



VISIT
BURBANK

A Better Way to SEE LA

YEAR IN REVIEW 2020-2021 LOOKING AHEAD 2021-2022



WELCOME

Dear Tourism Partners,

The COVID-19 pandemic in 2020 created the most challenging year in Visit Burbank's ten-year history. As with a majority of the U.S. state, travel sectors were near paralyzed — from air traffic, to hotel stays, and theme park visits — each was impacted by public health mandates, Stay at Home orders, closures, and a consequent fall in consumer travel sentiment. But throughout it all, Visit Burbank worked endlessly to keep Burbank top-of-mind, and to position the destination for a quick recovery. This annual report summarizes FY 2020-2021, while looking ahead to future projects and opportunities. Visit Burbank worked to:

- Gain visibility and sell packages to theme park attendees through the annual sponsorship of the Universal Studios Hollywood Partner Hotels program
- Develop group and business meetings with Hotelplanner, the largest online group hotel reservation system in the world, through the annual Preferred Member Program
- Intensify the Digital Media Campaign to reach new road trip and nonstop feeder markets, including Canada
- Take advantage of travel trade shows such as US Travel's IPW, the premier event to regenerate the international and domestic travel industry
- Boost hotel revenue by targeting three special events with the goal of generating \$441K in additional room nights
- Expand Destination Development with the introduction of the Wonder Woman bronze statue at the Warner Bros. Tour Center
- Fund high-speed fiber internet service at Burbank hotels through ONEBurbank

With a decade under our belt, here are a few insights giving a clear picture of how much the Burbank travel market has improved, despite the pandemic. Since our formation in 2011, Visit Burbank steered the evolution of tourism resulting in a:

- 12% increase in hotels, from 16 to 18. In addition, two new hotels are approved and three new proposed
- 16% increase in guest rooms, from 2,200 to 2,569. Another 459 rooms have been approved, and 732 proposed in five new properties.
- 11% increase in Average Daily Rate (impacted by the pandemic; 2019 was up 43%)
- 190% increase in nonflight destinations into Burbank, from 11 to 32
- \$7.19M in tourism investment by Visit Burbank; from 2011-2020
- \$200M private sector investment in hotel renovations and new construction

Visit Burbank is ready to drive a resurgence in travel and to boost Burbank's profile as a top Southern California destination. With the end of the pandemic in sight, we are eager to work with you to accelerate the recovery process, help to grow your business and to create a healthier tourism environment for visitors and residents alike.

Sincerely,



Danny Kahn, Board Chair
Burbank Hospitality Association

CONTENTS

YEAR IN REVIEW | 2020-2021

2 ABOUT/ANNUAL BUDGET/MISSION

4 MARKETING & SALES GOALS

5 DESTINATION DEVELOPMENT GOALS

6 DIGITAL STRATEGY: Keeping Pace with the Pandemic

MARKET & SALES

8 DIGITAL ADVERTISING

10 SOCIAL MEDIA

11 NEWSLETTERS

12 UNIVERSAL STUDIOS HOLLYWOOD

13 HOTELPLANNER PROGRAM

14 PARTNERSHIPS

16 WEBSITE UPDATES

LOOKING AHEAD | 2021-2022

18 MARKETING & SALES

19 MEDIA AND TRAVEL TRADE

20 SUPERHERO SELFIE SPOTS

22 STRATEGIC PARTNERSHIPS

23 DESTINATION DEVELOPMENT | ONEBURBANK

24 BURBANK TRAVEL MARKET TRENDS

26 INVESTMENTS IN TOURISM

28 HOTEL OCCUPANCY

30 BURBANK HOTELS

32 BOARD OF DIRECTORS AND STAFF

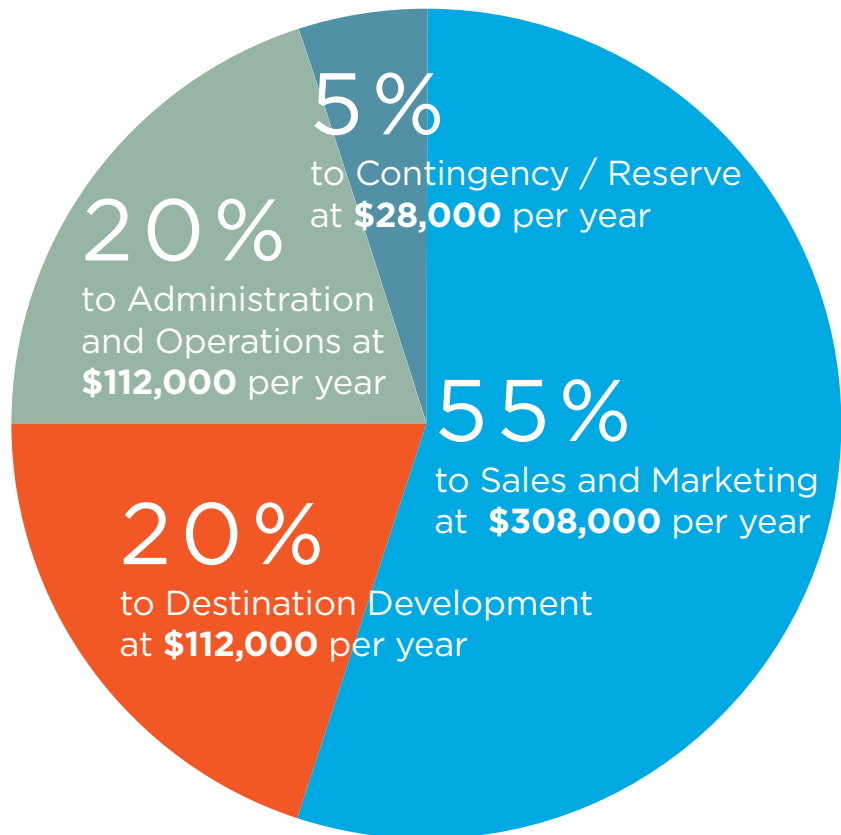


ABOUT

The Burbank Hospitality Association, the governing body of the Tourism Business Improvement District (TBID) and doing business as Visit Burbank, was formed in 2011 and is funded by a 1% assessment on overnight stays in Burbank hotels with more than 25 rooms.

ANNUAL BUDGET

Visit Burbank operated with a \$560,000 budget* in Fiscal Year 2020-2021 allocated as follows:



*Assessments have been heavily impacted by the COVID-19 pandemic and are 50% less than previous budget years.

MISSION

Visit Burbank's mission is to boost hotel occupancy by positioning Burbank as a domestic, national, and international tourist destination.



MARKETING & SALES GOALS

The goal is to promote Burbank as a top leisure and business destination by:

- Attracting drive time markets by geo-targeting commuters within a 300-mile radius, and nonstop flight markets into the Hollywood Burbank Airport
- Branding Burbank as a desirable conference and convention destination featuring a unique mix of quality conference hotels and non-traditional special event venues
- Increasing overnight stays via group sales by working with tour operators, online travel agents, and special events
- Leveraging marketing efforts through partnerships with Downtown Burbank Partnership, the Hollywood Burbank Airport, the Burbank Chamber of Commerce, DC Comics, Warner Bros. Studio Tours Hollywood, and Universal Studios Hollywood



DESTINATION DEVELOPMENT GOALS

Destination Development invests in a variety of projects designed to elevate the traveler experience in Burbank and create a more defined sense of place. Projects include:

- In partnership with DC Comics, rolling out a series of super hero bronze statues such as Wonder Woman (projected 2022) and more at tourism destinations across Burbank
- High-Speed Fiber Optics Internet Service for hotel guests provided through Burbank Water & Power's ONEBurbank
- Airline marketing support to promote new routes to build customer awareness of Burbank
- Comprehensive way-finding signage and district identity programs to enhance and inform the visitor experience



DIGITAL STRATEGY: Keeping Pace With The Pandemic

July 1, 2020 through the termination of the State of California's Blueprint for a Safer Economy state response on June 15, 2021

July 1, 2020 - March 7, 2021

PURPLE TIER

Advertising Focus: Road Trips and Staycations
Geo-targeting: Drive Markets and locals within a 300-mile radius
Goal: Encouraging overnight stays by appealing to local and regional markets



March 8 - March 28, 2021

RED TIER

Advertising Focus: Road Trips and Nonstop Feeder Markets into BUR
Geo-targeting: Drive Markets and Nonstop Feeder Markets
Goal: Encouraging overnight stays by appealing to both Drive Markets and destinations flying into BUR



March 29 - May 2, 2021

ORANGE TIER

Advertising Focus: Trips and Nonstop Feeder Markets into BUR
Geo-targeting: Drive Markets and Nonstop Feeder Markets
Goal: Encouraging overnight stays by appealing to both Drive Markets and destinations flying into BUR. Budget increased to include Google Display advertising



May 3 - June 14, 2021

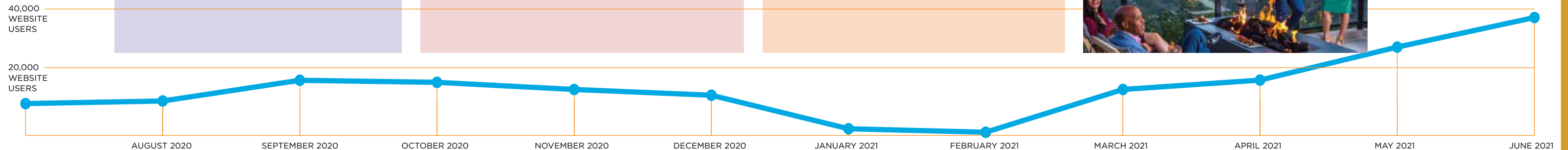
YELLOW TIER

Advertising Focus: With Universal Studios Hollywood reopened, road trips, and Nonstop Feeder Markets into BUR are reemphasized
Geo-targeting: Drive Markets and Nonstop Feeder Markets, with direct appeals to each inbound city
Goal: Encouraging overnight stays by appealing to both Drive Markets and destinations flying into BUR with the added incentive of Universal Studios Hollywood reopened



June 15, 2021

The Governor terminated the executive orders that put into place the Stay Home Order and the Blueprint for a Safer Economy. Advertising fully resumed, promoting Burbank's destination-ready status.



MARKETING & SALES | DIGITAL ADVERTISING

Visit Burbank's digital advertising campaign drove demand for hotel accommodations and attractions during challenging statewide and LA County orders responding to the pandemic. Advertising was focused exclusively on domestic and regional markets, with a focus on road trips and nonstop flights into Hollywood Burbank Airport. By responding to rapidly changing conditions, the campaign kept Burbank top-of-mind while travel restrictions were in place.

RESULT



Google Ads

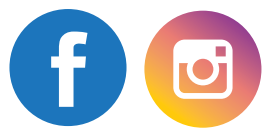
2.7M Impressions
18.3K Website Visits

Google
Display

1.5M Impressions
15.7K Website Visits

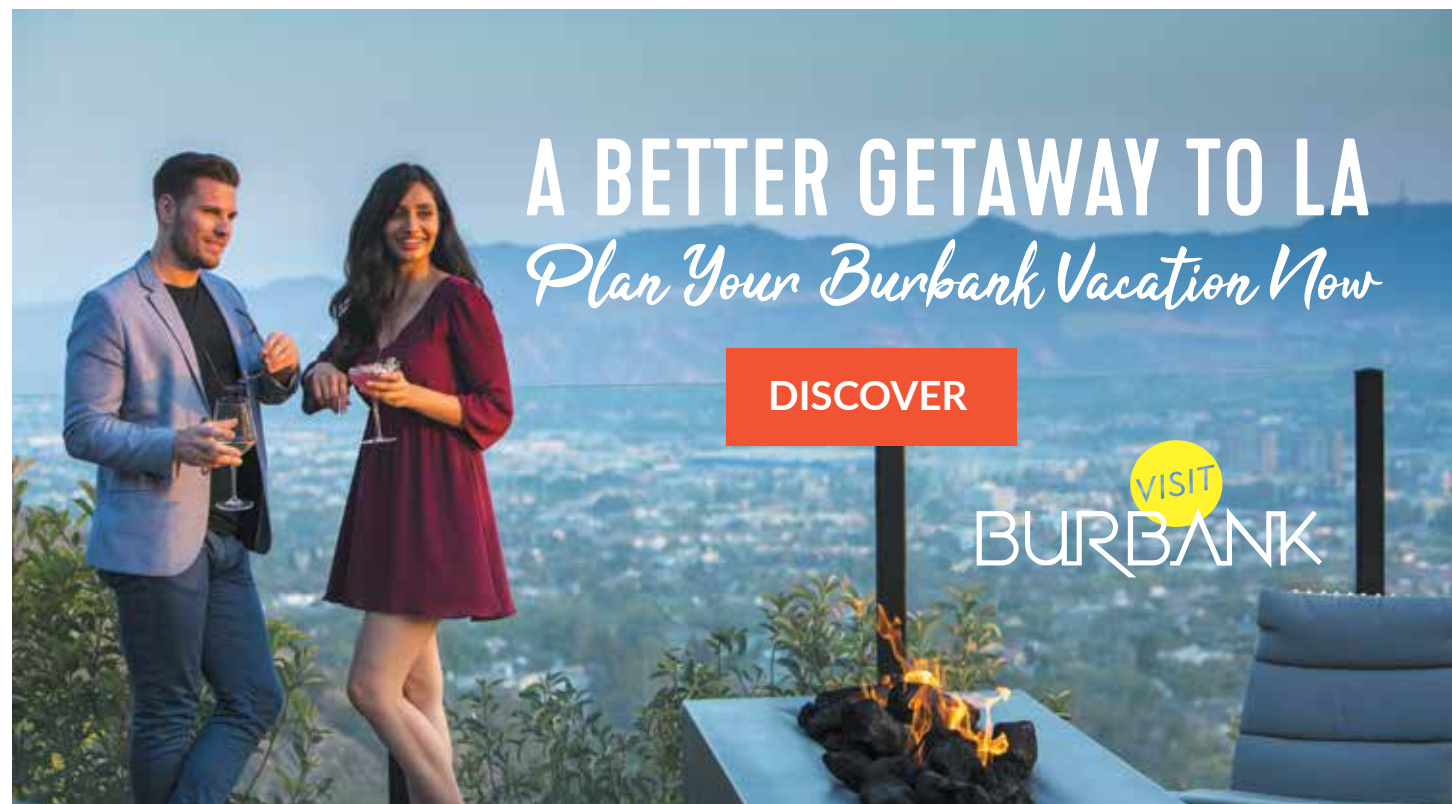
Google
Paid Search

Social Media **1.5M** Impressions
9.9K Website Visits



TOTAL **5.6M** Impressions
44K Website Visits

All data from July 1, 2020, through June 30, 2021



MARKETING & SALES | SOCIAL MEDIA

Social media supported the majority of Visit Burbank's communication during statewide Stay at Home orders at a time where the travel industry was reduced to a virtual standstill. Social posts were crafted to inspire future visits, to encourage outdoors activities, and were paired with citywide initiatives highlighting the latest safety measures, hotel updates for essential travel, takeout/delivery services, and new businesses.

RESULT



Facebook
1.7M Impressions
33K Engagements
31K Followers



Instagram
1M Impressions
50K Engagements
7.1K Followers



Twitter
367K Impressions
21.4K Engagements
3.2K Followers

TOTAL
3.1M Impressions
104K Engagements
41.4K Followers

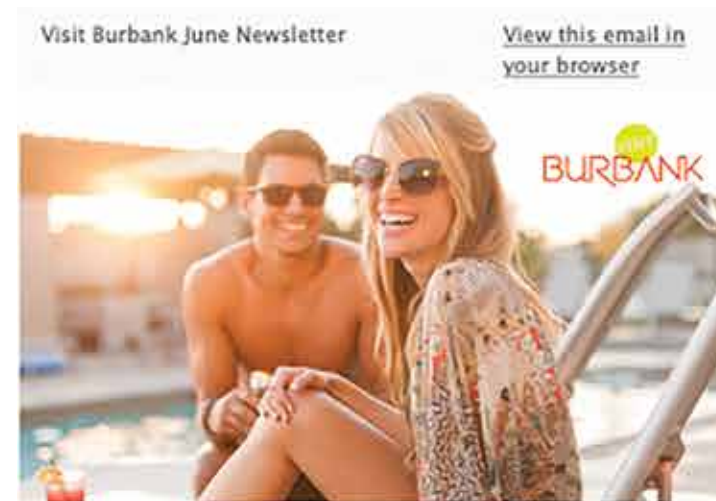
All data from July 1, 2020 through June 30, 2021

NEWSLETTERS

Monthly newsletters were instrumental in communicating updates about Burbank hotels and attractions, new retail and restaurants, statewide and LA county orders regarding the pandemic, and promotions of interest to the travel market.

RESULT

1,854 Opt-In Subscribers
16.7% Average Open Rate
2.45% Click-Through Rate



SUMMER IN BURBANK IS BACK IN FULL SWING!

It's been a long time coming, but we're excited to finally return to a summer of good times and fun as California fully reopens on June 15. As our



STAY & PLAY THE BURBANK WAY

Treat yourself to a fun filled getaway in beautiful Burbank, home to LA's best attractions, shops, food and more. Take the newly expanded backlot tour at Warner Bros. or head off to explore Universal Studios Hollywood. Dine al fresco in Downtown Burbank, then embark on a citywide shopping spree. Or spend a day lounging poolside at one of our famed hotels and motor lodges, perfect for getting away for a night or two or maybe even more! It's all right here in Burbank, Southern California's best getaway destination.

EXPLORE NOW

MARKETING & SALES | UNIVERSAL STUDIOS HOLLYWOOD PARTNER HOTELS

To gain visibility with theme park attendees, Visit Burbank funded the participation of 10 Burbank hotels in the Universal Parks & Resorts Vacations Partner Hotels program. As a result, Partner Hotels are included on www.universalstudioshollywood.com, where hotel packages can be purchased directly by park visitors.

RESULT



10 Participating Hotels
\$1.43K Room Revenue
371 Total Packages
826 Room Nights Booked

Universal Studios Hollywood reopened to California residents on April 9, 2021, so results are uniquely for the period April 2021 through October 2021.

Source: Universal Parks & Resorts Vacations



HOTELPLANNER PREFERRED MEMBER PROGRAM

With the goal of developing group bookings, Visit Burbank funded the participation of 10 Burbank hotels as Preferred Members with HotelPlanner, the largest online group hotel reservation system in the world.

RESULT

\$1.27M in referred business
42K in hotel revenue

Results are for the annual contract period of September 1, 2020 through August 31, 2021.

Source: Hotelplanner



MARKETING & SALES | PARTNERSHIPS

During the peak of the pandemic, when non-essential travel was discouraged, Visit Burbank secured partnerships with regional organizations focusing primarily on locals. The goal was to cement relationships, and to encourage responsible travel into Burbank as restrictions were relaxed.

RESULT

STARLIGHT BOWL SUMMER CONCERT SERIES

Concert ticket sweepstakes on social | Hotel booking link on concert producers' websites

3,140 Impressions

134 Engagement

PACIFIC SURFLINER

Reciprocal Blog Articles | Social Media Coordination

1,714 Impressions

98 Engagement

METROLINK

SoCal Explorer Discount Program
Social Media Support | Blog Article

2,142 Impressions

88 Engagement



MARKETING & SALES | WEBSITE UPDATES

The social media campaign shouldered the majority of Visit Burbank communications during statewide Stay at Home orders, during which time the travel industry was reduced to a virtual standstill. Social posts were crafted to inspire future visits, to encourage outdoors activities, and were paired with citywide initiatives highlighting the latest safety measures, hotel updates for essential travel, takeout/delivery services, and new businesses.

THE LATEST burbank articles



GREAT DAY-TRIPS FROM BURBANK



EXPLORE BURBANK'S UNIVERSAL STUDIOS PARTNER HOTELS



CELEBRATE NATIONAL TRAVEL & TOURISM WEEK WITH A TRIP TO BURBANK

LOOKING AHEAD | MARKETING & SALES

Visit Burbank foresees a return to pre-pandemic advertising campaigns in 2022, modified to accommodate new travel realities resulting from public health concerns.

BUDGET

Anticipated to grow with increases in hotel occupancy

SIX-MONTH STRATEGIES

Allowing for flexibility in the face of evolving travel sentiment in the US and abroad

DIGITAL CAMPAIGN

Phased Campaign, Influencers, FAM Tours

EXPANDED GEOGRAPHICAL REACH

As international travel resumes

NEW PROGRAMS

Opening up with the return of business travel, group sales, media visits, and FAM tours. The advertising plan for the period January 1, 2022, through June 30, 2022 will encompass:

CONTINUED POSITIONING

With A Better Way to See LA messaging

MEDIA TOOLS

Concentrated on Google Display, Google Search, and Social Media Advertising

GEO-TARGETING

Road Trip Markets, Nonstop Flight Markets, and Canada

MEDIA AND TRAVEL TRADE

Visit Burbank attended US Travel's IPW (International Pow Wow) trade show in Las Vegas on September 18 to 22, 2021. The trade show was widely perceived as the premier event to regenerate the international and domestic travel industry.

RESULT

Met with **28** tour operators of which **15** domestic or significant US presence

- 4** OTAs including Expedia, Groupon Getaways, and Priceline
- 4** Airlines including three interested in including Burbank properties
- 10** Media, domestic, and international
- 7** Other including point system, leisure pass, and BrandUSA

53 Appointments Total

As markets open and momentum rebuilds, other travel trade shows are on the horizon.



LOOKING AHEAD | SUPERHERO SELFIE SPOTS

The bronze Batman statue located in Downtown Burbank was the first in a series of monumental sculptures created in partnership with Burbank-based DC Comics and unveiled on November 2020 to worldwide media coverage and acclaim. Next up in 2022 will be a statue of Wonder Woman, located near the new Warner Bros Tour Center in Burbank's Media District.

BATMAN LAUNCH RESULTS

5.1M Total Impressions

4M Total Reach

473K Total Engagements

314K Total Likes

2.8K Total Comments

14K Total Shares



LOOKING AHEAD | STRATEGIC PARTNERSHIPS

Visit Burbank is sponsoring three targeted special events in 2021-2022 demonstrating potential for boosting overnight stays and contributing to citywide economic activity.



The CTN Animation eXpo + CTN-LIVE

Nov 15-21, 2021 | Los Angeles Marriott Burbank Airport Hotel

An artist-to-artist conference geared to inspiring, empowering, and connecting animators from around the world.

- 12 years in Burbank
- Pre-COVID Attendance: 10K
- Projected Attendance 2021: 1K, with heavy online participation
- Projected 2021 Room Nights: 1.2K



MUSEXPO and California Entertainment Week

March 20-25, 2022 | The Castaway

One of the world's leading music business and conferences showcasing all facets of pop culture.

Attracts leaders, thinkers, and influencers from across the globe that are shaping the future of the music industry.

- 2nd year in Burbank; previously in Hollywood
- Projected attendance: 1K
- Projected 2022 Room Nights: 600



Arts, Media & Entertainment Leadership Institute

June 20-22, 2022 | Kickoff event at Warner Bros. Studios with activities citywide

The largest annual professional convention of Arts, Media, and Entertainment educators and industry professionals in California.

- First year in Burbank; previously in San Diego
- Projected attendance: 400
- Projected room nights: 1.2K

PROJECTED RESULTS

- 3K** room nights generated (projected)
- \$441K** in new hotel revenue
(based on 2019-2021 daily rate average of \$147)
- 2K** in added visitation to Burbank

DESTINATION DEVELOPMENT | ONEBURBANK

Visit Burbank funded the participation of ten hotels in Burbank Water & Power's ONEBurbank high-speed fiber internet service, enhancing the internet access/experience for hotel guests.



RESULT

- 10** Participating Hotels
- Enhanced hotel guest experience
- Demonstrated Hi-tech Leadership as Media Capital of the World



LOOKING AHEAD | TRAVEL MARKET TRENDS

The COVID pandemic brought numerous travel challenges, but also opened unforeseen marketing opportunities. Here's a rundown of improvements currently enriching the Burbank visitor landscape.

New Airlift into BUR

Hollywood Burbank Airport added three new carriers during the pandemic, with Avelo Airlines selecting BUR as operations base for its entire West Coast network. Consequently, nonstop flights into Burbank lifted routes from 17 in the pre-pandemic era to more than 30 today, opening up new marketing opportunities for Visit Burbank.



AVELO AIRLINES

- First new US airline in 15 years
- Introduced 10 new nonstop destinations:
 - Tucson, Arizona
 - Eureka/Arcata, Sonoma/Santa Rosa, Redding, California
 - Denver/Fort Collins, Colorado
 - Bend/Redmond, Eugene, Medford/Rogue Valley, Oregon
 - Salt Lake City/Ogden, Utah
 - Pasco Tri-Cities, Washington

FRONTIER AIRLINES

- Relocated flights out of LAX into BUR
- Brought three nonstop destinations:
 - Denver, Colorado, Las Vegas, Nevada, and Phoenix, Arizona

FLAIR AIRLINES

- Carrier introducing two nonstop flights out of Canada
- Vancouver flights begin November 21, 2021; Edmonton starts December 16



Warner Tour Center and Enhanced Warner Bros. Studio Tour Hollywood

Warner Bros. Studio Tour Hollywood unveiled the new Welcome Center on June 26, 2021, complete with experiences like the Storytelling Showcase, Stage 48: Script to Screen, DC Super Heroes and Villains, Harry Potter and Fantastic Beasts, Action and Magic Made Here, and a brand-new Warner Bros. Studio Store accessible to the general public.



Hotel Amarano Burbank-Hollywood Renovation

Hotel Amarano Burbank-Hollywood underwent a multi-million dollar renovation in early 2021 to reemerge as Los Angeles' newest luxury boutique hotel following a full-scale transformation of its lobby, public areas, guestrooms, meeting & event spaces, and a new bar and restaurant.



LOOKING AHEAD | INVESTMENTS IN TOURISM



Approved
CAMBRIA HOTEL
Cambria Hotel with 150 rooms, along with a ground level bar, fitness center, and meeting rooms.



Approved
LATERRA SELECT BURBANK
573 apartments, 307 room hotel, and 30,000 square foot transit plaza.
Opening 2023-2025



Approved
WARNER BROS. SECOND CENTURY PROJECT
800,000 square feet of office space.
Frank Gehry Design
Opening 2023



Proposed
AERO CROSSING
Mixed Use Project
2311 N. Hollywood Way
Project includes the construction of housing units, commercial/retail space, as well as office space.
Status: TBD



Approved
AIRPORT REPLACEMENT TERMINAL
355,000 sq. ft. Replacement Terminal, 14 gates.
Opening 2024



Proposed
ALOFT and RESIDENCE INN HOTELS
219-room Aloft Hotel and 201-room Residence Inn.
Burbank City Council consideration 2021

HOTEL OCCUPANCY

Occupancy continued to be effected by travel bans, Stay at Home orders, reduced air service, and the closure of major attractions for the majority of 2020-2021. Travel made its comeback once the Governor lifted the Blueprint for a Safer Economy executive orders on June 15, 2021. Consequently, all numbers were impacted during the period.

GROWTH IN HOTEL OCCUPANCY (As of October 2021)



| 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Average Since 2012 |
|------|------|------|------|------|------|-------|-------|---------|-------|--------------------|
| 75% | 78% | 79% | 81% | 84%* | 83% | 82.5% | 82.5% | 66.5%** | 67.4% | 70% |

GROWTH IN AVERAGE DAILY RATES (ADR) (As of October 2021)



| 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Average Since 2012 |
|-------|-------|-------|-------|--------|-------|-------|-------|---------|-------|--------------------|
| \$118 | \$123 | \$134 | \$148 | \$170* | \$161 | \$162 | \$164 | \$157** | \$141 | \$148 |

GROWTH IN REVENUE PER AVAILABLE ROOM (RevPAR) (As of October 2021)



| 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Average Since 2012 |
|------|------|-------|-------|--------|-------|-------|-------|---------|------|--------------------|
| \$89 | \$95 | \$105 | \$120 | \$142* | \$133 | \$133 | \$136 | \$104** | \$95 | \$115 |

GROWTH IN ANNUAL ROOM REVENUE (As of October 2021)



| 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Average Since 2012 |
|-------|-------|-------|-------|---------|--------|--------|--------|---------|---------|--------------------|
| \$72M | \$76M | \$85M | \$92M | \$127M* | \$126M | \$127M | \$128M | \$97M** | \$75.4M | \$100M |

***Porter Ranch Impacts.** The gas leak forcing thousands of residents to relocate from Porter Ranch in the northwest San Fernando Valley benefited Burbank hotels from approximately October 2015 to May 2016. However, the relocation was an abnormal event that skewed economic indicators by approximately 10% in the following year, when effects began to be felt. That explains the slight declines in 2017, but if looked at over 2015, the underlying upward trend is apparent.

****Impacted by consequences of COVID Pandemic starting in March 2020, and continuing to June 15, 2021.**

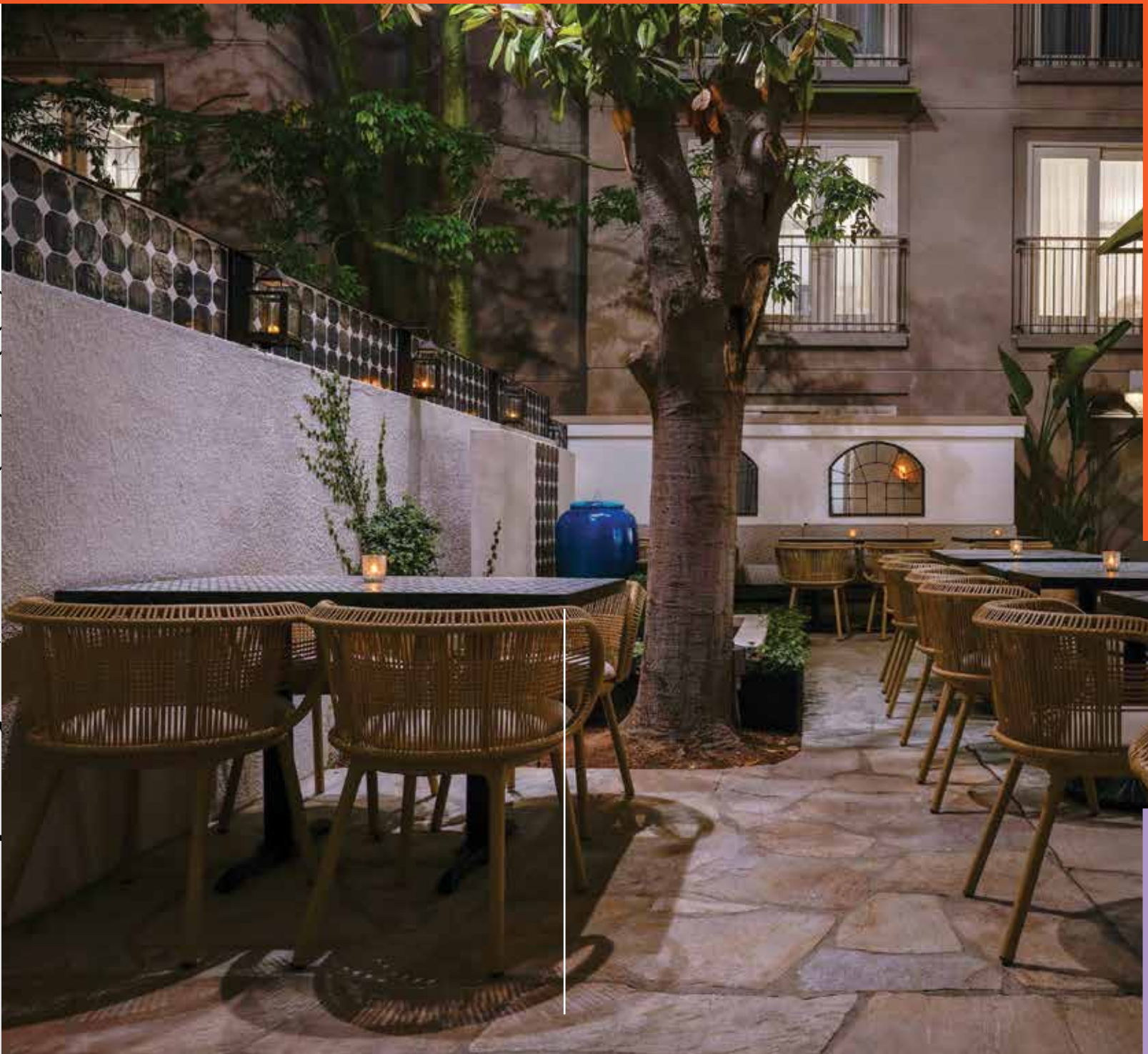
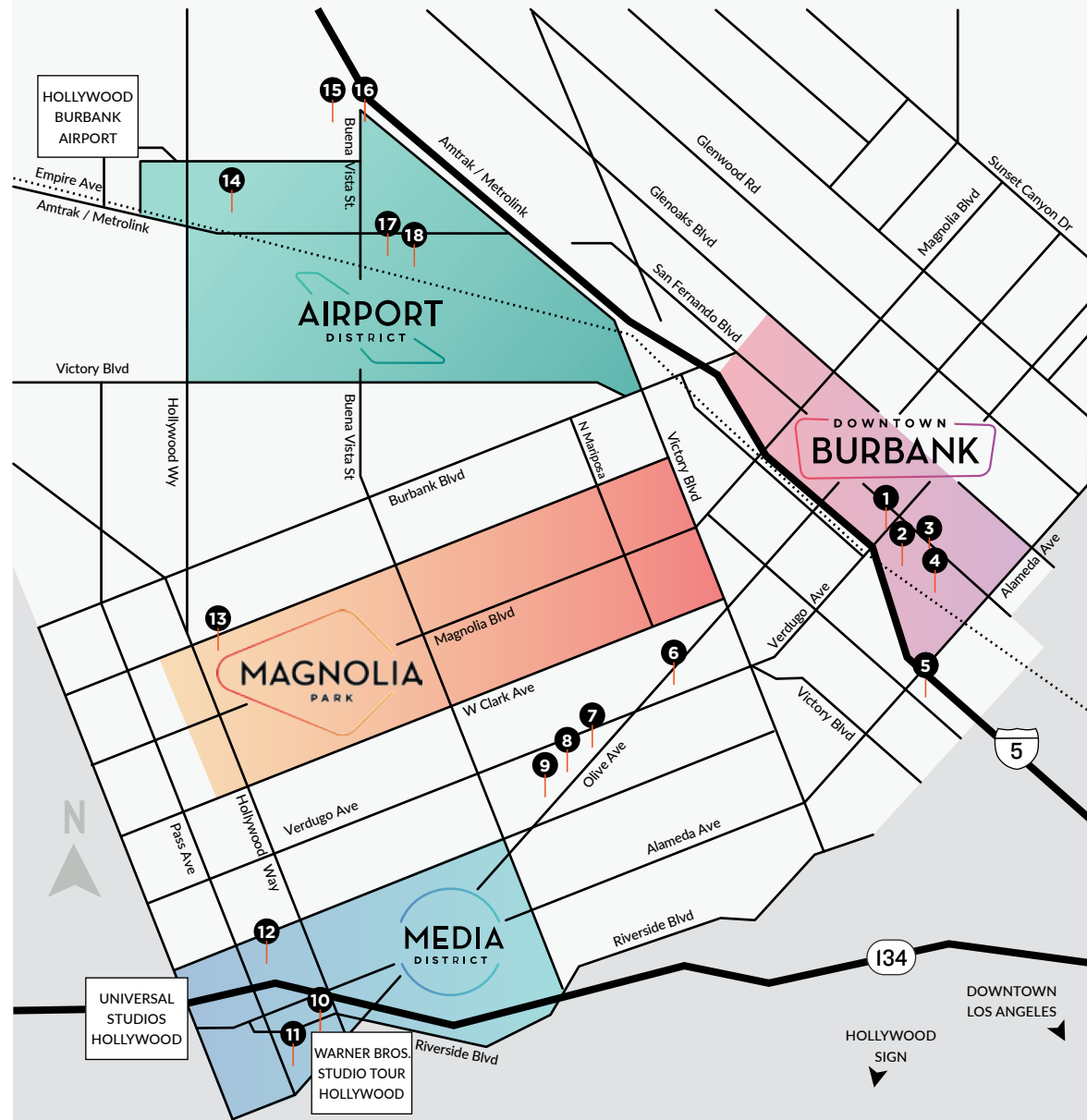
Source: Smith Travel Research



BURBANK HOTELS

- Holiday Inn Burbank Media Center **1**
- Residence Inn Los Angeles Burbank/Downtown **2**
- Hilton Garden Inn Burbank Downtown **3**
- SpringHill Suites Los Angeles Burbank/Downtown **4**
- Burbank Inn & Suites **5**
- Portofino Inn Burbank **6**
- Safari Inn **7**
- Coast Anabelle Hotel **8**
- 2021 Olive **9**
- The Tangerine **10**
- Best Western Plus Media Center Inn & Suites **11**
- Hotel Amarano Burbank-Hollywood **12**
- Travelodge by Wyndham Burbank-Glendale **13**
- Los Angeles Marriott Burbank Airport Hotel **14**
- Ramada by Wyndham Burbank Airport **15**
- Quality Inn Burbank Airport **16**
- Courtyard by Marriott Los Angeles/Burbank Airport **17**
- Extended Stay America Los Angeles Burbank Airport **18**

18 Hotels
2,569 Rooms



BOARD OF DIRECTORS

EXECUTIVE COMMITTEE

- Danny Kahn** Chair | Warner Bros. Studio Tour Hollywood
- Alan Tate** Vice-Chair | Los Angeles Marriott Burbank Airport
- Eric Ducat** Secretary | Residence Inn Burbank Downtown
- Sundeep Vaghashia** Treasurer | Travelodge by Wyndham Burbank-Glendale

BOARD OF DIRECTORS

- Richard Englehard** Hilton Garden Inn Burbank Downtown
- Tony Garibian** Coast Anabelle and Safari Inn
- Jamie Keyser** Burbank Chamber of Commerce
- Peter Kolla** Hotel Amarano Burbank-Hollywood
- Adrian Pastrana** Quality Inn Burbank Airport
- Ali Schmidt** Universal Studios Hollywood
- Nerissa Sugars** Hollywood Burbank Airport
- Patrick Prescott** Community Development Director (ex-officio)

STAFF

- Simone McFarland** Assistant Community Development Director-Business & Economic Development
- Mary Hamzoian** Economic Development Manager / Executive Director
- Megan Anghel** Economic Development Analyst
- Marissa Minor** Economic Development Analyst

PROUD PARTNERS





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