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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: *The growth of rural tourism in Moldova between 2015 and 2025 has been uneven and cannot be explained by an expansion in the number of available rooms. Based on data from the National Bureau of Statistics (NBS) regarding tourist and agritourism guesthouses, the dynamics of supply and demand are compared against the timeline of institutional destination marketing. The growth of the sector is better explained by destination promotion than by infrastructure development.*

• Introduction

Between 2015 and 2025, the sector of tourist and agritourism guesthouses in Moldova experienced uneven growth. From 2016 to 2020, the number of tourists declined by 31.7%, even as the number of accommodation facilities increased by 46%. This suggests that demand was not constrained by a lack of available lodging.

This leads to the research question: what factors explain the sector's dynamics better than accommodation capacity? We hypothesize that the answer lies in destination marketing – specifically, the institutional promotion of the country, the development of a national brand, and its integration into the broader European tourism landscape. While existing literature explores the potential and promotion of rural tourism, it often fails to link these elements to long-term quantitative trends in supply and demand.

This study draws on the concept of place marketing: promotional efforts shape the image, competitiveness, and appeal of a destination (Chiriac, 2020), while heritage is transformed into a tourism resource when it is incorporated into travel itineraries and marketed toward specific target segments (Chiriac, Grunzu, 2021).

• Material and methods

The analysis is based on National Bureau of Statistics (NBS) data regarding tourist and agrotourist guesthouses, covering the annual period from 2015 to 2025, as well as the first half of 2026, with a breakdown by residents and non-residents. We compared the growth rates of demand (tourists, overnight stays) and supply (establishments, rooms, bed capacity) and assessed their relationship via the net occupancy rate.

Periods of divergence were cross-referenced with the timeline of institutional promotion efforts – including the activities of ANTRIM, projects supported by the UNDP, USAID, and the EU, and the "Tourism 2029" program. This allowed for the evaluation of five potential growth factors: accommodation capacity, external shocks, destination marketing, European integration, and the structure of demand. A factor was considered explanatory if its fluctuations coincided with shifts in demand and remained consistent with occupancy trends.

As data on promotional expenditures are not publicly available, the identified relationship is correlational rather than causal.

• Results and discussions

Table 1

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

Year	Tourists, thousand	Overnights, thousand	Establish-ments	Rooms	Bed places	Net occupancy, %
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

As shown in Table 1, supply and demand followed different trajectories. Over a ten-year period, the number of tourists increased 7.3-fold and the number of overnight stays 4.6-fold, while the number of establishments, rooms, and beds grew by only 2.2–2.8 times; the net occupancy rate rose from 10.7% to 20.8%. Had growth been driven by capacity, the occupancy rate would have declined –yet, in fact, it increased.

The sharpest surge occurred between 2021 and 2022, with a 74% increase in tourists against a 9% rise in the number of establishments. This coincided with the launch of the destination brands for Cahul and Ungheni (UNDP, 2021) and the granting of EU candidate status (2022). The downturn in 2020 was due to the pandemic, not marketing factors.

In the first half of 2026, overnight stays by non-residents increased by 24.6%, while those by residents fell by 4.5% – indicating growth specifically within the segment targeted by external promotional efforts.

• Conclusions

The sector's growth is better explained by destination marketing than by infrastructure expansion. Guesthouse occupancy (16.3%) is almost half the market average (28.1%), so the priority is not new capacity but replicating destination branding in other rural areas and developing a "longer" product for the domestic market. Assessing causality requires public data on promotion spending.