

Article

The Sustainability of Global Cultural Brands: Territorial Marketing, Internationalisation of Demand and Governance Challenges Along the Way of St James

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Abstract

The Camino de Santiago is one of the most important cultural routes in the world and a privileged laboratory for analysing the challenges of sustainability in long-distance heritage destinations. The aim of this research is to understand the underlying dynamics of the Way, as well as its degree of sustainability. To achieve this, we examine the recent evolution of tourist demand for the Way from a territorial and sustainability perspective, integrating official statistical data with digital interest indicators from Google Trends (2004–2025). The methodology combines quantitative analyses of trends, seasonality, spatial diversification and internationalisation of demand, applying robust techniques such as the Theil–Sen slope and the Mann–Kendall test. The results show structural growth and high resilience of the Jacobean tourism system, even after the disruption caused by COVID-19, together with a growing internationalisation of flows. However, this tourism success is accompanied by strong spatial and temporal imbalances, with a marked concentration on the French Way and in the summer months, which increases environmental and social pressure on the most travelled territories. The analysis of digital interest also reveals a progressive decline in the importance of Holy Years as a driving force for attraction, especially in international markets.

Keywords: Camino de Santiago; sustainable tourism; territorial governance; cultural routes; digital demand analysis



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1. Introduction

The Camino de Santiago (Figure 1) is one of the most paradigmatic examples of a cultural itinerary that has become part of global heritage and one of the most complex phenomena in the field of contemporary cultural and religious tourism. This network of itineraries, among which the French Way stands out for its length and monumental sequence, was also historically a hub of cultural, social and economic exchange beyond its original religious significance. Its historical configuration as a European pilgrimage network, which emerged in the Early Middle Ages from the cult of St James the Apostle [1,2], has evolved into a multifunctional territorial system in which mobility, heritage, tourism, identity and local development converge.

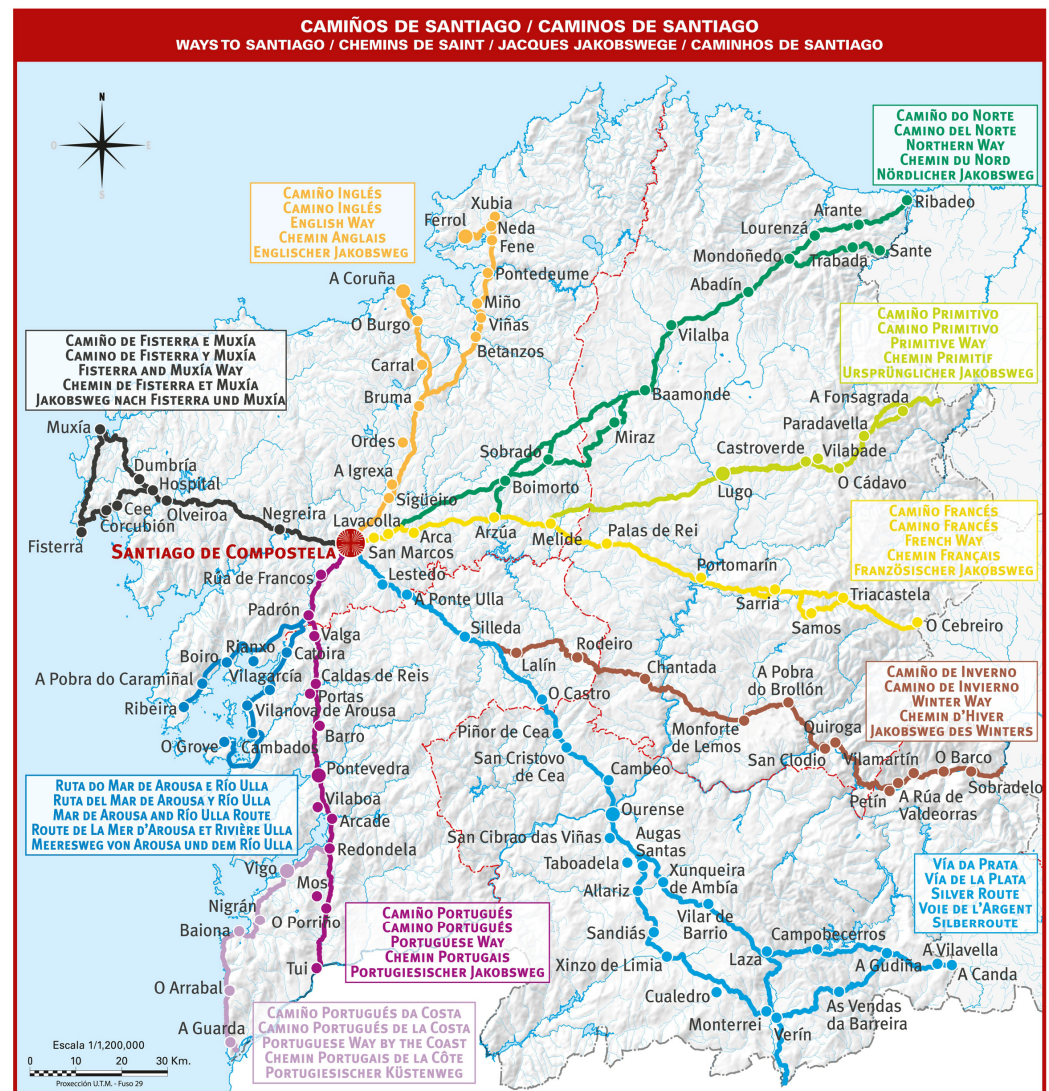


Figure 1. Official map of the Camino de Santiago prepared by the Xunta de Galicia for the Galician routes (Escala: Scale). Source: <https://share.google/PTbyYq7Gh4jX6SCwy> (accessed on 15 March 2026).

The socio-cultural revitalisation of the Camino de Santiago from the second half of the 20th century onwards marked a turning point in its configuration as a tourist resource, in a process initially driven by both public and private initiatives aimed at promoting this historic route as cultural heritage and as an instrument for boosting local and regional development. The first attempts at recovery took place during the Franco period, as part of a propaganda strategy aimed at reinforcing a Catholic and conservative memory in line with the dominant ideology of Spain at the time [3]. Subsequently, between the Holy Years of 1965 and 1976, the actions of various agents committed to the recovery of the Jacobean itinerary took on special relevance. This group was made up of both researchers interested in reconstructing and disseminating the historical memory of the pilgrimage to Santiago—mainly historians, philologists and archivists—and members of the clergy motivated by their direct experience of the Camino, in many cases combining both dimensions [4,5]. It was in this context that the first associations of friends of the Camino de Santiago emerged, organisations that have played a central role in the preservation and dissemination of an idealised vision of the traditional pilgrimage, constructing a discourse with a notable influence on the social perception of the phenomenon [5–7].

The international profile of the Camino de Santiago experienced significant expansion as a result of the promotional campaign launched by the Xunta de Galicia on the occasion of the Holy Year of 1993, considered a key milestone in its consolidation as a global tourist destination. Likewise, the publishing market contributed significantly to the dissemination of the Camino through the publication of autobiographical and travel narrative works, notably those by Paulo Coelho (1987), C. Nooteboom (1996), Shirley MacLaine (2001), H. Kerkeling (2006) and Kim Hyo Sun (2011), in which the authors recount their personal experiences of pilgrimage. The influence of these publications has been particularly significant in source markets such as Brazil, Germany and Korea, a phenomenon that has begun to be analysed from an academic perspective [5]. Finally, the representation of the Camino de Santiago and the city of Santiago de Compostela in the field of cinema has reinforced its international visibility, with productions such as *The Way* (2010) contributing significantly to the construction and dissemination of the image of the Camino de Santiago in tourist demand markets, especially in the international context.

The evolution of pilgrim numbers reflects the growing popularity of the Camino as a tourist product. Since the 1980s, interest in this route has resurged, with an estimated 170,000 people walking the Camino each year [8]. Currently, in 2025, according to statistics from the Pilgrim Reception Office, 530,101 pilgrims were officially certified, representing an increase of 194.71% since 2004 and breaking all attendance records. Within this volume, the presence of walkers from more than 180 countries stands out. However, this phenomenon is not unique to the Camino de Santiago. Other pilgrimage routes around the world have gained global tourist relevance, albeit with very different stopovers [7]. The Hajj, the annual sacred pilgrimage to Mecca (Saudi Arabia), attracts millions of pilgrims every year. according to Saudi statistical sources (General Authority for Statistics), in 2025 there were 1,673,230 pilgrims, of whom 90% were foreigners, with 1,506,576 pilgrims arriving through various entry points. The Kumano Kodo sacred paths in Japan have undergone their own tourism development focused on spirituality, landscape and cultural experience. In the European context, historic routes such as the Via Francigena, which connects Canterbury (UK) with Rome (Italy), have been revitalised as cultural pilgrimage and long-distance tourism itineraries, attracting tens of thousands of walkers annually.

From a territorial perspective, the Camino de Santiago has been analysed as an instrument of local and regional development, particularly in rural areas affected by depopulation and economic decline, stimulating sectors such as accommodation, catering and cultural services, although it also generates pressure on infrastructure and community resources during periods of peak visitor numbers. In this sense, the Jacobean route has acted as one of the main axes of organisation for domestic tourism in Galicia, redistributing flows and economic opportunities to traditionally marginal areas. However, it should be noted that these positive impacts are not distributed evenly, but rather respond to logics of accessibility, urban hierarchy and tourist accommodation capacity. In this sense, the Camino de Santiago must be analysed as a continuous territorial system, avoiding fragmented approaches based exclusively on administrative boundaries. The management of the Camino requires supra-municipal policies capable of integrating heritage conservation, tourism planning and rural development. This vision is in line with contemporary approaches to territorial governance, which emphasise multi-scale coordination and the participation of local actors [9].

The growing influx of pilgrims has also sparked intense debate about the environmental impact of the Camino de Santiago. Although pilgrimage on foot is symbolically associated with values of sustainability and low impact, various studies warn of the cumulative effects of overcrowding, pressure on historic trails and cultural landscapes, and the increase in waste and consumption associated with [10]. From this perspective, concepts

such as carrying capacity and overtourism become relevant when analysing the management of the Camino de Santiago and especially the city of Santiago de Compostela [11].

Traditionally, Holy Years have been considered the main driver of increased tourist demand, acting as extraordinary events capable of concentrating flows and justifying specific public investments. However, recent empirical evidence and academic literature suggest that the explanatory weight of these religious cycles has been progressively relativised. In fact, the sustained growth of pilgrims in non-Jacobean years can be considered an indicator of the maturity of the tourist product, reinforced by improved infrastructure, the professionalisation of the offer and its insertion into global cultural tourism networks. Likewise, studies on mobility and tourist experience have highlighted that the appeal of the Camino is increasingly based on values associated with slow walking, the landscape and personal experience, elements that do not necessarily depend on the Holy Year [12–15]. This evolution helps to explain the progressive deseasonalisation of demand and the relative reduction in the differential impact of Holy Years.

2. Literature Review

This study is grounded in several interconnected theoretical frameworks that inform the analysis of the Camino de Santiago as a sustainable cultural tourism destination. First, the conceptualization of the Camino as a mature tourist destination draws on [16]. Tourism Area Life Cycle (TALC) model. According to this model, destinations evolve through exploration, involvement, development, consolidation, and stagnation phases. The sustained growth, market diversification, and high international recognition of the Camino suggest it is in a consolidation or even stagnation phase, where managing carrying capacity and rejuvenation or decline becomes critical. The resilience of the Camino, evidenced by its rapid post-COVID-19 recovery, is a characteristic of mature destinations with strong brand equity and diversified markets. This resilience, however, is not synonymous with sustainability, as it can mask underlying environmental and social pressures.

Second, the analysis of demand dynamics is framed by theories of tourist motivation and mobility. The shift from primarily religious motivations towards secular-spiritual, experiential, and sport-related travel aligns with broader trends in experiential tourism [14,15]. Concepts such as overtourism and carrying capacity [10,11] are central to understanding the negative impacts of spatial and temporal concentration. Seasonality, a key challenge identified in this study, leads to systemic inefficiencies and environmental stress, concepts well-documented in sustainable tourism literature [10]. The internationalisation of demand, while economically beneficial, introduces the challenge of the carbon footprint associated with long-haul travel, creating a direct tension with climate action goals [17].

Third, the governance of the Camino is examined through the lens of territorial governance and multi-level coordination [9]. The route's nature as a continuous territorial system that transcends administrative boundaries necessitates integrated policies that go beyond municipal fragmentation. This framework highlights the need for collaboration among diverse stakeholders—national and regional governments, local communities, and pilgrimage associations—to manage flows, conserve heritage, and ensure equitable distribution of benefits. The concept of demarketing, or using marketing to discourage tourism during peak times or in congested areas, emerges as a potential, albeit challenging, governance tool [18].

Fourth, the integration of digital interest indicators as a proxy for destination image and potential demand is a novel methodological contribution. This approach is situated within the growing field of tourism analytics and big data, where tools like Google Trends are used to forecast demand, monitor destination perception, and complement traditional statistics [19]. The analysis of online search behaviour provides an unobtrusive measure of

global cultural positioning and can reveal mismatches between marketed image and actual tourist interest.

Finally, this research is explicitly aligned with the Sustainable Development Goals (SDGs), particularly SDG 8 (Decent Work and Economic Growth), SDG 10 (Reduced Inequalities), SDG 11 (Sustainable Cities and Communities), and SDG 13 (Climate Action). The analysis seeks to evaluate the Camino's performance not just in terms of economic growth, but also its contribution to territorial cohesion and its environmental impact, thereby adopting a holistic view of sustainability.

3. Materials and Methods

This study adopts a quantitative-exploratory approach aimed at analysing the dynamics of tourist demand on the Camino de Santiago and its relationship with territorial sustainability. Firstly, secondary data from the Pilgrim Reception Office and the Galician Tourist Board for the period 2004–2025 have been used. These sources allow us to analyse the evolution of the number of certified pilgrims, their distribution by itinerary, geographical origin and seasonality, as well as the number of overnight stays in public hostels in the Xacobeo Network. This period was chosen due to the homogeneous availability of data and the possibility of observing long-term structural trends, including phases of growth, disruption (COVID-19) and recovery.

Secondly, an analysis of online search interest through Google Trends has been incorporated as a proxy for the global positioning of the Camino de Santiago and the evolution of potential demand. The term analysed in search engines was “Camino de Santiago” and its respective translations and compositions. This term was used for two reasons. Firstly, because it is the official term used by the Galician Tourism Agency, the regulatory body for tourism management and the main promoter of the destination. Secondly, because it is an intermediate element between the simplification of “El camino”/“The Way” which, although it refers on multiple occasions to the Camino de Santiago itself, can generate distortions in the representation of the results. On the other hand, the terms “Camino de Santiago de Compostela” or “Camino de Santiago Apóstol” proved to be too long and not very representative. It was logically considered that the combination of words “Camino de Santiago” was clear enough to consider that the results obtained represented searches for our research object.

The comparative searches were carried out on 9 November 2025 with the following parameters:

- Search term;
- Worldwide;
- From 2004 to today;
- Web searches.

Languages were selected based on the number of speakers worldwide where Google Trends and the Camino are relevant. Therefore, Hindi and Arabic were excluded from the most widely spoken languages. An analysis was carried out on the terms Camino de Santiago in Spanish, Galician, Portuguese, English and French. The common English and French terms “St” and “Saint” were removed from the search because they added another word to the search engine and therefore reduced the total number of searches in English and French. However, to ensure that this was not a methodological error, a comparative search was carried out on the one hand for “Chemin de Jacques” and “Chemin de Saint Jacques” and, on the other hand, for “Way of James” and “Way of St James”, showing correlations between the terms. Finally, the terms analysed were as follows:

- Caminho de Santiago (Portuguese);
- Way of James (English);

- Chemin de Jacques (French);
- Camiño de Santiago (Galician);
- Camino de Santiago (Spanish).

The analysis was structured on two levels. On the one hand, the evolution of global interest over time was examined using robust trend analysis, applying the Theil–Sen slope and the non-parametric Mann–Kendall test to the monthly series. This approach allows significant long-term trends to be identified while minimising the influence of outliers and the marked seasonality of the phenomenon. GenIA provided support for the creation of some of these graphics and the statistical program used was R v4.3.

It should be acknowledged that Google Trends provides normalized indices instead of absolute search volumes, which constrains direct quantitative comparisons between markets. Furthermore, potential ambiguity in search terms may introduce minor distortions, although the selected expressions were chosen to minimise references unrelated to the Camino de Santiago.

4. Dynamics of Demand on the Camino de Santiago and Territorial Sustainability: Results and Discussion

The analysis of the evolution of demand on the Camino de Santiago allows us to interpret this cultural itinerary as a complex territorial tourism system, whose sustainability depends on the interaction between visitor flows, public infrastructure, territorial marketing strategies and governance mechanisms. The analysis of tourist demand has been carried out not only as an indicator of growth, but also as a key variable for assessing long-term environmental, social and economic impacts [16].

Figure 2 shows the evolution of the number of pilgrims on the main routes of the Camino de Santiago between 2004 and 2025. The sustained growth trend, with a temporary interruption associated with the COVID-19 pandemic and a rapid subsequent recovery, is an empirical indicator of the resilience of the tourism product. Between 2004 and 2025, there has been a notable increase in the total number of certified pilgrims, from 179,870 pilgrims in 2004 to half a million in 2025. This behaviour has not been linear: Holy Years (Xacobeos) have acted as significant drivers of demand, as seen in 2004 and 2010 (272,385 pilgrims). After a period of gradual growth since 2004, the outbreak of the COVID-19 pandemic in 2020 caused a sharp drop to 54,144, followed by a gradual recovery in 2021 with 178,912 pilgrims (also a Holy Year) and a subsequent strong rebound. In 2022, the threshold of 400,000 pilgrims was exceeded again, and in 2025 a historic record number of pilgrims was reached, representing almost continuous growth in the long term, with occasional adjustments due to exceptional global circumstances.

However, the figure also shows a strong concentration of demand on certain itineraries, especially the French Way. In fact, the French Way continues to dominate as the busiest route (242,180 pilgrims in 2025), accounting for almost half of the total for that year. However, other routes have gained significant ground. The central Portuguese Way recorded 100,835 pilgrims, consolidating its position as the second most popular option, and the Portuguese Way along the coast has also shown significant growth in recent years, although with comparatively lower figures (89,509 pilgrims in 2025). This uneven diversification of routes requires flow distribution strategies to mitigate pressure on the most popular itineraries with the potential risk of exceeding the territorial carrying capacity. This result is particularly relevant as it highlights the need for policies aimed at a more balanced spatial redistribution of tourist flows to mitigate pressure on the most popular itineraries.

The evolution of the number of nights spent in public hostels in the Xacobeo Network between 2010 and 2025 (Figure 3) reflects a structural trend of growth in demand, only abruptly interrupted by the COVID-19 health crisis. The rapid subsequent recovery to

pre-pandemic levels in the last years of the period analysed highlights the high resilience of the Camino de Santiago as a tourist and cultural system. This indicator makes it possible to assess the extent to which demand translates into actual stays and socio-economic benefits distributed throughout the territory. On another note, this sustained increase in overnight stays in the public network of hostels intensifies pressure on collective infrastructure, with direct implications in terms of resource consumption, waste generation, and water and energy management. From a social perspective, the increase in demand reinforces the role of public hostels as key elements in ensuring the economic accessibility and territorial cohesion of the destination, especially in rural areas. In this context, the results highlight the need to move towards more sustainable management models that integrate criteria of environmental efficiency, spatial redistribution of flows and improvement of the quality of the pilgrim's experience.

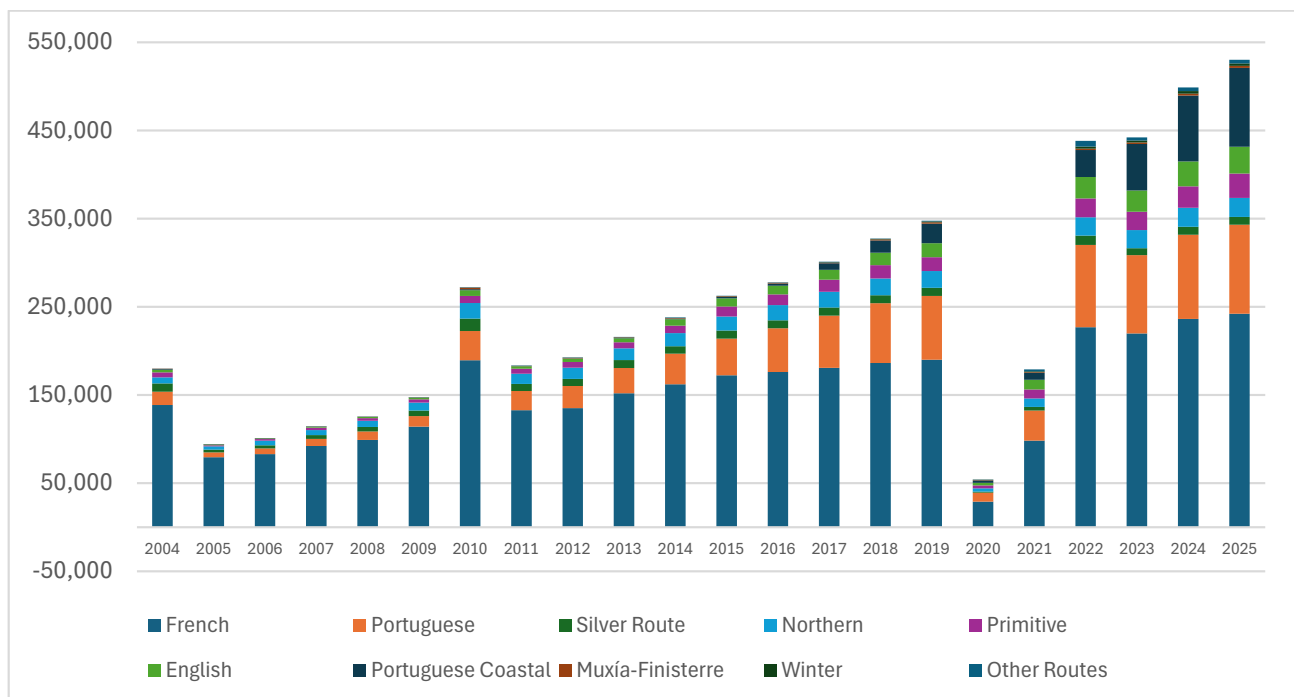


Figure 2. Evolution of the number of pilgrims on the main routes of the Camino de Santiago. Period 2004–2025. Unit: number of pilgrims. Source: Prepared internally based on data from the Pilgrim Reception Office.

The structural dimension of demand is reinforced by the analysis by origin (Figure 4). The evolution of the number of national and international pilgrims between 2004 and 2025 shows an advanced process of internationalisation of the Camino de Santiago. International flows currently account for more than 50% of all pilgrims. This pattern has reinforced the visibility and global competitiveness of the destination, but it also poses significant challenges in terms of environmental sustainability, especially due to the potential increase in the carbon footprint associated with long-distance travel.

Market diversification is analysed in greater detail in Figure 5, which shows the evolution of the number of pilgrims from the main international markets between 2004 and 2025, including geographically distant countries such as South Korea and New Zealand. All markets show sustained growth during the period, with a sharp drop in 2020, coinciding with the COVID-19 pandemic. The behaviour of the flows suggests that the international projection of the Camino has strengthened significantly in the last two decades, with comparable growth rates between consolidated and emerging markets. This diversification reduces the economic vulnerability of the destination to regional crises, but requires constant

adaptation of the tourism product and communication strategies. The success of this route lies in the fact that current demand combines the motivations of pilgrimage, where religious motivations are the least important, with the main motivations being spiritual in nature, the desire for new experiences and contact with nature and sport [14,20,21].

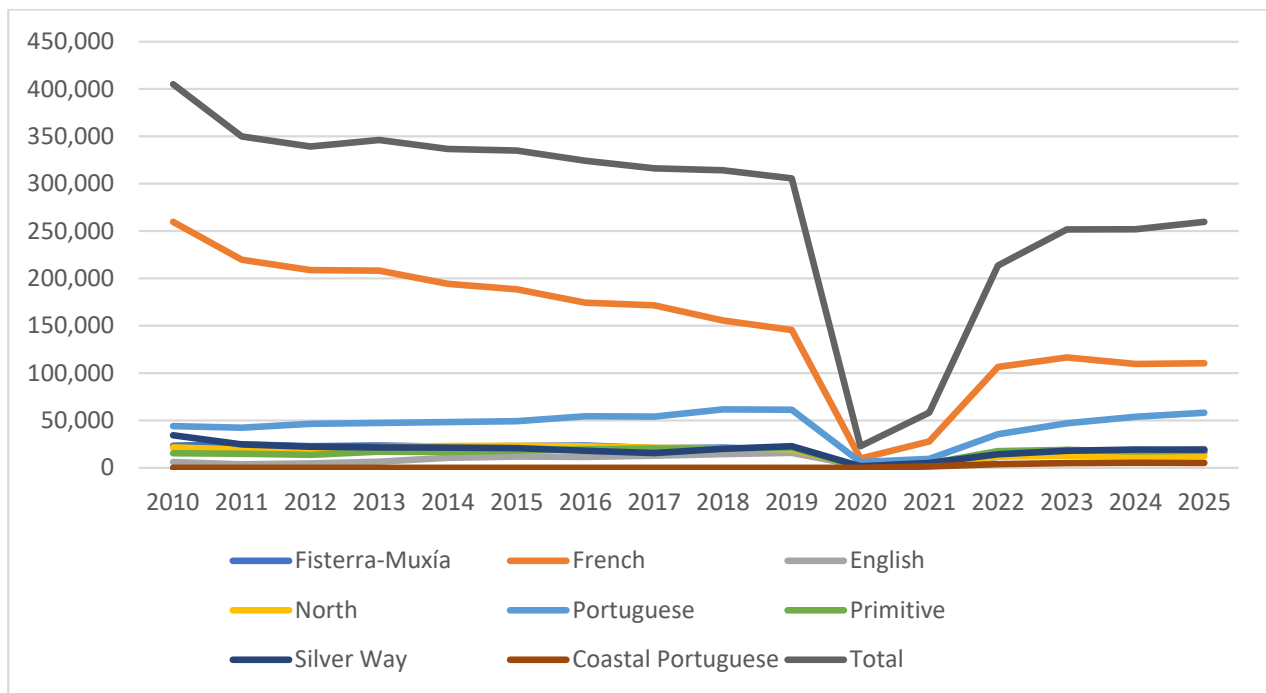


Figure 3. Evolution of the number of nights in public hostels in the Xacobeo Network on the main routes of the Camino de Santiago. Period 2010–2025. Unit: number of nights. Source: Own elaboration based on data from Turismo de Galicia.

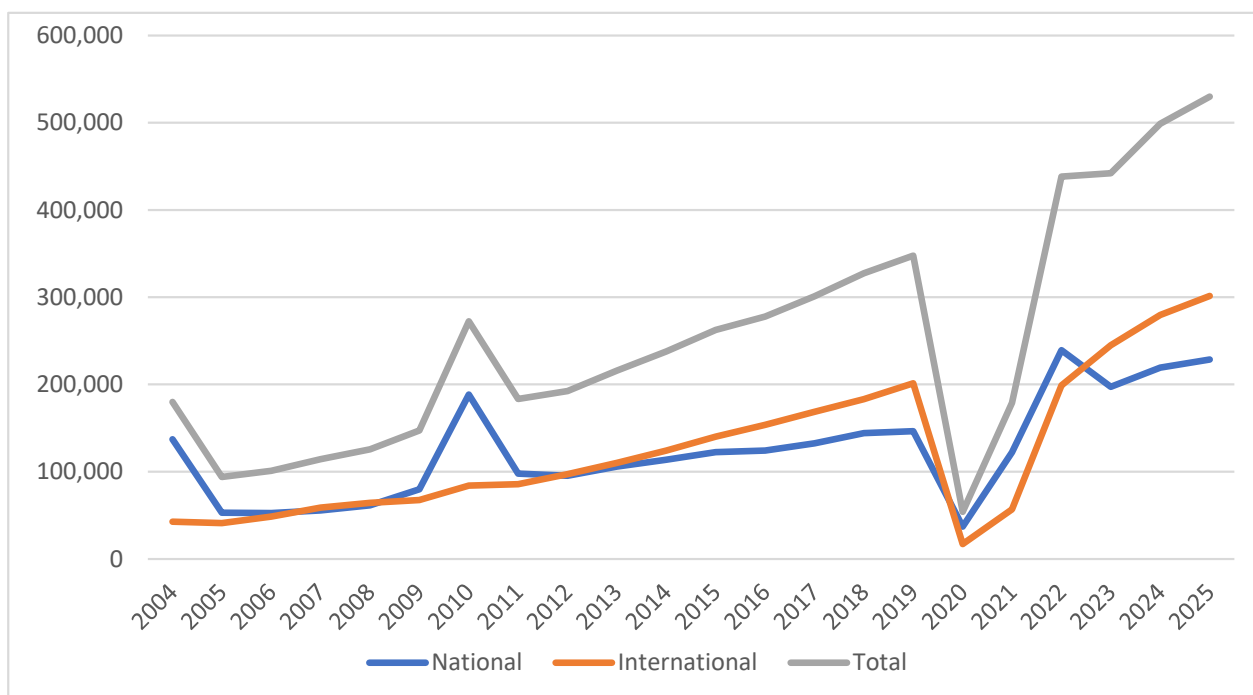


Figure 4. Evolution of the number of pilgrims on the Camino de Santiago by origin: national and international. Period 2004–2025. Unit: number of pilgrims. Source: Own elaboration based on data from the Pilgrim Reception Office.

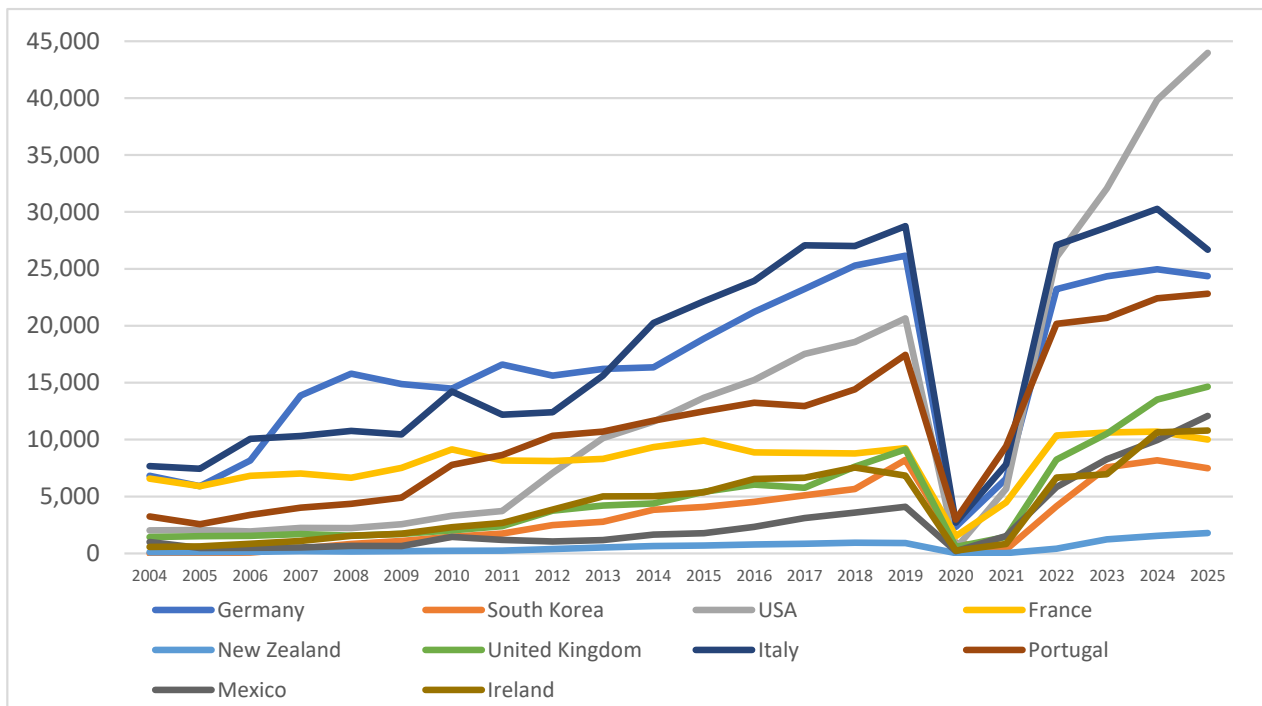


Figure 5. Evolution of the number of pilgrims on the Camino de Santiago from the eight main markets of origin in 2025, South Korea and New Zealand. Period 2004–2025. Unit: number of pilgrims. Source: Own elaboration based on data from the Pilgrim Reception Office.

The seasonal dimension of demand is addressed in Figure 6, which reflects the monthly evolution of the number of pilgrims on the most frequented routes between 2022 and 2025, revealing a very marked seasonality, with maximum concentrations in the summer months. This pattern is a direct indicator of environmental pressure, tourist congestion and potential deterioration in the quality of the experience for both visitors and residents.

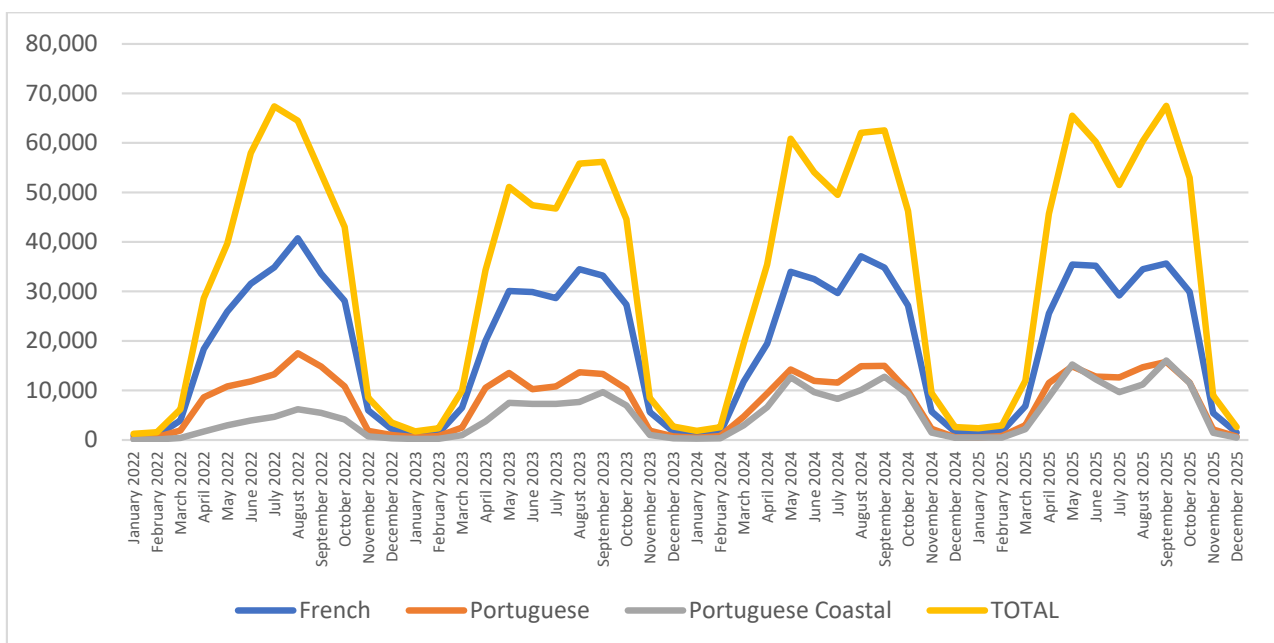


Figure 6. Monthly evolution of the number of pilgrims on the Camino de Santiago on the three most frequented routes of the Camino de Santiago. Period 2022–2025. Unit: number of pilgrims. Source: Own elaboration based on data from the Pilgrim Reception Office.

This reading is complemented by Figure 7, which shows the monthly evolution of the number of nights spent in public hostels in the Xacobeo Network between 2010 and 2025. The high seasonal concentration of overnight stays highlights problems of efficiency in the use of public infrastructure, as well as tensions in the financial sustainability of the accommodation system. This indicator allows for an assessment of the balance between public investment and effective use of resources, providing a solid empirical basis for designing deseasonalisation strategies.

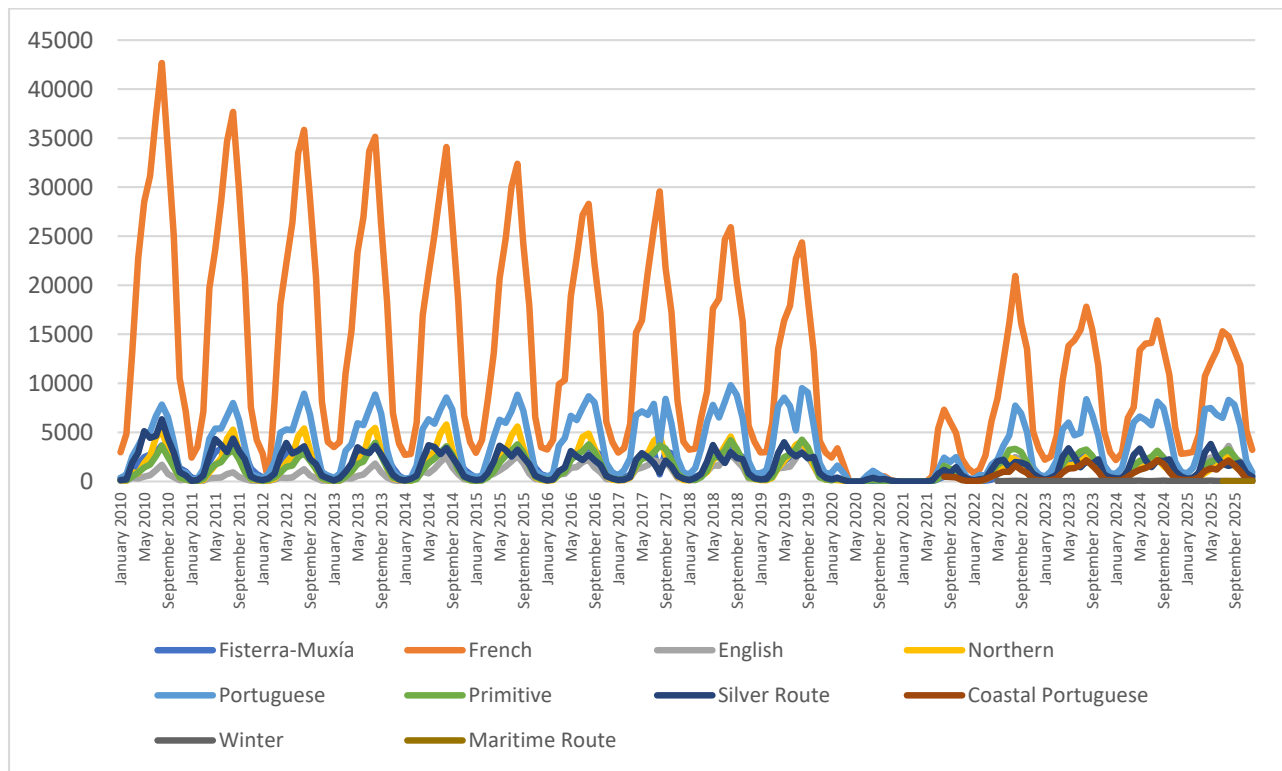


Figure 7. Monthly evolution of the number of nights in public hostels in the “Red Xacobeo” network. Period 2010–2025. Unit: number of nights. Source: Own elaboration based on data from Turismo de Galicia.

The joint analysis of the origin and seasonality of demand is reinforced by Figure 8, which shows the monthly evolution of national and international pilgrims between 2022 and 2025. The figure shows different seasonal patterns, with a greater seasonal concentration of international demand compared to a somewhat more balanced distribution in the domestic market. This result is particularly relevant for the sustainable management of tourist flows, as it allows for the design of selective marketing strategies aimed at reducing peaks in demand and minimising environmental impacts during critical periods.

Finally, Figure 9 shows the monthly evolution of the number of pilgrims from the main international markets between 2022 and 2025. The seasonal synchronisation of different markets in the same months intensifies the risks of congestion and reinforces the need for multilevel governance mechanisms and institutional coordination. This empirical evidence underlines the importance of integrating territorial marketing, planning and sustainability as inseparable components of the management of the Camino de Santiago.

Overall, the results show that demand for the Camino de Santiago cannot be interpreted solely in terms of growth, but rather as a set of key indicators of territorial sustainability. The integration of these indicators into public policies and tourism marketing strategies is essential to ensure the long-term viability of the Camino as a sustainable cultural itinerary, fully aligned with the Sustainable Development Goals.

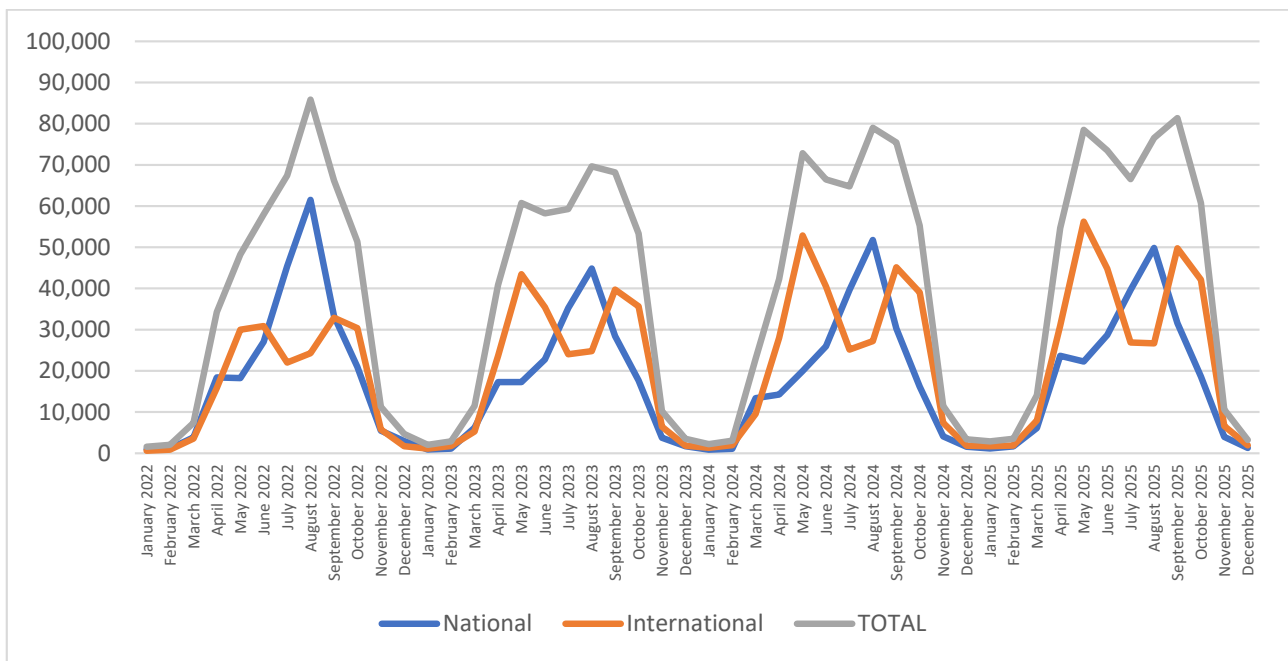


Figure 8. Monthly evolution of the number of pilgrims by origin: national and international. Period 2022–2025. Unit: number of pilgrims. Source: Own elaboration based on data from the Pilgrim Reception Office.

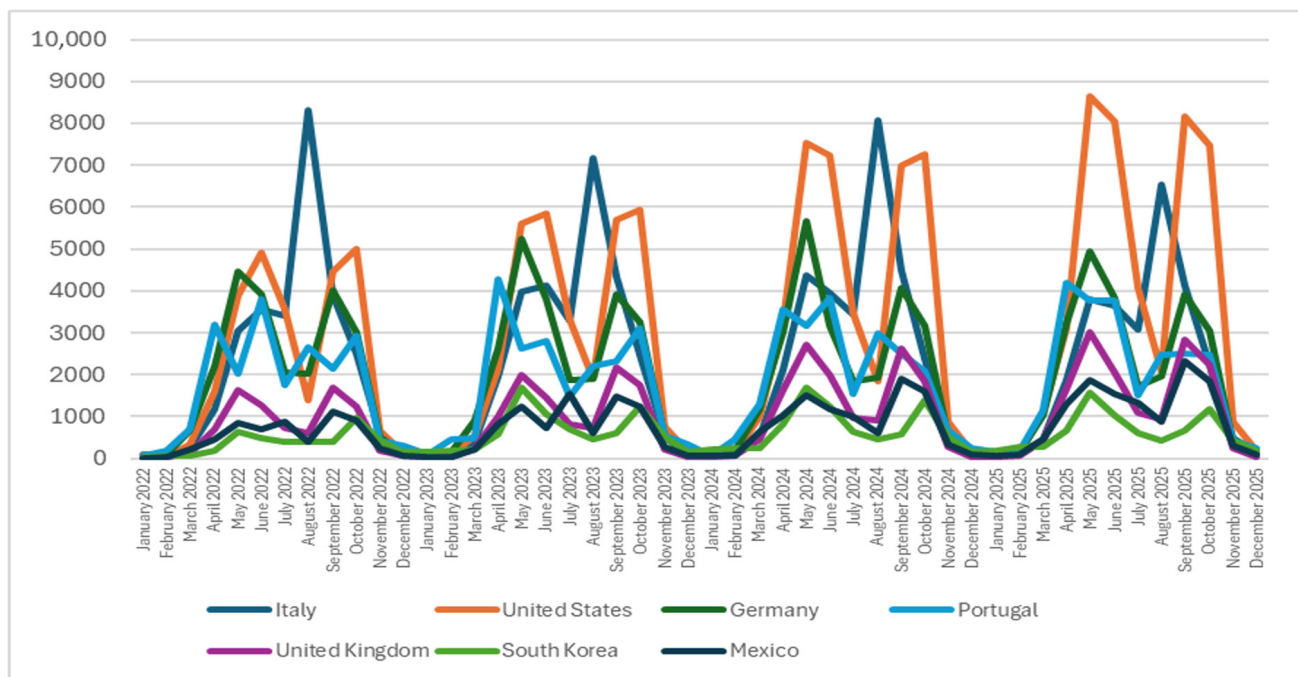


Figure 9. Monthly evolution of the number of pilgrims from the eight main markets of origin in 2025 and South Korea. Period 2022–2025. Unit: number of pilgrims. Source: Own elaboration based on data from the Pilgrim Reception Office.

Finally, the Pilgrim Reception Office in Santiago de Compostela collects annual statistics that allow us to characterise the demand of those who complete the route and request the Compostela (certificate of pilgrimage) at the end of their journey. This statistical corpus, complemented by recent scientific studies on the motivations and behaviour of walkers [12–15], forms the basis on which we have drawn up Table 1 on the profile of pilgrims on the main routes of the Camino de Santiago. The profile synthesis in Table 1 is

derived from a combination of annual statistical reports from the Pilgrim Reception Office (e.g., country of origin, age, mode of transport) and qualitative insights from the cited academic literature (e.g., motivations).

Table 1. Comparative analysis of the profile of pilgrim demand by route on the Camino de Santiago. Source: Prepared internally based on information from the Pilgrim Welcome Office (Santiago de Compostela), the Regional Government of Galicia and reviewed academic literature (2020–2025).

Analytical Variable	French Way	Portuguese Way	Portuguese Coastal Way	English Way	Other Itineraries
Relative weight (%)	50–55	18–20	6–8	4–6	12–15
Recent growth (trend)	Moderate/stable	High	Very high	High	Moderate
Estimated average age	45–50	40–45	42–47	45–55	48–55
Dominant age group	30–60	25–55	30–55	25–64	35–65
Gender (%)	Women 52%/ Men 48%	Women 55%/ Men 45%	Women 58%/ Men 42%	Women 60%/ Men 40%	Men 52%/ Women 48%
National origin (%)	35–40	45–50	30–35	65–70	40–45
International origin (%)	60–65	50–55	65–70	30–35	55–60
Main countries of origin	United States, Italy, Germany	Portugal, Brazil, Italy	Germany, France, Italy	Spain	Spain, France
Religious motivation (%)	35–40	30–35	20–25	30–35	40–45
Spiritual/secular motivation (%)	40–45	45–50	50–55	40–45	35–40
Cultural/tourist motivation (%)	15–20	15–20	20–25	20–25	15–20
Main mode of transport (%)	On foot (>90)	On foot (85–90)	On foot (>90)	On foot (>95)	On foot (80–85)
Bicycle (%)	8–10	10–12	6–8	3–5	12–15
Dominant seasonality	Spring–summer	Summer	Summer	Spring–summer	Summer
Level of previous experience	Medium	Low–medium	Low	Low	High
Predominant type of pilgrim	Traditional–global	Emerging international	Experiential–tourist	National cultural	Expert pilgrim

5. Analysis of Relative Interest in Search Engines for the Camino de Santiago by Language and Country

In this phase of the research, an analysis of interest in the Camino de Santiago by language is carried out. This provides an approximation of the relative interest in the Camino on search engines such as Google. Both current interest and its evolution since we have data (2004) are analysed. This type of analysis is a highly relevant counterpoint to statistical data on tourist numbers. It shows data that can be compared with official statistics and evaluates billions of searches on search engines over the years. The advantage is that it is completely objective and not subject to any kind of methodological error or administrative interest. Similarly, comparison with other official visitor data can corroborate and support official statistics, reveal methodological errors or opportunities for improvement, or even highlight problems in converting digital interest into direct visitor numbers at the destination.

Thus, the initial analysis of the historical relative interest in the five languages logically shows that Spanish is the language with the most searches, with a clear disproportion.

As can be seen in Table 2, the relative interest percentage for the term in Spanish is 28.20, which is 14.5 times higher than in English (second in relative interest).

Table 2. Average Interest by Term (0–100) Source: Prepared internally based on data from Google Trends.

Term/Language	Average Interest
Camino de Santiago (Spanish)	28.20
Way of James (English)	1.94
Caminho de Santiago (Portuguese)	1.80
Chemin de Jacques (French)	1.30
Camino de Santiago (Galician)	0.23

5.1. Analysis in Spanish

The significant disparity in relative interest between languages prevents a joint graphical analysis of all languages. Therefore, we have chosen to analyse the term in Spanish and then make a comparative evolution of the terms in the other four languages. In Spanish searches for the term “Camino de Santiago”, a clear seasonality of searches can be observed (Figure 10), with July and August as recurring peaks of maximum searches. In any case, there is a downward trend in relative interest over time. To verify this, a Theil–Sen slope analysis was performed together with the Mann–Kendall test on the data series in Figure 10. The data show a decreasing slope (Theil–Sen slope: -0.52 points of interest/year) with an intersection (median) of 48.96 points. If we analyse only the last five years, as can be seen in the graph, searches remain at similar minimum and maximum peaks. After performing the same Theil–Sen slope analysis together with the Mann–Kendall test from 2021 onwards, the results show some growth, which, however, does not allow us to reach the data prior to 2013. The Mann–Kendall test gives a $Z = 2.44$ ($p < 0.05$), confirming a slight increase, but at historic lows. In conclusion, it seems clear that there is a decline in general interest, as demonstrated by the Theil–Sen slope.

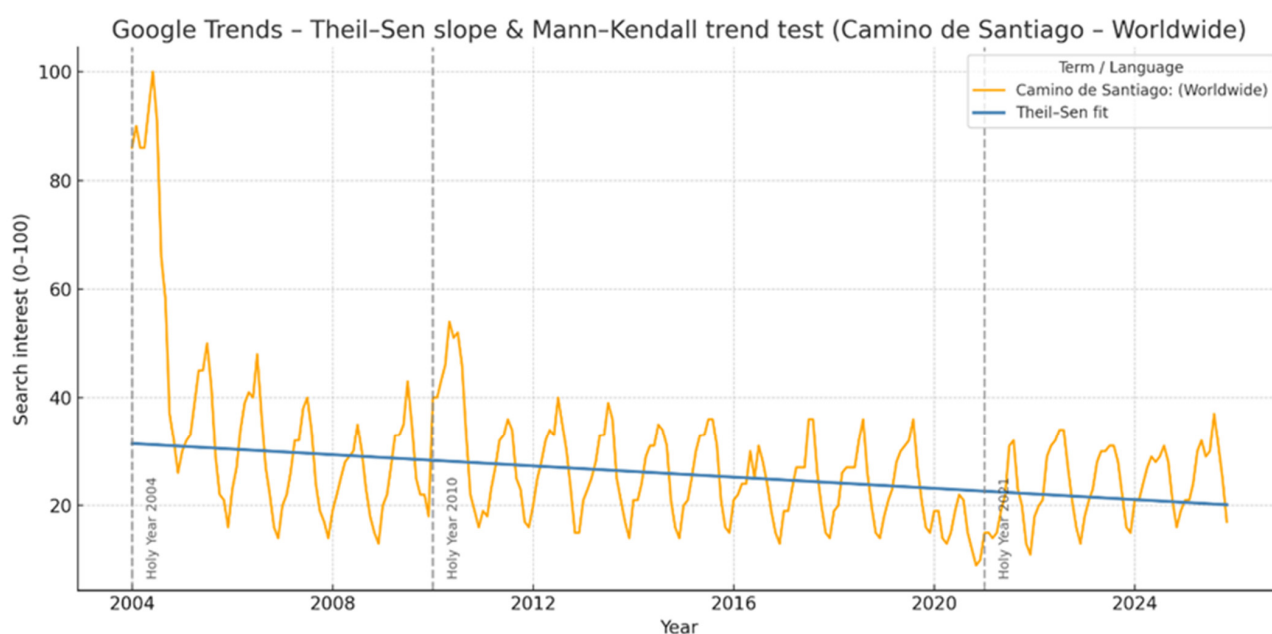


Figure 10. Analysis of the evolution of relative interest in the term in Spanish with the Theil–Sen slope Source: Own elaboration based on data from Google Trends.

5.2. Analysis in Galician, English, Portuguese and French

With regard to data on interest in the Camino in Galician, English, Portuguese and French, we can see that relative interest is higher in English, closely followed by Portuguese

and, to a lesser extent, French. In the case of Galician, despite an increase in interest from 2007 to 2010, searches subsequently stagnated and, in no case, reached the level of the other languages, remaining at an interest level of 3.3 (which is also logical given the volume of speakers and perhaps due to the change in the regional government's language policy) (Table 3). Despite the similarity between the first three languages, it is worth noting that the superiority of English in terms of relative interest is only due to a considerable explosion since 2020/2021, which has increased its overall relative value.

Table 3. Average Interest by Term (0–100). Source: Prepared internally based on data from Google Trends.

Name in Different Languages	Average Interest (0–100)
Way of James (English)	33.75
Caminho de Santiago (Portuguese)	31.91
Chemin de Jacques (French)	23.08
Camiño de Santiago (Galician)	3.3

With regard to trends in English, French and Portuguese, searches were relatively similar from 2004 to 2011, but since then we have observed a gradual decline in searches in French and Portuguese, while English searches have remained steady until 2020 (Figure 11). If we analyse the data relating to the Theil–Sen slope analysis together with the Mann–Kendall test, the data show that interest in the route is declining in most cases. Firstly, searches in French are declining by $-0.56/\text{year}$, followed by Portuguese with $-0.44/\text{year}$. In the case of Galician, the data is relatively minor compared to the other languages, making the results difficult to interpret, but they show a relatively linear evolution close to 0 (Table 4). The great distortion of languages occurs in searches for the Camino in English, which, after August 2021, skyrocketed in interest compared to the other languages. In fact, since that month, English has been well above the rest, reaching the peak interest of all languages since we have data in December 2022 and almost repeating it (with an interest index of 98 in September 2025 (Figure 11). As for the Theil–Sen slope for English ($+0.59/\text{year}$), this would increase much more if it were done in recent years.

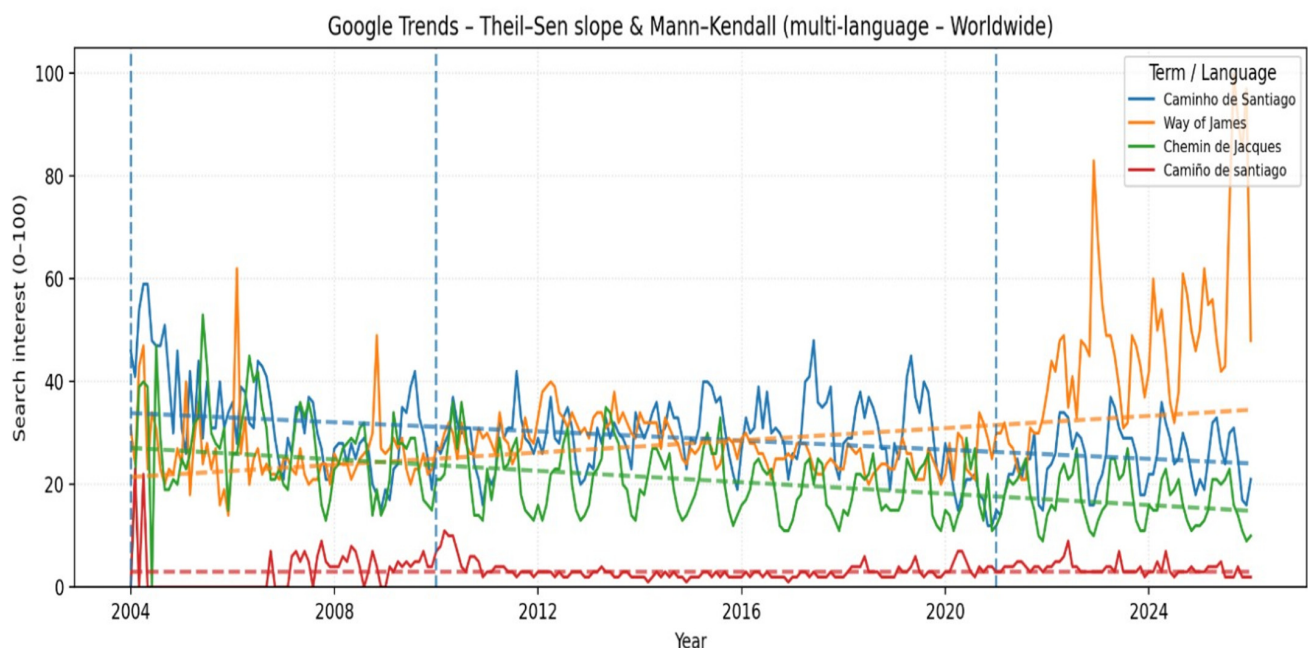


Figure 11. Analysis of the evolution of relative interest in the term in English, Portuguese, French and Galician with Theil–Sen slope. Source: Own elaboration based on data from Google Trends.

Table 4. Results (Theil–Sen in points of interest/year + Mann–Kendall). Source: Own elaboration based on data from Google Trends.

Language of the Term	Slope	MK	Trend
Portuguese	$\approx -0.44/\text{year}$	$p = 5.37 \times 10^{-9}$	Decreasing
English	$\approx +0.59/\text{year}$	$p = 1.98 \times 10^{-13}$	Increasing
French	$\approx -0.56/\text{year}$	$p = 1.33 \times 10^{-15}$	Decreasing
Galician	$\approx 0.00/\text{year}$	$p = 1.54 \times 10^{-4}$	Slight growth, but insufficient data

Finally, if we analyse the impact of Holy Years or Jacobean Years on relative interest in the Camino in different languages, we see that the impact is almost nil. The only relative exception is in Galician, with a considerable impact in 2004, a lesser impact in 2010 and, as in the case of Spanish, no impact in the last Holy Year of 2021. As for the impact in Portuguese, French or English, the graph does not show any particular repercussion from these holy years.

5.3. Analysis by Country

Finally, an analysis of relative interest by term and by country was carried out, showing the rankings of all countries with their respective interest index, provided that they gave positive data based on Google Trends criteria (Table 5). In terms of the number of searches, the main language in absolute terms is Spanish. However, the second country in searches for the term in Spanish is not a Spanish-speaking country but Ireland. Spanish-speaking countries are found in the following positions, except for two other English-speaking countries, Australia and New Zealand. In any case, out of a total of 100 search interest points for Spain, only Ireland, Uruguay and Puerto Rico exceed 10 points of interest.

Table 5. Ranking of relative interest in the Camino de Santiago by country and language. Source: Own elaboration based on data from Google Trends.

Spanish		
Ranking	Country	Relative interest
1	Spain	100
2	Ireland	15
3	Puerto Rico	13
4	Uruguay	12
5	Chile	7
6	Argentina	6
7	Slovenia	5
8	Portugal	5
9	Costa Rica	5
10	New Zealand	4
Galician		
Ranking	Country	Relative interest
1	Spain	100
2	Portugal	6

Table 5. Cont.

French		
Ranking	Country	Relative interest
1	France	100
2	Reunion	31
3	Switzerland	25
4	Luxembourg	25
5	Belgium	20
6	Canada	6
7	Spain	2
8	Portugal	2
9	Morocco	2
Portuguese		
Ranking	Country	Relative interest
1	Portugal	100
2	Brazil	18
English		
Ranking	Country	Relative interest
1	United States	100
2	Philippines	75
3	New Zealand	58
4	Australia	58
5	Ireland	58
6	United Kingdom	50
7	Canada	41
8	Nigeria	41
9	Kenya	33
10	South Africa	33
11	Singapore	25
12	United Arab Emirates	16
13	Portugal	16
14	Spain	16
15	Hong Kong	8
16	Pakistan	8
17	Norway	8
18	India	8
19	Denmark	8
20	Bangladesh	8
21	Malaysia	8
22	Sweden	8
23	Netherlands	8
24	Switzerland	8

Table 5. *Cont.*

25	Romania	8
26	Belgium	8
27	Greece	8
28	Czech Republic	8
29	Hungary	8
30	Vietnam	8
31	Austria	8
32	Finland	8
33	Indonesia	8
34	Germany	8

On the other hand, as is evident, the largest number of countries corresponds to English due to the global spread of the language. This is followed by Spanish and French. To a lesser extent, Portuguese appears with only relative importance in Portugal and Brazil. In this sense, a geographical analysis of relative interest by country shows a clear centrality of Western Europe, with Spain as the undisputed core in all the terms analysed, which is logical as the final destination of the product. Alongside Spain, countries with strong historical, cultural or migratory links with Europe, such as Ireland and Portugal, as well as some Latin American countries (Puerto Rico, Uruguay, Chile, Argentina), appear repeatedly, where interest seems to be articulated both by shared cultural heritage and by dynamics of mobility, religious tourism and the circulation of identity narratives. The presence of small countries or those not directly linked to the traditional Jacobean space (such as Slovenia or Costa Rica) also suggests the existence of specific niches of interest, probably associated with active pilgrim communities or specialised digital networks. From a broader perspective, the spatial pattern reveals a concentrated but globally distributed interest, with Europe and America acting as the main poles, while Africa and much of Asia are virtually absent once marginal values (<1) are eliminated. This result reinforces the idea that the Jacobean phenomenon, in terms of digital searches, functions as a transnational but not truly global cultural system, articulated around areas with greater Western Christian symbolic capital and greater integration into international tourist circuits.

6. Discussion

The results obtained confirm that the Camino de Santiago can be interpreted as a mature territorial tourism system, characterised by sustained growth in demand, high resilience to external disturbances and increasing complexity in its territorial impacts. These findings align with the characteristics of the consolidation stage in [16] TALC model. However, this growth should be analysed not only in terms of tourism success, but also as a process that generates cumulative externalities on environmental, social and governance systems, consistent with contemporary debates on strong sustainability and limits to tourism growth.

In quantitative terms, the evolution of the number of pilgrims between 2004 and 2025 shows a structural growth trend, interrupted only by the disruptive global health crisis of COVID-19 and followed by a rapid and robust recovery. This pattern confirms the resilience of the tourism product, understood as the capacity of the tourism system to absorb external impacts and reorganise itself without losing its essential functions. This behaviour coincides with what has been noted in the literature on established cultural destinations, which tend to show a high capacity to adapt to external crises due to their market diversification, the

symbolic strength of their brand and institutional stability [16,17,22]. The pandemic may have paradoxically reinforced the Camino's appeal as an open-air, low-density experience, a hypothesis that warrants further qualitative research. However, from a critical perspective, this resilience should not automatically be interpreted as sustainability, as it can coexist with processes of territorial overexploitation and progressive environmental degradation, especially in highly sensitive heritage destinations. However, in the case of the Camino de Santiago, the resilience is reinforced by its itinerant and experiential nature, which allows for flexible adaptation of demand and partial redistribution of flows throughout the territory.

One of the most relevant results is the spatial concentration of demand, evidenced by the predominance of the French Way among all the itineraries. This pattern coincides with the findings of [2], who already pointed out the role of the French Way as the dominant axis of the Jacobean system. From a quantitative perspective, this concentration implies a highly uneven distribution of tourist flows, which increases pressure on certain sections and urban centres, while others remain underused. This reality limits the capacity of the Camino de Santiago as a tool for balanced territorial development. Therefore, the territorial tourism system of the Camino de Santiago reproduces classic patterns of tourist polarisation and contradicts the objectives of territorial balance and rural cohesion promoted by the 2030 Agenda, particularly SDG 10 (reducing inequalities) and SDG 11 (sustainable cities and communities). This spatial imbalance calls for targeted demarketing strategies [18] for the French Way, coupled with positive reinforcement and infrastructure investment in less-travelled routes to redistribute flows more equitably.

Seasonality emerges as another critical indicator of structural unsustainability. Monthly series of pilgrims and overnight stays show recurring peaks in the summer months, with occupancy rates well above the annual average. From a quantitative point of view, this seasonal concentration implies a systemic inefficiency in the use of public infrastructure, which is oversized for short periods and underutilised for the rest of the year. This seasonal pattern of demand increases the ecological footprint of tourism and reduces the economic efficiency of the host system [10,17]. Seasonality intensifies environmental and social impacts by concentrating waste, water and energy consumption, and conflicts over space use in limited periods, reinforcing the relevance of concepts such as dynamic carrying capacity and overtourism.

Analysis by origin of demand confirms an advanced process of internationalisation, with more than 50% of pilgrims coming from abroad. These data are consistent with the growing global visibility of the Camino as a tourist brand [23,24]. This result can be interpreted in two ways. On the one hand, market diversification reduces the economic vulnerability of the destination to regional crises, which is in line with SDG 8 (decent work and economic growth). On the other hand, the increase in international flows implies a potential increase in the carbon footprint associated with long-distance mobility, which introduces a direct tension with the climate objectives of SDG 13 (climate action). As noted by [17], this contradiction highlights a central dilemma for sustainable tourism: economic benefits from long-haul markets often come at a significant environmental cost. This underscores the need to incorporate explicit environmental metrics, such as carbon accounting, into the analysis of the Camino's sustainability and to promote lower-carbon travel options to and within the destination.

In this context, Google Trends data provide methodological added value by allowing the evolution of digital interest to be evaluated as an indirect indicator of positioning and potential demand. The graphs again show a clear seasonality of the Camino de Santiago with strong peaks in summer and relatively little interest in winter. In the holy years analysed, there has been no reduction in seasonality, but rather a greater disproportion

and, therefore, an increase in pressure and carrying capacity on the destination. On the other hand, the data show that the impact of holy years in Spanish and Galician has been declining over the last 20 years. As for the other languages analysed, the impact has been virtually nil. This is a key finding: the declining relevance of Holy Years is particularly evident in the digital search interest of international markets (English, French, Portuguese). This suggests that the motivational shift away from the strictly religious Jacobean cycle is most pronounced in the international sphere. Therefore, the data show that, at least at the international level, large public investments in Holy Years are not justified. The political strategy should analyse investment in the deseasonalisation of the tourism product to the extent that it has greater capacities than other products, especially if we take into account the potential of the Galician region's tourism image associated with rain, which has been shown to be a clear factor of attraction in non-summer periods. Thus, from an economic, territorial and social point of view, it seems clear that centralising efforts on holy years does not contribute to the sustainability of the destination and that these efforts would be better directed towards the deseasonalisation of the destination.

With regard to the analysis by country, the results are highly relevant to tourism sustainability insofar as they allow us to identify, on an empirical and comparable basis, where potential demand (digital interest) is concentrated and, therefore, where it makes most sense to target preventive management measures before pressure on the territory materialises. Knowing which markets show the greatest interest helps to design strategies for deseasonalisation and deconcentration. It is therefore necessary to promote alternative itineraries, less crowded stages or off-peak visits for those geographical areas or areas of cultural and linguistic influence where the increase is considerable. This would be the case for English and the US. The methodology developed allows for the adjustment of infrastructure capacity (accommodation, transport, waste, water) and the planning of responsible communication campaigns (e.g., promoting low-carbon mobility, environmental behaviour and community respect) tailored to specific cultural and linguistic profiles. Future research should analyse the correlation between digital interest and its economic and territorial transformation, aligning destination promotion with regenerative tourism and evidence-based management objectives.

7. Conclusions

This study has analysed the dynamics of tourist demand on the Camino de Santiago from a territorial and sustainability perspective, integrating traditional indicators of tourist mobility with metrics of digital interest. The results allow us to draw several conclusions that are relevant both for academic debate and for the practical management of long-distance cultural itineraries.

Firstly, the Camino de Santiago is confirmed as a mature, resilient and highly internationalised tourist destination, whose recent evolution responds to structural rather than circumstantial factors. The sustained growth in demand, even in non-Jacobean years, shows that the appeal of the Camino is increasingly based on values associated with slow walking, personal experience and contact with the landscape, and less on the strictly religious dimension. This change reinforces its insertion into contemporary trends in cultural and experiential tourism.

Secondly, the study shows that the growth in demand is an ambivalent factor from a sustainability perspective. While it generates economic opportunities and contributes to the revitalisation of rural areas, it also amplifies environmental, social and territorial risks, especially in contexts of high spatial and seasonal concentration. In this sense, the Camino de Santiago paradigmatically illustrates the tensions between tourism success and sustainability, which are widely debated in the literature on overtourism and carrying capacity.

One of the main contributions of the study lies in the combined use of official statistical data and digital interest indicators. This approach makes it possible to capture both the material dimension of tourist flows and the symbolic dimension of the destination's positioning. The results suggest that the evolution of online interest does not necessarily follow the same trajectory as the number of pilgrims, reinforcing the idea that the Camino has reached a stage of consolidation in which reputation and accumulated experience play a central role.

From a public policy perspective, the study's conclusions highlight the need to reorient the management strategies for the Camino de Santiago. This reorientation implies a shift from event-based management (Holy Years) to structural policies for sustainability. Several key governance implications emerge from our analysis:

1. **Flow Redistribution Strategies:** Implement targeted measures to alleviate pressure on the French Way, such as promoting alternative itineraries (e.g., the Portuguese Coastal Way, the Northern Way) through specific marketing campaigns and improving their infrastructure. This addresses the spatial imbalance identified in the results.
2. **Deseasonalisation Policies:** Actively promote the Camino during off-peak seasons (autumn, winter, early spring). This could involve developing thematic itineraries related to local culture, gastronomy, or the "green" landscape, and working with the tourism industry to offer attractive off-season packages.
3. **Integration of Environmental Metrics:** Move beyond visitor numbers as the sole indicator of success. Incorporate environmental impact assessments, including carbon footprint calculations for long-haul travel and monitoring of resource consumption (water, waste) along the busiest routes. This is crucial for addressing the tension between internationalisation and climate goals.
4. **Differentiated International Market Management:** Use digital interest data, as demonstrated in this study, to anticipate demand from specific countries (e.g., the surge in English-language interest). This allows for proactive communication campaigns that target these markets with messages about responsible travel, low-season options, and lesser-known routes, shaping demand before it translates into pressure.

The concept of eco-pilgrimage, briefly mentioned in the literature, offers a useful framework for integrating these implications. It envisions a pilgrimage model where sustainability is embedded in the journey itself—from low-carbon transport to the destination, to responsible behaviour on the trail, and positive interaction with local communities. While a full development of this concept is beyond the scope of this paper, it represents a crucial area for future research and practical innovation for the Camino's management bodies [25,26].

Likewise, the internationalisation of the Camino poses specific challenges in terms of environmental sustainability, particularly in relation to the carbon footprint of long-distance travel. In this context, the incorporation of sustainability criteria into territorial marketing and the promotion of responsible mobility practices emerge as priority lines of action.

Among the limitations of the study, it is worth noting the use of aggregate data and indirect indicators of interest, which opens the door to future qualitative research that delves deeper into the perceptions of pilgrims, residents and managers. The specific role of the COVID-19 pandemic in reshaping the Camino's image as a safe, open-air space also requires further investigation. It would also be relevant to incorporate direct environmental impact metrics and comparative analyses with other international cultural itineraries to better contextualise the results.

In conclusion, the Camino de Santiago represents a privileged laboratory for analysing the contemporary challenges of sustainable tourism on long-distance cultural routes. Its future management will require a delicate balance between heritage conservation, tourism

competitiveness and environmental responsibility, fully aligned with the Sustainable Development Goals. The ability to strike this balance will determine not only the long-term viability of the Camino, but also its role as an international benchmark for sustainable cultural tourism.

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