Board Meeting Agenda
1:00 - 2:00pm

Opening Remarks
- Item 1: Approval of Minutes from the February 13, 2020 Board Meeting*
- Item 2: CEO Report
  - Navigating the COVID-19 Pandemic
  - USG Deliverables
    - ROI Study
    - FY2019 Annual Report
  - 2020 U.S.-China Tourism Leadership Summit

Marketing Strategies/Accomplishments - Items 3-5
- Item 3: Pre-COVID-19 Q2 Accomplishments/Report Outs
- Item 4: Within COVID-19 Response
- Item 5: Post-COVID-19 Recovery/Re-entry

Finance Committee
- Item 6: FY2020 Q2 Financials

Governance and Nominating Committee
- Item 7: 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

Future Meetings Schedule
- Item 8: Long-term Strategic Planning Postponed
  - Q4 FY2020 – July 28-29, 2020, Portland, OR
  - Q1 FY2021 – November 16-17, 2020, Washington, DC

Open Meeting for Discussion & Questions/Comments
Closing Remarks and Adjourn Meeting

*Vote Required
Opening Remarks

John Edman
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

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

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

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

Jake Conte  
Vice President  
General Counsel
Item 1

Approval of the Minutes

- February 13, 2020 Board Meeting*

John Edman
Chair
Brand USA Board of Directors
Item 2

CEO Report

- Navigating the COVID-19 Pandemic
- USG Deliverables
  - FY2019 ROI Study
  - FY2019 Annual Report
- 2020 U.S.-China Tourism Leadership Summit

Chris Thompson
President & CEO
In FY2019, Brand USA marketing activities generated:

- 901K incremental visitors
- $3.2 billion dollars in direct spending
- $6.8 billion in total (direct, indirect and induced) sales
- $913 million in federal, state and local taxes
- 42,524 incremental jobs
- 24:1 Marketing ROI
- 21:1 Organizational ROI
Over 7 years, Brand USA marketing activities generated:

- 7,453,707 incremental visitors
- $24.9 billion dollars in direct spending
- $54.5 billion in total (direct, indirect and induced) sales
- $7.1 billion in federal, state and local taxes
- 50,390 incremental jobs
- 27:1 Marketing ROI
- 24:1 Organizational ROI
• Transmitted each year to House and Senate committees of jurisdiction

• Captures the highlights, spirit, and results of Brand USA’s activities from October 1, 2018 – September 30, 2019

• Single best encapsulation of how Brand USA inspires travel to the USA, creates value for partners, drives the economy, and lives up to the mandate of a public-private partnership

(3) Annual report to Congress

The Corporation shall submit an annual report for the preceding fiscal year to the Secretary of Commerce for transmittal to the Congress on or before the 15th day of May of each year. The report shall include—
FY2019 Annual Report

- Inviting to broad audience
- FY2019 highlights
- Industry testimonials
- Target market and demographic models
- Objectives review
- Rural/urban marketing breakdown
- Financials and in-kind contributions
- Contributing partners
- And more

HEAR THE MUSIC

"Hear The Music" is a包含 the universal appeal of American music by harnessing authentic and compelling connections, which transcends boundaries, borders, and cultures. The campaign uses one of America's most important assets, music, to inspire the world to discover the people and places behind the USA's rich and diverse culture.

New Features

- "What I Like About You" by the Barenaked Ladies
- "Fly Me to the Moon" by Frank Sinatra
- "What a Wonderful World" by Louis Armstrong
- "Disco" by the Commodores

Activities to Promote Tourism in Rural and Urban Areas

The great thing about Brand USA, especially for states like Oklahoma and small communities like mine, is that we were able to amplify the amazing story we have to tell about Native Americans, our culture, the history of oil and cowboys...all of those things that I couldn't, as a smaller destination organization, reach on my own.

Macy Swindell Guy
Executive Director
Visit Bartlesville
Marquee event to build and strengthen relationships between U.S. and Chinese travel industry and government leadership

Reaffirm the importance of travel and tourism to the world’s two largest economies

Engage partners with the latest trends, insights, and opportunities

2020 scheduled to be 14th annual summit

Developing contingency plans and continuing summit planning
Items 3-5
Marketing Strategies/Accomplishments

Tom Garzilli
Chief Marketing Officer

Karyn Gruenberg
SVP, Partner Marketing & Strategic Alliances

Tracy Lanza
SVP, Integrated Marketing

Carroll Rheem
VP, Research & Analytics

Jackie Ennis
VP, Global Trade Development

Marketing Strategies/Accomplishments

- Pre-COVID-19 Q2 Accomplishments/Report Outs
- Within COVID-19 Response
- Post-COVID-19 Recovery/Re-entry
Item 3

Pre-COVID-19 Q2 Accomplishments/Report Outs

Tom Garzilli
Chief Marketing Officer
H1 Campaign Highlights

3.4B Impressions  23M Engagements  701M Video Views

In FY20, we implemented the following optimizations to the United Stories campaign:

- YouTube became the center of gravity
- Aligned creative with market insights
- Focused on shorter-formats with key messaging in first 15 seconds for social

Due to these improvements, H1 of FY20 saw significant increases across our key metrics, despite a decrease in spend YoY:

30% Increase in Impressions  19.5% Increase in Engagements  50.3% Increase in Video Views
Streaming Video Update

GoUSA
Because every place has a story.
GoUSA TV Is A Multi-Purpose Platform

• Original Shows + Partner Storytelling + Licensing = The Next Gen of Travel Entertainment
• Non-paid views (+65%) and average session duration (+9.5%) are up in H1
• The new dashboard will provide rich insight into market-level viewing behavior & preferences
• In-kind contribution continues to grow with FY21 projected at $10M+
America’s Musical Journey Streaming Launch

In Q1 FY20, we launched America’s Musical Journey on GoUSA TV platforms (OTT, Android, iOS and YouTube) to make it available to a wider global audience.

• To date, worldwide streaming has generated over 2.41M views of the film and 42M views of the trailer.

• We are exploring distribution on other major streaming platforms and global networks to further expand audience reach.

GoUSA
Airline/Inflight Agreements

Inclusion of GoUSA content into their inflight experience:
- National Parks Adventure
- America’s Musical Journey
- Spirit Song
- Trails & Trailblazers

Inflight:
- National Parks Adventure
- America’s Musical Journey
- Spirit Song
- Trails & Trailblazers
- For The Love of Music
- USA Through Film
- USA Through Outdoors
- Inflight Entertainment
- Print
- In-Store (Virgin Holiday)
- On-Line
- Social Media
- Clubhouse

Co-branded content partnership between delivered across the Virgin network of channels, including:
- National Parks Adventure
- America’s Musical Journey
- Something in the Water
- USA Through Film
- USA Through Outdoors
- Inflight Entertainment
- Print
- In-Store (Virgin Holiday)
- On-Line
- Social Media
- Clubhouse
## Quarterly KPI Summary

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Metric</th>
<th>Q1</th>
<th>YOY</th>
<th>Q2</th>
<th>YOY</th>
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</thead>
<tbody>
<tr>
<td><strong>Brand USA-led Campaign Media</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase media efficiently and optimize channels</td>
<td>Paid Impressions</td>
<td>1,276,111,405</td>
<td></td>
<td>886,243,604</td>
<td></td>
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<tr>
<td></td>
<td>CPM</td>
<td>$1.66</td>
<td>-66%</td>
<td>$1.95</td>
<td>-50%</td>
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<tr>
<td>Increase viewership of video ads</td>
<td>Video Views (15 sec)</td>
<td>85,500,882</td>
<td></td>
<td>73,838,104</td>
<td></td>
</tr>
<tr>
<td>Increase video ad viewer retention</td>
<td>15 second view rate</td>
<td>21%</td>
<td>557%</td>
<td>13%</td>
<td>4%</td>
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<tr>
<td>Increase owned channel engagement (websites, social,</td>
<td>Organic Views</td>
<td>2,024,179</td>
<td>50%</td>
<td>1,920,005</td>
<td>9%</td>
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<tr>
<td>YouTube and GoUSA TV)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase GoUSA TV Viewership</td>
<td>Number of Viewers</td>
<td>26,472</td>
<td>218%</td>
<td>37,649</td>
<td>368%</td>
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<tr>
<td></td>
<td>Average Minutes per Viewer</td>
<td>57</td>
<td>-15%</td>
<td>47</td>
<td>-34%</td>
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<tr>
<td><strong>Public Relations</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Attract international consumer media coverage</td>
<td># of Impressions</td>
<td>1,691,984,633</td>
<td></td>
<td>7,804,594,046</td>
<td></td>
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<tr>
<td><strong>Global Trade</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engage in-market travel trade</td>
<td>Number of agents trained</td>
<td>19,328</td>
<td></td>
<td>23,505</td>
<td></td>
</tr>
</tbody>
</table>
Item 4

**Within COVID-19 Response**

- Providing Guidance, Information & Insight
- Keeping the Lights on: Educate, Entertain & Inspire
- Building SMART Marketing Tools for Re-entry & Recovery
Providing Guidance, Information & Insight
Research Webinars: March, April & May

Adjusted Quarterly Research Webinar format for partners to a monthly frequency

- **March 19, 2020 (Limited to partners)**
  301 Live participants / 394 Views of recorded webinar

- **April 16, 2020 (Limited to partners)**
  328 Live participants / 242 Views of recorded webinar

- **May 15, 2020 (Open to public)**
  721 Live participants
Focus: Key indicators and aspects of recovery

COVID-19 Cases

- Market status (decelerating, flat, accelerating)

Projections of Economic Impact (Oxford Economics)

- GDP, Tourism Receipts, Employment

Consumer Insights

- Longitudinal analysis of intent to travel, changes in priorities and motivations

Download the last webinar at: https://www.thebrandusa.com/events/webinars
Educate, Entertain & Inspire: Travel Trade

Educate and engage the global travel trade industry to keep them inspired and knowledgeable about the USA during this time

- USA Discovery Program ✓
  - Encourage & incentivize the retail agent community to learn more about the diverse aspects of the USA from their home bases
- Webinars ✓
  - Provide informative and inspiring webinars to the trade to encourage deeper knowledge of the USA
- Toolkit ✓
  - Develop of a comprehensive asset toolkit to create brand and visual consistency
International Representation: 16 offices, reaching over 20 markets

While we are optimizing on a market by market basis, we remain in every country as before, and continue our efforts.

- Canada
- Mexico
- Europe
  - UK & Ireland
  - Germany, Austria, Switzerland & the Netherlands
  - France, Luxembourg & Belgium
  - Spain
  - Italy
- Brazil
- China (2 offices)
- India
- Japan
- South Korea
- Hong Kong
- Singapore
- Taiwan
- Australia & New Zealand
Global Trade Education

Inspiring the travel trade in the same way we inspire the consumer

• Feb 17-May 15, 2020: **21,500** agents trained (typically train 3,600 agents per quarter)
• USA Discovery Program: 8 languages, localized in 11 markets
• Offering incentive programs
• Newsletters delivered to trade partners
• GoUSA TV and Giant Screen Films
• Competitions and trivia quizzes
Travel Trade Tool Kits: Launched May 6th

The United Stories toolkit will help tour operators promote their offerings and create consistency for campaign assets.

The toolkit includes:

- Suite of image assets
- Print ads
- Banner ads
- Regional articles
- Sizzle reels
- Social videos
- YouTube embed links
- Usage guidelines

Access it here: https://traveltrade.visittheusa.com/toolkit/introduction
Educate, Entertain & Inspire: Consumer

Curate an entertainment-driven approach to messaging centered on social & streaming video while people are home travel dreaming

- United Stories ✓
  - “Always on” organic distribution to our followers on social media platforms in 8 languages
- Virtual Road Trip ✓
  - Visit the entirety of the USA with influencers, “special guests” and opportunities to explore more with a variety of interactive and immersive features and links
- GoUSA TV Roadblock ✓
  - Drive installations and interactions with a rally cry to encourage the industry to immerse themselves in USA travel storytelling
- GoUSA TV Spring Season Launch ✓
  - Focus on GoUSA Originals, Partner Programs and Licensed Series
Brand USA Partner Programs Update

We have paused partner co-op marketing campaigns, scheduled to run for summer travel. This includes Affinity Programs, Media Planning and Brand USA Originals.

All Spring Multi-Channel (MC) Programs Paused
- Markets: Australia, Brazil, Canada, China, Germany, Japan, Mexico

Global Inspiration Program Paused
United Stories: Production Status

Impact of COVID-19

• Production is on pause
• Remaining trips will be scheduled as possible
• Launch of airstream has been postponed but we are ready to resume when signs are positive
• But we still completed 4 productions in FY20!
In February, we invited @ProfessionalTraveler, a sun-loving Brazilian travel influencer, to experience the wonders of Wyoming in the winter.
United Stories: Always-On Content

Though we paused on the ground production, we quickly shifted the campaign to use our portfolio of existing assets to maintain a steady drumbeat of travel inspiration, featuring…

• Immersive and interactive social media content
• Favorite influencers
• Prioritized Great Outdoors content
• Scaled back Celebrations and Nightlife content

Mika Mey (1st person to see all 419 U.S. National Parks) from Duluth, MN shared his favorites
United Stories: Virtual Roadtrip

- March 25th-May 13th immersive and interactive posts directed at our 7M+ followers on social media
- Visited all of our states, territories and the nation’s capital
- Amplification by partners was a key component of organic distribution
- Results (as of April 30th)
  - Total Posts: 4.7k (including all translations)
  - Total Views: 7.9M
  - Total Engagements: 114.5K
The GoUSA TV is a multi-purpose platform, and is an even more important tool in this crisis

• Streaming and digital viewership is growing dramatically

• Drives inspiration and dreaming at a time when consumers are most interested

• Platform is valuable for international and domestic consumption

• Organic views in the USA = 31,000+ hours of viewing time and ~300,000 views since May 2019
GoUSA TV Roadblock: April 23, 2020

Objective: Launched on Thursday, April 23rd, the goal of the social media roadblock was to drive partner engagement and familiarity with the channel.

Immediate results included:

● Engaged directly with and received positive response from almost 400 partners
● 424% increase in mobile installs of the GoUSA app on the day of the Roadblock versus day prior
● Created an entirely new social eco-system for GoUSA TV on FB, IG, Twitter and Linked-In
Current & Upcoming Shows:
Featuring more than 40 destinations

MacGillivray Freeman Films
USA Through FOOD
Saville Productions
AMERICANOS
Chief
ESPN

MacGillivray Freeman Films
BBC
El Rey
ESPN

TRAILS & TRAILBLAZERS
California Pop
ESPN
La Última EXPERIENCIA
Lucky In Love Trailer
Developing an 18-month recovery plan focusing on markets on a priority basis to:

- Build engagement
- Support destinations’ and stakeholders’ return to the marketplace
- Drive bookings
FY20/FY21 Recovery Plan: Market Entry Prioritization

Canada
Mexico
UK/Europe

Australia/
New Zealand
South Korea
Japan

China
India
Brazil

Priority 1
Priority 2
Priority 3
FY20/FY21 Recovery Plan: Now and continuously: Entertain & Inspire

- Keep a steady drumbeat of inspiring travel content to engage followers and encourage them to dream about and share their own travel stories while staying home
- Provide business development opportunities for destination partners and tour operators
FY20/FY21 Recovery Plan:
Next: Drive Intent & Bookings

● **All Markets:**
  - Continue trade training and outreach
  - Continue organic/social/digital storytelling

● **Selected Priority Markets:**
  - At the first signs of positive travel news, begin promoting partner destinations via USA campaign in Priority 1 markets
  - Include product and call to action of selected tour operators and OTAs to drive bookings
  - Incentivize tour operators and OTAs to utilize our itinerary programs and other beyond the gateway products
FY20/FY21 Recovery Plan: Rebuilding

- Introduce Priority 2 and Priority 3 markets based on available funding and data
- Build on the most successful campaigns to include as many destinations as possible
- Re-introduce higher funnel inspiration
Item 6

Kyle Edmiston
Chair
Finance Committee

Donald Richardson
Chief Financial Officer

Finance Committee Report

- FY2020 Q2 Financials and IRS Audit
Brand USA met the FY2020 ESTA Match earlier than any prior fiscal year and is in a strong financial position.

Brand USA has rigorous Cash Management Policies:
- Ongoing Budget Management
- Existing Contract Review
- Careful consideration for new obligations and projects
- Constant outreach to contributors regarding the General Limitations in the Letters of Agreement, particularly for timing and markets

Brand USA is prioritizing sound fiscal policy to ensure that it is able to enact a robust recovery campaign when the conditions for international travel are improved.
Governance & Nominating Committee Report

- Board of Director Appointments
  - Official of State Tourism Office
    - John Edman not eligible for reappointment
  - Small Business or Retail Sectors
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  - Travel Distribution Services Sector
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Item 8

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

## Future Meetings Schedule

- Long-term Strategic Planning Postponed
- Q4 FY2020 - Portland, OR  
  - July 28-29, 2020
- Q1 FY2021 – Washington, DC  
  - November 16-17, 2020
Questions & Answers
Closing Remarks
Thank you!