SUMMARY MEMBERSHIP ANALYSIS FOR THE

Southern Amateur Hockey Association

AL, AR, GA, LA, MS, TN

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 Briggle 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.

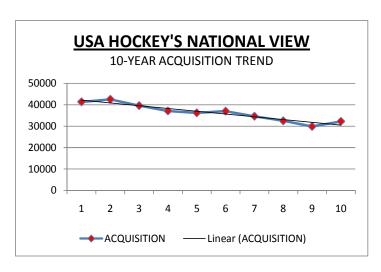
The study further allows us to isolate these results on a state-by-state basis to determine behavioral trends based on geography and in light of historical results based on decades of registration figures.

National View

ACQUISITION

- Acquisition of first-time players is down 22.1% over the last 10 years
 - o 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

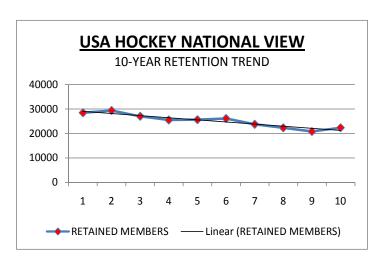
USA HOCKEY ACQUISITION OF NEW PLAYERS					
Season	NEW	vs PY#	*+/-	vs PY%	
1997-98	41380	N/A	N/A	N/A	
1998-99	42587	41380	1207	2.9%	
1999-00	39629	42587	(2958)	-6.9%	
2000-01	37124	39629	(2505)	-6.3%	
2001-02	36260	37124	(864)	-2.3%	
2002-03	37050	36260	790	2.2%	
2003-04	34668	37050	(2382)	-6.4%	
2004-05	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
 - o Retained 22,373 first-time players in 2007-08 down from 28,470 in 1998-99
 - o 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

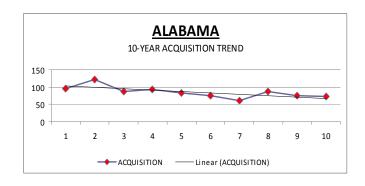
- Retention rate has averaged 69.0% over the last 10 years up slightly in 2007-08 to 69.1%
- On average, USA Hockey retains 7 of every 10 players it acquires.

Alabama

ACQUISITION

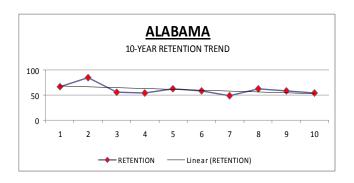
- Down 24.3% over the past 10 years, compared to a national average of down 22.1%
- Acquired **72** first-time players in 2006-07, down from **95** in 1997-98
- Acquisition rank: 40th in the country in 2006-07

Alabama Acquisition of New Players				
Season	New	vs PY#	*+/-	vs PY%
1997-98	95	N/A	N/A	N/A
1998-99	122	95	27	28.4%
1999-00	88	122	(34)	-27.9%
2000-01	93	88	5	5.7%
2001-02	84	93	(9)	-9.7%
2002-03	75	84	(9)	-10.7%
2003-04	60	75	(15)	-20.0%
2004-05	87	60	27	45.0%
2005-06	76	87	(11)	-12.6%
2006-07	72	76	(4)	-5.3%



- Down 19.5% over the last 10 years, compared to a national average of down 21.6%
- Retained **54** first-time players in 2007-08, down from **67** in 1998-99
- Retention rank: **39**th in the country in 2007-08

Alabama Retention of New Players				
Season	Ret	vs PY#	*+/-	vsPY%
1998-99	67	N/A	N/A	N/A
1999-00	85	67	18	26.9%
2000-01	56	85	(29)	-34.1%
2001-02	54	56	(2)	-3.6%
2002-03	62	54	8	14.8%
2003-04	59	62	(3)	-4.8%
2004-05	49	59	(10)	-16.9%
2005-06	62	49	13	26.5%
2006-07	59	62	(3)	-4.8%
2007-08	54	59	(5)	-8.5%



Alabama

RETENTION RATE

- Retention rate of 75.0% in 2007-08, compared to a national average of 69.1%
- Retention rate rank: 9th in the country in 2007-08

Alabama Rate of Retaining New Players					
Season	Rate	Rank			
1998-99	70.5%	N/A			
1999-00	69.7%	N/A			
2000-01	63.6%	N/A			
2001-02	58.1%	N/A			
2002-03	73.8%	N/A			
2003-04	78.7%	N/A			
2004-05	81.7%	N/A			
2005-06	71.3%	N/A			
2006-07	77.6%	N/A			
2007-08	75.0%	9			
10-year average	72.0%	16			

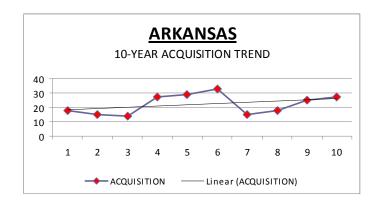
- Acquisition is down in five of the past six seasons and consistent with the national average.
- Retention has followed a similar path, performing slightly better than the national average.
- Retention rate has been strong, with at least 71% of first-year players returning in each of the past six seasons.

Arkansas

ACQUISITION

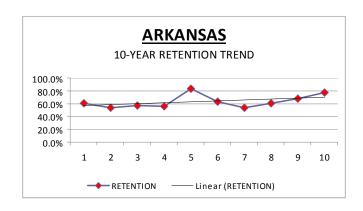
- Up 50.0% over the past 10 years, compared to a national average of down 22.1%
- Acquired 27 first-time players in 2006-07, up from 18 in 1997-98
- Acquisition rank: 47th in the country in 2006-07

Arkansas Acquisition of New Players				
Season	New	vs PY#	*+/-	vs PY%
1997-98	18	N/A	N/A	N/A
1998-99	15	18	(3)	-16.7%
1999-00	14	15	(1)	-6.7%
2000-01	27	14	13	92.9%
2001-02	29	27	2	7.4%
2002-03	33	29	4	13.8%
2003-04	15	33	(18)	-54.5%
2004-05	18	15	3	20.0%
2005-06	25	18	7	38.9%
2006-07	27	25	2	8.0%



- Up 90.9% over the last 10 years, compared to a national average of down 21.6%
- Retained 21 first-time players in 2007-08, up from 11 in 1998-99
- Retention rank: 46th in the country in 2007-08

Arkansas Retention of New Players				
Season	Ret	vs PY#	*+/-	vsPY%
1998-99	11	N/A	N/A	N/A
1999-00	8	11	(3)	-27.3%
2000-01	8	8	0	0.0%
2001-02	15	8	7	87.5%
2002-03	24	15	9	60.0%
2003-04	21	24	(3)	-12.5%
2004-05	8	21	(13)	-61.9%
2005-06	11	8	3	37.5%
2006-07	17	11	6	54.5%
2007-08	21	17	4	23.5%



Arkansas

RETENTION RATE

- Retention rate of 77.8% in 2007-08, compared to a national average of 69.1%
- Retention rate rank: 4th in the country in 2007-08

Arkansas	Arkansas Rate of Retaining New Players					
Season	Rate	Rank				
1998-99	61.1%	N/A				
1999-00	53.3%	N/A				
2000-01	57.1%	N/A				
2001-02	55.6%	N/A				
2002-03	82.8%	N/A				
2003-04	63.6%	N/A				
2004-05	53.3%	N/A				
2005-06	61.1%	N/A				
2006-07	68.0%	N/A				
2007-08	77.8%	4				
10-year average	63.4%	41				

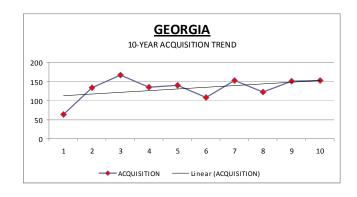
- Acquisition has been strong over the past 10 years, with only one major decline (2003-04 season).
- Retention is also performing well above the national average.
- Retention rate was strong last season (2007-08) but overall has been well below the national average.

Georgia

ACQUISITION

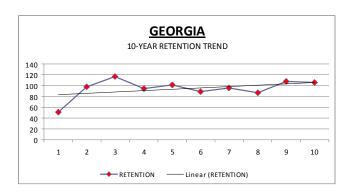
- Up 139% over the past 10 years, compared to a national average of down 22.1%
- Acquired 153 first-time players in 2006-07, up from 64 in 1997-98
- Acquisition rank: 33rd in the country in 2006-07

Georgia Acquisition of New Players				
Season	New	vs PY#	*+/-	vs PY%
1997-98	64	N/A	N/A	N/A
1998-99	134	64	70	109.4%
1999-00	166	134	32	23.9%
2000-01	135	166	(31)	-18.7%
2001-02	139	135	4	3.0%
2002-03	108	139	(31)	-22.3%
2003-04	153	108	45	41.7%
2004-05	123	153	(30)	-19.6%
2005-06	151	123	28	22.8%
2006-07	153	151	2	1.3%



- Up 107.8% over the last 10 years, compared to a national average of down 21.6%
- Retained **106** first-time players in 2007-08, up from **51** in 1998-99
- Retention rank: 33rd in the country in 2007-08

Geo	Georgia Retention of New Players				
Season	Ret	vs PY#	*+/-	vsPY%	
1998-99	51	N/A	N/A	N/A	
1999-00	98	51	47	92.2%	
2000-01	117	98	19	19.4%	
2001-02	94	117	(23)	-19.7%	
2002-03	101	94	7	7.4%	
2003-04	89	101	(12)	-11.9%	
2004-05	96	89	7	7.9%	
2005-06	87	96	(9)	-9.4%	
2006-07	108	87	21	24.1%	
2007-08	106	108	(2)	-1.9%	



Georgia

RETENTION RATE

- Retention rate of 69.3% in 2007-08, compared to a national average of 69.1%
- Retention rate rank: 24th in the country in 2007-08

Georgia Rate of Retaining New Players					
Season	Rate	Rank			
1998-99	79.7%	N/A			
1999-00	73.1%	N/A			
2000-01	70.5%	N/A			
2001-02	69.6%	N/A			
2002-03	72.7%	N/A			
2003-04	82.4%	N/A			
2004-05	62.7%	N/A			
2005-06	70.7%	N/A			
2006-07	71.5%	N/A			
2007-08	69.3%	24			
10-year average	72.2%	15			

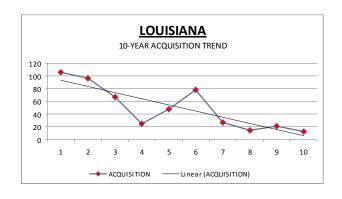
- Acquisition has grown tremendously over the past 10 years, especially the 1998-99 and 1999-00 seasons.
- Retention has also grown consistently along side acquisition, with only one significant drop (2001-02).
- Retention rate is consistently above the national average over the past 10 years.

Louisiana

ACQUISITION

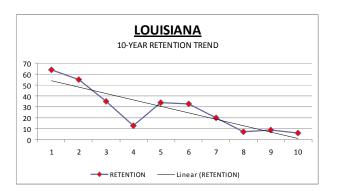
- Down 88.7% over the past 10 years, compared to a national average of down 22.1%
- Acquired 12 first-time players in 2006-07, down from 106 in 1997-98
- Acquisition rank: 49th in the country in 2006-07

Louisiana Acquisition of New Players					
Season	New vs PY# *+/- vs PY				
1997-98	106	N/A	N/A	N/A	
1998-99	96	106	(10)	-9.4%	
1999-00	67	96	(29)	-30.2%	
2000-01	25	67	(42)	-62.7%	
2001-02	48	25	23	92.0%	
2002-03	78	48	30	62.5%	
2003-04	27	78	(51)	-65.4%	
2004-05	14	27	(13)	-48.1%	
2005-06	21	14	7	50.0%	
2006-07	12	21	(9)	-42.9%	



- Down 90.7% over the last 10 years, compared to a national average of down 21.6%
- Retained 6 first-time players in 2007-08, down from 64 in 1998-99
- Retention rank: 49th in the country in 2007-08

Louisiana Retention of New Players						
Season	Season Ret vs PY# *+/- vsPY%					
1998-99	64	N/A	N/A	N/A		
1999-00	55	64	(9)	-14.1%		
2000-01	35	55	(20)	-36.4%		
2001-02	13	35	(22)	-62.9%		
2002-03	34	13	21	161.5%		
2003-04	33	34	(1)	-2.9%		
2004-05	20	33	(13)	-39.4%		
2005-06	7	20	(13)	-65.0%		
2006-07	9	7	2	28.6%		
2007-08	6	9	(3)	-33.3%		



Louisiana

RETENTION RATE

- Retention rate of 50.0% in 2007-08, compared to a national average of 69.1%
- Retention rate rank: 47th in the country in 2007-08

Louisiana Rate of Retaining New Players					
Season	Rate	Rank			
1998-99	60.4%	N/A			
1999-00	57.3%	N/A			
2000-01	52.2%	N/A			
2001-02	52.0%	N/A			
2002-03	70.8%	N/A			
2003-04	42.3%	N/A			
2004-05	74.1%	N/A			
2005-06	50.0%	N/A			
2006-07	42.9%	N/A			
2007-08	50.0%	47			
10-year average	55.2%	49			

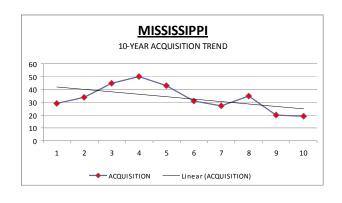
- Acquisition has consistently dropped over the past 10 years with the exception of 2001-02 and 2002-03.
- Retention has followed a similar path, down eight of the past 10 seasons.
- Retention rate is a product of the small acquisition numbers and is well below the national average.

Mississippi

ACQUISITION

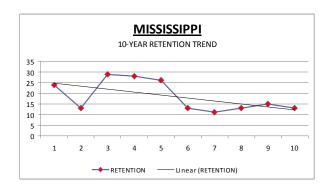
- Down 62.0% over the past 10 years, compared to a national average of down 22.1%
- Acquired 19 first-time players in 2006-07, down from 29 in 1997-98
- Acquisition rank: 48th in the country in 2006-07

Mississippi Acquisition of New Players					
Season	New	New vs PY# *+/-		vs PY%	
1997-98	29	N/A	N/A	N/A	
1998-99	34	29	5	17.2%	
1999-00	45	34	11	32.4%	
2000-01	50	45	5	11.1%	
2001-02	43	50	(7)	-14.0%	
2002-03	31	43	(12)	-27.9%	
2003-04	27	31	(4)	-12.9%	
2004-05	35	27	8	29.6%	
2005-06	20	35	(15)	-42.9%	
2006-07	19	20	(1)	-5.0%	



- Down 55.2% over the last 10 years, compared to a national average of down 21.6%
- Retained 13 first-time players in 2007-08, down from 24 in 1998-99
- Retention rank: 48th in the country in 2007-08

Mississippi Retention of New Players					
Season	son Ret vs PY# *+/- vsPY%				
1998-99	24	N/A	N/A	N/A	
1999-00	13	24	(11)	-45.8%	
2000-01	29	13	16	123.1%	
2001-02	28	29	(1)	-3.4%	
2002-03	26	28	(2)	-7.1%	
2003-04	13	26	(13)	-50.0%	
2004-05	11	13	(2)	-15.4%	
2005-06	13	11	2	18.2%	
2006-07	15	13	2	15.4%	
2007-08	13	15	(2)	-13.3%	



Mississippi

RETENTION RATE

- Retention rate of 68.4% in 2007-08, compared to a national average of 69.1%
- Retention rate rank: **25**th in the country in 2007-08

Mississippi Rate of Retaining New Players					
Season	Rate	Rank			
1998-99	82.8%	N/A			
1999-00	38.2%	N/A			
2000-01	64.4%	N/A			
2001-02	56.0%	N/A			
2002-03	60.5%	N/A			
2003-04	41.9%	N/A			
2004-05	40.7%	N/A			
2005-06	37.1%	N/A			
2006-07	75.0%	N/A			
2007-08	68.4%	25			
10-year history	56.5%	48			

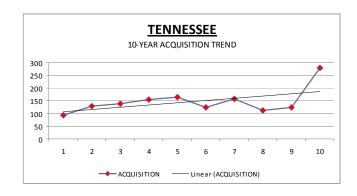
- Acquisition is down in five of the past six seasons.
- Retention is also performing well below the national average.
- Retention rate has improved over the past two seasons, but is well below the national average over the past 10.

Tennessee

ACQUISITION

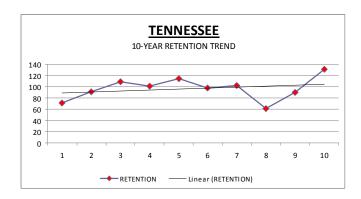
- Up 195.7% over the past 10 years, compared to a national average of down 22.1%
- Acquired 278 first-time players in 2006-07, up from 94 in 1997-98
- Acquisition rank: 27th in the country in 2006-07

Tennessee Acquisition of New Players					
Season	New	vs PY#	*+/-	vs PY%	
1997-98	94	N/A	N/A	N/A	
1998-99	129	94	35	37.2%	
1999-00	139	129	10	7.8%	
2000-01	154	139	15	10.8%	
2001-02	165	154	11	7.1%	
2002-03	124	165	(41)	-24.8%	
2003-04	156	124	32	25.8%	
2004-05	111	156	(45)	-28.8%	
2005-06	124	111	13	11.7%	
2006-07	278	124	154	124.2%	



- Up 84.5% over the last 10 years, compared to a national average of down 21.6%
- Retained **131** first-time players in 2007-08, up from **71** in 1998-99
- Retention rank: 29th in the country in 2007-08

Tennessee Retention of New Players						
Season	Ret vs PY# *+/- vsP					
1998-99	71	N/A	N/A	N/A		
1999-00	91	71	20	28.2%		
2000-01	109	91	18	19.8%		
2001-02	101	109	(8)	-7.3%		
2002-03	114	101	13	12.9%		
2003-04	98	114	(16)	-14.0%		
2004-05	102	98	4	4.1%		
2005-06	61	102	(41)	-40.2%		
2006-07	90	61	29	47.5%		
2007-08	131	90	41	45.6%		



Tennessee

RETENTION RATE

- Retention rate of 47.1% in 2007-08, compared to a national average of 69.1%
- Retention rate rank: **48**th in the country in 2007-08

Tennessee Rate of Retaining New Players					
Season	Rate	Rank			
1998-99	75.5%	N/A			
1999-00	70.5%	N/A			
2000-01	78.4%	N/A			
2001-02	65.6%	N/A			
2002-03	69.1%	N/A			
2003-04	79.0%	N/A			
2004-05	65.4%	N/A			
2005-06	55.0%	N/A			
2006-07	72.6%	N/A			
2007-08	47.1%	48			
10-year history	67.8%	26			

- Acquisition has been strong, anchored by an increase of 154 skaters last season.
- Retention has also been strong as a result of the increased acquisition numbers.
- Retention rate started the 10-year period off strong, but has declined quickly over the past few years. Overall, it is consistent with the national average.

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^{th} of 50 states in acquisition. The following season, they were 18^{th} of 50 states in retention and 40^{th} of 50 states in retention rate. Over the past 10 years, Alaska has retained 66.1% of first-year participants, which is 30^{th} of 50 states

	2006	10-year A	verage			
	2006-07		7-08	1997-982007-08		
STATE	ACQ	RET.	RET.RATE	RETEN'		
	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	
со	12	11	3	77.5%	2	
СТ	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	
ОН	11	11	19	75.5%	6	
ОК	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		71.5%	17	
VA			21	66.6%		
	19	20	38		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

