



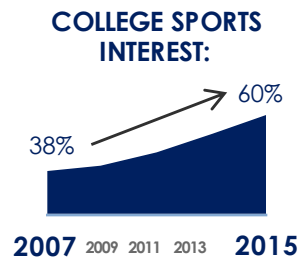
NCAA Brand Study



Summary of Findings

College sports interest & NCAA favorability on the rise

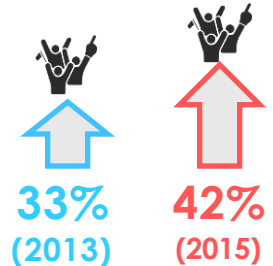
- **Interest in college sports continues to grow:** College sports interest has grown steadily over time, reaching a study-long height in 2015 with 6 in 10 rating their interest an "8," "9," or "10" on a 10 point scale.
- **Student-athletes get a "good deal":** A significant majority of respondents believe that student-athletes are getting a "good deal," and fewer than 10% believe college athletes are getting a "bad deal."
- **Part of problem or solution?:** When addressing issues related to student-athletes, the NCAA is more likely to be perceived as "part of the solution" vs. "part of the problem."
- **NCAA familiarity and favorability strong:** NCAA familiarity and favorability have shown growth over time, with both measures reaching study-long peaks in 2015 (58% reported top-3 box familiarity and 51% reported top-3 box favorability in 2015). Additionally, a majority of respondents indicated they believe the NCAA is doing a "Better job" than it was 5 years ago, while very few believe it is doing a "Worse job."



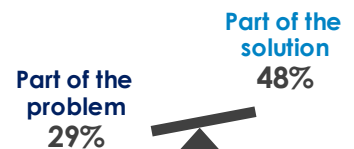
S-As: GETTING A GOOD OR BAD DEAL?



% REPORTING COLLEGE SPORTS INTEREST HAS INCREASED VS 5 YRS AGO

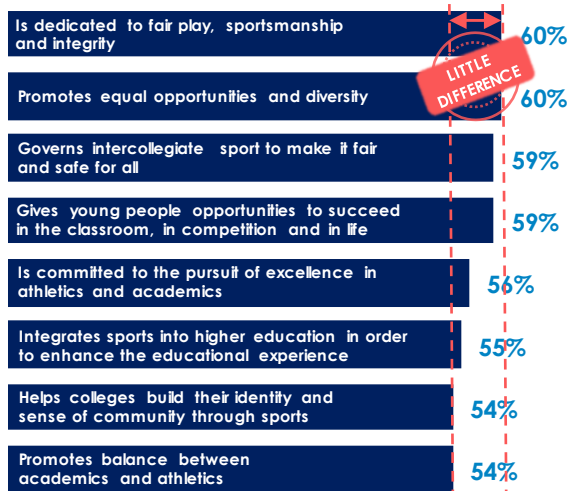


When addressing issues related to college sports and student-athletes is the NCAA more....?



Focus on mission and message

IMPORTANCE OF NCAA'S 8 MISSION ELEMENTS

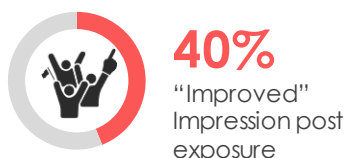


- **Most get NCAA info from TV:** Television was the primary source for getting information about the NCAA, followed somewhat distantly by websites. When respondents were asked about the tenor of NCAA coverage on media sources, TV was ranked as most positive and social media platforms were generally ranked as most negative (with the exception of Facebook).
- **NCAA mission blurred:** When respondents were asked to rate the importance of each part of the NCAA's mission (derived from the 2004 Strategic Plan), there was little differentiation among the 8 elements; similarly, the NCAA's achievement in implementing each area had a limited range.

PSA RECALL



IMPACT OF PSA EXPOSURE ON "IMPROVED" NCAA IMPRESSION



- **"Cheer" PSA improved NCAA impression:** Nearly one-quarter of respondents recalled seeing the "Cheer" PSA. After watching it, their impression of the NCAA was "Improved" for two out of five respondents, with the opinion of the remaining three out of five stayed unchanged.

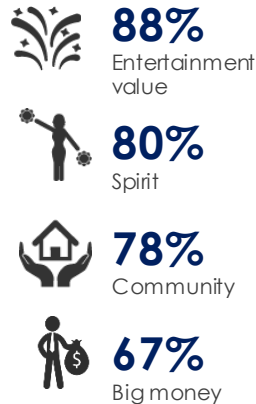


Summary of Findings (continued)

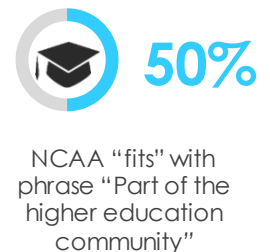
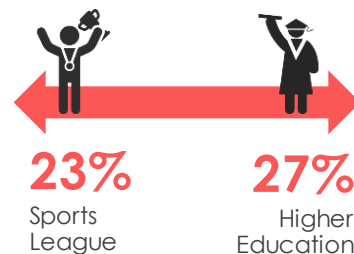
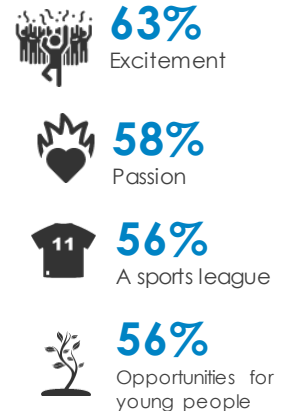
» Sports-related imagery persists

- **NCAA strongly tied to sports imagery:** When respondents were asked about how they perceive the NCAA, sports-related imagery was primary. Respondents were most likely to associate the NCAA with the phrases "Provides entertainment value," "Spirit," "Community," "Excitement," "Passion," and "A sports league (like the NFL, NBA, MLB etc.)."
- **Still work to do on communicating academic message:** Association with "Academic achievement," "Integrity," and "Intelligence" was not as strong as with sports/entertainment phrases.
 - But when respondents were asked to place the NCAA on a 10-point scale ranging from "Sports league" to "Higher education," results were fairly evenly split.
- **Decreased negative associations, increased positive:** While there is still work to be done communicating academic role, the data reveals that, over time, negative imagery related to the NCAA has decreased (e.g., "Controlling," "Red tape," "Big money") while positive associations have strengthened (e.g., "Excitement," "Passion," "Community").

% AGREEING W/PHRASES TO DESCRIBE NCAA

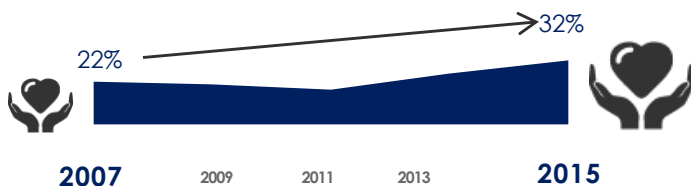


% INDICATING PHRASES "GOOD FIT" W/NCAA

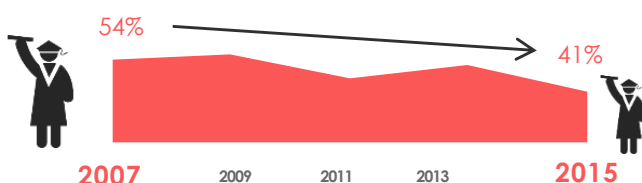


» Issues facing college sports are evolving

ISSUES FACING COLLEGE SPORTS IN NEXT 10 YRS: (#3 ISSUE) HEALTH AND SAFETY



ISSUES FACING COLLEGE SPORTS IN NEXT 10 YRS: (#1 ISSUE) KEEPING EDUCATION PRIORITY



- **Health and safety issues growing concern:** When asked to identify the most significant issues college sports will face in the next decade, respondents were much more likely to identify "Health and safety issues" and "The welfare of student-athletes" as key concerns than they were in previous years.
- **Prioritizing education remains primary issue, but softening:** Respondents were most likely to identify "Keeping education a priority" as a significant issue facing college athletics in the next 10 years. While this has ranked as the leading issue throughout the study, prioritizing education was a significantly bigger concern in past years than in 2015.
 - Similarly, "Keeping college sports amateur" and "Gambling" were deemed less significant issues this year than in previous studies.