

Brașov 2034

PUBLIC SUMMARY

OMD BRAŞOV

Tourism Development and Marketing Strategy of the Brașov Destination 2027–2034

Public summary

BENEFICIARY

Brașov Destination Management Organisation Association (OMD Brașov)

PROJECT TEAM

BrandBerry srl (lead partner) · Horwath HTL România · GMP CommUnity

WHY THIS STRATEGY

A destination that grew in volume and wants to grow in value

In two decades Brașov has become Romania's most visited historic mountain city: arrivals have almost quadrupled since 2001, winter is a full season rather than a peak of a few weeks, and the city's image is the strongest of all the destinations tested in the national survey. The data also show the other side: each visitor stays for a shorter time, the bed-place occupancy rate of accommodation is now at the level of 2001, and the historic centre, Tâmpa and Poiana Brașov feel the pressure on the same days and at the same hours.

The Tourism Development and Marketing Strategy for the Brașov Destination 2027–2034 starts from this finding. It does not aim at more tourists at any price, but at more value from every visit: longer stays, a whole year in use, neighbourhoods, resort and region included, and a city that remains, above all, its residents' own.

This magazine summarises Volume I. Each page points to the full document, and the last page shows where to find the documents.



Stage I consultation: twelve workshops with operators, institutions, associations and residents, June–July 2026.

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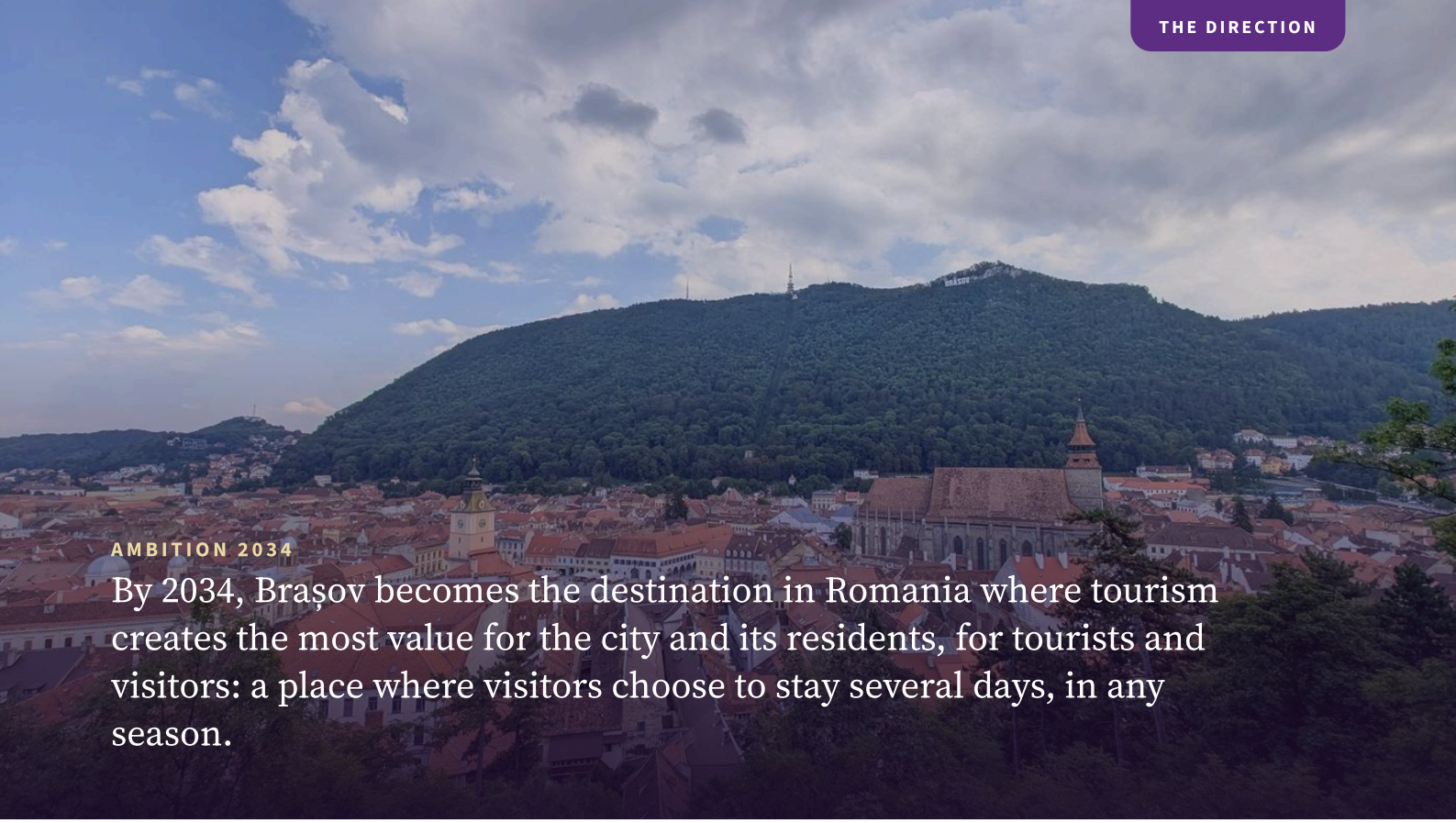


AMBITION 2034

By 2034, Brașov becomes the destination in Romania where tourism creates the most value for the city and its residents, for tourists and visitors: a place where visitors choose to stay several days, in any season.

The 2034 ambition and the purpose of the strategy

PURPOSE

Increasing the value that tourism brings to Brașov and its residents: a significant increase in the number of customers of licensed businesses that meet the city's quality criteria, and a sustainable increase in the number of tourists, within the carrying capacity of the city, the resort and the surrounding nature.

TWO HEADLINE KPIS, REPORTED TOGETHER

Residents' acceptance of tourism
measured every two years from 2027; never below the 2027 level

Visitor satisfaction
firm recommendation rises from 76.7% to at least 80%

Growth counts as a success only if both stay high while the value per visitor rises.



THE DIRECTION

Vision and positioning

VISION 2034

By 2034, Brașov takes on the role of capital of the Carpathians and is recognised as such in Europe. The cosmopolitan city of the mountains, from which the visitor reaches nature, Poiana Brașov and the Carpathians easily, without a car and in any season, stays several days and leaves with a new friend, Brașov.

The people of Brașov support tourism because they see its benefits. “Capital of the Carpathians” is said with evidence: the gateways to the Carpathians reachable without a car, the mountain rescue service, European-level events, the hub of the Transylvanian triangle. Brașov is an international destination: it does not compete with any destination in Romania, but measures itself against the urban and mountain destinations of Central and Western Europe, with Vienna as its aspirational benchmark for quality of life. Two thirds of the marketing actions and of the promotion budget are directed at foreign tourists from the markets with direct access, by air, by night train and by road, so that the 2.0-night stay (2.2 as the threshold of ambition) is achievable.

THE MISSION

OMD Brașov, together with the City Hall and the Local Council, with other public authorities and with the tourism operators, manages Brașov as a single destination: it coordinates the offer, the calendar and visitor information, welcomes the visitor to the same standard wherever they enter the destination, measures the effects of tourism on the city and its residents, and directs the value produced by tourism towards the city, the resort and nature.



THE POSITIONING

“Brașov is your friend in Transylvania.”

The promise: “Brașov, your friend in Transylvania”: in Brașov you have a friend, a local who greets you and helps you discover the city of many cultures, the mountain that starts in the city and the Transylvania around it. Tone of voice: the map of the greeting; personality: the greeting “Servus”. Your friends in Transylvania: the guides, instructors and service providers curated and continuously trained by the DMO. In the positioning, Dracula is said without being named, through the Count’s letter: “My Friend… Welcome to the Carpathians”.

The values, from the greeting map: welcome (hospitality, the city open to other cultures), recognition (pride without arrogance, solidarity), trust (safety, inclusion) and reciprocity (respect, friendship); the brand personality: the Transylvanian greeting “Servus”, hospitality in its most elegant form, an “I am here so that you feel at ease” said to the guest.

THE DIRECTION

How the strategy is built

1 **12 key challenges**
PR1–PR12, from official data, the national survey, reviews, the integrated diagnosis and the consultation

2 **Vision · Mission · Positioning**
the direction of the destination

3 **Ambition 2034 and Purpose**
two headline KPIs: residents' acceptance, visitor satisfaction

4 **5 strategic objectives**
value · all year, whole territory · residents · visitors · partnership, data, nature

5 **21 development objectives**
each with an indicator, a baseline and targets for 2030 and 2034

6 **7 key policies + 6 horizontal policies**
mobility and centre · nature · Poiana · gastronomy · culture · business · accommodation; marketing plan

7 **392 measures, 119 key measures**
Annex 1, the 2027–2034 implementation plan, with owner, horizon and priority

8 **Implementation, monitoring, evaluation**
destination observatory; mid-term evaluation in 2030; final evaluation in 2034



THE DIRECTION

Five strategic objectives, with 2034 targets

OS1 More value from every visitor

value added from tourism of RON 787 million in 2034, against 535 in 2025; a stay of at least 2.0 nights; at least 900,000 arrivals in licensed accommodation

OS2 A destination used all year and across its whole territory

occupancy of at least 37%; spring with at least 23% of overnight stays; in Poiana, winter's share of the resort's overnight stays falls by a fifth from 2027, through the growth of the other seasons

OS3 Tourism accepted and supported by residents

the acceptance index never below the 2027 level; the historic centre stays inhabited; tourism's contribution to the local economy is measured

OS4 Visitors satisfied with a quality experience

recommendation of at least 80%; review score of at least 4.50

OS5 A destination managed in partnership, on data, with a controlled impact on nature

the DMO mandate approved by its General Assembly; 12 key data series; the revised Tâmpa plan; operators report water, energy and local products



THE DIRECTION

Each policy serves several objectives

	OS1 VALUE	OS2 ALL YEAR, WHOLE TERRITORY	OS3 RESIDENTS	OS4 VISITORS	OS5 PARTNERSHIP, DATA, NATURE
1 Mobility and the historic centre	●	●	●	●	●
2 Nature and active tourism	●	●	●	●	●
3 Poiana Brașov	●	●	●	●	●
4 Gastronomy	●	●	●	●	○
5 Culture and the living city	●	●	●	●	○
6 Business tourism	●	●	●	●	○
7 Accommodation	●	●	●	●	●
S1 Longer stays	●	●	○	●	○
S2 Destination calendar	●	●	●	●	○
S3 The DMO as a link	●	○	●	○	●
S4 Information, digital, data	○	●	○	●	●
S5 Identity and brand	●	○	●	●	○
S6 People and skills	●	○	○	●	●

● main contribution ● secondary contribution



BRAȘOV TODAY

A loved city, with room to grow

715,064

registered arrivals in classified accommodation, 2025

project team's data-based assessment: about 1.1 million tourists a year

1.84

nights, average length of stay, 2025

down from 2.62 nights in 2001

33.2%

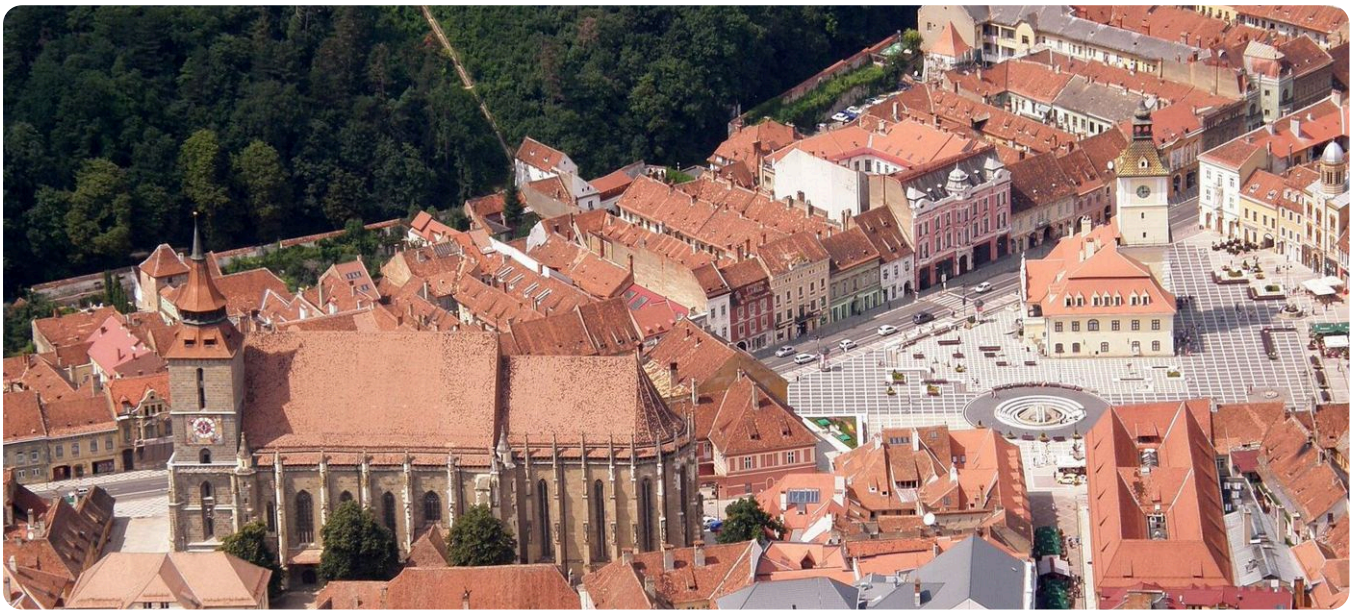
bed-place occupancy rate, 2025

at the 2001 level (33.7%): bed capacity grew as fast as overnight stays; arrivals, 3.93 times

86.9%

of Romanian travellers find Brașov attractive

the strongest image among the 15 destinations tested



Source: National Institute of Statistics; the project's national survey; the project team's data-based assessment. Official statistics and the team's assessment are presented side by side in Volume I: about 1.1 million tourists and about 1.6 million same-day visitors, a pressure of about 2.7 million visits a year.

BRAȘOV TODAY

What the data say

A strong image, to be widened

The spontaneous image is dominated by the mountains (29.1%), the Black Church (19.1%) and Poiana Brașov (14.0%). Gastronomy (4.9%) and events (2.3%) are almost absent.

Official statistics see only part of tourism

Official statistics: 715,064 arrivals. The project team's data-based assessment: about 1.1 million tourists and about 1.6 million same-day visitors, that is about 2.7 million visits a year; statistics cover about a quarter of them. Around 2,295 short-term rental listings are active on platforms, against roughly 1,100 classification certificates.

Integrated diagnosis: 2.54 out of 5

The strengths are resources and image: nature, heritage, positioning, accommodation capacity. The weaknesses are conversion and operation: the value of demand, capacity use, mobility (1.95), the apartment regime, data and coordination.

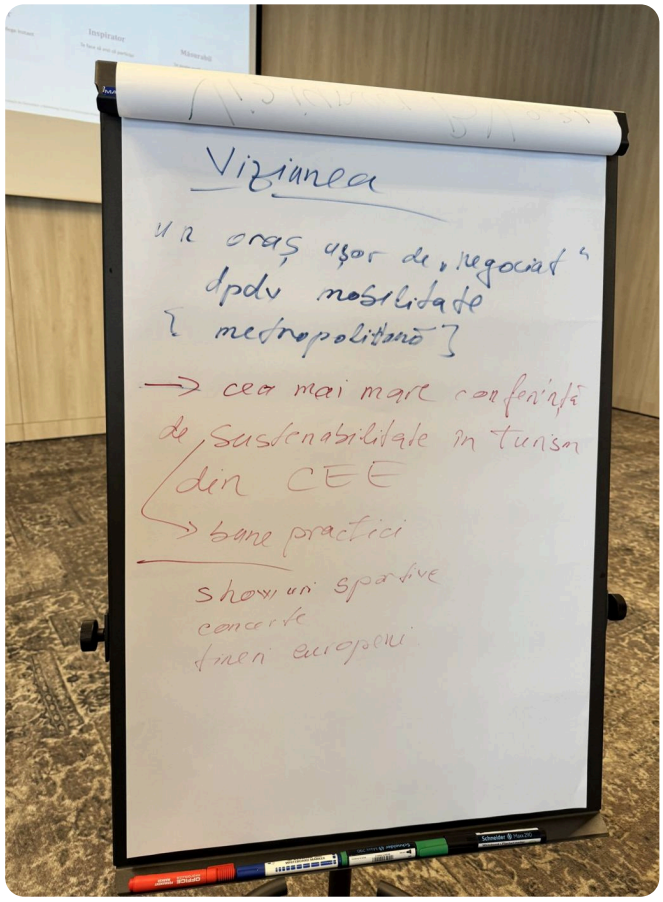
What the city says

22
interviews, 24 participants

12
group consultations

148
themes identified

- Nature is the most frequently named asset: 21 interviews and 9 workshops.
- Coordination of the destination is the theme named most often (15 interviews, 10 workshops), followed by traffic and parking (14 interviews, 10 workshops).
- A destination management organisation working as a platform and a link is proposed in all 12 workshops.
- Seven of the nine themes named in at least half of the interviews had already been formulated in 2018: they are known and expected, and the strategy puts them on a plan, with an owner and a deadline. The emphasis therefore falls on implementation and on who is responsible.



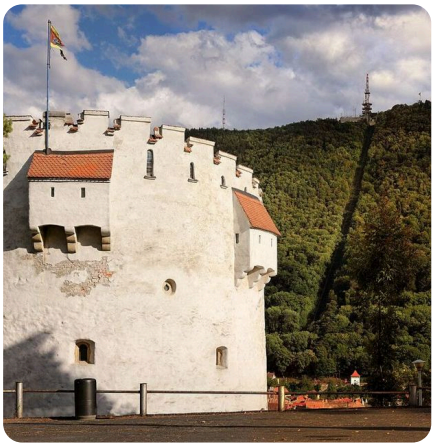
The vision written by participants at one of the workshops.

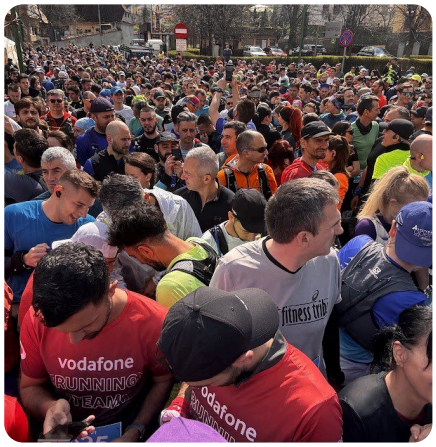
BRAȘOV TODAY

Twelve lines of work, starting from what works

- **PR1** The value of demand: more nights, more spending per visit
- **PR2** Using the capacity in the off-season and on weekdays
- **PR3** Mobility and access to the centre and to Poiana
- **PR4** The historic centre, with its traffic, visual order and residents
- **PR5** Poiana, between season and off-season, with its public space
- **PR6** Equal rules for accommodation
- **PR7** Infrastructure for business tourism
- **PR8** Heritage, events and the city alive at night
- **PR9** Gastronomy, to be made visible
- **PR10** Nature, with Tâmpa, wildlife and safety
- **PR11** Governance and data
- **PR12** People and skills







Sport in the city: the start of a mountain marathon in Șchei.

BRAȘOV TODAY

Three scenarios to 2034, measured in value; the strategy chooses growth in value

	2025	A. INERTIA	B. VOLUME	C. VALUE
Direct value added from tourism (RON million, 2025 prices)	535	612	672	**787**
Value added per resident (RON)	2,251	2,574	2,829	**3,314**
Pressure in the peak months (2025 = 100)	100	114	136	**105**
Length of stay (nights)	1.84	1.84	1.80	**2.00**
Occupancy rate	33.2%	33.8%	39.3%	**37.2%**

Scenarios built with the same rules, on the accounts of firms with tourism NACE codes; constant 2025 prices, net of VAT. Method and workbook: brandberry.ro/brasov2034.

WHY GROWTH IN VALUE

- It brings the most value: RON 787 million in 2034, 47% more than in 2025 and 17% more than the volume scenario.
- It does not add crowding: pressure in the peak months rises by 5%, against 36% in the volume scenario; value grows much faster than crowding.
- It stays ahead even if only half applied, on one condition: real spending per night grows by at least 1% a year. In official statistics: at least 900,000 registered arrivals, a stay of at least 2.0 nights and occupancy of at least 37% in 2034.





POLICY 1

Mobility and the historic centre

A centre explored on foot, with parking at its edge, and a Brașov from which the region is explored without a car. The rule: the alternative comes before any restriction.

KEY MEASURES

- The airport–city link: the express bus line, a regulated taxi rank and arrival information, by the summer season of 2027
- No free weekend parking in the historic centre; the Bartolomeu park-and-ride (697 spaces), with an integrated ticket and a shuttle to the centre
- Controlled weekend access only once the alternative works, with coaches at the transfer hubs and dedicated lines to the centre and Șchei; five pedestrian corridors
- Dedicated bus lines to the centre for everyone; the guest card, from three nights: urban transport included, as decided by the City Hall and RATBV, reduced metropolitan fares; signage in English, alongside Romanian, across the whole city

WHAT THE CITY GAINS

Residents: a centre without parking-search traffic, a resident permit valid seven days a week, an enforced 30 km/h limit in the centre and in Șchei, and shared streets on residential streets.





POLICY 2

Nature in four seasons and active tourism

Nature becomes a resource that is accessible all year, protected and safe, from Tâmpa to the park forests and Postăvaru.

KEY MEASURES

- The Tâmpa management plan revised by 2029; a single trail map in 2028, with uniform information at trailheads
- Family cycling paths in the park forests: at least 25 km by 2034
- A twelve-month nature calendar, active-tourism products and communities
- The “Brașov, mountain-bike destination” programme: green beginner trails, lifts open to riders from May to November, the descent from Postăvaru to the Old Town, a trail-network manager
- Landscaped viewpoints with benches and photo installations carrying the destination’s identity; a treetop walk in a park forest outside protected areas; the family cycling route Brașov–Poiana–Râșnov–Zărnești–Bran
- Coexistence with bears, mountain safety and a climate vulnerability assessment of the destination (2028)



An old ski-run marker in the forests of Brașov.

WHAT THE CITY GAINS

Residents: parks with lawns open for rest, relaxation and children’s play, nature close to home, safe and clean trails.



POLICY 3

Poiana Brașov, a premium resort

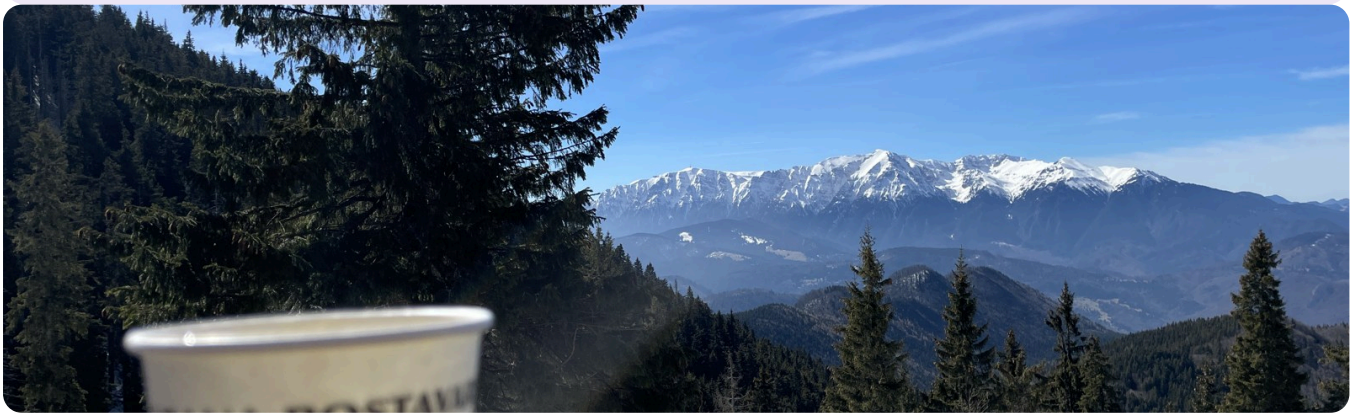
The public space of Poiana reaches the standard of its services: a centre, common rules and reasons to visit in every season.

KEY MEASURES

- The Resort Regulation (2027) and the zonal urban plan (2028), with a compliance score for all businesses by 2031
- The zero zone: the new centre of the resort, with a design code and selected retailers
- Cooperation among operators: joint packages, the “Poiana celebrates the world” programme and the resort’s promotion as part of the destination’s promotion, from the special tourism promotion tax
- The target, for all forms of accommodation in the resort: the winter share of overnight stays falls by a fifth from 2027, through the growth of the other seasons

WHAT THE CITY GAINS

The city gains a resort that represents it: lively, open to residents and visitors, a pleasure for active leisure; the operators’ association becomes an adviser and partner of the local administration, an advisory member in Poiana’s development.





POLICY 4

Gastronomy

Gastronomy becomes a quality benchmark of the destination and links existing demand to the cuisine of Țara Bârsei.

KEY MEASURES

- The reference recipe book of Țara Bârsei and the signature dishes with a common sign: at least 50 venues in 2034
- The short supply chain of local products: at least 100 venues with a verified share of local products in 2034
- Enforcement of the Terrace Guide; contracted breakfast for apartment guests
- The destination quality label, with public criteria: at least 80 venues in 2034; development precedes promotion: gastronomy becomes main market content after the reference book, with 30 labelled venues

WHAT THE CITY GAINS

Residents: a centre without kiosks and branded street furniture, producers' markets, neighbourhood squares alive in the evening.



A sign of tourism of another age: "Vederea frumoasă", a tradition since 1905.



POLICY 5

Culture and the living city

Heritage turns from scenery into story, and the city becomes a lively place in the evening, in the centre and in the neighbourhoods.

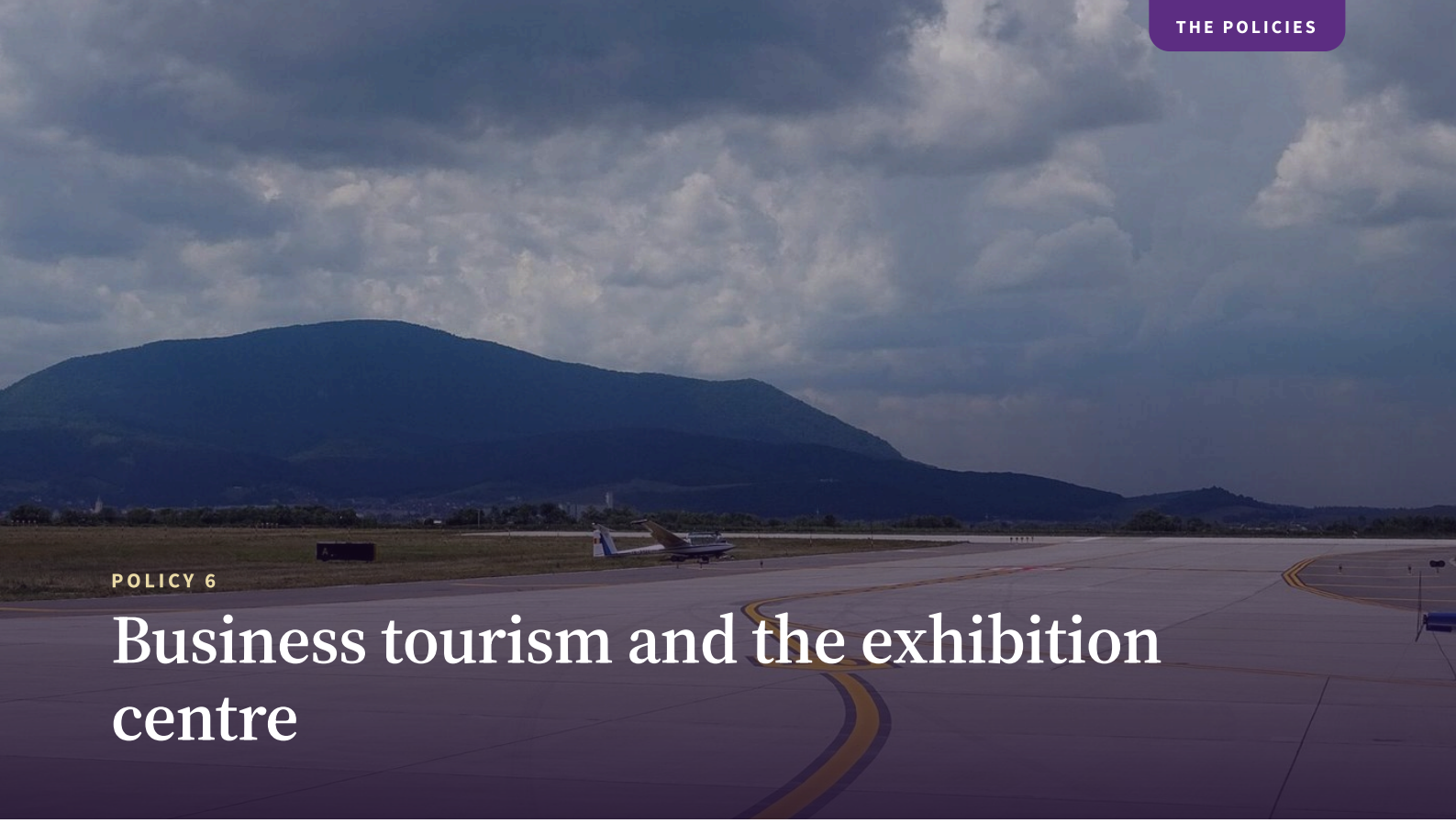
KEY MEASURES

- The Juni custom: the file for the national register of intangible heritage; the 2028 tercentenary as the anniversary year
- The unified visual regime of the historic centre, a protected architectural ensemble, adopted in a single decision, with the Street-level Commercial Communication Code; the housing programme; St Bartholomew's on the trail; neighbourhood centres rebuilt, starting with Bartolomeu
- A joint museum ticket, a single calendar, suitable municipal spaces used for cultural events and activities, living private heritage with the destination's mark
- Industrial heritage inventoried and brought into routes, exhibitions and panels; the "Green Events Brașov" programme for the city's events
- The bid for the European Capital of Culture 2034 title remains a decision of the Local Council

WHAT THE CITY GAINS

Residents: local history told correctly, including in schools; neighbourhoods with a life of their own; cultural participation measured every two years.





POLICY 6

Business tourism and the exhibition centre

Business tourism fills the weekdays and the off-season, when capacity already exists.

KEY MEASURES

- A congress and exhibition centre developed in stages: stage 1 of 20,000 sqm of halls and a congress centre, expandable to 50,000 sqm, after the 2027 feasibility and market study; development up to 100,000 sqm is the local authority's decision
- The site and access corridors reserved in planning documents (2027–2028)
- The DMO convention bureau attracts fairs and congresses; a conference product for weekdays
- The centre's value is its impact on the city's economy, 7–20 times its own revenue; in the chosen scenario, about 200,000 overnight stays and RON 65 million of value added in 2034

WHAT THE CITY GAINS

The city gains international exposure, economic value added for residents and access to novelty and technology.





POLICY 7

Accommodation and tourist apartments

The same rules and the same tax for all forms of accommodation; guidance through incentives, without bans.

KEY MEASURES

- The registration number in every listing, as required by EU law (Regulation (EU) 2024/1028)
- Special tourism promotion tax collected through platforms, simple procedures and a local contact point for hosts
- No day caps and no limit on the number of licences; contracted breakfast links apartment guests to nearby venues
- Target: the ratio of active listings to classified units falls from about 2.1 to 1.05 in 2034

WHAT THE CITY GAINS

The city gains safety and tourists who know the local rules: peace and respect in residential buildings and neighbourhoods.



THE POLICIES

Six horizontal policies link the policies together

S1

Longer stays

a product catalogue by length of stay; resort packages; Brașov as the base of the region

S2

The destination calendar

a single calendar, published a year ahead; the DMO as calendar authority

S3

The DMO as a link

the DMO mandate on destination functions, approved by its General Assembly; the resources of the special tourism promotion tax, under its statute; the annual destination report

S4

Integrated information, digital and data

the same information from booking to departure; the destination observatory, with 12 key data series and a public dashboard from 2028

S5

Identity without kitsch, and brand

visual order in the centre and in Poiana; the destination narrative; the city's story told through public space: street furniture and signage carry the symbols of each area

S6

People and skills

locally recognised guides and storytellers: at least 50 in 2034, in at least five languages; training programmes for hospitality



IMPLEMENTATION

What changes

For residents

- a historic centre without parking-search traffic, orderly and inhabited
- parks with lawns open for rest and play; nature and Poiana reachable without a car
- the resident card and the “tourist in your own city” programme
- neighbourhoods alive in the evening, neighbourhood cultural centres
- acceptance of tourism measured every two years; the economic benefits of tourism measured and published

For businesses

- more customers for licensed businesses
- the same rules for all forms of accommodation
- a longer season: spring, November, weekdays
- the quality label, the recipe book, the signature dishes
- destination data: the hotel panel, the observatory, the dashboard

For visitors

- a predictable airport link and urban transport included, from three nights
- the same information everywhere, in at least three languages
- a true story, told by locally recognised guides
- a Poiana with a centre, rules and reasons to visit all year
- safe trails, a single map, and the region as a day trip



Stage I consultation: twelve workshops with operators, institutions, associations and residents, June–July 2026.

IMPLEMENTATION

Milestones 2027–2034

2027

the DMO mandate approved by its General Assembly; the DMO's planning of the use of the special tourism promotion tax; the parking rules; the resort regulation; the missing baselines measured

2028

the zonal urban plan for Poiana; the single trail map; the public dashboard; the decision on the European Capital of Culture bid

2029

the revised Tâmpa plan

2030

mid-term evaluation: results against interim targets

2031

public trails uniformly marked; Poiana businesses compliant

2034

final evaluation; the basis of the next strategy

More than half of the 392 measures start in 2027 or immediately; most are acts, agreements and programmes, not investments.



IMPLEMENTATION

How success is measured

FOUR SIGNS OF SUCCESS IN 2034

787

RON million of value added from tourism in 2034, against 535 in 2025

2.0

nights, average length of stay (2.2 as the ambition threshold); occupancy of at least 37%

≥ 2027

residents' acceptance of tourism

80%

firm recommendation of the destination

THE TOOLS

The destination observatory

12 key data series, from city-tax overnight stays to the visitor survey and the resident questionnaire; an annual public dashboard from 2028

The economic impact study

the estimated GDP of the municipality and the metropolitan area, the share of tourism and hospitality employment; in 2028, 2031 and 2034

Operators' sustainability reporting

water and energy use per overnight stay and the share of local products in purchases, by a common method, from 2028

Independent evaluations

the 2030 mid-term evaluation can adjust targets and measures; the ambition and the purpose stay unchanged until 2034

IMPLEMENTATION

Who is responsible, and with what resources

WHO IS RESPONSIBLE

Brașov City Hall and the Local Council
the strategy proposes that the Local Council adopt it by decision and take it into account in the city's development strategy and planning documents; the DMO is funded, under its statute, through the monthly transfer of 90% of the revenue of the special tourism promotion tax, with no additional allocation through the adoption of the strategy; local regulations, terraces, advertising, short-term rentals, coach access, events in public space, remain within the powers of the Local Council and the City Hall; the City Hall holds 45% of the DMO votes and approves, in the General Assembly, the destination-functions mandate (2027); the annual destination report is proposed for debate in the Local Council, with corrections decided at the 2030 and 2034 evaluations

OMD Brașov (the DMO)
coordinates implementation, the calendar, information, gastronomy, culture and nature; publishes the annual report

Partners
other public authorities, cultural institutions, the Kronstadt Forest Administration, RATBV, the university, the operators' associations; the DMO coordinates and implements, the City Hall and the Local Council provide the framework, the resources and the continuity, to the extent and in the form they decide

WITH WHAT RESOURCES

The two special taxes
the special tax for the tourism promotion of the Municipality of Brașov, 7 lei per tourist and night, and the special Salvamont (mountain rescue) tax, 5 lei, with uses set by council decision and an annual public report

Public budgets, local and of other authorities
public space, mobility, cultural institutions and museums, mountain rescue

European funds
the 2021–2027 programmes, eligible until the end of 2029, and the 2028–2034 framework

Partnerships
private investment in Poiana, in the exhibition centre and in accommodation; operators' contributions

Every local act is preceded by a legal assessment and public consultation. The strategy tracks 20 risks, with alarm signals and set responses.



Where to find the strategy

This magazine summarises Volume I of the strategy. The full document contains the diagnosis, the direction, the thirteen policies, the implementation plan (Annex 1, 392 measures) and the indicator sheets.

1. Read the summary, Volume I (Volume I), Volume II, with all the measures, and Volume III, the evidence base.
2. Consult the implementation plan, the register of the 392 measures, filterable by policy, objective and owner.
3. Follow the annual destination report and the public dashboard, from 2028.
4. Residents of Brașov and Poiana Brașov are invited to answer the residents' questionnaire, from 2027.

www.brandberry.ro/brasov2034

The strategy, its volumes and the supporting materials are at brandberry.ro/brasov2034.

Image credits. Photographs of the workshops, the Innkeepers' Guild, the Juni, the marathon, the ski marker, the "Vederea frumoasă" sign, the Postăvaru chalet and the sunrise on Postăvaru: project archive (BrandBerry srl). The autumn photographs of the historic centre, Republicii Street, Tâmpa and the Citadel: the "Kevin and Amanda" page (facebook.com/kevinandamanda.fan), with the authors' permission. The other photographs come from Wikimedia Commons and are used under the licences indicated: Panorama of the historic centre from Tâmpa (Andrei Dan Suciu, CC BY 3.0); Tâmpa seen from Council Square (Jorge Franganillo, CC BY 2.0); Mount Tâmpa seen from the city (Jocelyn Erskine-Kellie, CC BY-SA 4.0); Republicii Street, pedestrian area (Itineris55, CC BY-SA 4.0); Historic houses in the old town (Andrei kokelburg, CC BY-SA 3.0 ro); Council Square with the Council House (Dennis G. Jarvis, CC BY-SA 2.0); The Black Church (Mark Ahsmann, CC BY-SA 4.0); Poiana Brașov in winter (Kdanv, CC BY 3.0 ro); Poiana Brașov in summer (Andrei Dan Suciu, CC BY 3.0); Meadow near Poiana Brașov (Whitepixels, CC0); St Nicholas Church in Șchei (sailko, CC BY-SA 3.0); Brașov-Ghimbav Airport apron (Whitepixels, CC0); Apollonia Culture Bank (Itineris55, CC BY-SA 4.0); The White Tower (Neighbor's goat, CC BY-SA 4.0).

BENEFICIARY

Brașov Destination Management Organisation Association (OMD Brașov)
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PROJECT TEAM

BrandBerry srl (lead partner) · Horwath HTL România · GMP CommUnity