Growing the Game



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May 13, 2017



Purpose

- Create growth programs that can be replicated
- Educate local associations, rinks and volunteers on best practices
- Address issues related to acquisition and retention
- Drive both overall participation growth in hockey and registration in USA Hockey
- Provide 2 and 2 Challenge goals for all levels





Historical Perspective

| NATIONAL 8U BOYS AND GIRLS | | | | | |
|----------------------------|---------|---------|---------|---------|---------|
| | 12-13 | 13-14 | 14-15 | 15-16 | 16-17 |
| TOTAL | 102,956 | 103,961 | 105,925 | 107,703 | 115,694 |
| | -4.1% | 1.0% | 1.9% | 1.7% | 7.4% |
| NEW | 41,000 | 44,628 | 45,480 | 45,539 | 52,076 |
| RETAINED | 61,956 | 59,333 | 60,445 | 62,164 | 63,618 |

- Driven by significant growth from NEW players
 - ■NEW player boost thanks to NHL Learn-to-Play initiative (14.4% or +6,537)
 - Highest 8 & under total in USA Hockey history
- •The highly important 6U group grew for the 3rd straight year
- •Girls hockey grew by +12.0% (4th straight year)
 - •20,558 girl players is the highest TOTAL ever



Massachusetts Perspective

| MASSACHUSETTS 8U BOYS AND GIRLS | | | | | |
|---------------------------------|--------|--------|--------|--------|--------|
| | 12-13 | 13-14 | 14-15 | 15-16 | 16-17 |
| TOTAL | 13,305 | 13,326 | 13,862 | 13,098 | 13,196 |
| | -7.0% | 0.2% | 4.0% | -5.5% | 0.7% |
| NEW | 5,491 | 5,872 | 6,100 | 5,147 | 5,709 |
| RETAINED | 7,814 | 7,454 | 7,762 | 7,951 | 7,487 |

- 8U grew overall by 0.7% (98)
 - Girls' participation increased by +4.1% (117) for a new 5-year high
- +10.9% (562) INCREASE in NEW players
 - Largest increase of new players over last five seasons
- -5.8% (464) decrease in RETAINED players
 - Decrease is due to a smaller pool of players from 2015-16



Target Market

| AGE | NEW | REPEAT |
|-----|-------|--------|
| 4 | 83.4% | 16.6% |
| 5 | 64.4% | 35.6% |
| 6 | 46.4% | 53.6% |
| 7 | 31.7% | 68.3% |
| 8 | 25.1% | 74.9% |
| 9 | 15.1% | 84.9% |
| 10 | 11.0% | 89.0% |
| 11 | 8.0% | 92.0% |
| 12 | 6.1% | 93.9% |
| 13 | 4.7% | 95.3% |
| 14 | 4.0% | 96.0% |

New players

There are more than 3.2x the number of New 8U (52,076) than New 9-14 YOs (15,198)

Retained Players

- 49.8% -8 & Under
- 91.8% -- 9 to 14



Long-Term Growth

| BOYS & GIRLS AGE POPULATION | | | | | |
|-----------------------------|---------|---------|---------|---------|---------|
| | 12-13 | 13-14 | 14-15 | 15-16 | 16-17 |
| | | | | | |
| 9 TO 14 | 175,867 | 177,906 | 181,107 | 183,275 | 184,502 |
| % | 0.6% | 1.2% | 1.8% | 1.2% | 0.7% |

Seventh year in a row 9 to 14 has grown as a result of more players graduating from 8 & under

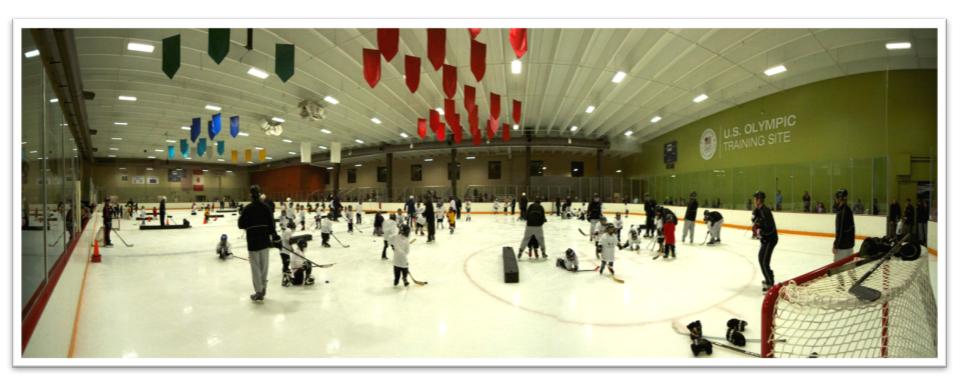


Massachusetts Success

- 11 associations completed the 2 and 2 Challenge
 - 6 Gold Status (earns \$250 in Total Hockey credit)
 - Amherst Hockey Association
 - Franklin Youth Hockey
 - King Philip/Walpole Youth Hockey
 - Medford Recreational Hockey Association
 - Wakefield Youth Skating Association
 - Walpole Express Youth Hockey
 - 5 Bronze Status (earns \$100 in Total Hockey credit)
 - Junior Crusaders Youth Hockey
 - North Central MA Youth Hockey
 - North Reading Skating Association
 - South Shore Eagles
 - Winthrop Youth Hockey



2 and 2 Challenge in 2017-18



A Guide to Drive 8 & Under Participation for Your Local Association



2 and 2 Challenge



To complete the 2 and 2 Challenge, participating associations will utilize three programs that drive growth

- 1. Retention
 - Welcome Back Week
 - September 18-24, 2017
- 2. Acquisition
 - Try Hockey For Free Days
 - November 4, 2017 and
 - March 3, 2018
- 3. Conversion
 - Transition Program
 - Follows Try Hockey For Free Day



Olympic Cycle



Olympic Year

Pyeongchang Winter Olympics

Post Olympic Year

- Key acquisition year
- 2014 Olympics produced a 8.8% jump in new 8 & under players

Post Olympic Year 2

Big retention year





Welcome Back Week

Welcome Back Week (Retention):

September 18th – 24th

 Local volunteers make phone calls to families and invite kids back for another season

Local Association Coordinates:

Calls unregistered families to invite them back



USA Hockey Provides:

- Email reminders to unregistered families
- Sends recorded phone message reminder from an Olympian or NHL player
- Step-by-step instructions
- List of players that need a personal phone call (in portal)



Welcome Back Week



August 22nd:

- Email to 2015-16 8U players that need to register for 2016-17 season
- Step-by-step instructions

September 7th:

- Prerecorded :30 phone call sent
 - 37,939 total calls sent last year
 - 6,010 calls from Kendall Coyne
 - 5,254 calls from Auston Matthews

September 18th – 24th:

- Associations:
 - Download list of players that need a call
 - Coordinate personal phone calls to unregistered families



Try Hockey For Free Days

Try Hockey For Free Day (Acquisition):

November 4th & March 3rd

 Provide an opportunity to acquire new local players by hosting kids between the ages of 4 to 9



Local Association Coordinates:

- One hour of ice
- Volunteers
- Equipment to lend

USA Hockey Provides:

- 40 USA Hockey jerseys & giveaways
- On- and off-ice clinic guidelines
- USA Hockey Sanctioning
- Online registration
- Grassroots promotional tools
- Best practices on attracting new families
- National marketing



2016-17 Try Hockey For Free Days

- November 12th:
 - 493 host sites (25)
 - 48 states
 - 13,582 participants (853)
 - Average 28 participants/site
 - 1 out of every 4 were girls

- February 25th:
 - 382 host sites (17)
 - 45 states
 - 13,256 participants (393)
 - Average 35 participants/site
 - 1 out of every 4 were girls

26,838 NEW kids tried hockey at 813 host locations

In MA, 1,246 kids participated at 42 host sites



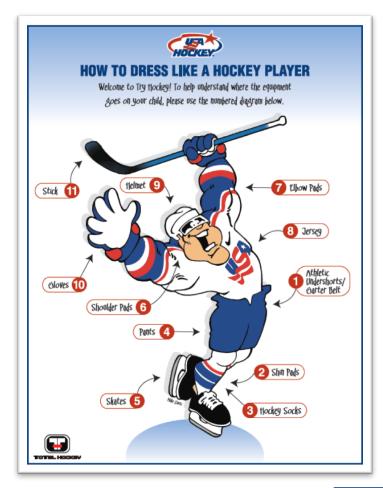
Equipment

Minimum Requirements:

- 40 Helmets
- 40 Skates
- 40 Gloves (can be winter gloves)

Tips:

- Utilize OneGoal gear when possible
 - Visit <u>www.TotalHockey.com</u> for more details.
- Solicit equipment donations
- Borrow equipment from association members

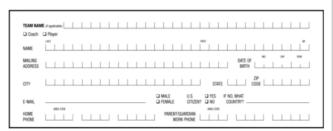




Sanctioning

Sanctioning Process:

- We will contact your Associate Registrar
- Minimum equipment required
 - Helmet, gloves & skates
- Cost of Admission
 - Either online registration at www.TryHockeyForFree.com
 - Completed IMR/Waiver
 - Uploaded offline to your registration portal
- Properly registered coaches to be on the ice
- IMR's must be completed in full





Waiver of Liability, Release Assumption of Risk & Indemnity Agreement



It is the purpose of this agreement to exempt, waive and relieve releasees from liability for personal injury, properly damage, and wrongful death, including if caused by negligence, including the negligence, if any, of releasees. "Releasees" include USA Rockey, Inc., its affiliate associations, local associations, member thams, event hosts, other participants, coaches, officials, sponsors, advertisers, and each of them, their officers, directors, agents and

For and in consideration of the undersigned participant's registration with ISSA Hockey, in c. its affiliatis, local associations and member teams all referred to together as USAH3 and being allowed to participate in USAH events and member team activities, participant (and the perents) or legal guardancia of participant, if applicable valves, refease and refinguish any and all claims for isolitify and causely of action, including for personal injury, properly damage or wrongful death occurring to participant, arising out of participants in USAH events, member than activities, the sport of or booking, and/or activities incidental thereto, whenever or however they occur and for such period said activities may continue, and by this agreement as year, claims, right, and activities may continue, and by this agreement as year, claims, right, and participant or action that perfocipant participant's perents) or legal quardancia, if applicability may be are hereby wwished, released and refinagiated, and participant (and parentis/jupradrancy). If applicable is only all participant and assists.

Puricipant and periodipant is periodipant by apmentisyloguardipants, if applicable) acknowledge, understand and assume all risks relating to be hockey and any member team activities, and understand fast to hockey and energher team activities involve risks to participants person including bodily injury, partial or total disability, partialy sear do that disability participants on the negligence of the participant is not engigence of others, including the "rielasses" identified below. These risks and dangers may be caused by the negligence of the participant is not be hoped and stronger participants, but howe arising thom participants will increase if participant activities in hooky and member team activities in an age group above that which participant would normally participants in low or not reasonably foreseenbel at this time. Participant (and participants perentisyloguardinsis), if applicable acknowledge, understand and agree that all of the risks and dangers.

described throughout this agreement, including those caused by the negligence of participant and/or others, are included within the walver, release and reinlequishment described in the preceding paragraph. Whe agree to able by and be bound under the rules of USA Hockey, including the By-Laws of the corporation and the arbitation clause provisions, as currently published. Oppies are available to USA Hockey members upon written receive.

Participant and participant's parentis/quardianosi, if applicable) actionwise(ps. understand and assume the risks, if any, arising from the conditions and use of ice bookey rinks and related premises and acknowledge and understand that included within the scope of this waiver and related area used action including any cause of action based on negligency aiming from the performance, or failure to perform, maintenance, inspection, supervision or control of said areas and for the failure to warm of dangerous conditions existing at said inks, for negligent selection of certain releases, or negligent supervision or instruction by releasees.

If the law in any controlling jurisdiction renders any part of this agreement unenforceable, the remainder of this agreement shall nevertheless remain enforceable to the liet extert, if any, allowed by controlling law. This agreement affects your legal rights, and you may wish to consult an attorney concerning this agreement.

Participant (and participant's parent(s)/guardian(s), if applicable) agree if any claim for participant's personal injury or wrongful death is commenced against releases, hother shall defent, indomenity and sust harmless releases from any and all claims or causes of action by whomever or wherever made or presented for participant's personal injuries, property damage or wrongful Author.

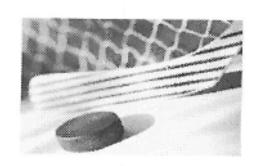
Participant (and participant's parentis/guardians), if applicable acknowledge that they have been provided and have read the above paragraphs and have not relied upon any representations of releaseses, that they are this advised of the potential dangers of ico bookey and understand these values and releases are necessary to allow another to hockey to seat in its present form. Significant exclusions may apply to USA hockey's issuance policies, which could affect any coverage, for example, there is no liability coverage for claims of one player against another player. Read your brochure carefully and, if you have any questions, contact USA hockey or of botics flisk Manager.

| CIPANT SIGNATURE | Age | Date Signed | |
|---|-----|-------------|--|
| CIPANT NAME (piesse print) | | | |
| | | Date Signed | |
| NT OR GUARDIAN SIGNATURE of conference in 17 years of age or structured | | | |



Marketing

TRY HOCKEY FOR FREE





FREE ICE HOCKEY SATURDAY!

Hockey Weekend Across America

Have you ever wanted your child to try ice hockey but never had the opportunity? Well the wait is over because we are offering children and adults a chance to see why ice hockey is the greatest sport around! Teamwork, Work Ethic, Exercise, Build Character and the MOST FUN you will ever have!!!... Hockey offers it all!!!

Vhen: Saturday, January 30th, 1:00pm-2:00pm

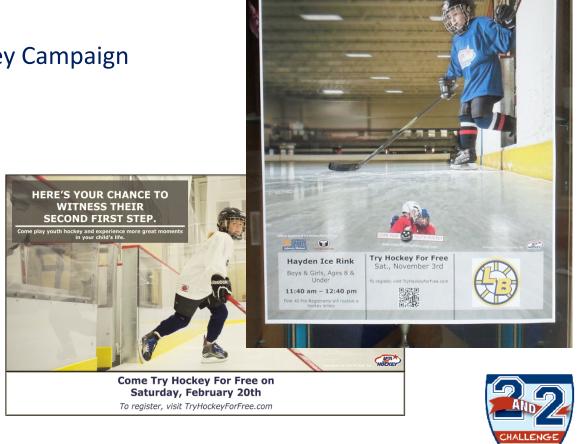


Marketing

Customizable

- Come Play Youth Hockey Campaign
 - Flyers & Posters
 - English & Spanish
- Commercials

*Available to download on



HERE'S YOUR
CHANCE TO WITNESS THEIR
SECOND FIRST STEP.

Try Hockey Marketing



Holiday Cards

- Each host site will receive 1,000 cards
- A template to customize back available
- Distribute the cards to families in your association
- Hand them out at school parties





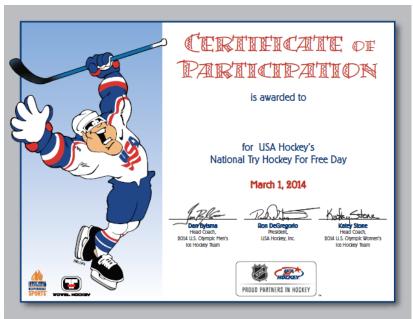
Marketing

HTML Invitation

Send to coworkers

Participation Certificates

- 40 for each host site
- Customize for each participant
 - Template available or hand-write







Marketing

Pencils or Bracelets

- 100 for each host site
- Have the kids in your association distribute to their friends

*These are a pre-event marketing tool







WWW.TRYHOCKEYFORFREE.COM Nov 12, 2016







FOR IMMEDIATE RELEASE CONTACT: (ORGANIZATION CONTACT, PHONE NUMBER)

(Organization Name) Invites Kids to (Rink Name) to Try Hockey For Free as part of USA Hockey's Hockey Weekend Across America Celebration Feb. 20 - 22.

(MONTH DATE, YEAR)



theme, including

y.com on Friday, Feb. 20; To elebrate Local Hockey Heroes, cross America, visit

10-Day Social Media Calendar

- Facebook
- **Twitter**

Distribute Press Release to:

- **Newspapers**
- TV stations
- Radio
- Community websites
- Parent-oriented publications
- Neighborhood **Newsletters**





Conversion

...second step in generating sustained growth
Without a program to place NEW players in, associations will not
convert new families into youth hockey families







2 and 2 Challenge in 2016-17

Transition Program (Conversion):

Begins after Try Hockey For Free Day

A low-cost, low-commitment program to ease the transition of new

families to youth hockey

Local Association Coordinates:

- Low-cost, low-commitment introductory program
- Volunteers to personally invite Try Hockey families
- Equipment to lend

USA Hockey Provides:

- Best practices on developing a transition program
- USA Hockey Sanctioning*





Transition Program

Learn-to-Skate

 A program designed to help young skaters become more confident on their skates.

Learn-to-Play

 A program that focuses on skating skills, but also teaches the basic skills of stickhandling, shooting and passing.

Follow up

- Your Try Hockey event is a great opportunity to capture contact information to fill future programs.
- Be sure to reach out and invite them to join your summer or fall youth hockey program.

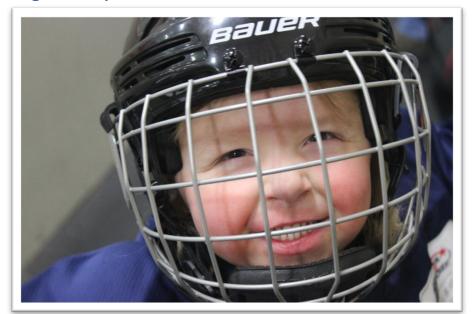




2 and 2 Challenge in 2016-17

Membership Discount Program

- Only available for Nov. 4th Try Hockey participants
 - Participants must be between 7 12 years old
 - No cost for USA Hockey membership with code
 - Must register by December 31, 2017





Rewards

Participate in all three growth initiatives

- Welcome Back Week
- Try Hockey For Free Days (Nov. 4th AND March 3rd)
- Transition Program

Rewards:

- Banner for display in your rink
- \$100 credit at Total Hockey





Silver Status

Participate in at least one more growth initiative

- Girls' Hockey Weekend (Oct. 7th & 8th)
- Organize a female focused initiative within your coed 8 & under program
- Provide Transition Program after each Try Hockey For Free event (Nov. 4th & March 3rd)



Rewards:

\$200 credit at Total Hockey



2 and 2 Challenge in 2016-17

Girls' Hockey Weekend (Retention & Acquisition):

October 7th - 8th

Build awareness, celebrate girls playing the sport and grow participation



 Hosting a Try Hockey For Free, Cross-Ice Jamboree, Season Kick-Off Party, or an original event

USA Hockey Provides:

- Goodie bags
- Best practices guidelines
- Last Season 129 host sites Top Country



Gold Status

Participate in at least two additional growth initiatives

- Host a Season Ice Breaker
- Apply for a Growth Grant
- Purchase OneGoal starter equipment
- Hold an equipment drive

Rewards:

\$250 credit at Total Hockey





THREE PROMISES

Top 3 Reasons Parents Choose Youth Hockey

- 1. Promise of fun
 - Very cool venue
 - Unique equipment
 - Flying on ice with your friends
- 2. Promise of guidance, instruction, attention, help
 - Hockey is complex requires high-skills, multiple skills
- 3. Promise of achievement
 - Measurable improvement feeds both parents and child



Membership Development

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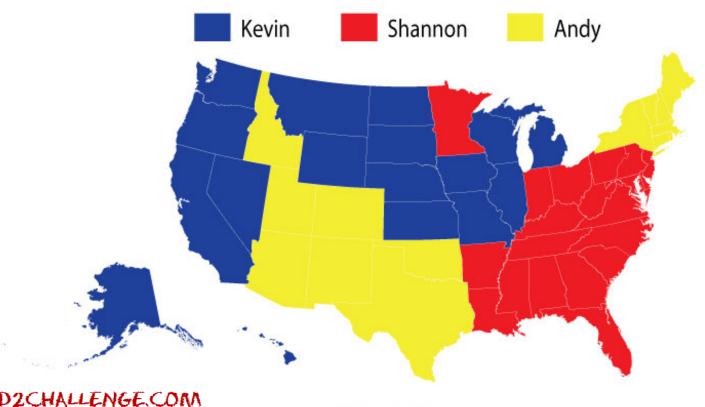
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