

Tenpin Bowling - UK - July 2010

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What is this report about?

Bowling retains wide popularity as an occasional leisure activity but is a mature sector with lack of competition between brands, high market entry costs and little prospect of significant new supply growth. Creating incentives for more frequent visits and driving up per capita spend by getting the product mix right for different customer segments are the priorities in the years ahead.

This report provides an overview of the tenpin bowling market, investigating the core market factors, strengths and weaknesses, supply structure, consumer dynamics and likely future developments.

What have we found out?

- Following a period of sustained growth of 2-3% per annum, the value of the tenpin bowling market fell by 11% between 2007 and 2009 to just under £250 million. In the first half of 2010 volumes have picked up and spend is ahead of last year, but still lags behind pre-recessionary levels.
- Corporate group bookings – a high-margin segment with the highest ancillary spend per head – have declined during the recession. Birthday party packages have been least affected.
- ABs and families with older children are more likely to buy snacks than a hot meal, whereas the lower socio-economic groups and those with children aged 5-9 are more likely to buy a full meal than a snack. Centres could increase food and drink revenues from the most affluent consumers with a more upmarket food and drink proposition.
- Three in ten consumers would be attracted by more adults-only bowling nights and a quarter of those surveyed think that bowling alleys are currently too child/family-oriented. Four in ten under-35s like the idea of bowling in other leisure venues such as pubs.
- There is a lack of distinct brand identity, product differentiation and local competition between centres, with four in ten bowlers unable to recall which bowling chains they have been to.
- Only 4% of those surveyed have visited boutique bowling centres such as All Star Lanes but Mintel's survey shows a quarter of people would like to see 1950s/1960s-style retro themes and cocktail/wine bar facilities, while a fifth would like to see more upmarket or gourmet food in bowling centres.

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