



## Understanding Consumer Perceptions of Bowling and the Opportunity for Bowling Innovation

*Why do people choose bowling today? What gets in the way? How can HyperBowling reinvent the traditional game—to attract more players and help grow revenues?*

August 2019

### Key Takeaways:

- Bowling endures as one of the world's most popular recreational activities, but still there is an opportunity to reach people who are not bowling today
- Players' actual or perceived lack of skill, plus aspects of the traditional ten-frame game, create barriers to full bowling enjoyment
- HyperBowling builds on and improves the most successful aspects of traditional bowling
- HyperBowling offers the engagement and interactivity of a video game but on a real bowling lane, with exciting sounds and visuals, progressively challenging levels, moving targets and score multipliers
- Research proves that HyperBowling can attract more players, spur more repeat visits, and boost spend-per-visit

### The Challenge:

#### How to reach millions of the world's non-bowlers

Bowling is the primary reason many people visit entertainment centers. When they bowl more, they spend more around the facility on food and beverages, plus arcade and other attractions, delivering a rising tide effect on revenues.

Still, in spite of bowling's enduring popularity, there are millions of people who don't bowl. Only about 15% of the U.S. population bowls in any given year with similar statistics in other mature bowling markets. The question is, why? We at QubicaAMF accepted this as a challenge and conceived a compelling proposition: Reinventing bowling to make it even more attractive and relevant would be a revolutionary advancement and major boon for the entire entertainment industry.

#### Objective: Introduce millions of new bowlers to the game, re-energize casual players, and ignite a stream of repeat bowling business

Given the inherent value of bowling as a recreational activity, and its untapped revenue-producing power, we asked, "Is there a prevalent unmet need bowling is not fulfilling today?"

On that basis we sought to more fully understand consumer feelings and perceptions about traditional bowling, looked to find unseen opportunities within the bowling market, and strived to determine whether the market would be receptive to innovative "reinventions" of the game.

Accordingly, QubicaAMF commissioned a quarter-million-dollar multi-phase market study employing two professional research firms to reach and interact with more than 1,000 consumers. Three phases have been completed to date with a fourth planned for later in 2019. The focus of the study was primarily on casual, social bowlers.

The results of the completed phases are eye-opening. What's more, they have confirmed the need for a new product designed to attract and introduce millions of new bowlers to the game, re-energize casual players, and ignite a stream of repeat bowling business.

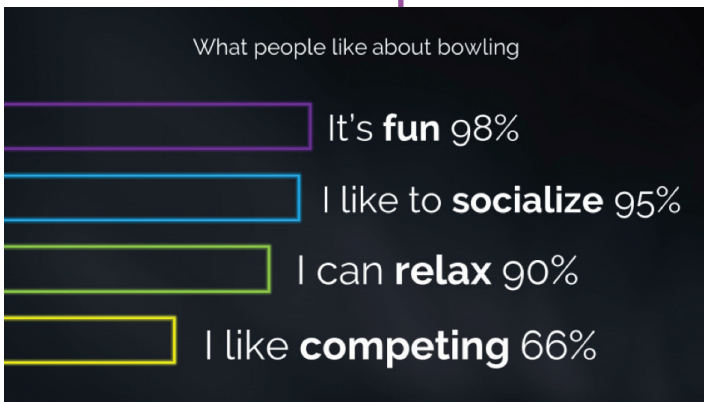
**QubicaAMF's quarter-million-dollar market study confirmed the need to introduce an exciting new product designed to re-energize players and introduce millions of new bowlers to the game.**



**Market Study Phase I:  
Confirming likes and dislikes about traditional bowling**

**Conclusion: While bowling continues to be popular for all ages, players' actual or perceived lack of skill, plus aspects of the traditional ten-frame game, create barriers to full enjoyment and repeat visits.**

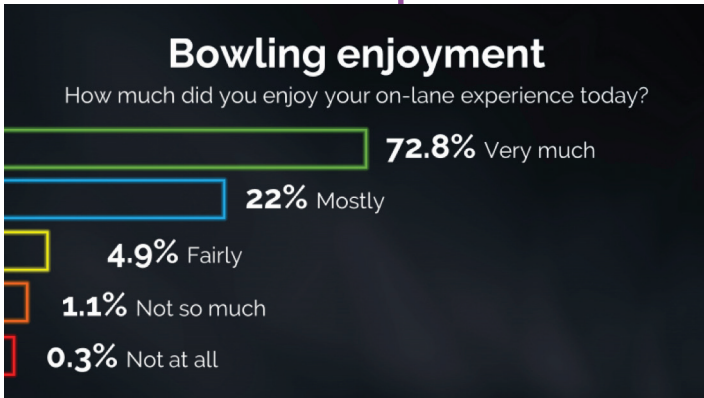
To understand how people feel about bowling today, the first study focused on consumer motivations and perceptions. Respondents were asked to complete an electronic survey after bowling in real centers during peak periods on Fridays, Saturdays or Sundays.



A lot to like

The research showed that people bowl for one or more of the following reasons: 98% bowl because it's fun; 95% because they like to socialize; 90% because they find it relaxing; and 66% because they like to compete.

**95.7% of people believe that bowling is good to play in a group with friends and family**



When asked about their most recent visit to a center, the results are typically good – 73% of people say that they enjoyed their experience very much. This echoes the belief that most people generally like bowling and have a good time when they do it.

Barriers to full player engagement

While there are many aspects of bowling people really like, research also suggested there are barriers standing in the way of their complete engagement and enjoyment of the game, notably regarding decisions over whether and how often to bowl again. These negative feelings seemed to be centered around players' self-perception of their skills and with the dynamics of traditional ten-frame bowling.

**68% of survey respondents believe becoming a skilled bowler takes a lot of time and effort**

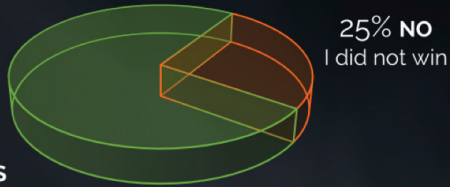


A closer look showed that nearly two-thirds of respondents rated their bowling skills as a five or less on a scale of one to ten. In other words, the vast majority of people do not believe they bowl well. These real or imagined limitations can stifle the competitive aspects of the game in the minds of many players, convincing them they have no real chance of winning.



### Winning drives return visits

Of those extremely/very likely to bowl again in the next three months...



There's also a strong relationship between winning and coming back to bowl again sooner. Among those who answered that they were very or extremely likely to go bowling again in the next three months – 75% of those were people who either won or said they almost won a game during their last visit.

People that bowl a little better feel more engaged and bowl more frequently. Above average bowlers visit 5.8 times per year while below average bowlers visit 3.7 times per year. Whether they bowl better because they come more often or if they come more often because they bowl better and enjoy the game more – there is a clear relationship between people's skills and how often they visit.

### Consumer Bowling Barriers

- "I'm tired of waiting for my turn, I want to do it now."
- "It can get monotonous, which is why I never bothered to participate."
- "I don't want to play a game I get frustrated at."
- "When somebody's blowing you out, you...I don't want to say give up, but you know."

People with above average skills bowl on average 2 more times per year

The traditional game format can cause even more barriers for play. It typically takes more than 12 minutes for a casual player to finish a game. Or, with five people on the lane, it can take an hour to produce a single winner. People often have to wait between frames and can quickly find the game repetitive and tedious. As soon as they feel bored or believe they can't win, players stop trying—and stop playing. While they may continue to enjoy the social aspect of bowling in such cases, they may no longer feel part of the game.

### The Solution







#### QubicaAMF introduces HyperBowling

Phase I of our market research helped us draw some very important conclusions:

Despite the high marks many respondents gave individual bowling visits, bowling fails to fulfill people's desire to feel that they can win, and the desire that all people have to be fully engaged and excited throughout the game. To want to feel part of the game, regardless of their bowling skills and experience.

### The best kept secret in bowling

Bowling fails to fulfill most people's desire to feel they can WIN

- |                                                                                               |                                                                                                 |
|-----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
|  Fun       |  Competitive |
|  Socialize |  Engagement  |
|  Relax     |  Excitement  |

Most people generally enjoy bowling in a given visit because it is fun, social and relaxing. But many people don't enjoy the competition, don't feel as engaged and don't think that they can win. Simply, they don't feel part of the game because they are not good bowlers and the traditional game is not a good fit.

This, together with our drive to innovate and find new ways to bring more people to bowling, confirmed our course to develop an alternative to traditional bowling—one that would build on the classic game and entice both casual and skilled players, along with millions of non-bowlers.



That game is called **HyperBowling**.

**45% of bowlers were willing to try a game based on bumpers**

### **HyperBowling fulfills unmet player needs**

HyperBowling makes it easier for players without traditional bowling skills to feel the same excitement of those with skills. It provides all the engagement and interactivity of a video game but on a real bowling lane, complete with exciting sounds and visuals, progressively challenging levels, moving targets and score multipliers.

### **HyperBowling Player Benefits**

- A more level playing field
- Dynamic gameplay
- A better chance to compete and win
- Superior engagement
- More overall fun

In HyperBowling, every ball is different. Players are challenged to hit colorful moving targets to increase their score. Lights change, game levels change and—with one single ball—leads can change as well. This eliminates boredom, evens out the playing field to account for differences in player skills, and gives everyone the chance to win.

In short, HyperBowling is designed to attract millions more to the game of bowling and, in so doing, add significantly more revenue and profitability to entertainment centers.

### **Market Study Phase II:**

#### **Determining what people think about HyperBowling**

***Conclusion: There's a lot to like about HyperBowling.***

To understand how people feel about HyperBowling and how it compares the traditional game, QubicaAMF's research team first conducted a qualitative test through a series of focus groups. Lead respondents were chosen to play the game, but also asked to recruit family, friends and co-workers—not strangers—to participate with them, thus replicating how people bowl in the real world.

These teams spent 45 minutes HyperBowling in an actual center. Immediately after, they were invited into a moderated group discussion to discuss their impressions of the game and their feelings toward traditional bowling as well.

### **Market Study Phase III:**

#### **Validation through quantitative testing**

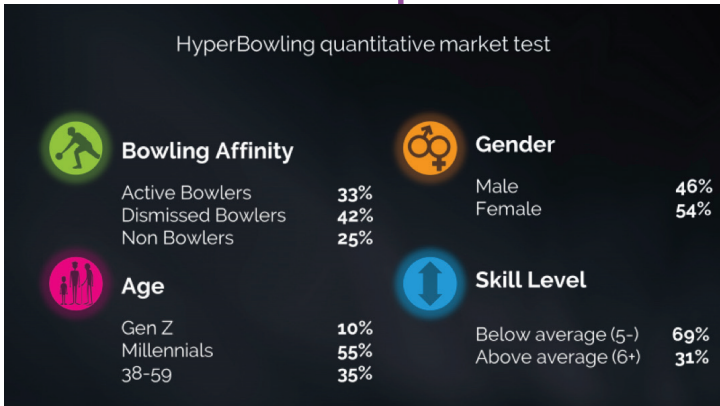
***Conclusion: Bowlers have a high affinity for HyperBowling.***

Focus group feedback was subsequently used as the basis for an expansive quantitative market test to measure and validate the responses.

The research team recruited a large sample of both active casual bowlers and of the larger potential market, including those who no longer bowl or have never bowled. The sample combined various age groups, all genders, and encompassed a variety of self-identified bowling skills.



**Almost two-thirds of the research respondents were Gen Z and Millennials**



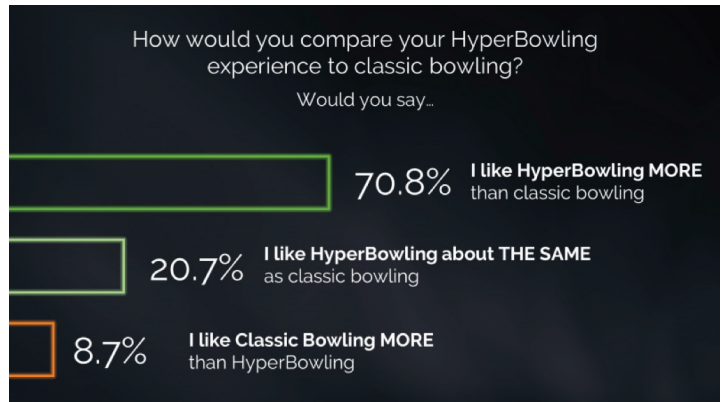
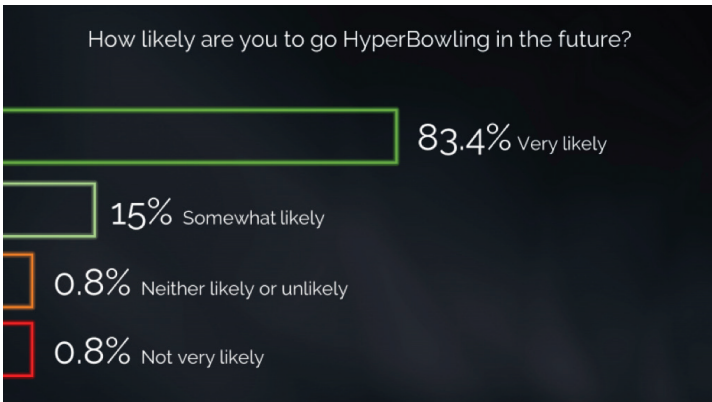
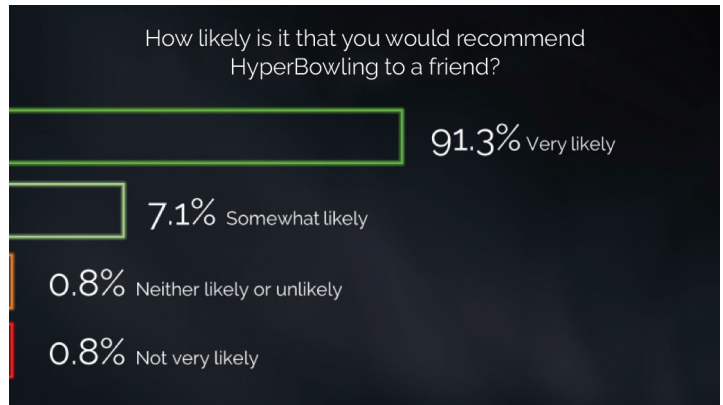
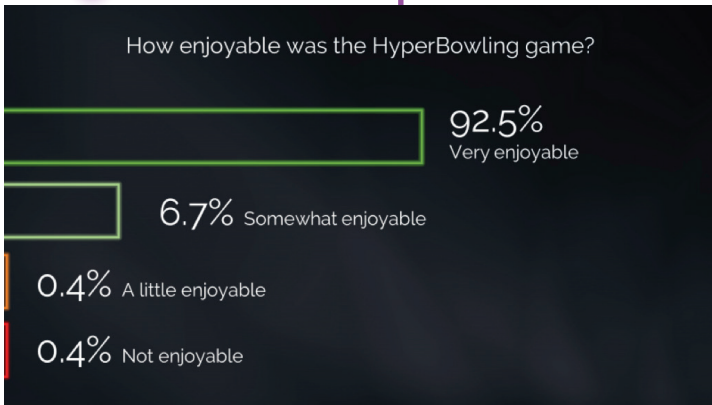
The respondents visited a HyperBowling center, completed a "before" survey on their perceptions of bowling, played HyperBowling for about 45 minutes and then completed an "after" survey on their perceptions of HyperBowling.

Combined with the results of the qualitative focus group study, the quantitative market study resoundingly showed that bowlers had a high affinity for HyperBowling based on five summary driver categories.

They enjoyed it because it levels the playing field. They liked its dynamic and unique gameplay. They had the chance to win and fully enjoy the competition. They stayed engaged for the duration of the game, and they said they had a lot of fun until the very end of the game.

All but a very small percentage of respondents—a full 99.6%—found HyperBowling enjoyable. The vast majority (98.4%) would recommend it to a friend. 98.4% stated they would go HyperBowling in the future. And 70.8% indicated they liked HyperBowling more than classic bowling in terms of pure enjoyment, ease of learning, competition, engagement and winning.

**HyperBowling has a Net Promoter Score (NPS) of 89**





### HyperBowling unleashes the game's full potential

HyperBowling builds on and improves the most successful aspects of traditional bowling: it's fun, social and relaxing. But it goes far beyond by fulfilling peoples' inherent desire to compete, have a chance at winning and to feel fully engaged until the very end of the game.

Here are the top 10 most prevalent statements ranked by how many participants COMPLETELY AGREED with each:

### Why Consumers Find HyperBowling So Compelling

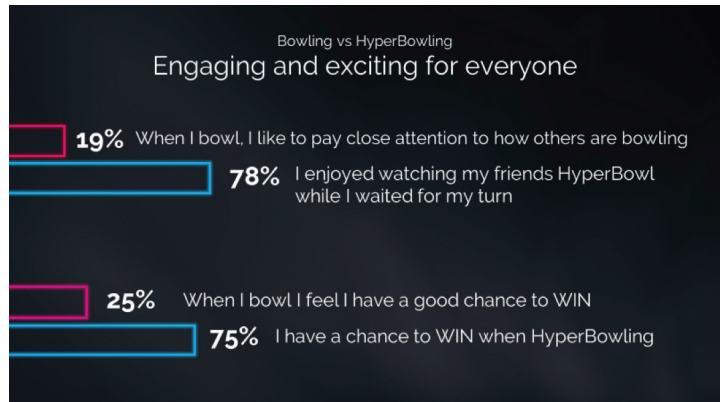
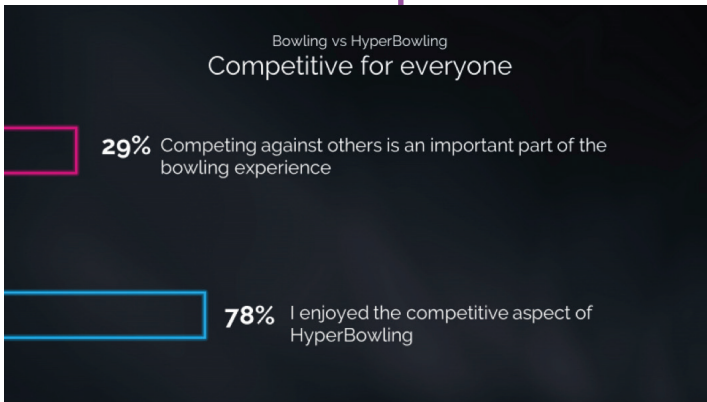
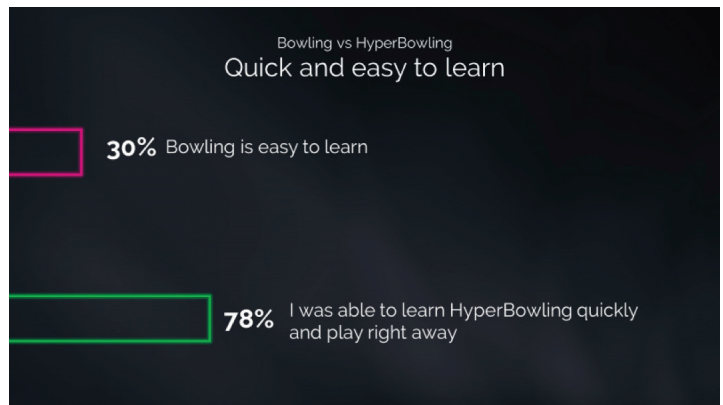
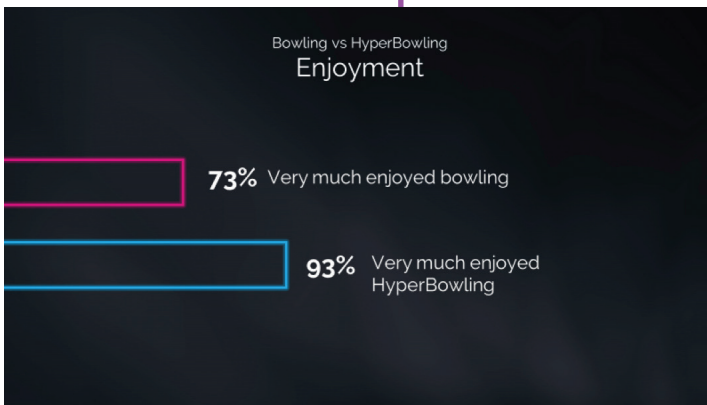
"HyperBowling is fun to play in a group with family and friends"	91%
"HyperBowling is a lot of fun"	89%
"The multipliers associated with the colors on the bumper add to the fun and excitement of HyperBowling"	83%
"I enjoyed the different levels and moving to the next level of HyperBowling"	81%
"With a good shot it is possible to come back from behind to win HyperBowling"	80%
"Anyone can play HyperBowling together regardless of their traditional bowling skills"	79%
"I was able to learn HyperBowling quickly and play right away"	78%
"I enjoyed the competitive aspect of HyperBowling"	78%
"I enjoyed watching my friends HyperBowl while I waited for my turn"	78%
"I feel that I have a chance to win when HyperBowling"	75%



### Comparisons to classic bowling

Because of the new gameplay and the above drivers of this new experience, HyperBowling outperforms classic bowling in five key areas: enjoyment, learning, competition, engagement and winning.

Here are the results when comparing like-kind Bowling and HyperBowling drivers:



### **Conclusion: HyperBowling extends the reach of bowling.**

There are three key areas in which HyperBowling can help unleash the full potential of bowling:

- HyperBowling will help attract the 85% of the people who do not bowl today**  
 According to the data, 72% of the non-active, non-bowling population would enjoy HyperBowling more than classic bowling. And 83% of them are very likely to go HyperBowling in the future.
- HyperBowling will drive more repeat visits from everyone**  
**People said they would visit a center almost 3 times more per year**  
 Asked how much more frequently they would visit a center with both classic and HyperBowling available, 86% of respondents said they would bowl at least once more per year. On average, people said they would visit 2.8 more times per year because of HyperBowling.



### 3. Customers will likely be willing to pay more for HyperBowling

#### **On average, people said they would pay almost \$3 more per person, per hour for HyperBowling**

75% of respondents polled indicated they would pay more for HyperBowling than classic bowling. On average, they said they would pay \$2.92 per person, per hour more for the experience.

While millions around the world enjoy—and will continue to enjoy—the game of traditional bowling, millions more would participate if certain perceived barriers were eliminated, or the game were enhanced.

HyperBowling achieves this. It promises to revolutionize the game, offering proven potential to extend operators' reach beyond the existing bowling population – particularly to Gen Z and Millennials. It can re-energize occasional or lapsed players, and in doing so increase spending, frequency of visits and, ultimately, revenue.





## The response to HyperBowling, feedback from the earliest adopting centers



### MIDDELBURG

**Center:** HyperBowling Middelburg  
Middelburg, Netherlands

**Bowling Lanes:** 8 Lanes,  
all HyperBowling

**Owners:** Jasper van Rijnsoever  
Ronald Vree

We thought bowling was kind of old fashioned, so we were a little weary about adding it or not to our new project. When we heard about HyperBowling where it is like a combination between gaming and bowling, we thought it could be really cool!

One of the most important things is that it is truly new. We are entrepreneurs that really develop and market new experiences. HyperBowling is one of the most exciting new things that we've seen in last few years!

Since we opened with HyperBowling it has exploded – it's really impressive. People come here and 90% of them choose to do HyperBowling instead of regular, classic bowling. We also see that 95% of them stay with it for their entire session – only 5% of people try a little classic bowling at the end.

HyperBowling allows us to create and deliver a premium experience that customers are willing to pay for. We charge about 20% more compared to all of the bowling competitors around us.

#### HyperBowling Middelburg

90% of people choose HyperBowling  
95% of people stay with HyperBowling  
20% higher bowling pricing vs. premium competitors



**Center:** HeadPinz  
Fort Myers, Florida

**Bowling Lanes:** 24 Lanes,  
8 Lanes  
of HyperBowling

**General Manager:** Curtis Stavich

If something is new, we want it! We purchased HyperBowling to help us stand out against new and growing non-bowling competitors. Not everyone can do all of these new activities, but we know anyone can play HyperBowling so it makes us a more attractive choice for more people. It keeps us fresh and competitive.

Our customers really enjoy the different experience that HyperBowling brings. It's not the same thing every time – it's fresh each time they play. This is just what we wanted for our VIP experience. HyperBowling acts as a great anchor for our premium experience – something that gives guests something really exciting to play together that they can do even if they've never really bowled before.

It's appealing to a wide range of people and different ages – which is nice to see. Our company parties and events do really well with it since those are often visits that include people who don't normally bowl. Since HyperBowling is easy for everyone, it allows us to keep the focus on the "social" – people stay longer while eating and drinking together.

Our VIP bowling revenue is up almost 8% since adding HyperBowling. This is our most expensive, premium offering. Group events are up, including their total spending on bowling and food and beverage. Our "buyout" revenue is up 10% too. Guests are booking VIP lanes before regular lanes, and those reservations are filling up first during our busiest times. And the trend is positive – today more than 15% of actual lane time is HyperBowling and that continues to grow. Now, we've got a steady stream of people who walk in the door asking for it by name.

#### HeadPinz

+8% VIP bowling revenue  
+15% of all bowling is HyperBowling  
Premium VIP lanes book first



**Center:** Sun Valley Lanes  
Lincoln, Nebraska

**Bowling Lanes:** 32 Lanes,  
all HyperBowling

**Owner:** John Losito

Our staff likes watching people have fun with it. The staff who work our VIP room really like it – customers are happy, they don’t get bored and they don’t get frustrated or mad like they sometimes do with regular bowling. Our team sees it as good for business.

We’re also really impressed with how HyperBowling elevates the overall entertainment we can offer – not only with the games but with the lights, look and feel. It reinforces that we are the premier destination for entertainment in our community!

The response to HyperBowling has been overwhelmingly positive! Our staff has literally not heard any negative feedback about the new games. Sometimes the “best” bowler in the group grumbles because everyone else will get a chance to shine – but even that is the exception and not the rule. Customers are now routinely coming in and asking to play. They may not recognize the name yet, but they recognize a cool new way to play. They’re calling and asking “when is it available, when can I try that new thing” or booking it directly online.

We’re seeing a diverse range of players of different ages. Two groups that are standing out are college groups and families. The college crowd is eager to try something new, and it’s a good fit for those who aren’t all-star bowlers to play together. Guys on dates are even able to deal with the fact that the girls win a lot! Parents are seeing their kids having a great time playing all together and want to keep coming back for more.

Bowlers find it engaging. Everyone is in the game, people pay attention and really get into the action, plus the pace of play is faster and upbeat and they are more in-tune with what is happening on the lane.

For several years I’d been considering converting to an FEC. HyperBowling provided an awesome potential to keep all of my lanes full and avoid sacrificing them to create other revenue sources. We not only get more bowling revenue, but the ancillary sales like food and beverage that come with lots of people bowling and now HyperBowling.

I’m very satisfied that HyperBowling is helping grow my business – particularly since we are playing against some shiny new competition that opened at the end of last year. We’ve raised all of our non-league pricing by 10% and make HyperBowling an available choice anytime someone wants to play. Today our open play revenue is up by almost 16% overall compared to before HyperBowling. Our web reservations are up – people want to book in advance even more since adding HyperBowling. We’ve got food and beverage growth too, 7% more revenue all from the extra open play – people stay a bit longer and eat and drink a bit more.

HyperBowling makes bowling feel like it is in the future. We have to be relevant to people. The fact that I can switch back and forth between traditional and HyperBowling with just the push of a button is excellent. HyperBowling takes the attributes that are appealing about sport bowling and makes them meaningful for current and future generations.

**Sun Valley Lanes**

- +10% increase in open play pricing
- +16% open bowling revenue
- +1,500 additional open play visits



**Center:** Cinergy Entertainment  
 Amarillo, Texas  
 Tulsa, Oklahoma  
 Odessa, Texas  
 + New Project

**Bowling Lanes:** 4 Locations,  
 66 total Lanes,  
 all HyperBowling

**Vice President:** Todd Maunsell



**Center:** Premier Lanes  
 Entertainment Center  
 Gonzales, Louisiana

**Bowling Lanes:** 26 Lanes,  
 8 Lanes  
 of HyperBowling

**General Manager:** Stuart Moss

After careful consideration of how bowling fits into our attraction model, we found HyperBowling perfect for those that are looking for a non-traditional social bowling experience while still being able to keep traditional 10 frame bowling.

HyperBowling is attractive to us as it fits our guest demographics and the response from guests is very positive. It’s been appealing to all ages but has really been concentrated around teens to forty-somethings. They find it engaging, fast-paced, videogame-like and very easy to use – there is little learning curve for those trying it for the first time. Our guests tell us that the fun created by HyperBowling keeps people much more engaged – rather than being on their phones between shots.

We are impressed with the game style and this ability to hold people’s interest while playing. We believe that we can leverage that and are looking to create events around HyperBowling. As with all new attractions in our industry, it is all about content and the ability to change the content and keep things fresh. HyperBowling answers these challenges to keep our guests involved and wanting to try again.

We are including HyperBowling in all of our bowling projects – it will be a core part of the Cinergy bowling experience!

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We decided to be among the first to add HyperBowling because we were looking for new ways to attract customers and enhance parties. HyperBowling had the potential to bring in a younger crowd and introduce them to something outside of traditional bowling. We were optimistic about repeat customers that will bring in new friends.

The response has been very positive! Pre-teens to young adults are most excited to hear about it and are open to trying it. Young couples enjoy it as well since they can play together. Older adults are a bit cautious about using bumpers but will play if you explain that games like HyperBowl and especially HyperActive level the playing field and add a lot of fun.

HyperBowling is exciting, fast-paced, engaging and challenging – all with a video game atmosphere that appeals. It gives us the opportunity to provide a different experience than just traditional bowling. Fun group challenges. The ability for people to come back and continue above the levels they have already accomplished.

People like that the games are interactive and different at every level. They like the big scoring, and seeing their scores getting into the thousands and making a “3000” shot. Even people that are apprehensive of the bumpers mention that they like it once they start doing it. During glow bowling, the bumper and pin deck lighting looks impressive.

We’re currently offering HyperBowling only during open play, charging a little bit more compared to regular bowling – and plan to move into parties next. We see great potential to sell more birthday parties and to attract group events with HyperBowling.

Our staff is feeling more comfortable everyday with talking about HyperBowling and selling it to customers. They really like that people respond well to it – it’s new, different and very exclusive – they can’t get this anywhere else. It’s energizing for them to introduce people to it and watch how it levels the playing field and see people having genuine fun with it.



**QUBICAAMF**  
MAKING BOWLING AMAZING



**Center:** River City Roll  
Richmond, Virginia

**Bowling Lanes:** 20 Lanes,  
all HyperBowling

**Owner:** Rob Long



**Center:** Claus Event Center  
Hoofddorp, Netherlands

**Bowling Lanes:** 20 Lanes,  
all HyperBowling

**Owner:** Jelrick Claus

As a non-bowler, when I first saw the concept of HyperBowling I thought it was awesome! I don't have the attention for the regular ten-frame game and this was a better fit. And I thought that it would be a perfect fit for the target demographic for our facility – young professionals who likely feel the same way about traditional bowling as I do.

It's a bit of a challenge to get people to try sometimes – you have to get past the stigma and their expectations of traditional bowling – but once they play they really enjoy the games and play through. I'm pleasantly surprised at how much younger people love the video-game nature of it – it really is a great choice for them. People like the speed and pace of the games, and that there can be multiple winners when they play.

Our staff really loves it too because people stay longer and eat and drink more. People like to "celebrate" Hyper Shots. More excitement on the lanes creates bigger tips! We're selling about 15-20% more food and beverage when HyperBowling is on for a group.

I'm most impressed with the fact that HyperBowling is differentiating us as something new and different and a better fit for most people. It's still bowling, but it allows opportunities to offer a truly high-end entertainment experience.

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We invested in HyperBowling because we needed to innovate. Our bowling was the last part of our Event Center that needed an upgrade. Everything was outdated and did not match our target audience or our vision. When we saw the potential of HyperBowling to match both, our choice was easily made. We are the first and most innovative center in Holland and have definitely had an impact on the industry here.

Not all of our customers are perfect early adopters of something new like this – most people still visit us for "normal" bowling. But, when people are introduced and do play HyperBowling most of them (more than 75%) enjoy it! It's a great game for any bowler, but it's really strong for the recreational guests that don't really like bowling. There's always a few of those in each group and I think HyperBowling makes those people enjoy the game and the visit so much more!

Before HyperBowling, during tours for private parties we always did a short tour through the bowling – there was nothing unique to show. Now we actually have something to talk about! Guests are always interested in HyperBowling and how innovative it is. People are very curious and enthusiastic about this new bowling game. It makes bowling a great add-on to the rest of the Event Center now!

To learn more visit  
[www.qubicaamf.com/hyperrevolution](http://www.qubicaamf.com/hyperrevolution)

