



# Brand USA Board of Directors Meeting

April 15, 2022



# Board Meeting Agenda

1:30pm - 3:00pm ET

## Opening remarks

- Call meeting to order
- Item 1: Approval of minutes from February 3, 2022 Board Meeting\*
- Item 2: CEO Report
  - FY2021 Annual Report
  - FY2021 Annual Partner Survey
  - Relief Funding Plan
- Item 3: Marketing Planning & Updates
  - FY2022 recovery engagement framework updates

## Financial Reporting

- Item 4: FY2022 Q2 financials

## Governance & Nominating Committee

- Recommendation
- BOD appointments
- Item 5: Future meetings schedule
  - Q4 FY2022 – July 26-27, 2022 – San Juan, PR
  - Q1 FY2023 – November 16-17, 2022 - Washington, DC (proposed)
  - Q2 FY2023 – April 2023 - Washington, DC (proposed)
  - Q3 FY2023 – July 2023 - Washington, DC (proposed)
  - Q1 FY2024 – November 2023 - Washington, DC (proposed)

## Open meeting for discussion & questions/comments

## Closing remarks and adjourn meeting

**\*Vote Required**

# Opening Remarks

**Alice Norsworthy**

Chair

Brand USA Board of Directors

## Call the Meeting to Order

- Brand USA Board of Directors
- Brand USA Executive and Senior Management

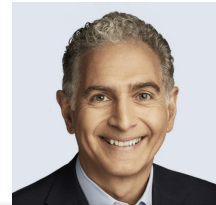
# Brand USA Board of Directors



**Alice Norsworthy**  
Chair



**Todd Davidson**  
Vice Chair



**Mark Hoplamazian**  
Treasurer



**Elliott Ferguson**  
Secretary



**Lauren Bailey**



**Kristen Esposito**



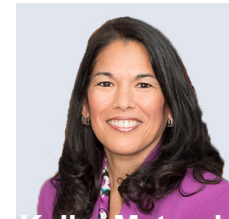
**Noel Irwin Hentschel**



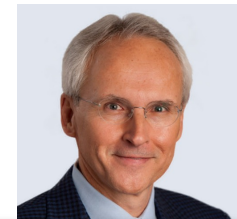
**K. Dean Kantaras**



**Donald Moore**



**Keiko Matsudo  
Orrall**



**Thomas O'Toole**

# Brand USA Executive and Senior Management



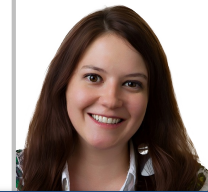
**Chris Thompson**  
President & CEO



**Tom Garzilli**  
Chief Marketing Officer



**Donald Richardson**  
Chief Financial Officer



**Cassidy Bailey**  
Vice President  
Partner Engagement  
& Marketing



**Aaron Wodin-Schwartz**  
Senior Vice President  
Public Affairs



**Jake Conte**  
Vice President  
General Counsel



**Mark Lapidus**  
Vice President  
Product & Technology



**Jessie Newcomb, CPA**  
Vice President  
Finance & Accounting



**Brian Watkins**  
Senior Director  
Information Technology



**Rosina Barbastefano**  
Senior Director,  
Research & Analytics



**Alexis Adelson**  
Director  
Marketing Operations &  
Special Projects

# Item 1

Alice Norsworthy

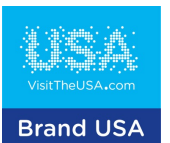
Chair

Brand USA Board of Directors

## Approval of the Minutes

- February 3, 2022 Board Meeting\*

**\*Vote Required**



## Item 2

Chris Thompson

President & CEO  
Brand USA

## CEO Report

- FY2021 Annual Report
- FY2021 Annual Partner Survey
- Relief funding



**ABOUT THIS REPORT**

Brand USA submits this report for Fiscal Year 2021 (FY2021) to the Secretary of Commerce to transmit to Congress as an update on the organization's progress, activities, financial condition, and accomplishments for the period October 1, 2020 through September 30, 2021.

SENECA ROCKS, WEST VIRGINIA

**CONTENTS**

- AND USA
- FROM THE CHAIR OF THE BOARD
- FROM THE PRESIDENT AND CEO
- AL ANALYSIS
- HIGHLIGHTS
- ONAL TARGET MARKETS, POPULATIONS, AND MEDIA CHANNELS
- TO PROMOTE TOURISM IN RURAL AND URBAN AREAS
- ES REVIEW
- FINANCIAL STATEMENTS AND NOTES
- CONTRIBUTIONS
- A LEADERSHIP AND BOARD OF DIRECTORS
- WITH US

# FY2021 Annual Report To Congress



- Transmitted each year to House and Senate committees of jurisdiction
- Captures the highlights, spirit, and results of Brand USA's activities from October 1, 2020 – September 30, 2021
- Single best encapsulation of how Brand USA stayed connected with our world of public and private stakeholders and global consumers and travel trade.
- Brand USA continued to inspire consumers the world over, add and create value for our partners, and drive results for the U.S. economy.



# BRAND USA PARTNER SURVEY

2021

USA  
VisitTheUSA.com

Brand USA

# Brand USA Annual Partner Survey

## 90% of partner satisfaction rating for 2021

### OBJECTIVES:

- Partners' evaluation of Brand USA's performance:
  - Evaluation of Brand USA's programs performance
  - Evaluation of partnership value

### ANALYSIS:

- 109 survey responses (34% response rate); collected between January 11 to March 8, 2022
- Results were analyzed by type of organization (DMO/CVB and others) and amount of contribution to Brand USA

*When notable, results are compared to surveys conducted since 2016.*

“Brand USA's efforts have never been more important. The return of international visitation is among the most critical components of our industry's recovery, and we're grateful for our ongoing partnership...”

**City DMO (\$1M)**

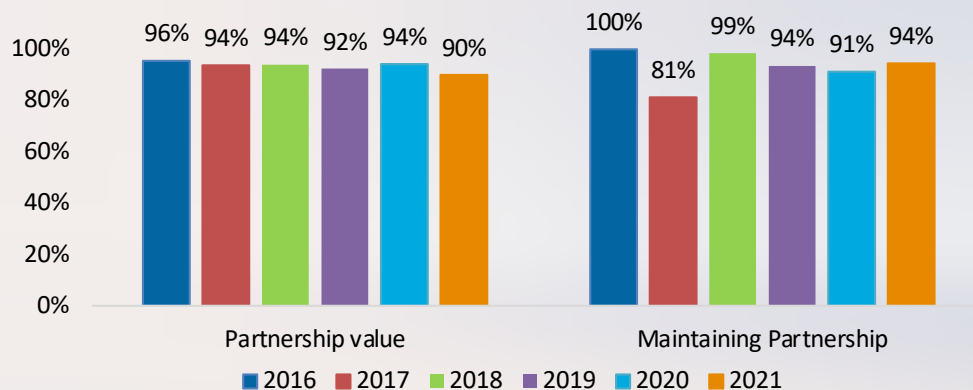


# Annual Partnership Perception and Performance Evaluation

Partnership Value and Maintaining Partnership have remained over 90% ratings for the past four years.

- Perception of Brand USA's partnership value increased among State DMOs and remained at a 100% among partners contributing \$1 million or above

**Perception of Brand USA  
(Top 2 boxes – Agree)**



*“Brand USA is vital to our country’s recovery. In many ways, their programs are valuable, and it isn’t easy to cater to all of the partner’s different needs.*

*In some ways, we find the most value by working with Brand USA as an uplift partner, managing our programs, and supporting as a partner in solidarity by contributing for the greater good of marketing visitation to the U.S., rather than participating in the traditional offerings.”*

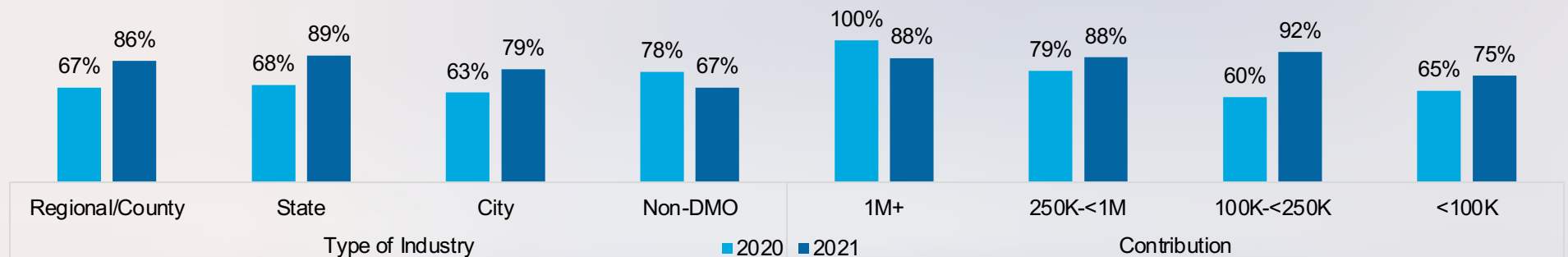
**State DMO (\$250K to less than \$500K)**

# Partners' Recovery

**“How much would you agree/disagree with the following statement: “Brand USA initiatives will be vital to my organization’s pandemic recovery?”**

- 83% of respondents perceive Brand USA as vital to their recovery, mainly among Regional and State DMO partners.

## **Perception of Brand USA’s initiatives as vital to the partners’ organization recovery (Top 2 boxes – Agree)**



A wide-angle photograph of the U.S. Capitol building in Washington, D.C., taken at dusk. The building's iconic dome is illuminated from within, casting a warm glow. The sky is a clear, deep blue. In the foreground, a large, rectangular reflecting pool captures the lights of the building and the sky, creating a clear reflection. The overall scene is serene and majestic.

# RESTORING BRAND USA ACT

USA  
VisitTheUSA.com

Brand USA

# Brand USA's Role in Travel and Tourism in the USA



PROMOTE

U.S.  
Travel &  
Tourism  
Industry

U.S. TRAVEL  
ASSOCIATION®

ADVOCATE



ADVISE

(Policy & Competitiveness)

# The \$250 Million Journey to this Point



**Seating of the new TTAB by  
Commerce Sec. Wilbur Ross**



**Secretary Raimondo supports  
recommendation on Capitol Hill**



**TTAB asked Brand USA for  
“breakthrough reach and relevance”  
needs (our white paper)**



**Mobilization of advocacy army led  
by U.S. Travel Association**



**TTAB policy recommendations sent  
to Commerce Sec. Gina Raimondo**



**Bipartisan Congressional support  
of Brand USA by passage of  
Restoring Brand USA**

# Pandemic Exposed Funding Vulnerability

**\$62 Million**

**Fiscal Year  
2021**

(Funds from FY20)

**\$13 Million**

**Fiscal Year 2022**  
(Funds from FY21)

**\$75 Million**

**Fiscal Year 2023**  
(*Estimated* funds from FY22)

**Available funds down \$150+ Million**

## \$250M in Funding—Bridge to the Future



# Relief Funding Plan to Congress

## SECTION 1. SHORT TITLE.

This Act may be cited as the ``Restoring Brand USA Act''.

## SEC. 2. AVAILABILITY OF TRAVEL PROMOTION FUND FOR BRAND USA.

(a) In General.--Not later than 30 days after the date of the enactment of this Act, the Secretary of the Treasury, subject to subsections (b) and (c), and notwithstanding any other provision of law, shall make available, from unobligated balances remaining available from fees collected before October 1, 2020, and credited to Travel Promotion Fund established under subsection (d) of the Travel Promotion Act of 2009 (22 U.S.C. 2131(d)), \$250,000,000 for the Corporation for Travel Promotion (commonly known as ``Brand USA'').

(b) Inapplicability of Certain Requirements and Limitations.--The limitations in paragraph (2)(B) of subsection (d) of such Act shall not apply to amounts made available under subsection (a), and the requirements set forth in paragraph (3) shall not apply to more than \$50,000,000 of the amounts made so available.

(c) Use of Funds.--The Corporation may only use funds provided under subsection (a) to promote travel from countries the citizens and nationals of which are permitted to enter into the United States.

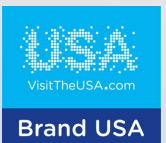
(d) Report Required.--Not later than 60 days after the date of the enactment of this Act, Brand USA shall submit to Congress a plan for obligating and expending the amounts described in subsection (a).

Calendar No. 220

117th CONGRESS

1st Session

- Brand USA will submit a plan to Congress for allocating relief funding by May 15
- The plan is a framework that will guide Brand USA's decision making over the next 2.5 – 3 fiscal years and provide a bridge back to normal operations
- Each fiscal year will have its own detailed business plan with marketing objectives and budget AND annual report to Congress
- The framework includes: methodology for market and channel selection; typical programs; and more
- The legislation does not affect Brand USA's underlying mission and funding model



## FY 2022 Budget Scenario Assumptions

- Congress has passed \$250M in Federal Relief Revenue for Brand USA on a bipartisan basis to help lead the recovery of international travel.
- For planning purposes, we assume \$200M of the funds will be received April 2022; the funds will remain available until expended.
- \$50M of the funds will require matching and we expect to receive these funds in FY 2023 once matched.
- Breakdown of the \$250M over three fiscal years:
  - Relief Spend: \$40.5M in FY 2022, \$139.5M in FY 2023, \$70.0M in FY 2024

FY 2022 Expense Budget				
Scenario	Readiness Spend	Recovery Spend	Federal Relief Spend	Total
Board Approved Budget	\$ 23,120,000	\$ 53,780,000		\$ 76,900,000
Proposed Budget w \$250M Federal Relief Funds	\$ 23,120,000	\$ 53,780,000	\$ 40,503,259	\$ 117,403,259

# FY 2022 Budget Federal Relief Scenario Comparison\*

FY 2022 Expense Budget						
Department	Current Approved Budget	% Total	Proposed Budget w \$250M Federal Relief	% Total	Increase	% Total
Operations	6,902,359	9%	8,150,000	7%	1,247,641	3%
Public Affairs	1,383,468	2%	2,500,000	2%	1,116,532	3%
<i>Marketing Overhead</i>	4,663,906	6%	5,000,000	4%	336,094	1%
<i>Integrated / Consumer Marketing</i>	13,184,000	17%	35,225,000	30%	22,041,000	54%
<i>Partner Marketing Services</i>	41,688,267	54%	48,878,259	42%	7,189,992	18%
<i>Global Trade Development</i>	5,078,000	7%	10,500,000	9%	5,422,000	13%
<i>Market Research</i>	2,000,000	3%	3,000,000	3%	1,000,000	2%
<i>Global Communication (PR)</i>	2,000,000	3%	4,150,000	4%	2,150,000	5%
Marketing Department Sub-total	68,614,173	89%	106,753,259	91%	38,139,086	94%
<b>Totals</b>	<b>76,900,000</b>	<b>100%</b>	<b>117,403,259</b>	<b>100%</b>	<b>40,503,259</b>	<b>100%</b>

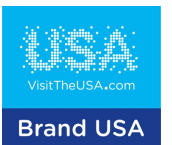
\*Vote required

## Item 3

Tom Garzilli

CMO  
Brand USA

## CMO Update



# FY2021-2022 Framework



VisitTheUSA.com



**State of  
Readiness**



**Gating  
Criteria**



**Recovery**



VisitTheUSA.com

**Brand USA**

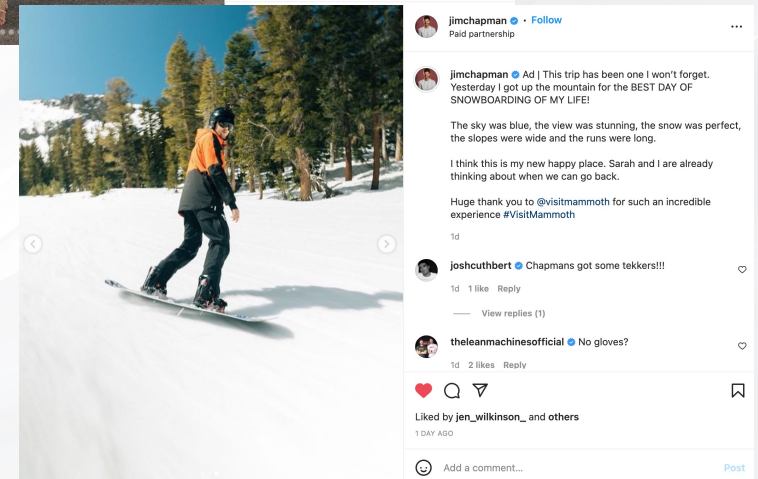
# United Stories Strategic Framework





# COMMS TASK #1: Prove We're Ready

## INFLUENCER PROGRAM UPDATE



# INFLUENCER PROGRAM:

## Results To-date

<b>Trips</b>	<b>Influencers</b>	<b>Posts</b>	<b>Reach</b>	<b>Impressions</b>	<b>Media Value</b>
<b>9</b>	<b>26</b>	<b>1.2k</b>	<b>9.6M</b>	<b>186M</b>	<b>\$4.6M</b>



# COMMS TASK #2: Welcome the World Back

## UNITED STORIES UPDATE

Telling stories of **multi-state road trips** with a focus on connections and amplifying **many voices**

**Next Step: integrate new productions into our media plan for the rest of FY22**

## 9 United Stories Production trips complete:

- Northeast
- Great Lakes
- Mississippi + Arkansas
- Pacific Northwest
- West Virginia + Pennsylvania
- Iowa, Nebraska, Kansas
- California + Nevada
- Walt Disney World* Resort in Florida
- San Antonio

## 2 trips planned for May:

- Palm Springs
- Anchorage, Alaska Photography Trip



# COMMS TASK #3: Entice and Convert

TOUR OPERATOR  
PROGRAM

- Campaigns with Trailfinders, British Airways Holidays, and Canusa completed in Q2
- Combined results for both social and SEM across all 3 flights:  
122M Impressions  
320K Link Clicks



# Next Phase:

- Objective: leverage United Stories and Influencers across all three comms tasks: Prove We're Ready, Welcome the World Back, and **Entice and Convert**.
- Drive bookings by targeting consumers with sequential messaging that will move them from inspiration to consideration to conversion.

## 5 New United Stories Production:

- Integration of Insider Guides itineraries
- Regional approach, covering multiple states
- Deliverables will include assets for tour operators

## 3 Influencer Program Integrations

- Partner Program
- Marriott Partnership
- Insider Guides Itineraries with Tour Operators



# Stakeholder Amplification

**Build and  
maintain  
connections**



**Provide  
foundational  
support**

# January – March Partner Programs Snapshot



**266** total activities



**87** unique  
partners engaged



Across **19** markets



# Spring Preview: Multi-Channel Program

## Partners Featured by Market



11 Partners



4 Partners



75 Partners



5 Partners



14 Partners

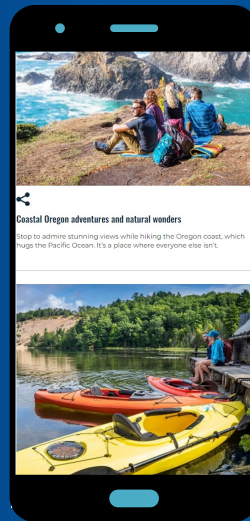


5 Partners

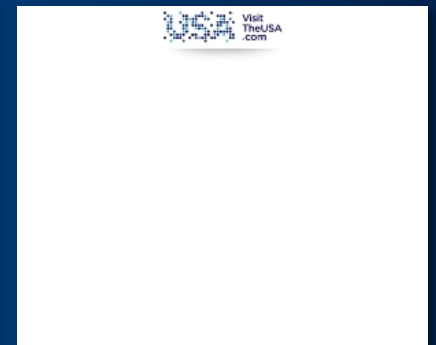


9 Partners

## NEW Platform Launching this Spring: Interactive Travel Guide



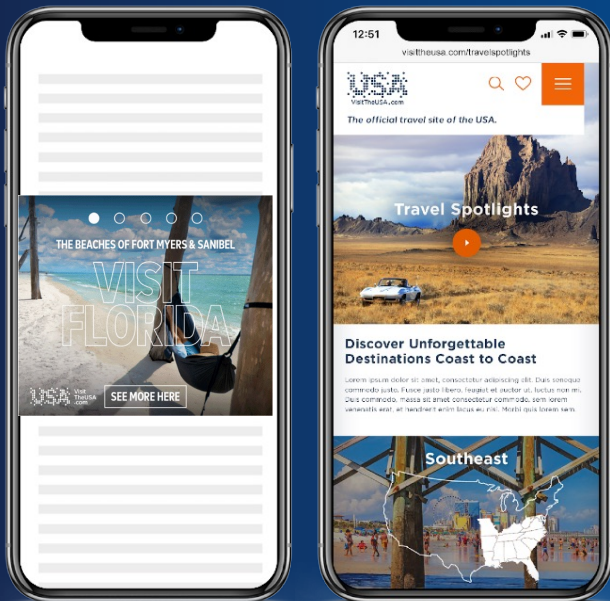
Targeted Programmatic  
Media Campaign



Google Display Network  
Campaign

# Spring Preview: Global Inspiration Program

97 Partners Featured Across 14 Markets and 16 Language Sites



NEW Digital Hub and Expanded Reach –  
300% Increase in Digital Media Impressions



Reimagined Itinerary-Focused Print Guide in 6 Language Editions



# TRADE ACTIVITY: Jan-Mar

- **Educational Webinars**
  - Agents trained: 2,914
- **USA Discovery Program Incentives**
  - Agents: 506; badges completed: 484
- **2 One-to-One Business Meetings Events on Brand USA Global Marketplace**
  - U.K. & Europe
  - The Americas
- **4 Trade Show Events**
- **1 Partner Activation**



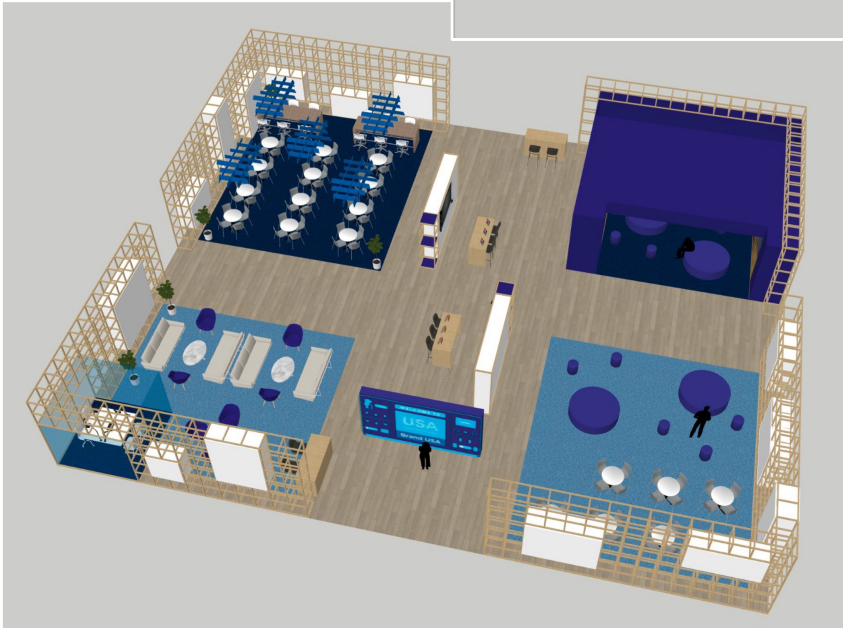
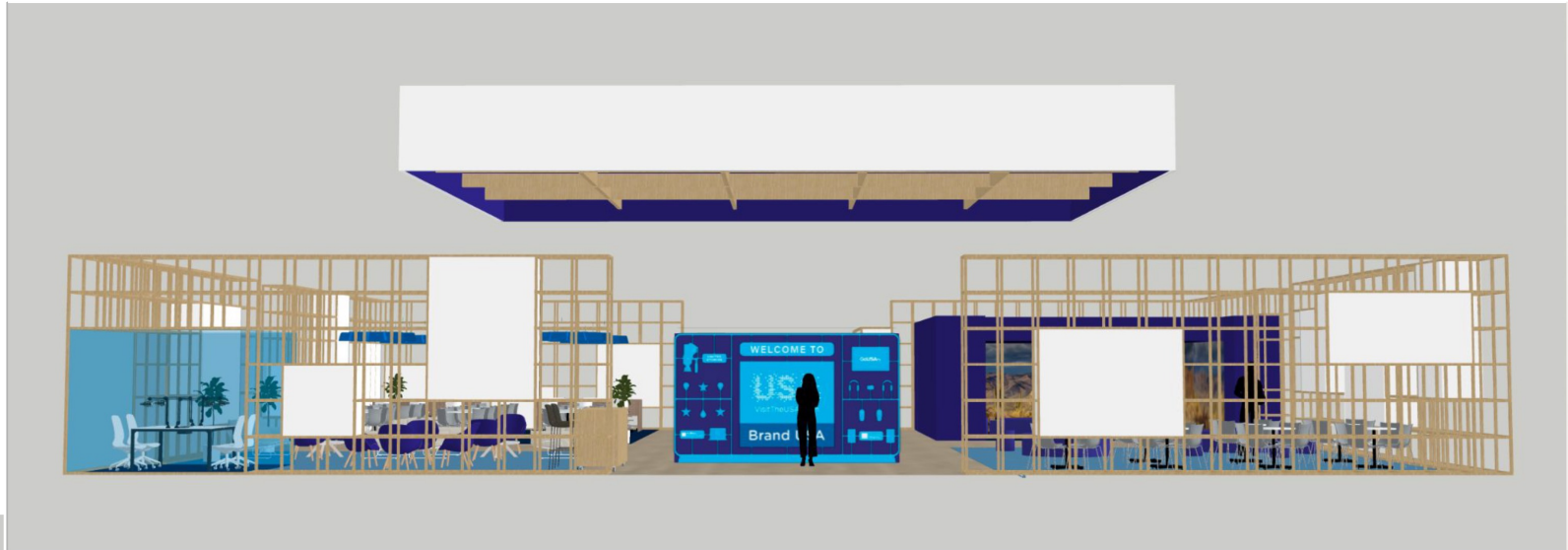
# IPW Preview

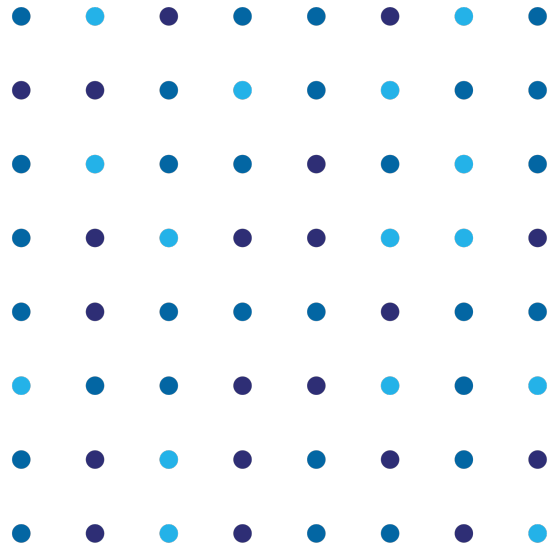


**This year's "biggest stage, brightest lights" takes on new importance in light of the reopening of borders and reentry to international markets**

Major programming moments for stakeholders, partners, travel trade, and media

- Education session
- Press conference
- Media Marketplace and press brunch
- Chairman's Circle Honors
- Luncheon
- Travel trade and domestic partner meetings
- Federal Row
- More





# BRAND USA TRAVEL WEEK



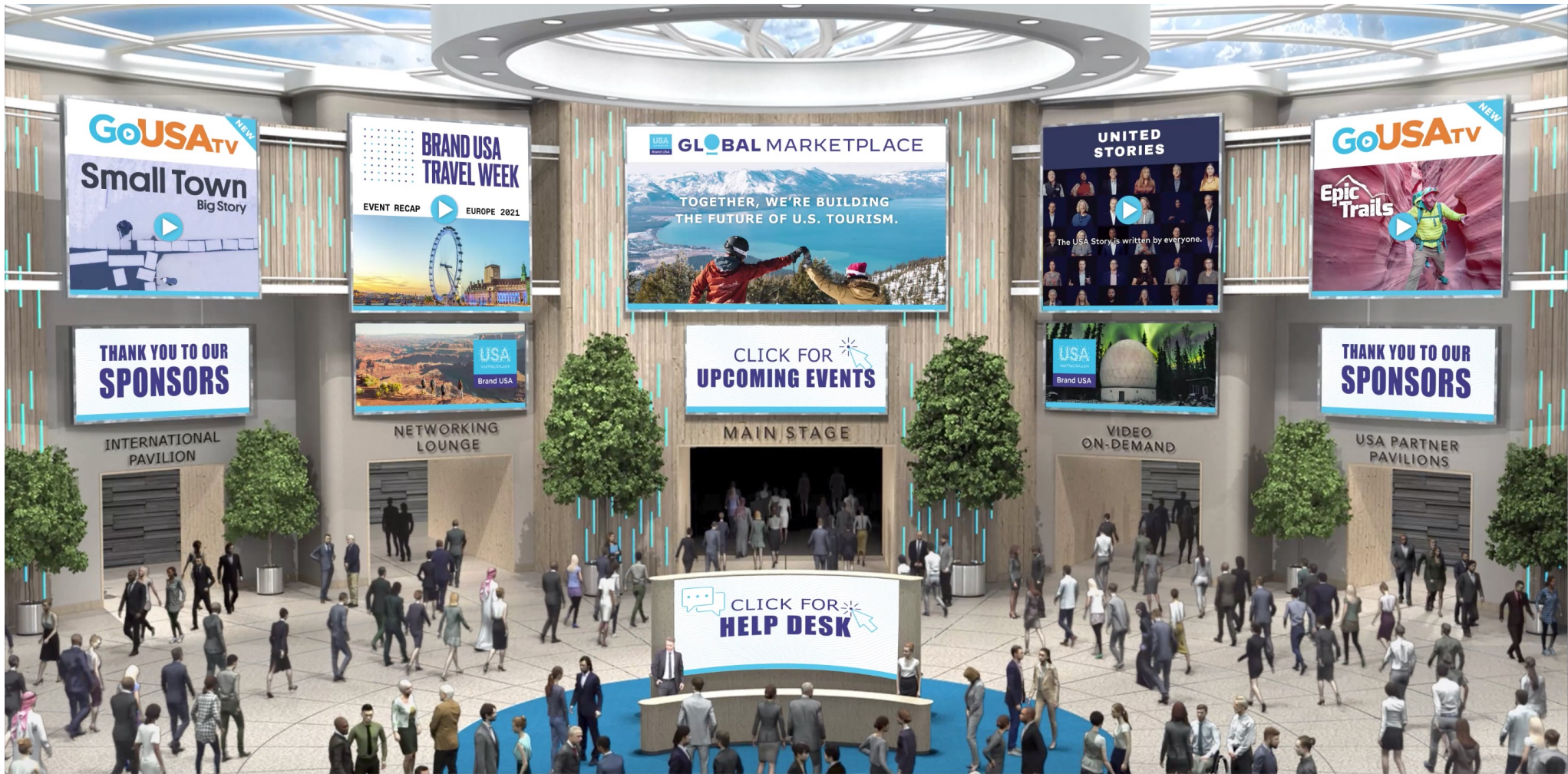
U.K. & EUROPE 2022



SEPTEMBER 26-29 | ALTE OPER | FRANKFURT



# GLOBAL MARKETPLACE





**GLOBAL MARKETPLACE**

## **BRAND USA GLOBAL MARKETPLACE ACTIVITY: FEBRUARY – APRIL 2022**

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**February 17**

**Latin America Market Update**

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**February 24**

**Canada Market Update**

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**March 3**

**Mexico Market Update**

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**March 9**

**Brazil Market Update**

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**March 16 & 17**

**1:1 Americas Business Meetings**

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# GLOBAL MARKETPLACE INTERNATIONAL PAVILION

LAUNCHED	UPCOMING SPRING-SUMMER 2022	UPCOMING FALL 2022
U.K.	Brazil	Canada
Germany	Mexico	China
Ireland	Italy	
France	Spain	
Australia/NZ	Benelux	
India	Nordics	
	Japan	
	South Korea	

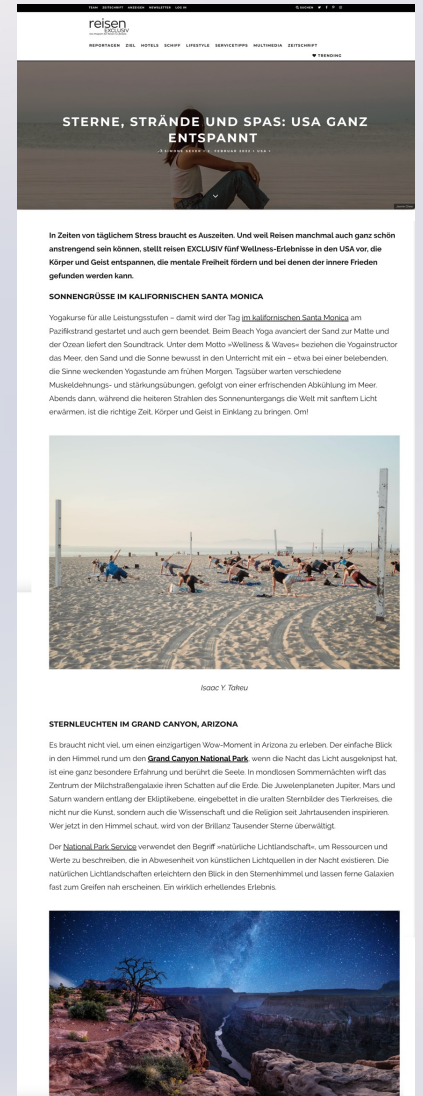


## Earned Media Initiatives

- Creation of five international storytelling pillars: **wellness, the great outdoors, local community initiatives, nostalgia** and **sports tourism**
- Identified by taking into account the key focuses of our stakeholders, conversations with international senior editors as well as in-market intel and trend reports
- Allow Brand USA to control the narrative as well as ensuring globally consistent messaging with local nuances

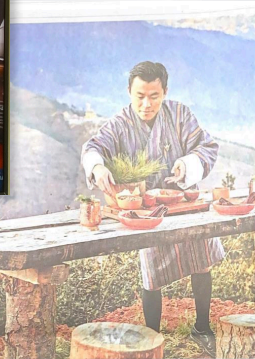
# Snapshot of International Earned Media Coverage

prima





# Snapshot of Brand USA / U.S. Partner Coverage



## The Telegraph

### 15 of the world's best holidays for foodies

From the delightful European region home to olive oil, truffles and wine (no, it's not Italy), to the best barbecue in the USA...

By Hannah Summers, TRAVEL WRITER  
18 March 2022, 7:00pm



A cooking class at Atlix in Mexico. © 2022, iStockphoto

For all our differences across the world, a love of food is something that has the special power to unite us. We may not speak the same language, or have anything in common, but wherever you go, everyone recognises the "mummmmm" sound when you taste something delicious. It's what we tell our friends about when we get home; it's what makes so many of us travel. Because food isn't just a good meal: it can help you uncover the history of a city, or introduce you to some of the most memorable people on your trips - from up-and-coming chefs to grandmas serving decades-old family recipes in tiny kitchens.

So to truly get under the skin of a destination, loosen up that belt buckle and eat. From the birthplace of pizza to steaming bowls of adobo, via the world's hottest chillies, here are 15 of the best places and trips to do just that.

### Pizza paradise

#### Italy

Granted, there are prettier Italian cities, but if you're charmed by grit and serious about pizza, then take a trip to its birthplace, Naples. Perfect dough laden with mozzarella and a steal at a few euros) makes Sorbillo a front-runner. Switch up the carbs and head to the Lungomare waterfront for spaghetti vongole - and don't miss the diavolatta riccia pastries, stuffed with locally made ricotta and candied orange. Walk it all off in one of the city's excellent museums.

Three nights at the four-star San Pietro costs from £197pp with Last Minute (0847 1277 1070; lastminute.com)



# NEW PODCAST: Brand USA Talks Travel

LAUNCHED IN NOVEMBER, 2021

To-date: **21 episodes**

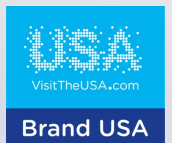
Downloads since  
November 9<sup>th</sup> launch

**1,824**  
(3x growth since  
last quarter)

Unique listeners

**1,077**  
(3x growth since  
last quarter)

**FY22 TARGET GOALS:**  
**3,000 downloads**  
**600 unique listeners**



## Item 4

**Mark Hoplamazian**  
Treasurer

**Donald Richardson**  
Chief Financial Officer

## Financial Reporting

- FY2022 Q2 financials

## FY 2022 Q2 Preliminary Financials: Highlights

(As of February 28, 2022)

- Partner Revenue

Total partner revenues YTD through February 2022 were \$9.2M.

- Partner Cash Contributions – we received \$8.7M in partner contributions.
- Partner Programs – we received \$0.5M of Sponsorship revenue and Partner Programs.

- Expenses

- Expenses YTD through February 2022 were \$22.1M.

## Item 5

**Jake Conte**

VP, General Counsel

## Governance & Nominating Committee

- Board appointments & reappointments
- Alice Norsworthy - Attractions or Recreation Sector - not eligible for reappointment
- Tom O'Toole – Passenger Air Sector - not eligible for reappointment
- Don Moore - Land or Sea Transportation Sector - eligible for reappointment
- Dean Kantaras - Immigration Law and Policy - eligible for reappointment
- Applications are due to the National Travel and Tourism in response to a Federal Register Notice that is usually published in June

## Item 6

**Alice Norsworthy**

Chair

Brand USA Board of Directors

## Future Meetings Schedule

- Q4 FY2022 – San Juan, PR
  - July 26-27, 2022
- Q1 FY2023 – Washington, DC
  - November 16-17, 2022 (proposed)
- Q2 FY2023 – Washington, DC (proposed)
  - April, 2023
- Q3 FY2023 – TBD
  - July, 2023
- Q1 FY2023 – Washington, DC (proposed)
  - November, 2023

A scenic photograph of the Washington Monument in Washington, D.C., viewed from across the Tidal Basin. The monument is a tall, white, obelisk-shaped structure that rises prominently in the background. In the foreground, a dense line of cherry blossom trees in full bloom, displaying vibrant pink and white flowers, stretches across the middle ground. People are visible walking along the paths between the trees. The sky is a mix of blue and soft orange/pink hues, suggesting a sunset or sunrise. The water in the Tidal Basin reflects the monument, the trees, and the colorful sky.

# QUESTIONS & ANSWERS

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# CLOSING REMARKS

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THANK YOU



CONSUMER

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TRAVEL INDUSTRY

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GoUSA