

SUMMARY MEMBERSHIP ANALYSIS FOR THE

# Mid-Am Hockey Assoc.

IN, KY, OH, PA, WV

*Trends of first-time 4 to 8 year-old male ice hockey players – 1997-98 to 2007-08*

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## USA HOCKEY MEMBERSHIP DEVELOPMENT



## Background

USA Hockey's Membership Development Department has been conducting comprehensive research to gain a deeper understanding as to why certain segments of USA Hockey membership – most notably the core male ice hockey segment – have been shrinking in recent years.

This study isolated the behavior of first-time 4 to 8 year olds in determining the likelihood of returning for a second season. The data stretches back a full 10 years beginning in the 1997-98 season and runs through the most recent season 2007-08. The data is further segmented by state enabling us to analyze trends based on geography and in light of historical strengths and weaknesses. For example, the state of Massachusetts has been a consistent leader in attracting new hockey players especially in this age group. Yet like most states, acquisition numbers have been sliding for at least a decade accompanied by a parallel drop in retention numbers.

It is important to note however, that one of the key metrics of this study focuses on the *rate of retention* – that is the *percentage* of retained members from the universe of acquired members from the prior year. For example, if a state signs up 1,000 first-time players this season and 700 players return the next season, then the retention rate for that state is 70 percent. If in three years the same state signs up only 800 first-time players and 560 players return the next season, then the retention rate would also be 70 percent.

In many cases within the USA Hockey family, retention rates have been remarkably consistent in recent years averaging close to 70 percent across the country. It has been a drop in the acquisition of new first-timers that has been the primary cause of membership slippage in recent years. Such conditions require USA Hockey's Membership Development Department to travel concurrent paths in mounting future growth initiatives:

- A comprehensive *retention strategy* to insure that we keep as many members as possible from one season to the next; and
- A comprehensive *acquisition strategy* to insure that we attract as many prospective new members every season

Clearly, this two-pronged approach requires a coordinated effort with USA Hockey's Membership Development Department and youth hockey volunteers at the grass roots level across the country.

The following analysis based on secondary data provided by Assistant Executive Director of Member Services Rae Briggie and her staff in the national office of USA Hockey. We anticipate that additional research including additional quantitative as well as qualitative studies all the way down to the local program level will be conducted over the coming months in order to determine the best course of action in order to insure the future health of the game of hockey.

## Methodology

**This study focused on the very youngest age groups – boys ages 4 through 8 – and further isolated those members that signed up to play ice hockey for the very first time.** The sample, then, is made up of first-time 4, 5, 6, 7, and 8 year olds in each of the last 10 seasons beginning with the 1998-99 season through the 2007-08 season. This methodology allows us to measure the (a) number of NEWLY ACQUIRED players (the ONES); (b) number of RETAINED players (the TWOS); (c) the number of LOST players; as well as (d) the RETENTION RATE of players by age segment in each of the last 10 seasons.

The study further allows us to isolate these results on a state-by-state basis to determine behavioral trends based on geography and in light of historical results based on decades of registration figures.

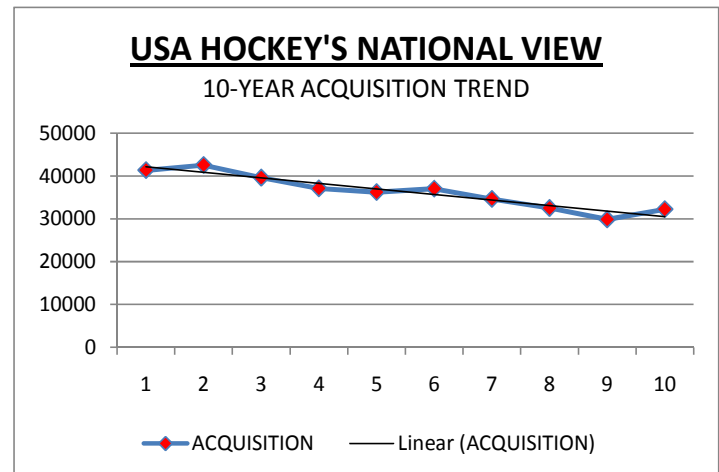
***Note: For the purpose of this study, Pennsylvania includes statistics for the entire state, even though Eastern PA and Western PA are in two different districts.***

## National View

### ACQUISITION

- Acquisition of first-time players is down **22.1%** over the last 10 years
  - Acquired 32,270 first-time players in 2006-07 – down from 41,380 in 1997-98
- Acquisition has steadily declined over the last 10 years but was up **7.9%** in 2006-07

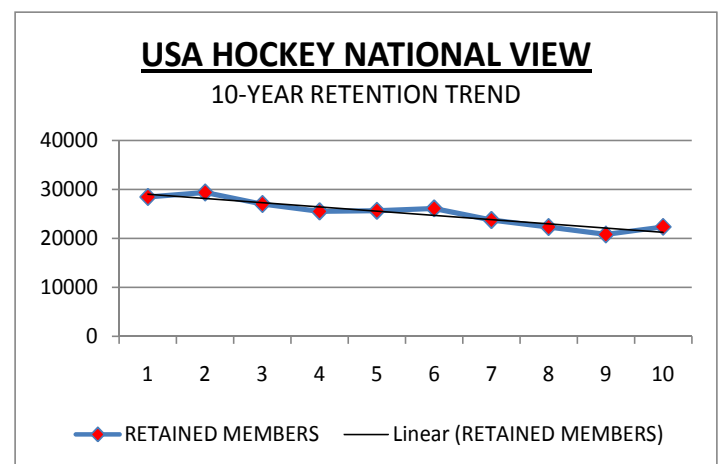
USA HOCKEY ACQUISITION OF NEW PLAYERS				
Season	NEW	vs PY#	*+/-	vs PY%
1997-98	41380	N/A	N/A	N/A
1998-99	42587	41380	1207	2.9%
1999-00	39629	42587	(2958)	-6.9%
2000-01	37124	39629	(2505)	-6.3%
2001-02	36260	37124	(864)	-2.3%
2002-03	37050	36260	790	2.2%
2003-04	34668	37050	(2382)	-6.4%
2004-05	32536	34668	(2132)	-6.1%
2005-06	29901	32536	(2635)	-8.1%
2006-07	32270	29901	2369	7.9%



### RETENTION

- Retention of first-time players was down **21.6%** over the last 10 years
  - Retained 22,373 first-time players in 2007-08 – down from 28,470 in 1998-99
  - Retention has mostly declined over the last 10 years but was up **7.5%** in 2007-08.

USA HOCKEY RETENTION OF NEW PLAYERS				
Season	RET	vs PY#	*+/-	vsPY%
1998-99	28470	N/A	N/A	N/A
1999-00	29390	28470	920	3.2%
2000-01	27038	29390	(2352)	-8.0%
2001-02	25547	27038	(1491)	-5.5%
2002-03	25653	25547	106	0.4%
2003-04	26151	25653	498	1.9%
2004-05	23767	26151	(2384)	-9.1%
2005-06	22342	23767	(1425)	-6.0%
2006-07	20811	22342	(1531)	-6.9%
2007-08	22373	20811	1562	7.5%



### RETENTION RATE

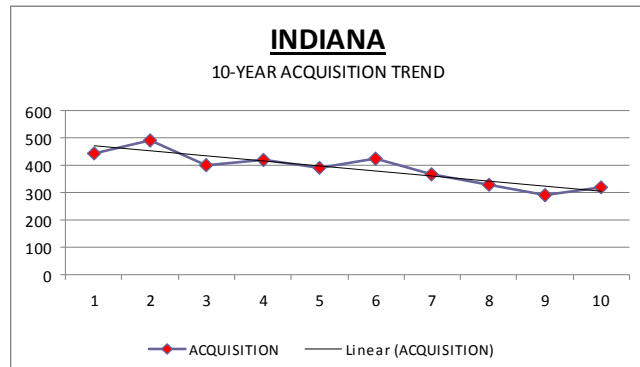
- Retention rate has averaged **69.0%** over the last 10 years – up slightly in 2007-08 to **69.1%**
- On average, USA Hockey retains **7 of every 10 players** it acquires.

## Indiana

### ACQUISITION

- Down **28.5%** over the past 10 years, compared to a national average of down **22.1%**
- Acquired **317** first-time players in 2006-07, down from **443** in 1997-98
- Acquisition rank: **25<sup>th</sup>** in the country in 2006-07

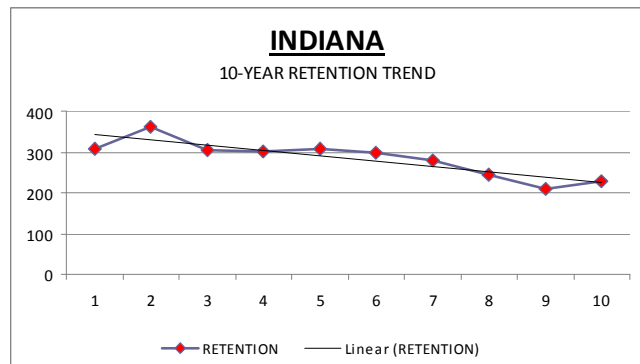
Indiana Acquisition of New Players				
Season	New	vs PY#	*+/-	vs PY%
1997-98	443	N/A	N/A	N/A
1998-99	492	443	49	11.1%
1999-00	401	492	(91)	-18.5%
2000-01	419	401	18	4.5%
2001-02	392	419	(27)	-6.4%
2002-03	422	392	30	7.7%
2003-04	369	422	(53)	-12.6%
2004-05	327	369	(42)	-11.4%
2005-06	290	327	(37)	-11.3%
2006-07	317	290	27	9.3%



### RETENTION

- Down **26.1%** over the last 10 years, compared to a national average of down **21.6%**
- Retained **227** first-time players in 2007-08, down from **307** in 1998-99
- Retention rank: **25<sup>th</sup>** in the country in 2007-08

Indiana Retention of New Players				
Season	Ret	vs PY#	*+/-	vsPY%
1998-99	307	N/A	N/A	N/A
1999-00	363	307	56	18.2%
2000-01	305	363	(58)	-16.0%
2001-02	301	305	(4)	-1.3%
2002-03	308	301	7	2.3%
2003-04	299	308	(9)	-2.9%
2004-05	279	299	(20)	-6.7%
2005-06	243	279	(36)	-12.9%
2006-07	208	243	(35)	-14.4%
2007-08	227	208	19	9.1%



## Indiana

### RETENTION RATE

- Retention rate of **71.6%** in 2007-08, compared to a national average of **69.1%**
- Retention rate rank: **20<sup>th</sup>** in the country in 2007-08

Indiana Rate of Retaining New Players		
Season	Rate	Rank
1998-99	69.3%	N/A
1999-00	73.8%	N/A
2000-01	76.1%	N/A
2001-02	71.8%	N/A
2002-03	78.6%	N/A
2003-04	70.9%	N/A
2004-05	75.6%	N/A
2005-06	74.3%	N/A
2006-07	71.7%	N/A
2007-08	71.6%	20
10-year average	73.4%	10

### KEY TAKEAWAY POINTS

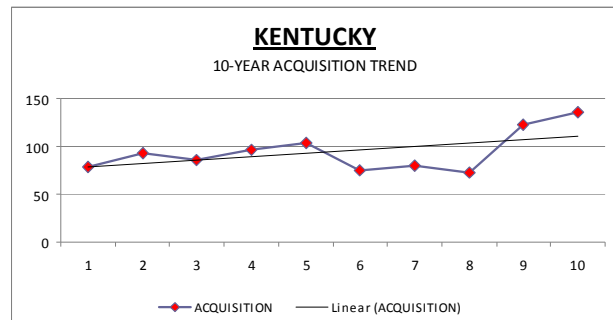
- Acquisition has dropped in three of the past four years and is performing slightly below the national average
- Retention has followed a similar path to acquisition, and is down in four of the past five years
- Retention rate has been strong, performing above the national average over the past 10 years and has been above 70% in each of the past nine seasons

## Kentucky

### ACQUISITION

- Up **74.4%** over the past 10 years, compared to a national average of down **22.1%**
- Acquired **136** first-time players in 2006-07, up from **78** in 1997-98
- Acquisition rank: **35<sup>th</sup>** in the country in 2006-07

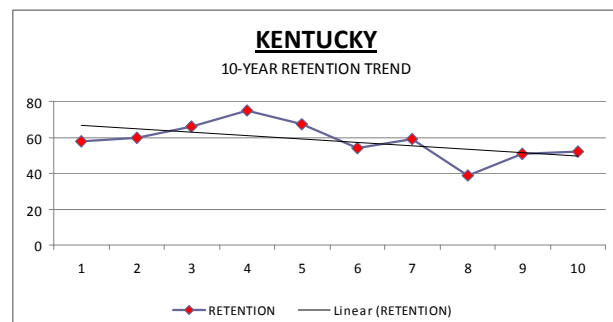
Kentucky Acquisition of New Players				
Season	New	vs PY#	*+/-	vs PY%
1997-98	78	N/A	N/A	N/A
1998-99	93	78	15	19.2%
1999-00	86	93	(7)	-7.5%
2000-01	96	86	10	11.6%
2001-02	104	96	8	8.3%
2002-03	75	104	(29)	-27.9%
2003-04	80	75	5	6.7%
2004-05	73	80	(7)	-8.8%
2005-06	123	73	50	68.5%
2006-07	136	123	13	10.6%



### RETENTION

- Down **10.4%** over the last 10 years, compared to a national average of down **21.6%**
- Retained **52** first-time players in 2007-08, down from **58** in 1998-99
- Retention rank: **40<sup>th</sup>** in the country in 2007-08

Kentucky Retention of New Players				
Season	Ret	vs PY#	*+/-	vsPY%
1998-99	58	N/A	N/A	N/A
1999-00	60	58	2	3.4%
2000-01	66	60	6	10.0%
2001-02	75	66	9	13.6%
2002-03	67	75	(8)	-10.7%
2003-04	54	67	(13)	-19.4%
2004-05	59	54	5	9.3%
2005-06	39	59	(20)	-33.9%
2006-07	51	39	12	30.8%
2007-08	52	51	1	2.0%



## Kentucky

### RETENTION RATE

- Retention rate of **38.2%** in 2007-08, compared to a national average of **69.1%**
- Retention rate rank: **49<sup>th</sup>** in the country in 2007-08

Kentucky Rate of Retaining New Players		
Season	Rate	Rank
1998-99	74.4%	N/A
1999-00	64.5%	N/A
2000-01	76.7%	N/A
2001-02	78.1%	N/A
2002-03	64.4%	N/A
2003-04	72.0%	N/A
2004-05	73.8%	N/A
2005-06	53.4%	N/A
2006-07	41.5%	N/A
2007-08	38.2%	49
10-year average	63.7%	39

### KEY TAKEAWAY POINTS

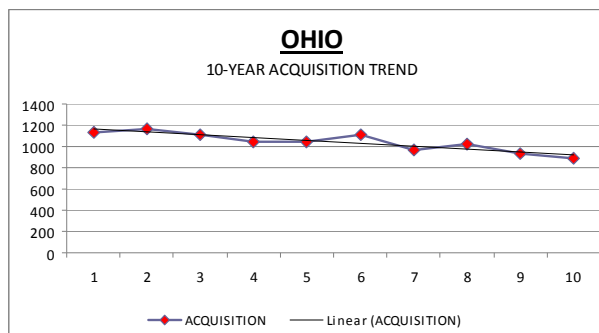
- Acquisition has increased significantly over the past 10 years, highlighted by an increase of 50 participants in 2005-06
- Retention has not followed the acquisition growth contrary to the national averages
- Retention rate has dropped tremendously over the past three years

## Ohio

### ACQUISITION

- Down **21.6%** over the past 10 years, compared to a national average of down **22.1%**
- Acquired **892** first-time players in 2006-07, down from **1137** in 1997-98
- Acquisition rank: **11<sup>th</sup>** in the country in 2006-07

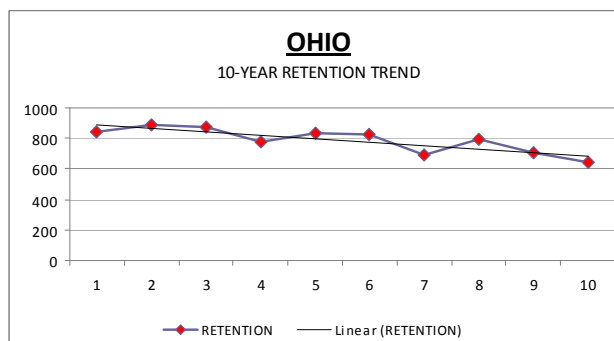
Ohio Acquisition of New Players				
Season	New	vs PY#	*+/-	vs PY%
1997-98	1137	N/A	N/A	N/A
1998-99	1170	1137	33	2.9%
1999-00	1107	1170	(63)	-5.4%
2000-01	1049	1107	(58)	-5.2%
2001-02	1046	1049	(3)	-0.3%
2002-03	1109	1046	63	6.0%
2003-04	965	1109	(144)	-13.0%
2004-05	1022	965	57	5.9%
2005-06	930	1022	(92)	-9.0%
2006-07	892	930	(38)	-4.1%



### RETENTION

- Down **24.0%** over the last 10 years, compared to a national average of down **21.6%**
- Retained **641** first-time players in 2007-08, down from **843** in 1998-99
- Retention rank: **11<sup>th</sup>** in the country in 2007-08

Ohio Retention of New Players				
Season	Ret	vs PY#	*+/-	vsPY%
1998-99	843	N/A	N/A	N/A
1999-00	889	843	46	5.5%
2000-01	874	889	(15)	-1.7%
2001-02	781	874	(93)	-10.6%
2002-03	834	781	53	6.8%
2003-04	824	834	(10)	-1.2%
2004-05	687	824	(137)	-16.6%
2005-06	796	687	109	15.9%
2006-07	709	796	(87)	-10.9%
2007-08	641	709	(68)	-9.6%





## Ohio

### RETENTION RATE

- Retention rate of **71.9%** in 2007-08, compared to a national average of **69.1%**
- Retention rate rank: **19<sup>th</sup>** in the country in 2007-08

Ohio Rate of Retaining New Players		
Season	Rate	Rank
1998-99	74.1%	N/A
1999-00	76.0%	N/A
2000-01	79.0%	N/A
2001-02	74.5%	N/A
2002-03	79.7%	N/A
2003-04	74.3%	N/A
2004-05	71.2%	N/A
2005-06	77.9%	N/A
2006-07	76.2%	N/A
2007-08	71.9%	19
10-year average	75.5%	6

### KEY TAKEAWAY POINTS

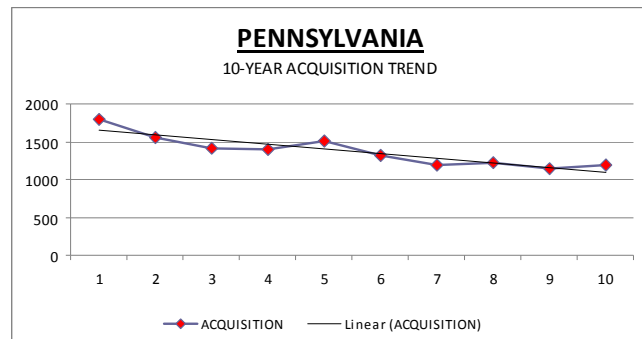
- Acquisition has steadily declined over the past 10 years, consistent with the national average
- Retention has followed a similar path to acquisition, and is down four of the past five years
- Retention rate is performing above the national average and is consistently over 70%

## Pennsylvania

### ACQUISITION

- Down **34.2%** over the past 10 years, compared to a national average of down **22.1%**
- Acquired **1183** first-time players in 2006-07, down from **1797** in 1997-98
- Acquisition rank: **7<sup>th</sup>** in the country in 2006-07

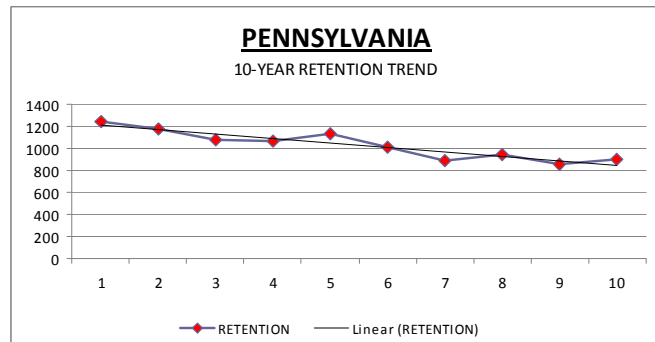
Pennsylvania Acquisition of New Players				
Season	New	vs PY#	*+/-	vs PY%
1997-98	1797	N/A	N/A	N/A
1998-99	1551	1797	(246)	-13.7%
1999-00	1418	1551	(133)	-8.6%
2000-01	1395	1418	(23)	-1.6%
2001-02	1501	1395	106	7.6%
2002-03	1315	1501	(186)	-12.4%
2003-04	1196	1315	(119)	-9.0%
2004-05	1218	1196	22	1.8%
2005-06	1141	1218	(77)	-6.3%
2006-07	1183	1141	42	3.7%



### RETENTION

- Down **27.9%** over the last 10 years, compared to a national average of down **21.6%**
- Retained **900** first-time players in 2007-08, down from **1248** in 1998-99
- Retention rank: **7<sup>th</sup>** in the country in 2007-08

Pennsylvania Retention of New Players				
Season	Ret	vs PY#	*+/-	vsPY%
1998-99	1248	N/A	N/A	N/A
1999-00	1173	1248	(75)	-6.0%
2000-01	1083	1173	(90)	-7.7%
2001-02	1065	1083	(18)	-1.7%
2002-03	1128	1065	63	5.9%
2003-04	1009	1128	(119)	-10.5%
2004-05	893	1009	(116)	-11.5%
2005-06	945	893	52	5.8%
2006-07	854	945	(91)	-9.6%
2007-08	900	854	46	5.4%



## Pennsylvania

### RETENTION RATE

- Retention rate of **76.1%** in 2007-08, compared to a national average of **69.1%**
- Retention rate rank: **5<sup>th</sup>** in the country in 2007-08

Pennsylvania Rate of Retaining New Players		
Season	Rate	Rank
1998-99	69.4%	N/A
1999-00	75.6%	N/A
2000-01	76.4%	N/A
2001-02	76.3%	N/A
2002-03	75.1%	N/A
2003-04	76.7%	N/A
2004-05	74.7%	N/A
2005-06	77.6%	N/A
2006-07	74.8%	N/A
2007-08	76.1%	5
<b>10-year average</b>	<b>75.3%</b>	<b>8</b>

### KEY TAKEAWAY POINTS

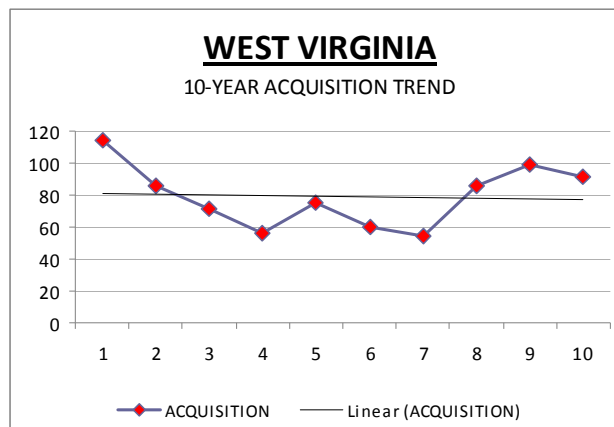
- Acquisition has seen a steady decline over the past 10 years, but has been up two of the past three seasons
- Retention has followed an almost identical path as acquisition
- Pennsylvania's retention rate is consistently among the best in the country

## West Virginia

### ACQUISITION

- Down **20.2%** over the past 10 years, compared to a national average of down **22.1%**
- Acquired **91** first-time players in 2006-07, down from **114** in 1997-98
- Acquisition rank: **39<sup>th</sup>** in the country in 2006-07

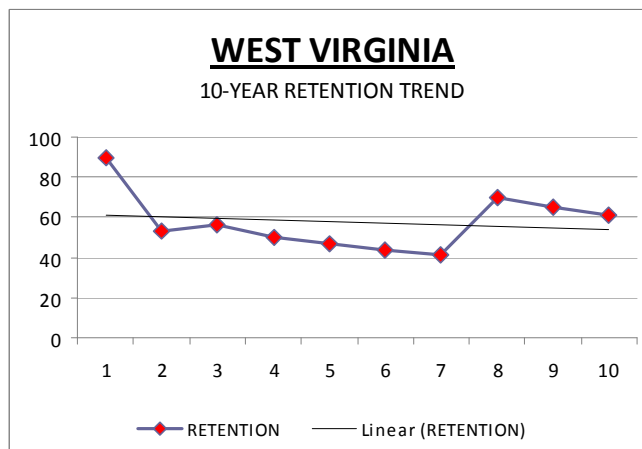
West Virginia Acquisition of New Players				
Season	New	vs PY#	*+/-	vs PY%
1997-98	114	N/A	N/A	N/A
1998-99	86	114	(28)	-24.6%
1999-00	71	86	(15)	-17.4%
2000-01	56	71	(15)	-21.1%
2001-02	75	56	19	33.9%
2002-03	60	75	(15)	-20.0%
2003-04	54	60	(6)	-10.0%
2004-05	86	54	32	59.3%
2005-06	99	86	13	15.1%
2006-07	91	99	(8)	-8.1%



### RETENTION

- Down **32.3%** over the last 10 years, compared to a national average of down **21.6%**
- Retained **61** first-time players in 2007-08, down from **90** in 1998-99
- Retention rank: **38<sup>th</sup>** in the country in 2007-08

West Virginia Retention of New Players				
Season	Ret	vs PY#	*+/-	vs PY%
1998-99	90	N/A	N/A	N/A
1999-00	53	90	(37)	-41.1%
2000-01	56	53	3	5.7%
2001-02	50	56	(6)	-10.7%
2002-03	47	50	(3)	-6.0%
2003-04	44	47	(3)	-6.4%
2004-05	41	44	(3)	-6.8%
2005-06	70	41	29	70.7%
2006-07	65	70	(5)	-7.1%
2007-08	61	65	(4)	-6.2%



## West Virginia

### RETENTION RATE

- Retention rate of **67.0%** in 2007-08, compared to a national average of **69.1%**
- Retention rate rank: **31<sup>st</sup>** in the country in 2007-08

West Virginia Rate of Retaining New Players		
Season	Rate	Rank
1998-99	78.9%	N/A
1999-00	61.6%	N/A
2000-01	78.9%	N/A
2001-02	89.3%	N/A
2002-03	62.7%	N/A
2003-04	73.3%	N/A
2004-05	75.9%	N/A
2005-06	81.4%	N/A
2006-07	65.7%	N/A
2007-08	67.0%	31
<b>10-year average</b>	<b>73.5%</b>	<b>9</b>

### KEY TAKEAWAY POINTS

- Acquisition is down consistent with the national average but was actually up in two of the past three seasons
- Retention was strong (29 more than prior year) in 2005-06 but has steadily declined otherwise
- Retention rate has fluctuated but the 10-year average is strong. The past two years have seen a slip in retention rate

## State By State Rankings

The following is a summary of each state's ranking in acquisition, retention and retention rate for the 2006-07 and 2007-08 seasons, as well as a 10-year cumulative retention rate ranking. For the purpose of this graph, a player who was counted as an "acquisition" in 2006-07 would be "retained" for the 2007-08 season. This is the most up-to-date information available, as the retention figures from 2008-09 are still being compiled.

For example: In 2006-07, Alaska was 17<sup>th</sup> of 50 states in acquisition. The following season, they were 18<sup>th</sup> of 50 states in retention and 40<sup>th</sup> of 50 states in retention rate. Over the past 10 years, Alaska has retained 66.1% of first-year participants, which is 30<sup>th</sup> of 50 states.

STATE	2006-07 and 2007-08			10-year Average	
	2006-07	2007-08		1997-98--2007-08	
	ACQ	RET.	RET.RATE	RETENTION	
	RANK	RANK	RANK	RATE	RANK
AK	17	18	40	66.1%	30
AL	40	39	9	72.0%	16
AR	47	46	4	63.4%	41
AZ	30	30	41	62.2%	43
CA	10	10	16	63.9%	38
CO	12	11	3	77.5%	2
CT	8	8	37	65.1%	37
DE	45	44	1	75.8%	4
FL	18	19	39	65.3%	34
GA	33	33	24	72.2%	15
HI	50	50	50	49.6%	50
IA	28	28	30	66.8%	28
ID	34	34	7	71.1%	18
IL	6	6	12	70.0%	19
IN	25	25	20	73.4%	10
KS	42	42	2	77.6%	1
KY	35	40	49	63.7%	39
LA	49	49	47	55.2%	49
MA	2	2	43	61.2%	45
MD	23	23	8	73.3%	11
ME	13	15	27	68.3%	23
MI	4	4	10	75.6%	5
MN	1	1	6	75.3%	7
MO	22	22	22	72.4%	14
MS	48	48	25	56.5%	48
MT	32	32	34	65.3%	35
NC	26	26	32	72.8%	13
ND	21	17	13	72.9%	12
NE	38	36	28	75.8%	3
NH	15	14	15	68.1%	24
NJ	9	9	36	68.7%	22
NM	41	41	18	69.8%	20
NV	46	47	44	57.2%	47
NY	3	3	23	67.9%	25
OH	11	11	19	75.5%	6
OK	44	45	46	66.0%	32
OR	43	43	26	65.3%	36
PA	7	7	5	75.3%	8
RI	16	16	29	60.7%	46
SC	37	37	45	66.1%	31
SD	29	27	14	69.6%	21
TN	27	29	48	67.8%	26
TX	14	13	17	62.7%	42
UT	31	31	11	61.7%	44
VA	24	24	21	71.5%	17
VT	19	20	38	66.6%	29
WA	20	21	35	63.6%	40
WI	5	5	33	67.2%	27
WV	39	38	31	73.5%	9
WY	36	35	42	65.9%	33

# 10-year Average Retention Rates

