Brașov, your friend in Transylvania

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



Sunrise on Postăvaru · project archive

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BENEFICIARY Brașov Destination Management Organisation Association (OMD Brașov)

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

BRAȘOV, YOUR FRIEND IN TRANSYLVANIA

A city that wants to be, not just to have

Brașov has a mountain, a citadel, a resort and an airport. This brochure is not about what Brașov has, but about what it is and what it wants to become by 2034: a place where you feel truly welcome, where the city and the mountain are lived in the same hour, and which you leave with a friend.

The strategy was born from listening. In 2026, the people of Brașov, those who work in tourism, the city's institutions and associations said what they love about Brașov, what should improve and what should stay as it is. Their voices were set alongside what visitors say, the figures and what other European destinations have learned. From all of this a direction took shape, which OMD Brașov, our destination management organisation, carries forward with the City Hall and the Local Council, other public authorities and those who host guests in the city, in Poiana and in Țara Bârsei.

This brochure reads on its own: what we want to become, with which objectives, where we start from, the thirteen policies, who is responsible and with what money, and how we will know whether we have succeeded. Codes, indicator tables and methodological notes are in the three volumes on the strategy's website. Chapter II.3, on the Poiana Brașov resort, serves as the resort's own strategy, for its re-certification.

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Michael Weiss Street, towards Republicii Street, and Tâmpa in autumn · photo: Kevin and Amanda, with the authors' permission

THE DIRECTION · 1 · THE VISION AND THE AMBITION

Capital of the Carpathians

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 every season, stays for several days and leaves with a new friend, Brașov.

Brașov is the city where the Carpathians begin. Twenty minutes from the Council Square you are in the forest, and in less than an hour, without a car, in three mountain massifs. "Takes on the role" means that the position is built, not declared: through the gateways to the Carpathians reached by train and bus, through the catalogue of excursions at reception, through a mountain rescue service that answers promptly, through sporting events of European standing. "Capital of the Carpathians" is always said with its evidence, never as a superlative.

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 for several days, in any season.

The vision and the ambition are read together: one says what Brașov becomes, the other for whom and to what benefit. The signs of the ambition are clear and verifiable: the value left in the city, the nights a visitor spends, a city used all year round, residents who support tourism because they see its benefits, and visitors who recommend it without hesitation.



A meadow near Poiana Brașov, with the Bucegi in the distance · photo: Whitepixels, CC0

2.0 nights

the average stay targeted for 2034, up from 1.84 nights in 2025; 2.2 nights as the threshold of the ambition

4 gateways

to the Carpathians reachable from Brașov without a car, from 2031

787 m lei

value added from tourism in 2034, up from 535 in 2025

In Brașov you have a friend

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 begins in the city and the Transylvania around it.

The promise puts the emphasis on hospitality, on the host, not on the scenery: Brașov does not sell a stage, it offers an encounter. From the 14th century the city was a free town and the trading centre of Transylvania, and a trading centre teaches people trust, a kept word and the other's language. This is where today's friend and the city of many cultures come from: the Romanians of Șchei, the Saxons of Kronstadt, the Hungarians of Brassó, the Greeks, the Jews, the new communities, three confessions a few hundred metres from one another.

The promise is addressed to everyone: there are other cities in Transylvania, and Brașov is their friend too, and all the more the friend of those who do not yet know what Transylvania is. For the English-speaking reader, the entry into Transylvania in Bram Stoker's novel comes through a letter that opens with "My Friend" and wishes "Welcome to the Carpathians"; our promise takes up that welcome, with a real friend, the local. Dracula remains a character treated creatively, under his own name, in a festival, in tours and in products; the name of the destination is Brașov.

The promise is also one of behaviour. We, the people of Brașov, return a greeting and greet first; we recommend the whole destination, not only our own part of it; we respect the rules of the mountain and show them to our guests, so that they respect them too. The authorities serve residents and visitors with the same attitude. The friend also has a face: the guides, instructors and providers curated by OMD Brașov are "your friends in Transylvania".



The historic centre at sunset, with the Citadel on the hill · photo: Kevin and Amanda, with the authors' permission

42.3%
of Romanian travellers name hospitality as the first trait of the people of Brașov

3
confessions a few hundred metres from one another, in the historic centre

Our values, in the gesture of greeting



The greeting map, created by Alexandru Icodin, PhD candidate, visual-identity expert, after the sketch in his notebook: at the centre, the gesture; in the first ring, the values; at the edge, the lines and behaviours, that is, the tone of voice

Welcome

the hospitality of a city open to other cultures

Recognition

pride without arrogance; on the mountain, the greeting is a trail marker

Trust

safety and inclusion: from stranger to acquaintance

Reciprocity

the respect that becomes friendship: I offer, I support, I expect

The destination's values are those of the greeting map, the exercise through which we moved from the values of the people of Brașov to the gesture that expresses them: welcome, the hospitality of a city open to other cultures; recognition, pride without arrogance; trust, safety and inclusion; reciprocity, the respect that becomes friendship. They are all expressed in the greeting, the most natural gesture of the place: an open attitude, at the service of the other. From the moment of the greeting, the person who comes to our street or our trail for the first time is no longer a stranger, but someone we know.

On the mountain, the greeting is a trail marker: everyone greets everyone. In the city it becomes "Ask me!", the offer to help before being asked. The greeting map is also the destination's tone of voice: the lines and behaviours at its edge say how Brașov speaks, to its guests and to itself.



The old marker of a ski run in the forests of Brașov · project archive

Five strategic objectives, with the targets for 2034

How the strategy is built

Twelve lines of work, drawn from official data, the national survey, 47,513 online reviews, the integrated diagnosis and the consultation, are answered in cascade: five strategic objectives; 21 development objectives, each with an indicator, a baseline and targets for 2030 and 2034; seven key policies and six horizontal policies, each with the same policy sheet; 392 measures, 119 of them key measures, with an owner, a horizon and a priority. Each measure serves an objective, and each objective has the measures that deliver it. Each policy serves several objectives: mobility serves value, residents and visitors alike; gastronomy, value and the year-round use of the city; the calendar, all five.

The role of the City Hall and the Local Council

The strategy belongs to the destination, and the local authority makes it possible. The strategy proposes that the Local Council adopt it by decision and take it into account in the city's development strategy and its planning documents, so that public investment pursues the same five objectives. OMD Brașov is funded, under the association's statute, through the monthly transfer of 90% of the amounts actually collected from the special tourism promotion tax; multiannual planning seeks the predictable use of these resources for the strategy, with no additional budget allocation through its mere adoption. The regulations that fall to the local authority (terraces, advertising, short-term rentals, coach access, events in public space) remain within the powers of the Local Council and the City Hall; the strategy offers them a common direction. The strategy proposes that the annual destination report come before the Local Council every year, for a public debate on progress towards the targets, and that at the 2030 and 2034 evaluations the Council decide the corrections. OMD 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.

SO1 · More value from every visitor

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

SO2 · A destination used all year round and across its whole territory

the bed-place occupancy rate rises from 33.2% to at least 37%; spring (March–May) reaches at least 23% of the year's overnight stays, up from 20.2% today; in Poiana, winter's share of the resort's overnight stays falls by a fifth from 2027, through the growth of the other seasons

SO3 · Tourism accepted and supported by residents

the acceptance index does not fall below its 2027 level; the historic centre stays inhabited; the contribution of tourism to the local economy is measured

SO4 · Visitors satisfied with a quality experience

firm recommendation of at least 80%; a review score of at least 4.50 (out of 5)

SO5 · A destination managed in partnership, on the basis of data, with a controlled impact on nature

the OMD mandate approved by the General Assembly; twelve new data series on the destination, measured every year; the revision of the Tâmpa management plan, supported; operators report water and energy consumption and local products



The Council Square · photo: Dennis G. Jarvis, CC BY-SA 2.0

12 → 5 → 21 → 13 → 392

lines of work, strategic objectives, development objectives, policies, measures; 119 key measures

2 headline indicators

residents' acceptance of tourism and visitor satisfaction, reported together

2030 · 2034

the independent mid-term and final evaluations

For whom and with whom

Where we direct our efforts

Two thirds of the marketing actions and of the promotion budget are directed at foreign tourists from the markets with which Brașov now has a direct link: by air, through Brașov-Ghimbav airport, by night train from Budapest and Vienna, and by car. They stay longer and spend more per night, while the Romanian market, over 80% of arrivals and the base of the destination, stagnated in 2025: the new growth comes from Europe.

The promise is one, "Brașov, your friend in Transylvania", but the content we put forward differs: gastronomy for the United Kingdom, Germany and Austria; the cool, active summer, with hiking, mountain biking and welcoming locals, for Spain, Italy, Portugal and France; the mountain in summer and skiing in winter, by night train, for Hungary, Poland and the Czech Republic; the long family holiday for Israel.

Who holds the strategy

OMD Brașov, together with the City Hall and the Local Council, with the other public authorities with powers in the destination and with the tourism operators, manages Brașov as a single destination: it coordinates the offer, the calendar and the 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. Rules and budgets remain with the City Hall, the Local Council and the other authorities; OMD is the place where their decisions meet the operators and the data.



Line A1, Brașov Airport – Brașov railway station · photo: transilvania365.ro

2/3

of the marketing actions and of the promotion budget, towards foreign tourists from the markets with direct access

337,353

passengers at Brașov-Ghimbav airport in 2025, 48% more than in 2024

> 80%

of registered arrivals come from the domestic market, which stagnated in 2025

A loved city, with room to grow

More visitors; the next step, more nights

In 2025, the city's registered hotels, guesthouses and apartments received 715,064 guests, with 1,318,726 overnight stays; the county ranked third in the country. Official statistics, however, see only part of the city. Counting the accommodation that does not appear in the official records, Brașov receives about 1.1 million tourists a year, and alongside them about 1.6 million same-day visitors: almost 2.7 million visits, roughly ten times the city's population. Official statistics see about a quarter of them.

The stay has shortened from 2.62 nights in 2001 to 1.84 in 2025. The bed-place occupancy rate, 33.2%, is at the level of a quarter of a century ago, because bed capacity grew at the same pace as overnight stays, while arrivals multiplied 3.93 times. Brașov has learned to receive many people; the next step is to keep them longer.

A strong image, to be widened

Of the destinations tested in the national survey, Brașov has the strongest image: 86.9% of Romanian travellers find it attractive, 95.1% of visitors describe their experience as pleasant, 76.7% would definitely recommend it. But when asked what comes to mind, people name almost only places: the mountain, the Black Church, Poiana Brașov. Gastronomy and events are almost absent, the Juni are mentioned by one in a thousand, and Kronstadt, the Saxon name of the city, by no one. The city is loved for what it has and unknown for what it is.

Visitors, asked what they liked, talk about how they felt, not about what they saw. The strategy builds on that feeling: Brașov has to show not only what it has, but what it is.



The historic centre seen from Tâmpa · photo: Andrei Dan Suciu, CC BY 3.0

2.7 m

visits a year: about 1.1 million tourists and 1.6 million same-day visitors

1.84

nights, the average stay in 2025, down from 2.62 nights in 2001

29.1%

of Romanians' spontaneous associations with Brașov are the mountain; 19.1% the Black Church; 14.0% Poiana; gastronomy, 4.9%

Twelve lines of work, starting from what works

Most of what is in this strategy was told to us by the people of Brașov, the hoteliers, the guides, the museum curators, those who manage the forests and the ski slopes. Nature is the asset everyone names. Alongside it they named what the city has to put in order, and the strategy gathered it all into twelve lines of work: the value of demand; the use of capacity off season and on weekdays; mobility and access to the centre and to Poiana; the historic centre, with its traffic, visual order and housing; Poiana, between season and off season, with its public space; equal rules for accommodation; infrastructure for business tourism; heritage, events and the city alive at night; gastronomy; nature, with Tâmpa, wildlife and safety; governance and data; people and skills. Seven of the nine themes named today by at least half of those interviewed were already formulated in 2018: they are known and expected, and the strategy puts them into a plan, with an owner and a deadline. That is why the emphasis falls on implementation and on who is responsible.

Demand

Visitors stay briefly and spend little, and the capacity available in spring, in autumn and on weekdays, when no month exceeds 45% occupancy, is the destination's reserve for growth. Gastronomy is an opportunity not yet used: only one traveller in twenty associates Brașov with food, although more than a third of Romanians practise food tourism.

Places

The historic centre needs a balance between access, terraces and housing. Poiana Brașov has good private services and awaits a resort centre and a public space to match. Nature calls for joint management of the bears, with interventions up from 770 to 1,160 in a single year, and has visibility to gain: hiking appears in only 1.4% of reviews. Heritage has stories to tell the 45.3% of visitors who enter no museum.

Functioning

Access and mobility, with the weakest index in the diagnosis, are the first place where ground can be gained. Accommodation needs equal rules, with 2,295 apartment listings against about 1,100 classification certificates; business tourism needs infrastructure; governance needs coordination and fuller data, today covering a quarter of reality; people need training and stability: staff hard to find and keep, few guides, the recommendation missing exactly where the visitor expects it.



One of the consultation workshops, 2026 · project archive

7 of 9

themes named today were already formulated in 2018, in the research on Brașov's identity; the strategy puts them into a plan, with an owner and a deadline

2.54 of 5

the destination's overall index in the integrated diagnosis; access and mobility, 1.95

45.3%

of Brașov's visitors entered no museum

What is changing around us; three scenarios, one choice

What is changing around us

The world in which Brașov writes its strategy is moving in its favour, provided it reads the signs well. The Romanian market stagnated in 2025, while Brașov-Ghimbav airport passed 337,000 passengers, almost half as many again as the year before, and opened the city to Germany, the United Kingdom, Italy and Spain. The new growth comes from Europe.

Europeans are looking for different holidays: longer stays, lesser-known destinations and, ever more insistently, cooler summers. 81% of Europeans say climate change affects their travel decisions, 15% actively seek milder climates, and interest in the Mediterranean is falling. A city at 600 metres, with a resort at 1,000 and a summit at 1,800, has an argument here it does not need to invent. Food has become a reason for choosing a destination: for almost four in five travellers, cuisine matters a lot or a great deal. Ski resorts that invested in mountain biking have reversed their seasons; winters with less snow at Postăvaru's altitude are a measured trend, not a hypothesis.

Three scenarios, one choice

Brașov has grown in volume: arrivals have almost quadrupled since 2001, but each visitor stays less and less. We analysed three scenarios to 2034, measured with the same unit: the value that tourism leaves in the city. The inertial scenario, in which nothing changes, would bring 612 million lei; the volume-growth scenario, with more tourists on the same days and in the same places, 672 million, with 36% more pressure in the peak months. The value-growth scenario brings 787 million, at today's prices, with only 5% more pressure, and remains the best even if only half achieved. That is the scenario the strategy takes: more nights and more spending per visitor, with balanced growth in arrivals.

The strategy does not cap the number of tourists; it steers growth towards the periods, places and businesses where the destination can turn it into value: towards spring and autumn, towards weekdays, towards the neighbourhoods, Poiana and Țara Bârsei, towards the restaurants and accommodation that respect the city's rules. Growth is a success only if the people of Brașov keep supporting tourism and visitors keep recommending it.



Mountain biking on a built trail in the forest · photo made available to the project

15%

of Europeans actively seek milder climates in summer; 81% say climate change affects their travel

4 in 5

travellers consider cuisine important or very important in choosing a destination

612 · 672 · 787

million lei of value added in 2034 in the three scenarios: inertial, volume, value; +5% peak-month pressure in the chosen scenario, against +36%

POLICY 1 · MOBILITY AND THE HISTORIC CENTRE

A centre you walk through

How it will be in 2034

The historic centre is walked. Visitors' cars stay at its edge, in car parks integrated into the city, and the residents of the centre and of Șchei get home as they always have. The squares, the parks, the path below Tâmpa, the After the Walls promenade and the road to the Citadel form a continuous network for pedestrians, with benches, shade, toilets and information. Coaches stay at the transfer hubs, and groups and seniors reach the centre and Șchei on dedicated lines. The visitor arrives by train or by plane, or leaves the car at the entrance to the city, travels with the guest card and, once it runs, with the metropolitan train; in the morning they set off for the region and in the evening return to their accommodation.

Where we start from

Today the centre is the most sought-after place in the city, and traffic comes to a stop in it: in a single long weekend in December, 26,602 vehicles entered Mureșenilor Street. The core of the historic centre and Șchei still have about 5,000 residents. At the airport, the foreign guest today finds a bus line with fourteen stops; the express link is the first step.

What we do

The rule of the policy is the order of things: the alternative precedes any restriction. First the link between the airport and the city: an express line, a regulated taxi rank, information as you step off the plane, by summer 2027. Then the parking rules, which require no investment: no free weekend parking in the historic centre, a tariff that falls with distance, a resident permit valid seven days a week, the Bartolomeu park-and-ride with 697 spaces, an integrated ticket and a shuttle. Only once the alternative works does controlled weekend access follow. Five pedestrian corridors link the squares, parks and promenades; the 30 km/h limit, extended to the whole historic centre and to Șchei, is applied in practice, with enforcement, and residential streets become shared streets. The guest card, from three nights up, includes urban transport; the "three nights without a car" product puts into it a day in the centre, a day on the mountain and a day in the region. Signage is in Romanian and English throughout the city.

- a quieter centre at weekends, without traffic searching for a parking space, with an enforced speed limit;
- the resident permit valid seven days a week and residential parking kept for residents, through the city's parking policy;
- a historic-centre officer and a census of its residents, in 2027, 2030 and 2033.

DONE RIGHT *In its pedestrian zone Ljubljana offers small, free electric vehicles, the Kavalir, for the elderly and for anyone who needs them: pedestrianisation excluded no one from the centre. Brașov takes up good practice and adapts it to the local context.*



The White Tower · photo: Neighbor's goat, CC BY-SA 4.0

26,602

vehicles entered Mureșenilor Street over the long weekend of 1–3 December 2023

697

spaces in the Bartolomeu park-and-ride, with an integrated ticket and a shuttle to the centre

3 nights

from which the visitor receives the guest card, with urban transport included

POLICY 2 · NATURE IN FOUR SEASONS AND ACTIVE TOURISM

Nature begins in the historic centre

How it will be in 2034

Brașov is Romania's mountain city, and nature begins in the historic centre and is explored on foot, by bike or by cable car, each at their own pace, in every season. The people of Brașov have nature close to home: the parks are used, families have safe cycle routes to the forest parks, and Tâmpa remains a reserve, with rebuilt paths and no heavy interventions. The forest parks have a network of graded and marked trails, with family tracks and mountain-bike trails separate from walkers' paths.

Mountain biking, our summer product

Nature is not sold as a panorama but as a state of being: hiking appears today in 1.4% of reviews. The "Brașov, mountain-bike destination" programme starts from what we have, the terrain, the airport, the gondola, the community and the descent from the summit to the historic centre, and from what we lack: beginner trails for families, a trail-network manager and safety. The family route from Brașov and Poiana to Râșnov, Zărnești and Bran, with the return by train, brings the surrounding Transylvania into the same day as the city. Brașov City Hall invests in the maintenance of the existing trails and is considering their extension.

What we do

We support the revision of the Tâmpa management plan, which lies with the administrator of the protected area, with public debate, and the rebuilding of the paths, with steps, handrails and drainage. We produce a single map of the trails around the city, on four levels, with uniform marking and information at every entrance. We complete the family tracks between Răcădău and Noua and extend them towards Cristian, Râșnov and Poiana: from about 8 km to at least 25 km by 2034. We create viewpoints, with a bench, a parapet and a discreet panel, and, in a forest park outside the protected areas, a treetop walkway, with private investment or attracted funding, on land that stays public. We open two green mountain-bike trails and a predictable schedule for the lifts, from May to November. Together with the competent authorities and the operators, we reduce the food of human origin in the bears' way: waste, feeding, clean trails. We take the visitor without a car to the gateways of the Carpathians: by train to Zărnești, with the bike on the train, by weekend buses.

- viewpoints laid out on Tâmpa, in Poiana and in the forest parks;
- safe cycle routes from the neighbourhoods to the forest parks and an accessible path at the foot of Tâmpa;
- fewer bear incidents at the edge of the forest; nature education offered to every school, by 2031.

DONE RIGHT *The treetop walkway in the Bavarian Forest National Park received over 3.35 million visitors in fifteen years; the one in the Hainich forest is accessible by lift. Brașov keeps the model only in a forest park outside the protected areas, with no felling and with land that stays public.*



Postăvaru in summer, through a viewpoint frame · photo made available to the project

1,160

bear interventions in the county in 2025, over 60% in the city and in Poiana

25 km

of family tracks in the forest parks by 2034, up from about 8 km today

1.4% → 3%

the share of reviews mentioning hiking, today and in 2034

POLICY 3 · POIANA BRAȘOV, A PREMIUM RESORT

A resort worthy of its mountain

How it will be in 2034

Poiana Brașov is Romania's premium mountain resort of reference: compact, for four seasons, with a premium standard in all its services, private and public. The resort has a centre, the zone zero: the place where the tourist arrives first, where quality retail, gastronomy and the calendar are concentrated. The tourist experiences Poiana as a single resort: the same information, the resort card, one place for activities, the shuttle and a programme between 5 pm and 10 pm. The resort's calendar has an annual embassies event, in which Poiana celebrates countries and their cuisines, and monthly events in season. In summer, the lifts carry cyclists from May to November. The people of Brașov go up to Poiana by bus. The urban plan limits collective housing and aparthotels, and the forest and Postăvaru remain the resort's main value.

Where we start from

"We have no clear centre", said those who work in the resort: Poiana has good hotels, while the public space and the retail at the bottom of the cable car, the first image on arrival, have ground to make up. Winter brings almost half of the revenue, off-season occupancy is 26.8%, against 45.2% in the city, and the resort's restaurants score 3.77, with a third of reviews negative. On peak days the road jams, although the Poiana Mică park-and-ride, with 434 spaces, has capacity available.

What we do

First the rules, then the centre. The resort regulation, adopted in 2027, sets the common standard of services: every establishment receives a compliance score and three years to reach it, and tying compliance to the building tax and the operating licence is a proposal for the authorities to assess, within the limits allowed by the Fiscal Code. The proposed zonal urban plan, in 2028, limits collective housing and aparthotels. The zone zero is built between 2028 and 2031, with a retail and events regulation adopted before opening, so that the new centre has quality retail from the start. Car access stops beyond Poiana Mică when the car parks are full, and a high-frequency line links the city to the resort. The mountain-bike park gets the full range, from green to black, and a single manager; the viewpoints get benches, parapets and a discreet frame. The resort card, the joint activities desk, the shuttle and the evening programme belong to the operators, together.

- Poiana as our second leisure space, reachable by bus, without the peak-day jams;
- running and walking trails, a lit promenade, a sledging slope for children;
- a resort with building limited by the urban plan, with the forest and Postăvaru protected.

DONE RIGHT *Maribor carries cyclists straight from the city, by gondola, into the bike park on Pohorje: almost 20,000 cyclists in the 2024 season, twice as many as the year before, with new trails for families and beginners.*



Poiana Brașov in winter · photo: Kdanv, CC BY 3.0 ro

26.8%
off-season occupancy of short-term rentals in Poiana, against 45.2% in the city

II.3
the strategy's chapter dedicated to Poiana Brașov, serving as the resort's own strategy, for its re-certification; the regulation in 2027, the zonal urban plan in 2028

2 + 1
events a month in season and one off season, from 2027, with an annual embassies event in which Poiana celebrates countries and their cuisines

POLICY 4 · GASTRONOMY

In Brașov you eat well and local

How it will be in 2034

Brașov is the Romanian destination known for the quality of its food and for its local dishes. The visitor knows, before arriving, what is eaten here and finds the same signature dishes on the menus of dozens of restaurants, with the base recipe respected and freedom of interpretation. The products of Țara Bârsei have a name, a brand and a place of sale. The historic centre has compliant terraces, an honest lunch offer and areas where the evening continues after 10 pm; the neighbourhoods have small squares alive in the evening. The guest of an apartment has breakfast in a nearby café, and the calendar has its own gastronomy festival, with an international echo.

Where we start from

Brașov's gastronomy exists and is waiting to be seen. More than a third of Romanian travellers regularly practise food tourism, but only one in twenty associates Brașov with food. The heritage is documented, about 135 dishes, products and drinks, but it has not yet become a product: no reference recipe, no protection. Tourists in accommodation eat at least 1.3 million main meals a year, and tourist apartments sell over 360,000 room-nights a year, as many breakfasts that guests provide for themselves today and could take in a café nearby.

What we do

We write the reference book of Brașov recipes: 10–12 signature dishes with a common base recipe, variants and verified historical sources, under the aegis of OMD, with the guild, the museums and the university; we protect the signature dishes with a collective trademark and with traditional-product certifications, up to a geographical indication for burduf cheese in fir bark. The producers of Țara Bârsei receive a platform and a territorial brand, and restaurants with verified local products, incentives. The Terrace Guide, adopted by the city, becomes the common reference of the centre and is applied. We define the evening areas, with opening after 10 pm, together with residents. Contracted breakfast links apartments to the cafés of their area: a voluntary pilot in 2027, between managers and cafés, brokered by OMD, then the rule for those who join. We prepare the Brașov Festival of Culinary Culture, with the cheese festival at its core and Bergamo as partner, first edition in 2029. The destination quality label, with public criteria and an independent annual assessment, is the filter through which OMD chooses what it promotes; it excludes no one from the city. Development precedes promotion: gastronomy becomes main content on the markets after the reference book is published, with 30 labelled venues and 20 with the signature dishes on the menu; we train people for hospitality and give the contemporary kitchen visibility.

- neighbourhood squares alive in the evening and neighbourhood festivals with food made by residents;
- an honest lunch in the centre, terraces that leave the pavement free, a city market with the products of Țara Bârsei;
- more stable jobs and training for those who serve.

DONE RIGHT *The Slovenian label "Gostilna Slovenija" requires at least 80% local, regional or national dishes and at least three protected-designation products; the Brașov label can use the same verifiable criteria.*



Republicii Street, the pedestrian area · photo: Itineris55, CC BY-SA 4.0

37.5% · 4.9%

of Romanian travellers practise food tourism; only 4.9% of travellers associate Brașov with gastronomy

135

dishes, products and drinks documented; no protected reference recipe today

80 · 50 · 100

restaurants with the quality label, with the signature dishes on the menu, with verified local products, in 2034

POLICY 5 · CULTURE AND THE LIVING CITY

Heritage becomes story, the city comes alive at night

How it will be in 2034

The people of Brașov go out for culture, not only in the centre and not only at weekends. The Juni custom of Șchei is inscribed in the national register of intangible cultural heritage, the tercentenary of its first attestation, 26 March 2028, has been celebrated as a multi-year programme, and the UNESCO file has been submitted together with the Union of the Juni. The historic centre is read in layers, from the Gothic to Stalin City, with the towers and bastions open, the Citadel reopened and St Bartholomew's, the city's oldest church, on the trail; the centre has visual order, through the Street-level Commercial Communication Code, and remains lived in. The museums have a joint ticket and produce events. The destination has a single calendar, with three flagship events from summer to late autumn, and is in the top 20 Halloween destinations. The city is alive at night in defined areas, the neighbourhoods have cultural centres in the former heating plants and rebuilt neighbourhood centres, starting with Bartolomeu, and the industrial history is read in trails and exhibitions. The bid for the title of European Capital of Culture 2034, decided by the Local Council, was submitted in 2028, and the programme built for it stayed with the city.

Where we start from

Almost half of visitors enter no museum, and the Juni appear in one in a thousand spontaneous associations with the city. The city supports its cultural institutions, the theatres, the Opera, the Philharmonic, the "Apollonia Hirscher" Cultural Centre, and the strategy proposes a mechanism for communicating all events, whether of the cultural institutions or of independent culture, through a consolidated calendar, communicated coherently.

What we do

We prepare the Juni file and the tercentenary programme, with the decision on the ritual left to the Union of the Juni. We open the towers and bastions, with a custodian and a told history, and give the Citadel a function after its opening in 2027. We propose for the historic centre a unified visual regime, as a protected architectural ensemble, to be assessed legally by the City Hall, which regulates the image, not the function; the Street-level Commercial Communication Code gives it its drawings, the housing programme brings families back, and the centre's residents are counted in 2027, 2030 and 2033. We propose to the administration of St Bartholomew's a circuit and the pedestrian link to the Citadel, and give the neighbourhood centres a planning brief, starting with Bartolomeu. We introduce the joint museum ticket. We propose using suitable municipal spaces for cultural events and activities with tourism potential, in the forms set by the local authority; the places of living private heritage, the workshops, shops and family collections, receive the destination's mark. We write the narrative manual and train the city's guides and storytellers: legend marked as legend, fact as fact. The single calendar is kept by OMD, together with the City Hall and the cultural institutions, and has a "Green Events Brașov" programme. Contemporary urban culture gets its own places, outside the historic centre, and a street-art district, if the residents confirm it.

- cultural centres in the neighbourhoods and small events close to home, every weekend;
- evening areas set together with residents, with sound rules;
- a local-heritage class in schools and tours for the people of Brașov in their own city.

DONE RIGHT *The Einschenk instrument workshop, in the same family since 1896 and run by the fourth generation: living private heritage, recognised with the destination's mark; a place kept by people, not made for visitors.*



The Juni of Brașov, at the celebration · project archive

26 March 2028
the tercentenary of the first attestation of the Juni custom, the identity anchor of the calendar

45.3%
of visitors entered no museum; the Juni appear in 0.1% of spontaneous associations

2028
deadline for submitting the bid for the title of European Capital of Culture 2034, if the Local Council so decides

POLICIES 6 AND 7 · THE VISITOR ECONOMY

The city works Monday to Thursday too; equal rules for accommodation

Policy 6 · Business tourism and the exhibition centre

Trade fairs and congresses bring guests on weekdays and in the off-season, exactly when hotels have the most room; hoteliers describe a full weekend and a weak week. The city has no exhibition hall, and the Multipurpose Arena, ready in 2027, covers concerts, sport and congresses, not trade fairs. The strategy proposes a congress and exhibition centre developed in stages: a first stage of 20,000 sq m of halls and a congress centre, expandable to 50,000 sq m; development up to 100,000 sq m remains the local authority's decision, after studies; a site with public transport and no traffic through the historic centre. The critical assessment is stated openly: such a centre covers its operating costs only from 30–40 events a year and does not recover its investment from its own revenue; its value is the impact on the city's economy, seven to twenty times its revenue. The decision on the site remains with the City Hall and the Local Council, on the basis of a feasibility study. A convention bureau, to be set up within OMD, keeps a joint calendar, the fair ticket includes public transport, and the "Work from Brașov" programme brings digital nomads to a city where you can work for a month with the mountain at the window.

Policy 7 · Accommodation and tourist apartments

Tourist apartments are part of the destination, not a problem to be solved by bans. In August 2026 there were 2,295 listings active on the platforms, against about 1,100 classification certificates; in 2025 the segment sold over 360,000 room-nights, almost one and a half times the official figure. Those who pay the special tourism promotion tax put it simply: they cannot compete fairly with those who do not. The strategy sets no day caps and does not limit the number of licences; it applies the existing rules to everyone and links the guest to the local economy: every listing displays its registration number, the tax is collected through the platforms, managers have simple procedures, a local contact and an association of their own, guests have breakfast in the cafés of their area, and in Poiana the units follow the same regulation as the hotels. Guest parking follows the city's parking policy, not residents' spaces.

- weekday demand for the city's restaurants and shops; contracts for local suppliers;
- peace and respect in residential buildings; the special tourism promotion tax paid by all, used for the destination;
- fair competition for managers who follow the rules.



The "Apollonia Hirscher" Cultural Centre · photo: Itineris55, CC BY-SA 4.0

200,000

overnight stays a year in 2034 from the congress and exhibition centre, in the chosen scenario

30–40

events a year, the threshold from which the centre covers its operating costs

2,295 · 1,100

apartment listings active on the platforms against classification certificates, in 2026

SIX POLICIES THAT HOLD EVERYTHING TOGETHER

What holds the strategy together

S1 · Longer stays

The destination is sold by duration, not by sights: two-hour, one-day and weekend products; the guest card from three nights; the catalogue of nature excursions; city and resort as a single stay; integrated products at metropolitan and county level; the Brașov–Sibiu–Sighișoara triangle.

S2 · The destination calendar

One calendar, kept by OMD together with the City Hall and published a year ahead, with volume outside the historic centre; three signature events from summer to late autumn; the Juni tercentenary as the anchor.

S3 · OMD as the binding agent

Not a new institution but a mandate: OMD receives, in its General Assembly, the destination functions, with the resources of the special tourism promotion tax transferred monthly under its statute; the Local Council and the City Hall decide, OMD coordinates and measures.

S4 · Information and data

The same information from booking to departure, in three languages: the destination QR code in every accommodation, the single trail map, bilingual signage; twelve new data series and a public dashboard from 2028.

S5 · Identity without kitsch

The historic centre with a unified visual regime, as a protected architectural ensemble, with street trade and furniture regulated by the Commercial Communication Code; Poiana's zone zero with selected traders; the area's symbols in public space. What the destination refuses: bazaar Dracula, cardboard scenery, block hotels.

S6 · People

The brand promise takes a face through people: the curated network "Your friends in Transylvania", guides, instructors and providers trained on the greeting map, at least 200 by 2034; the welcome standard, "Ask me!".

Young people's Brașov

Young people come to Brașov often and know it little: fewer than half of those aged 18–29 who have not yet visited know where the Council Square is, and those who come say they do not know what to do after the first day. The strategy answers them in every policy, not with a separate one. Brașov takes on a role in environmental education: the city's children learn about the mountain, the forest and living alongside the bear, at school and in the forest parks, in the Noua arboretum, on the nature-interpretation paths of Tâmpa, on the treetop walk and in the interactive exhibition about trees and people, designed to travel from school to school; they discover the Juni tradition in the local-heritage lesson and learn to ski in the children's ski holiday. The city gains a place and an evening programme for the culture of the under-30s: the urban sports park, legal street art, the urban festival, the library open until evening, with the loud events kept outside the historic centre. Students become guides, volunteer hosts and volunteers of the destination, from the Juni tercentenary to the bid for 2034, and the university is invited to become a partner of OMD Brașov. The historic centre stays inhabited, with a programme for the young people and families who want to live there. And the young visitor gets what was missing: two-hour, one-day and weekend offers, the guest card with transport included, the catalogue of nature excursions, bike trails graded by difficulty, and a destination you can reach, and get around, without a car.



Tâmpa seen from the Council Square · photo: Jorge Franganillo, CC BY 2.0

Eight years, three stages, a first year of foundations

The first year and the three stages

2027 is the year of foundations: the OMD mandate approved by the General Assembly, the planning of the special tourism promotion tax under the OMD statute, the parking rules, the Poiana Brașov resort regulation; the immediate measures, the express line to the airport, information on arrival, the Terrace Guide as the common reference; the first measurement of the missing baselines (residents, visitors, the census of the centre). The year ends with the first annual destination report, presented to the Local Council.

Between 2028 and 2030 comes application: the zonal urban plan for Poiana and the zone-zero regulation, the single trail map, the revision of the Tâmpa plan, controlled access to the historic centre, the single calendar, the public dashboard, the decision on the bid for the title of European Capital of Culture, the preparation of projects for the European period 2028–2034; the 2030 mid-term evaluation may adjust the targets and measures, but not the ambition and the purpose. Between 2031 and 2034 comes consolidation: the large investments, the first phase of the exhibition centre, the Poiana centre, the pedestrian corridors, the compliance of all establishments in Poiana, the trails classified and marked uniformly; the 2034 final evaluation is the basis of the next strategy.

Who is responsible and with what money

The strategy belongs to the city: the Local Council decides on its adoption and can give it continuity, the authorities keep their powers, and OMD Brașov coordinates implementation, with the mandate approved by the General Assembly, in which the City Hall holds 45% of the votes. The first year retains the priority-1 measures, among them the key measures, and most are acts, agreements and programmes, not investments.

The money comes from four sources: the two special taxes, the special tax for the tourism promotion of the Municipality of Brașov, 7 lei per tourist per night, and the special Salvamont (mountain rescue) tax, 5 lei, which would yield at today's overnight stays about 9.2 and 6.6 million lei a year; public budgets, for acts and programmes; the European funds of the 2028–2034 period, for which the preparation of the large projects starts in 2027, as the programmes and guides are published; and private capital, where the investment is private and the land stays public. Most measures are acts and programmes, with small or yearly costs; investments are financed from European funds and private capital, through projects.



Mount Tâmpa seen from the city · photo: Jocelyn Erskine-Kellie, CC BY-SA 4.0

2027 · 2030 · 2034
the year of foundations; the mid-term evaluation; the final evaluation

77
priority-1 measures in the first year, 35 of them key measures; most are acts, agreements and programmes

7 + 5 lei
per tourist per night: the special tourism promotion tax and the special Salvamont (mountain rescue) tax; about 9.2 and 6.6 million lei a year

How we will know we have succeeded

Monitoring has three levels: whether the measures were carried out, whether the 21 development objectives reached their targets, and what effect it all had on the city. The public dashboard appears every year from 2028; the independent evaluations take place in 2030 and 2034. Above everything stand the two headline indicators, reported together: residents' acceptance of tourism, measured every two years, which may not fall below its 2027 level, and visitor satisfaction, with firm recommendation of the destination rising from 76.7% to at least 80%. Growth that lowers either of them is not counted as success.

The signs of success in 2034 are few and anyone can check them: about 787 million lei of value added from tourism, up from 535 today; a stay of at least 2.0 nights; an occupancy rate of at least 37%, with spring at least 23% of overnight stays; at least four gateways to the Carpathians reachable without a car; an inhabited historic centre; and, at every wave of the national survey, more Romanians who, asked what Brașov is, answer with something other than an inventory.

The risks, named in time

We have named twenty risks, in seven categories, each with a mitigation, an owner and a warning signal. The largest are those of governance, funding and acceptance: that the OMD mandate is not approved or applied; that a funding gap opens between two European periods; that incomplete declaration or non-payment of the special tourism promotion tax by some operators reduces the resources available to the destination; that the people of Brașov begin to perceive tourism as a loss. The strategy does not promise that these things will not happen; it promises to see them in time. The strategy's warnings are written down: ambition does not exceed the capacity to deliver, development is measured in value, the city belongs to its residents, promotion follows development, benefits are spread, carrying capacity has limits, those who apply the strategy are consulted throughout, and continuity across mandates is secured by acts, not by intentions.

How the strategy was built

The strategy was drawn up in 2026, for OMD Brașov, by a consortium led by BrandBerry srl, together with Horwath HTL România and GMP CommUnity. It rests on the consultation of the city, 22 interviews and 12 workshops with residents, operators, institutions and associations, plus a session with the architects and urban planners; on a national survey of how Romanians see Brașov; on 47,513 online reviews of the city and Poiana; on the official statistics of the last two decades and the financial statements of hospitality businesses, from which three scenarios measured in value added were built; on the comparison with European destinations. The brand direction comes from the analysis of the interviews and workshops and from the debriefs carried out by the project manager, as a sociologist and researcher, together with the team's design expert. Every statement in Volume I carries a marker saying what it rests on: data, consultation, estimate or the team's interpretation.

Where it can all be read

Volume I, the strategy document; Volume II, the Full chapters, with all the measures, including chapter II.3, the Poiana Brașov resort strategy, for re-certification; Annex 1, the Implementation plan; Volume III, the Evidence base; the brand brief; "The strategy in brief", in Romanian and English; the magazine-format summaries; the reading edition. All are published on the strategy's website.



"Vederea frumoasă", a sign of the tourism of old, a tradition since 1905 · project archive

80%

firm recommendation of the destination by visitors in 2034, up from 76.7% today

20

risks, in seven categories, each with a mitigation, an owner and a warning signal

22 + 12

consultation interviews and workshops, in 2026; 47,513 online reviews; diagnosis index, 2.54 of 5

Brașov, your friend in Transylvania

PROJECT TEAM

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PHOTOGRAPHS

The autumn photographs of the historic centre, Michael Weiss Street, Tâmpa and the Citadel come from the "Kevin and Amanda" page and are used with the authors' permission. The sunrise and the sea of clouds on Postăvaru, the consultation workshops, the Juni, the ski marker and the "Vederea frumoasă" sign come from the project archive. The greeting map was created by Alexandru Icodin, PhD candidate, visual-identity expert. The photographs of mountain biking and of Postăvaru through a viewpoint frame were made available to the project; the photograph of bus line A1 comes from transilvania365.ro; the others come from Wikimedia Commons, under the licences indicated in the captions.

THE FULL DOCUMENTATION, ON THE STRATEGY WEBSITE

Volume I · Volume II, the Full chapters, with all the measures · Annex 1, the Implementation plan · Volume III, the Evidence base · the brand brief · "The strategy in brief" (RO, EN) · the reading edition

www.brandberry.ro/brasov2034

Contract no. 58/15.05.2026 · Brașov Destination Management Organisation Association · BrandBerry srl (lead partner), Horwath HTL România, GMP CommUnity



The sea of clouds seen from Postăvaru at dawn · project archive