



**2019 State of the Field Survey
General Report**

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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 enabled this report to be possible.

Table of Contents

Preface.....	3
Organization and Program Information.....	4
Location	
GYA Membership Status	
Year Founded	
College Credit	
Popular Destinations	
Enrollment and Demographics.....	9
Enrollment Trends	
Demographics	
What Data Do Organizations Collect?	
Gender	
Race	
Education	
First Generation	
Low Income	
Parental Immigration Status	
Financial Aid.....	19
Need based Aid	
Merit based Aid	
Sneak Peek of the Comprehensive Report.....	22
Future Recommendations.....	24

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 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. However, this is the first year that an executive report has been published in this format under the direction of the Gap Year Association Research Committee.

The Gap Year Association 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 Gap Year Association network. Those who participate in the survey are given an exclusive report with access to more in depth data than what is reported in the results made available to the general public. The study is also dedicated to maintaining anonymity for all participating organizations.

Organization and Program Information

Survey Participants

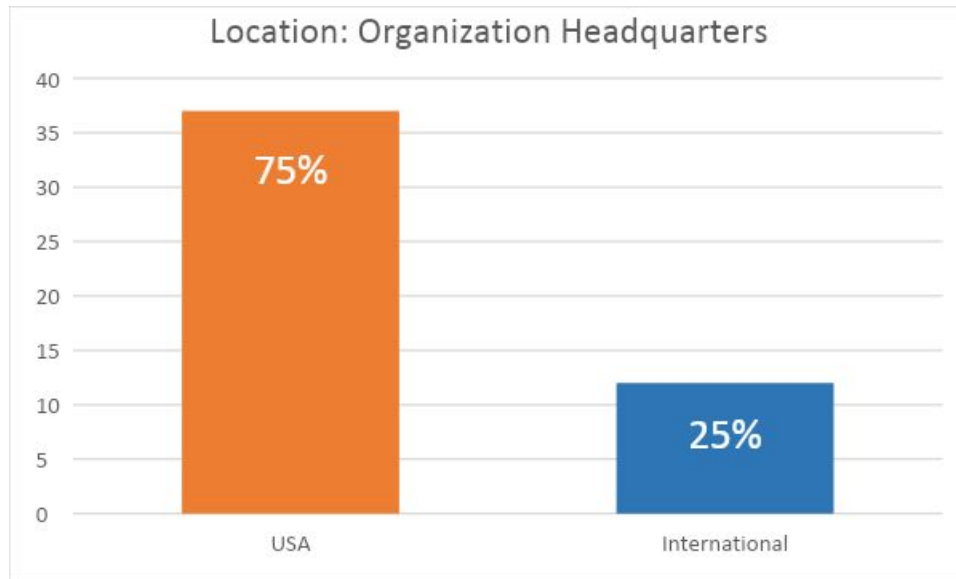
A total of 53 organizations started the 2019 State of the Field survey. Four respondents were dropped from the analysis. The dropped respondents included: 2 high schools and 1 college that promote or encourage gap years but do not offer their own gap year program and one gap year provider that started but did not complete the survey.

Of the remaining 49 respondents, five are gap year consultants - or consulting organizations - that advise gap year students but do not offer their own formal gap year programs. Due to the fact that the survey questions were designed with providers (or gap year programs) in mind, some questions were not relevant to gap year consultants. In other cases, consultants tended to answer questions in ways that reflected a different interpretation than was intended or would be the case for a program provider. The research committee advises that in future iterations of the State of the Field survey, providers and consultants are separated and asked different questions that more accurately reflect their positions in the field. We believe that the questions and data relevant to each of these stakeholders is sufficiently different - but equally important - to warrant the creation of different survey instruments.

Of the 44 other respondents that completed the survey, five are university-affiliated or university-run gap year programs, five explicitly identify as religious gap year programs (four Christian and one Jewish), three are organizations that facilitate work and volunteer placements for gappers, and one is a fully accredited associates degree program.

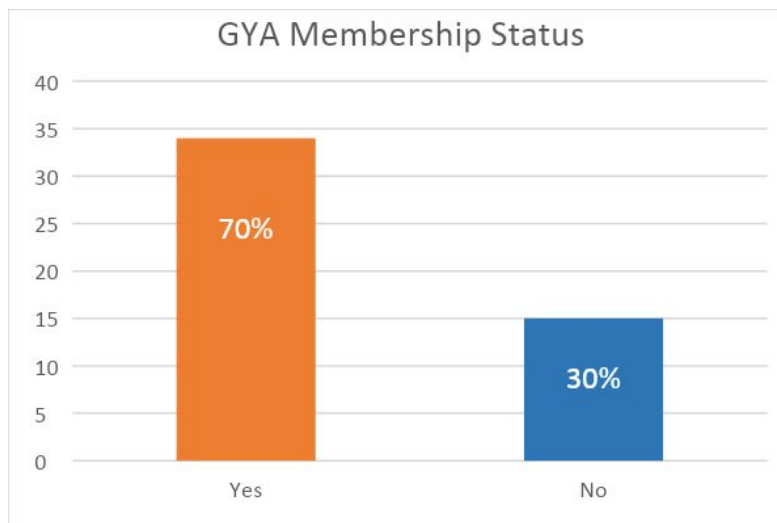
Location

Respondents were asked where (city, state, and country) their organization was headquartered. 37 of the survey respondents are based in the USA. The remaining programs are headquartered internationally. International organizations included those based in the UK (3), Canada (2), and Spain (2), among others.



GYA Membership Status

Thirty-four of the respondents are members of the GYA and 15 are not.¹



All five gap year consulting organizations are members of GYA and are included in the 34 member organizations. This means that 29 GYA provider members responded to the survey. The GYA currently lists 54 providers as members. The research committee

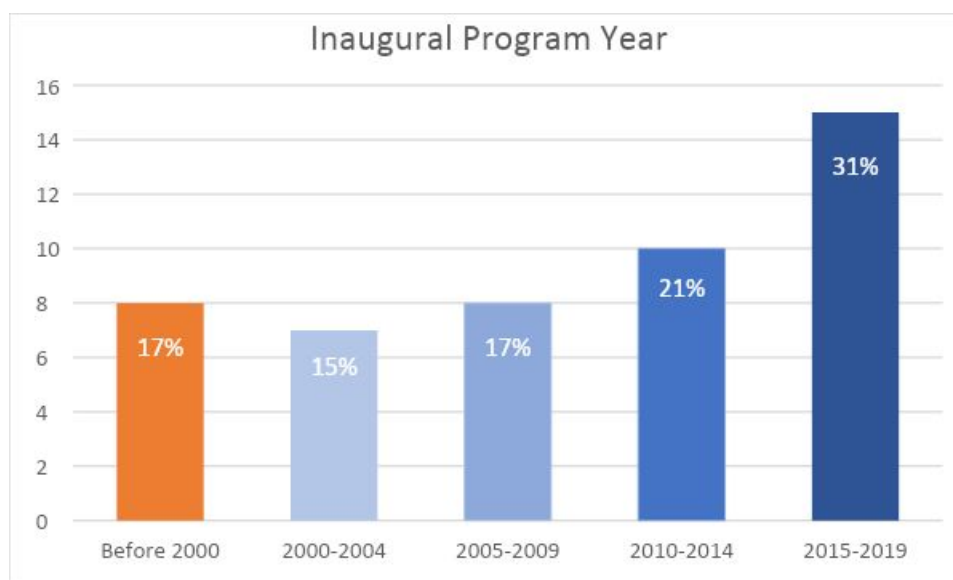
¹ One respondent was unsure of their membership status, but the committee verified that this respondent was not a member.

recommends specifically targeting member organizations and following up several times with them in order to ensure more complete data on the state of the field in future years.

Year Founded

Respondents were asked to report the year in which their organization ran its first gap year program.² **Results suggest that the majority of gap year programs started after the turn of the century.** Forty of the forty-nine respondents ran their first gap year program in or after the year 2000. 8 respondents ran programs prior to 2000. One respondent (a consultant) left this question blank.

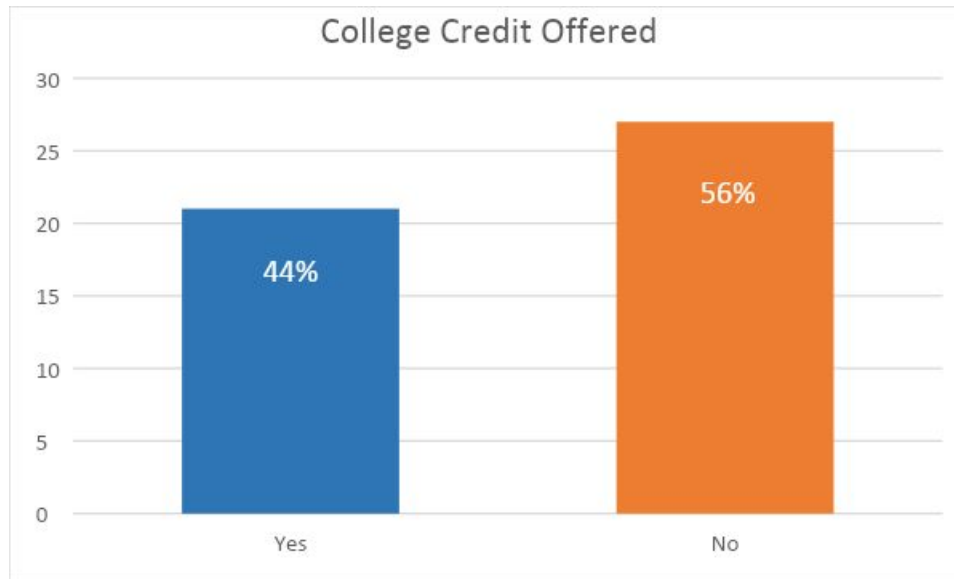
Twenty-five organizations, or roughly half of all respondents, ran their first program in 2010 or later. Fifteen organizations, or roughly one-third of all respondents, ran their first program within the past 5 years. The chart below shows a historical breakdown of when programs established their inaugural year. Since 2010, there has been a significant addition of programs entering the gap year field.



College Credit

The study asked respondents whether or not their gap year program offers college credit. **Twenty-one of the respondents (44%) offer college credit for their programs while twenty-seven (56%) do not.** One respondent (a consultant) did not answer this question. The remaining consultants (4) indicated that they do not offer college credit. Two respondents indicated they were in the process of seeking accreditation.

² Note that for consulting organizations, responses likely indicate the year they began formally advising gap year students.

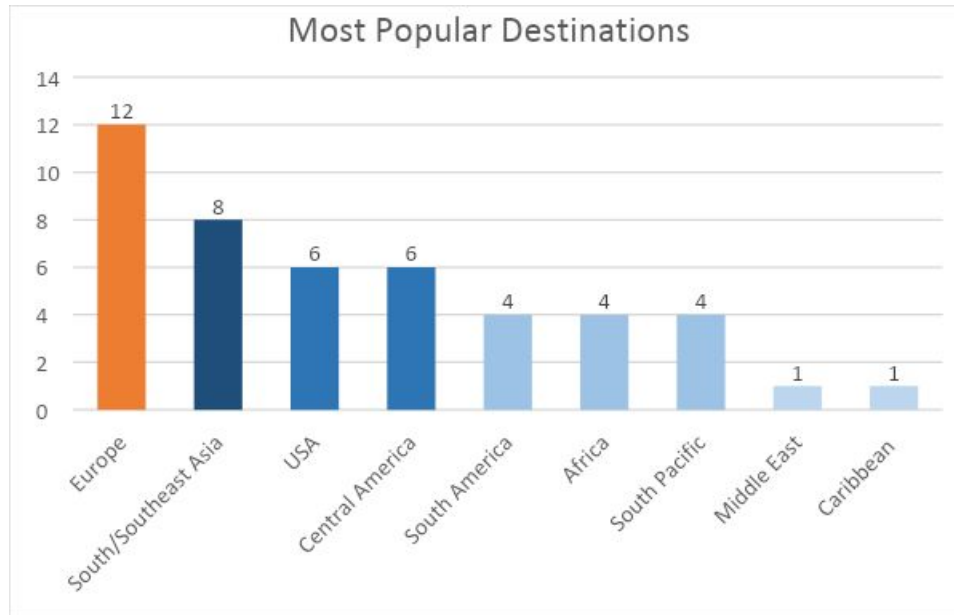


College credit was offered in several ways. One respondent was independently licensed and accredited.³ Five respondents offered credit through partnerships with Portland State University, either directly or through the Gap Year Association. Four respondents offered credit through partnerships with Western Colorado University. Several respondents have partnerships with university-run gap year programs such as Tufts University’s 1+4 program: students participating from those universities receive college credit while other participants on the same program do not. Other universities offering credit include: Naropa University, Clark University, Seattle Central Community College, American University, American Jewish University, and Capilano University.

Top Destinations

Forty-six respondents entered a most popular program destination. **The most popular destinations by region are Europe (25%), South or Southeast Asia (17%), the USA (13%) and Central America (13%).**

³ Organization offers a 2-year liberal arts associates degree.

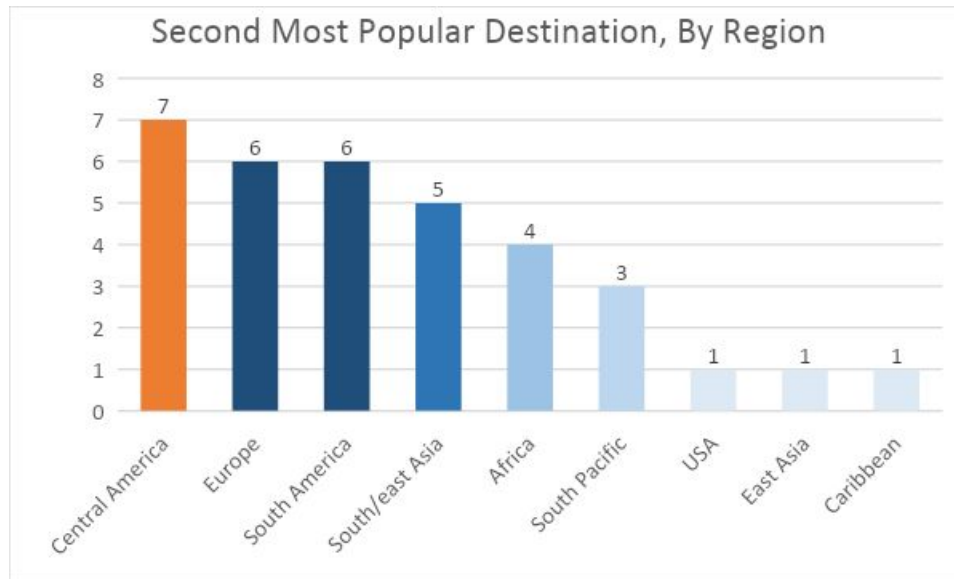


The most popular European destinations include: the UK, Spain, and Italy. The most popular destinations in Southeast Asia are Nepal and India. In Central America, Costa Rica and Guatemala are the top destinations, while in South America, Ecuador is the most commonly listed country destination.

Five of the six respondents that list the USA as the most popular destination only list one destination. In other words, the USA is the most popular destination but also the only destination offered by that organization.

Second Most Popular Destination

Only thirty-four respondents entered a relevant second destination. Of those that responded, **the second most popular destinations by region were Central America (21%), Europe (18%), South America (18%) and South and Southeast Asia (15%).**



Enrollment and Demographics

Enrollment Trends

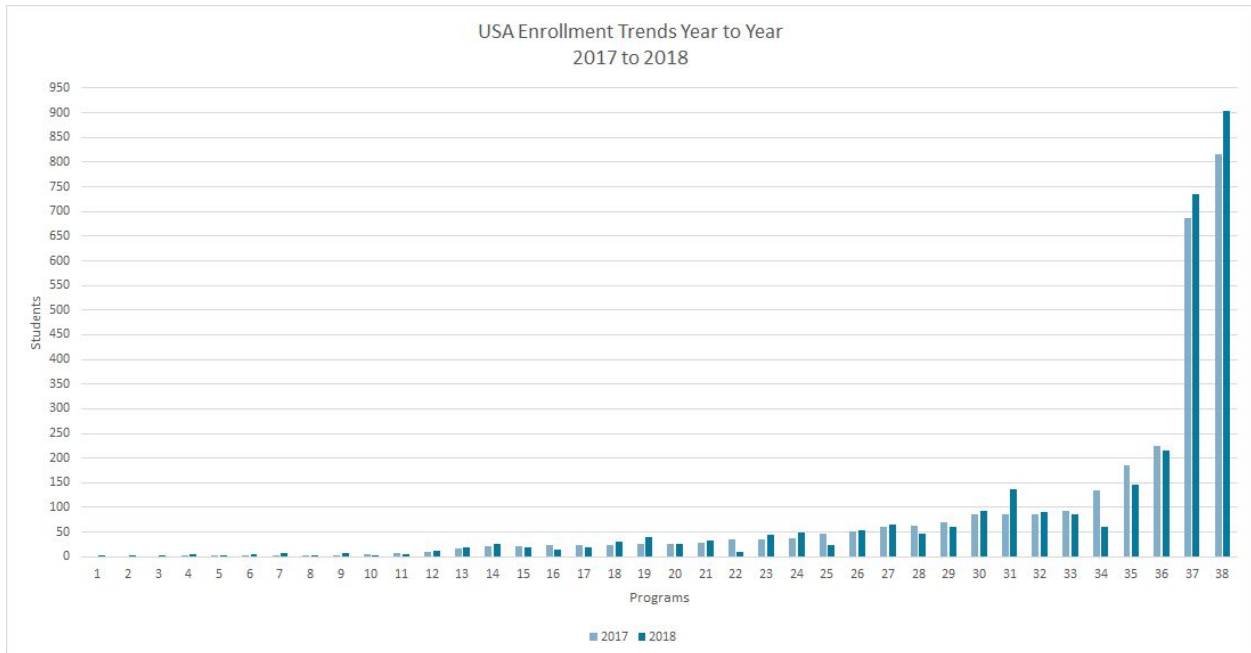
This year, enrollment trends were reported by 38 different programs and consultants. Of those 38, 23 (61%) programs reported an increase in enrollment, 14 (37%) reported a decrease in enrollment, and 1 (3%) reported they were flat year over year.

The results suggest that general enrollment trends have continued to grow year to year; however, there is a significant proportion of organizations that have experienced a decrease in enrollment.

The charts below show a breakdown in enrollment trends from a few different views, with each number on the x-axis representing an individual organization.

All Programs

This chart views all programs side by side with 2017 and 2018 enrollment numbers. It is helpful for viewing all programs together in order to appreciate the variance in programs by size. However, in order to analyze the trends more clearly, as well as to help organizations see where other similar programs have performed, we further break programs down by size.

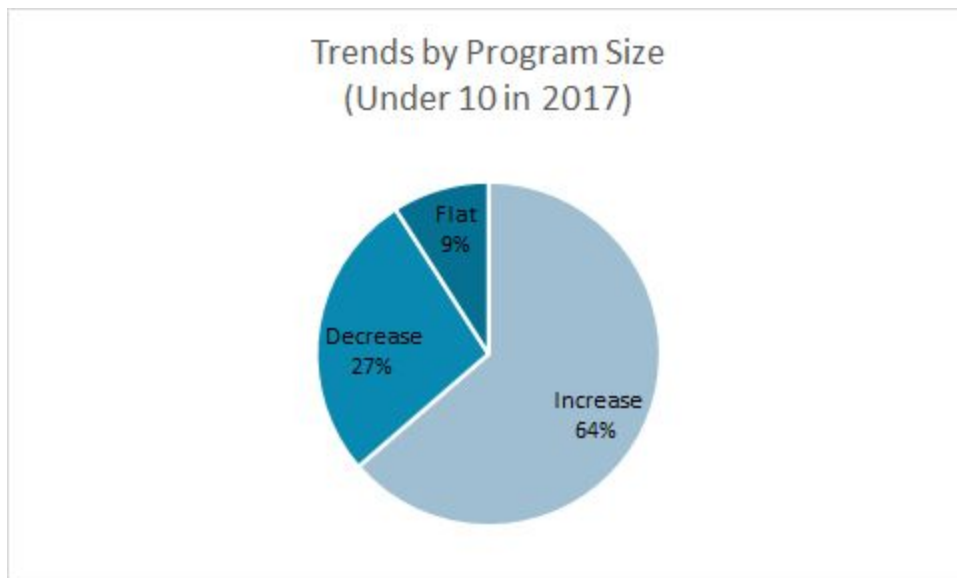
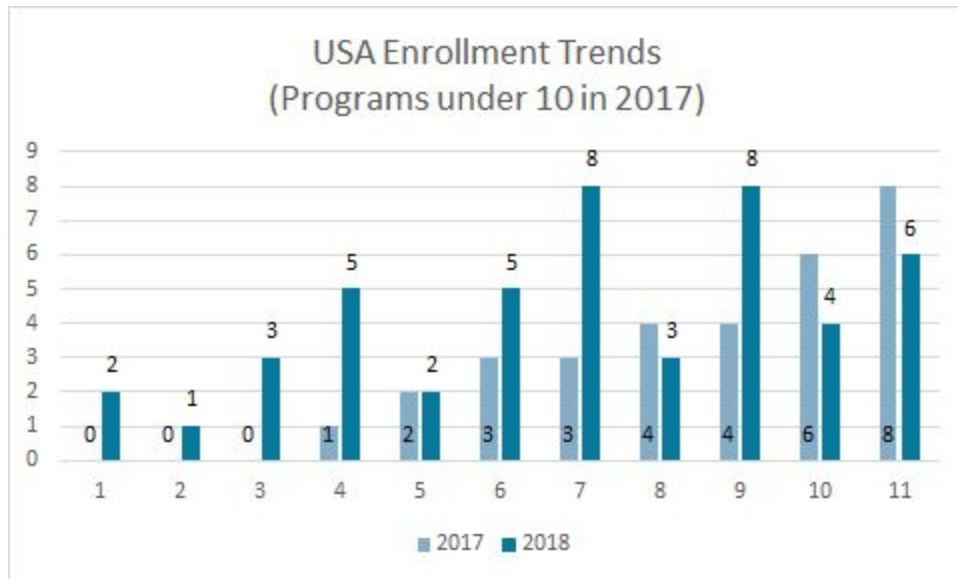


Programs by Size

When programs are broken up by general size based on number of students who enrolled in 2017, it is easier to see how trends affected programs of under 10, under 100, and over 100 participants. Enrollment numbers are shown by placing 2017 numbers at the base of the bar graphs and 2018 numbers at the top of the bar graph for each organization.

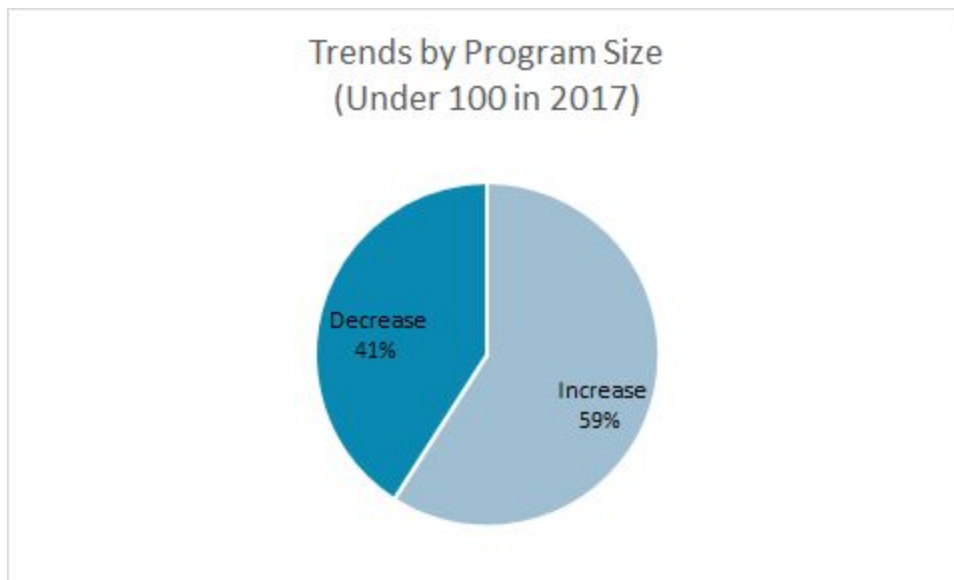
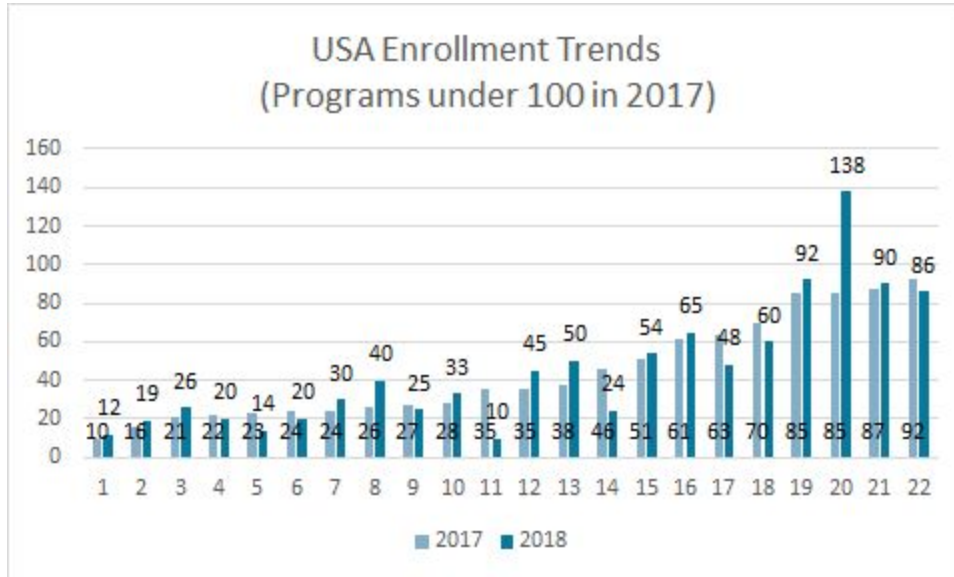
Programs under 10 (Smaller Programs)

The following charts show programs on the x-axis who enrolled less than 10 students during 2017. The number near the base of the x-axis is total enrolled students in 2017. Numbers at the top of the bar graphs represent total enrolled students in 2018. **The breakdown of trends in enrollment for organizations of a smaller size are: 64% saw an increase, 27% saw a decrease, and 9% were flat year over year.**



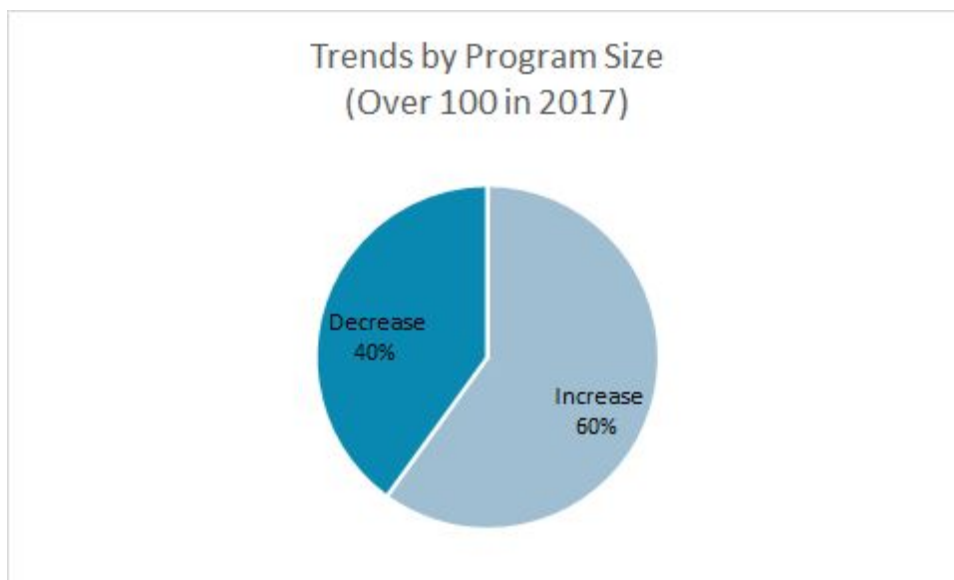
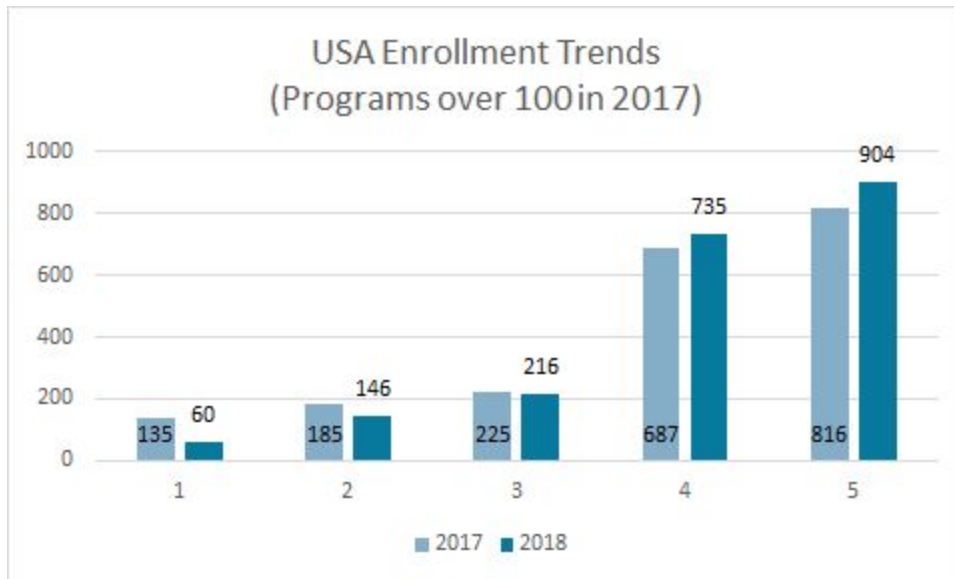
Programs under 100 (Medium Sized Programs)

The following chart show programs on the x-axis who enrolled less than 100 students during 2017. The number near the base of the x-axis is total enrolled students in 2017. Numbers at the top of the bar graphs represent total enrolled students in 2018. **The breakdown of trends in enrollment for organizations of medium size are: 59% saw an increase, 41% saw a decrease year over year.**



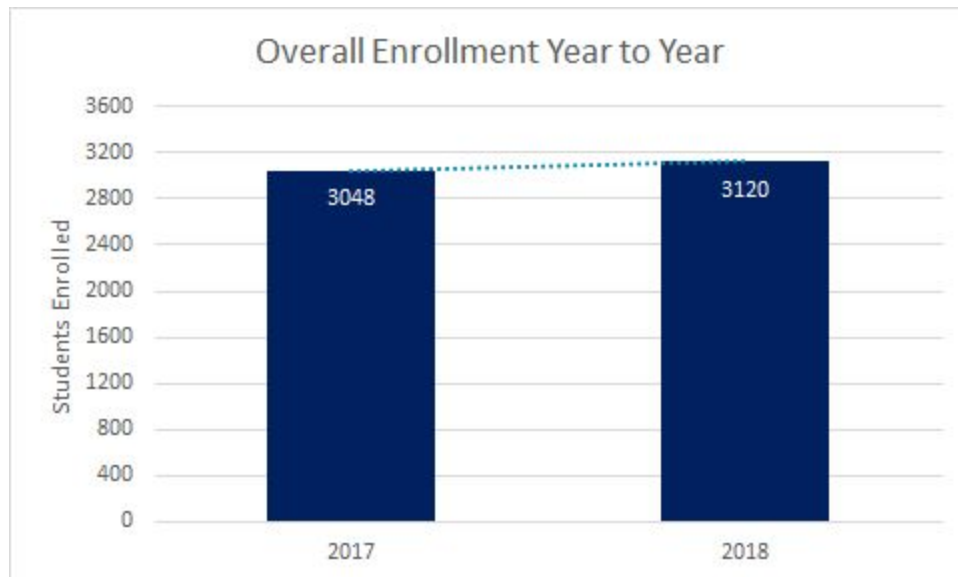
Programs over 100 (Larger Programs)

The following charts show programs on the x-axis who enrolled more than 100 students during 2017. The number near the base of the x-axis is total enrolled students in 2017. Numbers at the top of the bar graphs represent total enrolled students in 2018. **The breakdown of trends in enrollment for organizations of larger size are: 60% saw an increase, 40% saw a decrease year over year.**



Overall Enrollment

In this final view, **the cumulative enrollment of all reported programs and consultants shows a slight increase in overall enrollment from 3048 to 3120 (2%) from 2017 to 2018.** Thus, while nearly 40% of programs and consultants reported a decrease or were flat in enrollment, the volume of students enrolled in a gap year has still slightly increased.

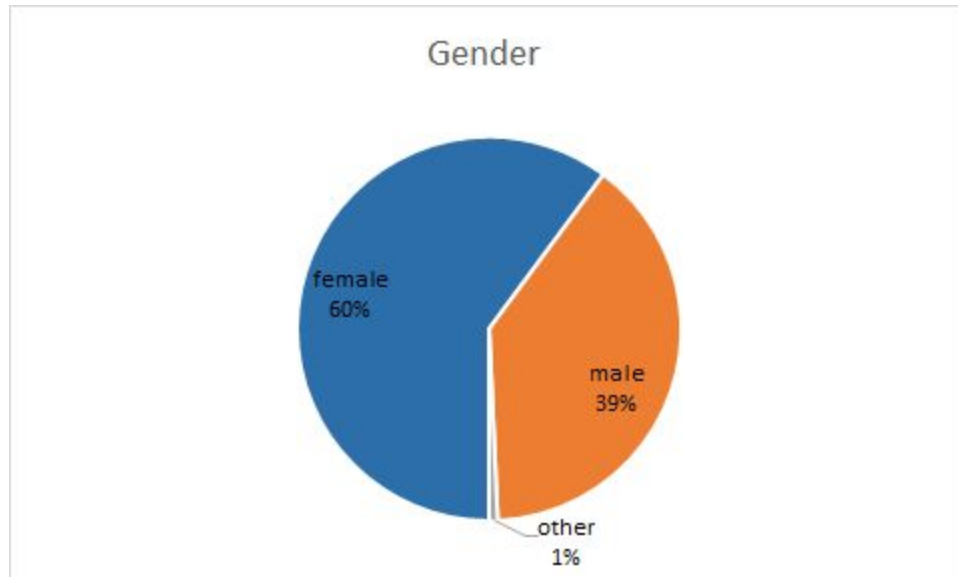


Demographics

The survey asked for information on demographics in the following areas: gender, race, education, first generation student, low income, and parental immigration status. Below are the results of each category.

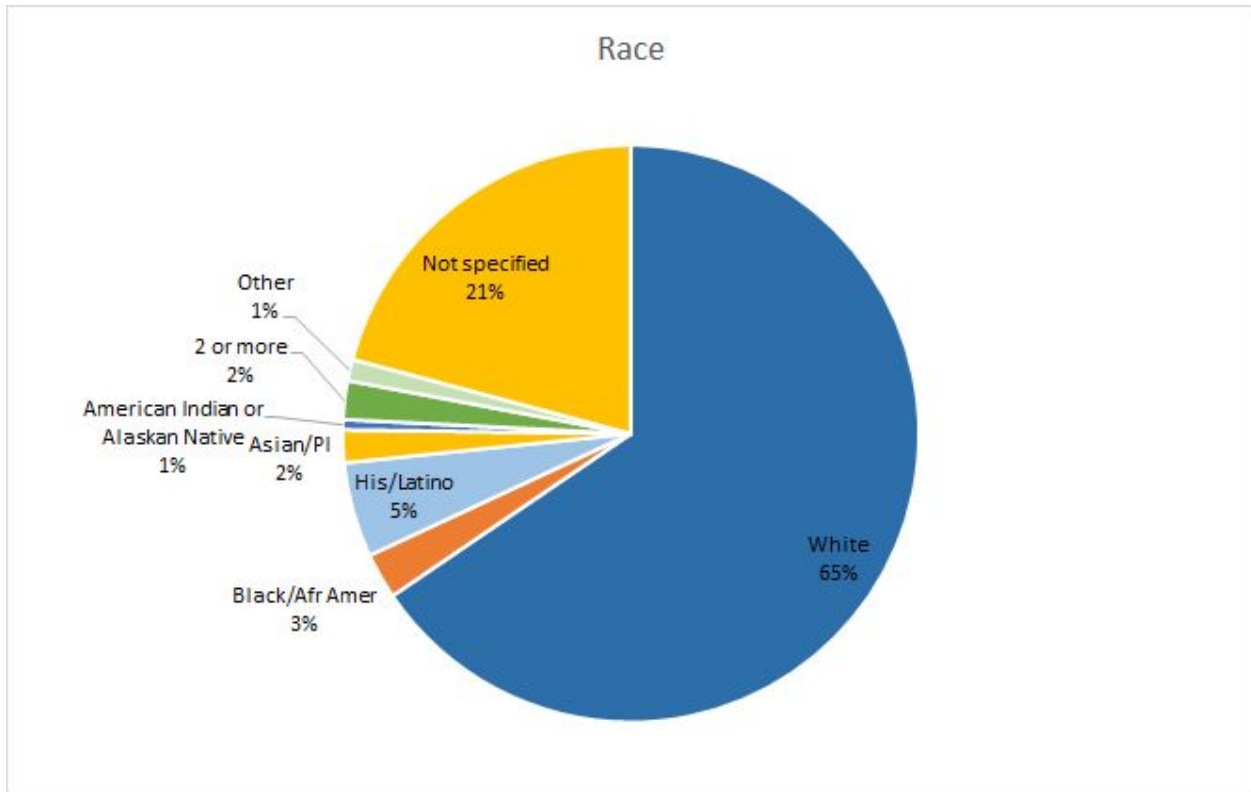
Gender

Gender was the most commonly collected demographic with 82% organizations contributing data. Percentages are broken down as follows: Female (60%), Male (39%), Other (1%).



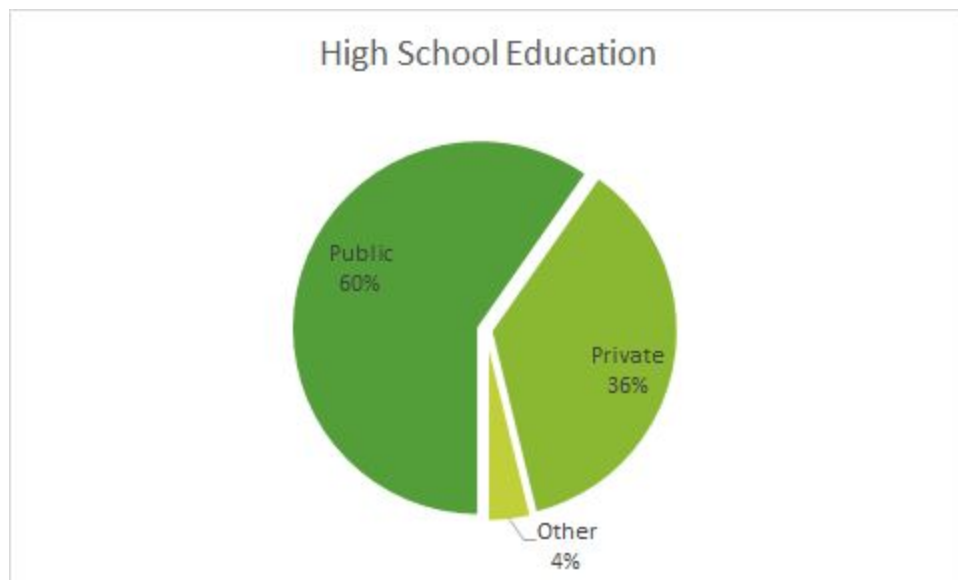
Race

Race was collected by 29% of organizations. 59% said they do not collect this data. Race was broken down as follows: White (65%), Hispanic/Latino (5%), Black/African American (3%), Asian/Pacific Islander (2%), 2 or more (2%), American Indian or Alaskan Native (1%), Other (1%). Not specified (21%) indicates that data was not collected or able to be collected.

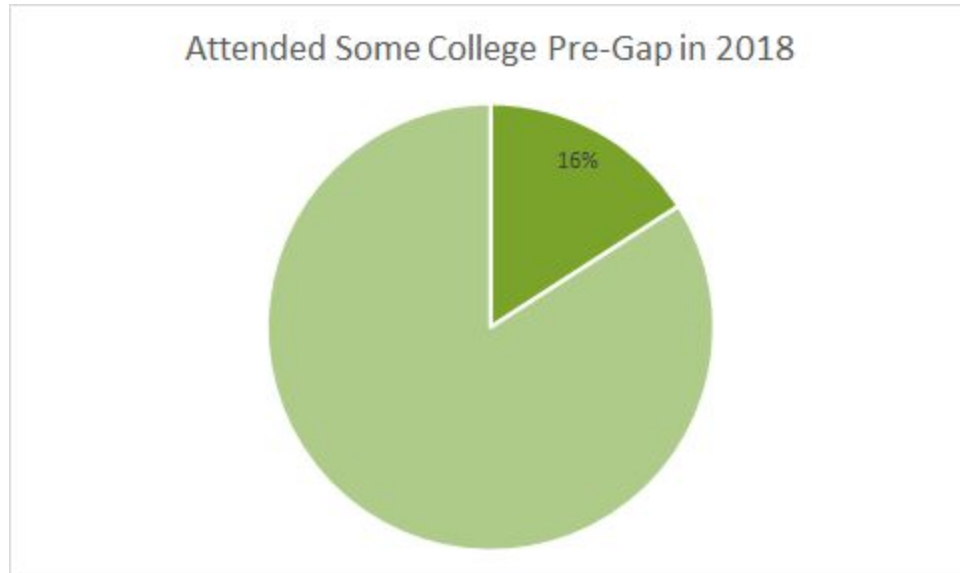


Education

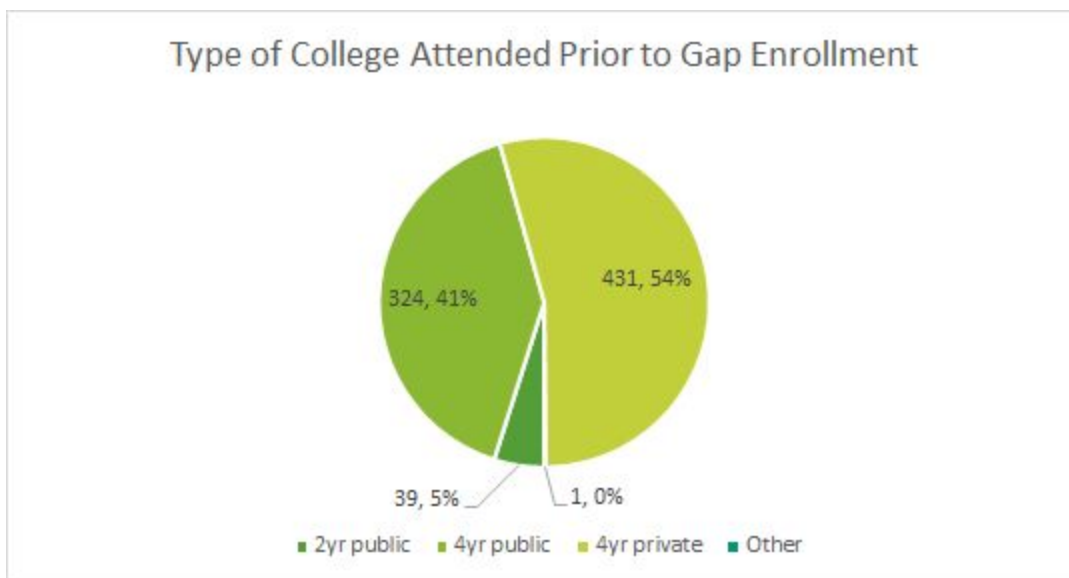
55% of organizations said they collected data on educational background of their students. Here is the breakdown of what type of high school education those students had previous to enrolling in their gap year: Public (60%), Private (36%), Other (4%).



When asked what percentage of students attended some college pre-gap in 2018, the results showed an **average of 16% of students enrolled in 2018 had already spent some time in college prior to their gap year.**



Of those students who had previously attended some college, here is the breakdown of what types of institutions they were at prior to attending their gap year: 4 Year Private (54%), 4 Year Public (41%), 2 Year Public (5%), Other (0%).



The number of students is shown in the above pie chart to show the volume of students who reportedly went to college prior to enrolling in a gap year in 2018. According to this

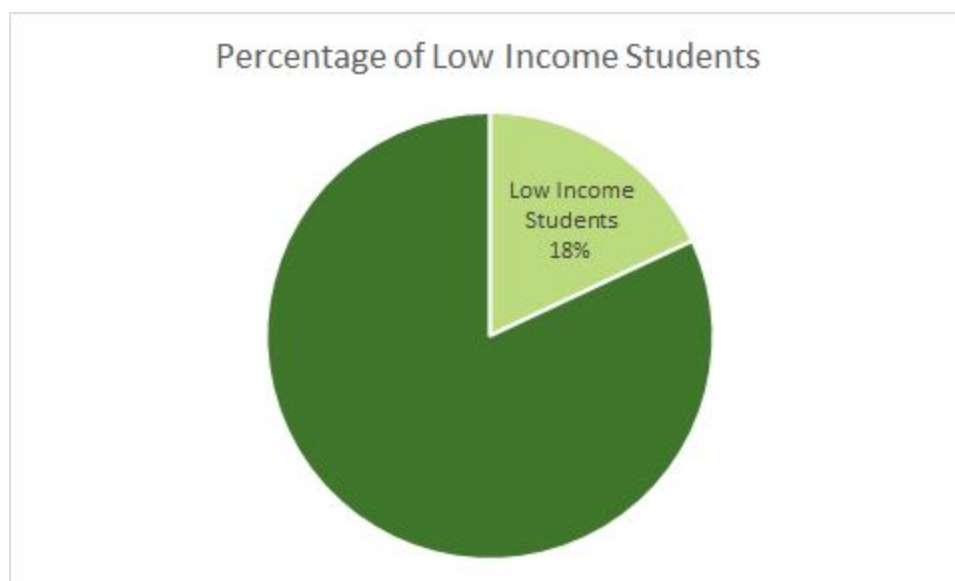
survey, **795 students were reported as having attended some college prior to their gap year.**

First Generation

A First Generation student is defined as “(A) An individual both of whose parents did not complete a baccalaureate degree; or (B) In the case of any individual who regularly resided with and received support from only one parent, and individual whose only such parent did not complete a baccalaureate degree.”⁴ **First generation students were the least likely demographic to be collected with 84% of organizations saying they do not collect this data. However, the survey did account for 150 first generation students enrolled in 2018 reported by a combination of 4 different organizations.**

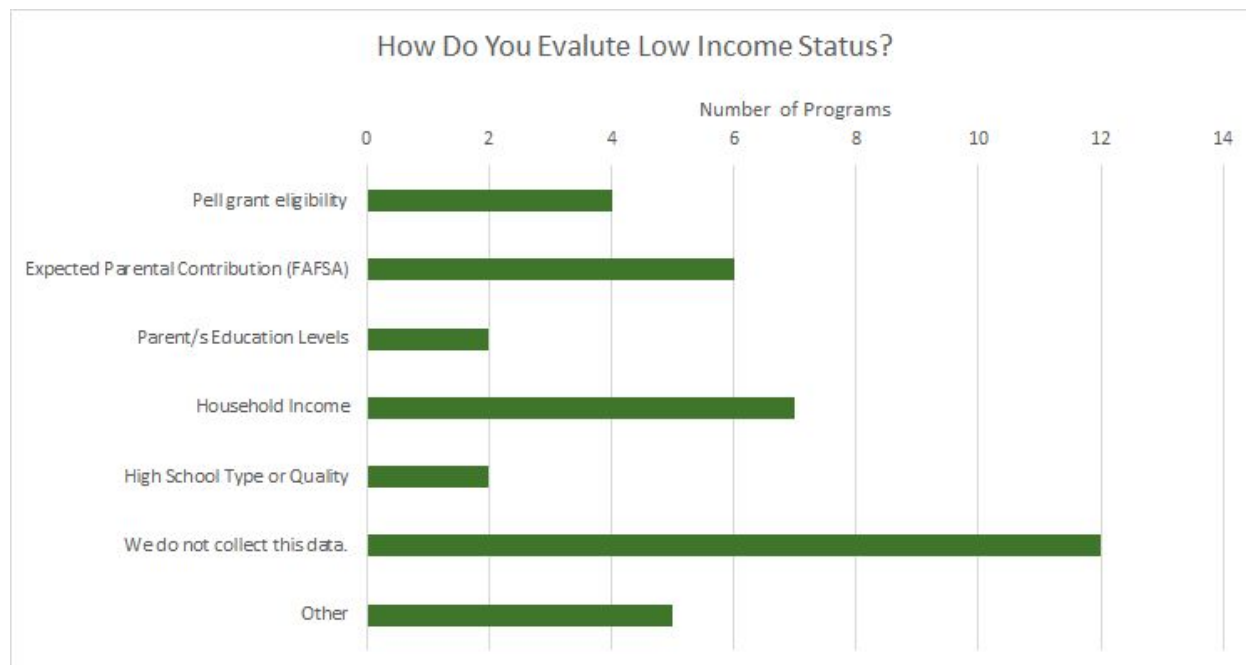
Low Income

When asked about representation among low income students, 19 (50%) of organizations responded. While percentages per organization ranged from 0 to 75%, **the average was 18% of students are from low income backgrounds.**



The survey also asked how organizations properly evaluate this low income status. The chart below demonstrates the multiple factors organizations use in assessing low income status. Those who marked ‘other’ included the following factors: “student aid office data” and “financial need is self-determined”.

⁴ As defined by the Higher Education Act amendment of 1998.



Parental Immigration Status

The survey asked, “What percentage of gap year students had one or both parents who were born outside of the United States?” 12 organizations responded to this question with an average of 32% reporting one or both parents who were born outside of the United States.

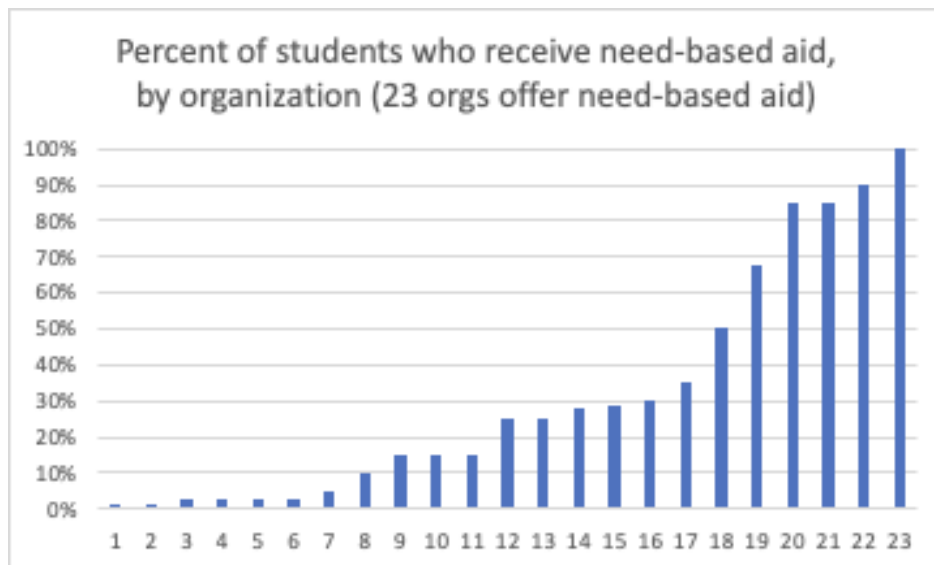
Financial Aid

Need Based Financial Assistance

This section captures descriptive data by asking three consecutive questions: 1) do you offer need-based financial aid? (yes/no); if yes, 2) what percent of your students receive financial aid and; 3) how much total need-based aid does your organization provide. **Of the 43 organizations that responded to question 1, 60% (26) indicated they do offer need based financial aid, and 40% (17) indicated they do not.**



Of the 26 organizations that do offer need-based aid, 23 indicated the percentage of students receiving need-based aid. **On average, nearly one in three students receive need-based aid in organizations that offer it.** However, the difference between organizations in this category is substantial. **Four organizations offer need-based aid to over 85% of their students.** The following graph shows the percentage of students who receive need-based aid in each of the 23 organizations who offer it.



The total amount of need-based aid provided to students reported in this survey for 2018 was \$1,949,152. There was one significant outlier, making the median perhaps a

more accurate data point for capturing the “average”. The mean (calculated without the outlier) is also listed below.

Total Need-Based Aid Offered in 2018

Total	\$1,949,152*
Mean	\$97,458
Median	\$12,900
Mean without outlier	\$45,149

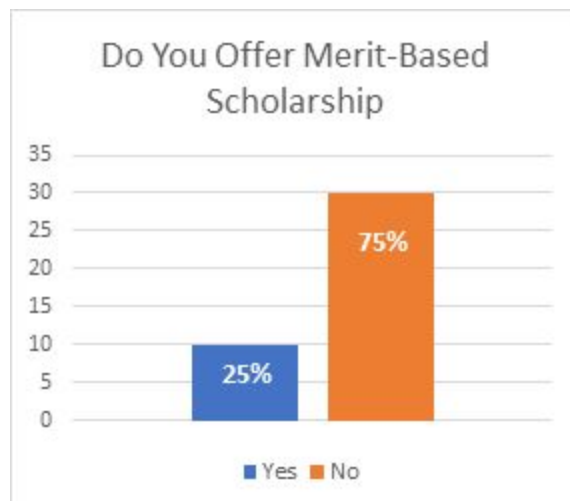
***\$3,794,774 with the addition of one organization who provided data post-survey.**

**Note on Need-Based Aid Total*

One organization that offers substantial need-based aid and has traditionally participated in the State of the Field survey did not participate this year. When contacted post-survey, this organization provided the editors with their total need-based aid offered: \$1,845,622. If added to the sum reported in the survey, this would result in a **total 2018 need-based aid of \$3,794,774.**

Merit-Based Financial Assistance

Participants were asked the same three questions for merit-based aid: 1) Do you offer merit based aid(Yes/No); 2) if yes, what percent of students receive merit-based aid, and; 3) how much total merit based aid do you offer. Of the 40 responses to question 1, **75% (30) organizations indicate they do not offer merit-based aid, and 25% (10) indicate they do offer merit-based aid.** Of the 10 organizations that do offer merit-based aid, 9 provided information on the percentage of students who receive merit-based scholarship. **On average, 49% of students receive merit-based scholarships when it is offered.** Of the organizations that reported offering merit-based aid, 6 reported dollar amounts, **totaling \$281,900.**



Total Merit-Based Aid Offered in 2018

Total	\$281,900
Mean	\$46,983

Sneak Peek of the Comprehensive Report

Questions on the survey also included content regarding marketing strategies and other open-ended questions about the broader 'state of the gap year field'. A comprehensive report is given to each participating organization as an additional benefit to participating in the survey. Here is an example of one of those questions:

If you use "paid online listings," where do you currently list information on your program?

The chart below shows how many organizations mentioned the following platforms for paid online listings. Those who marked 'other' were asked to name what platform they are using. Here is the list of those platforms': All Kinds of Therapy, Boulder Valley School Directory, CC, Paper Guide, USA Gap Year Fairs website, Volunteer World, Wise Oceans, YATA, Youth Passageways. Each was mentioned just once in the response.

As can be seen in the chart, Go Overseas, Go Abroad, and Teen Life are the leading sites for paid online listings.



Future Recommendations

The above findings have led to several recommendations by the Research Committee as we look ahead to the next iteration of the survey in 2020. The categories below are directed towards critical stakeholders in the gap year field. It is our hope that this annual survey can drive momentum towards relevant concerns and the collective interest of the broader gap year field. We are grateful to each participating organization who spent the time to thoughtfully work through this survey as well as their dedication to collecting and reporting vital data to contribute to this growing field of research.

General

- Respondents to this year’s State of the Field survey included: gap year friendly high schools and colleges,⁵ gap year consultants and consulting organizations, work and volunteer placement facilitators,⁶ university-affiliated and independent formal gap year program providers, and a fully accredited associate degree program. In future iterations of the survey, it may be advisable to more clearly define the target population for the survey. Who do we want to be responding to this survey? And how should the survey be tailored to each specific interest group?
- The research committee recommends creating different survey questions for different types of organizations. The questions and data relevant to consulting organizations, for example, is not the same as providers (or of gap year friendly high schools). However, providing more focused questions for each interest group will broaden the voices contributing to this annual report.
- This year the survey was opened for reporting from early June to mid July. We would like to move this process earlier in the year so results of the report can be made public in early summer for the next iteration. Collecting and reporting data earlier in the year may be more difficult for those organizations who run programs on the academic calendar; however, it would benefit the gap year field to have results reported earlier in the year for overall momentum and messaging to the general public.

⁵ High schools and colleges who promote or encourage gap years but do not offer a program themselves.

⁶ Organizations that connect students with work and volunteer placements but do not offer a formal gap year program.

Gap Year Providers and Data Collection

- 29 of the 54 provider members of the GYA responded to the State of the Field survey. The research committee recommends that member organizations are contacted directly and followed-up with on several occasions to encourage more complete data on the state of the field in future years. These providers should be more motivated to participate but may need more direct encouragement to do so. Even just tracking data on member organizations over time would be incredibly useful for opportunities towards developing longitudinal data on the field.
- With the ever growing need for more data on the demographics of gap year participants, it is vital that organizations both collect and thoroughly report these numbers in the annual survey. We urge each institution to appoint a specific staff member to be responsible for this data collection process and be prepared to report by Spring of each year.
- We encourage programs to use a unified definition of how to determine low income status in their evaluation process of need based assistance. Perhaps this is also an area where the Gap Year Association can offer a model of best practice through the accreditation standards.

Gap Year Counselors/Consultants

- The Research Committee would like to talk to current gap year counselors and consultants about how to design the 2020 state of the field survey to include relevant questions and concerns specific to their interests. The committee believes this will strengthen the annual survey and give a broader view of the state of the field in future iterations.