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Business Operators' Perception of the Impact of the Portuguese Way of St. James

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Cover Page Footnote

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Business Operators' Perception of the Impact of the Portuguese Way of St. James

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This research aims to analyse business operators' perception of the impact of the Portuguese Way of St. James and to assess the landscape situation along a total section of 115 kilometres. Perceptions were collected in a survey of 112 small operators between 2020 and 2021. The diversity and singular components of the landscape make it a pleasant route to experience, where pilgrims have the possibility to improve wellbeing, and enjoy the landscape. Operators have profited from the significant increase in the number of pilgrims walking along the Way and claim that they aim to continue their operations.

Key Words: tourist, pilgrim, business operators, perception, Portuguese Way of St. James, mixed methods

Introduction

The Way of St. James is the most important Christian pilgrimage involving a set of routes that have existed for over a 1,000 years, with different routes spanning the vast territory of the Iberian Peninsula (Fernández *et al.*, 2021). Traversing the Way is a cultural experience (solitary or a collective one). The main motivations of travellers are related to nature, culture, history and gastronomy (Lois-González & Santos, 2015). Studies that compare tourists and pilgrims are necessary (Collins-Kreiner & Klot,

2000), despite the difficulty in access to religious tourism data (Griffin & Raj, 2017). Notwithstanding, there are a growing number of holy places being visited for purposes other than prayer (Rejman *et al.*, 2016). The authors also recognise that modern pilgrims seek additional incentives to undertake a journey.

Undertaking a pilgrimage such as the Way involves three basic activities: walking (in a few cases, pilgrims choose to travel by bicycle or other transport models), eating and sleeping. For this reason, pilgrims have to deal with

fewer activities and stimuli than those in their complex daily lives. This gives them the opportunity to reflect upon and rethink their lives and priorities. The Way implies physical and mental challenges and the adoption of strategies to deal with adversities. Even though, modern-day pilgrims are quite different from those of previous centuries (Kim *et al.*, 2020; Kurrat, 2019), who were guided by the sun and stars, the constant awareness of personal insecurity and accessibility is still one of the most important factors in the development of a tourist destination (Polat & Arslan, 2019).

Considering these features, the present study deals with two dimensions of the Way. The first is related to the offer of goods and services for pilgrims which are available along the Portuguese Way of St. James, and, on that basis, the perceptions of business operators along the route regarding the economic contribution of the pilgrims for the success of their businesses. 'Religious tourism' can be, indeed, an important source of income for a territory (Graave *et al.*, 2017). In this context, we have focused on several elements, ranging from the kind of product / service which operators provide, to the share of demand from pilgrims as a portion of their total business and the impact that the COVID-19 pandemic had on their business income. As far as we could verify, no similar approach to this research has been performed to date.

Valuable insights may be extracted from these results, in terms of the economic impact of pilgrims on the territories that they cross. Furthermore, we can list a small number of gaps and fragilities which may negatively affect pilgrims' wellbeing and, on this basis, produce recommendations on the design of policies that aim to correct the identified problems.

Based on previous research, a mixed approach was used to collect the dataset used in the analysis. The qualitative data derives from applying a grid of 22 variables. As already mentioned, this fieldwork was complemented by the quantitative analysis of data collected in a survey administered to 112 business operators available along the Way of St. James.

The present paper is structured across four sections. After the Introduction, the first section deals with the literature review on religious tourism and pilgrimage,

and the economic impacts of pilgrims on the territories they cross. The second section refers to the sources of data and analytical methods used. The third section provides the main results and their discussion. Finally, we provide conclusions and recommendations, including identification of several gaps and provision of recommendations to the local and regional authorities.

Literature Review

(pilgrimage, pilgrim motivations and economic impact on the territories located along pilgrimage routes)

The first studies about religion-induced travel emerged in the late 1980s (Kim *et al.*, 2020). Since then, a plurality of disciplinary and interdisciplinary approaches has been adopted. In the specific case of economics, scholars have looked at the various ways in which religion and religion-induced travelling interacts with the economy.

Since the late 1980s, several authors (e.g., Horne, 1984), identify the tourist as a modern pilgrim. In the words of Lopez *et al.* (2018:18), citing Frey (1998) and Ivakhiv (2003), 'Tourism is a modern metamorphosis of travel and pilgrimage'. Authors such as Margry (2008), Sharpley (2009) and Norman (2011) have also highlighted that historical pilgrimages are the basis of what is practiced in contemporary tourism. Related to religious tourist attractions, pilgrimage routes and festivals, a concept that has emerged recently is that of postmodern pilgrimage, viewed as a manifestation of secular pilgrimage (Graave *et al.*, 2017; Kim *et al.*, 2020). In this regard, referring to the Way of St. James, Fernández *et al.* (2021) claim it has become an increasingly highly-rated adventure, cultural and spiritual destination.

Religious tourism is a niche tourism activity that comprises persons who repeatedly engage in visits to religious sites and / or pilgrimage. The distinction between pilgrimage and tourism is not, of course, easy to establish, since a cultural tourist can also be interested in visiting a church or participating in some kind of religious festivities (Lopez *et al.*, 2018).

Even if some religious organisations and pilgrims do not view pilgrimage as a form of tourism, comparable to any other kind of tourism, from the industry's point

of view religious tourism has an impact on the economy of a tourism destination in the form of income, profit and employment (Graave *et al.*, 2017). Additionally, to the activities directly related to tourism (hotels and restaurants, transport, rental services, food and beverages products), financial and business services also benefit from the expenditure of pilgrims (Graave *et al.*, 2017).

In recent decades, pilgrimage routes have increasingly become itineraries involving a clear multiplicity of motivations (Kim *et al.*, 2020) extending beyond the religious and spiritual ones. In fact, the previously-affirmed travel objectives are now frequently combined with cultural, ecological, and even sports motivations (Amaro *et al.*, 2018; Fernández-Poyatos *et al.*, 2011), along with relaxation and socialisation (Kim *et al.*, 2020; Kurrat, 2019). The studies conducted, commonly find that pilgrims' motivations include finding oneself, escaping from everyday life, enjoying calmness and feeling a spiritual atmosphere (Gamper & Reuter, 2012, cited by Kurrat, 2019). Enjoying nature and pleasant landscapes are also identified (Kurrat, 2019).

Interaction with the surrounding landscapes and the psychological environment generated along the Way have the potential to enable pilgrims gain a sense of personal renewal and return to their everyday lives with new experiences and memories (Kurrat, 2019; Scriven, 2014). For this reason, the Way is increasingly viewed as a multifaceted sociocultural spatial practice, that plays a relevant role in the lives of millions of people. Spiritual journeys enable individuals to slow down the daily pace of their lives. These journeys imply a 'juxtaposition' of spiritual and material dimensions (van Laer & Izberk-Bilgin, 2018).

The Way of St. James, specifically, is primarily associated with religious tourism practices, even if, as in other pilgrimage routes, it can also attract many more people than those endowed with strictly religious motivations. Following Durán-Sánchez *et al.* (2018) and Kurrat (2019), using data from the *Oficina de Acogida al Peregrino* (the Pilgrim Reception Office) in Santiago de Compostela, over 300,000 tourists travelled along the *Camino* in 2017. The true number of pilgrims is probably higher since, according to the estimates of Lois-González

and Santos (2015), only around 11.5% of pilgrims record their arrival in the Pilgrim Reception Office in Santiago de Compostela.

In 2003, the number of pilgrims registered was just 74,614 (Fernández *et al.*, 2021). The number was considerably higher in 2019 when the Pilgrim Reception Office registered a total of 347,578 pilgrims. During the COVID-19 pandemic, the number of pilgrims fell: and by 2021 there was a total of 178,912 pilgrims from more than 145 countries around the world.

Pursuing a more in-depth assessment of the impact of pilgrimage to Santiago de Compostela in Galicia (Spain), as a whole, even if referring to an earlier year (2010), Graave *et al.* (2017) found that the expenditure by pilgrims could have generated between €59.750 and €99.575 million in Gross Value Added, creating between 1,362 and 2,162 jobs. Most of the impact was experienced by 'Retail and Travel', 'Industry and Manufacturing', 'Services' and 'Financial and Real Estate Services'. According to the authors of the study, these numbers should be considered to be conservative estimates (Graave *et al.*, 2017).

Based on the aforementioned figures, the Way of St. James has a huge potential impact on the economic and cultural development either of the final destination (Santiago de Compostela) or the territories located along the variety of pilgrimage routes (Kim *et al.*, 2020). Martins & Ribeiro (2021) in research addressing the North of Portugal, found that the circumstance of a municipality belonging to some tourist routes, like the Way of St. James, was a major driver for the attraction of visitors.

Keeping our focus on the Way of St. James, one can add that, reviewing the literature on religious tourism published between 1983 and 2018 by twelve tourism journals listed in the Social Sciences Citation index, Kim *et al.* (2020) found a total of 84 papers. Of those, the Way of St. James was the focus on only six occasions and none of the papers addressed the economic impact of the Way on small shops and businesses located along the routes and their dependence on pilgrims' demand for products and services.

The only publication we found which maintains some kind of relationship with the first issue we will address in our research is Fernández *et al.* (2021), which explores residents' perception of the impacts of the (French) Way of St. James in two rural Galician municipalities. As expected, following the results achieved, the residents who derived some of their income from the tourism industry-related services or had a closer contact with pilgrims were the ones who had a more favourable perception of those impacts.

Ribeiro & Remoaldo (2020) identified the socioeconomic impacts of the Way of St. James in Barcelos (a municipality crossed by the Central Route of the Portuguese Way of St. James), highlighting that: i) due to the continuous enhancement of demand from pilgrims, 3 public hostels have been made available in the decade between 2010-2019 for pilgrim accommodation; ii) in 2017, pilgrims were responsible for more than 30,000 overnight stays in the accommodation units (pilgrims hostels and other accommodation units) of the municipality; iii) the Way has led to an increase in the supply of accommodation not only in the city of Barcelos but along the route; and iv) the business sector looked to the pilgrims as a potential source of income and employment, which had been translating into the offer of a pilgrims' menu by restaurants and cafés, and as an valuable way of promoting the image of the municipality of Barcelos. The researchers expected that some of the pilgrims who passed through the city would subsequently return with their families and this would lead to the attraction of more visitors.

In relation to the environmental dimension of the *Camino*, included in the aforementioned research (Fernández *et al.*, 2021), we believe that it is interesting to underline the perception harboured by the local residents, in both villages, that its impacts are largely positive. This relates to their view that the Way of St. James contributes to preservation of the landscape and helps to raise the concern of local residents on the need to preserve it. This last perception is in line with the affirmation made by Lopez *et al.* (2018) that pilgrims have more respect and care for nature than ordinary tourists.

Methodology

Sources used

This study used a mixed research approach using both primary and secondary sources. The main objective was to understand business operators' perceptions of economic development and the impacts of the Way of St. James. To complement the main objective, we also defined the type of activities and services available, and determined the type of consumption of pilgrims along the Way. The quantitative research provides an understanding of the perceptions of operators located along the Way, primarily Restaurants, Bars, Bakeries, Accommodation, Pharmacies, Souvenir shops, and Hairdressers.

The survey of businesses consisted of 29 questions, both multiple choice and open answer. It was divided into three sections: i) 18 questions about economic impacts; ii) 7 questions about the Way of St. James; iii) 4 questions to understand the respondent's sociodemographic profile. The research instrument was initially piloted on a small group of 8 business operators on 5 July 2020, which resulted in no changes to the original survey.

A total of 112 self-administered questionnaires was collected from voluntary participants between 5 August 2020 and 25 August 2021. All answers were coded, inputted and evaluated using SPSS (Statistical Package for the Social Sciences) and ArcGIS 10.8 cartographical tools. Several statistical techniques were tested to analyse the quantitative data collected.

The reliability of the questionnaire was confirmed by calculating Cronbach's alpha for the study. The alpha coefficients for the 'economic' and 'tourism' impacts constructs were 0.73. The asymmetry and kurtosis values of the items did not identify any serious breach of normality. All coefficients were below ± 2 .

The overall techniques used in this research were descriptive statistics (frequency, proportion, mean), an ANOVA test to determine the differences between impacts and the geographical location of business operators and the type of economic activities. All analyses are in accordance with the 95% confidence threshold ($p < 0,05$). In addition, a geographic location was associated with each response and the profile of each operator.

Concerning the sociodemographic characteristics of the operators surveyed (Table 1) a well distributed gender profile was observed. In terms of age, more than one third of respondents were 34 years old or younger. Most of the respondents were owners of establishments (67.6%). 65% had completed secondary school or higher education.

This survey was complemented by a grid that was built to understand the location of establishments and the surroundings. The main objective was to understand whether the Way between Maia (Sá Carneiro Airport) and Valença (the border with Galicia, Spain), along a 115 km segment of the route, has diverse and supportive elements for pilgrims. We used as reference, a grid with 11 variables in Microsoft Office Excel and selected the following variables for the present paper:

Location - Georeferencing (latitude and longitude), street and parishes;

Characterisation - Typology of establishments (restaurant, café, supermarket, hostel, pharmacy); Portuguese Classification of Economic Activities; accessibility; capacity; availability of pilgrim menu in restaurants and cafés;

Surroundings - buildings and environment, landscape; General observations.

The fieldwork was carried out by a male and a female researcher, between November 2020 and August 2022.

As a secondary source for Pilgrim data, we also used data from the *Oficina de Acogida al Peregrino* for 2021 which is the main source of statistical data on the Way of St. James.

Some Characteristics of the Portuguese Way of St. James

On an international level, the Portuguese Way of St. James has two official itineraries: the Central Way and the Coastal Way. The main route is the Portuguese Central Way from Lisbon to Valença, which comprises 519 km. Around 173,000 pilgrims traversed the Way in the Iberian Peninsula in 2021 (Oficina de Acogida al Peregrino). More than half of these (59%) began their journey in five cities: Sarria (32%) Tui (9%) and Ferrol (6%) in Spain, Porto (7%) in Portugal and Saint-Jean-Pied-de-Port (5%)

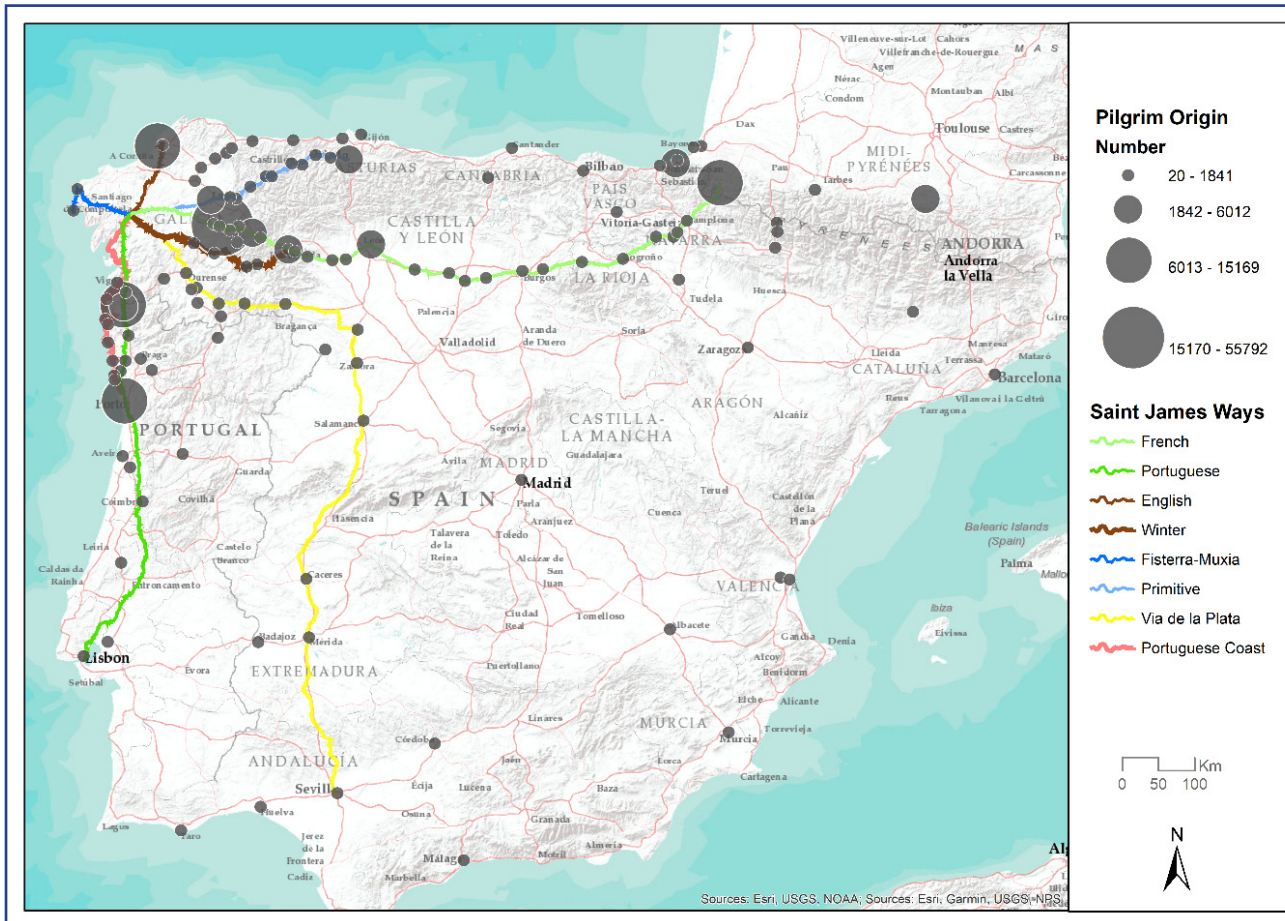
Table 1: Main Sociodemographic Characteristics of Business Operators		
Sociodemographic characteristics	N (112)	%
Gender		
Male	50	45
Female	62	55
Age		
Up to 22	31	28
23-34	44	39
35-49	27	24
Over 49	10	9
Education		
Up to four years	4	4
Up to nine years	34	31
Secondary	36	33
University	29	26
Postgraduate diploma, Master's or PhD degree	7	6
Source: Authors' own elaboration based on sample of 112 responses collected in 2020 and 2021		

in France, in the Pyrenees (Figure 1). Sarria is perhaps the most attractive option, since pilgrims can walk the last 100 kilometres along the Camino de Santiago which is the minimum walking distance which must be completed to receive a Compostela (the official certificate given by the Church after completing the Way).

The Portuguese Way is the second most popular route of the Way of St. James (Oficina de Acogida al Peregrino). In Portugal, the most popular version of the route begins in Porto (Rojo, 2007 – Figure 1). The Portuguese Way has a length of 620 kilometres from the Capital, Lisbon, to the tomb of the apostle in Santiago de Compostela, Galicia (Spain). The predominant landscapes are green, forestry and agricultural land which places pilgrims in contact with nature. The topographic profile of the Way is relatively flat - ranging between 37 metres above sea level in the municipality of Maia to almost 400 metres above sea level in the Alto da Labruja in the municipality of Ponte de Lima. The average slope is 3.7% and the maximum slope is 16%, making it very suitable for elderly or less-able people.

This study focuses on the Portuguese Way, between Francisco Sá Carneiro airport in the municipality of

Figure 1: Origin of Pilgrims in the Iberian Peninsula in 2021



Source: authors' own elaboration, based on Oficina de Acogida al Peregrino, 2021

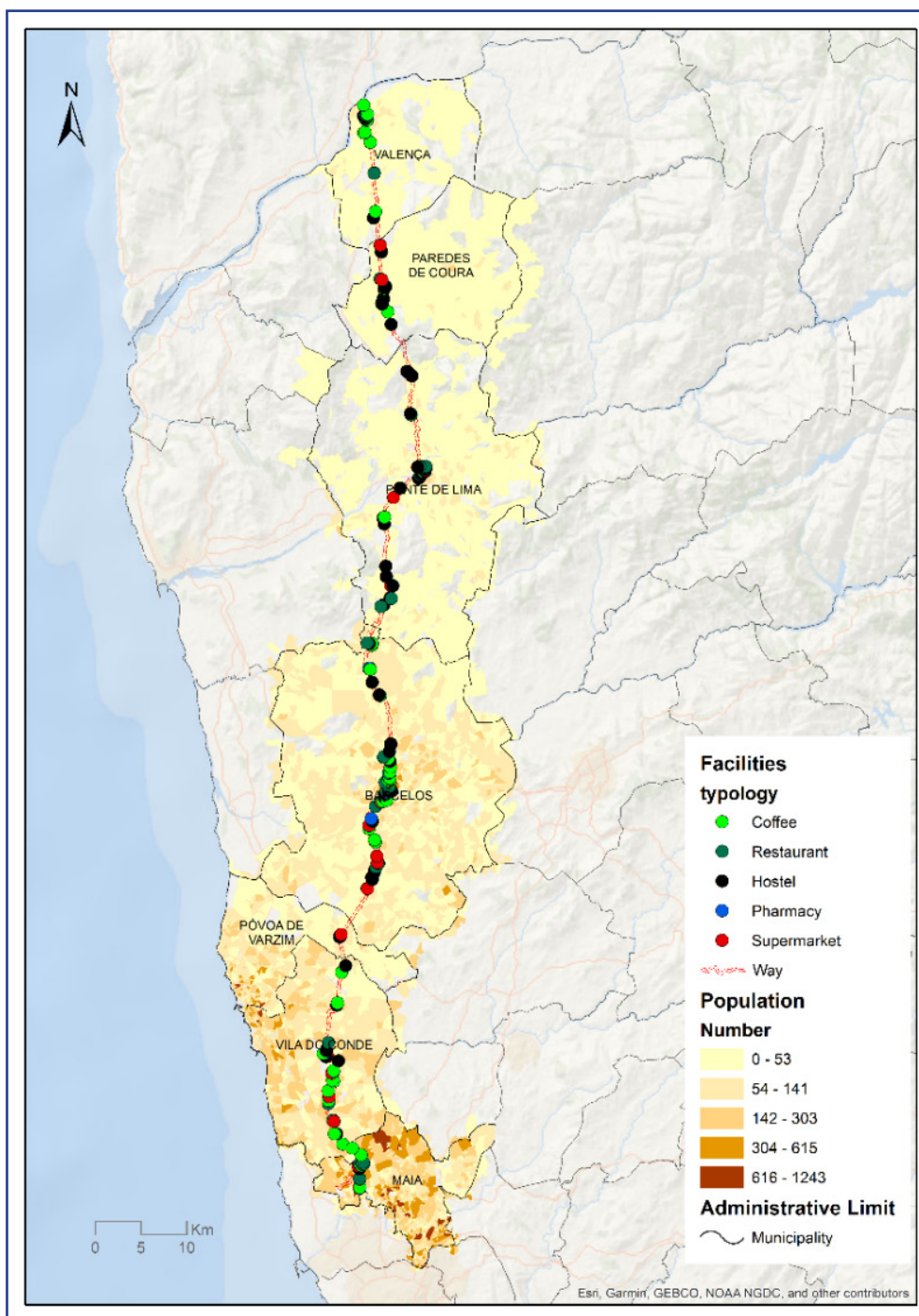
Maia and ending in Valença (on the Portuguese-Spanish border) along a route of 115 kilometres. This section of the Way crosses seven municipalities which had 462,897 inhabitants in 2021 (INE, 2021). It crosses the cities of Maia, Vila do Conde, Póvoa de Varzim and Barcelos which jointly comprise 86% of the total population in the seven municipalities. The final section crosses Ponte de Lima, Paredes de Coura and Valença, which are municipalities with more rural characteristics and have around 66,000 people (Figure 2).

Most of this route is located in the Minho region, which has very specific characteristics. A few studies on the Minho (e.g. Ribeiro & Vareiro, 2012), highlight that the region has an important tourism potential due to the variety and singularity of its resources. The identity and the richness of its traditions was also emphasised by Matoso *et al.* (2010).

The establishments analysed alongside the Way were Restaurants, Cafés, Pharmacies, Accommodation and Supermarkets (Table 2). A total of 242 establishments were found. Valença, near the border with Spain, is the municipality that has the largest offer of establishments, in particular Cafés, Restaurants and Hostels. In average there are 2.2 establishments per kilometre. Maia has the best score, with an average of 3.4 establishments per kilometre, followed by Barcelos with 3.9. Since these establishments respond to pilgrim's primary needs, some important upgrades must be achieved to improve the quality of the Way, in particular in Póvoa de Varzim, Paredes de Coura and Vila do Conde.

The establishments that were most difficult to find were pharmacies and supermarkets, while Hostels were the more representative facility (Figure 3). The longest section of the Way is in Barcelos, which has the best offer of pharmacies (Table 2) and also a good score in all other

Figure 2: Distribution of Main Establishments Along the Portuguese Way between Maia and Valença



Source: Authors' own elaboration, based on data from census 2021 (INE, 2021) and administrative limits from CAOP (DGT, 2021)

services. On the contrary, Paredes de Coura has the worst levels of services, due to its rural characteristics. Also, along the route, discrepancies were found in the food offer, since only two municipalities have supermarkets located along the Way (Table 2 and Figure 3).

Business Operators' Perception of the Impact of the Portuguese Way of St. James

Opening of Business and Relation to Way of St. James

The survey was administered to business operators, and it is interesting to note the intersection between the question 'Did you open the establishment because

Table 2: Length of Route and Main Establishments by Municipality on Portuguese Way Maia-Valença

Parameters	Municipalities						
	Barcelos	Ponte de Lima	Vila do Conde	Valença	Paredes de Coura	Maia	Póvoa de Varzim
Length (km)	31	28,7	19,4	12	10	4,4	3,5
Establishments (N)	91	56	30	27	17	15	6
Facility per km (average)	2.9	2.0	1.5	2.3	1.7	3.4	1.7
Café (N)	27	3	13	13	2	4	1
Hostel (N)	18	25	7	6	11	1	3
Pharmacy (N)	9	2	1	2	1	0	0
Restaurant (N)	30	22	5	6	1	8	1
Supermarket (N)	7	4	4	0	2	2	1

Source: author's own elaboration, based on fieldwork conducted between 2020 and 2022

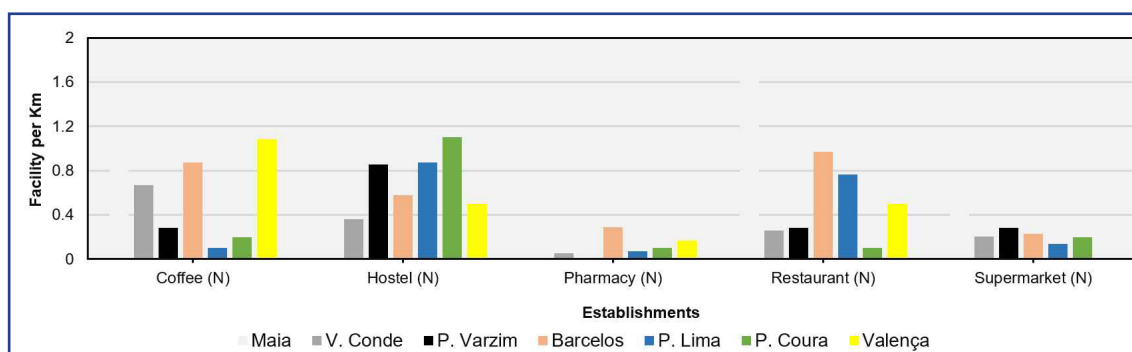
of the Way of St. James?' and the 'Type of activity developed' the results highlight that most operators did not open their business due to the Way. Only 8.3% of respondents revealed that they opened their business due to pilgrims. This was particularly marked in catering and accommodation services.

The majority of respondents who provide accommodation services stated that the Way of St. James was the reason for opening their establishment. These values may be explained by the fact that this type of activity is the only one where the majority of revenue does not derive from local residents. The high percentage can also be explained by the fact that many of the establishments covered in the survey are pilgrim hostels whose principal service is provided to pilgrims. Amongst all respondents, none of the retail shops, vehicle repair services, kiosks and health establishments stated that they decided to open their business because of the flow of pilgrims.

Correlating the type of activity and the year of opening (Figure 4), it is possible to observe the dominance of establishments that opened in the last decade, especially since 2012 (Figure 4). The oldest establishments managed by the survey's respondents were opened more than 100 years ago.

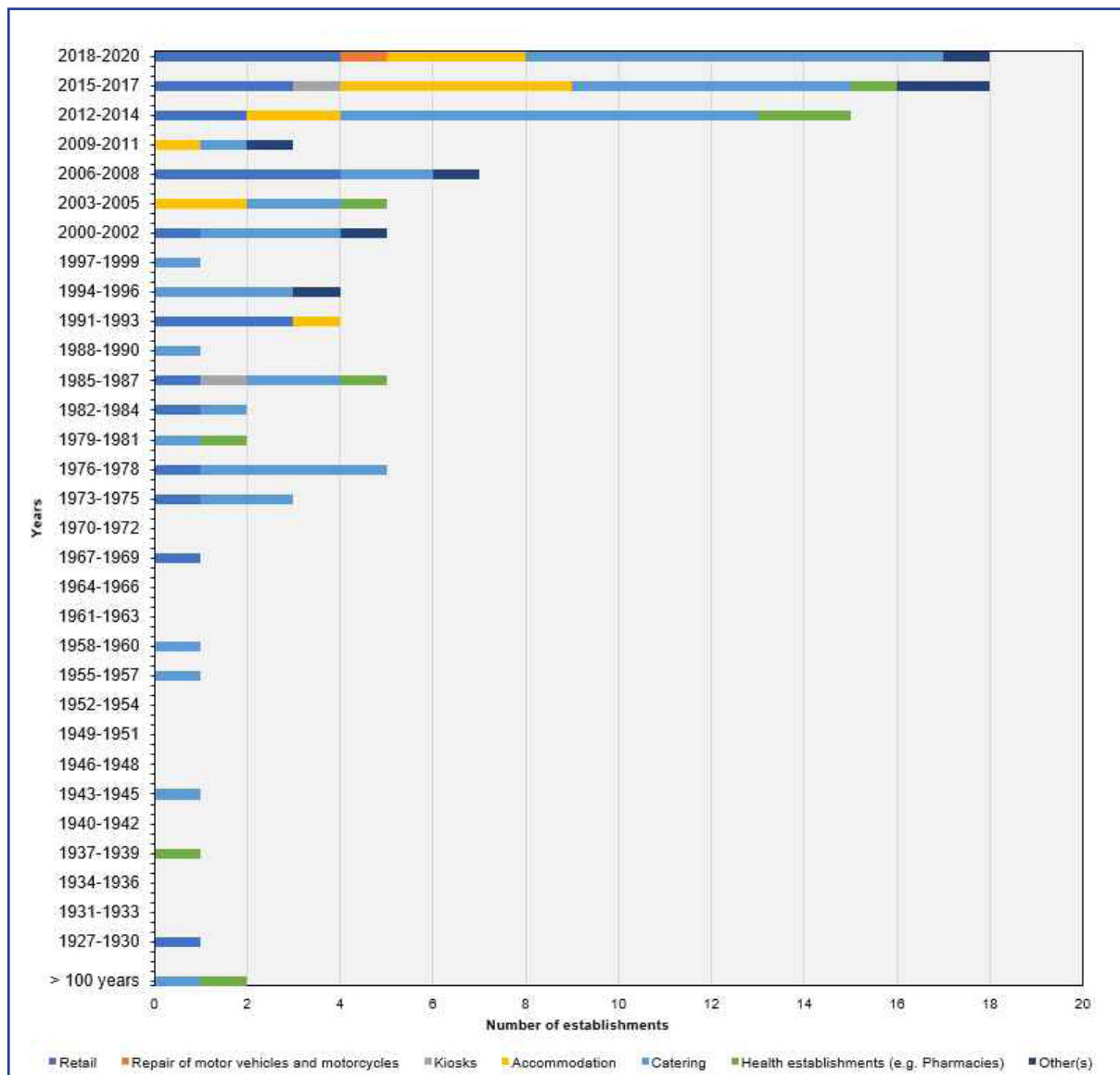
The Way of St. James doesn't constitute a major reason for opening an establishment, although the last decade appears to suggest a turning point in terms of how the Way is viewed as a touristic advantage to be explored. Of the establishments represented in the questionnaire, the oldest establishment which stated that the Way of St. James was the main reason for its opening, dates back to 2009.

In terms of catering services, 9.8% of respondents said that they decided to open because of the pilgrims / walkers passing by.

Figure 3: Main Establishments per Kilometre by Municipality on Portuguese Way Maia-Valença

Source: Authors' own elaboration based on fieldwork between 2020 and 2022

Figure 4- Number of Establishments Opened by Year, on the Portuguese Way (Maia-Valença)



Source: Authors' own elaboration based on survey in 2020 and 2021

Perceived Impacts on Businesses

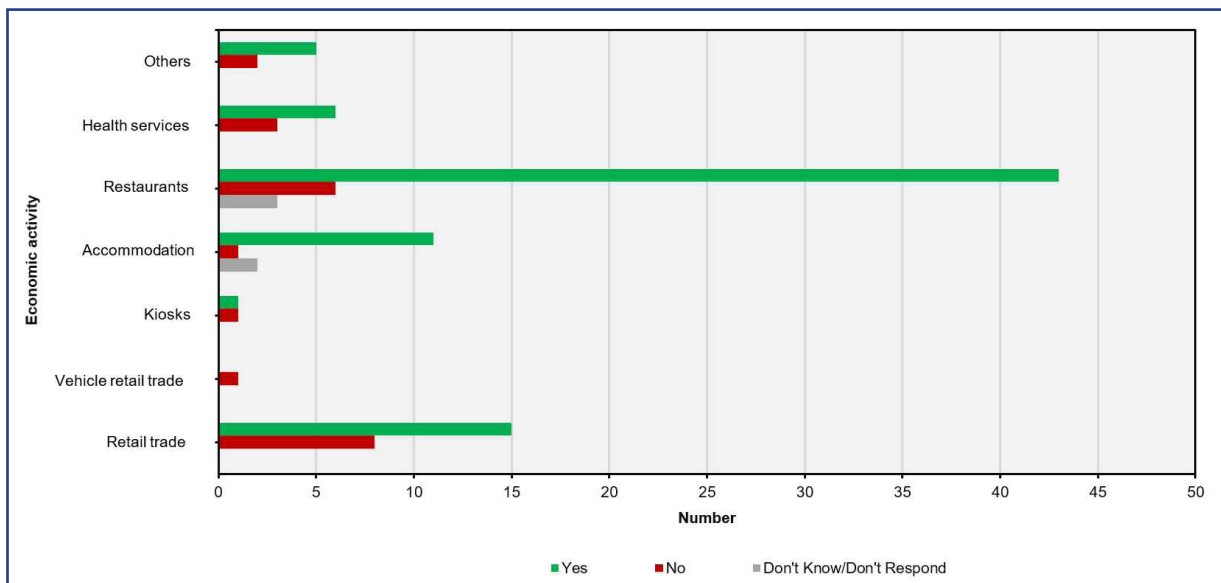
92.9% of all the respondents receive pilgrims in their establishments and 64.3% recorded an increase in the number of foreign pilgrims in the last three years before the COVID-19 pandemic (2017, 2018 and 2019). Almost 76% of respondents said that the Way had a positive impact on business volume between 2017 and 2019. 56.9% reported an increase of up to 30%. In terms of accommodation, 60.4% of respondents noted higher demand for overnight stays in the same period.

When questioned whether their establishment offered pilgrim-oriented services or goods, 57.1% responded positively. For businesses that stated they are providing

such services, the pilgrim menu was the most frequently-identified food option (51.2%), followed by lower prices (26.8%) and protein bars (22%). As for the shops and pharmacies that reported offering pilgrim-oriented goods 34.3% identified socks and 28.6% gel insoles. In terms of accommodation, the most frequently-identified services were laundry (40%), communal kitchen (30%) and foot massage (20%).

To respond to pilgrims' needs, 21.4% of respondents stated that they had invested to improve their establishments between 2017 and 2019. In this time period, primarily in 2019, most of the improvements (60.9%) concerned the remodulation of spaces.

Figure 5: Analysis by Economic Sector, Regarding Increase in Turnover Between 2017 and 2019



Source: Authors' own elaboration based on survey in 2020 and 2021

In response to the question ‘Has the fact that pilgrims passing through your establishment influenced the average price per product sold?’, 83.9% responded ‘no’. The question was considered by most respondents as being negative, i.e., whether the price per product had increased.

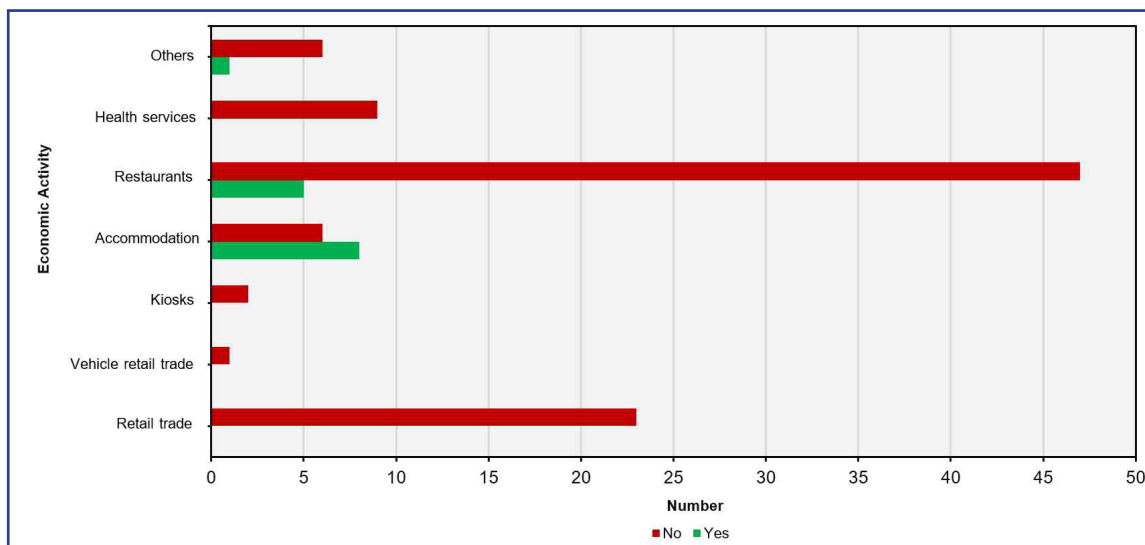
Regarding the overall impacts of the Way of St. James between 2017 and 2019, the majority of respondents stated that the Camino had a positive impact on the economy (65.2%) and tourism (62.5%).

Graphic Representation of Impacts

We now consider, in a graphic and aggregated form, the perception of operators on the economic and tourist impacts of the Camino de Santiago.

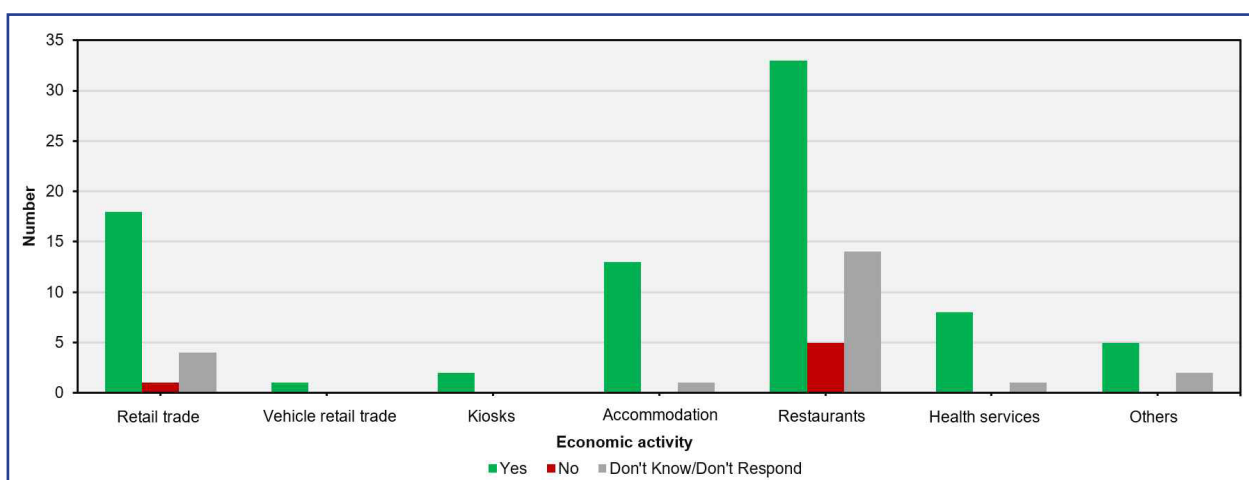
Business operators’ perceptions of the economic impacts of the Way of Saint James is very relevant in recent years. Almost 74% of respondents stated that their business has grown as a result of pilgrims. Almost every respondent stated that the Way contributed to the growth of profits

Figure 6: Analysis of Operators, by Sector, Regarding Influence of ‘Way of St. James’ on Opening of Business



Source: Authors' own elaboration based on survey in 2020 and 2021

Figure 7: Business Operators' Perception of Post-COVID-19 Business Recovery



Source: Authors' own elaboration based on survey in 2020 and 2021

between 2017 and 2019. This is due to the growth of pilgrims traversing the Way and also the fact that they sell products that pilgrims need, such as food, coffee, and accommodation. Most of the respondents work in cafés, restaurants and hostels, which are the most important establishments for pilgrims (Figure 5).

As mentioned above, the overwhelming majority of respondents did not open their establishment due to the passage of pilgrims along the Way of St. James. The opening of businesses primarily due to pilgrims was only recorded in the sectors that are more directly linked

to tourist activity (catering (n=5) and accommodation (n=8)) (Figure 6).

Impact of COVID-19

The COVID-19 pandemic situation had a major impact on businesses, primarily in 2020 and 2021, which reveals the importance of pilgrims for their core business. 2022 brought some economic recovery, but, some retail and catering providers felt reluctant to identify an economic recovery and the capacity to maintain the business. However, the majority of respondents believed that

Table 3: Relation Between Impacts and the Economic Sectors of the Portuguese Way between Maia-Valença - Business operators.

Impacts	Typology of economic activities							Anova F	p-value
	Retail trade	Vehicle repair trade	Kiosks	Accommodation	Restaurants	Health services	Others		
COVID-19 impacts on business	2.26	3.00	2.50	1.71	1.92	2.78	2.00	3.895	0.002*
Economic impacts of the Way of St. James	4.14	4.00	4.50	4.62	4.27	4.18	4.33	1.251	0.287
Impacts on tourism of the Camino de Santiago	4.14	4.00	5.00	4.57	4.26	4.20	4.17	3.092	0.008*

Likert scale was used to represent the data. In the case of COVID-19's impacts on business, a 5-level categorisation was established, based on the respondents' answers (1=very cautious, 5=very positive). *p < 0.05.

Source: Author's own elaboration based on the survey applied in 2020 and 2021

they will maintain their businesses in the post-pandemic situation (Figure 7).

An analysis of the relationship between impacts and the typology of economic activities shows significant differences both in the impacts on tourism associated with the Way of Saint James and the impacts of COVID-19 on business (Table 3).

In this manner, it is possible to identify that operators in the accommodation sector (average 1.71) and catering (average 1.92) are more cautious in the post-pandemic period. In fact, the accommodation sector is the one that suffered the greatest impacts from the COVID-19 pandemic. This is very clear in the way which operators in this sector have a more positive perspective of tourist activity (average of 4.57).

There are also significant differences between municipalities in terms of the economic impact of the Camino de Santiago ($F = 2,358$, $p\text{-value} < 0.05$). Business operators from the municipalities of Barcelos, Valença, Ponte de Lima and Paredes de Coura perceived more economic benefits than those from municipalities further south, who are less dependent on tourist activity linked to cultural tourism, and specifically, the Way of St. James. This pattern is clearly identified in Table 4.

Shortage of Economic Facilities

In relation to the scarcity of economic activities, most of the perceived shortfalls are accommodation (22.9%) and transport between the stages (24.8%). In a similar way, gaps in health service were also identified as shortfalls.

Comparing the gaps identified by respondents who are business operators with those identified by pilgrims (from a survey of 240 respondents that are not analysed in the present paper), we can conclude that businesses and pilgrims concur on several items.

The lack of water supply was the most reported shortfall identified by pilgrims along with the lack of information and signposting and the lack of accommodation. This was confirmed when we consider the evaluation of the three investigators who conducted fieldwork for this project. The key shortfalls identified related to the lack of drinking water supply; points that had information translated into other languages, besides Portuguese, along with the lack of the signposting with yellow arrows identifying the route. Additionally, there is a lack of places that permit the chance to rest and meditate along the Way. The existing rest and meditation places are concentrated in certain zones. In some municipalities there is a clear shortage of rest places. Finally, there is a need to attenuate some

Table 4: Relationship Between Impacts and the Various Municipalities of the Portuguese Way Maia-Valença

Impacts	Municipalities							Anova F	p-value
	Barcelos	Maia	Ponte de Lima	Póvoa de Varzim	Valença	Vila do Conde	Paredes de Coura		
COVID-19 impacts on business	2.03	2.00	2.13	2.00	2.07	2.10	2.50	0.262	0.953
Economic impacts of the Way of St. James	4.35	4.00	4.18	4.00	4.31	4.10	4.50	2.358	0.036*
Impacts on tourism of the Way of St. James	4.35	3.50	4.29	4.00	4.29	4.00	5.00	1.839	0.099

*Likert scale was used to represent the data. In the case of COVID-19's impacts on business, the 5-level categorisation was established based on the respondents' answers. * $p < 0.05$.*

Source: Author's own elaboration based on the survey applied in 2020 and 2021

of the physical dangers detected along the Way (e.g., the existence of crossroads, places where high-speed trains cross national roads, absence of pavements).

Regarding the supply points or sources of drinking water along the Way, although there are twenty-one sources of drinking water, this number is identified as being insufficient. Of these, six are drinking water supply points, with one that only contains information in Portuguese, and the rest with information in three languages. Although there are a large number of establishments that provide drinking water, there are pilgrims who may have a tight budget when travelling along the Way and, therefore, it should not be necessary to resort to bottled water if there were more places where they could access drinking water for free. This would also be a good intervention, since it would lead to a smaller ecological footprint by consuming less plastic.

It is worth noting the excellent work conducted by the parish council of Balugães in providing six points of supply of drinking water throughout their parish. The preceding parishes along the Way could emulate the same type of provision.

Another aspect that could be improved along the Way are the existing rest stops. Although these are sufficient in total number, they are either very far apart or very close to each other. It is recommended that, for every hour of walking, pilgrims should rest at least ten minutes, according to their needs, but there are not always suitable places for this purpose. Some benches and tables in granite or in another durable material could be a solution, preferably next to trees that offer shade.

Signposting with yellow arrows is a very important aspect to take into account, because the sections of the Way that are not well signposted and visible, can result in pilgrims becoming lost. This occasionally happens in the parish of Lijó, in the middle of the houses, and also near the Chapel of Santa Cruz, where the visibility of arrows is very low, sometimes pointing in different directions. An annual check is necessary for this extremely important factor of the route.

The questions about the consequences of the COVID-19 pandemic show that the establishments experienced

some difficulties during this period, but around 79% did not express any intention of shutting down their business. Only 6 of the 108 valid answers (5.5%) manifest very pessimistic prospects while most 14% of the responses to the question 'Do you think you will be able to continue developing the business after solving the COVID-19 problem?' were slightly pessimistic.

Analysis by Municipality

After the general analysis above, it is important to provide a more in-depth analysis of the information in the surveys. In view of the many variables collected a small selection were identified of importance, which answer the following questions:

Where are the different services concentrated?

Where are the services which opened due to the Way of St. James?

Where is there greater and lesser demand by pilgrims?

Where has increased business been recorded due to pilgrims?

What kind of activity has greater demand from pilgrims?

Where are the establishments with pilgrim-oriented services located?

Considering the location of establishments, the objective was to visualise their spatial distribution creating a density of points in the geographical area. The magnitude of the values represented is visualised by the intensity of the colour. A kernel density function calculates a magnitude per area for each point and is very common in Geographic Information Systems (GIS) Studies, in particular for the development of 'Risk Maps', Weather or Hot Spot detection maps. Here we can calculate the number of features per unit area, by constructing a continuous surface. Despite the common use in a GIS environment, fewer studies have tried to use this methodology in tourism analysis.

In analysing the density of service distribution, 5 hot spots can be found across the portion of The Way under investigation. There are two main clusters of establishments in the centre of the municipalities of Barcelos and Ponte de Lima (Figure 8). In the route between Maia and Barcelos and between Barcelos and

Ponte de Lima there is a long section that has little or no support services for pilgrims. There is a particularly poor concentration of services between Ponte de Lima and Valença.

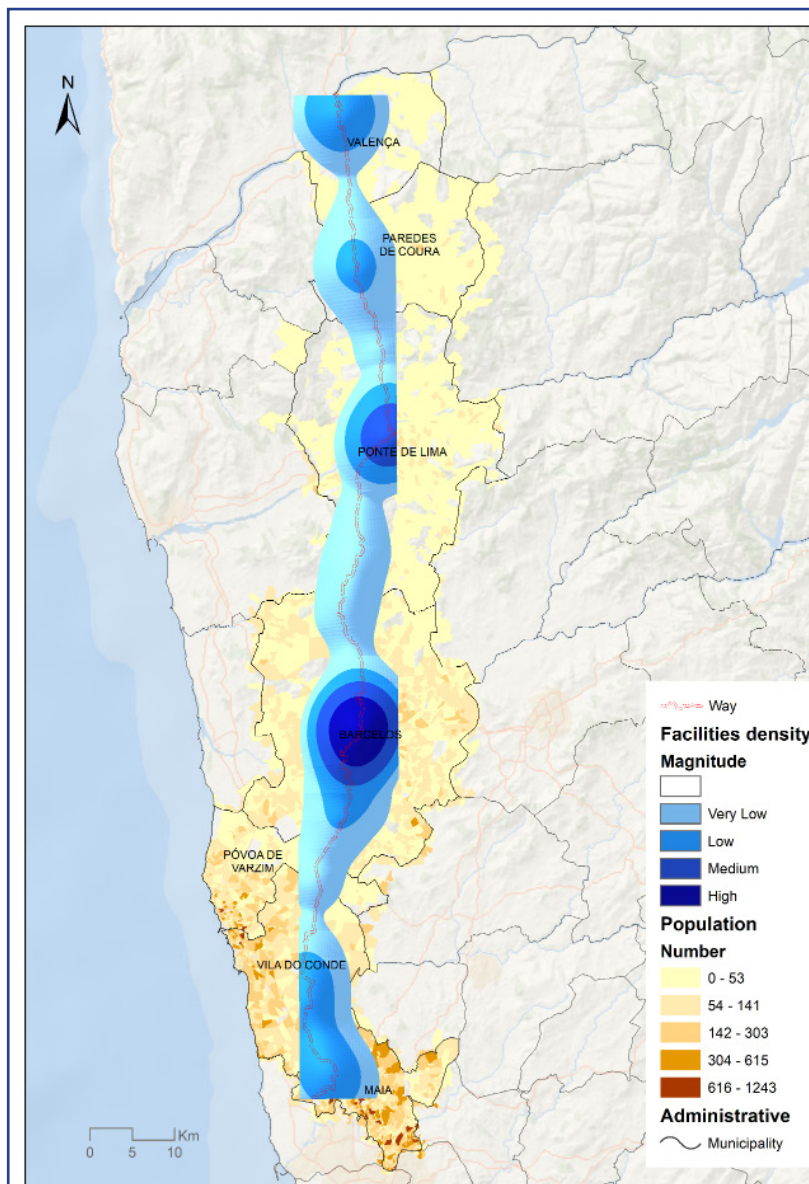
The municipalities of Barcelos, Vila do Conde, Ponte de Lima, and Valença, have larger medium-sized cities, and thus, allowed more in-depth analysis.

According to the analysis of the correlation between the activities and the municipalities in which they belong, catering activities represent the majority of services (Figure 2). The only exception to this, is in the municipality of Valença, where the retail trade seems

to be more dominant. There was a low number of questionnaires answered in all the other municipalities crossed by the Way, besides Vila do Conde, Barcelos, Ponte de Lima, and Valença, which made it impossible to draw more detailed conclusions.

The survey responses reveal that the majority of the establishments did not open because of the Way of St. James. About 78% of the respondents in Vila do Conde, 92% in Barcelos, 95% in Ponte de Lima, and 79% in Valença stated that the Way was not the reason for them opening their establishment.

Figure 8: Establishment Distribution - Kernel Density



Source: Authors' own elaboration based on fieldwork conducted in 2020 and 2022 and DGT, 2021

As for the business growth ('How much has your business increased over the last three years - 2017, 2018, and 2019?'), in Vila do Conde about 63% of respondents indicated business growth of up to 30% in the years of 2017, 2018 and 2019. In Barcelos, that percentage increased to 80%, whereas 38% stated that they recorded business growth between 40% and 70%. In the municipality of Ponte de Lima, the business growth seemed to be dispersed: 1/4 of business operators noted an increase up to 10% and 2/5 perceived an increase between 50% and 70%.

When analysing answers to the question 'In general, has the Way influenced tourist demand in your establishment?', most responded positively. About 30% of operators in the municipality of Barcelos said they had not benefited from the Way of St. James. As for the municipality of Ponte de Lima, 10.5% answered in the same manner. For Vila do Conde, the number was 20%, and 21.4% in Valença.

Concerning the existence of special pilgrim-oriented services or goods, we noticed that in Vila do Conde, 80% of respondents did not offer specific goods / services. In the municipality of Barcelos, 48% of the operators responded that they did not offer pilgrim-oriented services or goods. In Ponte de Lima that percentage decreased to 32% and to 29% in Valença (Table 5).

In conclusion, of the seven municipalities analysed, Barcelos seems to be less dependent on pilgrims, although prepared and functioning as a touristic city. It contains

the longest section of the Way and is the territory with the highest number of establishments available to pilgrims. Vila do Conde, conversely, is a city where the impact and importance of pilgrims is more keenly felt, and is the city that recorded the greatest increase in its business growth between 2017 and 2019.

Conclusions and Recommendations

The number of international tourists arriving in Santiago de Compostela has increased in recent years, highlighting the relevance of pilgrims along the Portuguese Way. Regardless of religious motivations, this paper has demonstrated the existence of several economic impacts caused by the opening or boosting of economic activities. It also noted that COVID-19 altered global relations, territorial balances and mobility. Business operators were affected by these changes and in the survey applied they expressed some doubts about the course of economic activity and tourism in the post-pandemic period.

As expected, the main results show that the Portuguese Way is diverse and has the potential to attract a significant number of pilgrims and tourists, wherein the diversification of the landscape and the different experiences across the four seasons offering a good potential for promotion. Nevertheless, several gaps were identified that require better planning and management of the Portuguese Way of St. James.

The main conclusions remind us that the Way of St. James offers economic opportunities for the territories through

Table 5: Establishments in Main Municipalities that Offer Pilgrim-oriented Services or Goods

Municipality	Establishments (N)	Have pilgrim-oriented goods/services (%)	Do not have pilgrim-oriented goods/services (%)
Maia	2	50	50
Vila do Conde	10	20	80
Póvoa de Varzim	1	100	0
Barcelos	61	52	48
Ponte de Lima	19	68	32
Paredes de Coura	5	100	0
Valença	14	71	29

Source: Author's own elaboration based on the survey applied in 2020 and 2021

which it passes. In order to identify ways to transcend the development of their business, the survey respondents recognised the value and importance of pilgrims, which is why they are looking for opportunities to promote the development of their business, by offering, in their establishments, certain typical offers for pilgrims, such as the most economical menus.

It is possible to verify a good relationship between pilgrims and business operators. Respondents agree that the Way has positive impacts both on the economy and tourism activity.

As for the practical contributions of this study, it is suggested that policymakers in the field of tourism planning and management offer the opportunity to involve different stakeholders (such as business operators) in the tourism decision-making process. Participation can enhance the positive effects of tourism and minimise its costs. If we think that operators have direct contact with host communities and visitors and tourists, this can help to strengthen the general sense of hospitality in the tourism destination through the selection of best practices.

Main Limitations

One of the main limitations inherent to this research project was related to the questionnaires administered to business operators about the economic impacts of the Way of St. James. First, during part of the research, COVID-19 obliged several establishments along the route to close, thus limiting the number of questionnaires. On the other hand, as in any type of research, not all operators were available to complete the questionnaires. In some cases, it was felt that many of the respondents were affected by the pandemic situation, and this was reflected in the type of approach and awareness that we implemented in application of the questionnaire.

Another limitation of the study was the inability to accurately measure perception of the effects of tourism and the impacts of the Camino de Santiago in municipalities such as Maia or Paredes de Coura due to the low number of responses obtained.

Future Research

There are several proposals that can be taken into consideration in the present and the near future in order to further our research, for example analysis of the role of the local authorities.

In first place we propose to analyse the cultural and religious expressions (e.g., piles of stones and writings on the stones and crosses) that occur in many municipalities of the Way of St. James (e.g., between Ponte de Lima and Valença). Also, to implement creative activities (co-creation) in places with a higher accommodation offer but less cultural offer. Many pilgrims reveal that they arrive early to the places where they will spend the night and in some there are no cultural activities available. Organising creative activities in co-creation with the local community might be a good solution.

It seems relevant to carry out research highlighting the profile and motivations of pilgrims through detailed analysis. Did the profile and motivations change with the COVID-19 pandemic? Comparing business operators' perspectives with those of pilgrims may also be relevant in the future, in order to assess the impacts of tourism growth and commercial exploitation of the Way of St. James.

Finally, we must look to the future to apply new questionnaires and confirm the changes in business operators' perceptions of impacts. Also, it may be useful to survey and undertake privileged interviews with some groups that influence or promote change (e.g., local decision makers, religious authorities, associations and tourism operators).

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