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EAB

Royall & Company

# Effect of the Current Political Environment on International Student Enrollment

Insights for U.S. Colleges and Universities

# Royall & Company Research

## **Pamela Kiecker Royall, Ph.D.**

*Head of Research*

804.741.8965

pkiecker@royall.com

## **Anne Dodson**

*Senior Research Analyst and Program Manager*

804.741.8965

adodson@royall.com

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# Executive Summary

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Royall & Company surveyed 2,104 international students regarding their plans to enroll at a college or university in the United States. The survey was deployed on February 17, 2017, and data collection continued through February 28, 2017.

Student respondents were drawn from a pool of approximately 30,000 high school students who had inquired at one or more of a diverse set of colleges and universities in the United States. Survey participants currently reside in 150 different countries, with the largest number of students living in India (12.0%), China (6.9%), Nigeria (3.0%), Pakistan (2.9%), Mexico (2.5%), and Canada (2.4%). The full sample includes students from each of the countries that constitute the current population of international students enrolled at U.S. institutions.

Results show that, for one in three prospective international students, interest in studying in the United States has decreased due to the current political climate. This report reveals key influences on students' current interest in studying at U.S. colleges and universities, including factors that have produced a decline in their interest, and identifies the sources international students are using to gather information about higher education institutions in the United States.

## Survey Participant Profile

- International students responding to this survey live in 150 different countries.
- Forty-five percent reside in the Asia and Oceania region<sup>1</sup>, 18.9% in Europe and Canada, 15.9% in the Latin American region, 14.1% in Sub-Saharan Africa, and 6.2% in the Middle East and North Africa region.
- Almost 17% (16.5%) are residents of Muslim-majority countries<sup>2</sup>.
- Sixteen students are from six of the seven countries included in the original travel ban (Iran, Iraq, Somalia, Sudan, Syria, Yemen).
- Eighty-six percent (86.4%) are prospects for the 2017 entering class, and 13.6% are prospects for the 2018 entering class.
- Fifty-four percent (54.4%) are female, 45.1% are male, and 0.6% identify as "other" gender.
- Thirty-nine percent (38.7%) are attending a private high school, 36.3% an international school, and 24.6% a public high school.

## Key Findings

- One-third of the international students surveyed (32.7%) indicated their interest in attending a college or university in the United States has decreased due to the current political climate in the United States.
- Students whose interest has decreased are more likely to be from outside the Sub-Saharan Africa region, and students from the Middle East make up the highest percentage of students whose interest has decreased; students whose interest has decreased are also more likely to be juniors (2018 entering class prospects) and attending international schools.

<sup>1</sup> Regions are based on the Institute of International Education classification; countries are listed by region on page 18.

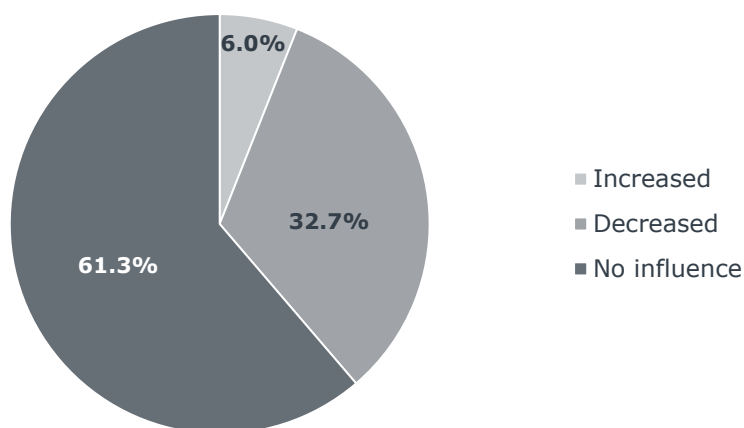
<sup>2</sup> Muslim-majority countries are identified in the Pew Research Center report: "The Future of the Global Muslim Population"; countries are listed on page 18.

- When asked why their interest in studying in the United States has decreased, the most common responses were concerns about (1) the U.S. presidential administration (68.9%), (2) travel restrictions (54.6%), (3) personal safety (52.4%), and (4) the cost of studying in the United States (50.2%).
- For students whose interest in studying in the United States has increased or has not been influenced by the current political environment, factors that could lessen their interest in studying in the United States include reduced financial support for international students (55.7%), visa restrictions for international students (55.3%), and tuition increases (50.2%).
- While most international students believe the United States welcomes global diversity at its colleges and universities (72.5%), almost one-quarter (22.7%) indicated they were unsure; 4.8% indicated they don't think U.S. colleges and universities welcome global diversity.
- When asked what types of institutions they are considering in the United States, the majority of students indicated schools in an urban location (64.5%), top-tier schools (61.1%), and medium-sized schools (51.5%).
- When identifying specific U.S. schools where they applied or plan to apply, students most frequently named New York University (237), Harvard University (200), Stanford University (171), Massachusetts Institute of Technology (146), University of Pennsylvania (130), Boston University (129), and University of California Berkeley (128).
- Most international students are gathering information about colleges and universities through specific college websites (82.6%) and emails from colleges (62.3%).

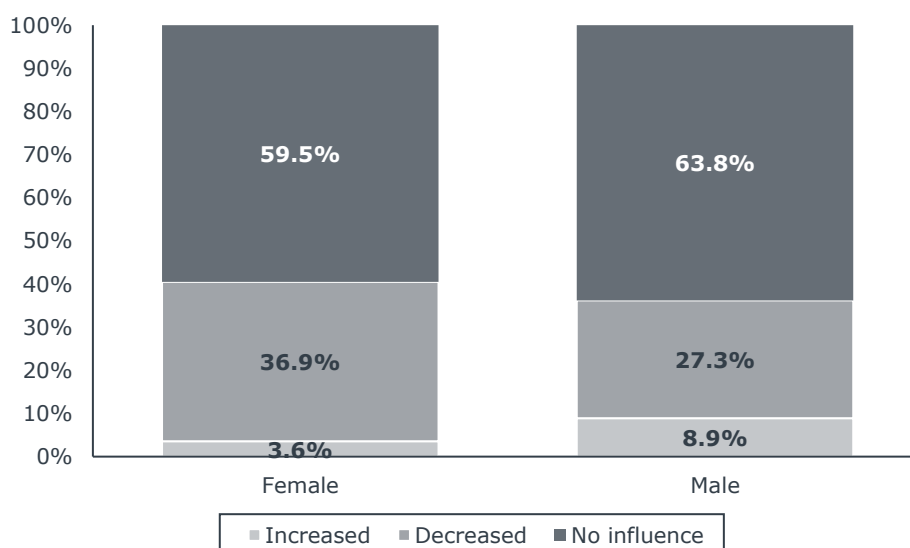
# Overview of Findings

This report provides a summary of findings from a recent survey of international student prospects for 2017 and 2018 entering classes at colleges and universities in the United States. Findings presented in the report include responses from 2,104 high school students living/studying outside the United States. The full sample of students responding to the survey included an additional 192 students who identified themselves as U.S. citizens studying abroad and 39 students for whom citizenship is unknown. These students are not included in the full analysis that follows; however, some results are provided for the 192 students who are U.S. citizens.

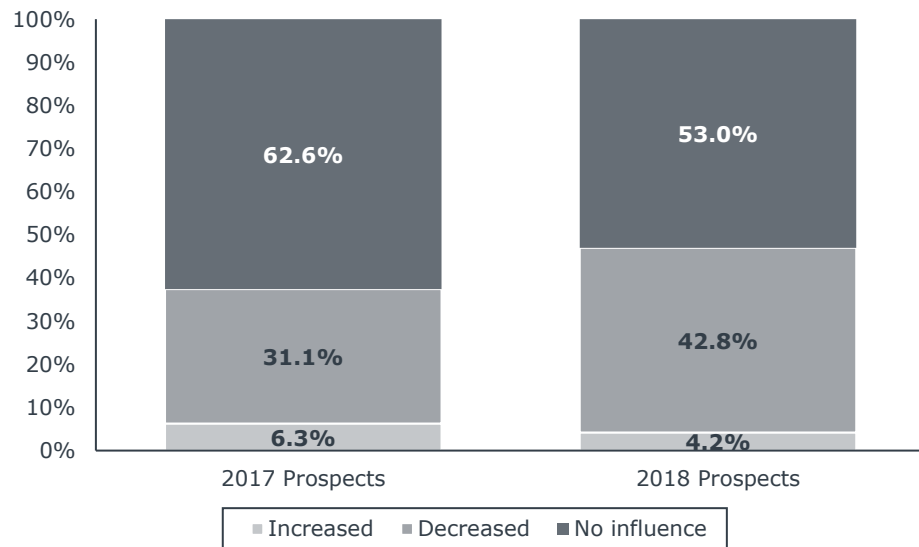
## Has your interest in studying in the United States changed in light of the current political climate in the United States?



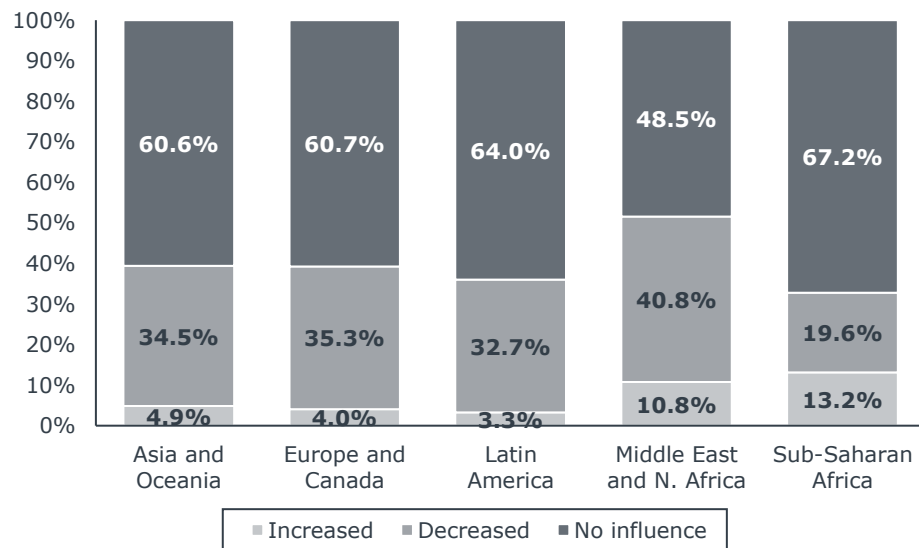
Females were more likely than males to indicate their interest in studying in the United States has decreased in light of the current political climate; males were more likely to indicate their interest has increased.



Prospects for entering class 2017 were more likely than 2018 prospects to indicate their interest in studying in the United States has not been influenced by the current political climate; 2018 prospects were more likely to indicate their interest in studying in the United States has decreased.



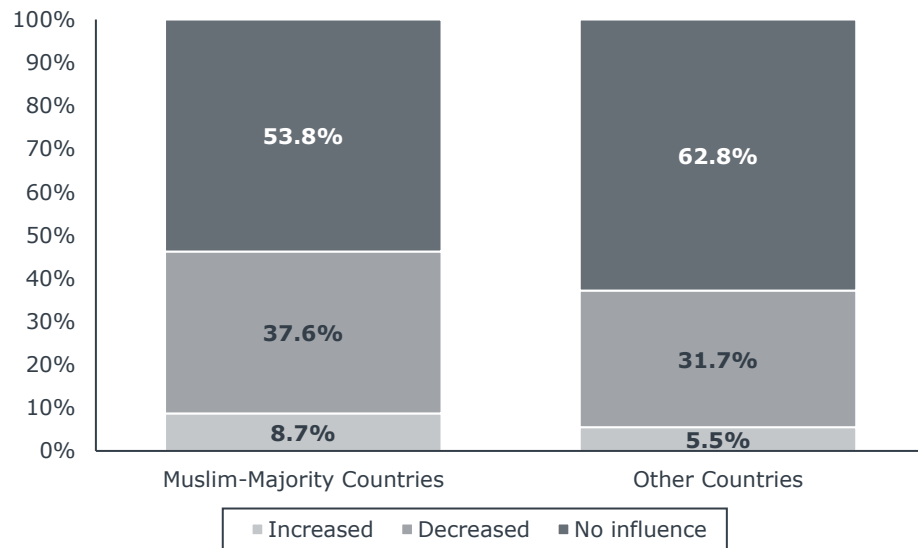
Students residing in countries outside sub-Saharan Africa were more likely to indicate their interest in studying in the United States has decreased, and students from the Middle East and North Africa region made up the highest percentage of students whose interest has declined.



The following table displays the effect of the current political climate in the United States on students' interest in studying in the United States by country of citizenship. It includes countries with 50 or more students responding and shows a significant percentage of students from Canada, India, Mexico, Pakistan, South Korea, and Brazil indicating their interest has declined.

	Increased Percent	Decreased Percent	No Influence Percent
India (n=273)	2.9	43.2	53.8
United States (n=192)	3.1	19.8	77.1
China (n=158)	5.7	24.7	69.6
Nigeria (n=68)	13.2	16.2	70.6
Pakistan (n=66)	4.5	39.4	56.1
Mexico (n=58)	5.2	41.4	53.4
Canada (n=55)	1.8	50.9	47.3
South Korea (n=54)	3.7	37.0	59.3
Brazil (n=53)	1.9	34.0	64.2
Vietnam (n=52)	7.7	17.3	75.0

Students from countries with a Muslim-majority population were more likely to report their interest in studying in the United States has decreased than were students from other countries.





Students who indicated their interest had increased or was not influenced by the current political climate were asked what, if anything, would lessen their interest in studying in the United States. While more than half of the students indicated visa restrictions for international students (55.7%) and more than one-third indicated a travel ban (36.1%), two of the three most frequently cited reasons were related to financial considerations.

**At this time, what (if anything) would make you less interested in studying in the United States?**

	Percent
Reduced financial support for international students	55.7
Visa restrictions for international students	55.7
Tuition increases	50.2
A travel ban	36.1
A wall is built to keep out immigrants	22.5
Increased student protests on U.S. campuses	14.0
Increased activism on U.S. campuses	10.8
Other*	3.7
Nothing would make me less interested	11.1

\*Other responses: racism/discrimination/extremism (17), will be hard to get a job (8), Trump (7), hard to become a citizen (2), family (2), cost of living (2), fear of deportation, don't like the culture in the U.S., boycotting the U.S., and family won't be able to visit

Females were more likely than males to indicate tuition increases (54.3% versus 45.6%) or a wall being built (29.1% versus 15.4%) would reduce their interest in studying in the United States.

Students from countries in the Asia and Oceania region were more likely to indicate increased activism on campus would lessen their interest in studying in the United States (14.2%) than were students from countries in sub-Saharan Africa (5.6%).

Students enrolled in public and private high schools were more likely to indicate reduced financial support (61.4% and 58.0%, respectively) would lessen their interest in studying in the United States than were students enrolled at an international school (47.0%).

Students who indicated their interest in studying in the United States has decreased due to the current political climate were asked to indicate the primary reasons for this change. Concerns about the presidential administration was identified by two out of three students. In addition, more than half identified concerns about travel restrictions, concerns about personal safety, and the cost of studying in the United States.

**What would you say are the primary reasons your interest in studying in the United States has decreased?**

	Percent
Concerns about the U.S. presidential administration	68.9
Worried about travel restrictions for international students	54.6
Worried about my personal safety	52.5
It is too expensive to study in the United States	50.2
Prejudice and/or discrimination against people from my country	48.0
The people of the United States seem less welcoming to international students	45.3
Worried that support for U.S. higher education will decline	27.0
More likely to be admitted to schools in countries other than the United States	15.3
The climate within my home country is now better for students	4.8
Other*	5.7

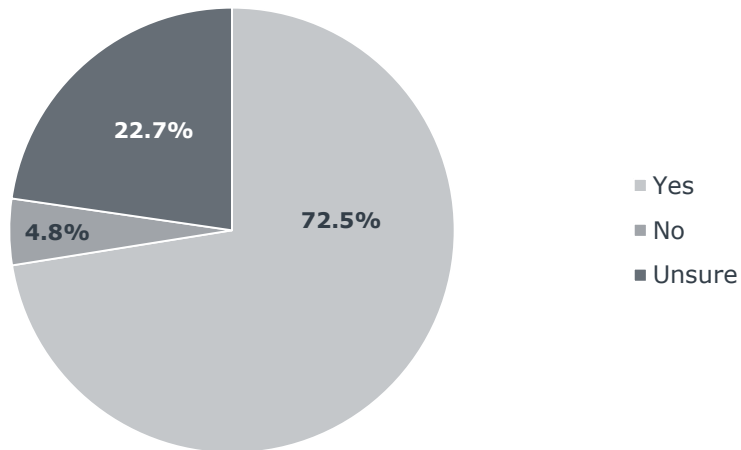
\*Other responses: increased discrimination (21), increased volatility/unsafe conditions/protests (6), financial considerations, job prospects (3), liberal tendencies on campuses (2), censorship, situation in own country, fear of deportation, Trump, moving away from parents, and decline in quality of education in U.S.

A number of students indicated a combination of concerns: students who indicated they were concerned about the U.S. presidential administration were also worried about travel restrictions (58.9%), their personal safety (57.4%), the expense of studying in the United States (53.7%), and prejudice and discrimination (50.6%).

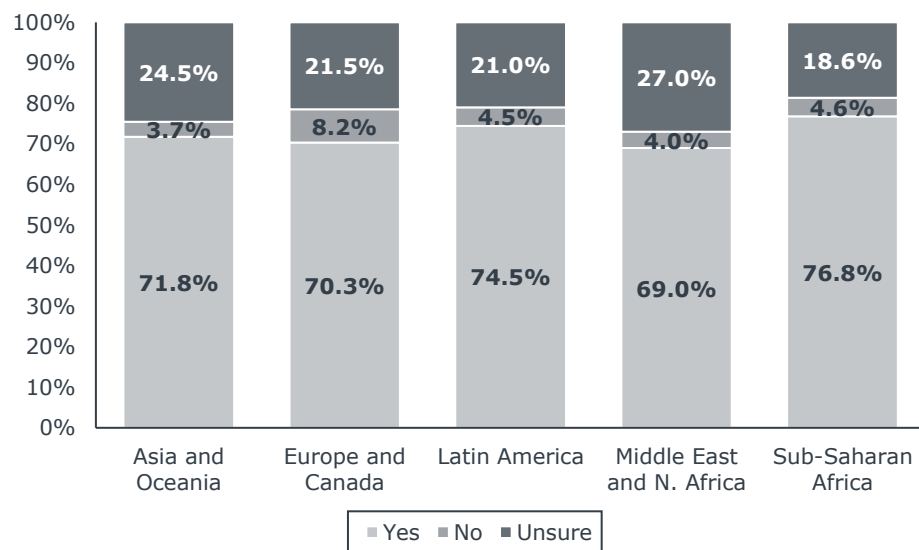
Students from Muslim-majority countries were more likely than students from other countries to indicate they were worried about travel restrictions (67.4% vs. 51.7%) and prejudice or discrimination (58.9% vs. 45.6%).

Next, all students were asked whether they believe the United States welcomes global diversity at its colleges and universities.

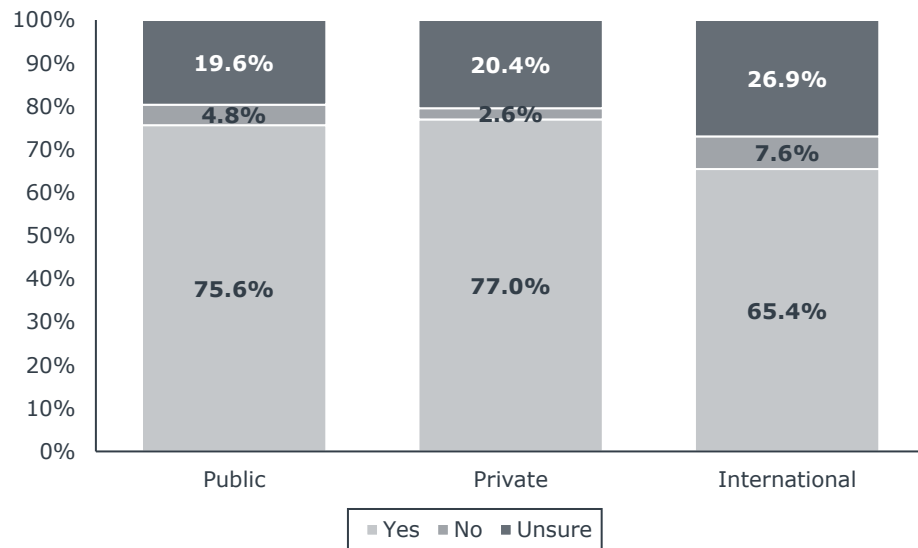
**Thinking beyond your personal situation, do you believe the United States welcomes global diversity at its colleges and universities?**



Students from Europe and Canada were more likely to indicate the United States does *not* welcome global diversity at its colleges and universities than were students from other countries/regions. There were no significant differences between students from Muslim-majority countries and other countries.



Students enrolled at international schools were more likely to indicate they are unsure whether the United States welcomes global diversity at its colleges and universities than were students enrolled at public or private high schools.



Next, students were asked to indicate the types of U.S. institutions (i.e., the characteristics of institutions) that are desirable to them. Most identified an urban location, top-tier school, and medium-sized school (3,000-9,999 students).

**As you think about your college options within the United States, check each school characteristic/type that is desirable/attractive to you.**

	Percent
Urban location	64.5
Top-tier school	61.1
Medium (3,000-9,999 students)	51.5
Private school	49.4
Research university	43.9
Ivy League school	43.4
Suburban location	38.5
Liberal arts college	33.1
Public school	32.4
Large (10,000 or more students)	31.4
Small (1,000-2,999 students)	25.6
Mid-tier school	23.1
Rural location	11.4
Religiously affiliated school	8.3
Very small (< 1,000 students)	8.2

	Percent
Lower-tier school	1.0

All students were asked to list colleges and universities where they applied or planned to apply (identifying their top three schools). The schools they selected most frequently are top-tier schools, in mostly urban locations, and primarily located in the Northeast or California. When asked why a particular college was their first choice, academic programs and faculty (32.0%) and ranking and reputation (20.2%) were cited most frequently, followed by a welcoming environment (9.9%) and location (8.1%).

	Count*
New York University	237
Harvard University	200
Stanford University	171
Massachusetts Institute of Technology	146
University of Pennsylvania	130
Boston University	129
University of California Berkeley	128
Yale University	126
Columbia University in the City of New York	125
University of California Los Angeles	117
Princeton University	111
Cornell University	96
Fordham University	83
Brown University	76
University of Southern California	75

\*Table includes institutions selected by at least 75 students.

Finally, students were asked about the sources of information they used to gather information about studying in the United States. Specific college websites and email from colleges were used by more than half of the students. Personal sources, such as high school counselors, friends already studying in the United States, and parents and family members were used by at least one-third of students responding. Sources used by less than 20% of students (not displayed in the table below) include independent college counselors/agents (17.6%), college guidebooks (17.6%), personal letters from colleges (17.4%), college publications other than the viewbook (15.1%), advertisements (14.8%), EducationUSA office (12.3%), telephone conversations with college reps (5.7%), and CDs/DVDs/Videos from colleges (3.5%).

### **What sources/tools have you used to gather information about studying in the United States?**

	Percent
Specific college websites	82.6
Email from colleges	62.3
High school guidance counselors	48.6
Friends already studying in the United States	46.7
Websites other than those of specific schools	43.4
Social media/networking sites for colleges	40.3
Parents and other family members	39.7
<i>U.S. News &amp; World Report</i>	34.6
High school classmates	33.7
College fairs	33.6
Teachers and coaches	31.5
Videos posted by colleges on YouTube	26.4
Viewbooks	24.9
Events hosted by U.S. colleges in my area	23.2
Campus visits	20.3

Table includes sources selected by at least 20% of students.

Students from the United States studying outside the country were similar to international students in the sources they used with these exceptions: parents and other family members were used by 72.8% of students, and campus visits were used by 42.9% of students.

The tables on the following page show significant differences in the sources students used by their gender, region, class year (2017 vs. 2018 prospects), Muslim-majority countries, and high school type.

	Female	Male
Specific college websites	85.7%	78.6%
Email from colleges	66.1%	57.5%
Social media/networking sites for colleges	43.6%	35.5%
Websites other than those of specific schools	41.2%	46.3%
College fairs	39.2%	26.5%
Viewbooks	26.8%	22.4%
Campus visits	23.9%	15.7%
College guidebooks	19.7%	14.8%
Personal letters from colleges	19.3%	15.0%

	Asia and Oceania	Europe and Canada	Latin America	Middle East and N. Africa	Sub-Saharan Africa
Specific college websites	86.0%	89.2%	81.0%	71.4%	68.8%
Email from colleges	59.6%	66.6%	70.1%	59.2%	57.7%
High school guidance counselors	52.5%	51.3%	54.6%	40.8%	27.8%
<i>U.S. News &amp; World Report</i>	46.0%	30.3%	23.9%	24.5%	18.4%
Websites other than those of specific schools	44.3%	48.7%	36.3%	42.9%	42.3%
Parents and other family members	43.4%	46.5%	34.5%	42.9%	23.1%
High school classmates	40.6%	29.9%	30.6%	26.5%	21.8%
Teachers and coaches	35.3%	29.9%	36.3%	20.4%	19.7%
College fairs	33.6%	31.8%	48.9%	23.5%	21.8%
Events hosted by U.S. colleges in my area	25.5%	22.9%	31.3%	15.3%	9.4%
Videos posted by colleges on YouTube	25.3%	35.0%	24.3%	24.5%	22.2%
Independent college counselors/agents	20.4%	16.6%	16.5%	17.3%	10.7%
Campus visits	18.7%	34.4%	24.6%	10.2%	6.0%
EducationUSA office	11.3%	8.6%	14.4%	9.2%	19.2%
Telephone conversations with college reps	4.2%	6.1%	8.8%	5.1%	7.3%

	2017 Prospect	2018 Prospect
Email from colleges	60.0%	74.3%
High school guidance counselors	44.1%	71.8%
Parents and other family members	38.3%	46.8%
<i>U.S. News &amp; World Report</i>	36.3%	25.4%
High school classmates	32.0%	42.1%
College fairs	30.6%	49.3%
Teachers and coaches	29.3%	43.2%
Viewbooks	23.6%	31.8%
Events hosted by U.S. colleges in my area	21.2%	33.6%
Campus visits	19.1%	26.8%
College guidebooks	16.4%	23.6%
EducationUSA office	13.8%	4.3%

	Muslim-Majority Country	Other Country
College fairs	27.0%	35.0%
College guidebooks	13.1%	18.5%
Campus visits	12.5%	21.9%

	Public High School	Private High School	International School
Parents and other family members	31.1%	41.2%	44.6%
High school classmates	25.1%	31.4%	42.7%
Teachers and coaches	24.9%	30.0%	38.0%
High school guidance counselors	24.6%	49.4%	64.6%
College fairs	23.0%	33.1%	42.0%
EducationUSA office	17.0%	13.6%	7.5%
Campus visits	17.0%	17.1%	26.0%
Events hosted by U.S. colleges in my area	15.3%	23.6%	28.4%
College guidebooks	15.1%	15.5%	21.4%



When students were asked to indicate the one source that was the most helpful to them, “specific college websites” was selected most frequently, followed by other websites, high school counselors, and email from colleges.

**Among the sources you used to gather information about studying in the United States, which source was most helpful to you?**

	Percent
Specific college websites	25.6%
Websites other than those of specific schools	9.4%
High school guidance counselors	9.0%
Email from colleges	7.5%
Friends already studying in the United States	6.4%
Campus visits	5.9%
<i>U.S. News &amp; World Report</i>	5.5%
College fairs	5.1%
Independent college counselors/agents	4.3%
Parents and other family members	4.1%
EducationUSA office	2.9%
Social media/networking sites for colleges	2.5%
Teachers and coaches	2.0%

Table includes sources selected by at least 2% of students.

# Participant Profile

The following charts display characteristics of the 2,104 international participants.

<b>Gender</b>	<b>Count</b>	<b>Percent</b>
Female	1,144	54.4
Male	948	45.1
Other	12	0.6
<b>High School Class</b>	<b>Count</b>	<b>Percent</b>
2017 entering class prospects	1,817	86.4
2018 entering class prospects	287	13.6
<b>Region<sup>3</sup></b>	<b>Count</b>	<b>Percent</b>
Asia and Oceania	946	45.0
Europe and Canada	397	18.9
Latin America	334	15.9
Middle East and North Africa	130	6.2
Sub-Saharan Africa	297	14.1
<b>From a Country Included in the Travel Ban</b>	<b>Count</b>	<b>Percent</b>
Yes	16	0.8
No	2,088	99.2
<b>From a Muslim-Majority Country<sup>4</sup></b>	<b>Count</b>	<b>Percent</b>
Yes	346	16.5
No	1,755	83.5
<b>High School Type</b>	<b>Count</b>	<b>Percent</b>
Public	418	24.6
Private	656	38.7
International	616	36.3
Other*	7	0.4

\*Other responses: homeschooled (5) and online program (2)

<sup>3</sup> Regional classifications: **Asia and Oceania:** Afghanistan, Australia, Bangladesh, Burma, Cambodia, China, Hong Kong, India, Indonesia, Japan, Kazakhstan, Kyrgyzstan, Laos, Macau, Malaysia, Maldives, Marshall Islands, Micronesia, Mongolia, Nepal, New Zealand, Pakistan, Philippines, Singapore, South Korea, Sri Lanka, Taiwan, Thailand, Turkmenistan, Uzbekistan, and Vietnam **Europe and Canada:** Albania, Austria, Azerbaijan, Belarus, Belgium, Bosnia and Herzegovina, Bulgaria, Canada, Cyprus, Czechia, Denmark, Djibouti, Finland, France, Georgia, Germany, Greece, Hungary, Iceland, Ireland, Italy, Kosovo, Macedonia, Moldova, Monaco, Montenegro, Netherlands, Norway, Poland, Portugal, Romania, Russia, Saint Lucia, Saint Vincent and the Grenadines, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, and United Kingdom **Latin America:** Antigua and Barbuda, Argentina, Bahamas, Barbados, Belize, Bolivia, Brazil, Chile, Colombia, Costa Rica, Curacao, Dominican Republic, Ecuador, El Salvador, Grenada, Guatemala, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Trinidad and Tobago, Uruguay, and Venezuela **Middle East and North Africa:** Algeria, Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Morocco, Palestinian Territories, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates, and Yemen **Sub-Saharan Africa:** Angola, Benin, Botswana, Cameroon, Cote d'Ivoire, Democratic Republic of the Congo, Eritrea, Ethiopia, The Gambia, Ghana, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mauritius, Namibia, Nigeria, Rwanda, Senegal, Sierra Leone, Somalia, South Africa, Sudan, Swaziland, Tanzania, Togo, Uganda, Zambia, and Zimbabwe.

<sup>4</sup> Muslim-Majority countries: Albania, Algeria, Azerbaijan, Bahrain, Bangladesh, Bosnia and Herzegovina, Djibouti, Egypt, Gambia, Indonesia, Iran, Iraq, Jordan, Kazakhstan, Kosovo, Kuwait, Kyrgyzstan, Lebanon, Malaysia, Maldives, Morocco, Pakistan, Palestinian Territories, Qatar, Saudi Arabia, Senegal, Sierra Leone, Somalia, Sudan, Syria, Tunisia, Turkey, Turkmenistan, United Arab Emirates, Uzbekistan, and Yemen.



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College and university members

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475M<sup>+</sup>

Course records in our student success analytic platform

1.2B<sup>+</sup>

Student interactions annually