

Brighton i360 Hub Proposal

Industry Context

The visitor attractions sector was hit hard by the covid pandemic. In 2020, National Museums (England) posted a downturn of 77% relative to 2019, and ALVA (Association of Leading Visitor Attractions) posted a downturn of 71%. By 2022, visitors had still not returned to pre-pandemic levels, and NM posted a downturn of 54% relative to 2019. ALVA has not yet released 2022 figures, but visitors were still 61% down in 2021.

The Brighton i360 has performed relatively well in this context. Visitors were down by 63% in 2020 relative to 2019, but were only 16% down in 2022.

The cost-of-living crisis has contributed to the ongoing downturn in visitors, as has changing consumer behaviour. Older visitors in particular are more cautious than before the pandemic and are now less likely to visit attractions. This has particularly affected more established attractions that largely rely on this demographic. Some industry experts believe that this trend will prove permanent.

However, there has been a parallel trend: new types of visitor attractions and immersive experiences aimed at a younger audience have been doing well in the post-pandemic context. These include projections, Instagram museums, immersive theatrical experiences, games bars, new ways of delivering live music events, and new food and beverage formats.

Response to a Changing Market

The original West Pier began primarily as a promenade, and then adapted and expanded the uses it offered its visitors over the course of its long lifespan.

The i360 opened in August 2016 as an observation tower supported by ancillary event spaces, restaurant, retail, and exhibition.

In response to the changing market, the i360 is proposing to do the same as the old West Pier. We are proposing to create a 21st century beachside entertainment hub by bringing new uses to the site ancillary to the main observation attraction. New uses will reflect new trends, be complementary to each other, and draw different audience segments to the site, increasing overall footfall and revenue.

The i360 has already started this process with an expanded evening Skybar offer due to launch soon, and the Walk 360 experience, which enables visitors to walk on top of the glass pod while attached to a safety harness. The first phase of this has been launched already, enabling the experience to run while the pod is not in normal operation. The experience is currently being developed and upgraded

to allow visitors to do this while the pod is moving, which will allow a much greater volume of visitors access to the experience.



Among the possible ancillary uses currently being explored are:

Secondary Attraction

New attractions such as Instagram museums and illusion museums have significantly grown in popularity in the post pandemic market. It may be possible to integrate such a concept into the i360 building alongside the main attraction.

Games Bar with Food

There has been a significant trend in recent years of games-led bar and food concepts including mini golf, darts, shuffleboard, ping pong, and retro arcade machines. This is combined with a simple hot food offer such as burgers or pizza, or else street food. The audience includes families in the daytime, switching to adults and corporate group bookings in the evenings. Such a concept could

work well on the i360 site, drawing a new audience and providing increased access to the evening economy.

Street Food & Events

Traditional casual dining F&B offers are struggling in the current market context, while event-led street food offers are doing well. There is an opportunity to host an event-led street food offer on the i360's external terraces, which have excellent footfall and views.

Immersive Experiences

Immersive experiences that mix theatre and F&B are doing well across the UK, and Brighton is one of the most popular cities in which to open a new site. There is potentially an opportunity to host one or more of these experiences on the i360 site.

Outdoor Games & Events

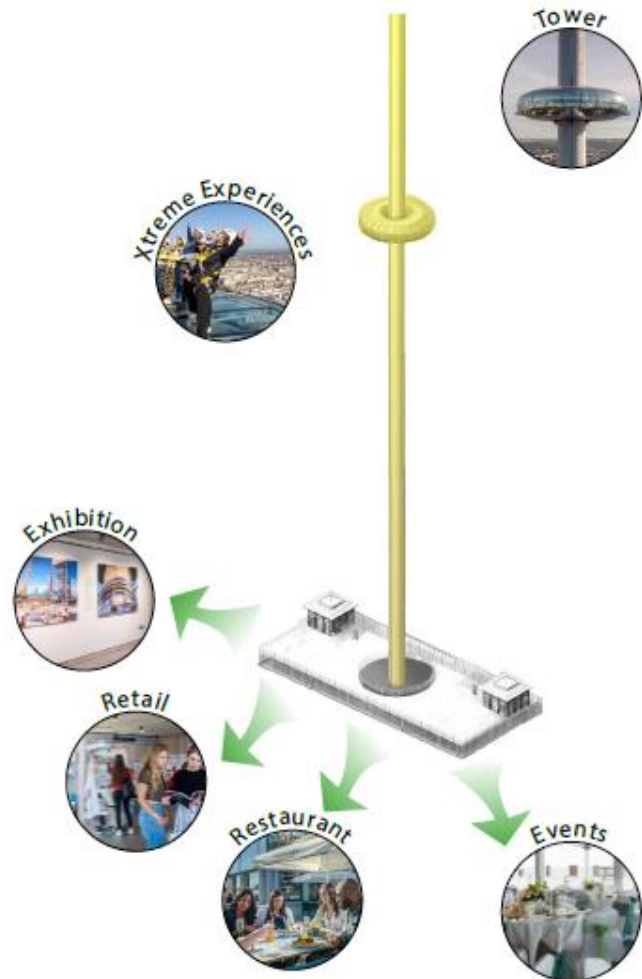
Outdoor games and events such as mini-golf and rollerdisco have become increasingly popular in recent years, and there is an opportunity to host one or more of these on the i360's upper or lower terrace.

Virtual Reality

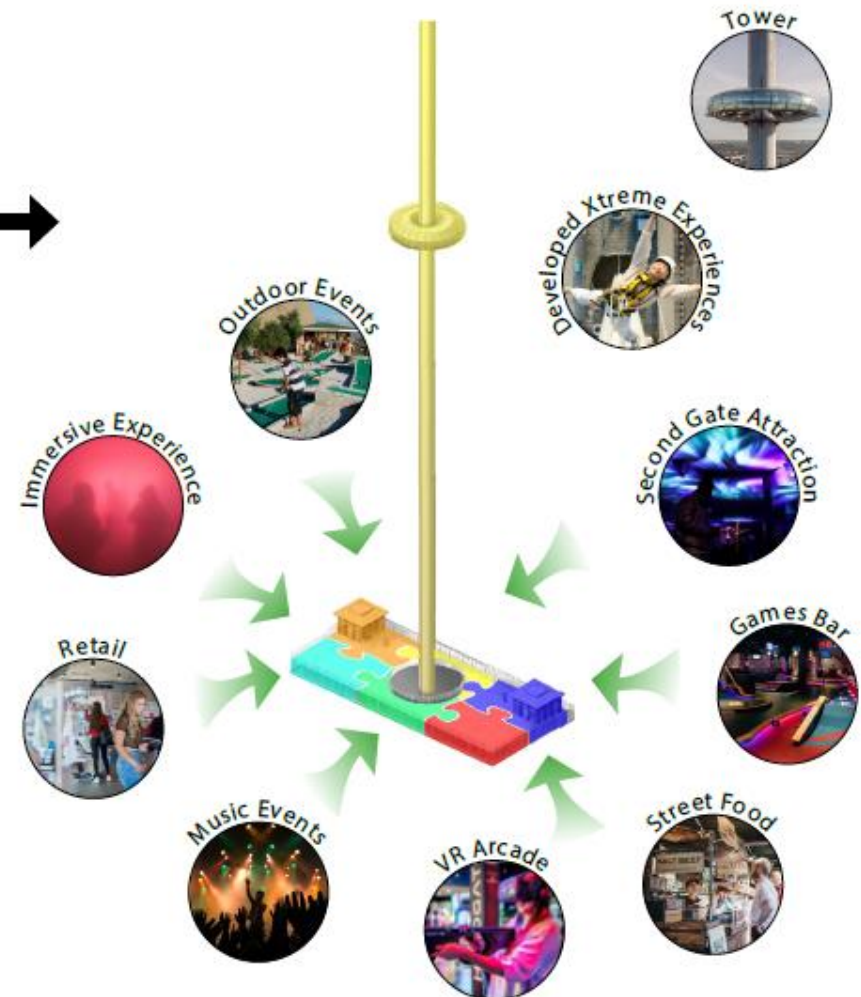
Numerous new VR experiences have been launched in the UK in the past few years. There is a wide range of formats, some of which may be possible to integrate into our site.

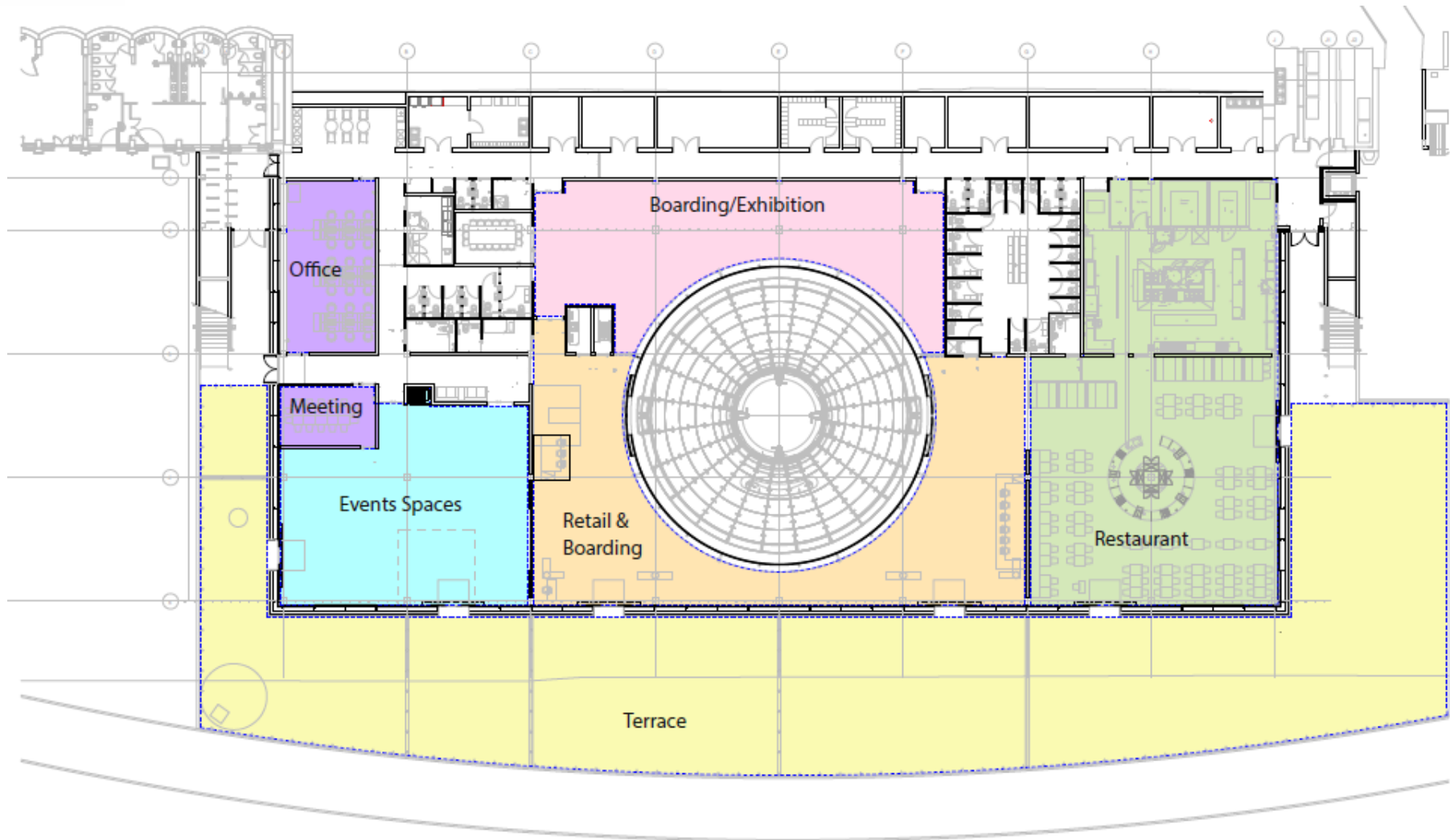
Not all of these ideas will prove viable in the space available, and some that are will take time to finalise and install. So Brighton i360 is initially looking to launch one or more of these in summer 2023 in order to drive additional footfall and revenues this year. Subsequently, further ancillary uses will be explored.







Stand-alone Attraction



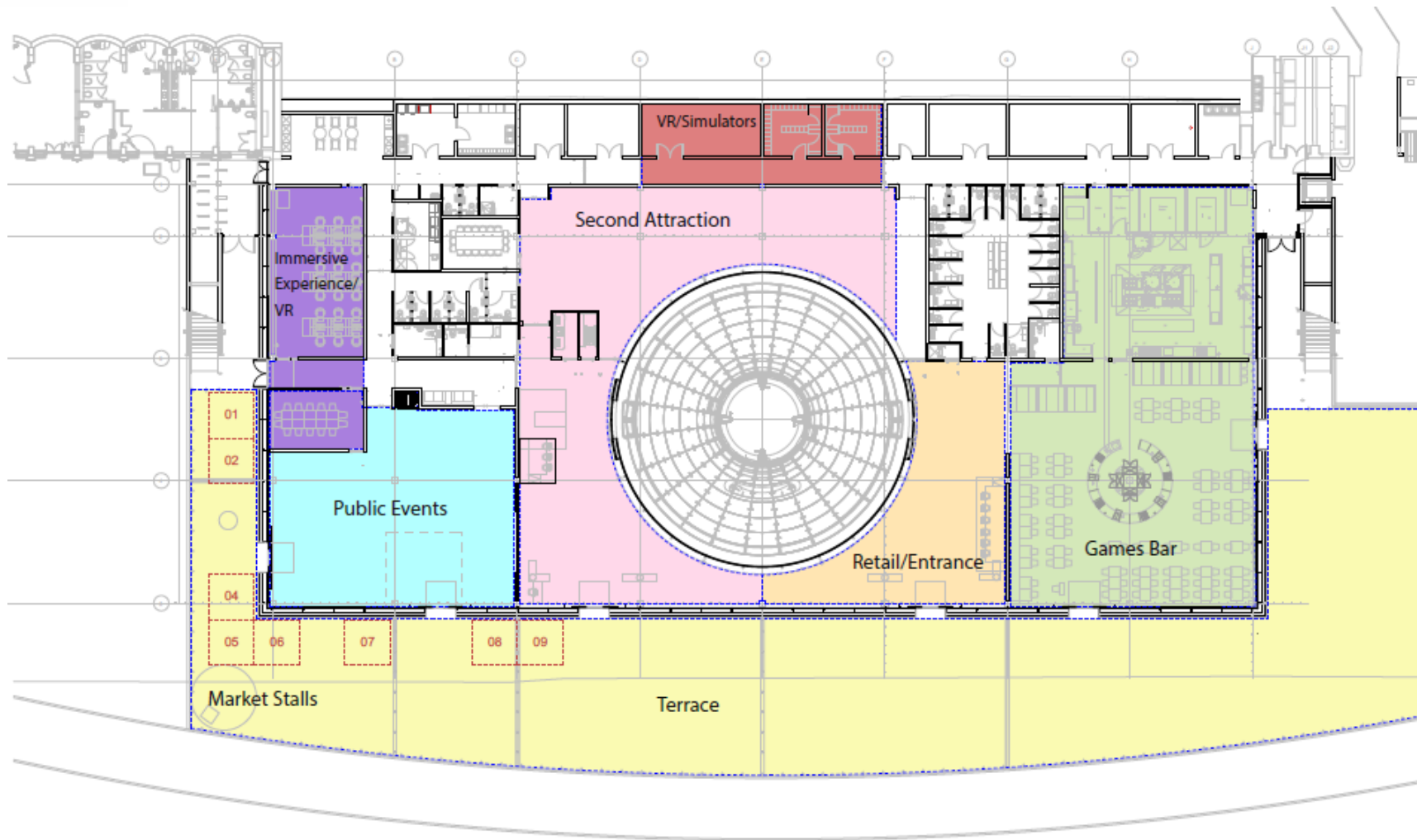
21st Century Entertainment Hub













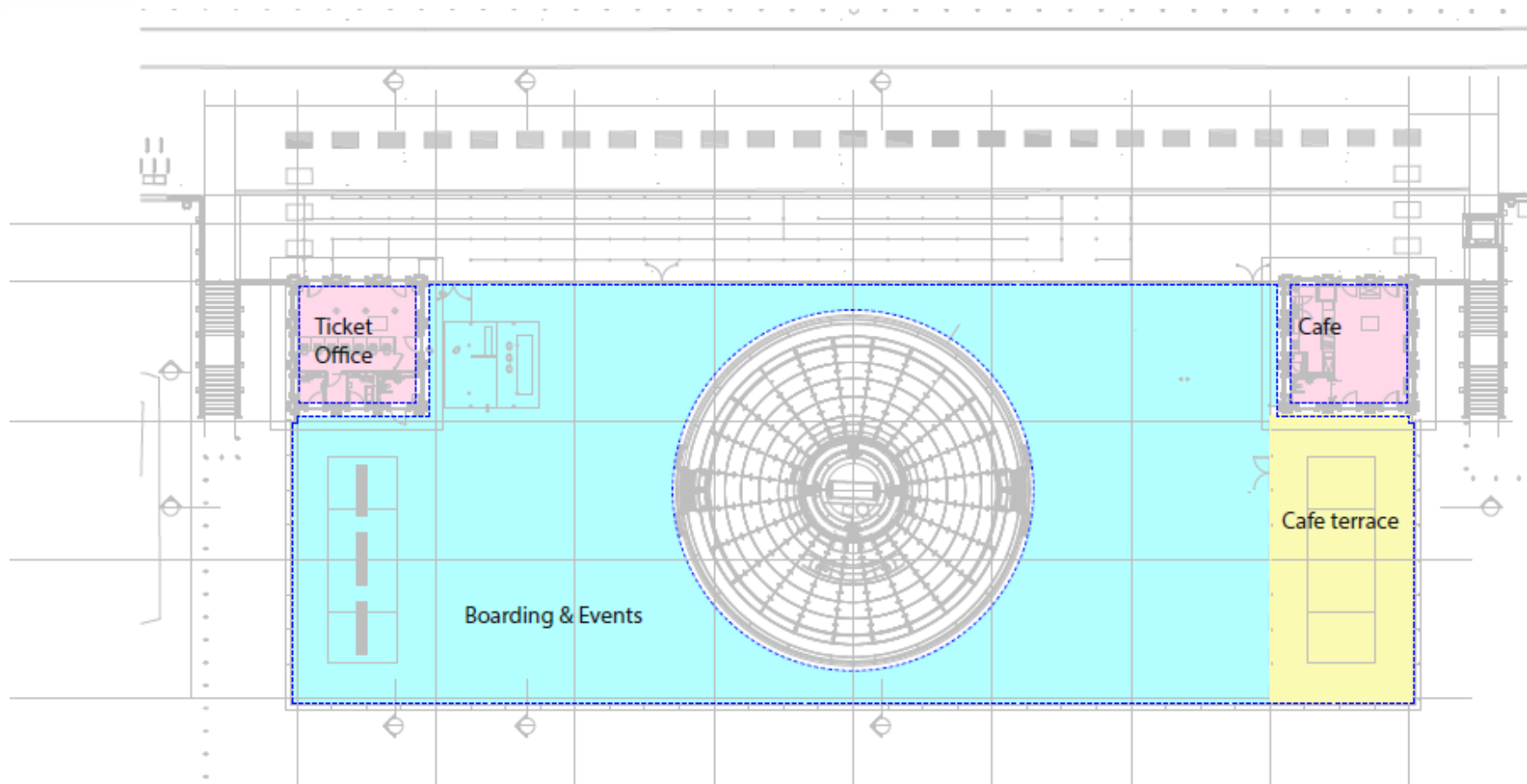
 Events Spaces - 194sqm	 Terrace - 950sqm	 Office & Meeting - 91sqm
 Boarding/Exhibition - 198sqm	 Restaurant - 407sqm	 Retail & Boarding - 283sqm




Ground Floor Existing
Space Usage



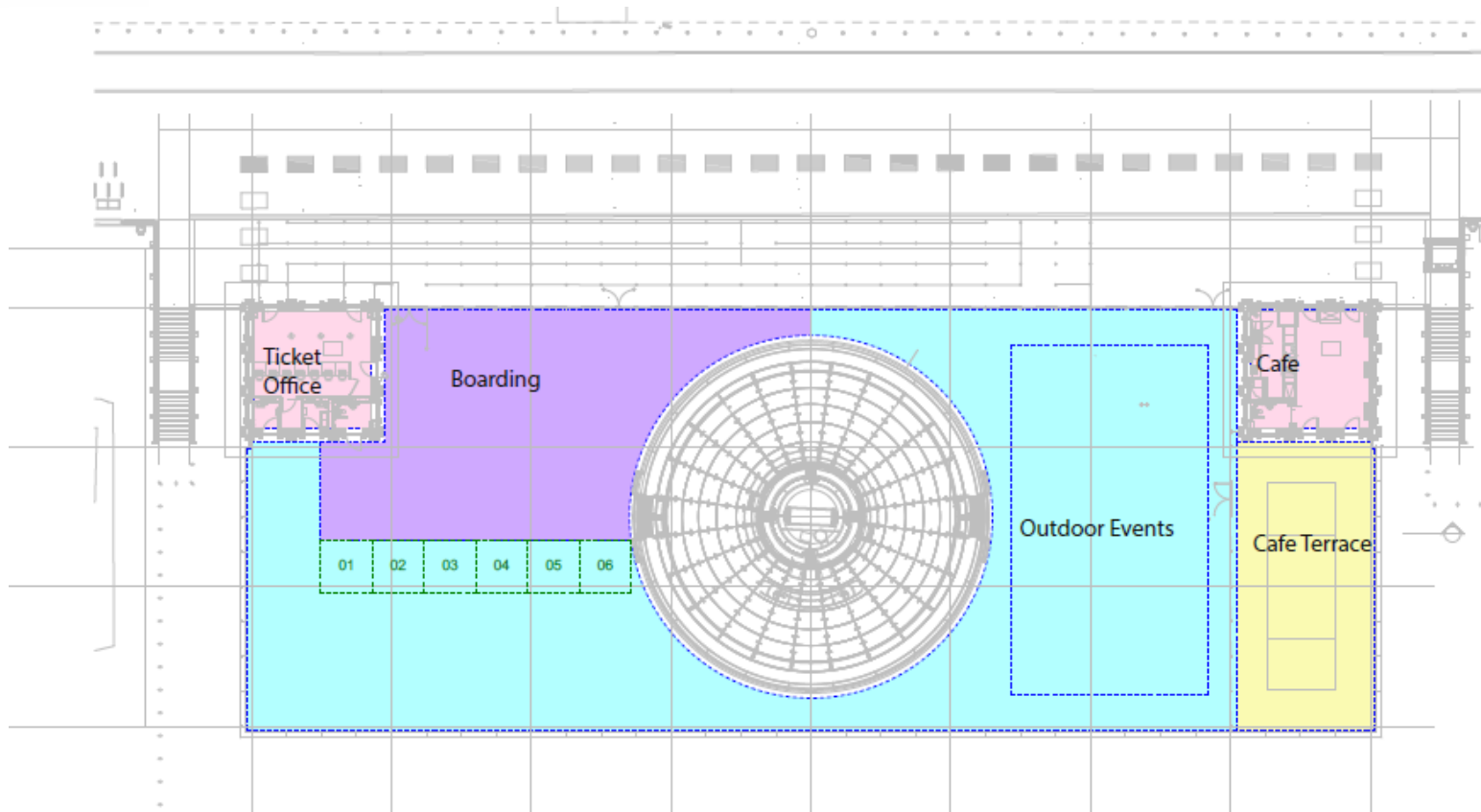
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|  | Market Stalls |  | Public Events - 193sqm |  | Terrace - 950sqm |  | VR/Simulators - 85sqm |
|  | Retail/Entrance |  | Second Attraction - 330sqm |  | Games Bar - 406sqm |  | Immersive Experience/VR - 107sqm |






Ground Floor Proposed 8th February 2023
Indicative, Superseded



-  Boarding & Events - 985sqm
-  Toll booths - 94sqm
-  Cafe terrace - 139sqm

Upper Floor Existing
Space Usage



- | | | |
|---|--|---|
|  Outdoor Events - 741sqm |  Cafe Terrace - 133sqm |  Stall Pitches |
|  Toll Booths - 94sqm |  Boarding - 251sqm | |

Upper Floor Proposed 8th February 2023
Indicative, Superseded