



# ASU GSI Q4 National Sports Public Opinion Pulse Update

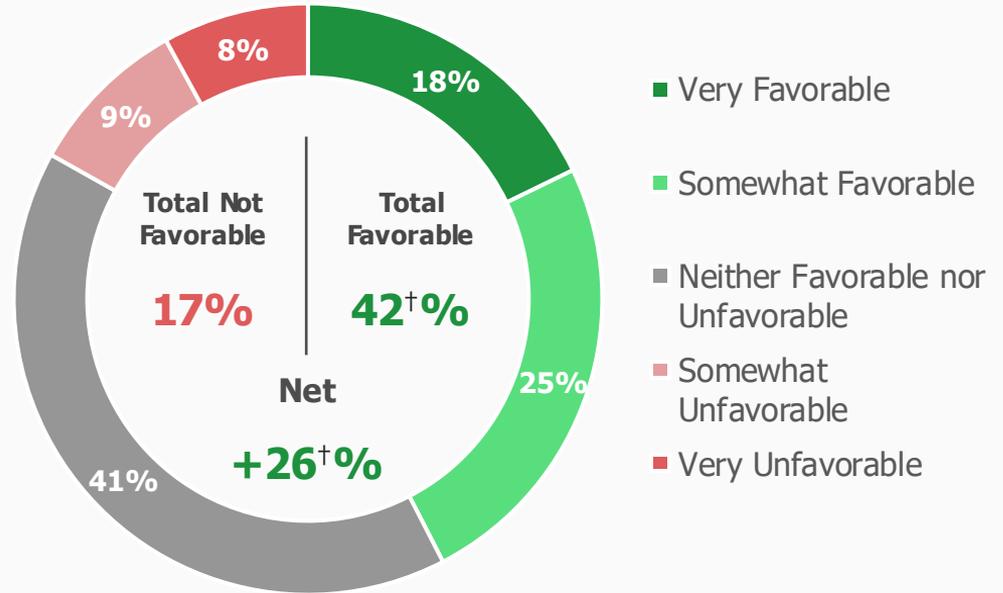
November 9, 2021

# Tracking Questions

# Sports Favorability

- NFL (63%), MLB (58%), and NBA (49%) are still the top three favorite sports leagues in America. The changes between each quarter in 2021 were not significant.
- NCAA (42%) was the fourth most favorable sports league and NHL (39%) ranked fifth

## Favorability of NCAA



Q) Please rate your personal opinion of the following sports leagues, regardless of whether you consider yourself a fan of the sport it represents. (n=1800)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# Of all the college sports, only college football was favored by most Americans

Q4 Rank	League	Score (weighted mean) Average = 5.5
1 <sup>st</sup>	Professional Football	4.01
2 <sup>nd</sup>	Professional Baseball	4.74
3 <sup>rd</sup>	<b>College Football</b>	<b>4.93</b>
4 <sup>th</sup>	Professional Basketball	5.31
5 <sup>th</sup>	College Basketball	5.65
6 <sup>th</sup>	Hockey (both professional and college)	6.53
7 <sup>th</sup>	College Baseball	6.74
8 <sup>th</sup>	Soccer (both professional and college)	6.82
9 <sup>th</sup>	Automobile Racing (NASCAR, Formula 1, etc.)	6.83
10 <sup>th</sup>	Tennis (both professional and college)	6.90
11 <sup>th</sup>	Golf (both professional and college)	7.54

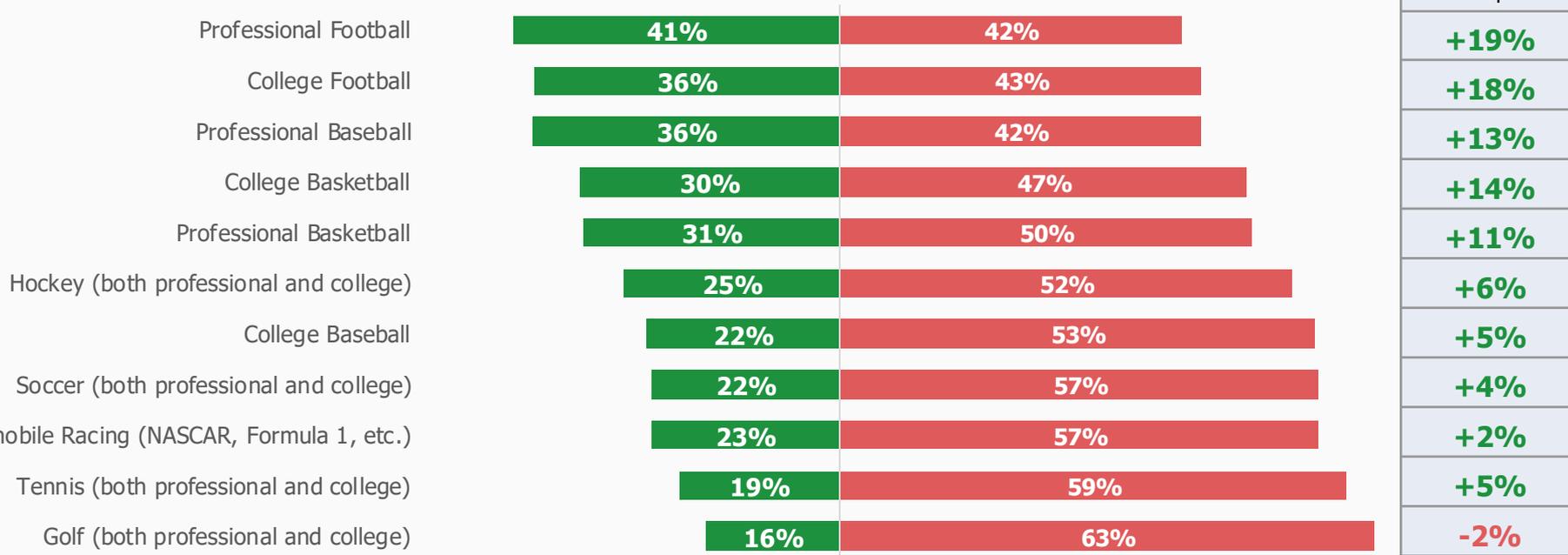
Q) Please rank the following sports in order with 1 being your "most favorite" and 11 being your "least favorite." (n=1800)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# Overall, people from all states are more unlikely than likely to attend any sports events in person in the next twelve months

## Likelihood to Attend Sports Events in Person

■ Total likely ■ Total unlikely



# Project Objectives

## Identify

- Identify the attitudes of the general public towards the new rules about college athletes' N-I-L and their reasons behind supporting or opposing the N-I-L rule
- Identify the public's perception of the demographic groups that will benefit most from the implementation of allowing college athletes to profit from their N-I-L

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## Discover

- Discover the best practice of how to implement the N-I-L rules
- Discover how perceptions differ between college athletes' N-I-L and high school athletes' N-I-L

2

# Identify

Identify the attitudes of the general public towards the new rules about college athletes' N-I-L and their reasons behind supporting or opposing the N-I-L rule

# Most respondents have heard about the implementation of allowing college athletes to profit from N-I-L, but few have seen the practice

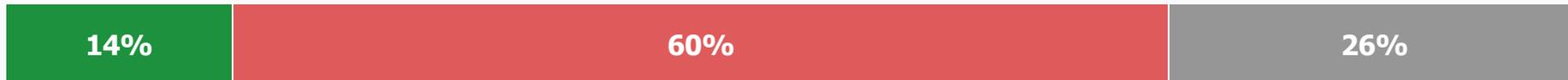
## How Much have you Seen or Heard about the N-I-L Debate?

■ A great deal ■ A moderate amount ■ Some ■ A little ■ Nothing at all



## Have you Seen or Heard a College Athlete's Endorsement?

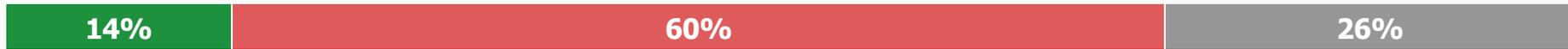
■ Yes, I have ■ No, I have not ■ I do not recall



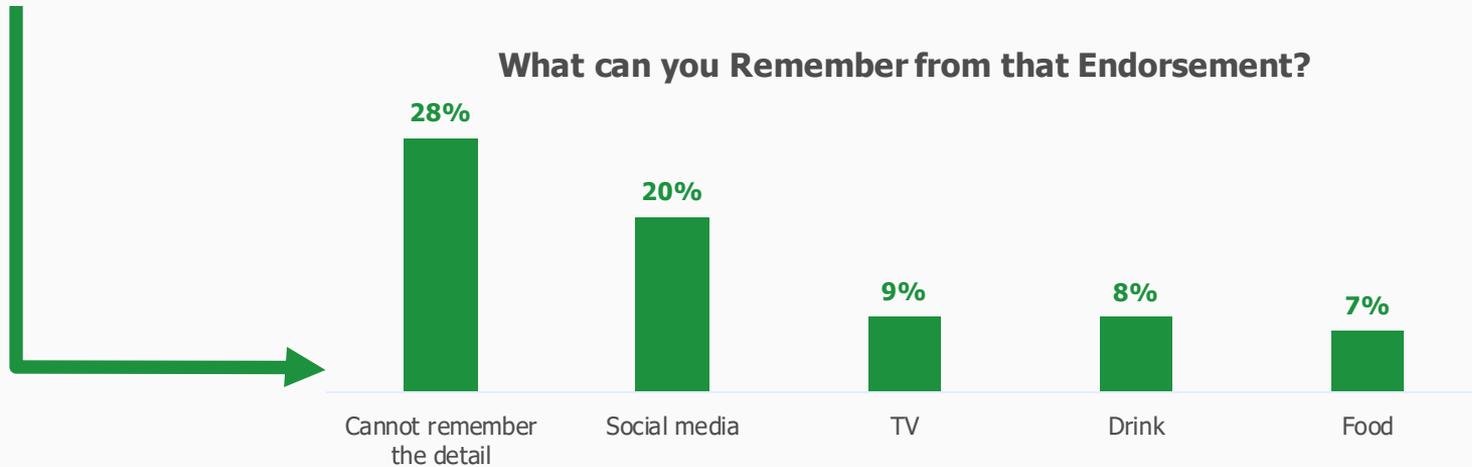
# More than one quarter cannot recall the specifics of a college athlete's endorsement, even if they have seen one

## Have you Seen or Heard a College Athlete's Endorsement?

■ Yes, I have ■ No, I have not ■ I do not recall



## What can you Remember from that Endorsement?

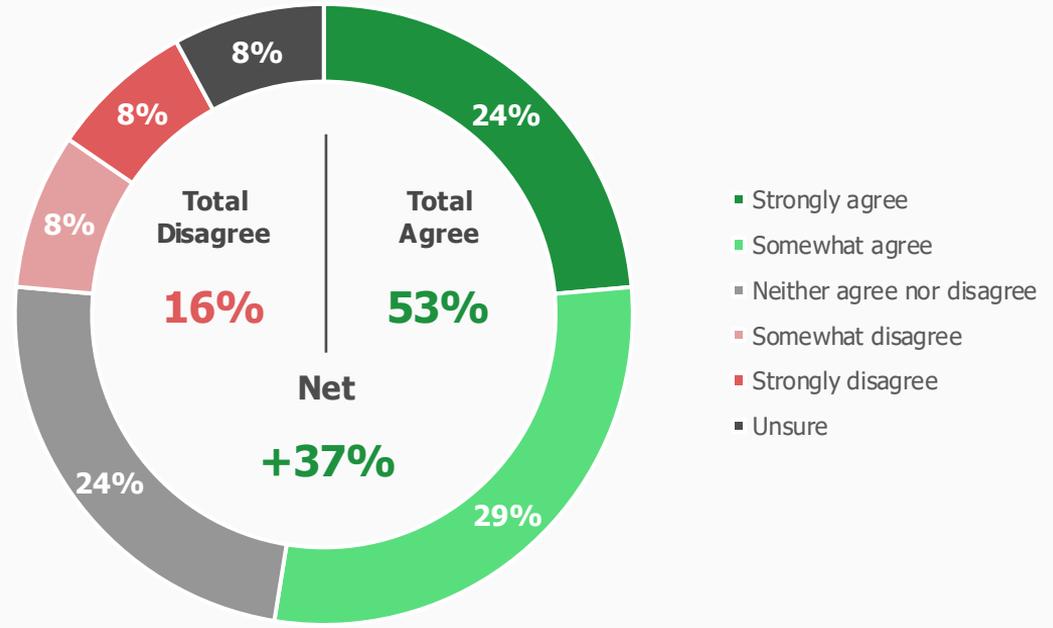


Q) Recently, have you seen or heard a college athlete's endorsement of a product or service on an advertisement or a similar platform? (n=1800)  
Q) Please describe what you can remember from that endorsement. If you are able, please let us know where you saw/heard the endorsement (e.g., social media, television, radio, etc.), who the athlete was, which school the athlete was from, and which product/service they were endorsing. (n=160)  
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# More than half of respondents are in support of allowing college athletes to make money from their N-I-L

- Demographic groups that are more likely to be a supporter:
  - Black/African Americans
  - Parents of minor children
  - Males
  - 35–44-year-olds
  - HHI \$35k - \$50k
- Demographic groups that are more likely to be an opposer:
  - 65+ years old
  - HHI \$75k - \$250k
  - Four-year college graduates
  - Asians

## Opinion of N-I-L



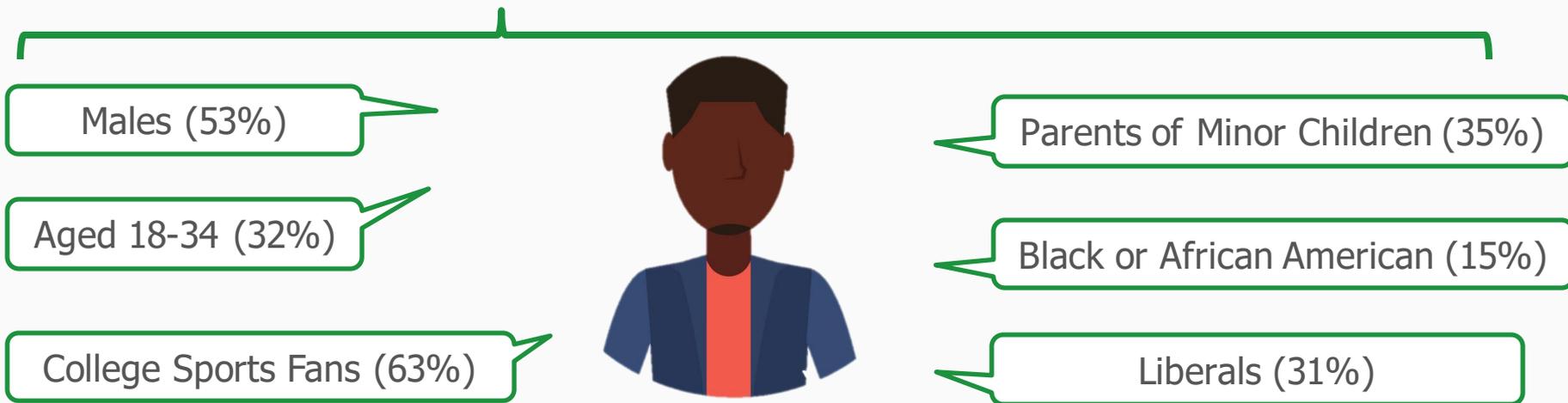
Q) Recently, the NCAA (the organization in charge of regulating college sports in the United States) began allowing college athletes to make money from their N-I-L. This means that current and incoming athletes are now able to make money from social media, endorsements, autograph signings, and other financial opportunities. However, colleges and universities are still prohibited from paying their athletes a salary. Do you agree or disagree with the NCAA's decision to allow college athletes to make money from their N-I-L? (n=1800)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# Supporters of N-I-L are disproportionately younger African American men

## Opinion of N-I-L

Strongly agree   Somewhat agree   Neither agree nor disagree   Somewhat disagree   Strongly disagree   Unsure



# Opponents of N-I-L are disproportionately older white men

## Opinion of N-I-L

Strongly agree   Somewhat agree   Neither agree nor disagree   Somewhat disagree   Strongly disagree   Unsure



Males (57%)

Aged 65+ (38%)

College Sports Fans (57%)

Four-Year College Graduate or more (52%)

Currently Married (60%)

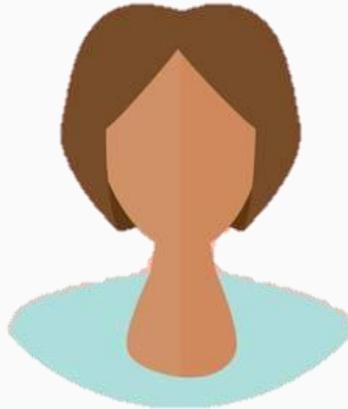
White Non-Hispanic (70%)

Favorable of NCAA (45%)

# Those who are neutral on the topic of N-I-L tend to be younger females, uninterested in college sports

## Opinion of N-I-L

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Unsure



Females (62%)

Aged 18-34 (33%)

HHI under \$35k (40%)

Non-College Sports Fans (67%)

Hispanics (19%)

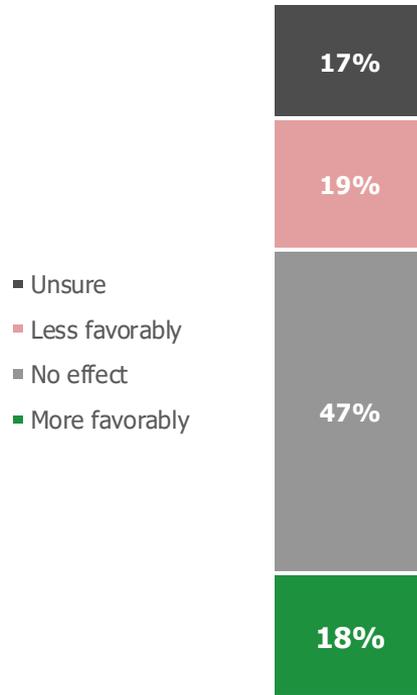
Single, Never Married (39%)

Non-Parents (46%)

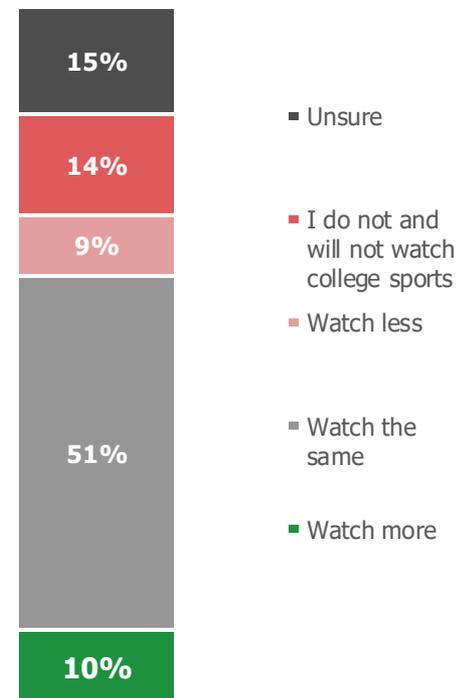
# The N-I-L rule doesn't significantly change the opinions or viewing habits of most respondents

- 34% of respondents said that the N-I-L rule has no effect on **either** their attitude **or** viewing habits
- 7% said the rule makes them view college sports more favorably **and** will watch more. 6% said they are less favorable **and** will watch less.
- The N-I-L rule impacted opinions of college sports more positively than it did viewing behavior

## Change of Opinion



## Change of Behavior



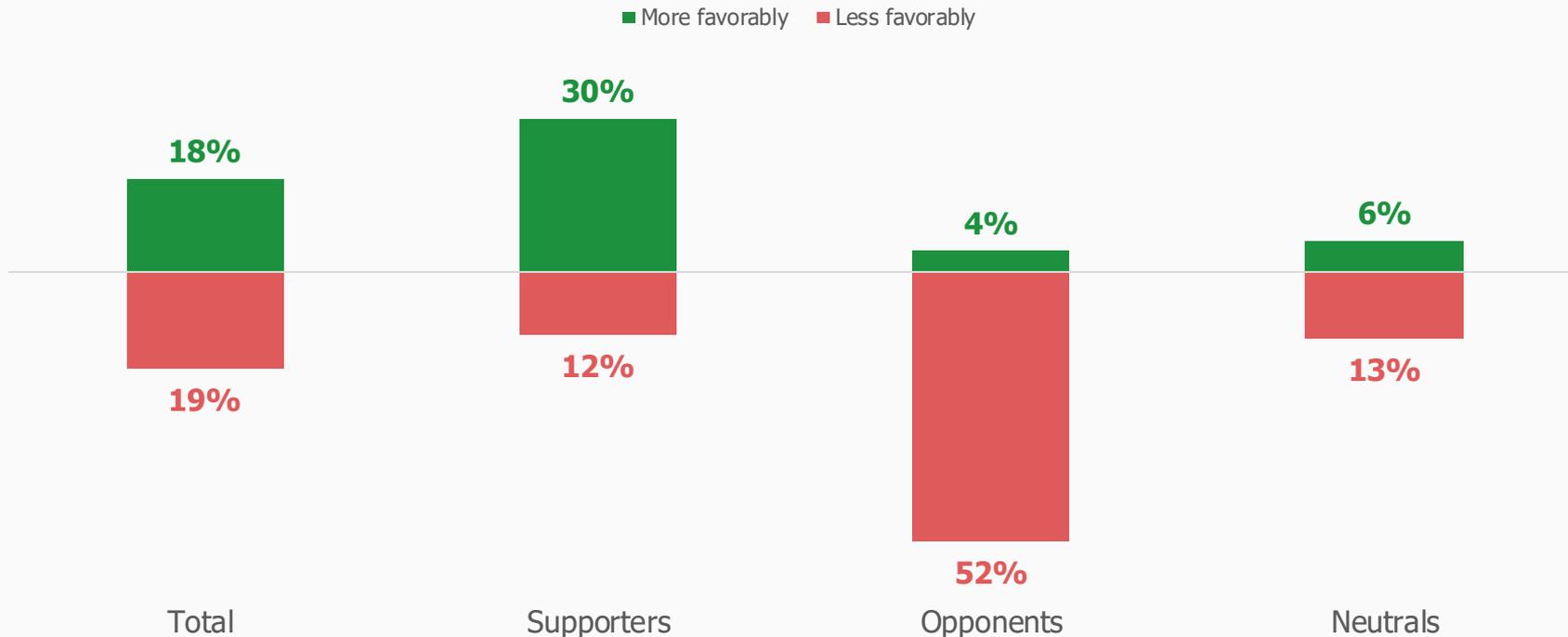
Q) How has this rule change which allows college athletes to make money from their N-I-L affected your opinion of college sports, in general?

Q) How has this rule change that allows college athletes to make money from their N-I-L affected your viewing habits of college sports, in general? (n=1800)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# A majority of N-I-L opposers view college sports less favorably while less than one third of N-I-L supporters view college sports more favorably

## Change of Opinion about College Sports due to N-I-L



Q) How has this rule change which allows college athletes to make money from their N-I-L affected your opinion of college sports, in general?

Q) Do you agree or disagree with the NCAA's decision to allow college athletes to make money from their N-I-L?

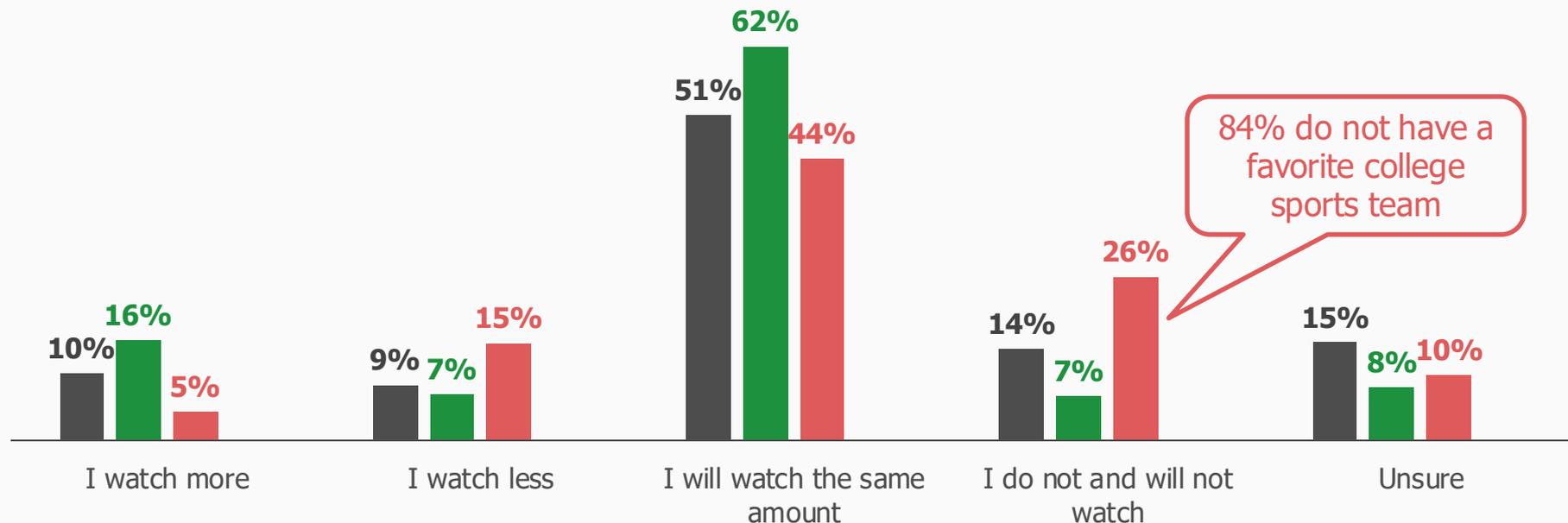
Subgroup: Supporters (n=946), Opponents (n= 282), Neutrals (n=572)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# Pluralities of both supporters and opponents of N-I-L anticipate that they will watch the same amount of college sports as they did before the rule change

## Change of College Sports Viewing Habits Due to N-I-L

■ Total ■ Supporters ■ Opponents



Q) How has this rule change that allows college athletes to make money from their N-I-L affected your viewing habits of college sports, in general?

Q) Do you agree or disagree with the NCAA's decision to allow college athletes to make money from their N-I-L?

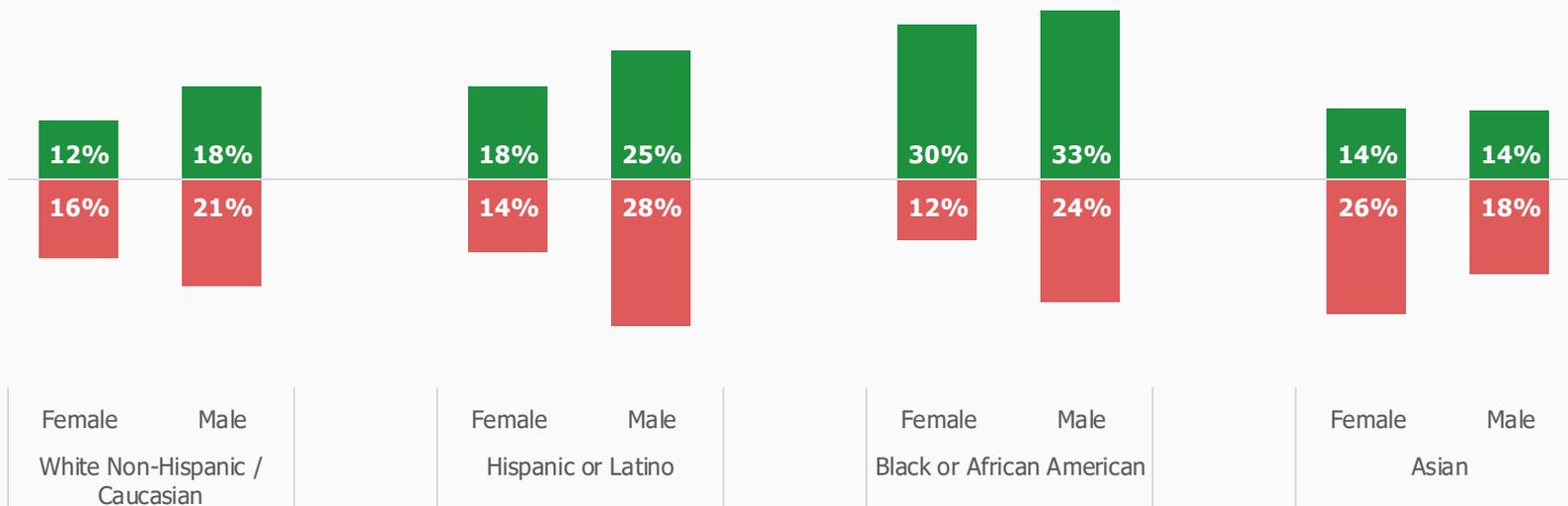
Subgroup: Total (n=1800), Supporters (n=946), Opponents (n=282)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# African Americans – especially female African Americans – view college sports more favorably due to the N-I-L rule change than other ethnicities

## Change of Opinion about College Sports by Gender and Ethnicity

■ I view college sports more favorably ■ I view college sports less favorably

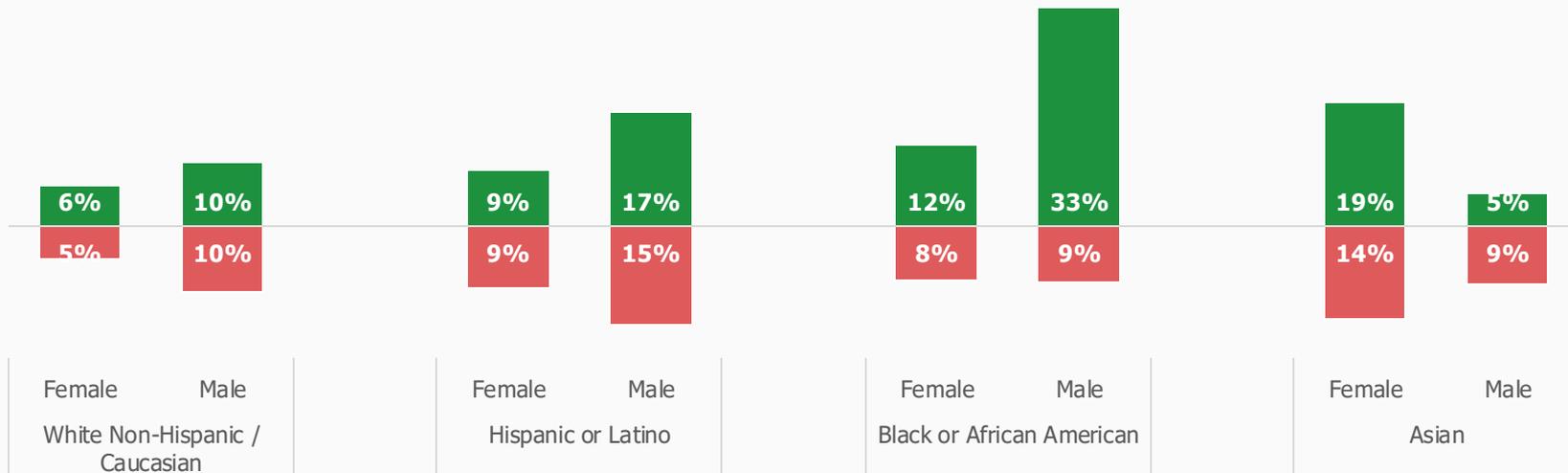


Q) How has this rule change that allows college athletes to make money from their N-I-L affected your viewing habits of college sports, in general?  
 Subgroup: White Non-Hispanic female (n=554), Hispanic female (n=163), Black or African American female (n=123), Asian female (n=57),  
 White Non-Hispanic male (n=579), Hispanic male (n=132), Black or African American male (n=96), Asian male (n=51)  
 † Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# Even though African American females are more favorable of college sports, their watching habits haven't increased as much as African American males

## Changes of College Sports Watching Habits by Gender and Ethnicity

■ I watch college sports more ■ I watch college sports less



Q) How has this rule change that allows college athletes to make money from their N-I-L affected your viewing habits of college sports, in general?

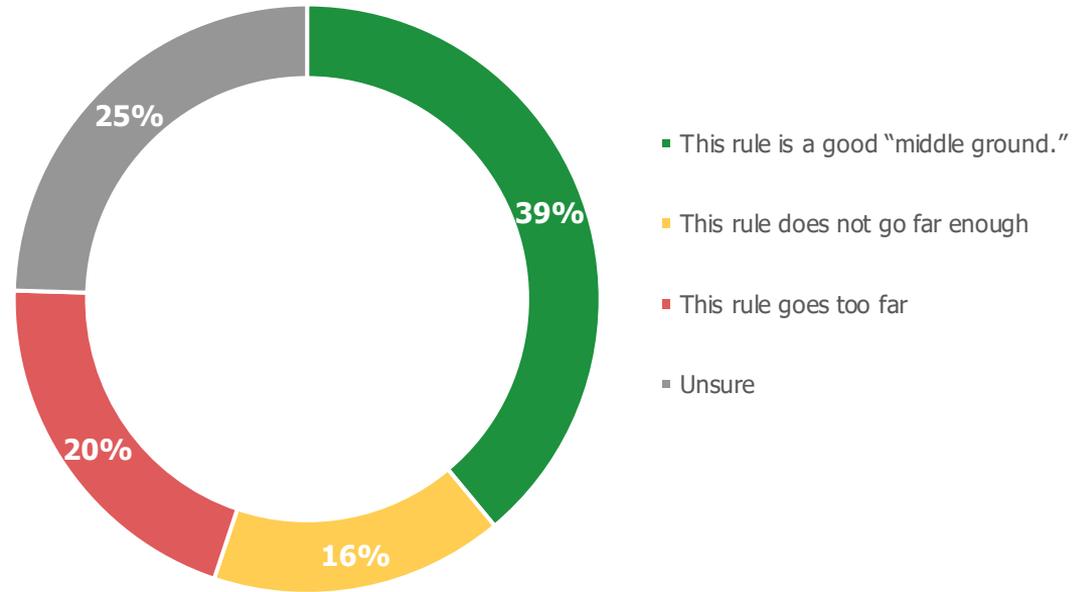
Subgroup: White Non-Hispanic female (n=554), Hispanic female (n=163), Black or African American female (n=123), Asian female (n=57), White Non-Hispanic male (n=579), Hispanic male (n=132), Black or African American male (n=96), Asian male (n=51)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# A plurality think the new N-I-L rule is a good “middle ground”

- Groups likely to have a “good middle ground” opinion:
  - Southern region
  - Non-Hispanics
  - Middle aged (35-64-year-olds)
- Groups likely to have a “rule does not go far enough” opinion:
  - Pacific and Plains regions
  - Hispanics
  - 18-34-year-olds
- Groups likely to have a “rule goes too far” opinion:
  - HHI over \$75k
  - College grad or higher education
  - Ages 65+

## Opinion of the New N-I-L Rule



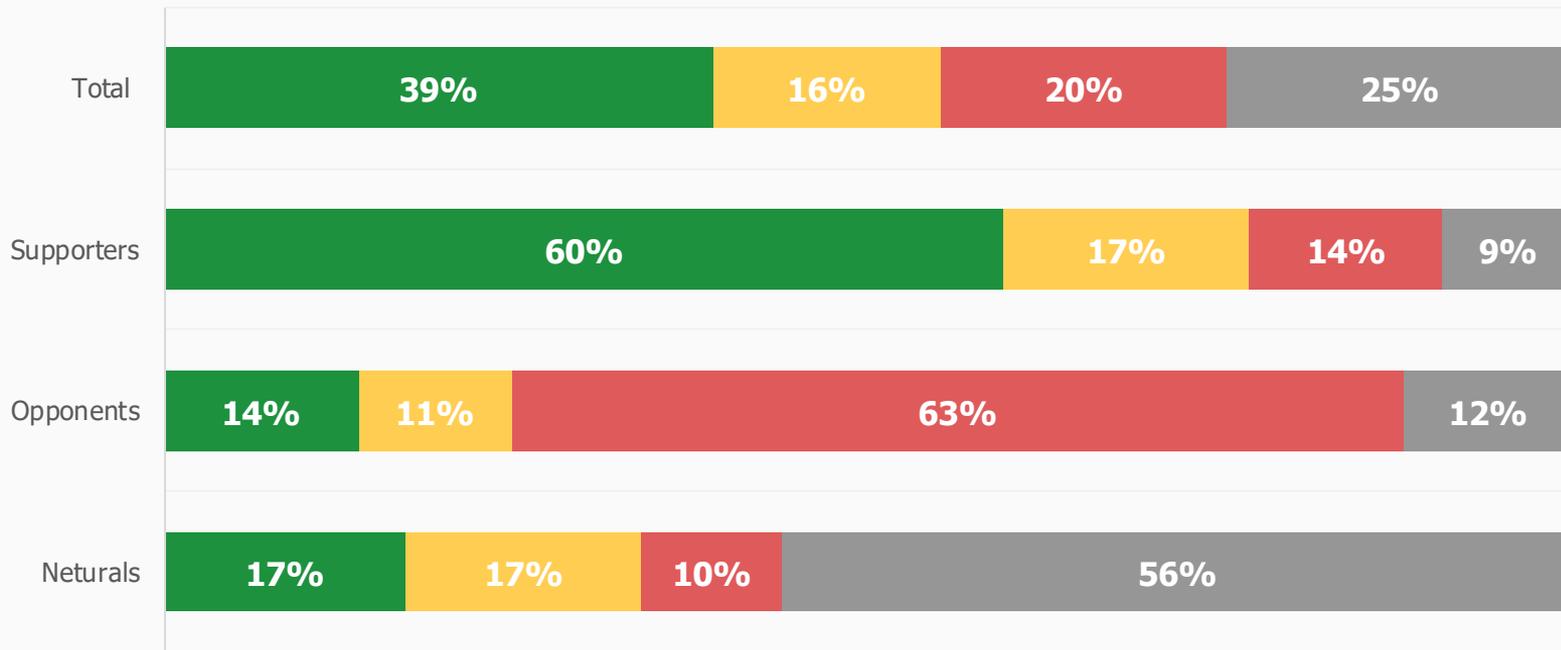
Q) Which of the following statements comes closest to your opinion of the decision regarding the NCAA’s new N-I-L rule, even if none are exactly correct? (n=1800)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# N-I-L supporters consider the rule a good middle ground, whereas opposers think the rule goes too far

## Opinion of N-I-L Rule

■ This rule is a good "middle ground." ■ This rule does not go far enough ■ This rule goes too far ■ Unsure



Q) Which of the following statements comes closest to your opinion of the decision regarding the NCAA's new N-I-L rule, even if none are exactly correct?

Q) Do you agree or disagree with the NCAA's decision to allow college athletes to make money from their N-I-L?

Subgroup: Total (n=1800), Supporters (n=946), Opponents (n=282), Neutrals (n=572)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

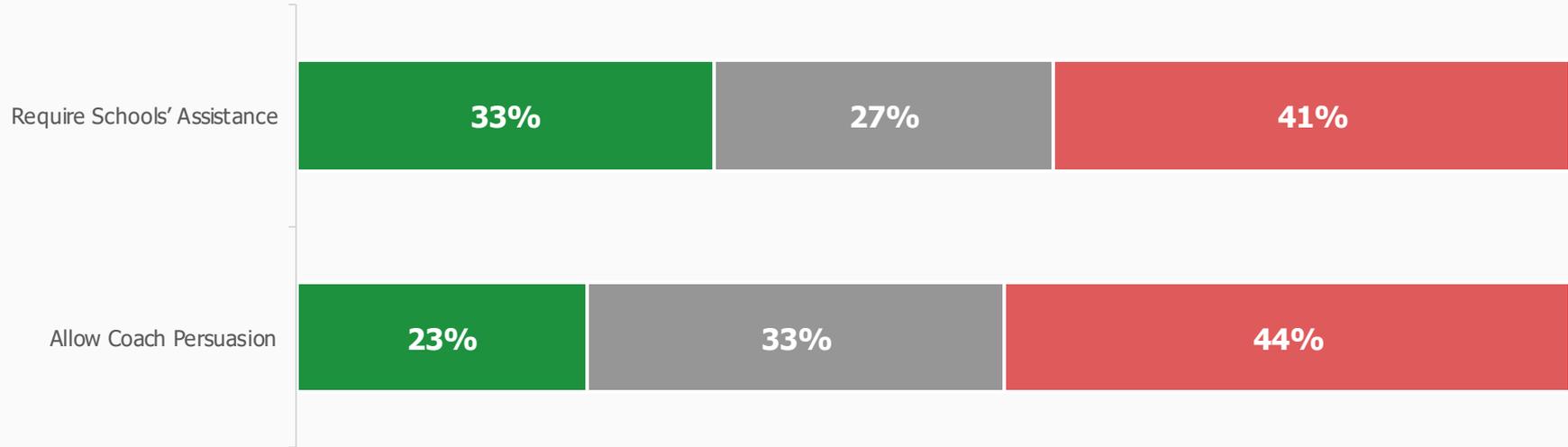
# Discover

Discover the best practice of how to implement the N-I-L rule

# Pluralities of respondents think N-I-L agreements should be affected by neither schools nor coaches

## Should Schools/Coaches Affect N-I-L Agreements?

■ Yes ■ Unsure ■ No



Q) Should a university be required to provide professional services personnel (for example, marketing agents, lawyers, financial advisors) to assist their athletes with potential N-I-L agreements?

Q) Should a coach be allowed to use the potential for N-I-L agreements to persuade a current college athlete to transfer to the coach's college/university?

Note: This does not include intramural sports. (n=1800)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# One quarter of all respondents think that coaches and schools should be independent from student athletes' N-I-L agreements

% Of Total Respondents		Require Schools' Assistance		
		Yes	No	Unsure
Allow Coach Persuasion	Yes	14%	7%	40%
	No	12%	27%	
	Unsure			

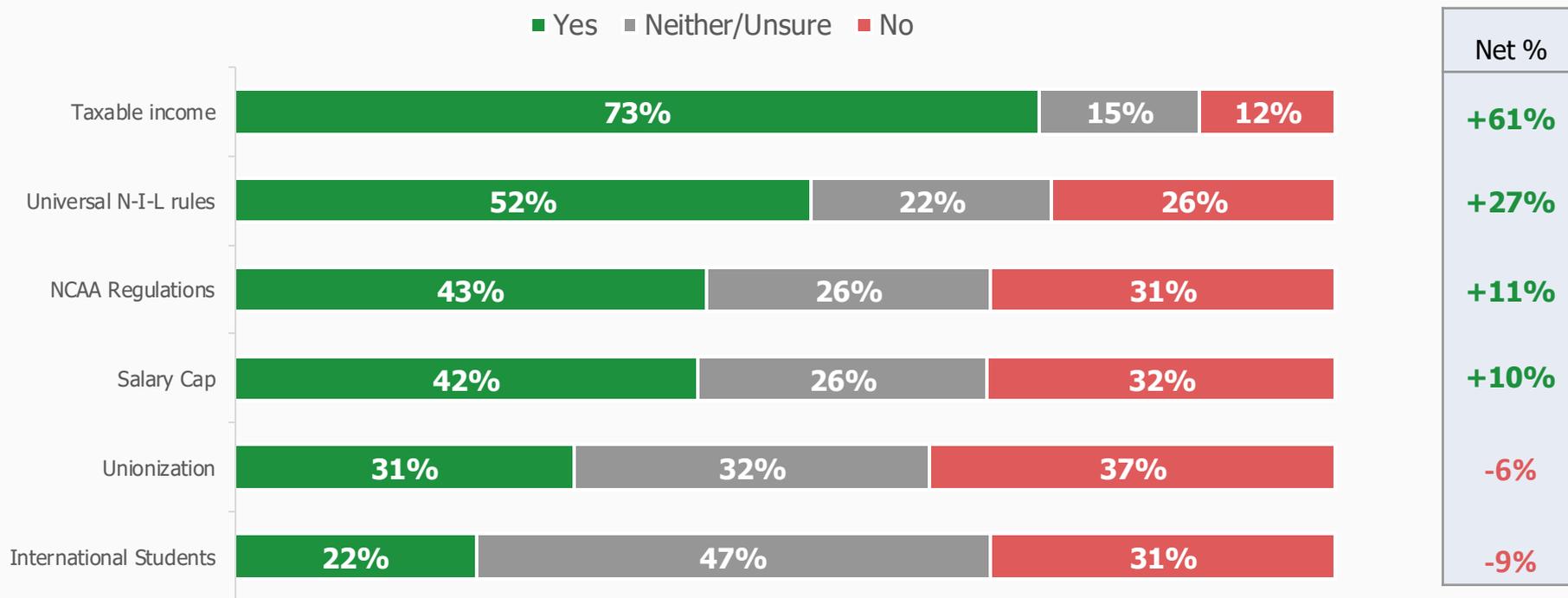
# Potential Implementations for the N-I-L Rule

Short Summary	Full Implementation Text
Salary Cap	Now that this rule has been implemented, regardless of your opinion about the rule, should there be a limit to the amount of money that a college athlete can make from their N-I-L during their time in college?
Taxable Income	Do you believe any money that an athlete makes from their N-I-L agreements should be taxed as regular income, like salaries?
Unionization	Do you believe the athletes should be allowed to unionize?
International Students	As of now, many international student-athletes in the United States are excluded from this rule change regarding N-I-L. Do you agree or disagree with this exclusion of international students from N-I-L?
Universal N-I-L rules	Should colleges and universities be allowed to have their own rules, or should all schools agree to the same set of rules?
NCAA Regulations	Who should be in charge of enforcing the rules regarding college athletes' N-I-L: The athlete's college or university, the NCAA, or the federal or state government?

# Respondents agree that N-I-L income should be taxed and that there should be universal rules regarding N-I-L. However, there is less agreement whether athletes should be allowed to unionize or whether the new rule should apply to international students

## Support for N-I-L Implementations

■ Yes ■ Neither/Unsure ■ No



\*See slide 24 for question verbiage.

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# \$100,000 could be an ideal salary cap for college athletes earning money from their N-I-L agreement

## Salary Cap for College Athletes' N-I-L Agreement



Q) What should the limit (i.e. maximum dollar amount) be that a college athlete can make from their N-I-L during their time in college? (n=754)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

4 Outliers were excluded

# Top 5 and bottom 5 industries that should/should not allow college athletes to associate their N-I-L with products and services:

Industries	Allowed	Not Allowed	Net
Education (player's own university)	42%	10%	+32%
Breakfast Foods	41%	10%	+31%
Energy/Nutrition Products & Services	41%	10%	+31%
Beverages – Non-Alcohol	42%	11%	+30%
Automotive – Vehicles	38%	13%	+25%
	.....		
Healthcare – Prescriptions	19%	19%	0%
Government/Institutional/Recruitment	20%	20%	-1% <sup>†</sup>
Healthcare – Cannabis	14%	25%	-11%
Beverages – Alcohol	20%	40%	-20%
Gambling	9%	38%	-30%



Q) Please indicate whether you think college athletes **should be** allowed to associate their N-I-L with any of the following types of products and services. Select all that apply.  
 Q) Please indicate whether you think college athletes **should not be** allowed to associate their N-I-L with any of the following types of products and services. Select all that apply.  
 † Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

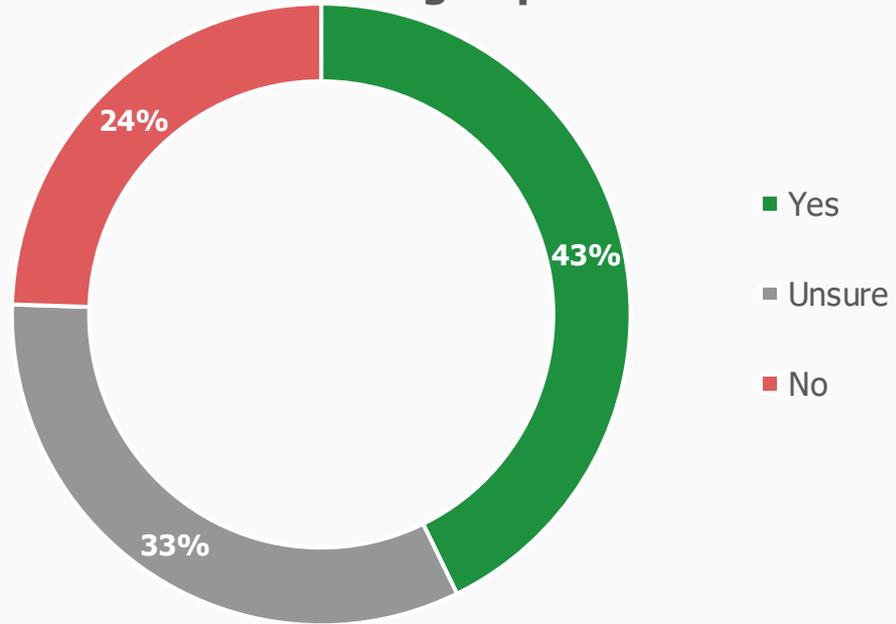
# Identify

Identify the public's perception of the demographic groups that will benefit most from the implementation of allowing college athletes to profit from their N-I-L

# Effect of N-I-L on the Competitiveness of College Sports

- One quarter (28%) of respondents tend to believe that athletes from **larger** schools will have more benefits, compared to 3% who believe that athletes from **small** schools will benefit most from the rule.

## Will a School's Ability to Secure N-I-L Agreements Hurt the Competitiveness of College Sports?



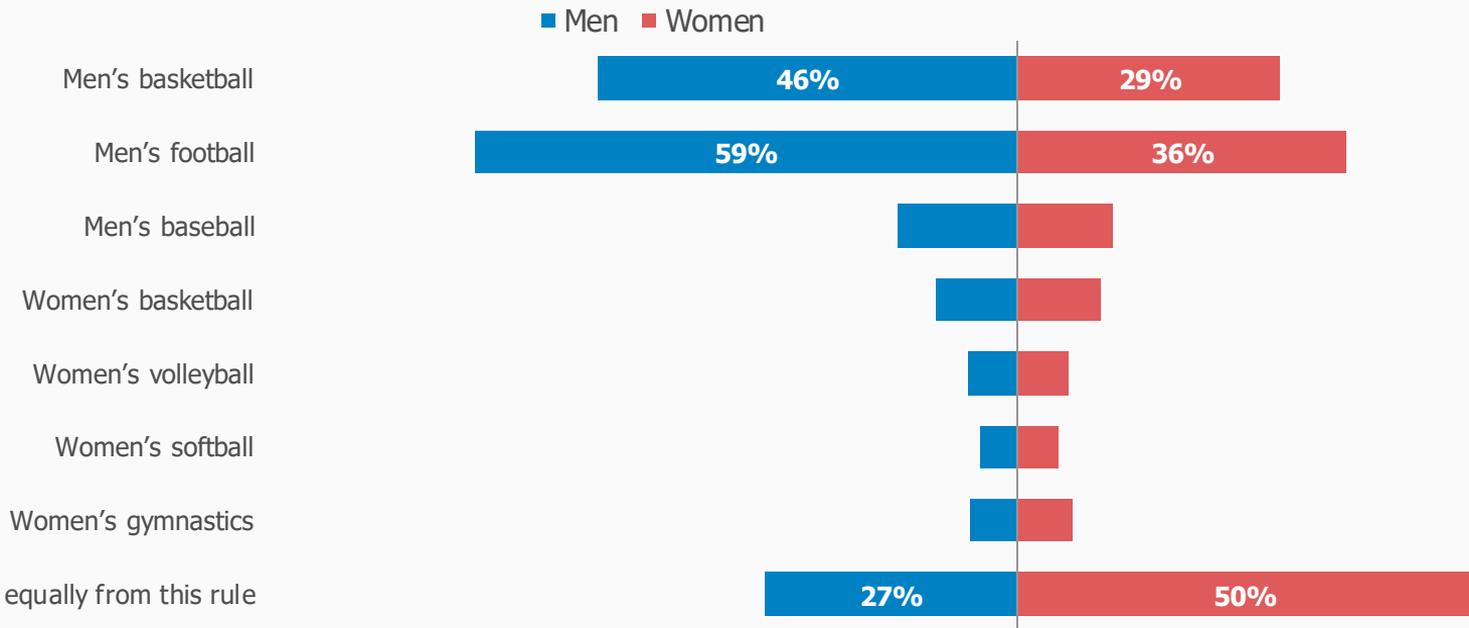
Q) Do you feel that a school's ability to help their athletes and future athletes get N-I-L agreements could hurt the competitive nature of college sports? For example, by causing a small number of schools to consistently have the best players on their teams? (n=1800)

Q) Which types of athletes, if any, do you believe will get the most benefit from the N-I-L rule? Select all that apply.

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# Men think men's basketball and men's football athletes will benefit most from the N-I-L rule, whereas women think all athletes will benefit equally

## Perceptions of Which Sports' Athletes Will Benefit Most from N-I-L by Gender

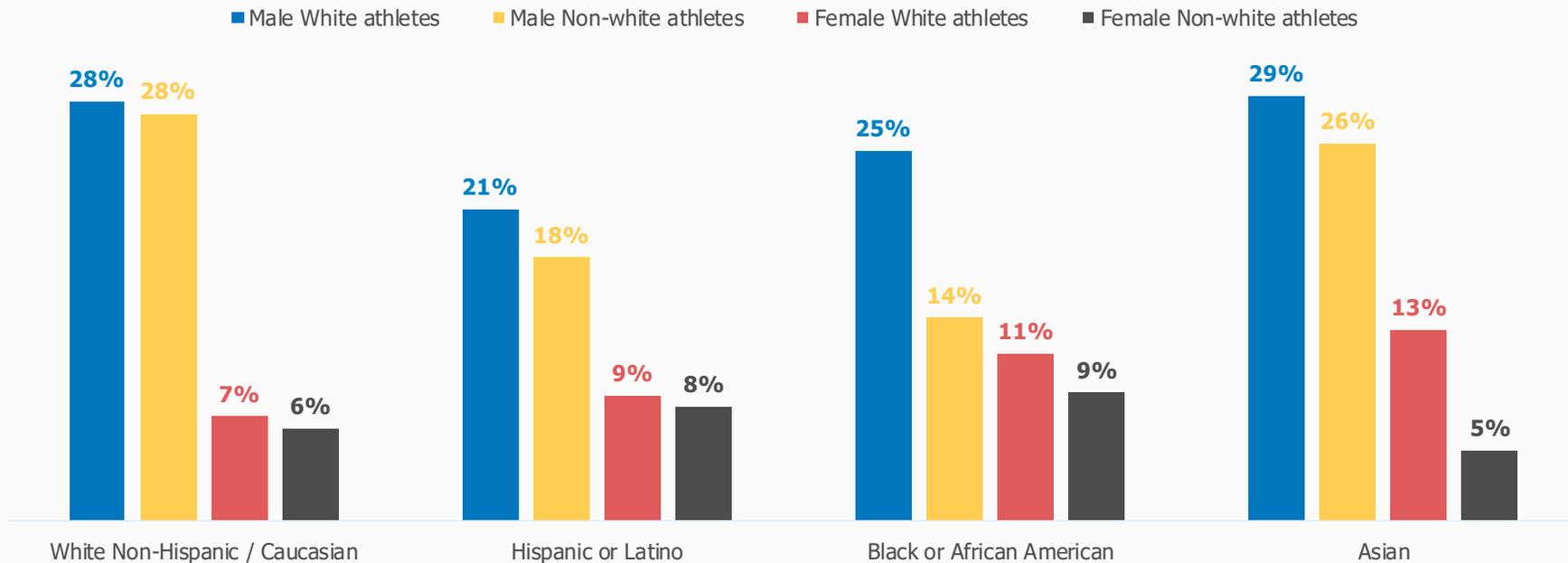


Q) Which sports' athletes, if any, do you believe will get the most benefit from the N-I-L rule? Select all that apply. (n=1800)  
Subgroup: Men (n=871), Women (n=923)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# White non-Hispanic respondents think white and non-white males will equally benefit from the N-I-L rule, but Hispanic, Asian, and particularly African American respondents feel the rule will benefit white males more than non-white males

## Perceptions of Which Types of Athletes Will Benefit Most from N-I-L by Ethnicity



Q) Which types of athletes, if any, do you believe will get the most benefit from the N-I-L rule? Select all that apply. (n=1800)

Subgroup: White non-Hispanic (n= 1132), Hispanic ( n = 295), Black or African American (n=220), Asian(n = 108)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

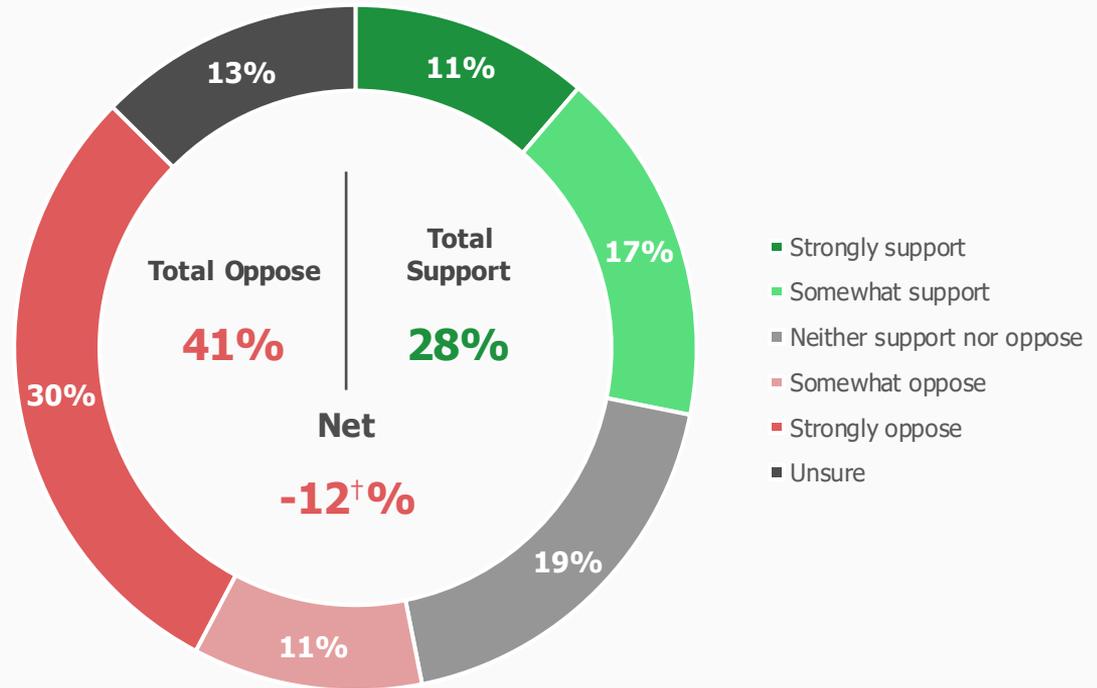
# Discover

Discover how perceptions differ between college athletes' N-I-L and high school athletes' N-I-L

## A plurality of respondents are against allowing high school athletes to profit from their N-I-L

- People are less likely to support non-adults profiting from their N-I-L
- Recall that there is a +26% margin of support for allowing college athletes to profit from their N-I-L, but -12% net opposition for high school athletes.

### Support for High School Athletes Profiting from N-I-L



Q) Up to this point of the survey, you have been asked about college athletes and the opportunity for them to make money using their N-I-L. Would you support or oppose allowing high school students to make money using their name, image, and likeness? (n=1800)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# Twice as many respondents support allowing both college and high school students to make money from their N-I-L (22%) as those who support neither (11%)

% of Total	College Students	High School Students
22%	✓	✓
20%	✓	✗
2%	✗	✓
11%	✗	✗
	.....	

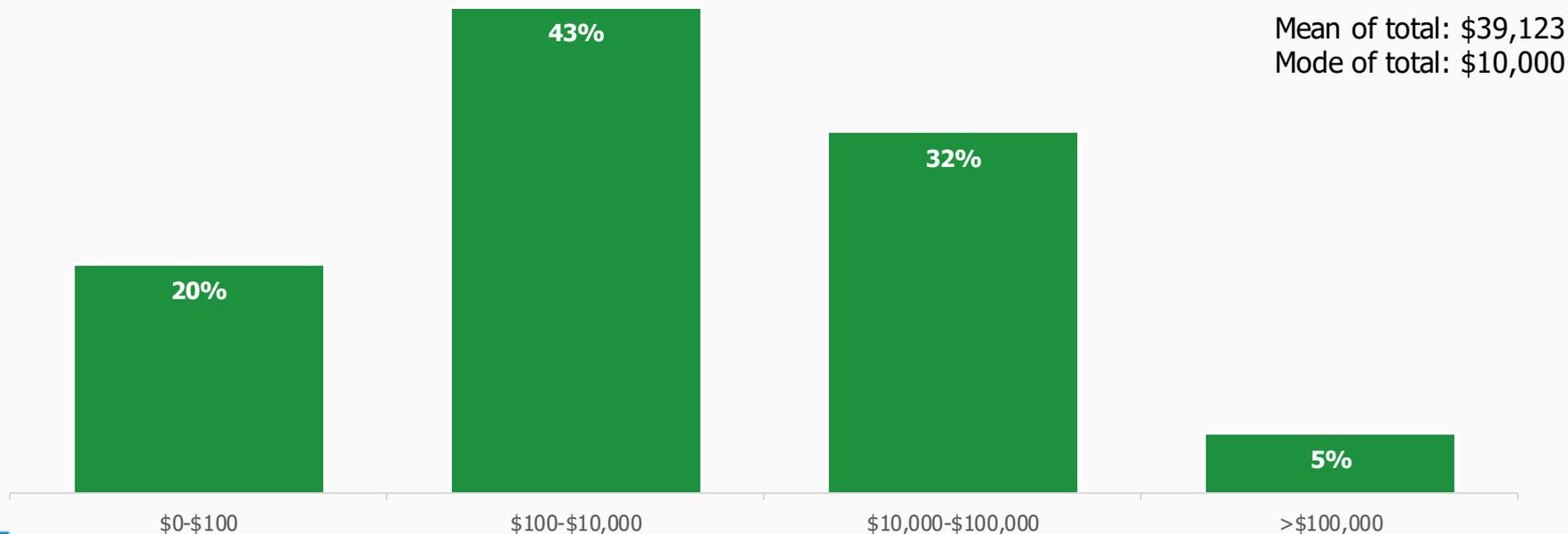
Q) Do you agree or disagree with the NCAA's decision to allow college athletes to make money from their N-I-L?

Q) Would you support or oppose allowing high school students to make money using their name, image, and likeness? (n=1800)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# The most agreed upon salary cap for high school athletes is significantly lower than that for college athletes

## Salary Cap for High School Athletes' N-I-L Agreements

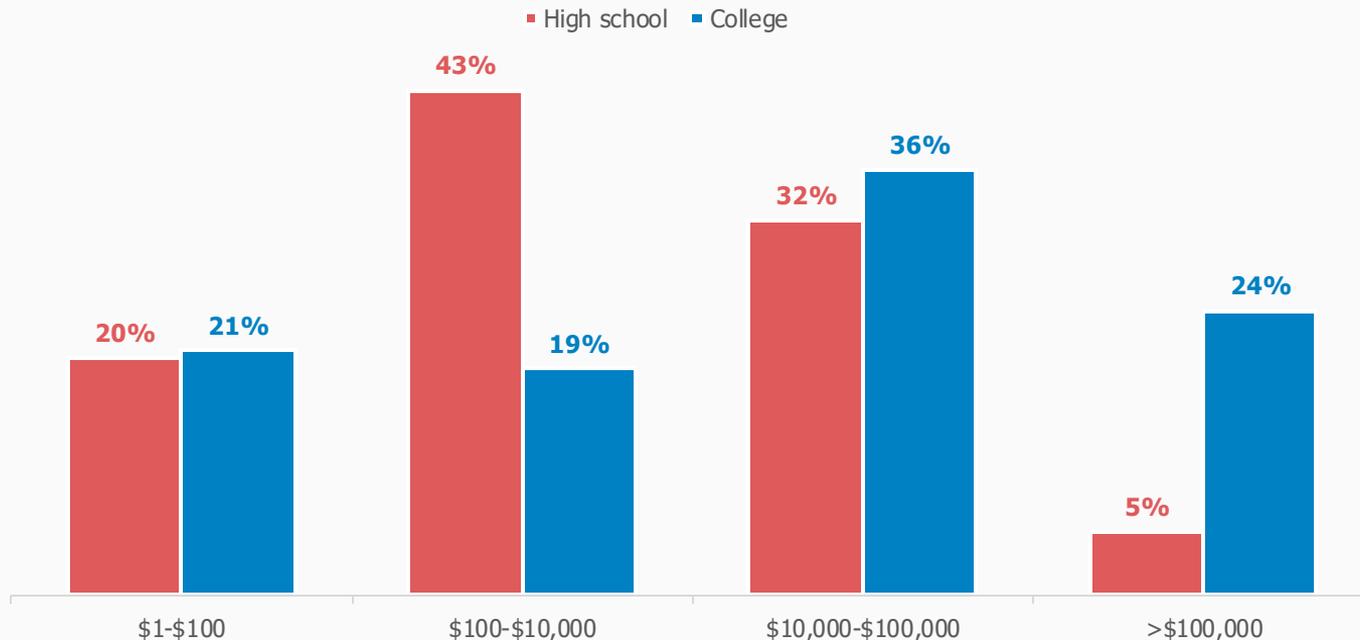


Q) What should the limit (i.e., maximum dollar amount) be that a high school athlete can make from their N-I-L during their time in high school? (n=243)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# High school athletes are expected to have a lower income ceiling than college athletes

## Difference in Salary Cap from N-I-L for College and High School Athletes



Q) What should the limit (i.e., maximum dollar amount) be that a high school athlete can make from their N-I-L during their time in high school?

Subgroup: high school (n= 243), college (n= 754)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# Methodology

# Sample Summary – United States General Population

This national survey was conducted by OH Predictive Insights between October 21st – October 28th, 2021 from a nationwide general population (18+ year old) sample. The sample size was 1,800 completed surveys, with a MoE of  $\pm 2.31\%$ . All respondents were given the option to take the survey in English or Spanish. The sample demographics accurately reflected the target population's age, gender, region and ethnicity according to population statistics derived from recent US Census data for US adults. This survey was conducted via opt-in online panel.

\*Numbers may not total 100%, due to rounding.

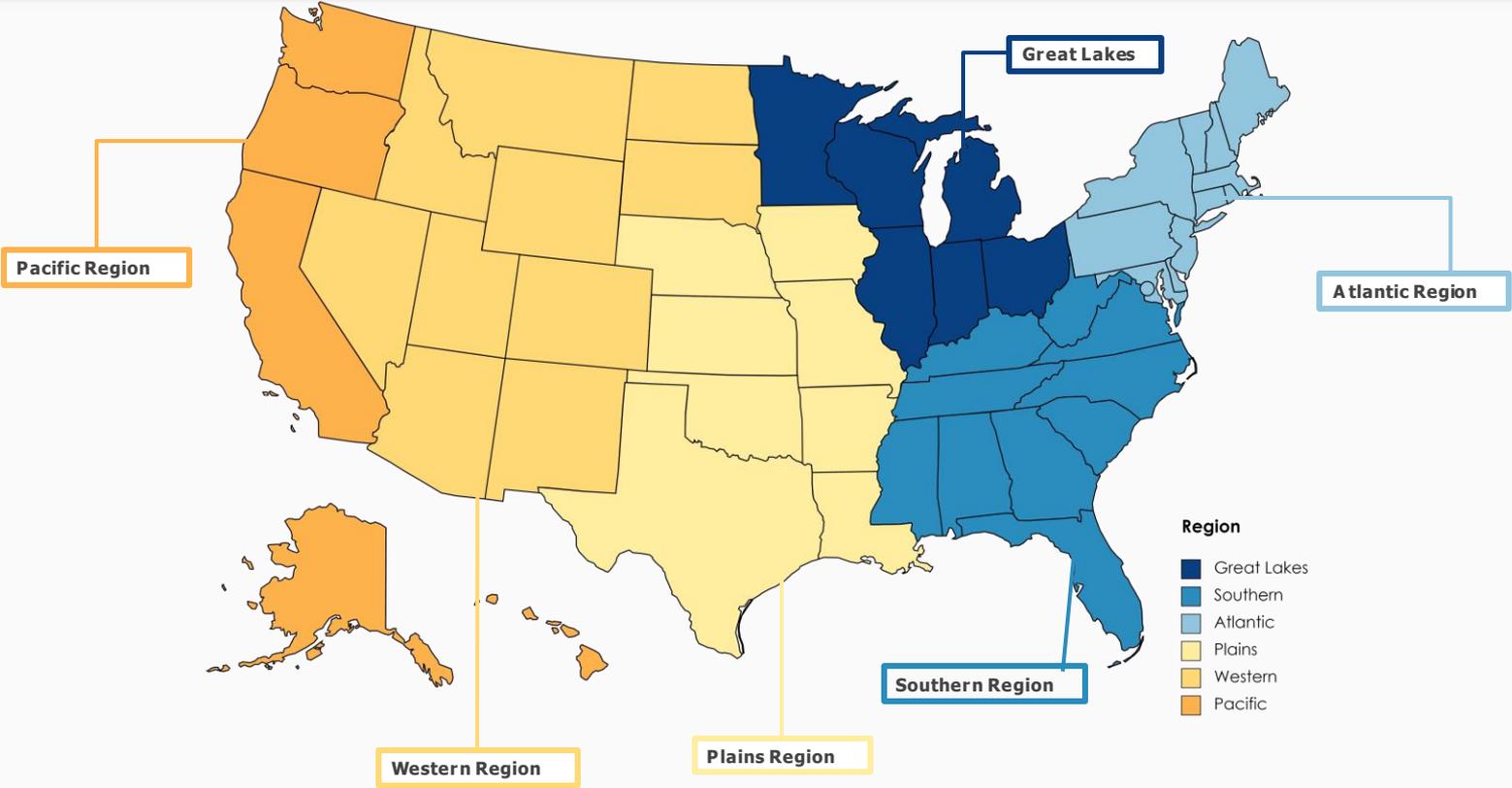
Ethnicity	
White, non-Hispanic	62.9%
Hispanic	16.4%
Black or African American	12.2%
Asian	6.0%
Additional ethnicities	2.5%

Region	
Atlantic	19.8%
Great Lakes	16.0%
Pacific	16.3%
Plains	16.2%
Southern	23.7%
Western	8.0%

Age	
18-34	29.8%
35-44	16.3%
45-54	16.0%
55-64	16.6%
65+	21.2%

Sex Assigned at Birth	
Male	48.7%
Female	51.3%

# Research Methodology – Regional



\*n=1800 nationally, 300 per region

# Research Methodology - Regional Sample Summaries

	Demographics	Atlantic	Great Lakes	Pacific	Plains	Southern	Western
<b>Sex Assigned at Birth</b>	Male	48%	49%	49%	49%	48%	50%
	Female	52%	51%	51%	51%	52%	50%
	Other	0%	NA	NA	NA	0%	0%
<b>Age</b>	18-34	29%	29%	31%	31%	29%	31%
	35-44	16%	16%	17%	17%	16%	17%
	45-54	16%	16%	16%	16%	16%	15%
	55-64	17%	17%	16%	16%	17%	16%
	65+	22%	22%	20%	19%	23%	21%
<b>Ethnicity</b>	White	65%	76%	47%	59%	64%	67%
	Hispanic	13%	7%	29%	22%	12%	21%
	African American	13%	11%	5%	12%	20%	4%
	Asian	7%	4%	15%	4%	3%	3%
	Other	2%	2%	4%	3%	2%	5%

# Key Takeaways

People are in support of allowing college athletes to profit from their N-I-L, but not so much for high school athletes. The tolerance for college athletes profiting from their N-I-L is higher than that for high school athletes.

A desired N-I-L implementation should include setting an income ceiling and tax rate for N-I-L incomes; All universities and colleges should agree to the same set of rules, and NCAA should be the entity to enforce the regulation.

African American are more favorable of college sports due to the new rules, and there will be a significant increase of sports watching by African American males. However, non-white ethnicities think white male athletes benefit more than non-white male athletes from the rule, whereas white respondents think all males, regardless of their ethnicities, will benefit equally from the new rules.



# Thank You

PHOENIX

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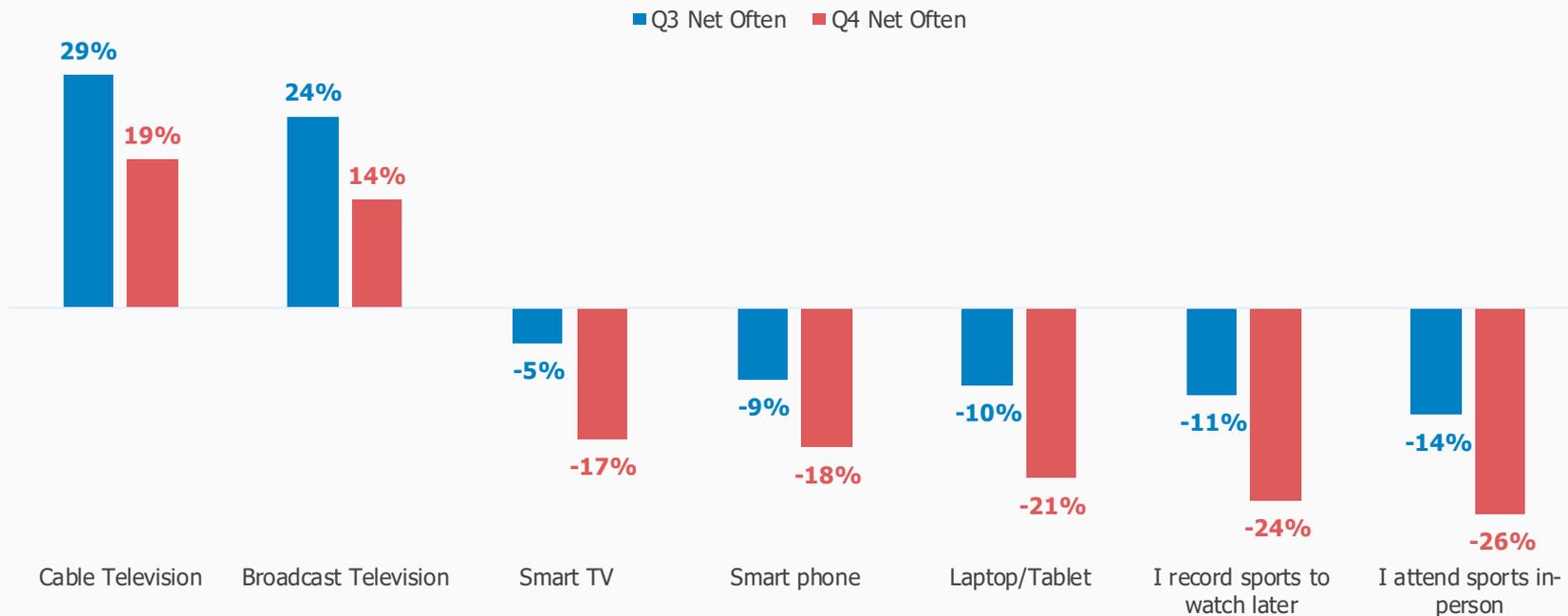
602-362-5694  
3550 N. CENTRAL AVE | STE. 1500  
PHOENIX, AZ 85012

Project Lead Analyst: Jacob Joss  
Project Manager: Haylye Plaster

# Appendix

# Watching sports on cable TV and broadcast TV remain the most popular ways of watching sports in Q4

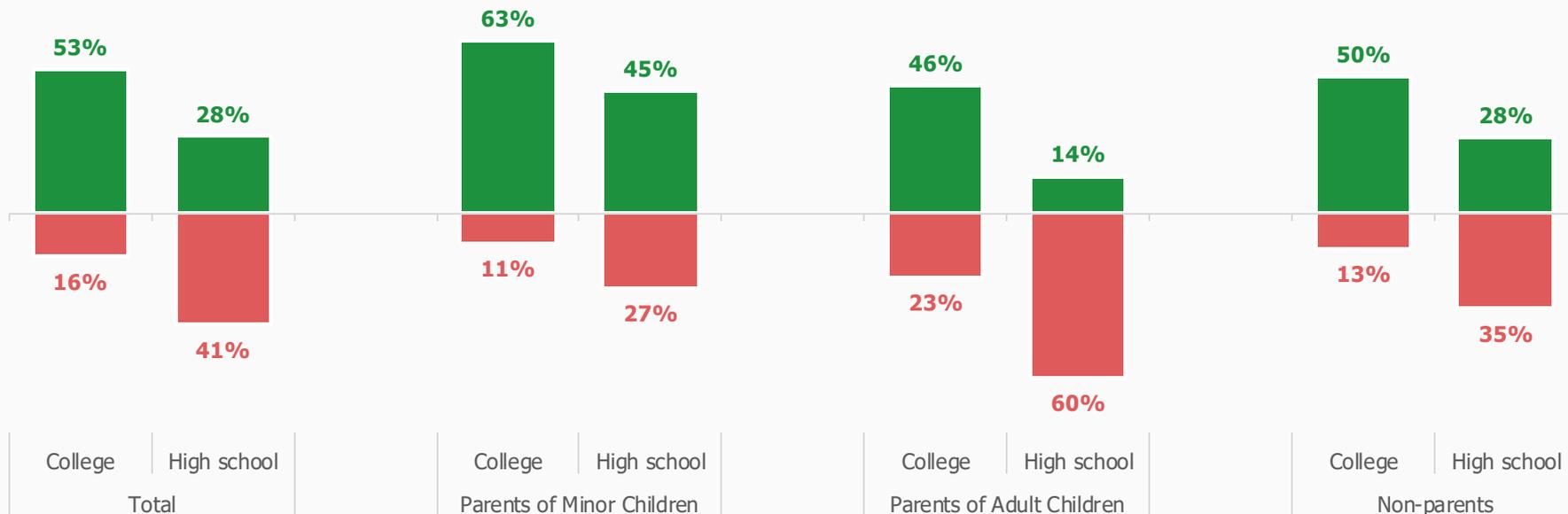
## Methods of Watching Sports



# Parents of minor children would be most likely to agree with the new rule compared to parents of adult children and non-parents

## Parents' opinion about the N-I-L rules

■ Total Agree ■ Total Disagree



Q) Do you agree or disagree with the NCAA's decision to allow college athletes to make money from their N-I-L?

Q) Up to this point of the survey, you have been asked about college athletes and the opportunity for them to make money using their N-I-L. Would you support or oppose allowing high school students to make money using their name, image, and likeness?

Subgroup: Parents of Minor Children (n=524), Parents of Adult Children (n=576), Non-parents (n=701),

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# Decomposition of College Sports Fans

## Do you have a favorite college sports team?

■ Yes ■ No



Male

35-44

Currently married

Southern region



4-year degree or more

White, Non-Hispanic

Full-time Employed

Q) If you had the ability to get tested for the Coronavirus in a drive-thru style environment, where you did not have to leave your vehicle, would be more or less likely to get tested?

Subgroup: Respondents who said 'More Likely' n= 516

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

# Decomposition of Non-College Sports fans

## Do you have a favorite college sports team?

■ Yes ■ No



Female

55-64

HHI under \$35k

Some college or less

Single never married

Atlantic region

Q) If you had the ability to get tested for the Coronavirus in a drive-thru style environment, where you did not have to leave your vehicle, would you be more or less likely to get tested?

Subgroup: Respondents who said 'More Likely' n= 516

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.