

INTERNATIONAL
BOWLING INDUSTRY

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THE WORLD'S ONLY MAGAZINE DEVOTED EXCLUSIVELY TO THE BUSINESS OF BOWLING



BOWLING ACROSS THE POND

What does the bowling business look like in Europe?

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REACH**

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INTERNATIONAL BOWLING INDUSTRY
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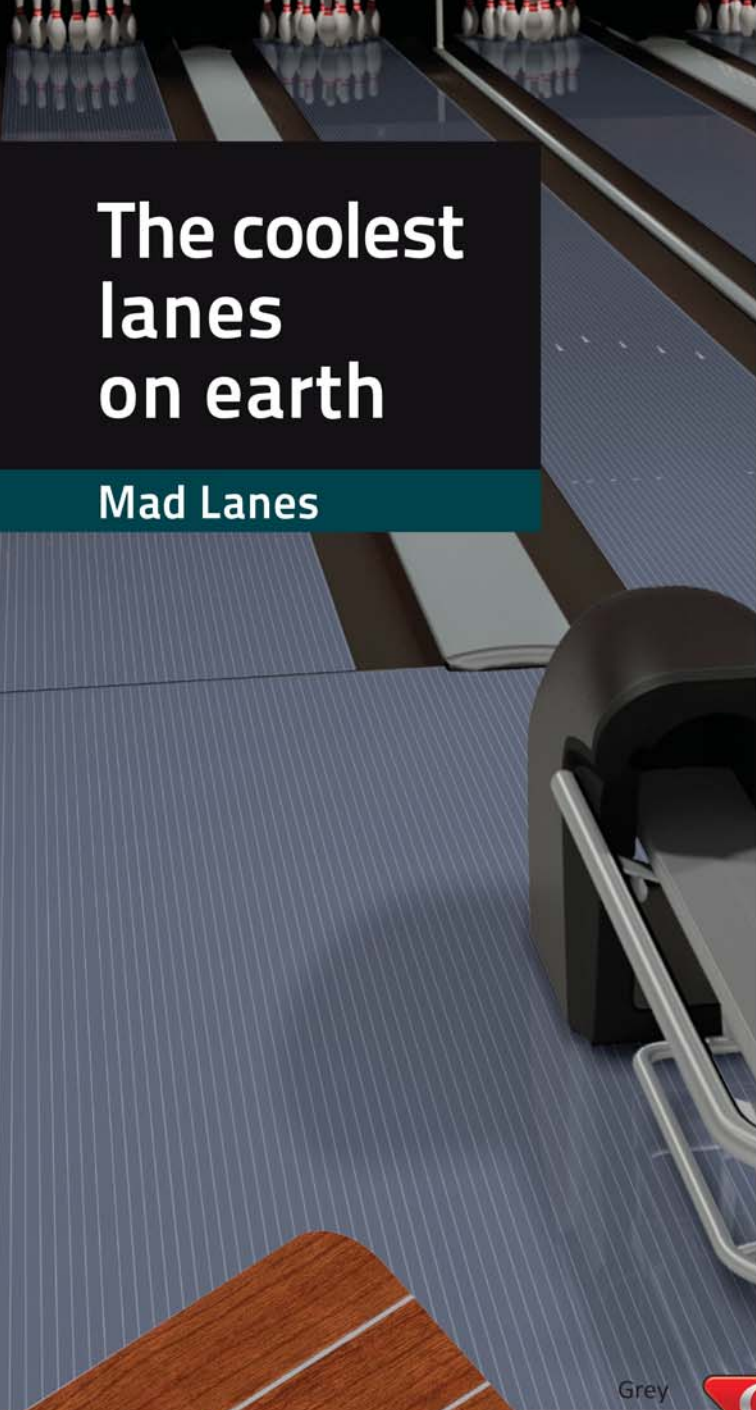
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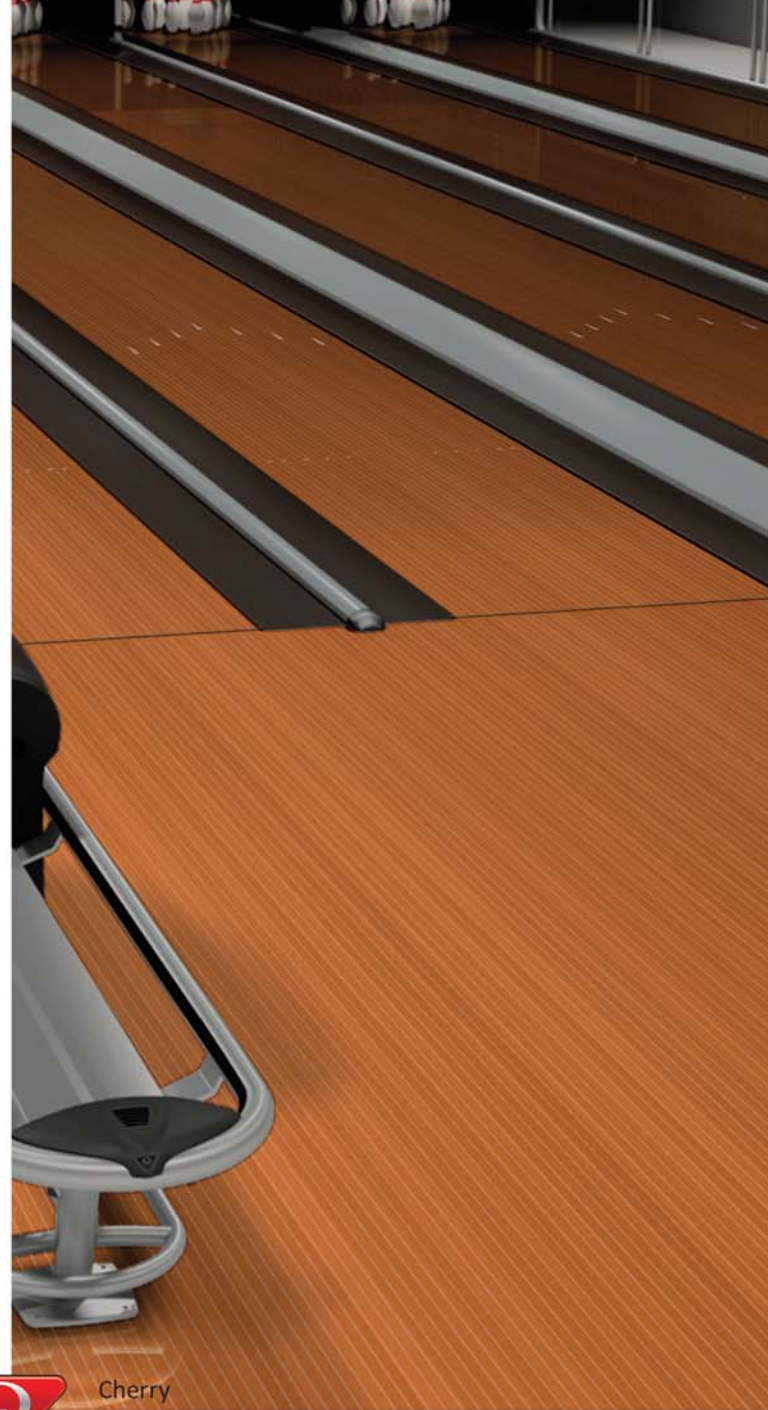


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WELCOME BACK!

QubicaAMF's 51st Bowling World Cup will be living it up at Sam's Town in Las Vegas.

■ By Paul Lane

In early 1965, the promotion department at AMF's international headquarters in London manually assembled operations manuals for team coordinators around the world who would be running elimination tournaments to select their national representatives who would participate in the first AMF Bowling World Cup, then called the Coca-Cola International Masters Tournament.

Twenty countries took part in that inaugural event, which was staged at the Stillorgan Bowl in Ireland. Little did AMF suspect that the Bowling World Cup, the brain child of the flamboyant public relations director of AMF, Victor Kalman, would in years to come develop into the largest annual sporting event in the world in terms of participating countries.

Winning QubicaAMF's Bowling World Cup annual title has been the most coveted goal of bowlers from all corners of the globe, a fact endorsed by the sheer volume of entries in elimination - one man and one woman from each participating country. It's the single largest promotion for bowling in the international arena.

With its long history of changes in both leadership and ownership at AMF, now QubicaAMF, one thing has never changed: successive owners and leaders all embraced and endorsed the tournament, recognizing the value of the Bowling World Cup to their customers and bowlers around the globe.

Juan Cabezas, president of QubicaAMF Worldwide, shares, "I doubt if anyone realized back in 1965 just how prestigious the QubicaAMF Bowling World Cup was to become. Last year

was my first visit to the event and it blew me away. It is clear that bowlers and center managers from all over the world appreciate the input of QubicaAMF and our long-lasting support for the industry and for the sport. For us, it is not just a chance to host the world's greatest tournament but also to show our appreciation to our customers and to continue to develop markets all around the globe."



Juan Cabezas

This year, the QubicaAMF Bowling World Cup (BWC) returns to the U.S.A. for the third time and for the second time to Sam's Town Hotel and Gambling Hall in Las Vegas (the last time being in 1999). The first BWC to be staged in the U.S.A. was held at Madison Square Garden's bowling center in Manhattan, New York, in 1981.



Anne-Marie Board

From November 13–20, one man and one woman from each participating country will compete in separate divisions for the coveted Bowling World Cup winner's trophy. According to Anne-Marie Board, QubicaAMF's tournament manager, representatives from approximately



John Sou

90 countries are expected to participate this year at Sam's Town, just short of the record 95 countries assembled at the tournaments 40th anniversary event in Singapore in 2004.

"A warm Las Vegas welcome is awaiting all our bowlers and guests this November," said John Sou, Sam's Town vice president and general manager. "We are excited to welcome back this great event."

Sam's Town will also serve as the official tournament headquarters and hotel, housing the competitors, international press journalists, guests and tournament staff.

Board remembers, "We came to Sam's Town in 1999 and the venue holds great memories for me. The facility is even better now than it was then, and many of the staff members I remember are still here. They tell me that they have been looking forward for 16 years to holding the BWC again, so I know they will be working closely with the QubicaAMF team to ensure that our bowlers and visitors have a great experience. Las Vegas is a 'must see' place and I am sure our guests will be taking full advantage of the attractions."

The successful staging of an event with the magnitude of the QubicaAMF Bowling World Cup relies heavily on a team of professionals. In addition to the management and staff at Sam's Town bowling center, Board says, "I have a terrific team that comes every year, starting with our tournament director Bernard Gibbons and assistant director Cliff Adair. This will be Bernard Gibbons' 26th consecutive year as tournament director. Bernard's wife's family hosted the very first Bowling World Cup at the Stillorgan Bowl in Dublin

Ireland in 1965. And they also hosted the 25th anniversary tournament in 1989."

Julie Howlett, who has been on the QubicaAMF team since 2001, will manage the press office. Howlett was a former participant, representing Great Britain in 1983 and 1985, when she finished in 2nd place. Dominic Gall of Talktenpin.net will be taking care of the social media needs this year. And veteran French sports journalist, Bernard Mora, will be making his 41st appearance at the tournament. Mora has covered the tournament and other sports for France and French-speaking countries, through the wire services of AFP (Agence France-Presse). The intrepid Hiroshi (Hero) Noda will once again be the man behind the lens, as the official tournament photographer.

"We are all very close and as a team are able to think on our feet," added Board, "which has made finding solutions to any challenges that come our way fairly easy to resolve."



Bernard Gibbons

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The good news for the competitors is K & K Bowling Services, operators of the Sam's Town Pro shop, will provide player-services expertise, with the latest equipment available in the marketplace today.

And last, but not least, through president Vern Vernazzaro, the Southern Nevada USBC Association will be providing a team of volunteer members to serve as lane marshalls.

One of the great things about the QubicaAMF Bowling World Cup is that no competitor goes home empty handed. Every bowler is presented with a handsome certificate of participation and a commemorative medal.

The winner's trophies are presented immediately after the finals while at the victory banquet, and awards are given for the high game in both the men's and women's divisions. Additionally there is an award for the Sportsman and Sports Woman of the tournament, as elected by their peers. The Bent Petersen Award, named after the late president of QubicaAMF's international operations, is given to the highest placed country.

Most years at the BWC the competitors go on sight-seeing tours which are usually organized by the tournament host. Ms. Board says, "There are too many options in Las Vegas, choices for shows, sight-seeing, et al, and our visitors will prefer to pick and choose accordingly. With the bowling activity being finished by 5:30 p.m. most days, there are plenty of opportunities to explore and see a show (or two). Bowlers and guests will be able to book



The 56-lane center at Sam's Town will be showcasing QubicaAMF's BES X Scoring and Management System. BES X is designed to provide exciting competitive play at any level and uniquely allows bowlers to review their game statistics on-lane, live and on-demand directly from the SuperTouch LCD bowler console.

During the tournament, through BES X, bowling fans will also be able to keep up with their favorite bowlers with live, online scoring. Bowling fans around the world can view scores in real time, see which lanes bowlers are bowling on, and their standing at any given moment. They can even stay connected to their favorite bowlers through a unique QubicaAMF Facebook and Twitter feature. The official hashtag for the event is #51BWC.

 #51BWC	
TENTATIVE TOURNAMENT SCHEDULE 13TH - 20TH NOVEMBER 2015	
FRIDAY 13th November	Arrival of Competitors Acclimatisation and Unofficial Practice Ball Control
SATURDAY 14th November	8:30 a.m. - 10:00 a.m. Ball Control 10:00 a.m. - 11:30 a.m. Official Practice - Women 11:30 a.m. - 1:00 p.m. Lane Maintenance 11:30 a.m. - 1:00 p.m. Official Practice - Men 2:00 p.m. - 3:00 p.m. Bowler's Briefing 4:00 p.m. - 5:30 p.m. OPENING CEREMONY 5:30 p.m. - 7:30 p.m. WELCOME RECEPTION
SUNDAY 15th November	7:30 a.m. - 12:30 p.m. Ball Control 12:30 p.m. - 1:45 p.m. Men First 8 Games 1:45 p.m. - 5:15 p.m. Lane Maintenance Women First 8 Games
MONDAY 16th November	7:30 a.m. - 11:00 a.m. Women Second 8 Games 11:00 a.m. - 12:15 p.m. Lane Maintenance 12:15 p.m. - 5:15 p.m. Men Second 8 Games
TUESDAY 17th November	7:30 a.m. - 12:30 p.m. Men Third 8 Games 12:30 p.m. - 1:45 p.m. Lane Maintenance Cut to Top 24 Men 1:45 p.m. - 5:15 p.m. CERTIFICATE PRESENTATION AND OFFICIAL PHOTOGRAPH - MEN Women Third 8 Games Cut to Top 24 Women CERTIFICATE PRESENTATION AND OFFICIAL PHOTOGRAPH - WOMEN
WEDNESDAY 18th November	9:00 a.m. - 11:30 a.m. Men and Women Top 24 - 8 Games 11:30 a.m. Cut to Top 8 Men and 8 Women
THURSDAY 19th November	9:00 a.m. - 12:00 p.m. Men and Women Top 8 games Round Robin with bonus points CUT TO TOP 3 MEN AND 3 WOMEN 12:30 p.m. MEN and WOMEN'S SEMI FINALS & FINALS PRESENTATION OF TROPHIES *****6:30 p.m. VICTORY BANQUET *****
FRIDAY 20th November	DEPARTURE

through a local tour operator and enjoy the most favorable rates."

For sure, the competitors, press and guests are in for a wonderful stay in Las Vegas. The activities kick off with a day devoted to the ball-check, official practice and bowlers' briefing, followed by the Grand Opening ceremony, including the colorful parade of nations, and winds up with a welcome reception. Competition starts off in earnest the next day and continues for five days, culminating in the men's and women's semi and grand finals and the winners presentation.

The last evening is a relaxed opportunity to dress up for the celebratory victory banquet, a chance for everyone to socialize, enjoy great food and dance the evening away.

Board also tells us the venue for next year's tournament will be announced at the victory banquet, which will have everyone holding their breath waiting for the announcement. We'll keep you posted. ❖



Paul Lane is former Director of Marketing and Marketing Services for AMF Bowling, Inc. He has been the director of 18 AMF World Cups, an officer in national and international trade associations, and a pro bowler during a career that spans more than 60 countries and 50 years.



BOWLING ACROSS THE POND

WHAT DOES THE BOWLING BUSINESS LOOK LIKE IN EUROPE?

■ By Paul Lane

On Oct. 10, 1909, the first bowling center opened in Europe—Regina Salonen, in Stockholm, Sweden. Another center opened in Helsinki, Finland in 1924. But apart from these centers, and the lanes installed when bowling was featured as an unofficial exhibition sport alongside the Berlin Olympics in 1936, the bowling industry in Europe really did not get started until around 1960, when today's major markets began to develop. These included the UK, France, Germany, Italy, the Netherlands and Sweden.

CLOUDY SKIES

What impact has the economic climate in recent years had on the European industry?

A negative impact in a variety of ways.

Growth in new center development and/or modernization has slowed significantly, due in part to banks being reluctant to provide the financing necessary for capital expenditure in the recreation or entertainment industries.

Consumer spending is down too, as the cost of living has increased while salaries have been dormant, not to mention high levels of unemployment in virtually every market.

In short, consumers are being more selective in where they spend their money, as expenses such as fuel, power and rent have all increased, impacting the disposable income consumers have available to spend on entertainment, recreation, and other leisure activities.

In most markets a number of centers have been forced to close, due in part to increased operating costs, especially in taxes, leases and, just as for consumers, in the cost of utilities.

However, it's not only the economic climate that has impacted the industry negatively. For example, Denmark had a huge growth in the 1990s: in 1990 there were 14 centers and by 2000, there were 114. But many of the new centers were built in areas with populations that were too small to provide adequate revenues for the centers to be viable, forcing a number of them to close. All told, Denmark has seen about 10% of its centers close, offset partially by an increase of about 4% in new centers in areas that are more populous.

Markets such as The Netherlands, Belgium, Sweden, Germany, Switzerland, Austria, France and the UK, all report a decrease in the number of sport or traditional bowling centers. The centers have not necessarily closed; many upgraded and converted to BECs or FECs.

Other centers have been the victims of unsustainable increases in lease terms when time came for renewal, especially when landlords have seen opportunities to lease the space to developers of alternative commercial properties at a much higher price.

SILVER LINING

But this is not the first time that the European market has been affected by a recession and, while there have been some casualties, most proprietors have weathered the storm and have come out the other end with a new business model that ensures a return to profitability.

The decrease in number of centers has been mostly among older and more traditional bowling centers that offer little more than bowling. Centers that have switched their focus toward a BEC or FEC have been more likely to survive.

Notably, boutique facilities are gaining visibility across Europe, growing rapidly in markets such as the UK, Finland, Germany, Sweden and Russia. They typically

continued on page 32...

COVER STORY

...continued from page 29

combine a few lanes—often between four and eight—sometimes with string machines and over-lane ball returns, along with other amenities on the pattern of up-scaled bowling centers in the U.S., such as higher-end food and beverage services, intelligent LED design with a small dance floor, billiards, pool, darts, table tennis, and a sports bar. Boutique centers are proving to be a perfect fit for smaller communities that otherwise could not support a more traditional center or FEC.

Europe boasts a number of large centers with 24 to 32 lanes, but the average center size is closer to boutique facilities and averages 11 lanes. Austria and the UK top the list with an average of 16 lanes per center. The average in France is 14, while Denmark, Finland Sweden and Turkey each have an average of 10 lanes per center. Russia, with 5,300 lanes in 640 centers, averages a little over 8 lanes, while Germany, which heads the list of number of centers (730) and lanes (8956), averages 12 lanes.

Where most of these smaller centers were once profitable with bowling alone, many are now supplementing their incomes by adding new revenue-generating amenities to their facilities, with many adopting more of an FEC or up-scale, boutique business model, which many see as the future for the industry in Europe.

In technology and amenities, our research revealed that of the 3,759 centers in 19 of the European countries used for this report, 99.9% have automatic scoring, 74% have bumper bowling, 71% have intelligent LED light and sound design, 12% have full-service pro shops, 25% have arcades, 50% have full-service restaurants, and 23% have a sports bar.

With the exception of automatic scoring, the notable changes over the last 10 to 15 years have been the introduction of light and sound technology and sports bars. The small percentage of centers with full-service pro shops is consistent with the decline in sport bowling centers and membership in the various bowling federations.

All these changes are surrounded by consumer prices showing a wider range than markets in other parts of the world, notably the U.S. On the lower end of the scale, in those countries that sell bowling by the game, open play in Belgium and The Netherlands averages about \$3.80 per game (all prices in U.S. dollars). Sweden has the lowest price, at \$2.40. At the high end, the UK tops the list at \$9.30 per game, followed by France at \$6.85.

Most European countries sell bowling by the hour, where again we found a huge variance in hourly charges, even within markets. For example the hourly fee for open play, including party bowling, in Russia ranges from \$13 to \$30 an hour in big cities such as Moscow, St. Petersburg, or Ekaterinburg, whereas a range of \$6 to \$16 an hour is more

European Market Study Data

COUNTRY	# CENTERS	# LANES
Austria	105	1680
Azerbaijan	20	200
Belarus	25	165
Belgium	125	1400
Czech Republic	18	202
Denmark	105	1100
Finland	135	1400
France	385	5400
Germany	730	8956
Greece	47	400
Italy	150	1500
Moldova	5	46
Norway	98	902
Netherlands	265	2000
Poland	116	758
Russia	640	5300
Spain	110	990
Sweden	254	2500
Switzerland	54	620
Turkey	275	3300
UK	330	5200
Ukraine	80	560

typical outside metropolitan areas.

The highest price in most markets appears to be for the hourly rate for party bowling, which is in the range of \$25 to \$35, although in some cases this price may include food (a light snack) and/or a beverage.

BETTER WEATHER

In short, Europe is streamlining its businesses to reduce operating costs and is adding new amenities and sources of revenue to offset the downturn in bowling revenues.

And the changes are varied to suit the needs of the local market. Europe's proprietors understand that what works in Sweden and Denmark may not be successful in France or Belgium or The Netherlands, even though they all start off with similar issues and problems.

The result: observers are seeing modest but steady growth across many parts of Europe. For the near future, all of the mature markets are forecasting growth in terms of new construction and modernization of existing facilities







Regarding the European market, the trends in bowling have fallen in with what we experience here in the U.S. The business has evolved nicely from mostly traditional-style centers to a variety of the new business models. FECs or BECs are popular in countries like Russia (led by the chain Cosmik), and in the UK (led by Namco), as well as France, Belgium and The Netherlands. Some of the world's best boutique-style centers can also be found across Europe, especially in countries such as Finland and Germany. In addition, the strength of the new business models is evident with the growth of chains like Bowling World in Germany, Namco in the UK, the O'Leary's franchise in Sweden and even Brooklyn Bowl in London.

Gary Smith
*Vice President of International Sales,
Brunswick Bowling Products*

over the next five to 10 years.

More importantly for the long run, the changes European proprietors have made to adapt and survive the recession have made them wiser and better business owners. And when the dust finally settles, the bowling industry in Europe will be strong and continue to grow.

PARTLY SUNNY SKIES

RUSSIA

One interesting European market is **Russia**, which has quietly developed into a major market with about 640 centers housing

some 5,300 lanes. The first centers in Russia opened in Moscow in mid-1970, including Kosmos Bowling and a four-lane center in a foreign ministry guest house.

However, the commercial bowling industry in Russia really only started to develop in the late '90s, with Bowling Center Alex in 1997 (now closed). This market has since experienced two economic crises, which, in the short term, stagnated growth in the industry, especially in 2014 when revenues decreased in most bowling centers.

Ten years ago a number of stand-alone sport centers were built in Russia. Today almost none is being built, instead succeeded by boutique bowling facilities or FECs that incorporate bowling. Almost all closures have been traditional centers that offer nothing but bowling.

TURKEY

When we think of similarities and differences between European markets, one country that stands out is Turkey, where the first center opened in 1989. By 2009 there were 200 centers and today there are 275, with almost 200 of those centers having opened in the last 10 years.

According to Alain Winterhalter, CEO of Switch Bowling, Turkey experienced remarkable growth from 2007 to 2012, despite the economic slowdown and a 4% drop in GDP in the past couple of years. Investment in new developments has proven beneficial to the bowling industry there.

What sets Turkey apart from most other markets is that the majority of centers are located in shopping malls. There are currently 341 functioning shopping malls in Turkey and another



A great deal will depend on the Olympic question as far as the sport is concerned. The need to raise the competitive profile and adapt to the modern, changing environment of competitive play is important to the future of the sport. The balance between sport and recreational use has been upset by the need for the "faster buck." In the UK, the most successful centers are still those that hold the balance right, which also happen to be the oldest centers.

The new 'boutiques' certainly have a role within the hierarchy of provision, often introducing the new, smaller bowling center to towns that didn't have the numbers to support a 'traditional' center.

Nick Keppe
President, Bowltech UK Limited



The global bowling industry has been in a decline for a number of years, but nowhere was it felt harder than in Europe. However, starting about two years ago, we began to see positive signs of growth that have continued. We're finding that growth is more pronounced across centers and chains that invested in their businesses during the downturn by modernizing and adding new entertainment features, such as BES X, new attractions or VIP lounges. New facilities in Europe are embracing this trend with the entertainment center concept as well. These new and modernized facilities are able to target a wider range of consumers, provide a more upscale menu offering, and give consumers a reason to visit more frequently and stay longer.

Juan Cabezas
*President and Chief Growth Officer,
QubicaAMF Worldwide*

74 are under construction. The bowling market in Turkey is directly linked to the growth in shopping malls. However, more residential projects and hotels are including bowling and FECs in their planning.

SWEDEN

Another market that has experienced a significant change in the last decade is **Sweden**, one of the markets that developed

rapidly since its start in about 1959. It's a market that has enjoyed steady growth.

During its first two or three decades, the industry was divided between commercial and community centers—the latter being centers mostly in small communities that were owned and operated by the local town councils or governments. Both the commercial and community centers were small—average size between 4 and 10 lanes—and were

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COVER STORY

pretty bare-bones. They were sport bowling centers with no frills. But they were perfect for the time, when most organized bowling was through clubs. Customers belonged to, and bowled with or for, their club. That has changed as centers have expanded their food and beverage offerings, added light and sound technology and, apart from the newer and larger centers which follow the model of FECs, these older, smaller centers are a closer fit to what we call boutique centers today.

At least 25% of the older sports centers have added alternative sources of revenue like shuffleboard, laser tag, simulators and more extensive food and beverage services. Only 2% of centers have closed, typically because of financial difficulties, escalating health and safety costs, and a decrease in sport bowling. Sweden remains, however, a stable market and with growth potential with a projected increase of at least 10 new centers in the next five to 10 years.

FRANCE

In **France**, one of the first bowling centers was Bowling De Paris, located in the Bois de Boulogne, a large public park located on the western edge of the fashionable 16th arrondissement of Paris.

Bowling de Paris, like so many of the early centers in France, could best be described as a gourmet restaurant with bowling lanes, a trend that continued for several years before more traditional centers were built, and more recently FECs.

Today, some 50-plus years later, there are over 400 centers in France, where the market, just like the rest of Europe, has been affected by economic conditions. However, consumers in France want to have everything when they want it and where they want it, and they want more fun and living experience. The concept of an FEC or a boutique facility with a restaurant and kid activities, are the future of bowling in France—venues that fit the demands of families, parents, kids, teens, corporate and private groups, and people who just want to enjoy a variety of entertainment and recreation experiences in a single location.

The trend in France has been to build 10 to 15 new centers a year. It's a trend that's likely to continue, mostly with FECs and modernization designed to fit today's demand for facilities with a wider spectrum of recreation and entertainment amenities.

It's been a rough economic storm for Europe, but the rays of business sunshine are peeking through. The take-away is: in order to survive, bowling businesses must reinvest and reinvent themselves.



The economy has had a negative impact on the European bowling marketplace in two ways: growth has slowed in terms of investment in new centers and modernization, and proprietors have seen a downturn in terms of their customer base.

However, the few new businesses and proprietors that have invested or reinvested in their businesses, are already seeing a favorable return. And, perhaps more important, these proprietors will become role models for the future as they focus on providing a lounge atmosphere to their facilities with more focus on entertainment, including exciting light architecture, that will further enhance the customer experience.

Bowling has proven to be an evergreen business, a business that, in the long term, will always be there before, during and after any economic downturn. And the future for the industry in Europe, as it recovers from the current economic climate, will be stronger than ever, with the new breed of upscale boutique-style facilities leading the way.

Hans Krol
CEO, Bowltech Group

We wish to thank the following for their assistance in this report: Gary Smith, vice president international sales, Brunswick Bowling Products, and the company's network of distributors in Europe; Stephanie Darby, marketing director, QubicaAMF Worldwide, and the company's sales offices in Europe; Hans Krol, CEO, Bowltech Group, and the team at Bowltech International; Nick Keppe, President, Bowltech UK; Jouni Helminen, Sport Bowling Finland; and Alain Winterhalter, CEO, Switch International Bowling Ekipmanlari AS, Turkey. ❖



Paul Lane is former Director of Marketing and Marketing Services for AMF Bowling, Inc. He has been the director of 18 AMF World Cups, an officer in national and international trade associations, and a pro bowler during a career that spans more than 60 countries and 50 years.



51st QUBICAAMF BOWLING WORLD CUP SAM'S TOWN LAS VEGAS 2015

NOVEMBER 13 - 20, 2015

Stay up-to-date and follow all of this year's tournament action, LIVE—on Facebook, Twitter, the official QubicaAMF website, with Live Streaming or Live On-Line Scoring—the choice is yours. And be sure to share this with your friends and family back home so they can stay up-to-date too!



Live Streaming is Back!

Follow the entire Bowling World Cup event LIVE on BowTV @ <http://www.youtube.com/user/BowTV>. We'll cover a pair of lanes showcasing all bowlers as they move across the lanes and have live commentary throughout the tournament—including interviews with bowlers and coaches. Or go to the 51st Bowling World Cup Playlist by scanning the QR code.



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Keep up with your favorite bowler's scores live, on-line. See where they are bowling and their standing at any given moment.



Official Bowling World Cup Website

Visit the official site of the 51st Bowling World Cup for full tournament details, to access the latest press releases, Media Kit, Magazine, results, On-Line Scoring or link to Live Streaming. Go to www.qubicaamf.com and click on the red Bowling World Cup 2015 button on the top of the page, or go directly to <http://www.qubicaamf.com/World-Cup/Las-Vegas-United-States.aspx>



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*Good luck and good bowling to everyone!
See you in Las Vegas.*

#51BWC

The winners of the 50th QubicaAMF Bowling World Cup!

