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ANALYSIS OF THE FACTORS DRIVING THE GROWTH OF RURAL TOURISM IN THE REPUBLIC OF MOLDOVA FROM A MARKETING PERSPECTIVE

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Abstract. *This paper identifies the factors that best explain the uneven growth of rural tourism in the Republic of Moldova and assesses the role of destination marketing. Existing studies describe the resource potential, management, and promotion of Moldovan rural tourism, but do not connect promotion with long-term quantitative trends in supply and demand. The study draws on official National Bureau of Statistics data for tourist and agritourist guesthouses (annual series for 2015–2025 and January–June 2026). It compares growth indices for demand (tourists and overnight stays) with those for supply (establishments, rooms, and bed places), uses the net occupancy rate as a consistency check, and compares periods of divergence with the timeline of institutional marketing interventions (ANTRIM, UNDP, USAID, the EU, and the "Tourism 2029" program). Five potential drivers are assessed: capacity expansion, external shocks, institutional destination marketing, European integration, and the residency structure of demand. From 2016 to 2020, tourist numbers fell by 31.7% while the number of establishments rose by 46%. From 2015 to 2025, tourist numbers grew 7.3-fold, compared with a 2.2–2.9-fold increase in supply, while the net occupancy rate rose from 10.7% to 20.8%. In January–June 2026, overnight stays by non-residents increased by 24.6%, while resident stays declined. The findings suggest that destination marketing explains the sector's growth better than infrastructure expansion. The main limitation is the lack of public data on promotion spending, making the relationship identified correlational. The paper's originality lies in linking a decade of sector statistics with the chronology of institutional promotion. Its results support targeted recommendations for Moldova's destination marketing and are relevant to other emerging rural tourism destinations.*

Keywords: *rural tourism, Republic of Moldova, place marketing, destination promotion, agritourism, growth factors*

INTRODUCTION

Over the past decade, the rural and agritourism sector in the Republic of Moldova has grown noticeably yet unevenly. Official statistics from the National Bureau of Statistics (NBS, 2026) for the category "tourist and agritourism guesthouses" show 9,300 tourists in 2015, rising to 21,300 in 2016 – followed by a four-year decline to 14,600 in 2020 (a 31.7% drop from the 2016 peak). Notably, the number of accommodation establishments did not decrease during this period. Rather, it grew – from 26 to 38 units (+46%), and the number of rooms increased from 452 to 492. In other words, the decline in demand occurred against a backdrop of expanding supply, rather than as a result of its contraction.

This observation raises the central question of this paper: if trends in tourist numbers and overnight stays in the tourist and agritourism guesthouse sector cannot be explained by changes in accommodation capacity, what better explains them? The working hypothesis of this article is that destination marketing – specifically, the institutional promotion of Moldova as a destination for rural and wine tourism, the development of the national brand, and the extent to which this promotion is integrated into the broader European tourism landscape – rather than the expansion of physical accommodation infrastructure itself, provides that explanation. To test the hypothesis, this paper systematically compares five potential drivers of growth in the tourist and agritourism guesthouse sector: (1) the expansion of accommodation capacity (supply); (2)

external shocks and seasonality (COVID-19); (3) institutional destination marketing (ANTRIM, donor-funded programs, "Tourism 2029"); (4) the European integration process as a mechanism for international promotion; and (5) the structure of demand based on residency status (residents vs. non-residents). Each factor is evaluated to determine how well it explains the observed dynamics compared to destination marketing – the paper's central hypothesis.

Research on rural tourism in Moldova can be broadly categorized into three groups. The first group comprises studies on the potential and resource base of rural tourism (MIRON, 2002; GLAVAN, 2003; GLAVAN, PLATON, RUSU, 2004; CREST, 2008; GRIBINCEA, BURBULEA, 2010). These works describe the natural, cultural, and ethnographic foundations but do not distinguish between the contributions of supply and promotion to the actual dynamics of tourist flows. The second group – works on the management and sustainable development of the sector (NISTOREANU, GHEREȘ, 2010; NISTOREANU, 2007; ȚURCANU, ROȘCA, 2012; RUSU, MELNIC, BURBULEA, GRAUR, 2014; PLATON, 2014; LAZĂR, 2015; ZAHARCO, 2016; BOTEZATU, 2016) – examines the "Tourism 2020" state strategy and the sector's managerial barriers. The third, more recent group addresses the promotion of Moldova's tourism services in the marketplace and the country's image as a destination (SUSLENCO, 2021; BUZDUGAN, 2018 – the cluster approach as a competitiveness factor; COREȚCHI, CEAIKOVSKII, 2022; CHISTOL, BULAT, 2022; OLTEAN, GABOR, 2022 – wine tourism in the Republic of Moldova and Romania; DOMBROVSCHI, NAZAR, 2023 – ecotourism marketing; HĂMURARU, ȚURCANU, 2023; ȚURCAN, 2025). A related line of research treats the territory itself as an object of marketing: place and rural marketing are viewed as instruments for building the image, competitiveness and investment attractiveness of localities (CHIRIAC, 2020), while studies on cultural tourism emphasize the integration of heritage into tourist itineraries and segment-oriented marketing strategies (CHIRIAC, GRUNZU, 2021). However, these studies do not relate their findings to the quantitative dynamics of supply and demand over an extended period. This paper fills this gap: for the first time regarding the sector of tourist and agrotourist guesthouses in the Republic of Moldova, it compares a ten-year series (2015–2025) of demand indicators (tourists, overnight stays) and supply indicators (establishments, rooms, bed capacity, occupancy rates) with the timeline of institutional marketing interventions – namely, the activities of the National Inbound and Domestic Tourism Association of Moldova (ANTRIM), initiatives supported by donors (UNDP, USAID, the EU), and the state program "Tourism 2029". The paper focuses exclusively on the destination/institutional level of marketing (national promotion, branding, and the context of European integration), rather than on the marketing practices of individual tourism enterprises.

MATERIAL AND METHODS

The empirical basis of this work consists of official statistical data from the National Bureau of Statistics of the Republic of Moldova (NBS, 2026; Statistical Database, section "Occupancy of tourist accommodation establishments"). Two datasets were used:

1. The 2015–2025 annual series for the "Tourist and agrotourist guesthouses" category: number of tourists accommodated, number of overnight stays, number of accommodation establishments, number of rooms, number of bed places, and net capacity occupancy rate (%).
2. Detailed data for January–June 2026, compared to January–June 2025: the same indicators, broken down by residency status (residents/non-residents), by comfort category (separately for tourist guesthouses and agrotourist guesthouses), by territorial profile (districts), and by staff employment.

The analysis compares the growth of demand indicators (number of tourists and overnight stays) with the growth of supply indicators (number of establishments, rooms, and bed capacity) over the same period. It also examines changes in the capacity occupancy rate, which reflects the relationship between supply and demand: a decline in occupancy alongside an increase in capacity suggests that supply is growing faster, while a rise in occupancy indicates faster growth in demand. Periods of divergence, such as an increase in the number of establishments coinciding with a decline in the number of tourists, or vice versa, are examined chronologically in relation to institutional marketing interventions. These interventions are reconstructed using programming and reporting documents, including the "Tourism 2029" National Tourism Development Program (GOVERNMENT OF THE REPUBLIC OF MOLDOVA, 2026), materials from ANTRIM (2026), UNDP reports on clusters and branding for Cahul/Ungheni (2021; UNDP MOLDOVA, 2024), the USAID Moldova Competitiveness Project, and documentation from the Organization for Entrepreneurship Development (ODA) on grant-based support for the tourism sector (ODA, 2026).

Limitations of the methodology: First, the National Bureau of Statistics (NBS) accounts only for officially registered and classified accommodation facilities, thereby excluding the informal segment of rural guesthouses from the analysis. Second, the 2026 data cover a single semester and cannot be directly compared with annual indicators without seasonal adjustment. Third, there is no direct time series available for destination marketing expenditures, which precludes moving from a chronological correlation to a rigorous causal assessment – the proposed analysis is essentially correlational in nature rather than establishing a statistically proven causal relationship.

RESULTS AND DISCUSSIONS

According to Table 1, the 2016–2020 period shows a divergence that cannot be explained by supply-side trends: the number of tourists fell from 21.3 to 14.6 thousand (−31.7%), while the number of establishments rose steadily from 26 to 38 (+46%). The number of rooms also increased, from 452 to 492 (+9%), as did the number of bed places, from 955 to 1,061 (+11%). Supply expanded throughout the period, even as demand declined.

Table 1

Tourist and agritourist guesthouses, Republic of Moldova, 2015–2025 (NBS)

Year	Tourists, thousand	Overnight stays, thousand	Establishments	Rooms	Bed places	Net occupancy rate, %
2015	9.3	24.7	26	428	909	10.7
2016	21.3	35.3	26	452	955	16.1
2017	20.9	36.0	28	409	867	13.5
2018	17.7	37.7	33	454	964	13.5
2019	17.2	36.6	36	468	999	14.3
2020	14.6	19.8	38	492	1061	9.7
2021	21.4	39.0	43	559	1221	12.1
2022	37.3	81.3	47	645	1430	19.5
2023	46.5	76.2	56	729	1632	12.7
2024	51.9	78.9	57	742	1658	16.7
2025	67.8	113.9	74	923	2060	20.8

From 2015 to 2025, demand indicators grew much faster than supply indicators: the number of tourists increased 7.3-fold, and the number of overnight stays 4.6-fold, while the number of bed places grew 2.3-fold, the number of rooms 2.2-fold, and the number of establishments 2.9-fold. Had the sector's growth been driven by an expansion in capacity, one would have expected the occupancy rate to decline or stagnate as new bed places came online; instead, the net occupancy rate nearly doubled – rising from 10.7% in 2015 to 20.8% in 2025. This indicates that demand grew more rapidly than the accommodation base could expand – the opposite of what would be explained by a simple increase in supply.

The sharpest surge in demand occurred between 2021 and 2022: tourist numbers increased by 74% (from 21.4 to 37.3 thousand), while the number of establishments grew by only 9% (from 43 to 47). This period coincided with the UNDP's 2021 launch of the Cahul and Ungheni destination brands (UNDP MOLDOVA, 2024) – the first of their kind in Moldova and the country's attainment of EU candidate status in 2022, which brought increased international visibility. The year 2020 warrants separate mention: the recorded decline, with the occupancy rate falling to 9.7% – the lowest point in the entire period coincided with the global shock to tourism caused by the COVID-19 pandemic. This decline cannot be attributed to a marketing failure, as it stemmed from an external factor unrelated to the hypothesis being tested.

In the first half of 2026, tourist and agritourism guesthouses welcomed 31.0 thousand tourists, up 10.9% from January–June 2025. This included 22.7 thousand residents (+11.5%) and 8.2 thousand non-residents (+9.2%). However, overnight stays increased by just 2.8%, to 49.1 thousand. Stays by residents fell by 4.5%, while those by non-residents rose by 24.6%. The increase in resident tourists has not translated into longer stays, as short visits are becoming more common. By contrast, the non-resident segment continues to grow in both visitor numbers and length of stay. This pattern is consistent with the role of institutional promotion abroad, including ANTRIM's activities and participation in international tourism trade fairs, although the available data do not allow its effect to be separated from other possible drivers.

At the same time, tourist and agrotourist guesthouses have a gross occupancy rate of 16.3% during this period, notably below the 28.1% market average for all accommodation types. The sector has a reserve capacity of 4,589 rooms and 9,759 beds, which does not constrain growth. Tourist flows are concentrated in the Orhei District, which accounts for 13,100 of the Central Region's 37,800 tourists. The area has well-developed tourism infrastructure and actively promotes the Orheiul Vechi complex and wine routes. This is consistent with the view that cultural heritage becomes a tourism resource when it is built into itineraries and promoted through strategies targeted at specific segments (CHIRIAC, GRUNZU, 2021). This suggests an indirect, but not direct, link between tourist flows and the targeting of marketing efforts.

ANTRIM – the National Inbound and Domestic Tourism Association of Moldova plays a key role in promoting rural and wine tourism in Moldova (ANTRIM, 2026). It manages the "moldova.travel" portal, develops the "Tree of Life" ("Discover the Routes of Life") national brand, and coordinates international promotional campaigns, including a promotional concept for the Swiss market built around the autumn off-peak product – the grape harvest, the Wine Route of Moldova and National Wine Day; the concept was presented at Moldova Business Week in autumn 2026 and therefore falls outside the period covered by the data (LOGOS-PRESS, 2026). Donor-supported interventions include the UNDP's cluster-based approach (clusters in Cahul, Ungheni, and Dubăsari, 2021–2024, with branding developed for two of them), the USAID Moldova Competitiveness Project, which is directly linked to the promotion of Moldova's tourism services in foreign markets (cf. SUSLENCO, 2021, regarding Moldova's image

on the international stage), and technical assistance from the EU on the sector's communication strategy.

The "Tourism 2029" state program (allocated 618.2 million lei for 2026–2029), approved in 2026 (GOVERNMENT OF THE REPUBLIC OF MOLDOVA, 2026), includes the promotion of tourism offerings through digital solutions and the modernization of the national brand as key objectives, alongside infrastructure development. Another avenue is the ODA grant program (ODA, 2026), which offers up to 500,000 lei with 70% co-financing and explicitly lists online campaigns, printed materials, familiarization trips (infotours), and other marketing activities as eligible expenses, thereby making the expansion of tourism offerings contingent on a mandatory marketing component.

The timing of intensified institutional efforts (2021–2022, 2026) alongside observed demand surges, while supply grew noticeably more slowly during those same periods, is consistent with the article's working hypothesis. Assessing causality directly would require data on promotional spending over time, which are not publicly available. The observed link is therefore treated as a substantial correlation, not proven causality.

Below, each of the five factors is evaluated based on the extent to which it explains the observed dynamics better than destination marketing does:

1. The expansion of accommodation capacity (supply) is not supported by the data as an explanatory factor: between 2016 and 2020, supply increased (+46% in the number of establishments), while demand declined (−31.7%). Over the entire 2015–2025 period, supply grew by a factor of 2.2–2.9, whereas demand increased by a factor of 4.6–7.3. The relationship is either inverse or noticeably weaker than that observed for the demand indicators.
2. The external shock and seasonality associated with the COVID-19 pandemic in 2020 explain the occupancy rate's decline to a period low of 9.7%, coinciding with the global collapse in tourism. However, this was an exogenous, one-off event, not a systematic explanation that competes with marketing for the observed dynamics, so it is treated separately from the main hypothesis.
3. Institutional destination marketing (ANTRIM, UNDP/USAID branding, the "Tourism 2029" program, and the ODA grant scheme) shows the strongest and most consistent temporal correlation: demand surged by 74% in 2021–2022, coinciding with the launch of the Cahul and Ungheni brands in 2021 and a broader intensification of international promotion. In addition, the "Tourism 2029" program, approved in 2026, explicitly includes a marketing component. Among all the factors analyzed, this temporal correspondence is the most consistent.
4. European integration (Moldova's attainment of EU candidate country status in 2022) also coincides with the leap seen in 2021–2022, yet it operates indirectly: not as an independent driver of demand, but as an amplifier of the country's international visibility and the legitimacy of the country brand, in other words, as a channel for the very same marketing mechanism.
5. The breakdown of demand by residency status reveals that the growth is concentrated precisely in the segment most exposed to external promotion: in the first half of 2026, non-residents show consistent growth in both visitor numbers (+9.2%) and overnight stays (+24.6%), whereas for residents, only the number of visits increases (+11.5%), accompanied by a decrease in their duration (−4.5%). Residency status thus works as a geographic segmentation criterion that separates two target groups with different

consumption behaviour and, consequently, different marketing requirements (CHIRIAC, 2021).

Of the five factors analyzed, three (3, 4, and 5) are linked, directly or indirectly, to destination marketing and show the most consistent correlation with the observed trends. The supply factor (1) is not supported by the data as an explanatory variable, while the external shock (2) is a one-off, non-recurring event. This supports the study's central conclusion: the growth of the tourist and agrotourist guesthouse sector in the Republic of Moldova between 2015 and 2025 is better explained by destination marketing than by the expansion of physical infrastructure.

CONCLUSIONS

The analysis indicates that changes in the tourist and agrotourist guesthouse sector in the Republic of Moldova from 2015 to 2025 cannot be explained by increased supply alone. From 2016 to 2020, demand declined steadily even as accommodation capacity continued to expand. By contrast, from 2021 to 2025, demand grew rapidly while capacity expanded much more slowly: demand increased 7.3-fold, compared with a 2.2–2.9-fold rise in supply indicators. Occupancy rates also rose rather than fell, ruling out excess supply as the driver of growth. Data from January to June 2026 add further detail: domestic visitors make short trips that are not getting longer, while the sustained increase in both visits and length of stay is driven by non-residents, a group most exposed to the destination's institutional promotion abroad.

This leads to a set of applied recommendations:

1. Further expansion of accommodation capacity is not a short-term priority because the sector's occupancy rate (16.3% gross in H1 2026) is less than half the market average, indicating that spare capacity already exists.

2. The priority is to replicate the targeted destination-branding model used in UNDP's work with Cahul and Ungheni in other rural areas with a distinct tourism product, such as wine routes or ethno-tourism, rather than offering one-off infrastructure grants without a required marketing component.

3. A distinct approach is required for the domestic market: the fact that residents' visits are becoming increasingly short points either to a lack of "long-duration" product offerings (multi-day itineraries, travel packages) or to insufficient promotion of such products within the country. Promotion in the domestic market differs from promotion in foreign markets.

4. Continuing and expanding external promotion efforts, such as ANTRIM campaigns (including the Swiss-market concept presented in autumn 2026, whose effect can only be assessed with post-2026 data), participation in international trade fairs, and donor-funded programs, is statistically justified. It is precisely the non-resident segment that shows the most consistent growth in both the number and the duration of visits.

5. To confirm a causal link rather than a merely chronological one between marketing interventions and demand dynamics, a time series of destination promotion expenditures is required; the current absence of such data is a methodological limitation not only for this study but also for evaluating the overall effectiveness of the "Tourism 2029" program.

The approach presented, which compares supply and demand dynamics with the timeline of institutional marketing, can also be applied to other countries with an emerging rural tourism sector, where destination promotion is not systematically analyzed as an independent growth factor, distinct from the expansion of physical infrastructure.

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