



# Creating Brand SILOVAKIA

INTERNATIONAL CONFERENCE

November 19, 2013 Sheraton Hotel, Bratislava

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Under the auspices of the Ministry of Transport, Construction and Regional Development of the Slovak Republic

# O<sub>2</sub> prekonalo 1,5-miliónovú hranicu

Neustále prinášanie nových produktov a služieb zákazníci ocenili, O₂ slávi ďalší dôležitý úspech

Po viac ako šestročnom pôsobení na slovenskom trhu dosiahlo O2 už 1,5 milióna zákazníkov. Férový a transparentný prístup, ako aj neustále prinášanie noviniek na trh, oceňuje stále viac a viac zákazníkov. O2 chce rásť aj naďalej a preto prináša svojim zákazníkom atraktívne služby a produkty po celý rok. Prečítajte si ďalej, v čom všetkom ste s O<sub>2</sub> boli prví.

# 1,5 MILIÓNA JE PRE NÁS POCTA. ĎAKUJEME VÁM!

Čo robiť, aby takéto množstvo ľudí bolo spokojných so službami O<sub>2</sub>? K úspešnému míľniku O2 v jeho histórii sa vyjadril generálny riaditeľ Ramiro Lafarga.

### Čo pre vás 1,5 milióna zákazníkov znamená?

Je to hlavne veľký záväzok do budúcnosti. Chceme prinášať všetky skvelé služby a novinky ako doteraz. Z pohľadu biznisu chceme predsa

rásť. Pre mňa osobne je však dôležitejšie mať spokojných zákazníkov. A my ich máme dlhodobo najspokojnejších spomedzi všetkých operátorov.

### Prečo toľko ľudí využíva Vaše služby?

Na začiatku cesty sme chceli priniesť to, čo tu chýbalo. Zákazníci nedôverovali operátorom. Považovali ich služby za neprimerane drahé. Ponuka bola komplikovaná a nezrozumiteľná. Operátori podmieňovali a niektorí stále pod-

mieňujú svoje ponuky rôznymi háčikmi a obmedzeniami. Preto sa našimi základnými hodnotami stali férový a transparentný prístup, zrozumiteľné portfólio produktov a samozrejme atraktívne ceny. Podľa nás je to jedi-

ZÁKAZNÍKOM

ná cesta ako si zákazníka získať. Toto napríklad lacnejšie cestovanie

To je veľmi jednoduché. Ak by sme mali nespokoj-

ných zákazníkov, ich počet by klesal. Nám však približne každé dva roky pribudne pol milióna nových zákazníkov. Samozrejme, máme zároveň prepracované metódy ako merať zákaz-nícku spokojnosť, ktoré nám dovoľujú detailne sa zamerať na jednotlivé oblasti maximálnej spokojnosti zákazníkov. Základné pravidlo však je, že výhody sú pre všetkých, ak ich majú noví, musia ich mať predsa aj tí, čo sú s nami dlhšie.

Dávame zákazníkom to čo reálne potrebujú a využívajú. U nás meriame spokojnosť zákazníkov tak, že sa ich permanentne pýtame, čo potrebujú a snažíme sa im maximá-

# sme však časom ešte viac vylepšili. Zákazníkom už nedávame len to, čo si zaplatia, ale aj niečo navyše. či už v podobe bonusu k mobilným službám alebo v podobe iných výhod, ako je

### Podľa prieskumov sú Vaši zákazníci najspokojnejší, dá sa vôbec spokojnosť merať?



pre všetkých, ak ich majú noví, musia ich mať predsa aj tí, čo sú s nami dlhšie.

> Ramiro Lafarga generálny riaditeľ O

# **ROVNAKÝ PRÍSTUP K STARÝM AJ NOVÝM**

## S O, VOLAJÚ ZÁKAZNÍCI DO EÚ ZA SLOVENSKÉ CENY!

O<sub>2</sub> umožňuje telefonovať za slovenské ceny do krajín Európskej únie všetkým zákazníkom programov O<sub>2</sub> Paušál, O<sub>2</sub> Fér a O<sub>2</sub> Moja Firma. O<sub>2</sub> rozšírilo túto výhodu na všetky krajiny EÚ. Ponuka samozrejme platí pre nových aj existujúcich zákazníkov automaticky a bez nutnosti aktivácie alebo poplatkov. Rovnaké ceny ako na Slovensku platia aj pre odosielanie SMS správ z uvedených programov.



# <u>Prvý paušál bez obmedzení prišiel</u> **VOLANIA, SMS BEZ OBMEDZENIA AJ DO VŠETKÝCH KRAJÍN EÚ**

# VIANOCE PO CELÝ ROK A PRE VŠETKÝCH! S O<sub>2</sub> FÉR VOLÁTE UŽ PO MINÚTE ZDARMA

Všetci zákazníci s najpopulárnejším programom O<sub>2</sub> Fér môžu volať na 1,5 mil. telefónnych čísel v sieti  $\rm O_2$  zadarmo už po 1. minúte! Zmena je automatická a bez potreby akejkoľvek aktivácie. Výhodu získajú zákazníci predplatených alebo fakturovaných služieb a bez nutnosti akého-

# ĽUDIA SI PRENÁŠAJÚ ČÍSLA RÝCHLEJŠIE AJ VĎAKA O

### O, NETRESTÁ ZÁKAZNÍKOV POPLATKAMI

O<sub>2</sub> od príchodu na trh tvrdí, že telefónne číslo patrí zákazníkovi. Zároveň sa zasadilo za rýchleiší prenos telefónneho čísla na súčasné 4 dni. O správnosti tohto kroku svedčí aj vyše 600 tisíc prenesených SIM kariet do O<sub>2</sub> od spustenia automatickej prenositeľnosti telefónneho čísla v roku 2008. O₂ nepodmieňuje prenos čísla žiadnymi poplatkami a dlhodobo kritizuje konkurenciu za pokutovanie zákazníka, ktorý sa rozhodne pre lepšiu ponuku.



# VYBERTE SI SVOJ EXTRA DEN S O<sub>2</sub>

Veľký úspech si zaslúži veľké oslavy. O₂ prináša všetkým zákazníkom Extra deň - volania, SMS a MMS v sieti O<sub>2</sub> Slovensko na deň zdarma. Stačí si vybrať jeden deň od 14. novembra do 15. decembra 2013 a poslať bezplatnú SMS v tvare EXTRADEN na 99222. Zákazník si tak od momentu aktivácie až do polnoci tohto dňa môže užívať svoj Extra deň s O2.

# 3G SIEŤ OD O, PRE 56,4% SLOVÁKOV

O<sub>2</sub> začalo od roku 2011 postupne zapínať svoju vlastnú 3G sieť. Aktuálne ňou pokrýva viac ako polovicu populácie Slovenska. Do konca roka pribudne ďalších 60 lokalít, čím sa pokrytie rýchlou 3G sieťou zvýši na 56,4 %. Rozširovanie 3G siete je dlhodobou stratégiou spoločnosti, O<sub>2</sub> v nej chce ďalej pokračovať.



# O<sub>2</sub> - TECHNOLOGICKÝ LÍDER AKO PRVÍ MOHLI PLATIŤ MOBILOM ZÁKAZNÍCI O

Vďaka spojeniu  $O_2$  a Tatra banky je od za-čiatku roka 2013 možné v obchode zaplatiť mobilom bez prídavných zariadení. Prostredníctvom služby  $O_2$  Karty v mobile a jej prepojením na bežný účet klienta v Tatra banke sa mobilný telefón stáva platobnou kartou. Nová služba tak umožňuje platiť priamo svojim mobilom bezpečne, ľahko a rýchlo.



# O<sub>2</sub> AKO PRVÝ OPERÁTOR PRINIESOL NAJRÝCHLEJŠÍ MOBILNÝ LTE INTERNET



prvý mobilný operátor na Slovensku nielen úspešne otestoval technológiu LTE a už v roku 2012 ako prvý prevádzku LTE síete vo vybraných obciach západného Slovenska. Ich obyvatelia tak môžu surfovať rýchlosťou až do 100 Mbit/s Šťahovanie z internetu neobmedzí ani dátový limit, ktorý v balíčku obsahuje až 100 GB pred-

# O, ŠTYRIKRÁT PO SEBE OPERÁTOROM ROKA

 $O_2$  v prestížnej ankete "TECHBOX roka", v ktorej zákazníci hlasujú za najlepšieho operátora. Výsledky potvrdili, že princíp férovosti a transparentnosti oceňujú aj samotní





JAKE SLEGERS
Executive Director of
AmCham Slovakia

Dear guests,
Welcome to the "Creating
Brand Slovakia" conference.
This is the second year that
AmCham organizes a tourism
related conference. The reason
behind it is simple: AmCham

truly desires for Slovakia to become an attractive and preferred destination for foreign and domestic tourists as well as for foreign and domestic investors. To meet this vision, Slovakia needs a brand with quality content and new standards for the tourism industry along with unique products which are beneficial for all the stakeholders involved. Therefore, AmCham decided to end its initiative: "2013: AmCham Year of Regional Development" with this particular conference.

We dedicated this year to regional development as well as to the branding of Slovakia because we believe that these two go hand in hand. Our aspiration this year has been to be more active in the regions

but also to help to connect various leaders in the regions. Hence, we created a platform through which we provided these various stakeholders including destination management organizations, mayors of towns and cities, and tourism-related NGOs with information relevant for their work and further development.

The questions we would like to address during the conference include: Does Slovakia have a brand? If so, what is its content? What are we promoting? What can help sell Slovakia as a tourism and FDI destination?

Given that the law on support of tourism was amended and passed by the government, we think it is time for all of the stakeholders to cooperate and build a unique product called "Slovakia." AmCham is ready to offer help and support. As we think it is necessary to lead by example, we have created a series of videos with CEOs of some of the top AmCham member companies which are also representatives of major investors in Slovakia in various industries. We hope that these videos will prove that it is indeed possible to promote Slovakia in a creative yet accessible way. It is our hope that Slovakia will be presented abroad not only through its logo, but also through a wellthought-out and attractive campaign.

Take Slagus



ZUZANA MIKULÁŠOVÁ Leader of "2013: AmCham Year of Regional Development"; Marketing Director of Welba, s.r.o

Dear guests, It is my pleasure to welcome you to this year's Tourism Conference. The conference will focus on an exciting and often discussed topic: "Creating Brand Slovakia."

Our objective is to answer two key questions. First, what does it take to create a brand for a country? And second, what does Slovakia represent and what does the country stand for?

Described as a "fairytale country" in 2008, the latest spot on Eurosport shows Slovakia as a friendly country

that you will fall in love with and will be "BFF" -- Best Friends Forever."

Lonely Planet ranked Slovakia as the 5th in the world, among the up-and-coming countries in 2013. According to Lonely Planet's team of travel experts, authors, commissioning editors and selected members of the travel community, Slovakia was ranked highly for its culture, natural beauty and off-the-beaten-track attractions.

After 20 years of its existence, Slovakia is still perceived abroad as a former Communist country, the less famous and desirable half of the former Czechoslovakia.

According to a recent brand survey done by The Anholt-**GfK Roper Nation Brands** Index, Slovakia is perceived as an unknown, invisible, and – by countries with the largest economies in the world - "irrelevant" country. The survey warns that Slovakia faces "the absence of a clear brand, lack of clearly recognized niches in the various socio-economic and cultural domains." (The Analytical Report done by the Comenius University in Bratislava, Faculty of Social and Economic Sciences in 2012)

Quoting further from the report: "A Little Big Country, as a country branding slogan, does not arise curiosity among potential tourists". So a clear branding strategy needs to first identify its target markets, starting with tourists, investors, day-trippers/sightseers/ shoppers or skiers/hikers, and then work on the elements that make Slovakia most desirable to each target group. Today, Slovakia is still a young, ambitious country searching for its own identity and brand to enhance its external reputation. The American Chamber of Commerce decided to dedicate the year 2013 to the development of Slovak regions focusing on various aspects including development of tourism, inflow of FDI and the support of small and medium sized enterprises.

2013: AmCham Year of Regional Development initiative focuses mainly on the topics of branding and creating a major presentation of Slovakia for external audiences. The aim is to create a communications platform within the AmCham Tourism Committee, to engage all relevant parties in the evaluation process. Its purpose is to kick off general and focused discussions concerning Slovakia's brand

online and offline, to evaluate the necessary framework, including legal aspects, as well as all matters that influence the developments within the tourism industry, such as employment and training or targeted campaigning.

We firmly believe that Slovakia has an enormous potential and untapped resources for a significant tourism development, as a year-around destination. The overall success of our efforts will be measured by the number of satisfied and returning visitors. That success will depend on the choice of well-defined quality products and services which meet the needs and wants of all target groups.

I wish you all a successful Tourism Conference 2013, with fruitful and constructive discussions and contributions to reach our overall objective – to bring tens of thousands of new and returning visitors to our Slovakia.

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### 08.30 - 09.00**REGISTRATION & LIGHT BREAKFAST**

### **OPENING & WELCOME** 09.00 - 09.10



Jake Slegers, **Executive Director of American** Chamber of Commerce in the Slovak Republic

"2013: AMCHAM YEAR OF REGIONAL DEVELOPMENT" 09.10 - 09.20

Video Series with CEOs of Leading Foreign Investors in Slovakia

### PANEL 1: CREATING BRAND SLOVAKIA: "WHAT IS IT ALL ABOUT?" 09.20 - 11.00



Peter Littmann. Founder, Chairman and CEO of BRANDINSIDER, Germany

KEYNOTE SPEECH





Martin Horváth. CEO and Consultant, **Branding Slovakia** Consultancy



Tatiana Böhmerová, Client Partner Senior, TNS Slovakia



Zuzana Mikulášová, Leader of "2013: AmCham Year of Regional Development" MODERATOR



Michal Pastier, Naming Creative Director, Big Name Theory



Adela Banášová, TV Guest

**COFFEE BREAK** 11.00 - 11.20

### PANEL 2: CREATING BRAND SLOVAKIA: "HOW CAN WE DO IT?" 11.20 - 12.30



Ivana Magátová, General Director of the Tourism Section; Ministry of Transport, Construction and Regional Development of SR



Elena Mallicková, **Head of Public Diplomacy** Department; Ministry of Foreign and European Affairs of the Slovak Republic



Oľga Gyárfášová, Associate Professor, Faculty of Social and Economic Sciences, Comenius University



Igor Donoval, Head of Analysis and **Tourism Products** Department, Slovak Tourist Board



Denisa Zlatá, Project Manager, Ministry of Culture of the Slovak Republic



Kežmarský štít

Zuzana Mikulášová, Leader of "2013: AmCham Year of Regional Development"

Peter Littmann, Founder, Chairman and CEO of BRANDINSIDER, Germany

**MODERATOR** 

LUNCH 12.30 - 13.15

### **WORKSHOPS** 13.15 - 15.15



Tomáš Peťovský, Industry Manager, Google



Michal Blažej, **Business Development &** Partner, Lighting Beetle

Slávkovský štít Gerlachovský štít Bradavica Končistá Veľká Svišťovka





We want Slovakia to be an attractive and desired country for foreign and domestic tourists. To meet this vision, the country needs new standards for the tourism industry along with unique products to benefit all the stakeholders involved. A profitable tourist industry should be an apolitical priority of the Slovak Government regardless of political party.

Slovakia can create a successful tourism industry by developing a long-term strategy, created and managed by an independently-funded umbrella organization. This organization should develop both the strategy and standards necessary to continuously improve the quality of services and marketing as well as continuous measurement of strategy implementation and evaluation of the successes in achieving the objectives.

We believe that the role of the state is not to develop tourism but to create and develop the framework requirements to enhance tourism and to support a business environment in which tourism activities operate and can improve. The government should be responsible for the communication of the importance of Tourism for Slovakia and the measures, which the state will implement to create a "pro tourism environment". AmCham's Tourism Committee is willing to help and to bring its expertise to the points mentioned in this document.

National system for	or quality assurance Use	e social media	Castles, chateaus	Get bipartisan	support from the Parlia	ment
Transfer know- how from abroad	Cooperation with business community	Understa Destinati	and the work and function on Management Organ	on of izations	TOP attractions - Cit Country highlights	y and
Agro Tourism Use new technologies for marketing & sales Make Slovaks to be proud about Slovakia Statistics						
European Capital Culture: Košice 20			artnerships on the l foreign levels	Lower VAT in tourism	rate Nature (hill walking)	king,
EU Strategy for th	e Danube Region	Promote bike/gi	reen tourism	Create legislati	ion for seasonal employ	ment

What does Slovakia stand for? Who comes to visit Slovakia? What motivates people to visit Slovakia? Where do we find new visitors of Slovakia?

What are the specific or mixed products to offer to different segments: families with children, students, seniors or to groups which look for adventure or modern art?

Is promoting buildings, monuments, historical castles or national parks enough? Where are emotions when promoting destination Slovakia?

How can Slovaks be encouraged to spend holidays in Slovakia?

Who is collecting relevant information from and about tourists and tourism organizations related to tourism?

Who is analyzing the data and using stress tests of the specific strategies?

Who is interpreting the collected data about tourists visiting Slovakia?

Where is the information? Is it a continuous process?

What can be done to bring more revenues to the local tourist destinations?

We need the above-mentioned information to formulate a strategy. We will pro-actively seek the answers to these questions together with all the relevant stakeholders throughout the year 2013.

# AmCham's six priorities for tourism:

### 1. Brand Slovakia

- Create a unified presentation of Slovakia abroad, tourism and investment related, with input from all stakeholders.
- Develop main tag lines for every year as a derivate out of unified communication principles, and focus the promotion of Slovakia based on that. Cultural and sport events, music festivals, historic monuments and sites, medical spas will be promoted according to the complex matrix in which markets and tourist preferences are combined. Bratislava has to be clearly promoted and become a central point of communication for the country. Due to budget constraints, we should utilize social media and other interactive technologies. The communication strategy has to be developed and implemented as soon as possible and has to take into account Slovakia's Presidency of the EU in 2016.

### 2. Visitors

- Clearly differentiate initiatives supporting the growth of domestic and foreign tourism.
- Define source markets for each type of tourism.
- Identify the key markets based on updated segments.
- Change visa policy in line with EU Schengen rules and support policies to ease visa requirements for tourists.
- Collect quality data about the visitors.

### 3. Services

- Create standards and develop quality assurance and monitoring systems.
- Create programs to improve the quality of services through education, training programs, advanced training.
- Evaluate the tourist information offices around Slovakia and centralized points for information and suggest improvements.
- Create one unique on-line website for marketing, presentations, navigations, accommodation booking, travel guidelines, events, and information about regional products.

### 4. Infrastructure

- Identify and create program for infrastructure improvements accessible through EU funds.
- Focus on completion of infrastructure, highways, railroads, cycling trails.

### 5. Products and Packages

- Identify the key attraction points in Slovak regions. People should get to vote on the main attractions or provide ideas for new ones.
- Present these particular attractions in all PR and marketing activities and materials. The regions should focus on the regional development strategy to encourage Slovaks to spend their holidays in Slovakia.
- Inform potential entrepreneurs about the attractions and products which are missing. Product and packages have to be developed by the tourism industry itself, though the framework in which it will be operating needs to be prepared by the government.
- Communicate the new products and packages and provide support if required.

# 6. Cooperation among stakeholders and institutional support

- Improve cooperation and communication among all the stakeholders in tourism sector. Cooperation among stakeholders is one of the most important prerequisites for the future of tourism in Slovakia.
- Unify presentation of Slovakia for foreign visitors, with support from the Ministry of Transport, Construction and Regional Development; Ministry of Culture; Ministry of Education, Research, Science and Sport; Ministry of Foreign and European Affairs, Ministry of Agriculture, Ministry of Finance, Ministry of Economy, Ministry of Health, Slovak Tourist Board, DMOs in the regions, Slovak Embassies abroad, people and schools.

### **TOURISM IN THE WORLD IN 2012**

In 2012, revenue from tourism worldwide reached 1.3 trillion. USD (revenue from

international tourism + revenue from international passanger transport), representing



an average of 3.5 billion USD daily.

**Tourism** (including passenger transport) represents 30% of world

service exports and 6% of world exports of goods and services.

As an export category, tourism ranks in the fifth place in



international trade, following trade of fuels, chemicals, food and automobiles.



In 2012, the number of tourists worldwide exceeded the threshold of one billion for

the first time in history, when it reached 1 035 million. This represents an increase of 4% in comparison to 2011.

Source: UNWTO

### **TOURISM IN SLOVAKIA IN 2012**

In 2012, Slovakia was visited by 3,774,062 tourists. of which 1,527,500



were foreign and 2,246,562 were domestic. Compared to the year 2011, there was an increase of 5.7% (increased

by 202,969 tourists). The number of foreign visitors has increased by 4.6% and the number of domestic visitors has increased by 6.4%.

The overall amount of overnight stays of tourists in 2012 increased by 3.6% from



10,524,738 to 10,908,200. The number of overnight stays of foreign tourists in 2012 was recorded at 4,101,201, which is an increase by 1.5% compared to 2011. Number of overnight stays by domestic tourists was 6.806.999, an increase by 4.9% compared to 2011.

•••••

Revenue from active

foreign tourism reached 1789 million Eur in 2012.

Compared to 2011, it increased by 2.5%.

**Expenditures** of Slovak tourist were reported



at 1,666.3 million Eur in 2012. Compared to 2011, it increased by 6.4%.

789

million €

Balance of foreign tourism has been active at 122.6 million Eur.

Compared to 2011 it has

decreased by 31.1%.



The share of **income** from active tourism represented 2,5% of Slovak GDP

in 2012; the same amount as in 2011.

> Source: Statistical Office, National Bank of Slovakia

## **TOURISM** IN SLOVAKIA IN THE **FIRST HALF OF 2013**

In the first half of 2013 we registered in Slovak accomodation facilities



1 892 805 guests, a 10.9% increase in comparison to 2012. This represents an increase by 186 589 guests and 5 165 037 overnight stays and 9% increase in comparison to 2012.

•••••



A total of 771,262 foreign tourists visited Slovakia in the first half

of 2013, which is a 16,1% increase in comparison to the same period of 2012. This represents a net increase of 107,120 foreign tourists vs. the first six months of 2012. In total they spent 2,002,458 overnight stays, which is a 11,5% increase vs. the same period last year.

In the first half of this year, Slovaks spent 3 162 579 nights in tourist accommoda-

tion establishments in Slovakia, which is 7,5% more than last year, out of which 1 121 543 vacationed at home. This is 7,6% more than in January-June of last year. The number of home tourists has increased



by 79 469.

The majority of foreign visitors came from the Czech Republic (210,025),

million

Poland (83,452), Germany (68,978), Ukraine (49 111), Hungary (36,122), Austria (33,022), Russia (27,512), Italy (24,063) and the United Kingdom (23,846).

Revenue from active tourism for the period of January - June 2013 reached

868.8



million Eur. This represents a 4,8% increase in comparison to the same period in 2012.

million €

**Expenditures** of Slovak citizens in the monitored period reached 811,7 million

Eur, which represents a 6,8% increase vs. the same period in 2012

**Balance** of foreign tourism has been active in the amount of 57 million Eur,



however it decreased by 17.4% vs. the same period in 2012.

In the first half of 2013, the share of income from active tourism on the country's

GDP reached 2.5%, while in the same period in 2012 it was 2.4%.

> Source: Statistical Office, National Bank of Slovakia

Data provided by Eliška Romanová, Ministry of Transport, Construction and Regional Development of



"Oslavujte s nami" "Celebrate with us"

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