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State of the Global Bowling Business

Industry leaders weigh in on where we've been, where we are and where we're going.

BY BOB JOHNSON

Poet and author Maya Angelou famously observed, "You can't really know where you are going until you know where you have been." Similarly, Winston Churchill suggested in a 1948 speech to the British House of Commons, "Those that fail to learn from history are doomed to repeat it." Taking time to reflect can be challenging in a world that's evolving at an ever-faster pace, and the changes taking place in bowling sometimes seem to be turbo-charged.

But understanding both where we've been and where we are today are critical to ensuring a successful future for the bowling industry — an industry that must be healthy if there is to be a future for the sport.

Who better to assess the state of the industry than the people who have skin in the game? Eleven executives took time out of their busy schedules to contribute to this BCM White Paper (in alphabetical order): Chris Chartrand, chief executive officer of Kegel; Pat Ciniello, chairman of the board of QubicaAMF; Corey Dkystra, chief executive officer of Brunswick Bowling Products; Jeremy Felton, vice president of sales and marketing for

the International Business Department of American Bowling Service in Japan; David Frewing, president of US Bowling Corporation; Alex Funk, president of Funk Bowling North America; Tyler Jensen, president of Storm Bowling; Hans Krol, chief executive officer of BowlTech in Europe; Graeme Rose, managing director of Tenpintec/Cybernetic Solutions in Australia; Roberto Simeone, president of Steltronic Scoring; and Paul Sylvia, vice president of Dexter Bowling.

Of Wars and Water Levels

You don't have to tell Igor Plokhov how life can change in the blink of an eye based on events over which one has no control. He was managing a chain of bowling entertainment centers in Ukraine when Russian President Vladimir Putin decided to invade the country and missiles destroyed a shopping center in which one of the bowling venues was located.

After living through the terrifying early days of the war and moving his family to safety in Poland, Plokhov ultimately relocated to Scotland. There, he manages the remaining Lucky Strike centers remotely.

"We managed to open 80% of the locations and operate," he told BCM. "Imagine, while active combat is still going on and cities are bombarded by Russian missiles and bombs, people are ready to play."

While that no doubt is the most extreme example of a "business disruption," the business of bowling is impacted in numerous other ways every day.

"Transit times have been extremely difficult to navigate," says Jensen about shipping bowling balls and other consumer products to various international markets. "With water levels at an all-time low in the Panama Canal and the Red Sea shipping crisis caused by the Houthi rebels, it reminds you that even moving bowling balls is subject to climate and political issues."

Revenue Trends Post-COVID

The global unrest comes at a time when bowling has been enjoying one of the strongest business periods in its history following the mandated business closures during the COVID-19 pandemic.

"The rebound that has happened in the industry just goes to show how much people crave socialization and a sense of community," observes Dykstra. "In speaking with proprietors, many of them had their highest revenues ever in 2022. Many have seen flat business or small declines since then,

but some are still trending higher, and they are responding to the amount of business by reinvesting in their centers in many ways."

That trend was mirrored in Europe where, Krol says, "bowling centers are busy and, more importantly, customers are spending money — more revenue per visitor."

Adds Krol: "The recovery after COVID has been remarkable in all European markets, some stronger than others, of course. As a result, bowling proprietors started to spend some serious money in 2023, resulting in a very good year for

manufacturers and distributors alike."

Sylvia describes the last four years as "a rollercoaster for bowling, with 2020 and 2021 devastated by COVID and 2022 and 2023 seeing record sales volume." But that comes with a caveat: "I don't believe 2022 and 2023 represent a sustainable market... so we are focused on getting back to more traditional sales trends prior to COVID."

The String Era Arrives

Sales trends are all about numbers, and an array of numbers are contributing to "the next big thing" in the

bowling business: the proliferation of string pinsetting machines.

The number of men and women seeking careers as pinsetting machine mechanics is dwindling. The average number of lanes being installed in new builds is decreasing, which lessens the need for full-time mechanics. The number of parts required to keep free fall machines running is much higher than the number of parts used in string machines. It's a math problem that adds up to string machines becoming the choice of more and more proprietors.



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Europe was an early adopter of the machines, both for tenpin bowling and, primarily in non-English-speaking countries, nine-pin bowling. Rose says conversions from free fall machines to strings has been under way for a while in Australia, where most new installations are string machines.

“In 2020, our free fall to string ratio was 75% free fall and 25% string,” says Dykstra. “In 2023, the ratio shifted to 35% free fall and 65% string in the United States.”

He is quick to note, however, that free fall machines aren’t going away.

“We will continue to see proprietors who operate very successful bowling centers with the most advanced technological-based free fall machines,” he says.

A decision by the United States Bowling Congress to certify string machines in the same category as free fall machines caught most in the industry by surprise. The “smart money” was on approval but with some sort of average adjustment involved, similar to that used for Sport Bowling.

“When it was approved in the same category, it blew us away,” says Ciniello. “It was a game changer. Almost overnight, our greatest concern became keeping up with production.”

Frewing shares Ciniello’s excitement about the unexpected development — or, at least, how quickly it came about.

“For at least the last five or six years, the majority of new bowling center installations have been with string machines that were not USBC approved,” he says. “So the trend of the industry moving toward string machines had already been in full motion. The USBC decision to approve string machines for league and tournament play will allow existing centers to make the much-needed change, and will turn out to have one of the greatest impacts on the bowling business in its history.”

Ciniello says he believes that this year alone, QubicaAMF, Brunswick, US Bowling and Funk will collectively

convert “close to 3,000 machines to strings.”

Krol offers a slightly further-reaching prediction: “We expect that over the next three to five years, between 3,000 and 5,000 free fall machines will be replaced [with string machines] in the Netherlands, Belgium, Germany, Switzerland, Denmark, Norway and Sweden.”

An even more revealing number: In the last three years in those seven countries, BowlTech installed 1,860 string machines... and 26 free fall machines.

Although each country has its own bowling federation, European leaders still consider what’s happening in the United States when making decisions that impact the sport.

“String machines are the new norm,” Krol asserts, “and the USBC decision will only strengthen that sentiment across Europe.”

In Japan, Felton says the handful of string installations there “have received high praise from management and bowlers alike.” He adds that he anticipates “increased adoption because of the significant reduction in operating costs and their enhanced safety features.”

Someone says that string machines offer another benefit: There’s no specialized equipment needed for pin detection, nor “any sophisticated software for image analysis.” He adds that all of the major string machine manufacturers have provided the technical information needed for his company’s scoring software to interface with their machines.

Lane Count Trends

Statistics gleaned from BCM’s annual Bowling Center Architecture and Design Awards indicate that the average number of lanes being installed in new builds today has been gradually decreasing over the past two decades. With the exception of unusual markets such as Las Vegas, the days of new centers spanning 60 lanes or more are gone.

“It’s all about value per square foot,” says Ciniello. “With property costing so much today, you have to generate revenue. If you have between 45,000 and 50,000 square feet, you may have only 24 or 28 lanes. You need the rest of the space for all the other amenities — arcades, food and beverage, and the ability to host corporate parties. And you need to maximize your open play hours; shoe rental is huge. As a bowling proprietor, I come from a traditional center background, but I absolutely love the hybrid business model.”

Funk says he sees more and more traditional centers “integrating more forms of entertainment to prolong the time customers are spending there. It’s a shift toward the family entertainment center industry.”

Dykstra notes that “the average center size for the last few years has gone from 16 down to 13 lanes — but some of the decrease [can be attributed to] the overall number of centers built. We have seen big increases in the number of boutique centers, whether they be lanes that are part of a hotel-resort, a restaurant or a bar venue. They typically range from six to eight lanes and that brings down the average for the total market... We still see a fair number of 20- to 32-lane installations in the FEC or hybrid models.”

At US Bowling, Frewing says the most common number of lanes in new builds is between six and 16.

“This has been true for the last 10 years,” he says. “In today’s world, bowling is just one of the major revenue generators in these new, upscale venues.”

Rose says that the average number of lanes in Down Under new builds is around 12 in small to medium-sized FECs. A number of retirement villages have added a pair of lanes to their recreation facilities.

Ciniello says his company is seeing average installations of “between 18 and 24 lanes in the United States. The Main Events and Bowleros are still going to build a little bigger; European markets will be smaller.”

And in Europe, Krol adds, “If I average it out, 87% of the centers we are building are FECs.”

That said, don’t count out the sport entirely. As Jensen notes, there’s a 44-lane, state-of-the-art stadium about to open just outside Seoul, South Korea.

“When I toured the facility, I’m not sure if I ever closed my mouth,” he says. “Seeing it first-hand reminded me of the first time I walked into the National Bowling Stadium (in Reno, Nevada). I was in awe the entire tour. Every detail that could have been thought of for a world-class bowling facility has been thought out, all the way down to the logistics of the parking garage.”

A Q3 or Q4 opening is anticipated.

Such venues serve as a reminder that lane care — and lane care products — remain relevant even in an age when FEC and hybrid business models are proliferating.

“Our bread and butter is definitely the competitive bowling scene, but FECs and hybrid centers still need to maintain their lanes,” says Chartrand. “In a purely entertainment setting, the centers will definitely use less lane conditioner, but hybrid centers tend to condition their lanes like traditional centers for consistency.”

Adds Chartrand: “The various ways lane maintenance is implemented — from traditional centers to FECs to hybrids — remains similar around the world.”

The Consumer Side

Bowling’s consumer products sector has long targeted the competitive side of the game — the league and/or tournament bowler hoping to improve their average or win some prize money. How is it faring during this perceived period of transition?

“League and tournament bowling remains strong, and this continued success is providing steady sales for consumer products,” says Dykstra. “The market for performance bowling balls remains strong. There has been a

noticeable decrease in sales of entry-level balls, bags and shoes over the past 15 months, driven primarily by the reduced number of new recreational bowlers investing in equipment as compared to the boom that occurred coming out of the pandemic in 2022. The market for new bowlers has tapered off a bit, but we anticipate that this market will rebound later this year.”

Storm has long focused on the competitive side of bowling, and Jensen says that realm is evolving.

“We are seeing the amateur-level player grow and increase more than the professional type,” he says. “The exciting part of this movement is we are getting more requests for technical support from the pro shop side, as well as more requests on teaching amateur bowlers the technical aspects of bowling — not only the mechanics of bowling, but also the dynamics of bowling balls.”

Jensen adds that the global bowling ball market is still trending in the right direction but is not without its challenges.

“There have been some strong challenges that have been frustrating because they are out of our control,” he says. “The first is the strength of the dollar. This has been especially hard in Japan, where the dollar has been at all-time highs to the yen. Other markets like Korea have battled the strength of the dollar, and there has been some relief in those markets compared to Japan.”

A Look in the Crystal Ball

Indeed, leaders almost unanimously see Japan — which has declined from more than 3,600 centers at its peak in 1972 to around 660 post-COVID — as one of the industry’s few cold markets because of the country’s economic woes. Two signs of hope: Most of the remaining centers are outperforming their pre-COVID numbers, and the South Korean market, which often parallels that of Japan, has seen its number of centers increase recently.

Dykstra points to South Korea, Southeast Asia and Europe as warm markets, while North America remains hot. Ciniello agrees that Japan is a cold market but sees it as an opportunity. He adds that several parts of Europe are doing well and sees Vietnam as an emerging market.

Krol, whose company serves a vast swath of Europe, polled his various offices to gauge the relative health of bowling across the continent. Reports indicate that while the Baltic states, Finland and Portugal are cool, other markets are doing well. Germany, Switzerland, Austria, France, Denmark, Sweden, Norway and the U.K. are all considered warm, while the Netherlands and Belgium are hot.

The United States and Europe remain strong markets for US Bowling, while western Europe, Scandinavia, Malaysia, Philippines, Singapore and Vietnam have complemented Kegel’s strong U.S. business.

Frewing notes that bowling exploded in popularity in the United States during the 1950s and ’60s, joined by Japan in the ’70s, Europe in the ’80s, Asia in the ’90s, Eastern Europe in the 2000s and the Middle East over the past 10 years. He adds that while those markets are now “pretty saturated,” they still provide an opportunity for growth via equipment upgrades.

Adds Chartrand: “The new business models balancing recreation and sport will ideally provide a solid financial foundation for future success. We need bowling centers to be open and thriving for a new generation of customers to fall in love with bowling and become lifelong enthusiasts.”

Krol says he is optimistic about bowling’s future, in part because of its glorious past.

“Bowling is an evergreen [activity] with a long and rich history,” he says. “It has adapted to today’s high-tech world with a fresh look and feel. To me, that seems to be a perfect cocktail for success — for proprietors and manufacturers alike.”