Higher Education Branding

Attracting Brazilian Talent
to Danish Higher Education

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Abstract

Purpose: The purpose of this thesis is to develop an understanding of how Innovation Centre Denmark can succeed in branding Danish higher education in order to attract Brazilian talent. The competition for the best international talent has intensified as a result of the rapid globalization that the world has witnessed over the past few decades. Danish higher education in particular has struggled to attract talent outside EU/EEA since 2006, when it required students from these countries to pay full tuition fees at Danish universities.

Approach: The study is guided by a pragmatic research philosophy, where primary data are collected in the format of qualitative in-depth interviews with Brazilian students and Danish representatives for the education sector. An interpretive stance is applied considering the core topic – students' choice of higher education – being a social construction. The study, however, suggests a continuation of the research in a quantitative format to broaden the applicability of the findings. Both theories from nation branding and higher education branding are analyzed in the research, as are also general brand management theories, which are used also in the generation of practical recommendations for Innovation Centre Denmark.

Findings: The analysis of the primary data challenges a range of sub-theories within the fields of nation branding and branding of higher education, and concludes with ten practical recommendations on how to improve the attraction of Brazilian talent. The most prominent findings from the research include the need for increased integration between nation branding and branding of the Danish educational sector, as well as a need to identify Danish fields of excellence in order to establish a perceived balance between value and price by the Brazilian students. Also, the analysis suggests a new view on identity-image gaps in higher education, and casts light on the Brazilians' fundamental motivations for higher education as well as studies abroad, providing the foundation to better target Danish higher education towards this target group.

Research limitations: The very nature of case studies does not allow for the generalization of findings. This study does expose, however, some interesting inconsistencies in existing theory on nation branding and higher education branding, suggesting the potential for further research.

Practical implications: Innovation Centre Denmark's brand for Brazilian students, Top Talent Denmark, can be improved upon by listening to and implementing the final recommendations outlined in this research to the greatest extent possible.

Perspective: The findings for attracting Brazilian talent to Danish higher education may be applied also to attracting talented Brazilians to Danish companies with an interest in Brazil.

Key words: Higher education branding | Nation branding | Talent attraction | Brazil | Denmark

Acknowledgement

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Abbreviations and Definitions

Appx.	Appendix
BRIC	Acronym for Brazil, Russia, India and China
CBBE	Customer Based Brand Equity
Ed.	Editor
EEA	European Economic Area
EU	European Union
ICDK	Innovation Centre Denmark
IELTS	International English Language Testing System
MNC	Multinational Corporation
TOEFL	Test of English as a Foreign Language
TTDK	Top Talent Denmark

Abbreviations for student level

B	Bachelor
M	Master
MBA	Master of Business Administration
PhD	Doctor of Philosophy

Abbreviations for Danish universities

AU	Aarhus University
CBS	Copenhagen Business School
DTU	Technical University of Denmark
KU	Copenhagen University

Definition

Nation Brand	This term is being used interchangeably with *place brand* and also *destination brand*

Attracting Brazilian Talent to Danish Higher Education

1. Introduction

The War for Global Talent

Over the past few decades, the ongoing and increasing globalization of the world has resulted in an ever-intensifying competition for young talent with an international mind-set. Both institutions for higher education, as well as companies are tapping into this pool of international talent, and while their specific motivations may differ, the aim is the same: to beat competition in attracting a particularly resourceful part of the young generation.

There are several reasons as to why universities are competing for international students, and according to Gray, Fam and Llanes (2003) these include, first of all, revenue generation, as international students serve as a source of additional revenues, in a time where many universities are experiencing diminishing funding (Hemsley-Brown and Goonawardana, 2007). Many other benefits, however, also arise from the attraction of international students to a country's educational institutions, hereunder cultural and social benefits as well as the resulting trade and political links that can emerge between countries (Sison and Brennan, 2012). Townsend and Poh (2008) elaborate on this list of benefits by pointing out the further economic benefits for the host country ranging from the tourist activities that international students often engage in to the workforce related benefits, when a proportion of the international students decide to apply for jobs within companies located in a host country. Considering the many benefits, it is hardly surprising that the competition is fierce and continues to intensify. According to Ivy (2008), an increasing number of degrees for international students provided by a wider variety of universities results in an increased need for universities to differentiate themselves from their competition, subsequently, the role of marketing in student recruitment is as important as ever.

Similarly, a range of reasons can be listed to explain why also companies fight to attract international talent. The main one being that "international multifunctional competencies" need be omnipresent in today's organization in order for it to compete successfully in an increasingly global and fast-paced environment, where companies are not only competing against companies from other countries, but also working with suppliers and serving customers in the global market place (Hiltrop, 1999; Botha, Bussin and Swardt, 2011) – *not least* in an age fraught with economic downturn (Beechler and Woodward, 2009).

A Danish Perspective on Attraction of International Talent

The aforementioned reasons hold for Danish companies and universities too, and one of the main benefits from attracting international talent to Danish institutions and companies is that of bridging Denmark with important international markets to secure future growth. Hence, as the benefits from talent attraction are not restricted to individual companies and universities, but also have significant impact on national competitiveness and welfare, *governmental* organizations and authorities are increasingly seeking to brand the *nation* and national produce (Fetscherin and Marmier, 2010).

Innovation Centre Denmark and Top Talent Denmark in Brief

One of the important markets for Denmark to establish relations with is Brazil, not least due to its market size and growth potential, which was highlighted by Goldman Sachs back in 2001 and further in 2003 when they coined the BRIC acronym that later became synonymous with the rapid emergence of new players in the international economy. Consequently, as of 2013, Innovation Centre Denmark (ICDK) – a collaboration between the Danish Ministry of Foreign Affairs and the Danish Ministry of Higher Education and Science – had set up an office in Brazil's largest city, São Paulo.

In accordance with the paragraph above, one of ICDK's two main projects, *Top Talent Denmark,* is to attract Brazilian talent to (1) Danish higher education and to (2) Danish companies (multinational corporations, MNCs). However, while Danish universities and Danish MNCs to varying degrees are already marketing themselves *individually* towards various stakeholders (e.g. their future consumers and employees), the task of ICDK is to establish a *comprehensive* brand with the ability to *encompass* the variety of Danish institutions and at the same time *distinguish* them on the international scene. The case study of Top Talent Denmark is thoroughly laid out in section 6.

As will be explained in more detail in section 5, the primary aim of the thesis is delimited to examine ICDK's strategy for branding *Danish higher education*.

As a result of the situation described in the paragraph above, the problem definition sounds:

2. Problem Definition

How can ICDK develop a comprehensive brand for Danish higher education, resulting in the successful attraction of Brazilian talent to the seven Danish universities currently participating in the Top Talent Denmark project, and *what* factors are important?

2.1 Research Questions and Research Objectives

Research Questions	Research Objectives
(1) What characterizes Danish higher education, and how is Denmark and Danish higher education currently perceived by Brazilian students?	To identify the inherent characteristics of Danish higher education (Danish perspective) and the common associations attached to Denmark and Danish higher education (Brazilian perspective).
(2) What are the main motivations for Brazilian students when choosing a bachelor/master/PhD?	To identify underlying motivations for Brazilian students' decision-making for higher education.
(3) How do the inherent characteristics of Danish higher education fit the aspirations of Brazilian students?	To analyze the extent to which Danish higher education can match the wants and needs of Brazilian students and subsequently, how this match can be improved.
(4) Based on the knowledge from the research, how can Denmark best position its brand of higher education to attract Brazilian students?	To establish what parameters Innovation Centre Denmark should use to better target Danish higher education towards Brazilian students.

(5) How can Denmark best reach the Brazilian students?
  a. Decision-making process (timing)
  b. Touch-points
	To understand the decision-making process that Brazilian students go through when choosing higher education, hereunder what touch points are important.

3. Thesis Outline

Figure 3.1 Thesis Outline: Attracting Brazilian Talent to Danish Higher Education
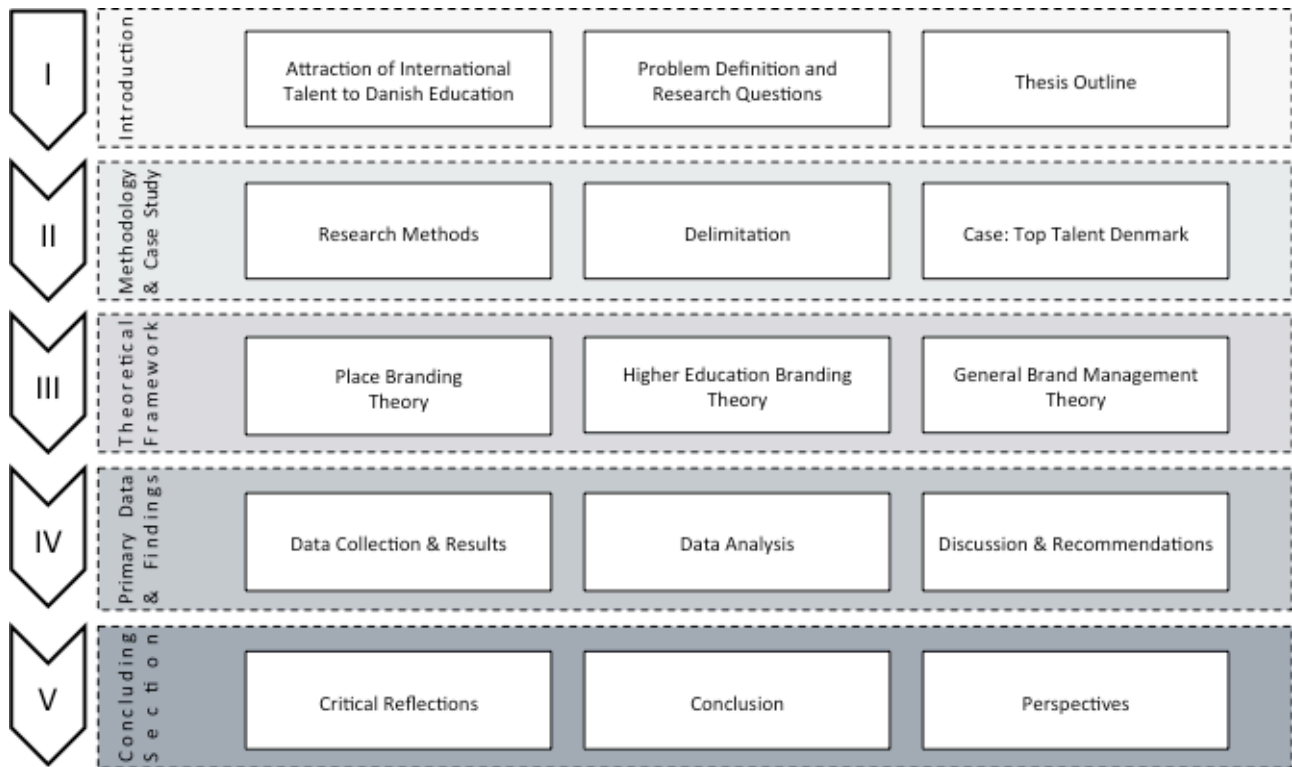
Source: Author's own illustration

As illustrated in figure 3.1 above, the thesis is divided into five main parts. Part I serves as an introduction to the study, and includes a justification of the topic's relevance, which finally leads to the problem definition and five underlying research questions.

Part II comprises of a research methodological review, hereunder a clarification of the overall research philosophy and research approach of the thesis as well as the concrete data collection methods chosen and a section on the study's delimitations.

The theoretical framework of the thesis is found in Part III, which includes 3 main pillars upon which the brand development is founded and with which the data is analyzed.

Part IV involves the data processing, from the initial presentation of raw data to the main data analysis with theory revision, discussion of the findings, and a set of practical recommendations.

Part V closes the thesis by first critically reviewing the study as a whole by outlining main limitations. Finally, the thesis is concluded with reference to the problem statement and ends with a reflection on how the findings may spur further research with both theoretical and practical implications.

4. Research Methods

This section will define the overall research philosophy and underlying methodological choices guiding the thesis. With outset in the so-called *research onion* (Saunders, Lewis and Thornhill, 2008), I have divided my methodological choices into five main parts as illustrated and further explained below:

Figure 4.1 Philosophical View Guiding Thesis
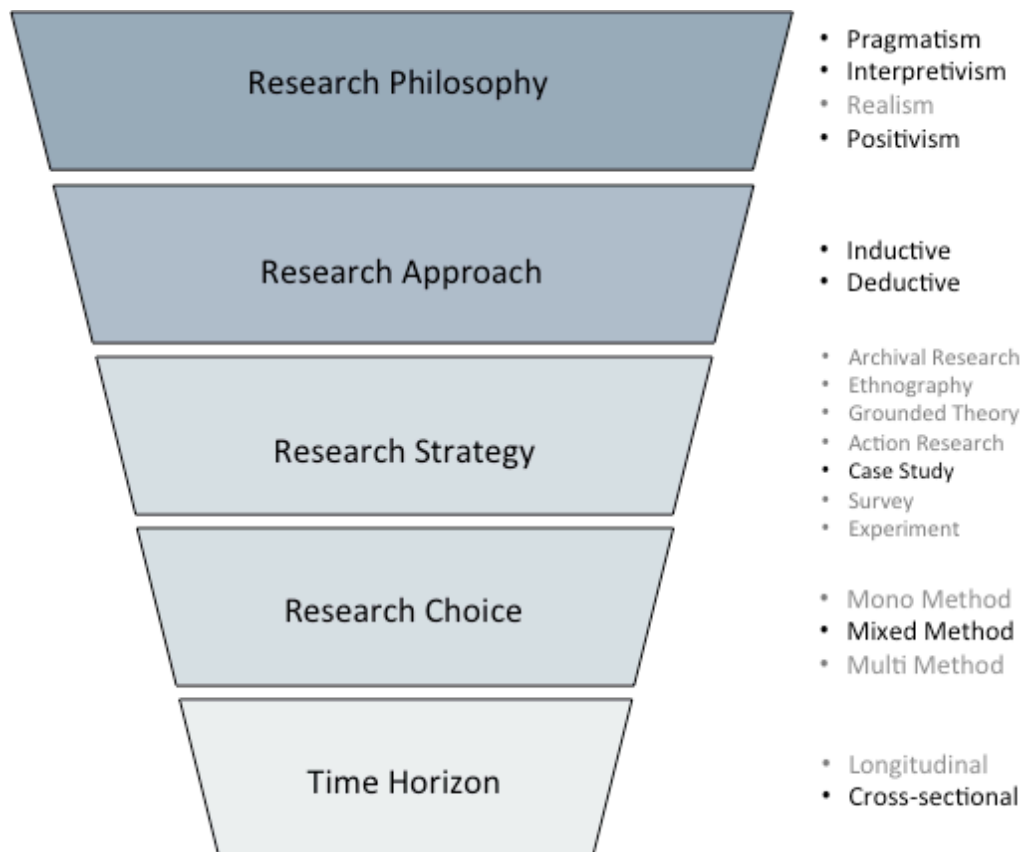
Source: Author's own illustration

Research Philosophy

The problem statement and research questions outlined in the first section are fueled by the practical challenge that ICDK is faced with in terms of establishing a *comprehensive* brand for Danish higher education, capable of attracting talented Brazilians.

The *end goal* is the brand development, whilst the *means* to this goal is to develop an understanding of Brazilian students' motivations for educational choice and their current perception of Danish higher education. Tapping into the minds of the Brazilians gets a central role in the research methodological stance of the study, as this phenomenon needs to be researched to get at the goal.

In order to explore the subject matter in a way that leads to tangible managerial recommendations, the problem statement and research questions are seen as the core elements dictating which methodological choices are most suitable. In other words, the fundamental view that permeates this thesis is *pragmatism*, highlighting the research question as the most important determinant of the epistemological and ontological stance (Saunders, Lewis and Thornhill, 2009). However, whereas pragmatism argues that the research methodological decisions should be determined by the research question, pragmatism in itself is not a research philosophical position like positivism, realism and interpretivism. With the pragmatic view in mind, both interpretivist and positivist stances are adopted for different elements in the thesis.

The *interpretivist* stance applies, as it is a socially constructed phenomenon, which is at heart of the study. Students' choice of higher education is inherently a choice found in the socially constructed world. Without the existence of humans, it would be hard to believe that the choice of higher education would exist (Klausen, 2005). Hence from an ontological consideration, when examining how organizations like ICDK can best influence Brazilian students' choice of higher education, a social constructivist or *subjectivist* stance is appropriate. This view implies that – in order to understand the choices of Brazilian students – it is necessary to explore the subjective meanings motivating those choices (Saunders, Lewis and Thornhill, 2009). The social phenomenon of choosing higher education is created from the *perceptions* of the social actors (Saunders, Lewis and Thornhill, 2009), in this study the Brazilian students. Subsequently, it is those perceptions we must identify to understand the choice and consequently develop the right strategy to attract this talent to Danish higher education.

The research philosophy of interpretivism leads also the epistemological view in this thesis, implying that the *subjective motivations* behind social phenomena such as education choice are regarded acceptable knowledge (Saunders, Lewis and Thornhill, 2009).

On top of looking at educational choice as a socially constructed phenomenon, it is viewed from a *cognitive* consumer perspective, adopting the position that educational choice is largely a cognitively informed decision where the *collection and evaluation of the information on universities is being critically processed and evaluated* (Ivy, 2008, p. 289). In this perspective, the central focus lies on how the human stores knowledge and later retrieves relevant information from the memory (Heding, Knudtzen and Bjerre, 2009). The information stored in a human's memory form small nodes of knowledge, which are linked together with other knowledge nodes in associative networks. Acknowledging this view, brands reside in the mind of the consumer, and the

task for brand managers become to mold the brand associations in the consumer's mind, this way creating brand equity (Heding, Knudtzen and Bjerre, 2009). External stimuli – such as an advert from ICDK – will trigger a node in the memory of the target (e.g. Brazilian student prospect) and through the associative network trigger other nodes of knowledge. Ideally, these associations are strong, favorable and unique (Keller, 2008). A practical challenge is attached to understanding the associations attached to Denmark and Danish higher education as these associations are not necessarily stored in memory as linguistic nodes, whilst language *will* be a main conveyor of the associations in the data collection, forcing informants to translate non-linguistic associations into language (Heding, Knudtzen and Bjerre, 2009).

While the interpretivist research philosophy dominates the approach for *exploring* the motivations of Brazilian students, a positivist stance is applied in the proposal for further research through a quantitative survey. With the analysis of the qualitative data, main themes are established, which in effect are used to develop a questionnaire with the purpose of arriving at a greater degree of representativeness of the results. Due to time and space constraints of the thesis, the questionnaire will be developed only as a proposal for further data collection for ICDK.

Research Approach

In the previous section it was stressed that the problem statement consists of two parts: the end goal and the means to the end goal. In practice, two phenomena need to be explored, and for one there is already a great deal of existing theory, whilst for the other, fewer relevant studies are available. In alignment with my pragmatic view on research methods, both deduction and induction are applied research approaches in the thesis.

A *deductive* research approach is applied to develop the sub-nation-brand, which Top Talent Denmark can be classified as. That is, the widely available and specific theory on nation-branding and general theory on brand management acts as the platform upon which the specific development of Top Talent Denmark will build.

However, to build the brand, a thorough understanding of the specific target group is necessary. To ensure greatest possible diversity in the insights on Brazilians' choice of higher education, an *inductive* and exploratory approach is adopted, as its less rigid structure – in comparison to that of deduction – allows for many different viewpoints (Saunders, Lewis and Thornhill, 2009).

By using an inductive research approach, the study shall conclude from the specific to the general. That is, from the specific study of a relatively small sample of Brazilian students, *general* insights

on their underlying motivations for choice of higher education are derived. Whereas the inductive approach dominates this part of the research, some general studies on motivations for educational choice do exist, and will be used to inform the interview guide, giving it a semi-structured design.

Research Strategies

The project has the format of a case study, the case being ICDK in São Paulo. The case organization is used in order to deepen the understanding of how nation sub-brands such as Top Talent Denmark can successfully come to comprehend the diversity of the seven participating universities in the Top Talent Denmark initiative and at the same time present a uniform and strong brand identity on the international scene. The choice of a case study in this specific project is backed up by the argument of Saunders, Lewis and Thornhill (2009) that the case study is particularly useful in dealing with *how* questions – as with this thesis' problem statement.

Within the case study, both qualitative and quantitative techniques are suggested, although within this thesis the main focus is kept on the qualitative data collection.

Research Choice

Quantitative and qualitative data collection techniques each come with a set of distinct advantages and disadvantages. To arrive at a satisfactory answer to the problem statement, the data collection needs to be able to generate *deep* insights on the underlying motivations for the Brazilian students' choice of higher education, but at the same time be representative to an extent where the findings can serve as a solid foundation for the targeting of Danish higher education to the whole segment of Brazilian students. With this goal in mind, a *mixed-methods research* approach (cf. definition in Saunders, Lewis and Thornhill, 2009, p.152) is used. As illustrated in the figure 4.2 below, a sequential design has been adopted, where first qualitative data collection methods are used to tap into the underlying motivations of Brazilian students. Next, the results of the qualitative analysis will feed into the formation of a questionnaire, allowing for a bigger reach and consequently a stronger foundation, on which to base the branding of Danish higher education. By applying two *complementary* data collection methods, disadvantages of both methods are reduced (Saunders, Lewis and Thornhill, 2009). As mentioned previously, the scope of the thesis does not allow for the actual implementation of the questionnaire.

Figure 4.2 Research Choice
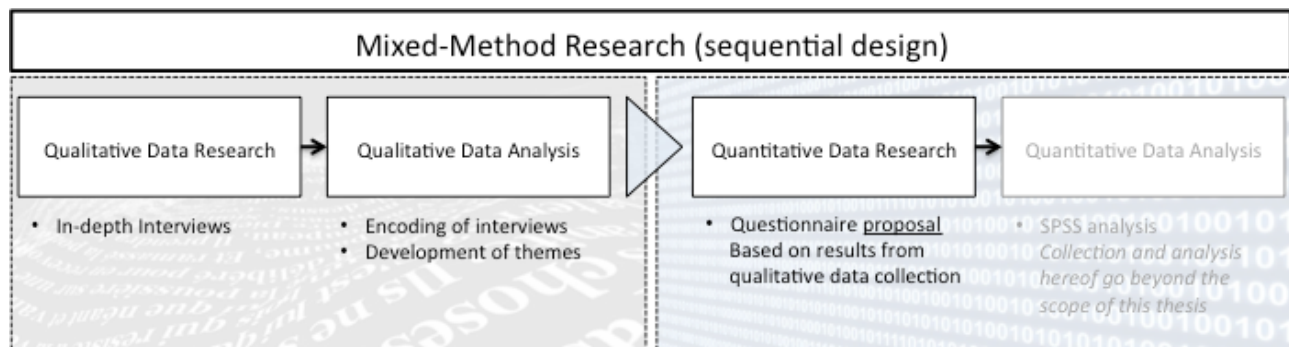
Source: Author's own illustration

Time Horizon

The aim of this study has been to get a *present* understanding of how Denmark can develop and foster a band that inherently encompasses a great deal of variety. In the specific case studied, this includes arriving at a *present* understanding of talented Brazilians' motivations for educational choice. This means that the time horizon has been cross-sectional, providing a snapshot picture. The qualitative dataset has been collected in April and May 2014. The study is thus not capable of tracking change in motivations over time.

Reliability and Validity

As pointed out in the paragraphs above, this stage of the study is mainly qualitative, and in-depth interviews serve as the main method for data collection. This brings some challenges with regards to the credibility of data, and in the following, reliability and validity of data is discussed, as are the measures taken to increase the credibility of the research.

Reliability is described as the degree to which the data collection techniques and analysis processes will yield consistent results if reproduced (Saunders, Lewis and Thornhill, 2009, p. 156). Although this is impossible to guarantee, in particular, for qualitative research, reliability of the findings is sought increased by describing interview situations as well as interview techniques used (cf. section 8.1), by reproducing all the different types of interview guides, and by giving access to the actual audio recordings (cf. appendix 1).

Validity refers to the extent to which the findings are really about what they appear to be (Saunders, Lewis and Thornhill, 2009, p. 157) – in this case, whether the findings are in fact about the Brazilians' motivations for higher education, studies abroad and their perception of Denmark. No causal relationship has been sought tested at this explorative stage of the study, ensuring an

openness to the answers provided by interviewees. With regards to external validity, the study is focused on Brazilians' choice of higher education only, and can hence not be generalized to apply for all populations.

5. Delimitation

Despite Top Talent Denmark's inclusion of both partner universities and companies, the thesis has been delimited to focus on the attraction of Brazilian students to Danish higher education, as an additional focus on Danish companies would entail the inclusion of an extra theoretical field, employer branding, thereby exceeding the time and space constraints of the thesis. The rationale for deciding on the segment of Danish higher education instead of Danish companies is that a successful brand for Danish higher education will not only attract Brazilian talent to Danish universities, but will also increase the chance of Brazilian talent choosing Danish companies *upon* graduation, as they will at this point already be acquainted with the Danish culture.

Beyond this overall delimitation of the research topic, a few delimitations *within* the chosen research topic have been necessary. First, the research has been delimited geographically to Brazil (excluding China) and furthermore to the area around Brazil's biggest city, São Paulo. A few interviews have been conducted with students from other cities than São Paulo, but the majority has been found *in* São Paulo. This has mainly been due to network constraints, as it has been easier to find relevant interviewee prospects in the city, where ICDK itself is located, but also because many of Brazil's best universities are found here, and hence talented students. Second, the research has been delimited with regards to university representation, selecting students only from the best Brazilian universities. The bulk of students come from the biggest university in São Paulo, USP. Students with different study backgrounds, however, have been included to ensure a greater diversity in answers (cf. appendix 3.1). Third, the research has been delimited with regards to timeframe, concluding based on a snapshot study, when in reality the nature of motivations, perceived barriers, and country image change over the course of years, arguing for a longitudinal study – which has not been possible within the timeframe set for this thesis.

6. Case Study: Innovation Centre Denmark and Top Talent Denmark

The Idea Behind Top Talent Denmark

Innovation Centre Denmark first launched the Top Talent Denmark project in Shanghai in 2011 with the aim of attracting more talented Chinese students to study in our Danish universities and work in Danish companies with local affiliates in China.

Companies and Danish institutions for higher education are this way invited to participate in Top Talent Denmark, which in turn shall generate value to these stakeholders through attracting talented employees and fee-paying students.

According to Lars Christensen (2014) – the Danish Innovation Attaché in Shanghai and co-developer of Top Talent Denmark – the project was laid out as a *marketing platform* from which a common Danish brand for education and careers is to be established – and not an actual program where students can apply.

Financial Setup of Top Talent Denmark

Due to the strategic relevance of the platform for Denmark's future competitiveness, it has been decided from the Ministries' sides to fund a startup phase of 1½ years, providing ICDK with both the funds and autonomy to develop the program. After the government-funded start phase, the idea is that Top Talent Denmark must have reached a point where it can create enough value for its stakeholders for them to be willing to pay for participation, i.e. funding the platform.

Expansion of Top Talent Denmark

As indicated above, in 2013 the project was extended to also cover Brazil, similarly with the objective of attracting Brazilian talent to Danish higher education and careers, and in 2014/2015 the idea is to launch the Top Talent Denmark platform in India as well. The reason for this steady expansion of the platform can be found in the government's Growth Market Strategy from 2012 and more recently in two reports on Denmark's internationalization (2013/2014).

Top Talent Denmark in Brazil

Top Talent Denmark in Brazil comprises of a total of 16 stakeholders, hereof seven Danish universities (AU, AAU, CBS, DTU, KU, RUC & SDU) and nine Danish companies (Coloplast, GN Resound, Grundfos, Leo Pharma, Lundbeck, Maersk, Novozymes, Novo Nordisk & Widex).

The project description by ICDK São Paulo clarifies some overall objectives of the platform, and in particular it states that Top Talent Denmark in Brazil must aim at:

1. Increasing the **visibility** of Danish universities and companies in Brazil
2. Increasing the number of Brazilian students who – especially on master's and PhD level – apply for **full degree or exchange** on Danish universities
3. Increasing and easing Danish companies' **recruitment** of Brazilian talents for positions and careers in both Denmark and Brazil

In this sense, the overall aim of Top Talent Denmark is the same in Brazil as in China, but as the Brazilian target audience and educational system are different from the Chinese (Lars Christensen, 2014), the means by which the Innovation Centre is trying to attract talented students differ in some aspects. TTDK's project leader in Brazil, Signe Stokholm (2014) highlights the social media strategy as a good example of different implementation in Brazil and China. Whereas Brazil is the country with second most Facebook users in the world, Facebook is not allowed in China, resulting in different online approaches for the two markets.

Figure 6.1 Four Pillars of the Top Talent Denmark Platform

Website (www.toptalentdenmark.com.br)
- Website targeted specifically at Brazilian student/professional prospects
- Site contains information on both study and career opportunities for Brazilians in each of the participants' organizations

On Site Events
- Denmark Day for Danish stakeholders to meet with potential future students or employees

Facebook site
- Important touch-point as Brazil is second to the US in number of Facebook users
- In contrast to the website, this group is updated several times per week

Alumni Network
- Alumni network of Brazilian students having studied in Denmark

Source: Author's own illustration

Top Talent Denmark has now existed for more than a year in Brazil, and the platform is built on four main pillars as illustrated in figure 6.1.

However, despite the successful establishment of the pillars illustrated in the figure to the left, Signe Stokholm (2014) points to some specific challenges that the project faces in Brazil at present moment:

(1) Challenges with regards to attracting the Brazilian students to the Danish education (primarily the full-degree fee paying students).
(2) Lack of collaboration between Danish education institutions and the corporate participants in Top Talent Denmark

It is questionable whether the platform has succeeded in already generating enough value for the stakeholders to continue their participation in 2015, when stakeholder payment will slowly be introduced. However, as can be seen in the subsequent sections, the attraction of international students – not least from growth markets – is a strategic priority for Denmark, as why it will be particularly unfortunate to drop the Top Talent Denmark platform in Brazil.

Denmark – an Attractive Study Destination

The government's Growth Market Strategy (2012) cemented the importance of promoting Denmark as an attractive destination for foreign talent and most recently the Danish Ministry of Higher Education and Science's published the report *Denmark – an Attractive Study Destination* (2014a), pointing to how and why Denmark can and must attract and retain foreign talent. Currently, Denmark ranks only 27 (out 103) countries in terms of influx of qualified foreign labor, and in order to improve Denmark's ability to attract FDI, Denmark must increase the access to *international* talent (Ministry of Higher Education and Science, 2014a). The government's vision is to increasingly focus on attracting fee-paying students from countries outside Europe, particularly from growth markets. The objectives listed in the report are reproduced in figure 6.2 (for concrete measures, see next sub-section).

Figure 6.2 Government Objectives for Attraction of Foreign Talent
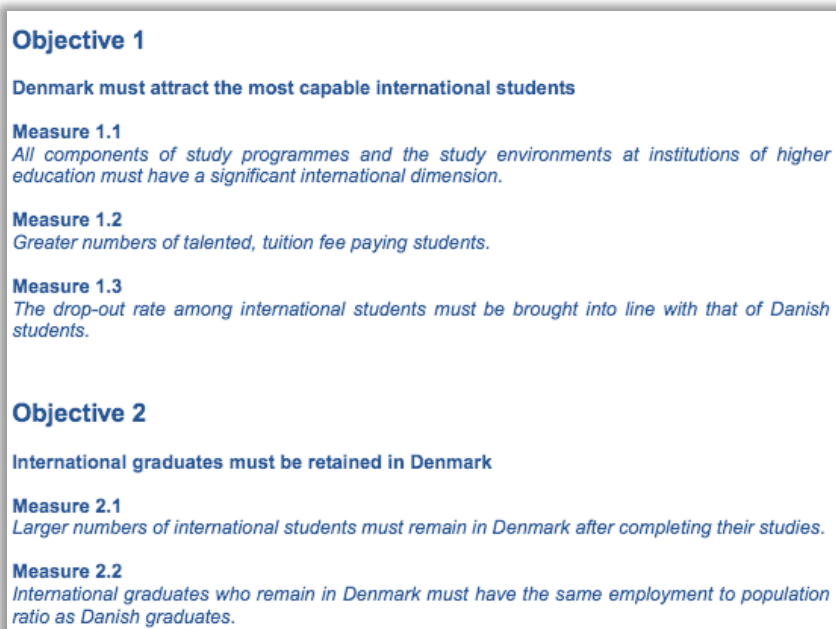
Source: Ministry of Higher Education and Science, 2014a

In conclusion, the report highlights the economic rationale behind attracting and retaining the most talented foreigners to our country, and the Federation for Danish Industry specifies that one highly educated foreigner creates value equivalent of almost two extra jobs. In addition to the economic aspect, the reports point to improved

international orientation amongst Danish students, which would also result from having a more internationally diverse student base at the Danish universities.

Denmark's Current Performance and Concrete Objectives

According to the Ministry of Higher Education and Science (2014a), Denmark welcomed around 9,500 full degree students from abroad in 2012 in addition to approximately 9,200 international exchange students. However, in recent years the division of where these international students are coming from has been changing. An ever-bigger proportion comes from within the EU and EEA countries, whereas the opposite is true for students coming from outside these countries. As illustrated in figure 6.3, this means that in 2012 international full-degree students from outside EU accounted for less than 1/8 of the total number of international full-degree students. If this tendency continues in the coming years, Denmark will face the reality of having its pool of international talent being made up from largely Nordic and European students. The Ministry of Higher Education and Science (2014a) states that by 2020, Denmark must increase the proportion of incoming international students from outside EU from the current 1/8 to 1/5. At the same time, the

Figure 6.3 Foreign Full-Degree Students in Denmark

Foreign Full-Degree Students in Denmark (2012)

- Number of foreign students (EU/EØS)
- Number of foreign students (outside EU/EØS)

1,150 students
12%

8,300 students

88%

Source: Data from Ministry of Higher Education and Science, 2014a

actual number of fee-paying students is to increase from around 1,200 to at least 2,500. Seen in this light, initiatives like Top Talent Denmark are crucial, as targeted promotion of Danish higher education in non-EU countries will be essential to meet the ambitious goals set above. Not least considering the competition that Denmark is facing within Europe. On average non-EU citizens will have to pay around €10,000 per year for a master's degree at a Danish university. In comparison, most European countries are considerably cheaper for non-EU citizens – hereunder Brazilians – as illustrated in figure 6.4.

Figure 6.4 Yearly Tuition Fees in Europe

Yearly Tuition Fees in Europe for Brazilian Students (Master's)
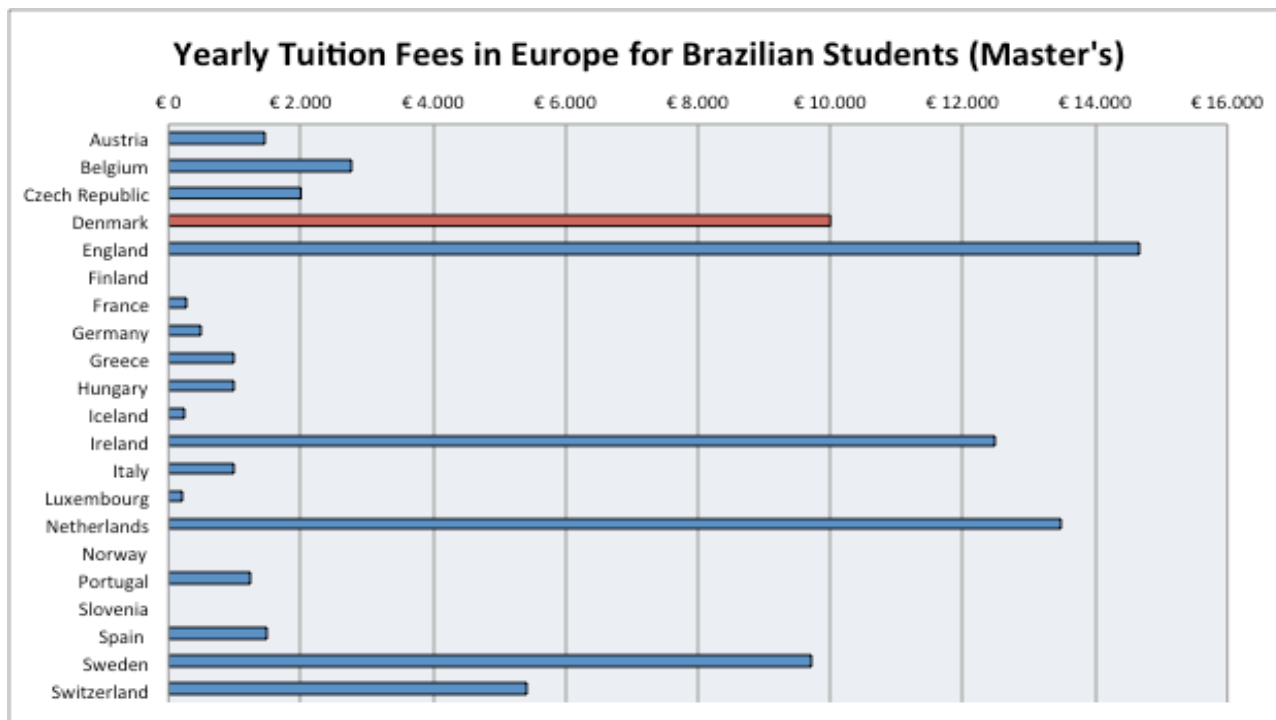
Source: Graphic compiled with data from European university websites (may vary for specific degrees)

To highlight a few examples, Brazilians can go to other Nordic countries (Finland and Norway) without having to pay any tuition fee, or for instance choose to study in top-ranked universities in Austria, Germany or Switzerland for between €500 and €5,400 per year.

Figure 6.5 Student Exchange Between Denmark and Brazil
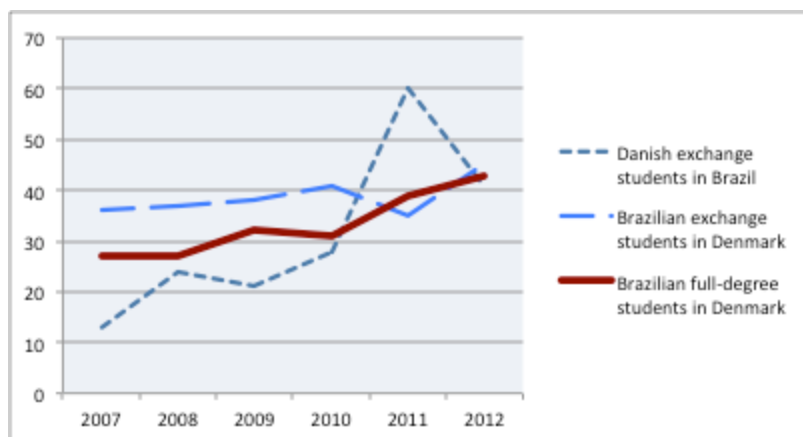
Source: Data from Ministry of Higher Education and Science, 2014

Only Ireland, England and the Netherlands appear to be more expensive than Denmark, and the relatively high price poses an obvious challenge with regards to increasing the volume of Brazilians enrolling in full degrees at Danish universities. With reference to the above, it is not surprising that Brazilians make up less than 4 % of the 1,150 full degree (43 in 2012) students coming outside of EU/EEA countries (see development in figure 6.5).

7. Theoretical Framework

Figure 7.1 lists the steps needed to develop the desired brand for Danish higher education in Brazil.

Figure 7.1 Brand Development Guide
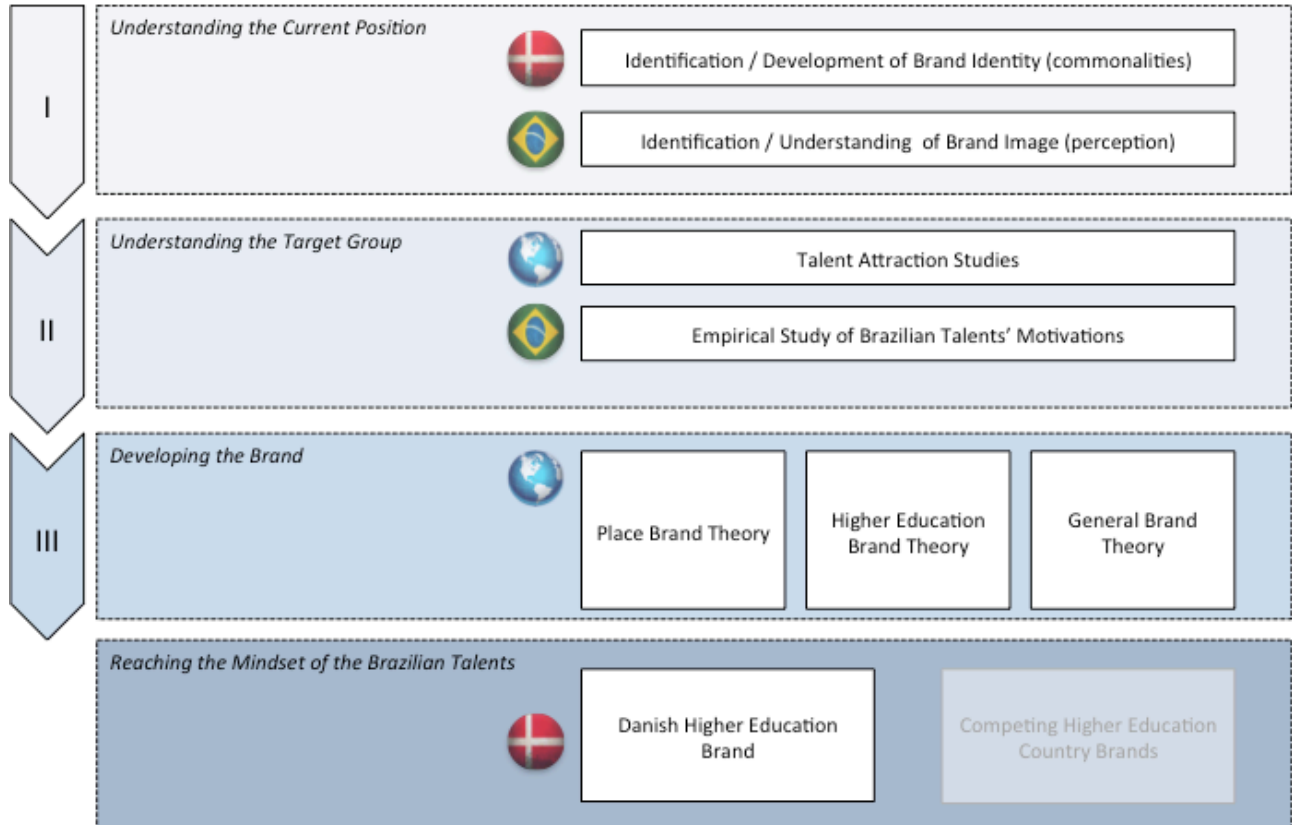
Source: Author's own illustration

As illustrated in the figure, three overall steps have been identified for the realization of a successful attraction of Brazilian students to Danish higher education:

(1) the development of an understanding of (a) what commonalities exist in Danish higher education, and of (b) how Danish higher education is being perceived by the target group

(2) the development of a thorough understanding of the target group's motivations for studies

(3) the development of an understanding of how nations are branded and how higher education is internationalized

Both theory and empirical data collection are requisites in the realization of this plan.

In theoretical terms, the successful development of the Danish brand for higher education will feed on insights gathered from three areas:

Figure 7.2 Theoretical Framework
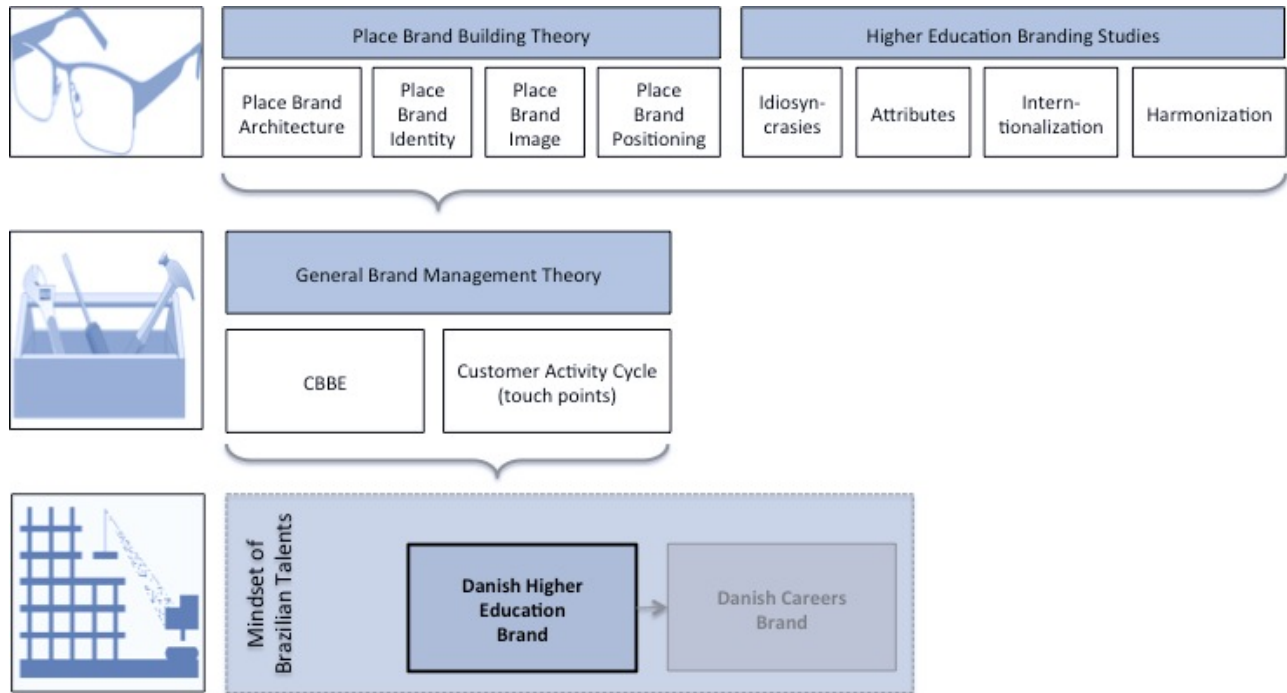
Source: Author's own illustration

(1) Place branding theory
(2) Higher education branding studies
(3) General brand management theory

As explained in section 4 on research methods it is the specific objectives and nature of Top Talent Denmark that have determined the theories that are shown in figure 7.2.

The novelty of Top Talent Denmark is that it is representing the *composite product* of (1) the service "higher education" (and employers) and (2) the nation "Denmark".

Theory exists on branding of higher education. Theory exists on place branding. And general brand management theory exists. *But neither of these theories in isolation can accurately inform the branding of a country's sector of higher education internationally.*

Place brand theory falls short, as it historically has focused on how to attract *tourists* (who usually stay very briefly) and how to brand a destination towards tourists rather than students. Higher education branding theory is traditionally generated from exploratory studies of single universities and lacks the destination aspect in branding a country's higher education as a sector.

And whilst general brand management theories have been widely tested and developed, generating a multitude of useful frameworks for creating strong brands, these general theories are by nature general and not adapted for a composite brand like Top Talent Denmark.

All of the theory can add valuable insights, but neither can comprehensively guide the strategy of ICDK when creating the Top Talent Denmark brand. And this is the rationale for the combination.

Notice the reverse order of specific and general brand management theories. The specific theories on place and education branding are the *lenses* of the theoretical framework through which general brand theory must be viewed. General brand theory, however, has been devoted more attention in research and contains much more studies and theories as to successful brand development. Hence, general brand theory constitutes a valuable *toolbox* for the optimization of the Top Talent Denmark initiative; although only with the knowledge of the specific theories can more general brand management theories be meaningfully adapted and applied to a "product" like Top Talent Denmark (Dinnie, 2008). *Together* the set of theories will aid the construction of Top Talent Denmark.

7.1 Place Branding Theory

From the beginning of the thesis it has been argued that Top Talent Denmark represents a sub-brand to the nation brand, Denmark, namely the *sector* of Danish higher education.

The categorization as a nation sub-brand is a first important distinction to make, as "regular brands" and nation brands differ in various aspects, and therefore must be treated differently. As professor of brand marketing at Birmingham University Business School, Leslie de Chernatony, states, frameworks from general brand theory *are* applicable also in nation branding, but when applied to nation brands, a certain adaptation is necessary (Dinnie, 2008, p. 16). This view strengthens the chosen structure of the overall theoretical framework, where the specific theories are on top. The most important distinction is that more stakeholders usually influence the development of a nation brand than an ordinary brand (Dinnie, 2008).

Adhering to this categorization of Top Talent Denmark as a sub-brand to the mother-brand Denmark, the general brand theory assisting the final brand development will all be seen through the lenses of nation branding – lenses that will be developed specifically for the Top Talent Denmark initiative in the next sections.

In the section below, the exact location of Top Talent Denmark in the brand architecture of the Danish nation brand is illustrated and discussed.

7.1.1 Nation Brand Architecture

Drawing on the brand architecture pyramid for nation brands presented in Dooley and Bowie (2005), Top Talent Denmark is categorized as a so-called *sector umbrella brand* cf. figure 7.3, as it is the *sector* for Danish higher education that is being branded in the Top Talent Denmark project. Additional sectors being actively promoted by Denmark count for instance the tourism sector (visitdenmark.dk), and on a more abstract level, the "investment sector" (investindenmark.dk) and "workplace sector" (workindenmark.dk) (Therkelsen and Halkier, 2008). With different target groups in sight, these sector umbrella brands all share the promotion of Denmark as the place to be. Therkelsen and Halkier (2008) examine the ground for collaboration between such sector brands, with the initial thought that a collaborative effort could benefit from the pooling of resources and economies of scale. It is concluded, however, that collaboration is challenged by the differences in target audience between the sectors, and hence the (lacking) degree to which some of the umbrella brands feel they can benefit from collaborative branding efforts.

Figure 7.3 Brand Architecture for Nation Brand Denmark

Source: Author's own illustration

Dooley and Bowie (2005) identify four existing brand architecture strategies cf. figure 7.4, differing in terms of how strong the link is between the mother-brand and sub-brands. The so-called *house of brands* represents the one extreme, where the sub-brands are given the biggest degree of autonomy and hence have the option of acting completely independently of one another.

In the other extreme, *branded house*, the mother-brand leverages its brand equity to its sub-brands, and all the brands in the portfolio are explicitly linked and hence depend on each other.

The Danish brand architecture "strategy" in its current form can best be described as an intermediary form between the two extremes, and in the words of Dooley and Bowie (2005) as an *endorsed brand strategy*, as shall be explained in the following. It shows from figure 7.3 that there is no common visual identity used by the Danish sub-brands, which would typically be the case for both the sub-brand and branded house strategies, where commonalities in the visuals are used to ensure greater affiliation between the brands in the portfolio.

But although no common visual identity is used for the different Danish brands, an explicit link between most of the sub-brands and the mother-brand can be found in the use of "Denmark" or "Danish" (with the exemption of the brands down at product level), which according to Aaker and Joachimsthaler (2000) classifies it as an endorsed brand strategy. The advantage of using the endorsed brand strategy is that the different sub-brands are *perceptually linked* to the mother-brand, and *enough to transfer the more general values* (Dooley and Bowie, 2005, p. 405-406). At the same time the link is weak enough to give the sub-brands considerable autonomy in terms of which exact values and benefits they want to highlight. For instance, *Invest in Denmark* highlights very different aspects of Denmark than does *VisitDenmark*, and perceives it to be better with the current autonomy allowing for such separate branding efforts, considering the different target audiences (Therkelsen and Halkier, 2008). In the empirical study, it will be important to find out what associations Brazilians have to Denmark, in order to see what knowledge can be leveraged when targeting specifically these Brazilians.

Figure 7.4 Brand Architecture Strategies
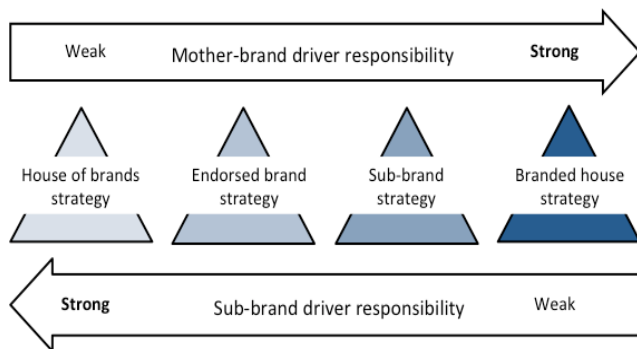
Source: Adopted from Dooley and Bowie (2005) & Aaker and Joachimsthaler (2000)

A next important element to consider in the development of a nation sub-brand is the influencing factors. Both internal and external factors impact the success of a brand (Dooley and Bowie, 2005) as shall be elaborated upon below.

7.1.2 The Two Foci in Nation Branding

Drawing on experience from the branding of for instance South Africa, it will be important for the success of ICDK's branding attempts to have two target groups in mind rather than the obvious *one*.

Brazilian target group: It is hardly surprising that to attract Brazilian talented students to Danish higher education institutions, these prospects must be addressed.

Danish target group: But whereas "regular" brand managers have a relatively high degree of control over the brand they are selling, ICDK is in a somewhat different situation. In this situation, the brand comprises of seven individual and distinct universities, hereunder both management and employees (see more on this in section 7.1.3 on identity-image gap). The Top Talent Denmark brand must convey a *common* set of product qualities from the seven participating universities, and

these product qualities must be identified and communicated. In addition to communicating these traits to the Brazilian student prospects, it is relevant to communicate the identified set of qualities of Danish higher education to each of the participating universities in order for them to live up to the brand promise (Dinnie, 2008). Professor Leslie de Chernatony offers an idea as to how key stakeholders (here the participating universities) can be involved in the nation brand development and management (Dinnie 2008, p.16-17). He suggests that the relevant stakeholders (i.e. the seven universities) are asked to give their view on three central elements to the nation sub-brand:

(1) The desired long-term future of Danish higher education

(2) The purpose of Danish higher education and

(3) The values in Danish higher education

Subsequently, the answers to those questions shall be reviewed and used to reach a consensus vision of the Top Talent Denmark brand.

7.1.3 Brand Identity and Brand Image

The two target groups described above also imply a further important distinction in the brand development – namely the distinction between the brand identity and brand image. Whereas the identity resides with the universities, the image resides with the target group. Both components are focal to understand when developing and nurturing both product and nation brands.

Brand Identity

Brand identity is the first critical element to address by Top Talent Denmark, as argued by Kapferer (2008, p. 125): *"… if one wishes to be perceived, one needs to know how to define oneself"*. Kapferer (2008) argues that by not proactively deciding on a brand identity to be communicated to stakeholders, one automatically leaves the construction of one's image to others – to competition. Hence, understanding the components of brand identity will be imperative for Top Talent Denmark. Numerous views in the brand literature exist on exactly what elements brand identity comprises of, and Dinnie (2008) has synthesized the different views to one that is useful for nation brands, including eight components: (1) brand vision, (2) brand scope, (3) brand name, (4) codes of expression, (5) everyday behavior, (6) points of difference, (7) narrative identity and (8) brand ideology. This list of brand identity elements can be used as a guideline in developing a strong brand identity, but as Dinnie (2008) stresses, a rigid ticking off the boxes above should not be at the cost of creative inputs to the brand identity development. Storytelling is emphasized as a

particularly powerful tool in the construction of a strong brand identity (Elliott and Percy, 2007), and as for nations and sub-brands to nations, the strong cultural and historical background serve as the ideal foundation for creating convincing stories.

In the analysis section, the brand identity of Top Talent Denmark shall be further assessed.

Brand Image

In the case of ICDK's Top Talent Denmark, the image of Danish higher education resides with the Brazilian students. And as Dinnie (2008) suggest, several factors may influence the impression that is given to the target audience, some of the most conventional ones are listed in

Figure 7.5 Influencing Factors on Brand Image
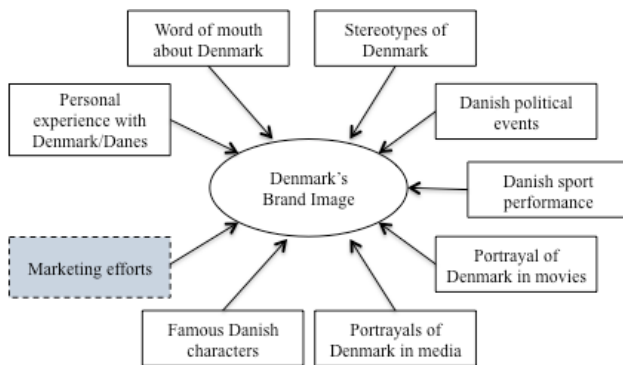
Source: Adapted from Dinnie (2008)

figure 7.5. The factors shown in the figure relate to *a nation's overall* brand image and not as such sub-brands like Top Talent Denmark, but considering the well-documented country-of-origin effect (Bilkey and Nes, 1982; Al-Sulaiti and Baker, 1998), products and services strongly linked to a particular country (inherently the case for Top Talent Denmark and the Danish universities), these image influencers are relevant to list here.

Of the factors in the small illustration on nation brand moderators, ICDK has little control over the majority of them except from marketing efforts, and to some extent word of mouth (by finding Brazilians who have been to Denmark, and mediating their stories to prospects). This limitation in image control constitutes a significant challenge and the requirement for a well-tailored marketing program becomes that much more important.

Keller (2008) proposes that the degree to which the nation image of Denmark affects the perception of the Danish universities depends on (1) the awareness and knowledge of Denmark, (2) the meaningfulness of the knowledge of Denmark and (3) the transferability of the knowledge of Denmark. The existing awareness and knowledge of Denmark is hard to assess before the data collection, but the two latter points (meaningfulness and transferability) have already been addressed: As studying at a Danish university implies living in Denmark, both meaningfulness and transferability of awareness and knowledge of Denmark are inherently high. That awareness and knowledge of the nation brand of Denmark are deemed important for the perception of Danish

higher education suggests that Keller's CBBE model, focusing on exactly awareness and knowledge, can help improve the perceived quality of Danish higher education in Brazil (cf. section 7.3.1).

Identity-Image Gap

At this point both brand identity and brand image have been listed as central elements in a successful brand development for a nation (sub-) brand. When there is dissonance between the nation brand identity and the nation brand image, a so-called identity-image gap exists (Dinnie, 2008). Hatch and Schultz (2001) argue that in order to create and sustain a strong brand, such gaps must ideally be eliminated completely. Their longitudinal study of 100 companies from different countries has resulted in useful guidelines as to how to create a brand in harmony. It is helpful to split the brand identity construct as presented in the previous section into two distinct elements that Hatch and Schultz use, i.e. vision and culture. Vision is explicitly mentioned as part of the brand identity (and brand ideology can be argued to belong to Hatch and Schultz' use of vision too), and culture is represented mainly in "everyday behavior". The reason to divide the brand identity this way, is that vision and culture are driven by two different constituencies – vision by the Ministry of Higher Education and Science and the top level of the universities, and the culture by the university employees. Image is driven by a third constituency, namely the external stakeholders; the Brazilian students. This view on brand development refines our ability to better align the three drivers of the brand success. There need to be an alignment between (1) vision and culture, (2) image and culture and (3) image and vision. This implies that for Top Talent Denmark to become and keep a strong brand, ICDK must ensure that the management's vision and corporate culture are aligned at the participating universities, i.e. that the brand identity is in harmony, and simultaneously that this identity is successfully transmitted to the brand image residing in the minds of the Brazilians. The importance of having supportive leaders with a clear vision, as well as internal support (i.e. a culture that backs up the vision) is furthermore highlighted as key factors for successful university brands (Chapleo, 2010). Hatch and Schultz (2001) provide a toolkit of simple but useful questions, used to identify gaps in identity (vision & culture) and image (cf. appendix 4). The questions listed in appendix 4 have implications for the type of information that need to be gathered in the data collection, and specifically they require an involvement of all three constituencies, i.e. university management, university employees and the Brazilian student prospects. With the empirical data collection it will be possible to determine whether any such gaps exist in the case of Danish higher

education, and if so, to what extent. Only with this knowledge can the positioning and development of an effective marketing program be developed.

7.1.4 Nation Brand Positioning

As demonstrated in figure 7.6, a successful brand positioning is a prerequisite for a brand to reach consistency between brand identity and brand image (Kavaratzis & Ashworth, 2005). Keller, Sternthal and Tybout (2002) specifies this claim, stating that the brand building process cannot be initiated before a clear brand positioning is established. Keller's (2008) definition of positioning includes two main elements: (1) defining the target market, i.e. *where* the company wants to compete and (2) choosing a differential advantage, i.e. *how* the company wants to compete. The first part of defining *where* to compete entails a very important but often forgotten part in brand positioning, namely establishing points of parity (Keller, Sternthal and Tybout, 2002).

Figure 7.6 Relation Between Brand Identity, Positioning and Image

Brand Identity
↓
Brand Positioning
↓
Brand Image
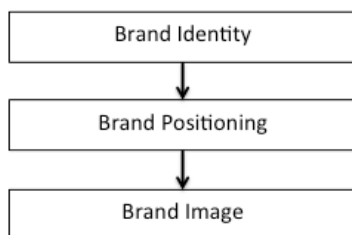
Source: Adopted from Kavaratzis and Asworth (2005)

It is argued that effective brand positioning starts by establishing a frame of reference, signaling what overall goal the consumers can expect to achieve from using the brand. Only with a clear frame of reference can the types of associations that will work as points of parity and difference respectively be identified. While it is important not to forget the frame of reference and points of parity, no positioning will bring a product far without compelling points of difference. Dinnie (2008) warns against a commoditization of nation brands, which is the result of the plethora of undifferentiated claims of what a country has to offer. It is imperative to develop strong differentiators that truly do distinct one country's offering from those of others. Where country brands on the "mother-brand-level" face the challenge of choosing and accentuating distinctive features without alienating any of the many different stakeholders, a sub-brand like Top Talent Denmark has the clear advantage of a very narrow target group. Naturally, being part of the Danish overall brand architecture, Top Talent Denmark must still be positioned in a way that stays true to the mother-brand of Denmark, but doubtlessly the positioning of Top Talent Denmark enjoys more degrees of freedom than the positioning of Denmark. Keller, Sternthal and Tybout (2002) argue that for points of difference to create strong, favorable and unique associations (cf. image) they must be both desirable and deliverable by the organization. That is, ICDK needs to identify the motivations of the Brazilian student prospects in order to craft *desirable* points of difference and at the same

time understand the capacity of the participating universities, so that the points of difference can be *delivered* too. The basic goal of establishing a strong brand positioning is a competitive edge over the competitors. Whilst the carefully chosen points of difference ideally result in such competitive edge, to be sustained over a longer period of time, they must be more than desirable and deliverable. Barney's (1991, 1995) work on competitive advantage is helpful in understanding what it takes to develop sustained competitive advantage. Desirability is one of the four key elements that Barney (1991) outlines (compares to "valuable"), but in addition to being valuable (and deliverable, cf. Keller), the ideal points of difference must too be rare, inimitable and non-substitutable – that is, hard to copy by competing countries on the international marketplace for higher education.

7.2 Higher Education Branding Theory

To strengthen the understanding of the service that Top Talent Denmark is branding, this section shall discuss (1) the idiosyncrasies of higher education, (2) the attributes of higher education, (3) the internationalization of higher education, (4) examine brand harmonization within higher education, and finally (5) review studies on motivations for and barriers to studies abroad.

7.2.1 Idiosyncrasies in Higher Education

Higher education as a service is special in many ways, and in order to know how to best develop the Top Talent Denmark brand, it is necessary to understand these peculiarities and specific challenges. Cambridge (2002) and later Pinar et al., (2010) offer a first interesting reason as to why branding of educational services is particularly challenging, namely the lacking clarity of who precisely the customers are. One perspective on the service of higher education is to see the students as inputs (raw materials), the graduates as output (the employable product) and *companies* as the customers tapping into the pool of finished graduates (Pinar et al. 2010). Other views on the customers of higher education include also the *government,* which is dependent on the knowledge for the future success in the society, *parents* to students and finally *students* themselves. This peculiarity of the university service calls for branding efforts targeted at different audiences, and it is clear that ICDK must consider this characteristic when targeting the Top Talent Denmark initiative. For the purpose of branding higher education, most studies however agree that the core audience/customers and consumers are the students (Ivy, 2008; Ng and Forbes, 2008; Pinar et al., 2010).

Temple (2006) highlights further three peculiarities of universities as organizations: (1) the customers (taken as students) are doing a great deal of work themselves (2) the product offering is

changing rapidly and (3) there is little shared understanding amongst the workforce as to what the organization should try to achieve (employable graduates, remaining solvent, publishing more, etc.). These characteristics must therefore be considered in the branding of higher education, both in terms of internal clarity on vision and in terms of clear communication to the external stakeholders on the particular product offering.

As for the product offering, Ng and Forbes (2009) highlight the *co-creative* element in the learning experience, where – as mentioned above – the student is doing a great deal of the work him/herself. This means that that the outcome for a student can be everything from *mundane and monotonous* to *transformative* (Ng and Forbes, 2009). Furthermore, the education service is particularly hard to brand, as the core service itself – the learning experience – is *emergent, unstructured, interactive* and *uncertain* (Ng and Forbes, 2009). One solution to university branding is offered by Cambridge (2002), who argues that educational products must develop a relationship between the schools and their customers. In order to do so, the brand must appeal to the customer on both a *rational* and *emotional* level, by developing a brand personality that combines both functional attributes and symbolic values of the brand, cf. section below.

7.2.2 Attributes of Higher Education

From having reviewed numerous academic articles on higher education seen from an international perspective, the table below has been constructed, synthesizing the most prominent attributes:

Figure 7.7 Attributes of Higher Education (international perspective)

Functional Attributes		Symbolic Attributes
Core Functional Attributes	**Augmented Functional Attributes**	**Examples (cf. emotional appeal)**
• Full-degree programs	• Student life	• Internationalism
• International collaboration	• Sports facilities	• Inclusiveness
• Program duration	• On-campus accommodation	• Multiculturalism
• Curriculum content	• Community services	• Independence
• Class sizes	• Financial aid	• Sustainability
• Language of instruction	• **Destination**	
• Reputation		
• Mode of assessment		
• People – profile of staff & co-students		
• Physical facilities – lecture material, campus appearance, etc.		
• Processes – administrative structure		
• Transferability of qualifications to further education/work		
• Graduate career prospects		

Sources: Gray et al. (2003), Cambridge (2002), Curtis et al. (2009), Pinar et al. (2010), Ivy (2008), Ng & Forbes (2009)

Cambridge's (2002) proposal to develop a brand that appeals on both rational and emotional levels supports the idea of looking into Keller's CBBE model for the successful development of Top Talent Denmark, as CBBE works with both the rational and emotional sides in branding.

In addition to classifying the attributes of higher education into functional and symbolic, they can be further categorized as either *core* or *augmented* components – the core components being the *key benefit-generating* attributes (Medina and Duffy, 1998). Whether an attribute is key benefit-generating will not always be unambiguous, as this will ultimately depend on the individual students' needs – which are *not* the same across the board (Ng and Forbes, 2009). For mature markets (which the market of higher education can increasingly be seen as) the brands' core attributes are often highly similar to those of competitors, leaving the augmented attributes as the means to achieving product differentiation (Ng and Forbes, 2009). Again, it can be discussed whether the "attribute of destination" is a key benefit-generating attribute (i.e. core) or an augmented one in the market for international higher education.

The mapping of these attributes matters, as it is with the right combination of attributes that a university can create an experience that is *genuinely able to satisfy the needs of the student* (Ng and Forbes, 2009). For ICDK, this implies that to successfully develop the Top Talent Denmark brand they must understand (1) *which of the attributes* are most salient to Brazilian student prospects and (2) the current offering and general ideology behind the Danish universities. The goal must be to match the demand with the offering. As highlighted in the previous section, the educational service is emergent and uncertain by nature, which too means that expectations can be modified.

Figure 7.8 Fit Between Educational Supply and Demand
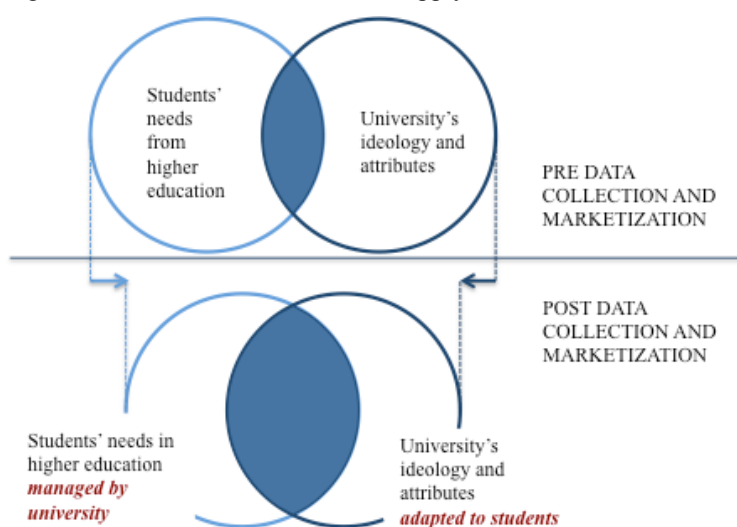
Source: Author's own illustration (cf. Ng and Forbes, 2009)

This suggests that – rather than merely adapting to student needs – universities can and must also manage what attributes *should* matter in the first place (Ng and Forbes, 2009), which enables the universities to stay true to their core ideologies. In figure 7.8, this objective is sought illustrated. The illustration aims to clarify that successful student attraction in the field of higher education depends on moving the two

circles closer to each other, enlarging the dark blue "area of fit". It is clear that for ICDK to maximize the area of fit between the Danish offer and the Brazilian need, both offer and needs must be clearly identified in the data collection process. Subsequently, the match can be established and highlighted in ICDK's marketing efforts.

7.2.3 Internationalization of Higher Education

The degree to which a product/service is suited for internationalization has been argued to depend on (1) the applicability/compatibility of the *product category* (i.e. here higher education) to foreign environments, and (2) the specific firm's ability to incorporate market differences in the composition of the product offering (Medina and Duffy, 1998, p. 226).

These two elements will differ from case to case, and the literature distinguishes between four levels of internationalization, more precisely *standardization, adaptation, customization* and *globalization* (Medina and Duffy, 1998) as illustrated in figure 7.9.

Figure 7.9 Four levels of internationalization
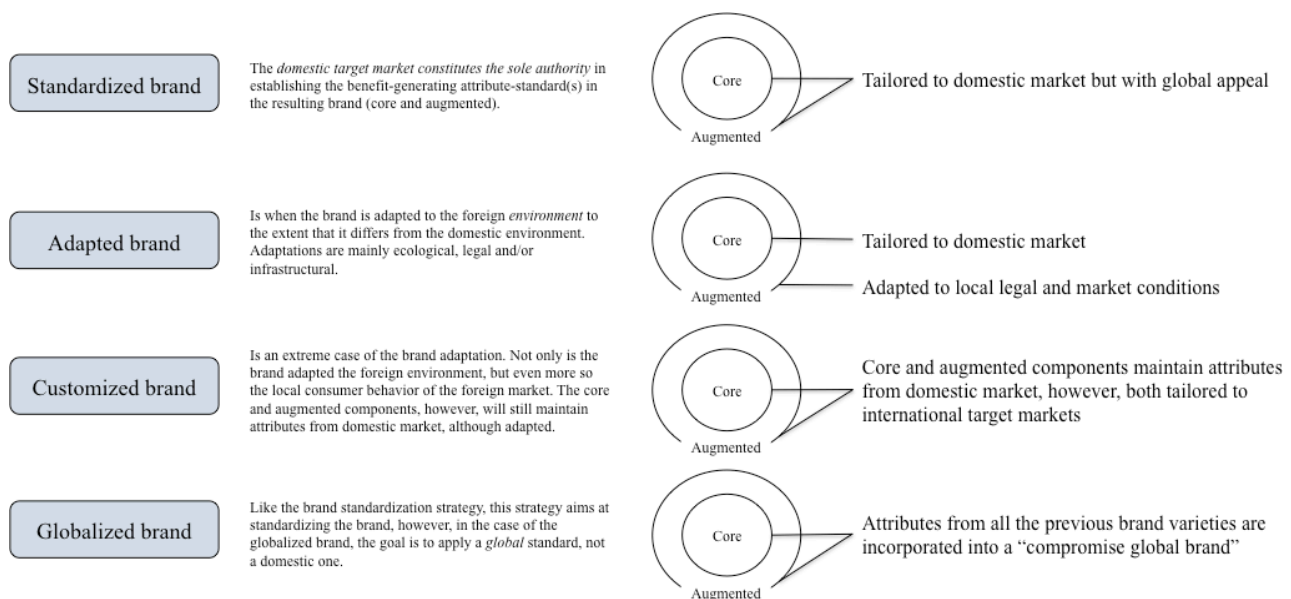
Sources: synthesizing the information from Medina and Duffy (1998)

According to Gray, Fam and Llanes (2003) who have looked at the internationalization of higher education using Medina and Duffy's definitions, most universities are applying either the standardized brand strategy or the adaptation brand strategy. Truly customized strategies for universities entail the danger of inconsistent brand positioning in their different target markets, whereas the globalized strategy requires an extensive experience with global student needs through having offered numerous courses offshore and distance education.

As suggested by Gray, Fam and Llanes (2003) by seeking to accommodate the needs of new international target audiences, the brand positioning is at risk of being inconsistent, potentially harming the attraction of existing core markets. This suggests that the idea of managing the attributes that *should matter* (cf. Ng and Forbes, 2009) to different target audiences is a very important element in the internationalization of higher education. This does not imply that the adaptation of university offerings becomes obsolete; it is just acknowledging the fact that such adaptation has its limitations in the area of higher education, where brand extensions are less applicable than in the world of e.g. fast moving consumer goods.

Concretely, higher education institutions can internationalize through setting up overseas campuses (= FDI), degree exporting, licensing strategies and student importing (Gray, Fam and Llanes, 2003); the latter being the case of Top Talent Denmark. And in relation to the four internationalization strategies described, Top Talent Denmark is at present moment applying the standardized strategy. Neither core components nor augmented components of the Danish offer are being adapted by the Top Talent Denmark initiative. Instead, it serves as a platform for the participating universities to raise the awareness of the Danish offers to the Brazilian students. The individual Danish universities themselves are adapting the offer slightly to international target audiences (e.g. seen in the differing program fees), however, Top Talent Denmark as a platform is not adapting further to the Brazilian market at present moment.

It is clear, that with thorough data collection, revealing the needs of Brazilian students, it will be possible to adopt a more customized strategy, which exactly is based upon established knowledge of the consumer behavior in the target market. From such data, it will be possible for ICDK to identify both which attributes to accentuate in the Top Talent Denmark program as well as to identify attributes that can be improved in order to better accommodate the wants of Brazilian prospects. The question is to what extent an adaptation of the Danish offer is possible, cf. the discussion above.

7.2.4 Brand Harmonization in Higher Education

Another relevant concept to include in this section on branding of higher education is brand harmonization. To some extent, this is the aim of Top Talent Denmark, to harmonize the profiles of the seven universities to create a strong identity, grasping the idiosyncrasy of Danish higher education at large. But brand harmonization in the educational world can be troublesome (Hemsley-Brown and Goonawardana, 2007). Hemsley-Brown and Goonawardana (2007) have looked at the

effects of a brand harmonization of a single university in the UK. The harmonization comprised of an alignment of the vision, mission and values of the schools and faculties under the university, and diminished the autonomy of each of these. The task was imposed by the British Council with the objective of creating a more distinct positioning of the university as a whole. Much like the goal of Top Talent Denmark, which also aims to position Danish higher education stronger amongst international competition. Hemsley-Brown and Goonawardana (2007) highlight a range of concerns attributed to such brand harmonization in higher education, most importantly that the schools and faculties with niche markets for target audience lose the autonomy and profile needed to attract these. It is important here to remember what the Top Talent Denmark initiative is about. It is not – and should not become – about changing the vision of the individual universities, but rather about identifying the commonalities that exist from the fact that the universities are all Danish and, subsequently, use these commonalities to craft a clear identity that differentiates what Danish higher education has to offer compared to other international offerings. Hence, acknowledging the dangers that come with brand harmonization as outlined in Hemsley-Brown and Goonawardana's case study (2007), Top Talent Denmark must be seen as *an additional layer* that is put on top of the idiosyncrasies that also must exist in each of the seven universities. And according to Gray, Fam and Llanes' empirical study on branding New Zealand universities in Asia (2003) *it is very difficult to separate individual universities from the general national image* (p. 119), suggesting that taking the nation brand as an additional layer, when branding a university internationally, is not a bad idea.

7.2.5 Motivations and Barriers to Studies Abroad

A crucial point to understand when developing a brand for higher education is – as for any product and service – the underlying motivations and barriers experienced by the consumers, here students choosing to study abroad. Whilst primary data collection in Brazil shall clearly define both motivations and barriers experienced by the Brazilian student prospects, this section will give a brief review of existing studies on student motivations and concerns for overseas studies.

One such study is from Chen (2008) who has examined the motivations for studying abroad for three groups of Asian students, doctorates, master students and under-graduate students. In contrast to the motivations for master and undergraduate students, a very significant determinant for doctorates was found to be encouragement from *professors* to pursue foreign education.

For master students the main determinants for the choice of studying abroad include future job prospects, working experience from abroad and language skills.

Finally, the undergraduates' choice of studying abroad was highly influenced by the family decision. Another interesting finding from Chen's (2008) study is that some countries generally view studies abroad positively (China, Korea and Taiwan), others negatively (Japan).

Wang (2004) further classifies the motivations of students to study abroad into three overall types: (1) academic (2) career and (3) experiential. Academically, studying abroad may allow studying at an internationally reputed university, and in any case it will constitute a new and different learning environment for the student with both the advantages and challenges that this brings. In terms of career, studying abroad is often regarded positive, as the international experience increases the graduates' ability to operate in a global environment (Townsend and Poh, 2008).

But if for instance the chance of claiming a good job upon graduation increases with studies abroad on the CV, then why wouldn't much more students choose to do so? Various barriers play a role in reducing the willingness of students to move to other countries for studies.

Cultural differences – i.e. differences in values, beliefs, attitudes and norms – constitute one of the main barriers to studies abroad. It is not everybody that is keen on living and studying in a country where things are done and viewed differently from in one's home country. In the universities a sub-culture to the national culture exists, and this obviously comes very close to international students, who may experience big difficulties in adjusting to academic requirements and new study methods (Townsend and Poh, 2008). Culture shocks frequently occur in such situations and can cause students to experience anxiety, frustration and helplessness (Townsend and Poh, 2008). Sison and Brennan (2012) elaborate on the academic barriers from international studies, and emphasize the difficulties in getting courses acknowledged and transferred back home.

Economic barriers are major in many cases of international studies, and insufficient funds can be the direct cause for students not going to study in an elsewise-preferred country (Sison and Brennan, 2012). For Brazilian students to go to Denmark there will be major expenses in tuition fees (cf. figure 6.4), travel expenses, accommodation, and general cost of living, which is also comparably high. In addition to these expenses there is the opportunity cost of working in the home country, which most often is not possible in the host country (Sison and Brennan, 2012).

Language barriers constitute another significant barrier, as the lack of local language skills can hinder international students' sociocultural adaptation and academic achievements (Townsend and Poh, 2008). In relation to the language barriers, social issues can arise when being far away from the social network at home (family and fiends).

Finally, Sison and Brennan (2012) mention political barriers, by which is meant the barriers when some study destinations are having little support from the home country, and where the students themselves must therefore make their own arrangements to facilitate the international study.

In sum, it can be expected from the data collection with the Brazilian students, that certain motivations and equally so barriers exist for studying abroad (and for studying in Denmark).

7.3 General Brand Management Theory

As a means of strengthening the final brand development, this section shall review the concepts of (1) consumer-based brand equity and (2) touch point management.

7.3.1 Consumer Based Brand Equity (CBBE)

The country brand is in competition with other countries: it must be seen, perceived to be different, credible and attractive (Kapferer, 2008, p. 125). This statement by Kapferer may sound very simple, but at the same time is straight to the point, and, when decomposed, justifies looking to the CBBE model as developed by Keller (cf. figure 7.10).

The first part of the quote "it must be *seen*" implies that the nation brand must generate first and foremost awareness, the first branding objective, which is located at the bottom of the CBBE pyramid. The second part of the quote "must be perceived to be different and credible" refers to the second branding objective and layer in the CBBE pyramid, i.e. points of parity (credibility) and points of difference. Finally, the last part of the quote "must be attractive" appears to fit the top branding objectives and layers of the CBBE pyramid, i.e. positive reactions and ultimately loyalty.
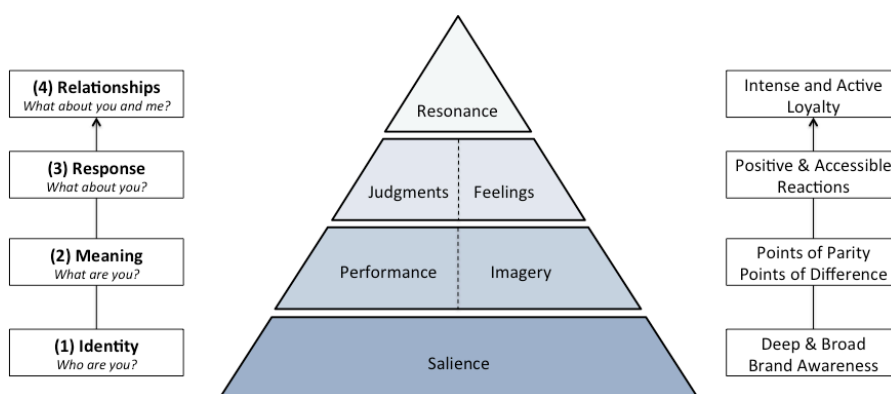
Figure 7.10 CBBE Pyramid

Source: Keller, 2008

As was discussed in the methodology section, this view on branding regards brand equity as a construct that can be established in the minds of the consumers by effectively influencing the so-called building blocks

of CBBE. That is, cf. the positivist view, the influencing of the different building blocks work in a "law-like generalizable" way (Saunders, Lewis and Thornhill, 2009), and when effectively developed, brand equity will result in the mind of the consumer. The applicability of CBBE to nation brands is supported by Konecnik and Gartner (2007) and later by Boo, Busser and Baloglu (2009). The concept of customer-based brand equity and its different elements are deemed particularly relevant for nation brands, by serving as effective measurement parameters (Konecnik and Gartner, 2007; Boo, Busser and Baloglu, 2009).

Following the amendments of CBBE to destination brands made by Konecnik and Gartner (2007), four sub-constructs to destination brand equity are identified and a fifth one is added in 2009 by Boo, Busser and Baloglu (2009): (1) Destination Brand Awareness, (2) Destination Brand Image, (3) Destination Brand Quality, (4) Destination Brand Value and (5) Destination Brand Loyalty.

Knowing the different building blocks for destination brands, organizations like VisitDenmark or ICDK have much better conditions for developing a strong brand, as the sub-constructs concretize what their marketing efforts must aim at achieving:

(1) Awareness of Denmark and Danish higher education's offerings is the prerequisite for the attraction of Brazilian students, but not enough.

(2) Brand image is – as already discussed in the section on "nation branding" – regarded *central* to the attraction of visitors to a country and here, higher education. Familiarity is listed as one of the most influential factors on a nation's image (as measured in personal experience with the country). Numerous studies directly show a positive correlation between familiarity and imagery held of a country (Konecnik and Gartner, 2007; Boo, Busser and Baloglu, 2009).

(3) Brand quality regards the perceived quality of Danish higher education by the Brazilian student prospects. Such quality may be derived from rankings and from the extent to which Brazilians perceive Danish universities as being capable of performing on the attributes they find valuable.

(4) Brand value is highly linked to the concept of brand quality, as it portrays the perceived *balance* between an offer's price and utility (Boo, Busser and Baloglu, 2009). Hence, for higher education, the perceived value depends on the balance between the perceived quality of Danish higher education and the price (i.e. tuition fee, living expenses, travel expenses, etc. – subtracting any scholarships). Student prospects will choose the offer where the perceived value is the highest, making it imperative to increase perceived quality above the price.

(5) Finally, **brand loyalty** in higher education branding refers to how previous experiential familiarity with a country's education system affects the intention to return for further education – or possibly job search. The importance of experiential familiarity is also highlighted by Kasper Dam Schultz (2013), International Program Manager at CBS, as the main method for attracting full-degree students.

For the constructs above to become valuable, it logically follows that an organization like ICDK must know where in the brand building process it is, in order to know how to continue. This can only be answered when a deeper understanding of the Brazilian target group has been developed.

7.3.2 Touch Point Theory
Customer Activity Cycle

Vandermerwe (2000) and Dhebar (2013) argue that conventional marketing strategies are too easy for competition to emulate and subsequently improve upon. Throughout the previous theory sections on place and higher education branding, it has been clear that there are several challenges for the creation of a comprehensive nation sub-brand in education, one of these being the identification of customers and their needs. This advocates not only for careful brand creation but also for holistic targeting efforts. Vandermerwe (2000) proposes that by mapping the *entire* cycle of activities that a customer goes through in relation to the purchase and consumption of a certain product, a company can develop an integrated customer experience that is difficult for competition to readily emulate and advance. The core is to identify the points where the universities / Top Talent Denmark touch and are touched by the customers (most relevant here the Brazilian student prospects). These points can be of human (e.g. lecturers), product (e.g. curriculum), service (e.g. international office), communication and electronic (e.g. websites) nature (Dhebar, 2013).

Vandermerwe (2000) states that by focusing on the entire customer activity cycle (i.e. outlining all customer activities related to pre, during and post consumption) an organization can increase customers' longevity of spending, the breadth and depth of spending and the diversity of spending. In sum, by improving the customer experience from the very initial problem recognition to post-consumption, the organization can optimize customer loyalty, and this way increase revenues without having to increase revenue per product.

Beyond the mapping of customer activities related to Brazilians' consumption of higher education (see analysis), ICDK must look at the touch-points at each of the stages (pre, during and post) from

the customers' perspective as well as from its own and the participating universities' perspective, to arrive at a useful customer touch-point blueprint (Dhebar, 2013):

Figure 7.11 Touch Point Blueprint for ICDK and Top Talent Denmark

Customer Perspective on Touch Points	**ICDK & University** Perspective on Touch Points
• *Who* – from the customer side – will be interacting with ICDK and the universities for any given stage in the cycle? • Brazilian student prospect, parents, … • *What* is the customer's preferred touch point at each stage (human, product, service, electronic, …)? • *What* are the customer's functionality needs at each preferred touch point? • *What* does the customer expect from interdependencies across the different touch point modes at different experience stages?	• *Who* – from the supplying side – will be interacting with the customers for any given stage in the cycle? • Professors, administrators, ICDK, alumni, etc. • Given the customer's preferred touch point configuration, *what* is ICDK's/universities' desired functionality at each customer touch point? • Given the customer's preferred touch point configuration, *what* operational and functional interdependencies will ICDK/universities have to manage? • *What* are the resource implications of delivering the customer's and ICDK/universities' desired functionalities?

Source: Adapted from Dhebar, 2013

As ICDK and the partner universities obviously have resource constraints and own preferences to the customer touch point architecture, it is likely that the final structure will be a compromise between the two perspectives. In order to *ensure the centrality of the customer in the compromise process*, the final architecture should be tested – preferably with sample customer groups, or alternatively by a number of people internally in ICDK (Dhebar, 2013, p. 201).

At this point, all the reviewed theory has enabled a strong theoretical foundation upon which the Top Talent Denmark brand can be optimized. But as has been emphasized numerous times in the theory section, this optimization cannot be take place before a more profound understanding of the most salient stakeholders has been developed. This leads to the next section, where data from the Brazilian students will bring about the last building block to the "brand construction site", allowing for the final analysis and brand development process to begin.

8. Primary Data

8.1 Data Collection

As pointed out in the methodology section, the development of the Top Talent Denmark brand has a largely exploratory nature, as why in-depth interviews serve as useful method of data collection.

In-depth interviews have been used for the three most salient stakeholder groups, as further elaborated upon in the sub-sections below. Common for all 19 interviews is that a convenient and comfortable setting has been chosen for the conduction of the interviews, as relaxed interviewees give access to the best data (Hackley, 2003, p. 77). In order to stimulate interviewees to be talkative, i.e. generating most possible data, non-threatening and open questions have been used in the beginning (Kvale & Brinkmann, 2009, p. 148). In all interviews, the so-called laddering technique (Wansink, 2000) has been used as a tool to go beyond the immediate responses by the interviewees. Pausing and positive reinforcement have been used too, as deliberate strategies for making the interviewees elaborate on their immediate responses (Brymans and Bell, 2000). In the sub-sections below, more specific descriptions of how the different interviews have been structured.

Ministry Representatives

To understand the core purpose of Top Talent Denmark, interviews have been conducted with the two assigned representatives from the Ministry of Higher Education and Science. One with the co-creator and current head of the Top Talent Denmark project in China, Lars Christensen, and the other with Signe Stokholm, who was hired as project manager to launch the Top Talent Denmark initiative in Brazil. The interview guides have been semi-structured and targeted to each of the different cases (China and Brazil) – see appendix 1.1 and 1.2.

As these interviews serve merely as background information for the case study, the interviews have not been transcribed but instead referred to through interview notes. For these, consult appendix 2.

In addition, it should be noted that information and knowledge of the Top Talent Denmark project in Brazil has been continuously accumulated through daily contact with the project during my 5 months' internship at ICDK in São Paulo from the end of January to the end of June 2014.

Danish Universities

Out of Top Talent Denmark's seven partner universities (cf. case study), in-depth interviews have been conducted with the responsible representatives from four – CBS, KU, DTU and SDU (Odense) – as it is ultimately their product that Top Talent Denmark seeks to brand.

All four interviews have followed the same overall interview-guide, however, adapted to the particular university and to whether it had participated in Top Talent Denmark-related activities in Brazil or not. Like for the two interviews with the representatives from the Danish Ministry of Higher Education and Science, interview notes of these four interviews can be found in appendices 2.3-2.6.

Brazilian Students

Finally, 13 in-depth interviews have been conducted with Brazilian students from different educational fields and at different levels of the education system.

From the beginning, this has been considered the most salient part of the data collection for this thesis, both seeing that it is the Brazilian students that make up the target group of Top Talent Denmark and seeing that this is where ICDK mainly lacks access to knowledge.

As the goal of Top Talent Denmark is rather broadly defined in terms of attracting more Brazilian students, and as the focus of the participating universities differ as well, interviewees with different study backgrounds have been selected. Backgrounds vary on "two + one" important dimensions: 1) field of study, representing fields relevant to all participating universities and 2) level of study, having interviewees range from current bachelor students with aspirations to do a master's degree at some point to master students with PhD aspirations, and finally also a PhD scholar with post-doc aspirations. In addition, the interviewees have been selected to present an image of Denmark as experienced by Brazilians with *little or no* attachment to Denmark (7/13) and as experienced by Brazilians who *have* studied one or more semesters in Denmark (6/13). The interview guides used have been adapted to these two different groups of students, i.e. adapted to whether prior study experience in Denmark exists or not. All interviews have been semi-structured, as a list of predefined themes and questions has been followed, though with focus and follow-up questions shifting in the interviews according to the experience of the individual interviewee. Interviews were conducted in English, and seeing that relevant prospects for Top Talent Denmark must master the English language, only interviewees with good English skills have been selected.

All 13 in-depth interviews (12 hours and 25 minutes in total) have been transcribed, please consult appendix 3 for the full transcriptions. To portray a more precise picture of the interviewees' statements, subtler, non-verbal elements in the interviews have been included in the transcription – such as laughs = [laughs], pauses = …, interruptions = […], intonation = *italics* and body language when necessary (by description). To make sense of the interviews, the transcriptions have been

coded and classified into seven main themes, as listed to the left. The themes represent the most significant topics that emerged in the interviews,

Category List
1. Motivations for higher education
2. Needs and wants for higher education
3. Decision making process for higher education
4. Motivations for studying abroad
5. Perceived barriers for studying abroad
6. Image of Denmark
7. Image of Danish higher education

but going back, the themes ultimately derive from the problem statement, research questions and the chosen theories, as it is these three elements that have been shaping the interview guide and hence the interviews. Despite this structure, the coding and classification has been open to tendencies in the interviews that were not included in the theoretical foundation of the thesis – hence staying true to the exploratory nature of the study, and aiding the generation of practical recommendations for ICDK.

8.2 Results

In order to arrive at the seven main categories or themes, each of the 13 transcripts has been carefully screened, and constructs in each interview identified. In the pages below, the key constructs for each of the themes are presented by means of interviewee quotes.

THEME I: Brazilians' Motivations for Higher Education

The quotes below relate to the Brazilian students' *fundamental* motivations for studying. A variety of reasons emerge in the interviews, however, across the interviews, career opportunities appear as a widely shared reason for higher education, as exemplified in the below:

> *I think I am doing this because of the big newspapers in Brazil [dream employer for her, ed.]. They require the*
> *master.* [Nathalia, B, appx. 3.7]

> *I needed further education. I needed to improve my resume (...) I was working for a telecommunication company*
> *which didn't give me a good salary and I didn't like the job at all, I thought it wasn't meaningful at all, (...) And in*
> *order to switch jobs and to give this leap, I needed something very good on my resume* [Barbara, MBA, appx. 3.13]

That is, the motivation for higher education here lies in its ability to allow the Brazilians to climb – even *leap* – up the career ladder. Higher education is furthermore mentioned as an essential part for the students whose career ambitions relate to teaching and staying in the academic field:

> *Because I have a more academic profile, and always thought I wanted to be a teacher.* [Marcelo, B, appx. 3.11]

Interestingly, some of the students that mention the desire to stay in the academic field, see higher education as a way of life and a way to stay closer to the values they have – as opposed to the values represented by private companies:

(...) and I didn't like the experience [cf. internships in a bank and consultancy, ed.]. I thought that maybe the academic lifestyle would suit me better. It was more a choice of lifestyle than maybe a choice of something else. I wanted to become more a teacher. [Ricardo, PhD, appx. 3.14]

So at the moment I was working for an office... And I wasn't very happy with the values and the... I was expecting more of this, and I was expecting to help more people with my profession (...) And then I decided that I would like to improve my abilities on that, and that I would like to teach people with it. [Ana Claudia, M, appx. 3.9]

In addition to the very common reasons listed above, *staying informed and to keep learning* was also mentioned by the Brazilian students as an important driver for studying:

I am afraid to get lazy at some point and just work and not get up-to-date. Not to get deep knowledge of something. I think it is necessary for life to keep learning. [José Roberto, B, appx. 3.5]

I like being close to where knowledge flows. [Rafael, B, appx. 3.8]

It is furthermore apparent in the interviews that Brazilians often start working after their bachelor (which for most of the interviewees has been taking 5-6 years to complete), giving another view as to what the subsequent master degree can do for them, as stated by for instance Rafael:

I think the master is a good opportunity for that [rethink life, ed.]. After you have worked for some time, after you already have a feeling of things that you like, things that you don't like (...) You can adjust a little bit, and also in a way buy some time to think again, and to get a new start. [Rafael, B, appx. 3.8]

That is, after a couple of years working, a master's degree is seen also as a welcome pause for reflection on life and where to go next.

A final fundamental motivation for continuing in the higher education system appears to stem from the family, although not mentioned explicitly in the majority of the interviews:

My family all have masters and PhDs and all, so I felt I needed to have further education after undergrad. [Barbara, MBA, appx. 3.13]

Summing up, the reasons that emerged throughout the interviews and as seen in the quotations above can be boiled down to five main motivations, see illustration in appendix 5.

THEME II: Brazilians' Needs and Wants for Higher Education

Having examined the fundamental motivations of the Brazilian students, this paragraph shall now focus on the more tangible higher education attributes that are in demand by the Brazilian students. Consistent with the picture provided by Figure 7.7 in the theory section, many different attributes are mentioned as important for a great university – and to a large degree the figure contains the attributes mentioned by the Brazilians. One seemingly salient attribute highlighted by the majority of the Brazilians was *people and culture* – both including teachers and co-students:

> *I can say that the main thing is the human resources they have. So… even when I thought about going abroad for the PhD, I was mainly focused on the kind of people they had."* [Ricardo, PhD, appx. 3.14]

> *Also that people around you are really smart and interesting. (…) A strong community.* [Barbara, MBA, appx. 3.13]

The quotes above give a good picture of the importance drawn to people and culture as mentioned by nearly all the interviewees to the question of *what makes a great university*.

Alongside with people and culture, the *reputation* of a university appears to play a significant role:

> *Reputation, it's got to make a difference in your career.* [Marília, B, appx. 3.6]

> *So for me it was very important – a criteria of elimination – that the university had a good reputation.* [Rafael, B, appx. 3.8]

Other interviewees too point to reputation as an important attribute, the main reason being visibility and hereby the extent to which the university's name boosts the student's CV.

Connected to reputation, the university's *relevance* within a field of study clearly matters a lot to the Brazilians interviewed – both when it comes to full degree program opportunities and general research in the field in question:

> *Well, the most important thing is for the university to have a master's in the area I want to go and study.* [Emmanuel, B, appx. 3.3]

> *Tradition is the first thing, the quality of the teaching, the research, the number of research in the area.* [Marcelo, B, appx. 3.11]

A further attribute that considered important for the students was extensive *access to knowledge* as provided by libraries:

> *I think what's really necessary is a good library for example* [José Roberto, B, appx. 3.5]

First of all, I think it is the infrastructure [access to data, ed.]. (...) Sometimes I find it hard to find some books, or some other resources that they do not have in my university here, so I have to look for other universities in Brazil or abroad. [Ana Claudia, M, appx. 3.9]

In terms of university style, hereunder the style of teaching and facilitating learning, interviewees point to the promotion of *independence and critical thinking* as important elements:

"In Denmark you are responsible for what you need and what you want to do, so this is a very good point." [Erika, B, appx. 3.4]

"It's all about debate – that you are no longer in high school where you just "learn". You really have to think for yourself." [Nathalia, B, appx. 3.7]

Especially the students having studied in Denmark stressed the importance of independence in their interviews, as shall be elaborated upon under category 6 and 7.

But not only strict academic attributes matter to the Brazilians. Also *location* and the degree of *internationalism* has been mentioned by more of the interviewees:

"Hmm, location. I do like the idea of being in a major city where you can explore other opportunities that sometimes are not offered by the university. (...) So location was probably one of the most important ones. I only applied for major cities and cities where I had been before." [Carla, B, appx. 3.2]

"In my case, as I am going outside of my country and all that, it has to be international – I don't want to go somewhere that only has local relevance." [Rafael, B, appx. 3.8]

It shows that location matters in terms of opportunities outside the university's walls, whereas internationalism is highlighted as necessary to create a diverse environment, but also to ensure broad future opportunities – that are not merely connected to the local area. Naturally, it is not all Brazilians that wish to study abroad, but also the ones who most probably will stay in Brazil to continue their path of higher education point to location as being important, only at city/regional level.

Another attribute that came across in a range of interviews was that of financial accessibility:

And… after that [what he mentions as most important for a university choice, ed.] I would consider the possibilities of me to sustaining myself economically" [Emmanuel, B, appx. 3.3]

Especially the Brazilians going abroad to study are looking at large economic burdens, often comprising not only tuition fees, but also a considerable increase in living expenses as studying abroad means moving out from the parents. It is hence not uncommon for Brazilians to apply for their favorite universities and scholarships at the same time. Should they be accepted at a university

but not for a scholarship, many students would wait another year to try again – or focus on other alternatives.

A final set of attributes regarded important by the interviewees relates to extracurricular activities and the university's connection to the "real world":

> *I think a normal thing that makes a great university is that it gives the opportunity for the students to do a lot of projects.* [Nathalia, B, appx. 3.7]

> *To be connected to the real world, and that means being connected with NGOs, enterprises, projects (...) I don't think a university is like an end in itself, it is not supposed to produce knowledge for itself. I think it's supposed to produce knowledge for society.* [Roberta, M, appx. 3.12]

In terms of social life, interestingly this was mentioned only by one of the students un-probed (Rafael), and one explanation may be offered in the following quote:

> *About the social life that was one of the things that I found quite interesting in Denmark, that you really do that. I don't know if that's because here in Brazil we are more open, friendly – we don't really have that... (...) I think it's different for each people because I really didn't miss while I was here, but on the other hand it was nice having it there in Denmark.* [Nathalia, B, appx. 3.7]

It is clear that the Brazilian student life is very different from the Danish – both taking into consideration the very different cultures, with the Brazilian culture seen as more outgoing (requiring less of an active focus by the Brazilian university) but also with regards to the fact that the average Brazilian student spends much more time at work than what is usual in Denmark – leaving less time to university related activities.

THEME III: Decision Making Process for Higher Education

In the former two sections, the Brazilians' motivations and specific needs and wants for higher education have been presented, but how do they decide where to study, and how much contact with universities do they expect throughout the process?

A first important influencing factor on the Brazilians' choice of study destination appears to be *past* experience with the country – and the educational system in the country:

> *And Finland is actually a possibility for me because I already lived there, and I know people there, I know how things work and... it's mostly because of that. And because the university is free.* [Emmanuel, B, appx. 3.3]

> *I never really considered going abroad as I told you, studying like a master's, which would be 2 years abroad – before I was in Denmark. But there was this program, which was really really what I wanted to do.* [Nathalia, B, appx. 3.7]

As particularly the last quote shows, an exchange semester can have a profound impact on the likelihood of a Brazilian's consideration of studying also a full degree abroad.

Aside from this, various sources of information aid the Brazilians' decision of where to study, the Internet and hereunder university rankings were most frequently cited by the interviewees as the first phase in identifying a prospective university:

> *I try to go directly to the websites. Or I try to look at rankings. Like QS they have this area where you can search for Latin America, or North America or Europe – Western Europe, Asia…* [José Roberto, B, appx. 3.5]

> *I think the first thing I will see will be the list of the best universities in the world. So the ranking…* [Marcelo, B, appx. 3.11]

This outspoken focus on rankings reinforces the finding from the sections above where quality in education was highlighted as a main motivation for choice of study. But at the same time, in José Roberto's statement, there is an indication of the relevance of geographical location, which also has been stressed by many of the students as highly decisive for choice of study abroad.

Also in the initial phase of identifying good universities, teachers were mentioned as credible sources of information, as were the interviewees' own universities' lists of partner universities:

> *My teachers. They seem to know everything about it because they're not so old (…), so they were students not so long ago…* [Ricardo, PhD, appx. 3.14]

> *First, I knew some of the schools, because, well, I knew some people that went there. And my school has this list. And I've checked some rankings, and some schools you just know about.* [Carla, B, appx. 3.2]

A few of the students mention having been going to student fairs as well, but in neither of the cases in these interviews, have the fairs been seen as decisive for their decision:

> *I have been to two of those [fairs, ed.], but I must mention that they haven't had a very profound impact on my application process, especially because they were more geared towards MBA and that sort of course (…) And then… there was another one. Some bigger student fair that I ended up not even going to, but I enrolled and I intended to go, but on that day something happened and I couldn't go.* [Rafael, B, appx. 3.8]

From the quote above, it is clear that drawbacks of student fairs include lack of flexibility and at times also a mismatch between focus of the fairs and the target audience that attends.

Having narrowed down the list of prospective universities, many students pointed to alumni students as the next source of information:

> *So first I looked up on the Internet and then I started to talk to alumni. And how they did the process to get in.* [Barbara, MBA, appx. 3.13]

Alumni students can provide the prospective students with valuable information on how to get accepted to their university of choice, and other students mention the alumni students as ideal sparring partners due to their recent experience with the university.

In addition to teachers and alumni students, basically all of the interviewed Brazilians mention also family and friends as included in the decision making process:

> *I discussed it with my friends to compare and to gather ideas. Or simply to tell them what I am planning to do (...). And at some point I have to speak to my family as well [laughing], because after all if I plan to leave I have to tell them. And well, I guess my mother will not be entirely satisfied, but... [laughs]* [Emmanuel, B, appx. 3.3]

It is important to note here, however, that friends and in particular family were used more for support it seems than as highly relevant influencers for the final decision – as the vast majority of the Brazilian students rely on financial support from the family in the absence of scholarships for studies abroad, the family *was* mentioned as an important support, but less so for the choice of destination and university. Roberta proves a good example of this, as she talked with both friends and family, but on the question as to who *influenced* her decision the most she pointed elsewhere:

> *The alumni definitely. They probably had the biggest impact.* [Roberta, M, appx. 3.12]

In addition hereto, actual school visits were highlighted by two of the students, one of which had made a whole tour out of finding her ideal MBA school:

> *I think the school visits. Not talking to people, but the school visits was the thing that influenced the most my choice.* [Barbara, MBA, appx. 3.13]

Time-wise, the Brazilian students start their considerations on whether to do a master's degree and where to do it already in the beginning of the bachelor's degree or even before this – that is often 5-6 years or more prior to actually beginning. However, the closer to starting a master's the more focused gets the research:

> *I mean to be very very honest, every since my first year [of bachelor, ed.] I started looking. I don't know, getting some brochures and things. I started looking a little bit harder than actually considering this after I got back, so it was... August last year [one year prior to graduation, ed.]* [Carla, B, appx. 3.2]

Regarding contact to the university of choice, some interviewees saw informative and easy-to-grasp communication as essential – both prior to university selection and after having been accepted:

> *The website from the university was really good, it was like the best of all. I have had a lot of friends going on exchange the same time as me, and of all the websites I have seen, Aarhus University's was the best. And also the coordinator, she was really sweet and really helpful.* [Nathalia, B, appx. 3.7]

Finally, more or less all the Brazilian students viewed university contact even after graduation as attractive, especially due to network and professional opportunities, as stressed by e.g. Rafael on the question as to whether he would maintain contact with the university upon graduation:

> *Yeah, I very much hope so, like alumni services and… Because nowadays I give a lot of importance to that. (…) the importance of networking.* [Rafael, B, appx. 3.8]

THEME IV: Motivations for Studying Abroad & Challenges in Brazil

A first interesting observation regarding Brazilians' motivations to study abroad is that they are attributed to both an intrinsic attraction to having international experience but equally so domestic challenges. The first can be classified as a "pull-effect" from the foreign countries and universities:

> *I cant explain, it's something that you just feel will be good for you.* [Nathalia, B, appx. 3.7]

> *Some Brazilians go abroad to study to travel.* [José Roberto, B, appx. 3.5]

Whereas the opposite "push-effect" regards a motivation for Brazilians to study abroad due to challenges and shortcomings in the Brazilian system:

> *In my area at least because the cultural studies area in Brazil is not that developed.* [Emmanuel, B, appx. 3.3]

> *(…) to diversify risk a little bit. I put myself in that category in the sense that Brazil has many good things, and it has many distressing aspects (…) The master abroad can work very finely to find a job elsewhere and earning much more, and get a much better quality of life.* [Rafael, B, appx. 3.8]

That is, to "diversify risk" relates to the broadening one's opportunities abroad, in a reality where Brazilian education on the contrary is perceived to give access merely to the Brazilian market.

The quotes referred to above reflect two sides of the same coin: Brazilians going abroad to study because it will benefit them – regardless of whether it is domestic shortcomings or international curiosity that drive them. Looking at the main reasons emerging in the interviews, especially career opportunities must be stressed – as already indicated by the quotes of Barbara and Rafael. The majority of the students thus way point to better career options, hereunder a few examples:

> *First of all this would give an international touch to their career [the Brazilians going abroad, ed.]. Which is much harder if you have 100 % of your education in Brazil.* [Rafael, B, appx. 3.8]

> *I think the most important reasons are prestige, I would say. Because once you have an international degree it's better… I think it's easier to find a job in Brazil.* [Roberta, M, appx. 3.12]

Hence, international experience is related to *prestige* that pays off in the job hunt. Another of the key reasons found among many of the interviewees – also indicated in the previous quote of Emmanuel – relates to how academic excellence in different fields is associated with certain universities and even entire countries:

> *Well, I think mainly it depends of the subject of the study. So… In this faculty people would go a lot to France, because they study French or because the humanistics area it's all about France, so… There's a lot of people that go there.* [Julia, M, appx. 3.10]

> *To develop my skills in this specific area. And here in Brazil we don't have this kind of master's (…) I was looking some place that was having some reputation in pharmaceuticals.* [Marília, B, appx. 3.6]

Related to this wish of studying in the country where the best research and development in a certain field can be found, some of the students stress also the importance of *broadening* their view on their field of study by studying abroad.

Whereas educational excellence and career opportunities seemingly are important factors for going abroad, they aren't the only ones propelling the Brazilians to study abroad. In addition to learning at university, a majority of the interviewees highlights the opportunity to learn new languages and cultures as part of their motivation:

> *You need to experience the other cultures. You need to know, because you never know where you are going to end up. This world is so globalized (…) And also to be prepared for people who come from abroad…* [Ana Claudia, M, appx. 3.9]

Along those lines, the encounter with foreign cultures and living abroad is positively associated with a personal development, maturing process and a way of learning how to become independent:

> *To experience something very very different from my reality, I think it is the most exciting idea (…) To learn from other cultures, ehm… I think to grow as a person, like to make things by myself. Because here I have my family that makes everything, so it is kind of difficult.* [Erika, B, appx. 3.4]

> *You become more independent. And your personal experience is important, maturing.* [Marília, B, appx. 3.6]

Although the last factors mentioned aren't directly related to career, it seems to still play an indirect role, as the students see relations between the personal development and their chances to land a good job. The same goes for improvement of language skills and the understanding of foreign cultures. Even travelling and fun is associated with career-benefitting attributes:

> *And also to travel around Europe, because it is something that you can… use as reference of something (…) I don't know, maybe use an expression in another language. Or say something about cultural aspects, or food. Like 'oh, I*

had my best ice cream in Italy, that was really good'. I think this is an intangible thing that is really important for me and can help me [e.g. in job interviews, ed.]. [José Roberto, B, appx. 3.5]

THEME V: Perceived Barriers for Studying Abroad

From the section above, it appears that strong incentives exist for Brazilians to study abroad. Despite this fact, it is still a very small percentage of the Brazilian students that end up having international study experiences (ICDK, 2014). By looking at the perceived barriers, it has been possible to get a better understanding of why this is so. The answers from all the interviewees revolve around the same few topics with financial burden topping the list of reasons why Brazilians stay in Brazil for studies:

> *Economics. The living conditions especially in Europe are way more expensive than here in Brazil. I think this is the biggest.* [Emmanuel, B, appx. 3.3]

As is clear from the quote below, Brazilians *are* used to pay for quality in education, but more commonly the lower education as opposed to higher education:

> *For me, my parents would pay the basic education until the end of high school, and then I entered a public university, and then I wouldn't pay. We don't save money for bachelor's, master's and stuff like that. We spend the money for lower education.* [José Roberto, B, appx. 3.5]

An implication of this system is that social class becomes important, as mentioned also by Roberta:

> *Social class matters a lot in Brazil. (...) Most of the people who are studying abroad, doing masters or PhDs or whatever, they are not poor (...) they are at least middle class.* [Roberta, M, appx. 3.12]

In sum, studying abroad is for many Brazilians associated with a *triple financial burden,* with (1) tuition fees that need to be paid (which are often higher than in Brazilian universities) (2) living expenses associated with living alone (as it is common for Brazilian students to live at home while studying), and not least (3) the opportunity costs of working. Many Brazilian students work between 20-30 hours per week (sometimes up to 44 hours), while attending university at night.

Aside from the economic barrier, foreign languages – and to some extent cultures – are mentioned by the interviewees as a reason keeping Brazilians at home:

> *I think language is one (...) That's definitely a point (...) I am thinking now about my friends. I don't know if they really could follow a high-leveled class in English.* [José Roberto, B, appx. 3.5]

Lacking English proficiency is mentioned by many of the interviewees as a decisive barrier for studying abroad. In addition hereto, a few interviewees stress that many Brazilians also simply don't know their opportunities for studies abroad, and that they don't know what benefits it has:

Maybe they don't have this opportunity, or don't know what it can bring for their lives. [Erika, B, appx. 3.4]

Another factor holding Brazilians at home is a comfortable status quo – where leaving the comfort zone, especially a job and family and friends can ultimately be too much to let go of, e.g.:

Being afraid of being far away from their families and friends [Erika, B, appx. 3.4]

And connected to this consideration of leaving the comfort zone, a very interesting aspect is mentioned by three of the interviewees – of which one is already studying a master's degree in France, and whereof the remaining two are about to start full master degrees in Europe:

The fact that it is not exactly temporary… that I might not come back to Brazil directly afterwards [Rafael, B, appx. 3.8]

Being away from your family and friends. Because you're moving to a different country, probably like… like for the rest of your life, you are not going to come back here. I mean you can come back, but not to live here. So that I think is the main challenge to be honest. [Carla, B, appx. 3.2]

That is, for the students that consider doing a full degree (e.g. master's) abroad, the decision concerns not only leaving Brazil for the one or two years that a master can take, but several years to come. Habits are also "blamed" for keeping Brazilians at home, seeing that there is not the same culture for traveling abroad – at least yet – as they perceive there to be in Europe for instance:

I think we are not as familiar as for instance Danish to go abroad, we don't travel as much… [Julia, M, appx. 3.10]

Finally, for the academically oriented Brazilians (considering PhD either abroad or in Brazil), the fear of losing contact to the Brazilian research network is seen as a big minus from going abroad:

I think that if we study too long far away from here, when we come back years later, you will have lost the contact to the teachers and the groups of the research. And this connection is important for when you start to look for a job. [Marcelo, B, appx. 3.11]

This was a common fear stressed by those of the interviewees who were either considering doing a PhD or who had already finished it. To outweigh the negative effect of leaving the domestic research network, the foreign university would have to be top ranked, the interviewees mention, as it only in this case could ensure equal job opportunities in Brazil upon finishing.

THEME VI (a): Image of Denmark – in the eyes of Brazilians with <u>no</u> study experience in DK

For both this theme and the subsequent one, responses have differed due to the fact that six of the interviewed Brazilians have studied one or more semesters in Denmark, while the remaining seven have not had any study experience in Denmark. It is interesting to look at the disparity between images held by the two groups, and looking first at the group of students with no study experience from Denmark, it is clear that little is known about the country. When asked to point out Denmark on a map of Europe, a couple points at both the Netherlands and Sweden, giving a first indication of the lacking clarity of a Danish image.

Right after this exercise, the interviewees were asked to their immediate associations to Denmark:

> *Cold. Hard language. I don't know… Nordic. I think "well-off people". I would say cold people. Yeah, I think that's it. (…) I think it is one of the countries that I know the least.* [Barbara, MBA, appx. 3.13]

While *the weather* emerged as an immediate association for all (with the adjectives used being *cold, cloudy and bad*), the only other commonly shared statement by this group of interviewees was a general lack of knowledge of Denmark, as also demonstrated in the quote above.

Despite a general acknowledgement of not knowing much about Denmark, all the interviewees managed to put a few words on Denmark: *hard language, well-off people, cold people, beer, Lars von Trier, fjords, Milka chocolate, girls wearing a traditional dress and wooden shoes, Vikings, bikes, tall blond people, highly educated people, developed country* and *expensive.*

In the same way that some of the respondents had trouble pointing out Denmark on a Europe map, a few of the associations from the above similarly reveal an unclear image of what is Denmark – here thinking particularly on *Milka chocolate,* which is Swiss, and the traditional clothing described, which is Dutch. Consistent with the trouble in describing Denmark, more of the students explicitly state that it is difficult for them to find isolated associations *just* about Denmark:

> *It's blurry for me, I think of Nordic. I don't think of Denmark itself.* [Barbara, MBA, appx. 3.13]

> *I have this image of Denmark related to the same image I have of all the Scandinavian countries (…) To me they ring the same bell (…) Yes, my knowledge about Denmark is limited actually.* [Ricardo, PhD, appx. 3.14]

In the next part, these students were asked to how they would *imagine* studying in Denmark. The hardest part, they imagined being the social part of living in Denmark, interacting with the "cold people" and aside from this, learning the language. Interestingly, more of the students mentioned the "need to learn Danish" although well aware that they would be able to get by with English:

When I am in another country, I feel like I have to speak their language and try to be respectful. [Emmanuel, B, appx. 3.3]

I know that everybody speaks English, but I don't think that I would feel comfortable being a foreigner forever. At least when you're in the US or in the UK you can pass by… but in Denmark… you will just not unless you learn Danish of course. [Carla, B, appx. 3.2]

Imagining what the best part of studying in Denmark is, the interviewees have different ideas coming to their minds, ranging from *experiencing a different culture, the access to other European countries, quality of infrastructure, the opportunity to communicate in English,* to *gender equality* and *quality of life* (see interview transcripts with Barbara, Carla, Emmanuel, Marcelo, Rafael, Ricardo and Roberta). It is noteworthy that neither of these responses is related to the actual studies but rather to *country* characteristics.

To get a *broader* view of Brazilians' image of Denmark, the students were asked to imagine how their family and friends would react to the thought of them studying in Denmark:

Oh, my best friends would say I am crazy! My family would be more open to it than my friends. It's really like, my friends would say "what the hell are you going to do there?" Like… They wouldn't approve [laughs]. (…) Denmark for them would be like sort of the question that you asked "what comes to mind?", it would be like, I don't have many words to define, so why would you go there? [Barbara, MBA, appx. 3.13]

The quote above depicts very well the general answers given to these questions. Families were generally seen as more supportive, not least as Denmark would be perceived as a secure country to go to, but due to the lack of associations, a general *puzzledness* from both friends and family was imagined by the interviewees. Interestingly, the Netherlands was mentioned as a country that would generate less of a puzzledness in the minds of parents and friends – because of greater familiarity herewith, even if only from tourism. Further stressing the limited knowledge of Denmark in Brazil, this group of interviewees could hardly mention neither Danish universities nor companies.

THEME VI (b): Image of Denmark – In the eyes of Brazilians <u>with</u> study experience in DK

Looking to the interviews of the six Brazilians *with* study experience in Denmark, a set of differences is important to highlight. Not so much in the reactions from friends and family, as these reference groups' reactions generally were the same as for the Brazilians' merely *imagining* breaking the news of going to study in Denmark. Also, it is not interesting to highlight that this group of students had a more profound knowledge of Denmark, as the reason for this is obvious. What is important, instead, is to forward (1) why Denmark became a priority when widely unknown

as seen above, (2) their immediate associations and thoughts on Denmark – as these give us an idea of what characteristics of Denmark make a real impression on Brazilians – and (3) if anything surprised them compared to their initial image of Denmark. Boiling down the list of reasons listed for choosing (usually just one semester in) Denmark, the interviewees stressed e.g. wanting to experience something *different* and to experience a more *inclusive* educational system:

> *I wanted a place where culture and everything was very different. So my experience could be better.* [Erika, B, appx. 3.4]

> *I saw there is another system, where you could participate and be interacting with the professor, giving your opinions and where they respect that. I think it would be really interesting to experience that, so that's why my Top 2 were Scandinavian countries* [José Roberto, B, appx. 3.5]

And as the quote below shows, Denmark also at times wins exchange students due to it being a Scandinavian/Nordic country:

> *I wanted to go to Scandinavia because my sister went to Finland, she is my hero, so I wanted to copy her.* [Julia, M, appx. 3.10]

While the quotes above present actual motivations to go to Denmark (though not all equally focused), Denmark also receives some Brazilian students because it has less language barriers than some other countries do – i.e. Denmark being the "best readily available option":

> *I was looking for some of them [universities, ed.] in Europe. In Germany some of them asked for like "basic level of German". I have already studied German but it's not good, so no [laughs]. And so it was like a lot of things, and I didn't have time to apply for the TOEFL or IELTS.* [Marília, B, appx. 3.6]

But what then become the immediate associations to Denmark *after* having studied there?

> *Bikes. Snow. Very good moments I had there. Social life. Quality of life. Work to do and studies.* [Erika, B, appx. 3.4]

> *How good the university was. (…) And especially what I remember, it was the quality of life, definitely. It's how people really live there, and here we kind of survive.* [Ana Claudia, M, appx. 3.9]

> *Work-life balance. Yes. (…) You can work or study, but you need to have your relaxed time. But here [Brazil, ed.] we need to, like… because we spend three hours in the traffic, I don't know…* [José Roberto, B, appx. 3.5]

> *Well [laughs]… First the people, I really love the people there! I think I went there with a bad impression of that thing, like I was thinking everyone would be so cold and instead I was so welcomed, so well treated and this really impressed me.* [Nathalia, B, appx. 3.7]

From the quotes above, it is evident that especially quality of life, the city infrastructure and the social life and people have made an impression on the Brazilian students.

To the question of what was the best about studying in Denmark, the Brazilians replied:

> *One great thing… well it's a bit stupid, but it was really good that university worked also at night. (…) And a nice thing is that the students have scholarships there, so they are all the time worried about the study. Here we study like half period, work another one, and try to sleep in the last one.* [Julia, M, appx. 3.10]

> *I would say infrastructure I think, and ehm… this was very good. I could learn a lot. The university had a good library, so I could make good research there, the professors also had a… Some of them had a very good international experience.* [Ana Claudia, M, appx. 3.9]

> *I think it was important for me to see a different aspect of my profession.* [Marília, B, appx. 3.6]

In contrast to the Brazilians *imagining* the best part about studying in Denmark, the statements above relate mainly to *study related* factors of their time in Denmark rather than country specific characteristics. This difference adds to the suspicion that very little is known about the Danish educational system for Brazilians that have not been to Denmark.

On another note, the worst part about studying in Denmark was described as below:

> *I think it's Danish [laughs]. Because everybody speaks English, but to really get in touch, you need to speak Danish. And I don't know if it's feeling comfortable, but I think it's not right maybe just like "hey guys, please change to English". It was clear for me that that was a barrier.* [José Roberto, B, appx. 3.5]

> *In the first class I was very lost, and I didn't know that I had to read something and go prepared… and this was very difficult to understand how things work there (…) And studying in another language.* [Erika, B, appx. 3.4]

> *The hardest part? (…) Well, I think for me it was just in the beginning... It was the idea of living alone…* [Ana Claudia, M, appx. 3.9]

The three quotes above summarize well the main points mentioned, and not surprisingly they all relate to the difficulties of adapting to a reality that differs from their own. In particular, language, study routines and independency were highlighted in the six interviews.

Regarding the question on the best thing about *living* in Denmark (i.e. not university related), several of the Brazilians pointed to an easy and not least secure life as a major plus:

> *I think the best thing is to go around on your bike, and don't think, I don't have to be afraid because nobody is going to rob me or hit me or shoot me or anything* [Julia, M, appx. 3.10]

A final point relevant to include regards the extent to which the Brazilians were surprised when arriving in Denmark – i.e. whether their research and initial image equaled the reality:

Yeah… I think I had expected the people to be more closed. But no, like… They were very open-minded and friendly. [Marília, B, appx. 3.6]

Yes. The first thing was the cold weather. Like, I thought it was cold, but I had never experienced something like that, so it was a little bit hard for me. [Erika, B, appx. 3.4]

You will laugh at my answer, but it was cold! I read that it was cold, but I didn't know that it was so cold! [Ana Claudia, M, appx. 3.9]

One thing for example. I had two courses there, and one was far beyond what I imagined of this participatory system, because it was really really participatory class. [José Roberto, B, appx. 3.5]

Hmm… I thought it was way more multicultural than I thought it would be. [Nathalia, B, appx. 3.7]

Summing up, the reality that met the Brazilian students was not exactly like their pre-established image, and especially the friendliness of the Danes they met surprised them alongside *how cold* the Danish winter in fact is compared to what they imagine.

THEME VII (a): Image of Danish Higher Education (Brazilians with no study exp. in DK)

As seen for the previous theme, the responses regarding the image of Danish higher education differ between a group of Brazilians that have studied in Denmark and a group that has not.

There may be various reasons as to why Brazilian students do not choose to study in Denmark, one of them lacking information:

I don't even know there are programs. Again, lack of information. The US universities are in the MBA rankings that you see, so… (…) I never saw like a Denmark school there. [Barbara, MBA, appx. 3.13]

Aside from the lacking knowledge of specific programs, the Brazilians with no experience from Denmark generally forward a positive perception of the quality in Danish higher education.

I think… I will be having a good education for sure. I will never question that (…) I think everything that is Danish – people rely on Danish things. I think in Europe if you compare a Danish – in my opinion – Danish student or a Danish product or a Danish professional I think it is perceived better than a Spanish one or Italian or even a French one. [Roberta, M, appx. 3.12]

More specifically, *Barbara* describes her perception of the quality in Danish education to be solid and on line with other European offers. In a similar vein, *Emmanuel* who is considering Germany and Finland for a master's, states that he would perceive the quality of education in Denmark to be at the same level. And also Roberta, who is currently doing a dual degree in France and England,

states that also she would compare the quality of Danish education with that of both Germany, England and Netherlands (countries she considered) – and in fact better than the French.

However, Roberta did not choose Denmark in the end, and to the question of what disadvantages she sees from studying at a Danish university she says:

> *Once I have this degree, and lived there, I will feel a little bit limited to the Scandinavian world, and less integrated in the European and outside world. That's a disadvantage I think.* [Roberta, M, appx. 3.12]

Another of the students, Rafael adds that he perceives the offering to be very international and value for money (especially for European citizens). As to the disadvantages for choosing to study at a Danish university he says:

> *Probably some cultural differences, then (…) I have a little bit the anxiety of how welcome… how will I be seen… Will I be seen as a third world country person making use of the social welfare system in Denmark or I will be seen as someone genuinely interested and who has a right to be there?* [Rafael, B, appx. 3.8]

In sum, the quality is perceived to be good by the Brazilian students, however, they also see disadvantages for studying there. And that quality in education is not the only important factor for choosing higher education is underlined by Barbara, who states that the longer down the ranking list a university is placed, the more important becomes the country in her view – that is, if impossible to get into the best schools, country characteristics suddenly increase in salience:

> *So I was like, I can do cheaper – like Bocconi is much cheaper than MIT. I can do cheaper and I can live in the country that I'd like [Italy, ed.].* [Barbara, MBA, appx. 3.13]

And a final observation, from the interviews with Brazilians that have not been studying in Denmark, relates to their perception of *how* the education operationally is run:

> *I would perceive like a professor in front, and I am like writing my notes and just listening to it. And going home without discussing much…* [Barbara, MBA, appx. 3.13]

However, it must be mentioned that some of the other students hold a contrasting perception (see for instance interview transcript with Emmanuel).

THEME VII (b): Image of Danish Higher Education (Brazilians <u>with</u> study exp. in DK)

Now looking to the perceptions of Danish higher education from the Brazilians who studied in Denmark for at least one semester. Again, obviously, their answers are founded on an informed background, but as in the previous theme, their answers provide important information as to *which*

characteristics in the Danish educational system make an impression on Brazilians. Going from the Brazilian educational system to the Danish inevitably entails some differences, central ones being:

> *I think in Denmark it is more a student life. (...) You live the university… you study and you stay there (...) you have a life around university. It is a thing that you can do in Denmark, but you can't do it in Brazil.* [Julia, M, appx. 3.10]

> *The structure of the course... So in Brazil we have a longer bachelor, but it is not necessary. What I felt there, it was almost an obligation to do a master's in Europe, but here in Brazil it is not like this.* [Marília, B, appx. 3.6]

> *Okay, academically speaking definitely the infrastructure [access to data, ed.]. I mean I miss it a lot. (...) It was easier to do research of everything and of other books.* [Ana Claudia, M, appx. 3.9]

> *(...) I kind of got the feeling that the Brazilian students were much more engaged than in Denmark (...) Because people [Danes, ed.] spent the entire time on Facebook with their Macs open… and maybe it's because not everyone has Macs here, but we do listen to the class.* [Nathalia, B, appx. 3.7]

That is, comparing to the Brazilian educational system, differences are found in student life, student engagement, access to data and in the actual structure of degrees.

When asked whether they had seen any advantages from having studied in Denmark, the general consensus was yes, especially relating to personal growth, improved international career opportunities (as well as a broadening of own perspectives) and language proficiency, the quote below providing one example:

> *Yeah, I am a different person for sure. I was very shy… and kind of used to my life. (...) It was good; it was a chock like living in a completely different country. (...) I think I grew up as a person and… It made me think more about my choices, in my career. I am working in a different area than I used to work now.* [Marília, B, appx. 3.6]

On the contrary, no real profound disadvantages of studying in Denmark were forwarded by the interviewees – except for being encountered with stereotypes about Brazil, and that the well-functioning society also at times could be a bit boring (cf. interviews with Marilia and Julia).

9. Data Analysis

In the following, the data presented throughout the previous section will be analyzed in relation to the theoretical framework. The data gathered contribute primarily to a discussion of the first two pillars of the theoretical framework, namely *place branding theory* and *higher education branding theory*, whereas the final pillar *general brand management theory* offers more of a practical instrument to be used in the final recommendations in section 10.

It must be noted that the two former sets of theories are interrelated, when it comes to the internationalization of higher education, as why a clear division is not always possible in the below.

9.1 Place Branding Theory

9.1.1 A New View of the Nation Brand Architecture

In the theory section of nation branding, the main focus was placed on the *sub-brand to Denmark*: the sector of Danish higher education. Dooley and Bowie (2005) proposed that the four generic brand architecture strategies (developed by Aaker and Joachimsthaler, 2000) could be applied to place brands as well. In the dataset, however, it became clear that the overlying layers, especially Denmark as a brand but also Scandinavia and the Nordics as brands, are of immense importance to the branding of Danish universities internationally. This may not be surprising as students choosing to study abroad will likely be spending more time outside university – and hence in the country of choice – than inside university walls.

Figure 9.1 (7.3 revised):

Brand Architecture for *Nation Brands*

Source: Adaption of Dooley and Bowie (2005)

Surprising or not, this finding suggests an interesting implication for the brand architecture strategies suitable for *nations and their sub-bands*. Because whereas brand managers in control of corporate brand architectures indeed have four strategies to choose from – ranging from creating strong ties between sub-brands and mother-brand to completely ignoring the ties between them, brand managers for nation brands are often limited to just three strategies it seems. Then, the majority of sector umbrella brands are "locked-in" with the country, requiring the consumers to be *in the country* (or in a region/city) to consume the particular product (as sought illustrated in figure 9.1). This is the case for Top Talent
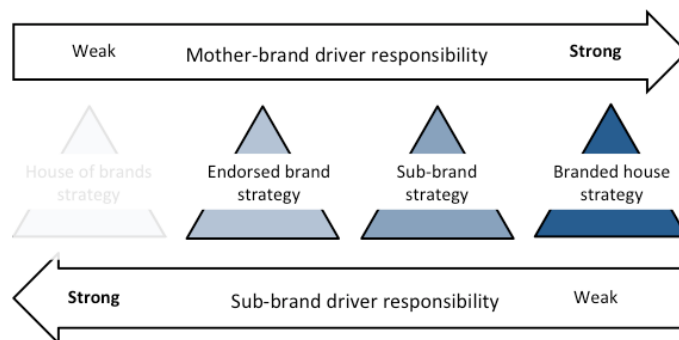
Denmark, as Brazilians wanting to enroll in a Danish university must go to Denmark (at least for now, disregarding the emergence of online programs).

This means that it would be foolish to ignore the tie between nation and sub-brand, as is often the case in the house of brands strategy. In other words, for some nation sub-brands, the consumer is required to consume from *more* layers in the brand architecture (for instance a master's degree at AU would entail the "consumption" of the mother-brand, Denmark), limiting the number of viable brand architecture strategies. This is not usually the case for corporate brands. A consumer of Gillette razor blades is not necessarily required to consume other P&G sub-brands and an explicit linkage between

Figure 9.2 (7.4 revised):
Brand Architecture Strategies for *Nation Sub-Brands Consumed On-Site*

Source: Adaption of Dooley and Bowie (2005)

Gillette and P&G is hence not critical. Therefore, Gillette can easily disregard the mother-brand in its marketing efforts. Nation sub-brands on the other hand (such as Danish higher education, which is consumed *in the country*) cannot afford to ignore the mother-brand. Integrated consumption is inherent, and platforms such as Top Talent Denmark are obliged to look beyond the branding of the sub-brand itself (higher education) and instead *split efforts* to include actual nation branding too – that is, for successful internationalization of higher education, brand managers must understand that students are choosing not only the university's offerings but *also* the country's other offerings.

9.1.2 Implications for the Two Foci in Nation Branding

The finding above – that Brazilians who choose to study at a Danish university are also automatically consuming the overlaying "brand layer" (i.e. Denmark) – has a further implication for the amount of foci relevant in a successful branding of the nation sub-brand. In the theory section, it was stated that successful branding would require branding efforts towards the Brazilian target group, and equally so the controllers of the product (i.e. the Danish universities and their employees). But acknowledging the fact that international students consume also the country in which they study, an additional focus appears: the Danish population. It was mentioned by several of the Brazilian students that they were "fearing" the encounter with what they perceived to be the

"cold Danes". That they would not feel welcome. In order to ensure a good study experience in Denmark, *both* universities *and* the country (Denmark) must be delivering an appealing product.

9.1.3 Managing Brand Identity and Image in Nation Branding on Two Levels

Another implication of the notion that international students consume not just education services but a country too, when choosing to study abroad, is that the balancing act of avoiding gaps between identity and image must also happen at two levels: sub-brand level (i.e. creating harmony between identity and image of Danish higher education) and mother-brand level (i.e. creating harmony between identity and image of Denmark). The nature of international higher education thus suggests that a national entity created to promote this sector cannot solely focus on sector promotion, but needs at the same time to promote the nation. As part of this exercise the two brand identities and images should be monitored, and where gaps, measures should be taken.

With outset in the theory on brand identity and the interviews conducted with four out of seven of the Danish universities participating in TTDK as well as the interview with the co-creator of the Top Talent Denmark platform, it has been possible to draft a common brand identity for Danish higher education as seen in figure 9.3. The brand identity consists of the eight elements stressed by Dinnie (2008), and can be useful in guiding the activities of ICDK. By nature, it is more challenging to draft a brand identity representing the views of an array of institutions than one.

Unfortunately, it was not possible to coordinate a collective meeting with the universities and a TTDK representative, although this would be necessary of course for the creation of a brand identity agreed upon by all partner universities.

Before scrutinizing the match between brand identities and brand images, a quick look to the overall theory of influencers on nation brand image. The data demonstrated that, in the absence of a strong nation brand, not only supranational brands (such as Scandinavia or the Nordics)

Figure 9.3 Brand Identity for Danish Higher Education (Top Talent Denmark)

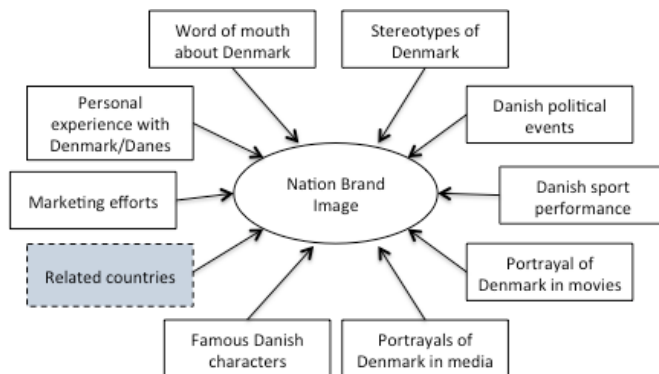| Brand Identity for Danish Higher Education		
Brand Vision	To provide Chinese and Brazilian students with world-leading education and career opportunities (Top Talent Denmark)
Brand Scope	Chinese and Brazilian markets (Indian to come)
Brand Name	Top Talent Denmark
Codes of Expression	Logo (Danish Coat of Arms), Danish flag, red color
Everyday Behavior	Student organizations, short distance between student and professor, collaboration with businesses, academic teaching and publishing, promoting critical thinking, lectures, etc.
Points of Difference	Uniqueness of the Danish education culture Think | Play | Participate
Narrative identity	Narrating the Danish higher education story
Brand Ideology	Critical individual thinking, playful learning, participation, equality, etc.

Source: Author's own illustration

but also geographically proximate countries in general may influence the target group's perception of a country. This was shown, as the general lack of knowledge of Denmark led respondents to associate Denmark with characteristics borrowed from countries close to Denmark (Nordic countries, Germany and the Netherlands in particular).

This suggests an addition to Dinnie's (2008) compilation of factors influencing a nation brand image as illustrated back in figure 7.5. While geographically proximate or elsewise related countries may charge Denmark with so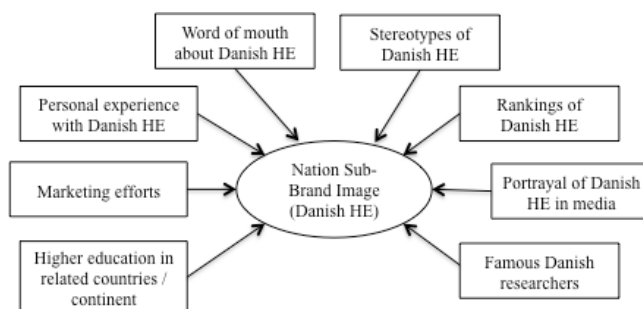me positive associations in the minds of Brazilians, it is dangerous to leave the image to competition – as stated already in the theory section. At the same time, it was shown in the results that belonging to a supranational brand can have positive effects on the image of Denmark, implying that Denmark can benefit from also strengthening the associations of being a Nordic and Scandinavian country. Less so, did the interviewees seem to borrow associations from their image of Denmark in their description of Danish higher education. This indicates that country characteristics more easily transfer from country to country than from country to a specific sector, such as education. Instead, the interviewees with no firsthand knowledge of the Danish educational system borrowed associations from their image of educational systems in geographically proximate countries – or where no specific image was held of education in a country close to Denmark, associations were transferred from the perception of education in Europe at large. In sum, this indicates that weak brand images in general may result in association lending from other brand images – *at the same level in the brand architecture*. With outset in the data, a similar figure to 9.4 can be constructed for which factors influence the brand image of a nations' higher education, as shown in figure 9.5.

Figure 9.4 (7.5 revised):

Influencing Factors on Nation Brand Image

Source: Adapted from Dinnie (2008)

Figure 9.5 Influencing Factors on Nation Sub-Brand Image

Source: Author's own illustration

With regards to the Brazilians' perception of

Danish higher education as such, a generally positive image was held of the imagined quality of education, but when probed to more specific characteristics of the educational system in Denmark, a gap appeared between the desired brand identity and the brand image (which in many cases was indeed "borrowed" from images held of neighboring countries as discussed above). The particular characteristic of participative learning proves a good example of how specific properties of the Danish brand identity for higher education has not transferred to the Brazilian student prospects. Some of the interviewees did have this idea, but others imagined a completely different reality, where Danish lectures were imagined being one-way communication with students taking notes, and with little room for discussion.

A gap between image and identity existed not only for the students with no experience with Danish higher education, but also for some that had been studying one semester at a Danish university; the professors were (not all though) often seen as promoting the participatory classes, but the Danish students on the other hand ruined to some extent this image, as these were seen as mentally absent, checking Facebook during lectures. This gap will be discussed more in detail in the subsequent section as it relates to one of the peculiarities in higher education and hence adds to this theory. Practical implications of the weak image of Denmark can be found in section 10.

In sum, the data analysis above has given rise to the following *suggestions* for the development of nation branding theory:

- a revision of the brand architecture for nation brands and more specifically, which brand architecture strategies are in fact suitable for nation sub-brands, in particular sector umbrella brands. The unique nature of the nation brand architecture entails a need for integration of sector and nation branding, whenever a sector is "locked in" the country.

- given the finding above, a multi-focus approach is required for the successful branding of "locked in" sectors. Foreign target group (e.g. Brazilian students), sector target group (e.g. employees in Danish universities) *together* with a broader national target group (e.g. Danish population) must be kept in mind for a long-term successful attraction of foreigners

- the "locked in" sectors similarly demand a dual focus on brand identity and image, underlining the need for integrated branding efforts when separate entities control the nation brand and sector umbrella brands respectively.

- that the brand image of a nation is influenced not only by supranational brands, but by geographically proximate countries in general (regardless of actual relations or the existence of shared borders)

9.2 Higher Education Branding Theory

This section aims to review the transcripts from the Brazilian students to (1) specify *what* the Brazilian students value with regards to higher education and (2) – at a broader level – to suggest developments in the theory on internationalization of higher education.

9.2.1 Decision Making in Higher Education

From section 7.2.1, the important question of *who* to consider the customers of higher education was raised. Although this can be viewed from many perspectives, the majority of studies on higher education took outset in seeing the student as the customer and consumer. For Danish students taking a full degree abroad, it may very well be themselves that are viewed as both consumers and customers, as they at least to some extent will be able to finance their stay from private funds (although student loans, grants and scholarships will often be part of the financing). Looking through the interview transcripts, a different reality for Brazilians appears. For Brazilian students going abroad to study – even for just an exchange semester – a reliance on the parents is very evident, and in many cases it will be correct to view the parents as the true customers, while the students merely consume the services. This distinction between customer and consumer is important to note, as it may affect the decision making process, seeing that more decision influencers (/target audiences) enter the picture. The apparent difference here between Denmark and Brazil suggests that decision making in higher education (abroad) may vary from country to country, consequently affecting the way that higher education should marketed.

However, even if the majority of the interviews revealed that parents were often the customers, interestingly, the parents seemed not to be highly influential on the students' decision making as to

Figure 9.6 Decision Making for Studies Abroad

Source: Authors own illustration

where to study abroad. The parents *were* indeed included in the decision making process – as were friends, professors and alumni students from the prospective universities – but seemingly more so in terms of *whether or* not to study abroad (i.e. financial support or not), and not so much about the specific destination in the end.
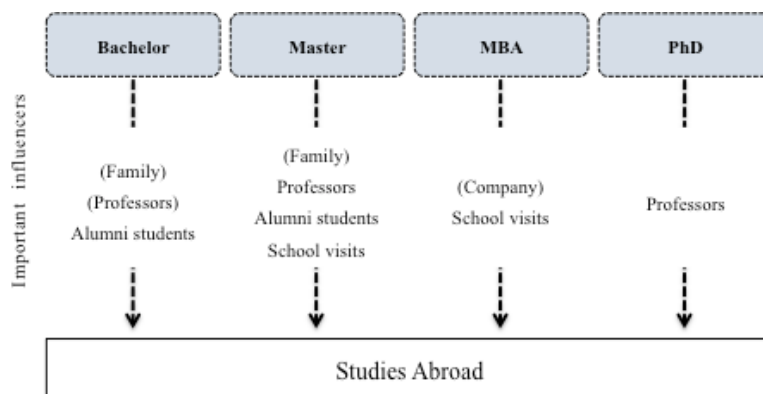
As illustrated in figure 9.6, the interviews suggested a difference with regards to *who* were considered the most influential for the decision making process for the different levels of education. It is important to note that the figure does not include all influencers that have been mentioned by the interviewees, but the ones that they have stressed as important for their decision. Regardless of academic level, it was clear that the interviewees saw *themselves* as the most important influencers of the final decision, supporting marketing Top Talent Denmark mainly towards them.

The interviews showed that especially alumni students and professors were used in the process of discussing university options abroad. Not surprisingly, the more academic the orientation of the student, the more important the consultation with professors, implying that for the attraction of PhD students, efforts targeted towards relevant faculties in Brazil are important. For the one MBA alumni interviewed, companies were mentioned as an important influencer – both with regards to funding and in some cases in the sense that only top universities would be considered valid for the companies to hire from.

9.2.2 Co-creative Element in Higher Education and its Effect on Brand Image (Hatch & Schultz)

As discussed in the theory section, one of the idiosyncrasies in higher education (*co-creation*) regards the abnormal extent to which the "consumers" (i.e. students) are actively part of *creating* the product they are consuming. A further implication of this idiosyncrasy emerged in the dataset, as this characteristic implies that the *culture* of the universities do not only depend on the employees, but also to a high extent the students in general. One of the interviewees had been surprised by the fact that many Danish students were not participating in the class (using Facebook instead), although professors in many instances had been described as promoting such behavior. This suggests that the professors are not alone with regards to maintaining a culture in alignment with the identity the universities try to construct and hereby the image they hope to establish. Instead, the consumers (students) too affect the "participatory culture", and hence both professors *and* students should be steered towards such behavior.

9.2.3 Motivations in Higher Education

Figure 7.7 compiled a list of attributes of higher education seen from an international perspective, but as evident from the dataset, mere attributes do not equal the underlying needs nor do they comprise the only important variable to keep in sight, when targeting higher education to an international audience. Figure 9.7 provides an overview of the overall variables that emerged as

Figure 9.7 Internationalizing Higher Education
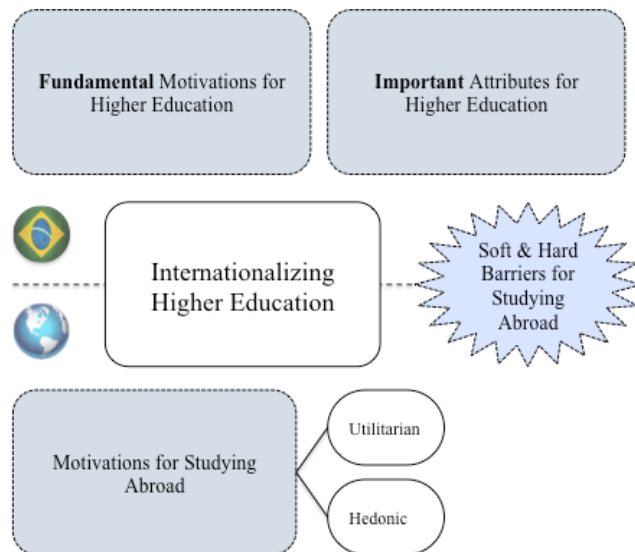
Source: Authors own illustration

important in the data. The top of the figure illustrates the general considerations in Brazilians' choice of higher education, whereas the dotted line in the middle symbolizes the border where additional considerations enter the picture regarding studies abroad. All of the elements are elaborated on in the following.

It is a widely accepted notion in marketing that consumers do not demand products and services for their combination of specific attributes in themselves – but for what their combinations can do in terms of satisfying needs and fulfill wants. A notion confirmed by all the Brazilians on the open question *why higher education.* Responding to this question, none of the interviewees pointed to the specific university attributes listed in figure 7.7 – not class size nor reputation, student life or multiculturalism. Instead, the interviewees' fundamental motivations for higher education demonstrated five different drivers: to propel career opportunities, stay close to where knowledge flows, to stay connected to research, to reflect on life or to comply with family patterns.

With this knowledge as foundation, it will be easier to *understand* why certain attributes are important to Brazilian students. Here interviews confirmed to a large extent the compilation of attributes provided in figure 7.7 in the theory section, however, with few alterations as seen below.

Figure 9.8 (7.7 revised) University Attributes (Brazilian Perspective)
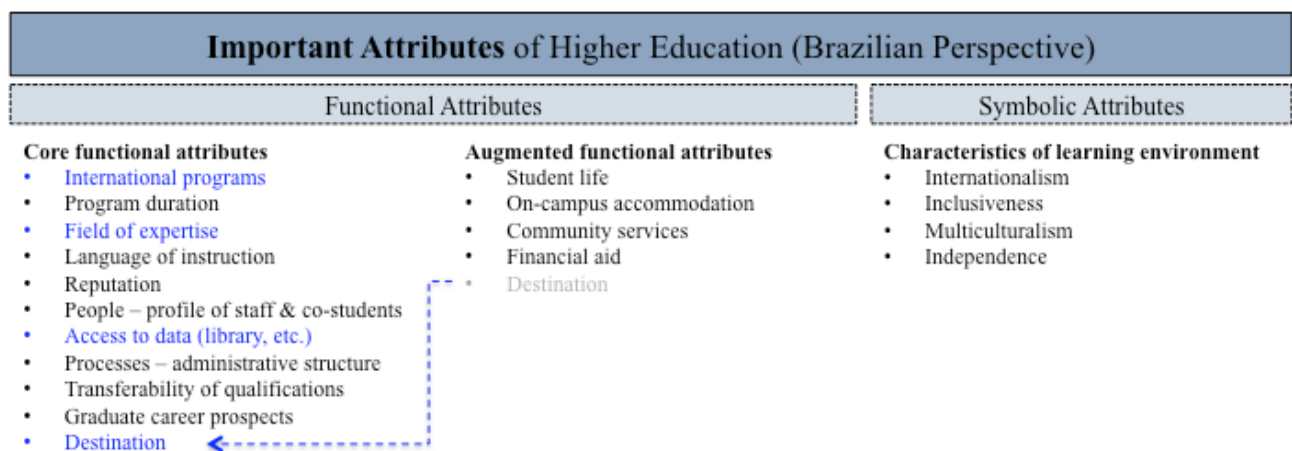
Sources: In-depth interviews with Brazilian students

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As illustrated in the revised figure, the attributes of class size, mode of assessment, lecture material and campus appearance were not mentioned in the interviews, the same way that also sport facilities and student life were not top of mind for the interviewees when asked to what a great university is. Program content *was* addressed by the interviewees, but more importantly, they looked for fields of expertise as marked in blue. Also, an interesting addition to the compilation of important attributes is that of libraries – i.e. access to knowledge. Many of the students highlighted this attribute and some of the interviewees even as a key attribute of a great university. A final alteration to the figure is the relocation of "destination" from its classification as an *augmented* functional attribute in the theory section to – considering the Brazilian view – being classified here as a core functional attribute when considering studies abroad.

An interesting observation regarding the fundamental motivations outlined above and the related demand for university attributes emerges when comparing to the motivations that the interviewees expressed for *studies abroad*. In the theory section, motivations were classified as (1) academic, (2) career-oriented or (3) experiential (cf. Wang, 2004). The first two can compare primarily to what is also called *utilitarian* motivations, whereas the third compares to the *hedonic* motivation. Interestingly, the Brazilians' motivations for higher education in general all tended to be of *more* of a utilitarian character than hedonic – though some having hedonic elements too (cf. left side of 9.9). When asked to their motivations for studying abroad, some of the same motivations were forwarded, but also a plethora of other motivations (cf. right side of figure 9.9).

As presented in the section on "results", these motivations were all in fact connected to academic and career-benefiting properties, or said in another way, all serving utilitarian purposes to some

Figure 9.9 Motivations for Higher Education (general) vs. Motivations for Studies Abroad
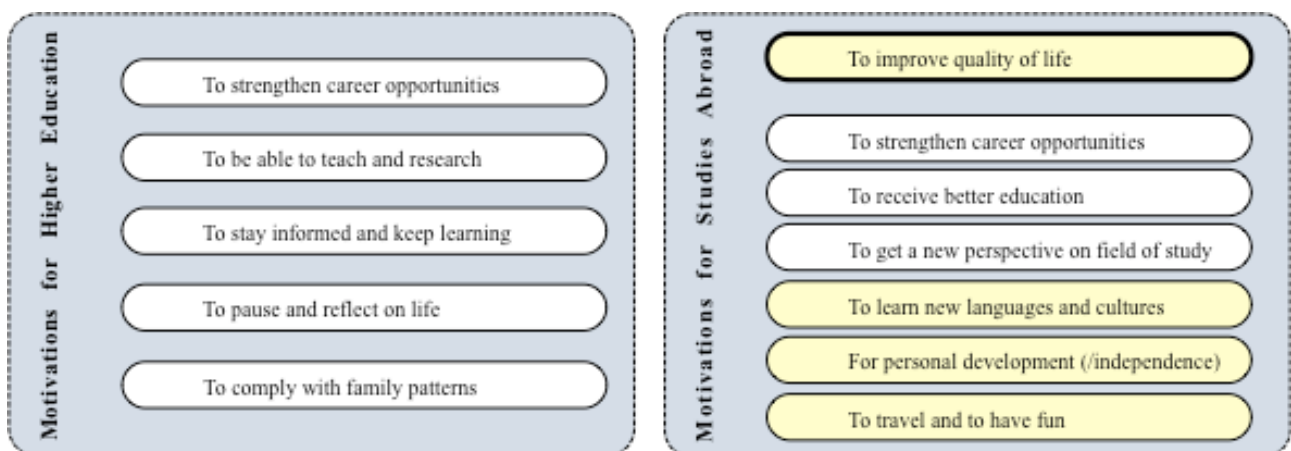
Source: Authors own illustration

extent. However, that being said, it is also clear that not all of the seven overall motivations for studying abroad are purely utilitarian. The top one together with the three bottom ones also have hedonic elements. This suggests a *distinction* between branding higher education domestically and internationally – at least for the Brazilian target audience. There is no doubt that utilitarian motivations are very salient in the Brazilians' choice of higher education – be it in Brazil or abroad. But for the students considering doing a part of their education abroad, an extra dimension seems to enter the picture. Rather than choosing merely what the university must be able to do for them, they come to decide too what their destination shall provide them with. From the 13 interviewees, four students were in the middle of (or had just recently finished) the decision making process of choosing a full degree abroad. Looking at their transcripts, it clearly shows that the choice of higher education abroad is not only decided by university performance, but by a duality between institution and country – entailing a willingness from the students to compromise with their overall motivations for higher education ,and subsequent demands with regards to university attributes, in order to accommodate their *destination* preferences – which for some of the students were at least as important as the university. This observation of hedonic motivations at times dominating utilitarian motivations is not uncommon (Dhar & Wertenbroch, 2004), but it is nonetheless important to keep in mind – and according to the dataset also in the field of branding higher education.

Specifically, *to improve quality of life* appeared to be the underlying motivation for studies abroad, and many of the other motivations listed by the interviewees were "intermediary motivations" to this. Quality of life may very well implicitly be the main motivation for higher education in general, but was only mentioned explicitly for studies abroad, and seeing that many Brazilians directly connected life abroad with higher quality of life, this is not surprising.

In sum, this idea stresses the relevance and importance of nation branding efforts as an integral part of internationalizing higher education, and hence also supports the notion of having projects like Top Talent Denmark take on nation branding as part of its responsibility.

9.2.4 Challenges in Internationalizing Higher Education

Comparing the Brazilian dataset with the case studies reviewed in the theoretical section, it becomes evident that one of the largest challenges in internationalizing higher education is the diversity in target audiences. Although some motivations as well as barriers to study abroad appear

to be the same across countries, the structure of education systems in different countries differ significantly, as do students' particular motivations and perceived barriers (see figure 9.10 below):

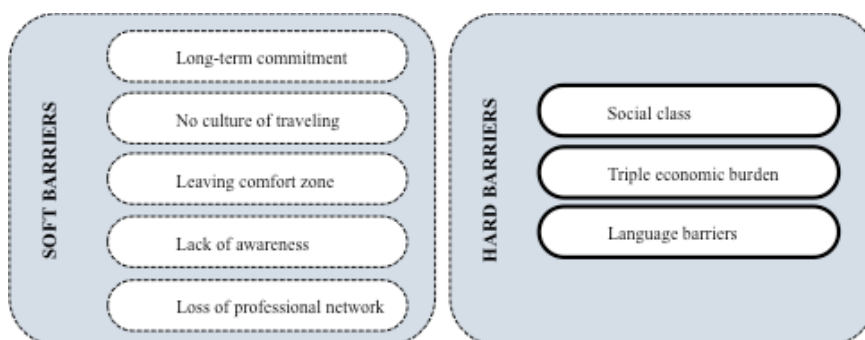Figure 9.10 Internationalization challenges for higher education
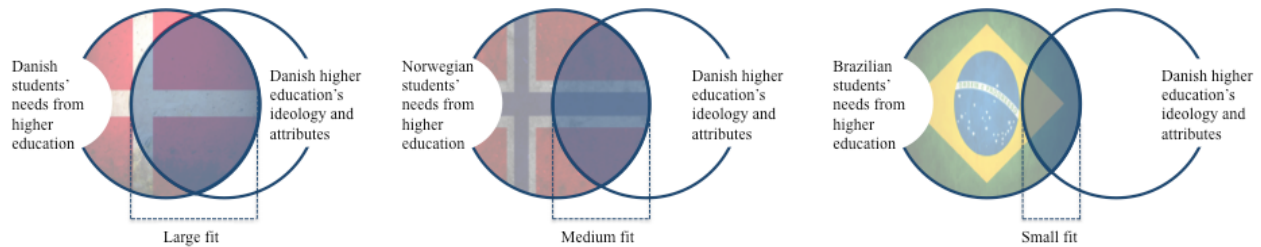
Source: Author's own illustration

The exploration of perceived barriers by the Brazilian students revealed that the choice of doing a full degree abroad – for them – is much more than merely the choice of a few years of studies abroad. Instead the decision to do a full degree abroad was seen as only the initial phase of a life outside of Brazil. This implies an even higher level of involvement in the decision, which needs to be noted in the branding of higher education to, in this case, Brazilian students. It also accentuates the need to integrate other facets in the branding of higher education, especially branding of the livability of the country and future job opportunities. Aside from this barrier, the other barriers identified in the interviews corresponded to existing knowledge in the theory of internationalizing higher education, highlighting again economic hurdles and language barriers as the main barriers for students being able to go abroad. A new finding however, looking through the dataset and the existing theory, is a *classification* of the perceived barriers into *soft and hard* barriers.

This classification is relevant for the internationalization of higher education as the measures required to mitigate the two types of barriers differ. The soft barriers do not actually prevent the students to go abroad to study, but instead represent mental barriers that must be addressed in a different manner than must the hard barriers. Soft barriers, such as lacking awareness of study opportunities abroad, or a resistance to leaving the comfort zone, can be addressed in marketing campaigns by highlighting the benefits, which often

Figure 9.11 Barriers for Studies Abroad

Source: Authors own illustration

comfort zone, can be addressed in marketing campaigns by highlighting the benefits, which often

come along with these challenges. In contrast, the hard barriers represent hurdles that cannot be removed through marketing. Interestingly, the hard barriers may very well be what hold students back, who otherwise have no doubts or fears with regards to studying abroad. But for universities to address these barriers, other initiatives must be launched, focusing specifically on how to guide students financially and competence-wise.
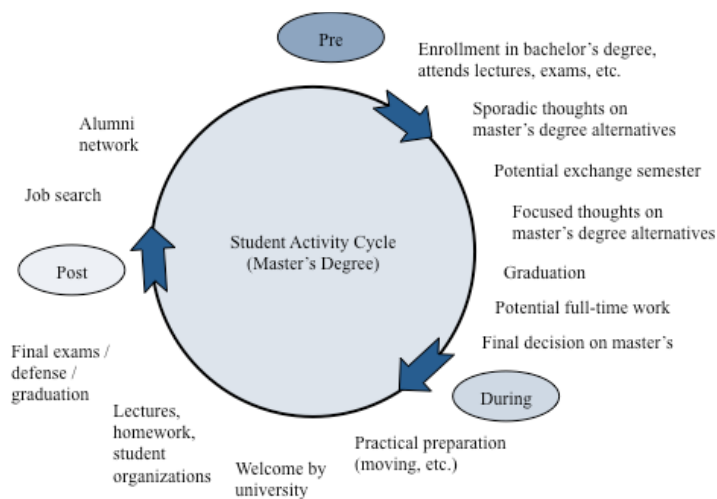
9.2.5 The Customer Activity Cycle for Higher Education

In the theory section, increased *longevity* of spending and increased *diversity* of spending were introduced as valuable outcomes from establishing a complete customer experience. However, both these terms stem from general brand management theory, and their applicability to higher education was not clear. Reviewing university and student interviews, their applicability to higher education has been clarified despite this sector's peculiarities:

- Longevity of spending: In the world of education, longevity of spending can relate to an exchange student choosing to apply for a full degree at the university.
  Another form of longevity of spending is represented by student recommendations or word of mouth. In contrast to many products/services, university services are characterized by most often being consumed just over a limited period of time by students, and true longevity of spending will hence be more related to positive referrals upon a student's graduation.

- Diversity of spending: Top Talent Denmark's focus on attracting talented Brazilians to Danish universities is inherently linked to the wish that more of these open their eyes for Danish career opportunities thereafter. Hence, what Vandermerwe (2000) phrases as "stretching into new areas of customers' lives" is exactly what a successful Top Talent Denmark can do through careful attention to the customer activity cycle: By attentively meeting the Brazilian students' expectations to the Danish higher education at every stage, these students can subsequently easier be attracted to Danish careers, which as known, is also a goal of Top Talent Denmark. It is clear that the concept of "spending" does not make immediate sense to the choice of a career, however, on a more abstract level, careers can be viewed as "internal products" being consumed by "internal customers", i.e. the employees (Sehgal and Malati, 2013).

Both outcomes are attractive and in line with the overall objective of the Top Talent Denmark project, and can – as suggested in the theory section – be reached by creating a compelling customer experience through understanding the customers' needs throughout the activity cycle.

Figure 9.12 Customer (Student) Activity Cycle

Source: Adapted from Vandermerwe, 2000

With this in mind – and with outset in the student interviews – the next paragraph outlines the various steps in the customer activity cycle, and drafts the specific cycle for *Brazilians' choice of higher education* (cf. figure 9.12). As the majority of the interviewees have been chosen due to their interest in a master's degree, the activity cycle has been drawn for the "purchase" of a master – a similar one could be made for PhD and post-doc.

What is most important to note, is the length of this cycle. The interviews revealed that Brazilian students already have thoughts on potential master's degrees and even PhD ideas, when they enroll in a bachelor's degree. According to several of the interviewees, during the first couple of years in the bachelor, Brazilian students sporadically consider master's degrees. A potential exchange semester abroad appeared to significantly increase students' thoughts on doing a *full degree* abroad, not least taking the exchange country into the considerations. At the end of the bachelor's degree, considerations for a master become more focused, and include mainly online research but also discussions with professors and other decision influencers as listed in the beginning of this section. The data suggest that many Brazilians need a couple of years on the job market upon graduation in order to financially prepare for a master's degree. It is noteworthy that the time period leading up to the purchase of master's degree (abroad) is longer than the actual time of consumption of the degree. This pre-consumption phase is simultaneously the one where foreign universities have the least access to the touch points with the students.

Wrapping up, the dataset has brought some important implications for the theory on internationalization of higher education by *suggesting*:

- a potential relation between level of study and which influencers are most salient to the decision making process of determining where to study (abroad) – and hence who to target in the international marketing of higher education.

- that university culture not only is formed by the employees of the institutions (as is normally the case for companies), but also by the *consumers* (university's own students) due to the

extent to which these actively shape the product offered by the university – this finding implies that universities should ensure that their brand identities are enacted *not only* by the employees but also by its consumers (i.e. the students).

- that students move focus to country image when no or little is known about the educational sector in a country. For the Brazilian students with no study experience in Denmark, neither of their responses on what they *imagined* to be the best thing about *studying* in Denmark was related to actual education, but rather to country characteristics.

- that the importance of country characteristics potentially increases as the perceived image of university quality decreases. If a student does not manage to get into a top school abroad, the weight of country image increases in line with a decreasing importance of university image. This ultimately suggests that branding efforts of universities with less than outstanding rankings should place even bigger importance on the country attractiveness.

- that studies abroad is more than a choice of study. For some nationalities at least, it is a long-term decision of leaving the home country for several years.

- that barriers for studies abroad may be classified into soft and hard barriers, easing universities' approach to mitigating barriers and hence attracting more foreign students.

- that the concepts of longevity and diversity of spending apply to higher education services as well – although on a more abstract level – and that the student activity cycle in a country like Brazil is comparably long, making it necessary to target students early on.

10. Discussion and Practical Recommendations

Whereas the previous two sections have provided a well-informed picture of the Brazilian reality with regards to higher education and an analysis of internationalization of higher education, this section will be a discussion of how the findings relate to the initial problem definition, as rewritten below – followed by a set of practical recommendations for ICDK:

> *How can ICDK develop a comprehensive brand for Danish higher education, resulting in the successful attraction of Brazilian talent to the seven Danish universities currently participating in the Top Talent Denmark project, and what factors are important?*

First of all, ICDK should take action to tightly integrate the efforts of branding the specific partners with the branding of Denmark. Brazilians that venture to study abroad seek not only a great university but also an attractive destination. And considering that Denmark's image is very weak in the mind of the average Brazilian student, the effort put into creating a greater awareness about Denmark should be intensified. Moreover, ICDK cannot ignore the fact that the Danish system for higher education is not 100 % compatible with that of Brazil's. Lengthy bachelor degrees make one-year master's degrees attractive, and the Danish system of full-time studies can make it hard economically for Brazilian students to sustain living, as they are used to being able to work simultaneously with their studies in order to maintain their financial security. Hence, efforts to increase the perceived compatibility between the Danish offer and the Brazilian needs are essential. Second, the data analysis suggests an advantage in identifying specific fields of expertise for the Danish universities as competition is evidently high, and the interviewees appeared to be attracted to studies abroad, especially in countries that were considered advanced within their particular fields of study. As a result, the success of Top Talent Denmark will depend on its ability to motivate the Brazilians, which is why ICDK should develop a marketing framework wherein the findings on overall and specific motivations for studies and studies abroad are used to bolster interest in Danish universities. Finally, for the successful attraction of Brazilian students to Danish higher education, it should be noted that the decision making process for the different levels of higher education in Brazil is highly dependent on previous decisions made by the individual, and attracting the best, therefore, requires reaching the students already in their initial years of university studies.

While the study of the 13 participating interviewees has provided deep insights into the Brazilian reality, further studies will be useful for establishing results representing the broader student population in Brazil. In the following, with the help of theories and the empirical study, the overall

suggestions from above will be developed into *tangible suggestions* for ICDK to reach its objective of attracting more Brazilian students to Danish universities. It must be noted that the aim of the thesis has been to improve the attraction of Brazilian talents to Danish higher education in general, as why some of the recommendations lie *outside* of Top Talent Denmark's current scope as a marketing platform. First listed are the recommendations that lie *within* the current scope of TTDK.

(1) From Phase 1: In-depth Interviews → Phase 2: Online Questionnaire

The in-depth interviews and analysis thereof have provided profound insights into the target group of Brazilian students. However, whereas the in-depth interviews have provided ICDK with depth, a quantitative technique will be needed to provide the breadth – i.e. give a broader picture of what matters the most to the target group, and how weak the image of Denmark and its higher education system in fact is. Therefore, the first recommendation for ICDK is to go on to the second phase in the quest of getting to know the Brazilian talents. For this purpose, a questionnaire has been developed (please consult appendix 6), ready for ICDK to pilot test and subsequently distribute to relevant universities. In appendix 6.1, the reader will find the methodological choices regarding the development of the questionnaire.

(2) Integrating Nation Branding

One of the main findings from this study was that international students choose not merely a university but also a country when going abroad for studies. At the same time, the data uncovered a weak image of Denmark. Directly derived from these findings, ICDK is advised to look beyond the creation of a brand for Danish higher education, caring also for the *overall* brand of Denmark in Brazil. In particular VisitDenmark, and www.denmark.dk appear to be interesting partners for ICDK. Denmark has several entities supporting different elements of the Danish image, but little collaboration exists, and a potential for synergies remains untapped. A concrete example would be, for ICDK to establish Facebook-partnerships with VisitDenmark (which has regular updates just as Top Talent Denmark and over 200,000 followers compared with Top Talent Denmark's 2,900). Also StudyinDenmark exists on Facebook, though with seemingly less resources for updates and user interaction. Nonetheless, all three sites could benefit from collaboration, easing the dissemination of good content relating to Denmark.

On a higher political level, it is advised to focus nation-branding efforts specifically towards Brazil and the other countries from which Denmark aim to attract talent for studies and careers.

Synergies could be realized from having nation branding activities running *alongside* the branding efforts from ICDK in Brazil (and China). The Danish government launched in 2014 *Denmark at Work - Plan for Growth in Danish Tourism* to attract more tourists to Denmark. With said program a number of potential marketing synergies could arise by allocating a portion of the resources intended for nation brand building toward the strategic growth markets from which Denmark also seeks to attract talented students and employees.

(3) Broadening the Scope of Branding Danish Higher Education

Just as the general image of Denmark proved weak in the dataset, so did the image of Danish higher education. Despite a generally positive image, little concrete knowledge was found. This finding advocates for ICDK and Top Talent Denmark to diffuse content *not only* on universities' programs, but also on the particular strengths of Danish higher education: be it great libraries, open universities, or promotion of the specific teaching styles and differences in learning environments from those in Brazil. Brazilian student bloggers currently studying in Denmark can serve as great communicators of these stories.

(4) Building Brand Equity and Establishing Fields of Excellence

As seen, the perceptions of Denmark and Danish universities depend on whether or not the Brazilians have ever been on exchange in Denmark. For the group with no study experience in Denmark, images are weak and poorly informed. For the group with study experience in Denmark strong images have been established for both the country and its universities. The implication for the brand-building run by ICDK is that branding can occur on two levels depending on the two different target groups. The majority of Brazilian students have no study experience in Denmark, and for this target group the objective must be to establish *awareness* and a positive *image* of Denmark and the Danish universities (cf. CBBE pyramid in figure 7.10). Familiarity was listed as the most influential factor on brand image. For Denmark to attract more Brazilian students on the master's level and PhD levels it is hence important that these prospects are familiarized with Denmark at an earlier stage. This stresses the relevance of focusing on increasing the exchange of bachelor students, but also different Danish events can be used to familiarize Brazilian students *in* Brazil. Beyond the current existence of Denmark Days, more events for alumni students could be held in Brazil by ICDK with relevant themes such as "Financing a Degree in Denmark", "Applying for Jobs in Denmark", etc.

For the group of Brazilians that have been to Denmark on exchange, ICDK should focus on keeping them interested in Danish opportunities – be it full degrees, PhDs or careers. When brand value and brand loyalty are the objectives here, ICDK's task is to convince the Brazilian prospects that there is a balance between value and price. Hence, for the branding of the Danish universities, figure 6.4 (cf. price for European master's degrees) cannot be overlooked. The price for Danish master's degrees is comparably much higher than most alternatives in the rest of Europe. To make sure that Brazilians perceive a balance between this price and the value provided, ICDK is recommended to identify certain fields of excellence in each of the partner universities. What are the fields where Danish education is unmatched? This information is critical in order to strongly position Danish education and justify the comparably high price.

(5) Brand Denmark and Danish Education with Outset in the <u>Brazilian Reality</u>

First of all, ICDK is advised to revise its current branding of Denmark (e.g. the section on Denmark on TTDK's website) so it fits with what Brazilian students see as particularly attractive about Denmark. The study revealed that the current branding claims – promoting for instance Denmark's winters as "mild" – are far from the Brazilian perception. Instead, security, ease of getting around, and friendly people appeared to be more relevant attributes to highlight on the website, the latter being especially important to counter the fear of meeting "cold" people in Denmark. The accuracy of this task can benefit from awaiting the questionnaire findings.

Second of all – and relating back to figures 7.8 and 9.10 – a recommendation for ICDK is to diminish the gap between the Danish offer and the Brazilian students' wants and needs. Three prominent gaps are: First, the structure in educational system, where Brazilians take between 4 and 7 years (generally) to complete their bachelor's degree (cf. interviewees' completion times). Second, it is normal (and financially necessary) for many Brazilians to work up to 30 hours weekly on top of studies. Third, the Brazilian students wanting to pursue an *academic* career are in need of a good network with Brazilian researchers for future job opportunities – which is obviously challenged if choosing to study outside of Brazil.

Gaps like those cannot simply be eliminated. But ICDK can try to counter those challenges by, for instance, reporting stories from alumni students with relevant experience in Denmark. In this way, shaping the needs and wants of the Brazilians to come closer to the Danish offering. Moving the "Danish circle" (cf. figure 7.8) towards the Brazilians' needs is inherently more difficult, as Danish education is targeted at hundreds of different target groups.

(6) Student Activity Cycle and Bachelor Focus

The activity map (cf. figure 9.12) illustrates where the universities (/Top Talent Denmark) can add value in the student prospects' process of "education consumption" from problem recognition to post graduation. The data indicated that Brazilians' choice of higher education stretches over a long period of time, and choice of master's degree can be made already from the beginning of the bachelor's degree or before. Also, the data showed that Brazilians' who had taken an exchange semester in Denmark during their bachelor had a significantly better image of Denmark and were more likely to be interested in pursuing a full degree there. Both these findings suggest that the attraction of Brazilian students to full degrees can be spurred on by branding efforts targeted at the Brazilian *bachelor students.* This should be supported by improving bilateral agreements between the Danish and Brazilian universities, in order to accommodate an increased number of exchanges between Denmark and Brazil.

(7) Scholarship Services

As the most frequently stressed barrier for studies abroad for Brazilians was the *triple financial burden* as discussed in the analysis section. Seeing that Denmark is amongst the most expensive European countries for Brazilians to do a full degree in, attraction of Brazilian students will depend on the extent to which they can afford these degrees. Acknowledging this, ICDK is advised to promote the financial opportunities that Brazilians have for studies in Denmark.

As part of the governmental strategy from 2013 to attract foreign talent (non EU/EEA), the Danish government has agreed to launch a new scholarship program from 2015-2017, allocating DKKR 25 million for scholarships geographically targeted at students from Brazil, India, China, South Korea, the United States and Japan. It is, therefore, natural that ICDK should promote the opportunities in Brazil to ensure as many qualified applications from Brazil as possible. Aside from this highly targeted program from Denmark, ICDK can further service the Brazilian student prospects by gathering and presenting information on where Brazilians can look for financial support (be it from Brazil or elsewhere), as well as look at alternative ways of financing studies (student job / internship opportunities).

Concretely, this information could be disseminated through Facebook posts and through a separate section on www.toptalentdenmark.com.br. In line with the "brand building recommendation", it is especially important for ICDK to communicate these options to alumni students, as they have the interest for studying in Denmark – but not always the financial means.

(8) Language Classes

At present, it is possible for foreign students in Denmark to get free Danish classes. The Brazilian students expressed concerns about living in a country where they don't know the native language, suggesting that Danish classes may be a good offer for international students, although short stays would often not lend itself to learning Danish. At the same time, Brazilians expressed that one of the most difficult aspects about studying in Denmark was studying in English. This finding – together with the fact that English is more broadly useful than Danish – implies that Denmark or the Danish universities could benefit from marketing Denmark even more as an English-speaking nation by offering free English courses prior to or alongside university studies. The fact that Brazilian degrees usually end in December whereas Danish degrees start in September gives half a year where Brazilian students could study English and work in Denmark up to study start, easing the studies both language-wise and financially.

(9) Career Path Integration

Improving career opportunities was a strong motivating factor for Brazilians' choice of higher education. One of the ways that Denmark could differentiate its offers in higher education internationally would be through a tighter integration between full degrees at Danish universities and simultaneous or subsequent career paths in Danish companies. Seeing that Top Talent Denmark consists of both university and company partners, the potential already exists. Drawing on the views from Trine Monty from KU, tighter integration would require a stronger inclusion of the Danish companies' *headquarters* in Denmark – as opposed to the local subsidiaries, who often recruit graduates already after the bachelor. The integration will require that universities and companies agree on certain recruitment parameters, so that a Brazilian student going to KU for a master's degree will be seen as attractive for e.g. Novo Nordisk upon graduation. University programs already exist where companies act as mentors for talented students, and where the students are slowly integrated into companies during their studies. Also the governmental scholarship program introduced above includes such company-student relations, further confirming that this type of integration is possible. As proposed by Trine Monty, the Danish companies' headquarters can, at a relatively low cost, initiate an integration of those foreign students that KU and the other Danish universities already attract to Denmark – be it for a full degree or an exchange, bachelor, master or PhD. Aside from being cheap, this could allow the Danish companies an early access to the talent – talent that as a bonus already is

becoming accustomed to the Danish culture through their time at Danish universities. This is indeed an important point, as highly qualified employees (PhDs for instance) that are recruited to Denmark at a later stage often stay for a shorter time due to integration problems. Finally, Trine Monty mentions an interesting potential to be found in the inclusion of Danish SMEs into TTDK. These have far less muscles with regards to international recruitment, but may be interested in growth markets like Brazil, China and others. In sum, ICDK is advised to identity the relevant HR people in the Danish partner companies' headquarters, and discuss the benefits of the integration as well as review suitable strategies for said integration. Furthermore, ICDK is recommended to consider the inclusion of Danish SMEs – that could have an interest in the Brazilian market, but less resources to recruit the talent – as these companies could benefit greatly from the integrated efforts, increasing the chances of an actual university-company collaboration – to the benefit of both company, university and of course the Brazilian student.

(10) Internal Communication – Educating Our Own

The final recommendation is derived from the analysis on multiple foci in nation branding and higher education branding.

On the sector level, Danish universities must ensure that not only their employees enact the values that our universities preach (hereunder interactive learning), but also the students as these take part in creating the "product" that other students consume. When Brazilian students express surprise at seeing Danish students engaged more with Facebook than with lectures, there is reason to believe that culture does not equal vision, ultimately harming the brand image.

In a similar vein, the fact that more Brazilian students expressed concerns about encountering the *cold Danes* gives reason to a national revision on how we want to be perceived abroad – and potential actions to improve this. The concern expressed by the Brazilian students was confirmed in a recent report on travel and tourism competitiveness from the World Economic Forum (2013, p. 153), where Denmark ranks **117** out of 140 countries on "attitude of population toward foreign visitors". Such attitudes are not only harmful to Denmark's ability to attract tourists, but also, foreign students and workers. Perhaps even more so, as the last-mentioned groups usually stay longer than do tourists.

11. Concluding Section

11.1 Critical Reflections

Some of the study's limitations were known in advance and hence addressed already in section 5. However, throughout the research-process, extra limitations emerged as reflected upon below.

Interview Guide Development

In the first couple of interviews – guided by the theory – questions aiming at understanding how the Brazilians viewed some detailed characteristics about Danish higher education were used. It quickly became apparent that this was not useful due to the limited knowledge they possessed. Since, interview guides were adapted, increasing the focus on the broad, open questions.

Response Quality

As known, interviews were kept in English, as Top Talent Denmark's target group must be able to study in English, but inevitably, language barriers exist to a greater degree than if interviews had been run in Portuguese. This must also be a consideration of ICDK for the questionnaire, whether they want to translate the proposal presented in appendix 6.3 into Portuguese to improve the response quality.

Finally a critical view on the reliability of the study: As the Brazilians were interviewed by a Dane, there is a risk that they have not felt comfortable sharing their honest perceptions about Denmark and Danish higher education – even though they were encouraged to speak freely.

University Identity and Culture

Whereas the study has included interviews with university representatives, only four of the seven partner universities have been heard, and neither top management nor professors have been interviewed, limiting the degree to which the study has been able to provide insights into the vision and culture of Top Talent Denmark's partner universities.

11.2 Conclusion

Denmark's participation in the war for global talent is reflected now in several governmental strategies and in the (expanded) use of geographically targeted talent programs as Top Talent Denmark, where one aim has been the attraction of Brazilian talent to Danish higher education. However, competition is fierce, not least for a small country with comparably high tuition fees. This thesis has addressed this challenge with an outset in branding theories and an empirical study of

both the Danish offer and the Brazilian students' current reality. Aside from bringing about a list of practical recommendations for Innovation Centre Denmark, the data analysis may in fact contribute to the further development of both theories for nation branding and higher education branding. More studies are needed to determine whether the case study has broader implications, but regarding Brazilians specifically, existing theories are challenged, and revisions suggested. For one, the brand architecture of Denmark showed that Danish universities and the mother-brand, Denmark are locked together, arguing for a tight integration of the efforts to internationalize higher education and nation branding in more general terms. The analysis further indicated that weak nation brands are influenced not only by supranational brands (if existing), but also more broadly by geographically proximate countries or even the entire continent in which the country is located. For the internationalization of higher education, it was demonstrated that the factors influencing the Brazilians' choice of studies abroad differed depending on level of study. Also, the study suggested that university culture is not merely made up of the actions of the university's employees (as is the case for companies), but also by the actions of its consumers (i.e. the students). The analysis moreover showed that Brazilian students tended to place a bigger importance on country characteristics, when the performance of *possible* host universities was not perceived as outstanding – underscoring the view of studies abroad as a *composite* product. Another interesting finding was that Brazilian students already consider master and PhD degrees when they choose their bachelor's degree, and the decision of studying abroad is similarly considered to be a long-term decision, representing *more* than merely a choice of studying abroad for a year or two. In relation to the continuation of studies (abroad or at home), the two concepts of longevity and diversity of spending (from general brand management theory) showed applicable to higher education too. Finally, the empirics together with existing studies has given birth to the classification of barriers for international studies into soft and hard, easing Top Talent Denmark's background for addressing the most common hurdles and hence attracting more Brazilian students to Denmark.

Whereas all the points above relate to a discussion of *existing theories* applied to the Brazilian reality, they also contain important clues as to the *concrete* development of the Top Talent Denmark brand and ultimately meeting the goal of attracting more Brazilian students. In sum, ten practical recommendations were derived from the analysis of data and theories; some of which lie within the current scope of Top Talent Denmark, some of which require an expanded scope of the platform. Nation branding is highlighted as a central tool for the development of a brand that is able to encompass the variety of Danish universities, and so is joint efforts by the universities in

establishing a common brand identity. ICDK basically has two different Brazilian target groups (one with experience from Denmark and one without) and while *both* are important in terms of attracting more Brazilian talents, they demand different information and services from ICDK. In general, ICDK is advised to revise its current branding of Denmark with regards to Brazilians, and, for the future, brand Denmark with outset in characteristics that are (1) distinctive for Denmark and (2) seen as attractive by the Brazilians. Beyond the current scope of Top Talent Denmark – but still within the scope of the problem statement and broader governmental strategies – financial support (regarding both actual support and information services about how to fund studies in Denmark), English classes, and a tighter integration of Danish career paths are suggested. Finally, the thesis exposes a need to examine the Danish culture – *in* lectures as well as *outside* lectures – as both the Danish student culture and national culture affects the way we are perceived abroad, and hence our ability to attract foreign talent.

11.3 Perspectives for Future Research

On a theoretical level, the findings from this thesis stem from the Danish-Brazilian case study and can by definition not be generalized. However, as indicated earlier, the results may hide some more general trends, giving ground for further research of the broader applicability of the findings.

On a practical level, ICDK and Top Talent Denmark can benefit from the continuing study of Brazilian students, taking a more narrow focus in the future: where this thesis has examined the general attraction of Brazilian talent, some partner universities have expressed interest in getting to know more about the specific attraction of PhD and post-doc students.

Also, it would be interesting to see how the findings about Brazilians' choice of higher education can be applied to the other half of Top Talent Denmark, i.e. the attraction of more Brazilian talents to Danish career paths.

Finally, as Top Talent Denmark is not solely focused at Brazil, it would be relevant too to look at how findings from this study may contribute to the talent attraction from other countries than Brazil.

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Appendices

Appendix 1 Interview Guides

Appendix 1.1 Interview Guide Lars Christensen, ICDK China

(1) Mål med oprettelsen

- Hvad var det oprindelige mål med oprettelsen af TTDK?
- Er det rigtigt forstået, at det er en del af Danmarks vækststrategi?
- Hvad er rationalet bag målet med at tiltrække særligt dygtige kinesere – og nu brasilianere – til danske institutioner og virksomheder?
- Måler man på nuværende tidspunkt på udbyttet af TTDK?
- Hvad er/kunne være relevante måleenheder?

(2) Platform eller program

- Som jeg har forstået det på Signe, er TTDK en platform, hvor danske virksomheder/universiteter kan markedsføre sig på – er der nogle "særlige gulerødder" for særligt dygtige kinesere/brasilianere, der vælger DK?
- Tror du det er muligt at konkurrere mod store nationer, som Tyskland og Frankrig, hvis ikke der er nogen egentlige fordele for dem der er særligt dygtige?
- Ser du en mulighed for at videreudvikle platformen til et egentligt program for et begrænset antal?
- Hvilke ting kunne man efter din mening gøre for, at gøre det mere attraktivt at komme til DK?

 (3) Erfaring fra Kina

- Hvad har virket særligt godt med TTDK i Kina?
- Har der været nogen komplikationer med TTDK i Kina?
- Hvordan har udviklingen været?
- Hvor ofte holdes Denmark Days?
- Hvad er responsen fra de danske universiteter?
- Hvad er responsen fra de danske virksomheder?
- Er det alle danske universiteter man har fået med til at deltage?
- Hvad er næste step? Udvikles platformen yderligere?

(4) Idéer til hvordan TTDK kan blive en succes i Brasilien

- Hvilke gode råd har du til ICDK i Brasilien, der netop har startet TTDK op?
- Hvordan mener du at dansk uddannelse adskiller sig fra øvrige landes uddannelse?
- Andet?

Appendix 1.2 Interview Guide Signe Stokholm, ICDK Brazil

(1) TTDKs oprettelse i Brasilien

- Hvornår startede du med Top Talent Denmark i Brasilien?
- Hvordan husker du starten med Top Talent Denmark?
- Hvordan var samarbejdet med Kina til at starte med? Inspiration derfra osv.
- Husker du, hvad idéen med Top Talent Denmark var, da den blev introduceret for dig?
- Hvad var ambitionerne med programmet da du startede?
- Hvordan var kommunikationen fra ministeriet helt i starten?

(2) TTDKs udvikling i Brasilien (første 9 måneder)

Nu har du arbejdet med projektet i omkring 9 måneder:

- Hvordan føler du, at projektet har udviklet sig fra det startede i Brasilien?
- Hvis du skulle udpege et par højdepunkter fra projektets første levetid, hvilke ville det være?
- Hvad har været den største udfordring med projektet i de første 9 måneder?
- Hvad har du set som den største sejr gennem de første 9 måneder?
- Hvilken feedback har du fået fra de deltagende universiteter (god som dårlig)?
- Hvilken feedback har du fået fra de deltagende virksomheder (god som dårlig)?

(3) TTDKs nuværende status i Brasilien

- Hvor ser du, at projektet har skabt mest værdi?
- Hvordan ville du beskrive projektets nuværende status målt mod ambitionerne fra begyndelsen? 40 min

(4) TTDKs fremtid i Brasilien

- Hvis du kunne ændre noget på projektet – hvad ville det være (hvis noget)?
- Hvor ser du projektets største forcer og dermed potentiale for at skabe værdi for dets partnere?

Som vi har snakket om, kan det være svært, at vide sig sikker på, om alle interessenter føler der er værdi nok i programmet:

- Mener du, at der skal være et skift i interessentgrupper?

Projektet kører som pilotprojekt indtil slutningen af i år:

- Hvad skal til – ifølge din mening – for at projektet videreføres til næste år?
  - o I nuværende eller ændret format…
  - o Virksomheder værdi?

Appendix 1.3 Interview Guides – The Four Universities (KU example)

(1) Baggrund for medvirken (jf. vision-culture gap)

- Hvor længe har du arbejdet for KU eller en anden dansk institution for videregående uddannelse?
- Hvornår og hvordan blev du (/Internationale Kontor) kontaktet af Innovation Centre Denmark i Brasilien med idéen?
- Hvad er KU's motivation for at deltage i Top Talent Denmark projektet?
- Hvad er KU's erfaring med deltagelsen i projektet?
- Du har selv deltaget i Denmark Days; i hvor høj/ringe grad er det dit indtryk, at Top Talent Denmark platformen promoverer et retvisende billede af danske universiteter og det at studere i Danmark?
- Mener du at platformen *kan* fungere for alle – og inspirere alle – de forskellige danske universiteter?
- I hvor høj/ringe grad mener du, at man på nuværende tidspunkt med Top Talent Denmark formår at differentiere dansk uddannelse fra øvrige landes tilbud?
- I hvor stor grad mener du, at projektet er relevant for KU?
- Hvad kunne gøre TTDK mere attraktivt for KU?
- Hvad er planerne for aktiv medvirken i arrangementer afholdt af ICDK i Brasilien?
- Hvorfor er det vigtigt at tiltrække dygtige brasilianere til Danmark?
- Hvorfor er det vigtigt at tiltrække dygtige brasilianere til KU?
- Hvilke uddannelser vil det være mest relevant for KU at tiltrække brasilianere til?
- Ved du hvor mange stipendier I har til rådighed til kandidater og Ph.d. studerende hvert år?

(2) Syn på dansk uddannelse (jf. "two foci in nation branding")

- Hvad ser du som KU's kernekompetencer? Er de unikke når man kigger internationalt?
- Hvad mener du skal være det langsigtede mål for dansk videregående uddannelse?
- Hvad mener du er formålet med dansk videregående uddannelse? Hvad er jeres kerneopgave?
- Hvilke værdier tænker du er de centrale for dansk videregående uddannelse?

Jf. "nation brand positioning"

- Hvad tænker du, at Danmark bør positionere sig på internationalt? Hvilke særtræk ser du i *dansk* uddannelse?
- Hvem ser du som Danmarks stærkeste/direkte konkurrenter? Hvad kan vi gøre for at slå dem?
- Hvad tænker du, at det største udbytte er for brasilianere der kommer til Danmark for at studere?
- Hvad ser du som de største barrierer for brasilianere for at komme til Danmark at studere?

(3) Kontakt med de kommende studerende og studerende (jf. "touch points")

- Hvordan tiltrækker I nye studerende fra andre lande?
- Gennem hvilke medier?
- Hvor (fysisk som elektronisk) kommer studerende i kontakt med jer på KU?

(4) Forslag til forbedring af programmet

- Har du nogen umiddelbare tanker til, hvordan TTDK kunne forbedres så flere brasilianere ville finde det attraktivt at komme til et dansk universitet?

Ser du nogen idé i og mulighed for, at man udviklede platformen til at indeholde specifikke fordele for brasilianske studerende?

Appendix 1.4 Interview Guide – Brazilian Students (no experience in DK)

Structure of interview

1. Choice of higher education study (general)
2. Thoughts on studying abroad
3. Thoughts on studying in Denmark

Introduction

- What are you currently studying?
- What are you considering studying? And where?

In the following I will ask you some questions about how you plan to decide where to study

PART 1 – CHOICE OF STUDY (GENERAL)

Cf. Higher Education Branding

- When did you start considering doing a [master/PhD/doctorate]?
- Why do you want to do a [master]?
- What is a great university in your opinion?
- What is the most important for you when choosing where to study? Ratings, etc.?
  Also related to touch point theory (information before-consumption)

Cf. Touch Point Theory
- Where do you prefer to find your information? Online, brochures, university days, fairs, etc.
- Will you discuss your decision with anybody? (Decision Making Process)
- When do you start / did you start thinking about where to study?
- Where do you / did you start looking for information?
- What do you need of information when you begin the program? I.e. during consumption
- Do you expect to have any contact with your university *after* you graduate?

PART 2 – STUDIES ABROAD

- List the three countries where you would prefer to do a degree (can be Brazil too). Why no. 1?
- Why do you think that someone goes abroad to study?
- What barriers are there for going abroad to study?
- Have you been considering yourself to do a degree abroad?

PART 3 – STUDIES IN DENMARK (Country and Universities)

Cf. Brand image

- Show image of Europe – do you know where Denmark is?
- What do you think about when you think of Denmark?
- What would be the best about studying in Denmark do you think?
- What would be the worst about studying in Denmark do you think?
- From where have you heard about Denmark?
- What would your family think about you studying in Denmark?
- What would your friends think about you studying in Denmark?
- Do you know any Danish companies that are here in Brazil?

Perception of Danish universities
- What do you perceive as advantages from going to a Danish university?
- What would you perceive as barriers and disadvantages?

- Salience
    - Can you think of a time where Denmark came to your mind?
    - Can you mention any Danish universities?
- Performance
    - How would you imagine the lecturing at a Danish university?
    - Would a degree from a Danish university affect your career opportunities in any way?
    - Earlier you mentioned [3 countries] as the most attractive for you to study – how do you believe a degree from there would be better than one from Denmark (if DK was not one)?
- Imagery
    - How do you imagine student life in DK? Compared to Brazil?
    - How do you imagine life (outside university) in DK? Compared to Brazil?
- Judgments
    - Quality – how would you perceive the overall quality from a Danish university?
    - Credibility – how useful would you say taking a degree in DK would be?
    - Consideration – would/have the person been consider(ing) Denmark?
- Feelings
    - How would you feel about studying at a Danish university? (possibly only relevant for alumni)
- Resonance
    - Only relevant for alumni

Appendix 1.5 Interview Guide – Brazilian Students (alumni from Danish university)

Introduction

- What is your current occupation? Studies, job?
- What did you study in Denmark? Degree, program?

In the following I will ask you some questions about how you decided where to study

PART 1 – CHOICE OF STUDY (GENERAL)

Cf. Higher Education Branding

- When did you start considering doing a [master/PhD/doctorate]?
- Why did you decide to do a master?
- What is a great university in your opinion?
- What was the most important for you when choosing where to study? Ratings, etc.?

Cf. Touch Point Theory
- Where did you prefer to find your information? Online, brochures, university days, fairs, etc.
- Did you discuss your decision with anybody?
- When did you start thinking about where to study?
- Where did you start looking for information?
- What did you need of information when you began the program? I.e. during consumption
- Do you have any contact with the Danish university now after you came back?

PART 2 – STUDIES ABROAD

- List your top 3 countries of where to study (can be Brazil too). Why no. 1?
- Why do you think that someone goes abroad to study?
- What barriers are there for going abroad to study?

- Why did you choose to do a part of your degree abroad?
- You have been studying in Denmark, were there any alternatives you were considering?

PART 3 – STUDIES IN DENMARK (Country and Universities)

Cf. Brand image

- What do you think about when you think of Denmark?
- What was the best about studying in Denmark do you think?
- What was the worst about studying in Denmark do you think?
- Did anything in Denmark surprise you?
- What did you see as the biggest differences between living/stuyding in Denmark and Brazil?
- What did your family think about you studying in Denmark?
- What did your friends think about you studying in Denmark?
- Do you know any Danish companies that are here in Brazil?

Perception of Danish universities
- What do you perceive as advantages from going to a Danish university from a Brazilian perspective?
- What did you see as barriers and disadvantages from a Brazilian perspective?

Cf. CBBE

- Salience
  - o Can you mention any Danish universities?
- Performance
  - o How do you describe the quality of curriculum and courses in a Danish university?
  - o How do you describe the quality of quality of the lecturing at a Danish university?
  - o Has studying at a Danish university affected your career opportunities in any way?
  - o Earlier you mentioned [3 countries] as the most attractive for you to study – how do you believe a degree from there would be better than one from Denmark (if DK was not one)?
- Imagery
  - o How would you describe student life in DK? Compared to Brazil?
  - o How would you describe life (outside university) in DK? Compared to Brazil?
- Judgments
  - o Quality – how would you describe the overall quality from a Danish university?
  - o Credibility – how useful would you say taking a degree (/semester) in DK has been?
  - o Consideration – looking back, would you have done it again – studying in Denmark?
- Feelings
  - o How did you feel about studying in Denmark?

- Resonance
  - o Do you feel any attachment to Denmark overall? How would you describe it?

VI

Interview notes and transcriptions not available in this file.

Appendix 4 - Questions to Identify Identity-Image Gaps

In the illustration below, questions to identify identity-image gaps in Top Talent Denmark have been outlined by drawing on the guidelines from Hatch and Schultz (2001).

Identifying vision-culture gaps	Identifying image-culture gaps	Identifying image-vision gaps
• Do the Danish universities practice the values that Top Talent Denmark promotes? • Is the Top Talent Denmark vision *differentiating* the Danish higher education from other countries?	• What images do Brazilian students associate with Danish universities? • How do university employees and Brazilian student prospects interact? • Do the university employees care what the Brazilian student prospects think?	• What do the Brazilian student prospects want from higher education, hereunder from Top Talent Denmark? • Is Top Talent Denmark's vision effectively being communicated to the Brazilian student prospects?

Appendix 5 –Illustration of Brazilians' Motivations for Higher Education

In the illustration below, Brazilians' five fundamental motivations for higher education in general have been listed.
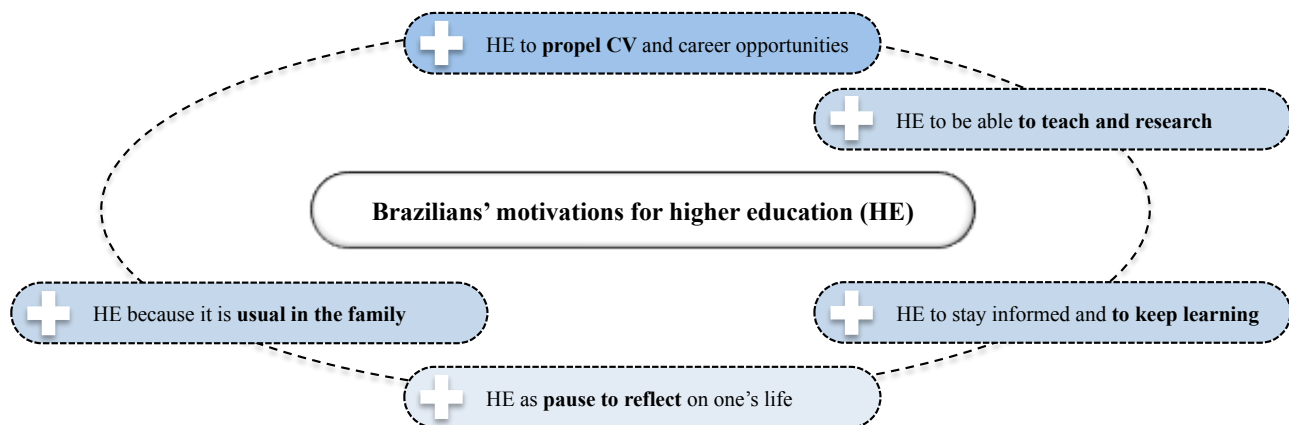
Appendix 6 Questionnaire

Appendix 6.1 Questionnaire Development

WHY

The in-depth interviews used in this thesis have been a viable first means of data collection considering the low degree of information on Brazilians' choice of higher education and image of Denmark and hence the mainly exploratory nature of the study. With insights established from the qualitative research already carried out, ICDK is advised to continue the research by means of quantitative techniques, as this will enable more conclusive findings on Brazilian students' choice of higher education – at home and abroad (Malhotra and Birks, 2007, p. 70). Therefore, a questionnaire has been developed, ready to use for ICDK (see appx. 6.2 and 6.3).

HOW

The questionnaire has been developed following the 10 steps of the questionnaire design process as proposed by Malhotra and Birks (2007, p. 375) – except for the last two steps (reproduction and pilot-testing of the questionnaire), which will be in the hands of ICDK. The foundation of the questionnaire is the information need, and with point of departure in the problem definition and the findings from the qualitative study, this boils down to creating quantitative measures for the three overall parts as follow:

(1) motivations for university studies in general, (2) motivations and challenges for studies abroad and (3) image regarding Denmark and Danish universities. To quantify the respondents' answers, the Likert scale has been adopted throughout the questionnaire. This means that respondents rate their degree of agreement to a range of different statements about motivations for studies and their associations to Denmark on a scale from 1-5. The introduction is used to spur interest in taking the survey, explicitly stating how the respondent may benefit from going through the questionnaire. The opening questions should be simple, interesting and non-threatening (Malhotra and Birks, 2007, p. 388), as why for instance demographic questions have been moved to the end of the survey, seeing that such questions certainly aren't interesting, and some respondents may find questions about for instance age sensitive. Having completed the rest of the questionnaire, the chances of respondents answering this type of questions increase. Ordinary words have been used throughout the questionnaire to match the vocabulary of the respondents, but ICDK should consider translating the questionnaire into Portuguese to avoid any type of misunderstandings regarding language.

WHO

The questionnaire is targeted at Brazilian students who are currently enrolled at university (i.e. at least bachelor level). At this point in the study, the research will be focused at the target group of students who at minimum *consider* studying abroad – or have studied abroad, as this is ultimately the target group of Top Talent Denmark. However, also students who have no considerations about studying abroad are surveyed, but more so with regards to the reasons for not wanting to study abroad.

Appendix 6.2 Questionnaire Flowchart
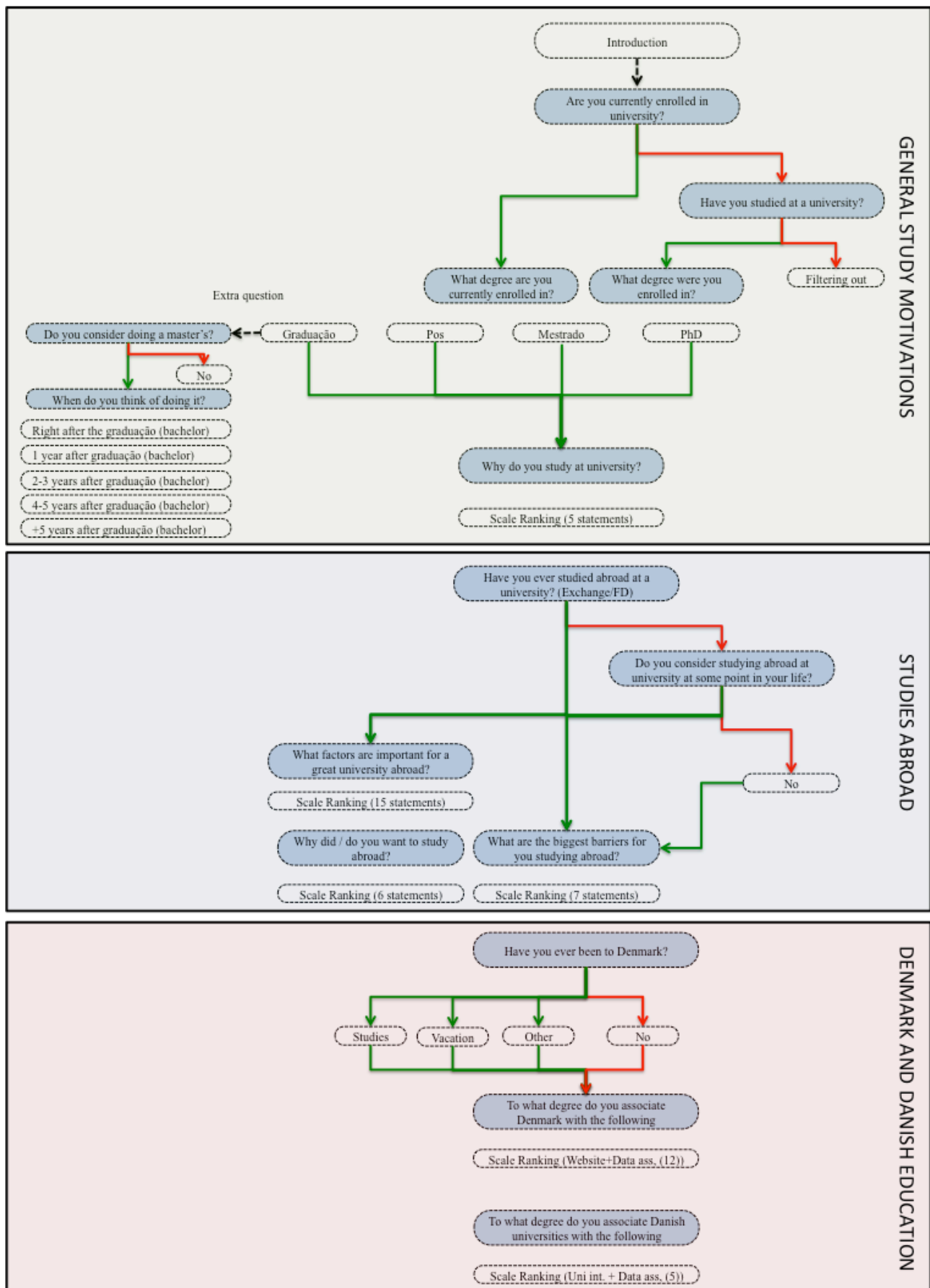
Appendix 6.3 Questionnaire Proposal

In the following, the actual questionnaire proposal is outlined. As mentioned in the thesis, ICDK should carefully consider whether it would be beneficial to translate the questionnaire into Portuguese to avoid language-based misunderstandings, thus way improving the response quality.

Introduction

Dear Brazilian student,

Thanks for taking your time to help us, at Innovation Centre Denmark, to understand more about Brazilian students' choice of higher education. With your responses, we will be able to better meet the Brazilian students' needs with regards to higher education. Also by going through the questions, you will learn more about your own motivations for studies, and hopefully this can make it easier for you to make the right decisions in the future regarding your studies and career. Your response will only be used for survey purposes, and you will be guaranteed anonymity.

Also, as a token of our appreciation for your help, you will get the chance to win a ___ by the end of the questionnaire.

Questions begin on the following page.

(1) Are you currently studying at a university? / Have you ever studied at a university?

Yes ☐   No ☐

(2) What degree are you currently taking? / What degree did you take at university?

Graduação ☐ Pós ☐ Mestrado ☐ PhD ☐ Doutorado ☐

(3) Do you consider doing a master's degree? (Extra question for those responding "Graduação")

Yes ☐   No ☐

(4) When do you think of doing it? (Extra question for those responding "yes")

Right after graduação ☐

1 year after graduação ☐

2-3 years after graduação ☐

4-5 years after graduação ☐

+5 years after graduação ☐

(5) Why do you study at university?

Please indicate to what degree you agree with the following reasons

	Strongly disagree	Mildly disagree	Neither agree nor disagree	Mildly agree	Strongly agree
To improve my career opportunities	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
To become a researcher of professor	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
To stay informed and to keep learning	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
To pause and reflect on what I want in life	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
Because my family would like me to	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐

(6) Have you ever studied abroad at a university / Do you consider studying abroad at uni?

Yes ☐   No ☐

(7) What factors are important for a great university for <u>studies abroad</u> in your opinion?

(only if yes to #6)

	Unimportant	Of little importance	Moderately important	Important	Very important
That the program is of top quality	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That classes are in English (as opposed to local language)	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That there are few students in the classes	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the university has a high ranking in my field	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That teachers and co-students are pleasant to be around	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the university building and class rooms are nice	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the university has a good library	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the degree can be used back in Brazil	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the university collaborates tightly with companies	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the university promotes student life on and off campus	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the university can give financial support (scholarships)	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the university is international	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the university has students from all over the world	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the university makes students think critical towards theories	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
That the university is in a country I want to experience	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐

(8) Why did you / do you want to study abroad?

(only if yes to #6)

	Strongly disagree	Mildly disagree	Neither agree nor disagree	Mildly agree	Strongly agree
To improve my career opportunities	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
To improve my quality of life	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
To receive a better education than I can in Brazil	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
To get a new perspective on my field of study	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
To learn new languages and cultures	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
To travel and to have fun	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐

(9) What are the main barriers for you to study abroad / Why don't you want to study abroad?

"Strongly disagree" means that the reason is not a big barrier for you to study abroad, while "strongly agree" means that the reason is a big barrier for you to study abroad

	Strongly disagree	Mildly disagree	Neither agree nor disagree	Mildly agree	Strongly agree
I do not feel secure about studying in a foreign language (e.g. English)	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
I am not used to traveling	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
I feel comfortable in Brazil and don't want to leave my life here	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
I don't really know what opportunities I have abroad	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
I am afraid that studying abroad would make me lose my professional network in Brazil	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
I don't like to leave my friends and family for so long	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
It is too expensive	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐

(10) List your top 3 of countries where you would like to study

1) _____

2) _____

3) _____

(11) Have you ever been to Denmark?

Yes (studies) ☐   Yes (vacation) ☐   Yes (other reason) ☐   No ☐

(12) To what degree do you associate Denmark with the following statements?

"Very small degree" means that the statement does not fit your perception of Denmark at all, and "very large degree" means that the statement fits your perception of Denmark perfectly

	Very small degree	Small degree	I don't know	Large degree	Very large degree
The winters in Denmark are mild	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
The summers in Denmark are sunny	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
It is easy to travel from Denmark to all other European countries	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
Denmark is a safe country	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
Denmark is a clean country	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
Denmark is a green (sustainable) country	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
Denmark is an expensive country	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
The Danish people are cold (closed)	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
I will need to learn Danish to feel comfortable living there	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
Quality of life is high in Denmark	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
People have a lot of free time in Denmark	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
I would like to live in Denmark	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐

(13) To what degree do you associate Danish universities with the following:

	Very small degree	Small degree	Don't know	Large degree	Very large degree
Danish universities are world-class	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
Lectures at Danish universities are interactive	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
Students at Danish universities can freely argue with professors	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
Danish universities have great libraries	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐
Danish students are highly engaged in the lectures and ask many questions	(1) ☐	(2) ☐	(3) ☐	(4) ☐	(5) ☐

(14) Have you ever considered studying in Denmark?

Yes ☐   No ☐

Demographic information

(15) What is your gender?

Female ☐   Male ☐

(16) How old are you?

_____

(17) What city are you from?

_____

(18) What is your nationality? (do you have more nationalities?)

_____

Thank you for your time – if you want to participate in the competition for cinema tickets [or the like] please enter your e-mail address below:

_____

Appendix 7 – Danish Population's Attitude Towards Foreigners (WEF report)

The illustration below shows how Denmark is ranked in the World Economic Forum's (2013) report on travel and tourism competitiveness. The report has assessed 140 countries on 14 pillars that are considered important for a country's ability to attract tourists to the country.
Denmark ranks 117 (/140) on how receptive the population is towards foreign visitors (cf. 12.02)

Denmark

The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK
1st pillar: Policy rules and regulations	**5.0**	**27**
1.01 Prevalence of foreign ownership	5.2	39
1.02 Property rights	5.5	23
1.03 Business impact of rules on FDI	4.7	64
1.04 Visa requirements, no. of countries*	71.0	58
1.05 Openness bilateral ASAs (0–38)*	15.7	26
1.06 Transparency of government policymaking	4.7	44
1.07 No. of days to start a business*	6	16
1.08 Cost to start a business, % GNI/capita*	0.2	2
1.09 GATS commitment restrictiveness (0–100)*	53.1	68
2nd pillar: Environmental sustainability	**5.8**	**5**
2.01 Stringency of environmental regulation	6.1	5
2.02 Enforcement of environmental regulation	6.1	4
2.03 Sustainability of T&T industry development	4.4	71
2.04 Carbon dioxide emission, million tons/capita*	8.4	110
2.05 Particulate matter concentration, μg/m³*	15.7	22
2.06 Threatened species, %*	1.7	5
2.07 Environm. treaty ratification (0–25)*	24	1
3rd pillar: Safety and security	**5.6**	**28**
3.01 Business costs of crime and violence	5.2	53
3.02 Reliability of police services	6.2	7
3.03 Road traffic accidents/100,000 pop.*	n/a	n/a
3.04 Business costs of terrorism	5.5	76
4th pillar: Health and hygiene	**6.0**	**36**
4.01 Physician density/1,000 pop.*	3.4	23
4.02 Access to improved sanitation, % pop.*	100.0	1
4.03 Access to improved drinking water, % pop.*	100.0	1
4.04 Hospital beds/10,000 pop.*	35.0	50
5th pillar: Prioritization of Travel & Tourism	**4.1**	**92**
5.01 Government prioritization of the T&T industry	4.6	108
5.02 T&T gov't expenditure, % gov't budget*	2.5	94
5.03 Effectiveness of marketing to attract tourists	4.2	86
5.04 Comprehensiveness of T&T data (0–120)*	72.0	48
5.05 Timeliness of T&T data (0–18)*	15.5	48
6th pillar: Air transport infrastructure	**4.5**	**28**
6.01 Quality of air transport infrastructure	6.0	19
6.02 Airline seat kms/week, dom., millions*	18.2	44

INDICATOR	SCORE	RANK
8th pillar: Tourism infrastructure	**5.6**	**25**
8.01 Hotel rooms/100 pop.*	0.8	42
8.02 Presence of major car rental co. (1–7)*	7	1
8.03 ATMs accepting Visa cards/million pop.*	607.5	25
9th pillar: ICT infrastructure	**5.6**	**4**
9.01 ICT use for B-to-B transactions	5.8	22
9.02 ICT use for B-to-C transactions	5.5	20
9.03 Individuals using the Internet, %*	90.0	6
9.04 Fixed telephone lines/100 pop.*	45.1	20
9.05 Broadband Internet subscribers/100 pop.*	37.6	3
9.06 Mobile telephone subscriptions/100 pop.*	128.5	32
9.07 Mobile broadband subscriptions/100 pop.*	80.2	6
10th pillar: Price competitiveness in T&T ind	**3.3**	**135**
10.01 Ticket taxes and airport charges (0–100)*	82.0	57
10.02 Purchasing power parity*	1.5	136
10.04 Fuel price, US$ cents/liter*	179.0	134
10.03 Extent and effect of taxation	2.6	129
10.05 Hotel price index, US$*	131.9	63
11th pillar: Human resources	**5.7**	**10**
Education and training	5.7	15
11.01 Primary education enrollment, net %*	95.5	50
11.02 Secondary education enrollment, gross %*	117.4	7
11.03 Quality of the educational system	5.0	19
11.04 Local availability specialized research & training	5.3	19
11.05 Extent of staff training	5.1	10
Availability of qualified labor	5.7	10
11.06 Hiring and firing practices	5.3	5
11.07 Ease of hiring foreign labor	4.1	81
11.08 HIV prevalence, % adult pop.*	0.2	52
11.09 Business impact of HIV/AIDS	6.6	3
11.10 Life expectancy, years*	79.1	30
12th pillar: Affinity for Travel & Tourism	**4.5**	**79**
12.01 Tourism openness, % of GDP*	4.8	65
12.02 Attitude of population toward foreign visitors	5.7	117
12.03 Extension of business trips recommended	4.5	124
12.04 Degree of customer orientation	5.6	8
13th pillar: Natural resources	**3.5**	**72**