



DESIGN ANALYSIS SPRING 2008

# NHL FANDOM

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# Objective

1. Identify what motivates engagement with professional sports.  
(What makes a fan, a fan?)



Objective

**2. Consider opportunity areas to increase hockey's fan base.**

**Insight Matrix**

**Semantic Profile**

**Position Maps**

**Era Analysis**

**Value Web**

**Fan Types**

**Activities Relationships**

# What contributes to meaningful experiences for sports fans?

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### Favorite Fan Experiences

Playing the game

Sharing with family

Childhood memory

Games/food

Fan community

Social/Pre party

Going to the game

Underdog win/close games

“Finals”

Rivalry

Team ID

Player ID

Source: Online survey probing sports fans' favorite experiences.

### Fan Drivers

**Entertainment:** Sports spectatorship is a form of leisure.

**Escapism:** Being a fan gives one an excuse to yell at something, an activity that may be constrained in other areas of one's life. A combination of euphoria and stress for which they coin the name “eustress.”

**Aesthetics:** Some people are fans simply because they appreciate the aesthetics of the game, such as the precision or skill of play.

**Family Bonding:** Fans going on a family outing to watch a sports event form a psychological bond with one another as a family.

**Self-esteem:** Fans identify with their teams to the extent that they consider themselves successful when their teams have been successful.

Source: Sports Psychologist Dan Wan, Murray State University

# Insight Matrix

## What contributes to meaningful experiences for sports fans?

Measures favorite sporting experience attributes against fan drivers.

	Entertainment	Escapism	Self Esteem	aesthetics	Family Bonding
Playing the game	1	1	0	3	3
Sharing with family	0	1	0	0	3
Childhood memory	0	0	0	0	3
Games/food	2	0	0	0	1
Fan community	2	2	1	0	0
Social/pre-party	3	2	0	0	0
Going to the game	3	3	1	1	2
Under dog win/close game	3	3	2	2	1
"Finals"	3	3	3	2	1
Rivalry	2	3	3	0	1
Team ID	1	2	3	0	2
Player ID	1	3	3	1	2

# Insight Matrix

## Key Insights

**Personally Rooted** and **Competitive** experiences are important drivers for influencing fan engagement.

**1.** Personal roots with the game, whether from playing the game oneself or sharing hockey experiences with family, drive lasting meaning for sports fans.

**2.** Competition intensifies the escapist attributes of and overall fan pleasure derived from sports.

**2.** Ability to identify with players further drives fan satisfaction.

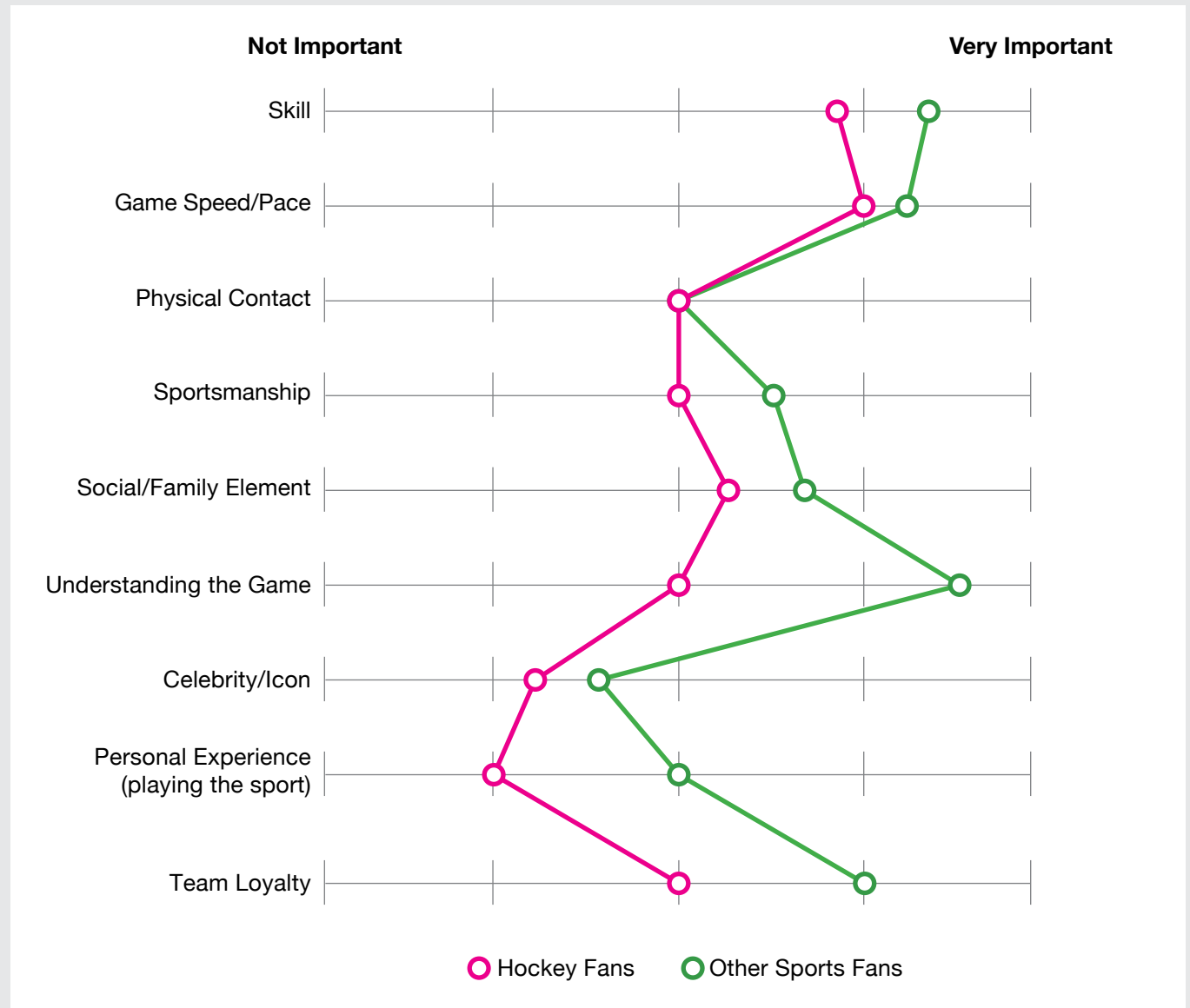
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# Semantic Profile

## What contributes to engaging with some sports over others?

Compares importance of game and experience attributes between hockey fans and fans of other sports.



# Semantic Profile

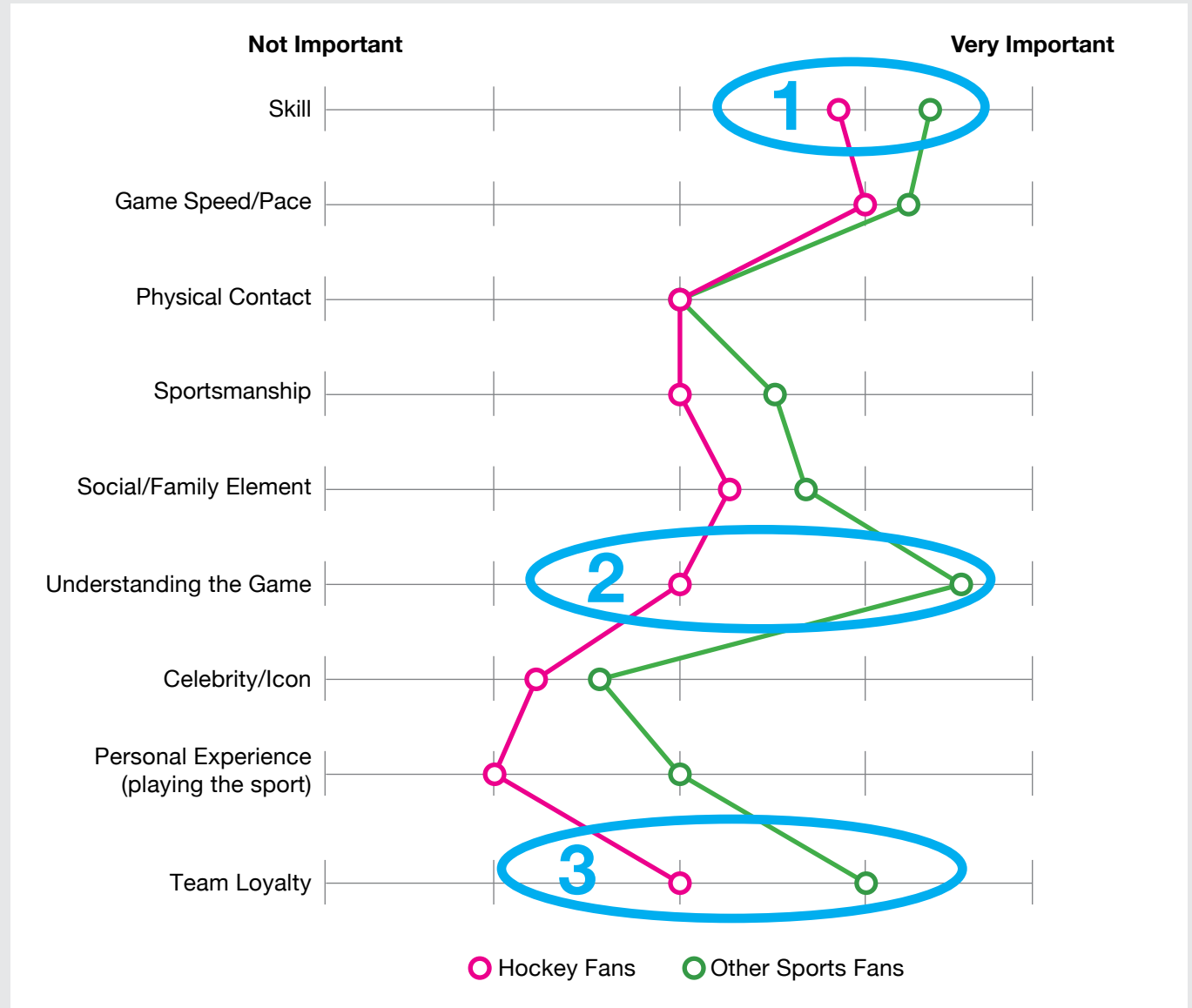
## Findings

**1.** Perceived **Skill** and **Game Speed/Pace** are important game attributes that influence a fan's engagement in any sport.

**2.** **Understanding the Game** is deemed more important to other sports fans than to hockey fans.

**3.** **Team Loyalty** is more important to fans of other sports than to hockey fans.

## What contributes to engaging with some sports over others?



## Semantic Profile

### Key Insights

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What should be hockey's greatest asset is lost on fans of other sports.

Efforts to measure the game's fan base will reveal better understanding of the game.

### What contributes to engaging with some sports over others?

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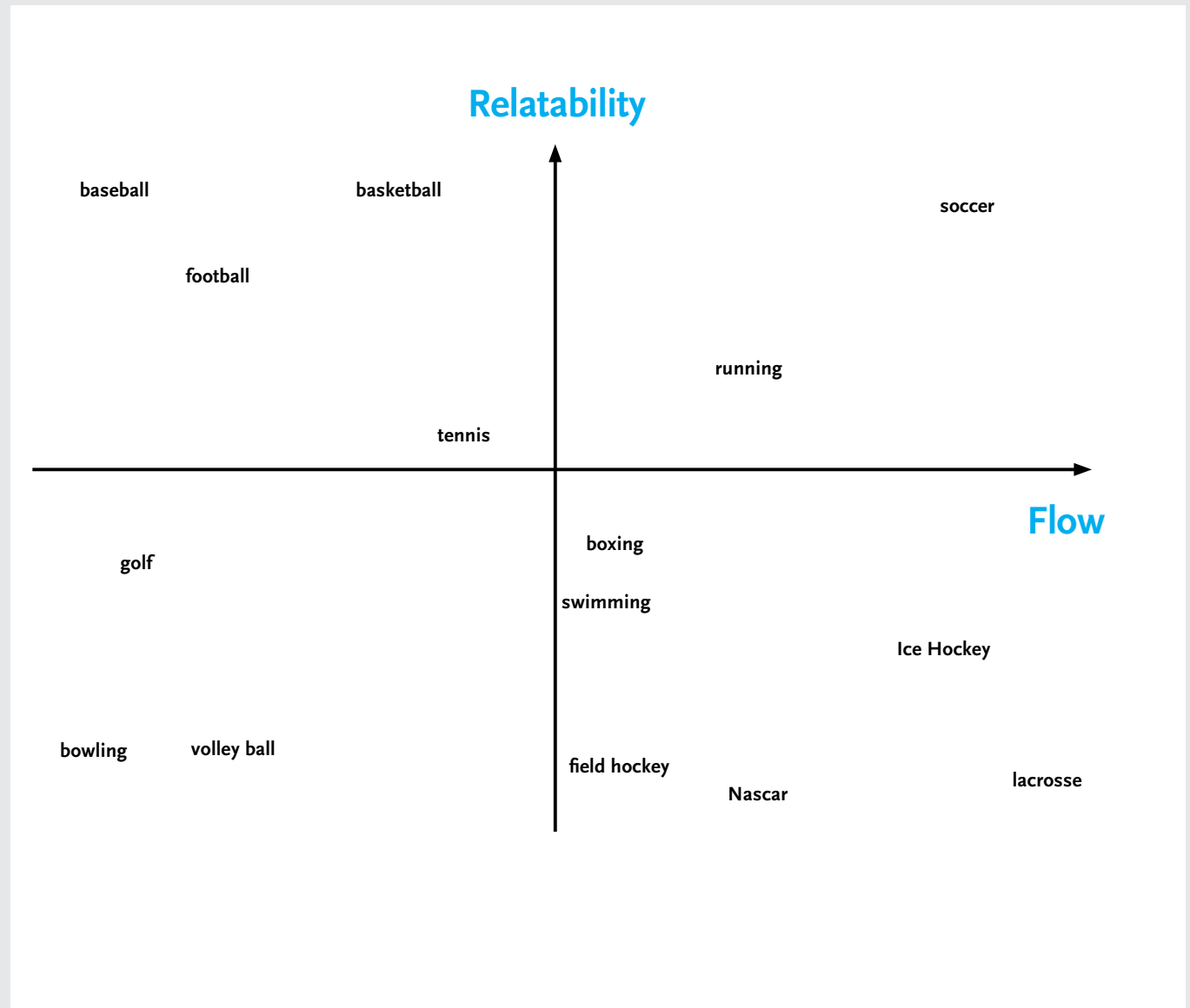
- 1) Why does hockey suffer a disadvantage in perceived skill and pace of the game and understanding of the game?**
- 2) Why does this matter?**

## Position Map

## Subjective measurement of popular sports positioned by “reliability” and “flow.”

**Relatability:** the ability of fans to connect to the sport through personal experiences built playing the game oneself.

**Flow:** the degree of fluidity in game style, such that the game relies on a constant flow of movement, effort, and on-the-fly instinctive play. Low-flow sports have more frequent interruptions for managing plays.



## Position Map

### Key Insights

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**Question:** How do other sports contribute to a meaningful understanding of the game?

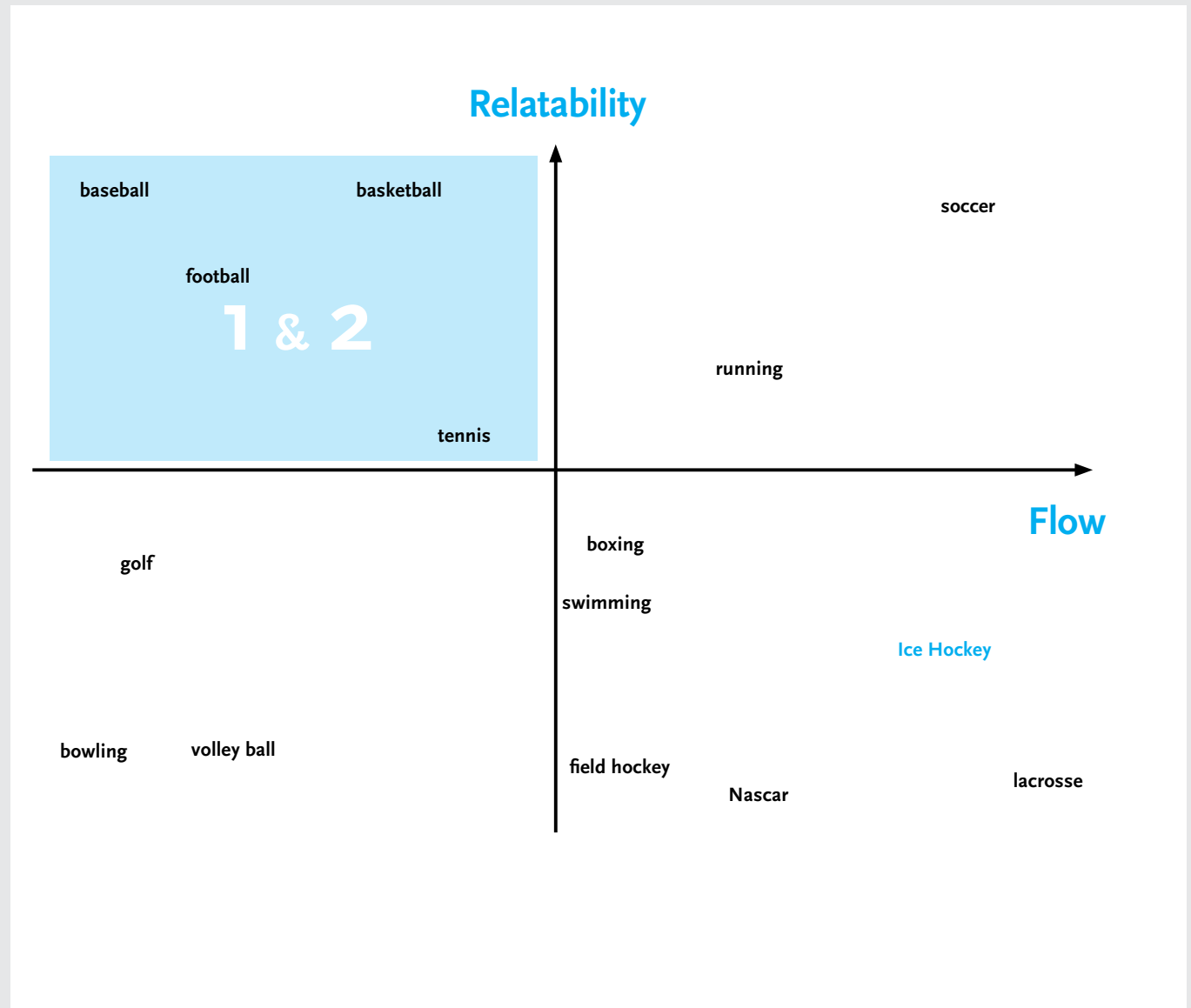
**Answer:** Leading competitor sports are highly relatable AND low on flow.

This suggests:

1. That attempts to compete with these sports for fan following will require improved “backyard” access to build hockey’s relatability over time.
2. Fans want to have to think about the game and may respond more to hockey if it can better engage them on game strategy.

## Subjective measurement of popular sports positioned by “relatability” and “flow.”

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# To better understand the history of the game, its traditions, and key league events, the team explored an era analysis.

	early 1800's-1915 The Establishment Years	1915-1942 The Golden Age	1942-1967 The Original Six	1967-1980 The Miracle on Ice	1980-2004 Internationalism	2004-present The Lockout
						
<b>ICE HOCKEY EVENTS</b>	<ul style="list-style-type: none"> <li>• Early to mid-1800s: Ice hockey as we know it is first played in either Nova Scotia, Ontario or Quebec.</li> <li>• 1877: The first known rules are published by the Montreal Gazette.</li> <li>• 1889 or 1890: The first women's hockey game is played in Ottawa or Ontario.</li> <li>• Late 1900s and early 1900s: North American ice hockey appears in European countries.</li> </ul>	<ul style="list-style-type: none"> <li>• 1920: An ice hockey tournament is played at the Summer Olympics. It will later be declared the first World Ice Hockey Championship. Canada wins.</li> <li>• 1924: Ice hockey debuts at the Winter Olympics. Canada wins gold medal.</li> </ul>	<ul style="list-style-type: none"> <li>• 1956: The USSR enters Olympic ice hockey for the first time, winning the gold medal.</li> </ul>	<ul style="list-style-type: none"> <li>• 1972: The Summit Series pits the best Canadian professionals against the best from the Soviet Union.</li> <li>• 1973: The World Hockey Association begins play, outbidding NHL teams for several star players. Bobby Hull becomes hockey's first million-dollar man when he leaves the Chicago Black Hawks and signs a 10-year, \$270 million contract with the NHL's Winnipeg Jets.</li> <li>• 1975: Soviet club teams play in North America for the first time when Central Red Army and Soviet Wings play a series of exhibition games against NHL teams.</li> </ul>	<ul style="list-style-type: none"> <li>• 1990: Canada wins the first Women's World Hockey Championship.</li> <li>• 1998: NHL players compete at the Olympics for the first time, with the Czech Republic winning the gold medal.</li> <li>• 1998: The United States defeats Canada to win the first Olympic gold medal in women's hockey.</li> <li>• 2002: The Winter Olympics feature a highly contested US vs Canada final with many NHL players. The Canadians take the gold medal with a 5-3 victory.</li> </ul>	<ul style="list-style-type: none"> <li>• 2004: The US wins its first ever World Junior Hockey Championship.</li> </ul>
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<b>NHL ICONS</b>	<ul style="list-style-type: none"> <li>• 1885: Lord Stanley (Governor-General of Canada), awards a trophy to the Montreal Amateur Athletic Association hockey club of the Amateur Hockey Association of Canada (the trophy will come to be known as the Stanley Cup).</li> </ul>	<ul style="list-style-type: none"> <li>• Ottawa Senators become the league's first dynasty, winning four Cups from 1920-1927.</li> </ul>	<ul style="list-style-type: none"> <li>• 1942: The Brooklyn Americans withdraw from the NHL. For the next 25 years, the league will be composed of the Canadiens, Maple Leafs, Red Wings, Bruins, Rangers and Black Hawks, now known as "The Original Six".</li> <li>• 1948: The Canadiens begin their three- decade domination of the NHL, winning 17 championships from 1948 to 1979.</li> </ul>	<ul style="list-style-type: none"> <li>• 1980: The United States defeats the USSR in the semifinal and Finland in the final to win the Olympic gold medal. The "Miracle on Ice" will be enshrined as one of the greatest moments in American sports history.</li> </ul>	<ul style="list-style-type: none"> <li>• 1984: Wayne Gretzky (The Great One) and the Edmonton Oilers won his Stanley Cup titles from 1984 to 1990.</li> </ul>	
<b>FAN TRENDS</b>	<ul style="list-style-type: none"> <li>• 1894: The first artificial ice rink is opened in Baltimore.</li> <li>• 1920: College athletes from the United States and Canada play the first international series of matches, with the Canadians winning all four games (college and club teams in the Eastern US soon take up the game).</li> </ul>	<ul style="list-style-type: none"> <li>• 1923: Foster Hewitt calls the first hockey broadcast for radio, an intermediate game between teams from Kitchener and Toronto.</li> <li>• 1938: The New York Americans defeat Toronto 3-2 in the first game to be broadcast coast-to-coast in Canada.</li> </ul>	<ul style="list-style-type: none"> <li>• 1952: Hockey Night in Canada makes its television debut.</li> <li>• 1956: Jean Beliveau is the first hockey player to appear on the cover of "Sports Illustrated".</li> <li>• 1957: CBS is the first US television network to carry NHL games.</li> <li>• 1959: Willie O'Ree of the Boston Bruins is the first Black player in the NHL.</li> <li>• 1981: The Hockey Hall of Fame opens in Toronto.</li> </ul>	<ul style="list-style-type: none"> <li>• 1983: NHL introduces a five-minute sudden death overtime period at the end of tie games in the regular season.</li> </ul>	<ul style="list-style-type: none"> <li>• 1990: NHL tries to end its ailing image by implementing new rules aimed at reducing violent play and emphasizing a game based on skill and style.</li> <li>• 1996: NHL team owners agree to a \$600 million, 5-year TV contract with ABC and ESPN starting with the 2000-01 season.</li> <li>• 2003: Heritage Classic, an outdoor game between the Edmonton Oilers and the Montreal Canadiens in -1 degree weather that draws record crowds.</li> </ul>	<ul style="list-style-type: none"> <li>• 2004: NHL agrees to a two-year revenue-sharing deal to broadcast games on NBC, replacing former broadcasting partner ABC.</li> <li>• 2005: Rule changes are implemented to boost scoring, and emphasize a game based on speed and finesse.</li> </ul>
<b>SUMMARY</b>	<ul style="list-style-type: none"> <li>• Standard rules help hockey coalesce as a sport and make games in popular. Amateur and professional leagues expand but they are anarchic and short-lived.</li> </ul>	<ul style="list-style-type: none"> <li>• By acquiring or outlasting its competitors the NHL becomes the dominant pro-hockey league. Games broadcast on radio make their first appearance.</li> </ul>	<ul style="list-style-type: none"> <li>• The players and the NHL become more fan-friendly. Hockey makes a first appearance on television. The USSR enters the international hockey scene.</li> </ul>	<ul style="list-style-type: none"> <li>• The NHL consolidates its presence in the northern markets. It already dominates by adding more franchises. Playing against the Soviets is a major attraction.</li> </ul>	<ul style="list-style-type: none"> <li>• The NHL begins its expansion to southern and west coast markets. Wayne Gretzky invigorates the game. The NHL sends players to the Olympics. The NHL tries to clean up its violent image.</li> </ul>	<ul style="list-style-type: none"> <li>• Fans feel betrayed by the 2004 lockout. The future of the NHL is uncertain.</li> </ul>

# Era Analysis

## Key Insights

**1.** Low “backyard access” has restricted hockey’s popularity in many parts of the country. This is exasperated by league expansion which placed teams into divisions that did not capitalize on traditional regional rivalries.

**2.** Popular media perpetuates hockey’s violent image, with which the NHL has a love-hate relationship (rules have been implemented to reduce violence and attract new fans, but at the risk of alienating existing fans).

**3.** Low ratings leads to constantly shifting television contracts which further disrupts fan access.

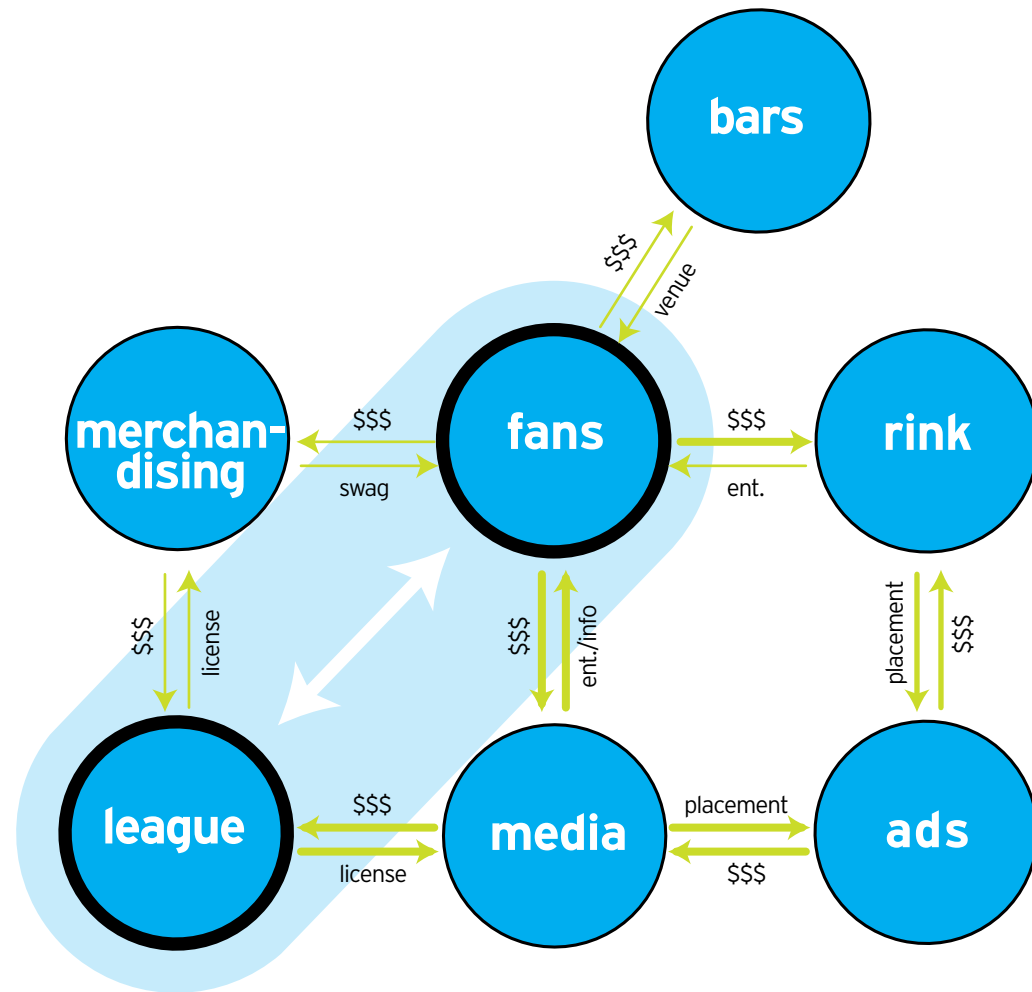
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# Value Web

## Key Insights

- 1. There is a disconnect between the league and fans.
- 2. Their interactions are mediated and indirect.
- 3. This decreases the opportunities the league has to directly influence fans and learn about their values and tastes, and thus provide offerings that resonate and connect with them.

We reviewed a value web to identify significant transactions.



# Position Map

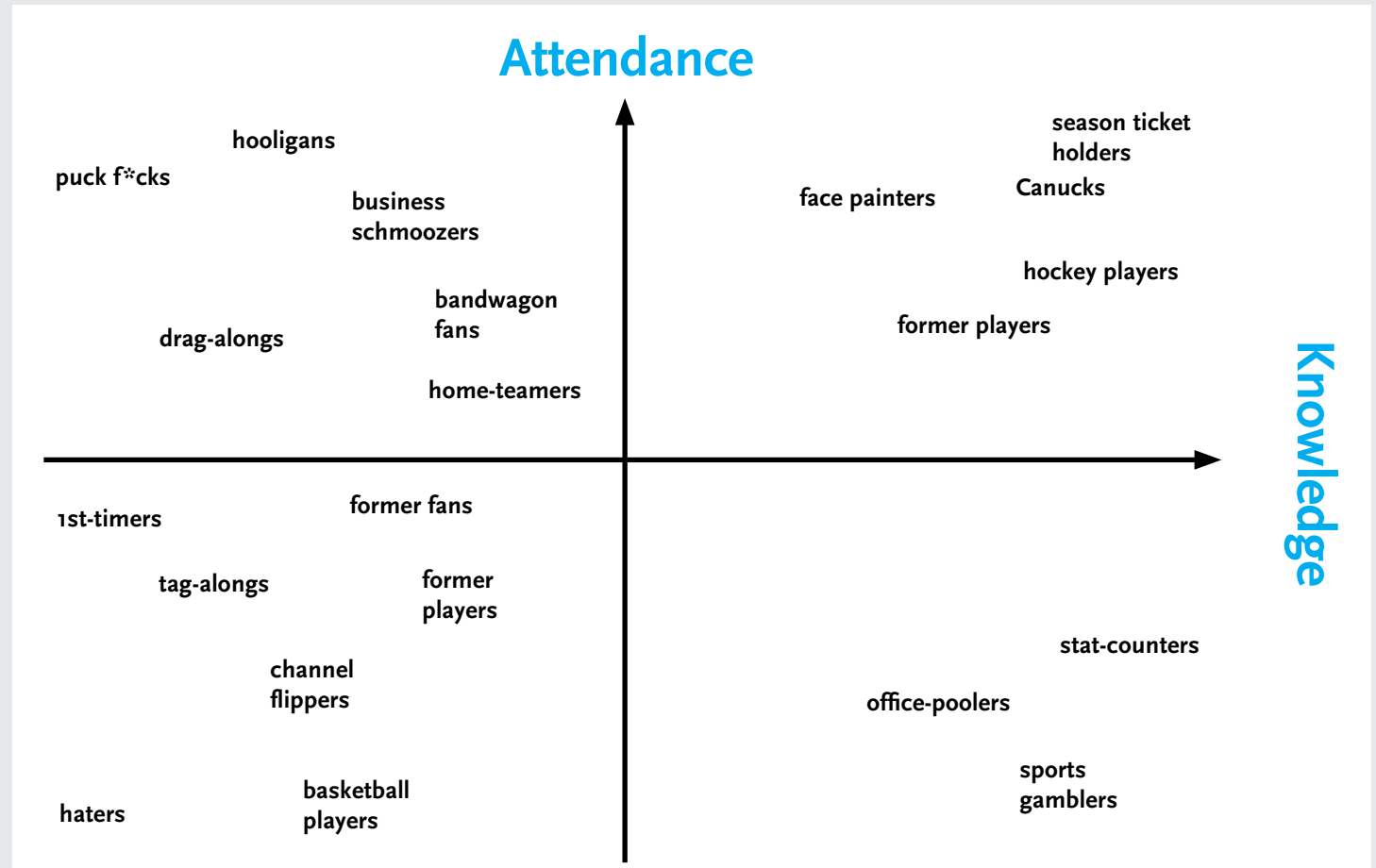
Fans positioned according to attendance and knowledge.

### Attendance:

Consuming games through purchasing tickets and/or viewing on television or through other media

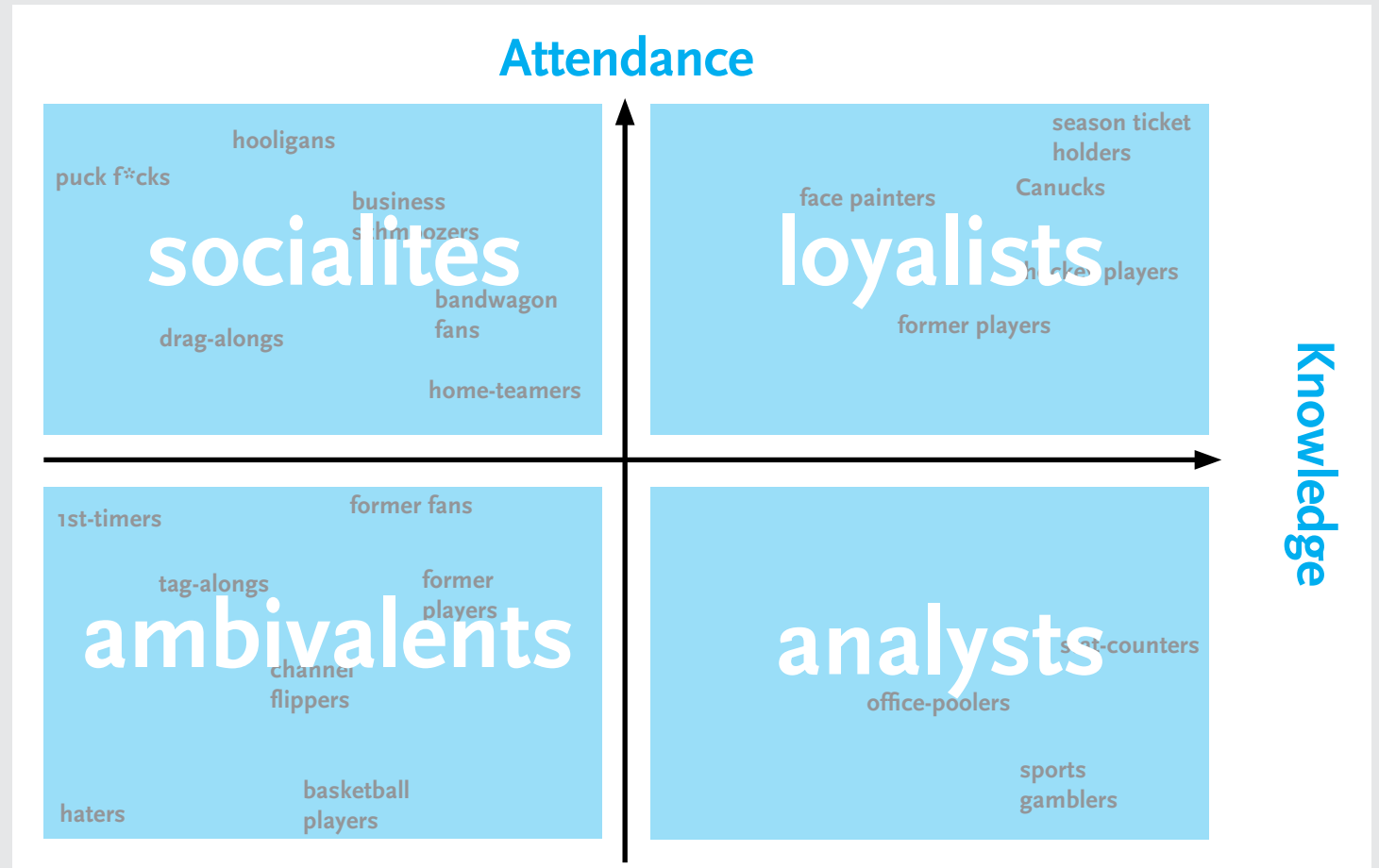
### Knowledge:

An understanding of the rules, traditions and current events of the game.



# Position Map

Fan types positioned according to attendance and knowledge.



# Fan Types

## Attributes of four fan types.

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### Ambivalents

- Some familiarity with hockey
- Catch it if it's on TV, at home or at a bar
- Tend to not watch the whole game from start to finish

### Socialites

- Drawn to excitement of big games
- The spectacle of the game is important
- Friends & family are fans
- Enjoy the shared participatory experience
- Perceive the game as a broad social event
- Tend to follow one team
- Alcohol: “yes, please”

### Analysts

- Stat-driven
- History buffs
- First to know new NHL happenings
- Social experience is not at all important
- Follow the sport through all available channels (TV, internet, magazines, newspapers)
- Follow every team closely
- Gamblers
- Alcohol: “no, thank you”

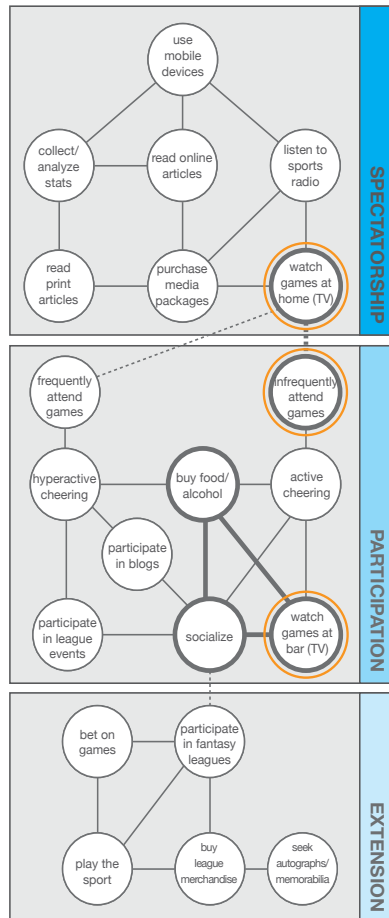
### Loyalists

- Every game is important
- Play trumps spectacle
- Friends & family are not necessarily fans
- Sharing the experience of the game with others has less importance
- Perceive the social experience of the game narrowly
- Tend to follow one team & the league
- Alcohol: “well, sometimes”

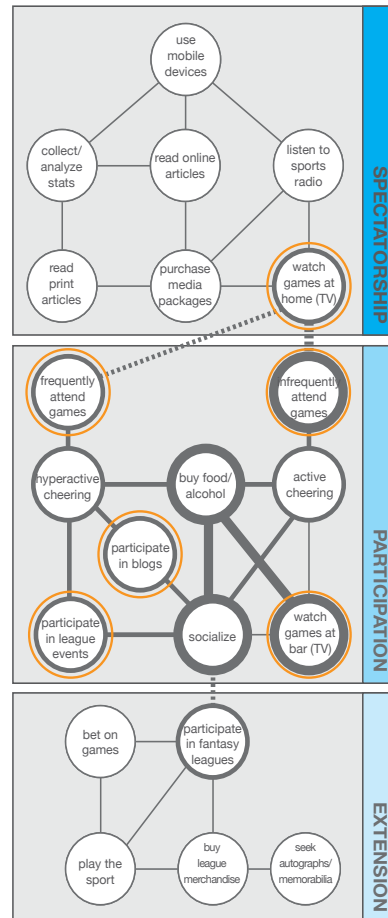


# Activities Relationships

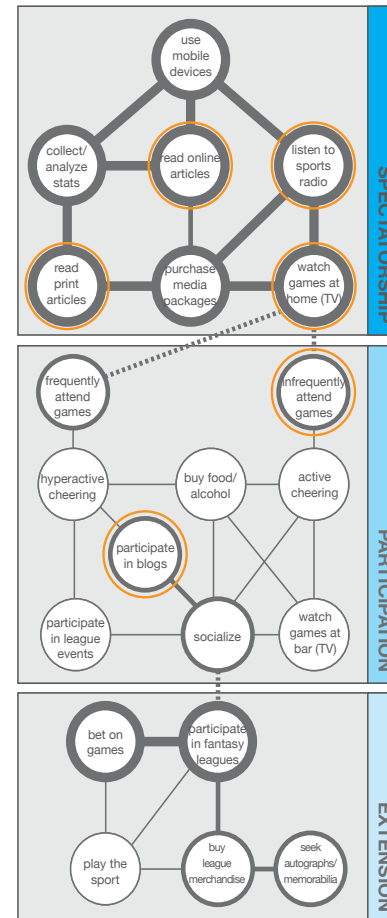
## Ambivalents



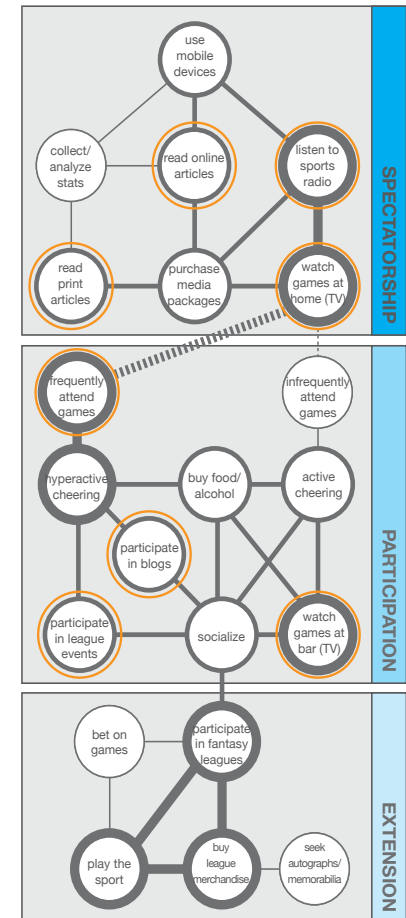
## Socialites



## Analysts



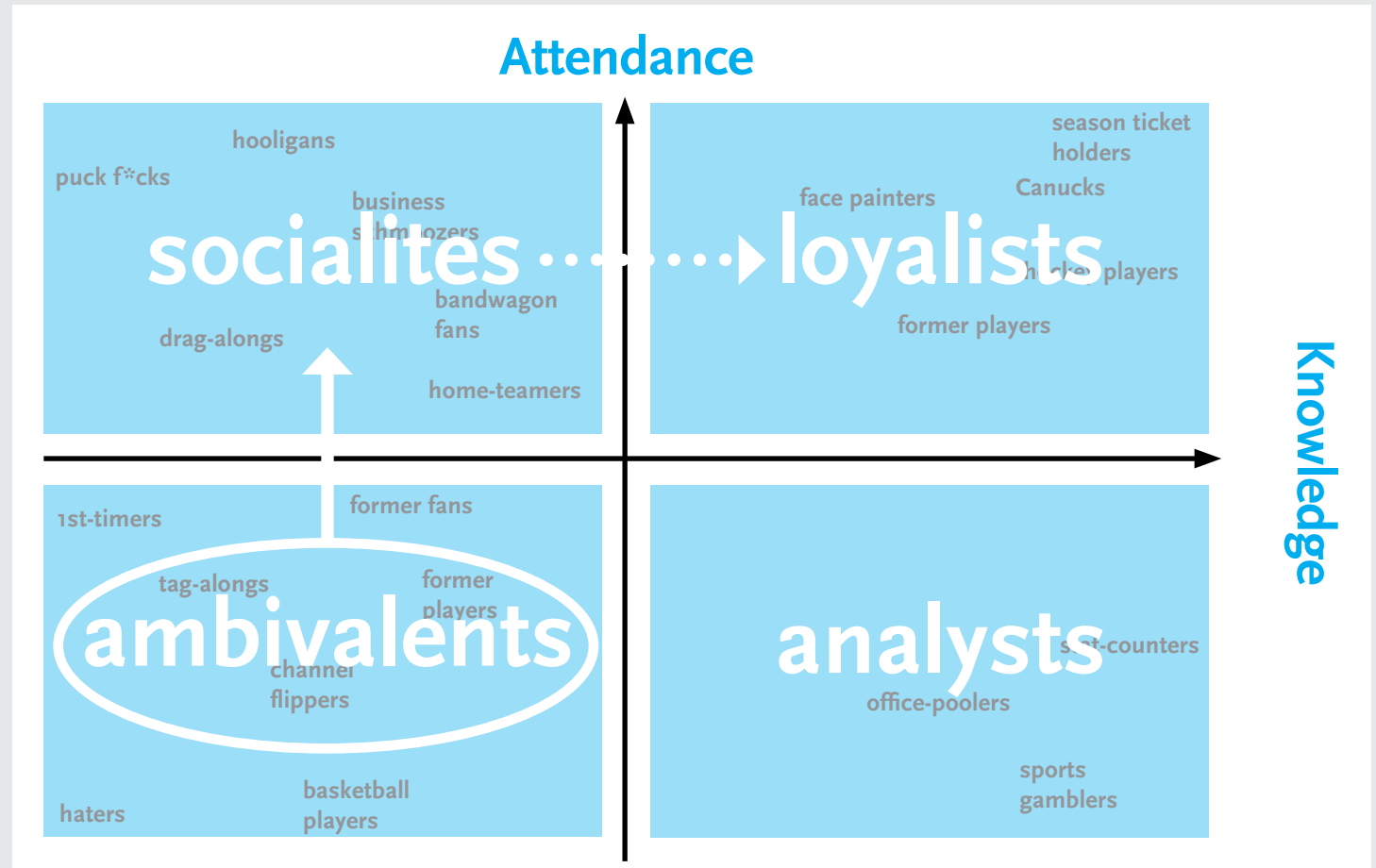
## Loyalists



# Position Map

Opportunity to convert fan types and drive higher attendance.

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## Opportunity Areas

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- 1. Indoctrinate fans as early as possible in their lives**
- 2. Highlight the positive elements of hockey's exclusivity and dispel cultural misconceptions.**
  - Foster appreciation for the speed and difficulty of the game
  - Increase opportunities for fans to relate to the strategic elements of the game during broadcasts

# Appendix

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# Barriers

## Barriers to playing popular sports.

### Cost

- Purchase access to area of play (field, rink, court)
- Time spent traveling to area of play
- Purchase equipment

### Culture

- Popularity of sport (country/region/city)
- Ubiquity of sport

### Availability

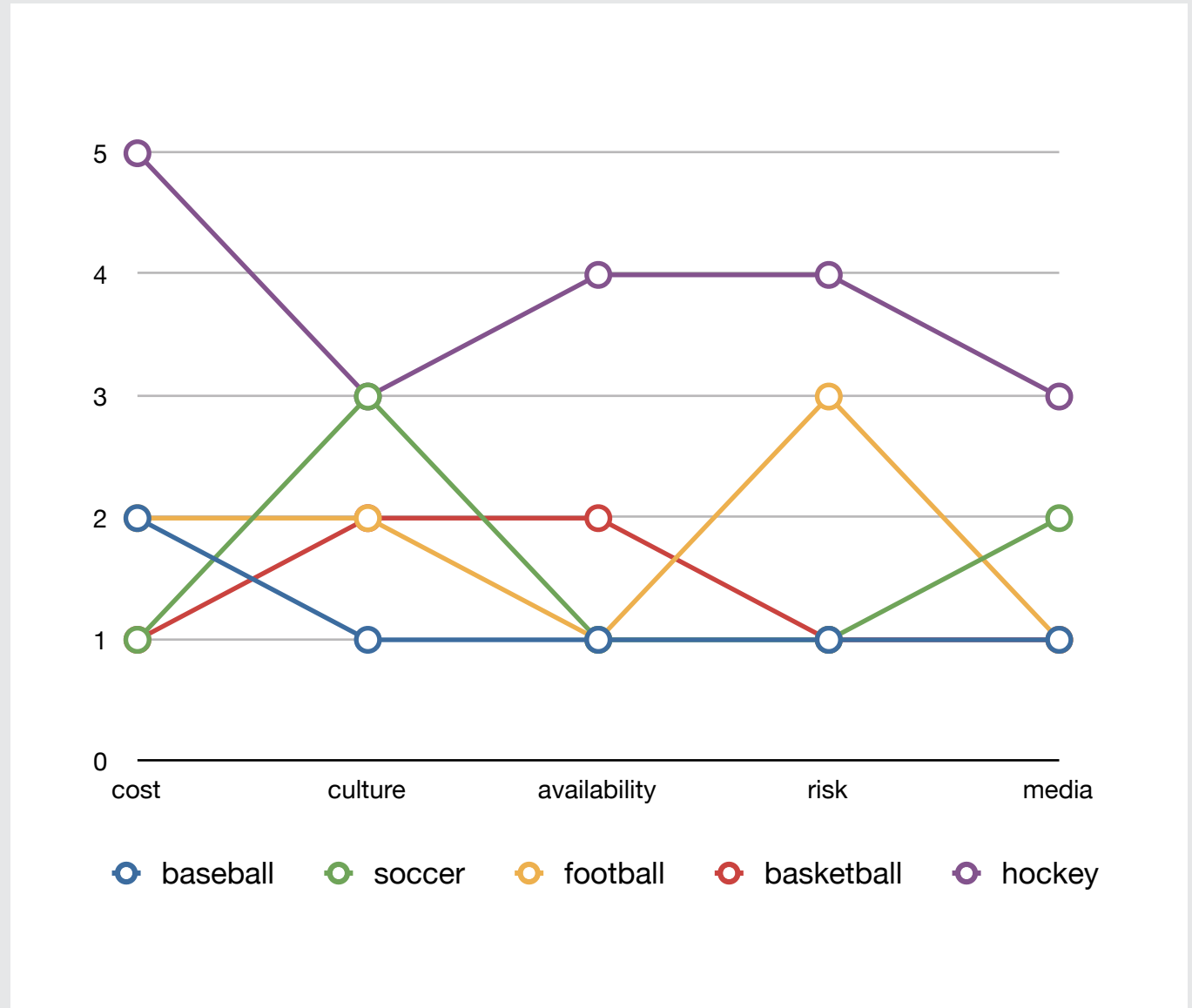
- Potential to play impromptu games
- Youth leagues
- High school/college teams
- Recreational teams/clubs

### Risk

- Potential for bodily harm while playing

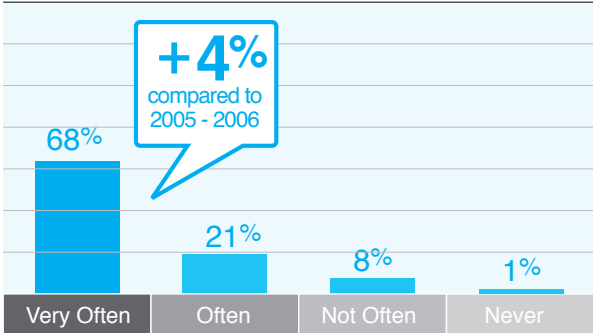
### Media

- Access to televised games
- Presence in popular media (newspapers/magazines/radio/internet)

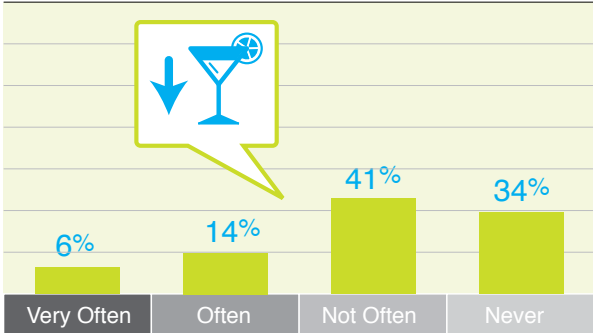


# Viewing Patterns

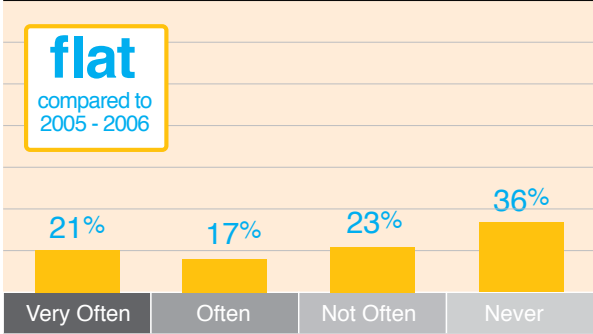
## Watch NHL hockey at home



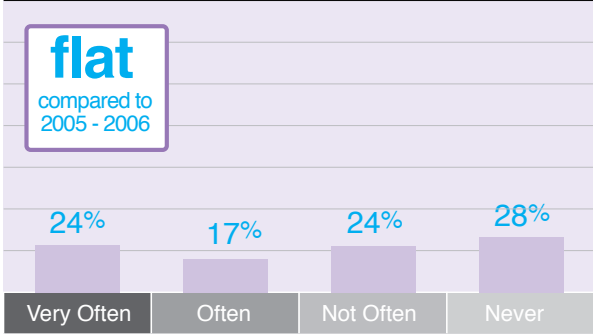
## Go to restaurant/pub to watch



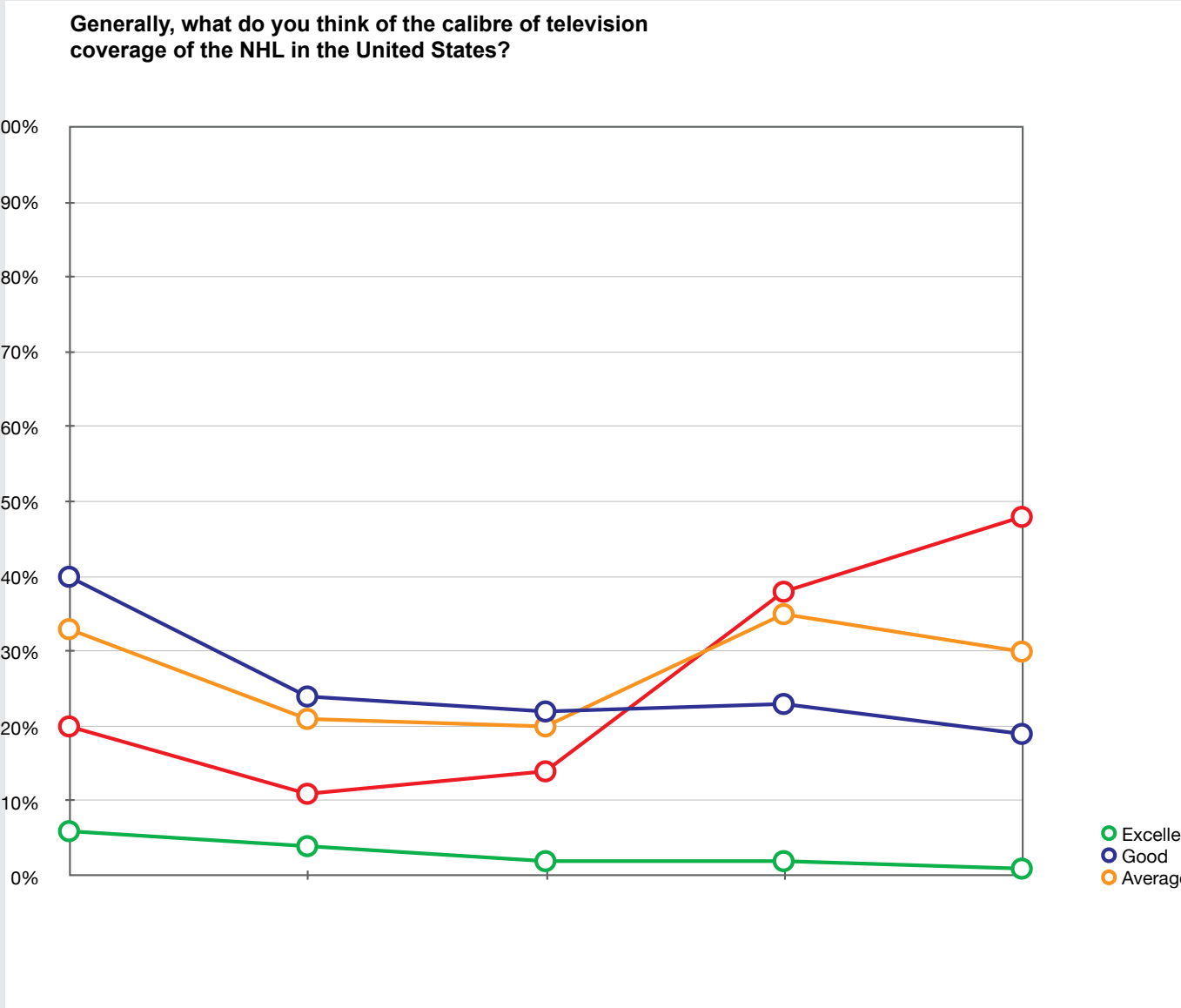
## Go to one NHL hockey game



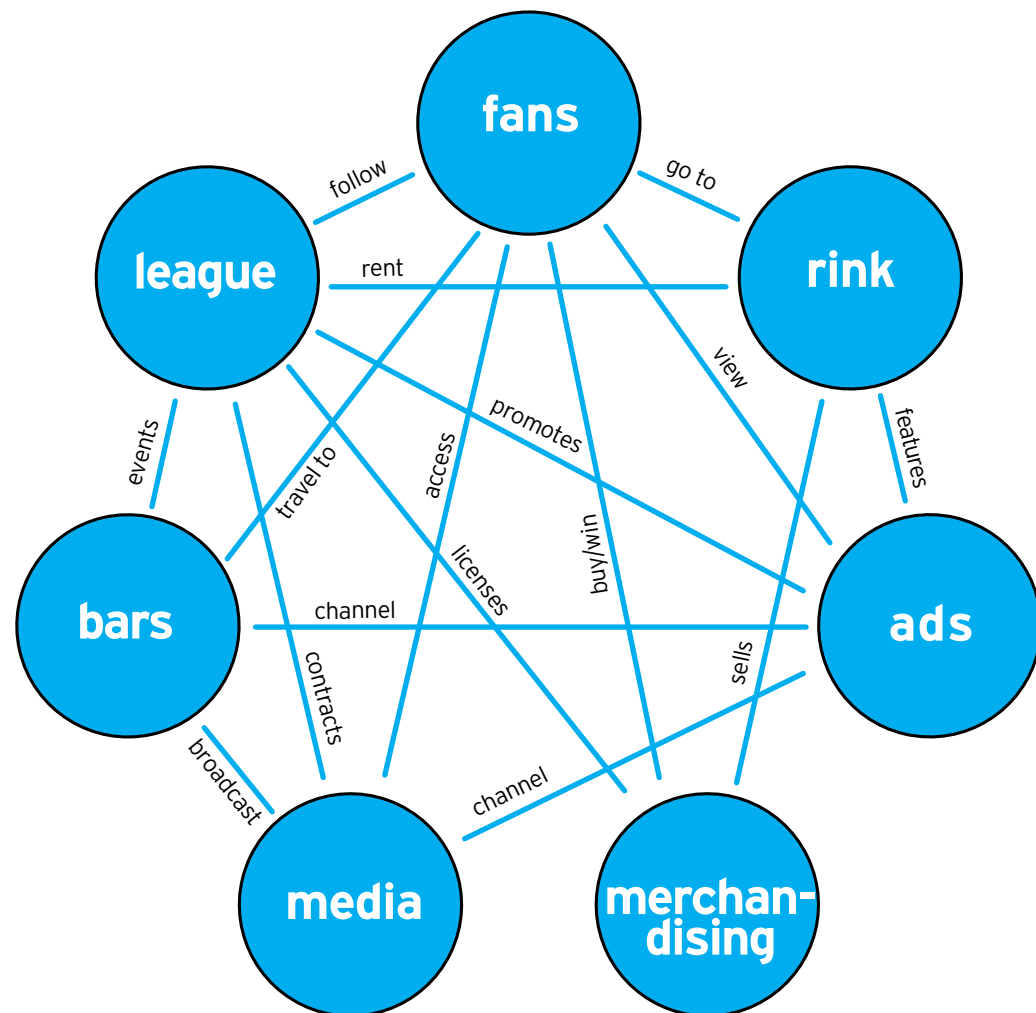
## Go to more than one NHL game



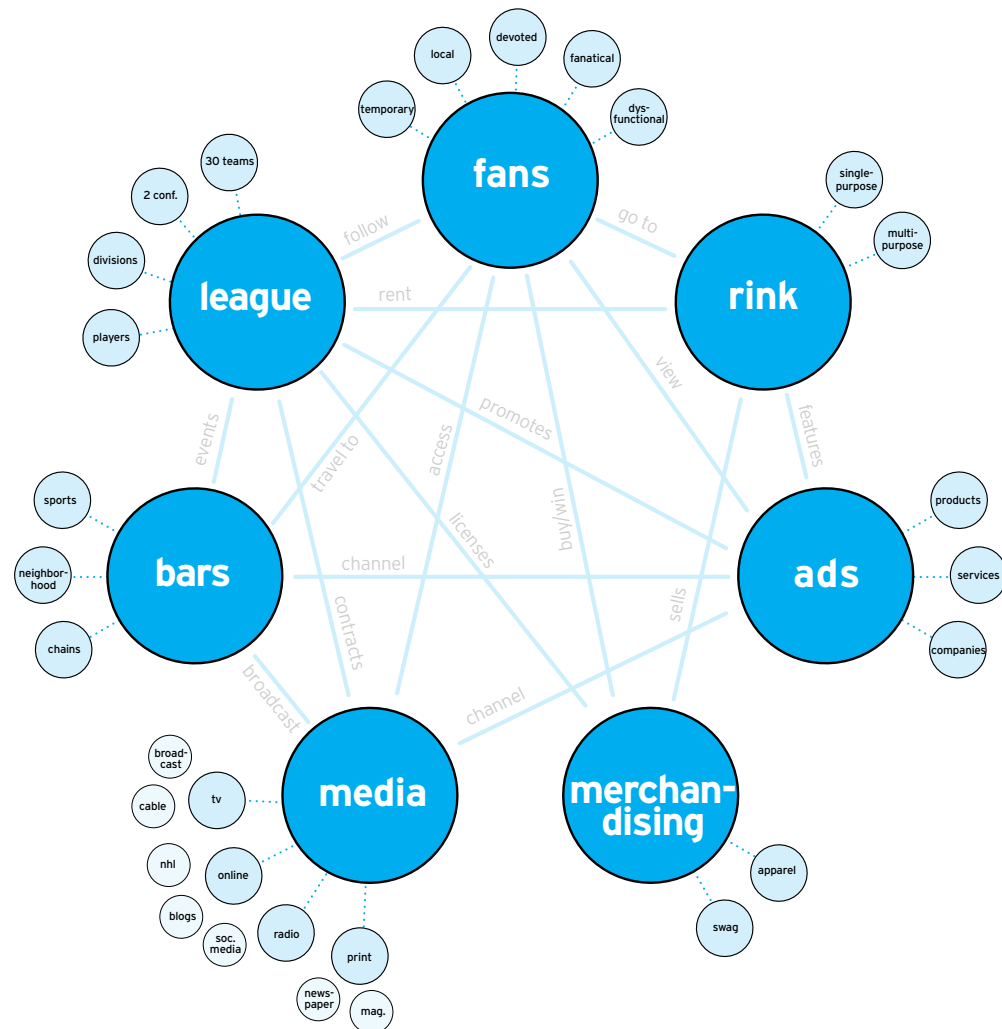
# Viewing Patterns



To evaluate the relationships of the league to its fans through media & advertising channels we prepared an entities, relationships, attributes and flow (ERAF) analysis.



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# Compelling User Experience

## Observations

### Attraction

**Triggers:** Advertising tactics, promotions, events, and artefacts are used to trigger interest and raise awareness in fans.

**Loyalty:** Local sports news, national media/press coverage attract fans and reinforce connections to a team.

#### Attraction

*Elements designed to attract NHL fans are typically leveraged throughout their home cities. These include:*

- National broadcasts (typically driven by team standings; playoff positions = more national tv time)
- Advertising from all media (newspaper, magazine, television, radio, internet, billboards)
- Licensing deals for products, especially beer (i.e., Budweiser)
- Promotion (sponsored events, vehicles, tents)
- Venue/rink advertising
- Bumper stickers/decals on vehicles
- License plates

*Local broadcasts and fans also contribute to attraction:*

- Local sports shows and news
- Manager and player interviews
- Editorials on teams, players, managers
- Local/office conversation "...did you see that game last night!"

#### Engagement

*Navigation*

Inside the venue fan density is at maximum and contributes to the intensity of the experience. Human traffic is high as everyone negotiates the space to use rest rooms and many purchase food/drinks or buy merchandise. Locating seats is typically a challenging part of the experience for those not familiar with venue's signage and layout. Distinguishing between levels and sections can be difficult, especially when a fan doesn't know their current location in the stadium. An added challenge is keeping groups or children together while navigating the crowd. Even more, doing this while carrying a tray of drinks and nachos, your coat, and an oversized foam finger.

*Stimulation*

In the seating area the sensory stimulation is at its height. Music and/or sound effects play throughout the game accentuating many of the nuances of play. Lights are often orchestrated to the game as well. Additionally, rink announcers will identify players and other aspects of the game. A key aspect of hockey is the glass enclosure, meant to keep the puck from injuring fans, but also conveniently provides a material players will often crash into while checking that sends a distinct sound through the stadium. The sound of skates on ice, sticks and pucks are also a big part of the sounds heard at a game.

Visually, the rink is often an overload of advertising with nearly every possible surface adorned with a logo or advertising message. Other visual elements feature digital displays that update frequently with game stats. Others displays are capable of replaying live action in slow motion – standard practice for the most entertaining elements of the game. The fan response can often be as high, if not higher, when view replayed action.

*Participation*

A full stadium of enthusiastic fans creates one of the most engaging experiences. The collective cheers and jeers run the full spectrum of emotions and adds significantly to the participatory connections of fans. In particular, the positive momentum of a team through a sequence of play often creates the heightened levels of fan participation. For example, a steal, or a well-blocked shot, or a score will cause this. Also, to the disappointment of some and the thrill of others, checking and the more physical aspects of hockey also excite fans.

Additional elements of engagement during games include giveaways, such as t-shirts sling-shot into the crowd from the ice. Many stadiums will also focus on fans and display their image on the big screens. Breaks between periods can also include skill games on the ice by randomly chosen fans. Mascots, also part of the experience, will regularly make their way through the stands and interact with fans.

#### Extension

*Artefacts and Stories*

Memorabilia from a given game or any element branded with the team's logo helps extend the experience. Many fans seek autographs others keep ticket stubs. Fans also photograph elements of the games they attend and friends and family while at the game.

Some fans will add team branded watches or credit cards to their collection. Other items include calendars, professionally shot pictures of games/teams, mugs, and hockey pucks. Collectibles are also common and become more desirable for some fans if their team does well, i.e., does well in playoffs or becomes a Stanley cup contender.

Another common behavior is for fans to recount their game experience or aspects of the game, a particular play for example, with friends and colleagues -- water cooler talk.

#### Entry

*Preparation and Transportation*

The experience begins for most in preparing to go to the game. Many fans prep for a game by wearing team colors, jerseys or more. Traveling to the game is also part of the experience whether via public transportation or by car as a fan nears the stadium, the density of other fans increase on the streets and parking lots and creates camaraderie.

#### Exit

Much like the entry phase but in reverse, fans negotiate the crowds, the lines for restrooms and the exits to find their way back to their cars or to public transportation. Many times, good games, or wins for the home team will motivate fans to purchase memorabilia while exiting.

# Compelling User Experience

## Observations

### Engagement

**Navigation:** Making your way among thousands of fans, navigating to your seats, using the facilities, and buying food/drink and/or merchandise can be challenging to some and part of the experience to others.

**Stimulation:** Visual and auditory stimulation is heightened creating a highly immersive experience.

**Participation:** Crowd cheers/jeers, particularly during impressive play motivate fan participation. Close and highly competitive games contribute to the drama and can fuel fan participation.

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# Compelling User Experience

## Observations

### Extension

Artifacts: Tokens, memorabilia, clothing, programs, etc. are often saved or collected by fans to capture the event for themselves.

### Stories/memories:

Water cooler talk or team comparisons among fan rivalries often extends the experience.

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## Definition of terms

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**DEFINED**

**FRESH**

**IMMERSIVE**

**ACCESSIBLE**

**SIGNIFICANT**

**TRANSFORMATIVE**

**Defined:** The game itself to a regular fan is understood but only relevant during a game

**Fresh:** Aspects of the game, the players and amazing plays are fresh, most everything else is not surprising

**Immersive:** Entry, engagement, and exit are highly immersive, but little else is.

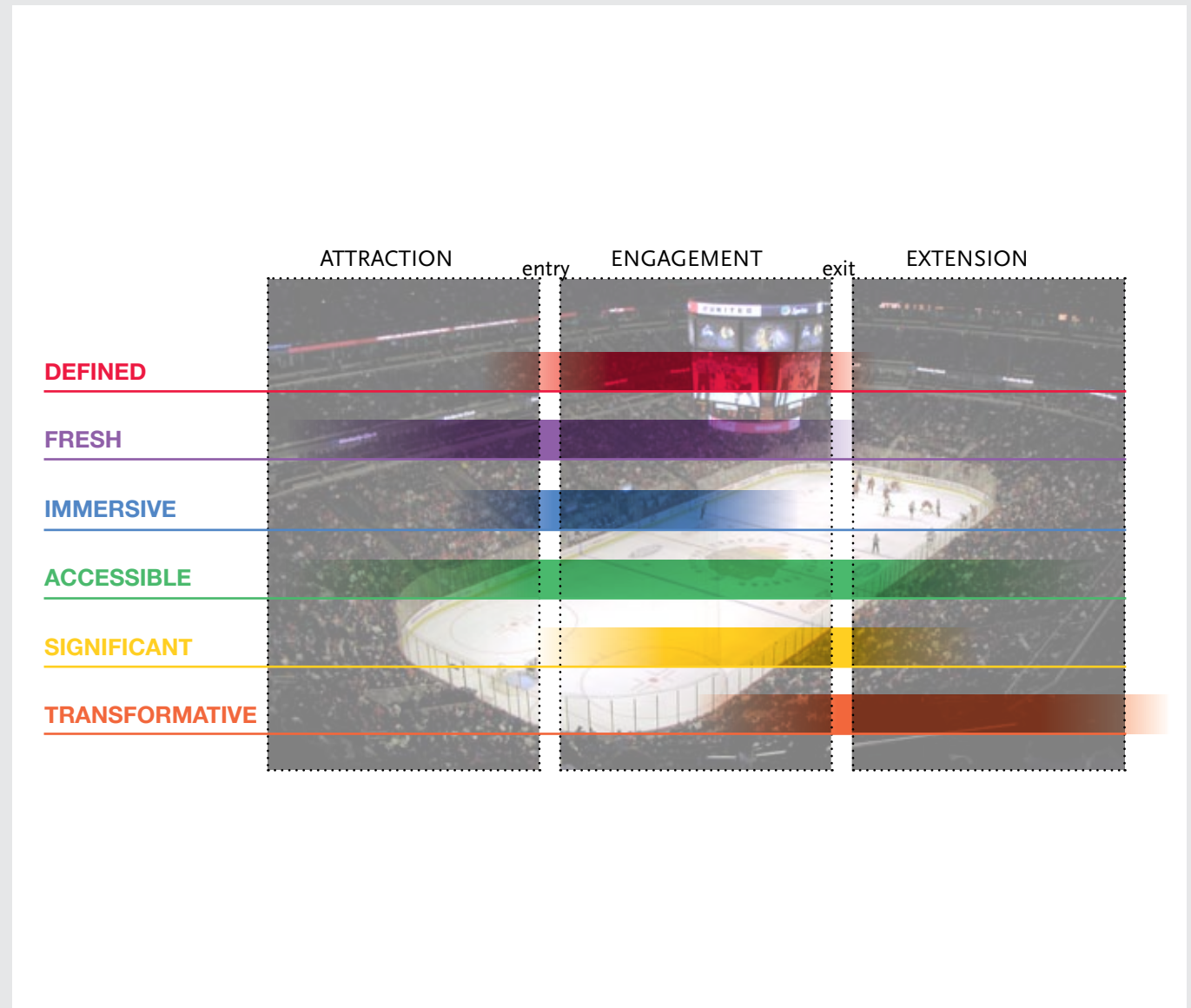
**Accessible:** For many, first-hand experience of the game is not available. It's expensive and requires basic skating skills to play competently. Rink/ice availability and physical stamina are also barriers. Hockey players, like most pro athletes, are celebrities and often buffered from the fans.

**Significance:** The games themselves can contribute to team and/or player loyalty. Artifacts and stories or memories of games with friends and family can carry the significance of the experience beyond the event itself.

**Transformative:** A satisfying game experience can enhance loyalty and perhaps motivate a marginal fan to become more loyal.

# Compelling Experience

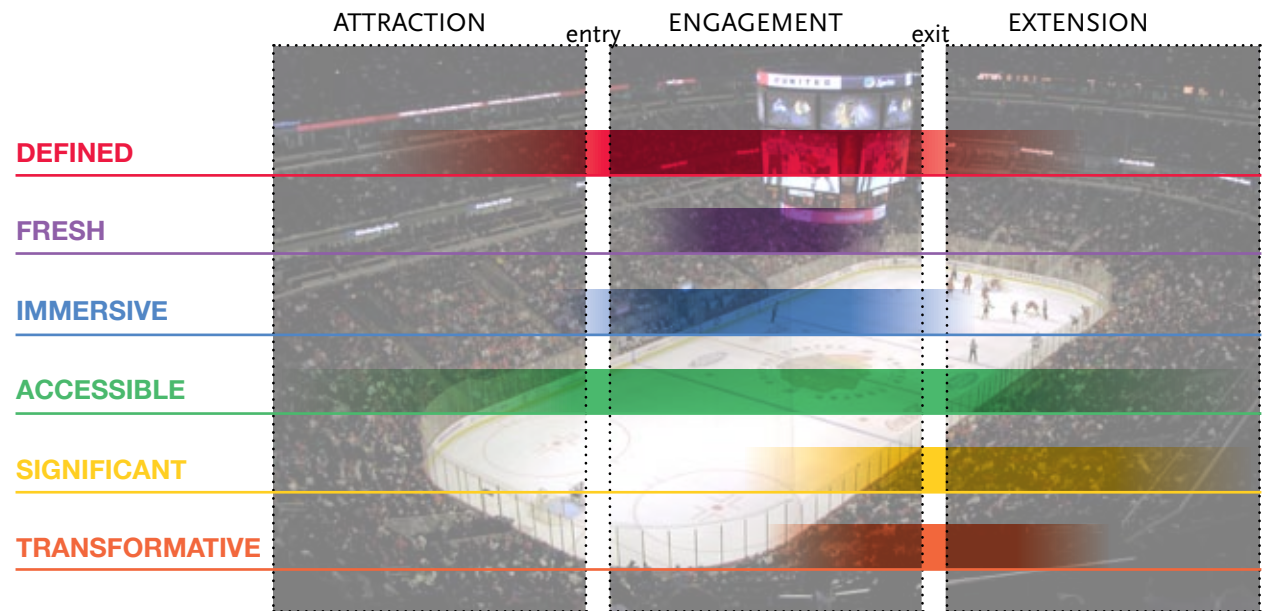
## Perspective of an Ambivalent hockey game attendee



# Compelling Experience

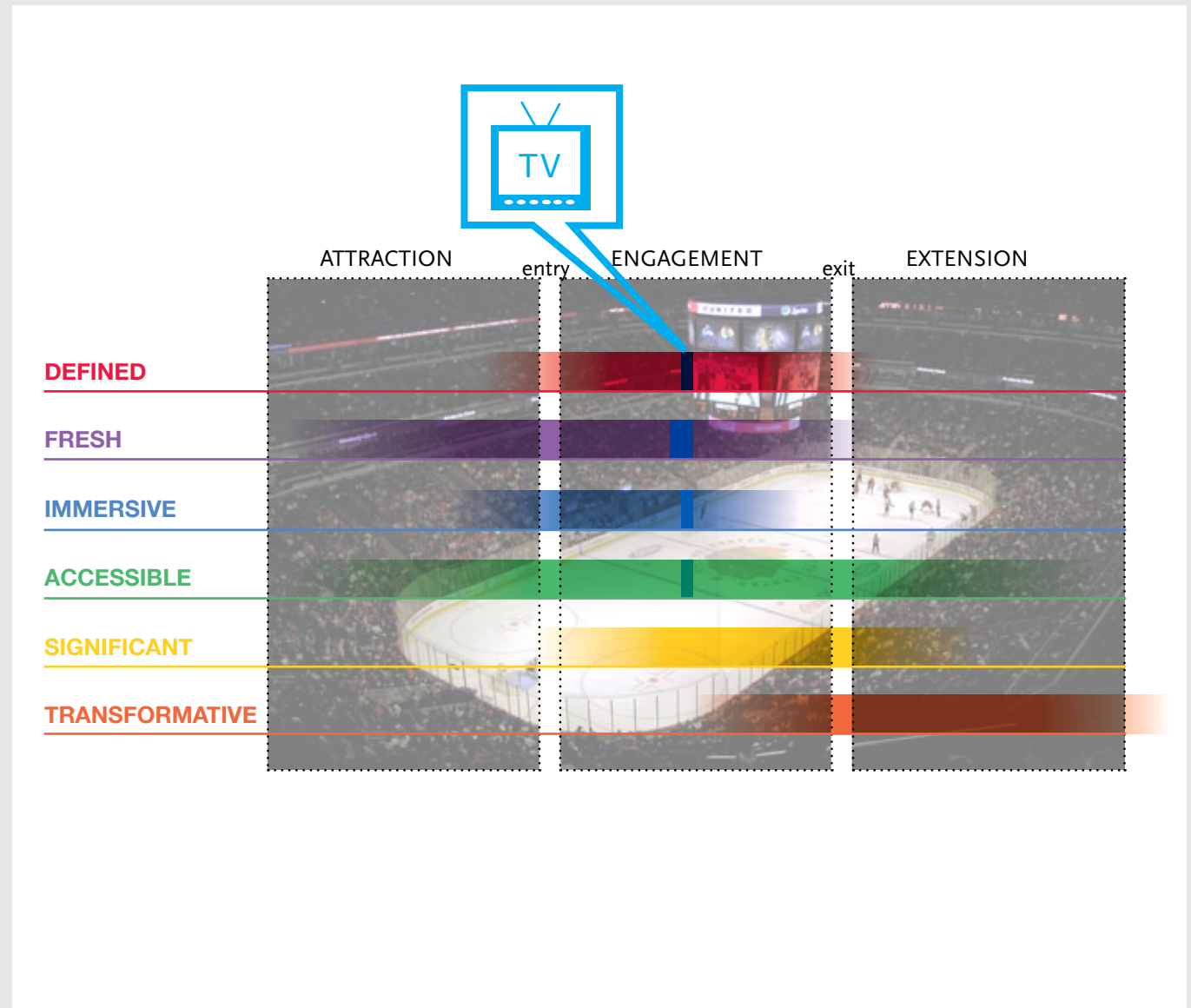
## Perspective of a Loyalist fan

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# Compelling Experience

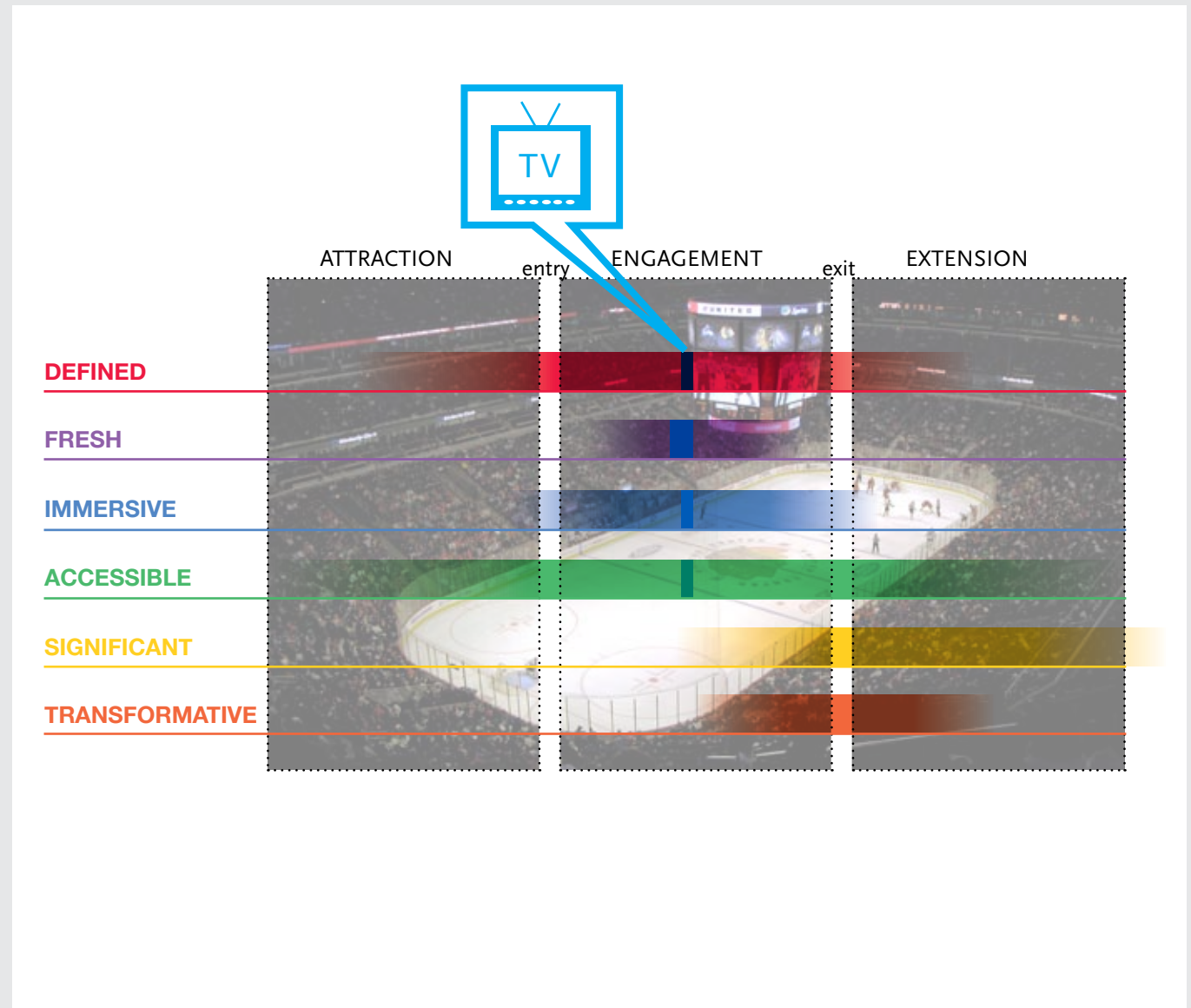
## Perspective of a *Ambivalent* hockey game attendee



# Compelling Experience

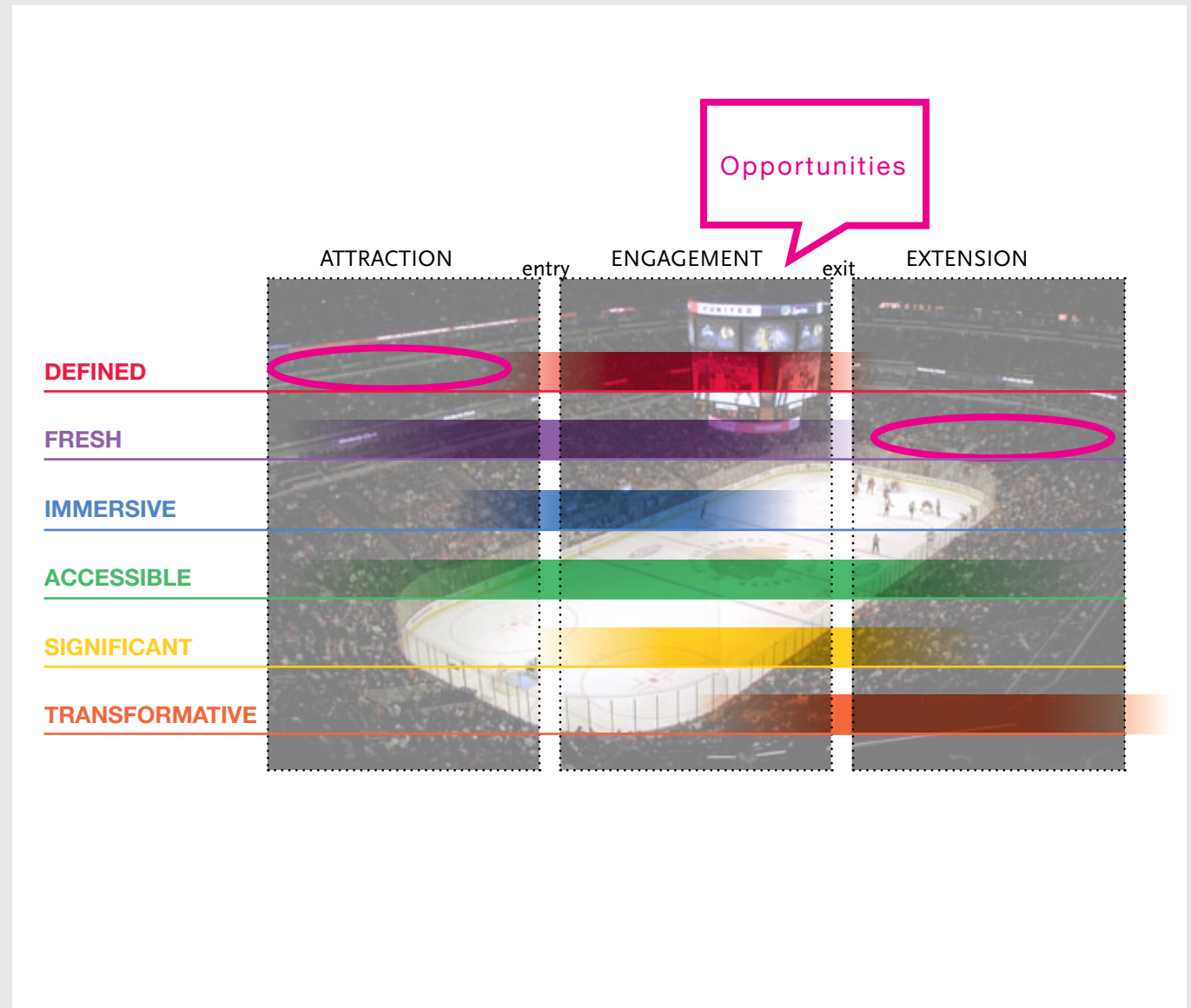
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# Compelling Experience

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# Compelling Experience

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