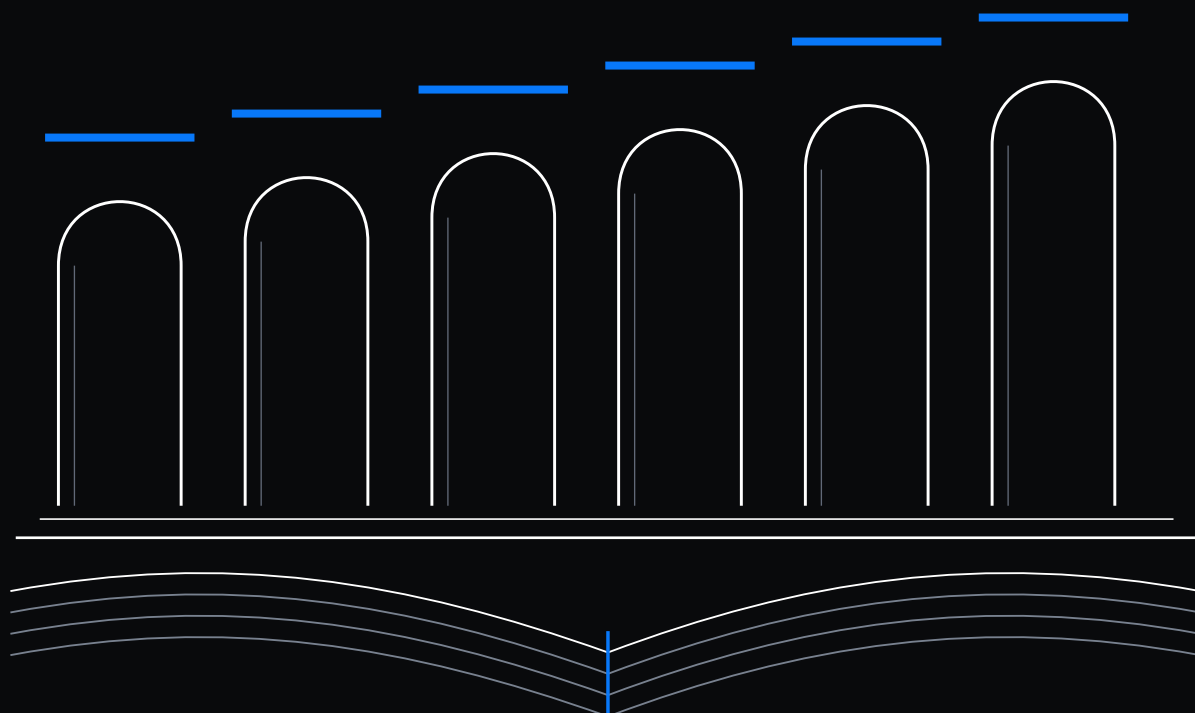


The Institutional Brand Dividend

How sustained brand and creative investment compounds value for universities and colleges



SCHOLARSHIP. REPUTATION. LONG-TERM VALUE.

Joshua Singh Kanwar

Global CEO & Strategy Principal, Wunderbridge

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Executive position

Brand is not the campaign around the institution. It is the meaning the institution earns over time.

57.1% Estimated average tuition discount rate for first-time, full-time undergraduates at 258 US private nonprofit institutions in 2025-26. [2]	42% US adults expressing high confidence in higher education in 2025, up from 36% but below 57% in 2015. [4]	\$78.8bn Estimated giving to US colleges and universities in FY2025; 81% was designated for specific uses. [5]
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The proposition

A university brand compounds when a clear institutional promise is repeated, evidenced and experienced across years. The return is not confined to recruitment. It can strengthen preference, reduce reliance on short-term persuasion, support fundraising, attract partners and talent, and help an institution retain trust during change.

That compounding effect is not automatic. Creative distinctiveness without academic substance is theatre. Academic substance without recognisable meaning is under-valued. The strategic task is to connect mission, offer, experience and evidence in a system that people can remember and believe.

This report proposes a long-term investment model and measurement architecture. It is an evidence-led strategic synthesis, not a claim that branding alone causes enrolment or financial performance.

The market is not simply crowded. It is structurally unforgiving.

Institutions are competing for attention, confidence and participation across more audiences at once.

Spring 2026 US postsecondary enrolment reached 18.6 million, up 1.0% year on year, but performance varied sharply by sector and programme. Private nonprofit four-year enrolment was essentially flat, while undergraduate certificates grew fastest. [1] The strategic implication is not universal contraction. It is uneven demand, requiring institutions to be clearer about where they create distinctive value.

International recruitment adds scale and volatility. US institutions hosted 1.18 million international students in 2024-25, but new international enrolment fell 7%; a fall 2025 snapshot later reported a 17% decline in new international students among participating institutions. [6] Brand cannot remove policy or mobility risk, but it can improve how an institution is recognised, trusted and chosen across borders.

India presents the opposite challenge of scale. The Ministry of Education reported 1,213 universities and 46,624 colleges listed for 2022-23, with a higher-education gross enrolment ratio of 29.5. [11] Expansion creates access and opportunity, but also a dense field of institutions competing for faculty, students, partnerships and public legitimacy.

In the US private nonprofit sector, tuition discounting illustrates the cost of weak or undifferentiated demand. NACUBO's 2025 study estimated that institutions awarded roughly 57 cents in grant aid for every dollar of published tuition and fees for first-time undergraduates in 2025-26. [2] Financial aid serves access and mission; the risk is using price as the default substitute for distinctive value.

When every institution claims excellence, innovation, belonging and outcomes, the category becomes fluent but forgettable.

Brand strategy should therefore answer a harder question: what should this institution become known for, among whom, and what must be true in the lived experience for that meaning to endure?

Institutional meaning, made coherent.

A useful brand is not a logo, campaign line or admissions toolkit. It is a shared system of meaning.

Identity	Reputation	Creative system	Experience
What the institution chooses to stand for and how it defines its role.	What stakeholders believe, based on evidence and accumulated experience.	How the meaning becomes distinctive, recognisable and usable across touchpoints.	Where the promise is confirmed or contradicted in teaching, service and community.

Research supports the need for this wider view. A 2023 systematic review of 43 university-brand studies found recurring attention to brand identity, positioning, students, staff and institutional management rather than promotion alone. [7] Studies in different markets have linked brand equity and service quality with reputation and intention to choose, while also acknowledging that university choice is multifactorial. [8]

This distinction matters because a campaign can create awareness without creating preference; a visual identity can create consistency without creating trust; and a strong reputation can be weakened by an experience that fails to deliver.

The correct unit of design is the institution itself.

That does not mean communications should control academics or operations. It means leaders should define a small number of durable institutional commitments, then give faculties, admissions, advancement, student services and external relations a common strategic language for expressing and fulfilling them.

The result is disciplined plurality: one institution with many legitimate voices, not one slogan imposed on every school.

Six dividends from one institutional asset.

The case for sustained investment is strongest when brand is managed across the whole value system.

01	Preference	More qualified consideration, better fit and stronger yield among priority audiences.
02	Price confidence	A clearer account of value that complements aid strategy and reduces dependence on undirected discounting.
03	Participation	Greater student, staff and alumni identification with a mission they can recognise and enact.
04	Philanthropy	A coherent case for support, connecting donor intent to visible institutional priorities and proof.
05	Partnership	A more legible proposition for employers, governments, researchers and international collaborators.
06	Resilience	A stock of earned meaning that helps stakeholders interpret change, challenge and crisis.

The six dividends interact. Brand image has been associated with alumni positive word-of-mouth directly and through satisfaction and identification in a study of 1,000 alumni. [9] Separate research with 791 alumni found that recalled academic and social experiences influenced identification, which predicted loyalty and support. [10] These studies do not prove a universal financial multiplier, but they show why the institution's value cannot be reduced to the next admissions cycle.

CASE estimated \$78.8 billion in US higher-education giving in FY2025, with 81% designated for specific uses. [5] The strategic lesson is that broad affection and specific proof must work together: donors support an institution, but increasingly direct funds towards outcomes they can understand.

The institutional brand compounding loop.

Value grows when meaning survives repeated contact and becomes easier to retrieve, trust and advocate.

01	Meaning	A distinctive role, expressed in language stakeholders can understand.
02	Memory	Consistent creative assets make that meaning easier to recognise and recall.
03	Proof	Outcomes, research, student experience and external evidence make the promise credible.
04	Preference	The institution becomes a more confident choice at a consequential decision point.
05	Participation	Students, faculty, alumni and partners reinforce the meaning through behaviour.
06	Advocacy	Trusted voices extend reach and return new evidence to the institution.

Time is the multiplier. A distinctive platform used for seven years can accumulate recognition, shared language, stories and proof. A platform replaced every 18 months repeatedly pays the cost of explanation while discarding memory.

Consistency does not mean repetition without change. The enduring elements should be stable enough to become recognisable; the creative expression should remain alive enough to reflect new research, new programmes and changing culture.

The investment case is therefore less like media efficiency and more like institutional infrastructure: build once, improve continuously, distribute widely, measure over time.

This loop is an author-developed strategic model. Institutions should test its relationships against their own audiences and financial structure.

Make the institution memorable without making it shallow.

The strongest higher-education creativity turns real academic character into distinctive public meaning.

A 2025 Carnegie survey of more than 3,400 prospective students and parents found that college websites were the leading information source among graduating seniors at 64%, followed by general search at 49% and family at 45%. [3] The result is a reminder that owned experience, discoverability and human influence operate together.

Creative strategy should work across five surfaces:

Promise	What distinctive future, contribution or transformation the institution makes possible.
Programme	How courses, research and pedagogy embody the promise rather than merely carry its name.
Place	How campus, digital services and community make the institution recognisably itself.
People	How faculty, students, staff and alumni speak with credibility in their own voices.
Proof	How outcomes, methods, partnerships and limitations substantiate the story.

The creative system should be designed for thousands of legitimate uses, not only the launch film. Admissions needs clarity. Research needs authority. Student life needs energy. Advancement needs emotional continuity. Employer partnerships need relevance. A mature system can hold all five without collapsing into visual sameness.

Good branding does not make every university look premium. It makes each university more recognisably itself.

Fund a capability, not a launch event.

Long-term value requires governance, evidence and creative stewardship after the rebrand is finished.

The common failure is to concentrate investment in discovery and launch, then underfund the years in which meaning is supposed to compound. The identity fragments, faculties improvise, evidence goes stale and the next leadership team concludes that another rebrand is required.

A durable investment architecture

20%	Definition	Audience research, institutional truth, portfolio logic and strategic choices.
25%	System	Verbal and visual identity, templates, digital patterns, accessibility and governance.
35%	Expression	Original stories, research, creative platforms and priority audience journeys.
20%	Stewardship	Training, measurement, refresh, evidence management and internal adoption.

These percentages are a planning heuristic, not a benchmark. Institutions with weak digital infrastructure may need to invest more in systems; institutions with strong systems but indistinct public meaning may need more original expression.

Governance should be federated. A central brand office owns the strategic platform, evidence rules and core assets. Schools and units receive enough freedom to express genuine academic difference within that architecture. Senior leadership resolves conflicts between short-term recruitment pressure and long-term institutional meaning.

Internal adoption is not a communications exercise. Research on university rebranding has identified support from deans and middle managers as important to internal branding. [7] If the people delivering the experience do not understand the promise, external consistency will be cosmetic.

Measure the value chain, not the volume of activity.

A credible brand dashboard links leading indicators to institutional outcomes without pretending that correlation is causation.

Layer	Signals	Decision
Meaning	Awareness, associations, distinctiveness, message comprehension	Is the intended position entering memory?
Demand	Qualified enquiries, application mix, yield, search demand, direct traffic	Are priority audiences choosing to know more?
Experience	Retention, belonging, service quality, recommendation, complaint themes	Is the promise being experienced?
Advancement	Alumni engagement modes, donor renewal, unrestricted/designated mix	Is affinity becoming participation?
Institution	Net tuition revenue, talent, partnerships, research opportunity, resilience	Is the institution gaining durable options?

CASE's brand and reputation metrics framework similarly spans brand development, recruitment and retention, strategic communications, alumni engagement, philanthropy and external engagement. [12] This breadth reflects the institutional nature of the asset.

Four safeguards

1. Establish baselines before major change. 2. Segment by audience and market. 3. Use comparable definitions across years. 4. Pair behavioural data with qualitative evidence explaining why the change occurred.

Do not collapse the system into one synthetic score unless it has been tested against decisions that matter. A single number is easy to present and easy to misunderstand.

The board should see whether institutional meaning is strengthening, whether experience supports it and where financial or reputational outcomes are plausibly connected.

A five-year institutional brand programme.

Sequence the work so that recognition, evidence and capability accumulate instead of resetting.

Year 01	Choose and build	Define the position, resolve portfolio confusion, create the identity system, baseline perception and fix priority journeys.
Year 02	Prove and distribute	Publish flagship evidence, equip faculties, redesign admissions and advancement content, build distinctive memory.
Year 03	Embed and extend	Connect experience standards, partnerships, research communications and international markets to the platform.
Year 04	Optimise and deepen	Use longitudinal evidence to improve audience journeys, programme narratives and creative effectiveness.
Year 05	Renew without resetting	Refresh expression, retain recognisable assets, review strategic relevance and recommit resources.

The model should not force every institution into the same spend curve. A regional college with limited resources may focus on one high-value audience journey and a small number of distinctive assets. A global university may need a federated system operating across schools, languages and countries.

The principle remains: protect the investments that build memory and proof. Do not allow annual campaign planning to consume the budget required for research, experience improvement, capability and measurement.

Every year should add an asset the next year can use.

Examples include a recognised creative property, an evidence-rich outcomes platform, a distinctive institutional event, a faculty storytelling network, an alumni advocacy programme or a research series with genuine authority.

Conclusion

Build an institution people can recognise, believe and join.

The financial return from brand is rarely a clean line. The institutional return can still be profound.

Universities and colleges operate through long relationships: years of study, decades of alumni identity, research partnerships, public trust and philanthropic commitment. A short-term communications model is poorly matched to that reality.

Sustained brand and creative investment can create outsized value because the same asset influences multiple decisions over time. A clear promise can help a student recognise fit, a faculty member understand ambition, an employer see relevance, an alumnus sustain identification and a donor understand what their support can make possible.

But the return depends on truth. Leaders must align the story with academic quality, student experience, research, service and governance. Creative strategy makes the institution easier to remember; it cannot compensate indefinitely for an institution that does not deliver.

Five questions for university leadership

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| 01 | What should we be known for that a credible peer cannot claim in the same way? |
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| 02 | Which parts of the student and alumni experience prove that promise? |
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| 03 | Which recognisable assets are we willing to protect for five years? |
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| 04 | Where are we using price, media or rankings to compensate for weak meaning? |
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| 05 | What evidence will tell us that institutional preference and participation are compounding? |
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The institution that invests patiently in meaning, memory, proof and experience does more than improve marketing. It increases the number of futures in which people choose to participate.

Research transparency

Sources & method

This publication is an attributed synthesis of public sector data, institutional research and peer-reviewed scholarship, combined with original strategic interpretation by Joshua Singh Kanwar. It is not a primary empirical study. Findings from specific countries, institutions and samples are not presented as universal causal estimates.

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About the author

Joshua Singh Kanwar writes on strategy, creative leadership, technology and durable institutional value. Published by Wunderbridge, an independent global brand accelerator.