



**Annual State of the Field
Counselor Report
2020**

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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.

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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. **This is the first year the survey has been customized to the specific interests of gap year counselors and independent college counselors.**

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 from previous years. Each annual survey serves as a snapshot of the 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.

Organization Information

The survey was distributed to a GYA database of 56 potentially eligible counselors. There were 14 respondents who all recognized themselves as either a gap year counselor or independent college counselor in the completion of this survey. All 14 respondents identified their headquarters in the United States. All 14 respondents are currently GYA members.

Staff

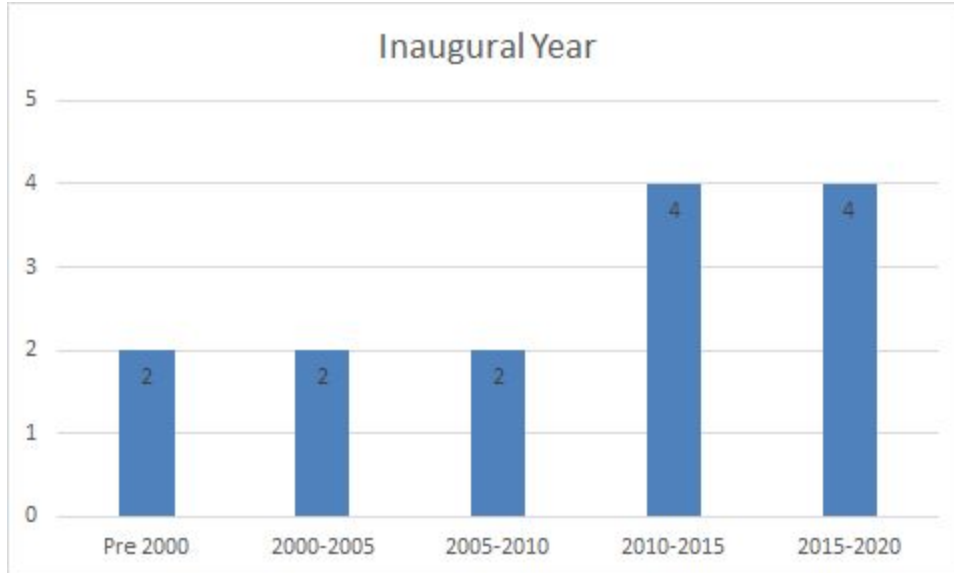
There were 14 respondents to questions related to staffing. There were a total of 14 full-time staff reported by 12 programs. 2 respondents did not have full-time staff (only part-time) and 2 respondents had 2 full-time staff. The other 10 respondents all had 1 full-time staff. These numbers did not change when asked if they were impacted by COVID-19.

There were a total of 12 part-time staff reported by 5 programs. The other 9 programs did not have part-time staff. There was a 17% decrease in part-time staff due to COVID-19 (from 12 to 10).

Each staff can go through an individual accreditation process with the GYA. Currently, there are a total of 7 accredited gap year counselors across 5 different organizations.

Inaugural Year

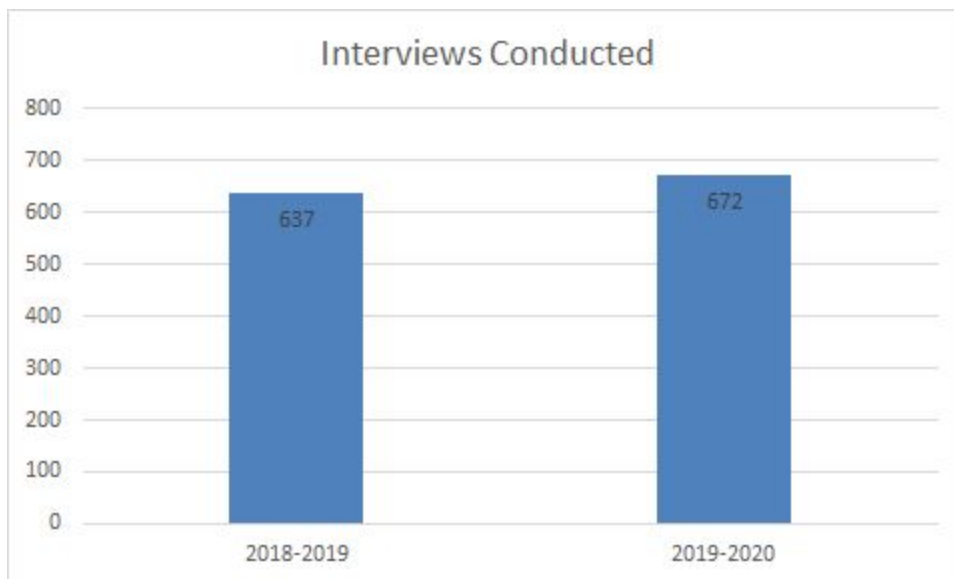
Respondents were asked when the first year was that they serviced a gap year client. **8 (57%) counselors began their services after 2010.** Further distribution of responses can be seen in the chart below.



Client Services

Interviews Conducted

Interviews are a common process by which gap year counselors begin to connect to potential clients. Interviews are generally a free initial consultation to genuinely interested gap year students and families. There were 9 respondents who reported the number of interviews conducted over the most recent business cycles. Only one respondent reported a decrease in interviews year to year. **From 2018-2019 to 2019-2020, there was a 9% average increase in interviews across all counselors.**



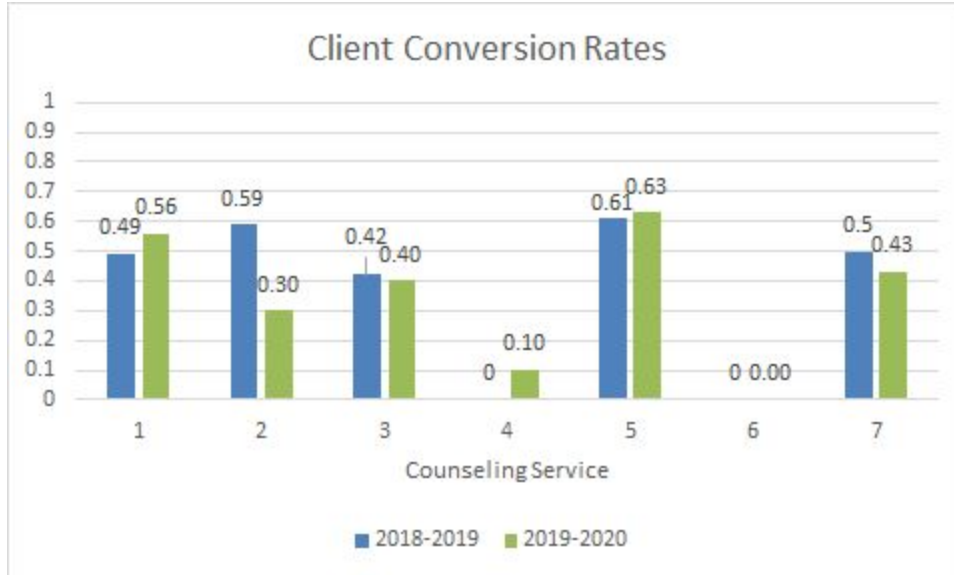
Gap Year Clients

There were 10 respondents who reported the total number of clients serviced. **There was no significant change (0.5% average decrease) in the total volume of gap year students serviced from 2018-2019 (381) to 2019-2020 (379) among counselors.**



Conversion Rates

There were 7 respondents who reported on both their total interviews and total clients serviced. With this information, we were able to calculate the conversion rate (total clients serviced divided by total clients interviewed). Three out of seven respondents had an increase in conversion rates year to year. **However, the average across respondents was a decrease of 3% from 2018-2019 (37%) to 2019-2020 (34%).**



Transition Services

There were 9 respondents who indicated they provide transition services. In this survey, transition service was defined as “any additional support provided immediately following a clients completion of their gap year experience.” There were 85 clients who utilized transition services in 2018-2019 and 64 clients in 2019-2020, an average decrease of 25% year to year.

Participant Demographics

Survey respondents were asked to report the demographic information of their Gap Year participants for the 2019-2020 year. While expansion and changes in the demographics section will be needed in the future, including more data and overall documentation of socioeconomic backgrounds, this year’s findings gave us a few noteworthy conclusions.

The first general conclusion is that Gap Year participants are mostly coming from public high schools, as opposed to private schools or other options. In addition, we found that out of the entire 2019-2020 Gap Year participants reported by the survey respondents, 8.8% attended some university or had college credit prior to starting their Gap Year Program. Our recommendations for future survey considerations are mentioned in the proceeding sections, but we intend to expand on our demographic collections for the benefit of the industry. Below are additional representations of the demographic information collected this year.

Nationality

Survey respondents declared that their participants were almost exclusively U.S. nationalities, with the exception of one respondent declaring that 11% of their participants were Canadian. In total, 96.3% of all declared responses were U.S. nationalities, with only 3.7% being Canadian.

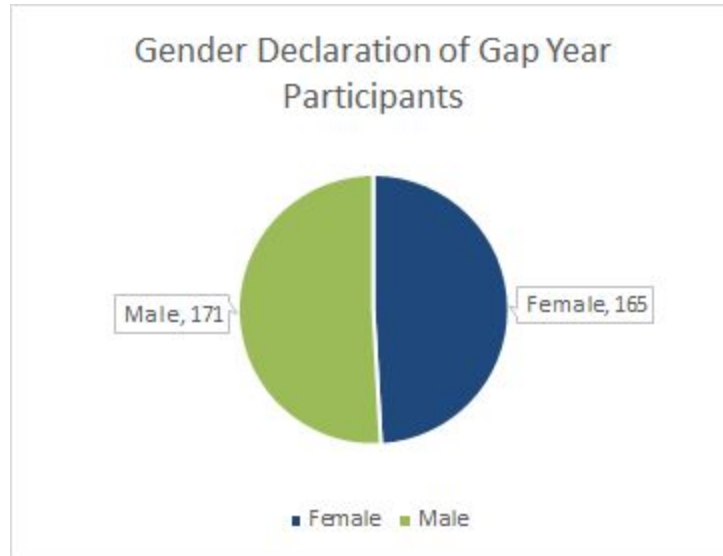


With most respondents operating in the United States, their participants seem to follow that trend as well. No other nationalities were reported.

Gender

With 64% of respondents declaring that they collect gender declaration data of their gap year participants, we have more than one third of the contacted participants reporting that they do not collect gender identification data of their program participants. In the future, we will want our participants to collect this information so our industry can continue compiling this insight.

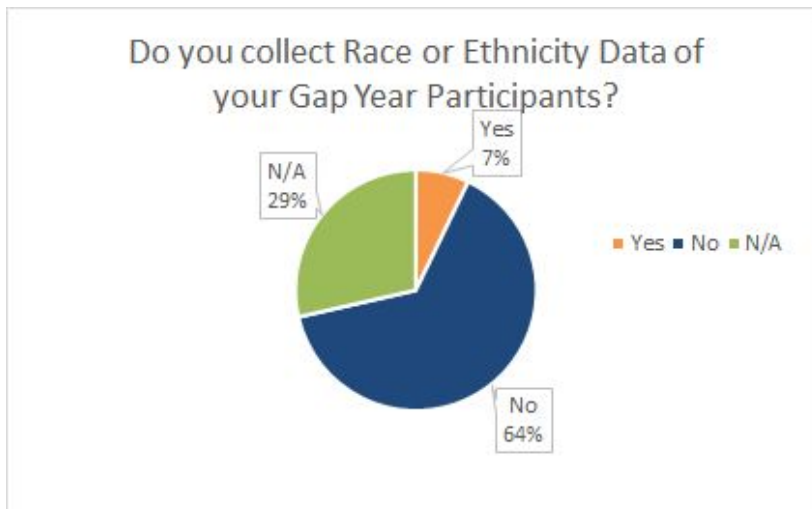
For the reported data regarding gender declaration of participants, we found that it was quite even with 171 reported as male and 165 reported as female. While there were three responses of "Other/Non-Binary" in the total of 239 Gap Year participants reported by the survey respondents, we see almost a balanced reporting of male to female participants.



There are no clear trends in male versus female Gap Year participants, but we recommend collecting more historical data from survey respondents to see if we can distinguish any changes. In addition, there is room for us to collect information about gender declarations between prospective and active participant clients.

Race & Ethnicity

Only one survey respondent declared that they do collect race and ethnicity information of their gap year program participants, with 60% plainly stating no and 27% giving no comment.

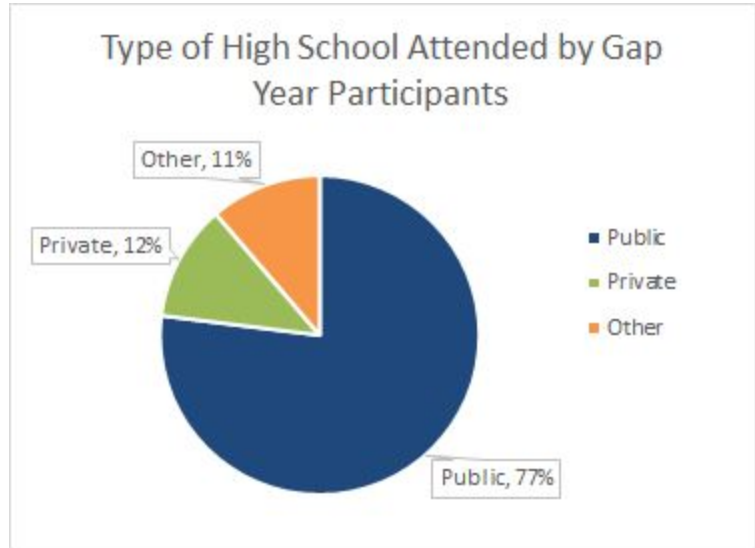


For the one survey respondent that did report Race & Ethnicity data, they found that 66% of their participants identified as White, while 16.7% identified as Black or African American and both Hispanic or Latino and Asian or Pacific Islander designations accounted for 8.3% each.

With more organizations collecting gender declarations as opposed to racial and ethnic identity information, more investigations will be needed to determine a more complete picture of our Gap Year participant backgrounds

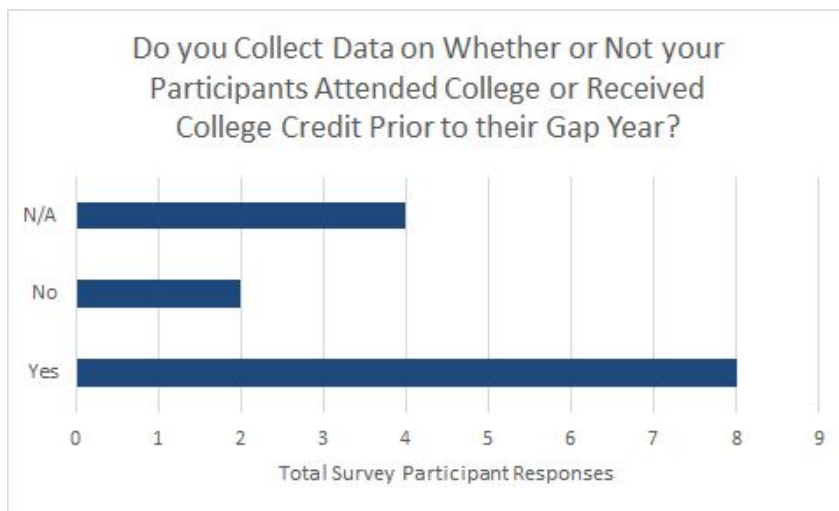
High School Education

With 42.9% of our respondents collecting high school information about their Gap Year clients, we found that the majority of their answers support the statement that Gap Year students generally come from public high schools. Carrying 77% of the total participants reported, our Gap Year respondents reported that the majority of their participants this year come from public high schools.



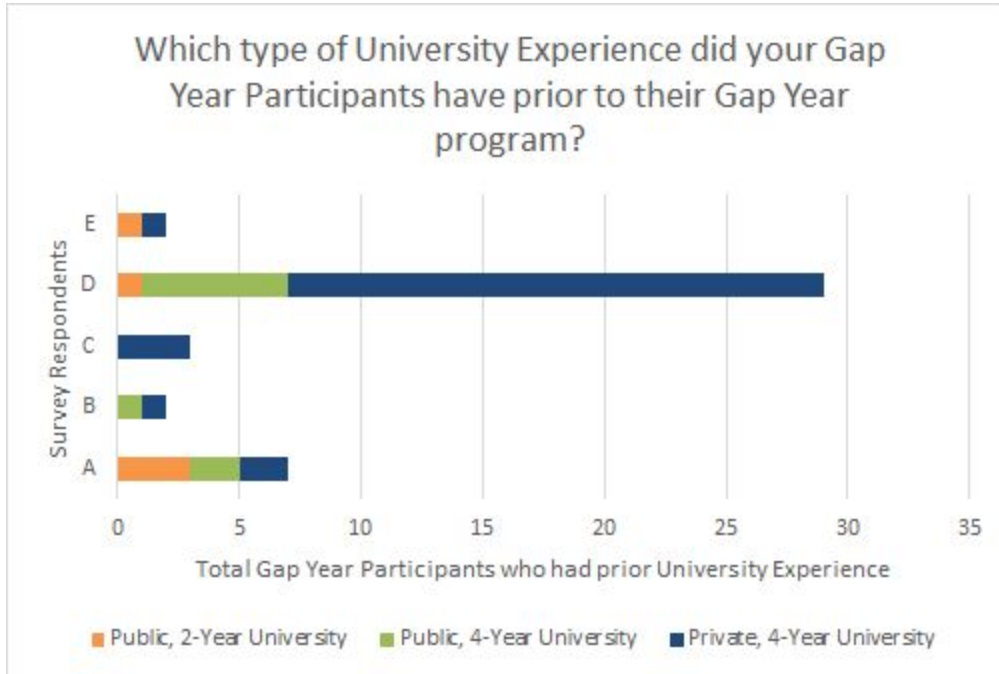
Pre-Gap Year University Experience

Our survey respondents were asked to provide information about their Pre-Gap Year university experiences their participants had. We found that eight of the 14 total respondents said they collected this data, while two did not and four did not provide an answer.



In the future, we will want all survey participants to provide an answer and also make it clear how they define these experiences.

Of the respondents who do collect data on whether their participants attended some university or had prior university credit, two reported that none of their Gap Year participants had this experience and one did not provide a response.



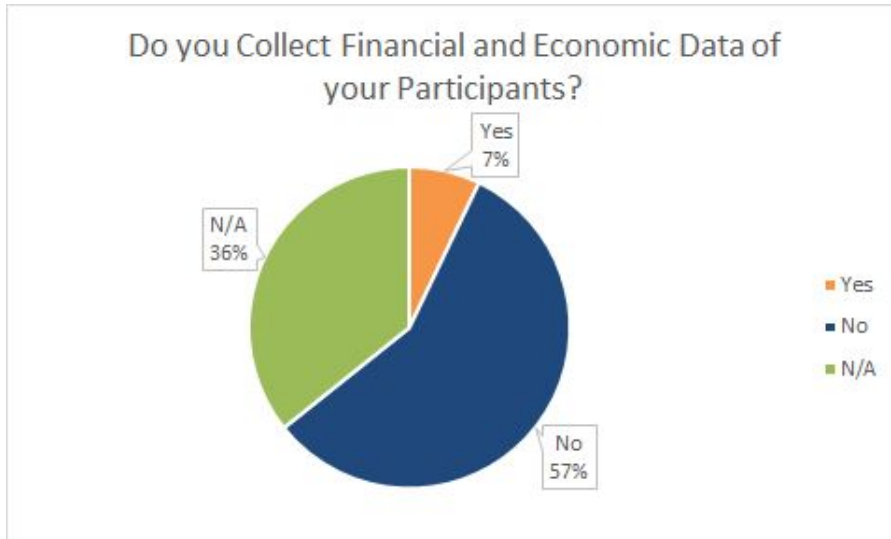
For the other five responses, they reported a total of 43 Gap Year participants who said that they had attended some university or had university credit. Of those 43 participants, they attended a variety of 2-year and 4-year public and private universities. The majority attended a private, 4-year university. In the future, we intend to ask participants to give more detailed information about the type of university credit their participants had earned.

Based on the reported total of 379 Gap Year clients serviced by the 14 participants in 2019-2020, that means almost 9% of these clients had some university experience or credit before starting their Gap Year program. In the future, we intend to collect more historical information to see if this trend of participants having prior university credit before starting their Gap Year program is increasing or decreasing

Financial/Economic Background

Only 7% of respondents collect economic or financial backgrounds of their Gap Year participants, with over half reporting that they do not collect this information. 36% of

respondents did not report any data regarding their actions of collecting financial and economic information about their participants.



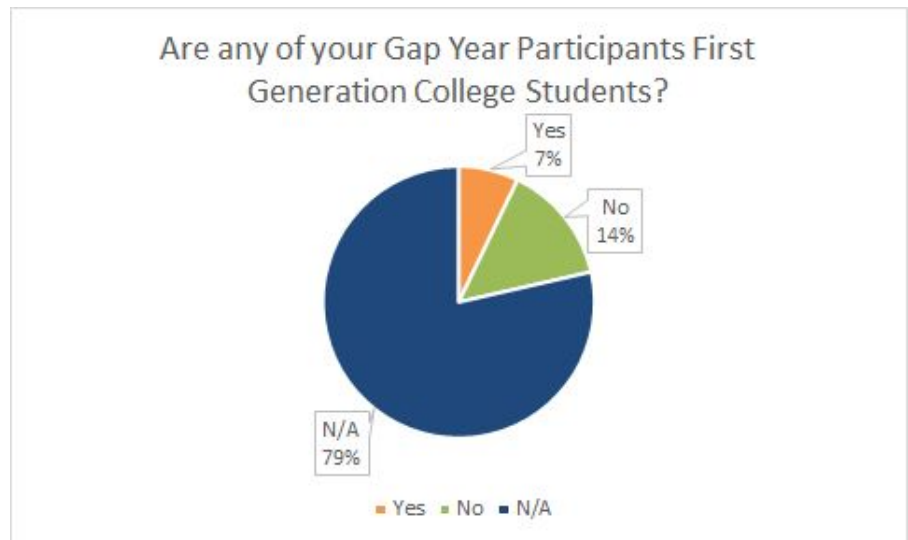
For the respondents that do collect financial and economic information about their Gap Year participants, they reported that their primary means of data collection is through parent responses.

Our respondents do not utilize household income, Pell grants, or

other economic indicators to determine the financial background of their clients. We believe this may be helpful to ascertain the financial backgrounds to understand more about the participants and better determine the economic conditions of the student leads compared to the student participants.

First Generation Status

79% of our respondents reported that they do not collect the first generation status of their Gap Year clients, yet of the remaining 21% that do collect it, only 1 respondent indicated that their organization had a first generation participant (in fact, they had two). Our recommendation is in the future, we understand more about how many



first generation students our participants engage with overall as leads, as opposed to only collecting information about their program participants.

Financial Assistance to Clients

The average cost of consulting services varied widely among survey respondents. However, of the ten respondents to this question, 50% of them had an average cost of between \$1,000 and \$2,000. Two, 22% charged less than \$1000 and three, 33% charged above \$2,000 with the maximum cost being \$2,800. It needs to be noted that not all respondents are providing the same service to clients so costs vary widely depending upon types of services being offered. For example, some respondents provide one time services while others provide lifetime services but only charge one fee.



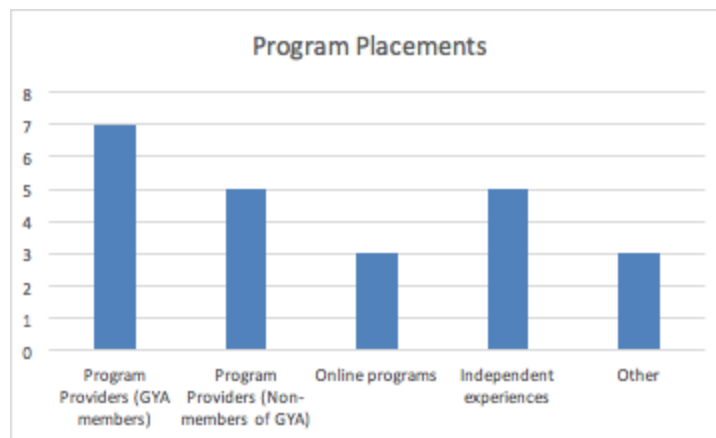
None of the counselors reported that they ask financial data on their clients although one did reply that their intake forms did allow students and parents to self disclose if they were low income. That said, five of the respondents did reply that they gave financial assistance to clients. 80% of those respondents said that they give financial assistance to 10% or fewer of their clients.

The total amount of financial assistance given by the five respondents who disclosed was \$26,500; more than half of that coming from a single source. An additional respondent reported offering scholarships that were never used.

Gap Year Program Features

All survey respondents wrote that semester options for students were the most popular among their clients. Students and families were less interested in academic year or summer options.

Survey respondents said that they placed clients in a variety of programs. All seven who responded said that they placed clients with accredited GYA program providers. For those who listed “other,” they mentioned placing clients in foreign universities, foreign work exchanges or with the conservation corps.



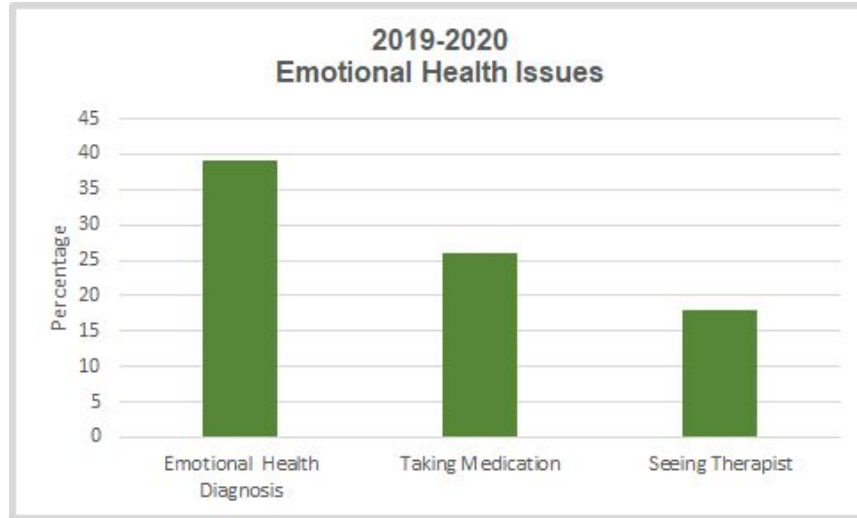
For program locations, Latin America seemed to be the most in demand, followed by Europe and Southeast Asia in terms of number of mentions. The question did ask consultants to prioritize the top three choices in order of demand. However, the way that some respondents answered made it impossible to weigh the responses in a consistent way. However, if we were able to apply a standard weighting system to responses, Latin America would again have stood out as the priority location of interest to clients. In future years, this survey question will be changed so that more comparable data can be collected.



When asked if there were preferred locations that are lacking viable gap year options survey respondents replied that better US options were necessary, including US programs that were “less outdoorsy.” Many of the comments requesting more US programs may be a result of the COVID pandemic and less about long term student interest. Among international destinations, Scandinavia, Iceland, affordable European options, West Africa, and Japan were suggested.

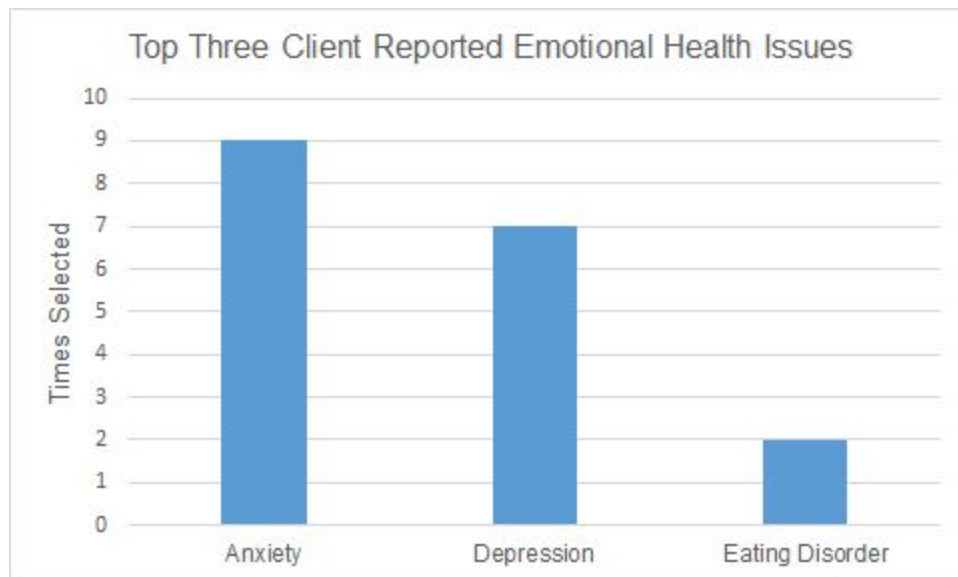
Emotional Health

Survey respondents were asked to share data on the percentage of clients with an emotional health diagnosis, the percentage of clients seeing a therapist on a regular basis, and the percentage of clients taking medication related to emotional health issues. 7 respondents shared enough data to calculate percentages of clients with an emotional health diagnosis. 6 respondents shared enough data to calculate percentages of clients taking prescribed medications for emotional health issues and clients seeing a therapist on a regular basis. Nearly 40% of gap year clients reported an emotional health diagnosis; 26% have been prescribed medications; and 18% see therapists on a regular basis.



Top Three Emotional Health Issues

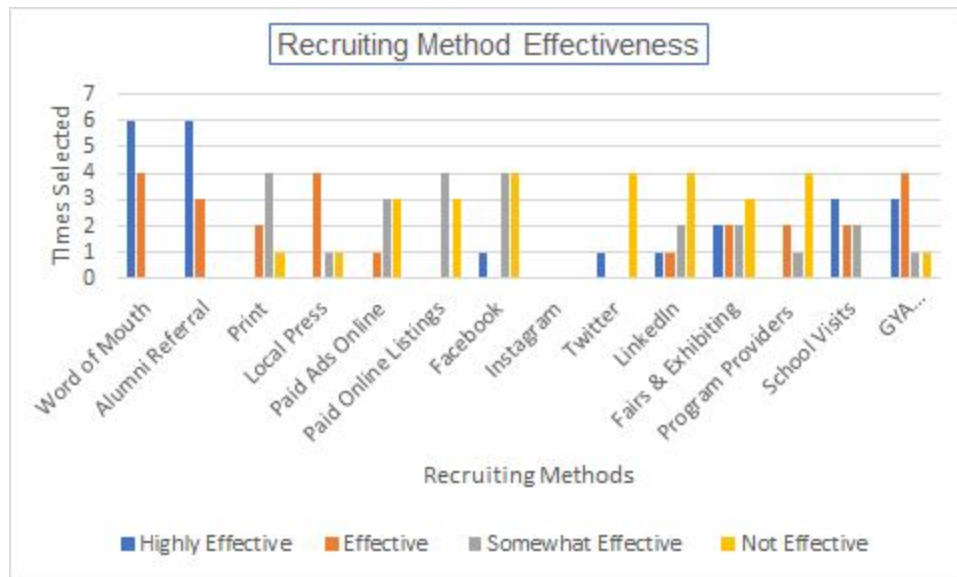
Respondents were asked to identify the top three emotional health issues identified by their clients. Anxiety was ranked the highest by 9 survey respondents; depression ranked the second highest by 7 survey respondents; and eating disorder ranked third highest by 2 respondents.



Marketing

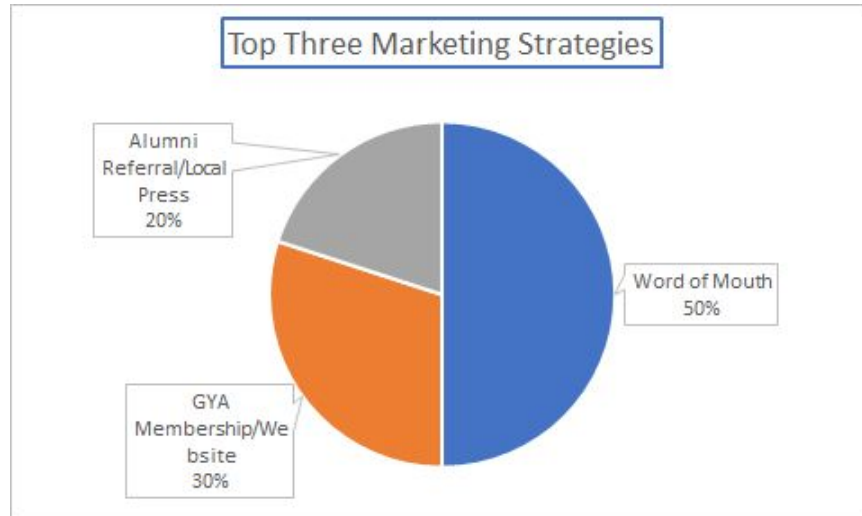
Effectiveness of Marketing Methods

Survey respondents were asked to rank the effectiveness of identified marketing methods in recruiting clients on a scale from 1 to 4 (1 not effective, 2 somewhat effective, 3 effective, and 4 highly effective) and to indicate "we don't use this method" for methods they do not use. Of the 10 responses, word-of-mouth referrals and alumni referrals tie for the most effective marketing methods currently in use.



Top 3 Marketing Strategies Currently in Use by Gap Year Counselors

Respondents were asked to rank from most to least, the TOP THREE marketing strategies they are currently prioritizing. Interestingly, word-of-mouth ranks highest with 50% followed by GYA membership/website at 30% and Alumni Referral and Local Press tied at 20%.



Other Types of Marketing

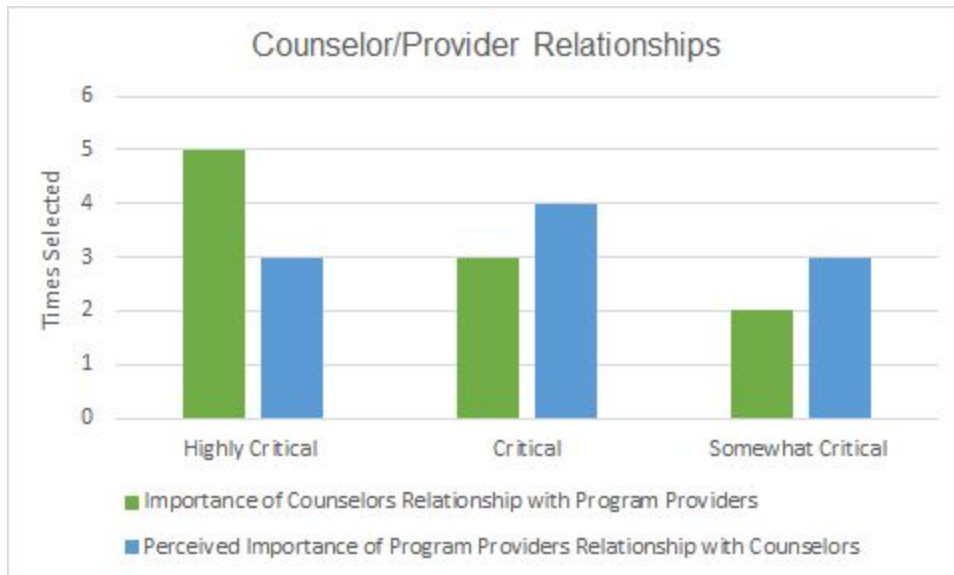
Survey respondents were asked to identify other types of marketing they are currently using and instructed to indicate n/a if no other strategies are currently being utilized. Five survey respondents reported using other types of marketing strategies that include: postcard mailings; speaking engagements; free webinars; national press; podcasts; email marketing; marketing to educational consultants and school counselors. Five respondents reported they did not use other marketing strategies.

Paid Online Listings

Respondents were asked to identify paid online listings where they currently advertise their organization and instructed to note n/a if this marketing strategy is not currently being utilized. Six respondents reported advertising on Facebook, Teenlife, consultant associations, and local school directories. Four respondents indicated n/a indicating that they did not use paid online listings as a marketing tool.

Importance of Counselor/Program Provider Relationship

Survey respondents were asked to rank the importance of their relationship with program providers and how critical they perceive program providers view their relationship with them. Of the 10 respondents, 50% feel their relationship with program providers is highly critical, 30% critical, and 20% somewhat critical. In contrast counselors perceive program providers rank their relationship with counselors differently, 30% feel providers view their relationship with counselors highly critical, 40% critical, and 30% somewhat critical.



Impact of Online Gap Year Planning Guides

Respondents were asked to describe the impact on business by the presence of online gap year planning guides, both on the GYA website and individual program provider websites. Of the five respondents, 1 reported the impact as very positively, 1 very negatively, and 3 as neutral.

Additional Concerns

Gap Year Association Activities

Survey respondents were asked to identify the three Gap Year Association activities that matter most to their organization by selecting only 3 from a list of 12 identified activities. The GYA activities that matter the most to gap year counselors are: Accreditation & Standards: Programs & Counselors; GYA Weekly Forums; and Conference (best practices, networking).

Broader Industry Concerns

Survey respondents were asked to select the most important current gap year industry-wide concerns from a list of 5 identified concerns and to add 'other' if applicable. Of most importance is ensuring accessibility and inclusivity through more

financial aid to gap year students. Next with equal importance is mental health support for students and training for in-country staff to help manage mental health on-the-ground and the lack of support from schools (high schools and colleges) because of insufficient knowledge and understanding of gap year programs and their positive impacts.