Tourism Market Segmentation and Marketing Journey Profiling under the Second Competitiveness Enhancement Project (CEP II)

Final Report

October 2021

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Table of Contents

Section 1) Program Introduction

Section 2) Rapid Industry Assessment Findings

Section 3) Market Segmentation Research Findings and Conclusions

Section 4) Value Chain and Customer Journey Analysis

Section 5) Recommended Interventions

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Section 1) Program Introduction

Program Objective

Conduct market research and segmentation to determine which markets have the most potential for growth in Moldova and will help inform strategic interventions that can assist Moldova to attract investment and become a well-known tourism hub.

Program Deliverables

Deliverable
Inception Report: Included information on the proposed methodology and our understanding of supply and demand in the destination
Progress Report #1: Included findings and conclusions from market segmentation research
Progress Report #2: To include the validated priority market segments, value chain analysis and a customer journey analysis
Progress Report #3: Recommended interventions that could support the development of the market segments
Final Market Segmentation Report

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Segmentation Research Methodology

The segmentation methodology and findings were achieved through the following research methods:

- **A rapid industry assessment** comprised of local stakeholder interviews to illuminate the opinions and perceptions of those currently working in the tourism industry
- **International traveler surveys** to understand their attitudes, opinions, behaviors and preferred activities and define hyper-targeted segments (or buyer personas) with the greatest demand potential for Moldova tourism offerings

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Section 2) Rapid Industry Assessment Findings

Rapid Assessment Process

A questionnaire was circulated to local industry stakeholders to collect inputs on:

- Current and priority markets
- Travel behaviors of visitors
- Key attractions and events
- Impacts and priorities for COVID-19 recovery

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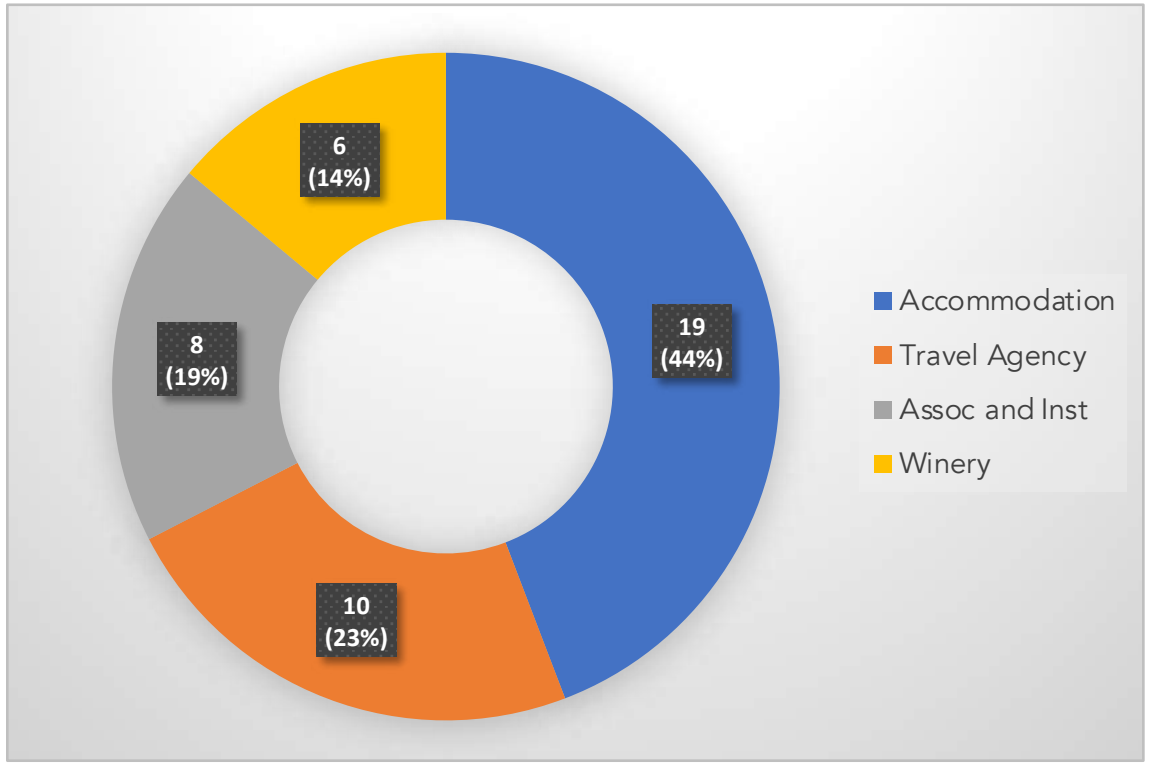
General and methodological information

- ✓ *More than 70 organizations were contacted directly to join the exercise;*
- ✓ *43 structures answered the questionnaire.*

PROFILE OF THE INTERVIEWED ORGANIZATIONS



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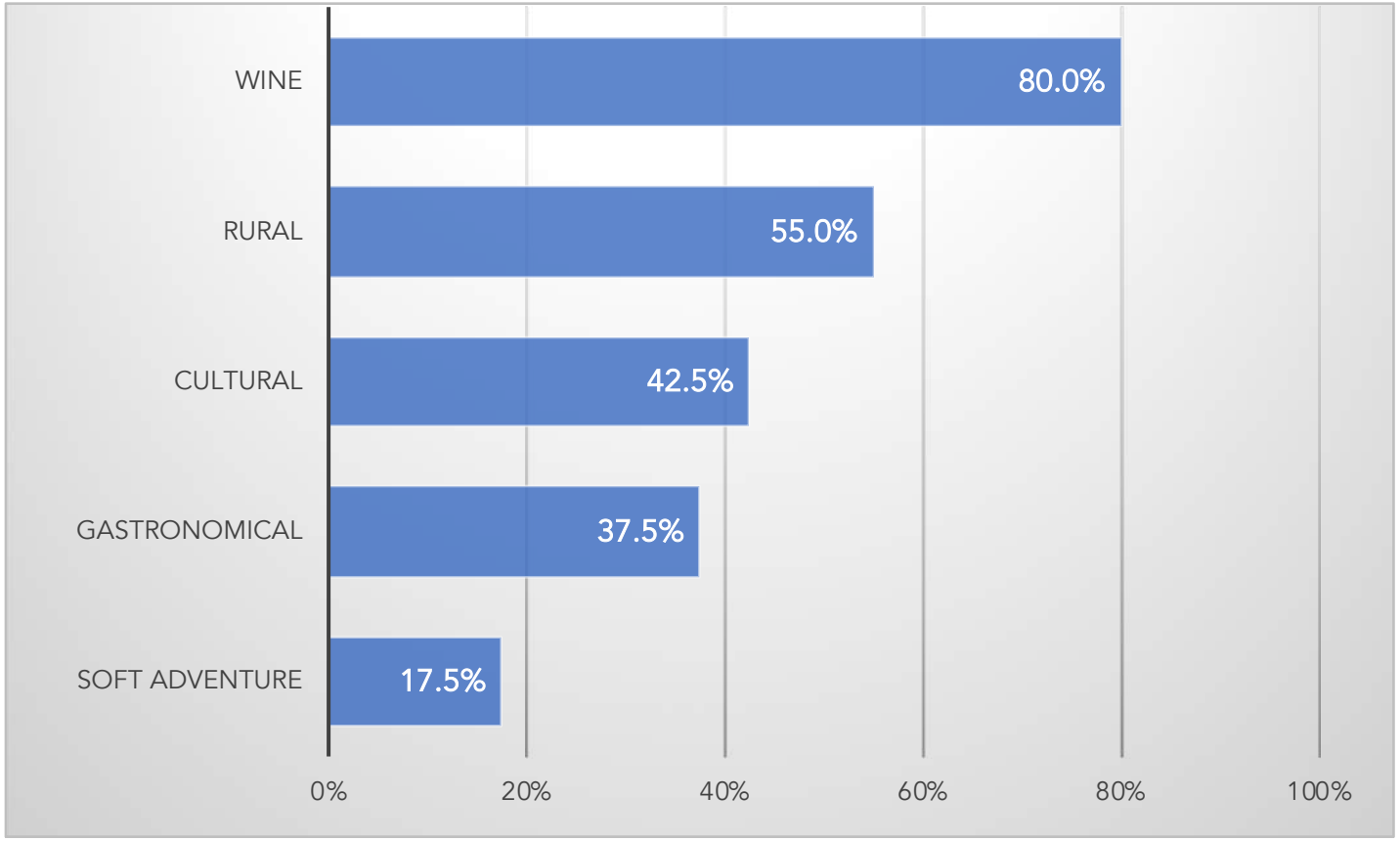
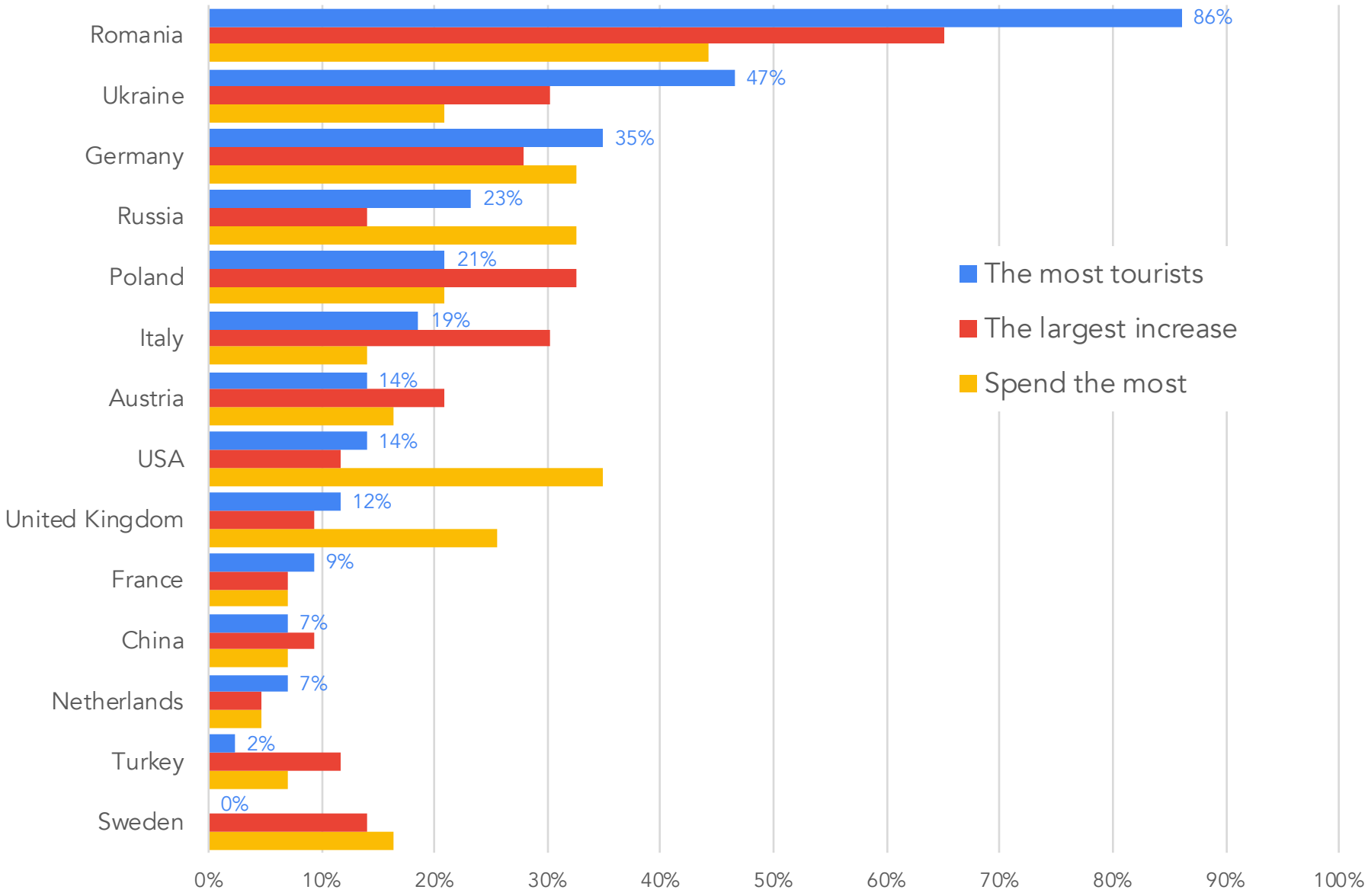
WINE tourism best characterizes Moldova

FORMS OF TOURISM THAT BEST CHARACTERIZE THE REPUBLIC OF MOLDOVA

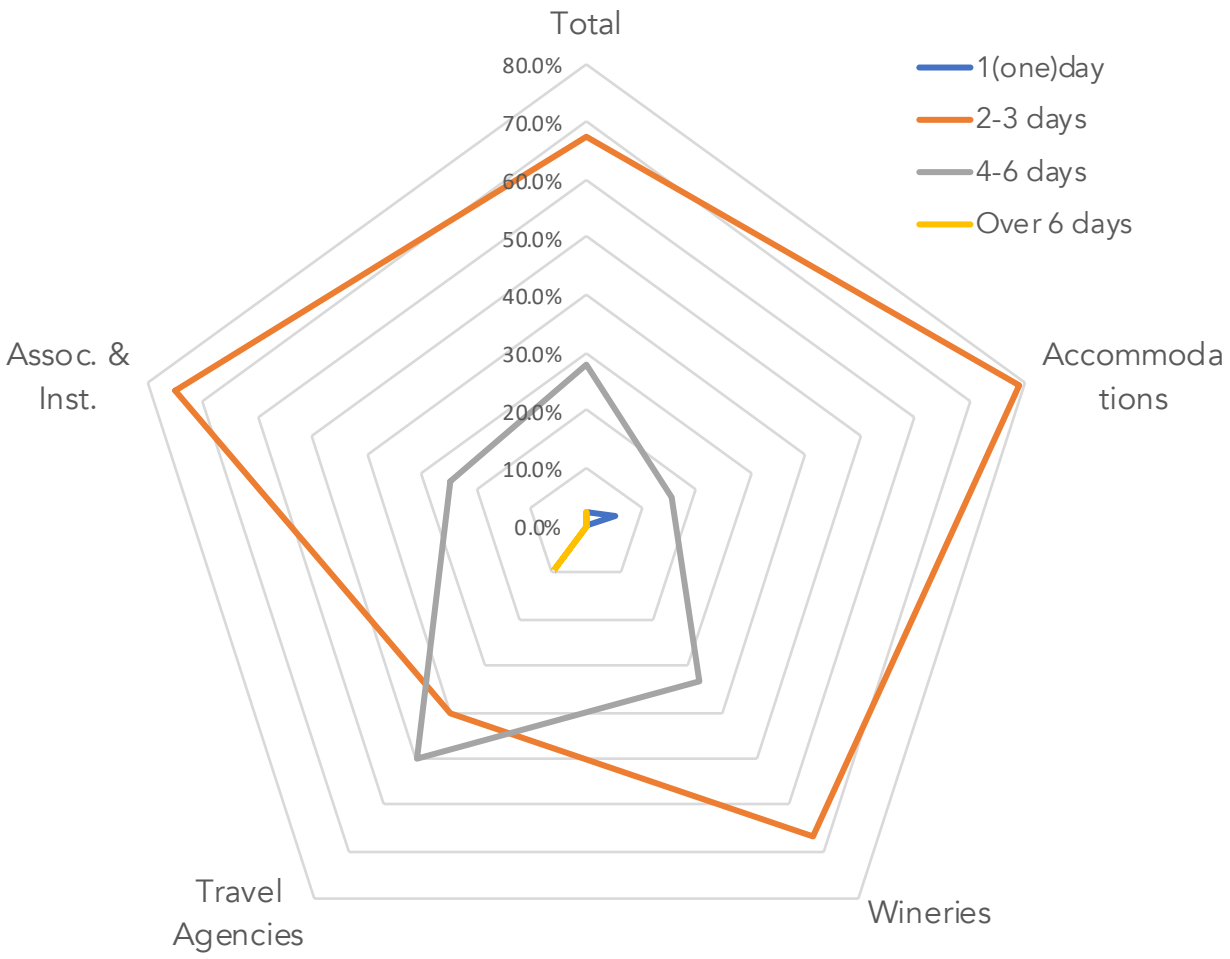


4 out of 5 respondents mentioned wine tourism, and over half mentioned rural tourism

ROMANIA: Reported as Moldova's #1 Source Market



Averge period of stay: too short (2-3 days)



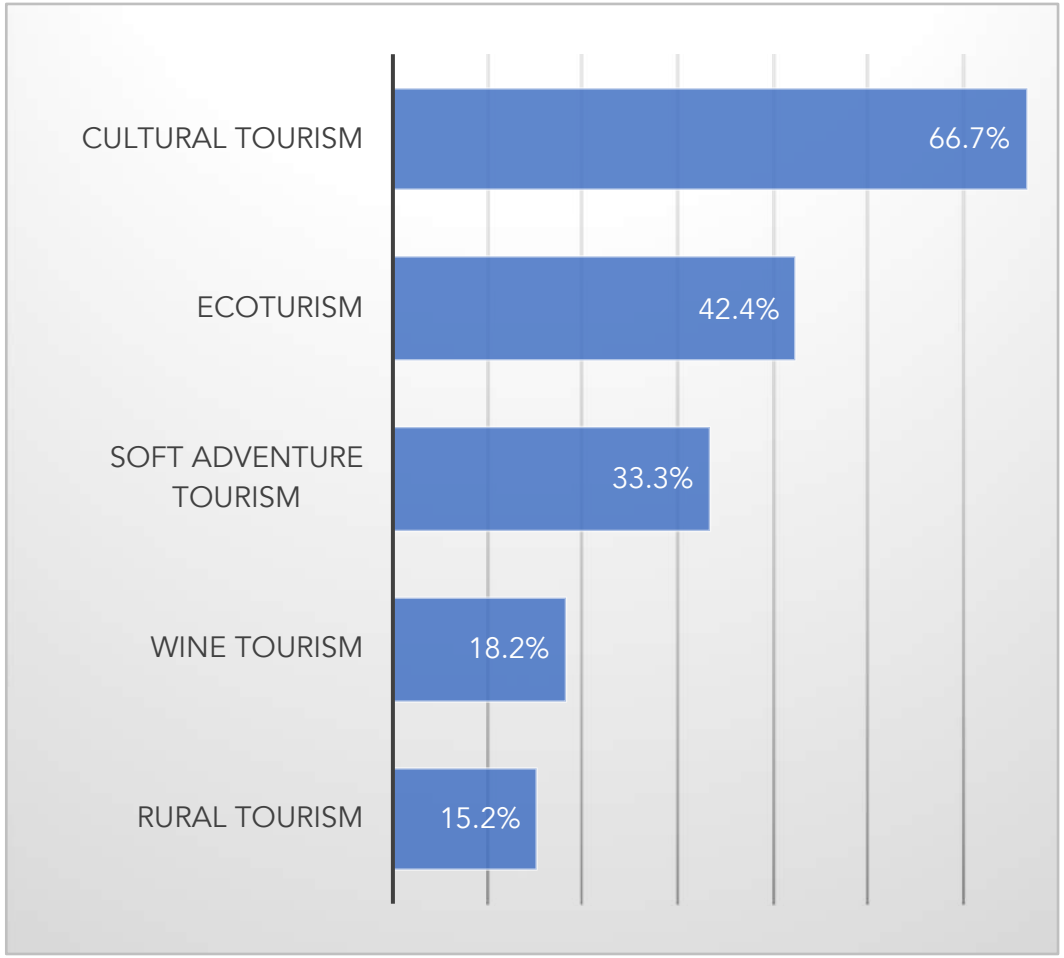
TOP 3 TOURIST ATTRACTIONS VISITED BY FOREIGN TOURISTS

TOURIST ATTRACTIONS	%
Wineries	88.1%
Cricova	71.4%
Milestii Mici	19.0%
Castel Mimi	9.5%
Chateau Vartely	4.8%
Asconi, Purcari	2.4%
Orheiul Vechi	71.4%
Transnistria-Tiraspol	33.3%
Chisinau	9.5%

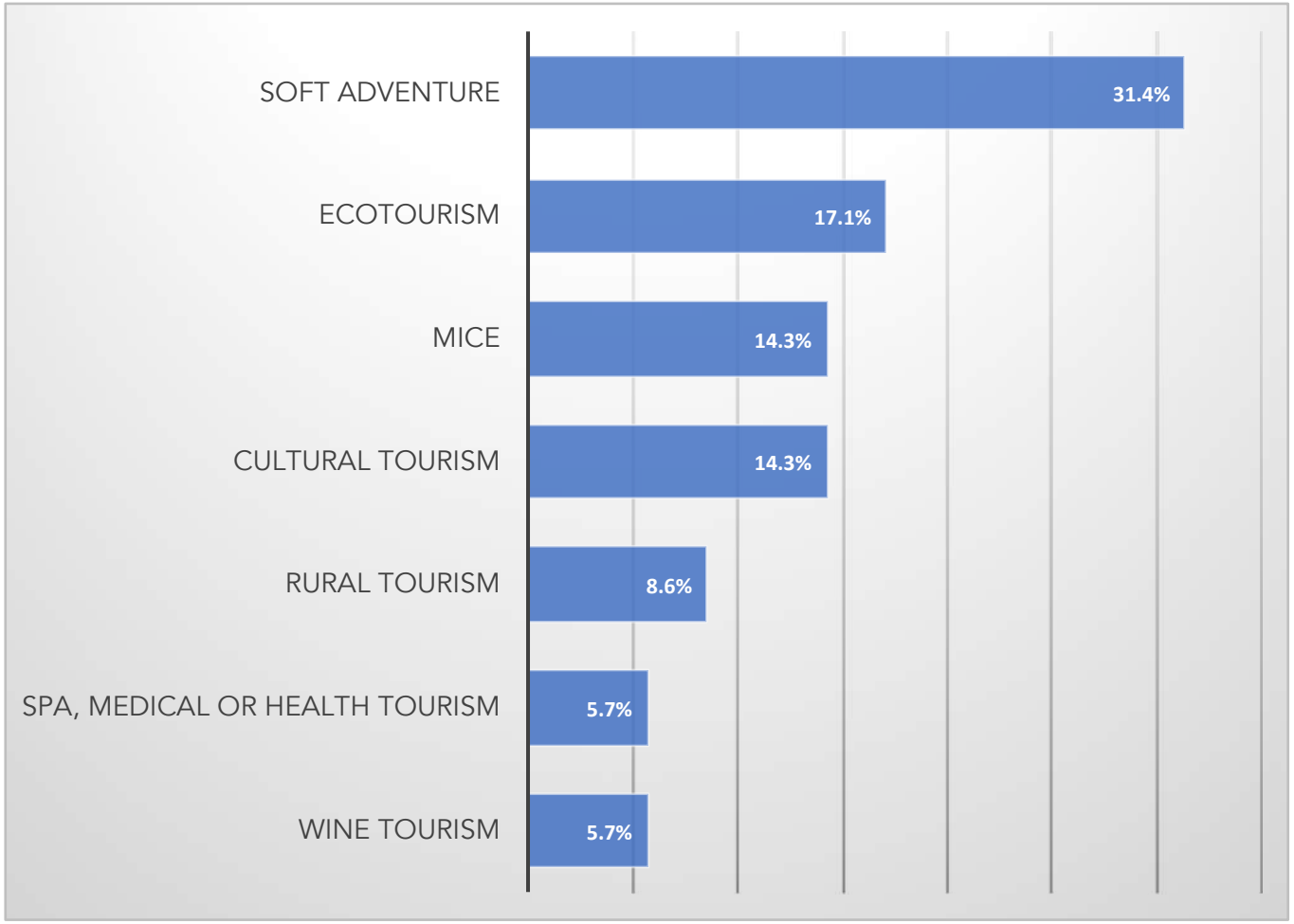
TOURIST ATTRACTIONS	%
Monasteries	19.0%
Tipova	7.1%
Japca, Curchi, Capriana, Veverita	2.4%
Fortresses	14.3%
Soroca	9.5%
Tighina, Bender	2.4%
Museums	4.8%
Natural reservations	4.8%
River Nistru area	2.4%
Kayaking (Nistru river)	2.4%

Plenty of OPPORTUNITIES for DIVERSIFICATION

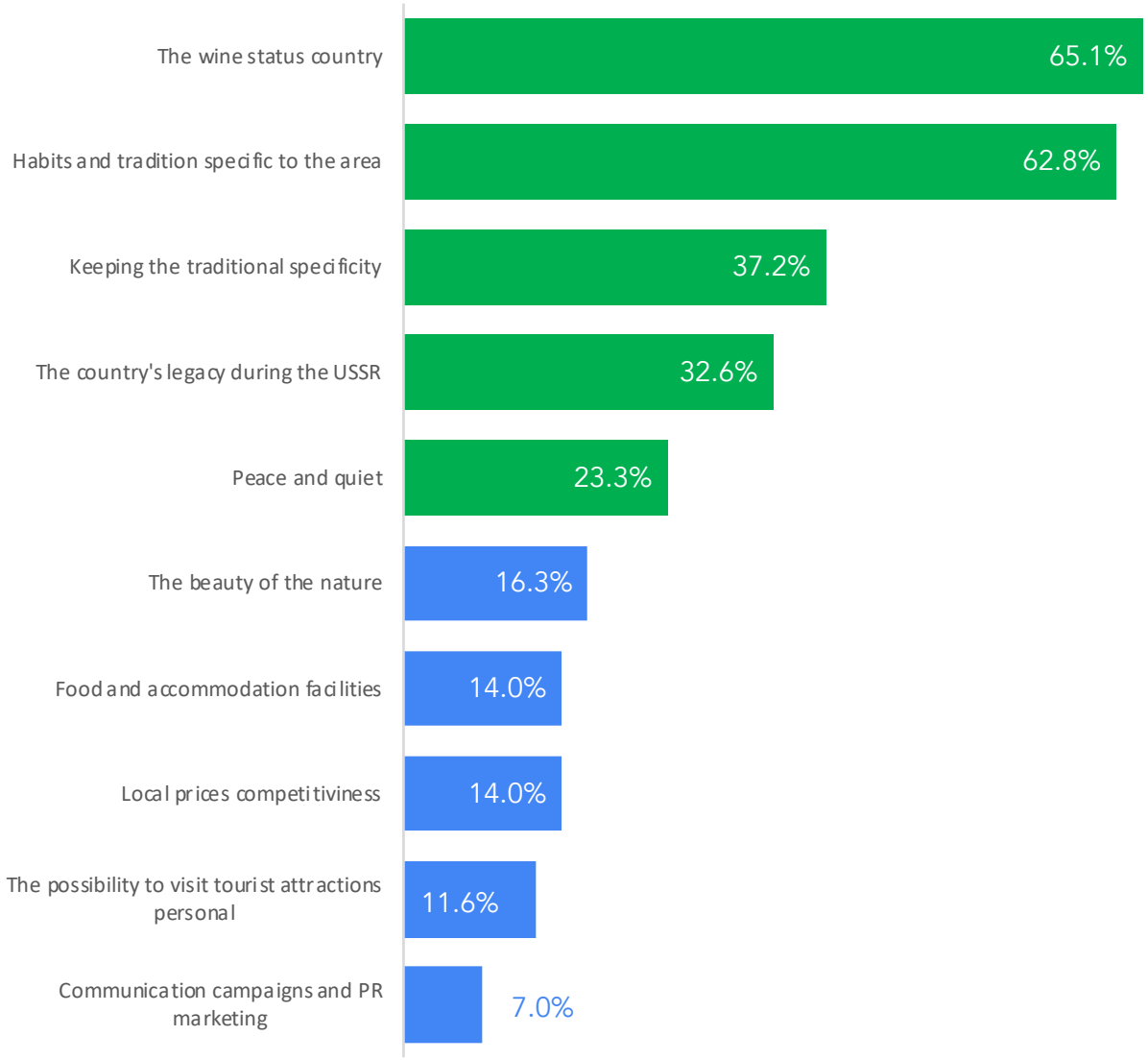
TYPES OF TOURISM NOT SUFFICIENTLY CAPITALIZED

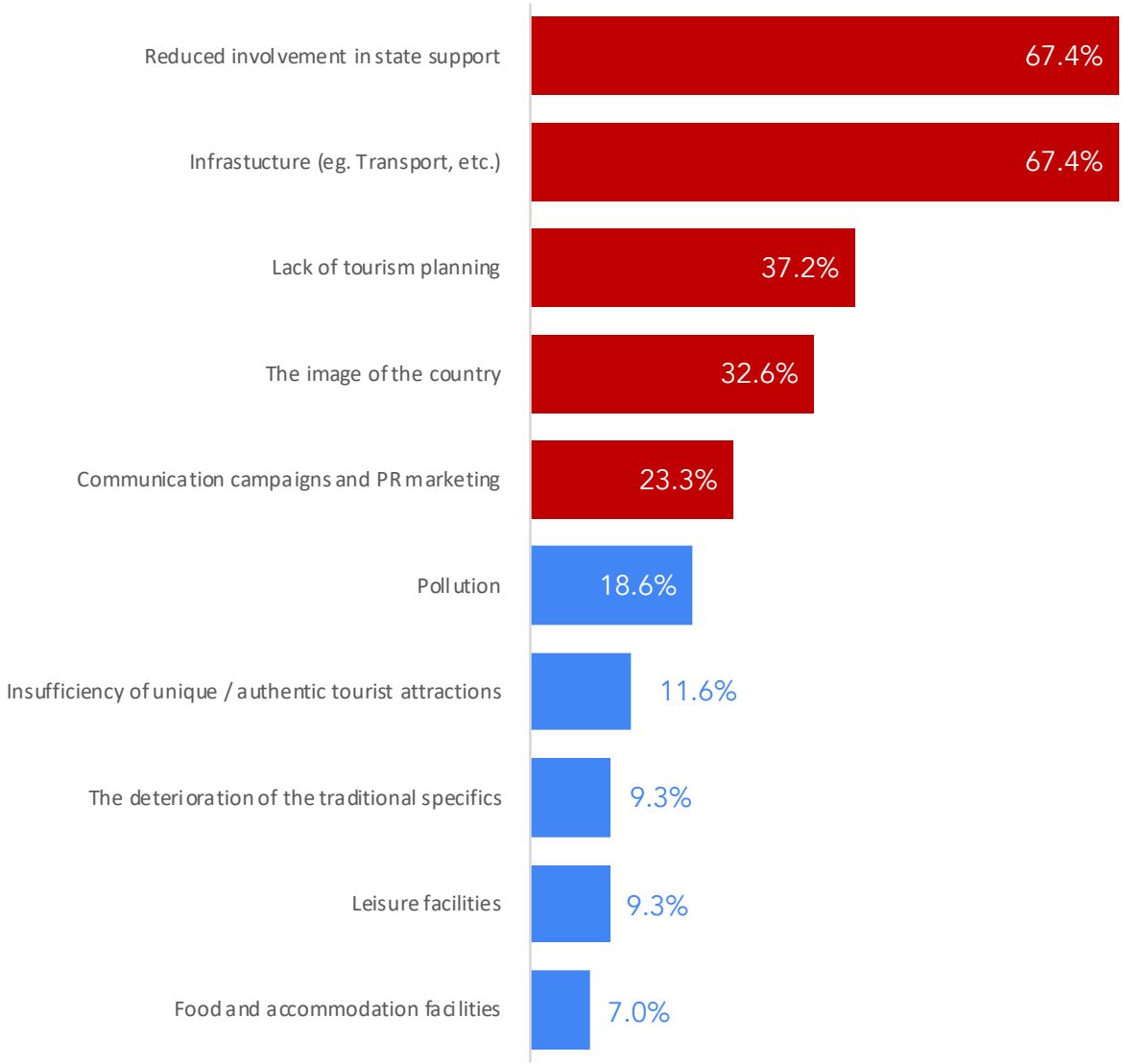


TOURIST OFFERS (PACKAGES) WITH POTENTIAL DEMAND, BUT THE LOCAL INDUSTRY IS NOT YET READY TO OFFER THEM



Strengths & Weaknesses

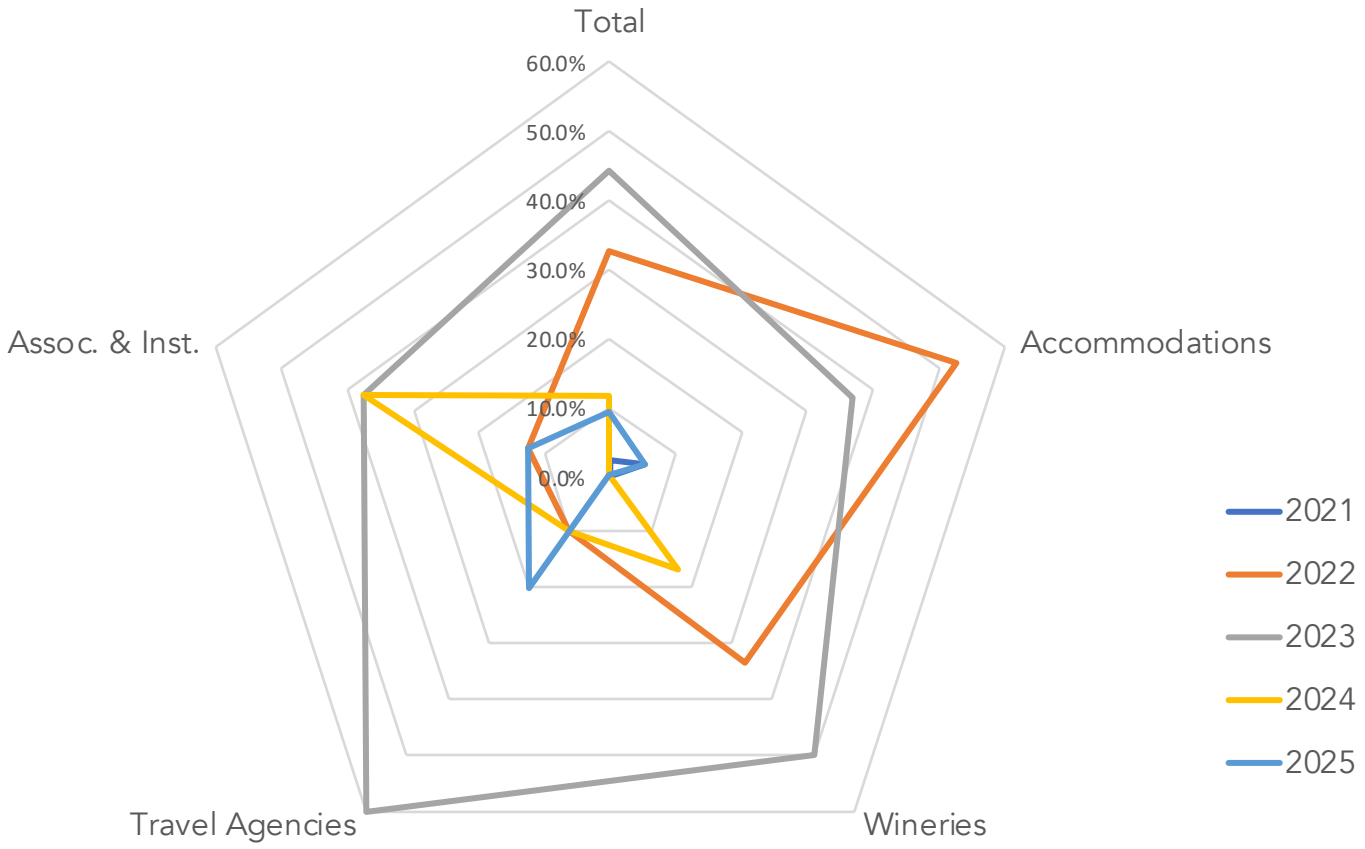




When will tourism return back to normal?

44.2% OF THE SAMPLE EXPECTS A RETURN TO PRE-PANDEMIC LEVELS IN 2023,

WHILE ALMOST 1/3 OF STAKEHOLDERS EMANATE GREATER OPTIMISM AND SEE THE SECTOR RETURN IN 2022.



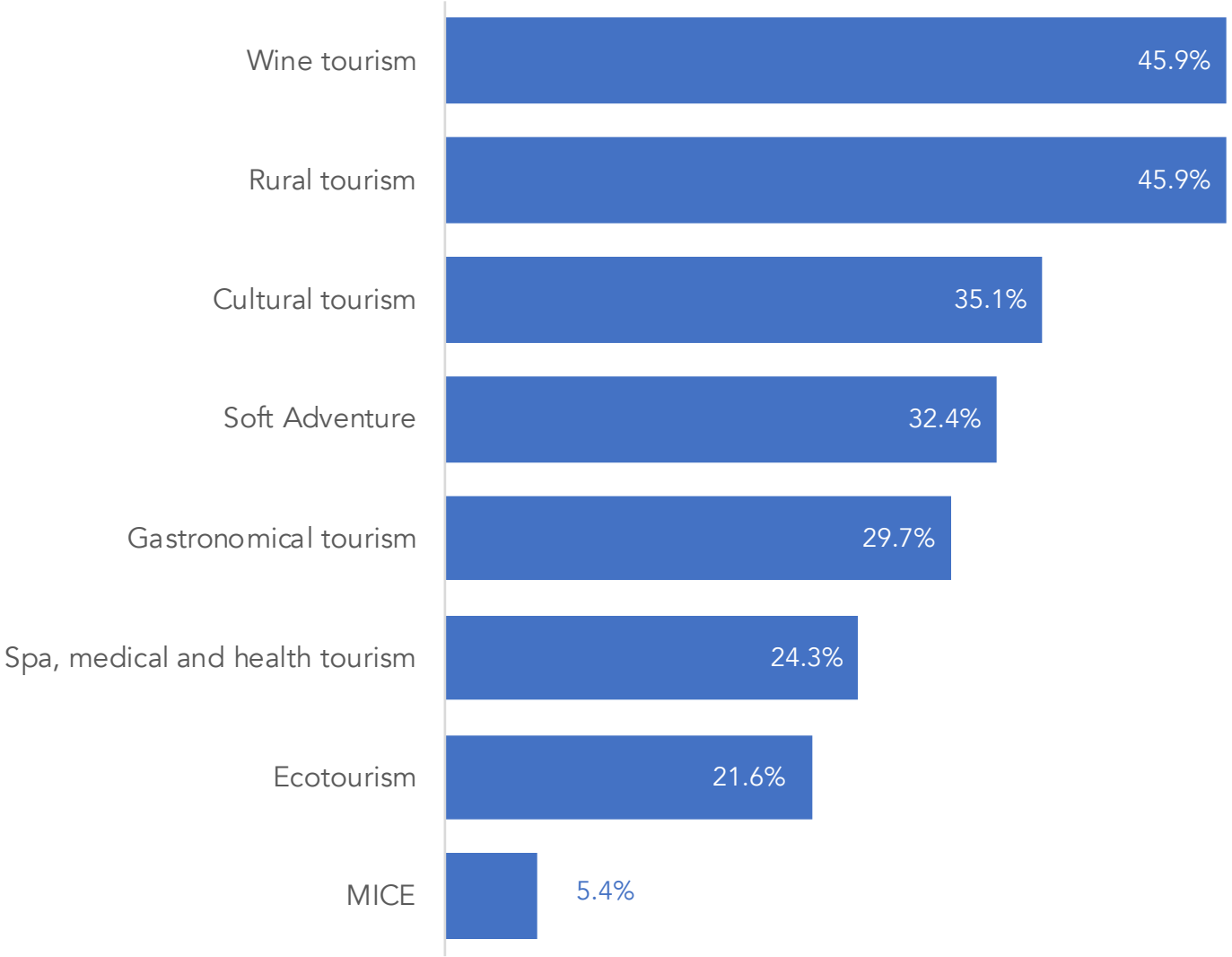
Tourism promotion: TOP PRIORITIES

SOURCE COUNTRIES LOCAL STAKEHOLDERS BELIEVE SHOULD BE PRIORITIZED FOR PROMOTIONAL EFFORTS IN THE NEXT 3-5 YEARS

Source country	Total	Accommodation units	Wineries	Travel agencies & tour operators	Associations and institutions
Romania	60.5%	68.4%	50.0%	60.0%	50.0%
Russian Federation	41.9%	36.8%	66.7%	30.0%	50.0%
Ukraine	37.2%	26.3%	66.7%	50.0%	25.0%
Germany	32.6%	36.8%	16.7%	30.0%	37.5%
Sweden	18.6%	10.5%	33.3%	20.0%	25.0%
Austria	16.3%	10.5%	16.7%	10.0%	37.5%
Italy	14.0%	21.1%	0.0%	10.0%	12.5%
USA	11.6%	5.3%	16.7%	30.0%	0.0%
Poland	11.6%	10.5%	0.0%	0.0%	37.5%
United Kingdom	11.6%	10.5%	0.0%	20.0%	12.5%
Israel	9.3%	21.1%	0.0%	0.0%	0.0%
Netherlands	9.3%	10.5%	16.7%	10.0%	0.0%
China	9.3%	5.3%	16.7%	10.0%	12.5%

NEXT ... A WIDER FOCUS

FORMS OF TOURISM MOLDOVA SHOULD BE FOCUSING ON



Most respondents (45.9%) believe that Moldova should focus on wine and rural tourism.

About 1 out of 3 key tourism stakeholders say that cultural tourism (35.1%), soft adventure tourism (32.4%) and gastronomic tourism (29.7%) are forms of tourism that should not be missing from the offers for foreign tourists.

Section 3) Market Segmentation Research Findings and Conclusions

Survey Distribution Methods

European travelers that had taken a trip in the past two years were surveyed to gather information on behaviors and preferences.

Tactics for distributing the survey included:

- Tour Operator Client Lists
- Consumer Panels
- Wanderlust Members
- Targeted Facebook Ads

A total of 2,098 valid survey responses were collected.

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TABLE 1: SURVEY RESPONSES BY REGIONS

REGIONS	N	%	MoE	POPULATION	%
Northern Europe (UK)	952	45.4%	3%	67,530,172	9.0%
North Central Europe (Poland, Germany)	107	5.1%	9%	121,404,813	16.2%
East/South Central Europe (Romania, Moldova, Russia)	170	8.1%	8%	169,280,076	22.7%
West Central Europe (France, Belgium)	634	30.2%	4%	195,522,410	26.2%
Southern Europe (Italy, Spain)	184	8.8%	7%	107,286,851	14.4%
Other	51	2.4%	14%	86,158,429	11.5%
	2098	**100.0%**	**2%**	**747,182,751**	**100.0%**

Total Respondents

Representative Population

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Capturing Potential Market Share

TABLE 3: TOP 10 VISITED DESTINATIONS IN PAST 2 YEARS		
	DESTINATIONS	%
1	France	14.8%
2	Spain	9.6%
3	United Kingdom	8.0%
4	Italy	7.4%
5	United States of America	4.8%
6	Greece	3.9%
7	Portugal	3.0%
8	Germany	2.4%
9	Canada	1.8%
10	Belgium	1.5%
32	Romania	0.1%
83	Moldova	0.001%

Moldova was ranked 83rd out of 137 named destinations where travelers had been in the past two years.

Based upon total representative survey population of 747 million, this figure is equivalent of over **one million travelers.**

Compared to Moldova's total arrivals of just over 19K in 2019, this figure represents a significant opportunity for Moldova to capture more of the market with **segmentation** and targeted promotional efforts.

SEGMENT 1

Free Spirits

Average Age: 44
Gender: Male
Income: 950 euros per month
Location: East/South Central Europe (Romania, Moldova, Russia)
Family Situation: Single with no kids
Education: High School
Market Size: 33 Million

Professional Role

Percentage Employed: 25%
Type: Trade, manufacturing, agriculture, hospitality

Travel Philosophy Quote:

> "Uninhibited, I am able to embrace spontaneity and make travel one of my life priorities"

Key Characteristics

- Enjoys history and learning about the culture of a place
- Enjoys attending fairs, festivals, shows, and events while vacationing
- Appreciates wine and activities where he can get to know local people

Moldova Perceptions

- Positive perception
- Very likely to visit
- Knows a little about Moldovan culture

Sources of Influence

- Friends and family through direct contact
- Online searches
- Travel review sites

Buying Behavior

- Most likely to book trip independently
- Travels primarily within Europe

SEGMENT 2

Urban Millennials

Average Age: 26

Gender: Female

Income: 2,296 euros per month

Location: Cities within West Central Europe (France, Belgium) and Southern Europe (Italy, Spain)

Family Situation: No kids

Education: University

Market Size: 152 Million

Professional Role

Percentage Employed: 55%

Type: Medicine, law, executive, high-level government

Travel Philosophy Quote:

> "Experiencing places and cultures helps me to live in harmony with the world and return to my roots."

Key Characteristics

- Adventurous spirit and enjoys the outdoors and trying new foods
- Enjoys places with an authentic old European feel
- Wants to feel connected to culture and history

Moldova Perceptions

- Positive perception
- Somewhat likely to visit
- Likely the daughter of recent central Europe immigrant parents and would visit to feel a connection to her roots

Sources of Influence

- Friends and family through direct contact and social media
- Online searches, travel review sites, and online travel articles
- Social media (Instagram) and videos

Buying Behavior

- Books travel independently
- Most influenced by online ads
- Most likely to travel in the summer

SEGMENT 3

Dual Income Family Adventurers

Average Age: 37

Gender: Couple

Income: 2,931 euros per month

Location: Southern Europe (Italy and Spain)

Family Situation: Young kids or teenagers

Education: High school and university educated

Market Size: 114 million

Professional Role

Percentage Employed: 81%

Type: Skilled positions, middle-class

Travel Philosophy Quote:

> "Traveling with our family allows us to spend quality time together while exposing our children to cultures and new experiences."

Key Characteristics

- Most likely have roots nearby, speak Romanian, and nostalgic of soviet culture
- Seeks new educational experiences and cultural activities to engage the whole family
- Enjoys trying new food and wine

Moldova Perceptions

- Positive perception
- Highly likely to visit
- Appreciate its authentic, rustic and rural lifestyle

Sources of Influence

- Friends and family through direct contact and Facebook
- Media including travel articles and videos
- Online searches and travel review sites

Buying Behavior

- Independently and through the help of a tour operator
- Most likely to travel in the summer

SEGMENT 4

Regenerative Travelers

Average Age: 47
Gender: Couple
Income: 2,928 euros per month
Location: North Central Europe (Poland and Germany)
Family Situation: Teenagers or adult children
Education: University
Market Size: 178 million

Professional Role

Percentage Employed: 72%
Type: Executive, upper middle-class

Travel Philosophy Quote:

> "Purposeful travel allows me to return home from a trip in a better place physically, mentally, and spiritually."

Key Characteristics

- Interested in volunteer tourism as a way to their own happiness
- Engages in stimulating and authentic natural and cultural activities
- Seeks to give back and improve the communities where trips take place

Moldova Perceptions

- Positive Perception of Moldova
- Enjoy old Europe in general

Sources of Influence

- Friends and family through direct contact
- Online Searches
- Travel review sites

Buying Behavior

- High spending on vacations
- Tends to choose more exotic destinations
- Independently and through the help of a tour operator

SEGMENT 5

Empty Nest Explorers

Average Age: 63
Gender: Female or Couple
Income: 2,577 euros per month
Location: Northern Europe (UK) and West Central Europe (France, Belgium)
Family Situation: Adult Children
Education: University
Market Size: 160 million

Professional Role

Percentage Employed: 38%
Industry: Retired

Travel Philosophy Quote:

> "At this stage in my life I seek out authentic, off the beaten path destinations where I can spend time exploring."

Key Characteristics

- Visits places rich in history to learn about other cultures
- Enjoys cycling, nature, birdwatching and trying new things
- Likely to travel solo and would interested in volunteer opportunities

Moldova Perceptions

- Finds Moldova appealing and is somewhat likely to visit
- Does not have an ancestral connection to Moldova
- Believes Moldova is authentic and rich in history

Sources of Influence

- Friends and family through direct contact and Facebook
- Searches online and on travel review sites for ideas
- More likely to seek advice of a traditional travel agent

Buying Behavior

- High buying power with longer length of stays
- Travels throughout the year
- Most likely to utilize a tour operator, but also books independently

Segment 6

A sixth segment was also identified among survey respondents. This segment is not recommended as a target market for Moldova and therefore a buyer persona was not identified.

- 33 years old
- Married or separated with kids
- A highly educated, independent married or separated woman who lives in the city or town
- She travels with her kids
- She has a negative perception of Moldova and is not likely to visit Moldova
- She listens to her friends and family recommendations and is not shy to share her own as well
- She most likely lives in Northern Europe (UK) and West Central Europe (France, Belgium)

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Prioritization

- Priorities were determined through a number of factors—including intention to visit, projected demand, and potential spending.
- First, a formula was applied for each to calculate their **potential** by multiplying the following numbers together from each segment:
  - % of those who plan to visit either Europe or Central Europe on their next trip
  - % of those who intend to visit Moldova at some point in the future
  - Average % interest in activities that correspond to those that Moldova has to offer

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Prioritization Score Calculation

Segments	1	2	3	4	5	6	Overall
Proportions	4%	20%	15%	24%	21%	15%	100%
Size of market	33,121,066	152,071,990	114,321,098	178,782,527	160,263,221	108,622,850	747,182,751
Intentions for next trip							
Somewhere in Central Europe	12%	9%	10%	12%	11%	9%	2%
Somewhere in Europe	23%	23%	21%	22%	23%	23%	9%
Total	35%	31%	30%	34%	34%	33%	11%
Intention to visit Moldova	62%	45%	68%	38%	38%	21%	42%
Interest in Activities Offered in Moldova							
Attending local festivals/fairs	7%	8%	7%	6%	7%	7%	7%
Backpacking/ Hiking /Trekking	6%	6%	6%	7%	6%	6%	6%
Bird watching	0%	1%	2%	2%	3%	1%	2%
Camping	2%	3%	4%	2%	1%	3%	3%
Cooking Class	2%	2%	2%	1%	1%	1%	1%
Cultural activities	16%	10%	8%	11%	13%	11%	10%
Getting to know the locals	13%	8%	6%	9%	9%	8%	8%
Visiting historical sites	0%	1%	1%	0%	0%	0%	1%
Visiting Museums	1%	0%	0%	1%	2%	2%	1%
Volunteer Tourism	6%	8%	6%	11%	11%	10%	9%
Walking Tours	2%	1%	1%	1%	0%	1%	1%
Wine tours	1%	2%	2%	1%	1%	1%	1%
Overall Average	5%	4%	4%	4%	5%	4%	4%
Potential Score (Europe as next trip x Moldova intent x activities)	**1.02557%**	**0.56722%**	**0.75814%**	**0.56048%**	**0.591958%**	**0.290575%**	**0.192877%**

Revenue Potential

Segments	1	2	3	4	5	6	Overall
Size of market	33,121,066	152,071,990	114,321,098	178,782,527	160,263,221	108,622,850	747,182,751
Potential score	1.02557%	0.56722%	0.75814%	0.56048%	0.59196%	0.29058%	0.19288%
Projected demand to Moldova (size of market x potential score)	339,680	862,583	866,710	1,002,043	948,690	315,631	1,441,147
% who travel with significant other	44%	32%	42%	45%	61%	41%	44.5%
Projected demand w/ adding significant other	488,290	1,137,279	1,233,710	1,453,806	1,524,096	446,413	2,082,879
Average spending per person	614 €	548 €	571 €	604 €	643 €	539 €	642 €
Projected revenue in Euros	**299,809,870**	**623,229,122**	**704,448,284**	**878,098,864**	**979,993,536**	**240,616,865**	**1,337,208,362 €**

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Revenue Potential with less than 100% market penetration

Penetration of Market	1	2	3	4	5	6	Overall spending in euros
1%	2,998,099	6,232,291	7,044,483	8,780,989	9,799,935	2,406,169	13,372,084
5%	14,990,493	31,161,456	35,222,414	43,904,943	48,999,677	12,030,843	66,860,418
10%	29,980,987	62,322,912	70,444,828	87,809,886	97,999,354	24,061,686	133,720,836

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Section 4) Value Chain and Customer Journey Analysis

Value Chain Map for the Moldova Tourism Industry

Suppliers – indirect economic impacts

Goods and services relating to promotion of destination

Promotional activities, ICT, banking, and insurance

Communications and PR, press and media

Supporting institutions:
Moldova Investment Agency; Moldova State Agency; Ministry of Education, Culture and Research; Ministry of Agriculture, Regional Development and Environment

Trade promotion organizations:
National Inbound Tourism Association of Moldova (ANTRIM)

Energy | Water | Natural environment | Food and beverage | Other materials | Cultural assets

Infrastructure support for the tourism sector

Customs Office	Construction and real estate					Trade companies
Port Authority	Goods and services suppliers: furniture, ICT, food, textiles, furniture, etc.			Site signage	Wellness equipment	Wholesalers
Ministry of Economy and Infrastructure	Consumables	Food and drink production	Manufacturers and cottage industries	Site restoration	Wellness services	Technology shops and imports
Immigration Department	Maintenance	Storage and distribution		Site management	Goods and services for guides	Manufacturers
Cars, bikes, buses, and boats	Back office ICT	Food and drink suppliers	Handicrafts, arts, etc., suppliers	Site maintenance	Brochure production	Fuel/energy suppliers

Direct economic impacts

Travel organisation and booking

In origin and in transit to and from the final destination(s)

Internet | Travel agents

Online travel agents | Airlines

International tour operators

DMCs/inbound tour operators

Transportation	Accommodation	Food and beverage	Creative industries	Tourism assets	Leisure, tours, and excursions	Support services
Car rental companies	Hotels	Bars and restaurants	Handicraft and art shops	Cultural/rural assets: countryside, people, languages, folklore, cooking, handicrafts, traditions	Shows and events	Information centres
Public buses, trains, and trolleybuses	Tourist and agritourist pensions	Wineries	Music and dance		Tourism packages	Grocery shops and retail outlets
Taxi companies	Short-term rentals (Airbnb)	Night clubs	Theatre, artists, performers, etc.	Natural assets: lakes, rivers, protected areas, birds, plants, wildlife	Guided tours	Laundry and cleaning services
Danube cruise boats	Hostels	Fast/street food	Photography and video studios		Visitor attractions	Security and banking services
Informal transportation	Recreation camps	Artisan foods		Built assets: Monasteries, churches, museums, monuments	Day trips and short stays	Internet cafes
Bike and kayak rental companies		Food kiosks and cafes			Wellness and spas	Maintenance services

From country of origin to destination → In and around destination

Key: Supporting institutions and tourism assets | Tourism industry | Tourism value chain business

CHANNELS AND SERVICE PROVIDERS IMPACTING THE TRAVELER'S JOURNEY

DREAMING	PLANNING	BOOKING	EXPERIENCING	SHARING
Social/search advertising	Websites	Tour Operators	Transportation	Social Posts
Email marketing	Online Reviews	Travel Agents	Customs	Online Reviews
YouTube/Video ads	Blogs	Online Travel Agents	Accommodations	Blogs
Television	Organic Searches	Information Centers	Food and Beverage	Word of Mouth
Billboards	Pay per Click Ads	Hotels	Tourism Assets	
Online Display Advertising	Maps		Leisure, Tours and Excursions	
Magazines/Newspapers	Directories		Support Services	
Radio	Travel Apps			
Word of mouth	"Near me" GPS			

Value Chain Strengths

- World-class cultural and natural resources
- A thriving food and wine scene
- Recent rehabilitations of the country's railway and road network (including the modernization of trains and the Ungheni-Chișinău-Odessa highway project that will connect Moldova with some of the most important roads in Europe)
- High-quality rental car options for independent travelers
- Good air connectivity (modernized airport with regularly weekly connections with 17 countries)

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Value Chain Weaknesses

- Low prioritization of the tourism sector at the National Level
- Lack of a dedicated Destination Management Organization
- Ineffective promotion of Moldova in source markets with most promotional budgets targeting the business/professional segment
- Barriers to establishing small tourism businesses in rural areas including complex legal requirements and lack of skilled tourism workforce
- Lack of diversified products to attract visitors, extend length of stay, and combat seasonality
- Underutilization of protected areas for tourism with a need for more tourist services
- Poor road infrastructure
- Lack of developed circuits in the north and south
- Lack of tourism businesses adopting technology in their business functions
- Few international tour operators selling the country
- Limitations on growth of MICE Market due to lack of conference accommodation options for groups over 250 people and segmentation of service providers

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Value Chain for the Moldova Tourism Industry

KEY SERVICE PROVIDERS	• International tour operators • Online travel agencies • Inbound tour operators • Travel agents • Travel websites • Guidebooks and collateral • Social media • Friends and family	• Air • Road • Train • Boat	• Taxi • Public bus • Rental car • Hired car with driver • Coach/minibus • Train	• Hotels • Guesthouses • Airbnb rentals • Homestays	• Bars and restaurants • Wineries • Coffee shops • Distilleries • Night clubs • Grocery stores • Artisan food producers	• Tourist and agritourist pensions • Vineyards • Local people (through sharing languages, folklore, cooking, handicrafts, and traditions) • Tour guides	• Festivals • Soft adventure operators • Tour guides • Protected areas • Monasteries • Churches • Museums • Monuments	• Tripadvisor (reviews) • Social media • Travelers (word of mouth)
VALUE CHAIN	TRAVEL PLANNING/ BOOKING	ARRIVAL	LOCAL TRANSPORTATION	ACCOMMODATION	FOOD AND BEVERAGE	RURAL/CULTURAL TOURISM ACTIVITIES	LEISURE ACTIVITIES/ ENTERTAINMENT	DEPARTURE
STATUS	• Limited number of local tourism companies that design and sell tours • 19,800 travelers utilized a local tour operator or travel agent in 2019 • Ineffective promotion of Moldova to source markets • Not well sold by international tour operators. Those that offer Moldova combine a few days as part of a multi-country itinerary	• Moldova shares a border with two countries (Romania with 6 access points and Ukraine with 16 access points) • 4.48 million border crossings in 2019 primarily from Romania, Ukraine, and Russia (most of which are not for leisure purposes) • Regular weekly connections by air to 17 countries • Highest volume of air arrivals from Russia, Turkey, and Italy • Danube cruises bring approximately 1,000 passengers per year	• Public transportation options include buses, trains, and trolleybuses • Rental car services include the offerings of international companies • An increasing number of independent guides can be hired as drivers • Only a small number companies offering bikes and kayak rentals	• Moldova ranks 124th out of 140 in terms of the number of hotel rooms per population • There are only 3 international brand hotels: Radisson Blu, Best Western and Marriott Courtyard, all in Chișinău • More than 300 options listed on Airbnb in the country, most in Chișinău • A limited number of accommodation possibilities are offered at larger wineries and are considered to be luxury	• Moldova is well known as a destination with diverse, colorful, authentic, and high-quality cuisine • Moldova has a well-established wine industry, with the largest collection in the world (Mileștii Mici). Cricova winery boasts an extensive network of underground tunnels that stretch for 120 km • In the countryside (in rural pensions and guest houses), local housewives will typically serve traditional food	• The culturally fascinating autonomous region Gagauzia in the south has its own language, currency, traditions and cuisine • Other popular cultural attractions in the countryside include Soroca Fortress (a two-hour drive from Chișinău) and Manuc Bei Mansion in the Hincesti District • While vineyards dot the countryside, most have not be developed for outdoor/rural tourism activities • Transnistria is a very popular day trip to go "back to the USSR"	• Moldova has beautiful landscapes and protected natural areas • The nature reserve Codrii is the most visited natural attraction in Moldova • While they have tremendous potential for soft adventure tourism, protected areas in general are undiscovered and underutilized from a tourism point of view • A number of festivals are held each year in Moldova, including Wine Festival, Chisinau Jazz Festival, Christmas Markets in Chișinău, IA MANIA	• Online reviews on Tripadviser of attractions are very positive • Tripadvisor reviews of accommodations are mixed, with issues including they are largely outdated, not properly cleaned, and have poor quality services/food
CONSTRAINTS TO GROWTH	• Very few tourists are currently selecting Moldova as a destination • Lack of coordinated destination management and marketing organizaion and national tourism portal to provide information • Many international tour operators have a negative perception of tourism product	• Seasonality is a factor with the majority of visitors arriving between April and October • Flights are relatively expensive to Moldova compared to other regional destinations	• Public transportation in Moldova is challenging to navigate • Lack of road signs at tourism destinations • Poor road infrastructure	• Limited higher-end options • There are no registered rural accommodation structures in the north and northeast of the country, where there is a relatively high density of natural and historical attractions • In the south, just a few guesthouses can be found in Gagauzia and in the Cahul region	• Majority of restaurants are concentrated in Chișinău • The agritourism offer is limited despite a variety of local wine products, organic food, and traditional agricultural techniques • Misalignment between what education organizations produce for hospitality training and the needs of the industry	• While tremendous natural and cultural resources exist, they are underutilized with a resulting lack of products available for travelers • Barriers to entry for developing rural tourism enterprises, such as complex legal requirements and lack of financial products for the tourism sector • Lack of trained tour guides with English language skills • Lack of established tourism routes in the north and south that connect products together	• Festivals are primarily promoted to a domestic audience and not internationally • Lack of visitor services within national parks • Lack of additional tourism products to appear to the visitors' need for entertainment, activities, and shopping	• Lack of social media presence of some businesses for travelers to engage with upon return

Section 5: Recommended Interventions

Top Three Recommended Target Segments

TARGET SEGMENT 1

Dual Income Family Adventurers

Average Age: 37
Gender: Couple
Income: 2,931 euros per month
Location: Southern Europe (Italy and Spain)

Family Situation: Young kids or teenagers
Education: High school and university educated
Market Size: 114 million

Professional Role

Percentage Employed: 81%
Type: Skilled positions, middle-class

Travel Philosophy Quote:

> "Traveling with our family allows us to spend quality time together while exposing our children to cultures and new experiences."

Key Characteristics

- Most likely have roots nearby, speak Romanian, and nostalgic of soviet culture
- Seeks new educational experiences and cultural activities to engage the whole family
- Enjoys trying new food and wine

Moldova Perceptions

- Positive perception
- Highly likely to visit
- Appreciate its authentic, rustic and rural lifestyle

Sources of Influence

- Friends and family through direct contact and Facebook
- Media including travel articles and videos
- Online searches and travel review sites

Buying Behavior

- Independently and through the help of a tour operator
- Most likely to travel in the summer

TARGET SEGMENT 2

Regenerative Travelers

Average Age: 47
Gender: Couple
Income: 2,928 euros per month
Location: North Central Europe (Poland and Germany)

Family Situation: Teenagers or adult children
Education: University
Market Size: 178 million

Professional Role

Percentage Employed: 72%
Type: Executive, upper middle-class

Travel Philosophy Quote:

> "Purposeful travel allows me to return home from a trip in a better place physically, mentally, and spiritually."

Key Characteristics

- Interested in volunteer tourism as a way to their own happiness
- Engages in stimulating and authentic natural and cultural activities
- Seeks to give back and improve the communities where trips take place

Moldova Perceptions

- Positive Perception of Moldova
- Enjoy old Europe in general

Sources of Influence

- Friends and family through direct contact
- Online Searches
- Travel review sites• Friends and family through direct contact
- Online Searches
- Travel review sitesa

Buying Behavior

- Friends and family through direct contact
- Online Searches
- Travel review sites

TARGET SEGMENT 3

Empty Nest Explorers

Average Age: 63
Gender: Female or Couple
Income: 2,577 euros per month
Location: Northern Europe (UK) and West Central Europe (France, Belgium)

Family Situation: Adult Children
Education: University
Market Size: 160 million

Professional Role

Percentage Employed: 38%
Industry: Retired

Travel Philosophy Quote:

> "At this stage in my life I seek out authentic, off the beaten path destinations where I can spend time exploring."

Key Characteristics

- Visits places rich in history to learn about other cultures
- Enjoys cycling, nature, birdwatching and trying new things
- Likely to travel solo and would interested in volunteer opportunities

Moldova Perceptions

- Finds Moldova appealing and is somewhat likely to visit
- Does not have an ancestral connection to Moldova
- Believes Moldova is authentic and rich in history

Sources of Influence

- Friends and family through direct contact and Facebook
- Searches online and on travel review sites for ideas
- More likely to seek advice of a traditional travel agent

Buying Behavior

- High buying power with longer length of stays
- Travels throughout the year
- Most likely to utilize a tour operator, but also books independently

FRAMEWORK

Goal: Attract More Demand for Tourism to Moldova

Strategic Segments →

Target Segment 1	Target Segment 2	Target Segment 3
Intervention 1.1	Intervention 2.1	Intervention 3.1
Intervention 1.2	Intervention 2.2	Intervention 3.2
Intervention 1.3	Intervention 2.3	Intervention 3.3
Intervention 1.4	Intervention 2.4	Intervention 3.4
Intervention 1.5	Intervention 2.5	Intervention 3.5
Intervention 1.6	Intervention 2.6	Intervention 3.6

Objective 1: Diversify Tourism Product Offering

Objective 2: Improve Human Resource Capacity with Public and Private Sectors

Objective 3: Enhance Marketing and Branding

Objective 4: Improve Access and Infrastructure

Foundational Cross-Cutting Interventions for Prioritizing Tourism at the National Level

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FRAMEWORK

Goal: Attract More Demand for Tourism to Moldova

Target Segment 1

Target Segment 2

Target Segment 3

Cross-Cutting Interventions

Objective 1

Intervention 1.1

- Key Actions
- Key Actions
- Key Actions
- Key Actions

1 Year Implementation Plan

Updated annually

Action	Responsible	Timeline	Cost/ Resources

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Strategic Objectives for each Target Segment

1) Diversify Tourism Product Offering

2) Develop Human Resource Capacity within Public and Private Sectors

3) Enhance Branding and Marketing

4) Improve Access and Infrastructure

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Target Segment 1: Dual Income Family Adventurers

Strategic Objective 1: Diversify Tourism Product Offering

Strategic Interventions

1.1) Develop Family-Friendly Tourism Products

1.2) Develop Tourism Circuits in the North and South

1.3) Develop and Market Family-Friendly Events and Festivals

Target Segment 1: Dual Income Family Adventurers

Strategic Objective 2: Improve Human Resource Capacity with Public and Private Sectors

Strategic Interventions

1.4) Provide Private Sector Training for Adopting Technology into Business Functions

1.5) Develop Private Sector Specialist Training Program for Delivering Family Travel Programs to Tour Operators and Guides

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Target Segment 1: Dual Income Family Adventurers

Strategic Objective 3: Enhance Branding and Marketing

Strategic Interventions

1.6) Develop Marketing Campaigns Targeted to Dual Income Family Adventurers

1.7) Organize FAM Trips to Introduce Moldova as a Family-Friendly Destination

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Target Segment 1: Dual Income Family Adventurers

Strategic Objective 4: Improve Access and Infrastructure

Strategic Interventions

1.8) Improve Road Signage for Independent Travelers

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Target Segment 2: Regenerative Travelers

Strategic Objective 1: Diversify Tourism Product Offering

Strategic Interventions

2.1) Develop Spa and Wellness Tourism Products

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Target Segment 2: Regenerative Travelers

Strategic Objective 2: Improve Human Resource Capacity with Public and Private Sectors

Strategic Interventions

2.2) Develop Private Sector Specialist Training Program for Delivering Family Travel Programs to Tour Operators and Guides

2.3) Invest in Community Building and Developing their Capacity to Improve Resident Well-Being

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Target Segment 2: Regenerative Travelers

Strategic Objective 3: Enhance Branding and Marketing

Strategic Interventions

2.4) Develop Sustainable Tourism Criteria and Certification Program

2.5) Develop Marketing Campaigns Targeted to Regenerative Traveler

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Target Segment 2: Regenerative Travelers

Strategic Objective 4: Improve Access and Infrastructure

Strategic Interventions

2.6) Develop Inclusivity Program for Ethnic Groups

2.7) Develop Natural and Cultural Resources for Tourism in a Way that Produces Net Gains in Biodiversity and Historical Preservation

Target Segment 3: Empty Nest Explorers

Strategic Objective 1: Diversify Tourism Product Offering

Strategic Interventions

3.1) Develop Soft Adventure Tourism Products

3.2) Develop Tourism Products Based Upon Intangible Cultural Heritage

3.3) Develop Winter Products to Combat Seasonality Issues

Target Segment 3: Empty Nest Explorers

Strategic Objective 2: Improve Human Resource Capacity with Public and Private Sectors

Strategic Interventions

3.4) Develop Private Sector Specialist Training Program for Delivering Empty Nest Explorer Travel Programs to Tour Operators and Guides

Target Segment 3: Empty Nest Explorers

Strategic Objective 3: Enhance Branding and Marketing

Strategic Interventions

3.5) Develop Marketing Campaigns Targeted to Empty Nest Explorers

3.6) Organize FAM Trips to Introduce Moldova as an Empty-Nest Explorer Destination

Target Segment 3: Empty Nest Explorers

Strategic Objective 4: Improve Access and Infrastructure

Strategic Interventions

3.6) Develop Industry-Wide Quality and Safety Standards

Cross-Cutting

Strategic Interventions

4.1) Establish a National Public Private Partnership Marketing Organization (i.e. Tourism Board)

4.2) Develop a “Tourism Cabinet Committee” to Facilitate Intra-Governmental Tourism Coordination

4.3) Increase Public-Private Sector Communication and Coordination

4.4) Develop a National Tourism Strategy with an Emphasis on COVID-Recovery

4.5) Develop a National Tourism Marketing Strategy and National Tourism Portal for Moldova

Cross-Cutting

Strategic Interventions

4.6) Establish a Tourism Innovation Fund to assist Moldovan entrepreneurs, businesses, communities and NGOs develop new visitor experiences

4.7) Align National Educational Curricula for Tourism and Hospitality with Industry Needs

4.8) Establish B2B Market Linkages for “Export Ready” Tour Operators and Events

4.9) Develop Tourist Services in Natural Protected Areas

4.10) Support Rural Community Development

4.11) Create a Credit Facility to Enhance Access to Credit for Small Businesses and Entrepreneurs Interested in Developing or Enhancing Visitor Experiences

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