Board Meeting Agenda
1:00 - 2:00pm

Opening remarks
- Item 1: Approval of minutes from the May 20, 2020 Board Meeting*
- Item 2: CEO report
  - Navigating the COVID-19 Pandemic
  - FY2020 Close & FY2021 Business Planning
  - Travel Week’s Europe & India Previews
  - 2020 U.S.-China Tourism Leadership Summit
  - Diversity & Inclusion Initiatives

Marketing Strategies/Accomplishments
- Item 3: COVID-19 response
- Item 4: FY2021 Business planning
  - State of readiness
  - Gating events w/conditions & criteria
  - Re-entry/recovery planning
    - Brand USA (Digital) Global Marketplace
- Item 5: FY2021 Objectives, summary marketing plan & budget*
  (pre-read, requires Board approval)

Finance Committee
- Item 6: FY2020 Q3 financials

Governance and Nominating Committee
- Item 7: FY2021 Board of Directors appointments & Federal Register Notice
  - 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 8: FY2021 Board of Directors leadership
- Item 9: Future meetings schedule
  - Q1 FY2021 – November 16-17, 2020, Washington, DC
  - 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
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 Gruenberg  
Senior Vice President, Partner Marketing & Strategic Alliances

Tracy Lanza  
Senior Vice President, Integrated Marketing

Jackie Ennis  
Vice President, Global Trade Development

Joann Pelipesky  
Vice President, Human Resources & Administration

Carroll Rheem  
Vice President, Research & Analytics

Aaron Wodin-Schwartz  
Senior Vice President, Communications, Public Policy & Public Affairs

Jake Conte  
Vice President, General Counsel

Brian Watkins  
Director, Information Technology
Approval of the Minutes

- May 20, 2020 Board Meeting*

John Edman
Chair
Brand USA Board of Directors
Item 2

CEO Report

- Navigating the COVID-19 Pandemic
- FY 2020 Close & FY2021 Business Planning
- Travel Week’s Europe & India Previews
- 2020 U.S. - China Tourism Leadership Summit
- Diversity & Inclusion Initiatives

Chris Thompson
President & CEO
Items 3-5
Marketing Strategies/Accomplishments

Tom Garzilli
Chief Marketing Officer

Karyn Gruenberg
SVP, Partner Marketing & Strategic Alliances

Tracy Lanza
SVP, Integrated Marketing

Aaron Wodin-Schwartz
SVP, Communications & Public Policy

Carroll Rheem
VP, Research & Analytics

Jackie Ennis
VP, Global Trade Development

Marketing Strategies/Accomplishments

- COVID-19 Response
- Business Planning
  - State of readiness
  - Gating events w/conditions & criteria
  - Re-entry/recovery planning
    - Brand USA (Digital) Global Marketplace
- FY21 Objectives & budget (pre-read requiring Board approval)
Item 3

Tom Garzilli
Chief Marketing Officer

Aaron Wodin-Schwartz
SVP, Communications & Public Policy

Tracy Lanza
SVP, Integrated Marketing

COVID-19 Response
Now and Next

Brand USA’s Ongoing Efforts - *Keeping the Lights On*

Recovery and Market Re-entry Plan Moving Forward - *We know the What, Not the When*

Brand USA Global Marketplace/Travel Week Europe - *Creating the Re-entry Vehicle for Stakeholders*
Our Commitment

COVID-19 WEBINARS

- 2,489 participants
- 1,119 recorded presentation views
- 1,803 presentation downloads

COVID-19 WEBSITE

- 7,237 page views
- 6,196 unique page views
- 2:00 min avg. time on page
- 40% increase over next most visited page

1. PROVIDE GUIDANCE, INFORMATION & INSIGHT

The Coronavirus resource page leads Brand USA website engagement:

- 7,237 page views
- 6,196 unique page views
- 2:00 min avg. time on page
- 40% increase over next most visited page
2. DELIVER HOPE & OPTIMISM

NEW LAUNCHES

‘Stay Home. Stay Inspired’

Episodic and engaged video content for our 7 million hand-raisers to view via our Visit The USA social media channels and GoUSA TV online streaming channel

Traveling Minds on Instagram Stories

Taking our audience on an exploration of the USA from their own homes

- 43 cities
- 160 attractions
- 46 states
- 155K engagements
- 9.6M views
- 5.9K posts

NEW LAUNCHES

SUPPORTING OUR GLOBAL NETWORK

Since March 2020 we have hosted:

- 200+ training seminars
- 15 markets
- 45,000+ travel agents / tour operators

We are actively promoting our USA Discovery Program which educates and tests agents’ knowledge of U.S. states and destinations.

During the first 4 months of 2020, travel agents have completed 58,007 certification badges vs. 19,000 in all of 2019

We have featured 176 partner destinations in the Global Inspiration Guide and made important adjustments to the Inspiration Guide to protect our cooperative marketing plans.
Brand USA is using this pause in travel activity to build marketing tools to stimulate active consideration and travel bookings at the first indication conditions are appropriate.
FY2021 Business Planning

- State of readiness
- Gating events w/conditions & criteria
- Re-entry/recovery planning
  - Brand USA (Digital) Global Marketplace
FY2021 Objectives, Summary Marketing Plan & Budget
Framework

- State of readiness
- Gating criteria
- Recovery
Maintaining a State of Readiness

1. **Priority:** Spend efficiently to affect relevant factors to travel during state of readiness and prepare for a robust recovery effort.  
   **Objective:** Prepare for a robust recovery with as many resources as possible.  
   **Measure:** Resources allocated to recovery campaign.

2. **Priority:** Maintain a state of readiness.  
   **Objective:** Recovery campaign ready to go, including partner opportunities.  
   **Measures:** Ready launch plan and assets by beginning of FY2021.

3. **Priority:** Maintain engagement with travel distribution networks.  
   **Objective:** Maintain travel trade presence in key source markets to keep the USA top of mind via training, webinars, and B2B engagements (e.g. new virtual global marketplace).  
   **Measures:** Number of travel trade engagements and number of partners engaged.

4. **Priority:** Keep the drumbeat of inspiration alive.  
   **Objective:** Deploy inspirational consumer messaging through organic digital and social channels, GoUSA TV, and earned media.  
   **Measures:** Engagement (comments, likes, share), video views, and impressions.
Priority: Help the industry maintain a state of readiness.  
Objective: Provide Brand USA partners and the U.S. travel and tourism industry with market intelligence and a global infrastructure to maintain a presence in the international marketplace.  
Measures: Participation in research webinars and small roundtable groups; participation in Brand USA travel trade programs; partners returning to market when conditions are right.

Priority: Maintain a pulse on market and industry conditions.  
Objective: Track market and industry conditions to monitor gating criteria, provide value to the industry, and inform marketing messaging.  
Measures: Consumer sentiment; consumer behavioral indicators; market, travel trade, and media reports from international offices.

Priority: Communicate entry policy and opening status.  
Objective: Maintain and disseminate a central repository of up-to-date entry policy and procedure information as well as critical state-, city-, and company-level opening information and health protocols.  
Measures: Information is regularly maintained and included in proactive trade engagement and external communication to stakeholders.
## Gating Criteria

<table>
<thead>
<tr>
<th>Category</th>
<th>Criteria</th>
<th>Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source market conditions</td>
<td>Air service</td>
<td>Planned increases in seat capacity from source market</td>
</tr>
<tr>
<td></td>
<td>Consumer sentiment</td>
<td>Increase in intent to visit the USA</td>
</tr>
<tr>
<td></td>
<td>U.S. entry policy toward market and source-</td>
<td>Entry to the USA is allowed</td>
</tr>
<tr>
<td></td>
<td>market policy toward travel to the USA</td>
<td>No onerous requirements in home country (such as 14-day quarantine)</td>
</tr>
<tr>
<td></td>
<td>Consumer behavioral indicators</td>
<td>Substantive increases in search and product queries for travel to the USA</td>
</tr>
<tr>
<td>Home market conditions</td>
<td>COVID-19 levels</td>
<td>Sustained decline/maintained low volume of cases</td>
</tr>
<tr>
<td></td>
<td>Destinations are open and eager to accept</td>
<td>A majority (~80%) of gateway destinations allow recreational attractions,</td>
</tr>
<tr>
<td></td>
<td>visitors</td>
<td>retail stores and restaurants to operate at full capacity</td>
</tr>
<tr>
<td>Partner/fiscal conditions</td>
<td>Partner demand for international marketing</td>
<td>Partner surveys and roundtable group feedback</td>
</tr>
<tr>
<td></td>
<td>Partner contributions</td>
<td>Partner dollars allocated for international and LOAs to Brand USA</td>
</tr>
</tbody>
</table>
Recovery

1. **Priority:** Drive international arrivals, spending, and revenue for travel suppliers, as well as state and local DMOs in the United States.  
   **Objective:** Generate measurable bookings through an inspirational campaign that integrates selected tour operators, airlines, and OTAs through calls-to-action and use of Brand USA itinerary programs and other tools.  
   **Measures:** Attributable bookings; participation and engagement by tour operators, OTAs, airlines.

2. **Priority:** Deploy an effective and efficient campaign.  
   **Objective:** Make the USA the easy and obvious choice as a travel destination.  
   **Measures:** Engagements, video views, CPM; campaign-led bookings.

3. **Priority:** Represent the entirety of the United States, including rural and urban areas.  
   **Objective:** Include as many states, cities, regions, and territories as possible in the creative for the recovery campaign, ensuring a balance of rural and urban destinations.  
   **Measures:** Number of city and states included, and rural/urban ratio of included destinations.

4. **Priority:** Use recovery platform for cooperative marketing.  
   **Objective:** Implement cooperative marketing opportunities in conjunction with the campaign with focus on activation.  
   **Measures:** Number of partners participating; percentage of returning partners YOY; attributable bookings.
Moving Forward
Recovery & Market Re-entry
Over the past few weeks, we’ve been immersing ourselves in the plethora of secondary research available to the industry in the form of reports, data, webinars, seminars, predictions, and forecasts.

The learnings and insights we’ve gathered served as key inputs to our brand and communications strategy in the following sections.

Here’s what we’ve found so far.
<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Re-evaluating “Normal”</strong></td>
<td><strong>3. Safety Will Be Non-Negotiable</strong></td>
<td><strong>5. The Great Outdoors</strong></td>
</tr>
<tr>
<td>Implication: It’s important that we are optimistic in tone and play into our aspirational DNA that the U.S. is more than just a destination, it’s an idea that we can tap into to emotionally connect with consumers.</td>
<td>Implication: Clearly communicate the U.S. is safe for international travelers and we are ready to welcome them with the appropriate protocols and procedures.</td>
<td>Implication: Lean into the abundance of open roads, vast lands, sprawling national parks, and off-the-beaten path destinations that are uniquely ownable to the U.S.</td>
</tr>
<tr>
<td><strong>2. Optimism for Future Travel</strong></td>
<td><strong>4. Freedom to Fully Experience</strong></td>
<td><strong>6. The Road Trip</strong></td>
</tr>
<tr>
<td>Implication: Travel willingness will recover, and when it does, it’s crucial that we’re in market with an ownable rallying cry that resonates just as well with partners as consumers.</td>
<td>Implication: Make sure that information about our destinations and the many experiences available to tourists comes through in our messaging.</td>
<td>Implication: The U.S. is home to the road trip, a uniquely American strength that we should prioritize via our recovery campaign.</td>
</tr>
</tbody>
</table>
Driving intent to Visit the USA and increasing engagement with United States content within Brand USA all work toward a single goal:

Leading the recovery of the United States Travel and Tourism Industry.

The strategy you’ll see today will show how we’ll accomplish this goal.
Brand Strategy
HUMAN INSIGHT

Our lives have been interrupted and put on hold, giving us unprecedented time to reflect and re-prioritize our values.
BRAND TRUTH

The U.S. is an aspirational destination that truly reflects the spirit of reinvention.
Reset & Go
Comms Tasks
<table>
<thead>
<tr>
<th>Comms Tasks</th>
<th>Comms Tactic</th>
<th>Potential Channels Tactics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Welcome the World Back</td>
<td>High impact creative execution that provides a clear sign that the USA is once again welcoming tourists to visit.</td>
<td>TV OLV PR</td>
</tr>
<tr>
<td>2. Bring to Life Post-COVID Possibilities</td>
<td>Communications tactics which bring to life the incredible possibilities of a U.S. trip even in a post-COVID reality. There are countless socially-distant experiences that our audience may not consider on their own.</td>
<td>Social &amp; Digital Influencer Program Articles/Itineraries</td>
</tr>
<tr>
<td>3. Prove We’re Ready</td>
<td>Strategies which highlight the efforts being taken by our airports, DMOs, tourism operators, etc. to ensure safety for travelers who come back to visit us as this will be non-negotiable.</td>
<td>Influencer Program Website (Owned) Social Search</td>
</tr>
<tr>
<td>4. Entice and Convert</td>
<td>Deploy marketing strategies which ensure that the USA maintains its fair share of International travellers through lower-funnel tactics aimed at driving bookings.</td>
<td>Social Digital Tour Operator/Airline/OTA Partnerships</td>
</tr>
<tr>
<td>5. Open our Toolbox</td>
<td>Ensure the Reset and Go Platform provides our partners new tools that they can use to be a part of the comeback effort and drive bottom line results.</td>
<td>Toolkits Influencers UGC</td>
</tr>
</tbody>
</table>
Our Engagement Framework

**Business Goal**

Lead the International Recovery of the U.S. Travel and Tourism Industry

**Marketing Objectives**

Drive Intent to Visit the USA
Drive Bookings
Increase Engagement with Brand USA

**Strategy**

Reset and Go

**Comms Tasks**

- Welcome the World Back
- Bring to Life Post-COVID Possibilities
- Prove We’re Ready
- Entice and Convert
- Open our Toolbox

**Potential Channels / Tactics**

- TV
- OLV
- PR
- Targeted Social & Digital Influencers Articles Itineraries
- Website (Owned) Social Search
- Social Digital
- Toolkits Influencers UGC

Welcome the World Back

Bring to Life Post-COVID Possibilities

Prove We’re Ready

Entice and Convert

Open our Toolbox

Increase Engagement with Brand USA
Working Two Challenges

• Our partners have left the international marketing space to focus on local recovery. We will develop a re-entry vehicle for our return which is:
  • Dynamic - scalable and global
  • Disruptive - an innovative solution which will replace inefficient, inertia-driven methods
  • Efficient – lowering barriers to participate and requiring minimal resources

• Create a virtual version of Travel Week for 2020 and beyond
  • Even when we return to Face to Face meetings, Virtual will remain a part of that experience
Brand USA Global Marketplace: Overview

- Platform available 24/7
- Content both evergreen and refreshed
- Virtual rooms accessed from Lobby
  - Partner Pavilions for Exhibitors & Buyers
  - Main Stage for Programming/Enrichment
  - GoUSA TV Room for Film, TV, Entertainment and On-demand Enrichment
- Launching late September
Brand USA Global Marketplace: Virtual Partner Pavilion

- Accessible 24/7 for one year
- Partners may include: destinations, attractions, hotels, airlines, tour operators, etc.
- Ability to organize by region or theme
- Partners can use to host events and meetings
Global Marketplace Partner Pavilion: Virtual Partner Pod

- Pods can be used individually and can be repurposed for other events
- Features for a U.S. Destination or Attraction Pod include:
  - Logo Branding
  - Clickable links
  - “Virtual Briefcase” to collect content and collateral
  - Video Welcome Message & Destination Overview
  - COVID-19 Updates
  - Virtual Business Card drop off and pick up
  - Schedule/Request an Appointment
Brand USA Global Marketplace

International and Domestic Application
Partner Events
Consumer Shows
Brand USA Global Marketplace Hosts Virtual Travel Week Europe 2020
October 26-30
Future of Brand USA Travel Week Europe

• 2020: Brand USA Global Marketplace, October 26-30

• 2021: County Hall London, October 25-29

• 2022: Frankfurt, October TBD
Item 5

John Edman
Chair
Brand USA Board of Directors

Kyle Edmiston
Chair
Finance Committee

FY2021 Objectives, Summary Marketing Plan & Budget
(pre-read requiring Board approval)
Item 6

Kyle Edmiston
Chair
Finance Committee

Donald Richardson
Chief Financial Officer

Finance Committee Report

- FY2020 Q3 Financials
Financial Update

• Expenses
  - We presented a reduced COVID budget of $109.1M. We are now anticipating to come in $15M below our reduced budget.

• Revenue
  - We anticipate 60% less than our original budget for FY 2020.
    - Cash Contributions will be down 60% from original budget in FY 2020.
    - In-Kind Contributions will be down 60% from original budget in FY 2020.

• FY 2021 Headwinds
  - Recovery date of international travel is unknown, we are currently anticipating recovery to begin April 1, 2021.
  - Budget that was approved is based on conservative projections on recovery and revenue.
    - Contributions time table will be delayed mostly until after recovery begins in 2\textsuperscript{nd} half of FY 2021.
    - FY 2021 ESTA match funds will be received mainly in Q4 2021 onwards into FY 2022.
Governance & Nominating Committee Report

- Board of Directors Appointments & Federal Register Notice
  - Official of State Tourism Office
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  - Travel Distribution Services Sector
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- FY2021 Board of Directors Leadership
Future Meetings Schedule

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  - November 16-17, 2020
- Q2 FY2021 – Washington, DC
  - March 1-2, 2021
- Q3 FY2021 – Washington, DC
  - May 19-20, 2021
- Q4 FY2021 – Colorado Springs, CO
  - July 20-21, 2021
Thank you!