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Compliance Directors Survey

Methods

- Survey opened 9/4/19 and closed 9/24/19.
- Link sent to the person at each NCAA school listed as senior compliance administrator in the NCAA membership database. Asked for just one response per school.
- Reminder email sent midway through the survey period.
- Median time to complete the survey was less than 5 minutes.
- Survey accessed by 532 compliance administrators, with usable data for 502.

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Compliance Directors Survey Divisional Response

| Division | DI subdivision | N | Division / Subdivision Response % |
|---------------------|------------------|------------|-----------------------------------|
| Division I | (Overall) | 195 | 56% |
| | AG5 | 39 | 60% |
| | Other FBS | 38 | 58% |
| | FCS | 63 | 51% |
| | DI, no football | 55 | 57% |
| Division II | | 154 | 50% |
| Division III | | 153 | 35% |
| Total | | 502 | 46% |

Percentage of schools reporting that they provide sports wagering or gambling-related education to these groups Compliance Directors Survey

| | AG5 | Division I (total) | Division II | Division III |
|---------------------------------|------|--------------------|-------------|--------------|
| Athletics administrators | 100% | 98% | 81% | 74% |
| Coaches | 97% | 97% | 84% | 74% |
| Athletics health care providers | 97% | 81% | 49% | 33% |
| Student-athletes | 97% | 99% | 87% | 81% |
| Other | 64% | 31% | 9% | 5% |

Notes:

- Across division, "other" typically referenced FARs, faculty involved with athletics, university administrators, all athletics employees, student workers, tutors, academic advisors, boosters, team managers, parents/family, registrar/financial aid/admissions officers, and/or president/chancellor.

How often is wagering/gambling education provided? Compliance Directors Survey

- Among those schools that provide wagering-related education, there is substantial variation across NCAA division in the frequency of covering the topic:
 - Of the autonomy schools that reported providing wagering education, all said they educate student-athletes more than once per year. In total, 90% of DI, 56% of DII and 37% of DIII schools that discuss the topic with student-athletes do it more than once/year.
 - About three-quarters of DI, one-half of DII and one-third of DIII schools that provide education say they present it more than once/year to their coaches and administrators.
 - Comments from compliance directors indicate that many schools discuss in person at the start of the year and then send out reminders or discuss in meetings prior to big sporting events (e.g., March Madness, Super Bowl, football bowl games).



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Among schools that provide sports wagering or gambling-related education, what topics are covered? Compliance Directors Survey

| | AG5 | Division I (total) | Division II | Division III |
|---------------------------------------|------|--------------------|-------------|--------------|
| Sports wagering terminology | 89% | 84% | 80% | 62% |
| NCAA rules | 100% | 97% | 92% | 97% |
| Well-being (e.g., gambling addiction) | 24% | 21% | 14% | 18% |
| State and federal laws | 49% | 46% | 16% | 21% |
| Inside information policies | 89% | 62% | 20% | 17% |

Notes:

- Other topics addressed include fantasy sports, match fixing, school policies about entering a sportsbook.



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In general, how is gambling/wagering education being delivered?

Compliance Directors Survey

| | AG5 | Division I (total) | Division II | Division III |
|--|-----|--------------------|-------------|--------------|
| In-person by athletics staff | 97% | 97% | 92% | 95% |
| In-person by other campus staff | 3% | 2% | 5% | 2% |
| In-person by guests or outside experts | 19% | 6% | 2% | 2% |
| Handouts / fact sheets | 76% | 67% | 49% | 40% |
| Video | 16% | 12% | 4% | 14% |
| Online modules / courses | 16% | 11% | 13% | 5% |

Notes:

- Percentages among those schools that provide education. Many schools also mentioned email reminders and social media posts.



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Who on staff has primary responsibility for managing and administering sports wagering education resources?

Compliance Directors Survey

| | AG5 | Division I (total) | Division II | Division III |
|-----------------------|------|--------------------|-------------|--------------|
| Compliance staff | 100% | 97% | 98% | 78% |
| Director of athletics | 0% | 2% | 2% | 18% |
| Other | 0% | 1% | 0% | 4% |

Notes:

- “Other” typically referred to the senior woman administrator (SWA).



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Should NCAA student-athletes be required to complete an educational module on sports wagering / gambling at least once during their college career?

Compliance Directors Survey

| | AG5 | Division I (total) | Division II | Division III |
|-----|-----|--------------------|-------------|--------------|
| Yes | 65% | 72% | 72% | 63% |
| No | 35% | 28% | 28% | 37% |



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Has your institution / athletics department dealt with a sports wagering and/or problem gambling issue within the past year?

Compliance Directors Survey

| | AG5 | Division I (total) | Division II | Division III |
|--------------|-----|--------------------|-------------|--------------|
| Yes | 3% | 4% | 4% | 1% |
| No | 97% | 93% | 90% | 94% |
| I don't know | 0% | 3% | 6% | 5% |



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**Compared to other compliance issues for which you are responsible,
how concerned are you about sports wagering / gambling?**
Compliance Directors Survey

| | AG5 | Division I (total) | Division II | Division III |
|----------------------|-----|-----------------------|-------------|--------------|
| Extremely concerned | 11% | 4% | 3% | 1% |
| Moderately concerned | 27% | 16% | 4% | 6% |
| Somewhat concerned | 30% | 35% | 19% | 19% |
| Slightly concerned | 30% | 40% | 52% | 42% |
| Not at all concerned | 3% | 6% | 22% | 33% |

How familiar are you with the NCAA “Don’t Bet On It” campaign?
Compliance Directors Survey

| | AG5 | Division I (total) | Division II | Division III |
|-------------------|-----|-----------------------|-------------|--------------|
| Very familiar | 78% | 75% | 44% | 25% |
| Familiar | 22% | 24% | 44% | 49% |
| Slightly familiar | 0% | 2% | 9% | 17% |
| Not familiar | 0% | 0% | 3% | 8% |

If the NCAA national office was to provide educational resources on sports wagering / gambling, how likely would you be to use them?
Compliance Directors Survey

| | AG5 | Division I (total) | Division II | Division III |
|---------------|-----|--------------------|-------------|--------------|
| Very likely | 42% | 53% | 50% | 33% |
| Likely | 44% | 37% | 40% | 43% |
| Not sure | 14% | 9% | 8% | 20% |
| Unlikely | 0% | 1% | 1% | 3% |
| Very unlikely | 0% | 1% | 0% | 2% |



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For which of the following topics would you be most likely to use NCAA-provided educational resources?
Compliance Directors Survey

| | AG5 | Division I (total) | Division II | Division III |
|---|-----|--------------------|-------------|--------------|
| Sports wagering terminology | 76% | 84% | 88% | 80% |
| NCAA sports wagering rules | 89% | 85% | 87% | 87% |
| Well-being – Prevention of gambling disorder | 60% | 54% | 43% | 38% |
| Well-being – Intervention with problem gambling | 51% | 44% | 29% | 29% |
| Primer on state and federal wagering laws | 60% | 61% | 39% | 29% |
| How to avoid providing inside information | 92% | 81% | 40% | 21% |

Notes:

- Other topics mentioned: Lists of fantasy sites and other online gambling options that violate NCAA rules; mental health resources for student-athletes experiencing anxiety/depression due to ridicule from gamblers on social media.



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Describe successes and challenges encountered in providing sports wagering education

Compliance Directors Survey

- Few success stories were shared in the survey comments. A host of challenges were described, primarily centered on the following themes:
 - SAs and coaches/staff see no harm in pro sports betting (especially fantasy participation) or March Madness bracket contests. Makes education challenging because the recipients do not take that part of the NCAA prohibition seriously and often tune out educational presentations at that point. Difficult to get buy-in. The scope of NCAA rules is perceived to be too broad relative to current societal norms.
 - Very difficult to monitor wagering behaviors.
 - Given all of the other important compliance issues to be covered in preseason meetings, it is difficult to prioritize sports wagering education.
 - Mental health-related issues (e.g., addiction) are important, but compliance staff lack the time, resources and expertise to discuss.



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Summary of comments on how the NCAA can assist with sports wagering education

Compliance Directors Survey

- Many ways in which the NCAA can help, but it will require modernizing educational materials and producing relevant/concise video content that is updated frequently. Real-life examples and description of enforcement cases seen as helpful.
- A number of compliance administrators questioned the NCAA's stance on fantasy and low-stakes pro sports wagering. Strong sentiment that in the current climate, NCAA rules should focus on college sports wagering and providing inside information. Current rules seen as negatively impacting the credibility of any education provided.
- Educational materials used in DI may not be appropriate for DII or DIII schools.
- Some support for use of an online module (pre-college or in-college) that can be tracked. May be more appropriate for coaches and staff.
- Education might be more impactful if coming from a source besides the NCAA or compliance office (e.g., coaching associations).
- Can build off "Don't Bet On It," but needs refreshing and more resources.



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