



# Weekly Management Report

## February 22, 2019

- 1. Synopsis** Art in Public Places Meeting on February 4, 2019  
**Parks and Recreation Department**
- 2. Report** 2017 Burbank Tourism Impact Report  
**Community Development Department**
- 3. Synopsis** Parks and Recreation Board Meeting on  
February 14, 2019  
**Parks and Recreation Department**



CITY OF BURBANK  
**PARKS AND RECREATION**  
**ANNOTATED AGENDA/MEETING SUMMARY**

**Meeting:** *Art in Public Places*      **Date:** *2-4-19*

**Members Present:**    Gordon Haines, Dink O’Neal, Kat Olson, Lara Saikali, Diane Eaton, Teri O’Connor

**Members Absent:**     Carolyn Jackson

**Staff Present:**        Marisa Garcia – Assistant Parks and Recreation Director, Paula Ohan – Administrative Analyst, Daniel Amaya – Recording Secretary, Megan Anghel – Management Intern

**Council Liaison Present:** *none*

Item Discussed	Summary	Direction or Action, if any
1 PUBLIC ART FUND – ART IN PUBLIC PLACES COMMITTEE POLICY UPDATE	Ms. Ohan discussed the Art in Public Places Committee Policies, Procedures and Evaluation Criteria adopted by City Council September 1998. She advised the policy addresses that \$20,000 from the Public Art Fund be set aside for maintenance of public art pieces, noting the City is responsible for maintenance. Ms. Garcia recommended the Committee update this policy and the maintenance dollar amount for the 39 City owned art pieces. The total estimated valuation of these art pieces is just under \$2 million. Members discussed the idea of having the art pieces appraised by a certified appraiser to best reflect the current art value. Members agreed that after the appraisal, they can determine a feasible set-aside amount for maintenance.	Motion made by Mr. Haines, seconded by Ms. Olson and carried (6-0) requesting Staff to provide the Committee a list of the City-owned public art funded art pieces, its condition and maintenance history.  Members requested insurance specifications under the City’s policy. Members also requested Staff to provide a quote on a potential future appraisal for the art pieces.

2	CURRENT AND FUTURE PUBLIC ART PROJECTS	<p>Ms. Ohan provided updates and advised the Committee of the four projects staff is currently working on: McCambridge gym mural, Wood Carving Project, Central Library Functional Art project, and the Verdugo Aquatic Facility Public Art project. Members raised questions and requested a representative from the Committee to serve as a member on the site specific sub-committee for the Verdugo Aquatic project. The Committee suggested staff continue to move forward with all four projects. Members also discussed ideas for future potential art projects, such as incorporating a new shade structure/gazebo at parks and/or functional art pieces including a musical element.</p>	<p>Motion made by Mr. O'Neal, seconded by Mr. Haines and carried (6-0) to select Ms. Saikali as the Art in Public Places representative for the Verdugo Aquatic Facility Public Art project.</p> <p>Members requested staff to provide the Committee with estimates on a potential shade structure art project, and a potential pebble chime art project.</p>
3	2019 MEETING CALENDAR	<p>Staff provided the Committee with the proposed 2019 meeting calendar to review and accept.</p>	<p>Motion made by Mr. O'Neal, seconded by Ms. O'Connor and carried (6-0) to approve the 2019 meeting calendar.</p>
4	"THE HATS" AT LINCOLN PARK FINAL UPDATE	<p>Ms. Ohan informed the Committee that "The Hats" at Lincoln Park have been installed and completed including identification plaques. Ms. Ohan also advised the Committee that per direction from the City Manager's office, the City will be installing bronze informational plaques costing approximately \$800 each. The Committee was not in favor of the idea and provided other potential suggestions on how the information can be displayed.</p>	<p>None.</p>



C: City Council  
Executive Staff



# memorandum

**DATE:** February 13, 2019

**TO:** Ron Davis, City Manager

**FROM:** Patrick Prescott, Community Development Director *DLK FOR PP*  
Via: Simone McFarland, Asst. Community Development Director Business and Economic Development  
By: Mary Hamzoian, Economic Development Manager *MHP.*

**SUBJECT: 2017 Burbank Tourism Impact Report**

In 2018, the City's Economic Development Department hired *Tourism Economics* to conduct research and develop a report on the economic impact of tourism for the City of Burbank. Visitors represent an integral part of Burbank's economy, generating substantial tax revenues in Transient Occupancy Tax, Transient Parking Tax, and Sales Tax. The tourism sector also supports 8,700 jobs in Burbank.

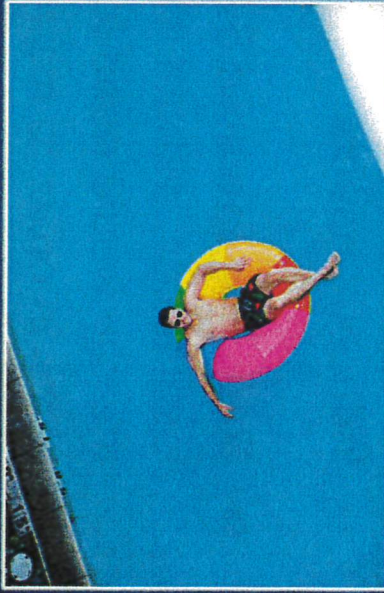
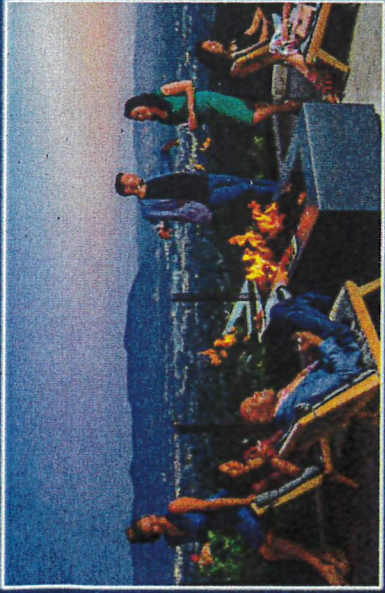
By monitoring the visitor economy, staff and City Council can make informed decisions regarding the funding and prioritization of tourism development in Burbank. Economic impact analysis measures the visitor economy year over year comparing tax generation, employment, wages, and spending.

Since the last Tourism Impact Report from 2015, the visitor economy in Burbank has shown significant growth in the number of visitors, sales, employment, and tax revenue. The results of these increases are reflected in the highlights of the 2017 Tourism Impact Report results:

- More than 3.4 million visitors spent \$829.3 million in 2017, increases of 4.1% and 6.6% respectively from 2016;
- Tourism in Burbank generated \$154 million in tax revenues in 2017, including \$34.5 million in state taxes and \$36.7 million in local revenues;
- Tourism driven state and local taxes of \$71.2 million helped offset the tax burden on city households; without tourism generated tax revenue households would have to pay \$1,428 more to sustain the same level of public services.
- Including direct and indirect impacts, 8,703 jobs were sustained by visitors to Burbank in 2017;
- Approximately 3.9% (1 in 25) of all jobs in Burbank were sustained by tourists, with an estimated 35% of tourism-supported jobs in recreation, 24% in food and beverage, and 10% each in retail and lodging.

**Exhibit A:** 2017 Burbank Tourism Impact Report

CITY OF SIOUX FALLS  
SIOUX FALLS, S.D. 57104  
19 FEB 19 P3:45



# The Economic Impact of Tourism in Burbank, California

2017 Analysis  
December 2018



Prepared for:  
The City of Burbank



TOURISM  
ECONOMICS  
AN OXFORD ECONOMICS COMPANY



# Executive summary

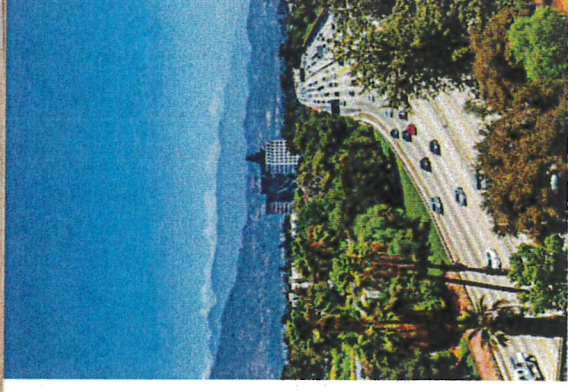
- Visitor volume and spending in Burbank expanded 4.1% and 6.6%, respectively, in 2017 from a year earlier.
- Visitors to Burbank spent a total of \$829 million, generating total business sales of \$1.0 billion in the City, including indirect and induced impacts.
- Tourism generated \$71.3 million in state and local taxes, without which each household in the city would need to pay \$1,428 more in taxes in order to maintain public services.
- A total of 8,703 jobs, 3.9% of the total, were supported in Burbank, with total income of \$367.4 million in 2017.



# Destination: Burbank

---

- Visit Burbank, the official destination marketing organization for the City of Burbank, retained Tourism Economics to measure the economic impact of the tourism industry in the City in 2017, updating a previous analysis completed for 2015.
- Burbank has a hotel room inventory of nearly 2,600 rooms in 18 hotels, and 2.4 million passengers arrive through Hollywood Burbank Airport in 2017.
- Burbank is dubbed the “Media capital of the world” as home to Warner Brothers Studio Tour Hollywood, and 1,000 other entertainment-related companies, and the city offers easy access to nearby Hollywood.



# Introduction and definitions

---

- This study measures the economic impact of tourism in the City of Burbank, California in 2017.
- Visitors are defined as travelers who stayed in overnight accommodations, or day travelers who came from at least 50 miles and whose trip deviated from their normal routine.
- The impact of tourism includes direct spending, indirect (supply-chain) effects, and induced (income) effects.
- Impacts are measured in terms of employment, income, gross output (business sales), and tax revenues.



# Headline Results

---



TOURISM  
ECONOMICS

AN OXFORD ECONOMICS COMPANY

# Headline results

---

- The visitor economy in Burbank is expanding and generating business sales, employment, income, and tax revenues.
- Visitors to Burbank spent \$829.3 million in 2017, which generated \$1.1 billion in total business sales, including indirect and induced impacts.
- Tourism in Burbank generated \$154 million in tax revenues in 2017, including \$71 million in state and local revenues.



# Headline results

---



- Including direct and indirect impacts, 8,703 jobs were sustained by visitors to Burbank in 2017 with total income of \$367 million.
- Approximately 3.9% (1 in 25) of all jobs in Burbank were sustained by tourism.
- An estimated 35% of tourism-supported jobs are in recreation, 24% in food and beverage, and 10% each in retail and lodging.

# Key Themes for 2017

---



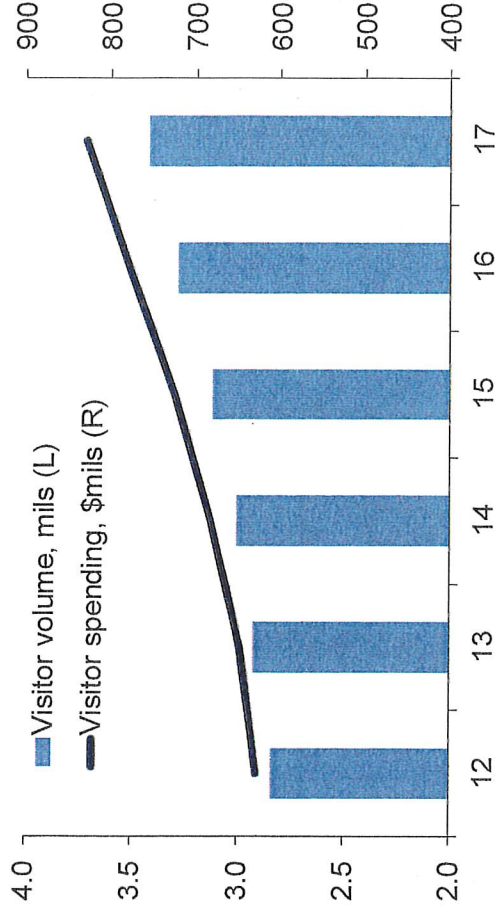
TOURISM  
ECONOMICS

AN OXFORD ECONOMICS COMPANY

# Key themes for 2017

- Visitor volume and spending in Burbank expanded in 2017.
- Burbank tourism is primarily regional, and relatively strong income growth in California has boosted visitation.
- Just over 3.4 million visitors spent a total of \$829.3 million in 2017, increases of 4.1% and 6.6% respectively, from 2016.

**Burbank Visitor Volume and Spending**



Source: Tourism Economics

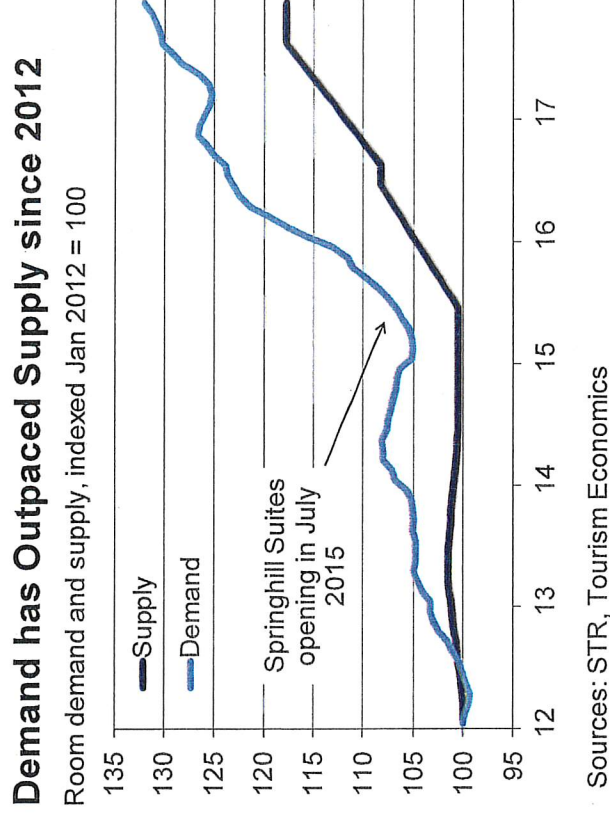
## Burbank Visitor Volume and Spending

	2013	2014	2015	2016	2017
Visitor volume (thousands)	2,927.1	3,009.6	3,121.8	3,287.0	3,422.3
% change	3.2	2.8	3.7	5.3	4.1
Visitor spending (\$millions)	647.5	682.4	724.8	777.6	829.3
% change	3.1	5.4	6.2	7.3	6.6



# Key themes for 2017

- The Porter Ranch gas leak impacted the hotel sector, boosting demand in 2016, but slowing growth in 2017. These distortions have been accounted for in the estimates of visitor volume and spending.
- Room demand in 2017 was 28.0% greater on average than in 2012, versus 16.4% for supply.
- Supply is catching up, and in 2017 supply expanded 5.7% versus 4.5% growth in room demand. The occupancy rate ticked down to 82.8% from 83.8% a year earlier.

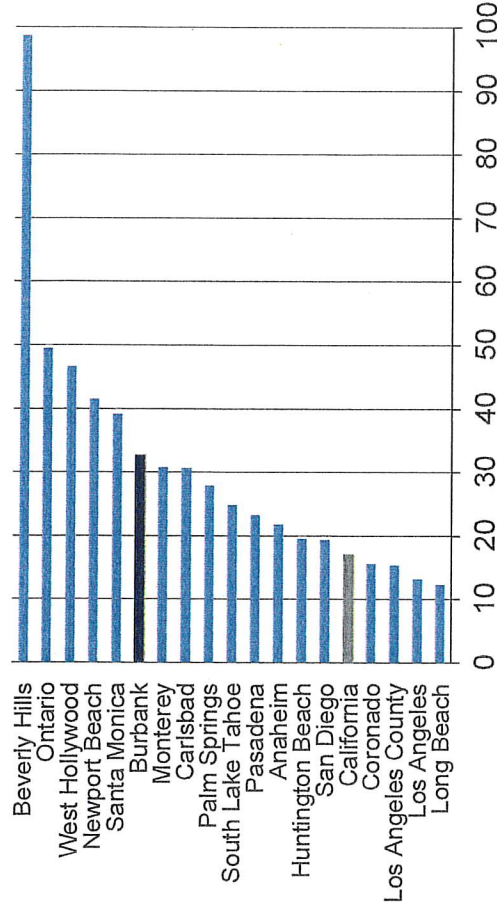


# Retail is a draw for Burbank

- Burbank's total retail sector (local and non-local demand) is significant at nearly \$3.5 billion in fiscal 2017.
- The City's shopping options draw in visitors and also locals from surrounding cities.
- Taxable retail sales per person in Burbank were more than \$32,000, nearly double the state average of \$17,000.
- Visitor retail spending is estimated to support 7% of total retail employment in the City, a share that has held steady since 2015.

## Burbank is a Retail Center

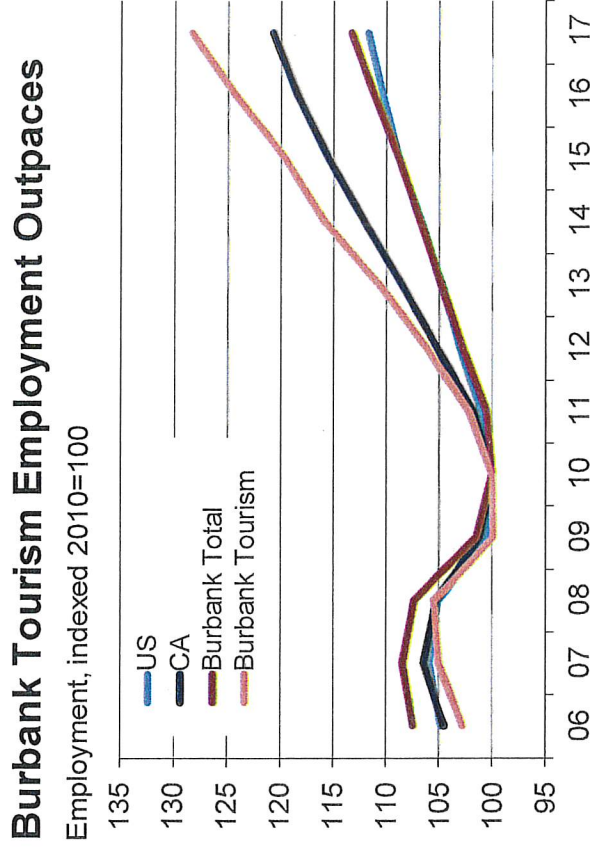
Taxable retail sales per capita, FY2017, \$ths



Sources: U.S. Census, CA BOE, Tourism Economics

# Key themes for 2017

- Total employment growth in Burbank is tracking that of the U.S.
- Tourism employment growth in the City is outpacing overall jobs growth for the state and the U.S.
- Tourism jobs are 28.4% higher than in 2010. The industry has added more than 228 jobs per year in Burbank, an average annual change of 3.6% since 2010.



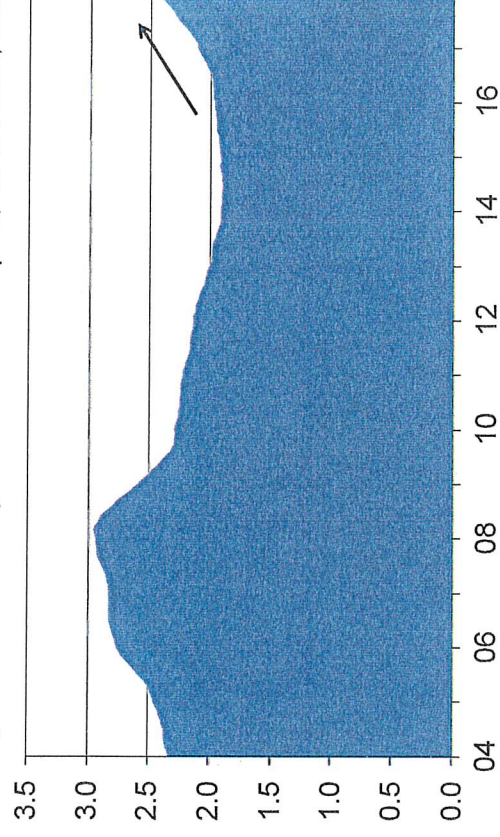
Sources: BEA, CA Dept. of Labor, Tourism Economics

# Key themes for 2017

- Total air passenger traffic to Burbank continues a slow recovery. A 15% increase in 2017 boosted passenger volume to about 20% below the 2007 peak.
- A total 2.4 million passengers arrived at Hollywood Burbank Airport, compared with 2.9 million in 2007.
- Measured by seat capacity and passenger volume, Burbank is most connected to Oakland, Las Vegas, San Jose, and Phoenix. Nearly 57% of passenger arrivals came from these four cities in 2017.

## Air Passenger Volume Jumped in 2017

Passenger arrivals at Hollywood Burbank Airport, 12-mo sum, millions

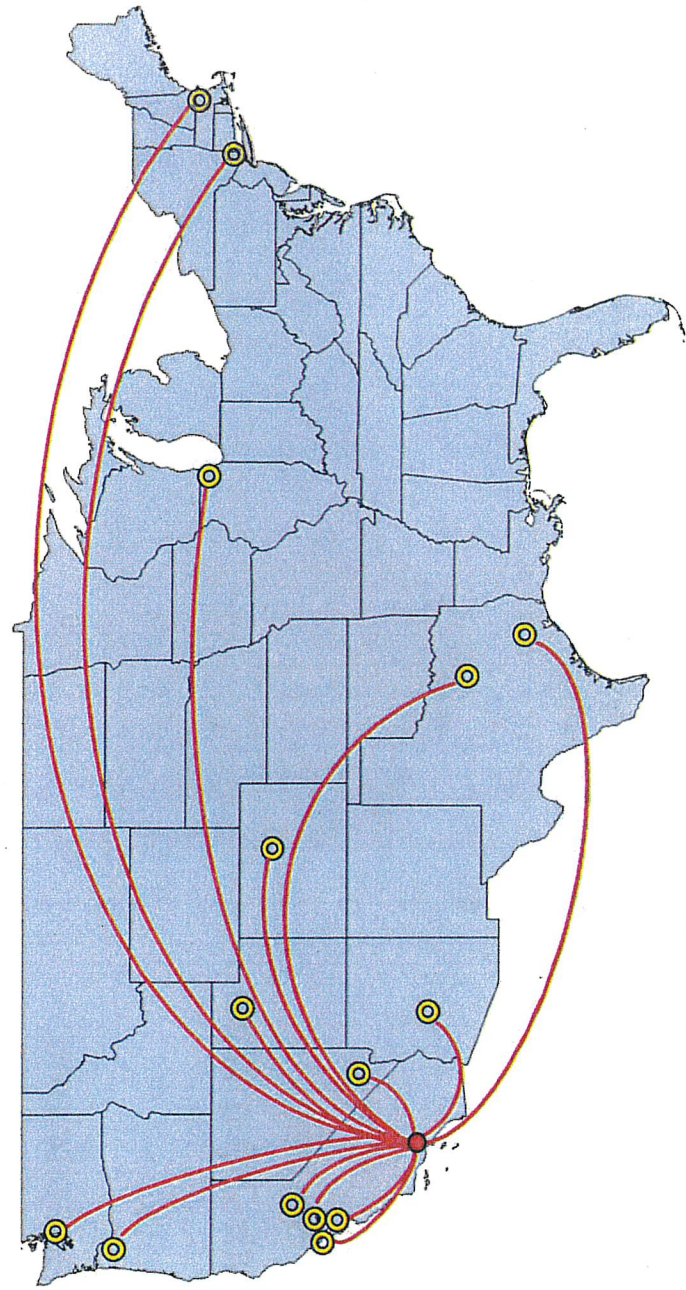


Sources: U.S. BTS, Tourism Economics

# Burbank air connectivity

● Direct flights to Burbank are available from 15 U.S. cities, including:

- New York
- Boston
- Chicago
- Dallas
- Houston
- Seattle
- Portland
- Denver
- Salt Lake City
- Las Vegas
- Phoenix
- San Francisco
- San Jose
- Oakland
- Sacramento



# Visitor Spending

---



TOURISM  
ECONOMICS

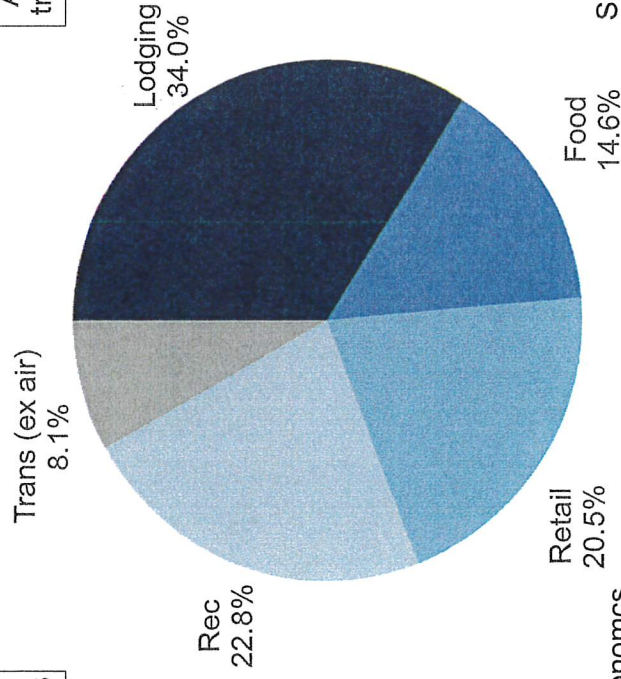
AN OXFORD ECONOMICS COMPANY

# Composition of tourism spending

- Overnight visitor spending came primarily in lodging, followed by recreation and retail. Day visitors spend primarily in recreation and retail, with nearly two-thirds of their spending in these two categories.
- Burbank visitors tend to have higher than average income and engage in significant retail spending.

## Overnight Visitor Spending Profile

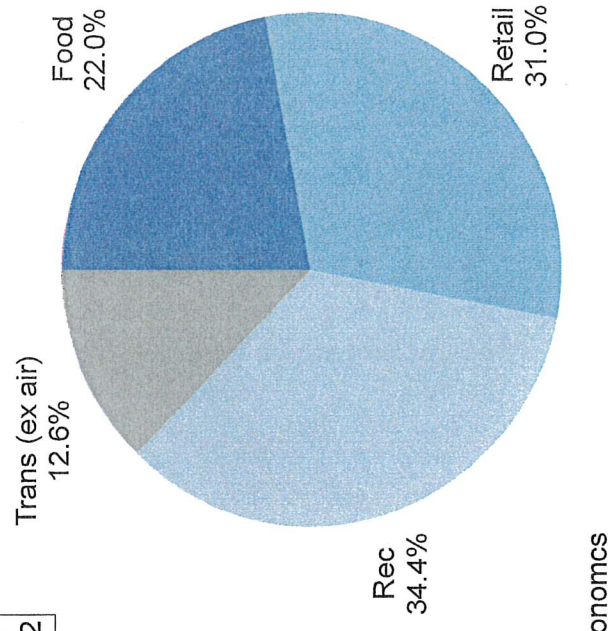
Avg per person per trip spending = \$323



Source: Tourism Economics

## Day Visitor Spending Profile

Avg per person per trip spending = \$142

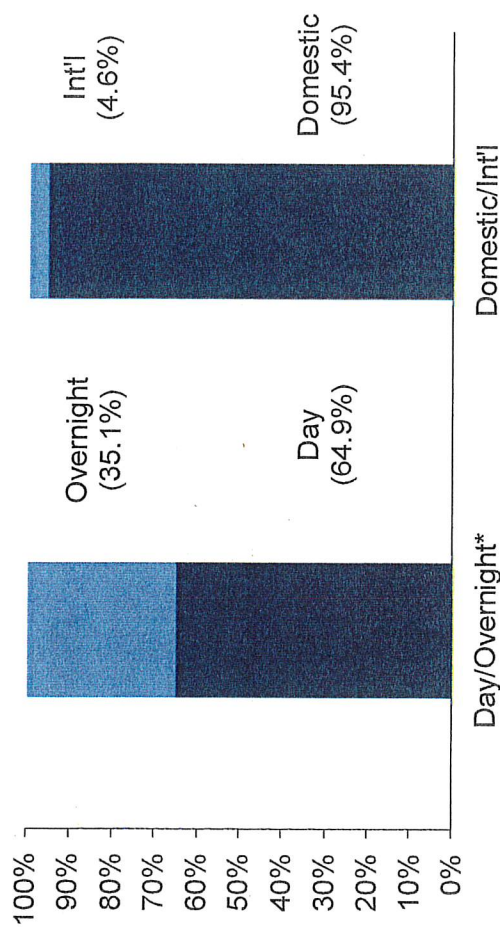


Source: Tourism Economics

# Visitor segmentation

- Most visitors to Burbank came for the day (64.9%), and 35.1% stayed overnight.
- International visitors account for 4.6% of visitation, but they stay longer and spend significantly more than domestic visitors. International visitors account for 16% of spending.

**Burbank Visitor Characteristics**



Sources: Tourism Economics  
\*Domestic only

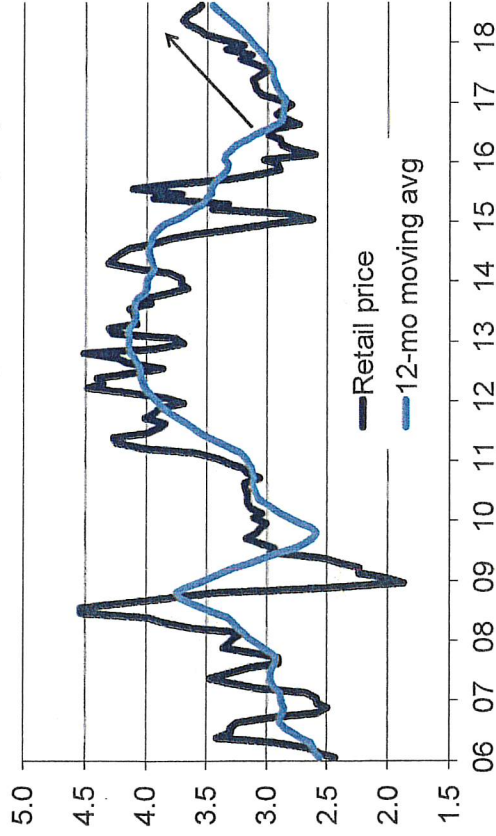


# Lower fuel prices free up resources

- Gasoline prices in the L.A. region rose nearly 9% in 2017.
- The increase came off of a 6-year low and price levels are still at a relatively modest level.
- Affordable gas prices support travel and boost consumer confidence, encouraging more trips and visitor spending in Burbank that otherwise might not occur.
- Oxford Economics forecasts oil prices to remain under \$70 per barrel through 2020, which implies L.A. area gas prices under \$3.75 per gallon for an extended period.

## Gas Prices Are On the Rise

Los Angeles area gasoline price, all grades, dollars per gallon



Source: Energy Information Administration

**Rising gas prices threaten to put a damper on visitor spending**

# Detailed composition of tourism spending

- Visitor spending increased 6.6% in 2017, with lodging leading growth at more than 15.8%, followed by food and beverage at 8.0%, and recreation at 5.3%.
- These estimates exclude the impacts of evacuations and then relocations of residents in the region due to the Porter Ranch gas leak in 2015.

<b>Burbank Visitor Spending By Category</b>						
US\$ Millions						
	2013	2014	2015	2016	2017	2016-17 % ch
Lodging	96.6	104.2	122.7	134.8	156.1	15.8%
Food and beverage	106.7	114.2	124.2	134.8	145.5	8.0%
Retail	172.2	181.6	190.9	202.8	205.6	1.3%
Recreation	167.7	176.9	182.2	197.1	207.6	5.3%
Local transportation	79.8	81.0	81.1	83.9	85.6	2.0%
Air transportation (local)	24.4	24.5	23.6	24.2	29.0	19.5%
<b>Total</b>	<b>647.5</b>	<b>682.4</b>	<b>724.8</b>	<b>777.6</b>	<b>829.3</b>	<b>6.6%</b>
% change	3.1%	5.4%	6.2%	7.3%	6.6%	

# Economic Impacts

---



TOURISM  
ECONOMICS

AN OXFORD ECONOMICS COMPANY

# How visitor spending generates impact

- **Direct:** Travelers create direct economic value within a discrete group of sectors (e.g. recreation, transportation). This supports a relative proportion of jobs, wages, taxes, and GDP within each sector.
- **Indirect:** Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts.



- **Induced:** Lastly, the induced impact is generated when employees whose incomes are generated either directly or indirectly by tourism, spend those incomes in the local Burbank economy.

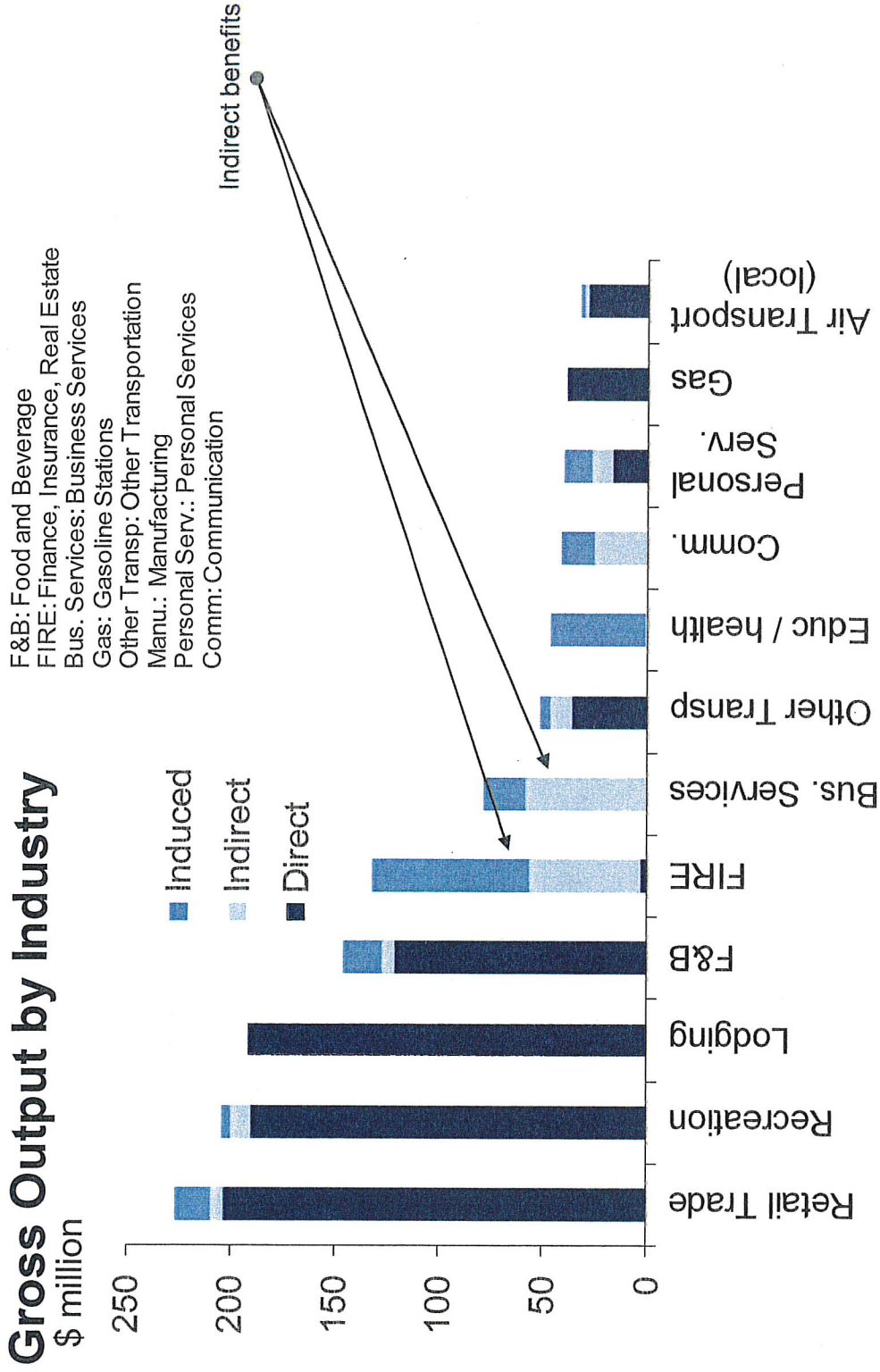
# Tourism sales

- Including indirect and induced business sales, tourism generated \$1.1 billion in revenue in 2017.

<b>Gross Output (Business Sales)</b> (US\$ Million)				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	1.6	0.8	2.4
Construction and Utilities	-	3.9	2.1	6.0
Manufacturing	-	8.8	6.1	14.8
Wholesale Trade	-	4.2	5.4	9.6
Air Transport (local)	29.0	0.7	1.2	30.8
Other Transport	36.0	5.3	2.6	43.9
Retail Trade	203.1	3.3	8.5	215.0
Gasoline Stations	38.4	0.1	0.4	38.9
Communications	-	12.9	7.8	20.7
Finance, Insurance and Real Estate	2.4	27.0	38.1	67.4
Business Services	-	29.1	10.3	39.3
Education and Health Care	-	0.3	22.9	23.2
Recreation and Entertainment	190.6	4.7	2.4	197.7
Lodging	191.4	0.1	0.1	191.6
Food & Beverage	121.4	3.2	9.2	133.8
Personal Services	17.0	4.9	6.7	28.7
Government	-	2.8	2.0	4.9
<b>TOTAL</b>	<b>829.3</b>	<b>112.8</b>	<b>126.4</b>	<b>1,068.5</b>

\* Direct sales include cost of goods sold for retail sectors

# Tourism sales

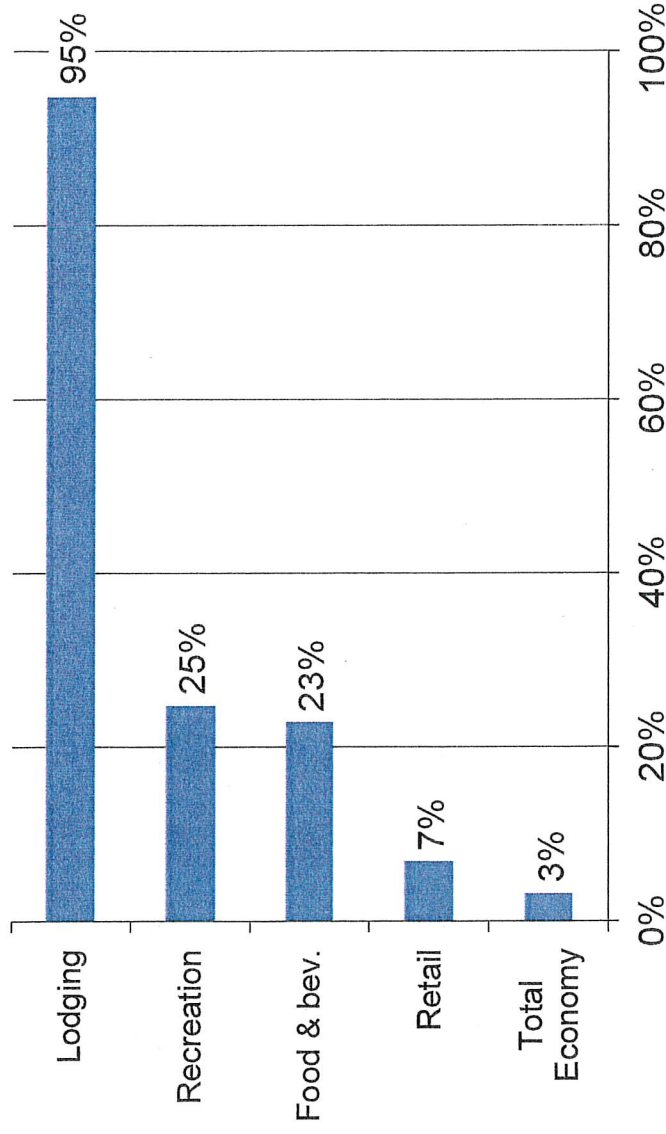


\* Direct sales include cost of goods sold for retail

# Tourism share of key industry employment

## Tourism Employment Intensity by Industry

Burbank direct jobs as a share of total by industry, %



Source: Tourism Economics

- Tourism is a significant part of several industries – tourism directly supports nearly all employment in lodging, 25% of recreation, and 23% of food and beverage. Total jobs supported in Burbank amount to 8,703.

# Tourism employment details

Tourism Employment				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	0	2	1	3
Construction and Utilities	0	14	8	22
Manufacturing	0	10	7	18
Wholesale Trade	0	18	23	40
Air Transport (local)	68	2	3	73
Other Transport	330	41	18	389
Retail Trade	735	37	92	863
Gasoline Stations	41	1	4	46
Communications	0	21	14	35
Finance, Insurance and Real Estate	10	122	108	241
Business Services	0	218	85	303
Education and Health Care	0	5	227	232
Recreation and Entertainment	2,928	49	29	3,006
Lodging	856	1	1	858
Food & Beverage	1,886	40	132	2,058
Personal Services	360	58	89	507
Government	0	7	5	12
<b>TOTAL</b>	<b>7,214</b>	<b>645</b>	<b>844</b>	<b>8,703</b>

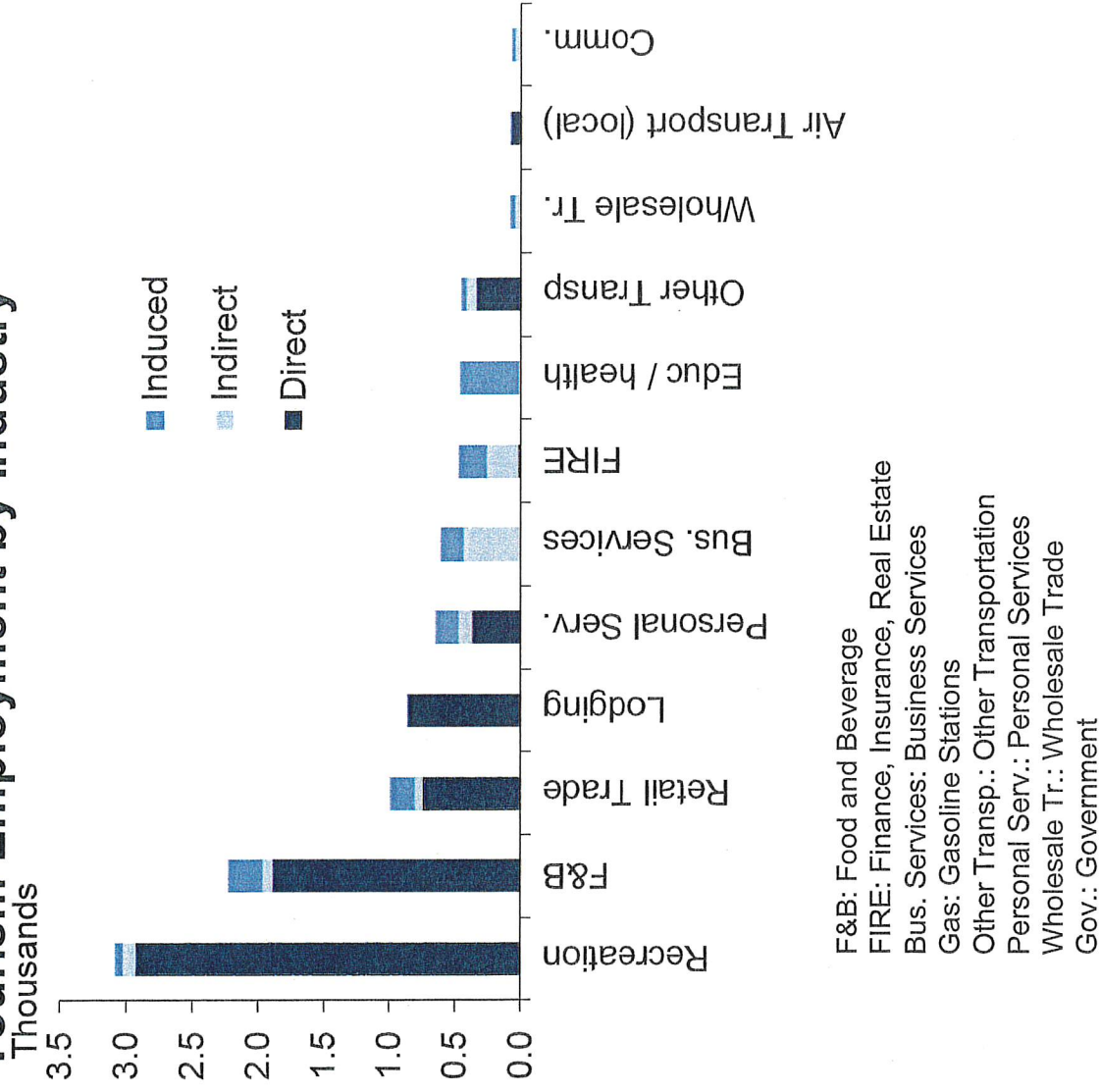
- The tourism sector supported 8,703 jobs or 3.9% of employment (1-in-25 jobs) in Burbank in 2017, including indirect and induced impacts.



# Tourism employment summary

- As a labor intensive collection of services, tourism-related sectors are significant Burbank employers.
- The nearly 9,000 jobs supported by Burbank tourism span most sectors of the economy, either directly or indirectly.
- The most significant indirect impacts are in business services, personal services, and FIRE.

**Tourism Employment by Industry**



# Tourism personal income

<b>Tourism Labor Income (Compensation)</b>				
<b>(US\$ Million)</b>				
	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
Agriculture, Fishing, Mining	-	0.3	0.1	0.5
Construction and Utilities	-	1.1	0.6	1.8
Manufacturing	-	0.8	0.5	1.3
Wholesale Trade	-	1.4	1.8	3.2
Air Transport (local)	6.9	0.2	0.3	7.3
Other Transport	13.1	2.1	1.0	16.3
Retail Trade	23.3	1.2	3.7	28.2
Gasoline Stations	3.0	0.1	0.3	3.3
Communications	-	3.6	1.7	5.3
Finance, Insurance and Real Estate	0.8	5.3	5.7	11.8
Business Services	-	14.4	5.2	19.6
Education and Health Care	-	0.2	13.2	13.4
Recreation and Entertainment	92.6	2.6	1.0	96.2
Lodging	78.5	0.0	0.0	78.6
Food & Beverage	56.6	1.3	4.2	62.1
Personal Services	9.5	3.4	4.0	16.9
Government	-	1.0	0.8	1.7
<b>TOTAL</b>	<b>284.2</b>	<b>39.0</b>	<b>44.2</b>	<b>367.4</b>

- Employees in Burbank earned \$367.4 million as a result of visitor activity in 2017.

# Tourism tax generation

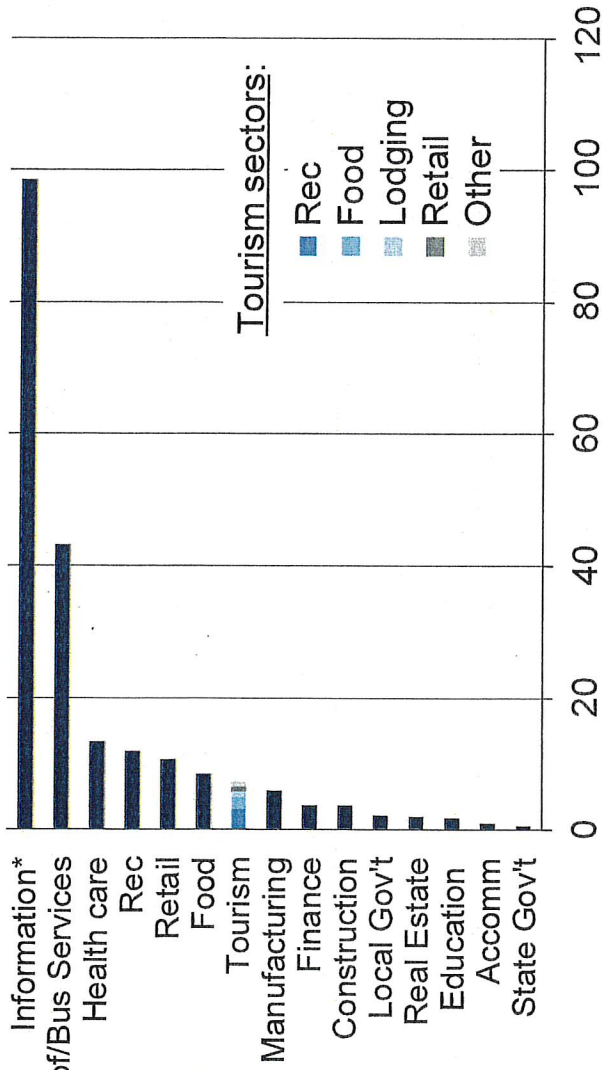
Tourism-Generated Revenues Tax Revenues 2017, \$Millions		Amount
<b>Federal</b>		
Personal Income		28.7
Corporate		10.4
Indirect business		6.5
Social Security		36.8
<b>Federal total</b>		<b>82.5</b>
<b>State</b>		
Sales		17.5
Personal Income		10.9
Corporate		1.9
Social Security		0.9
Other Taxes and Fees		3.3
<b>State total</b>		<b>34.5</b>
<b>Local</b>		
Sales		3.5
Lodging (TOT)		11.5
Property		18.6
Other Taxes and Fees		3.2
<b>Local total</b>		<b>36.7</b>
<b>TOTAL</b>		<b>153.7</b>

- Tourism generated \$153.7 million in taxes in 2017.
- Tourism-driven state and local tax proceeds of \$71.2 million helped offset the tax burden on city households. Without tourism-generated tax revenues, each household would need to pay \$1,428 more to maintain the same level of public services.
- \$36.7 million in local taxes were generated by tourism in 2017. Most property tax revenues do not accrue to the City of Burbank.

# Tourism in context

## Tourism as an Industry in Burbank

Estimated jobs in City of Burbank, by industry, 2017



Sources: U.S. Census, BEA, Tourism Economics

\*Note: Information includes publishing, recording studios and broadcasting

- Taken as an industry, tourism is the 7th largest employer in Burbank, accounting for more than 7,200 direct jobs in the City.

# Visitor Profile in Detail

---



**TOURISM  
ECONOMICS**

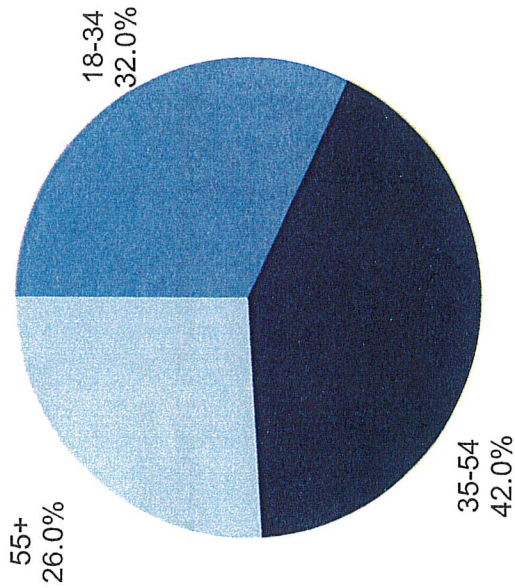
AN OXFORD ECONOMICS COMPANY

# Demographics: age and marital status

- Most visitors to Burbank are between 35 and 54 years.
- 57% of visitors are married or living with their partner.

## Age Distribution of Burbank Visitors

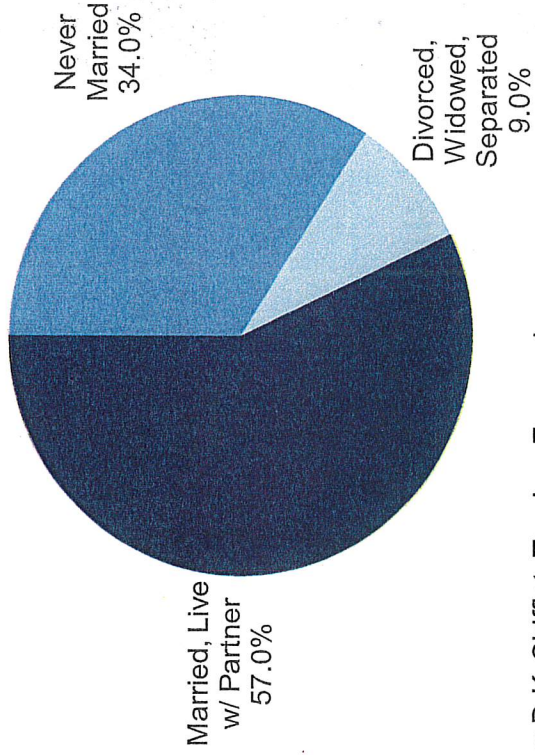
2017, mean age = 44 years



Sources: D.K. Shifflet, Tourism Economics

## Marital Status

2017



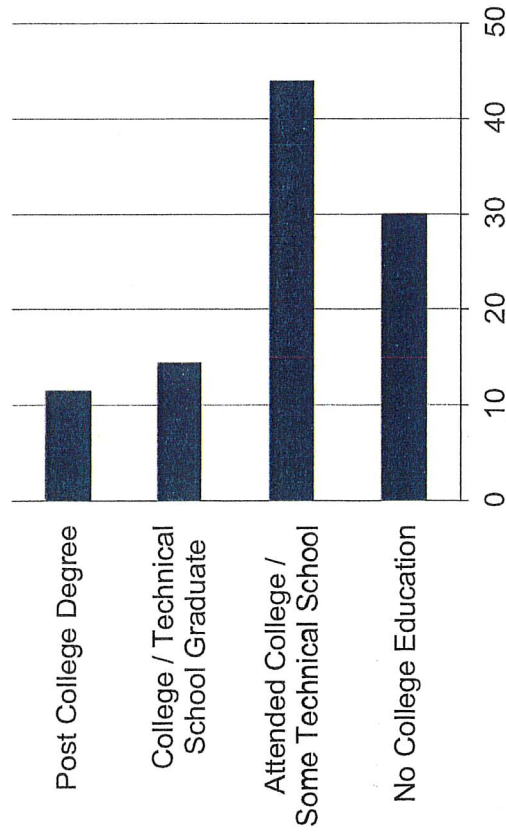
Sources: D.K. Shifflet, Tourism Economics

# Demographics: education and income

- 26% of visitors have at least a bachelor's degree.
- The average annual household income of visitors to Burbank is \$102,900, higher than the US overall (\$92,100).

## Education by Highest Level Achieved

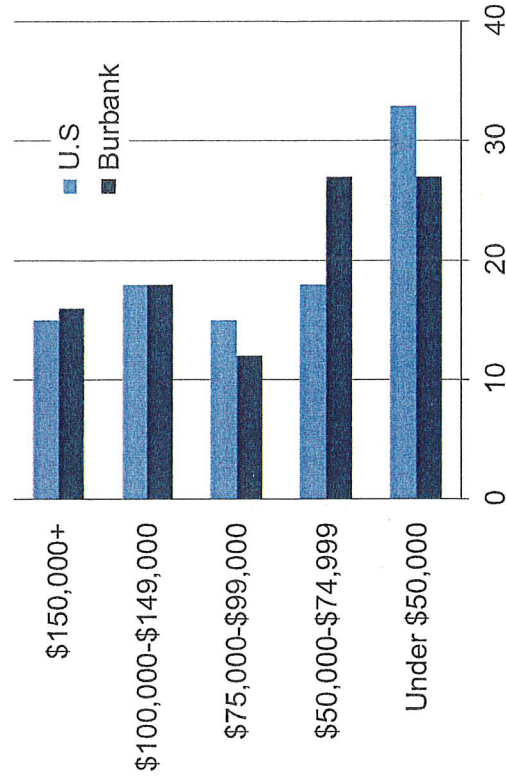
2017, Education level achieved, %



Sources: D.K. Shifflet, Tourism Economics

## Household Income of Visitors to...

2017, US mean = \$92.1k, Burbank = \$102.9k

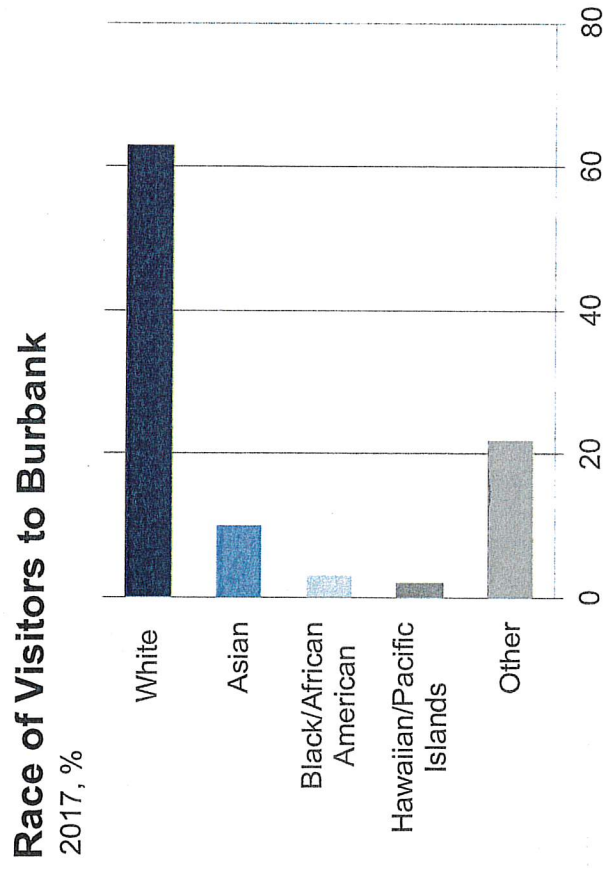


Sources: D.K. Shifflet, Tourism Economics

# Demographics: race

---

- Most visitors to Burbank identify as White (63%), followed by Asian.

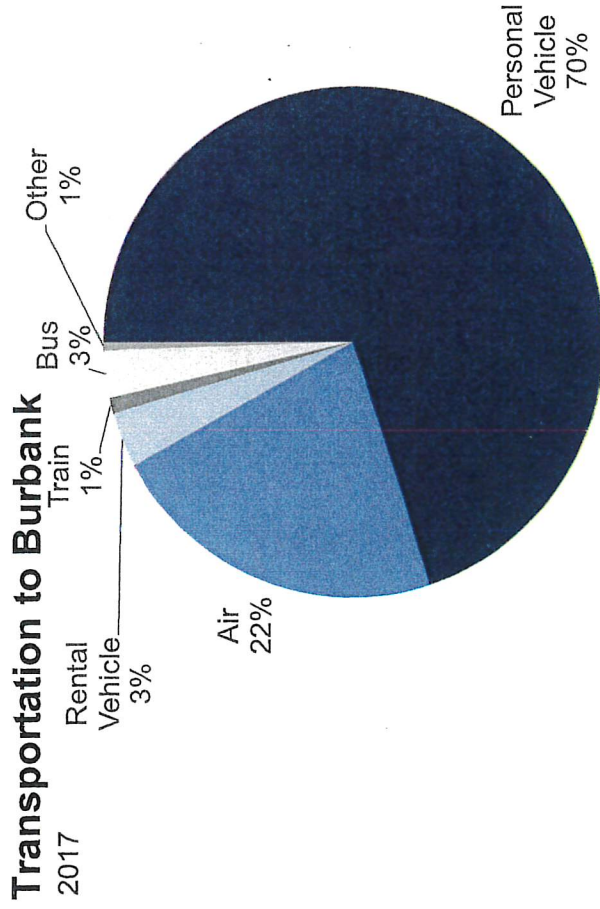


Source: D.K. Shifflet, Tourism Economics

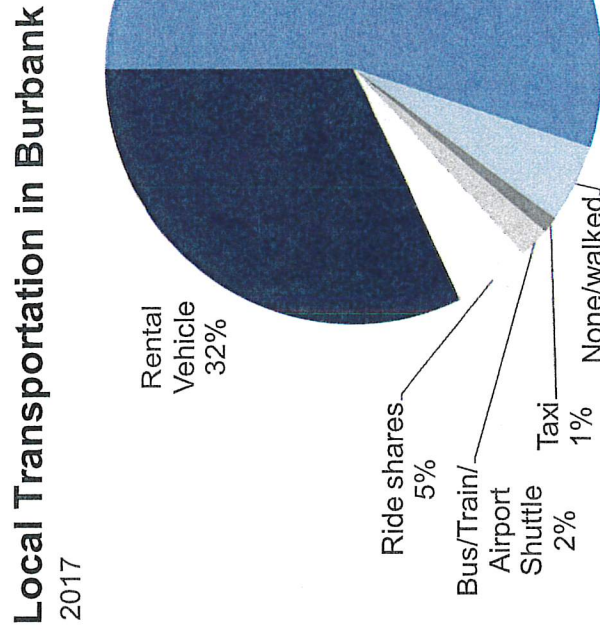


# Visitor characteristics: transportation

- 22% of visitors to Burbank arrive in the region by air.
- Most visitors use a personal vehicle for local transportation.



Sources: D.K. Shifflet, Tourism Economics



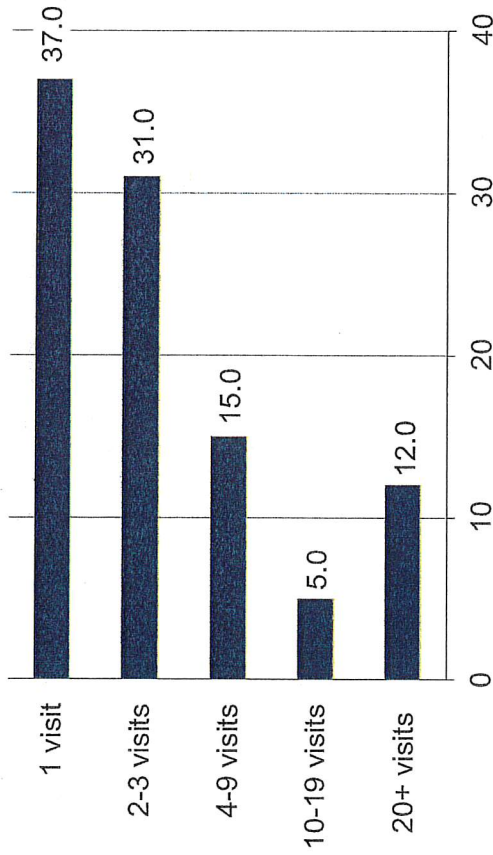
Sources: D.K. Shifflet, Tourism Economics

# Visitor characteristics: repeat visitors

- 37% of visitors have traveled to Burbank just once, while most visitors have traveled to the city multiple times.

**Repeat Visitors to Burbank**

2017, Visits in last 3 years, %

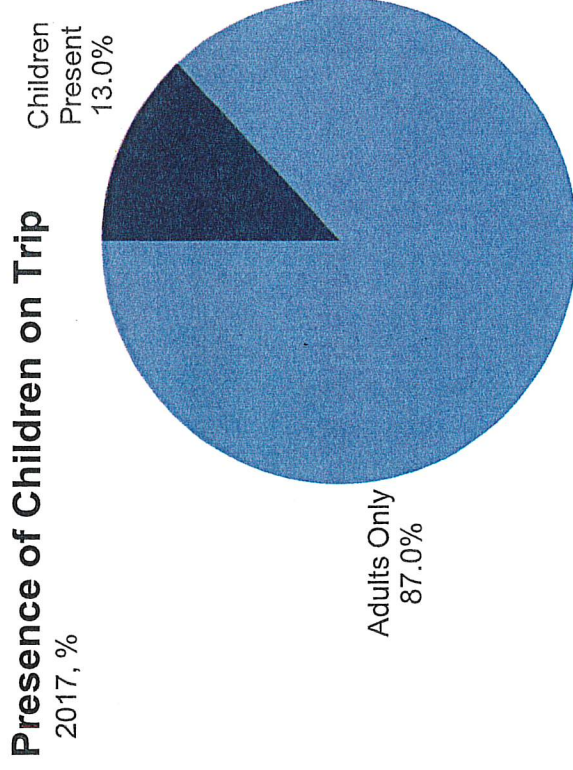


Sources: D.K. Shifflet, Tourism Economics

# Visitor characteristics: trip composition

---

- Most visitors to Burbank (87%) travel without children.
- An average party consists of two (1.6 rounded) adults, although 54% of visits to Burbank consist of just one adult.



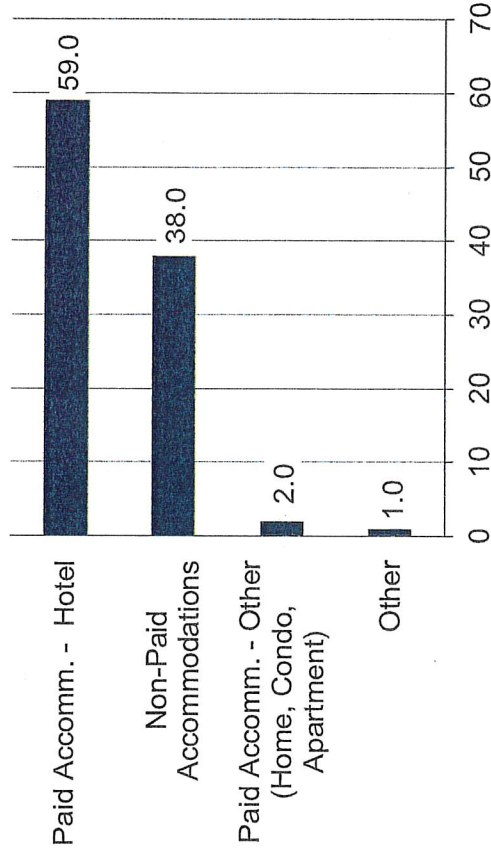
Sources: D.K. Shifflet, Tourism Economics

# Visitor characteristics: accommodations choice

- Among overnight visitors, 59% stayed in a traditional hotel, and 2% in other paid accommodations, such as a rented home or apartment.

Accommodations Among Overnight Visitors

2017, %

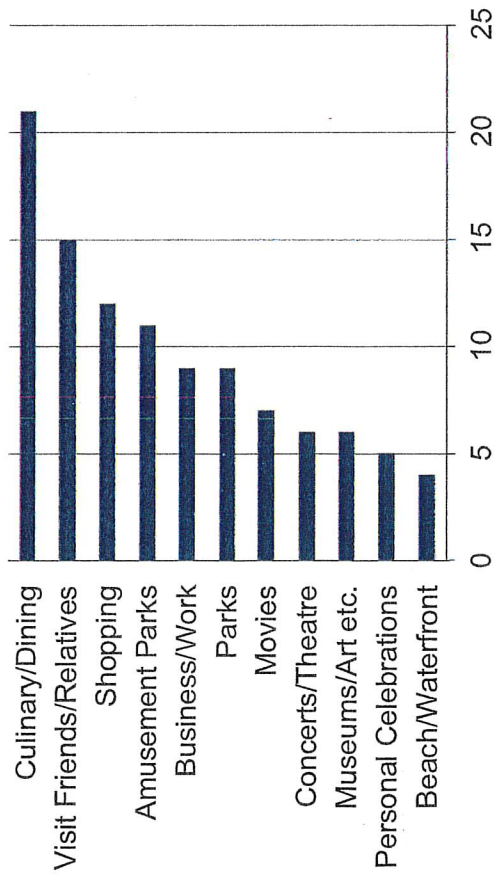


Sources: D.K. Shifflet, Tourism Economics

# Visitor activities

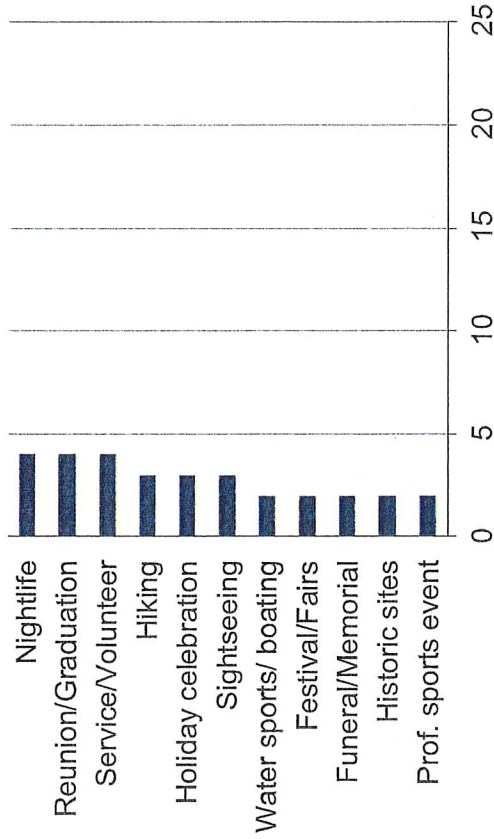
- Dining, visiting friends and relatives, and shopping are the top activities for visitors to Burbank.

**Activities While in Burbank**  
2017, %



Sources: D.K. Shifflet, Tourism Economics

**Activities While in Burbank (continued)**  
2017, %



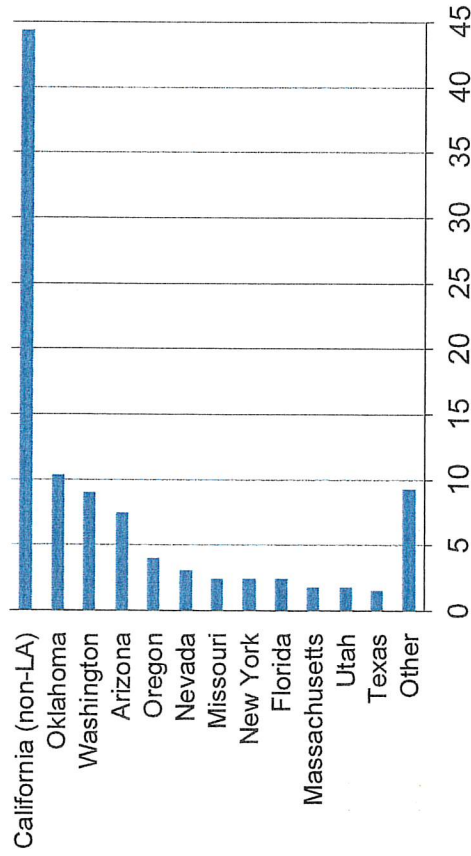
Sources: D.K. Shifflet, Tourism Economics

# Source markets

- Burbank's tourism is primarily regional and nearly 45% of all visitors come from California (excluding the Los Angeles area). In-state Destination Marketing Areas (DMA) are key source markets.
- On average, Burbank visitors come from 338 miles away.

## Top Source Markets by State

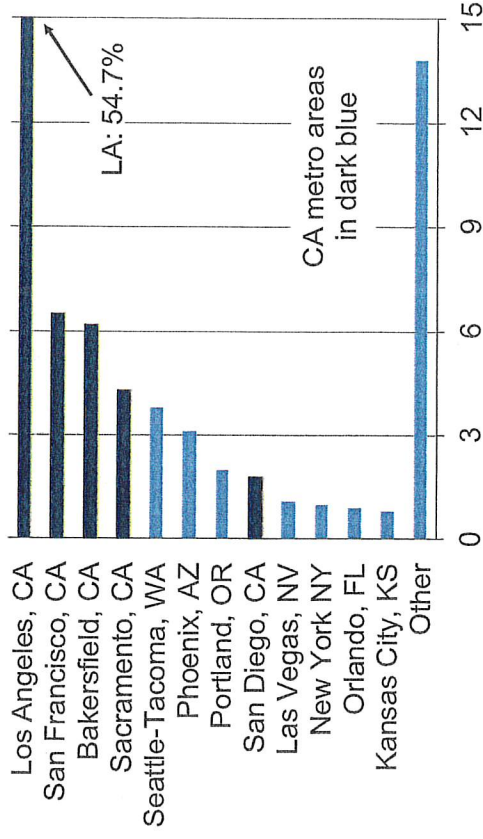
2017, share of total visitors, %



Sources: D.K. Shifflet, Tourism Economics

## Top Source DMA Regions

2017, share of total visitors, %

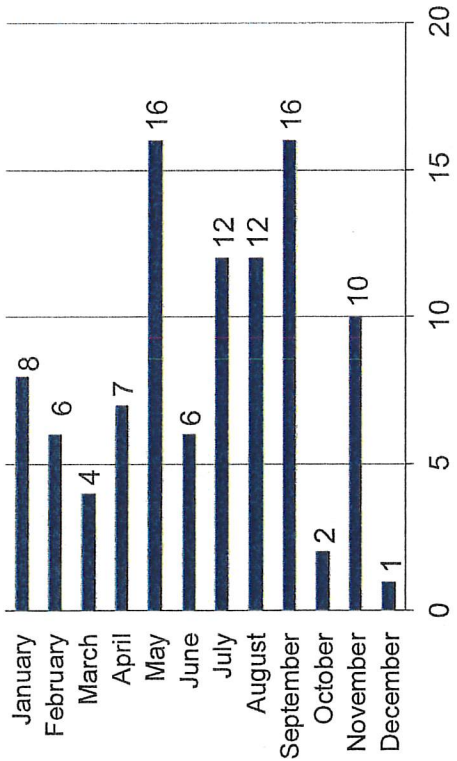


Sources: D.K. Shifflet, Tourism Economics

# Seasonality of tourism

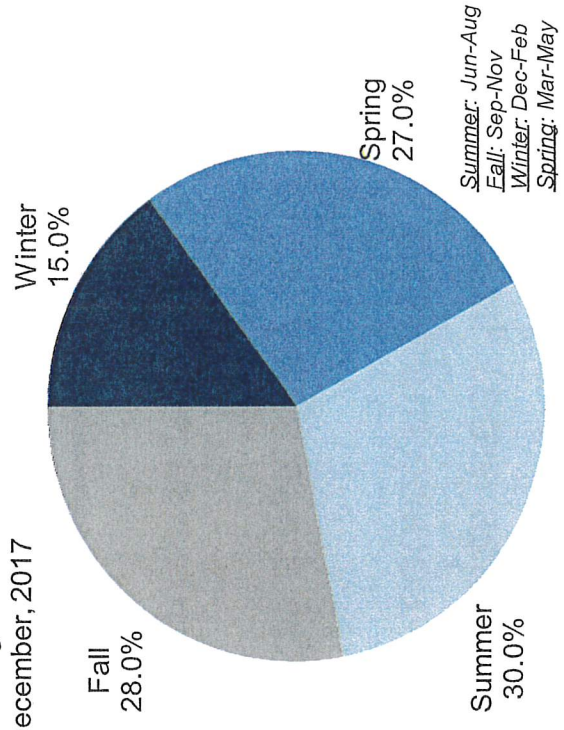
- May and September are key months for visitors to Burbank.
- By season, nearly 30% of visitors came in Summer, 28% in Fall, 27% in Spring, and 15% in Winter.

**Seasonality of Visitation by Month**  
January to December, 2017, %



Sources: D.K. Shifflet, Tourism Economics

**Visitation by Season**  
January-December, 2017



Sources: D.K. Shifflet, Tourism Economics

# Notes

---



TOURISM  
ECONOMICS

AN OXFORD ECONOMICS COMPANY



## Why quantify the tourism economy?

---

- By monitoring tourism's economic impact, policy makers can make informed decisions regarding the funding and prioritization of tourism development.
- It can also carefully monitor its successes and future needs.
- In order to do this, tourism must be measured in the same categories as other economic sectors – i.e. tax generation, employment, wages, and gross domestic product.

## Why is this a challenge?

---

- Most economic sectors such as financial services, insurance, or construction are easily defined within a region by economic data and statistics.
- Tourism is not so easily measured because it is not a single industry. It is a demand-side activity which affects multiple sectors to various degrees.
- Tourism spans nearly a dozen sectors including lodging, recreation, retail, real estate, air passenger transport, food & beverage, car rental, taxi services, travel agents, museums, and theme parks.

## Methods and data sources


---

- Estimates of visitor volume and expenditures in Burbank were based on several sources:
  - Visitor profile data, volume and spending estimates produced by D.K. Shifflet and Longwoods International, national consumer research firms, for Los Angeles County and comparable regional destinations in the County
  - Smith Travel Research (STR) data on hotel room demand, supply, revenues, average prices, and occupancy rates.
  - U.S. Census data on sales and employees by industry.
  - Sales tax and Transient Occupancy Tax (TOT) data were obtained from the CA Board of Equalization and the City of Burbank .
- An IMPLAN input-output model was constructed for Los Angeles County. The model traces the flow of visitor-related expenditures through the local economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism. Tourism Economics then cross-checked these findings with jobs and wage data for each sector. Adjustments were made to ensure results capture impacts in the City of Burbank only.
- The source of the employment and wage data is the Regional Economic Information System (REIS), Bureau of Economic Analysis. This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data because sole-proprietors, which do not require unemployment insurance and are not counted in the ES202 data.
- Data on Los Angeles gasoline prices were obtained from the Energy Information Administration.

# Description of spending categories

Spend Category	Description
Lodging	Includes visitor spending in accommodation sector. This includes food and other services provided by hotels and similar establishments.
Recreation	Includes visitors spending within the arts, entertainment and recreation super-sector.
Local transport	Includes all forms of local transport services such as taxis, limos, trains, rental cars, and buses.
Shopping	Includes visitor spending in all retail sectors within the Burbank economy.
Service stations	Visitor spending on gasoline. Only the margin counts as local economic impact.
Second homes	Where appropriate, spending associated with the upkeep of seasonal second homes for recreational use as defined by the Census Department.
Food and beverage	Includes all visitor spending at restaurants and bars in Burbank.

---



**TOURISM  
ECONOMICS**

AN OXFORD ECONOMICS COMPANY

For more information:

[info@tourismconomics.com](mailto:info@tourismconomics.com)



**CITY OF BURBANK  
PARKS AND RECREATION  
ANNOTATED AGENDA/MEETING SUMMARY**

Meeting: Parks and Recreation Board

Date: Thursday, February 14, 2019

**Staff Present:** Judie Wilke, Parks and Recreation Director; Marisa Garcia, Assistant Parks and Recreation Director; Kris Smith, Deputy Director; Kristen Hauptli, Administration Analyst II; Paula Ohan, Administrative Analyst II; Andrea Yanez, Sr. Recreation Leader.

**Board Members Present:** Ms. Lowers, Ms. Burghdorf, Mr. Gussow, Mr. DePalo.

**Board Members Absent:** Ms. Jackson.

Item Discussed	Summary	Direction or Action, if any
1 Announcements	Andrea Yanez announced the Department's upcoming events.	
2 Recognitions	None.	
3 Oral Communications	None.	
4 Written Communications	None.	
5 Park Board Comments	Ms. Burghdorf reported that at February 14 meeting the Burbank Cultural Arts Commission voted on the students' entries for the Hollywood Burbank Tower Banner. Ms. Lowers reported that at the February Youth Board meeting, members of the Youth Board were invited to call upon the Parks and Recreation Department as facilitators on any issue or idea which may arise.	
6 The Colony Theatre Update	Ms. Garcia provided the Board with the update on the Colony Theatre (Colony). In January 2018, staff received a formal proposal from the Colony Theater to continue managing and operating the Center Stage Facility. Staff and the Colony are currently working on finalizing the Agreement which is scheduled to go to Council in March.	Noted and Filed.
7 Park Facility/Park Tour	Staff requested that the Board consider (4) four dates for a park facility/program tour.	It was moved by Mr. Gussow seconded by Mr. DePalo and carried 4-0 "to schedule a Special meeting on

CITY OF BURBANK  
**PARKS AND RECREATION**  
**ANNOTATED AGENDA/MEETING SUMMARY**

8	Budget Update – Fiscal Year 2019-2020	<p>Ms. Hauptli provided an update of the Fiscal Year 2019-2020 Budget. Parks and Recreation has submitted two revenue offset requests, one for an Administrative Analyst position for the Burbank PASS Program and the other to provide an additional Kinder Care programming site at Disney Elementary. In addition, staff included Capital Outlay requests for the purchase of three pieces of equipment (Skid-Steer Loader, Vermeer Chipper, Mini Excavator) for the Forestry and Landscape staff. At City Manager’s request, staff is discussing infrastructure needs and assessing priorities. Staff will continue to provide the Board with budget updates. Budget Adoption is scheduled in May 2019.</p>	Thursday, April 11 from 4-6 pm for a park facility and program tour.” Noted and Filed.
9	Consent Calendar	<p><u>Approval of Minutes</u>          Minutes for the January 10, 2019, July 12, 2018 (DARK), and December 13, 2018 (DARK) meetings</p> <p><u>City Council Agenda Items Update</u>          Noted and Filed.</p> <p><u>Contract Compliance</u>          Noted and Filed.</p> <p><u>Park Patrol Reports</u>          January 2019 Park Patrol Report was noted and filed.</p> <p><u>Departmental Operations Update</u>          Noted and Filed.</p>	It was moved by Mr. Gussow seconded by Mr. DePalo and carried 4-0 “to approve the Consent Calendar.”
10	Tabled Items	None.	
11	Second Period of Oral Communications	None.	
12	Additional Comments from the Board	Mr. DePalo welcomed Liam McKenna to the Youth Board and thanked Park and Recreation staff for the outstanding work during this heavy rainy season.	



**CITY OF BURBANK  
PARKS AND RECREATION  
ANNOTATED AGENDA/MEETING SUMMARY**

13	Introduction of New Agenda Items	Mr. Gussow would like an update on the programming schedule for the new Starlight Bowl season. Also, staff to provide last year's Infrastructure Plan for informational purposes.	
14	Adjournment	The meeting was adjourned at 7:05 p.m. in honor of Victoria Cusumano.	