



Hockey in Canada – 2012 Public Opinion Survey

Final Report

Background

Hockey has long held a central place in Canada, and the National Hockey League is the flagship arena for the sport. Professional hockey has long stood out for the aggressive style of play (deliberate hits, fighting), which has largely been accepted as just a part of the game. But over the past year, what seems like an unprecedented spate of high profile injuries to key stars such as Sidney Crosby (together with growing recognition of the frequency and dangers of concussions at all levels and across sports) has generated new concerns about the current style of play and the damage it may be causing to both players and the popularity of the game.

What does the Canadian public think about what is happening in professional hockey today? To address this question The Environics Institute conducted a national public opinion survey, in collaboration with *The Globe and Mail*, to explore current public attitudes about hockey in Canada, including interest in the game, concerns about violence and fighting, and support for new measures aimed at increasing player safety. The survey also updates opinions from a similar survey conducted by the Environics Research Group in 2010.

This survey was conducted online with a representative sample of 1,001 Canadians (aged 18 years and older), between May 2 and 7, 2012. The sample was balanced by key demographic and geographic characteristics to mirror the population-at-large. The 2010 survey was also conducted online, in January 2010. Further details about the survey methodology are provided at the back of this report.

Conclusions

Hockey continues to be as popular as ever, and Canadians' love for the game has not diminished as a result of this year's rash of injuries. The NHL's audience is holding steady (with one in four Canadians claiming to love hockey, and another four in ten also watching), and there is a growing consensus that hockey is an important part of the national identity.

The game's sustained appeal notwithstanding, there are widespread public concerns about its violent aspects. A majority of Canadians (including a minority of core fans) express discomfort with the violence, fighting and big hits that characterize the NHL style of play, although this sentiment hasn't strengthened noticeably in response to the current injury-plagued season.

Opinions about the aggressive style of NHL hockey are sharply divided between core fans and everyone else, but there is widespread agreement in both camps for changing the game to make it safer for players, including a ban on all shots to the head (including accidental hits). Such consensus, however, does not extend to the elimination of fighting, perhaps because it is not as clearly linked to injuries and player safety.

The research reveals that Canadians still love their hockey, but at the same time are now looking to the NHL to do what is necessary to keep players on the ice and out of the hospital.

Research Findings

CANADIANS' INTEREST IN HOCKEY

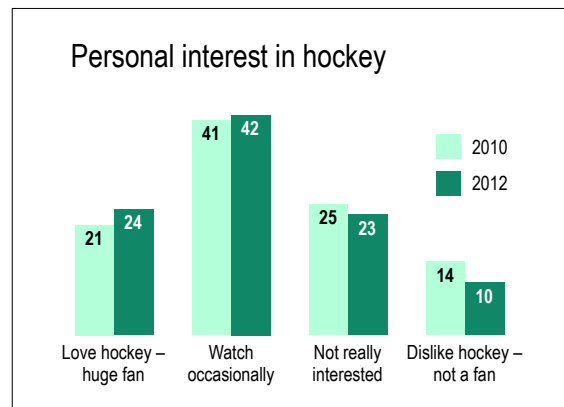
Hockey remains popular with most Canadians, with a solid fan base spanning the population but most notably among anglophone men aged 30- 49. Almost everyone now agrees hockey is an important part of the Canadian identity, and this view has strengthened since 2010..

Hockey has long been the most popular team sport in Canada, and this survey confirms it is as popular as ever, and even more than before is seen as an important part of the country's identity.

Hockey fan base. Two-thirds of the adult population follow the game, with one-quarter (24%) saying they love hockey and consider themselves to be “huge fans”, and another four in ten (42%) who “watch occasionally.” One quarter (23%) say they are not really interested, while one in ten (10%) actively dislike the sport.

Change since 2010. Recent controversies surrounding NHL hockey (e.g., concussions knocking key stars out of the game, disappointing performance of some Canadian teams) does not appear to be diluting the public's interest in the game.

The proportion of huge fans segment has increased marginally since 2010 (up 3 percentage points), while the number who actively dislike the game declined proportionately (down 4).¹



Who are most likely to be huge fans of the game?

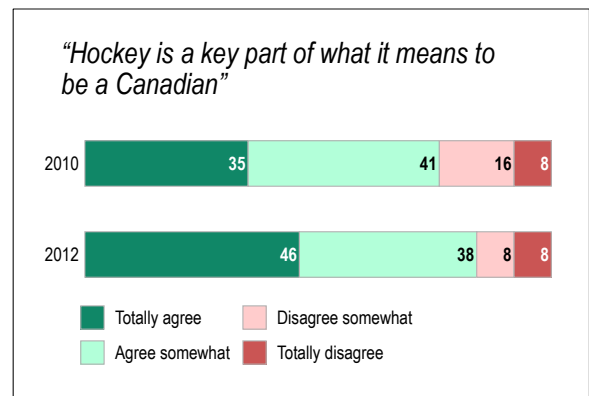
- Men (33%) are twice as likely as women (16%) to say they love hockey; women are twice as likely to say they dislike the game (14%, to 7%). However, this gap has narrowed slightly since 2010, as fan interest has increased a bit more noticeably among women.
- Canadians aged 30 – 49 (31%) make up the largest age cohort, compared with those under 30 (15%) and over 50 (23%). Over the past two years, fan interest has increased most noticeably in the 30-49 cohort (up 8), and less so among those over 50 (up 4), while declining among those under 30 (down 6).
- Across the country, the fan base is largest in BC (33%) and lowest in Quebec (18%; 15% in Montreal), where the decline since 2010 is most noticeable (due perhaps to the Canadiens' disappointing 2011-12 season). Since 2010, hockey's fan base has increased most noticeably in Atlantic Canada and western Canada.
- Anglophones (27%) are now more likely than francophones (21%) to be huge fans, with these two positions effectively reversing since 2010. Allophones (16%) are least likely to love hockey, but this group has also increased in size over the past two years, at the same rate as anglophones.

¹ This trend may be in part due to the timing of the two surveys: The 2012 survey was conducted during the NHL playoffs, while the 2010 survey was conducted during the middle of the regular season]

Hockey as part of Canadian identity. Hockey is much more than just a sport for most Canadians, and its role as a national symbol appears to be strengthening. A strong majority totally (46%) or somewhat (38%) agree that *“Hockey is a key part of what it means to be Canadian”*, and this sentiment has strengthened noticeably since 2010 (with the proportion in total agreement up 11 percentage points).²

Predictably, fan status is the strongest predictor of attitudes about hockey as important to national identity: 73% of huge fans totally agree about the importance of the game, compared with 50% of occasional fans, 25% among those not interested, and only 14% among the 10 percent who actively dislike hockey.

Growing belief in hockey as a national symbol is evident across the population; this view has strengthened the most among huge fans (total agreement up 14 points), but is also now more widely expressed by those not interested and who dislike hockey.



Total agreement about hockey as part of the country’s identity is now most widespread in Atlantic Canada (52%) and Quebec (52%), among those without a high school diploma (51%), and is lowest in BC (38%), Toronto (34%) and allophones (35). There is no difference by gender or age cohort.

These findings are consistent with Environics’ Focus Canada surveys that chart a rising importance placed on hockey as a symbol of Canadian identity between 1997 and 2010. Hockey remains in the lower tier among 13 symbols, but has strengthened its position relative to such icons as bilingualism and the CBC.

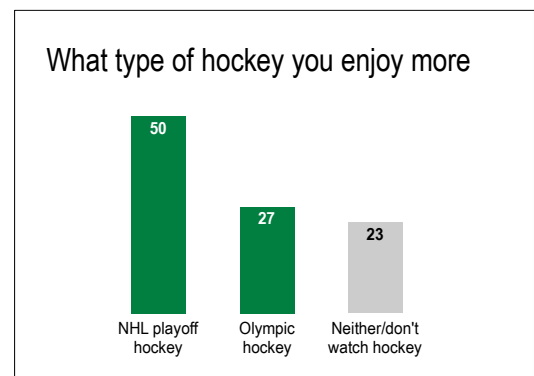
Hockey as a good activity for kids. Canadians also continue to be very positive about hockey as a participatory as well as a spectator sport. Almost nine in ten agree totally (44%) or somewhat (44%) that *“hockey is a good activity for kids”*, down marginally since 2010. While huge fans are among those most likely to endorse the positive benefits of hockey for the country’s youth, they are also notably less likely than before to hold this view (with total agreement down 13 points).

Total agreement about hockey as good for kids is most evident in Atlantic Canada (59%) and the Prairies (56%), while least so in Quebec 36%) and BC (36%) (where there have been declines since 2010), as well as among allophones (28%). Views are similar by gender, age and education.

NHL versus Olympic hockey. What do Canadians generally prefer watching? NHL playoff hockey (50%) outranks Olympic hockey (27%) by a two-to-one margin (the remaining 23% do not watch either).

Predictably, interest in NHL hockey is stronger among men (57% versus 44% of women), but more surprisingly also among Quebecers (59%), in comparison with residents of Atlantic Canada (47%) and Ontario (44%).

Preference for NHL playoff over Olympic hockey is also more evident among Canadians with out a high school diploma (58% vs. 17% who prefer Olympic hockey), in comparison with those with a university degree (42% vs. 34%).



² The 2010 survey was conducted just before Canada’s dramatic gold medal victory in the 2010 Vancouver Winter Olympics

Importance of Canadian team success. Much is often made of the importance of Canadian teams doing well in the playoffs, and one of them winning the Stanley Cup (last achieved in 1993). Seven in ten Canadians totally (28%) or somewhat (40%) agree that *“it matters a great deal to me that a Canadian team wins the Stanley Cup.”*

Opinions are notably similar across the population (including residents in Toronto, Montreal and Vancouver), and are marginally stronger among women (31% totally agree) than men (26%). Notably, huge fans (40%) and those preferring NHL playoffs to Olympic hockey (36%) are not much more likely than occasional watchers (32%) to place strong importance on the success of Canadian teams.

CONCERNS ABOUT VIOLENCE AND FIGHTING

Opinions are divided when it comes to the aggressive aspects of NHL hockey. A majority of Canadians do not like the violence, big hits or fighting, although recent controversies have not strengthened this view. Predictably, these aspects of the game are much more popular among the NHL’s core audience.

Hockey’s continued popularity notwithstanding, many Canadians are not comfortable with the violence that typifies the NHL, and which has been prominent during this past season and early into the playoffs.

Focus of the 2012 NHL playoffs. Canadians were asked to name what one thing stands out most for them in this year’s NHL playoffs to date (respondents were provided a list of six responses, plus space to write in something else). Most of the responses fell equally into two themes, one positive and one negative.

What stands out most in this year’s NHL playoffs?

Huge fans and occasional watchers

	HUGE FAN	OCCASIONAL WATCHER
Aggressive play/injuries/suspensions	31	37
Competitive/exciting games/upsets	54	37
Play of Canadian teams	10	13
Other	3	–
Nothing	3	13

- 30% focused on the competitive and exciting play during the early playoff rounds (13% exciting games, 12% competitive series, 5% upsets)
- 31% were most struck with the aggressive tone of this year’s playoffs (22% aggressive play and fighting, 6% injuries, 2% suspensions).

The remainder noted the play of Canadian teams (9%) or other aspects (each noted by less than 1%). Three in ten (29%) were not following the playoffs at all or enough to offer a response.

Predictably, strong hockey fans are the most likely to emphasize the competitive and exciting play (54%), although a significant minority (31%) focused more on the aggressive play. Occasional fans gave equal weight to both aspects, while most of the remainder were not following enough to offer a response.

Discomfort with violence in hockey. A clear majority of Canadians totally (32%) or somewhat (30%) agree with the statement “*I am uncomfortable with the violence in hockey*”, compared with just under four in ten who somewhat (22%) or totally (16%) disagree.

Opinions have changed marginally since 2010, with modest strengthening in agreement with the statement (4 point shift from “somewhat” to “totally” agree).

Views are similar across the population, but personal discomfort about violence in hockey is more evident among women, Canadians 50 plus, residents of Quebec and Alberta, and university graduates, and least so among those under 30. Over the past two years, concern about hockey violence has grown most noticeably among those under 50 and Albertans.

The most significant predictor of discomfort with hockey violence (and related issues) is personal interest in the game. Fewer than one in five (18%) hockey fans totally agree with the statement, rising to 32% among occasional fans, and peaking at half (49%) among those who dislike the game. The strengthening view about violence in hockey is most significant among occasional watchers (up 12 points), but is also evident among huge fans (up 5) as well as non-fans (up 5).

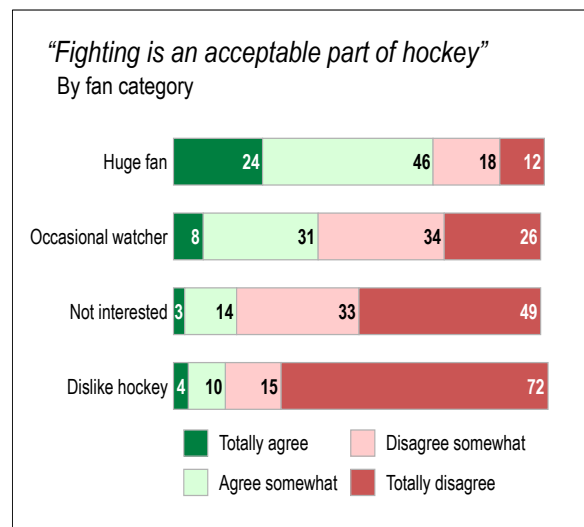
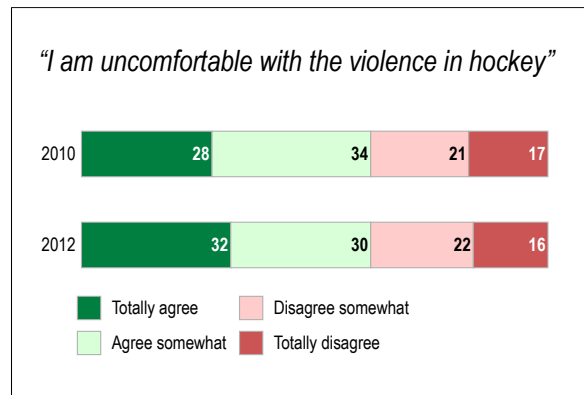
Acceptability of fighting. Fighting is a well-established but increasingly controversial part of NHL hockey, and is now an issue that divides Canadians. Four in ten totally (10%) or somewhat (29%) agree that “*fighting is an acceptable part of hockey*”, compared with six in ten who somewhat (28%) or totally (33%) disagree. Opinions are essentially unchanged since 2010.

Opinions are divided across the country, with some minor shifts since 2010: There is increasing acceptance of fighting in the Prairies and among Canadians without a high school diploma, and declining acceptance among Canadians under 30.

The sharpest divide is, once again, by fan category: Huge hockey fans agree with the statement by a 70% to 30% margin, compared with occasional watchers (40% vs. 60%) and those who are not fans (17%, vs. 83%); opinions have not shifted noticeably since 2010 within any of these segments.

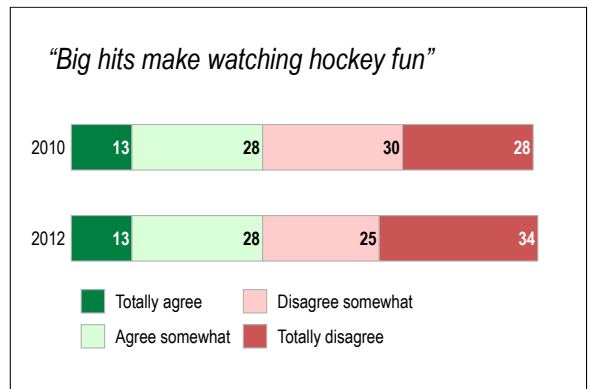
Excitement of big hits. There is a similar divide in attitudes about “big hits” in NHL hockey. Just over four in ten Canadians agree totally (13%) or somewhat (28%) that “*big hits make watching hockey fun*”, versus six in ten who somewhat (25%) or totally (34%) disagree. Overall opinions are unchanged since 2010, but the strength of disagreement has increased (with a 6 point shift from “somewhat” to “total” disagreement).

Not surprisingly, huge fans like big hits (74% to 26%), compared with occasional watchers (39% vs. 61%), and those who don’t follow NHL hockey (20%, vs. 80%). Moreover, there is a growing gap in the views of fans and others, with the former group increasingly positive about the excitement in big hits (up 5 points since 2010) and the latter moving in the opposite direction.



And yet the trend is more nuanced in that declining enthusiasm for big hits has also taken place among some segments of the core audience, including men and anglophones, as well as among key target audiences (Canadians under 30, allophones).

Love or hate Don Cherry? CBC hockey commentator Don Cherry is a provocative figure whose comments often evoke strong reactions. Four in ten Canadians totally (13%) or somewhat (31%) agree with the statement *“I like what Don Cherry has to say”*, versus just over half who somewhat (25%) or totally (31%) disagree. Opinions have not changed over the past two years.



Opinions of Don Cherry have a clear regional dimension: He receives a majority endorsement in Atlantic Canada (54%), Ontario (54%) and the Prairies (55%), but is broadly disliked in Quebec (where only 18% like what he has to say). Albertans and British Columbians are divided, with small majorities expressing a negative view of Don Cherry’s comments.

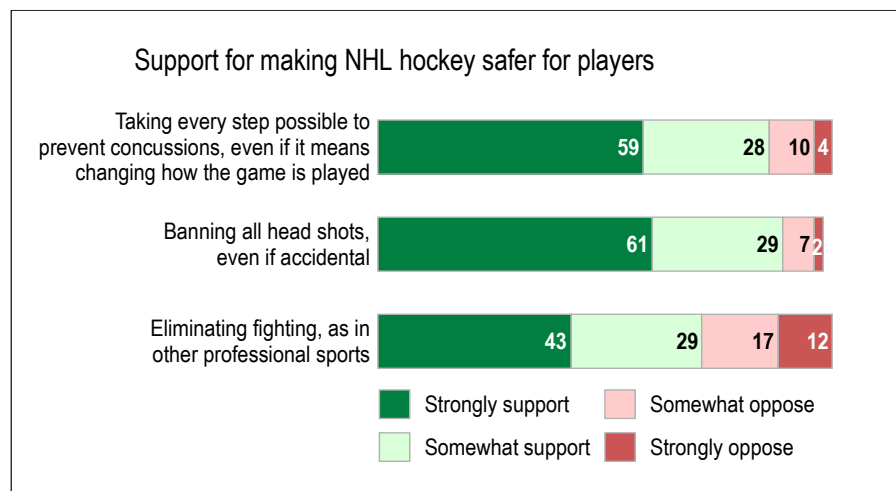
This divided view notwithstanding, Don Cherry remains as popular as ever with the core audience. Huge fans like him by a clear margin (67% versus 33%), compared with occasional watchers (47% vs. 53%), and others (23% versus 77%). Since 2010, there has been a modestly growing divide, with fans growing more positive, and others more critical, of Don Cherry’s remarks.

MAKING NHL HOCKEY A SAFER GAME

There is widespread public support for changes to NHL hockey to improve player safety, including a ban on all head shots and the elimination of fighting. Such changes are endorsed by a majority of the game’s core audience, except in the case of ending fights where opinions are evenly divided.

While Canadians are divided on the merits of fighting and violence in NHL hockey, there is widespread public support for changes to make it a safer game for players.

Changing the game to prevent concussions. Concussions became a central story this past year, with a number of high profile players (most notably Penguins star Sidney Crosby) being put out of action for all or much of the season. Close to nine in ten Canadians strongly (59%) or somewhat (28%) support taking every step possible to prevent concussions, even if this means changing the way the game is played.



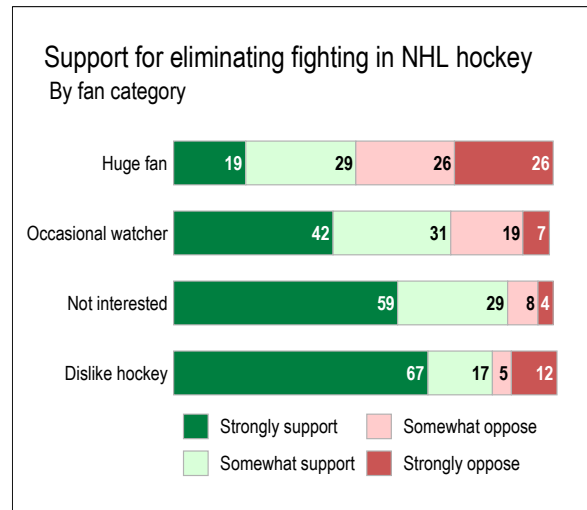
Making changes to prevent concussions receives public endorsement across the country, with strong support most widespread among Canadians 50 plus (71%) and Quebecers (71%), and least so among those under 30 (47%). Even huge hockey fans express overall support for changing the game to prevent concussions (80%), although they are less enthusiastic, with only 43 percent expressing strong support.

Banning all head shots. Current NHL rules prohibit intentional blows to the head but do not penalize accidental hits. Nine in ten strongly (61%) or somewhat (29%) support banning all shots to the head, even those that are accidental. Again, support is widespread, with strong support increasing with age cohort, as well as among Atlantic Canadians and Quebecers. Huge fans support this change by a 88% to 12% margin (with 57% in strong support). This change is also supported by most Canadians who believe that big hits make for exciting hockey (80% vs. 20%), although they are among those least likely to express strong support (40%).

Eliminating fighting from the NHL. The NHL is the only professional sports league that condones (if not promotes) fighting between opposing players, and many who support the status quo argue that fighting is an inherent and necessary part of the professional game. Seven in ten Canadians disagree, expressing strong (43%) or somewhat (29%) support for eliminating fighting, as has been done in other professional sports. Three in ten somewhat (17%) or strongly (12%) oppose this type of change.

In contrast with preventing concussions and banning all hits to the head, the issue of fighting is one that most clearly separates fans and non-fans. Huge fans are divided on this issue, with 48% in support of getting fighting out of hockey, versus 52% who oppose such a change. By comparison, most occasional watchers favour this step (73% versus 27%), and non-fans even more so (86% versus 14%).

Even sharper is the divide among those with differing opinions about the excitement of big hits in NHL hockey. The minority of Canadians who say big hits make for an exciting game are among those least apt to favour the elimination of fighting (29% support such a change), compared with the majority who do not think much of big hits (87%).



Focus on hockey's core fans. Key to the ongoing success of professional hockey, and likely to prospects for meaningful changes to the game, lies with the perspective of its core audience. The NHL and its advertisers pay close attention to this group, so the opinions these fans hold with respect to aggressive play and player safety could play a decisive role in any upcoming decisions.

Hockey's core fan base are as positive as ever about the game, and most do not appear to be having second thoughts about aggressive play, fighting or even big hits as important parts of the fan experience. At the same time, some fans appear to be growing a bit less comfortable about the level of violence, perhaps because of the injuries to key stars which is taking away something valuable from the game. More broadly, despite a strong attachment to the game as it is currently played, a clear majority of core fans endorse changes that will improve player safety, including a ban on all hits to the head. However, these fans are notably less likely to support the elimination of fighting in hockey, perhaps because this is less likely to be seen as a threat to player safety.

Survey Methodology

This survey was conducted between May 2 and 7, 2012 with a representative sample of 1,000 Canadians, drawn from an online panel that has been developed for this type of research. Eligibility for participation was limited to residents of Canada's 10 provinces aged 18 and over. Quotas were established for region, age and gender, and the final survey data were weighted to accurately reflect the demographic composition of the Canadian population (from the most recent Statistics Canada Census information).

Because the sample is based on those who initially self-selected for participation in the panel (rather than drawn randomly from a probability sample), no estimates of sampling error can be calculated. All sample surveys and polls may be subject to multiple sources of error, including, but not limited to sampling error, coverage error, and measurement error. Results are expressed as percentages (unless otherwise noted) and may not add to 100% due to rounding or multiple responses.

The Environics Institute

The Environics Institute for Social Change (www.environicsinstitute.org) was established by Michael Adams in 2006 to promote relevant public opinion and social research on important issues of public policy and social change. The Institute's mandate is to survey individuals and groups not usually heard from, asking questions not normally asked.

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