Alumni Opinion Survey Overview January 2014

The Penn State Alumni Association routinely surveys alumni to better understand their views and opinions on a variety of issues about Penn State, membership, and current events, and to benchmark historical trends in alumni attitudes.

Our most recent national alumni opinion survey was conducted November to December 2012 by StrategyOne, following up a survey conducted by the same company in May 2012. Given the unique circumstances facing the University and the Alumni Association during the last two years, we decided to commission a one-year update to our national survey. Research for this update was conducted in December 2013, also by StrategyOne.

The December 2013 survey results show that the University's core reputation metrics have either held steady or improved over the last year. Notably, Penn State's Net Promoter Score (+59) has significantly increased since last year (+48), as has the number of alumni who say they feel positively toward the University (86% vs. 81%).

Other findings include:

- 74% of alumni believe Penn State is headed in the right direction, while 6% say it is on the wrong track.
- When asked how Penn State has handled the events of the last year, 29% say all or most of the actions were right, 20% say all or most actions were wrong, and 51% say it was mixed.
- Nearly half (49%) of alumni say they are following news about Penn State's academic rankings and ratings very closely.
- When asked what the top priorities for Penn State's new president should be, the top volunteered responses include academics, building the University's reputation, and affordability.

Methodology

The survey was conducted December 4-15, 2013, using a mixed-mode data gathering. The Alumni Association provided a sample of 10,000 records, selected at random from among all alumni for whom a telephone number and/or email address was available. A total of 1,297 respondents completed the survey, with 993 completing it online and 304 on the phone. The margin of error is \pm 2.72% in 95 out of 100 cases.

About the Penn State Alumni Association

The Penn State Alumni Association is the largest dues paying alumni association in the world with more than 172,000 members. Established in 1870, the Alumni Association's mission is to connect alumni to the University and to each other, provide valued services to members, and to support Penn State's mission of teaching, research and service. For more information, visit our website at www.alumni.psu.edu.

About StrategyOne Inc.

StrategyOne is an insights-driven strategic consulting firm owned by DJE Holdings, Inc. StrategyOne provides evidence-based stakeholder insights, analysis and media measurement to corporate, organizational and governmental clients globally. The firm specializes in reputation, branding and communications research.

Penn State Alumni Association National Alumni Survey

Methodology: StrategyOne was commissioned by the Penn State Alumni Association to conduct a survey of alumni. The survey was conducted December 4-15, 2013, using a mixed-mode data gathering. The Association provided a sample of 10,000 records, selected at random from among all alumni for whom a telephone number and/or email address was available. A total of 1,297 respondents completed the survey, with 993 completing it online and 304 on the phone. The margin of error is + 2.72% in 95 out of 100 cases.

StrategyOne conducted the previous survey wave November 28-December 11, 2012, using the same methodology. A total of 1,172 respondents completed the survey (672 online, 500 via telephone).

StrategyOne conducted the initial survey wave May 8-20, 2012, using the same methodology. A total of 1,282 respondents completed the survey (779 online, 553 via telephone).

An asterisk (*) indicates less than 1%. Totals may not equal 100 due to rounding.

Question 1

First, how satisfied are you with the experience you had as a student at Penn State? Overall, would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with your experience as a student at Penn State?

	iviay	Dec	Dec
	<u>2012</u>	<u>2012</u>	2013
TOTAL SATISFIED	97%	95%	98%
TOTAL DISSATISFIED	2%	3%	2%
Very satisfied	78%	76%	79%
Somewhat satisfied	19%	20%	19%
Somewhat dissatisfied	1%	2%	1%
Very dissatisfied	1%	1%	*
Neither satisfied or dissatisfied	*	*	*
Don't know/no answer	*	*	*

Question 2

And, how would you describe your overall feelings toward Penn State today - very positive, somewhat positive, neutral, somewhat negative, or very negative?

	May	Dec	<u>Dec</u>
	<u>2012</u>	2012	2013
TOTAL POSITIVE	82%	81%	86%
TOTAL NEGATIVE	10%	10%	8%
Very positive	47%	50%	57%
Somewhat positive	35%	31%	29%
Somewhat negative	8%	7%	6%
Very negative	3%	3%	2%
Neutral	7%	8%	6%
Don't know	1%	*	*

Question 3

Now, I'd like to ask about some other feelings, and for each one, please tell me if you feel it a great deal, a fair bit, only a little, or not much at all.

[The order of the four statements was randomized.]

Pride in your Penn State degree

	iviay	Dec	Dec
	<u>2012</u>	<u>2012</u>	2013
TOTAL GREAT DEAL/FAIR BIT	95%	94%	95%
TOTAL LITTLE/NOT MUCH AT ALL	5%	6%	5%
A great deal	76%	74%	78%
A fair bit	20%	20%	17%
Only a little	4%	4%	4%
Not much at all	1%	2%	1%

Max



A sense that Penn State is part of who you are

	May	Dec	<u>Dec</u>
	<u>2012</u>	<u>2012</u>	<u>2013</u>
TOTAL GREAT DEAL/FAIR BIT	82%	79%	83%
TOTAL LITTLE/NOT MUCH AT ALL	18%	21%	17%
A great deal	55%	52%	59%
A fair bit	27%	26%	24%
Only a little	14%	14%	12%
Not much at all	5%	7%	5%
An emotional connection to Penn State			
	May	Dec	Dec
TOTAL OREAT REAL /FAIR RIT	<u>2012</u>	<u>2012</u>	<u>2013</u>
TOTAL GREAT DEAL/FAIR BIT	83%	80%	83%
TOTAL LITTLE/NOT MUCH AT ALL	17%	20%	17%
A great deal A fair bit	58% 25%	53% 27%	57% 26%
Only a little	12%	13%	11%
Not much at all	5%	6%	6%
Not much at all	370	078	070
A feeling that you are still part of the Penn State community			
	May	Dec	Dec
	2012	2012	2013
TOTAL GREAT DEAL/FAIR BIT	70%	68%	71%
TOTAL LITTLE/NOT MUCH AT ALL	30%	32%	29%
A great deal	35%	39%	40%
A fair bit	34%	29%	31%
Only a little	20%	21%	19%
Not much at all	10%	11%	10%

Question 4

On a scale of 0-10 - where 0 is not at all likely and 10 is extremely likely - how likely would you be to recommend Penn State to a prospective undergraduate of your own interests and background?

	May <u>2012</u>	Dec 2012	<u>Dec</u> 2013
9-10 (PROMOTERS)	63%	63%	69%
7-8 (PASSIVES)	24%	22%	19%
0-6 (DETRACTORS)	13%	15%	10%
10 - VERY LIKELY	48%	49%	54%
9	15%	14%	16%
8	16%	15%	13%
7	8%	7%	6%
6	4%	3%	3%
5	4%	6%	3%
4	1%	1%	2%
3	1%	2%	1%
2	1%	1%	1%
1	1%	*	*
0 - NOT AT ALL LIKELY	*	1%	1%
Don't know/not sure	0%	0%	1%

Question 5

All in all, would you say Penn State as an institution is going in the right direction, or is off on the wrong track?

	<u>Dec</u>
	<u>2013</u>
TOTAL RIGHT DIRECTION	74%
TOTAL WRONG TRACK	6%
Completely right direction	16%
Mostly right direction	58%
Mostly wrong track	5%
Completely wrong track	2%
Mixed	12%
Don't know/not sure	7%



Question 6

Being as specific as possible, what are some of the reasons you indicated Penn State is [going in the right direction/off on the wrong track].

[Open-ended question; Results shown off total base]

	Dec
DICHT DIRECTION	<u>2013</u>
-RIGHT DIRECTION-	70%
ACADEMICS Academics (quality advection (general)	40%
Academics/quality education (general)	21% 6%
Focus on academics not athletics/emphasis on academics/proving they're more than football	070
Diverse curriculum/diverse educational opportunities/online courses	5%
Focus on the student/concern for students education/student centered	4%
Employers look for Penn State grads/companies think highly of their students/quality of	4%
graduates	470
High ranking academics/high academic standards/high standards of excellence/national	3%
ranking	370
Professors/great professors	3%
HANDLING OF SCANDAL	24%
Changing after Sandusky incident/moving forward/fixing things/rebuilding image	17%
Addressed the issue/took responsibility/handled Sandusky incident well (general)	5%
New leadership/firing and hiring/improved leadership	4%
School shouldn't have been punished for the scandal/unjustly penalized	*
SCHOOL FOCUS	16%
Research/focus on research/best research institution	7%
Buildings/building new facilities/expanding campus	3%
Strong school spirit/sense of community	2%
THON/good dealings with THON	1%
Community involvement/reaching out across the state/giving back to community	1%
Child protection/addressing child abuse and intervention	1%
Technology/keeping up with technology	1%
OTHER POSITIVE MENTIONS	10%
Right direction/doing things right (general)	7%
Proud to have graduated from Penn State/proud to have child attend	2%
Transparency/fostering openness	1%
-WRONG TRACK-	32%
BOARD OF TRUSTEES CONCERNS	19%
Dislike how they handled the Sandusky scandal/poorly handled the Sandusky scandal	7%
Leadership concerns/lack of leadership/mismanaged	4%
Board of trustees concerns/low opinion of the Board of Trustees (general)	4%
Lack of transparency/too secretive/should be transparent	2%
Only concerned about money/spending money unwisely Accepting NCAA sanctions/BoT let the NCAA dictate their actions	2% 2%
BoT needs to be reorganized/Mr. Erickson needs to be replaced/board of trustees needs	2%
to be replaced	270
Don't have the best interest of the University in mind	2%
Freeh Report/accepting the Freeh Report	1%
OTHER NEGATIVE MENTIONS	14%
Not up to date/unsure where Penn State is going/don't keep up with it	5%
High cost of tuition/tuition costs are becoming too high/increasing tuition costs	4%
Wrong track/feel negatively (general)	2%
Football focus/too much focus on football and not academics	2%
Embarrassed to be associated with Penn State/don't want to admit attendance there	1%
JOE PATERNO TREATMENT CONCERNS	6%
Treatment of Joe Paterno (general)	4%
Firing of Joe Paterno/disappointed how they handled firing Joe Paterno/firing over the	2%
phone	
Statue being removed/shouldn't have removed Joe Paterno statue	1%
Other	1%
None/nothing	1%
Don't know	1%
Refused	2%



Question 7

Phone: Before this call, when was the last time you mentioned Penn State in a conversation? Online: Before today, when was the last time you mentioned Penn State in a conversation?

	May <u>2012</u>	Dec 2012	<u>Dec</u> 2013
TOTAL EARLIER TODAY OR YESTERDAY/WITHIN THE PAST WEEK	77%	76%	81%
TOTAL WITHIN THE PAST MONTH/MORE THAN A MONTH AGO	22%	21%	17%
Earlier today or yesterday	34%	38%	33%
Within the past week	43%	38%	48%
Within the past month	16%	16%	11%
More than a month ago	6%	6%	6%
Don't know/not sure	1%	3%	2%

Question 8

Were your comments about Penn State mostly favorable or mostly unfavorable?

	May	Dec	Dec
	<u>2012</u>	2012	2013
TOTAL FAVORABLE	86%	85%	88%
TOTAL UNFAVORABLE	6%	5%	4%
Completely favorable	40%	40%	47%
Mostly favorable	47%	45%	41%
Mostly unfavorable	5%	4%	3%
Completely unfavorable	1%	1%	1%
Mixed	6%	8%	7%
Not all/don't know/not sure	2%	1%	2%

Question 9

Which of the following statements best reflects your overall opinion and perceptions of Penn State?

	May <u>2012</u>	Dec <u>2012</u>	<u>Dec</u> 2013
TOTAL SPEAK HIGHLY	83%	84%	85%
TOTAL CRITICAL	6%	7%	6%
I would speak highly of the University without being asked	51%	47%	54%
I would speak highly of the University if someone asked my opinion	32%	36%	31%
I would be critical of the University if someone asked my opinion	5%	6%	5%
I would be critical of the University without being asked	2%	1%	1%
I have a neutral opinion of the University	10%	8%	8%
I don't know enough about the University to have a strong opinion	1%	1%	1%



Question 10A
What would you say positively about Penn State?
[Open-ended question asked of total speak highly in Question 9, N=1,101; Results shown off total base]

	May	Dec	Dec
ACADEMICS/FACULTY	<u>2012</u> 53%	<u>2012</u> 58%	<u>2013</u> 55%
Education/higher education/great education/quality education/academic leader	41%	42%	43%
Variety of degrees/good programs	9%	17%	8%
Faculty/staff	9%	10%	7%
Research leader/research facilities/quality research	3%	2%	2%
Students are sought after by employers/highly regarded by employers	0%	0%	2%
OTHER MENTIONS	23%	20%	30%
Positive feelings/I like Penn State/positive past experience (general)	13%	4%	9%
I attended Penn State		6% 6%	9%
Provides networking opportunities/alumni networking I am where I am today because of Penn State	4% 3%	3%	5% 2%
Price/tuition/affordable	3%	2%	3%
Provides great opportunities/many opportunities	0%	0%	4%
THON/THON fundraiser	0%	0%	1%
Handled Sandusky scandal well	0%	0%	1%
FACILITIES/CAMPUS	17%	17%	18%
Community/town/supportive community	9%	9%	6%
Attractive campus/beautiful campus	7%	3%	6%
Appealing environment/campus environment	0% 2%	4% 2%	4% 1%
Facilities/top notch facilities Location	2% 1%	2% 1%	1%
Safe/safe campus	0%	0%	2%
STUDENT BODY/ATMOSPHERE	10%	12%	14%
Student body/students	4%	8%	6%
Family-like atmosphere	3%	2%	2%
Diversity among students	1%	2%	1%
Small college feel/small school feel/small classroom size	2%	1%	1%
Fun place/fun student life/good student life	0%	0%	2%
Atmosphere (general) SPORTS/SOCIAL OPPORTUNITIES	0% 13%	0% 14%	2% 8%
Extracurricular activities/clubs/social activities	8%	8%	6 %
Sports/football/volleyball/wrestling	6%	7%	5%
TRADITION/REPUTATION	11%	11%	8%
Tradition/focus on tradition/pride	6%	8%	3%
Respected University/prestigious/strong reputation	6%	3%	5%
Other	2%	1%	1%
None/nothing	*	1%	*
Don't know		*	
Refused	1%	1%	2%
Question 10B			
What is keeping you from speaking highly of Penn State?			
[Open-ended question asked of neutral in Question 9, N=103; Results shown off total base]		Dan	D
	May 2012	Dec 2012	<u>Dec</u> 2013
Paterno/Sandusky scandal/recent events	5%	3%	2%
Board of Trustees/dishonest BoT	1%	1%	1%
Limited education/quality of education	1%	2%	*
Cost/tuition	1%	1%	1%
Personal experiences/my experience when I went there (nonspecific)	1%	1%	1%
Faculty/staff/biased faculty/dishonest faculty	1%	*	*
The way Penn State handled the child abuse scandal/handled it poorly	0%	1%	1%
Focus on sports/football more important than anything	1%	1%	*
Haven't associated with them for a long time	0%	1%	1%
Size of classes/class body Policies (nonspecific)	1% *	*	0%
Lack of job placement	0%	0%	*
Other	*	*	*
None/nothing	*	*	*
Don't know	*	0%	0%
Refused	*	1%	1%



Question 10C

What is causing you to be critical of Penn State?

[Open-ended question asked of total critical in Question 9, N=83; Results shown off total base]

	May	Dec	<u>Dec</u>
SCANDAL/PATERNO	<u>2012</u> 6%	<u>2012</u> 5%	<u>2013</u> 5%
Board of Trustees	3%	2%	3%
Sandusky scandal/cover-up/child abuse allegations	2%	4%	1%
Paterno firing/handling of Paterno firing	3%	1%	1%
Senior leadership/Spanier/Curley/Schultz/McQueary/Erickson	*	2%	1%
Recent events (non specific)	*	*	*
OTHER MENTIONS	1%	2%	1%
Cost/tuition	1%	*	*
Big business feel rather than education system	*	1%	0%
Focus on sports	*	*	*
Too big/large class sizes	*	*	*
Lack of job placement	0%	*	*
Other	*	*	*
None/nothing	0%	0%	0%
Don't know	0%	0%	0%
Refused	0%	*	1%

Question 11

Would you say Penn State has more integrity, less integrity, or the same amount of integrity as other colleges and universities in the nation?

	way	Dec	<u>Dec</u>
	<u>2012</u>	<u>2012</u>	2013
More integrity	37%	36%	43%
Less integrity	10%	14%	11%
About the same	53%	50%	45%

Question 12

How likely are you to donate to Penn State in the coming years?

	May 2012	Dec 2012	<u>Dec</u> 2013
TOTAL LIKELY	57%	55%	58%
TOTAL UNLIKELY	34%	31%	33%
Very likely	30%	30%	31%
Somewhat likely	28%	25%	27%
Somewhat unlikely	16%	12%	14%
Very unlikely	18%	19%	19%
Don't know/not sure	8%	14%	9%



Question 13

Using a 0-10 scale where 0 is not following at all and 10 is following very closely, how closely have you been following each of the following?

[Items tested in random order]

The search for the new Penn State president

8-10 5-7 0-4	<u>Dec</u> <u>2013</u> 27% 28% 44%
10 - VERY CLOSELY	10%
9	8%
8	10%
7	8%
6	8%
5	12%
4	5%
3	6%
2	6%
1	6%
0 - NOT FOLLOWING	21%
Don't know/not sure	1%
Mean	4.7

Penn State football season

	2042	2042
	<u>2012</u>	<u>2013</u>
8-10	66%	67%
5-7	17%	16%
0-4	17%	16%
10 - VERY CLOSELY	44%	42%
9	12%	12%
8	10%	13%
7	6%	7%
6	4%	3%
5	6%	6%
4	2%	2%
3	2%	2%
2	3%	3%
1	3%	3%
0 - NOT FOLLOWING	7%	6%
Don't know/not sure	0%	1%
Mean	7.5	7.6

Implementation of the Freeh Report recommendations 2012: The release of the Freeh Report

	Dec	Dec
	<u>2012</u>	2013
8-10	56%	35%
5-7	25%	27%
0-4	19%	36%
10 - VERY CLOSELY	33%	16%
9	11%	8%
8	13%	11%
7	9%	8%
6	6%	7%
5	10%	11%
4	3%	5%
3	4%	4%
2	3%	5%
1	2%	5%
0 - NOT FOLLOWING	8%	17%
Don't know/not sure	0%	2%
Mean	7.0	5.4



Dec

Dec

Dec

Dec

Dec

Legal proceedings involving Graham Spanier, Gary Schultz and Tim Curley 2012: Charges filed against Graham Spanier, Gary Schultz and Tim Curley

8-10	Dec <u>2012</u> 55%	<u>Dec</u> 2013 40%
5-7	27%	28%
0-4	18%	31%
10 - VERY CLOSELY	29%	19%
9	10%	10%
8	16%	11%
7	11%	9%
6	7%	8%
5	10%	10%
4	4%	6%
3	4%	6%
2	3%	6%
1	2%	4%
0 - NOT FOLLOWING	4%	9%
Don't know/not sure	0%	1%
Mean	7.1	6.0

Various lawsuits associated with the NCAA sanctions 2012: NCAA sanctions against Penn State

	<u>2012</u>	2013
8-10	67%	44%
5-7	21%	28%
0-4	12%	27%
10 - VERY CLOSELY	40%	20%
9	12%	11%
8	15%	13%
7	8%	12%
6	5%	7%
5	7%	9%
4	2%	4%
3	2%	5%
2	2%	5%
1	2%	5%
0 - NOT FOLLOWING	3%	8%
Don't know/not sure	0%	1%
Mean	7.8	6.2

THON - the annual dance marathon to raise funds for the fight against pediatric cancer

	<u>2013</u>
8-10	37%
5-7	24%
0-4	37%
10 - VERY CLOSELY	19%
9	10%
8	9%
7	8%
6	7%
5	10%
4	4%
3	4%
2	5%
1	5%
0 - NOT FOLLOWING	19%
Don't know/not sure	2%
Mean	5.4



Dec

Dec

Penn State Board of Trustees meetings

	<u>2013</u>
8-10	25%
5-7	22%
0-4	52%
10 - VERY CLOSELY	10%
9	6%
8	9%
7	7%
6	7%
5	8%
4	5%
3	7%
2	6%
1	8%
0 - NOT FOLLOWING	26%
Don't know/not sure	1%
Mean	4.2

News about Penn State's academic rankings and ratings

	2013
8-10	49%
5-7	30%
0-4	20%
10 - VERY CLOSELY	19%
9	13%
8	16%
7	12%
6	7%
5	11%
4	3%
3	4%
2	3%
1	2%
0 - NOT FOLLOWING	8%
Don't know/not sure	1%
Mean	6.6

Penn State's current fundraising campaign - For the Future: The Campaign for Penn State Students

	<u>Dec</u> 2013
8-10	14%
5-7	27%
0-4	57%
10 - VERY CLOSELY	4%
9	5%
8	6%
7	7%
6	6%
5	13%
4	5%
3	6%
2	7%
1	7%
0 - NOT FOLLOWING	33%
Don't know/not sure	2%
Mean	3.5



Question 14
In your view, what should the top priorities be for the new president of Penn State?
[Open-ended question; Results shown off total base]

[Open-ended question; Results snown on total base]	
	<u>Dec</u>
	<u>2013</u>
ACADEMICS/SCHOOL FOCUS	45%
Academic excellence/maintain status as top academic facility/academic standards	17%
Focus on academics/priority should be academics/less emphasis on sports	14%
Academics/education (general)	8%
Focus on the students/student centered	7%
Research/focus on research	5%
Athletic focus/continue to focus on sports	3%
Undergraduate education	1%
RESTORING REPUTATION/MOVING FORWARD	40%
Reestablish reputation/get our reputation back/rebuilding school image (general)	19%
Moving forward/move past the Sandusky scandal	8%
Restore Paterno's reputation/reestablish the legacy of Joe Paterno/put statue back	6%
Alumni relations/encourage alumni involvement and donations/repair relations with alumni	5%
Restructure Board of Trustees/remove the current BoT	3%
Clean house/make changes (general)	3%
ETHICS/CHARACTER OF LEADERSHIP	21%
Integrity/maintain integrity/get integrity back	12%
Transparency/open communications/honesty	9%
Ethics/ethical leadership	3%
TUITION/FUNDING	14%
Lowering tuition/keeping costs affordable/minimize tuition increase	11%
Funding/improve funding (general)	2%
Money for research/funds for research	1%
Funds to those who need it/scholarships to students	1%
ADDRESSING SCANDAL	9%
Stand up to NCAA/reject the NCAA actions/have NCAA drop sanctions	4%
Addressing issues/answer questions about the Sandusky scandal	3%
Reject Freeh Report/fight Freeh Report	1%
Ensure another scandal won't happen/make sure it doesn't happen again	1%
OTHER MENTIONS	8%
Get the best professors/bring in quality professors	4%
Recruit top notch students/recruit bright students	2%
Safety/make the school a safe environment	2%
True leader	1%
Other	1%
None/nothing	4%
Don't know	4%
Refused	1%
*********	170



Question 15

Who or what do you rely on for news and information about Penn State? [Open-ended question; Results shown off total base]

	May 2012	Dec 2012	<u>Dec</u> 2013
GENERAL MENTIONS	93%	90%	88%
Internet/online (nonspecific)	38%	36%	22%
News/national news/local news/media (non-specific)	37%	34%	20%
Newspaper (nonspecific)	28%	30%	21%
Alumni Association (mailings/email/materials etc.)	20%	14%	26%
Word of mouth/friends/family/fellow alumni	20%	17%	18%
Email (nonspecific)	13%	7%	13%
Television (nonspecific)	8%	18%	8%
Social media/Facebook/Twitter	8%	7%	11%
Newsletters (nonspecific)	5%	3%	6%
Radio (nonspecific)	3%	5%	2%
Football letter/football message board	0%	0%	4%
All/everything (general)	0%	2%	2%
Google/Yahoo Googl	0%	0%	3%
SPECIFIC SOURCE MENTIONS	32%	27%	38%
The Penn Stater	10%	3%	9%
Centre Daily Times/CDT	6%	4%	7%
Psu.edu Psu.edu	7%	2%	7%
Daily Collegian	5%	5%	6%
ESPN	3%	6%	4%
CNN.com	0%	6%	4%
New York Times/NYT	2%	4%	2%
Penn State Live	3%	2%	3%
Penn State Newswire	2%	1%	4%
Harrisburg Patriot News	2%	2%	2%
Wall Street Journal	1%	1%	2%
Onward State	0%	0%	4%
Blue And White Illustrated	1%	*	1%
Philadelphia Inquirer	0%	0%	2%
Other	2%	1%	1%
None/nothing	1%	1%	2%
Don't know	*	*	*
Refused	*	1%	1%

Question 16

How, if at all, do the recent events involving Penn State affect your general feelings toward the University - would you say feel much more positively, somewhat more positively, somewhat more negatively, much more negatively or has it not changed your feelings toward the University?

TOTAL MORE POSITIVELY	May <u>2012</u> 9%	Dec <u>2012</u> 17%	<u>Dec</u> 2013 27%
TOTAL MORE NEGATIVELY	48%	38%	31%
Much more positively about the University	3%	7%	11%
Somewhat more positively about the University	6%	10%	17%
Somewhat more negatively about the University	36%	26%	23%
Much more negatively about the University	11%	12%	8%
It has not changed my feelings toward the University	41%	42%	38%
Don't know/not sure	3%	2%	3%



Question 17

How, if at all, have recent events impacted your likelihood: [Items tested in random order]

To donate to the University?

TOTAL MORE LIKELY TOTAL LESS LIKELY Much more likely Somewhat more likely Somewhat less likely Much less likely It has not affected my likelihood Don't know/not sure	May 2012 6% 29% 3% 3% 17% 13% 65% 0%	Dec 2012 10% 26% 3% 7% 12% 14% 64% 0%	Dec 2013 12% 23% 4% 8% 10% 14% 60% 5%
To promote the reputation of the University to a friend or family member?			
TOTAL MORE LIKELY TOTAL LESS LIKELY Much more likely Somewhat more likely Somewhat less likely Much less likely It has not affected my likelihood Don't know/not sure	May 2012 21% 23% 9% 12% 18% 5% 57% 0%	Dec 2012 25% 20% 13% 13% 15% 5% 54% 0%	Dec 2013 31% 15% 16% 15% 11% 4% 51% 3%
To recommend Penn State to a prospective undergraduate?			
TOTAL MORE LIKELY TOTAL LESS LIKELY Much more likely Somewhat more likely Somewhat less likely Much less likely It has not affected my likelihood Don't know/not sure	May 2012 12% 14% 6% 6% 11% 3% 74% 0%	Dec 2012 17% 14% 9% 8% 10% 4% 69% 0%	Dec 2013 22% 9% 11% 11% 7% 3% 67% 2%
To volunteer on behalf of the University?			
TOTAL MORE LIKELY TOTAL LESS LIKELY Much more likely Somewhat more likely Somewhat less likely Much less likely It has not affected my likelihood Don't know/not sure	May 2012 10% 16% 3% 7% 9% 7% 74% 0%	Dec 2012 14% 17% 5% 9% 8% 9% 69% 0%	Dec 2013 16% 12% 5% 11% 6% 6% 66%
Question 18 Thinking about how Penn State handled the events of the last year, would you say that			
TOTAL ALL/MOST RIGHT TOTAL ALL/MOST WRONG All of the actions Penn State took were the right thing to do Most of the actions Penn State were the right thing to do Most of the actions Penn State took were the wrong thing to do All of the actions Penn State took were the wrong thing to do	May 2012 11% 58% 4% 7% 30% 28%	Dec 2012 19% 26% 2% 16% 20%	Dec 2013 29% 20% 5% 25% 17% 3%



28%

31%

6%

56%

3%

51%

thing to do

All of the actions Penn State took were the wrong thing to do

Some of the actions Penn State took were the right thing to do, and some were the wrong

Question 19

What are examples of RIGHT actions Penn State took?

[Open-ended question asked of all right, most right, some right/some wrong, most wrong in Question 18, N=1,254; Results shown off total base]

	May	Dec	Dec
	<u>2012</u>	<u> 2012</u>	2013
DISMISSALS/NEW HIRES	30%	42%	31%
Firing others/dismissing Curly/Spanier/Athletic Director/President	16%	26%	10%
Hiring outside coach/non PSU coach/hiring Coach O'Brien	2%	10%	9%
Firing Joe Paterno/necessary action	11%	6%	3%
Bringing in new leadership/new President/new coach/new Athletic Director	3%	4%	8%
Cleaning house/fired people (general)	0%	0%	5%
Taking Sandusky's keys away/barring Sandusky from campus	1%	2%	1%
Hiring Rod Erickson as President	0%	2%	*
ABUSE SCANDAL/INVESTIGATION	15%	34%	41%
Accepting responsibility/sanctions	0%	12%	16%
Addressing the issue/not denying anything	6%	6%	6%
Private investigation/own investigation committee/hiring Louis Freeh to investigate	4%	9%	3%
Helping the victims and their families	3%	5%	5%
Acting quickly/swift response to charges	3%	4%	4%
Accepting the Freeh Report	0%	3%	7%
Transparency/being open and honest	0%	0%	6%
Cooperating with investigators/agencies	0%	2%	1%
OTHER MENTIONS	5%	26%	24%
Abuse awareness/fighting against child abuse	0%	9%	8%
Moving forward/trying to heal the University	0%	5%	11%
Constant communication/information from Alumni Office/being transparent	0%	9%	3%
Allowing athletes to complete their season/complete football season	1%	4%	2%
They took all the right actions (nonspecific)	4%	1%	1%
PATERNO MEMORIAL/FUNERAL	6%	4%	1%
Having Paterno's funeral on campus/acknowledged Paterno's contributions during funeral	3%	1%	*
Removing the statue/leaving the name on the library	0%	3%	*
Paying Paterno's family full pension/giving them the money they deserved	1%	*	*
Allowing student body to mourn/honor Coach Paterno	1%	*	0%
Other	1%	2%	1%
Nothing/none	11%	6%	7%
Don't know	5%	3%	5%
Refused	3%	3%	4%



Question 20

What are examples of WRONG actions Penn State took? [Open-ended question asked of most right, some right/some wrong, most wrong, all wrong in Question 18, N=1,238; Results shown off total base]

	May 2012	Dec 2012	<u>Dec</u> 2013
JOE PATERNO'S DISMISSAL	75%	36%	30%
Firing Joe Paterno/the way he was fired (nonspecific)	23%	25%	21%
No due process given to Paterno/action taken before hearing all the facts/jumped to	28%	6%	6%
conclusions/should have been given the opportunity to give his side of the story/moved to	2070	0 70	0 70
quickly			
Firing over the phone/should have done it face to face/given a slip of paper and told to call	26%	4%	2%
a number/poor means of communication with Paterno	2070	170	270
Paterno was going to retire anyway/should have waited for his retirement/should have let	10%	2%	*
him finish the season	.0,0	=70	
Firing only Joe Paterno/should have fired others	5%	1%	2%
Firing Joe Paterno late at night/announcement at night led to riots	4%	1%	*
ABUSE SCANDAL/BOARD OF TRUSTEES	25%	46%	32%
Cover up/covering up abuse/the University should have acted on the reporting when it	6%	20%	10%
happened/not handling the situation when it happened			, .
Allowing the media to dictate and influence actions that the University took/BoT responded	8%	6%	4%
to media pressure		-,-	
Board of Trustees communication/BoT's lack of communication with the public and/or	5%	6%	7%
students/lack of PR		-,-	
Using Paterno as a scapegoat for the abuse scandal	8%	3%	5%
Actions taken before having all the facts/knee jerk reaction/jumped to conclusions	0%	9%	7%
Spanier/firing Spanier/allowing Spanier to receive severance package	0%	6%	2%
University was unprepared/unprepared for the fallout/BoT was unprepared to handle a	2%	3%	1%
crisis/should have a crisis management team in place			
Lack of management/crisis management	0%	1%	1%
INVESTIGATION/SANCTIONS	0%	35%	32%
Accepting NCAA sanctions/should have fought the sanctions	0%	27%	20%
Freeh Report/blind acceptance of the Freeh Report	0%	15%	16%
Shouldn't have hired outside investigator/Louis Freeh	0%	3%	*
Didn't investigate first/didn't do a full investigation (general)	0%	0%	3%
Hiring Louis Freeh to investigate	0%	0%	2%
PATERNO'S LEGACY	19%	14%	13%
Paterno gave his life to Penn State/deserved better after 61 years of coaching/face of the	13%	3%	2%
University			
Taking down Paterno's statue	0%	10%	8%
Paterno reported what he knew/did what he was supposed to	8%	1%	1%
Not standing up for Paterno/not trying to clear Paterno's name	0%	0%	3%
Took Paterno's name off the big 10 trophy	*	*	*
OTHER CONCERNS	4%	6%	13%
Extremely poor treatment towards Joe Paterno and his family/treated his family bad/treated	3%	5%	4%
his wife bad			
All of it/everything (nonspecific)	*	1%	5%
Punishing the players/taking away winnings/less bowl games	0%	0%	3%
Other	3%	3%	2%
None/nothing	1%	3%	3%
Don't know	2%	2%	5%
Refused	3%	3%	4%



Question 21

Please indicate the extent to which you agree or disagree with the following statements - use a 0-10 scale where 0 means completely disagree and 10 means completely agree. [Statements randomized]

Penn State is committed to excellence in all its activities - academics, athletics, and research.

	May	Dec	<u>Dec</u>
	<u>2012</u>	2012	2013
8-10	75%	78%	78%
5-7	19%	15%	15%
0-4	4%	4%	4%
10 - COMPLETELY AGREE	42%	47%	47%
9	15%	16%	16%
8	18%	15%	15%
7	10%	8%	8%
6	4%	3%	2%
5	5%	4%	4%
4	1%	1%	2%
3	1%	1%	1%
2	1%	*	1%
1	*	0%	*
0 - COMPLETELY DISAGREE	1%	1%	1%
Don't know/not sure	2%	3%	3%
Mean	8.5	8.7	8.6

The public perception of athletic programs should not overshadow teaching, research and service found throughout the University.

8-10 5-7 0-4	May <u>2012</u> 81% 13% 3%	Dec <u>2012</u> 82% 12% 5%	<u>Dec</u> 2013 85% 11% 3%
10 - COMPLETELY AGREE	60%	66%	67%
9	9%	8%	9%
8	13%	8%	8%
7	5%	5%	4%
6	3%	2%	2%
5	5%	4%	4%
4	1%	1%	1%
3	1%	1%	1%
2	*	1%	*
1	*	*	*
0 - COMPLETELY DISAGREE	1%	2%	1%
Don't know/not sure	2%	2%	2%
Mean	8.8	8.9	9.0

Penn State is committed to doing the right thing for sexual abuse victims, their families, and the Penn State community. 2012: Penn State is committed to doing the right thing for victims, their families, and the Penn State community.

way	Dec	Dec
<u>2012</u>	<u> 2012</u>	<u>2013</u>
53%	61%	66%
27%	23%	18%
8%	6%	5%
26%	33%	39%
10%	13%	13%
17%	16%	13%
11%	10%	9%
6%	5%	4%
9%	7%	6%
2%	1%	1%
2%	2%	1%
2%	1%	1%
1%	*	1%
1%	1%	1%
12%	10%	11%
7.6	8.0	8.3
	2012 53% 27% 8% 26% 10% 11% 6% 9% 2% 2% 1% 1% 1%	2012 2012 53% 61% 27% 23% 8% 6% 26% 33% 10% 13% 17% 16% 11% 10% 6% 5% 9% 7% 2% 2% 2% 2% 2% 1% 1% 1% 12% 10%



Penn State is committed to the core values of honesty, integrity and community.

	iway	Dec	Dec
	<u>2012</u>	<u> 2012</u>	2013
8-10	57%	63%	62%
5-7	28%	24%	23%
0-4	10%	7%	9%
10 - COMPLETELY AGREE	26%	35%	33%
9	13%	12%	13%
8	18%	16%	16%
7	13%	11%	11%
6	7%	6%	5%
5	8%	6%	7%
4	4%	2%	2%
3	2%	3%	2%
2	2%	1%	2%
1	*	*	1%
0 - COMPLETELY DISAGREE	2%	1%	2%
Don't know/not sure	5%	5%	6%
Mean	7.6	8.0	7.8

Penn State will be able to rebuild the trust and confidence that people have had in the University.

	мау	Dec	Dec
	2012	<u>2012</u>	2013
8-10	63%	65%	66%
5-7	26%	23%	23%
0-4	5%	6%	6%
10 - COMPLETELY AGREE	33%	35%	35%
9	12%	13%	13%
8	18%	18%	17%
7	13%	9%	12%
6	6%	6%	6%
5	6%	8%	5%
4	1%	2%	2%
3	2%	2%	1%
2	1%	1%	2%
1	*	*	*
0 - COMPLETELY DISAGREE	*	1%	1%
Don't know/not sure	6%	6%	5%
Mean	8.1	8.0	8.1

Penn State should publicly recognize Joe Paterno for his service to Penn State. 2012: Penn State should publicly recognize Joe Paterno for his years of service to Penn State.

	iviay	Dec	Dec
	<u>2012</u>	<u> 2012</u>	<u>2013</u>
8-10	87%	75%	81%
5-7	7%	14%	9%
0-4	3%	7%	6%
10 - COMPLETELY AGREE	76%	61%	70%
9	6%	6%	5%
8	5%	8%	6%
7	3%	6%	4%
6	1%	3%	1%
5	3%	6%	4%
4	*	1%	1%
3	1%	2%	1%
2	*	1%	1%
1	*	1%	1%
0 - COMPLETELY DISAGREE	1%	3%	2%
Don't know/not sure	3%	4%	3%
Mean	9.3	8.6	8.9

May

Dec

Dec



Penn State has made progress in implementing nearly all the recommendations in the Freeh Report. 2012: Penn State has made progress in implementing the recommendations outlined in the Freeh Report.

8-10	Dec <u>2012</u> 34%	<u>Dec</u> 2013 48%
5-7	26%	15%
0-4	5%	4%
10 - COMPLETELY AGREE	13%	22%
9	8%	11%
8	13%	14%
7	12%	9%
6	5%	3%
5	9%	4%
4	2%	1%
3	1%	1%
2	1%	*
1	1%	*
0 - COMPLETELY DISAGREE	1%	1%
Don't know/not sure	35%	33%
Mean	7.4	8.1

Penn State is committed to openness and transparency.

	Dec
8-10	<u>2013</u> 40%
5-7	29%
0-4	21%
10 - COMPLETELY AGREE	15%
9	10%
8	14%
7	11%
6	8%
5	10%
4	4%
3	6%
2	3%
1	1%
0 - COMPLETELY DISAGREE	7%
Don't know/not sure	10%
Mean	6.4

Question 22

Please indicate the extent to which you TRUST the following groups to provide you with information about Penn State - use a 0-10 scale where 0 means you do not trust them at all and 10 means you completely trust them.

[Groups tested in random order]

May

Dec

The Penn State Board of Trustees

way	Dec	Dec
<u>2012</u>	<u>2012</u>	<u>2013</u>
13%	16%	16%
33%	34%	37%
49%	44%	39%
3%	3%	3%
2%	3%	3%
8%	9%	10%
10%	10%	12%
8%	9%	10%
14%	15%	14%
7%	8%	5%
9%	9%	7%
7%	6%	6%
6%	4%	5%
20%	18%	15%
6%	6%	9%
4.0	4.3	4.5
	2012 13% 33% 49% 3% 2% 8% 10% 8% 14% 7% 9% 7% 6% 20% 6%	2012 2012 13% 16% 33% 34% 49% 44% 3% 3% 2% 3% 8% 9% 10% 10% 8% 9% 14% 15% 7% 8% 9% 9% 7% 6% 6% 4% 20% 18% 6% 6%



May

Dec

Dec

The Penn State Alumni Association

8-10 5-7 0-4 10 - TRUST COMPLETELY 9 8 7 6 5 4 3 2 1 0 - DO NOT TRUST AT ALL Don't know/not sure Mean	2012 57% 31% 7% 18% 16% 23% 16% 7% 9% 2% 2% 1% *	2012 60% 27% 7% 25% 13% 62% 13% 6% 8% 2% 1% 1% 1% 2% 5% 7.7	2013 66% 24% 5% 24% 19% 23% 12% 4% 8% 22% 11% * 15% 58.0
The Penn State University Administration			
8-10 5-7 0-4 10 - TRUST COMPLETELY 9 8 7 6 5 4 3 2 1 0 - DO NOT TRUST AT ALL Don't know/not sure Mean	May 2012 23% 44% 27% 5% 4% 14% 16% 12% 17% 6% 6% 6% 6% 6% 5.5	Dec 2012 26% 41% 27% 6% 5% 15% 10% 16% 6% 4% 22% 9% 5.5	Dec 2013 28% 40% 25% 5% 7% 16% 14% 11% 44% 5% 6% 4% 3% 7% 8% 5.7
Current Penn State students			
8-10 5-7 0-4 10 - TRUST COMPLETELY 9 8 7 6 5 4 3 2 1 0 - DO NOT TRUST AT ALL Don't know/not sure Mean	May 2012 56% 32% 5% 22% 12% 16% 6% 10% 1% 1% 1% 7% 7.7	Dec 2012 66% 24% 3% 31% 15% 20% 10% 5% 8% 1% 1% 1% 7% 8.1	Dec 2013 67% 22% 29% 19% 19% 11% 4% 7% 1% 1% * * * * * * * * * * * * * * * *



Penn State faculty and staff

8-10 5-7 0-4 10 - TRUST COMPLETELY 9 8 7 6 5 4 3 2 1 0 - DO NOT TRUST AT ALL Don't know/not sure Mean [Note: Demographic data appended from the sample records provided by the Penn State Alumnia.	i Associatio	n]	Dec 2013 64% 26% 3% 22% 20% 22% 15% 6% 1% 1% * *
	ASSOCIALIO	rij	
MALE FEMALE	May 2012 58% 42%	Dec 2012 57% 43%	<u>Dec</u> 2013 60% 40%
Age			
30 or under 31-40 41-50 51-60 61 and above	May 2012 19% 18% 17% 21% 26%	Dec 2012 19% 15% 17% 22% 27%	<u>Dec</u> 2013 15% 15% 18% 23% 29%
Class Year			
2010s 2000s 1990s 1980s 1970s Before 1970s	May 2012 8% 25% 16% 17% 19%	Dec 2012 10% 22% 14% 19% 19%	Dec 2013 9% 19% 16% 20% 21%
PSAA Membership			
Active member TOTAL NON-MEMBER Inactive None	May 2012 48% 52% 44% 7%	Dec 2012 45% 55% 46% 9%	Dec 2013 56% 44% 37% 7%
Campus			
University Park Other campus	May 2012 59% 41%	Dec 2012 55% 45%	<u>Dec</u> 2013 57% 43%



U.S. Census Region

	May	Dec	Dec
	<u>2012</u>	<u> 2012</u>	<u>2013</u>
Northeast	72%	72%	69%
Midwest	6%	7%	7%
South	15%	14%	16%
West	8%	7%	8%

