GAP YEAR
ASSOCIATION

**Annual State of the Field
Program Provider and
Gap Year Counselor
Report
2021**

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A special thanks is extended to the Gap Year Association Research Committee whose continued support to improving data in the gap year field has made this report possible.

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Preface

The State of the Field Survey functions as a snapshot of the current trends in gap year education, particularly within the United States of America. This survey has been conducted internally by the Gap Year Association (GYA) since 2012. Prior to 2012, data of a similar nature was being collected from 2006-2011 under the guidance of the USA Gap Year Fairs. Since 2019, the survey has been formalized under the direction of the GYA Research Committee, with an accompanying executive report being published each year.

The GYA Research Committee is a group of volunteers who are committed to the advancement of active and ongoing research agendas in the gap year field. The committee meets on a quarterly basis to discuss research, hear from current gap year researchers, maintain an exhaustive digital library of gap year-related research, and conduct their own projects. The annual State of the Field survey is a significant contribution to this overall agenda.

While certain questions are continually asked each year in the survey, the committee adjusts the survey each year to expand the knowledge of the gap year field and to address contemporary issues, concerns, and curiosities. Surveys are distributed through a database of contacts in the GYA network. The study is also dedicated to maintaining anonymity for all participating organizations.

Since the annual survey changes in format as well as in participation rates from year to year, it is not intended to be used in a comparative or longitudinal manner with previous years' data. Each annual survey serves as a snapshot of the current state of the field and, thus, stands alone in its results as our best attempt to capture what is happening in the gap year industry at this moment.

A Caveat in Regard to Comparing Recent Data from Different Years

As we all know, the COVID-19 pandemic had a dramatic effect on gap year programming, enrollment, and sustainability in the past year. While we know that more students were deferring their enrollment or taking a year off from college last year, typically increasing the number of students requesting a gap year by as much as three-fold at many colleges and universities, that did not necessarily translate into increased interest for many programs. While this did result in increased applications and enrollments in some gap year programs, others ceased to exist entirely or significantly changed their program offerings.

As a result of these changes, the **GYA Research Committee received survey responses from only 34 providers this year, compared to 55 providers last year**. Even responses from GYA member programs dropped from **68%** of our members last year to **28%** this year, a disheartening decline. Included in that decrease were some of the larger gap year programs from the past. For that reason, it is important not to automatically attribute any trends that may seem apparent in a comparison of new data with that from the past to anything but the changes that occurred as a result of the pandemic.

Organization and Program Information

Eligibility and Response Rates
Forty-six providers started the survey. Seven (15%) were disqualified from participating in the survey because they did not meet the eligibility criteria. Another six responses (13%) were removed before analysis either because of duplicate entries or because the provider did not answer any questions beyond the eligibility page.

After cleaning the data, just 34 organizations were included in our analysis. Of these, 30 organizations indicated they were current GYA members. In total, then, our sample represents just 28% of GYA provider members (107). With such low response rates, it is difficult to make strong and meaningful claims about the "state of the field." Moving forward, we hope to make the survey more manageable and useful for providers so that we can increase response rates and provide more accurate data. We invite providers to share feedback on the survey and State of the Field reports.

Response rates vary by question, dropping off considerably after the first page of the survey. Please keep the response rates in mind as you review the study's key findings.

Membership and Accreditation
Nearly all of our respondents were GYA members. Of the thirty-two organizations that provided information on membership status, 30 (94%) indicated they were current members of GYA. One respondent was not a member and one was unsure.
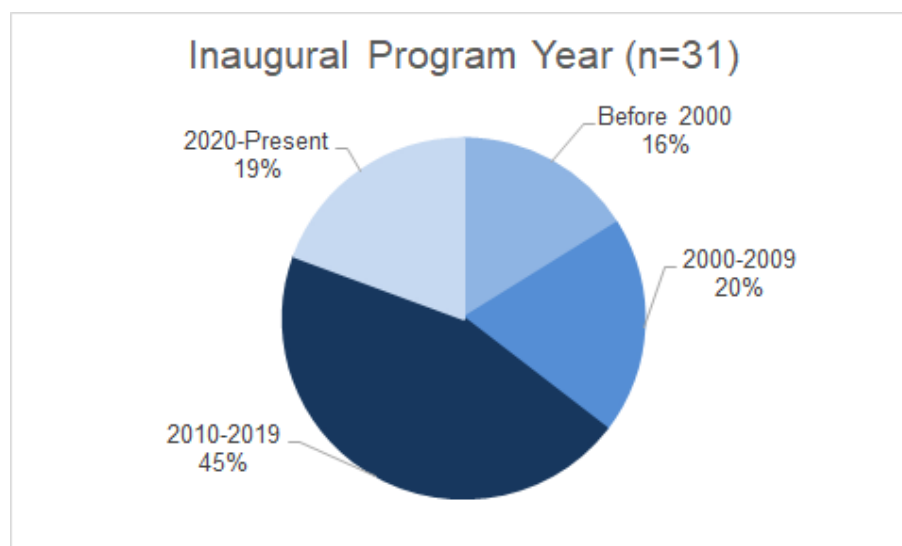
Thirty-three providers provided information on accreditation status. Of these, 13 (39%) were currently accredited and 4 (12%) were in the middle of the accreditation process. The remainder (14, or 42%) were not accredited; Nine (27%), however, expressed

interest in learning more about the accreditation process. Two (6%) respondents were unsure of their accreditation status.
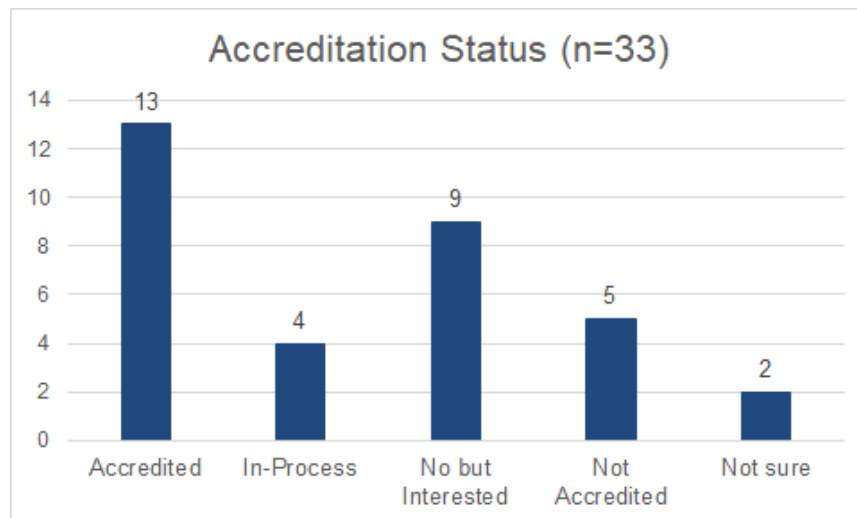
Inaugural Gap Year Program
Thirty-one organizations reported the year of their inaugural gap year program. Nearly two-thirds of organizations (20 total, or 65%) responding to the survey ran their first eligible program in or after 2010. Six respondents (19%) ran their first program in 2020.
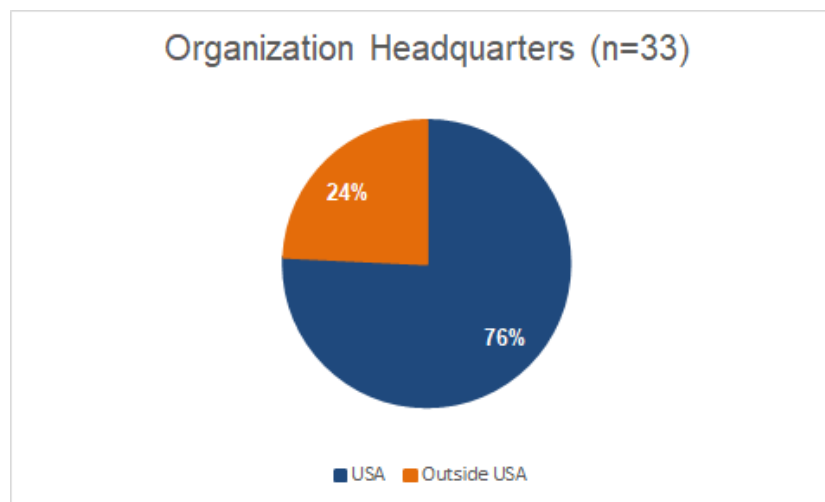

Organization Type
Thirty-three providers reported the type of organization. Of these, the majority (52%) are for-profit providers. The remaining providers identified as not-for-profit (30%),

university-run programs (9%), or benefit corporations (6%). One organization identified as a "social enterprise" organization.

Organizaton Type (n=33)
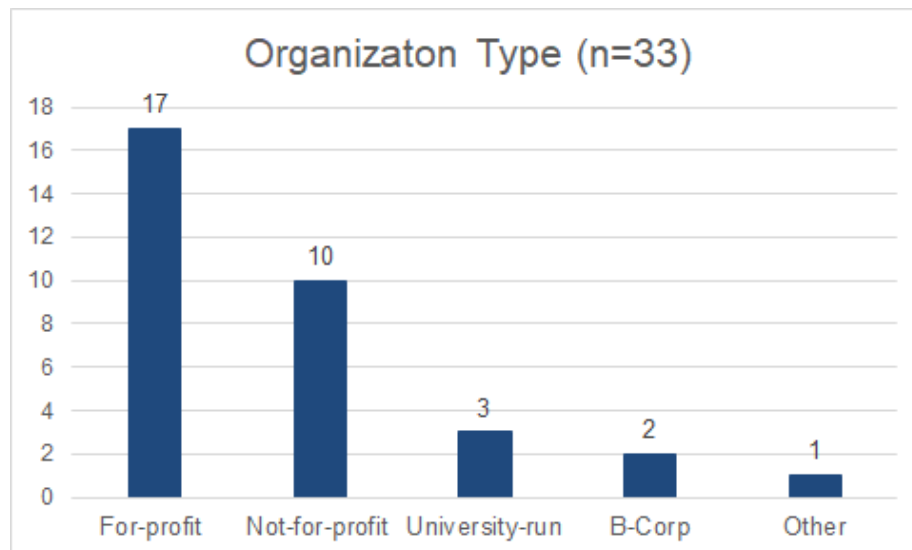
Headquarters

Thirty-three organizations reported their location. Of these, 25 (76%) were located in the USA and 8 (24%) were located outside the USA.[1]

Organization Headquarters (n=33)

College Credit

Thirty-three organizations reported on college credit. Of these, 17 (52%) indicated that they offer college credit on some (4) or all (13) of their programs. The other 16 (48%) do

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[1] We do not disclose the headquarters location of non-USA providers in order to maintain respondent confidentiality.

not offer college credit for their programs; Eight of these organizations, however, indicated that some program participants received college credit for the program through their personal university affiliation.
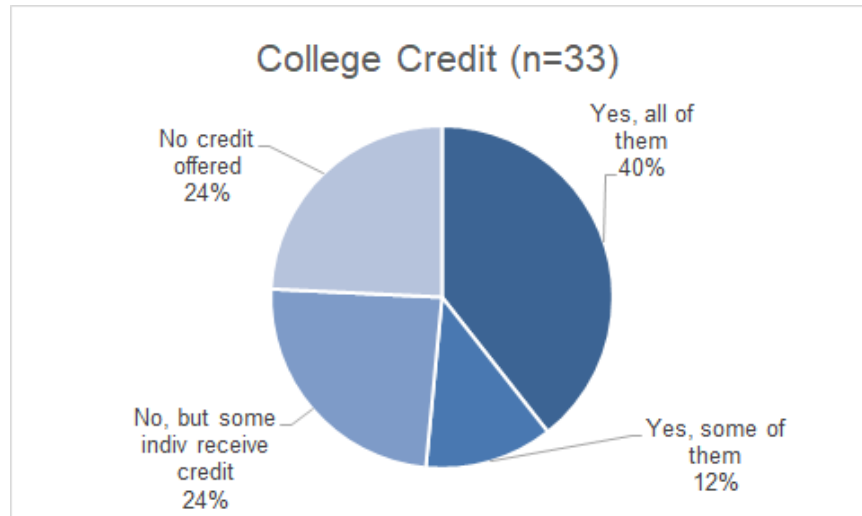
The most prominent partner colleges mentioned by respondents are Portland State University and Western Colorado University.[2]

*Full-Time Staff Size Pre- and Post-COVID*
Full-time staff size was reported by 30 providers. Pre-COVID, the average staff size was 38 with a range of 1 to 800. The average staff size at the time of the survey (i.e., "at present") was 22 with a range of 0 to 400.

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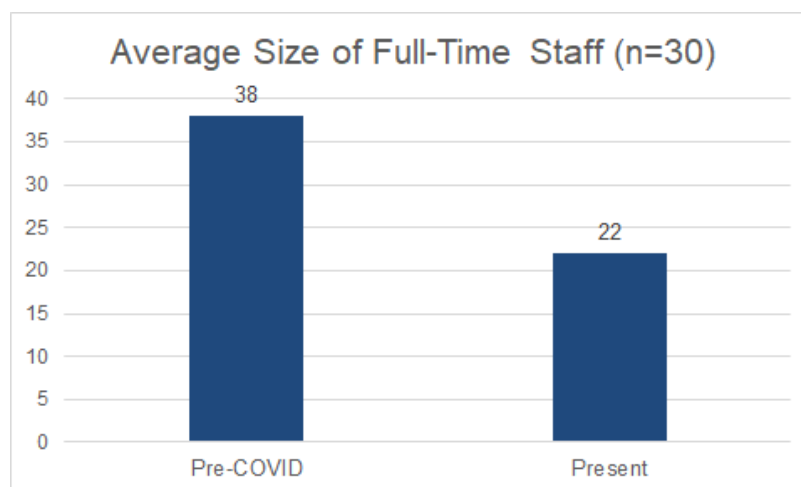
[2] All other partner colleges were mentioned by only one provider and are not included here to maintain respondent confidentiality.

One large provider, however, skewed the averages considerably. If we remove this one provider, the average full-time staff among the remaining providers is 11 pre-COVID and 9 at the time of survey, indicating an 18% reduction in average full-time staff size.

Only twenty-nine respondents reported information on the size of their full-time staff pre-COVD <u>and</u> at present. Of these, 15 (52%) reported a smaller staff at present than pre-COVID, 10 (34%) reported the same size staff, and 3 (10%) reported a larger staff at present than pre-COVID. Among those organizations with smaller staff, the average loss in staff was 48% with a range of 11% to 100%.
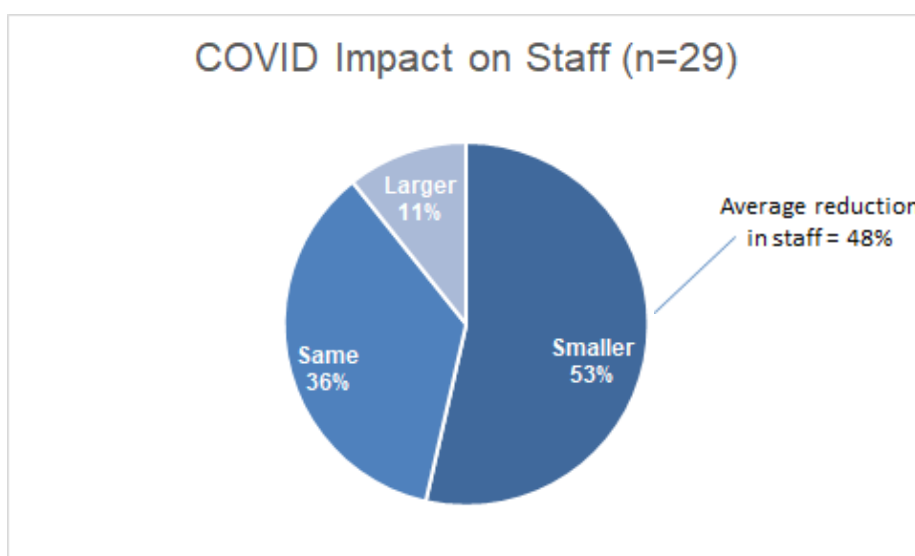

Impacts of COVID-19

COVID-19 Organizational Impact
The impact that COVID-19 has had on organizations ranges from very negative to very positive, showing that the consequences of the pandemic have not been proportional across the industry.   When asked to evaluate the impact of COVID-19 on their organization using a scale of -5 to 5 the average score was -1. Still, for 58% of respondents, the pandemic has had a negative impact, although for 30% of respondents the pandemic had a positive effect, with 11% of respondents saying the impact has been neutral.

Because of COVID-19, providers had to find ways to respond to the immediate financial burden of the pandemic. Of the 29 respondents who reported on this question, 55% had to lay off or furlough staff members, 75% had to cancel or suspend programs, and

17% had to decrease scholarship commitments. However, organizations became creative and tried new ideas to lessen these burdens that may have positive future outcomes. 72% of respondents created new programs, 24% shortened existing programs, 59% implemented more flexible refund policies, 24% increased program insurance, and 21% increased scholarship commitments. Fortunately, no responder needed to claim bankruptcy or discontinue all programming.
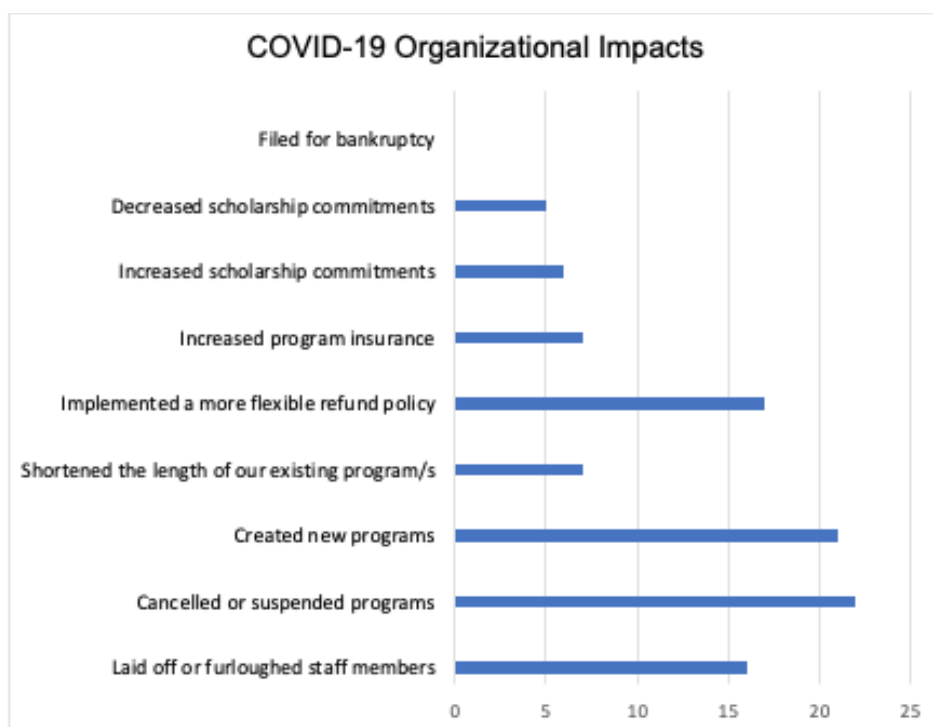

When asked to add additional responses, one respondent noted that they have still not re-hired staff who were laid off, another had to decrease staff benefits such as matching retirement funds and also were forced to go remote.

Gap Year organizations did receive financial support from the government, at least in the United States. 82% of respondents received a loan or grant from the SBA in the form of the Paycheck Protection Program (PPP). 36% of respondents also received additional federal support such as SBA loans, employee retention credits or other programs. Three respondents (13%) also mentioned non-governmental support such as grants and donations.

COVID-19 Program Impact
Gap Year service providers responded to the challenges of COVID-19 by designing and piloting new programs. Of the 31 organizations responding to this question, 42%
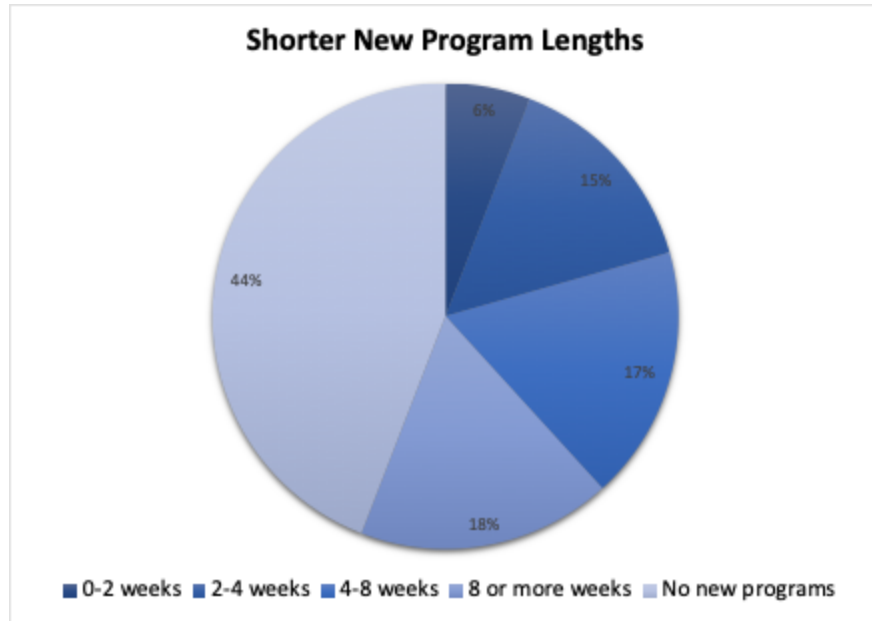
created new domestic programs, 26% created online programs, and 26% created hybrid (online and in-person) programs. Only 19% of organizations did not develop new programs.
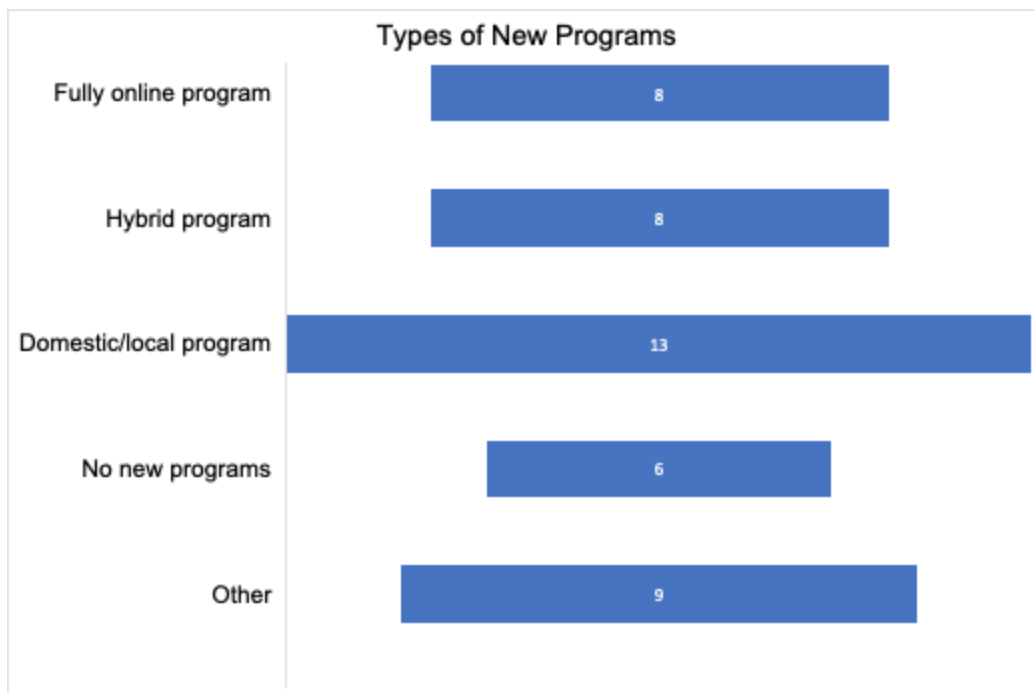
In addition to these new programs, organizations responded that they created pod model programming, created an insulated campus model, held virtual events for students and alumni, created a homeschooling program, or went to single country itineraries.   One new organization was founded just last year as a result of COVID-19.

Of the 27 organizations that did create new programs during this year, 65% of these organizations plan to keep the new programming itineraries or models. An additional 17% will not continue to use these new programs, and 17% are unsure yet if they will keep them.

Nineteen organizations chose to shorten program length in response to COVID-19. 32% of these organizations went to programs between 4-8 weeks, and an additional 32% of these shortened programs were more than eight weeks. Five new programs, 26%, were between 2-4 weeks and only two, 10%, were less than two weeks.

Shorter New Program Lengths

6%
15%
17%
18%
44%

■ 0-2 weeks ■ 2-4 weeks ■ 4-8 weeks ■ 8 or more weeks ■ No new programs

Nine organizations that created shorter programs intend to keep the shorter lengths as options to students moving forward. Only one organization reported that they would not keep the shorter program and three organizations are not yet sure.

There was tremendous variety in locations where new programs were piloted during the past year. The overwhelming majority (48%) of these new programs were in the United States, followed by Latin America (19%), Europe and Africa (9% each), and Asia (4%). There were five "other" locations listed that did not fall into any grouped category.

New Program Locations

Legend: ■USA ■Latin America ■Europe ■Africa ■Asia ■Other
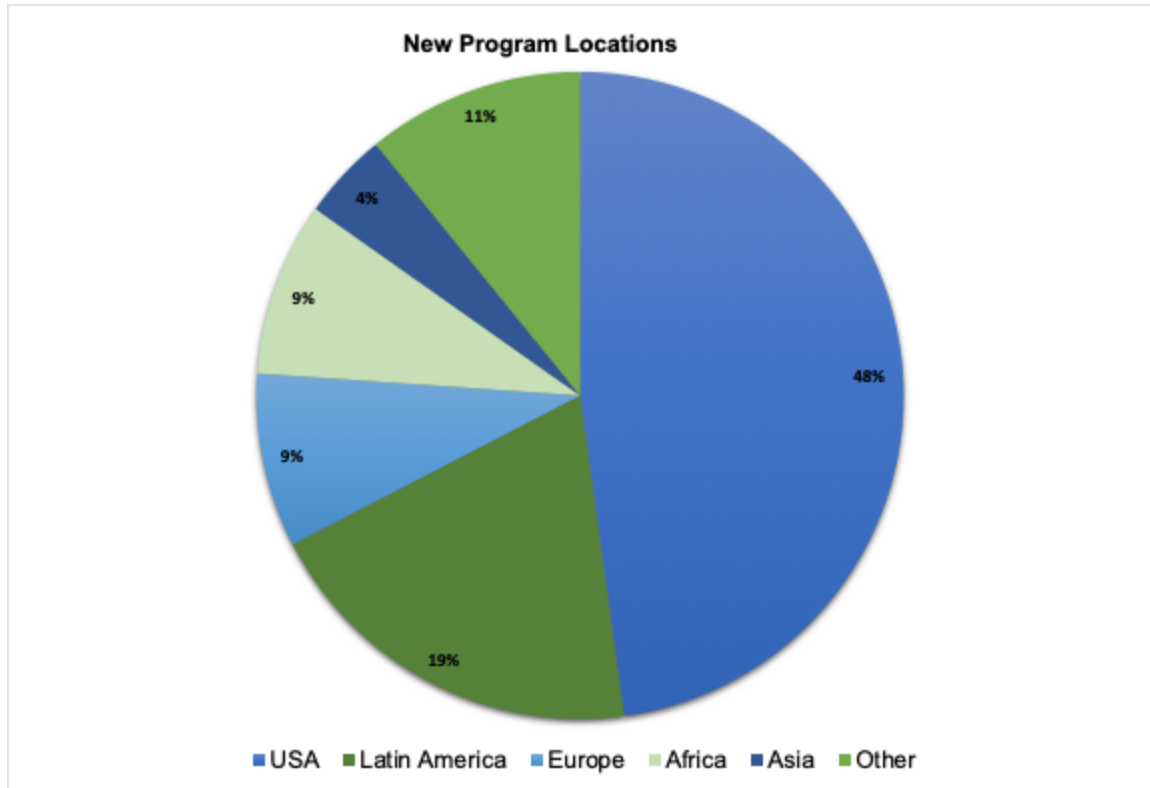
Even within the US programs created, there was tremendous variety. However, the Mountain West (Colorado, Wyoming, Utah, Idaho, Montana and Washington) was the most-mentioned program location. This was followed by the Southwest (Arizona, New Mexico and Texas), the East Coast (Massachusetts, New York, Virginia and Maryland), Hawaii, and the Midwest (Wisconsin).
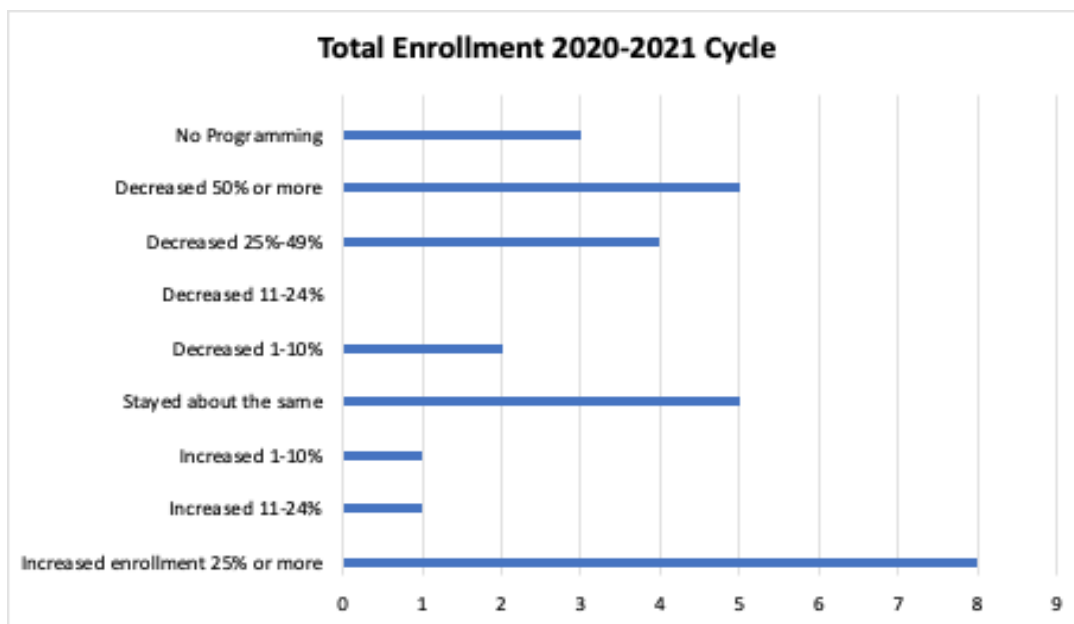

USA New Program Locations
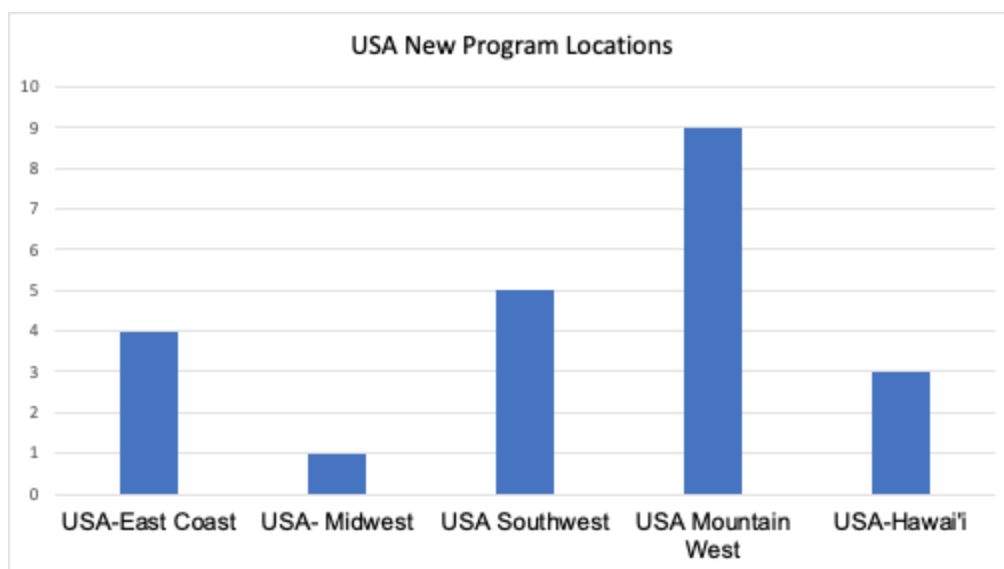
COVID-19 Enrollment Impact

It is fair to say that the COVID-19 had a dramatic impact on the number of applications for programs, but the impact varied widely across the industry. 57% of the 28 respondents reported increases in applications, and half of them reported increases larger than 25%. Only 25% of respondents reported decreases, but half of those reported large decreases of over 50%. Two organizations reported not running any programs or accepting applications.
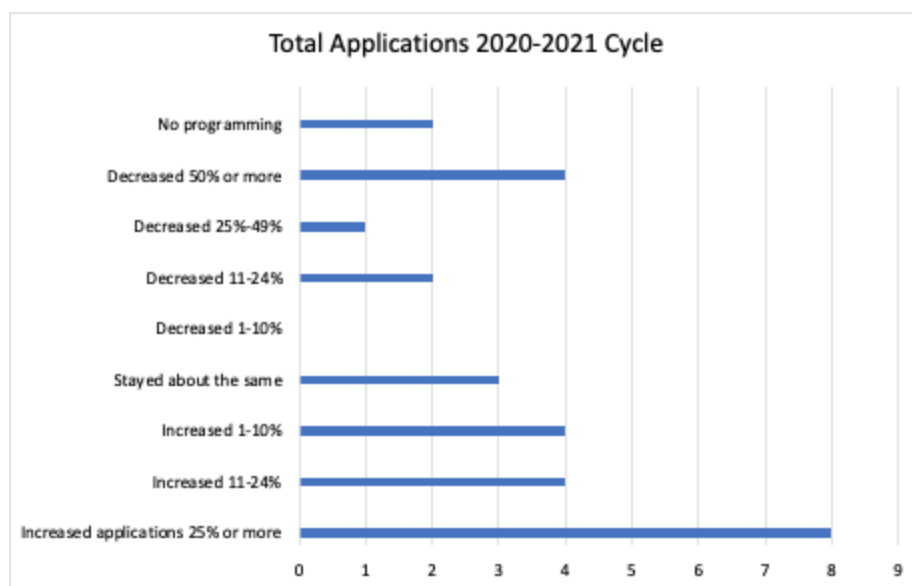
The trend for enrollment also varied widely across the industry, but it appears that not all organizations were able to convert the increased applications into increased enrollment due to the restrictive nature of travel during COVID-19. However, 34% of organizations still saw an increase in total enrollment. 10% saw little change in enrollment. 17% saw little change and 48% saw a decrease.

A deeper analysis into the organizations that showed large increases in enrollment did not find any correlation between the fully-online programs or hybrid programs and increases in applications and enrollment. In fact, only one organization that ran an online program and one program that ran a hybrid program reported more than 25% increases in enrollment.

Total Enrollment 2020-2021 Cycle

Category	Value
No Programming	3
Decreased 50% or more	5
Decreased 25%-49%	4
Decreased 11-24%	0
Decreased 1-10%	2
Stayed about the same	5
Increased 1-10%	1
Increased 11-24%	1
Increased enrollment 25% or more	8

In general, the organizations that reported the increases in applications also reported similar increases in enrollment. However, the increase in applications is greater than the increase in enrollment. It is possible that more students in this 2020-2021 cycle applied to multiple programs so as to have a back-up if a program was canceled. Changes in refund policies could also have caused changes in organizational yield rates during this cycle, but data was not collected on this topic.

Despite the somewhat rosy picture painted by some of the increases in applications and enrollment listed above, providers were very frank about the challenges this past cycle posed by COVID-19 when asked in an open-ended question what else is important for us to know. Every provider who gave feedback in this section mentioned how difficult the past year has been. Some of the reasons they cite are cost increases due to COVID-19 operational requirements and testing, trouble filling field staff positions, constantly changing country alert levels and entry requirements, program cancelations or postponements, student and family financial limitations, and increased anxiety and trouble connecting among students.

Through all these challenges, it is clear that many organizations met the challenges that COVID-19 created in new and innovative ways. Organizations made adjustments and created new programs in record time to be able to provide programs to this age group. Still, it was a very difficult cycle which resulted in layoffs, program cancelations, and negative balance sheets for some. As the pandemic continues to morph and become a new normal, it will be interesting to see if the interest in some of the new programs

(online, hybrid and domestic) continues or if it swings more toward international programs or a return to more traditional college paths.

Admissions and Enrollment Trends

Completed Applications
There were 17 organizations that reported completed application data this year. The cumulative number of completed applications in 2020-2021 was 3275 compared to 1748 in 2019-2020 resulting in an 87% increase in overall completed applications as shown in the chart below. Again, however, please note that these were not always the same gap year organizations that were providing this data last year and this year. There may even have been a disinclination by some programs showing decreases in their applications to complete the survey and provide that information.
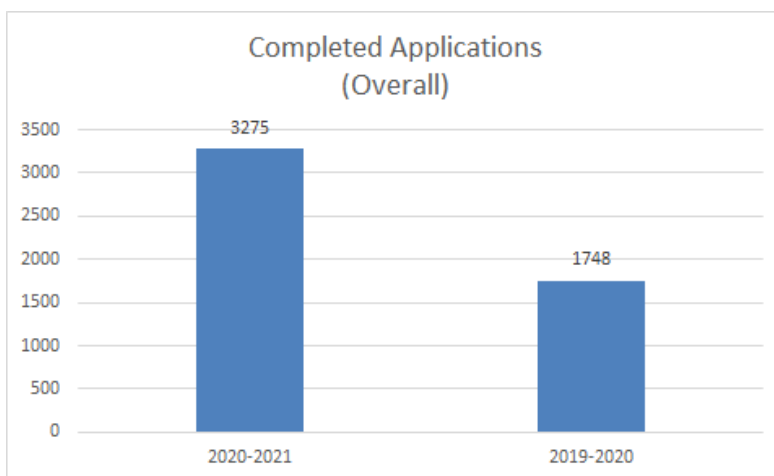
A further breakdown by organization shows the following: 8 (47%) providers reported an increase, 4 (24%) providers reported a decrease, 4 (24%) providers were in their first year of programs, and 1 (6%) provider reported no change in completed applications year to year as shown in the chart below. **These numbers suggest while there was a significant overall increase in gap year interest, it had wide variance among providers**.

Completed Applications (by Organization)
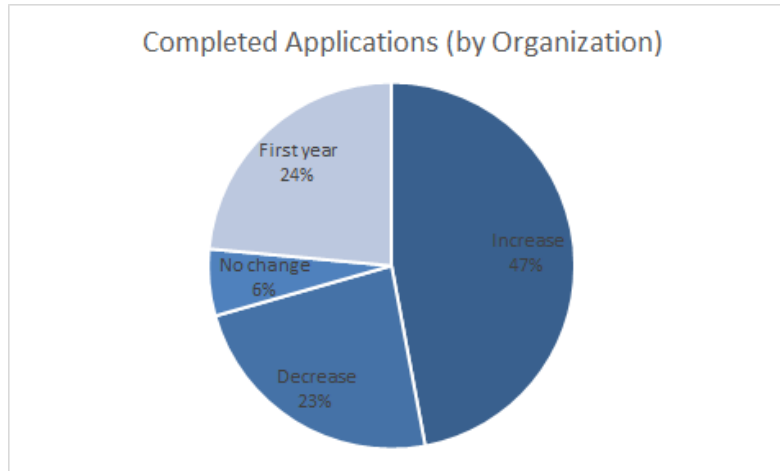
Acceptance Rates (Selectivity)

There were 15 organizations who provided enough data to calculate acceptance rates. The acceptance rate is calculated by dividing the total number of admitted gap year students by the total number of completed applications. This metric indicates how difficult it is to be admitted to a program. Acceptance rates are particular to each provider and may indicate how competitive the admissions process is for each organization. **In 2020-2021, acceptance rates varied from 16% to 100% as observed in the chart below.**

How Selective is each Program Provider? (2020-2021)
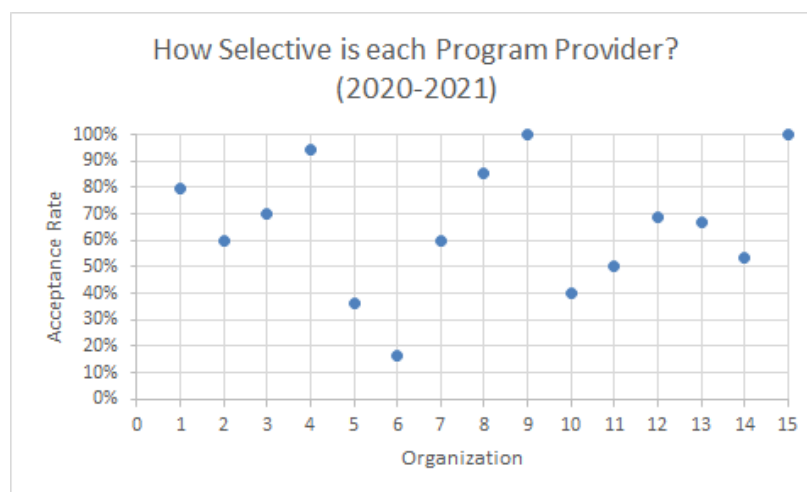
It should be noted that 5 organizations had acceptance rates below 50% compared to 10 organizations with acceptance rates at 60% or above. **This wide variance suggests there are several providers with highly competitive admissions processes; however, the majority of providers are not as competitive.**

Yield Rates (Student Commitment)
There were 15 organizations that provided enough data to calculate yield rates. The yield rate is determined by dividing the total number of enrolled students by the total number of admitted students. This metric indicates how committed students are to come to a program once they have been accepted. Yield rates are particular to each provider and may indicate how desirable it is for a student to be admitted to a program. **In 2020-2021, yield rates varied from 46% to 100%, as can be seen in the chart below.**
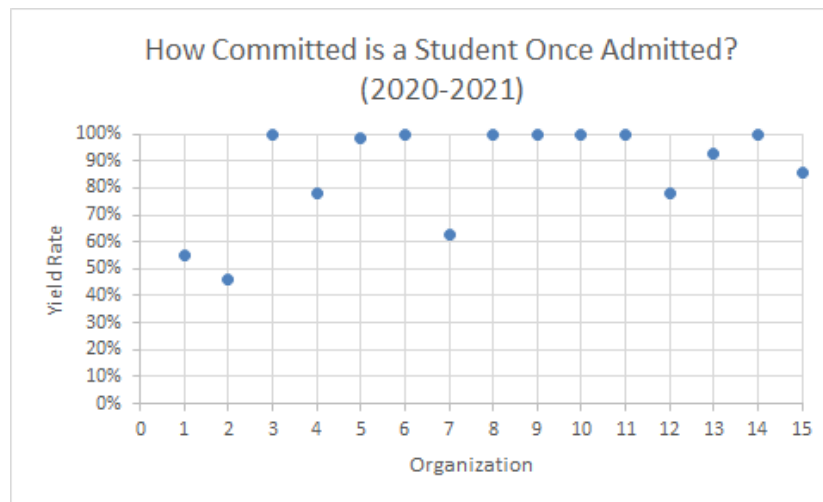
The average yield rate was 73% during the 2020-2021 year. It is recommended for organizations to individually track their yield rates from year to year as a helpful indicator of how effective they are in turning admitted students into enrolled students. Comparing a program's yield rate from year to year can also provide a key data point to be used when re-evaluating internal recruiting processes.

Enrollment Trends
There were 16 organizations that reported enrollment numbers comparing 2020-2021 to 2019-2020. 9 (56%) providers reported an increase in enrollment, 7 (44%) providers reported a decrease.

Enrollment Changes (by Organization)

Decrease
44%
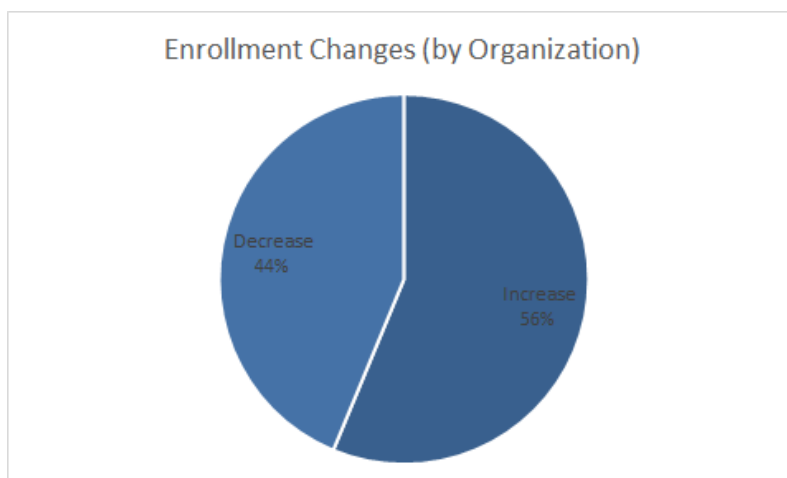
Increase
56%

The cumulative enrollment of all organizations who reported their data shows a 38% increase from 2019-2020 to 2020-2021. In 2019-2020, these providers reported 1,531 enrolled gap year students. In 2020-2021, these providers reported 2,113 enrolled gap year students as shown in the chart below.

Enrollment Year to Year
(Overall)

2113

1531

2020-2021   2019-2020
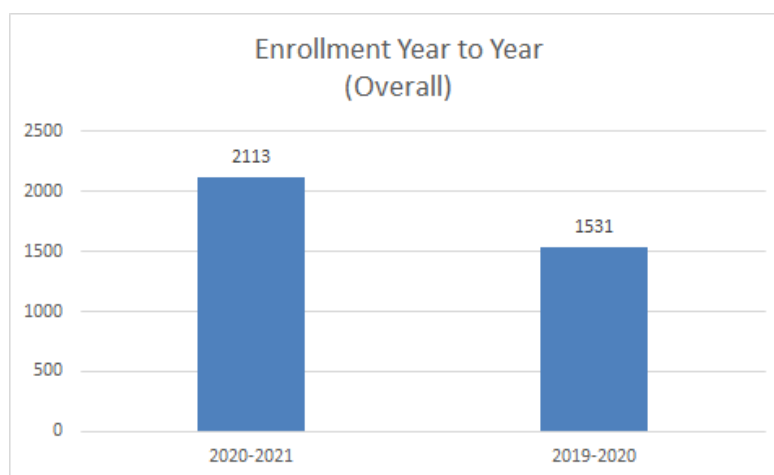
Participant Demographics

The survey asked for information on demographics of the students who were enrolled in each program. Below are the results of each category.

Nationality

There were 15 organizations that reported this data. The nationality of students who participated in these programs is as follows: United States of America (77%), Other Countries (21%), Canada (2%).

NATIONALITY

Other
21%

Canada
2%

USA
77%
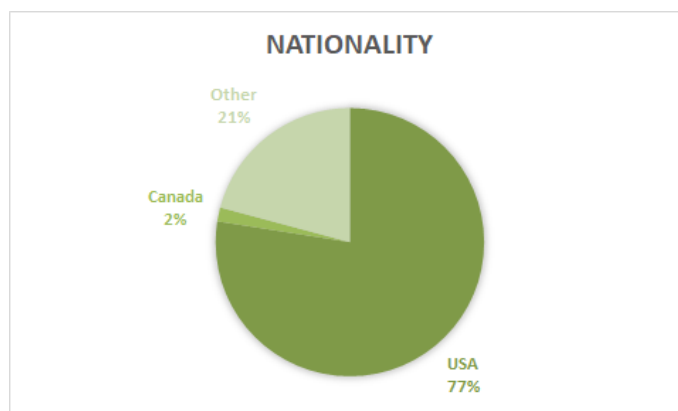
Gender

There were 23 organizations that reported this data. The gender of students who participated in these programs is as follows: Female (58%), Male (38%), and Other/Non-Binary (4%).

GENDER

Male
38%

Female
58%

Other/Non-
Binary
4%
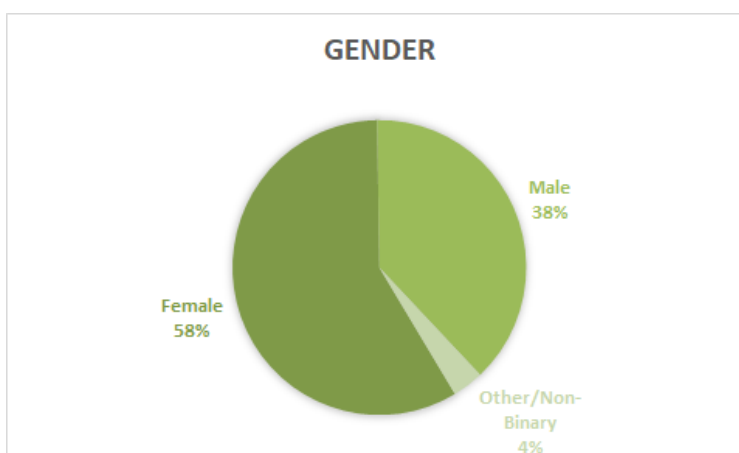
Race/Ethnicity

There were only a few organizations that reported data on race/ethnicity this year. Thus, we are unable to offer any meaningful collective data on this topic.

High School Education

There were only a few organizations that reported data on race/ethnicity this year. Thus, we are unable to offer any meaningful collective data on this topic.

Pre-Gap Year College Experience

There were only a few organizations that reported data on race/ethnicity this year. Thus, we are unable to offer any meaningful collective data on this topic.

Low-Income Students

There were 7 organizations that identified a total of 37 students qualifying as low-income status. While there is no standard definition of low-income used across all GYA membership, prior State of the Field surveys indicated most organizations use Pell Grant eligibility, Expected Family Contribution (EFC) from FAFSA, and/or household income to determine qualifications.

First-Generation Status

There were only a few organizations that reported data on race/ethnicity this year. Thus, we are unable to offer any meaningful collective data on this topic.

Financial Assistance for Participants

Federal Aid

Of the 24 gap year programs providing any form of financial assistance information, only three indicated student eligibility for any Title IV federal aid, and for two of those only for participants enrolled in some programs. This year we did not ask programs to provide any information about types or amounts of federal aid received, since they frequently did not have that information themselves.

Internal and Other External Aid

Of the 23 gap year programs that provided information about any form of internal financial assistance that they offered, 20 (**87%**) indicated that they offered need-based financial assistance and only three (**13%**) offered merit-based assistance. Participants at seven programs also received financial assistance from external non-profit organizations.

Need-Based Assistance

A smaller subset of programs offering need-based financial aid provided information about numbers of participants receiving that aid and total amounts offered. As in the past, there is a wide range in the percentage of participants receiving that assistance, as shown in this table:

Percent of participants receiving need-based	Number of providers at this Assistance level
<10%	4
11-25%	2
25-50%	3
51-100%	1

Of the 14 programs providing information about total need-based aid offered, a total of **$511,431** was offered to 114 participants, representing 9% of the total participants in those programs. **The average award for that group was $4,486 per participant**, with distribution of average awards shown below:

| Average need-based financial aid award	Number of providers at this level
<$5,000	7
$5,000-10,000	6
>$10,000	2

Merit-Based Assistance
Only two responding gap year programs indicated they offered any merit-based financial assistance to participants last year, in one program to only one participant and in another to 18 participants, with insufficient information provided about total amounts to calculate any meaningful average amounts.

Internal Assessment of Student Learning

Methods Used to Assess Student Learning and Program Impact
Twenty-four providers shared information on their methods for assessing student learning and/or outcomes. Respondents were allowed to select all methods that applied. Nearly all respondents selected more than one option.

Methods Used to Assess Student Learning (n=24)
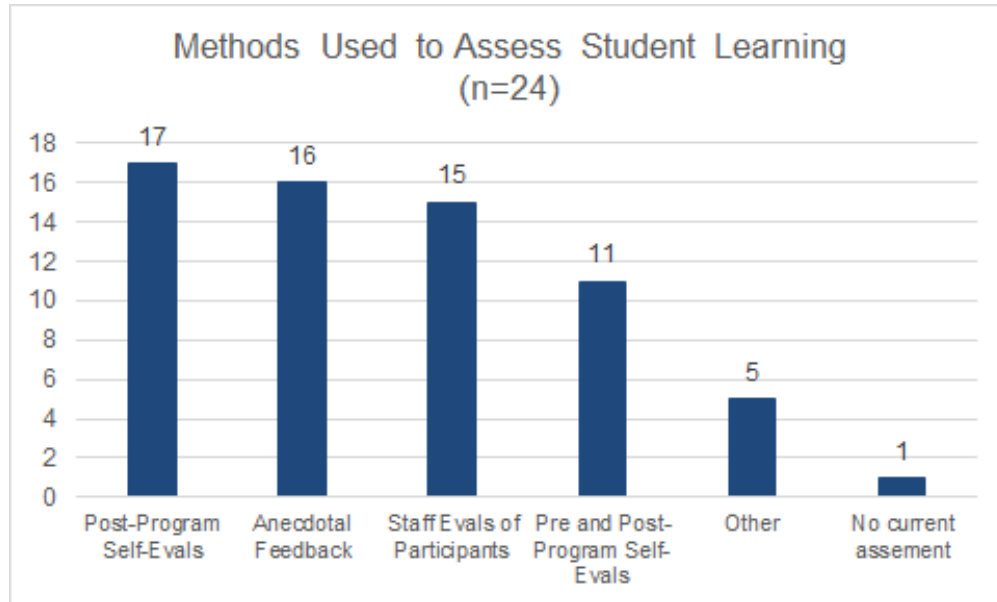
The most popular forms of assessment used by providers were post-program self-evaluations (71%), anecdotal feedback (67%) and staff evaluations of participants (63%). Pre- and post-program self-evaluations were less common (46%). Other forms of assessment used include external evaluations by partner providers, mid-program self-evaluations, and post-program interviews with participants.

Interest in a Workshop on Shared Program Impact Goals
We also asked providers if they would be interested in attending a session, organized by the Research Committee, to collectively identify shared program impact goals across the gap year industry.

Twenty-four providers responded. Of these, 12 (50%) said they were interested and 10 (42%) were not sure. Two providers (8%) indicated that they were not interested.

Interest in Shared Assessment Tools
We asked providers if they would be interested in using assessment tools designed by the GYA. Twenty-four providers responded. Of these, two-thirds (16, or 67%) said yes and two providers (8%) said no. Another six providers (25%) were unsure.

Interest in Shared Asssessment Tools (n=24)
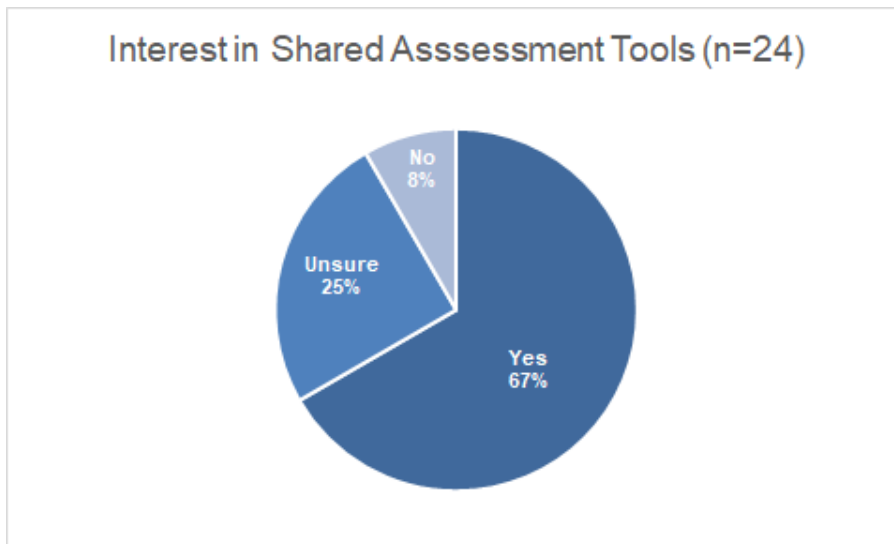
Those that were unsure expressed the following concerns and questions:

☐ Concern regarding alignment between shared measures and program aims (2)
☐ Organization already has assessment tools that they feel confident about (2)
☐ Curious how GYA intends to use the data internally and externally (1)

Together, these data show strong interest among respondents for conversations around program goals and the possible development of shared assessment tools. The Research Committee hopes to provide a space for initial conversations about this at the 2021 Gap Year Association conference. We look forward to hearing more thoughts and ideas regarding the possibility of shared tools there and welcome other suggestions and thoughts via email.

Gap Year Counselors

Organization Information
The survey was distributed to a GYA database of 53 potentially eligible counselor services. There were six gap year services who completed the survey. All respondents identified as GYA members and all were based in the USA.

Impacts of COVID-19 on Advising and Interviews
There was unanimous reporting on an increase in advising and interviews among gap year counselors. Only one counselor did not provide a response. Otherwise all gap year counselors cited the impact of COVID-19 to be an increase in advising and interviews. 67% of gap year counselors cited an increase of 25% or more as shown in the chart below.
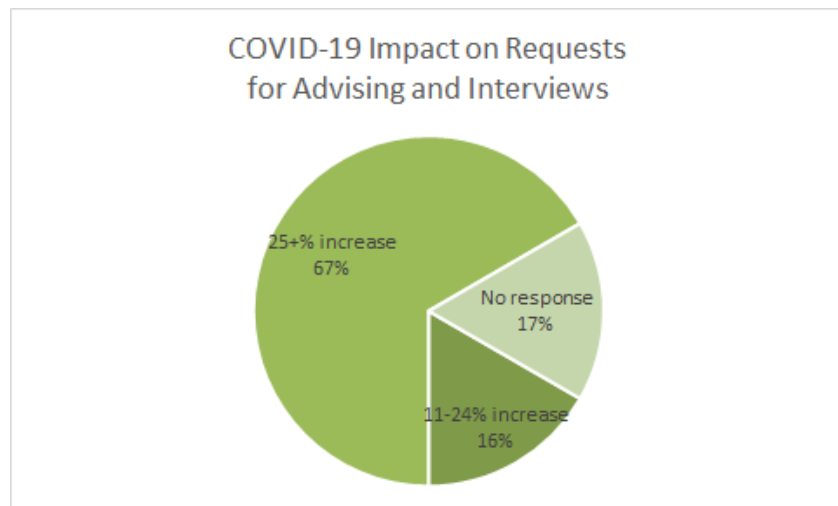
*How Else Did COVID-19 Impact You?*
Counselors were asked to expand upon any other impacts related to the pandemic. The results generated short open responses including the following:

- Increase in educating students and parents about travel and in-person vs. virtual experiences
- Normalizing of virtual events
    - Increased attendance at virtual events
    - Demand to create content relevant to virtual experience (i.e. Zoom friendly).
- Less predictable consulting cycle

○ Increase in frequency of consulting throughout the year in order to respond to the evolving implications of COVID-19
- Increase in outreach due to demand (i.e. more workshops and presentations)
- Increase in media requests
- Increased visibility of services
- Collaboration to assist in creation of more domestic gap options

Interviews and Client Services

There were six respondents who supplied data on interviews and client services over the past two business cycles. Interviews are a common process by which gap year counselors begin to connect with potential clients. **The comparisons from year to year show a 56% overall increase in interviews conducted from 2019-2020 to 2020-2021.** Client services are the number of students who actively participate in a gap year experience through the assistance of a counselor. **Client services increased by 37% from 2019-2020 to 2020-2021.** These numbers show an upward trend in activity among students utilizing a gap year counselor as demonstrated in the chart below.
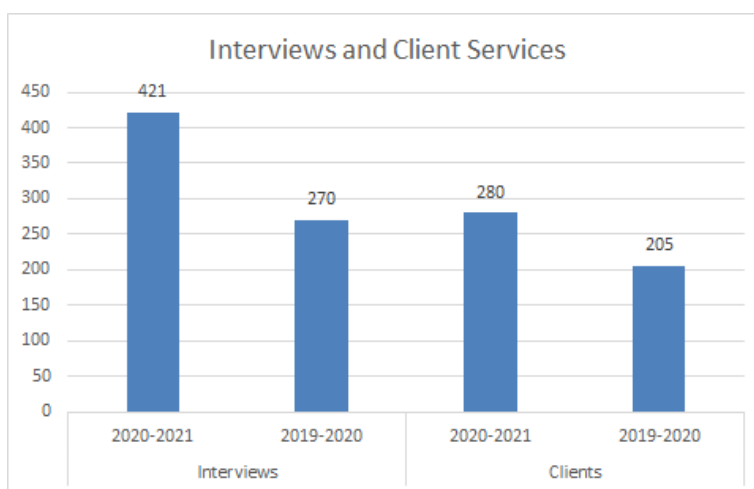
Gap Year counselors also provided information on how their clients designed their gap year experience in 2020-2021. Five respondents provided information on 197 gap year clients. The results indicated a breakdown of 109 (55%) staying in the United States, 20 (10%) traveling outside the United States, and 68 (35%) doing both as demonstrated in the chart below.

How Clients Designed their Gap Year Experience 2020-2021

Stayed in the United States: 55%
Traveled outside the United States: 10%
Did Both: 35%
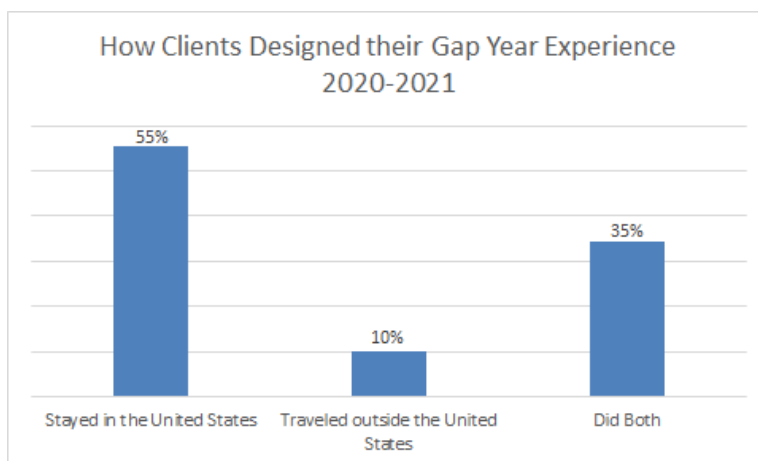
Destinations
When asked about the most popular gap year destinations in 2020-2021, the following countries were listed in this order: USA, Ireland, Israel, and Costa Rica.

Online Delivery Format
All six respondents indicated to have clients who participated in an online delivery format included in their gap year experience. **The respondents reported a total of 35 (or 12.5%) of all clients in 2020-2021 who included an online delivery format in their experience.**

Transition Services
There were five respondents who offered transition services. Transition services are any additional support provided immediately following a clients completion of their gap year experience. **In 2020-2021, those services were utilized by clients in the range of 20% to 100% of the time.**

Client Demographics
All six respondents reported data on gender. Clients were represented as follows: Male 147 (51%), Female 132 (46%), and Other/Non-Binary 7 (3%).

Gender
- Other/Non-Binary 3%
- Male 51%
- Female 46%
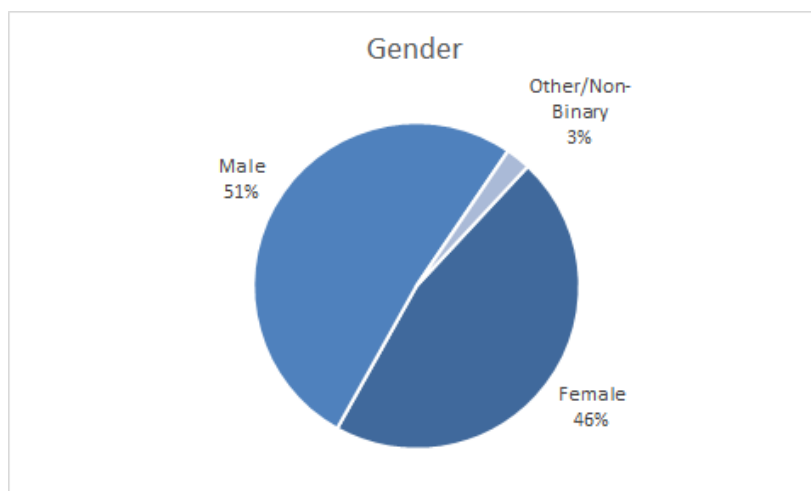
There were only a few organizations that reported data on the following topics: nationality, race/ethnicity, type of high school, previously attended college, low-income status, and first-generation status. Thus, we are unable to offer any meaningful collective data on these topics.

Range of Costs for Advising Services
There were five respondents reporting on the high and low range of the cost of gap year advising services. The low range was reported from $150 to $1850. The high range was reported from $1500 to $5400. The average low range was $1070. The average high range was $2730.

Financial Assistance to Clients
There were five respondents who indicated they offer financial assistance. **A total of $17,100 was offered to 28 gap year clients during the 2020-2021 year.**