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ALTERNATIVE TOURISM IN EUROPEAN UNION COUNTRIES: MARKET GROWTH, SEGMENT DIVERSIFICATION AND DEVELOPMENT PROSPECTS*

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Abstract. The diversification of contemporary tourism has transformed alternative tourism into an increasingly important component of the European tourism economy. However, it remains conceptually fragmented and lacks a unified framework integrating its diverse market segments. This study aims to conceptualize alternative tourism as an integrated system of interconnected tourism markets and to examine its development in the European Union through empirical evidence from multiple measurable tourism segments. The research adopts a mixed conceptual–empirical approach combining systems theory, literature analysis, and secondary data analysis. A conceptual framework is developed to explain the relationships among tourist motivations, destination resources, alternative tourism market segments, and sustainability outcomes. The empirical analysis draws on official statistics and institutional datasets from Eurostat, the Global Wellness Institute, ISTAT, Metsähallitus, and other authoritative sources. Six market segments are examined: wellness tourism, spa and thermal tourism, platform-based accommodation, agritourism, nature-based tourism, and pilgrimage tourism. The findings reveal consistent long-term growth across all analysed segments, driven by increasing demand for health, authenticity, sustainability, nature-based experiences, spirituality, and personal development. The study demonstrates that alternative tourism should be understood as an integrated and measurable tourism ecosystem rather than a collection of isolated tourism forms. The proposed framework contributes to tourism theory and provides a methodological basis for future empirical research on alternative tourism.

Keywords: alternative tourism; tourism diversification; wellness tourism; sustainable tourism; pilgrimage tourism; nature-based tourism; agritourism; European Union (EU).

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1. Introduction

In recent decades, the tourism industry in the European Union (EU) has been undergoing a gradual transformation from standardized mass tourism toward more individualized, experience-oriented and sustainable forms of travel (But, 2024; European Travel Commission, 2025; Karanikić et al., 2026). This transformation reflects broader changes in tourist motivations, including the growing demand for well-being, authenticity, contact with nature, cultural immersion, spiritual experience and personal development. In this

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context, non-traditional and alternative tourism has become an increasingly important direction of tourism market development, as it responds to the limitations of mass tourism and promotes a more balanced relationship between economic, environmental and socio-cultural dimensions of development (UN Tourism, n.d.; Weaver, 2006; Global Wellness Institute, 2026). From a theoretical perspective, alternative tourism can also be understood as a complex interdisciplinary system that includes tourists, destinations, host communities, infrastructure and socio-cultural interactions (Cohen, 1984; Smith, 1989; Jafari, 2001; Bertalanffy, 1968/2015).

At the same time, the market of alternative tourism is difficult to measure as a single statistical category. Eurostat does not distinguish “alternative tourism” as an independent market segment; therefore, its development should be assessed through a basket of measurable indicators, including wellness tourism, spa and thermal tourism, platform-based short-stay accommodation, rural tourism and agritourism, nature-based and ecological tourism, cycling and adventure tourism, pilgrimage and spiritual tourism, as well as emerging digital and virtual forms of tourism (European Parliamentary Research Service, 2023; CBI, 2024a, 2024b; Global Wellness Institute, 2025; Eurostat, 2026a, 2026b). This means that the expansion of alternative tourism in the EU cannot be captured by one official category, but can be demonstrated through several interconnected tourism segments.

The relevance of this topic is confirmed by the positive dynamics of several alternative tourism segments in EU countries. Platform-based short-stay accommodation represents one of the strongest measurable indicators: guest nights booked through major online platforms in the EU reached 951.6 million in 2025 and continued to grow in the first quarter of 2026 (Eurostat, 2026a, 2026b). Wellness tourism in Europe also exceeded its pre-pandemic level, while spa tourism and thermal/mineral spring tourism demonstrated growth in both revenues and infrastructure (Global Wellness Institute, 2025). Furthermore, rural tourism and agritourism show measurable development through the share of tourism nights in rural areas and the growth of agritourism farms in Italy (European Parliamentary Research Service, 2023; ISTAT, 2018, 2025). Nature-based and ecological tourism is supported by the growing importance of national parks and protected areas, as illustrated by visitation and local economic impact indicators in Finland (Metsähallitus, 2025a, 2025b).

The development of alternative tourism is also visible at the level of individual EU countries. Germany demonstrates growth in wellness, thermal, platform-based and adventure tourism; France combines wellness tourism, pilgrimage, sacred heritage and platform accommodation; Italy shows strong dynamics in wellness tourism, agritourism, thermal tourism and Jubilee-related pilgrimage; Spain combines wellness tourism, Camino routes, ecotourism, medical tourism and platform accommodation (Global Wellness Institute, 2025; ISTAT, 2025; Eurostat, 2026b; Cathedral of Santiago de Compostela, 2026; Vatican News, 2026). These country-level examples show that alternative tourism is not a marginal niche, but a diversified market formed by different national specializations and regional tourism resources.

Particular attention should also be paid to pilgrimage, spiritual and sacred tourism, since these forms increasingly intersect with cultural heritage, slow mobility, wellness practices and local economic development. The recovery and growth of major European pilgrimage destinations and routes, including Fátima, Lourdes, Camino de Santiago, Jasna Góra and the Rome Jubilee, indicate that spiritual and sacred tourism remains an important part of the alternative tourism market in Europe (Sanctuary of Lourdes, 2024; Dzieje.pl, 2026; Shrine of Fátima, 2026; Cathedral of Santiago de Compostela, 2026; Vatican News, 2026). These examples demonstrate the increasing hybridity of alternative tourism, where religious, cultural, restorative and experiential motives are often combined within one tourism product.

From a theoretical perspective, the study of alternative tourism remains conceptually important because its boundaries are not always clearly defined. Existing literature points to methodological difficulties in defining and classifying alternative tourism forms, especially where wellness, retreat, sacred, spiritual and transformational tourism overlap (Kelly, 2010; Korstanje, 2012; Smith & Puczkó, 2014; Buckley, 2023). This ambiguity creates a need for a clearer market-oriented analysis that does not reduce alternative tourism to one type of activity, but examines it as a diversified system of tourism practices connected with sustainability, well-being, nature, culture, spirituality and new consumption patterns.

Therefore, the aim of this article is to analyse the market development of alternative forms of tourism in European Union countries and to identify the main measurable segments through which this market expansion can be assessed. The article focuses on evidence of market growth across wellness, spa and thermal, rural, nature-based, adventure, platform-based, pilgrimage and spiritual tourism. By combining conceptual analysis with statistical and country-level indicators, the study contributes to a more systematic understanding of alternative tourism as a diversified and economically significant component of the contemporary EU tourism industry.

2. Literature review

2.1. Theoretical foundations of alternative tourism

The concept of alternative tourism emerged as a response to the growing recognition that conventional mass tourism, while generating substantial economic benefits, also produces significant environmental, socio-cultural and spatial pressures. Rather than representing a single tourism product, alternative tourism has gradually evolved into a multidimensional concept encompassing diverse forms of travel that emphasize sustainability, authenticity, local participation, environmental responsibility and meaningful visitor experiences. Its theoretical foundations draw upon several academic traditions, including sociology, anthropology, systems theory, sustainability studies and tourism management. Collectively, these perspectives demonstrate that tourism should not be interpreted solely as an economic activity but as a complex socio-economic system characterized by interactions among tourists, host communities, destinations, institutions and natural environments (Cohen, 1984; Smith, 1989; Jafari, 2001; Panosso Netto, 2007).

One of the earliest systematic conceptualizations of tourism diversity was proposed by Cohen (1984), who argued that tourism should be understood as a multidimensional social phenomenon rather than simply a leisure industry. Reviewing the sociological foundations of tourism studies, Cohen demonstrated that tourism incorporates multiple tourist motivations, behavioural patterns and forms of interaction with host communities. His framework identified tourism simultaneously as commercialized hospitality, modern leisure, cultural exchange, pilgrimage, ethnic relations and an acculturative process, thereby illustrating the heterogeneity of tourism experiences. Importantly, Cohen's recognition that tourists differ fundamentally in their motivations and expectations provided an important theoretical basis for the later emergence of specialized tourism forms, including contemporary alternative tourism. However, because the study preceded the rapid expansion of wellness, retreat, spiritual and other experience-oriented tourism markets, it did not conceptualize these forms as distinct market segments, leaving important opportunities for further theoretical development (Cohen, 1984).

An equally influential anthropological perspective was introduced by Smith (1989), who shifted attention from tourism itself toward the relationships between hosts and guests. Rather than evaluating tourism primarily through its economic impacts, Smith conceptualized tourism as a process of cultural interaction in which visitors and local communities continuously influence one another. The volume proposed one of the earliest typologies of tourism by distinguishing historical, cultural, ethnic, environmental and recreational tourism, thereby demonstrating that different tourism forms generate different patterns of cultural exchange and socio-economic consequences. Furthermore, Smith emphasized that tourism should be interpreted as a dynamic process of negotiation between economic development and cultural preservation, an idea that remains highly relevant for contemporary discussions concerning authenticity, sustainability and responsible tourism. Nevertheless, the proposed typology predates the emergence of wellness tourism, retreat tourism, digital detox tourism and other modern forms of alternative tourism that have become increasingly important within contemporary tourism markets (Smith, 1989).

The theoretical maturation of tourism studies was further advanced by Jafari (2001), who explained tourism's evolution into an independent multidisciplinary scientific field. According to Jafari, tourism research progressed through four complementary knowledge platforms: the Advocacy Platform, emphasizing tourism's benefits; the Cautionary Platform, focusing on its negative impacts; the Adaptancy Platform, promoting sustainable and alternative forms of tourism; and the Knowledge-Based Platform, integrating previous perspectives into a comprehensive scientific framework. This final platform conceptualizes tourism as an interconnected socio-economic system requiring contributions from economics, sociology, anthropology, geography, psychology,

ecology and management. Particularly significant for the present study is Jafari's Adaptancy Platform, which recognized the growing importance of alternative tourism as a response to the environmental and socio-cultural limitations of mass tourism. However, although the framework acknowledged ecotourism, rural tourism and sustainable tourism, it did not anticipate the subsequent emergence of wellness, retreat, mindfulness and transformational tourism, which have become increasingly prominent in the twenty-first century (Jafari, 2001).

Building upon systems thinking, Panosso Netto (2007) further contributed to the epistemological development of tourism by distinguishing between tourism as a phenomenon and tourism as an academic field of inquiry. Reviewing the historical evolution of tourism definitions, the author demonstrated that tourism has progressed through three principal theoretical stages: the pre-paradigmatic phase, focused on defining tourism; the tourism systems phase, conceptualizing tourism as an interconnected network of actors and institutions; and the new approaches phase, incorporating interdisciplinary, critical and post-positivist perspectives. This interpretation reinforces the idea that tourism should be understood as a complex system of interactions rather than as an isolated economic activity. Nevertheless, Panosso Netto's discussion remains primarily epistemological and does not examine the diversification of alternative tourism into specialized market segments or their contemporary significance within the EU (Panosso Netto, 2007).

Anthropological critiques have further enriched the theoretical understanding of alternative tourism by questioning the ethical implications of authenticity and cultural exchange. Korstanje (2012) argues that cultural and ethnic tourism should not be viewed exclusively as mechanisms for heritage preservation or intercultural understanding because they may also reproduce unequal power relations and commodify indigenous cultures. From this perspective, authenticity is interpreted as a socially constructed and negotiated phenomenon rather than an objective characteristic of destinations. Similarly, Smith's (1989) host-guest framework suggests that tourism inevitably transforms both visitors and local communities through continuous cultural interaction. Together, these perspectives emphasize that alternative tourism cannot be evaluated solely according to economic performance but must also consider issues of representation, identity, cultural ownership and social justice (Smith, 1989; Korstanje, 2012).

Collectively, these theoretical contributions demonstrate that tourism has evolved from a narrowly defined economic activity into a multidimensional socio-economic and cultural system characterized by diverse tourist motivations, destination characteristics and stakeholder relationships. At the same time, they reveal that most classical theories were developed before the rapid expansion of many contemporary forms of alternative tourism, including wellness tourism, retreat tourism, digital detox tourism, spiritual tourism and transformational tourism. Consequently, while existing theoretical frameworks successfully explain tourism as a complex social phenomenon, they provide only limited guidance for understanding the contemporary diversification of alternative tourism markets. The present study builds upon these foundational theories by conceptualizing alternative tourism as an integrated system of measurable and interconnected market segments, whose development reflects changing tourist motivations toward sustainability, authenticity, well-being, cultural immersion and personal transformation across EU countries.

2.2. Alternative tourism, sustainability and tourism diversification

The development of alternative tourism is closely associated with the broader paradigm of sustainable tourism development, which emerged as a response to the environmental, social and economic limitations of mass tourism. While conventional tourism has historically been evaluated primarily through visitor numbers, tourism receipts and employment generation, sustainable tourism emphasizes the balanced integration of economic prosperity, environmental conservation and socio-cultural well-being. Within this framework, alternative tourism represents not merely a collection of niche tourism products but a strategic approach to tourism development that promotes responsible resource use, local participation, cultural preservation and diversified destination economies. Consequently, sustainability and diversification have become two complementary principles underpinning the contemporary evolution of alternative tourism (Weaver, 2006; Hall, 2019).

One of the earliest systematic interpretations of this relationship was proposed by Weaver (2006), who argued that alternative tourism should be understood as a reaction against the environmental degradation, cultural commodification and spatial concentration associated with mass tourism. According to Weaver, sustainable

tourism extends beyond environmental protection by incorporating long-term economic viability, social equity and destination resilience. Rather than replacing mass tourism entirely, alternative tourism should complement conventional tourism through the development of smaller-scale, locally embedded and environmentally responsible tourism products. This perspective established an important conceptual foundation by linking alternative tourism directly with sustainable development principles and by emphasizing the need to balance tourism growth with destination carrying capacity and community well-being (Weaver, 2006).

Subsequent research has further strengthened this relationship by emphasizing the strategic importance of tourism diversification. Hall (2019) argues that sustainable tourism requires destinations to diversify both their tourism products and visitor markets in order to reduce vulnerability to economic fluctuations, seasonality and external shocks. Diversification enables destinations to distribute tourism demand more evenly across geographical areas, seasons and tourism activities while simultaneously reducing dependence on highly standardized tourism products. In this context, alternative tourism contributes to destination resilience by expanding tourism opportunities beyond traditional coastal, urban or seasonal tourism and by encouraging the development of products that respond to increasingly heterogeneous visitor preferences (Hall, 2019).

The importance of diversification is examined empirically by Solarin, Ulucak and Erdogan (2024), who investigate the relationship between tourism diversification and economic growth. Their study demonstrates that tourism diversification should not be measured solely through the expansion of visitor source markets but also through the diversification of tourism activities themselves. While diversification of European tourism markets contributes positively to long-term economic growth, the diversification of tourism products exhibits even stronger and more consistent economic benefits by stimulating multiple sectors of the economy, including transport, hospitality, agriculture and health services. The authors therefore conclude that expanding the variety of tourism experiences represents a more sustainable development strategy than merely increasing tourist arrivals. These findings reinforce the argument that the growing diversity of alternative tourism products – including wellness, rural, adventure and nature-based tourism – constitutes an important mechanism for strengthening tourism competitiveness and economic resilience (Solarin et al., 2024).

A similar perspective is presented by Jovanović and Živković (2018), who argue that sustainable destination development depends upon the creation of diversified tourism portfolios rather than reliance on individual tourism products. Their analysis demonstrates that integrating complementary forms of tourism –including ecotourism, rural tourism, spa tourism, cultural tourism and adventure tourism – enables destinations to extend product life cycles, increase competitiveness and respond more effectively to changing tourist demand. Furthermore, diversification generates broader economic benefits by strengthening linkages between tourism, agriculture, environmental conservation and cultural heritage preservation. The authors therefore conceptualize tourism diversification as a multidimensional strategy simultaneously supporting economic development, environmental sustainability and regional resilience (Jovanović & Živković, 2018).

The relationship between diversification and sustainable regional development is examined further by Ursache (2015), who analyses niche tourism markets within the European Union's eastern periphery. The study argues that contemporary tourists increasingly seek authentic, personalized and experience-based travel, encouraging destinations to develop specialized tourism products based on their comparative advantages. Ursache conceptualizes niche tourism as a multidimensional framework incorporating cultural tourism, gastronomic tourism, wellness tourism and numerous other specialized tourism forms. Rather than treating these markets independently, the study demonstrates that diversification enables destinations to utilize local natural resources, cultural heritage and regional identity more effectively while simultaneously enhancing destination competitiveness and supporting sustainable rural development. This perspective reinforces the growing understanding that alternative tourism is not a single tourism segment but a portfolio of complementary tourism experiences responding to diverse consumer motivations (Ursache, 2015).

The importance of rural tourism as an instrument of economic diversification is examined comprehensively by Đorđević-Milošević et al. (2020). Their comparative analysis of South East European countries demonstrates that rural tourism has become an essential component of regional development policies, particularly in areas affected by depopulation, unemployment and declining agricultural incomes. The authors argue that rural

tourism should not be viewed simply as a tourism activity but as a multifunctional development strategy integrating agriculture, local entrepreneurship, gastronomy, cultural heritage and environmental conservation. Successful rural tourism therefore depends upon coordinated institutional support, infrastructure investment and community participation rather than tourism development alone. Although the geographical focus extends beyond the European Union, the study illustrates how tourism diversification contributes simultaneously to economic resilience, social cohesion and environmental sustainability, principles that are equally relevant to contemporary EU tourism policy (Đorđević-Milošević et al., 2020).

The sustainability dimension of tourism diversification is further strengthened by Stoiljković et al. (2025), who evaluate tourism efficiency across European countries using a sustainability-oriented Data Envelopment Analysis (DEA) framework. Unlike conventional efficiency studies focused exclusively on economic outputs, the authors integrate tourism demand, employment, greenhouse gas intensity and tourism revenues into a comprehensive sustainability assessment. Their findings demonstrate considerable regional differences in tourism efficiency and indicate that sustainable tourism performance depends not only on visitor numbers but also on longer lengths of stay, lower environmental impacts and higher value creation. The study therefore highlights that future tourism competitiveness should be evaluated through integrated sustainability indicators rather than through tourism growth alone, reinforcing the broader shift toward quality-oriented and environmentally responsible tourism development (Stoiljković et al., 2025).

Recent studies have also demonstrated that diversification has become increasingly important in the context of global crises and structural transformations affecting tourism. Borutska et al. (2022) argue that the COVID-19 pandemic accelerated changes in tourist behaviour by increasing demand for safer, healthier and more environmentally responsible destinations. As a consequence, domestic tourism, nature-based tourism and environmentally sustainable destinations became increasingly attractive, while destinations dependent on mass international tourism experienced significant declines. The authors conclude that future tourism development will rely increasingly on digitalization, health protection, environmental quality and diversified tourism products rather than the previous model centred on maximizing tourist arrivals. Their findings therefore provide additional evidence that sustainability and diversification have become mutually reinforcing characteristics of contemporary tourism development (Borutska et al., 2022).

2.3. Wellness, health and retreat tourism as emerging alternative tourism segments

Among the numerous forms of contemporary alternative tourism, wellness, health and retreat tourism have become some of the fastest-growing and conceptually most dynamic segments. Their expansion reflects profound socio-economic changes, including population ageing, increasing prevalence of stress-related disorders, growing public interest in preventive healthcare, and changing consumer preferences toward experiences that promote physical, psychological and spiritual well-being. Unlike conventional leisure tourism, which primarily emphasizes recreation and entertainment, wellness-oriented tourism increasingly focuses on holistic health, self-development, mindfulness and lifestyle transformation. Consequently, these tourism forms have gradually evolved from niche products into strategically important components of the global tourism industry and represent one of the principal directions through which alternative tourism continues to diversify (Smith & Puczkó, 2014; Global Wellness Institute, 2025).

A significant milestone in the conceptual development of wellness tourism was the publication of Bushell and Sheldon (2009), which positioned wellness tourism within a holistic framework integrating mind, body, spirit and place. Rather than defining wellness exclusively through physical health or spa services, the contributors argue that tourism experiences can promote multiple dimensions of well-being, including emotional balance, spiritual fulfilment, social connectedness and interaction with natural environments. The volume demonstrates that wellness tourism should be understood as a multidimensional tourism philosophy rather than simply a specialized tourism product, thereby establishing one of the earliest comprehensive theoretical frameworks linking tourism with holistic well-being. Within this perspective, destinations, landscapes and local communities become active contributors to visitors' physical and psychological restoration rather than merely locations where tourism activities occur (Bushell & Sheldon, 2009).

Expanding this holistic perspective, Kelly and Smith (2009) introduce the concept of holistic tourism, arguing that tourism experiences should simultaneously address the interconnected dimensions of body, mind and spirit. The authors contend that modern tourists increasingly seek experiences that provide not only relaxation but also opportunities for self-reflection, personal growth, emotional restoration and spiritual development. Consequently, wellness tourism extends beyond traditional spa facilities by incorporating mindfulness practices, meditation, healthy lifestyles, nature immersion and transformative experiences. Their work highlights the gradual convergence between wellness tourism, spiritual tourism and retreat tourism, suggesting that the boundaries separating these tourism forms have become increasingly fluid as tourists pursue more integrated approaches to health and well-being (Kelly & Smith, 2009).

The conceptual evolution of health tourism is examined comprehensively by Smith and Puczkó (2014), who distinguish clearly between medical tourism and wellness tourism. According to the authors, medical tourism is primarily motivated by diagnosis, treatment and rehabilitation, whereas wellness tourism focuses on prevention, lifestyle improvement and holistic well-being. They further demonstrate that wellness tourism has expanded considerably beyond traditional spa services to include complementary and alternative therapies, healthy nutrition, beauty and cosmetic treatments, longevity programmes, preventive healthcare and lifestyle-based wellness. The authors attribute this diversification to several long-term socio-economic trends, including population ageing, increased public attention to preventive medicine, growing acceptance of complementary therapies and changing consumer lifestyles. Consequently, wellness tourism has evolved into one of the most innovative and rapidly expanding sectors of contemporary tourism, encouraging destinations to diversify their tourism portfolios while integrating hospitality, healthcare and tourism services into comprehensive visitor experiences (Smith & Puczkó, 2014).

The relationship between tourism and psychological well-being has received increasing scholarly attention in recent years. Buckley (2023) argues that tourism should be recognized not only as a leisure activity but also as an important contributor to mental health. Reviewing evidence from multiple tourism sectors, the author demonstrates that nature tourism, cultural tourism and adventure tourism generate measurable psychological benefits through stress reduction, emotional restoration, self-confidence and personal transformation. Importantly, Buckley proposes that tourism products should be intentionally designed to maximize mental health outcomes and that tourism destinations should increasingly communicate these benefits within destination marketing and tourism policy. This perspective broadens the conceptual boundaries of wellness tourism by positioning psychological health as a central outcome of tourism participation rather than a secondary consequence of leisure travel (Buckley, 2023).

Empirical support for this broader conceptualization is provided by Dillet et al. (2020), who investigate the experiential foundations of holistic wellness tourism through the analysis of international wellness travellers' experiences. Building upon Dunn's holistic wellness theory, the authors identify four interrelated dimensions of wellness experiences—body, mind, spirit and environment. Their findings demonstrate that physical health programmes, psychological restoration, spiritual engagement and environmental quality jointly contribute to visitors' holistic well-being, while deficiencies in any of these dimensions may reduce the overall effectiveness of wellness tourism experiences. The study therefore confirms that wellness tourism should be interpreted as a multidimensional phenomenon extending well beyond physical health, reinforcing the conceptual integration proposed by Bushell and Sheldon (2009) and Kelly and Smith (2009) (Dillet et al., 2020).

Within the broader wellness tourism framework, retreat tourism has emerged as a particularly distinctive and rapidly developing market segment. Kelly (2010) provides one of the first comprehensive empirical investigations of retreat tourism by analysing more than 500 retreat centres worldwide and conducting detailed interviews with 50 retreat operators. The study demonstrates that retreat providers differ substantially from traditional wellness enterprises because they are predominantly lifestyle entrepreneurs motivated by personal philosophies, holistic values and quality-of-life aspirations rather than purely commercial objectives. Furthermore, retreat tourism is characterized by immersive programmes emphasizing mindfulness, meditation, spiritual reflection, self-development and holistic well-being rather than conventional spa or medical services. Kelly therefore argues that retreat tourism possesses sufficiently distinctive organizational, experiential and

philosophical characteristics to justify its recognition as a separate category within the broader wellness tourism market (Kelly, 2010).

The growing significance of retreat tourism is further reinforced by research examining its psychological and behavioural outcomes. McClintock et al. (2019) conducted a meta-analysis of nineteen empirical studies evaluating the effects of mindfulness retreats on non-clinical adult populations. Their findings reveal significant improvements in mindfulness, psychological well-being and reductions in stress, anxiety and depression, with many benefits persisting after retreat participation. These results provide robust empirical evidence that retreat tourism contributes not only to temporary relaxation but also to lasting psychological development and behavioural change. Similarly, Quaye (2025) demonstrates that digital detox tourism, another rapidly emerging retreat-oriented tourism form, responds to increasing concerns regarding technological overload by combining mindfulness practices, nature-based activities and structured wellness programmes. Together, these studies indicate that contemporary retreat tourism increasingly addresses modern psychological challenges associated with stress, digital dependence and declining work-life balance (McClintock et al., 2019; Quaye, 2025).

The motivational foundations underlying these tourism experiences can be further explained through Self-Determination Theory developed by Deci and Ryan (2000). According to this framework, psychological well-being depends upon the satisfaction of three universal psychological needs: autonomy, competence and relatedness. Wellness and retreat tourism provide favourable environments for satisfying these needs by enabling voluntary withdrawal from everyday routines, encouraging personal development through mindfulness and wellness activities, and fostering meaningful relationships with other participants, local communities and natural environments. Consequently, Self-Determination Theory offers a robust psychological explanation for the increasing demand for wellness and retreat tourism by demonstrating how these tourism experiences contribute to long-term psychological flourishing rather than merely providing recreational benefits (Deci & Ryan, 2000).

2.4. Alternative tourism market development and EU trends

The expansion of alternative tourism over the past two decades reflects broader structural transformations occurring within the global and European tourism industries. Increasing environmental awareness, demographic change, digitalization, changing consumer lifestyles and the growing emphasis on health and well-being have collectively reshaped tourism demand, encouraging destinations to diversify beyond conventional mass tourism products. As a result, alternative tourism has evolved from a collection of niche activities into an increasingly significant market characterized by continuous product innovation, greater specialization and stronger integration with sustainability objectives. Contemporary tourism markets are therefore increasingly driven by demand for authentic, experience-based and value-oriented travel, creating favourable conditions for the expansion of wellness tourism, rural tourism, nature-based tourism, adventure tourism, pilgrimage tourism and other specialized tourism forms (OECD, 2026; European Travel Commission, 2025).

Recent market analyses indicate that alternative tourism represents one of the fastest-growing components of the global tourism economy. According to Market.us (2025), the global alternative tourism market was valued at USD 116.3 billion in 2024 and is projected to reach approximately USD 200.5 billion by 2034, corresponding to a compound annual growth rate of 5.6%. The report attributes this expansion to growing environmental consciousness, increasing demand for authentic cultural experiences and rising interest in sustainable travel practices. Rather than being confined to individual tourism niches, alternative tourism is presented as a diversified market incorporating ecotourism, adventure tourism, community-based tourism and other responsible travel experiences that increasingly differentiate themselves from standardized package tourism. This market evolution demonstrates that alternative tourism has become an economically significant component of the contemporary tourism industry rather than a marginal segment serving only specialized consumer groups (Market.us, 2025).

The rapid expansion of the wellness economy further illustrates this transformation. According to the Global Wellness Institute (2025), the global wellness economy reached USD 6.8 trillion in 2024, having doubled in size since 2013 and consistently outperformed global GDP growth over the same period. Europe is identified

as one of the fastest-growing regional wellness economies, while all eleven wellness sectors have exceeded their pre-pandemic market levels. Particularly strong growth has been observed in wellness real estate, mental wellness and preventive health services, reflecting changing consumer priorities toward healthier lifestyles and psychological well-being. The Institute projects that the wellness economy will continue expanding at a rate substantially exceeding global economic growth, reinforcing the strategic importance of wellness-related tourism products within contemporary tourism markets (Global Wellness Institute, 2025). These trends are complemented by the broader analysis of the Global Wellness Institute (2026), which argues that wellness tourism increasingly represents one of the principal mechanisms through which tourism contributes simultaneously to economic development, public health and sustainable lifestyles.

The growing importance of alternative tourism is equally evident within the European Union. According to Future Market Insights (2025), the EU tourism industry is expected to expand from USD 722.9 billion in 2025 to approximately USD 1.49 trillion by 2035, representing a compound annual growth rate of 7.4%. The report identifies digital transformation, tourism analytics and online booking technologies as key drivers of future competitiveness, with online booking already accounting for more than two-thirds of tourism transactions. Simultaneously, the increasing prominence of operators specializing in adventure, nature-based and responsible tourism demonstrates that tourism growth is increasingly associated with diversified tourism products rather than standardized package holidays. These findings suggest that technological innovation and product diversification have become mutually reinforcing drivers of tourism market development across Europe (Future Market Insights, 2025).

The OECD Tourism Trends and Policies 2026 report similarly emphasizes that tourism has entered a period characterized by structural rather than cyclical change. The report argues that post-pandemic tourism recovery is increasingly shaped by sustainability, digitalization, resilience and visitor experience quality instead of maximizing tourism volumes alone. Governments are encouraged to diversify tourism products, strengthen regional tourism development, promote year-round tourism and reduce dependence on highly concentrated visitor flows. Furthermore, tourism policies increasingly recognize the importance of improving visitor well-being, environmental performance and destination resilience while supporting innovation and digital transformation. These policy directions closely align with the principles underlying alternative tourism and reinforce its growing strategic importance within European tourism development (OECD, 2026).

Evidence of market transformation is further supported by studies examining the changing structure of tourism demand. Borutska et al. (2022) demonstrate that the COVID-19 pandemic accelerated existing shifts toward healthier, safer and more sustainable tourism experiences. Domestic tourism, nature-based tourism and environmentally responsible destinations recovered more rapidly than destinations dependent upon international mass tourism, suggesting that changing consumer preferences have reinforced demand for alternative tourism products. Similarly, Badulescu et al. (2026) argue that contemporary tourism development is increasingly characterized by diversification, innovation and experiential consumption, with tourists placing greater value on authenticity, sustainability, local culture and personalized experiences than on traditional standardized tourism products. Together, these studies indicate that the evolution of tourism demand extends beyond temporary post-pandemic adjustments and reflects long-term structural changes within international tourism markets (Borutska et al., 2022; Badulescu et al., 2026).

Within the EU, these structural changes are observable across multiple alternative tourism segments. Wellness tourism has continued to expand through investments in spa infrastructure, preventive health services and lifestyle-oriented hospitality (Global Wellness Institute, 2025). Platform-based accommodation has become one of the most measurable indicators of tourism diversification, with Eurostat reporting record numbers of guest nights booked through online accommodation platforms (Eurostat, 2026a, 2026b). Rural tourism and agritourism continue to develop through diversification of agricultural activities, increased demand for authentic local experiences and stronger policy support for rural development (European Parliamentary Research Service, 2023; ISTAT, 2018, 2025). Meanwhile, nature-based tourism benefits from growing visitation to protected areas and national parks, supported by increasing public interest in biodiversity conservation and outdoor recreation (Metsähallitus, 2025a, 2025b). At the same time, pilgrimage and spiritual tourism have experienced renewed growth through the recovery of major European pilgrimage destinations,

including Santiago de Compostela, Lourdes, Fátima and the Rome Jubilee, demonstrating that cultural heritage, spirituality and personal development have become increasingly integrated within contemporary tourism markets (Cathedral of Santiago de Compostela, 2026; Sanctuary of Lourdes, 2024; Shrine of Fátima, 2026; Vatican News, 2026).

2.5. Research gap

The literature demonstrates that alternative tourism has evolved into an increasingly important direction of contemporary tourism development, reflecting the growing demand for sustainable, authentic, experience-based and well-being-oriented travel. Classical tourism theories have established the conceptual foundations for understanding tourism as a multidimensional socio-economic and cultural phenomenon (Cohen, 1984; Smith, 1989; Jafari, 2001; Panosso Netto, 2007), while more recent studies have linked alternative tourism to sustainable development, destination resilience and tourism diversification (Weaver, 2006; Hall, 2019; Jovanović & Živković, 2018; Solarin et al., 2024). Simultaneously, the rapid expansion of wellness, retreat, rural, nature-based and spiritual tourism has demonstrated that tourism demand is increasingly driven by health, authenticity, personal development, environmental responsibility and meaningful experiences rather than traditional leisure consumption (Smith & Puczkó, 2014; Kelly, 2010; Buckley, 2023; Global Wellness Institute, 2025).

Despite these advances, the existing literature remains highly fragmented. Most studies **investigate individual forms of alternative tourism** independently, including wellness tourism (Smith & Puczkó, 2014), retreat tourism (Kelly, 2010), rural tourism (Đorđević-Milošević et al., 2020), ecotourism (Jovanović & Živković, 2018), mindfulness tourism (McClintock et al., 2019), digital detox tourism (Quaye, 2025), cultural tourism (Korstanje, 2012), or nature-based tourism (Buckley, 2023). Although these contributions substantially improve understanding of specific tourism segments, they rarely examine the conceptual and market interrelationships among these forms or explain how they collectively constitute the broader phenomenon of alternative tourism. As a result, alternative tourism is frequently treated as an umbrella concept without a sufficiently integrated analytical framework capable of explaining its internal structure and contemporary evolution.

A second limitation concerns the conceptual ambiguity surrounding the definition and boundaries of alternative tourism. While the literature generally agrees that alternative tourism differs from conventional mass tourism through its emphasis on sustainability, authenticity and individualized experiences, there is no consensus regarding which tourism forms should be included within this concept. Considerable overlap exists among wellness tourism, retreat tourism, spiritual tourism, sacred tourism, transformational tourism, nature-based tourism and health tourism (Bushell & Sheldon, 2009; Kelly & Smith, 2009; Kelly, 2010; Smith & Puczkó, 2014; Buckley, 2023). Consequently, existing classifications often employ inconsistent terminology or analyse these tourism forms separately without clarifying their conceptual relationships. This lack of conceptual integration limits comparative research and complicates the measurement of alternative tourism as a coherent market.

Another important limitation concerns the predominant focus on conceptual, psychological or destination-level analyses, while comparatively little attention has been devoted to market-oriented investigations of alternative tourism. Numerous studies examine tourist motivations, psychological outcomes, sustainability principles or destination management (Kelly, 2010; Jovanović & Živković, 2018; McClintock et al., 2019; Buckley, 2023), whereas market reports primarily estimate industry size and growth without providing an integrated conceptual interpretation of alternative tourism (Market.us, 2025; Future Market Insights, 2025). Consequently, relatively few studies combine conceptual tourism theory with statistical evidence capable of demonstrating how alternative tourism develops across different tourism segments and geographical contexts. This separation between theoretical and market-oriented research restricts a comprehensive understanding of alternative tourism as an evolving economic system.

A further limitation concerns the measurement of alternative tourism, particularly within the European Union. Official statistical systems, including Eurostat, do not classify alternative tourism as an independent tourism category. Instead, information is distributed across multiple statistical domains, including wellness tourism,

platform-based accommodation, rural tourism, protected areas, pilgrimage destinations, cycling tourism and other specialized tourism activities (Eurostat, 2026a, 2026b; Global Wellness Institute, 2025; European Parliamentary Research Service, 2023). Consequently, the overall development of alternative tourism cannot be evaluated through a single statistical indicator but requires the integration of multiple measurable tourism segments. Despite the availability of these datasets, relatively few academic studies have attempted to combine them into a unified analytical framework capable of assessing the overall development of alternative tourism markets across European Union countries.

Moreover, although several studies investigate tourism diversification as a determinant of economic growth or destination competitiveness (Solarin et al., 2024; Ursache, 2015; Stoiljković et al., 2025), they generally focus on single destinations, individual countries or specific tourism products rather than undertaking comparative analyses across the European Union. Existing research therefore provides limited understanding of how EU member states differ in their specialization, comparative advantages and market structure with respect to alternative tourism. Comparative evidence remains fragmented across wellness tourism, agritourism, pilgrimage tourism, nature-based tourism and digital tourism, while relatively little attention has been devoted to analysing these segments collectively as components of one diversified tourism market.

Therefore, the present study seeks to address these gaps by conceptualizing alternative tourism as a diversified system of measurable and interconnected tourism segments rather than as a single tourism activity. Unlike previous studies that focus on individual tourism forms or isolated destination case studies, this research integrates conceptual tourism theory with official statistical indicators, market evidence and country-level examples to examine the development of alternative tourism across the EU. Particular attention is devoted to wellness, spa and thermal tourism, rural tourism and agritourism, nature-based tourism, adventure tourism, platform-based accommodation, pilgrimage and spiritual tourism, which collectively represent the principal measurable components of the contemporary alternative tourism market.

3. Conceptual framework for understanding alternative tourism and research methodology

The conceptual framework proposed in this study conceptualizes alternative tourism as a multidimensional tourism system that has emerged through the diversification of contemporary tourist demand and the transition from standardized mass tourism toward more personalized, sustainable, authentic, and transformative travel experiences (Jafari, 2001; Hall, 2019; OECD, 2026). Rather than representing a single tourism product, alternative tourism constitutes an umbrella concept encompassing multiple interconnected market segments that share common sustainability-oriented values while differing in their dominant motivations, tourism activities, and market characteristics (Ursache, 2015).

The framework is grounded in several complementary theoretical perspectives. General Systems Theory views tourism as an open system composed of interdependent elements whose interactions determine overall system performance (Bertalanffy, 1968/2015). This systems perspective is complemented by Leiper's Tourism System Model, which conceptualizes tourism through the relationships among tourist-generating regions, transit routes, destinations, tourists, and the tourism industry (Leiper, 1979). Jafari's knowledge-based platform further demonstrates the evolution of tourism scholarship from advocacy and cautionary approaches toward more balanced, scientific, and sustainability-oriented perspectives (Jafari, 2001). Similarly, Butler's Tourism Area Life Cycle (TALC) explains the dynamic evolution of destinations through successive stages of exploration, involvement, development, consolidation, stagnation, and potential rejuvenation or decline (Butler, 2006). Collectively, these theories explain tourism as a complex socio-economic system but provide only limited insight into the rapidly expanding diversification of alternative tourism markets.

Within this framework, alternative tourism represents the central analytical construct integrating multiple specialized tourism segments. These include wellness tourism, spiritual (sacral) tourism, retreat tourism, ecotourism, cultural tourism, rural tourism, adventure tourism, and other forms of niche tourism (Smith & Puczkó, 2014; Ursache, 2015; Hall, 2019; Market.us, 2025). Although these tourism forms differ in their products and experiences, they are connected by several common principles:

- sustainability and responsible resource management;

- authenticity of tourism experiences;
- meaningful interaction with local communities and cultures;
- enhancement of physical, psychological, and emotional well-being;
- personal learning, self-development, and transformation.

The framework further proposes that the diversification of alternative tourism is primarily driven by changing tourist motivations. Contemporary travellers increasingly seek experiences extending beyond traditional recreation toward physical health, psychological restoration, mindfulness, cultural immersion, environmental responsibility, digital disconnection, spirituality, and self-realization (Bushell & Sheldon, 2009; Kelly & Smith, 2009; McClintock et al., 2019; Dillelte et al., 2020). These evolving motivations stimulate demand for increasingly specialized tourism experiences and facilitate the emergence of new market segments, particularly wellness tourism, retreat tourism, transformational tourism, and spiritual tourism (Global Wellness Institute, 2025, 2026).

At the destination level, the development of alternative tourism depends on a combination of destination resources and enabling conditions, including natural and cultural assets, tourism infrastructure, accessibility, institutional support, governance quality, environmental sustainability, innovation, and digital technologies (Hall, 2019; European Travel Commission, 2025; OECD, 2026). These destination characteristics determine the ability of regions to develop competitive alternative tourism products while balancing economic development with environmental protection and community well-being.

The interaction between tourist motivations, destination capabilities, and tourism management practices generates multiple measurable outcomes across four interrelated dimensions. Economic outcomes include regional income generation, employment creation, tourism competitiveness, destination resilience, and diversification of tourism markets (OECD, 2026; European Travel Commission, 2025). Social outcomes encompass community participation, preservation of cultural heritage, social cohesion, and improvements in residents' quality of life (Hall, 2019). Environmental outcomes involve sustainable resource management, biodiversity conservation, reduced tourism pressure through spatial and seasonal dispersion, and support for sustainable regional development (Hall, 2019). Finally, individual outcomes include improvements in physical health, psychological well-being, life satisfaction, mindfulness, emotional recovery, and personal transformation (Bushell & Sheldon, 2009; McClintock et al., 2019; Dillelte et al., 2020).

An important feature of the framework is the recognition that the individual segments of alternative tourism are highly interconnected rather than mutually exclusive. Wellness tourism increasingly incorporates mindfulness, spirituality, and nature-based experiences (Smith & Puczkó, 2014; Dillelte et al., 2020). Retreat tourism frequently combines wellness, spiritual, cultural, and transformational elements within a single tourism product (Kelly & Smith, 2009). Similarly, cultural, rural, and ecotourism often integrate wellness-oriented activities and sustainable tourism practices, creating hybrid tourism experiences that respond to increasingly diverse visitor expectations (Hall, 2019; OECD, 2026).

Consequently, this study conceptualizes alternative tourism as an integrated, dynamic, and evolving tourism ecosystem composed of interconnected market segments whose development reflects the interaction between changing tourist motivations, destination resources, institutional support, and sustainability-oriented management practices (Figure 1).

To examine the proposed conceptual framework, the study adopts a mixed conceptual–empirical research design that integrates systems thinking with comparative market analysis. Given that alternative tourism is not recognized as a separate statistical category in official European tourism statistics, the empirical assessment is based on the analysis of multiple measurable tourism segments that collectively represent the contemporary alternative tourism market. This methodological approach reflects the multidimensional nature of alternative tourism and enables its development to be assessed through a combination of official statistical indicators, institutional market reports, and country-level evidence rather than through a single aggregate variable.

The empirical analysis relies primarily on secondary data obtained from official statistical agencies and internationally recognized organizations, including Eurostat, the Global Wellness Institute, the European Travel Commission, the OECD, the European Parliamentary Research Service, ISTAT, Metsähallitus, and the official statistical services of major European pilgrimage destinations. These sources provide harmonized information on tourism expenditure, tourist flows, accommodation demand, infrastructure development, visitor numbers, and economic impacts across different tourism segments. Preference was given to official datasets with continuous annual observations covering the post-pandemic recovery period, thereby enabling the identification of medium-term market trends rather than short-term fluctuations.

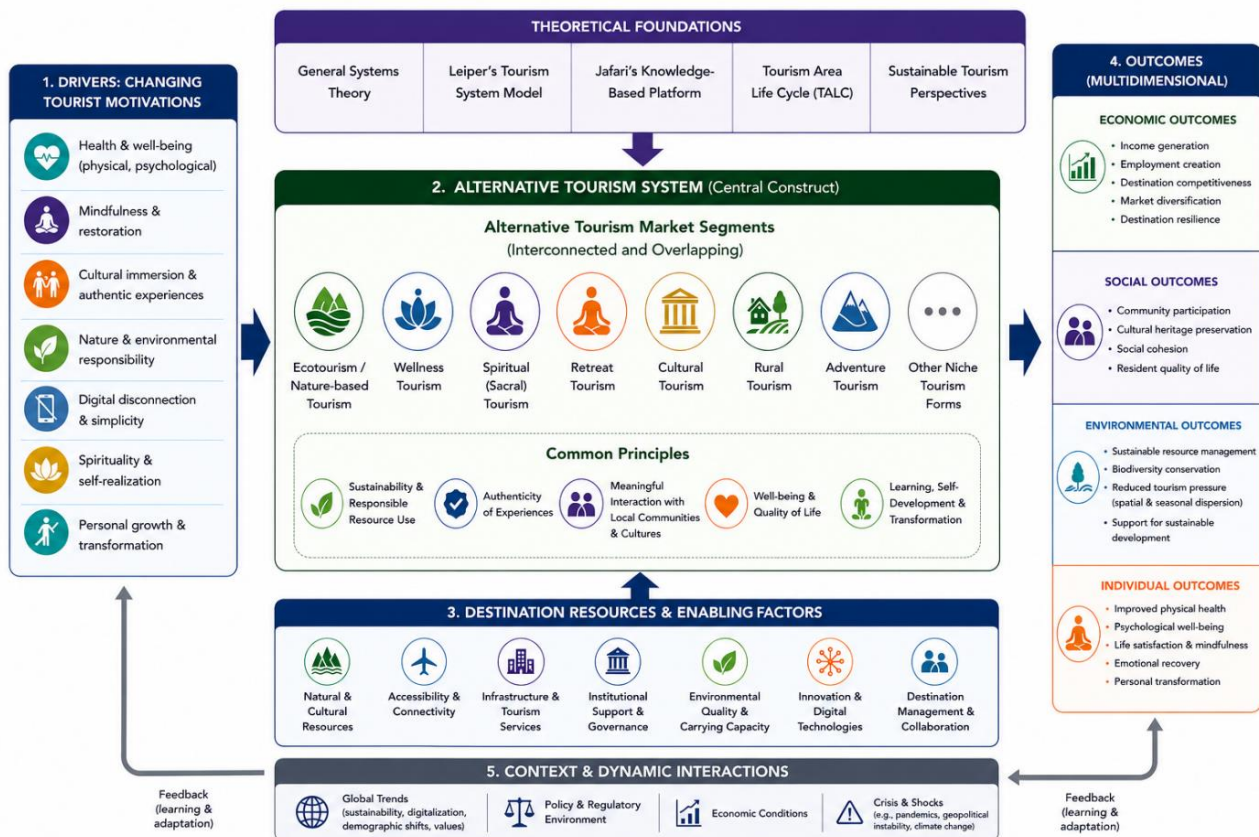


Figure 1. Conceptual framework for understanding alternative tourism: a multidimensional and interconnected tourism system

Source: elaborated by the authors based on Jafari (2001), Hall (2019) and OECD (2026).

Following the conceptual framework presented in Figure 1, the empirical analysis operationalizes alternative tourism through six principal market segments that represent the most measurable and economically significant manifestations of alternative tourism within the European Union: (1) wellness tourism; (2) spa and thermal tourism; (3) platform-based accommodation; (4) rural tourism and agritourism; (5) nature-based tourism; and (6) pilgrimage and spiritual tourism. For each segment, comparable quantitative indicators were analysed, including tourism expenditure, visitor numbers, overnight stays, infrastructure development, accommodation capacity, and selected measures of regional economic impact. Where appropriate, country-level comparisons were incorporated to illustrate differences in market specialization and development trajectories among EU countries.

Rather than attempting to estimate the overall size of the alternative tourism market directly, the study evaluates the consistency of development across its constituent segments. This approach is consistent with the systems perspective underlying the conceptual framework, according to which alternative tourism should be understood as an integrated ecosystem of interconnected market segments rather than as a homogeneous tourism product. Consequently, empirical validation focuses on identifying common patterns of market expansion,

diversification, and structural transformation across multiple tourism segments. Particular attention is paid to the relationships between changing tourist motivations, destination resources, measurable market outcomes, and broader economic, social, and environmental implications.

The empirical findings presented in the following section therefore do not seek to test causal relationships through econometric modelling. Instead, they provide cumulative empirical evidence supporting the conceptual proposition that alternative tourism in the European Union has evolved into an interconnected system of measurable tourism markets characterized by sustained diversification and long-term growth. By integrating evidence from multiple independent datasets, the analysis enables a comprehensive assessment of how the principal segments of alternative tourism collectively contribute to the transformation of the contemporary European tourism industry.

4. Empirical evidence supporting the conceptual framework

The conceptual framework presented in Figure 1 proposes that alternative tourism develops through the interaction between changing tourist motivations, destination resources, market segmentation, and multidimensional sustainability outcomes. To provide empirical support for this conceptual model, official statistical sources and institutional datasets were analysed across the principal segments of alternative tourism in the European Union. Although no single statistical category exists for "alternative tourism", the combined evidence demonstrates consistent expansion across multiple tourism segments, confirming that alternative tourism represents an increasingly important component of the European tourism market rather than a collection of isolated niche activities.

4.1. Growth of wellness tourism

Among all alternative tourism segments, wellness tourism demonstrates one of the strongest and most stable growth trajectories. According to the Global Wellness Institute, wellness tourism expenditure in the EU increased from USD 202.5 billion in 2019 to USD 258.2 billion in 2024, representing an increase of 27.5%, while the number of wellness trips rose from 324.0 million to 348.4 million during the same period. Simultaneously, average expenditure per trip increased from USD 625 to USD 741, indicating not only increasing visitor numbers but also higher tourist spending. Furthermore, all five largest EU wellness markets exceeded their pre-pandemic levels by 2024, while approximately 79% of all wellness trips remained domestic, suggesting that market expansion reflects structural changes in travel behaviour rather than temporary recovery of international tourism (Table 1).

Table 1. Development of wellness tourism in the EU, 2019–2024

Year	Expenditure, USD billion	Wellness trips, million	Average expenditure per trip, USD
2019	202.5	324.0	625.0
2020	102.0	174.0	586.2
2021	139.7	222.5	627.9
2022	188.0	293.0	641.6
2023	232.7	327.1	711.4
2024	258.2	348.4	741.1

Source: compiled by the authors based on Global Wellness Institute (2025).

Following the aggregate EU trends, the Global Wellness Institute also provides comparable country-level expenditure data for the five largest wellness tourism markets within the European Union (Table 2). These data demonstrate that the expansion of wellness tourism is not concentrated in a single destination but represents a widespread phenomenon across the leading European tourism economies.

Table 2. Wellness tourism expenditure in the largest EU markets, USD billion, 2019–2024

Country	2019	2020	2021	2022	2023	2024
France	35.3	22.2	28.8	34.5	41.5	45.6
Germany	36.3	16.3	23.9	28.9	37.3	40.6
Italy	14.6	7.2	10.5	13.0	18.5	20.0
Spain	11.1	3.5	6.1	11.5	14.6	16.7
Austria	15.7	9.7	9.1	13.5	16.4	18.3

Source: compiled by the authors based on Global Wellness Institute (2025).

The country-level evidence demonstrates that by 2024 all five largest EU wellness tourism markets had exceeded their pre-pandemic expenditure levels. Spain recorded the strongest recovery and expansion, with expenditure increasing by 50.5% compared with 2019, followed by Italy (+37.0%), France (+29.2%), Austria (+16.6%), and Germany (+11.8%). These findings indicate that the growth of wellness tourism is geographically widespread rather than concentrated within a limited number of destinations, thereby supporting the conceptualization of wellness tourism as one of the principal and mature segments of the alternative tourism market in the European Union. Furthermore, the European market remains predominantly domestic, with 273.6 million domestic wellness trips (79%) compared with 74.7 million international trips (21%) in 2024. This distribution suggests that the observed market expansion is driven primarily by structural changes in travel behaviour and increasing domestic demand for health- and well-being-oriented experiences, rather than solely by the recovery of international tourism.

Additional evidence highlighting the economic significance of wellness tourism is provided through a comparison with the overall tourism market (Table 3). At the global level, wellness tourism expenditure increased from USD 655.1 billion in 2019 to USD 893.9 billion in 2024, corresponding to an index of 136.4 (2019 = 100), whereas total tourism expenditure increased from USD 4,608.6 billion to USD 5,066.5 billion, corresponding to an index of only 109.9. Consequently, the compound annual growth rate (CAGR) of wellness tourism reached 6.4%, more than three times higher than the average annual growth rate of the overall tourism industry (1.9%). Moreover, average expenditure per wellness trip reached USD 721 in 2024, compared with only USD 340 for tourism overall.

Table 3. Global comparison of wellness tourism and the overall tourism market, 2019–2024

Indicator	Wellness tourism	Overall tourism
Expenditure in 2019, USD billion	655.1	4608.6
Expenditure in 2024, USD billion	893.9	5066.5
Index 2024/2019, %	136.4	109.9
CAGR 2019–2024, %	6.4	1.9
Average expenditure per trip in 2024, USD.	721	340

Source: compiled by the authors based on Global Wellness Institute (2025).

The comparative analysis confirms that wellness tourism is not merely expanding alongside the broader tourism industry but is developing substantially faster and generating considerably higher visitor expenditure. According to the Global Wellness Institute, wellness tourism grew more than three times faster than the global tourism market during 2019–2024, while average expenditure per trip was more than twice as high. In 2024, international wellness travellers spent on average 38% more than conventional international tourists, whereas domestic wellness travellers spent approximately 137% more than their counterparts travelling for general tourism purposes.

Collectively, these findings provide strong empirical support for the conceptual framework by demonstrating that wellness tourism constitutes a rapidly expanding, high-value segment of alternative tourism. The sustained growth in expenditure, tourist flows, and average spending per trip indicates that changing tourist motivations—particularly the increasing emphasis on health, well-being, self-care, and transformational experiences—are

being translated into measurable market expansion. Consequently, wellness tourism represents one of the principal drivers of the contemporary diversification of alternative tourism within the EU.

4.2. Expansion of spa and thermal tourism

The empirical evidence further demonstrates the continuing development of spa and thermal tourism, representing one of the principal market manifestations of wellness-oriented travel. Between 2019 and 2024, European spa-sector revenue increased by 30.3%, while the number of spa establishments grew by 13.5%. Thermal and mineral spring tourism also exhibited positive dynamics, with total revenue increasing by 16.5%, despite the number of operating facilities remaining almost unchanged (Table 4). This indicates that market growth has been driven primarily by increasing visitor expenditure and improved economic performance rather than by simple expansion of physical infrastructure.

Table 4. Growth of spa and thermal tourism in Europe, 2019–2024

Indicator	2019	2024	Growth
Spa sector revenue, USD billion	43.61	56.83	+30.3%
Spa establishments	59,696	67,739	+13.5%
Thermal/mineral spring revenue, USD billion	25.20	29.35	+16.5%
Thermal facilities	6,482	6,536	+0.8%

Source: compiled by the authors based on Global Wellness Institute (2025).

Comparable annual data for the five largest European Union spa markets further demonstrate that the expansion of the spa sector has occurred across the major tourism economies rather than being limited to a few destinations (Table 5). Germany remained the largest spa market throughout the study period, with revenue increasing from USD 8.28 billion in 2019 to USD 10.02 billion in 2024. France recorded the strongest growth among the five largest markets (+41.4%), followed by Austria (+36.2%), while Italy and Spain also exceeded their pre-pandemic revenue levels by 2024. These findings indicate that spa tourism has become an increasingly important component of wellness-oriented travel across the European Union.

Table 5. Comparative annual spa sector revenue in the five largest EU markets, USD billion, 2019–2024

Country	2019	2020	2021	2022	2023	2024
Germany	8.28	6.10	5.85	7.90	8.79	10.02
France	5.27	3.41	3.92	5.19	6.38	7.45
Italy	4.09	2.11	2.27	3.35	4.62	4.82
Spain	3.31	1.73	1.98	2.92	3.36	3.78
Austria	2.32	1.30	1.28	2.15	2.73	3.16

Source: compiled by the authors based on Global Wellness Institute (2025).

Thermal and mineral spring tourism demonstrates a similar pattern of long-term expansion. Between 2019 and 2024, total European revenue increased from USD 25.2 billion to USD 29.35 billion, whereas the number of facilities remained virtually unchanged (6,482 and 6,536 establishments, respectively) (Global Wellness Institute, 2025). Consequently, the observed growth was driven primarily by higher revenues generated by existing facilities rather than by expansion of infrastructure, suggesting improvements in visitor expenditure, service quality, and operational efficiency.

Comparable country-level statistics further illustrate the differentiated development of thermal tourism across the European Union (Table 6). Germany remained by far the largest thermal tourism market, with revenue increasing from USD 7.78 billion to USD 8.51 billion between 2019 and 2024. Among the remaining leading markets, Hungary (+31.9%), Slovakia (+32.1%), and Romania (+23.6%) recorded the strongest overall growth, whereas Spain (-5.0%) and France (-1.5%) had not yet fully recovered to their pre-pandemic revenue levels by 2024. These differences suggest that although thermal tourism exhibits positive long-term development across

Europe, national markets continue to recover at different rates depending on destination characteristics and market conditions.

Table 6. Comparative annual revenue of thermal and mineral springs in the ten largest EU markets, USD billion, 2019–2024

Country	2019	2020	2021	2022	2023	2024
Germany	7.78	4.86	5.17	6.63	7.34	8.51
Italy	1.79	1.01	1.33	1.49	1.71	1.95
Hungary	1.19	0.54	0.74	1.07	1.38	1.57
Austria	0.99	0.66	0.62	0.95	1.08	1.12
Czechia	0.75	0.42	0.39	0.60	0.88	0.91
Poland	0.71	0.47	0.57	0.70	0.83	0.79
Spain	0.80	0.41	0.49	0.67	0.79	0.76
Slovakia	0.53	0.35	0.36	0.46	0.57	0.70
Romania	0.55	0.28	0.31	0.43	0.64	0.68
France	0.68	0.22	0.43	0.52	0.63	0.67

Source: compiled by the authors based on Global Wellness Institute (2025).

The Global Wellness Institute also identifies several structural challenges affecting the future development of spa and thermal tourism in Europe, including rising energy prices, labour shortages, ageing infrastructure, and regulatory constraints. Nevertheless, global projections for 2024–2029 remain highly favourable, with compound annual growth rates of 7.7% for the spa sector and 10.0% for thermal and mineral spring tourism, indicating strong long-term market potential despite current operational challenges. It should be noted, however, that these forecasts refer to global markets rather than specifically to the European Union.

Collectively, these findings provide strong empirical support for the conceptual framework by demonstrating that spa and thermal tourism constitute economically significant and steadily expanding segments of alternative tourism. The observed growth patterns indicate that natural therapeutic resources, specialised infrastructure, and wellness-oriented services are increasingly transformed into high-value tourism products, contributing simultaneously to destination competitiveness, regional economic development, and the diversification of the European alternative tourism market.

4.3. Digital transformation through platform-based accommodation

Digital platforms have become an increasingly important component of contemporary alternative tourism by facilitating flexible, decentralized, and experience-oriented forms of accommodation. The rapid expansion of collaborative economy platforms has significantly increased the accessibility of rural, cultural, coastal, and niche tourism destinations, thereby supporting the diversification of tourism products throughout the EU.

Official Eurostat statistics demonstrate a remarkable increase in platform-based short-stay accommodation during the post-pandemic period. The number of overnight stays booked through collaborative economy platforms increased from 512 million in 2019 to 952 million in 2025, representing an overall growth of 85.9% (Table 7). Although demand declined substantially during the COVID-19 pandemic, falling to 272 million overnight stays in 2020, the sector recovered rapidly, exceeding pre-pandemic levels already in 2022. By 2025, platform-based accommodation had reached an index of 185.9 (2019 = 100), indicating that overnight stays were almost twice as high as before the pandemic. This pattern illustrates not only recovery but also a structural transformation in accommodation preferences among European travellers.

Table 7. Platform-based short-stay accommodation in the EU, 2019–2025

Year	Overnight stays, million	Index, 2019=100
2019	512	100.0
2020	272	53.1
2021	364	71.1
2022	597	116.6
2023	719	140.4
2024	854	166.8
2025	952	185.9

Source: compiled by the authors based on Eurostat (2026b).

The country-level distribution further illustrates the unequal but widespread adoption of collaborative accommodation platforms across the European Union (Table 8). France remained the largest market in 2025 with 213 million overnight stays, followed by Spain (189 million) and Italy (139 million). Together, these three countries accounted for more than half of all overnight stays recorded among the largest national platform markets in the European Union, highlighting the dominant role of Southern and Western European tourism destinations within the collaborative accommodation economy. Germany ranked fourth with 68 million overnight stays, while Greece and Portugal also demonstrated substantial platform activity, reflecting the importance of digital accommodation services in Mediterranean tourism destinations.

Table 8. Overnight stays through collaborative accommodation platforms in the largest EU markets, million, 2025

Country	Overnight stays, million
France	213
Spain	189
Italy	139
Germany	68
Greece	52
Portugal	50
Poland	44
Croatia	42
Austria	25
Belgium	13
Hungary	13
Czechia	12
Netherlands	12
Romania	10

Source: compiled by the authors based on Eurostat (2026b).

The most recent annual statistics also indicate that the market continues to expand rapidly. In 2025, Poland recorded the highest annual growth among the leading markets (+13.8%), followed by Germany (+13.0%), Spain (+11.1%), and France (+10.5%). These results suggest that collaborative accommodation platforms continue to penetrate both mature tourism destinations and emerging regional markets, thereby contributing to the geographical diversification of tourism demand throughout the European Union.

Collectively, these findings provide empirical evidence that digital platforms have become an important enabling mechanism for the expansion of alternative tourism. Rather than simply increasing accommodation capacity, collaborative platforms facilitate access to authentic local experiences, rural destinations, cultural attractions, and niche tourism products that are frequently unavailable through traditional hotel infrastructure.

Consequently, platform-based accommodation contributes to the diversification of tourism supply, enhances destination accessibility, and strengthens the competitiveness of regional tourism systems. Within the proposed conceptual framework, these findings demonstrate how digital innovation functions as an enabling factor connecting changing tourist preferences with the continued expansion of alternative tourism market segments across the EU.

4.4. Rural tourism and agritourism

Rural tourism and agritourism represent important components of alternative tourism by promoting authentic visitor experiences, supporting local communities, and contributing to sustainable regional development. Unlike mass tourism, these forms of tourism emphasize close interaction with rural environments, agricultural traditions, local culture, and regional food systems. Consequently, they play an important role in diversifying tourism products while simultaneously generating additional income opportunities for rural areas.

Official statistics from the Italian National Institute of Statistics (ISTAT) provide one of the most comprehensive longitudinal datasets on agritourism development within the European Union. Between 2014 and 2024, the number of officially registered agritourism farms increased from 21,744 to 26,360, representing an overall growth of 21.2% (Table 9). Despite temporary disruptions associated with the COVID-19 pandemic, the long-term trend demonstrates continuous expansion of the agritourism sector, indicating increasing demand for rural tourism experiences and successful adaptation of agricultural enterprises to tourism activities.

Table 9. Development of agritourism farms in Italy, 2014–2024

Year	Agritourism farms	Status
2014	21,744	Official
2015	22,238	Official
2017	23,406	Official
2020	25,060	Official
2022	25,849	Official
2023	26,129	Official
2024	26,360	Official

Source: compiled by the authors based on ISTAT (2018, 2025).

The long-term perspective provided by ISTAT further illustrates the structural expansion of agritourism within Italy. The number of agritourism establishments increased from just over 14,000 in 2004 to approximately 26,000 by 2022, demonstrating that agritourism has evolved from a relatively niche activity into a well-established component of the national tourism economy. In 2024 alone, Italian agritourism establishments welcomed approximately 4.7 million visitors, representing a 4.3% increase compared with 2023, while the economic value generated by the sector increased by 3.3%. These indicators suggest that the sector continues to expand not only in terms of supply but also in visitor demand and economic performance.

Although Italy provides one of the most reliable official datasets on agritourism in Europe, caution is required when generalising these findings to rural tourism as a whole. According to Eurostat methodology, the most appropriate official proxy for rural tourism at the European level is the number of overnight stays in accommodation establishments located within rural areas according to the DEGURBA classification. However, rural tourism and agritourism are not identical concepts. Agritourism specifically refers to tourism activities directly associated with agricultural enterprises, whereas rural tourism encompasses a broader range of accommodation, recreation, cultural, and nature-based activities located in rural regions. Consequently, these two categories should be analysed separately in empirical research to avoid conceptual and statistical inconsistencies.

Collectively, these findings provide empirical support for the conceptual framework by demonstrating that agritourism constitutes a steadily expanding segment of alternative tourism that contributes simultaneously to tourism diversification, rural economic development, and sustainable destination management. The continuous

increase in the number of agritourism enterprises, visitor arrivals, and economic value illustrates how rural resources and agricultural heritage are increasingly transformed into competitive tourism products responding to growing demand for authentic, locally embedded, and sustainability-oriented travel experiences. Moreover, the distinction between agritourism and rural tourism reinforces the conceptual framework by highlighting the multidimensional nature of alternative tourism, where related but distinct market segments coexist within a broader tourism ecosystem rather than forming a single homogeneous category.

4.5. Nature-based tourism

Nature-based tourism constitutes one of the fastest-growing segments of alternative tourism, reflecting the increasing importance of environmental sustainability, outdoor recreation, and authentic experiences in contemporary tourist behaviour. National parks and protected areas play a central role in this market by simultaneously supporting biodiversity conservation, regional development, and visitor well-being. Consequently, nature-based tourism represents an important intersection between environmental protection and sustainable tourism development.

Finland provides one of the most comprehensive official longitudinal datasets for analysing the development of nature-based tourism within Europe. According to Metsähallitus, annual visits to Finnish national parks increased from approximately 2.6 million in 2015 to more than 3.5 million in 2025, representing an overall increase of more than 35% during the study period (Table 10). Visitor numbers grew steadily until 2019, followed by a temporary peak of approximately 4 million visits in both 2020 and 2021. This exceptional increase was largely associated with the COVID-19 pandemic, when restrictions on international travel stimulated domestic demand for outdoor recreation and nature-oriented tourism. Although visitation declined slightly after the pandemic, the number of visitors remained substantially above the pre-pandemic level, indicating a lasting increase in interest in nature-based tourism rather than a temporary behavioural change.

Table 10. Visits to Finnish national parks, 2015–2025

Year	Visits, million	Note
2015	2.6	Official annual series (rounded)
2016	2.8	Official annual series (rounded)
2017	3.1	Official annual series (rounded)
2018	3.2	Official annual series (rounded)
2019	3.2	Official annual series (rounded)
2020	4.0	Official annual series (rounded)
2021	4.0	Official annual series (rounded)
2022	3.6	Official annual series (rounded)
2023	3.6	Official annual series (rounded)
2024	3.6	Official annual series (rounded)
2025	3.5	Official annual series (rounded)

Source: compiled by the authors based on Metsähallitus (2025a).

An even more important finding concerns the economic contribution of nature-based tourism. During the same period, the estimated local economic impact generated by Finnish national parks increased from €142 million in 2015 to €277.9 million in 2025, corresponding to an increase of approximately 96%. The economic impact therefore expanded almost three times faster than visitor numbers, suggesting that growth was driven not only by increasing visitation but also by higher visitor expenditure, greater consumption of local tourism services, and stronger regional economic multiplier effects. These findings indicate that protected natural areas generate increasing economic value while maintaining their primary environmental functions.

Table 11. Nature-based tourism and local economic impact in Finnish national parks

Indicator	2015	2025	Change
National park visits, million	2.6	3.5	>35%
Local economic impact, € million	142.0	277.9	≈96%

Source: compiled by the authors based on Metsähallitus (2025b).

These results demonstrate that nature-based tourism contributes not only to increasing visitor numbers but also to improving regional economic performance. The substantially faster growth of economic impact relative to physical visitation indicates higher tourist spending and greater value creation for local communities, thereby illustrating the increasing economic efficiency of protected-area tourism. Such findings provide empirical evidence that investments in natural capital and sustainable destination management can simultaneously generate environmental, social, and economic benefits.

Collectively, these findings provide strong empirical support for the conceptual framework by demonstrating how natural resources are transformed into sustainable tourism products that generate measurable multidimensional outcomes. The continuous growth of visitor numbers, together with the disproportionately larger increase in regional economic benefits, illustrates the interaction between destination resources, changing tourist preferences for nature-oriented experiences, and sustainable regional development. Consequently, nature-based tourism represents one of the clearest examples of how alternative tourism contributes simultaneously to environmental conservation, economic resilience, and the long-term competitiveness of tourism destinations.

4.6. Pilgrimage and spiritual tourism

Pilgrimage and spiritual tourism represent one of the oldest yet continuously evolving segments of alternative tourism. While historically associated primarily with religious practice, contemporary pilgrimage increasingly combines spiritual reflection, cultural heritage, personal development, and experiential travel. Consequently, pilgrimage tourism occupies an important position within the broader system of alternative tourism by integrating spiritual motivations with cultural, wellness, and transformational travel experiences.

Among European pilgrimage destinations, the Camino de Santiago provides the most comprehensive official longitudinal dataset for analysing long-term development trends. According to the Pilgrim's Reception Office of the Cathedral of Santiago de Compostela, the number of pilgrims receiving the Compostela certificate increased from 183,366 in 2011 to 530,987 in 2025, representing almost a 2.9-fold increase over the study period (Table 12). Excluding the exceptional decline during the COVID-19 pandemic in 2020, the data reveal a remarkably stable long-term upward trend. Compared with the last pre-pandemic year (2019), the number of registered pilgrims increased by 52.8%, indicating that pilgrimage tourism has not only recovered but has substantially exceeded its previous level of development.

Table 12. Registered pilgrims receiving the Compostela certificate on the Camino de Santiago, 2010–2025

Year	Registered pilgrims	Index, 2010=100
2010	272,135	100.0
2011	183,366	67.4
2012	192,488	70.7
2013	215,880	79.3
2014	237,886	87.4
2015	262,516	96.5
2016	277,854	102.1
2017	301,036	110.6
2018	327,378	120.3
2019	347,578	127.7

Year	Registered pilgrims	Index, 2010=100
2020	54,144	19.9
2021	178,912	65.7
2022	438,307	161.1
2023	446,035	163.9
2024	499,239	183.5
2025	530,987	195.1

Source: compiled by the authors based on Cathedral of Santiago de Compostela (2026).

The broader European context demonstrates that the expansion of pilgrimage tourism is not limited to the Camino de Santiago. Official statistics from several of Europe's largest pilgrimage destinations reveal consistently high visitor numbers across different countries (Table 13). The Sanctuary of Lourdes welcomed 3.2 million pilgrims in 2024, while the Shrine of Fátima received 6.5 million visitors in 2025, making it one of the world's largest pilgrimage destinations. Similarly, Poland's Jasna Góra sanctuary attracted 4.2 million pilgrims in 2025, following steady annual growth from 2.5 million visitors in 2022. These data demonstrate that large-scale pilgrimage flows are characteristic of multiple European destinations rather than representing an isolated phenomenon associated with a single pilgrimage route.

Table 13. Visitor numbers at selected European pilgrimage destinations

Pilgrimage centre	Year	Pilgrims/visitors, million
Lourdes (France)	2021	1.6
Lourdes (France)	2022	2.7
Lourdes (France)	2023	3.1
Lourdes (France)	2024	3.2
Fátima (Portugal)	2024	6.2
Fátima (Portugal)	2025	6.5
Jasna Góra (Poland)	2022	2.5
Jasna Góra (Poland)	2023	3.6
Jasna Góra (Poland)	2025	4.2

Source: compiled by the authors based on official statistics of Lourdes, Fátima and Jasna Góra sanctuaries.

The long-term expansion observed across these destinations suggests that pilgrimage tourism has become an increasingly significant component of the contemporary European tourism market. While religious motivations remain fundamental for many pilgrims, the sustained growth of pilgrimage routes and sacred destinations also reflects broader social trends, including the search for authenticity, personal meaning, cultural identity, mindfulness, and transformative travel experiences. These motivations increasingly overlap with those characterising wellness tourism, retreat tourism, and other forms of alternative tourism, thereby illustrating the growing interconnectedness of alternative tourism market segments.

Collectively, these findings provide strong empirical support for the conceptual framework by demonstrating that pilgrimage and spiritual tourism constitute dynamic and expanding segments of alternative tourism rather than static forms of traditional religious travel. The continuous increase in pilgrimage flows across multiple European destinations illustrates how changing tourist motivations are translated into measurable market growth while simultaneously contributing to cultural heritage preservation, regional economic development, and the diversification of tourism products. These results further support the conceptualisation of alternative tourism as an integrated system of interconnected market segments responding to evolving demands for meaningful, authentic, and transformative travel experiences.

The empirical evidence presented in this section provides strong support for the proposed conceptual framework of alternative tourism. Although the EU does not maintain a single official statistical category for alternative

tourism, the consistent expansion observed across multiple independent market segments—including wellness tourism, spa and thermal tourism, platform-based accommodation, agritourism, nature-based tourism, and pilgrimage tourism—demonstrates that alternative tourism constitutes a measurable and rapidly developing component of the contemporary tourism economy. The analysed datasets reveal common development patterns despite differences in tourism products, destinations, and statistical indicators. In particular, the sustained growth in visitor numbers, tourism expenditure, accommodation demand, and regional economic impacts indicates that the diversification of alternative tourism is driven by changing tourist motivations, including increasing demand for health and well-being, authenticity, sustainability, nature-based experiences, spirituality, and personal transformation. At the same time, the empirical findings demonstrate that destination-specific natural, cultural, and digital resources are increasingly being transformed into competitive tourism products that generate measurable economic, social, and environmental outcomes. Consequently, the results confirm the central proposition of the conceptual framework that alternative tourism should be understood not as a collection of isolated niche activities but as an integrated and interconnected system of tourism market segments whose simultaneous development reflects the broader structural transformation of tourism across the EU.

Beyond the currently established market segments, the empirical evidence also suggests further diversification of alternative tourism through the emergence of digital and virtual tourism. Although this segment cannot yet be incorporated into the main empirical analysis because available market estimates are based on different product definitions and are therefore not directly comparable with official tourism statistics, existing industry forecasts indicate considerable future growth potential. Global Market Insights (n.d.) estimates the virtual tourism market at USD 0.729 billion in 2023 with a projected compound annual growth rate (CAGR) of 26.4% through 2032, while Grand View Research (2025) estimates the market at USD 8.05 billion in 2024 and forecasts expansion to USD 30.54 billion by 2030 (CAGR 24.9%). Despite substantial differences in market size resulting from alternative methodological approaches, both forecasts consistently indicate rapid expansion of digitally enabled tourism experiences. Consequently, virtual tourism should be regarded as an emerging component of alternative tourism that may complement rather than replace traditional travel, extending opportunities for destination interpretation, cultural experiences, education, and accessibility. From the perspective of the proposed conceptual framework, digital and virtual tourism represents a prospective market segment whose future development is likely to further increase the diversification, resilience, and innovation capacity of alternative tourism in the European Union, while requiring separate methodological approaches for empirical assessment due to the current lack of harmonised official statistics.

5. Conclusions

This study examined the development of alternative tourism in the EU by integrating conceptual analysis with empirical evidence from multiple measurable tourism segments. Building upon systems theory, sustainable tourism, and tourism diversification literature, the study proposed a conceptual framework that interprets alternative tourism as an integrated system of interconnected market segments driven by changing tourist motivations, destination resources, and sustainability-oriented tourism management. Unlike traditional approaches that examine individual tourism forms separately, the proposed framework conceptualizes alternative tourism as a dynamic tourism ecosystem in which wellness, spa and thermal, rural, nature-based, platform-based, pilgrimage, spiritual, and other specialized tourism forms interact and collectively contribute to the structural transformation of the contemporary tourism industry.

The empirical analysis provides consistent evidence supporting this conceptualization. Although alternative tourism is not recognised as an independent statistical category within official European tourism statistics, the analysis demonstrates sustained expansion across all principal measurable market segments. Wellness tourism exhibited strong growth in tourist expenditure and visitor spending; spa and thermal tourism continued to expand despite relatively stable infrastructure; collaborative accommodation platforms experienced rapid growth in overnight stays; agritourism and nature-based tourism demonstrated increasing economic importance for rural and protected areas; while pilgrimage tourism showed substantial long-term growth across major European pilgrimage destinations. Considered together, these independent datasets demonstrate that alternative tourism has evolved beyond a collection of isolated niche activities into a diversified and economically significant component of the European tourism market.

The findings also confirm that the development of alternative tourism reflects broader structural changes in tourism demand. Across different market segments, tourists increasingly seek experiences associated with health and well-being, authenticity, environmental sustainability, cultural immersion, spirituality, personal development, and meaningful engagement with destinations. Simultaneously, destinations increasingly transform natural, cultural, agricultural, spiritual, and digital resources into specialized tourism products that generate measurable economic, social, environmental, and individual outcomes. These common development patterns observed across otherwise distinct tourism segments provide empirical support for the systems-based interpretation proposed in the conceptual framework.

Beyond documenting current market dynamics, the study also identifies important future development prospects. The continued expansion of wellness-related tourism, increasing digitalisation of tourism services, growth of collaborative accommodation platforms, and the emergence of virtual tourism indicate that the diversification of alternative tourism is likely to continue. Although digital and virtual tourism cannot yet be directly integrated into official tourism statistics because of inconsistent market definitions and measurement approaches, available industry forecasts suggest that these technologies may become increasingly important complements to physical travel through destination interpretation, education, cultural engagement, accessibility, and pre-visit experience design. Consequently, the future evolution of alternative tourism is expected to combine traditional place-based experiences with new digitally enabled forms of tourism consumption.

From a theoretical perspective, the principal contribution of this study lies in developing an integrated conceptual framework that bridges the fragmented literature on alternative tourism. Rather than analysing wellness tourism, rural tourism, pilgrimage tourism, or other specialized forms independently, the study demonstrates their conceptual interrelationships within a unified systems perspective. This contributes to a clearer understanding of alternative tourism as a multidimensional tourism ecosystem characterised by overlapping market segments, common sustainability principles, and interconnected development processes.

The study also makes an empirical contribution by demonstrating how alternative tourism can be analysed despite the absence of a single official statistical category. By combining official statistics, institutional datasets, and country-level evidence from multiple tourism segments, the proposed methodological approach provides a practical framework for assessing the development of alternative tourism at both European and national levels. This multidimensional measurement approach may also be applicable to comparative studies in other world regions where alternative tourism similarly lacks harmonised statistical classification.

Several limitations should be acknowledged. First, the empirical analysis relies primarily on secondary data compiled from multiple official and institutional sources that differ in statistical methodology, geographical coverage, and reporting practices. Second, some emerging tourism forms, particularly digital and virtual tourism, currently lack harmonised statistical indicators and therefore cannot be directly compared with traditional tourism measures such as visitor numbers or overnight stays. Third, the study adopts a descriptive and conceptual approach rather than econometric modelling and therefore does not attempt to establish causal relationships between tourist motivations, destination characteristics, and market outcomes.

Future research could extend the proposed framework by developing composite indicators capable of measuring alternative tourism as an integrated market, applying multivariate statistical techniques to analyse relationships among different tourism segments, and undertaking comparative analyses across European regions and other international destinations. Additional research may also examine the growing interactions between digital technologies, artificial intelligence, smart destinations, and alternative tourism, as well as investigate how hybrid tourism products combining wellness, nature-based, cultural, and spiritual experiences continue to reshape tourism development. Such studies would further improve understanding of alternative tourism as one of the principal directions of sustainable and resilient tourism development in the twenty-first century.

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