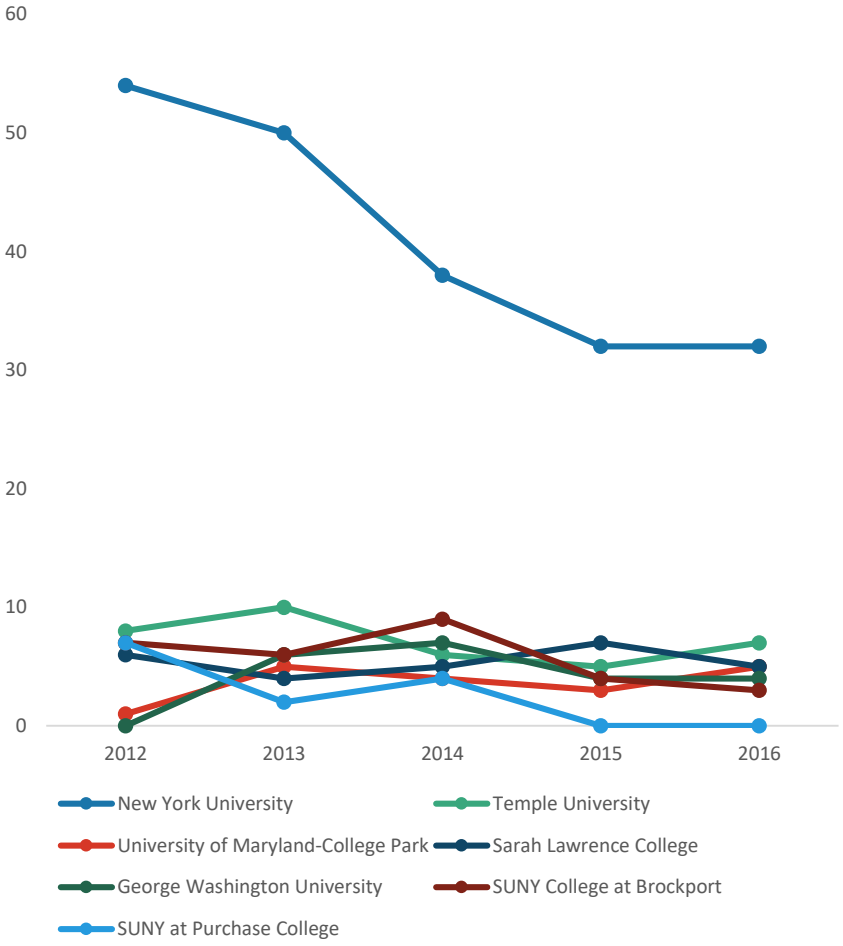
## National Degree Completions Volume

*National distribution of degree completions from 2012 to 2016*




## Mid East Degree Completions Volume by Institution

*Mid East distribution of degree completions by institution from 2012 to 2016*




Source: IPEDS

Note: No New Jersey institutions reported completions under Dance, General.

## Analysis of Findings

**In 2016, Mid East colleges and universities conferred more master's degrees in dance than any other region, but student interest has fluctuated over the past five years.**

Nationally, dance programs at the master's level conferred just 223 degrees in 2016. Additionally, student conferrals *declined* at a rate of 1.5 percent per year across the United States. At the regional level, Mid East institutions conferred the greatest number of degrees (56 total in 2016), but completions *decreased* at an even faster annualized rate of 9.4 percent from 2012 to 2016.

**Similarly, institutional-level trends show diminishing student demand.**

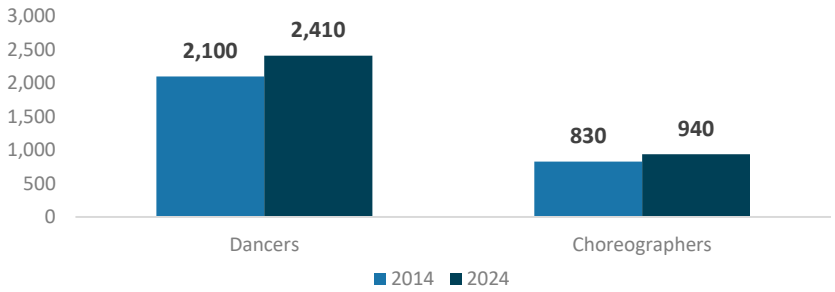
Five of the seven regional institutions that reported conferrals over the five-year range reported declining master's degree completions in dance. Only University of Maryland reported increasing conferrals, but student volume is still low. No higher education institutions in New Jersey reported master's degree completions in dance, though programs are reported in nearby Philadelphia and New York City.

# Labor Market Analysis

*MFA in Dance*

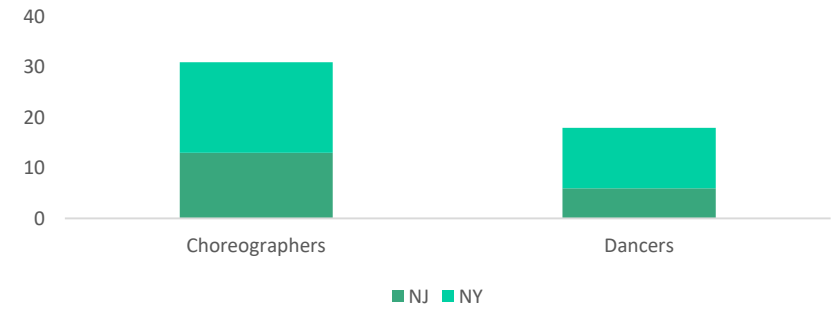
## Mid East Current/Projected Job Availability

*Mid East dance-related positions as of 2014 and 2024 (projected)*




## Job Postings Trends

*Across 19 total job postings in New Jersey and 30 in New York*




## Total Labor Market

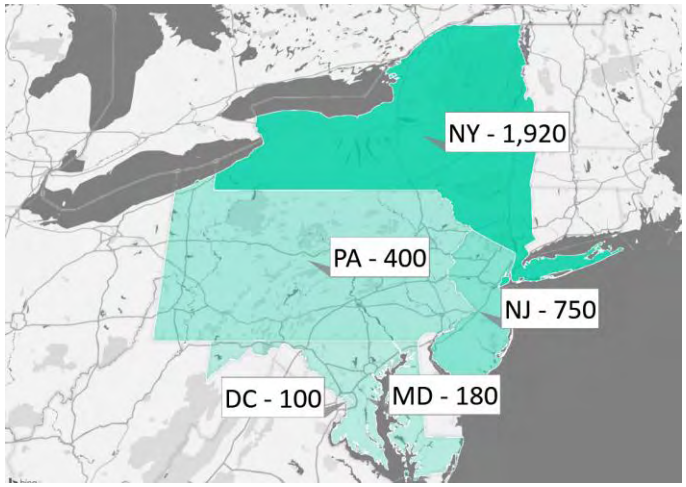
*Aggregate dance-related job availability by geographic level*

| | New Jersey | Mid East | National |
|---|---|---|---|
| Baseline Year Employment | 700 | 2,930 | 20,400 |
| 10-Year Projected Employment | 750 | 3,350 | 21,200 |
| **Growth Rate** | **7.1%** | **14.3%** | **3.9%** |
| **Total Annual Openings** | **30** | **140** | **0** |

Source: Projections Central and JobsEQ

## Mid East Projected Job Availability by State

*Mid East dance-related positions by state as of 2024 (projected)*




## Analysis of Findings

**Dancer and choreographer employment is increasing in New Jersey but concentrated in New York.**

The number of Dancers in the Mid East is projected to increase from 2,100 in 2014 to 2,400 in 2024, and the number of Choreographers from 830 to 940 over the same range. New York will employ nearly 60 percent of these professionals, followed by New Jersey (22.4 percent).

Job posting trends reiterate these findings with 30 New York job postings seeking choreographers and dancers over the past six months, compared to 19 in New Jersey.

## Methodology Note

State and region occupational employment projections correspond to 2014 to 2024 projections. National projections correspond to 2016 to 2026. Note that Delaware did not provide occupational projections data for Dancers nor for Choreographers.

## Competitor Analysis

*Based on an analysis of regional competitors, Hanover concludes the following:*

**Nationally, only 44 institutions reported master's programs in dance in 2016 but very few show positive student demand indicators.**

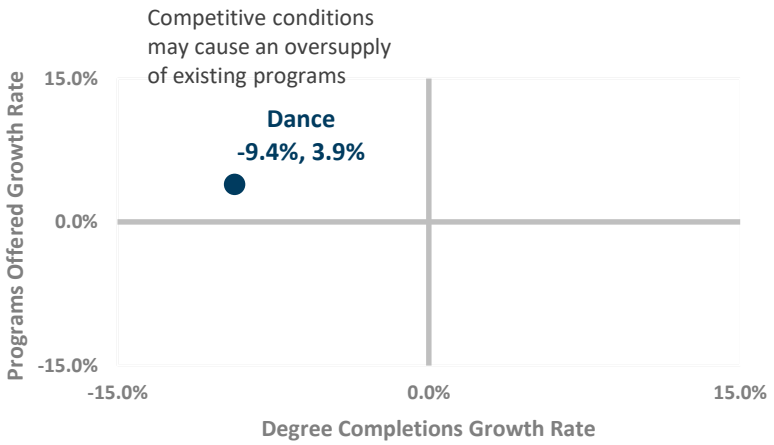
Of these 44 programs, only 11 reported growing student conferrals from 2012 to 2016. Three of these programs are located in the Southeast and Southwest each, two in the Great Lakes, and one in the Plains, Rocky Mountains, and Mid East each. No Far West nor New England institutions that reported a dance program also reported increasing student completions over the five-year range. The Mid East also represents a limited number of competitors overall with seven total as of 2016. However, only University of Maryland's program has grown over the five-year period.

**While no New Jersey institutions reported master's degrees in dance between 2012 and 2016, two new programs have launched within the past three years.**

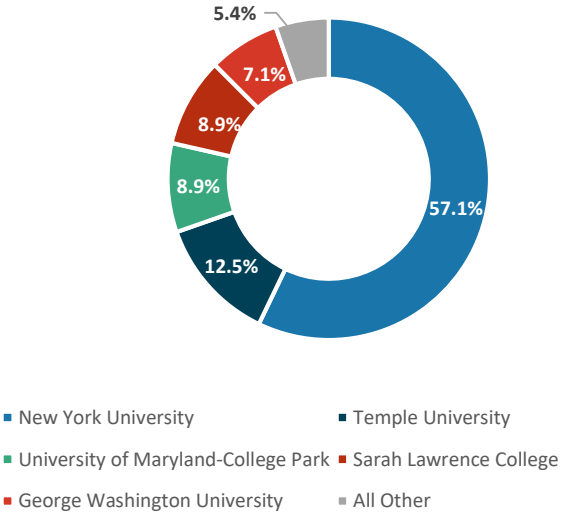
These include Rutgers University's MFA in Dance and Montclair State University's Low-Residency MFA in Dance. Given declining student conferrals regionally and nationally, the market is likely too saturated to support a new program.

## Mid East Market Saturation (2012-2016)

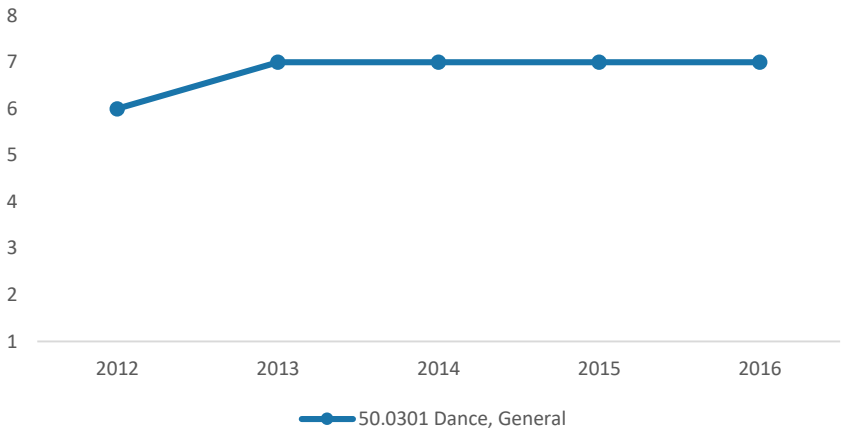
*Within the Mid East do competitive conditions support an additional dance program?*




## Top 5 Largest Competitors in the Mid East




## Mid East Volume of Programs (2012-2016)




Source: IPEDS
Note: No Atlantic County institutions reported completions under relevant fields.

# APPENDIX

## Student Demand Methodology

Hanover uses the most recent five years of completions data (2012-2016) from the National Center for Education Statistics (NCES) to estimate student demand for specific degree programs. The NCES uses a taxonomic system of numeric codes to classify postsecondary academic programs, known as the Classification of Instructional Programs (CIP) system. Definitions for each CIP code can be found on the NCES' **CIP user site**. All award conferral data presented in this report were drawn from the NCES's **Integrated Postsecondary Education Data Center** (IPEDS). **Note:** When interpreting completions data, some considerations should be taken into account:

- Institutions classify their programs independently, meaning that two programs that share identical content could hypothetically be classified under different CIP codes. In addition, it cannot be assumed that IPEDS completions reported under an individual CIP code always correspond directly to an individual program at an institution.
- Newer programs may be excluded from completions data, as these programs have yet to graduate students.

**Classification Thresholds for Degree Programs by Geographic Level**

| Geographic Level | Degree Level | Ave. Volume ('16) | Ave. Annual Growth |
|---|---|---|---|
| National | BA | 1,808 | 1.7% |
| | MA | 744 | 1.0% |
| Mid East | BA | 414 | 1.4% |
| | MA | 197 | 0.9% |
| New Jersey | BA | 143 | 1.5% |
| | MA | 57 | 2.3% |
| Atlantic County | BA | 65 | 2.4% |
| | MA | 20 | 12.1% |

## Labor Market Demand Methodology

To analyze the employment outlook for graduates with education in the academic fields of interest, Hanover examines labor projections, which align with six-digit occupations as defined by the **Bureau of Labor Statistics** (BLS) Standard Occupational Code (SOC) system. The SOC system is analogous to the CIP system, and the two are connected by the CIP-SOC crosswalk. The CIP-SOC crosswalk maps individual six-digit CIP codes to six-digit SOC codes. Hanover uses the CIP-SOC crosswalk to select occupations related to relevant CIP codes. Cross-walked codes are supplemented by occupations selected by Hanover as potentially relevant. Hanover selected occupations typically requiring at least a bachelor's degree unless otherwise indicated. **Note:** When interpreting labor data from BLS and **Projections Central** (a repository for state-level data) some considerations should be taken into account:

- SOC categories may be broad, and include a number of unrelated positions; as such, some projections may overestimate demand related to specific fields.
- The CIP-SOC Crosswalk may not identify all SOC codes potentially related to the degree topic or field.

**Classification Thresholds for Occupations by Geographic Level**

| Geographic Level | All Occupations | |
|---|---|---|
| | Ave. Volume ('24) | Ave. Growth ('14-'24) |
| National | 204,616 | 7.4% |
| Mid East | 36,037 | 11.5% |
| New Jersey | 6,103 | 6.6% |

For this analysis, Hanover retrieved job postings data from **JobsEQ**, a proprietary database providing real-time job postings aggregated from thousands of websites. All data reflect the 180-day period ending March 14, 2018.

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