

The State of Higher Ed Branding:

A Survey of Marketing Leaders

by Deborah Maue and Tom Hayes, Ph.D.



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I. The Findings	3
II. The Details	4
III. What Worked Well	14
IV. Frustrations	15
V. What Would You Do Differently?	15

Appendix 1 | Appendix 2

mStoner, Inc. helps clients to tell their authentic stories by clarifying their unique brand value proposition, creating a content strategy to communicate the brand effectively, and implementing compelling and dynamic communications across the web, mobile, social media, print, and other channels. mStoner focuses on research, data, and results. Since 2001, mStoner has worked with more than 300 colleges, universities, and professional schools in the United States and abroad.

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The State of Higher Ed Branding: A Survey of Marketing Leaders, by mStoner, Deborah Maue and Tom Hayes, Ph.D.

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The higher ed industry has come a long way in its understanding and acceptance of branding.

Brand strategy is a hot topic among CEOs, boards of trustees, and higher education marketing leaders. Go to just about any higher education conference, and you'll hear CEOs, provosts, vice presidents, and other leaders talking about brand, brand strategy, and marketing.

Furthermore, conferences aimed at marketing professionals in higher ed attract marketers from around the world. They come to learn from each other and from experts because, despite the growing sophistication of higher ed marketers, there are still plenty of questions about how to approach and implement brand strategy on campus.

For these reasons, we wanted to know more about the state of brand strategy in higher ed, to be able to identify and share best practices to help institutional marketers develop approaches to marketing research, brand strategy, brand implementation, and evaluation.

The goal of this research was to take a more focused look at the degree to which colleges and universities have developed and implemented formal, research-based brand strategies. It investigated, among other things:

- how much money was spent on brand strategy projects
- whether external partners were used, and for what expertise
- who sponsored the project on campus
- how long the process took.

This is the first of a planned annual study of the experience of marketing professionals in leading brand strategy projects on their campuses.

The Findings

Most institutions have conducted brand strategy projects. Three-quarters of respondents to the survey (76 percent) indicated they have done a brand strategy project. Among those, about three-quarters said that the process met or exceeded their expectations. One respondent said, “[The] discovery process led to greater clarity on strengths of the institution; distinctive characteristics were identified and incorporated effectively into [a] comprehensive integrated marketing campaign.”

Twenty-four percent of respondents have not conducted any brand strategy work on their campus. While this number is too small to draw quantitative conclusions, a few common themes emerged. Most respondents who have not done brand strategy work still understand its importance, but cite lack of funding and support as the top reasons as to why it hasn’t been conducted to date. And two-thirds of those who have not yet done formal brand strategy work said they intend to start within the next 18 months. Most expect to spend between \$76,000 and \$100,000 on the effort.

Brand strategy gets support from the top. The brand development process is typically funded and/or championed at the highest levels of the university. Respondents in this study most often reported that the president’s/chancellor’s office was the primary source of funding, followed by the chief marketing officer or vice president of marketing.

Brand strategy is grounded in research. The brand development process is informed by solid marketing research efforts, including both qualitative and quantitative techniques, conducted across a wide range of internal and external constituents: Among respondents who carried out these projects, about three-quarters conducted focus groups with external stakeholders, and about the same proportion conducted quantitative online or phone interviews with external constituents. One respondent noted, “Doing lots of research up front, both qualitative and quantitative, created greater buy-in to what we were doing and gave weight to what we shared and developed, especially with faculty and our board.”

Brand strategy is a campus-wide effort. Brand development is an inclusive process that involves senior leadership, faculty, and staff. Seventy-nine percent of respondents who carried out a project reported that it involved a cross-functional team. One respondent said the process worked well because “presentations

to all constituents along the way built excitement and enthusiasm for the project.”

Brand rollout involves many internal communication channels. Respondents employed a wide range of communication channels to launch the brand initiative. The most common activities were meetings and workshops with internal communications staff and creation of an online or print brand style guide. One respondent reported, “Having the printed brand piece was exceptionally useful and continues to be as new people come on board.”

The process required a significant investment, but it was worth it. Over half of respondents who reported cost data on their projects said their institutions spent more than \$100,000, with 31 percent saying they spent more than \$200,000. Nearly all said that the investment was worth it. One respondent noted that “this work was important in giving the university a clear brand and marketing direction.”

Still, there are frustrations. This is not to say that marketers didn’t cite any difficulties with the ways their institutions approached, implemented, or sustained their brand strategy initiatives. Common frustrations included lack of support during implementation and the assumption that brand strategy and implementation was a project that was completed, rather than a process that requires ongoing funding and support. One person complained that there were “not enough ongoing funds dedicated to the effort. Once we completed the initial campaign, we have not been able to get funding.” Finally, there’s a recognition that it’s difficult to have a successful process without leadership from the president or chancellor. One respondent said, “[A] presidential transition led to elimination of budget for integrated marketing initiative after only one year.”

II.

The Details

GOALS

When we asked respondents to name the primary objective of a brand strategy project, the top two responses were “to increase institutional awareness” (60 percent) and “to achieve enrollment goals” (38 percent).

EXPERIENCE

Most respondents (76 percent) have conducted a formal, research-based brand strategy process.

FIGURE 1

What is the primary objective a higher education brand strategy should accomplish?

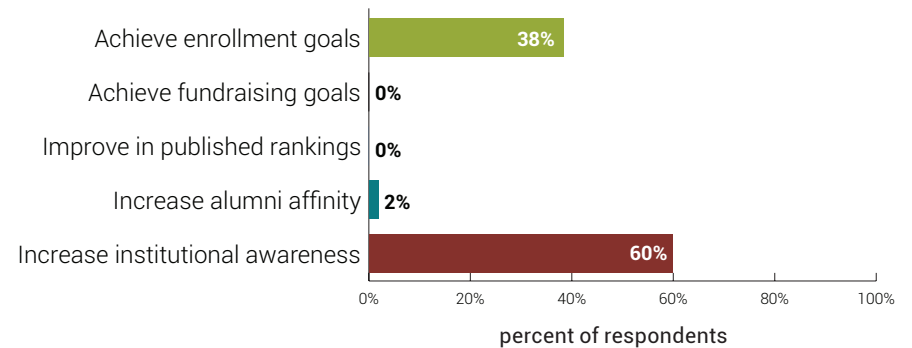
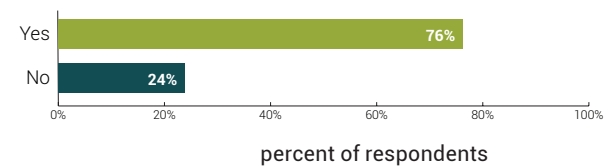


FIGURE 2

Have you conducted a formal research-based approach to creating a brand identity for your college or university?



II.

The Details

TIME

As figure 3 shows, 61 percent of those conducting formal brand strategy initiatives began their work between one and five years ago. Twenty percent initiated it between six and 10 years ago.

The process typically took nine to 15 months. Thirty-three percent of respondents stated that it took between 12 and 15 months, and 32 percent of respondents reported it took between nine and 12 months.

FIGURE 3

When did you begin formal brand strategy work?

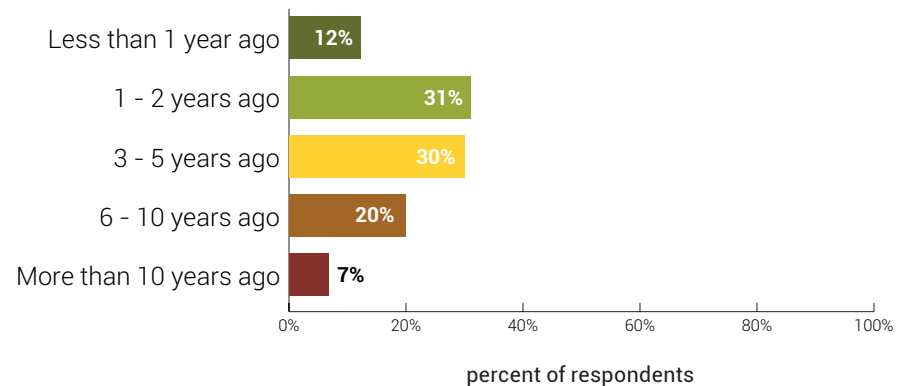
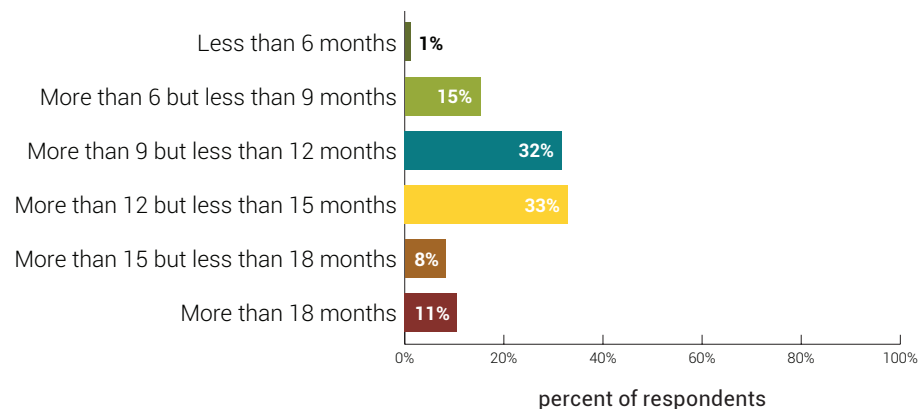


FIGURE 4

How long did the process take from start of research until the brand launch?



II.

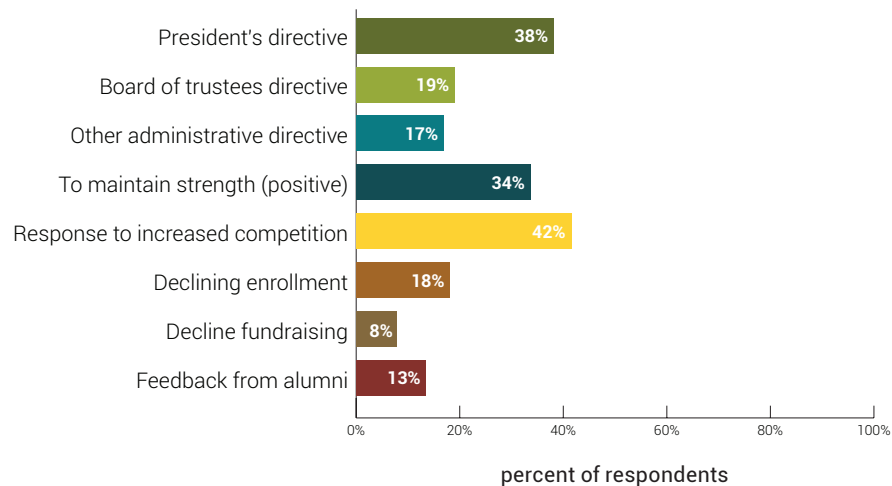
The Details

MOTIVATION

When asked what prompted them to start a brand strategy project, respondents reported a range of motivating factors. Forty-two percent said that the brand initiative was a response to increased competition, 38 percent said that it was a result of the president's directive, and 34 percent said it was to maintain the strength of the institution. Write-in responses cited, in addition to the options provided, an overall increased focus on strategic planning.

FIGURE 5

What prompted you to initiate the brand strategy process?



II.

The Details

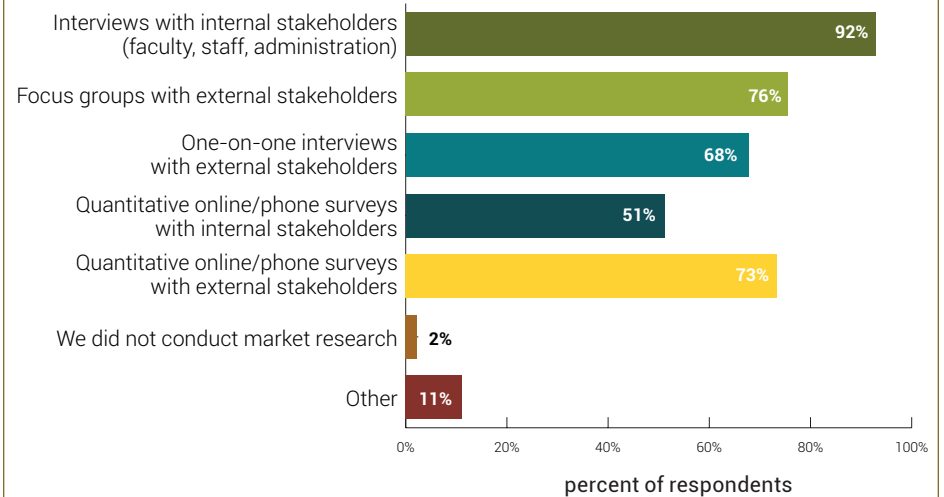
RESEARCH

Figure 6 shows that nearly all respondents included market research as part of the brand strategy process. Only 2 percent of respondents did not use any kind of internal or external research.

- 92 percent conducted interviews with internal stakeholders such as faculty, staff, and administration.
- 76 percent conducted focus groups with external stakeholders.
- 73 percent also conducted quantitative online or phone surveys with external constituents.
- 68 percent conducted one-on-one qualitative interviews with external constituents.
- 51 percent of respondents also used quantitative online or phone surveys with internal stakeholders.

FIGURE 6

What elements were included in market research?



II. The Details

PARTNERS

Respondents relied heavily on outside consultants as partners in the brand development process (figure 7). Ninety-two percent used market research partners, 78 percent used brand strategy consultants, and 61 percent used creative partners.

Nearly all respondents worked with at least one partner during the process (figure 8). Fifty-two percent of respondents worked with one partner, and 47 percent worked with two or more partners.

FIGURE 7

What brand strategy work did you rely on an outside consulting agency to complete?

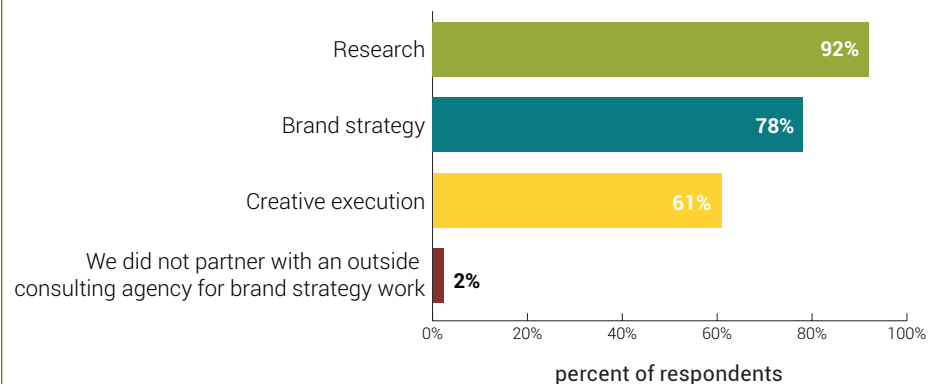
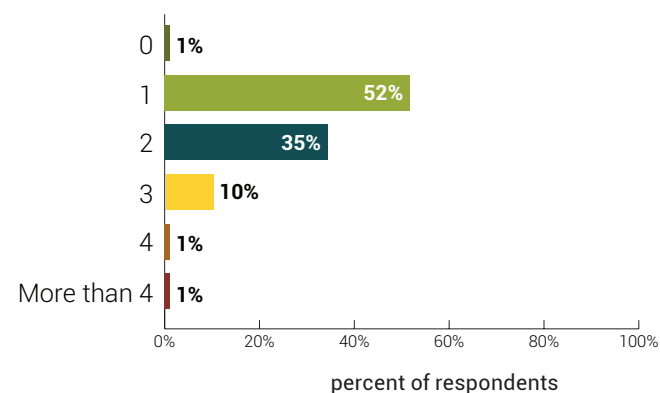


FIGURE 8

How many agencies did you partner with (including creative execution)?



II. The Details

CROSS-FUNCTIONAL TEAMS

As figure 9 shows, most of the respondents who engaged in a brand development process involved a cross-functional committee in their work (79 percent).

Figure 10 indicates that these committees represented a cross-section of the institution's employees. The most common groups included advancement/development professionals (88 percent), enrollment managers (86 percent), public relations employees (83 percent), other staff (83 percent), and faculty (78 percent).

FIGURE 9

Did the development of the brand strategy involve a cross-functional committee?

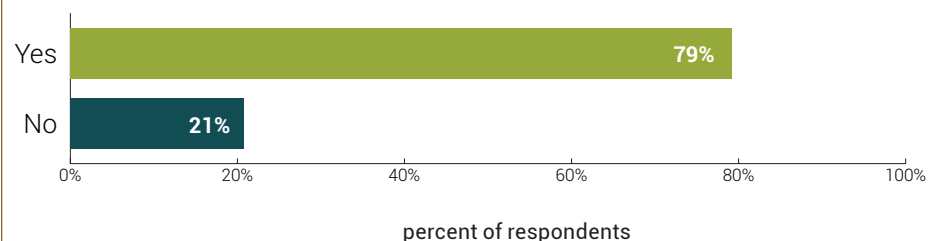
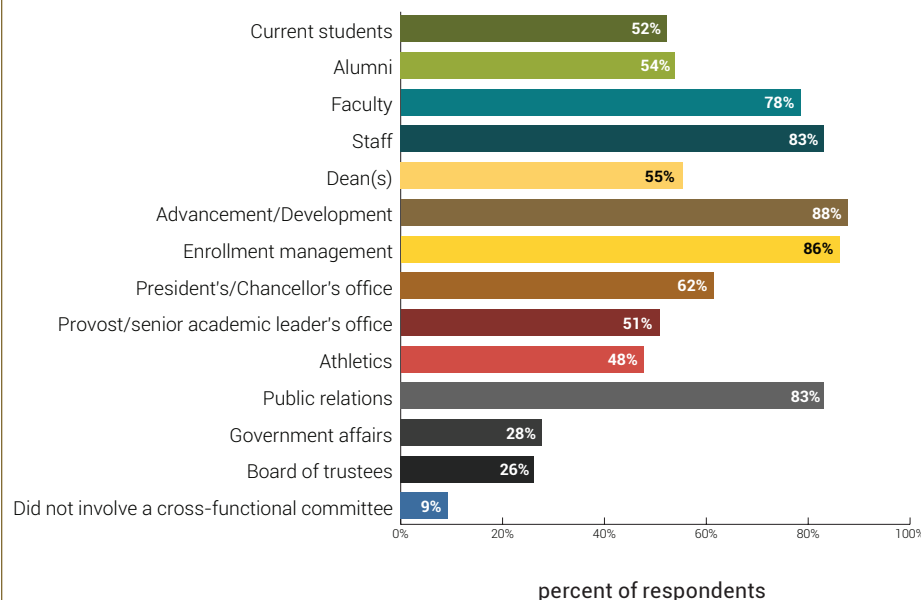


FIGURE 10

If you had a cross-functional committee, who was represented on the committee?



II.

The Details

ROLLOUT

Brand rollout involved a wide range of activities across campus. These included meetings and workshops with internal communications staff (83 percent of respondents), an online or print brand style guide (83 percent), a dedicated web portal or websites (68 percent), announcement emails to the campus (61 percent), dedicated rollout events (43 percent), dedicated print pieces (42 percent), and videos (29 percent).

MEASUREMENT

The most common means used to measure the success of a new brand strategy were business results — specifically, enrollment and fundraising results (53 percent). Others reported evaluating the results as part of a formal holistic marketing measurement process (35 percent), followed by quantitative tracking research (31 percent) and qualitative interviews (27 percent). Another 27 percent of respondents reported that they had no formal measurement processes in place to evaluate the effectiveness of their brand strategy efforts.

FIGURE 11

What have you done to roll out the brand on campus?

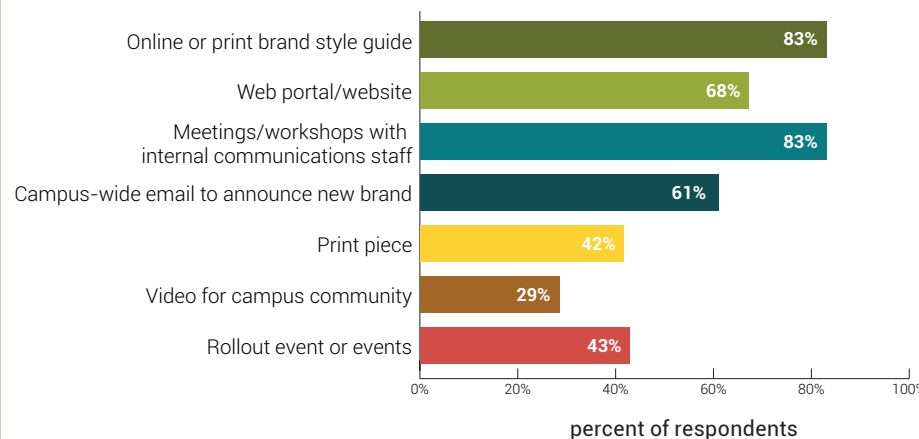
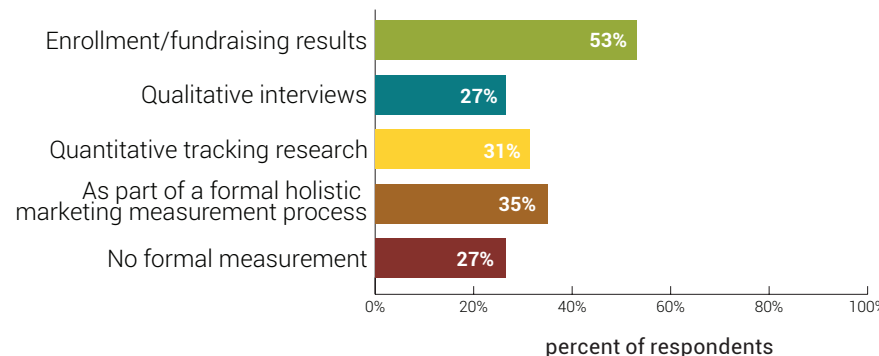


FIGURE 12

How have you evaluated the success of your brand strategy efforts?



II.

The Details

OUTCOMES

When respondents were asked what concrete deliverables resulted from the brand strategy work, they reported a range of outcomes. The three most commonly reported outcomes were identifiable brand positioning (88 percent), detailed brand messaging (86 percent), and a brand usage/style guide (79 percent). Brand strategy efforts often resulted in new creative outcomes as well. Seventy-three percent of respondents reported the process resulted in a new creative campaign, while 44 percent indicated a new tagline resulted from the work, and 38 percent reported developing a new logo.

IMPLEMENTATION

Respondents who had completed a brand strategy project were asked to reflect on how well the brand has been implemented – specifically, how well their institution's current communications reflected the brand strategy. Respondents reported that prospective undergraduate student communications were most likely to reflect the brand strategy, followed by communications targeted to donors, alumni, prospective graduate students, current students, and faculty/staff. Athletics communications were least likely to reflect the brand strategy.

FIGURE 13

What are the concrete deliverables that resulted from your previous brand strategy work?

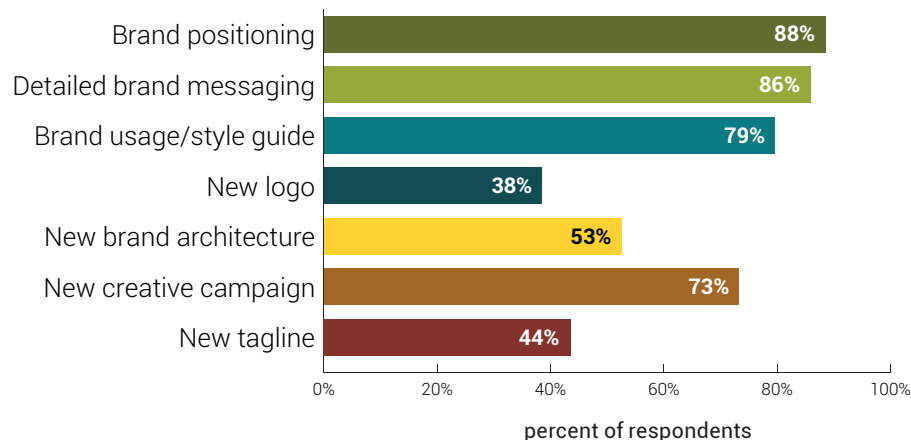
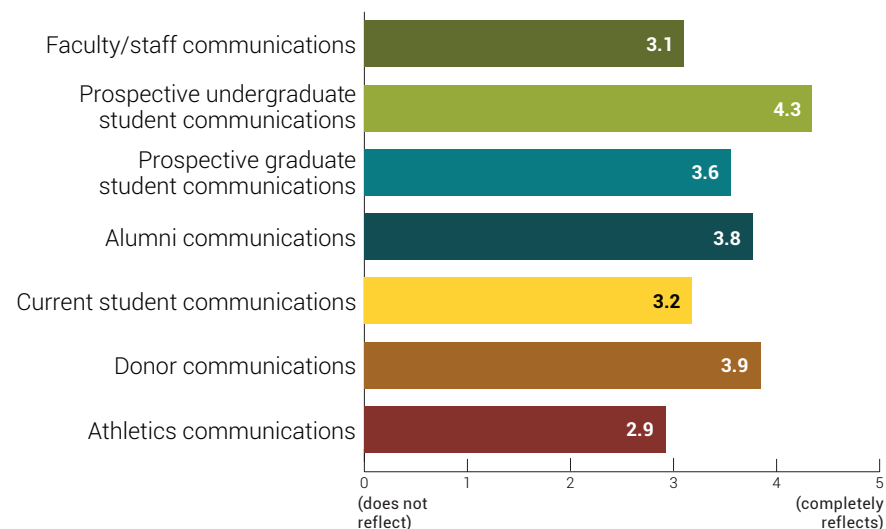


FIGURE 14

Do your current communications reflect the brand strategy?



II.

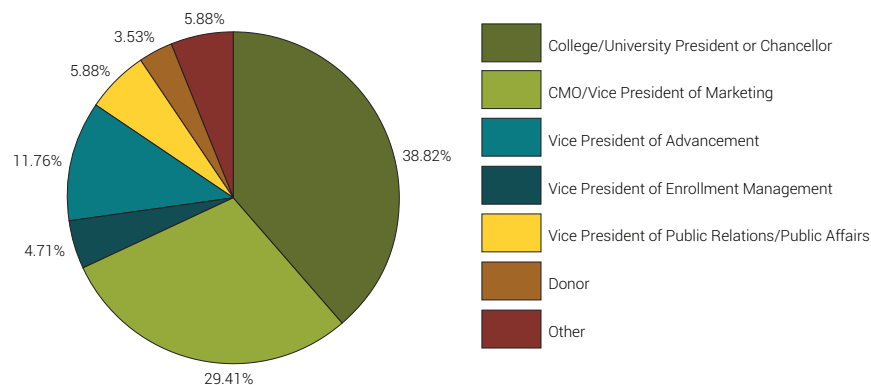
The Details

SPONSORSHIP

Respondents were asked who sponsored and provided funding for the brand strategy work. The most common sources of funding and support were the college/university president or chancellor (39 percent) and the chief marketing officer or vice president of marketing (29 percent).

FIGURE 15

Who was the sponsor of the brand strategy work/ where did the funding come from?

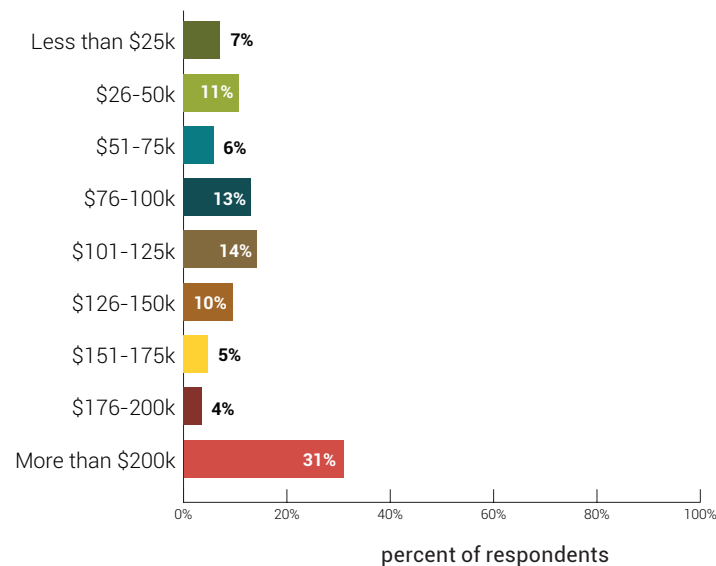


COST

Sixty-three percent of respondents indicated that they had spent more than \$100,000 on brand strategy development. Thirty-one percent said they spent more than \$200,000. Only 18 percent said they spent \$50,000 or less.

FIGURE 16

How much have you spent on brand strategy work in recent years?



II. The Details

VALUE

When asked if the process and output met their expectations and if the brand strategy effort was worth the investment, the overwhelming response was yes. Three-quarters (76 percent) of those who undertook a brand strategy initiative reported that the process and output had met or exceeded their expectations. Just 23 percent of respondents indicated that it somewhat met their expectations, and only 1 percent stated it did not meet their expectations.

When directly asked if the brand strategy work was worth the investment, 93 percent indicated that it was.

FIGURE 17

Did the process and output meet your expectations?

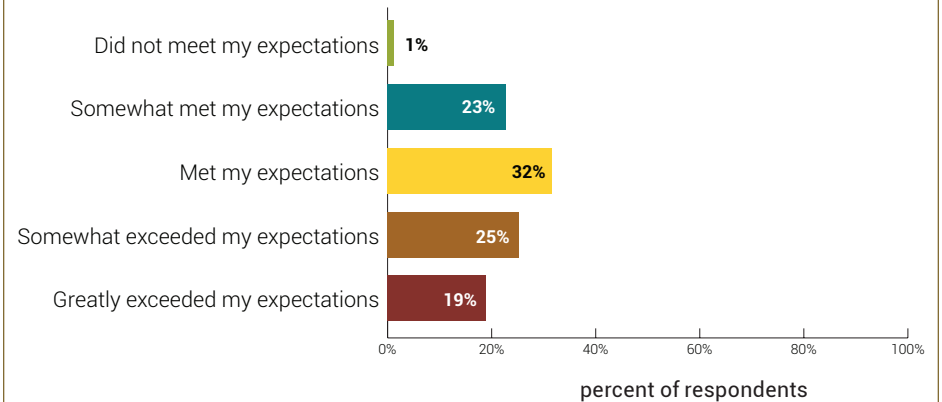
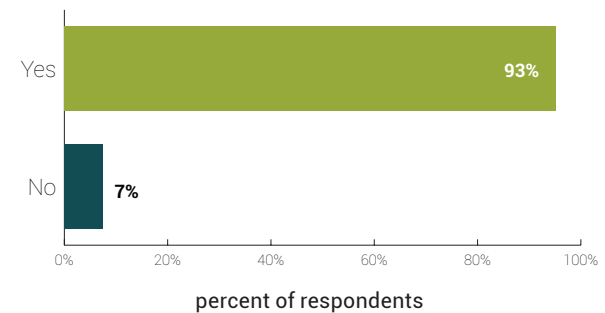


FIGURE 18

Was the brand strategy work worth the investment?



III.

What Worked Well

When we invited survey respondents to tell us what they felt worked well during the process, some common keys to success emerged in their comments.

HAVING THE RIGHT PARTNER IN THE PROCESS

Here are some of the respondents' comments:

- "The research firm that we engaged with was able to not only help us rediscover ourselves as a university, but present a compelling case to leadership for support and next steps."
- "Good research partner, especially in sharing/explaining results."
- "Good partnership with research firm. They were very comprehensive and thorough."

GOOD MARKET RESEARCH

Some sample comments:

- "Using voice of the consumer research to dictate current image and brand identity."
- "Having research to back up our efforts. It's hard to make an argument against the data."
- "Doing lots of research up front, both qualitative and quantitative, created greater buy-in to what we were doing and gave weight to what we shared and developed, especially with faculty and our board."

GAINING SUPPORT FOR THE PROJECT ACROSS CAMPUS

Some sample comments:

- "Responsiveness of campus community in providing insights into college's core strengths and attributes."
- "Presentations to all constituents along the way built excitement and enthusiasm for the project."
- "Cross-unit committee. Support and freedom from president."
- "Full campus and community participation and appreciation of the need for brand strategy."

- "Identifying early adopters who are not typically considered 'communicators' but whose implementation of the new brand was essential to its widespread use."

SUCCESSFUL BRAND EXECUTION

Some sample comments:

- "Building consistency in messaging and design and articulating our distinctive attributes."
- "Provided cohesive marketing messages and creative [execution] for the university, especially for recruitment purposes."
- "Discovery process led to greater clarity on strengths of the institution; distinctive characteristics were identified and incorporated effectively into comprehensive integrated marketing campaign."

IV. Frustrations

We also asked survey participants about frustrations they experienced in carrying out the brand strategy process. These fell into two broad categories.

The first was the loss of support for the effort over the long term. For example:

- "Lack of support in the implementation process."
- "Not enough ongoing funds dedicated to the effort. Once we completed the initial campaign, we have not been able to get funding."
- "Presidential transition led to elimination of budget for integrated marketing initiative after only one year. Consultants had both indicated the brand strategy initiative should be maintained for a minimum of three years in order to see any significant results."

The second category was time issues, representing both frustrations with the length of the process and a desire for more time. For example:

- "Never enough time."
- "Length of time it took to get everyone on board given the number on the committee."
- "Time and effort required to build understanding of brand and how foundational it can be."

V. What Would You Do Differently?

When we asked respondents what they would do differently if given the chance, respondents cited the need for even more support at the highest level of the university.

These are some examples of comments regarding support from the president's office:

- "Seek total buy-in from the president's office. i.e. willing to enforce, as leadership, the brand with those who were less than supportive."
- "Have the president attend as many small meetings as possible. It shows top-down buy-in (not just a letter endorsing the efforts)."
- "The president needs to be completely bought in and willing to include in strategic planning for the entire university. It can't be just a communications effort."

They also noted the need for more internal communication about the brand rollout. Some comments:

- "Every year, roll out the brand messaging for faculty and staff."
- "Spend more time on developing internal communication tools — videos, presentations etc. to [communicate the] brand."

Appendices

1 & 2

About the Authors

APPENDIX 1: METHOD

These results are based on a survey of directors of marketing, vice presidents, and chief marketing officers of four-year, not-for-profit colleges and universities. Of those invited to participate, 125 executives completed the survey. This translated to a 32 percent completion rate.

Sixty-eight percent of those responding work for a private four-year institution.

Data was collected between October and December 2014.

APPENDIX 2: WHAT IS A BRAND?

For a road map on developing a higher ed brand, [download our brand strategy white paper](#).



ABOUT DEBORAH MAUE

Deborah Maue is a senior strategist at mStoner, where she leads the firm's market research and brand strategy practice. Deb has 20+ years of experience in consumer packaged goods and higher education marketing. Deb spent 15 years in brand management and innovation roles at Unilever and Schering-Plough Healthcare products, working on brands like Suave, Axe, and Degree.

She then spent seven years as the Associate Vice President for Marketing Strategy at DePaul University, where she led DePaul's strategic marketing efforts. Prior to coming to mStoner, Deb led the higher education group at TRU, the global leader in teen and young adult insights.



ABOUT TOM HAYES, PH.D.

Tom Hayes is chair and professor of marketing at Xavier University where he has taught for the last 39 years. He is a nationally recognized expert in the marketing of higher education, and consults on a national and international basis. He is the founder of the AMA's Symposium for the Marketing of Higher Education and has been awarded both the Crystal Apple and Alice Beeman Award by CASE. He was awarded an ACE Fellowship for the 2004-2005 academic year, which he served at Kenyon College.

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