

Proposed MSc in Sports Coaching & Performance

Market assessment, January 2014

Demand

A demand survey has been live for approx. 12 months. To date, the survey has had 261 respondents in total, 210 of which have said they would be 'very interested' in studying either an online MSc, PgDip, PgCert or stand-alone course in sports coaching. This is encouraging.

Of the 210 'very interested' respondents, 68 (32%) found out about the programme organically i.e. stumbled across it on the internet, via a search engine or on the University website.

For demand surveys, we use organic demand as the strongest indicator of demand. Demand surveys are only an indicator of demand and there is a big difference between someone saying yes to a survey and then actually applying and matriculating as a student. Organic demand is at least demand from people who are proactively searching for study in this area rather than people prompted to complete the survey.

The number of organic, 'very interested' respondents, therefore, equates to just below 6 per month. This is encouraging, especially as the figure is higher than when the programme proposal documentation was originally drawn up and is more in line with the University average where we see approx. 6-7 organic and 'very interested' responses per month for demand surveys conducted across the University.

However, a number of factors should be considered:

- The survey asked 'Is there anything that would prevent you from studying Sports Coaching online at the University of Edinburgh?'. 78 (37%) of the total 210 'very interested' respondents answered this question and 83% stated 'financial restrictions' – approx. 50% of this 83% were from the UK. 29 (43%) of the 68 'very interested' and organic respondents also stated financial restrictions could prevent them from studying the programme. This should be considered within the context of the funding challenges discussed below. It should also be noted that the stated fee for the MSc in the survey was £8,280, slightly lower than the now proposed MSc fee of £8,850.
- 43% of the total 'very interested' respondents to this survey found out about the programme through an email from the University or another organisation and as such, those respondents have been prompted to complete the survey which introduces an element of bias. This 43% are, therefore, not included in the organic demand noted above.

Please note, demand survey responses are only an indicator of demand. The number of 'very interested' responses is unlikely, in any survey, to equate to a comparable number of applications.

Competitive position in the marketplace

A competitor analysis was undertaken by the programme director.

From this research, it would appear that the only competitor in the UK and globally in terms of mode of delivery is the University of Queensland – most competitors included in the programme director's analysis are either delivering the programme solely on-campus or via blended learning. This is

encouraging in terms of having a unique proposition but the absence of any comparable programmes should be investigated further, if possible. Why have other universities not decided to offer an online masters programme in this area? Why has no US university offered a comparable programme, either online or on campus? Are there any competitors missing from the current analysis that could be included?

Based on the existing competitor analysis, it is potentially encouraging that within the UK marketplace, our tuition fee will be lower than other UK competitors for international students. Our fee for Home/EU students, however, is higher and potentially poses a threat to the recruitment of Home/EU students.

It is not clear from the existing competitor analysis how established the programmes examined are. However, based on the current analysis, no programme is recruiting the 30 students that we are forecasting to recruit within 5 years. Our ability to recruit higher student numbers may be facilitated by the online mode of delivery but caution should be exercised when forecasting student numbers.

The analysis of the University of Queensland also points to an element of accreditation that they offer to Australian graduates. Further exploration would be useful to determine whether this accreditation is something that Australian students would want and whether we would be able to provide it.

Overall, whilst the competitor analysis is a useful introduction to the marketplace, a more comprehensive analysis should be undertaken, in line with the other analyses that have been done by the School Marketing Officer, that includes other competitors and which analyses additional categories of information e.g. key messages used by competitors, accreditation achieved, funding available.

Potential threats to UK student recruitment

As acknowledged in the programme proposal documentation, the scope to attract Home students may be limited given the fact that the UK coaching workforce tends to be volunteer or part-time. Although UK coaches may be working in a related area, it is not clear whether their employers would pay for someone to undertake a masters programme if it does not directly relate to their job. Students could self-fund but the extent to which they are prepared to do so for something they do on a voluntary basis may be limited.

The financial restrictions for UK students highlighted in the demand survey may also represent a considerable threat, especially in light of an increasingly difficult funding climate at present for UK students to undertake postgraduate study across the sector.

Finally, across the University, we actually see a significant proportion of online learners coming from the UK. Our online students are, at present, often much less international than some of our on-campus programmes. Of our 1,750 online students at present, 750 (43%) are international. As such, the importance of the Home market and if/how they can be attracted should be considered.

Potential threats to EU and International student recruitment

Given the threats to UK recruitment, the programme proposal highlights the fact that the landscape in the UK for sports coaching is very different from elsewhere in the world, for example, Europe,

North America and Australia. As such, the programme has been designed for a global market, where a much more professional framework for sports coaching, professional development and performance management exists.

The reliance on global demand, however, may be threatened by a number of factors:

Funding

Failure to secure funding is the second most cited reason for declining a place for postgraduate study at the University in the annual decliners' survey (second to preferring a degree at another University). This should be considered in light of the financial constraints issue highlighted in the demand survey.

In addition, reliance on North American students should be considered carefully. Whilst postgraduate tuition fees generally at Edinburgh are often lower than postgraduate study in the USA, it is important to note that US students are not eligible for federal loans for online study. A significant proportion of the University's US students do have funding (either federal or private) for their postgraduate taught study at Edinburgh. Given federal funding will not be possible, further exploratory work should be undertaken to determine the scope for private funding.

Finally, for EU students, as with Home students, our proposed fee is higher than EU fees for many of the UK competitors cited in the existing competitor report.

Profile

1. It is important to consider the challenge of reaching a North American audience. Experience of the CHSS Marketing Team is that advertising on-campus and online programmes to an American audience is challenging given the size of population and the larger budgets that US universities have for advertising (sometimes millions of dollars). If the programme aims to recruit the majority of its students from the USA, a marketing budget of no less than £5000 will be required for year 1 and again in year 2.
2. 14% of our current international online students come from Australia and for online programmes, it is one of our top 3 international markets – this is encouraging. As a whole, however, Australia is not one of the University's primary international markets and demand survey respondents from Australia were limited (only 16 of the total 261 respondents). This highlights our limited profile at present and the risk of relying heavily on this market in the early years. In the longer term, there may be scope for this market to become more established for this programme.

Sustainability

The number of full-time sport coaches highlighted in the programme proposal (217,000 in USA and 27,9000 in Australia) may be quite static if those governments are not investing in sports coaching. If that's the case, then we need to consider the longer term sustainability of the programme in our forecasted numbers.

Recommendations

1. Forecasting - Some reconsideration of the student numbers forecasted may be helpful. At present, we are projecting 30 students within 5 years which should be considered in light of threats highlighted above and the fact that a number of areas in the College are seeing declining postgraduate application numbers at present. A breakdown of the home and

international students in the forecasting would also be helpful to focus the marketing activity.

Finally, reconsideration of the proportion of full and part time on-programme students may be useful – at present, we are forecasting that each year, half the cohort will be full time which would be contrary to many online programmes at the University where we often see students studying part time to work around existing personal or work commitments.

2. Competitor analysis – a more comprehensive competitor analysis could be undertaken to evaluate the extent of competition in the USA and Australia and particularly, the accreditation requirements in those countries to determine whether a UK MSc would benefit international students.
3. Sustainability – evidence (eg government white papers and policies) to demonstrate the UK government's investment in sports coaching would further help to support the proposal for this programme in light of the threats to international recruitment. Similar evidence from international markets would also be useful.
4. Global demand – the programme proposal documentation comments that within the USA (2013), the greatest challenge within coach education has been the voracious appetite for online learning and that Australian sources comment that in the past two years, the demand for digital learning has grown by 56%. Clarification of the extent of study highlighted in these sources (i.e. whether the demand is for postgraduate study or lower) would be useful to support the programme proposal further.
5. Funding – the programme director's initial conversations with sports coaching bodies in the UK and internationally could be followed up to assess the extent of the threat posed by financial constraints highlighted above and particularly to determine sources of funding for students to study this programme.
6. Budget – as highlighted above, a budget of at least £5000 for year 1 and again for year 2 would be required to ensure success of this programme.
7. Marketing messages – further consideration of the programme's unique selling points, beyond its delivery method, would help to support the case for this programme. There are a number of competing and cheaper programmes available in the UK to Home/EU students so strong positioning of our programme would be important for Home/EU as well as international students.
8. Timescales – it would be strongly advisable to have a decent lead-in time for the promotion of this programme. If aiming for September 2015 start, the programme should be validated by no later than December 2013, and ideally a full academic year in advance of the start date.