# Annual State of the Field
# Program Provider 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.

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.

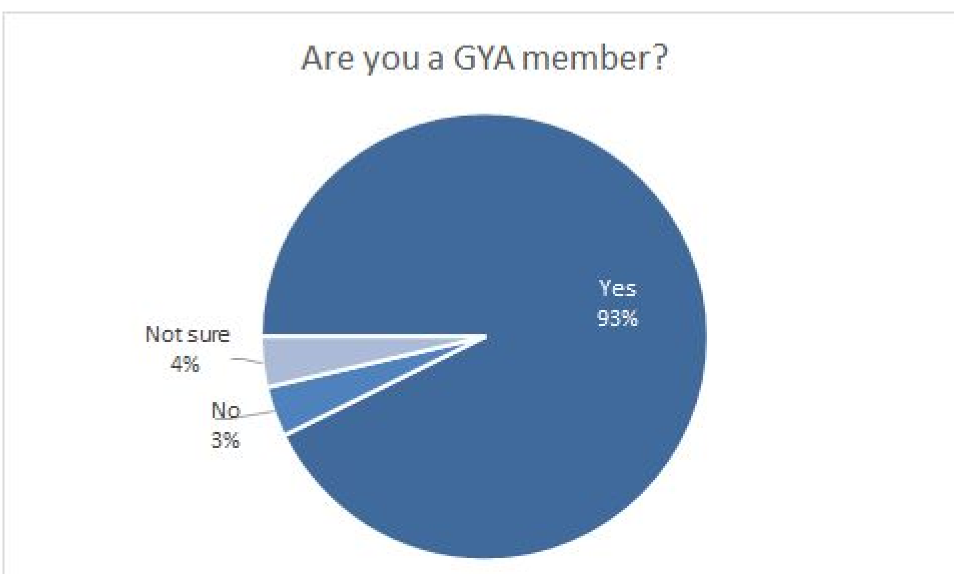
## Organization and Program Information

*Eligibility and Response Rates*

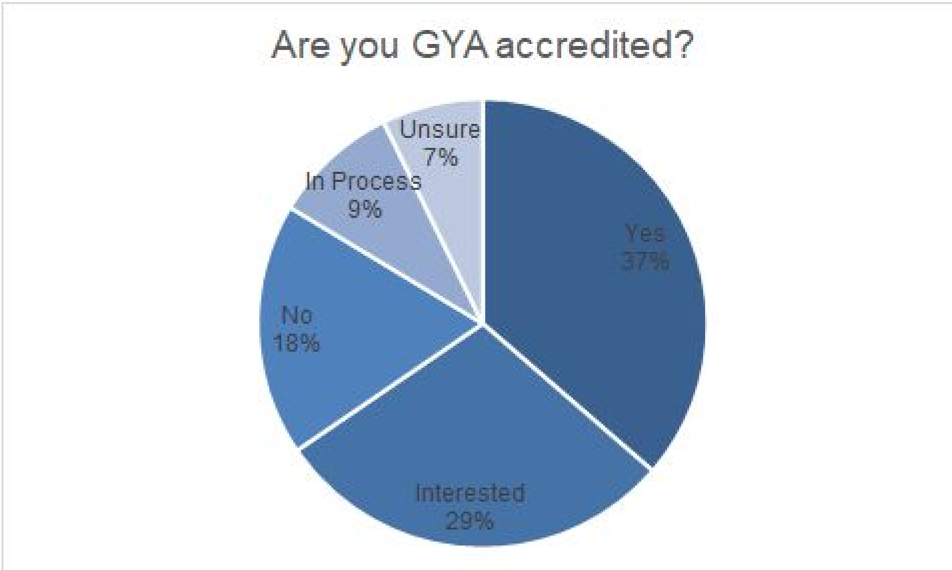
The survey was sent to all GYA provider members (75) as well as distributed through the GYA newsletter to a broad database that includes members and non-members. Since the survey is sent to a broad audience, it is difficult to offer a true response rate for this particular survey beyond those who are GYA provider members. However, a total of 55 organizations answered enough questions to be considered complete for the purposes of the survey. 80% (44) of the respondents completed the survey beyond the organizational and program information page. The survey is designed to allow respondents to skip over any questions; therefore, each question may vary in response rate since it was not mandatory to answer every question.

*Membership and Accreditation*

GYA membership is offered to program providers through an application process. Out of 55 respondents, 51 (93%) identified as GYA members, 2 (4%) were not members, and 2 (4%) were unsure. At the time the survey was administered, there were 75 GYA Provider members. Thus, **the initial response rate for GYA provider members was 68%.** There were two members who reached out through email communications and said they would not be filling out the survey since they have yet to host any gap year programming. Thus, some GYA Provider members are unable to participate in this survey due to having no data to offer.

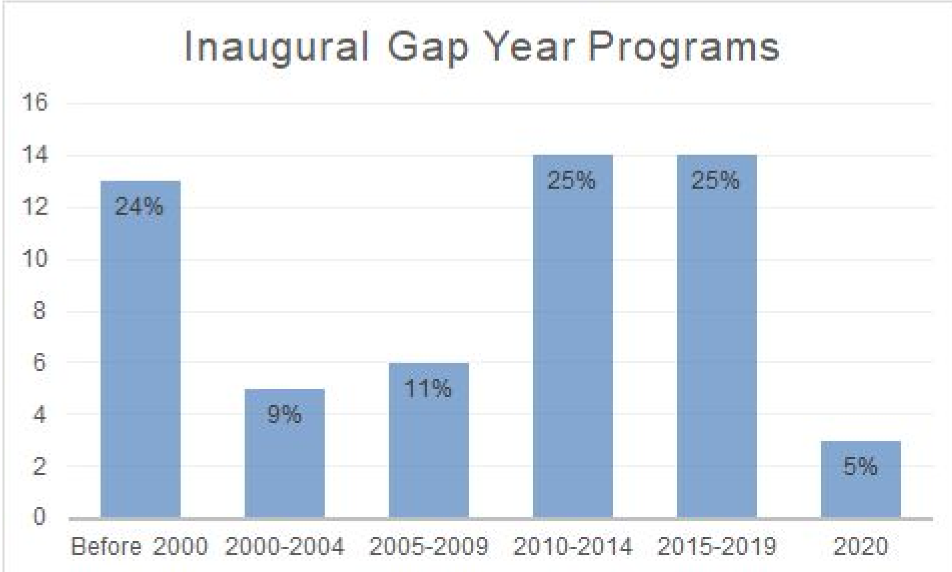


GYA accreditation is a more rigorous process in which a program provider goes through a "comprehensive evaluation of safety and pedagogy." When asked "Are you accredited?", the breakdown is as follows: 20 (37%) "Yes",16 (29%) "Interested", 10 (18%) "No", 5 (9%) "In Process", 4 (7%) Unsure.



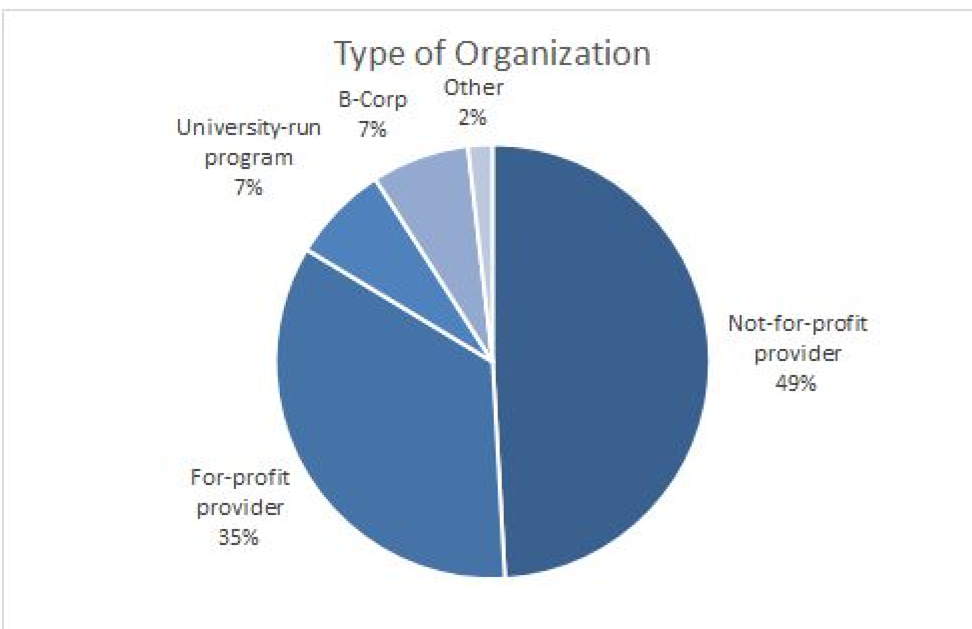

*Inaugural Gap Year Program*

Respondents were asked in which year they operated their first gap year programs. 55 organizations responded with the breakdown as follows: 13 (24%) before 2000, 5 (9%) between 2000-2004, 6 (11%) between 2005-2009, 14 (25%) between 2010-2014, 14 (25%) between 2015-2019, and 3 (5%) had their inaugural year in 2020. **55% of organizations reported their inaugural year in 2010 and beyond.**




*Organization Type*

There were 55 respondents to this question. The breakdown of types of organizations is as follows: 27 (49%) Not-for-profit provider, 19 (35%) For-profit provider, 4 (7%) University-run program, 4(7%) B-Corporation, 1 (2%) Other.

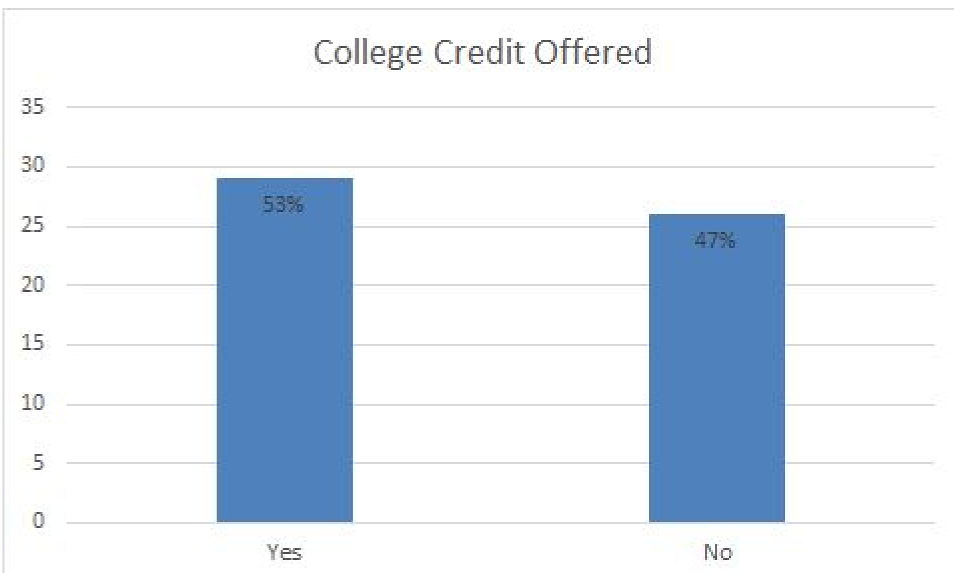


*Headquarters*

Out of 55 respondents, there were a total of 14 countries represented. The breakdown of the location of program headquarters is as follows: United States 32 (58%), United Kingdom 6 (11%), South Africa 3 (5%), China 2 (4%), Costa Rica 2 (4%), New Zealand 2 (4%), Canada 1 (2%), India 1 (2%), Ireland 1 (2%), Israel 1 (2%), Italy 1 (2%), Portugal 1 (2%), Spain 1 (2%), and Taiwan 1 (2%).

*College Credit*

Out of 55 respondents, 29 (53%) programs offer college credit while 26 (47%) programs do not offer college credit. However, 10 of the programs who do not provide college credit indicated that some of their students receive credit through their personal affiliations with a university.

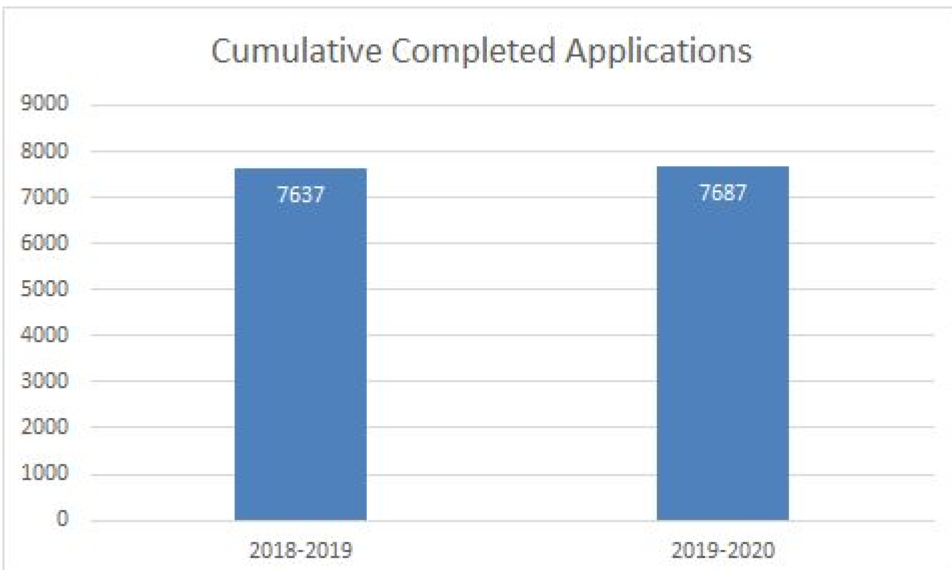



Programs listed the following institutions as either a school of record or accrediting body: American University, American Jewish University, Beacon College, Central Wyoming College, Clark University, Dickinson College, Guangxi Normal University, Mercyhurst University, Naropa University, Northland College, Portland State University, Seattle Central Community College, Tufts University, University of Maine-Farmington, University of Minnesota, University of North Carolina-Chapel Hill, University of Utah, Western Colorado University.

## Admissions and Enrollment Trends

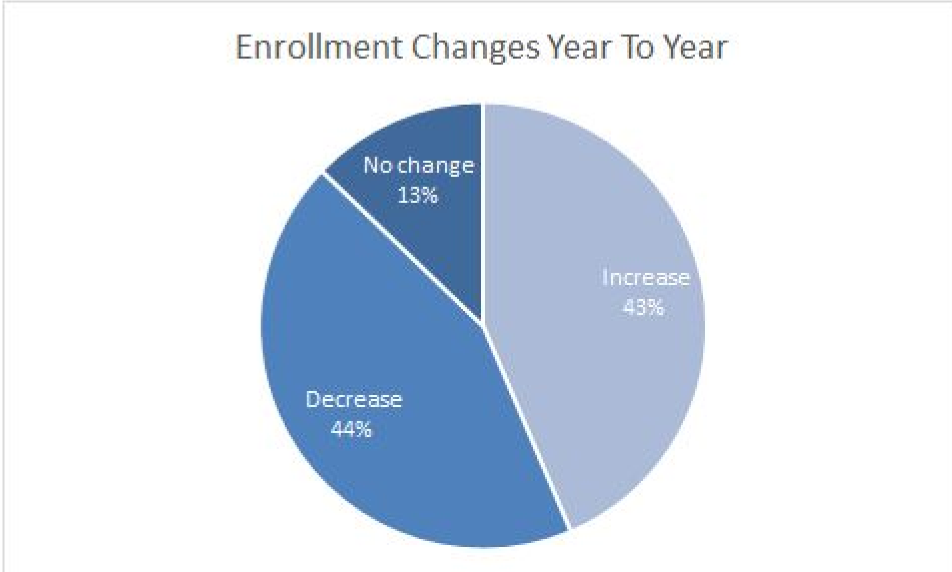
*Completed Applications*

A new question in this year's survey asked programs to report how many applications were completed. It is a helpful piece of data to collect in order to recognize overall gap year interest and to calculate acceptance rates. 35 respondents completed these questions. The cumulative number of applications completed in 2018-2019 was 7,647 as compared to 7,687 in 2019-2020. Thus, **the total completed applications across all respondents did not show a significant change in gap year interest expressed year over year (roughly 0.6% increase)**. Additionally, it should be noted that the survey does not collect data on whether students applied to multiple programs so we are unable to determine if these numbers all represent unique individuals.

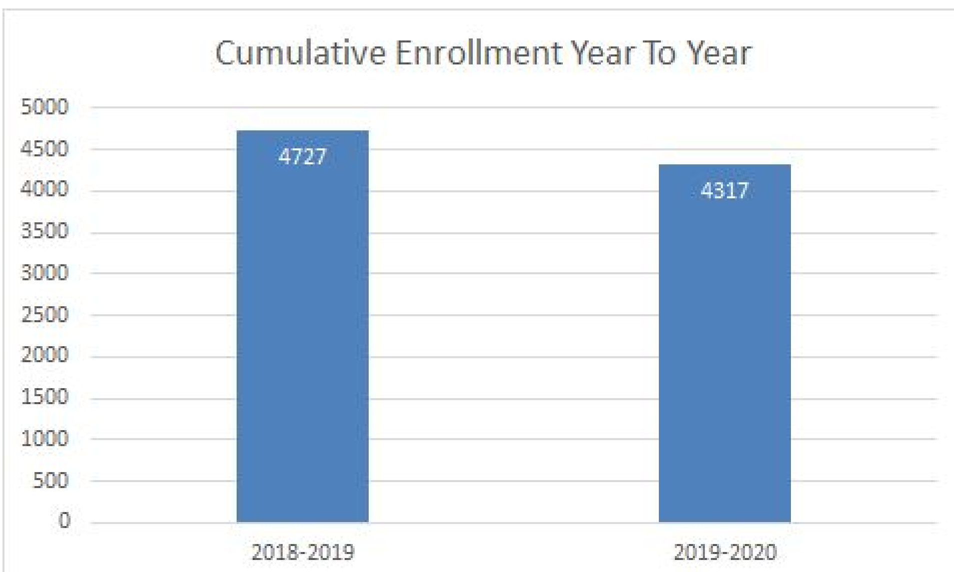



*Enrollment Trends*

There were 39 respondents who reported enrollment numbers comparing 2019-2020 to 2018-2019. 17 (44%) programs reported an increase, 17 (44%) programs reported a decrease, and 5 (13%) programs reported no changes year-to-year.

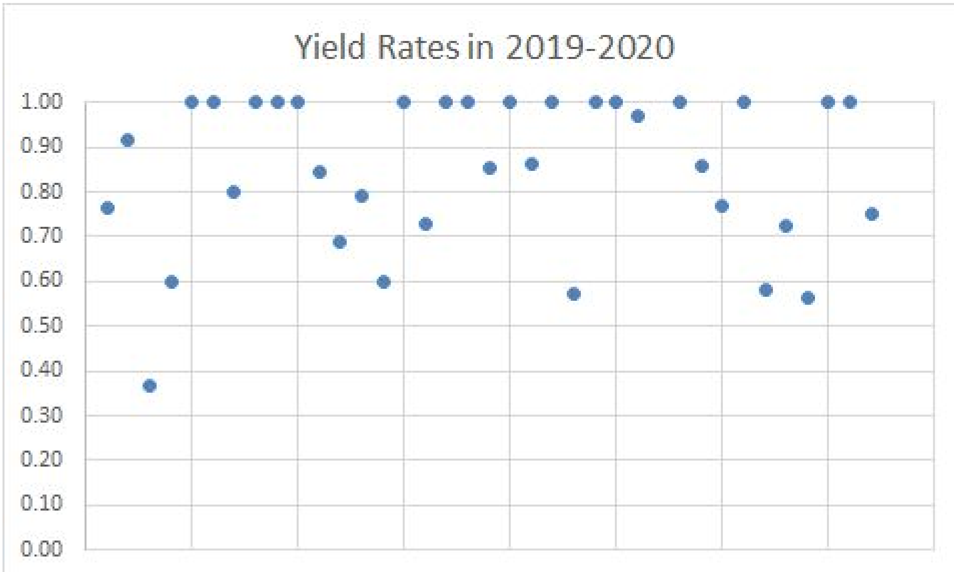



**The cumulative enrollment of all programs reporting data for both years shows a 9% decrease from year to year.** In 2018-2019, the total was 4,727 students who participated in programs. In 2019-2020, the total was 4,317 students. Reasons for this decrease can be further illuminated by looking at yield rates, as we will see below.




*Yield Rates*

This year, for the first time, yield rates (total enrolled students divided by total admitted students) were calculated in order to gain a closer look at trends in the decision-making process of student commitment. There were 33 respondents that reported their data on admitted students and enrolled students. Below is a chart to demonstrate variance among programs, with each dot representing the yield for the individual programs reporting yield data. **In 2019-2020, yield rates per program range from 37% to 100%.**

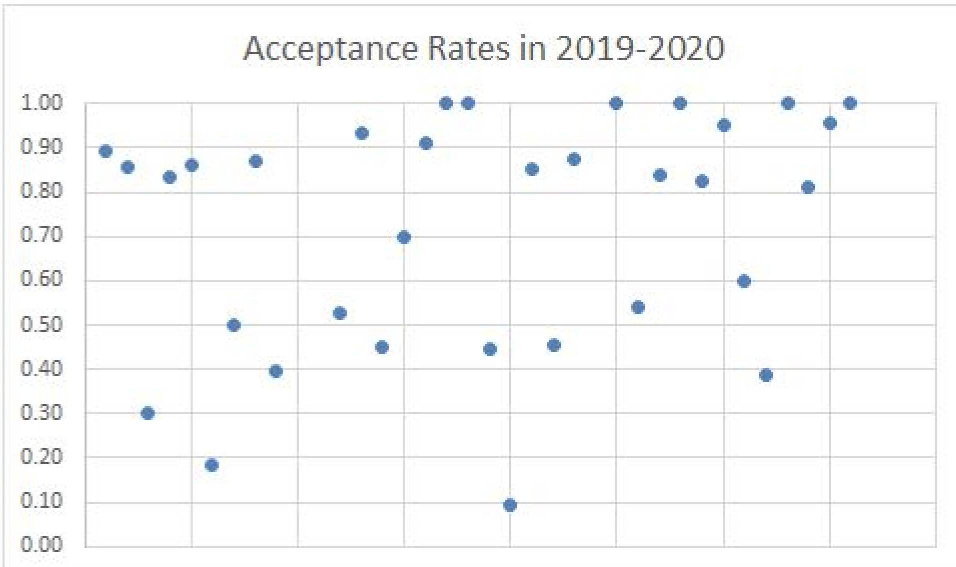



When looking across all 33 reporting programs, **the average yield rate for 2019-2020 was 84% compared to 90% in 2018-2019.** Here we find an average overall 6% decrease in converting admitted students into enrolled students. This finding may suggest that while gap year interest (completed applications) held relatively steady year-to-year, enrollment was down this past year due to a decrease in gap year commitment once accepted to the program. It might also suggest that students are applying to multiple programs, and, thus, once admitted, must choose among several options. However, this survey does not collect data on whether students are applying to more than one program. Programs should consider what factors may have contributed to a decrease in converting admitted students to enrolled students during this program cycle.

*Acceptance Rates (Selectivity)*

This year for the first time, acceptance rates (total admitted students divided by total completed applications) were calculated in order to gain a better sense of the selectivity of getting admitted to a program. 33 respondents that reported their data on completed applications and admitted students. Acceptance rates are best viewed in terms of individual programs. Below is a chart to demonstrate the variance among programs. In

2019-2020, acceptance rates per program range from 10% to 100%. **9 (27%) programs had acceptance rates lower than 50%**, suggesting there are several programs that have a highly competitive admissions process. However, **20 (61%) programs had acceptance rates above 80%** which suggest there are many programs that are highly accessible to gap year applicants.



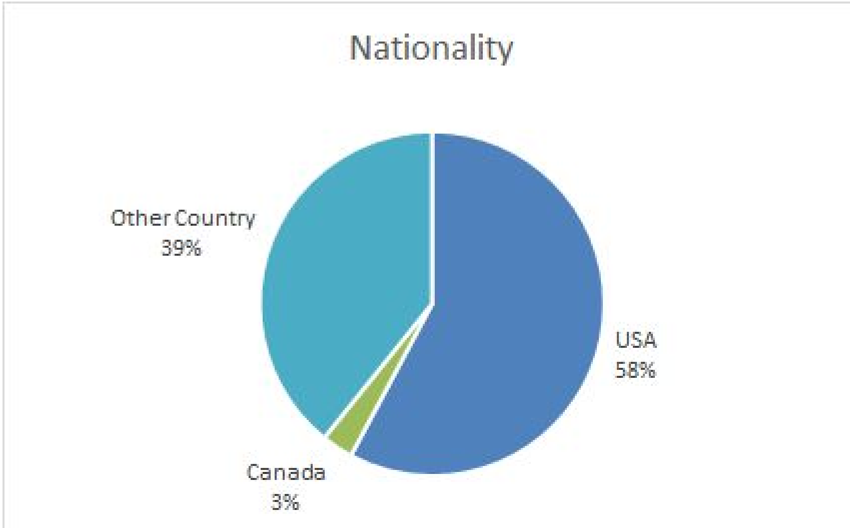

When looking across all 33 reporting programs, **the average acceptance rate was 57% in 2019-2020 compared to 59% in 2018-2019.** While it is preferable to focus on individual programs in assessing acceptance rate, we find it at least helpful to calculate an industry average since this is not a data point that has been considered to date.

## 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.

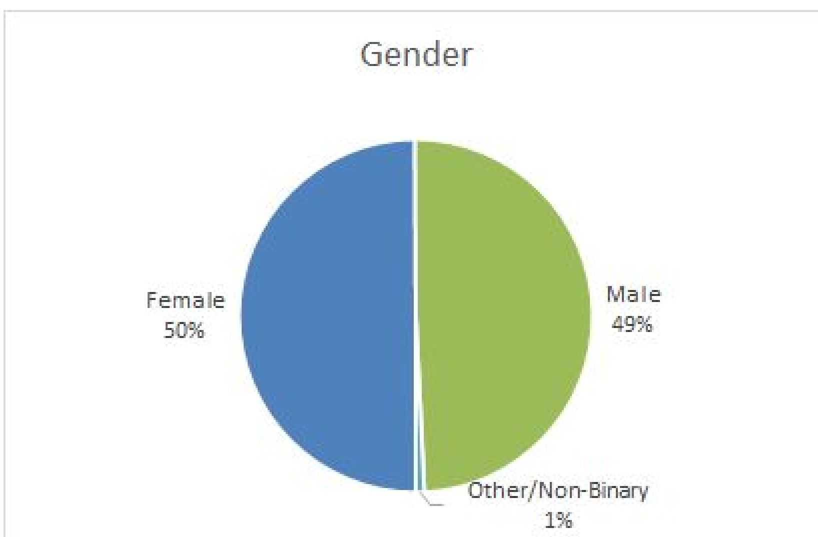
*Nationality*

There were 31 programs that provided this data. The nationality of students who participated in these programs is as follows: USA (58%), Other Country (39%), Canada (3%).



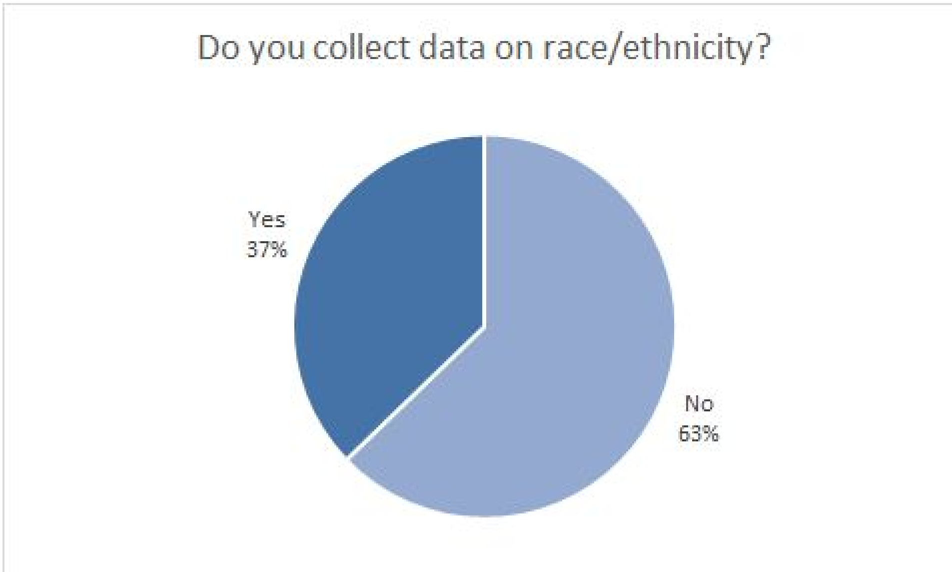

*Gender*

There were 35 programs that provided this data. The gender of students who participated in these programs is as follows: 2469 (50%) female, 2438 (49%) male, and 38 (1%) other/non-binary. It should be noted that two outlier organizations reported significantly stronger male to female ratios. When these outliers are taken out of the data set, averages shift more strongly towards female (58%) to male (42%) to other/non-binary (1%) over all programs.

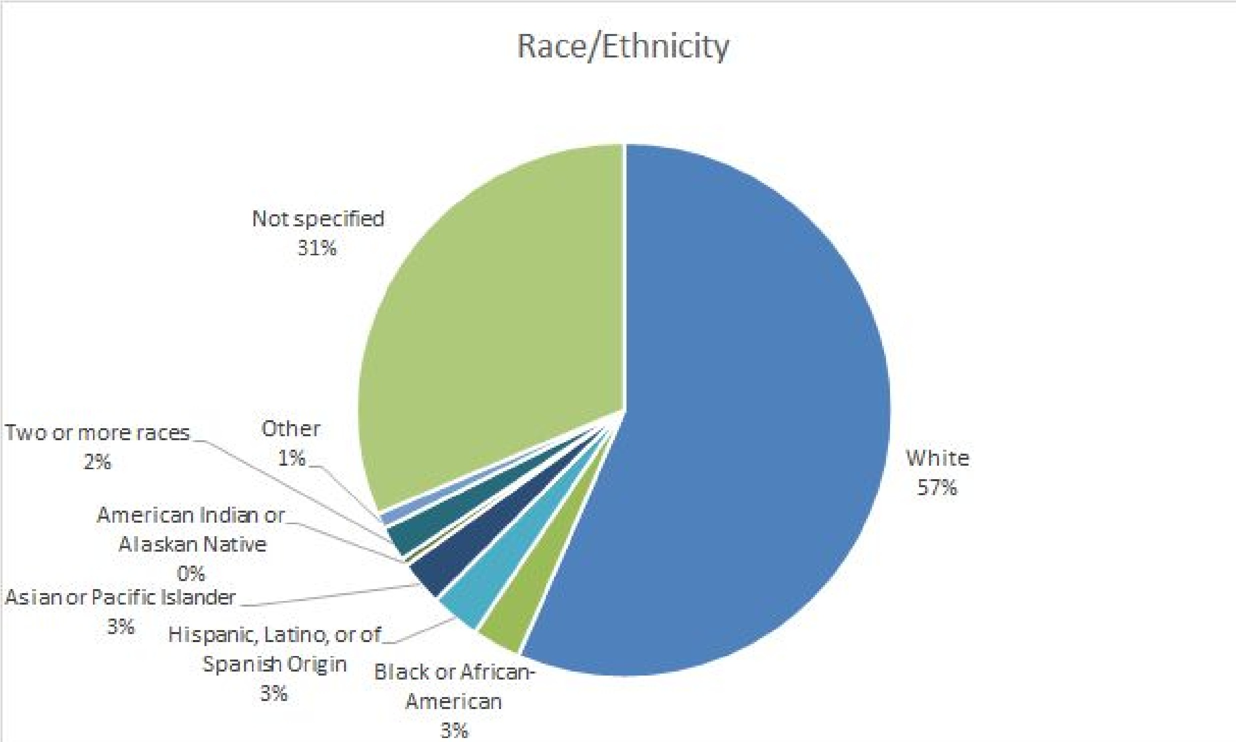


*Race/Ethnicity*

**27 (63%) programs said they do not collect this data. 16 (37%) said they collect this data.** As GYA continues to evaluate progress related to diversity, equity, and inclusion, it will be critical for GYA members to collect this data on their participants.

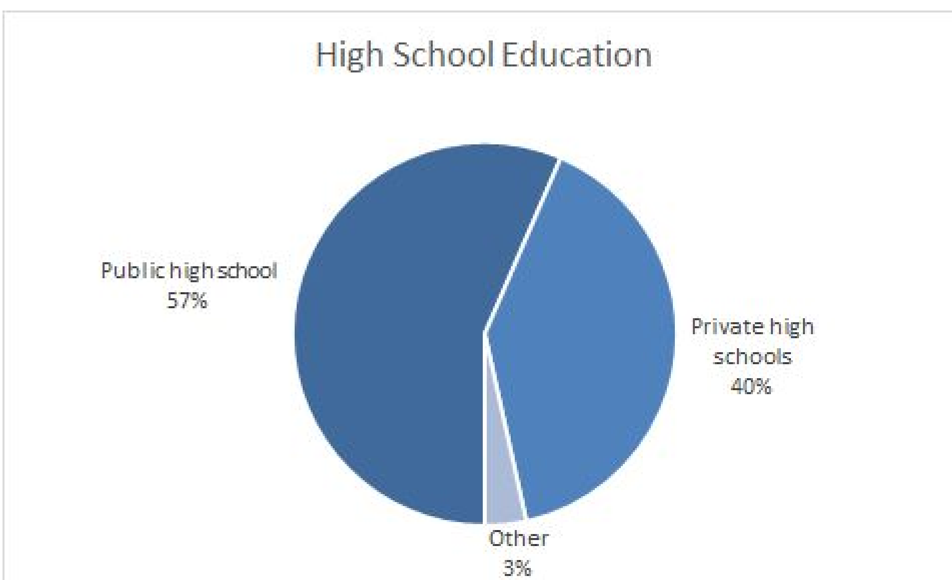



The results are as follows for the 16 programs that collect data on race/ethnicity: 1442 (57%) White, 77 (3%) Hispanic, Latino, or of Spanish Origin, 75 (3%) Black or African-American , 69 (3%) Asian or Pacific Islander, 54 (2%) Two races or more, 24 (1%) Other ,12 (0.5%) American Indian or Alaskan Native, 800 (31%) Not specified.




*High School Education*

10 programs indicated they collect this data. 31 programs indicated they do not collect this information. For the programs that collect this data, the breakdown of their students attending high school education is as follows: 244 (57%) Public, 173 (40%) Private, 15 (3%) Other.



*Pre-Gap Year College Experience*

13 out of 41(32%) programs said they had students attend college prior to arriving on their gap year. There were a **total of 74 students recognized as having pre-gap year college experience.**

*Low-Income Students*

10 out of 31 (32%) programs who reported this data said they had low-income students attend their programs. There were **a total of 170 students recognized as having low-income status**, most commonly determined by organizations using Pell grant eligibility, Expected Family Contribution (or "EFC" from FAFSA), and/or household income.

*First-Generation Status*

Two organizations reported **a total of 43 students who have first-generation status**. 28 organizations indicated they do not collect this data. A first generation student was defined as "students whose parent/s have not completed a 4-year college degree. In two-parent families, it must be true that neither of the students' parents or guardians completed a four-year degree in order to be considered first-generation."

*Diversity, Equity, Inclusion and Access (DEIA)*

In 2019, GYA offered members a self-assessment tool "to encourage Gap Year Provider members of GYA to reflect and improve on their DEIA practices in seven key areas." **Nine organizations indicated they had taken the DEIA assessment in 2019.** When asked if they would be willing to take the assessment in 2020, 12 organizations said "Yes", and an additional 21 organizations said, "I'm not sure - please send additional information."

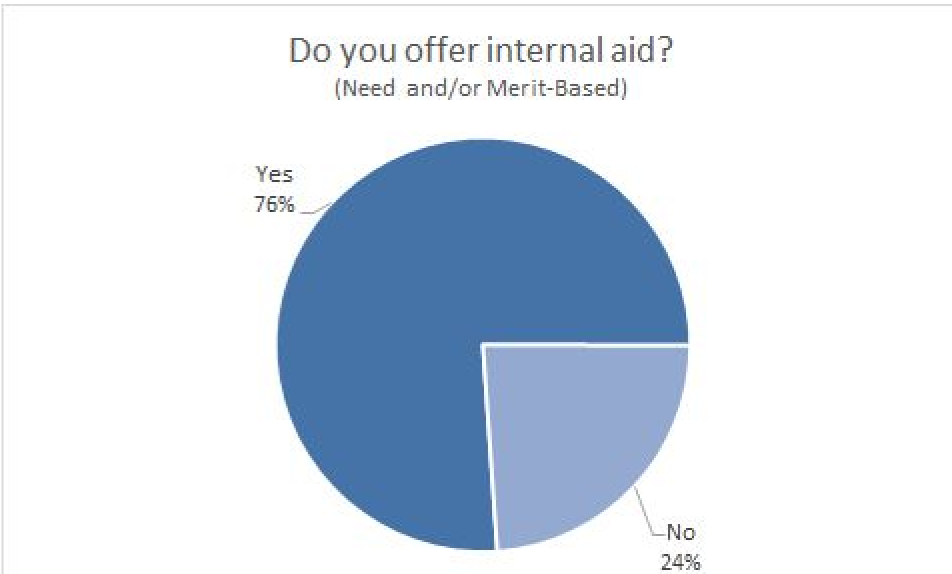
## Financial Assistance for Participants

*Federal Aid*

Although some gap year programs meet the eligibility requirements for its students to receive Title IV federal aid, virtually no providers were aware of how many students actually received it. As a result, we have no meaningful data to report here.

*Total Internal Aid*

In the survey we asked programs to provide information about total aid offered, then separate categories for need-based aid and merit-based aid. Of the 42 programs that provided some form of financial assistance for 2019-2020, 32 programs (**76%)** offer need-based and/or merit-based assistance, and 10 programs (**24%)** do not offer either.




Within the group of gap year providers who provide some financial assistance, there is a wide range in the percentage of students in each program receiving that assistance, as shown in this table:

| Percent of participants receiving assistance | Number of providers at this level |
|---|---|
| <10% | 11 |
| 11-25% | 8 |
| 26-50% | 2 |
| 51-75% | 2 |
| 76-100% | 3 |

For the 23 gap year providers who provided average award amounts for 2019-2020, **the average total amount of need- and/or merit-based assistance offered to their**

**students was $7091.** There is, however, a wide range of average total assistance offered, as shown in this table:

| Average total financial assistance | Number of programs at this level |
|---|---|
| <$1000 | 8 |
| $1001-2500 | 2 |
| $2501-5000 | 9 |
| $5001-7500 | 2 |
| $7501-10,000 | 2 |
| >$10,000 | 3 |

*Need-Based Assistance*

A total of 22 gap year programs provided need-based financial aid in 2019-2020, or 69% of the programs reporting their financial assistance data, and 13 of them did so exclusively, with no merit-based assistance. This table shows the number of programs providing need-based aid at various percentage levels of their total enrollment:

| Percent of participants receiving need-based assistance | Number of programs at this level |
|---|---|
| <10% | 9 |
| 11-25% | 5 |
| 26-50% | 3 |
| 51-75% | 1 |
| 76-100% | 3 |

The 479 participants who received need-based aid received **a total of $5,195,520 in financial assistance** from the 16 programs that reported their total need-based aid, for **an average award of $10,847 per participant.**

*Merit-Based Assistance*

A total of 13 gap year programs provided merit-based financial assistance in 2019-2020, or 41% of the programs that reported their financial assistance data, and five programs did so exclusively, with no need-based aid. This table shows the number of programs providing merit-based assistance at various percentage levels of their total enrollment:

| Percent of participants receiving merit-based assistance | Number of providers at this level |
|---|---|
| <10% | 4 |
| 11-25% | 5 |
| 26-50% | 2 |
| 51-75% | 1 |
| 76-100% | 0 |

The 165 participants who received merit-based aid received **a total of $459,000 in financial assistance** from the 10 programs that reported their total merit-based assistance, for an **average award of $2782 per participant**.

## Gap Year Program Features

On the 2020 survey, we added several questions related to the kind of programs offered by providers in the field. We asked questions related to program length, program cost, and program location/s. The section below summarizes data from the 35-40 organizations that provided responses to these questions. Our goal was to gain a better understanding of the most common and most popular types of programs currently being offered in the field. The findings should be understood with the awareness that, with only 35-40 providers responding, we cannot be certain that these data are representative of all providers.

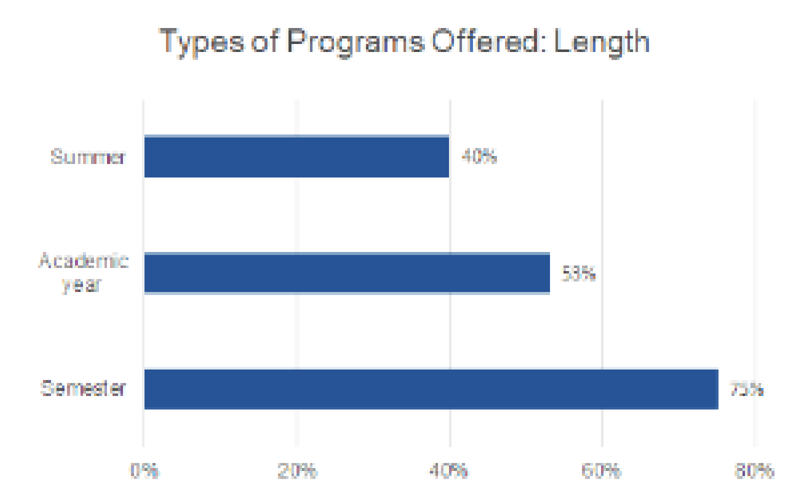
*Program Length*

We asked providers two questions related to program length.

*Q1: Which of the following gap year program options did your organization offer during the 2019-2020 program cycle? Please check all that apply.*

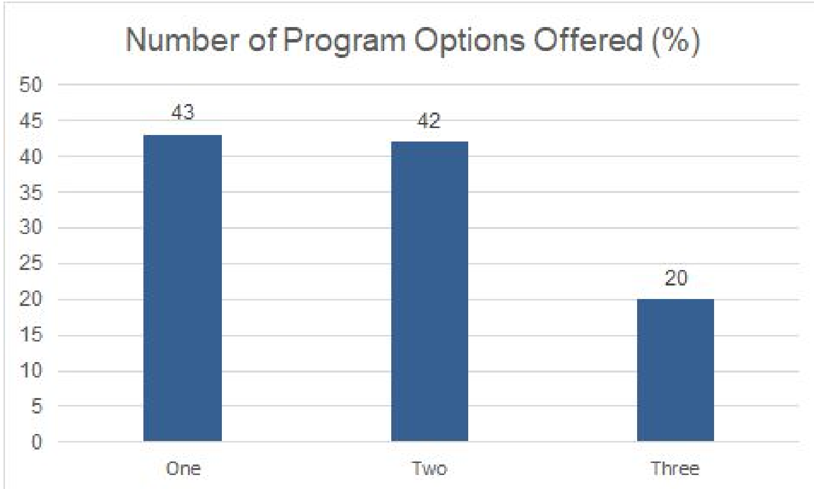
Available response categories included summer, semester, and academic year long programs as well as an "other" option with an open-ended comment box. Providers were able to and often did select more than one option.

40 providers responded to this question. 38 of the 40 respondents selected at least one of the three standard program lengths. Two respondents offered only "other"-length programs (see below). Semester-long programs were the most common, with 75% of providers offering this program type. Roughly half of respondents (53%) offer academic-year long programs, while just 40% offer summer gap programs.




Respondents were allowed to select more than one program length option. Of the 38 respondents that offer at least one of the traditional program length options:

- 16 (43%) offer just one program type. Of these, half offer semester-length programs (8) and half offer academic-year long programs (8). No respondents indicated that they offer only summer programs.
- 15 providers (42%) indicated that they offer two different program types. Of these, the majority of providers offered both summer and semester programs (9), while the remainder offered both semester and academic programs (6).
- 7 providers (20%) indicated that they offer programs for all three of the most common program lengths (i.e., summer, semester, and academic year-long programs).

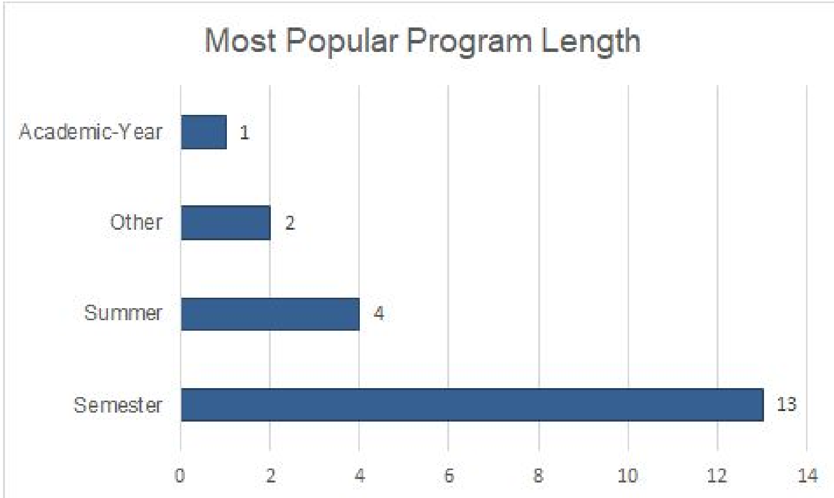



Eight providers indicated that they offered “other” program length options in lieu of or in addition to one or more of the options listed above. The other program types identified here include shorter programs (e.g., two weeks) that do not fit the study’s definition of a gap year program, spring break or winter break programs (of approximately 4-7 weeks duration), and/or the option to combine two semester programs in order to create a full academic year experience. One provider offers experiences that are variable in length -- averaging 9-12 months in length -- with open-enrollment (e.g., more self-designed experiences vs. set program periods).

*Q2: Which program type/length was the most popular (e.g., received the most applicants) in the 2019-2020 program cycle?*

37 providers responded to this question. 17 of these providers offer only one type of program. Those providers were removed from the analysis as the most popular program type is less meaningful in cases where the provider only offers one option.

Of the 20 providers that offer more than one program length option, 13 (65%) indicated that the semester-long programs were the most popular, four indicated that summer-length programs were the most popular, two said “other” program options were most popular, and just one indicated academic year-long programs were the most popular option.




*Program Cost*

We asked all respondents to provide details on the cost of their programs.

> *How much did your gap year programs cost during the most recent program cycle (2019-2020)? For each program type/length, please enter the lowest and highest program cost, separated by a colon.*

Thirty-six providers responded to this question. Within each program type (summer, semester, or academic-year), we calculated the average program cost for each provider by averaging the highest and lowest cost programs. We then averaged across providers to assess average costs by program type.

| Program Type | # of Providers | Average Cost | Price Range |
|---|---|---|---|
| Summer | 12 | $4,680 | $750-$16,925 |
| Semester | 25 | $11,470[1] | $750-$25,000 |
| Academic-year | 14 | $22,786 | $750-$53,000 |

The academic-year average cost is brought down by several providers who offer (1) fully or mostly online programs, (2) support and coaching services for more self-designed gap experiences, and/or (3) more traditional academic programs rooted in

[1] One outlier was removed from this calculation. This provider's semester program cost was more than three times the field-wide average. This cost difference reflects the fact that this provider offers professional, therapeutic programs which significantly raise the cost of running a gap program. It is difficult to compare a program of this nature with a more traditional gap year program that does not offer the same kind of professional therapeutic resources.

formal coursework. Programs of this type cost in the range of $1,000 to $7,600 for an academic year. Alternatively, the average cost is inflated by a therapeutic program that costs nearly twice the average. If we remove these outlier programs from the data set, the average cost of academic-year long programs rises to $27,583. This number represents the average cost of more traditional (non-therapeutic) academic year programs.

It is difficult to compare program costs across providers due to a number of factors. For one, “semester” programs can differ in length from as little as eight weeks to as many as fourteen weeks. Similar discrepancies in length exist within the summer and academic-year program categories. A better way to compare costs could be to look at cost per week within each program type. Even here, however, there are difficulties. Programs are very different. Some programs include room and board, international travel, and formal instruction while others include only online material and/or virtual coaching. The most expensive programs in our data include formal, professional therapy, and/or therapeutic resources. It is difficult to compare across these programmatic differences as the number of resources and level of amenities offered will necessarily impact the program cost. We do hope, however, that this first attempt to gather empirical data on program costs can help inform discussions about accessibility and inclusion in the gap year field.

*Program Location*

We also collected data on the locations or destinations of eligible programs offered by providers. Thirty-nine providers responded to the following question:

> *In the most recent program cycle (2019-2020), in which of the following regions did you offer eligible gap year programs? Check all that apply.*

Among these providers, the most common program destinations were (in rank order):

- Central America (46%)
- USA (41%)
- South America (36%)
- Southeast Asia (36%)
- Western Europe (33%)
- South Asia (31%)
- East Asia (31%)
- South Pacific (23%)
- Caribbean (21%)

Less common were programs in Africa (any region), Eastern Europe, Canada, and the Middle East:

- South Africa (18%)
- West Africa (16%)
- East Africa (16%)
- Canada (16%)
- Eastern Europe (10%)
- Central Africa (5%)
- Middle East (5%)

Nearly half of providers offer at least one program in Central America, while less than 20% offer programs in any given region of Africa and just 12 of the 39 providers (31%) who responded indicate that they offer a program or send students anywhere in Africa.

We also asked providers to report their most popular destinations (the destinations that received the most applications) for the 2019-2020 program cycle.[2] Thirty-five providers responded to this question.

Of these, nine providers, or 26%, listed just one program destination, suggesting that they offer program/s in just one location. Of these single-destination providers, five offer programs in the USA (or its territories) or Canada. The others run programs in Israel, Western Europe, Africa, or Latin America.

Of those providers that list more than one available program destination (26 total), the most popular destinations (based on number of applications) were in:

- Asia (27%)[3]
- Central America (23%)
- South America (12%)
- Africa (12%)
- USA (12%)
- South Pacific (8%)
- Western Europe (8%)

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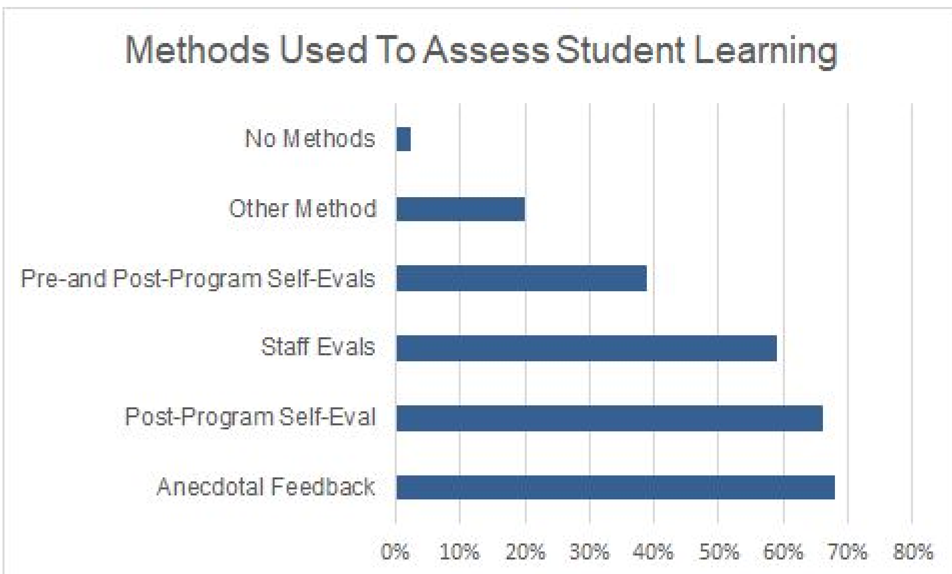
[2] In the most recent program cycle, what were the top three most popular (e.g. received the most applications) gap year programs/destinations you offered? Please list in order of popularity.
[3] All except one of these providers offers programs in other regions (i.e. programs *not* based in Asia). The single exception was a provider that offered three distinct program destinations *within* East Asia.

## Internal Assessment of Student Learning

In the 2020 survey, we introduced new questions to better understand how providers assess or measure student learning as a result of program participation. We asked:

> *What methods do you currently use to assess student learning outcomes or program impact/s? Please check all that apply.*

41 providers answered this question. Of these, the most common forms of evaluation used by providers were: anecdotal feedback (68%), post-program self-evaluations (66%), and staff evaluations of participants (59%). Pre and post-program evaluations were less common (39%). Only one provider indicated that they did not currently assess student learning in any way.




15 of the 16 providers that utilize pre- and post-program self-evaluations report using self-designed surveys.[4] One of these providers also uses the IDI (Intercultural Development Inventory) in addition to a self-designed survey. Another reports using survey questions that are externally validated in addition to self-designed material.

Providers were given the freedom to select more than one method of student assessment. Of the 41 respondents, 32 (78%) indicated that they assess student learning using more than one method. Just 9 providers report using a single method.

[4] The final provider reported being unsure of the evaluation tool currently being used.

| # of Assessment Methods | # of Providers |
|---|---|
| 1 method | 9 |
| 2 methods | 12 |
| 3 methods | 19 |
| No Methods | 1 |

Of those providers that only used one method to assess student learning (9 total), three used pre-post self-evaluation surveys, three used only post-program self-evaluation surveys, one used staff evaluations, one used anecdotal feedback, and one used an alternative method.

The most common combination of methods was: anecdotal feedback, staff evaluations, and post-program self-evaluations. Just over 25% (11) of providers reported using this combination of tools for assessing student learning.

20% of respondents (8 total) reported using “other” evaluation methods, either alone or in combination with one or more of the methods discussed above. Other methods reported for assessing student learning include:

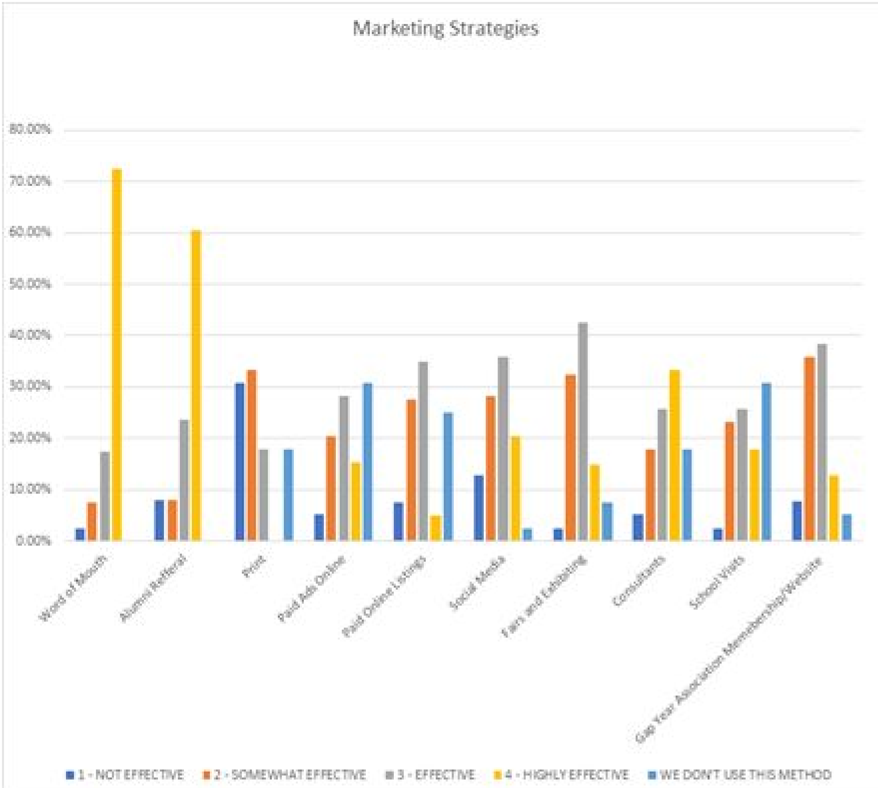
- Goal completion
- Blog posts or other forms of student written reflection
- Academic grades, coursework, and/or evaluation of academic assignments
- Oral Proficiency Interview (OPI) for foreign language fluency
- Results of relevant certification exams
- Mid-program self-evaluations

## Marketing and Recruitment

*Marketing Strategies*

Participants were asked to rate the perceived effectiveness of the following ten marketing strategies: Word of Mouth, Alumni Referral, Print, Paid Ads Online, Paid Online Listings, Social Media, Fairs and Exhibiting, Consultants, School Visits, and Gap Year Association Membership/Website. Scoring ranged from “0- We don’t use this method”, “1- not effective”, “2- somewhat effective”, “3-effective”, and “4-highly effective”. 40 participants filled out each column for Word of Mouth, Paid Online

Listing, and Fairs and Exhibiting, while the remaining marketing methods fluctuated with 38-39 answers for each other option.




Word of Mouth was reported to be the most effective method with 72.5%. Alumni Referral were the next highest used method found to be effective at 60.5% followed by Consultants at 33%. Print had the highest total under the “not effective” column (30.7%). Under “we don’t use this method” both Paid Ads Online and School Visits came in as the highest (30.7%) while Paid Online Listings came in closely at second (25%). The trend certainly supports providers moving away and finding paid ad spots to be less enticing.

All programs use word of mouth and alumni referral as marketing techniques, and nearly all the organizations find both to be either highly effective or effective. A little over 2% of the providers do not use Social Media as a method. The effectiveness for Social Media ranges from 20-35%.

*Current Investments in Marketing Strategies*

Participants were asked to list, in order, the top three marketing strategies in which they are currently investing. The question was: “From most to least, what are the TOP

THREE marketing strategies you are currently prioritizing." "Prioritizing" refers to institutional resources. 40 organizations completed all three columns for each marketing strategy. The most used marketing strategy currently prioritized is word of mouth, followed by social media and fairs and exhibiting.

## Additional Concerns

*Gap Year Association Activities and Trainings*

When asked to list the top three Gap Year Association activities that matter the most to their organization, the top choice was new student recruitment at 59%, followed by the annual conference (best practices, networking) at 51%, and rounding out the top three with public advocacy for the gap year movement at 39%.

In regard to training, when asked what leadership development opportunities would be of interest to them, 73% found assessment training to evaluate student, staff and program outcomes was checked off by 22 out of the 30 organizations that responded to this question, followed by GYA accreditation and standard training at 53%, while 40% felt the need for program director training.

*Broader Industry Concerns*

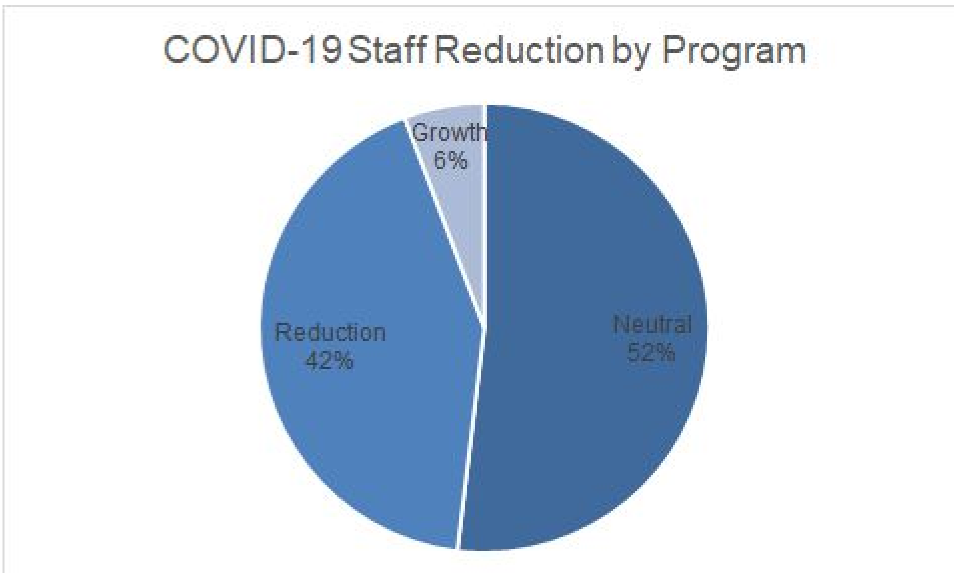
When asked about industry concerns at present, the top three responses were (1) ensuring accessibility and inclusivity through more financial aid (65%), (2) low enrollment trends (50%), and (3) lack of support from schools due to insufficient knowledge and understanding of gap year programs (48%).

*Environmental Sustainability*

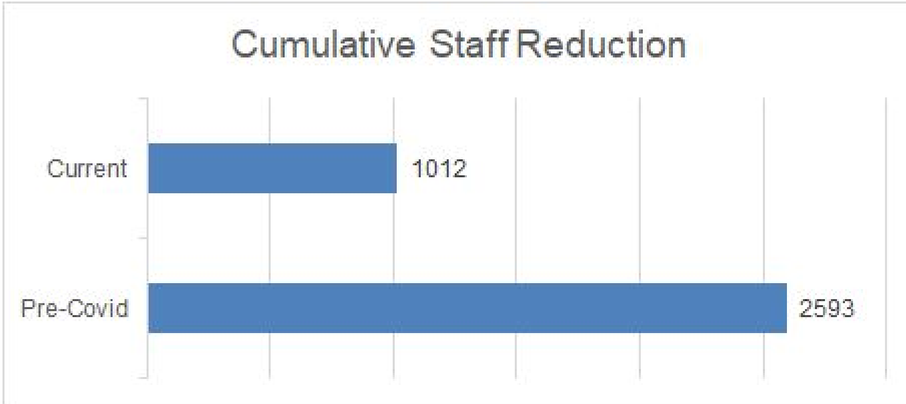
Organizations were asked if they are tracking and/or offsetting any carbon emissions associated with program travel or program impacts and 26% stated they do, while 62% stated they do not and 12% were not sure. When asked if their organization currently has an environmental sustainability statement, policy or specific guidelines in place, 40% of organizations stated they do, while 50% listed they do not and 10% stated they were not sure.

*COVID-19 Impact on Staff*

This year, respondents were asked for their full time staff size pre-COVID-19 versus the present. 52 organizations responded. 27 (52%) reported no changes, 22 (42%) reported a reduction in staff, and 3 (6%) reported a growth in staff.

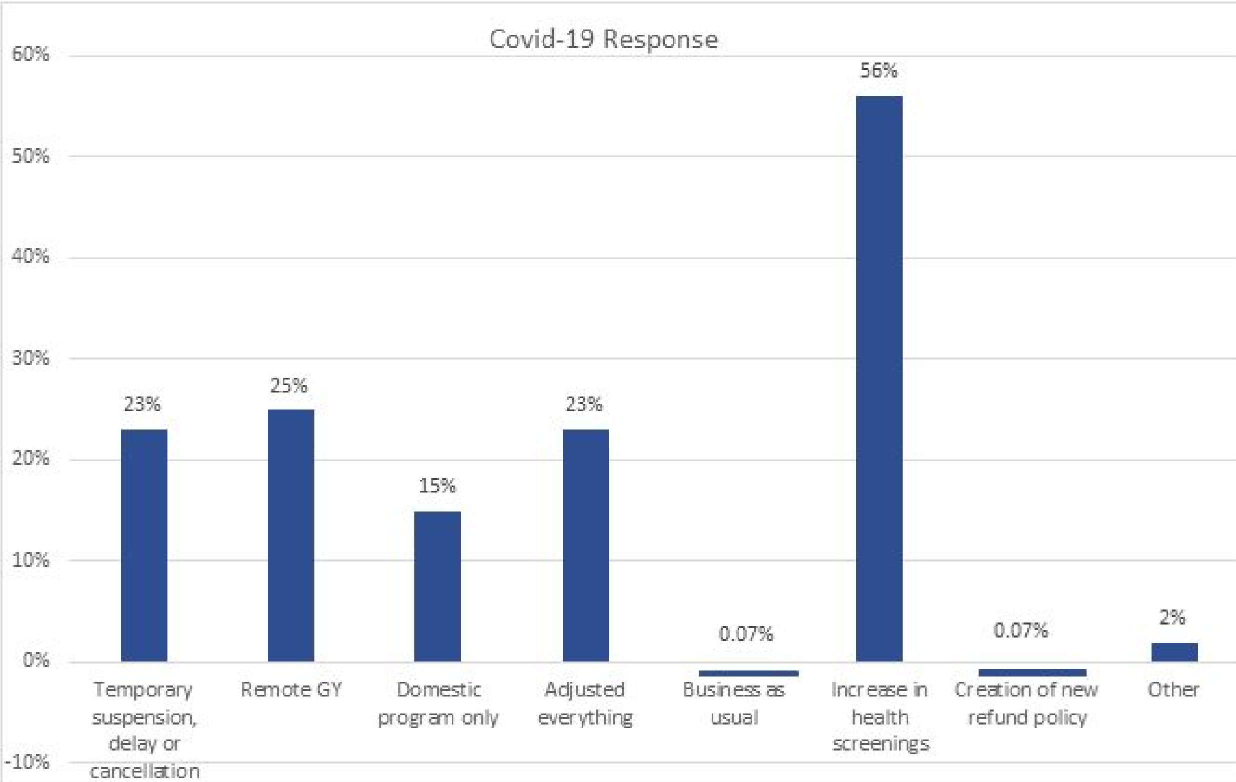



For some organizations staff reductions were deep (as much as 86%). Thus, it is important to highlight the cumulative number of staff reported pre-COVID-19 (2593) as opposed to current (1012) across all respondents. **From this, it can be observed that the cumulative effect was a 61% staff reduction across the gap year industry of professionals.** Thus, while more than half of the programs were able to maintain their staffing from pre-COVID-19 to present, there has still been a significant reduction in staffing across the industry up to when the survey was administered in the summer of 2020. Future research will need to explore if those reductions have continued as the pandemic persists, as well as if and when staffing is able to build back to their original numbers pre-COVID-19. The survey did not ask the nature of those staff reductions as to whether anyone was furloughed or on voluntary leave.




*COVID-19 Impact on Programs*

The last question on the survey was open-ended and related to COVID-19: *What changes have you made to your programs for the coming year in light of the COVID-19 crisis*? 39 organizations answered this question and common themes were noted. Almost all of the answers included some form of adjustment made to their program. Most listed some type of health screening and contingency plans for the upcoming semesters of fall 2020 and spring 2021. The majority reported going to a remote gap year model, while a small number reported a temporary suspension, cancellation, or delay of their program(s). Reportedly due to COVID-19, a few organizations created a more flexible refund policy. Three organizations reported experiencing no difference and it was "business as usual." Other adjustments listed included: increasing program insurance, adjusting scholarship commitments, and utilizing this crisis to create change. Below is a visual representation of the buckets of themes expressed in this open-ended question:


Covid-19 Response
60%
50%
40%
30%
20%
10%
0%
-10%
23%
25%
15%
23%
0.07%
56%
0.07%
2%
Temporary suspension, delay or cancellation
Remote GY
Domestic program only
Adjusted everything
Business as usual
Increase in health screenings
Creation of new refund policy
Other