Board Meeting Agenda
1:00 - 2:00pm

Opening remarks
- Item 1: Approval of minutes from July 29, 2020 Board Meeting*
- Item 2: CEO report
  - Navigating the COVID-19 Pandemic
  - Q4 FY2020/Q1 FY2021 Accomplishments
  - Brand USA Global Marketplace/Travel Week Europe 2020 results

Marketing Strategies/Accomplishments
- Item 3: Q4 FY2020/Q1 FY2021 Accomplishments
- Item 4: FY2021 Business planning
  - State of readiness
    - Brand USA Global Marketplace
    - Brand USA Travel Week Europe 2020
  - Gating events & criteria
  - Re-entry/recovery planning

Finance Committee
- Item 5: FY2020 Q4 & year-end financials

Governance and Nominating Committee
- Item 6: FY2021 Board of Directors appointments
  - Official of State Tourism Office
    - John Edman not eligible for reappointment
  - Small Business or Retail Sectors
    - Mike Gallagher eligible for reappointment
  - Travel Distribution Services Sector
    - Noel Irwin Hentschel eligible for reappointment
- Item 7: FY2021 Board of Directors leadership and committees*
- Item 8: Future meetings schedule
  - Q2 FY2021 – March 1-2, 2021, Washington, DC
  - Q3 FY2021 – May 19-20, 2021, Washington, DC

Open meeting for discussion & questions/comments

Closing remarks and adjourn meeting

*Vote Required
Opening Remarks

Call the Meeting to Order

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

John Edman
Chair
Brand USA Board of Directors
Brand USA Board of Directors

John Edman  
Chair

Mark Hoplamazian  
Vice Chair

Alice Norsworthy  
Vice Chair

Kyle Edmiston  
Treasurer

Paul Brown

Todd Davidson

Mike Gallagher

Noel Irwin Hentschel

K. Dean Kantaras

Donald Moore

Thomas O’Toole
Brand USA Executive and Senior Management

Chris Thompson
President & CEO

Tom Garzilli
Chief Marketing Officer

Donald Richardson
Chief Financial Officer

Karen Grueenberg
Senior Vice President
Partner Marketing & Strategic Alliances

Aaron Wodin-Schwartz
Senior Vice President
Public Affairs

Jake Conte
Vice President
General Counsel

Jackie Ennis
Vice President
Global Trade Development

Tracy Lanza
Senior Vice President
Integrated Marketing

Joann Pelipesky
Vice President
Human Resources & Administration

Carroll Rheem
Vice President
Research & Analytics

Brian Watkins
Director
Information Technology
Item 1

John Edman
Chair
Brand USA Board of Directors

Approval of the Minutes

- July 29, 2020 Board Meeting*

*Vote Required
CEO Report

- Navigating the COVID-19 Pandemic
- Q4 FY2020/Q1 FY2021 Accomplishments
- Brand USA Global Marketplace/Brand USA Travel Week Europe 2020 results

Chris Thompson
President & CEO
Brand USA
Items 3-4
Marketing Strategies/Accomplishments

Tom Garzilli
Chief Marketing Officer

Karyn Gruenberg
SVP, Partner Marketing & Strategic Alliances

Tracy Lanza
SVP, Integrated Marketing

Aaron Wodin-Schwartz
SVP, Public Affairs

Carroll Rheem
VP, Research & Analytics

Jackie Ennis
VP, Global Trade Development

Marketing Strategies/Accomplishments

- Q4 FY2020/Q1 FY 2021 Accomplishments
- FY2021 Business Planning & Activation
  - Maintaining a State of Readiness
    - Brand USA Global Marketplace
    - Brand USA Travel Week Europe 2020
  - Gating Events & Criteria
  - Re-entry/recovery planning
Item 3

Tom Garzilli
Chief Marketing Officer

Aaron Wodin-Schwartz
SVP, Public Affairs

Tracy Lanza
SVP, Integrated Marketing

Q4 FY2020/Q1 FY2021 Accomplishments
Q4 FY2020/Q1 FY2021 Major Initiatives

Tracy Lanza
SVP, Integrated Marketing
Brand USA
On September 24th, Brand USA and Airbnb announced a new partnership designed to allow guests to explore the USA from the comfort of home.

Along with a new landing page that showcases the unique possibilities of the United States on their Online Experience platform.

Hosted by storytellers from the United Stories campaign, the partnership showcase a range of experiences from culinary traditions of the South to the art of spoken word poetry.

http://airbnb.com/visittheusa
During the readiness phase of FY21, we’re focused on distribution of GoUSA TV and its content. Expanded availability includes

<table>
<thead>
<tr>
<th>Market: UK</th>
<th>Launch: August 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sessions</td>
<td>89,384</td>
</tr>
<tr>
<td>Average Session Duration</td>
<td>1 Hour 45 Minutes</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Market: Canada (Toronto)</th>
<th>Launch: November 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Ridership</td>
<td>72.4M</td>
</tr>
<tr>
<td>Average Weekday Riders</td>
<td>300,000</td>
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</table>
Curated by Sherry L. Rupert, CEO of the American Indian Alaska Native Tourism Association (AIANTA)—the only national association dedicated to indigenous tourism—the playlist elevates the voices of Native communities all across the U.S., while ensuring the stories are authentically presented.

Native Voices Playlist
- Spirit Song
- Trails + Trailblazers: Alaska
- Trails + Trailblazers: Arizona + Utah
- Trails + Trailblazers: Colorado
- New Mexico True Stories: The Silversmith
- New Mexico True Stories: The Guide
- Discover Montana: Racing with Tradition
- USA Through the Great Outdoors: Keanu Asing’s Hawaii
- America’s Treasures: National Parks: Devil’s Tower
- Ask a Local: Chickasaw Country
- United Stories: Surfing in Hilo, Hawaii
- United Stories: Kennedy Space Center
- United Stories: Native Voices
  - Museum of the American Indian – Washington D.C.
  - Acoma Pueblo – New Mexico
  - Crazy Horse Memorial – South Dakota
  - Hopi Artist – Arizona
Item 4

**Tom Garzilli**  
Chief Marketing Officer

**Aaron Wodin-Schwartz**  
SVP, Public Affairs

**Tracy Lanza**  
SVP, Integrated Marketing

**FY2021 Business Planning**

- Maintaining a State of Readiness
  - Brand USA Global Marketplace
  - Brand USA Travel Week Europe 2020
- Gating Events & Criteria
- Re-entry/Recovery Planning
BRAND USA TRAVEL WEEK EUROPE 2020

October 26-29, 2020
Exhibitor Recap

113 EXHIBITORS ACROSS THE U.S. AND THE GLOBE

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<thead>
<tr>
<th>U.S. EXHIBITOR</th>
<th>TOTAL #</th>
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<tbody>
<tr>
<td>Northeast</td>
<td>10</td>
</tr>
<tr>
<td>Southeast</td>
<td>35</td>
</tr>
<tr>
<td>Midwest</td>
<td>8</td>
</tr>
<tr>
<td>Southwest</td>
<td>14</td>
</tr>
<tr>
<td>West</td>
<td>11</td>
</tr>
<tr>
<td>Pacific</td>
<td>20</td>
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DESTINATION PARTNERS: 98

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<tr>
<td>RTOs</td>
<td>5</td>
</tr>
<tr>
<td>Attractions</td>
<td>6</td>
</tr>
<tr>
<td>Shopping</td>
<td>2</td>
</tr>
<tr>
<td>Federal &amp; Tourism Industry</td>
<td>2</td>
</tr>
<tr>
<td>OTHER PARTNERS</td>
<td>15</td>
</tr>
</tbody>
</table>
## Buyer Recap

155 buyers from 18 countries!

<table>
<thead>
<tr>
<th>MARKET</th>
<th># OF BUYERS</th>
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<tbody>
<tr>
<td>Austria</td>
<td>1</td>
</tr>
<tr>
<td>Belgium</td>
<td>4</td>
</tr>
<tr>
<td>Croatia</td>
<td>1</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>3</td>
</tr>
<tr>
<td>Denmark</td>
<td>3</td>
</tr>
<tr>
<td>France</td>
<td>15</td>
</tr>
<tr>
<td>Germany</td>
<td>16</td>
</tr>
<tr>
<td>Hungary</td>
<td>3</td>
</tr>
<tr>
<td>Ireland</td>
<td>5</td>
</tr>
<tr>
<td>Italy</td>
<td>30</td>
</tr>
<tr>
<td>Netherlands</td>
<td>16</td>
</tr>
<tr>
<td>Poland</td>
<td>1</td>
</tr>
<tr>
<td>Portugal</td>
<td>1</td>
</tr>
<tr>
<td>Romania</td>
<td>1</td>
</tr>
<tr>
<td>Spain</td>
<td>10</td>
</tr>
<tr>
<td>Sweden</td>
<td>1</td>
</tr>
<tr>
<td>Switzerland</td>
<td>2</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>42</td>
</tr>
</tbody>
</table>
750 attendees enjoyed

17 Keynotes, Enrichment Sessions and Market Updates

2600+ one-on-one, pre-scheduled appointments

24 Live Networking Sessions

Brand USA Travel Week Europe 2020
Enrichment Sessions

**KEYNOTE SESSION**

**CEO KEYNOTE CONVERSATION**

ARNE SORENSON  
PRESIDENT & CEO OF MARRIOTT INTERNATIONAL

**AVIATION: THE TRANSATLANTIC 'AIRSCAPE'**

JOSH EARNEST  
ADAM SACKS

**ENRICHMENT SESSION**

**EUROPEAN TRAVEL TRENDS**

DAMON EMBLING  
JENNY SOUTHAN  
DONALD LEADBETTER  
ANDREW GIBSON

**ENRICHMENT SESSION**

**SUPPORTING BLACK-OWNED TRAVEL BUSINESSES**

STEPHANIE JONES  
AL HUTCHINSON  
CHERAÉ ROBINSON
Market & Research Updates (Video On-Demand Room)

- Brand USA Market Updates
  - Emerging Markets
  - France
  - Germany & Austria
  - Ireland
  - Italy
  - The Netherlands
  - Spain
  - Switzerland
  - United Kingdom

- Brand USA Research Updates
  - Europe
  - France
  - Germany
  - United Kingdom
Exhibitor & Buyer Feedback

“Fantastic week, it was great to connect with our USA partners and get some positivity to build 2021 together!”
- Nora Gherras, Angela, France

“This year is super challenging and completely different to anything we have seen before. I’m looking forward to connecting with my industry friends to talk about the situation on both sides of the pond.”
- Fabio Negro, Group Head of North America, FTI Group

“The Global Marketplace is an amazing platform! User-friendly, virtual one-on-one meetings brilliant with timing prompts being spot on, Buyer Pavilion well organized, business card drop in our pod working well, Help Desk super responsive.”
- Marion Wolf, Visit St. Pete/Clearwater

“The Europe Travel Week is going well. Congrats on organizing such a successful virtual show.”
- Walt Wang, Visit California

#brandusaglobalmarketplace
Noteworthy Exhibitor Survey Results

- 99% of respondents said that they found Brand USA Global Marketplace helpful in achieving their goals for Brand USA Travel Week Europe 2020
- 91% of respondents said that they were satisfied with Brand USA Global Marketplace
- 90% of respondents said that they were satisfied with Brand USA Travel Week Europe 2020

On a scale 1-10, how likely are you to

- attend Travel Week Europe in the future? 8.7
- recommend Travel Week Europe to others? 8.5
- recommend building a pod on Brand USA Global Marketplace to others? 8
Noteworthy Buyer Survey Results

- 97% of respondents said that they found Brand USA Global Marketplace helpful in achieving their goals for Brand USA Travel Week Europe 2020
- 95% of respondents said that they were satisfied with Brand USA Global Marketplace
- 96% of respondents said that they were satisfied with Brand USA Travel Week Europe 2020
- On a scale 1-10, how likely are you to
  - attend Travel Week Europe in the future? 8.8
  - recommend Travel Week Europe to others? 8.6
Brand USA Global Marketplace: Upcoming Events*

Winter/Spring 2021

Focus on Canada

- The latest insights on the Canada travel landscape for U.S. partners, while providing the travel trade the latest products, protocols and ‘what’s new’ in the U.S. travel and hospitality industry.

Focus on Mexico

- The latest insights on the Mexican travel industry for our U.S. partners, while providing the travel trade the latest products, protocols and ‘what’s new’ in the U.S. travel and hospitality industry

Brand USA Receptive Operator Marketplace

- Connect U.S. partners with leading RTOs to ensure diversity and depth of U.S. product and programs in the pursuit of rebuilding international visitation to the United States

Brand USA European Media Forum & Trade Week

- Focusing on powerful destination storytelling, newsworthy panel discussions and targeted one-on-one meetings between influential European media and U.S. partners. This event will elevate the position of the U.S. in Europe.

Focus on Australia/New Zealand

- Provide key and relevant updates and insights on the travel landscape of Australia and New Zealand as we anticipate a return to summer and fall travel 2021

*Dates subject to change and events are tentative.
Future Travel Week Europe Dates

- 2021: County Hall London, October 25-29
- 2022: Frankfurt, October TBD
FOR MORE INFORMATION
WWW.BRANDUSAGLOBALMARKETPLACE.COM
Gating Events and Criteria & Re-entry/Recovery Planning

Aaron Wodin-Schwartz
SVP, Public Affairs
Brand USA

Tracy Lanza
SVP, Integrated Marketing
Brand USA
### Gating Criteria: Source Market Conditions

<table>
<thead>
<tr>
<th>Category</th>
<th>Criteria</th>
<th>Indicator</th>
<th>Target</th>
<th>Metric</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Source market conditions</strong></td>
<td>New daily COVID case growth</td>
<td>Month-over-month trends AVG cases per day</td>
<td>3 months of &quot;strong&quot; month over month trend OR less than 500 average cases per day</td>
<td>Weak &gt; +15%; Neutral &gt; -15%, &lt;-15%; Strong &lt; -15%</td>
</tr>
<tr>
<td></td>
<td>Air service</td>
<td>Planned increases in seat capacity from source market</td>
<td>3 months of &quot;strong&quot; month over month trend</td>
<td>Weak &lt;+0%; Neutral &gt;+0%, &lt;+15%; Strong &gt; +15%</td>
</tr>
<tr>
<td></td>
<td>Consumer sentiment</td>
<td>Increase in intent to visit the USA</td>
<td>3 months of &quot;strong&quot; month over month trend</td>
<td>Weak &lt;+0%; Neutral &gt;+0%, &lt; +10%; Strong &gt; +10%</td>
</tr>
<tr>
<td></td>
<td>U.S. and home country entry/ quarantine policies</td>
<td>Entry to the USA permitted No onerous requirements in USA or home country</td>
<td>Entry permitted from source market; Minimal quarantine requirement</td>
<td>Entry restrictions removed U.S. and home country quarantine requirements removed or minimized</td>
</tr>
<tr>
<td></td>
<td>Consumer behavioral indicators</td>
<td>Search and product queries for travel to the USA</td>
<td>3 months of &quot;strong&quot; month-over-month trend</td>
<td>Weak &lt;+0%; Neutral &gt;+0%, &lt;+15%; Strong &gt; +15%</td>
</tr>
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</table>
## Gating Criteria: Home Market Conditions

| Category                  | Criteria                                      | Indicator                                                      | Target                                                                 | Metric                      |
|---------------------------|-----------------------------------------------|                                                               |                                                                        |                            |
| **Home market conditions**| New daily COVID case growth                   | Sustained decline/maintained low volume of cases               | Under discussion (e.g., AVG case rate below x level + declines in new case rates) | Under discussion |
|                           | Destinations are open and eager to accept visitors | Gateway destinations allow recreational attractions, retail stores and restaurants to operate at sufficient capacity | Under discussion (e.g., x number of partners say they are ready to receive int’l visitors. Removal of state-to-state quarantine requirements.) | Under discussion |
Measuring Progress Toward Recovery

- Using the gating criteria included in our FY21 objectives, create an analytics dashboard that regularly tracks measurement on a market by market basis.
- The dashboard will be embedded into our corporate website for easy share-ability with partners and the industry.

- Target date for launch is mid-December 2020.

Charts are directional only.
Create an integrated campaign that drives consumer inspiration and partner value

Considerations

1. Integrated Platform approach must inspire, build confidence and drive partner bookings
2. Campaign elements must deliver big messaging and destination awareness
3. Airline, OTA and Tour Operator partners provide transactional opportunities
4. Timing will vary based on market conditions (which will be informed by gating measurement)
Drive Intent and Bookings to the USA

Creative Platform In Development

Prove We’re Ready
- Influencers,
- Owned Social
- Branded Content

Welcome the World Back
- TV
- OLV
- PR

Entice and Convert
- Social
- Digital
- Airlines
- OTAs
- Tour Operators

Bring to Life Possibilities
- Social
- Digital
- Influencers
- Partner Programs
- Itineraries

Business Goal

Strategy

Communication Tasks

Potential Channels/Tactics
## Marketing Calendar

<table>
<thead>
<tr>
<th>Executional Elements &amp; Estimated Timing</th>
<th>Production</th>
<th>Inspiration</th>
<th>Recovery</th>
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<tbody>
<tr>
<td>8-12 Weeks</td>
<td>8-12 Weeks</td>
<td>16+ Weeks</td>
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<th>Brand USA Originals: Affinity &amp; Activity Programming</th>
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<th>Integrated Recovery Campaign</th>
<th>Creative Development</th>
<th>Creative Testing</th>
<th>Creative Production</th>
<th>Paid Media: Native, OLV, Social, Display, SEM</th>
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<tr>
<th>Always-on Inspirational Content (Recovery Audience Prospecting)</th>
<th>Organic Social, OLV</th>
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| Multi-Channel & Social Pre-Pro | Multi-Channel (Broadcast, Traffic Generation, Social, Native, Display) | Multi-Channel (Broadcast, Traffic Generation, Social, Native, Display) |

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Item 5

Kyle Edmiston
Chair
Brand USA Finance Committee

Donald Richardson
Chief Financial Officer

Finance Committee Report

- FY2020 Q4 & Year-end financials
- FY2020 Audit status
FY2020 Preliminary Financial Statement Results

- Travel Promotion Fund
  - We met our FY 2020 match goal of $100M in March 2020, which is earlier than ever before.

- Partner Revenue
  Total partner cash contributions and in-kind contributions were $32.1M for FY 2020, which is $7.4M less than revised budget and $69.5M less than FY 2019.
  - Partner Cash Contributions – we received $20.2M in partner contributions ($3.1M above FY 2020 Revised Budget and $24.9M below original budget).
  - In-Kind Contributions – we received $11.9M in in-kind contributions ($10.5M less than FY 2020 Revised Budget and $18.9M below original budget).
  - Partner Programs – we received $0.7M of Sponsorship revenue and Partner Programs ($0.1M less than FY 2020 Revised Budget and $5.3M below original budget).

- Expenses
  - Expenses are currently $21.8M below revised budget for FY 2020, primarily due to reduced spending as a result of COVID-19.
  - Significant reduction of $61.8M from original budget of $149M.
FY2020 Financial Statements Audit Status

- Interim fieldwork has been completed
- Final fieldwork will be conducted in December 2020
- Audit Report will be issued no later than January 31, 2021
Governance & Nominating Committee Report

- Board of Directors Appointments
  - Official of State Tourism Office
    - John Edman not eligible for reappointment
  - Small Business or Retail Sectors
    - Mike Gallagher eligible for reappointment
  - Travel Distribution Services Sector
    - Noel Irwin Hentschel eligible for reappointment

- FY2021 Board of Directors leadership*

*Vote Required
Future Meetings Schedule

- **Q2 FY2021** – Washington, DC
  - March 1-2, 2020
- **Q3 FY2021** – Washington, DC
  - May 19-20, 2021
- **Q4 FY2021** – Colorado Springs, CO
  - July 20-21, 2021
Questions & Answers
Closing Remarks
Thank you!