



Constraints and opportunities for establishing ice hockey as a major professional sport: the case of France

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The development of an « upper-middle sport »

- **An old sport but a young governing body**
 - First national championship in 1907
 - Independent governing body from 2006
 - 5.4 M€ of budget in 2015

- **Sporting aspects are promising**
 - 12-14 world ranking
 - 17 players in foreign leagues (e.g. 3 in NHL, 2 in KHL)
 - 20 474 members in 2015 (+ 21% from 2006)

- **Structure and organisation**
 - Co-host of the World Championship
 - A new national centre opened in 2016



A “glass ceiling to the top”?

■ A visibility and identification issue

- Who knows the top scorer of the Ligue Magnus (top national level)?
- The best players are abroad
- About 55% of French players per team on average

- A significant turnover of teams in the Ligue Magnus
 - Is competitive balance a good thing without celebrity players?
 - Are rivalries enough?

- No visibility of the women’s team



A “glass ceiling to the top”?

- A geographical and therefore economic issue
 - Historically located in the Alps regions
 - Need to develop in bigger urban areas to attract spectators and sponsors
 - No Parisian team in the Ligue Magnus (top national league)



Ligue Magnus 2010-11

- Alps region, East and North-West

- **Biggest cities (urban areas):**

Strasbourg (470 K hab.)

Grenoble (400 000)

Dijon (250 000)

...

Chamonix (10 000)

Mont-Blanc (9 000)

Villard (4 000)

Morzine (3 000)



Ligue Magnus 2016-17

- Same regions + big urban areas
- Biggest cities (city/urban areas):

Lyon (484 K hab., 1 500 K hab.)

Bordeaux (240 K/750 K)

Nice (343 K, 535 K)

...

Gap (40 K/63 K)

Epinal (32 K/95 K)

Chamonix-Morzine (15 K)



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- A cultural issue
 - Cultural change and identity loss
 - The best sports brands provide meaning and signs



A “glass ceiling to the top”?

■ A fan experience issue

- Facilities are generally old and publicly-owned
- Not conceived with fan experience in mind
- Limited by their size

- Lack of marketing focus and skills?
- Lack of understanding of who the spectators and fans are?

■ A professionalization issue

- When structure and skills lead to sporting success





Thank you for your attention

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