

DEVELOPMENT TRENDS OF THE RURAL TOURISM INDUSTRY IN THE REPUBLIC OF MOLDOVA

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Abstract

The national tourism development policy is geared towards promoting the country's image, aimed at generating domestic, regional and international tourism demand. The Republic of Moldova, as a tourist destination, is little known abroad, compared to the destinations of neighboring countries, yet the central and non-governmental authorities are constantly engaged in developing and strengthening the regulatory and promotional framework of standardized information packages, which would make the image of our country more attractive. Following the social, political and regional conjuncture, the development of rural tourism is a niche that can be efficiently developed in the context of the development of the tourism industry in the Republic of Moldova.

Keywords: *sustainable development, rural tourism, development policy, investment project.*

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Introduction

Rural tourism in Moldova is developing at lightning speed, and every year more and more new farms emerge, ready to welcome guests. This is due to the fact that Moldova has managed to preserve its treasure trove of culture, traditions and folk customs.

Rural tourist resorts are basically households organized on the basis of ordinary village houses. The house may be old, but guests are offered all the necessary amenities: shower, heating, comfortable furniture, internet connection. All efforts of the hosts are aimed at familiarizing guests with the life of the Moldovan people, so that the guests live in the village and at the same time do not feel any discomfort.

Guests are mainly offered dishes of the national cuisine, prepared from vegetables, fruits, meat, and dairy products that the hosts produce in their households. Usually, the households are located on the waterfront, so there is also the possibility of fishing, boating, swimming and sunbathing. In addition to water activities, there are horse and carriage rides, cycling and walking tours, visits to tourist attractions, and cultural programmes.

Picnics in nature, which is exceptionally beautiful in Moldova, and mass events (celebrations, conferences, lunches) are organized in tourist resorts. Such a farm can also be visited without staying overnight.

Results and discussions

The analysis of the national tourism sector, prepared by the Information Society Development Institute, highlights a number of competitive advantages, positive trends and milestone progress, as follows:

Evolution of the institutional framework for tourism. The tourism sector has been managed for some time by a distinct national authority, directly subordinated to the Government. The National Tourism Agency had its own College and was assisted by the Tourism Advisory Council. It managed the public budget for tourism development needs. The public policies promoted in tourism are focused on developing domestic and inbound tourism, enhancing the country's tourism image, supporting SMEs for local economic diversification. Since 2000, the existence of governmental structures for tourism management has contributed to the adoption of sectoral legislative documents, to the creation of conditions for attracting foreign funding in the tourism sector, to the launch of the promotional process of Moldova's image as a tourist destination, etc. Over the last two decades, the establishment of non-governmental organizations (ANAT, ADTM, ANTREC Moldova, APIT, ANTRIM, Cheia satului, etc.) attract foreign funding for tourism development projects in Moldova [1].

The legislation of the Republic of Moldova in the tourism sector. The general regulatory framework favors the development of entrepreneurship, including in tourism. The Republic of Moldova has a distinct tourism legislation. Investment in national tourist areas is also encouraged. The formulation, approval and implementation of strategic branch documents will support the enhancement of the national heritage as one of the priorities of the tourism sector.

Development and implementation of tourism policy documents. Moldovan tourism is well covered by regulatory instruments. These have become clearer with the updating of normative acts.

Investment promotion. Moldovan tourism is becoming an interesting sector for investment due to a simplified regulatory framework in the Republic of Moldova, public policies favoring service exporting industries, focus on enhancing the country's competitive advantages, support for projects to raise the country's positive image in target markets. Major donors to Moldova support large-scale projects for the rehabilitation of general road infrastructure and access to quality services. Turnover in the tourism sector is increasing. Investment is increasing. Therefore, despite the economic crisis and stagnation in the sector, entrepreneurs are investing heavily in business development. Increased interest of Local Public Authorities (LPAs) in tourism as an alternative for the development of the local economy, as a result, leads to more local, regional, national tourism projects implementation by attracting external and domestic funding. The increasing number of private initiatives leads to the development of tourist reception facilities and specially designed places for tourist activity (tourist infrastructure) in addition to heritage objects [2].

International collaboration. In recent years, Moldova has been making a sustained effort to participate in representative tourism partnerships. The Republic of Moldova is party to multilateral tourism agreements as well as bilateral tourism agreements signed with visitor-generating countries. Moldova promotes itself with permanent participation in tourism fairs in Romania, Russia, Germany, and other countries.

Evolution of performance in specific tourism sectors. Tourism is a complex sector, which provides commercial hospitality to the country's visitors, makes non-degrading economic use of the important and attractive heritage, diversifies the local economy, and provides recreational services to the population and visitors. Moldovan tourists are increasingly responsible for the development of the sector and their needs are increasingly demanding in terms of quality. Moldovans represent important segments of the tourist market in some countries in the region.

Tour operators and travel agencies. Moldovan tourism intermediaries are the largest organized consolidators of tourist flows as well as being excursionists on national and regional routes. Their activity is visible in the continuous rise in Moldovan mobility through the region. The number of tour

companies is increasing, which ensures positive dynamic revenues from outbound organized tourism. Revenues from serving business tourists are generally positive (apart from the pandemic period), but are more exposed to external factors. Leisure tourism for foreigners in Moldova has also had a positive dynamic. Recently, Moldovans have been spending more and more money abroad, including through tourist agencies. Thus, Moldovan tourists are the most important clients of national travel agencies.

Tourist accommodation and food service establishments. In the Republic of Moldova there are more than 250 active accommodation establishments with a total of about 30 thousand places: 3/5 are rest structures with a total of more than 75% of the total accommodation, about half of the accommodation structures are permanently active. The hotel sector has restored the number of accommodations to the level reached in the year 1998 after a major decline, it has hired more staff, introduced a new accommodation fund on the market, including outside the Chisinau municipality. The number of accommodation units in Chisinau has greatly increased. Over a hundred conference rooms can be found in accommodation facilities in the Republic of Moldova, more than half of them in 3-5 star comfort structures. The national classification system (currently voluntary), established in 2003, allows accommodation activity in 12 categories of establishments. In recent years more investment has been made in the construction of permanent accommodation facilities. Investments are mainly promoted by private companies.

Organization of excursions. Guides' work. The Republic of Moldova is a small country with a great diversity of tourist attractions, located at short distances from the main cities - hotel centers. Excursions allow visitors to get directly acquainted with the tourist attractions of various destinations in Moldova. A significant number of the country's visitors from the organized tourism network purchase excursions from national travel agencies, with the national excursionist forming the largest contingent. Excursions in the Republic of Moldova remain cheap and accessible to a large number of customers. Their cost ranges from 6-7 euro/person in a group for an excursion of up to 100 km round trip and up to 50-60 euro/person in a group for a wine tasting. The most popular excursions remain: wineries, Chisinau municipality, monasteries, which form the general offer for inbound domestic and international tourism [1].

Car transport. The Republic of Moldova is criss-crossed by major roads connecting the country to markets in the region. Car transport is the most commonly used means of travel to and within Moldova. Access points into the country are relatively evenly distributed around the perimeter of the state border, which benefits international passenger traffic. About 4 million foreign citizens enter the country annually. The internal road network is relatively diversified. The road reconstruction programme makes the repair of these roads a priority and, as a result, a significant number of national tourist routes will be repaired.

Tour companies and other travel organizers prefer 2/3 car transport on international routes and 100% on domestic routes. Travel agencies have developed a system of national tourist routes, 7 of which are part of a national "Wine Route" programme, another 5 have been defined by national guides. Most of the functional routes have a high degree of use of national roads, to which up to 10% of local roads are connected.

Man-made and natural tourist attractions. National attractions are the main reasons for traveling to Moldova. There are over 15 thousand man-made tourist attractions and over 300 important natural areas in Moldova. The development of tourist heritage objects is ensured by territorial tourism planning in accordance with the urban and spatial planning documentation.

Forested areas represent an important tourist attraction potential for Moldova (approx. 11.6% of the country's territory). About 45% of the total are recreational and nature conservation forests, and should be used for excursion activities, organized recreation and spa treatment as alternatives to various types of non-organised tourism. Tourist facilities for national recreational areas related to water basins (Vadul-lui-Vodă, Soroca, Vatra, etc.) are clearly regulated in Moldova. There is a complex system of natural areas under state protection in the country: 12 categories of protected natural areas, including 3 Ramsar sites, 178 different types of reserves, 130 nature monuments and 433 secular trees.

Several thousand prehistoric settlements have been attested in Moldova, about 400 Tripolian settlements (~ 5-6 thousand years ago), about 50 ancient fortified hillforts, about 500 early medieval settlements, numerous medieval earthen fortresses, 6 medieval stone fortresses (in various stages of preservation), over 1000 protected architectural monuments, about 50 Orthodox monasteries.

Tourist attractions found in the localities (monasteries, churches, museum complexes, parks) benefit from local access roads, which are relatively well maintained throughout the year.

There are about 30 professional tour guides in Moldova, who know the routes to national attractions and are employed by about 85 travel agencies in Chisinau and by educational institutions. There are about 350 local guides who are usually employed by local museums and who make on-demand extra-museum excursions to specific local attractions. A local guide can be hired within 30 km of any tourist attraction in Moldova [7].

Activities and programmes are promoted to preserve and restore the material heritage, especially the built and spiritual heritage (traditions, customs, folk crafts, folk art and theater, traditional costumes, local legends, etc.). This is leading to a significant increase in the interest of Moldovan citizens in their own historical heritage, and to an increasingly active practice of tourism at national level.

Organization of rest and leisure. A system of recreational areas related to water basins of national importance is currently established on the territory of the Republic of Moldova. Beaches are the most frequently used form of water basin recreation areas. About 12% of domestic travelers use an agency to organize their rest on the national territory. $\frac{3}{4}$ of the accommodation fund in Moldova is specialized specifically for the leisure of citizens and guests. About 60% of accommodation is concentrated in summer camps for children and about 20% - in recreational resorts. The increasing number of consumers in camps, and the addition of new capacities to the tourist circuit create opportunities for the revival of several tourist destinations.

At the same time, we would like to point out that the national system of tourism development should be focused on the delimitation of national and local tourist areas, and not on tourist routes, which represent the commercial offer of intermediaries on the tourist market, located in the capital. Tourism zoning is conceived by specialists as the division of a vast territory into relatively homogeneous areas in terms of tourism activity or tourism potential. A tourist area is therefore a large, geomorphologically complex territory which includes several tourist attractions, localities or complexes and which may have a particular characteristic, thus making it possible to distinguish from other areas or sub-areas. Usually, they are 30-50 km in diameter, and one or more tourist resorts are located within this territory. Resorts are localities with special tourist potential and various facilities for receiving tourists. They are national and local, and in some countries are certified by national tourism authorities according to the fulfillment of minimum criteria relating to the natural setting, environmental quality, access to the resort, facilities and services.

According to Republic of Moldova's Law on the organization and development of tourism activity on the national territory, rural tourism is defined as a form of tourism carried out in the rural

environment and oriented towards the use of local tourist resources (natural, cultural, etc.), knowledge of the rural environment, their specific activities, local customs and traditions, farmer households, etc.

The National Bureau of Statistics informs that in 2021 collective tourist accommodation facilities with accommodation functions were frequented by 178.2 thousand tourists or 2.0 times more than in the previous year, against the background of the reduction of the indicator in question in 2020 compared to 2019 by about 284.4 thousand tourists (4.1 times). Of the total number of tourists, 109.3 thousand (61.4%) were resident tourists and 68.9 thousand (38.6%) - non-resident tourists.

Compared to 2020, the number of resident tourists staying in collective tourist accommodation increased by about 1.8 times (by 47.7 thousand tourists) in 2021, of non-resident tourists - by 2.4 times (by 40.1 thousand tourists). The increase in the number of tourists staying in collective tourist accommodation establishments in the reporting year compared to the previous year is due to the increase in their accommodation in hotels and motels - by 49.4 thousand tourists (+97.6%), in rest structures - by 18.3 thousand tourists (2.6 times), in accommodation structures - by 10.7 thousand tourists (+97.4%), in tourist and agritourism inns - by 6.8 thousand tourists (+46.9%), holiday camps - by 2.6 thousand tourists (12.7 times).

In the reporting year, the share of tourists in the total number of tourists who preferred to stay in collective tourist accommodation facilities in the municipality of Chisinau was 59.1%, the Centre regions of development - 23.9%, South - 8.2%, North - 7.3% and ATU Gagauzia - 1.5%.

Table 1. Number of tourists staying in collective tourist accommodation in 2021

Indicators	Year 2021		Year 2021 in % compared to year 2020		Informative: Year 2020 in % compared to year 2019	
	Tourists, thousands	of which non-residents, thousands	Tourists	of which non-residents	Tourists	of which non-residents
Total	178.2	68.9	197.3	239.6	24.1	16.5
Hotels and motels	100.0	59.7	197.6	234.6	23.7	16.5
Visitor dormitories	2.6	-	103.8	-	50.1	-
Tourist and agritourism inns	21.4	3.2	146.9	249.9	84.9	20.9
Recovery structures	21.6	0.2	197.4	171.6	34.1	12.8
Rest structures (tourist villas, holiday villages and other rest structures)	29.8	5.8	by 2.6 times	303.4	20.6	15.0
Holiday camps for pupils	2.8	-	by 12.7 times	-	0.4	-

Source: <https://statistica.gov.md/ro/statistic-indicator-details/11>

The largest shares in the total number of non-resident tourists staying in collective tourist accommodation were accounted for by tourists from Romania (27.6%), the Russian Federation (12.3%), Ukraine (11.9%), the United States of America (7.2%), Turkey (4.4%), Germany (4.1%), Italy (3.7%),

United Kingdom of Great Britain and Northern Ireland (3.4%), Poland (2.7%), Israel (2.6%), France (2.0%), Netherlands (1.2%), Canada (1.1%), Bulgaria (1.0%), Czech Republic, Spain, Belgium and Austria (0.9% each).

In 2021, a total of 762.9 thousand overnight tourist stays were registered in the collective tourist accommodation establishments, 386.9 thousand overnight stays (2.0 times) more than in 2020, against the background of a 4.2-fold decrease in this indicator in 2020 compared to 2019. The increase in the number of overnight tourist stays was conditioned by an increase in the number of overnight stays at recovery structures - by 160.0 thousand overnight stays (by 2.0 times), hotels and motels - by 131.9 thousand overnight stays (by 2.3 times), rest facilities - by 49.9 thousand overnight stays (by 3.8 times), holiday camps - by 27.0 thousand overnight stays (by 9.7 times), tourist and agritourism inns - by 19.3 thousand overnight stays (by 2.0 times). At the same time, the number of overnight stays in visitor dormitories decreased by 1.1 thousand overnight stays (-1.7%). 79.2% of the total number of overnight stays were accounted for by resident tourists and 20.8% by non-resident tourists.

Table 2. Number of overnight stays of tourists in collective tourist accommodation establishments in 2021

Indicators	Year 2021		Year 2021 in % compared to year 2020		Informative: Year 2020 in % compared to year 2019	
	Overnight stays, thousands	of which by non-residents, thousands	Overnight stays	of which by non-residents	Overnight stays	of which by non-residents
Total	762.9	158.6	202.9	225.4	23.6	18.2
Hotels and motels	236.3	137.9	226.3	223.2	23.8	18.5
Visitor dormitories	68.5	-	98.3	-	88.3	-
Tourist and agritourism inns	39.0	7.5	197.6	214.8	54.0	20.5
Recovery structures	320.9	2.0	199.4	180.1	34.3	12.1
Rest structures (tourist villas, holiday villages and other rest structures)	68.0	11.3	376.1	280.7	11.2	16.4
Holiday camps for pupils	30.1	-	970.4	-	0.8	-

Source: https://statistica.gov.md/ro/statistic_indicator_details/11

In 2021 the number of accommodation places offered to tourists was 122.7 thousand bed places or 28.4 thousand bed places (+30.1%) more than in 2020. The increase in the number of places offered to tourists was conditioned by an increase in the number of places offered in rest facilities and hotels and motels - by 7.7 thousand bed places (+53.6% and +15.7% respectively), recovery structures - by 4.4 thousand bed-places (+25,6%), holiday camps - by 4,0 thousand bed-places (2,2 times), tourist and

agritourism inns - by 3,9 thousand bed-places (+58,5%), visitor dormitories - by 700 bed-places (+19,1%).

The net utilization rate of tourist accommodation capacity in 2021 was 20.3%, of which: at visitor dormitories - 51.3%, accommodation facilities - 48.6%, hotels and motels - 13.5%, holiday camps - 13.3%, tourist and agritourism inns - 12.1%, rest structures - 10.1%.

The average length of stay of a tourist in a collective tourist accommodation establishment with accommodation functions in 2021 was 5.3 days (6.5 days - for resident tourists and 3.3 days - for non-resident tourists).

In recent years, tourism has become an increasingly important branch for the economy of the Republic of Moldova. Moldovans eager to contribute to the development of this branch have taken advantage of the programmes offered by the EU to launch a number of unique businesses for our country.

For example, with the help of two EU-funded programmes: PARE 1 + 1 and Women in Business, which support SMEs and start-ups in rural areas via ODIMM and EU4Business, several original ideas in the field of rural tourism have been developed. One of the top priorities of EU's support to Moldova in rural areas is to develop successful rural entrepreneurship by supporting the SME sector and creating jobs in rural areas. Through this project, financed by the European Union and the state budget, implemented by the Organisation for the Development of the Small and Medium-Sized Enterprise Sector, support is provided for the development of small businesses, especially in rural areas, and strengthening of a support infrastructure in this field throughout the country.

In the Vorniceni village of Straseni district, a business based on the idea of a picturesque trail linking four neighboring localities in the historical area "Vatra Dumeniului" or Vatra Domnului has been launched. The initiators of the idea managed to build a museum in Vorniceni, collecting antiques and handicrafts that the locals have inherited from their parents, grandparents and ancestors. According to the legend, the place got its name of Vatra Dumeniului because, in the time of Alexandru cel Bun, this was the place where people settled, called "dumenii", the basic purpose of the destination was to promote the history of the region. Through the "Women in Business" programme, the owners received a grant that enabled them to buy a modern engraving laser, a 3D printer and a paint compressor, which are used to make and sell souvenirs.

An eloquent example is the Manas YurtVillage Inn in the village of Leodroaia, Calarasi, which is a "village" with 12 yurts, decorated according to Kyrgyz traditions and models. Each cottage (yurt) is completely unique and designed for the comfort of the guests; there are single and double beds. Additionally, various activities such as meditation, yoga, children's workshops and various masterclasses can be held on the grounds of the inn. At the same time, the owners offer space for organizing various celebrations, exhibitions, concerts, festivals, trainings or seminars. The inn also offers a guide for visiting nearby monasteries, such as Hârbovăț, Hârjăuca or Frumoasa Monastery. You can also visit the sanatorium "Codru", the private museum of handicraft folklore "Casa Padre", the Ciolac-Malski family estates, the reserve "Plaiul Fagului", as well as go on an excursion to the center of Călărași, with a visit to the Museum of History and Ethnography. The tourist destination offers Moldova's guests the opportunity to learn about the history and culture of Central Asia. The business received financial support from the EU through PARE 1 + 1 as part of the EU4Business Initiative and the value of the grant was 250,000 MDL (14,000 USD).

Thanks to a grant of 139,000 MDL (USD 7,795) from the EU, a unique artificial salt mine was launched in Rezina in 2018 with salt lumps brought from Romania. The destination offers visitors the benefits of salt therapy in combination with other recreational services.

Another successful business is a company promoting tourism, leisure activities and, last but not least, water sports, namely SUP (stand-up paddle-boarding), organized in the summer months in the form of SUP trips on the Nistru and Prut rivers, as well as on several ponds. With the money provided by the Programme, it bought the equipment needed to organize the inflatable board tours. The grant also made it possible to promote the new activities in Moldova.

The European Union has provided investment in rural communities in the regions of Cahul and Ungheni. These include initiatives to promote sustainable rural tourism, support for existing businesses - equipping bakeries, poultry farms and small dairy businesses with modern equipment. The following regions have been developed under this programme: the Local Action Groups "Lunca Prutului de Jos", "Movila Măgura", "Cișmeaua Sudului" and "Valea Halmagei", which have received assistance totalling €200,000, and European funds invested in community development projects and the creation of new jobs in villages in the Cahul and Ungheni regions. Each local action group receiving a grant of €50,000 launched local calls for project funding. The project involves 47 micro-development projects aimed at developing rural communities in the Cahul and Ungheni regions. The implementation of the micro-projects contributes to new job opportunities and sustainable development of the communities through the use of green solutions, such as LED technology for the extension of public lighting in several localities, equipping local businesses with modern and energy-efficient technologies, as well as the promotion of cycling through the installation of eco-friendly transport parking facilities. LAGs attract significant investment at EU level thanks to the innovative and participatory European LEADER approach, thus contributing to the reduction of economic and social imbalances and urban-rural disparities. In Negurenii Vechi, the initiative of the Movila Măgură LAG has resulted in the harvesting of apples using modern technology, the upgrading of the local shop and the promotion of the locality through the organization of virtual exhibitions. According to the same principle, the LAG initiative "Valea Halmagei" has achieved the creation of at least 12 new jobs, mobile vulcanization services, ecological technologies in the field of viticulture, development of a multifunctional park, extension of public street lighting, etc.

There are currently 32 Local Action Groups registered in Moldova, covering 35% of rural areas.

In order to support national tourism, the Government's draft decision on the establishment, organization and functioning of the public institution "National Office of Tourism and Creative Industries" developed by the Ministry of Culture is currently under public consultation. The institution aims to ensure the necessary institutional framework for the implementation of state policy regarding tourism and creative industries, as well as the efficient coordination of domestic tourism development activities, the promotion of the country as a tourist destination abroad; the protection of the subjects' rights in legal relations in the field of tourism, as well as ensuring the provision of tourism services at international standards; expanding and strengthening the creative industry in Moldova, increasing the added value of sales of products and services from the creative industry, developing professional skills and stimulating talent, promoting Moldova as a country with high potential in the creative fields, encouraging foreign investment, including through entrepreneurial initiatives to create and develop creative start-ups. Thus, the public institution "National Office of Tourism and Creative Industries" will have the mission of coordinating and organizing activities aimed at ensuring the implementation of public policies in the field of tourism and creative industries, developing domestic tourism and

promoting the country as a tourist destination abroad; protecting the rights of subjects of legal relations in the field of tourism; as well as ensuring the provision of tourism services at international standards, expanding and strengthening the creative industry in Moldova, promoting Moldova as a country with high potential in the creative fields, encouraging foreign investment, including through entrepreneurial initiatives for the creation and development of creative start-ups.

Conclusions:

The orientation of investments towards the development of rural tourism would be an opportune direction to exploit the tourism potential for the Republic of Moldova in the context of respecting the principles of sustainability in order to promote rural tourism over urban tourism.

Our country offers exceptional destinations that can be exploited at the level of promotions intended for the Orheiul Vechi region, for this purpose there are multiple financial opportunities offered by the European Union in the form of grants for the development and promotion of the native and Moldovan households in order to familiarize tourists with the taste of the national specific, and at the same time, to benefit from the financial flows generated by tourism.

For a comprehensive approach to the development of tourism in the Republic of Moldova, the central authorities are working on projects aimed at developing this sector, one of them being the Draft Government Decision on the establishment, organization and functioning of the public institution "National Office of Tourism and Creative Industries", developed by the Ministry of Culture.

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