

An insight report
for leaders in higher education



The University Brand Difference

Why brand must do more than
communicate distinction.
It must help create it.

rbl & Tracksuit

rbl brand agency
brands that move you

A report in five moves.

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About the author

rbl is a strategic brand agency helping Universities move forward together. From the fourth oldest university in the English-speaking world to a completely new university operating a completely new model, rbl has partnered with over 15 universities to solve complex brand challenges. The learnings from each project have helped inform this report.

Brand has been given too small a job.

For more than a decade, rbl has worked with universities at moments when the old story no longer matched the institution, the market or the ambition. Across complete rebrands, strategy transformations and long-term partnerships, the same pattern keeps returning.

Brand is still treated mainly as a way to communicate difference. In a converging market, that is not enough. Communication can sharpen a claim. It cannot make a generic experience distinctive.

OUR HYPOTHESIS

The most valuable university brands do not simply describe differentiation. They direct it, shaping the environment, culture and experience through which an institution becomes known.

That changes the question from “What should we say?” to “What should people consistently experience here?” and “What must we organise differently to make it true?”





Evidence from inside the category.

This report combines category intelligence with rbl's primary research and strategic work across UK higher education. It draws on thousands of student responses, hundreds of conversations with academics and professional services teams, and detailed analysis undertaken during live university brand programmes.

- **A survey of more than 750 high-performing prospective UK students on application decision drivers.**
- **Comparative brand testing across more than 20 institutions, including established, research-intensive and post-92 universities.**
- **Qualitative interviews, workshops, focus groups and student testing across multiple university projects.**
- **Current sector context from the Office for Students, UCAS and HESA.**

Tracksuit

Supported by intelligence at scale.

Tracksuit delivers beautiful, radically affordable, always-on brand tracking. They've democratized brand health measurement with enterprise-level robustness at a fraction of the cost, and make it easy to measure and communicate the value of brand, prove its impact and secure buy-in for continued investment.

By speaking to real humans every day to understand what they think and feel about brand, Tracksuit have tracked the brands of a cross section of the university sector, combining thousands of responses to provide:

- **Category intelligence covering awareness, consideration, preference, associations and conversion drivers.**

All institution-level findings have been anonymised or grouped. Percentages are retained only where they support a category-level conclusion.



Sameness is not a design problem. It is a strategic risk.

Propensity to apply among target



In one recent study, university brands generated a propensity to apply among just 8% of their potential audience.

Across a wider group of 18 institutions, only 10% to 30% of students associated the brands with appealing qualities. The institutions were different. The impressions were not different enough.

Tracksuit's category view reaches the same conclusion from another angle. Employability is strongly associated with every university in the comparison set, making it table stakes. Perceptions are tightly clustered across most attributes. Value for tuition fees is lower and less convincingly owned.

THE IMPLICATION

When every institution communicates the same strengths, students fall back on entry requirements, course, location and rankings. Brand has failed to widen the decision.



What the evidence tells us.

Familiar claims are losing power.

Prestige, employability and heritage can reassure, but are rarely distinctive when every competitor reaches for them.

The decision is more human than the category behaves.

Beyond fixed criteria, students respond to support, community, experience and a credible sense that they will belong and progress.

Brand creates value when it changes delivery.

The brand must guide choices about place, behaviours and experience. Otherwise it remains a campaign applied to institutional sameness.

01

The market is converging

Why competition is pulling university brands towards the same safe centre.

01

The market is converging

More competition. Less room for imitation.

The Office for Students describes a third consecutive annual decline in sector finances. Recruitment has been broadly flat, costs have risen and international recruitment has disappointed against forecast. Providers have responded by competing harder for UK students.

0.3% growth in UK student recruitment in 2023/24
167 providers could be in deficit by 2027/28
in the OfS no-growth scenario.

This pressure creates a predictable response: reduce risk, follow category conventions and say what feels defensible. But when many institutions make the same move, the category becomes safer and less memorable at precisely the moment it needs to become more compelling.

THE COMMERCIAL REALITY

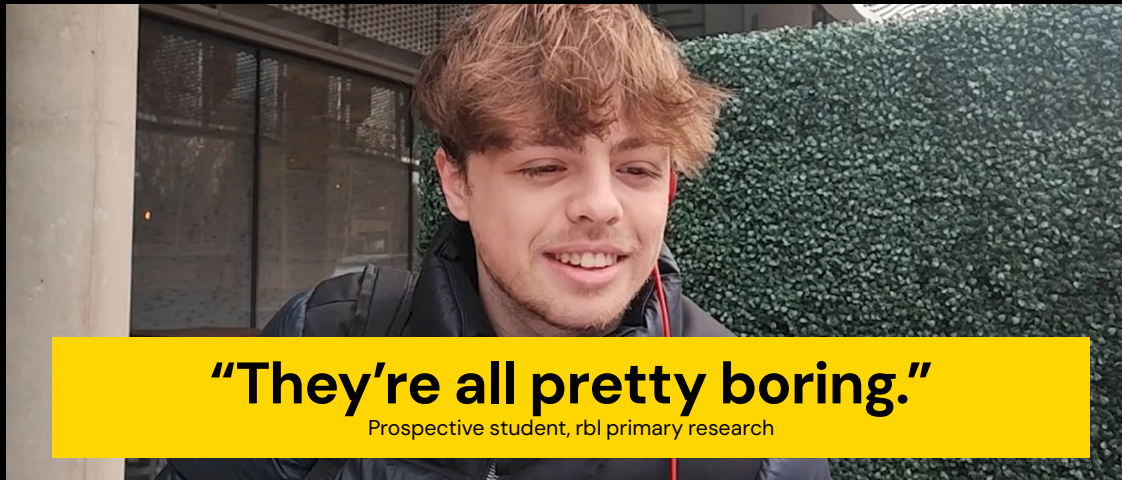
Student recruitment is no longer simply a marketing objective.
It is becoming a question of institutional resilience.

01

The market is converging

Safety is creating a crowded centre.

Across the category, institutions repeatedly draw from the same vocabulary: world-class teaching, employability, impact, inclusion, transformation, heritage and place. Many of these claims are true. Few are owned.



"They're all pretty boring."

Prospective student, rbl primary research

THE STRATEGIC DANGER

If an institution looks and sounds like its peers, it will be compared on the factors that are easiest to measure and hardest to change.

The line came from a high-achieving prospective student looking at a collection of prestigious university brands. It is blunt, but useful. A sector can be full of exceptional organisations and still produce an undifferentiated market.

01

The market is converging

Crests. Change. Premium. Repeat.

The visual and verbal codes of higher education are converging. Established institutions lean on heritage as a shortcut to prestige. Newer institutions reach for the visual language of premium modernity. Almost everyone promises transformation.

These signals can still play a role. Heritage can create confidence. Modernity can suggest relevance. Transformation can express ambition. The error is mistaking a category cue for a competitive position.

Universities need enough fluency in the category to be recognised, and enough character to be remembered. Too much of the first produces blandness. Too much of the second, without institutional truth, produces theatre.

A USEFUL DISTINCTION

A cue tells people what kind of organisation you are.

A brand gives them a reason to choose this one.



02

The familiar signals are fading

What prospective students notice, and what they no longer use to decide.

CENTRAL COLLEGE OF COMMERCE

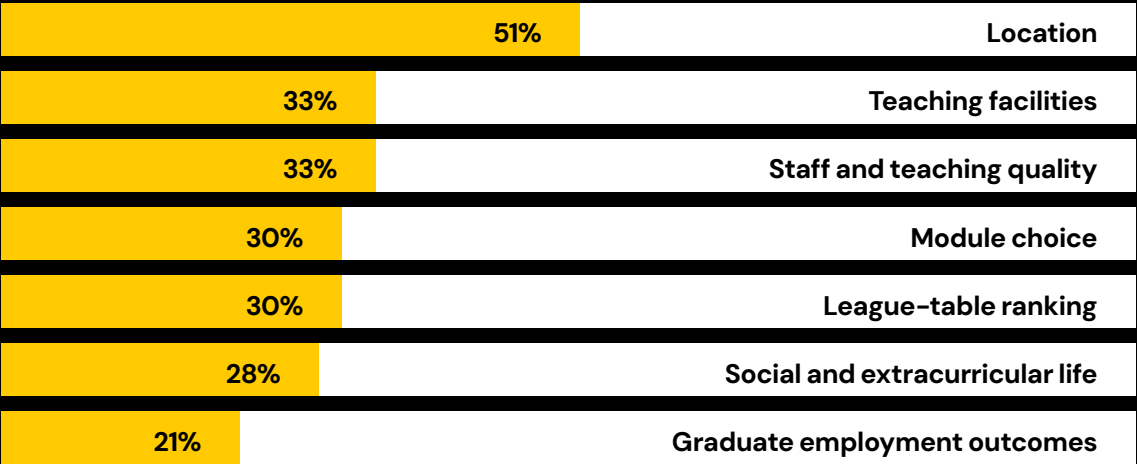
02

The familiar signals are fading

Students start with the practical.

In rbl research with more than 750 high-performing prospective UK students, the leading decision drivers were entry requirements, course content and location. Reputation followed. Heritage, history and exclusivity did not emerge as primary drivers.

UCAS research with thousands of applicants entering higher education in 2025 independently supports the pattern found in rbl's research. Applicants placed practical fit, the learning experience and course detail ahead of reputation signals alone.



TWO STUDIES. ONE PATTERN.

Students begin with practical and academic fit. Reputation matters, but it does not replace relevance.

02

The familiar signals are fading

Some factors are fixed. Perception is not.

Entry requirements, geography and league-table position matter. They are also difficult to change quickly. When brand does little more than repeat those facts, it leaves the decision exactly where the institution has least room to manoeuvre.

Course experience, teaching, support, community and the value students expect to receive are different. They can be designed, evidenced and improved. Brand can make these choices coherent, then make their meaning visible.

THE OPPORTUNITY

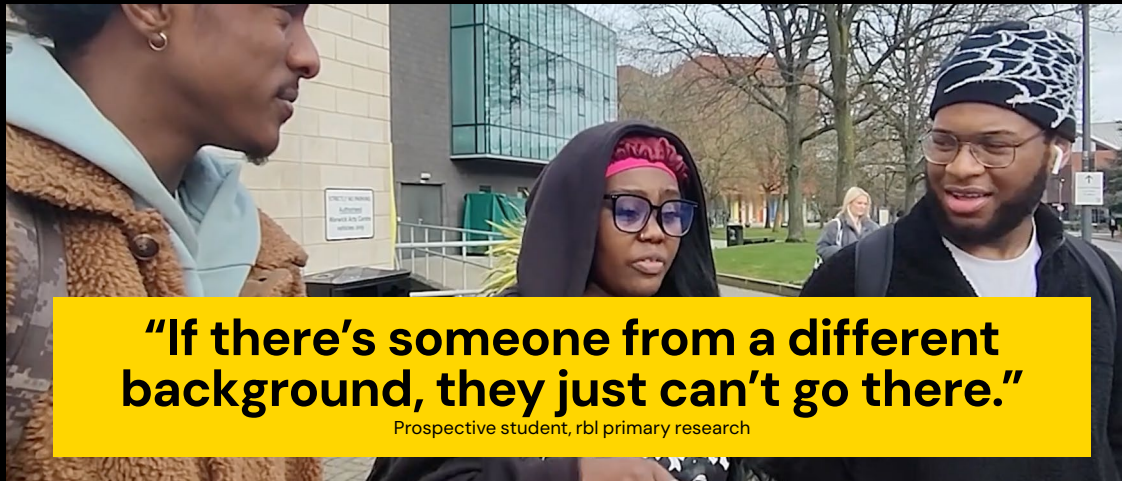
Shift the decision from inherited advantage to experienced advantage.

This is not an argument for hiding rankings, heritage or location. It is an argument for putting them in service of a more distinctive promise, rather than asking them to carry the entire brand.

02

The familiar signals are fading

Prestige still matters. But its meaning is changing.



For some students, the codes intended to signal excellence can also signal exclusion. The challenge is not to abandon quality, ambition or selectivity. It is to express them in a way that feels relevant to a broader, more contemporary audience.

Modern prestige is less about distance and deference. It is the confidence that excellent people, excellent teaching and serious opportunity will help a student become more capable, more connected and more themselves.

THE PURPOSE OF PRESTIGE

What does prestige enable here, and who is invited to benefit from it?

02

The familiar signals are fading

Tracksuit

Trust moves people from awareness to consideration.

2.4x

People who associate a university with trust are 2.4 times more likely to move from awareness to consideration.

BRAND'S REAL JOB

Reduce the distance between institutional promise and lived proof.

Tracksuit's analysis identifies trust as the strongest conversion association in the category. Excellent teaching standards and value for tuition fees also contribute positively.

This matters because trust is not created by a line in a campaign. It is accumulated through clarity, consistency and proof: what a university promises, how it behaves, what students experience and what others say all need to point in the same direction.

02

The familiar signals are fading

Tracksuit

Trusted universities convert awareness 20% more effectively.

40%

**Awareness-to-consideration conversion
among institutions with above-median trust associations.**

33%

**Awareness-to-consideration conversion
among the rest of the sample.**

WHY IT MATTERS

Awareness has greater commercial value when the institution is trusted. Brand does not simply make a university better known. It can make being known more productive.

Across the five distinct institutions with complete data, stronger trust is associated with a 6.8 percentage-point conversion advantage. Put another way, the more trusted group converts awareness into consideration approximately 20% more effectively.

02

The familiar signals are fading

Tracksuit

Value is the category's uncomfortable whitespace.

- 32%** average association with “provides great value for tuition fees”.
- 100%** of institutions tested score value as their weakest tested brand association.
- 13pts** separate average perceptions of value (32%) and excellent teaching (45%).
- 6%** separates the strongest and weakest institution on value, showing how tightly the category clusters.

Value is therefore both an issue and an opportunity. It should not be reduced to price. In higher education, value is the total return on a student's investment of money, time, identity and possibility. The institution that can make this return tangible has room to create a position the category does not yet convincingly own.

THE PROVOCATION

If value cannot be felt in the experience, it cannot be fixed in the communications.

03

Brand is an operating idea

How environment, culture and experience turn a promise into proof.

Welcome to the Creative, the Curious and the Courageous.

Welcome to those who see the world differently
and want to make it better.

Welcome to new ideas that take root and grow,
and to experiences that shape the future.

Welcome to a community that lifts you,
challenges you and walks beside you.

Welcome to Norwich – exciting, inspiring
and alive with possibility.

Welcome to UEA.

Original
By Nature

UEA University of
East Anglia
Norwich

03

Brand is an operating idea

A brand should leave fingerprints.

The quickest way to understand whether a university has a real brand is to look beyond its prospectus. Can you see the same belief shaping the campus, the welcome, the teaching, the support model, the employer experience and the way colleagues make decisions?

If the answer is no, the institution may have an identity system and a messaging framework. It does not yet have a brand operating across the organisation.

THE TEST

Could a student recognise the promise without seeing the logo?

Distinctive brands create patterns. Small, repeatable choices accumulate into a recognisable kind of place. That is how an abstract promise becomes an institutional advantage.

03

Brand is an operating idea

Environment. Culture. Experience.

ENVIRONMENT

The physical and digital signals that tell people where they are, what matters here and how they are expected to take part.

CULTURE

The behaviours, rituals and decisions that turn institutional values into a shared way of working.

EXPERIENCE

The moments that students, staff and partners remember, from first enquiry to graduation and beyond.

These levers can move more quickly than a league table or a campus location.
They are also harder for a competitor to copy because they are produced by the institution itself.

Place is not a backdrop. It is evidence.

Every campus communicates before a member of staff says a word. Entrances, signage, social spaces, libraries, labs, accommodation and digital services all signal who belongs, how seriously learning is taken and whether the institution understands contemporary student life.

The strongest university environments do not merely display the identity. They stage the promise. A brand built around experimentation should make it easier to experiment. A brand built around community should create places and platforms where connection happens naturally.

LEADERSHIP QUESTION

Where does our environment prove the promise, and where does it quietly contradict it?

03

Brand is an operating idea

Colleagues do not deliver a brand they cannot use.

University brands often become fragmented because ownership is mistaken for control. Central teams protect consistency. Faculties and services protect relevance. Both are reasonable. Neither works without a shared belief strong enough to guide local decisions.

Research across university projects repeatedly found fatigue with superficial change, alongside a genuine appetite for a clearer story. People did not need more slogans. They needed a practical answer to three questions: what do we believe, what does it ask of me, and how will I know I am doing it well?

THE CULTURAL SHIFT

Move from brand compliance to brand participation.

03

Brand is an operating idea

Support is not a service line. It can be a position.

In one post-92 institution, research found that personalised support, close community and a belief in students' potential ran through the strongest internal and external stories. "Friendly" was not the strategy. It was the surface expression of something more valuable: an institution organised to notice people and help them progress.

In another research-intensive institution, student experience was the weakest area against competitors but also the area with the most room for brand to influence. The lesson is the same. Experience is not soft evidence. It is where meaning becomes credible.

FROM HYGIENE TO ADVANTAGE

**Name the experience only your culture can deliver,
then design the institution to deliver it repeatedly.**

03

Brand is an operating idea

Brand is no longer what universities say. It's what students experience.



Dawn Vos

A brand leader with experience of working at the highest levels across the universities of Staffordshire, Aston, Birmingham City and more provides her view on the future of brand within the sector.

Every university wants a stronger brand. Many invest heavily in marketing campaigns, yet despite increasing spend, many are finding it harder than ever to differentiate themselves. Why?

Because prospective students are no longer making decisions based primarily on what universities say about themselves. They're making decisions based on whether they trust the experience and the outcomes.

Today's students are asking:

- Will this degree help me build a successful career?
- Will I feel supported and included?
- Is the investment worth the cost?

The universities that will thrive over the next decade won't necessarily be those with the biggest marketing budgets. They will be those that can most credibly answer these questions.

(Continued)



03

Brand is an operating idea

Dawn Vos, Brand Leader



Marketing can amplify credibility, but it cannot create it in isolation. Trust is built when institutional promises are consistently reflected in the student experience and the outcomes graduates achieve. This is why employability has moved from being a graduate destination metric to also becoming a core brand asset.

One of the biggest misconceptions in higher education is that brand is the responsibility of the marketing team alone. It isn't.

Marketing plays a critical role in shaping, stewarding and communicating the brand. We create the proposition, tell the stories and build the connections that help earn trust... but even the strongest brand strategy can only succeed when the experience matches the promise.

When students succeed, brand strengthens. When students thrive, reputation grows. Marketing helps articulate the promise. The whole institution helps deliver it.

For me, this is where the future of university branding lies. Prospective students are becoming increasingly sophisticated consumers. They're looking beyond campaigns, prospectuses and taglines and asking an important question – "What are the outcomes?"

Marketing can shape perceptions, build awareness and tell compelling stories, but it cannot build trust on its own. The most powerful brands are those where the student experience consistently reflects the promise being made.

The challenge for universities is not simply to communicate a stronger brand. It is to create the experiences and outcomes that make that brand believable.

Marketing can tell the story. Trust comes from the evidence. Evidence is created by the whole institution.

That's why reputation is no longer solely built through what institutions say. It's built through what students experience and achieve.



04

Meaning shifts the decision

Why trust, teaching and value create a more useful competitive frame.



04

Meaning shifts the decision

Brand is not the alternative to investment. It directs investment.

In financially pressured institutions, brand can look discretionary. That view persists when brand is defined as campaign, identity or communications. It changes when brand is used to align the choices that already consume time and money.

-
- **Which student experiences receive attention and funding.**
 - **Which behaviours do leaders recognise and reward.**
 - **Which partnerships feel natural and mutually valuable.**
 - **Which parts of the estate and digital journey carry the promise.**
 - **Which proof points are built, measured and repeated.**
-

Brand makes these decisions cumulative. Instead of a collection of good initiatives, the institution creates a recognisable pattern that compounds over time.

04

Meaning shifts the decision

Awareness is only the beginning.



BE KNOWN

Build salience through consistent, distinctive expression.



BE UNDERSTOOD

Frame a clear promise around what matters to the audience.



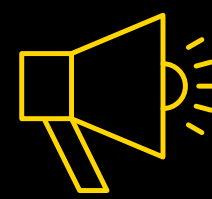
BE TRUSTED

Join message to evidence across teaching, value and experience.



BE CHOSEN

Make the institution feel meaningfully right, not merely acceptable.



BE ADVOCATED

Turn lived experience into reputation, recommendation and pride.

WHY THIS MATTERS

A campaign can lift the first step. Only an operating brand can connect all five.

05

A practical agenda

Five questions for leaders who want brand to create institutional advantage.

05

A practical agenda

Five moves from brand bland to brand value.

01

Diagnose the real decision:

Measure where perception helps or hinders movement from awareness to consideration and choice.

02

Find relative meaning:

Identify the belief that is true internally, relevant externally and uncommon competitively.

03

Design the proof:

Translate the idea into priority changes across environment, culture and experience.

04

Make it usable:

Give leaders, faculties and services principles they can apply without waiting for central permission.

05

Track the effect:

Measure associations and conversion over time, alongside recruitment, experience and reputation signals.

05

A practical agenda

Is your brand creating difference, or decorating sameness?

-
- What decision are we trying to change in the minds of prospective students?
 - Which parts of our current reputation are distinctive, and which are simply category expectations?
 - Where can a student experience our promise before they encounter our communications?
 - What would colleagues do differently if the brand were genuinely guiding the institution?
 - Which association would most improve movement from awareness to consideration?
 - What are we prepared to change in order to make the promise true?
-

THE CLOSING THOUGHT

The universities that win will not be those that say “transform” most convincingly. They will be those that decide what transformation means here, and make it visible in every consequential experience.

Evidence used in this report.

rbl primary research

Cross-project higher education research, 2023–2025, including interviews, workshops, focus groups and surveys. Institution names have been withheld.

Prospective student decision study

Survey of more than 750 high-performing prospective UK students, conducted for a recent university rebrand.

Comparative university brand testing

Testing across 18 UK university brands; category-level findings reproduced in anonymised form.

Tracksuit

UK Higher Education Institutions Category Intelligence. Includes category associations, conversion drivers and demographic /media profiles.

Tracksuit trust conversion analysis

rbl analysis of five distinct institutions with complete awareness, consideration and trust data, August 2025 to July 2026. Above-median trust institutions converted at 39.8%; the rest at 33.1%.

Office for Students

Financial sustainability of higher education providers in England 2025, published 8 May 2025.

UCAS

End of Cycle Survey 2025 results and recommendations, including decision drivers and open-day behaviour.

HEPI and Advance HE

Student Academic Experience Survey 2025, based on more than 10,000 full-time UK undergraduate students.

HESA

Higher Education Student Statistics: UK, 2023/24, released March 2025.



Difference is something you do.

Higher education does not have a shortage of purpose, talent or possibility. It has a shortage of brands capable of bringing those things together in a form people can recognise, trust and choose.

The opportunity is larger than a new identity and more practical than a new slogan. Brand can help an institution decide how it wants to be experienced, organise around that decision and build evidence that compounds.

That is how a university moves from communicating differentiation to creating it.

A QUESTION TO BEGIN THE NEXT CONVERSATION

“What could people only
feel, learn or become here?”

rbl

 rbl-brandagency.com

Tracksuit

 gotracksuit.com