The strategy in brief

Tourism Development and Marketing Strategy of the Brașov Destination 2027–2034 · Volume I, opening pages · OMD Brașov · BrandBerry srl / Horwath HTL România / GMP CommUnity

These pages state what the strategy decides: the direction, the objectives, the policies and the first year. The rest of Volume I shows why and how. A reader with five minutes reads these pages; a reader with an hour also reads the key messages and the policy sheets; a reader evaluating the strategy reads the full report and the volumes.

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, never as a superlative; recognition is verified through the indicators of the vision (sections 2.1 and 4.5) [I].

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 (section 2.4) [I].

Mission. OMD Brașov, together with Brașov 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 (section 2.2) [I].

Positioning and promise. “Brașov is 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. The brand promise, “Brașov, your friend in Transylvania”, is also a promise of behaviour, by residents and authorities, and takes shape through the network “Your friends in Transylvania”: the guides, instructors and service providers curated and continuously trained by OMD (sections 2.3 and 3.14; S6) [I].

Values. The values of the destination are those of the greeting map, the exercise that moved from the values of the people of Brașov to the gesture that expresses them: welcome (hospitality, the cosmopolitan city open to other cultures), recognition (pride without arrogance, solidarity), trust (safety, inclusion) and reciprocity (respect, friendship); the brand personality is that of the Transylvanian greeting “Servus”, hospitality in its most elegant form, an “I am here so that you feel at ease” said to the guest, with no connection, in today’s usage, to the servitude meaning of the Latin word it comes from. The greeting map and its reading are in section 3.14 and in the brand brief [I].

The chosen scenario and its conditions. Of three scenarios, the strategy chooses growth in value: direct value added from tourism of about 787 million lei in 2034 (2025 prices), compared with 535 in 2025; in official statistics, at least 900,000 registered arrivals, a stay of at least 2.0 nights (2.2 as the threshold of ambition) and a bed-place occupancy rate of at least 37%, with peak-month pressure of only +5% (section 1.9) [E]. Growth succeeds only if two conditions hold, measured as benchmark KPIs: residents' acceptance of tourism and visitor satisfaction [I].

The focus. Two thirds of the marketing actions and of the promotion budget are directed at attracting foreign tourists from the markets to which Brașov has direct access, by air, by night train and by road, so that the target of a 2.0-night average stay, with 2.2 nights as the threshold of ambition, has a real chance of success: foreign markets bring longer stays and higher spending per night, while the Romanian market, over 80% of arrivals, stagnated in 2025 (sections 1.8 and 3.14); the general rule is that development precedes promotion [I].

How the strategy is built

The strategy is built as a cascade: the destination's 12 key challenges lead to 5 strategic objectives, 21 development objectives, 7 key policies and 6 horizontal policies, and 392 measures, 119 of which are key measures. Each level answers the level above it: any measure can be traced upwards to the objective it serves, and any objective can be traced downwards to the measures that deliver it.

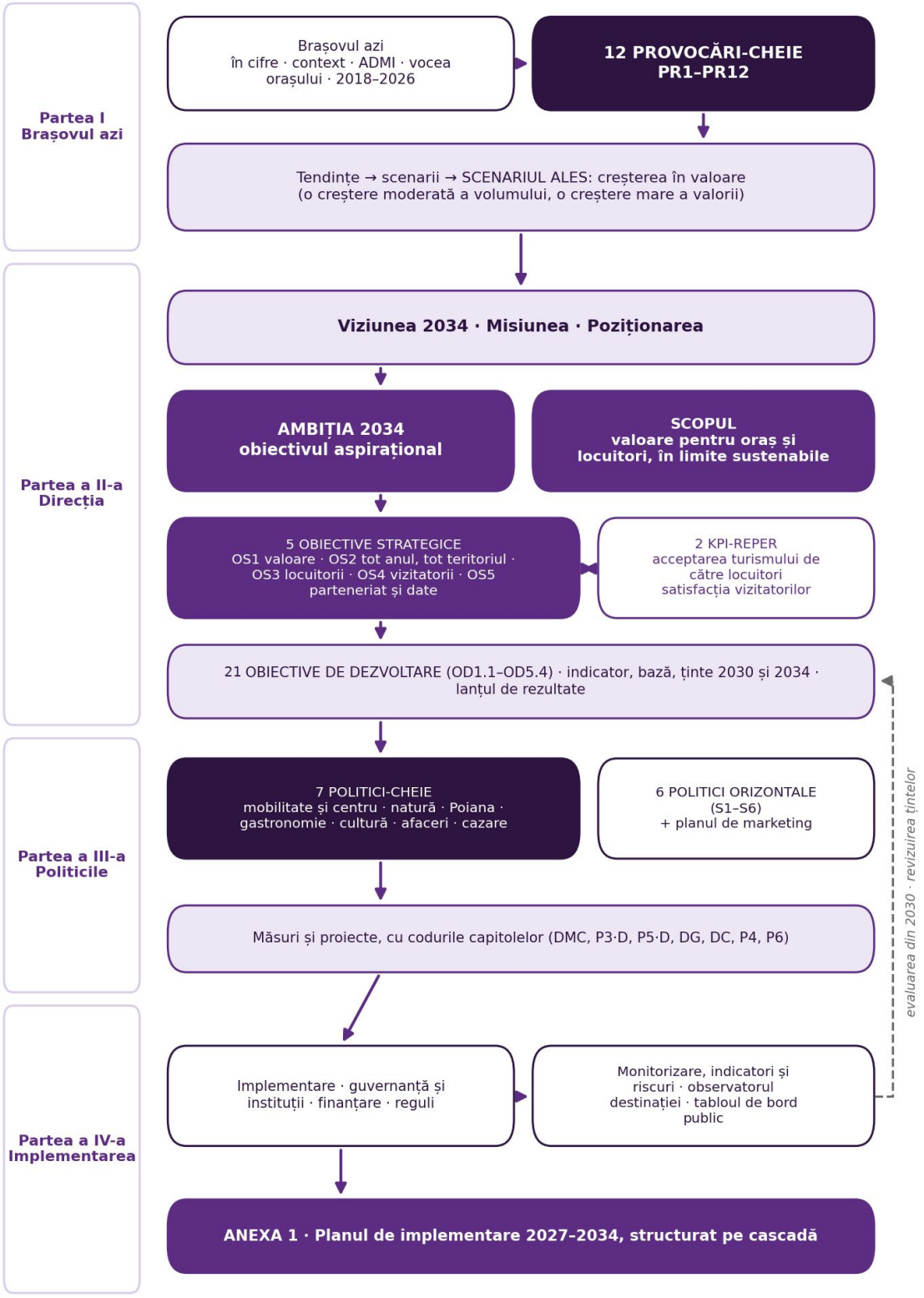

Figure 1. The logic of the strategy

Level	Question	Number	Code	Where to read
Key challenges	Why must we act?	12	PR1–PR12	1.7
Vision, ambition and purpose	What should Brașov be in 2034?	-	-	2.1–2.4
Strategic objectives	What do we want to change by 2034?	5	OS1–OS5	2.5
Development objectives	Which measurable results do we pursue?	21	OD1.1–OD5.4	2.6
Policies	Along which paths do we work?	7 + 6	Policy 1–7; S1–S6	Part III
Measures	What do we do, who, when and with what money?	392	chapter codes; S5-a, S3-a–S3-c	Part III; Annex 1

How it was built. The strategy starts from the Stage I consultation (22 interviews with 24 subjects, 12 group consultations and a round table with the architects, 148 themes), from the national reference survey of Romanian travellers, from the consolidated base of online reviews, from the integrated ADMI diagnosis, from official statistics and from the financial modelling of the scenarios; the brand direction comes from the analysis of the interviews and workshops and from the debriefs led by the project manager, as a sociologist and researcher, together with the project team's design expert: the brand brief, the greeting map and the personality proposal. Decisions belong to the project team, with execution supported by artificial-intelligence tools under permanent human control (methodology, at the end of Volume I). Every statement carries a marker: [C] confirmed data, [E] team estimates, [I] interpretations and proposals, [D] statements from the consultation.

The five strategic objectives

Objective	Target for 2034
OS1. More value from each visitor	direct value added of 787 million lei (2025 prices), from 535 in 2025; a stay of at least 2.0 nights (2.2 as the threshold of ambition); real spending per night +14%; RevPAR up by at least 25% in real terms; arrivals in licensed accommodation rising every year
OS2. A destination used all year and across its whole territory	bed-place occupancy of at least 37%; spring, at least 23% of overnight stays; in Poiana, winter's share of the resort's overnight stays

Objective	Target for 2034
	falls by a fifth from 2027, through the growth of the other seasons; Brașov in the top 20 Halloween destinations, in at least two international rankings
OS3. Tourism accepted and supported by residents	the acceptance index does not fall below its 2027 level
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 controlled impact on nature	the OMD mandate agreement; 12 key series of the observatory; the revised Tâmpa plan; operators report water and energy use and the share of local products

The thirteen policies, in brief

Policy	What it does
1. Mobility and the historic centre	a centre walked on foot, with parking at the edge; the alternative (transfer parking, the shuttle, public transport) precedes any restriction; the airport–city link, the first urgency, by summer 2027
2. Nature in four seasons and active tourism	the nature around the city as a product for every season, accessible by degrees; residents first; Tâmpa with a revised plan, the single trail map, bear prevention, mountain safety; the programme “Brașov, mountain-bike destination”
3. Poiana Brașov, premium resort	a premium standard in all services, “zone zero” as the resort’s centre, the resort regulation and the zonal urban plan; the public domain developed through the municipality’s investment programmes; operators build the resort experience together
4. Gastronomy	development precedes promotion: documented and protected culinary landmarks, Țara Bârsei products on menus and in the market, hospitality training, contemporary cuisine, compliant terraces, contracted breakfast for apartments, the quality label with public criteria
5. Culture and the living city	the Juni in the Register of intangible heritage, heritage read in layers, with St Bartholomew’s open and on the trail, the

Policy	What it does
	historic centre with a unified visual regime, as a protected architectural ensemble, with the Street-level Commercial Communication Code, and a lived-in place, with a housing programme, museums with a joint ticket, suitable municipal spaces used for cultural events and activities, the city alive in the evening, neighbourhood centres rebuilt, starting with Bartolomeu; Brașov Dark Fantasy Fest (proposed name) and the top-20 Halloween target
6. Business tourism and the exhibition centre	new demand on weekdays and off season: the congress and exhibition centre developed in stages (stage 1 of 20,000 sqm, expandable to 50,000 sqm, after the 2027 feasibility study; development up to 100,000 sqm is the local authority's decision) and the OMD convention bureau
7. Accommodation and tourist apartments	the same rules and the same tax for all forms of accommodation, the registration number in every listing, the special tourism promotion tax collected through platforms, incentives rather than bans
S1. Extending the stay	products sold by duration, joint packages, the guest card, regional circuits without a car, the city-and-resort stay
S2. The destination calendar	a single calendar, kept by OMD and published a year ahead, with events zoned by scale and anchor events off season
S3. OMD as the binding agent	the OMD mandate for destination functions, the resources of the special tourism promotion tax, under its statute, new partners, coordination groups, exchange of experience with European DMOs, Ljubljana first, continuous consultation during implementation
S4. Integrated information, digital and data	the destination QR code, the integrated agenda, the single trail map, the rebuilt Tourist Information Centre; the destination observatory, with 12 key series and a public dashboard
S5. Identity without kitsch, and brand	the visual order of the centre and the resort, with the Street-level Commercial

Policy	What it does
	Communication Code, the core story, the verification of historical claims, identity souvenirs; the brand promise, settled
S6. People and skills	the “Your friends in Transylvania” network, education as part of OMD, the culture of recommendation, joint staff training

The marketing plan (section 3.14) follows from the policies: priority audiences, products by season, foreign markets with direct flights, curated communication.

The first year. 2027 is the year of foundations: the OMD mandate approved by the General Assembly, the DMO’s planning of the use of the special tourism promotion tax, under its statute, the parking rules, the resort regulation, the missing baselines measured by the observatory. Then, in 2028, the zonal urban plan of Poiana, the single trail map, the public dashboard and the bid for the title of European Capital of Culture; in 2029, the revised Tâmpa plan; in 2030, the mid-term evaluation; in 2034, the final evaluation (section 4.1) [I].

The warnings. The strategy states what would make it fail (section 4.7): ambition can exceed the administrative and economic capacity to deliver, so the annual plan takes the key measures first and no measure is left without a named owner; development is measured in value, not in the number of tourists; the city belongs to its residents, and the pressure of tourism is measured every year, by neighbourhood, with alert thresholds; promotion follows development, and gastronomy is first a sector of the city and only then a marketing argument; benefits are spread to the neighbourhoods, to Poiana and to Țara Bârsei; carrying capacity has written limits; those who apply the strategy are consulted continuously; and continuity across terms of office is secured by acts, not intentions. Brașov must become a better city to live in, not only a more attractive one to visit [I].