

28th  
January  
2016

# ALGARVE TOURISM PRODUCTS ASSESSMENT AND DEVELOPMENT ACTION PLAN



Prepared on behalf of



## Cycling & Walking



[www.tourismdev.com](http://www.tourismdev.com)

# Contents

## Introduction

1.	Situation Analysis .....	1
1.1	<b>Market Analysis</b> .....	<b>1</b>
1.1.1	Cycling and Walking Demand Trends.....	1
1.1.2	International Trade Survey .....	3
1.1.3	Conclusions.....	7
1.2	<b>Product Assessment</b> .....	<b>8</b>
1.2.1	Walking Routes Conclusions .....	8
1.2.2	Cycling Routes Conclusions .....	12
1.2.3	Hotel and Activity Providers.....	15
1.3	<b>Best Practice Case Studies</b> .....	<b>18</b>
1.4	<b>SWOT Analysis</b> .....	<b>20</b>
1.4.1	Strengths .....	21
1.4.2	Weaknesses .....	22
1.4.3	Opportunities.....	23
1.4.4	Threats.....	24
1.5	<b>Stakeholder Map</b> .....	<b>25</b>
2.	Vision and Development Strategy .....	29
2.1	<b>Project Objective</b> .....	<b>29</b>
2.2	<b>Proposition and Vision</b> .....	<b>29</b>
2.2.1	The Proposition .....	29
2.2.2	The Vision.....	30
2.3	<b>Strategic Objectives</b> .....	<b>31</b>
2.4	<b>Recommended Strategies</b> .....	<b>32</b>
2.4.1	Organisation and Management .....	33
2.4.2	Product Development – Cycling.....	39
2.4.3	Product Development – Walking .....	46
2.4.4	Product Enablers and Quality Management.....	52
2.4.5	Accommodation Diversification and Development.....	62
2.4.6	Access.....	64
2.4.7	Sales Development and Marketing Communications.....	65
3.	Action Plan.....	79
3.1	<b>Prioritised Actions</b> .....	<b>80</b>
3.2	<b>Organisation and Management</b> .....	<b>83</b>
3.2.1	Programme 1: Create Strategic Leadership Organisation.....	83
3.2.2	Programme 2: Trail Management .....	84
3.2.3	Programme 3: Stakeholder Coordination.....	86
3.3	<b>Product Development - Cycling</b> .....	<b>87</b>
3.3.1	Programme 4: Ecovia Flagship Attraction .....	87
3.3.2	Programme 5: Looped Local Cycling Routes and Greenways .....	88
3.3.3	Programme 6: Mountain Biking.....	89
3.3.4	Programme 7: Supporting Measures - Cycling .....	90
3.4	<b>Product Development: Walking</b> .....	<b>91</b>
3.4.1	Programme 8: Ecovia do Algarve.....	91
3.4.2	Programme 9: Enhance Rota Vicentina, Via Algarviana, Grande .....	91
	Rota do Guadiana .....	91

3.4.3	Programme 10: Local Walking Routes.....	92
3.4.4	Programme 11: Visitor Safety.....	92
3.4.5	Programme 12: Supporting Measures - Walking .....	93
<b>3.5</b>	<b>Product Enablers and Quality Management.....</b>	<b>94</b>
3.5.1	Programme 13: Improve Visitor Access.....	94
3.5.2	Programme 14: Capacity Building .....	95
3.5.3	Programme 15: Data Collection and Visitor Monitoring.....	96
3.5.4	Programme 16: Standardisation .....	97
3.5.5	Programme 17: Sustainable Development .....	99
<b>3.6</b>	<b>Accommodation Diversification and Development .....</b>	<b>100</b>
3.6.1	Programme 18: Familiarisation & Training.....	100
3.6.2	Programme 19: Facility Upgrade.....	101
3.6.3	Programme 20: Rural Tourism Accommodation .....	101
<b>3.7</b>	<b>Access .....</b>	<b>102</b>
3.7.1	Programme 21: Enabling Better Access.....	102
<b>3.8</b>	<b>Sales Development and Marketing Communications.....</b>	<b>103</b>
3.8.1	Programme 22: Algarve Cycling and Walking Roadshow in Main Markets .....	103
3.8.2	Programme 23: Communications and Awareness Development among Algarve Accommodation Operators .....	104
3.8.3	Programme 24: Business to Business (B2B) and Business to Consumer (B2C).....	104
3.8.4	Programme 25: Algarve Walking Festival .....	105
3.8.5	Programme 26: Market Awareness of the Algarve's Cycling and Walking Opportunities .....	106
3.8.6	Programme 27: Website: the Key Marketing and Promotional Tool .....	109
3.8.7	Programme 28: Events and Festivals.....	111
<b>4.</b>	<b>Indicative Action Plan Cost by Programme .....</b>	<b>112</b>
<b>4.1</b>	<b>Indicative Costs .....</b>	<b>112</b>
<b>4.2</b>	<b>Funding Mechanisms &amp; Engagement Model .....</b>	<b>112</b>

# Introduction

## Introduction

This final draft report has been prepared by Tourism Development International (TDI) on behalf of ANA Aeroportos de Portugal, in association with Turismo de Portugal and Turismo do Algarve. The report, *Algarve Tourism Products Assessment and Development Action Plan – Cycling and Walking* has been conducted over a four month timeframe commencing 1<sup>st</sup> September 2015.

The report seeks to address the need to diversify the Algarve tourism product that is currently over dependent on Sun and Sea (beach) tourism resulting in a high seasonality factor.

## Background

Faro Airport is the gateway to the Algarve and the South of Portugal. Algarve is Portugal's main tourist area, having approximately 42% of total tourist bed nights. Tourism is the main economic activity of the region, representing approximately 60% of employment and 66% of GDP. In 2014 it processed just over 6 million passengers being ranked 69th in Europe behind Bristol Airport. In the last 10 years, passengers AAGR was 2.4%. The four biggest markets (UK, Germany, Netherlands and Ireland) have a market share of 90% and have remained flat over the last 10 years.

Air travel demand is very much dependent on the catchment area's socio-economic activities. At Faro airport, demand originates almost exclusively from incoming tourism in the region. The region consists, primarily, of a family destination for sun and sea. The high dependence on sun and sea, results in high seasonal demand, particularly during the summer months. In four summer months it processes 54% of total annual traffic. In August, passenger throughput is almost 10 times more than in January. This is no different from other southern European sun and sea destinations in Spain and Greece where there is a traditional reliance on excellent beaches and climate on that period. Leisure travel is particularly price sensitive and highly affected by travel trends and/or promotion of alternative tourist destinations.

## Objectives

The overall objective is to develop a plan that will guide stakeholders in the task of diversifying market segments attracted to the Algarve beyond those coming for sun and sea. The beach PLUS segments that the Algarve is seeking to target have been identified as residential, wellness, nature, nautical, meeting industry, touring, cycling, hiking, wine and gastronomy.

Cycling and walking have been selected to be the first two products to be examined due to their scale and growth potential.

Specific requirements to be addressed in the study were:

- To undertake an **overall assessment** of the current cycling and walking product in the Algarve
- To specify the structure, roles and responsibilities of an umbrella organisation to oversee the development and management of the adventure activity sectors in the Algarve
- To prepare **product development** recommendations
- To prepare **product marketing** recommendations
- To prepare **case studies** on destinations that have successfully broadened the seasonality of their tourism



# MAP 1: Algarve Study Area

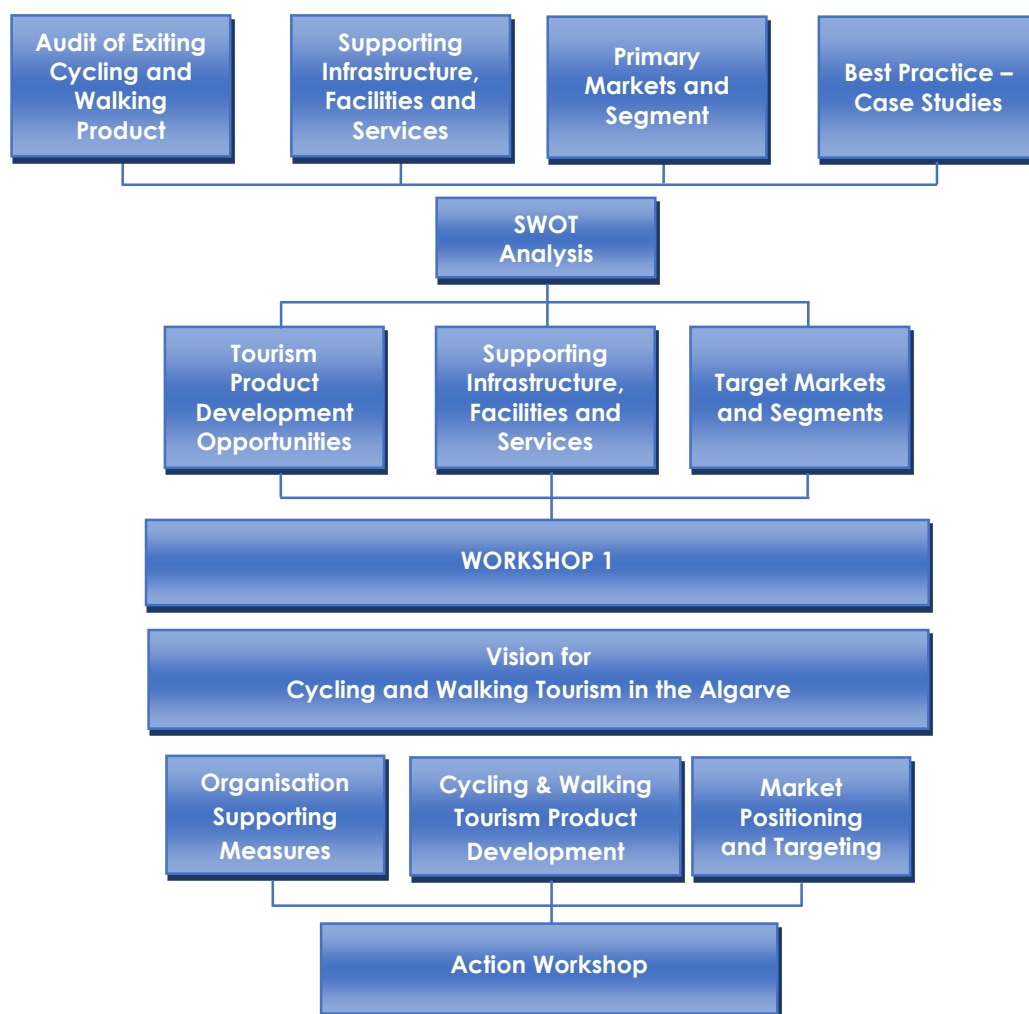


**KEY:**

-  Rail Line
-  Roads
-  Settlements
-  Airport
-  National Parks

## Methodology

In undertaking the *Algarve Tourism Products Assessment and Development Action Plan – Cycling and Walking*, TDI put in place a comprehensive programme of research and consultations comprising an audit of cycling and walking product, stakeholder consultations, a trade survey with local and international operators, and best practice case studies. TDI also attended a Cycling Meeting/Workshop in Palma, Majorca with Turismo de Portugal officials on October 8<sup>th</sup>/9<sup>th</sup> 2015.



**A detailed analysis from the findings of the market research and consultation programme is presented as a separate document – Stage 1 Situation Analysis.**

The outcome of the study has focused on seven key action areas which are presented in this report. These include:

- Organisation and Management;
- Product Development – Cycling;
- Product Development – Walking;
- Product Enablers and Quality Management;
- Accommodation Diversification and Development;
- Access;
- Marketing.



While each of these programme areas are considered to be essential to the overall success of the initiative; the identification of a governance model, to provide clear and strategic leadership for the development and promotion of cycling and walking in the Algarve, was considered critical to provide leadership and coordination in the sector.

### Acknowledgements

The TDI consultancy team would like to acknowledge the invaluable inputs and assistance given by executives of ANA Aeroportos de Portugal, Turismo de Portugal, and Turismo do Algarve.

We are also grateful for the input and support of cycling and walking stakeholders in the Algarve and in the international markets who gave their time to participate in the consultation process.

Tourism Development International  
8<sup>th</sup> January 2016





# 1. Situation Analysis

## 1.1 Market Analysis

### 1.1.1 Cycling and Walking Demand Trends

On average, one-in-four international trips from the main source markets are for 'soft' adventure.

Overall adventure travel now amounts to an estimated 150 million travellers from the three main source regions of North America, Latin America and Europe. On average, one-in-four international trips taken from these regions are 'soft' adventure trips, with 43% of Europeans indicating that they would take a 'soft adventure' trip on their next holiday.

The market analysis of the cycling and walking segments of the international tourism market indicate that these activities are experiencing demand growth above the average for all leisure tourism, reflecting the overall rise in demand for adventure tourism, both "hard" and "soft" forms.

Drawing on the EU Directorate General for Internal Policies 2012 report on cycling participation related to the Eurostat data on overseas holiday trips, estimates are presented in Figure 1 of the level of overseas cycling trips by market. For most markets, the share of cycling trips of all holidays according to the EU DGIP report is between 1 and 3% with the Dutch leading the way at 3.7%. Between 90 and 95% overnight cycling trips are taken within the cyclist's own country. The estimates in Figure 1 are derived by applying the proportion of total trips that involve a cycling component (from the EU DGUP report) to the total number of trips (from Eurostat for 2014), with an estimated average of 7.5% being to overseas destinations.

The 13 markets covered in Figure 1 account for a total of between 1.3 and 1.5 million overseas cycling overnight trips. Allowing for other European markets, the overall total market for overseas cycling trips involving an overnight stay is 2 million. Assessment of prospects for the Algarve is based on the feedback from TDI's research both in the Algarve and with international operators, using a three tier system of low, medium and high.

In relation to walking, research undertaken by Fáilte Ireland identifies the core market of dedicated walkers in the United Kingdom, Germany and France as 8 million in each case. The figures given in Figure 1 assume that 5 to 10% of these core markets engage in overseas walking trips each year. Calculations for other markets are calculated on a pro rata basis to their level of outbound trip making. Again, future prospects for the Algarve are assessed as low, medium, or high, based on the research findings from TDI's enquiries with the specialist travel trade.

**Figure 1: Assessment of Scale and Opportunity for Overseas Cycling and Walking Trips by Market**

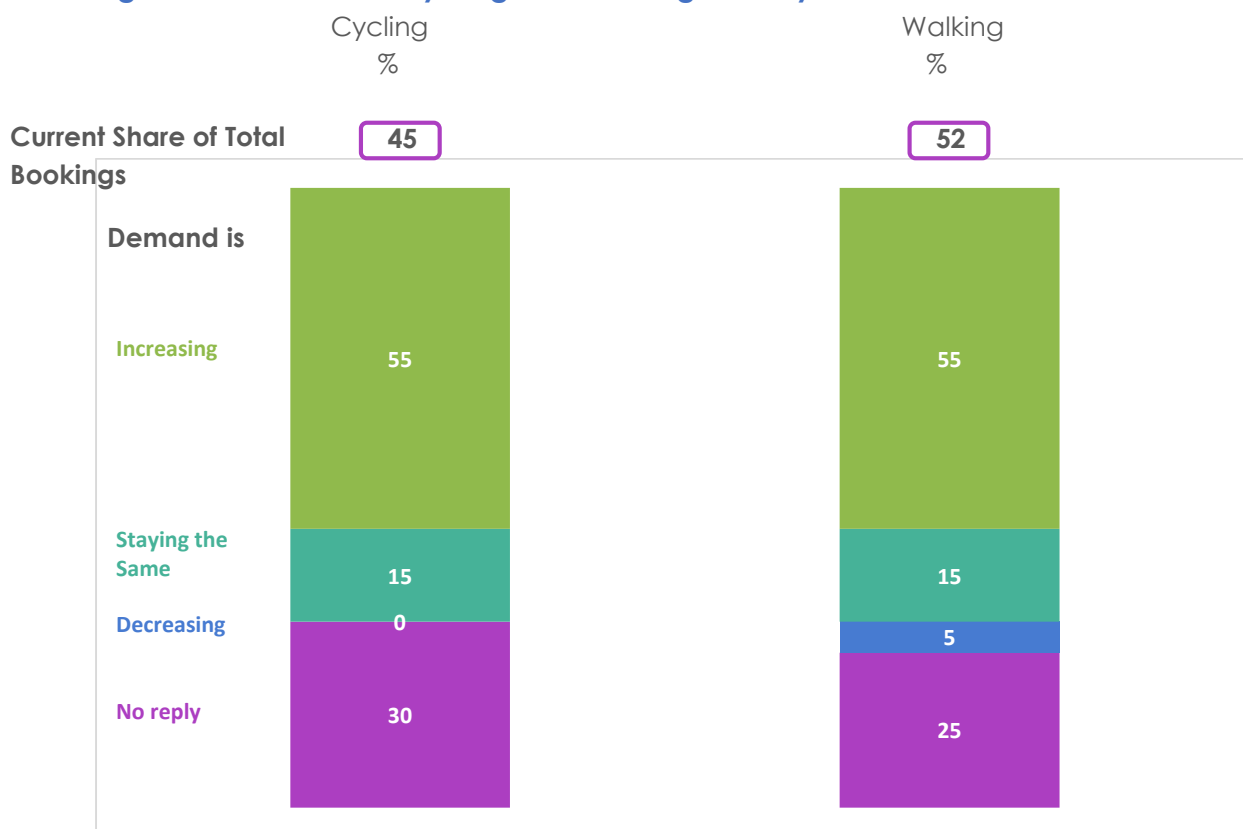
Source Market	Cycling		Walking	
	Present Demand	Growth Potential	Present Demand	Growth Potential
United Kingdom	100 -125,000	Medium to High	500 – 600,000	High
Germany	500,000	Medium to High	500 – 600,000	High
Netherlands	100 - 125,000	Medium to High	100 – 125,000	Medium to High
Ireland	7,500 - 10,000	Medium to High	20 – 30,000	Medium to High
Spain	20 - 30,000	Low to Medium	20 - 30,000	Low to Medium
France	250,000	Medium	500 – 600,000	Medium to High
Belgium	30,000	Medium	30,000	Medium
Sweden	75 – 100,000	Medium	100 – 120,000	Medium
Poland	50 - 75,000	Medium	30 – 40,000	Medium
Switzerland	40 - 50,000	Medium	50 – 60,000	Medium
Denmark	50 - 75,000	Medium	80 – 100,000	Medium
Italy	30 – 50,000	Low to Medium	30 – 40,000	Low to Medium
Austria	40 - 50,000	Medium	50 – 60,000	Medium

### 1.1.2 International Trade Survey

TDI conducted on-line interviews with 20 international travel trade representatives. The sample comprised specialist cycling and walking operators, and walking clubs in Algarve's key markets.

A majority of International trade representatives reported an increase in demand for both cycling and walking.

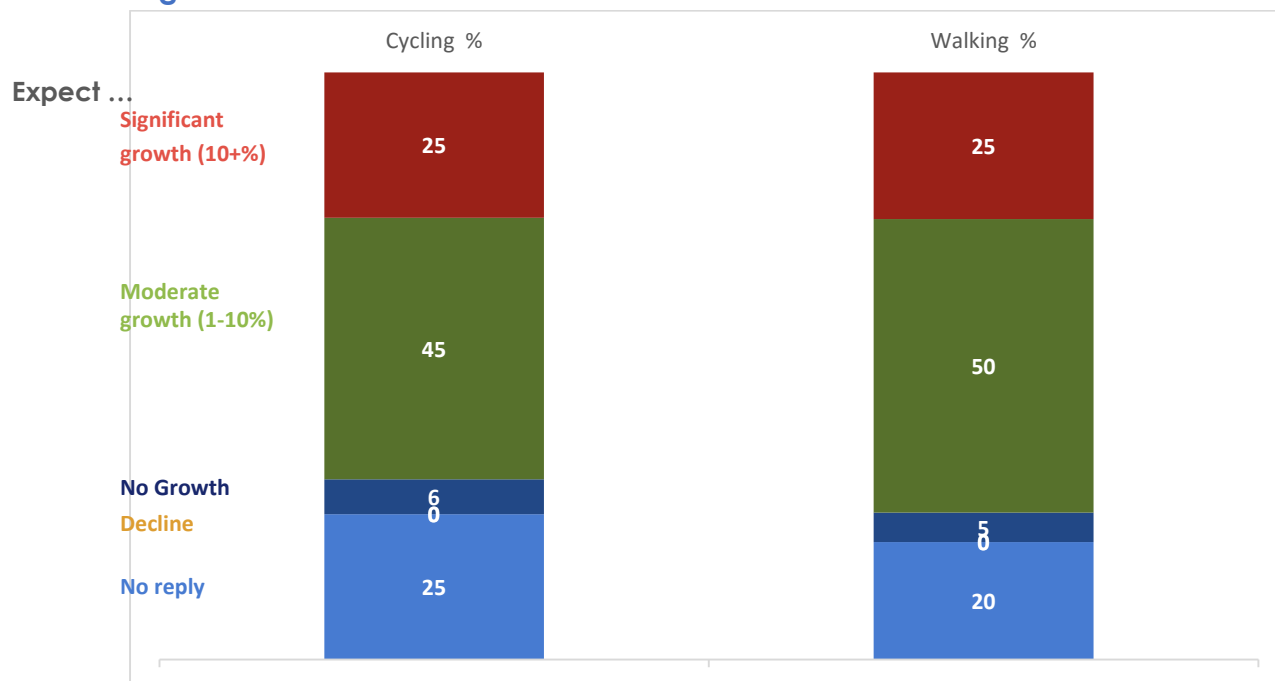
**Figure 2: Demand for Cycling and Walking Holidays**



Source: International Trade Survey

International trade representatives interviewed in this survey expect demand for cycling and walking in the Algarve to grow over the next 3 years.

**Figure 3: Assessment of Level of Demand for Cycling and Walking Holidays in the Algarve over the next 3 Years**



Source: International Trade Survey

The segments considered by the international trade to offer the best potential for walking in the Algarve are:

- Men and women
- Middle aged (45-65)
- Individuals, couples and small groups

Walking in the Algarve is considered to appeal to first time visitors to the region and repeat visitors in more or less equal measure.

The segments considered to offer the best potential for cycling in the Algarve are:

- First time visitors
- Men and women
- Middle aged (45-55)
- Couples, small groups, individuals and families

In terms of category/type of cycling, touring is seen as having the greatest potential where the Algarve is concerned. The international trade also identify road cycling and mountain biking as offering some potential.

**Figure 4: Segments Considered to Offer the Best Potential for Cycling and Walking Holidays in the Algarve**

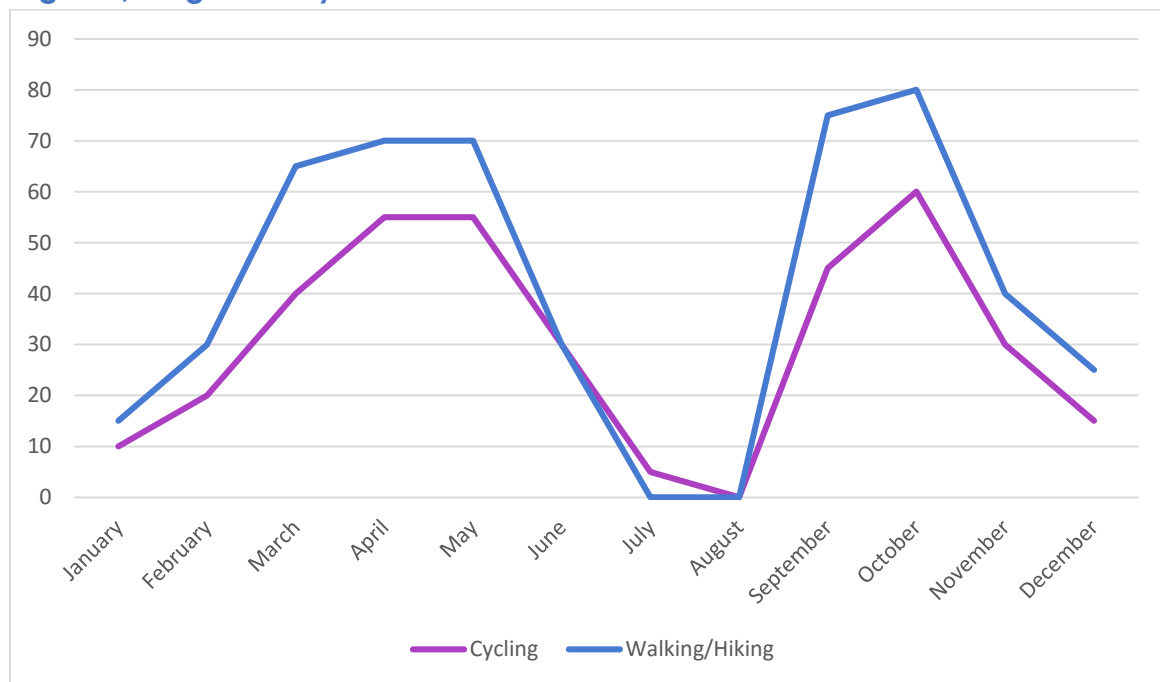
		Cycling	Walking
<b>Gender</b>		<b>%</b>	<b>%</b>
	Male	35	40
	Female	40	65
	No reply	45	25
<b>Age</b>		<b>%</b>	<b>%</b>
	Under 25	-	-
	26-35	10	-
	36-45	20	20
	46-55	45	50
	56-65	30	65
	65+	5	30
	No reply	40	20
<b>Party Composition</b>		<b>%</b>	<b>%</b>
	Individuals	30	50
	Couples	45	60
	Families	20	-
	Small adult group	40	55
	Other adult group	5	5
	Professionals	10	10
	No reply	40	20
<b>First Time Vs Repeat Visitors</b>		<b>%</b>	<b>%</b>
	First time visitors	56	50
	Repeat visitors to the Algarve	13	45
	No reply	31	25
<b>Cycling Type</b>		<b>%</b>	
	Touring	45	
	Road Cycling	15	
	Mountain Biking	15	
	No reply	35	

Source: International Trade Survey

The early shoulder months of March, April and May, together with the late shoulder months of September, October, and (to a lesser extent) November, are identified as the time of the year representing the best potential for walking in the Algarve. Even the winter months (December – February) are considered suitable for walking.

A similar pattern is evident in respect of the perceived seasonal pattern of demand for cycling with both Spring and Autumn considered as offering the best potential.

**Figure 5: Months Representing the Best Potential for Cycling and Walking in the Algarve/Length of Stay**



Cycling %

Walking %

Average Days Spent in Algarve

7.08

7.57

Source: International Trade Survey



### 1.1.3 Conclusions

The key conclusions that can be drawn from the market analysis are as follows:

#### Cycling

- The demand for cycling overnight trips is of the order of 23 million with around 2 million of these in the form of overseas cycling holidays;
- Cycling tourism **demand is growing**, a trend which is confirmed by the results of the Local Trade Survey and International Tourism Trade Survey undertaken for this project;
- The overnight cycling market comprises three broad segments: road cycling (where the activity is the primary concern), touring cycling (where the destination is as important as the activity), and mountain biking;
- Demand for cycling holidays in the Algarve is **expected to grow** over the next 3 years;
- The UK, the Netherlands and Germany are the principal source markets for cycling tourism to the Algarve, though other northern, western and eastern European markets show good growth potential;
- The segments considered to offer the best potential for cycling in the Algarve are:
  - First time visitors
  - Men and women equally
  - Middle aged (45-55)
  - Couples, small groups, individuals and families;
- Where the Algarve is concerned, in terms of type of cycling, **touring** is seen as having the greatest potential;
- The early shoulder months of **March, April and May**, together with later shoulder months of **September, October** (and to a lesser extent **November**) are the times of the year considered to offer the best potential for cycling in the Algarve;
- The international travel trade estimate the **average length of stay** for cyclists visiting the Algarve at **7.08** days.



Demand for cycling holidays in the Algarve is expected to grow over the next 3 years

#### Walking

- Evidence at a national level indicates both that the incidence of **walking is growing** and more destinations are recognising the opportunities to combine culture and nature with walking;

- This demand pattern for walking holidays is confirmed by international tourism trade representatives. Demand for the activity in Britain and Ireland would appear to be growing at an even faster rate;
- Walkers fall into two broad groups: dedicated enthusiasts looking for longer, more demanding trails, and enthusiastic amateurs with varying requirements in respect of associated interest in the Algarve and type of trail;
- Demand for walking holidays in the Algarve is expected to grow over the next 3 years;
- The Netherlands, Germany and the UK are the principal source markets for walking tourism to the Algarve, accounting for two-thirds of demand, with other European markets showing growing demand, such as France and Poland;
- The segments considered to offer the best potential for walking in the Algarve are:
  - Men and women equally
  - Middle aged (45-65)
  - Individuals, couples and small groups,
- Similar to the pattern of demand for cycling, the spring and autumn months are considered to offer the best potential for walking in the Algarve,
- The average length of stay for walkers in the Algarve is estimated at 7.5 days.

Demand for walking holidays in the Algarve is expected to grow over the next 3 years

## 1.2 Product Assessment

### 1.2.1 Walking Routes Conclusions

Conclusions that can be made from the walking product analysis are that:

The Algarve has some world class walking trails. The variety of the scenery from the wild and scenic west coast to the tranquil Ria Formosa and the beautiful Guadiana river valley make for a significant resource. The development of three multi-day walking trails, along the east and west coast and diagonally across the country through spectacular mountain scenery and traditional villages provides great variety of recreational opportunity.

There are significant issues and variance of quality in implementation. The Rota Vicentina trails are difficult to fault in terms of implementation with the quality of the trails, signage, website, maps and guides as well thought through as the overall management and promotion of the trail network.



The Via Algarviana has great potential and while tremendous work is being done with the minimal resources available, a focussed programme of investment is required to enable this trail network to reach both its obvious potential both as a recreational resource and a means of enhancing rural livelihoods. A means of providing sustainable long term funding through use of an associative model, similar to Rota Vicentina, would help place the trail on secure footing.

The Grande Rota do Guadiana has been implemented well by Odiana Association which has a well-earned reputation for the development of well managed trails. However with almost 20% of the trail on tarmac road surface, further consideration of agreements with local landowners to reduce this proportion could bring the trail closer to the river Guadiana and make it a more attractive proposition for tour operators.

There are many local walking routes which are managed by a wide variety of organisations with varying quality of infrastructure and signage. These include rural development agencies such as Odiana Association, In Loco; agencies managing the long distance trails such as Almargem and Rota Vicentina Association; state bodies such as ICNF; municipal councils; and CCDR-Algarve.

[There is no single database of all of these walking routes](#) and no way for visitors to consider which walk would suit them best e.g. family friendly routes.

[There is no standardisation of approach to signage or to trail surfacing/grading.](#) The lack of (standardised) trail signage is highlighted as a significant weakness by international tourism trade executives. Poor road signage is also an issue.



The official print publication for walking trails is not adequate. While it is accepted that a selection had to be made to enable a shortlist for a publication, it is likely that print media is not the optimum format for the primary promotion of walking trails, given the need to update information, and to provide the type of data expected by international visitors such as digital maps, accommodation and transport. This issue is also highlighted as a weakness by the international trade.

There are some high quality unofficial publications such as 'Walking in the Algarve' by Julie Statham, sold online for many years that enable experienced walkers to locate and walk interesting trails. In general the quality of information, such as maps, provided in this publication is of a significantly higher quality than the Turismo do Algarve publication. A further observation would be that

some of the trails in this publication are better located and cover places which have been omitted from the official guide, such as the Roman ruins Milreu at Estoi.

The system of naming *Pequenas Rotas*, i.e. PR MCQ 1 for a route in Monchique Municipality, is confusing to those unaware of statutory boundaries. There is currently no standardised approach to the naming of shorter routes with a variety of terms such as Percursos Complementares/Complementary Paths or Pequenas Routes or Percorso Pedestre used. It would be clearer if these were all referred to as 'Local Routes' at a regional level in line with international best practice.

Some very popular local walking routes are in dangerous condition and should be immediately closed and assessed by experienced engineers. An example would be the popular Lagos to Praia do Pinhão route which runs along a very heavily eroded cliff top. The route, barricades and wooden stair infrastructure on this trail and on the beach are all dangerously unstable and likely to cause an imminent fatality in the current condition. See image overleaf for example which shows an eroded pathway, open to the public, with a 30m drop to rocks.

Some routes with great potential such as the start of the Salema to Sagres route require some intervention to make them safe for all levels of walkers such as short sections of boardwalk.

The walking route evaluation matrix, shown in Figure 6 below, clearly indicates the comparative high overall standard of the Rota Vicentina which only failed to achieve a full score due the current lack of an app, which is fairly minor in comparison to the other positive points. Both the Via Algarviana and Grande Rota do Guadiana would benefit from improved marketing. Increased and secure funding for the Via Algarviana would enable it to improve the trail condition, signage and website. The Grande Rota do Guadiana lacks visitor information (website, maps, guides) which bring down its comparative score. Local walking routes are harder to score as there is great variance in quality with many of the trails managed by Odiana Association, Rota Vicentina Association and Almargem of good quality. Some of the trails that were reviewed that were managed by ICNF are significantly underfunded and require investment in signage and trail quality.



Figure 6: Walking Route Evaluation Matrix

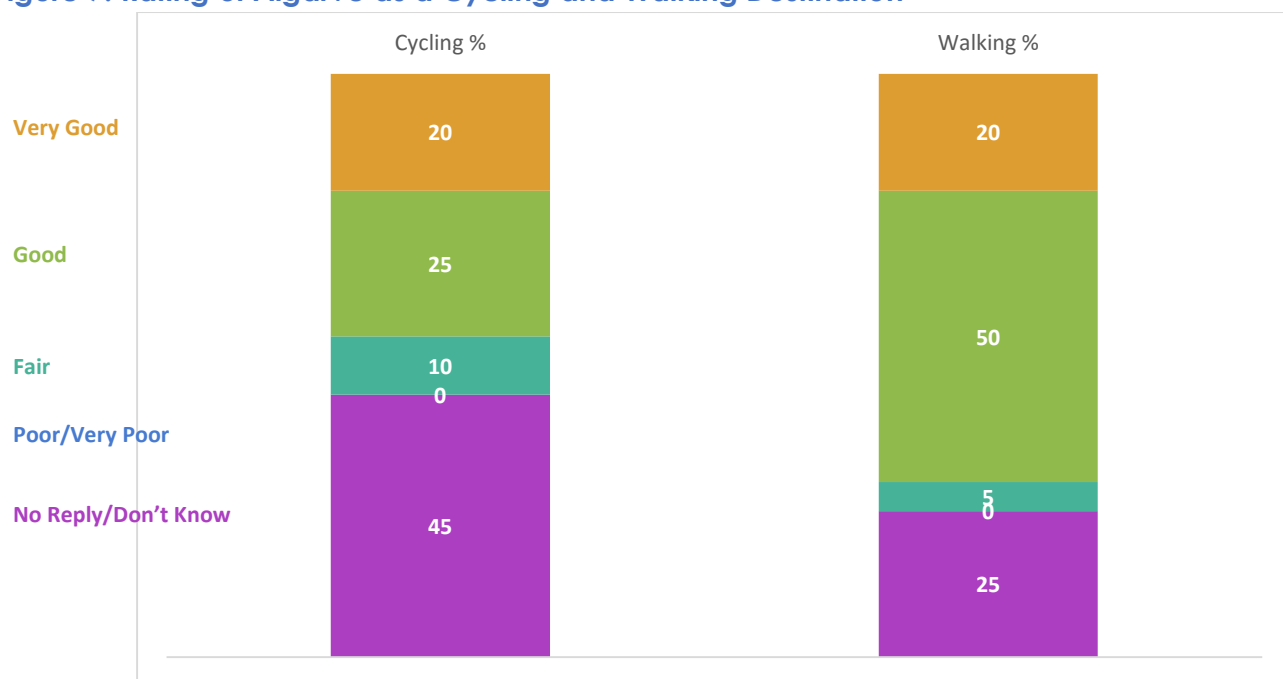
Criteria	Regional Routes			Local routes (except those alongside longer routes)	City/ Town Routes
	Rota Vicentina	Via Algarviana	Grande Rota do Guadiana		
Condition	***	**	**	**	*
Directional Signage	***	**	**	*	*
Orientation/ interpretative signage	***	**	**	*	*
Management	***	**	**	**	*
Maintenance	***	**	**	**	*
Website information	***	**	*	*	*
Maps, apps and guides	**	**	*	*	*
Local linkages e.g. accommodation, transport	***	**	**	**	*
Marketing/Promotion	***	*	*	*	*
	<b>26</b>	<b>17</b>	<b>15</b>	<b>13</b>	<b>9</b>

Where \*\*\* = Excellent, \*\* = Satisfactory, \* = Poor

### 1.2.2 Cycling Routes Conclusions

The evidence from the international tourism trade survey would indicate that the Algarve is not currently as well known for cycling as it is for walking. This fact notwithstanding, amongst those executives who gave an opinion, Algarve achieved a satisfactory rating.

Figure 7: Rating of Algarve as a Cycling and Walking Destination



Source: International Trade Survey

As with the strengths identified for the Algarve as a walking destination, climate, safety/security, friendliness of the local people, and natural heritage were identified as attributes where cycling is concerned. The availability of quiet roads away from the coast was also mentioned in a positive vein.

Other conclusions that can be made with regards to cycling are that:

The Algarve has the potential to be one of the world's great cycling destinations.

The Algarve has the potential to be one of the world's great cycling destinations. It has many of the attributes of popular European cycling destinations like Mallorca with a variety of topography and a better year-round climate. Visitors surveyed by Megasport indicated that the Ecovia do Litoral cycle route has the potential to be one of the top two coastal cycle trails in the world, with the other being Puglia in Italy.



At the moment the potential of cycle tourism has not been reflected in the regional marketing campaigns, nor has there been buy in from the public/private sector to the development of cycle trail development – however it could be suggested that they are waiting for a strategic lead to be taken on this.

**There are significant issues and variance of quality in implementation.**

Issues with those long distance trails which can also be ridden by mountain-bike are similar to those indicated above for walking. The Rota Vicentina Historical Way can be ridden but it is not currently marketed due to the potential for conflict with walkers. There is immense potential for the development of a complementary cycling route along the Rota Vicentina corridor between Cape St Vincent and northwards to Alentejo and on up to Lisbon. The Via Algarviana has great potential as a mountain-biking trail but only users with some experience could currently complete the trail. With investment a wider range of users to could be involved. The Grande Rota do Guadiana has potential as a mountain-biking trail and would benefit from targeted appropriate information for mountain bike users. The Guadiana corridor also has great potential as a cycle touring route and the quiet good quality riverside road would make a spectacular 1-2 day cycle between Vila Real do S. Antonio and Alcoutim and possibly further north to Mertola in Alentejo).



The Ecovia do Litoral has huge potential as a coastal cycle touring route and is currently the subject of a development programme as part of the Eurovelo 1 scheme. There is significant opportunity to prioritise the development of this route, on a phased basis as a flagship attraction. However currently some sections of the Ecovia do Litoral are very dangerous. While there is historical cause, the practice of directing visitors to cycle alongside a dual carriageway, alongside the N125 for example between Faro and Olhão is against international best-practice and visitor expectations need to be managed and visitor safety prioritised.

There are many mountain-biking routes which are managed by many organisations with varying quality of infrastructure and signage. These include rural development agencies such as Odiana Association; agencies managing the long distance trails such as Almargem and Rota Vicentina Association; and municipal council such as Loulé Municipal Council which has produced an associated publication. These provide a significant recreational opportunity and could be promoted at a regional level.

There is no single database of all cycle touring and mountain-biking routes and no way for visitors to consider which trail would suit them best, in a similar way to [www.wanderland.ch](http://www.wanderland.ch) (see Switzerland case study in section 1.3 below). While ATA is currently working on a database and website of cycling and walking trails, this should be reconsidered and developed in line with international best practice and in tandem with product development. The lack of information (both on-line and maps) was highlighted as a weakness by international travel trade executives.



There is no standardisation of approach to cycling trail signage or to trail surfacing/grading.

There are some high quality unofficial publications such as 'Cycling in the Algarve' by Huw Thomas from Pedal Portugal.

With regards to long distance mountain-biking routes the cycle route evaluation matrix, shown below in Figure 8, clearly indicates the comparative high overall standard of the option to cycle the Historical Way on the Rota Vicentina which only failed to achieve a full score as it is not promoted by Rota Vicentina Association due to the potential for recreational user conflict. There is great potential for the development of a cycle touring route along the Rota Vicentina corridor due to the associated marketing and management in place. There is also potential for the development of shorter touring cycle touring loops from some towns along the Rota Vicentina.

Twenty-seven road cycling routes<sup>1</sup> with four levels of difficulty have been identified by Federação Portuguesa de Ciclismo (FPC) in a recent report for Turismo do Algarve. These routes have been defined by area, with seven routes in Zona Este, six in Zona Central, six routes in Zona Oeste, and eight in Estágios Desportivos. Properly implemented and promoted these routes would significantly contribute to the road cycling product offer in the Algarve.



<sup>1</sup> <http://www.bikemap.net/en/user/cyclinportugal-algarve/>

Both the [Via Algarviana](#) and [Grande Rota do Guadiana routes](#) achieve satisfactory scores with the Grande Rota do Guadiana having the potential to benefit from improved marketing and information provision.

With regards to cycle touring the Ecovia do Litoral scores very low on all criteria except linkages with excellent transport and accommodation opportunities along the route. There is great potential to develop this trail further as part of the Eurovelo product offer. There is also potential to promote longer cycle routes in the rural areas of the Algarve.

There are [no official local touring cycle routes](#) although there is great potential to develop local 1-2 hour circuits from settlements such as Faro centre to Praia do Faro or from Sagres Fort to Cape St Vincent.

**Figure 8: Cycling Route Evaluation Matrix**

Criteria	Regional Routes				Local Routes
	Rota Vicentina (Historical Way)	Via Algarviana	Grande Rota do Guadiana	Ecovia do Litoral	
Condition	***	**	**	*	**
Directional Signage	***	**	**	*	*
Orientation/interpretative signage	***	**	**	*	*
Management	***	**	**	*	**
Maintenance	***	**	**	*	**
Website information	**	**	*	*	*
Maps and guides	**	**	*	*	*
Local linkages e.g. accommodation, transport	***	**	**	***	**
Marketing/Promotion	**	*	*	*	*
	<b>24</b>	<b>17</b>	<b>15</b>	<b>11</b>	<b>13</b>

Where \*\*\* = Excellent, \*\* = Satisfactory, \* = Poor

### 1.2.3 Hotel and Activity Providers

Most hotels are not very responsive to cycling market needs. Facilities and services are less developed than in competitor countries/regions - France, Italy and Spain, which are more established and have a longer track record in catering for cycling visitors.

While cycling and walking are mentioned in many of the websites as activities available in the Algarve, few establishments actively offer facilities and services specifically for walkers and cyclists. Those establishments that feature cycling packages rely on specialist providers (Megasport most often featured in this regard).

A very good exemplar of a Portuguese hotel catering for cyclists is Herdade do Touril [www.herdadedotouril.pt](http://www.herdadedotouril.pt) This establishment, based in Alentejo, not only has mountain bikes available for guest use (free of charge), but it also provides route maps, and signed looped trails around the hotel property. The hotel also has a dedicated bike storage space and bike cleaning service. These facility and service interventions have contributed to an extension in the guest 'length of stay' and increased repeat business.

A good example in the Algarve is Aldeia do Pedralva [www.aldeiadopedralva.com](http://www.aldeiadopedralva.com). The Hotel Memmo Baleeira [www.memmohotels.com](http://www.memmohotels.com) operates at the higher end of the market. They target the 'sports/active' segments by providing a range of facilities and services including yoga, massages etc. Hotels like the Tivoli Lagos permit bike storage but dedicated facilities for cyclists are not provided (i.e. bikes stored with golf bags).

BTTour and their associate brand Portugal Bike is a market leader for cycling tours in Portugal. Other established companies include A2Z Adventures, Teracotta Journeys and Blue Coast Bikes.

Walking Sagres, SAL and Ytravel are amongst the more established companies for walking.

A strength of the activity providers (and opportunity) is the ready access to tour guides. Many university graduates are unemployed and speak fluent English (and often other languages). They also have a culture of providing warm hospitality.

Activity providers provide a range of information on their websites, which, in most cases are of a good quality. Most companies use social media channels although the extent of such usage is not clear. Options for cyclists and walkers include guided and self-guided programmes, half day to week long holidays, and multi-activity programmes.

A lack of accommodation near walking trails is identified as a weakness by international tourism trade executives.



## MAP 2: Existing Walking and Cycle Routes



**KEY:**

- |  |                                         |  |                                                |  |                                                         |
|--|-----------------------------------------|--|------------------------------------------------|--|---------------------------------------------------------|
|  | Grande Rota do Guadiana (65km)          |  | Ecovia do Litoral (214km)                      |  | Via Algarviana (300km)                                  |
|  | Rota Vicentina Historical Way (231km)   |  | A Lagos (Ria Alvor) - Portimao (Rio Arade)     |  | A Link 1 Parises - São Brás de Alportel (18.4km)        |
|  | Rota Vicentina Fishermans Trail (120km) |  | B Faro (Pontes Marchil) - Bias do Sul (Olhao)  |  | B Link 2 Loule Train Station - Salir (28.2km)           |
|  | Rail Line                               |  | C Altura (Castro Marim) - Retur (Castro Marim) |  | C Link 3 Mexilhoeira Train Station - Monchique (25.4km) |
|  |                                         |  | Local Walks on Via Algarviana                  |  | D Link 4 Lagos Train Station - Bensafrim (10.1km)       |
|  |                                         |  |                                                |  | E Link 5 Marmeleira - Aljezur (18.6km)                  |



### 1.3 Best Practice Case Studies

TDI examined four international case studies of comparative trails and approaches. These included:

- Balearic Islands – Mallorca & Ibiza, Spain (walking, cycling and mountain-biking)
- Switzerland (walking, cycling and mountain-biking)
- Loire a Vélo, France (cycling)
- Great Western Greenway, Ireland (cycling and walking)

TDI also considered some elements of the Algarve's Rota Vicentina as a model of local best practice.

Overall there are a range of key findings from the best-practice case studies. These include:

- Provision of **high quality integrated information through websites, maps, apps, and guides** is essential. Successful communication at a national level e.g. Switzerland, regional level e.g. Loire a Vélo, or local level e.g. Great Western Greenway, all provide a range of high quality information on websites.
- Provision of **high quality standardised signage** gives users confidence in the quality of the trail. This is considered essential from the start in the provision of the SwissMobility trails. The Rota Vicentina network also provides high quality standardised signage.
- Cycling and walking infrastructure includes **integration with local public transport** networks to provide a seamless connection.
- **Cycling events** can help to raise the profile of a destination in overseas markets although they are unlikely to have a significant impact in themselves on overall visitor numbers and revenue.
- **Private sector businesses have engaged** with cycling and walking in successful activity destinations by providing facilities and services including bike storage or baggage transfer
- **Leadership and organisation are principal prerequisites** to the successful development of a collaborative regional development across multiple administrations and communities. Leaders cannot work in isolation; they need a supportive institutional framework with all levels of stakeholders being represented.
- A preparedness to **subjugate narrow territorial interests** for the greater benefit of the wider region is equally vital, though this may only be achieved through a **programme of information dissemination** using local media and personal involvement in meetings of the key stakeholders.



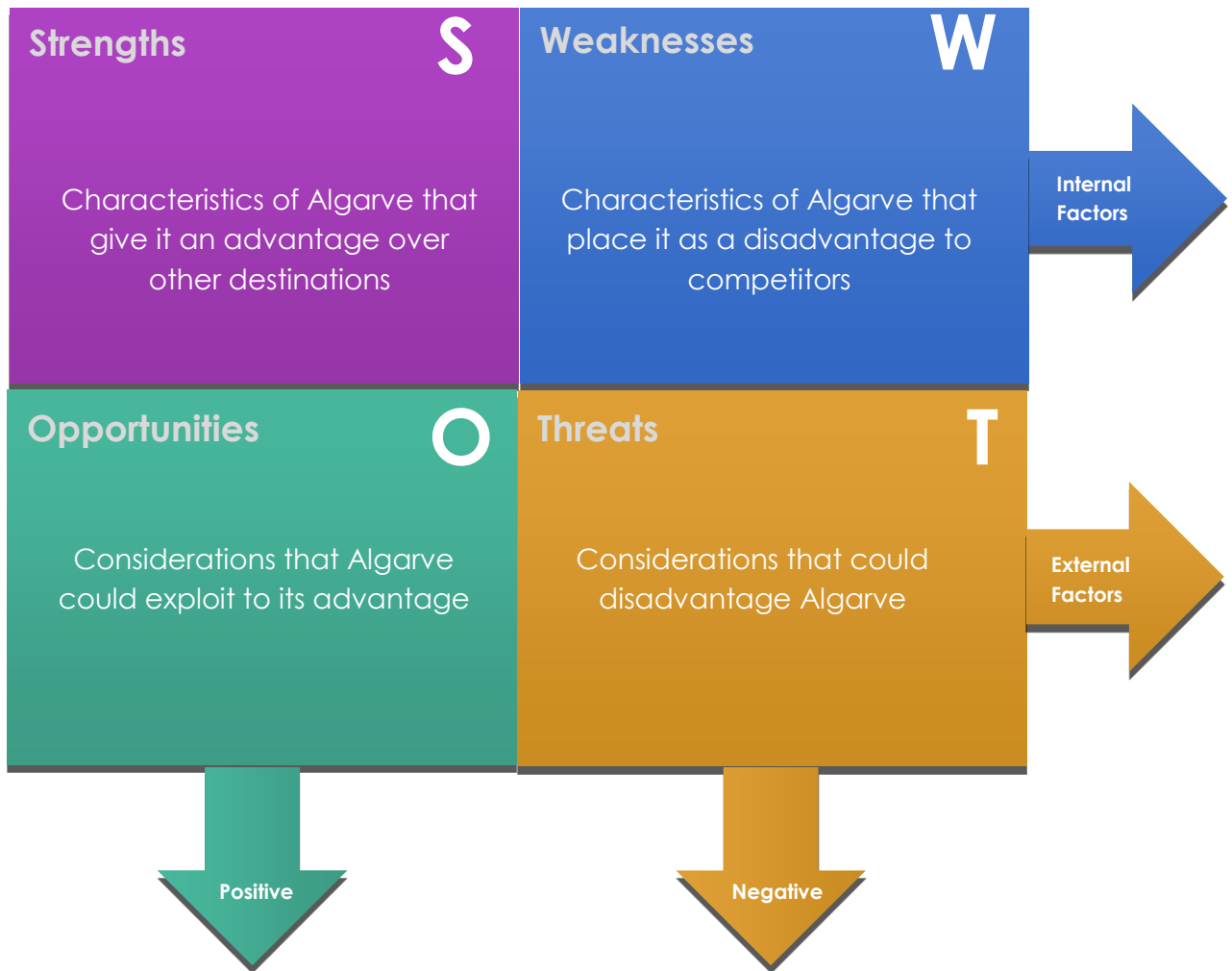


- **Success is a long term process** since the twin imperatives of building support from throughout the region and getting the product offer right (including directional signage, road and other forms of access including appropriate vehicle parking, trail development and maintenance, interpretative signage, accommodation) should all precede any extensive and intensive market launch and promotional activities.
- **Partnerships and alliances are important** both to garner wide support for the project and also as active partners in components of the project that are not directly related to tourism and recreation but that facilitate sustainable use of natural features and cultural heritage sites. Membership schemes (such as Rota Vicentina Association) represent effective ways to reinforce support and contribute to the finance of the organisation responsible for overseeing the development and marketing of the area.
- **Funding for trail development for all international case studies came from the public sector** – local & regional for Loire a Vélo, regional and national tourism authority for the Great Western Greenway, regional for Mallorca, and from regional and local government in tandem with national organisations in the case of Switzerland. The availability of funding will determine to a major extent what can be done and, in all likelihood, limit the ambition of projects in the short term. However, well designed and executed small project components as part of a strategic and coherent plan that is fully supported across the region can act as a powerful persuader for funding agencies to support the project, and demonstrate the mutual benefit of working with the project to key stakeholders e.g. municipal councils, hotels and others in the private sector.



## 1.4 SWOT Analysis

The market analysis and product assessment findings have been drawn together in a SWOT analysis which is presented below. TDI's strategy (as presented in Part 2) aims to capitalise on the Algarve's competitive advantages and achieve differentiation as a cycling and walking destination.



### 1.4.1 Strengths

The strengths below describe the positive attributes of the Algarve as a cycling and walking destination.

## Strengths

S

Characteristics of Algarve that give it an advantage over other destinations

- **Climate** – 300+ days of sunshine;
- **Location** – Proximity to major population centres of Europe;
- **Access** – Good international access with Faro Airport;
- **Environment** – Outstanding beauty and variety;
- **Food** – Excellent variety including seafood;
- **Rota Vicentina** – World class walking route with opportunity to extend route to Lagos;
- **Via Algarviana** – World class walking route with opportunity to drive rural economy, to develop linkages to Ecovia and to develop further looped walking trails;
- **Grand Rota do Guadiana** – New 65km walking and mountain-biking route with opportunity to develop associated cycling and kayak route and to link to Alentejo;
- **Walking Product** – Wide variety of long distance walks, looped and short walks;
- **Cycling Product** – Ecovia do Litoral (Potential to become world class cycling route); opportunity to develop range of road cycling routes based on recent report by Federação Portuguesa de Ciclismo (FPC);
- **History and Culture** – Rich culture and historic built heritage;
- **Road Network** – Good quality inland roads with little traffic;
- **Events** – Volta do Algarve and Cachapo Alive are internationally recognised events;
- **Commitment** – Strong village and town communities involved in trail maintenance.

#### Objective:

Capitalise on these strengths which bring added value and in some cases a competitive advantage to the Algarve as a cycling and walking destination.

### 1.4.2 Weaknesses

The weaknesses below detract from Algarve's appeal as a cycling and walking destination.

## Weaknesses

## W

Characteristics of Algarve that place it as a disadvantage to competitors

- **Trail Quality** – Many trails but most lack signage and some basic maintenance;
- **Visitor Safety** – Dangerous infrastructure could lead to injuries or fatalities;
- **Marketing** – Inadequate and ineffective marketing of cycling and walking;
- **High on-road proportion** on some long distance trails contributing to negative/dangerous experience;
- **Access** – Lack of direct flights outside peak season;
- **Road signage** – Poor quality generally;
- **Accommodation and Restaurants in Rural Areas** – Limited;
- **Bike Shops** – Many not responding to market demand;
- **Transport Linkages** – Poor linkages in some areas. Lack of coordinated connection between Faro Airport and train station;
- **Websites and Maps** – Lack of single point of information for cycling and walking;
- **Opening Times** – Many (public and private) facilities closed outside peak season;
- **Standardisation** – Lack of common trail standards;
- **Organisation** - Lack of cohesion, coordination and leadership; establish public/private governance model to coordinate product development and marketing and facilitate greater collaboration;
- **Trail Management** – There is a need to identify appropriate management and maintenance models for some routes;
- **Code of Conduct** – Lack of standard guidelines for walkers and cyclists;
- **Data** – Lack of research and monitoring;
- **Festivals and Events** – Limited range and coordination of events focussed on off peak season;
- **Reputational Damage** – Continued poor quality trails and infrastructure will impact negatively on visitor experience;
- **User Conflict** – Potential user conflict between cyclists and walkers;
- **Planning** – Inadequate coordination of planning;
- **Community Support** – Failure to deliver and spread economic benefits.

### Objective:

Prioritise improvements to Algarve's cycling and walking offer in order to compete and win market share from other destinations.

### 1.4.3 Opportunities

The opportunities below reflect the Algarve's potential as a cycling and walking destination.

## Opportunities



Considerations that Algarve could exploit to its advantage

- Growth in market demand for cycling and walking holidays;
- Greater awareness of the health benefits of activities requiring physical exercise;
- Eurovelo – Phased development of Ecovia do Litoral as world-class greenway for cycling and walking and integration with Eurovelo routes;
- Develop new walking routes – Develop new coastal walks and urban trails to widen the product offer. Focus development on hubs;
- Ryanair – Major fleet expansion plans;
- Increase the frequency and number of direct flights;
- Broaden and deepen market awareness of the Algarve as a cycling and walking destination;
- International specialist operator interest in Algarve/B2B;
- Age and economic circumstances of key target markets (favourable);
- Capture market share from competing destinations, particularly North Africa due to political instability.

#### Objective:

To realise the potential of the Algarve as a leading cycling and walking destination through effective implementation of targeted marketing strategies.

#### 1.4.4 Threats

The threats below have the potential to threaten the development of Algarve as a cycling and walking destination.

#### Threats

T

Considerations that could disadvantage Algarve

- **Access** – Potential over-dependence on single carrier;
- **Competitors** - Investment in cycling and walking product development and marketing;
- **Global economy** – Potential negative impacts arising from downturn in China economy; exchange rate fluctuations;
- **Political** – EU Brexit and possible changes to Schengen arising from refugee crisis;
- **Failure to maintain cycling routes and walking trails** to international standards required by tourists;
- **Failure to make the marketing investment** necessary to establish the Algarve's reputation as a premier location for cycling and walking activities.

#### Objective:

Through effective planning and co-ordination, position the Algarve to respond proactively to factors that may threaten the destination.



## 1.5 Stakeholder Map

For the purposes of this study a stakeholder mapping exercise was undertaken (see Figure 9).

Figure 9: Stakeholder Map



Blue = Primary Stakeholders; Green = Secondary Stakeholders

This focuses on primary and secondary stakeholders where primary stakeholders are those who without their continued participation the initiative to increase the number of cycling and walking visitors and extending the season for these visitors cannot succeed. Secondary stakeholders are those who influence, affect or are influenced by or affected by the initiative and while play an important role are not essential for its success. Primary and secondary stakeholders can also be considered as public and private entities. For the Algarve, and in relation to cycling and walking development, the **primary stakeholders include:**

**Destination Management Organisations** (mainly public with the private association ATA also playing a lead role):

- Turismo do Portugal
- Turismo do Algarve
- ATA

### Municipal Councils (public)

- Alcoutim Municipal Council
- Castro Marim Municipal Council
- Vila Real de Santo António Municipal Council
- Tavira Municipal Council
- Olhão Municipal Council
- Faro Municipal Council
- Loulé Municipal Councils
- Albufeira Municipal Council
- Silves Municipal Council
- Lagoa Municipal Council
- Portimao Municipal Council
- Lagos Municipal Council
- Vila do Bispo Municipal Councils
- Monchique Municipal Council
- Sao Bras de Alportel Municipal Council
- Aljezur Municipal Council
- Mértola Municipal Council, Alentejo
- Odemira Municipal Council, Alentejo
- Sines Municipal Council, Alentejo
- Santiago do Cacém Municipal Council, Alentejo
- Serpa Municipal Council, Alentejo
- Beja Municipal Council, Alentejo



### Trail Managers (public/private)

- Rota Vicentina Association
- Almargem
- Odiana Association
- In Loco Association

### Tour Operators (private)

- Tour operators – local
- Tour operators – overseas

### Activity Providers (private)

- Activity companies

### Air Transport (private)

- Airlines
- ANA

### Accommodation Providers (private)

- Hotel and resort owners

**Secondary stakeholders include:**

**Regional Organisations (public)**

- CCDR
- AMAL

**Government Agencies (public)**

- Direcção Regional da Cultura
- Autoridade Marítima Nacional
- ICNF

**Host Community (public)**

- Local Community
- Ex-pat community

**Visitors (public)**

- Visitors – domestic
- Visitors – Overseas

**National Recreation Organisations (public/private)**

- Federação Portuguesa de Ciclismo (FPC)
- Federação Portuguesa de Cicloturismo e Utilizadores de Bicicleta (FPCUB)

**Infrastructure Providers**

- Infraestruturas de Portugal
- Comboios de Portugal – CP (Caminhos de Ferro Portugueses)

**Local Transport (private)**

- EVA
- Car hire (ARA/ARAC)

**Trade Associations (private)**

- Associação dos Hotéis e Empreendimentos Turísticos do Algarve - AHETA
- Associação dos Industriais Hoteleiros e Similares do Algarve - AISHA

**Media (private)**

- Journalists



All destination stakeholder relationships are interlinked and must work together. Coordination and collaboration and communication are vital to deliver the common goal of more visitors over a longer period of the year which will deliver benefits to all local stakeholders and enhance visitor experience.

Monitoring of the implementation of the initiative and the roles of key stakeholders is essential to guarantee progress towards creating a high quality overall experience. A control process focussed on the monitoring of progress at key stages is considered vital to the success of the initiative. Feedback can inform future stages of implementation and highlight where best practice can be shared or where key stakeholders are holding up progress.

The success of the initiative is likely to depend on strong destination stakeholder unity. To maximise the opportunity for stakeholder unity it is likely that a formal structure for contact and communication will be required in tandem with an identified leadership role to drive the implementation of the action plan.



## 2. Vision and Development Strategy

### 2.1 Project Objective

**Overall Objective** – To diversify the Algarve Tourism Product that is currently over dependent on sun and sea, with a view to easing the high seasonality factor. There is a lack of product offer - things to see and do - outside the peak summer season.

**End Goal** – To contribute to *increasing the number of tourists* attracted to the region by a *new range of differentiated products* in the off peak season.

### 2.2 Proposition and Vision

#### 2.2.1 The Proposition

To achieve maximum, sustained market impact, the marketing and promotional strategy and activities to broaden the Algarve's destination brand to encompass activity pursuits as well as summer, sea and sun holidays and golf will need to be closely coordinated with these other components of the Algarve's tourism product and experience offer.

The marketing for cycling, walking and other activities will not replace the existing marketing strategic approach and campaigns for the Algarve but support and strengthen them. Close coordination will be vital to ensure this objective is met.

It is essential that the proposition for the cycling and walking product sectors:

- is **consistent and compatible** with the overall branding of the Algarve, as well as activity tourism for Portugal as a whole;
- is **representative of the truth** of the study area's distinctive characteristics and attributes;
- **maximises the advantages** that the natural and cultural resources and heritage of the Algarve hold over competing areas;
- is **coordinated** through the full range of public and private stakeholders to ensure that the overall marketing strategy and activities for cycling and walking complement, and are compatible with, those of the municipalities and other local groups.



The proposition for the Algarve's cycling and walking strategy is:

***'Getting out and about whether on two wheels or on foot makes it easy to enjoy the outdoor recreational activities, stories, music and food, whether in the mountains, along the rivers, on the coast, or in the small towns and villages. You don't just visit the Algarve on a cycling or walking trip, you experience it in every way.'***

### 2.2.2 The Vision

The vision for a tourism destination should act as an inspiration for 1. Local stakeholders, 2. The prospective visitor, and 3. The international travel trade intermediaries.

In the Algarve's case as an established tourism destination, the vision is about changing the perspective held of the region by the local business community (and Algarve society as a whole) and in the marketplace. The vision must, therefore, incorporate the concept of a new approach to tourism in the Algarve.

Taking the foregoing into account, TDI proposes the following vision statement to guide the strategic development of the cycling and walking tourism product and service offer in the Algarve:

***'The Algarve will be a destination offering a range of tourism experiences throughout the year attracting a wide range of market segments from all European markets and further afield. This will be achieved through its establishment as a leading destination for cycling and walking complementing its summer sun and sea and golf tourism to make the Algarve a year round destination based on the brand of 'Experience a Different Algarve – Explore the Outdoors!'***



## 2.3 Strategic Objectives

In developing the strategic principles to be followed for the future development and support of adventure and outdoor activity tourism in the Algarve, TDI proposes a set of key requirements that the sector should meet in order to be competitive, efficient and sustainable. The imperatives for the Algarve cycling and walking tourism sector are that it should:

1. **Increase the number of visitors attracted to the Algarve and reduce the impact of seasonality** by providing and promoting a range of cycling and walking opportunities in the shoulder and off-peak seasons, thereby increasing and spreading the tourism economy across the year;
2. **Generate substantial socio-economic benefits** through the development of a range of experiences throughout the Algarve, which provide varied and stimulating experiences for cyclists and walkers;
3. **Marry the needs and potential of all parts of the Algarve**, through collaboration and coordination between the different municipalities and private sector operators in a spirit of *co-opetition* (cooperation while in competition);
4. **Maximise the level and spread of benefits to parts of the Algarve** through the full development and operation of a diverse and authentic set of cycling and walking visitor experiences readily accessible and well-presented by trained guides and other personnel;
5. **Exploit the opportunities through market: product matching** related to the type of activity, profile of the passenger mix (by nationality and interest) and theme (if any);
6. **Adopt an integrated development and marketing approach** based on complementary product offerings and market targeting in order to maximise the demand from international, domestic and local markets.

The development, promotion and management of the Algarve as an adventure destination, including cycling and walking, will aim to:

- **Provide opportunities to diversify the Algarve tourism product** that is currently over-dependent on the summer months sun and sea holiday segment;
- **Establish the appropriate organisation and management structure, roles and responsibilities of an umbrella organisation** to oversee the development and management of the Algarve's adventure activity sectors;
- **Create extensive awareness of, interest in, and sales for the Algarve's cycling and walking product offer** through substantive, targeted and dedicated marketing and promotional campaigns differentiated by market and segment,
- **Enhance the existing cycling and walking product offer in the Algarve**, thereby raising its profile as a premier outdoor activity destination;

- Provide a range of improved recreational opportunities for overseas and domestic visitors and local residents;
- Work with the airlines to increase the number of flights scheduled for Faro during the months outside the summer season;
- Generate local economic benefit, contributing to sustainable urban and rural regeneration;
- Conserve, enhance and interpret the natural, built and cultural environment of the area;
- Facilitate understanding, appreciation and protection of the Algarve's natural environment.

## 2.4 Recommended Strategies

The seven strands of the proposed strategy for the development of the cycling and walking tourism products and services in the Algarve are:

1. Organisation and Management
2. Product Development – Cycling
3. Product Development – Walking
4. Product Enablers and Quality Management
5. Accommodation Diversification and Development
6. Access
7. Sales Development and Marketing Communications

For each of the strategic areas, a set of actions is detailed along with the rationale and justification for each of them.



### 2.4.1 Organisation and Management

TDI proposes the following strategic interventions for the organisation and management of cycling and walking in the Algarve:

Create Strategic  
Leadership

Trail  
Management

Stakeholder  
Coordination

#### CREATE STRATEGIC LEADERSHIP

##### Strategy:

Create a strategic leadership mechanism to coordinate the development of adventure tourism in the Algarve; to set the strategic direction and to ensure this is sufficiently well funded to manage, promote and develop the adventure tourism product in the Algarve (including cycling and walking).

##### Recommendation:

Establish Algarve Adventure Tourism Development Association (AATDA), with decision making informed by an external Advisory Committee; recruit a dynamic figurehead personality; review the marketing budget focus of ATA.

#### Action Rationale

- Prepare (or commission) a business organisation plan to guide the establishment of a new umbrella organisation, the Algarve Adventure Tourism Development Association (AATDA) (action 01.01). The outcome of this exercise will be guidance regarding the preferred management model including structure, management and staffing, roles and responsibilities, and functions of AATDA. This will include how AATDA will interact with existing trail management organisations such as Rota Vicentina Association with a view to avoiding duplication of functions and identifying opportunities for increased efficiencies and exploiting economies of scale.
- Establish AATDA (action 01.02). Implementation of this action plan will be coordinated by Turismo do Algarve in close collaboration with AATDA and ATA. AATDA will initially be composed of Turismo do Algarve and AMAL. AATDA will be focussed on the implementation of the action plan and will be responsible for managing trails (including ensuring their quality and usability in conjunction with municipalities) as well as the implementation of follow up actions that may be included in the action plan related to product development. AATDA will commission trail standards and approve trails - walking, cycling, greenway, and blueways with official certification from one of the national organisations.

- **Promotion and sales will be the responsibility of ATA**, who shall be responsible for the definition and implementation of the Promotion and Sales Plan for the cycling and walking segments as well as the creation and management of a single website for cycling and walking, with information targeted to different audiences. This "hub" site will be informative (in Phase 1), and evolve into a transactional platform (bookings).
- **Establish AATDA Monitoring Technical Committee (action 01.03)**. This will be composed of TP, ANA, Turismo do Algarve, ATA, AATDA who will be responsible for monitoring the progress of work, through periodic meetings and will collaborate among other topics on identifying credit lines, partnerships for project development, and helping to increase traffic to the new site and links to other sites. One of the first tasks for the AATDA Monitoring Technical Committee will be to confirm priority actions for 2016 (action 01.04).
- **Recruit a dynamic figurehead personality (action 01.05)**. This person would be extensively experienced in activity tourism and widely respected both within the Algarve and in international markets to act as the figurehead for development and marketing initiatives in support of cycling and walking tourism.
- **Establish an AATDA Advisory Committee (action 01.06)**. This public private bottom up model will inform the decision-making of the AATDA. This would be formed from representatives of Turismo do Algarve, AMAL, ICNF, activity companies, tour operators, the accommodation sector (e.g. AHETA), NGO's such as ATA, Rota Vicentina Association, Odiana Association, Almargem, and In Loco. This would meet every four months to discuss regional projects, actions and strategic direction. This would also be linked to an annual Algarve Adventure Tourism Conference which would showcase national and international best practice (see action 28.03). This committee would be inspired by international best-practice such as the Switzerland Mobility Foundation and local and regional best practice such as the Faro Tourism Advisory Committee and Aldeias do Xisto in central Portugal ([www.aldeiasdoxisto.pt/directory](http://www.aldeiasdoxisto.pt/directory)).
- **Review marketing budgets (action 01.07)**. This will reconsider the current budget focus of TP, Turismo do Algarve and ATA with a view to increasing the emphasis on adventure tourism, particularly walking and cycling, with increased multi annual ring-fenced budget for this sector through increased funding or redirection of funding. This will enable the promotion of projects of sufficient scale to compete at an international level.

## TRAIL MANAGEMENT

### Strategy:

Enable long term sustainable product development through the identification of mechanisms for management of the key regional trails to ensure provision of trails and infrastructure of international comparable standard.

### Recommendation:

Sustainable long term funding sources are identified by AATDA for key regional routes including Ecovia do Algarve, Via Algarviana, Grande Rota do Guadiana and for the Rota Vicentina corridor.

### Action Rationale

- Identify funding sources for capital and operating finance for Ecovia do Algarve (action 02.01). Capital funding will be required for trail development and associated infrastructure, operating funding for trail maintenance, signage and development. It is envisaged that in the short term, capital finance will be sourced primarily from the public sector with an increasing proportion of finance for operating funding sourced from the private sector. Private sector organisations have indicated they would contribute funding if they knew there was a strategic development plan in place for the Ecovia. Further sources for funding include relevant municipal councils, private sector sponsorship and European funding.
- Review maintenance model of Ecovia do Algarve annually and recommend maintenance to be tendered under collaborative public-private partnership model unless minimum maintenance standards are reached (action 02.02). This is to ensure consistency of quality throughout the trail.
- Identify funding sources for Via Algarviana (action 02.03). This recognises a sustainable management model is needed for the long term support and development of the Via Algarviana which in turn has the potential to support rural livelihoods within the inland communities of the Algarve. This action builds on the recent study that has been undertaken by Almargem in relation to a management model. Given that funding from Municipal Councils (€19,195 for a 6 month period, or €1,745 from each municipality) ends in February 2016, then the establishment of a sustainable funding model should be given urgent attention. It is envisaged ongoing operating finance, for trail maintenance, signage and development, would be majority funded by municipal councils for a 5-year period, with an increasing proportion of financing sourced from the private sector during and after that period.

- Identify funding sources to maintain and manage the Grande Rota do Guadiana (action 02.04). This recognises the excellent work that has been carried out by Odiana Association, and the need to ensure that sustainable funding mechanism is in place.
- Identify and secure multi-annual funding to maintain the Rota Vicentina (action 02.05). While an increasing proportion of the funding for the Rota Vicentina is being provided by the private sector, the ring-fencing of a multi-annual budget for Rota Vicentina Association would contribute to financial certainty and enable long term planning. It is envisaged AATDA would work in partnership with Rota Vicentina Association and the relevant municipal councils to secure such a plan.



## STAKEHOLDER COORDINATION

### Strategy:

Promote, encourage and reinforce stakeholder coordination and buy-in

### Recommendation:

Promote, encourage and reinforce stakeholder coordination and buy-in including informing and engaging with mayors of municipal councils and asking them to discuss trail development on private land with landowners; collaboration with European Cycling Federation; and volunteer plans for long distance trails.

### Action Rationale

- Issue a bi-annual progress newsletter to relevant Mayors (action 03.01). This aims to retain and build momentum for the overall project through raising awareness of advantages and providing updates on progress and successes including visitor data. This is part of a campaign to convince key decision makers of value and potential of cycling and walking. It is envisaged this would be the role of the director of the AATDA.
- Sign annual associative contracts between AATDA and Mayors of relevant municipal councils (action 03.02). This event at a public ceremony with journalists attending aims to replicate a similar initiative by Rota Vicentina Association. This event reinforces the partnership between public and private entities and can become a positive public relations exercise for municipal councils.
- Persuade Mayors of municipal councils to engage with landowners to increase the proportion of off-road route for the Ecovia do Algarve (actions 03.03). This aims to capitalise on changing attitudes and to use mechanisms that have been successful in other countries such as Permissive Access Agreements in Ireland.





This may not have 100% success but is considered essential to improving the quality of the product in the Algarve. For the Ecovia do Algarve a first phase would be to engage with the 17 landowners between Olhão and Faro. [Action 03.04](#) to negotiate with Caminhos de Ferro Portugueses for development of new greenway bridge between Lagoa and Portimao is considered an essential component of the Ecovia do Algarve infrastructure to enable re-routing to avoid the N125 dual carriageway.

- [Collaborate with the European Cycling Federation in relation to the re-routing of the Eurovelo 1 route \(action 03.05\)](#). This reinforces the established strategic direction for this route. This re-routing will provide the strategic framework for the development of a coastal cycle route along the west coast of Portugal, of which the Ecovia do Algarve would be a core component.
- [Produce Volunteer Management Plans for the Via Algarviana and the Grande Rota do Guadiana \(action 03.06\)](#). This is considered an essential element of the sustainability of trail maintenance. Many people wish to engage with the natural environment and while they have the time to do so, many do not have the skills and may require training. Economies of scale can reduce the cost of provision of such training. Rota Vicentina already has a successful volunteer programme and networking could help establish similar such volunteer networks.





## 2.4.2 Product Development – Cycling

TDI proposes the following strategic interventions for the development of the cycling product in the Algarve:



### ECOVIA FLAGSHIP ATTRACTION

#### Strategy:

Create a world-class flagship attraction based around the Ecovia concept which provides a significant opportunity to increase visitor numbers to the Algarve and to reduce seasonality through the development of a flagship attraction.

#### Recommendation:

Relaunch a world-class Algarve greenway as the Ecovia do Algarve (The Algarve Greenway) through phased development to an agreed standard as a flagship attraction as part of the Eurovelo network.

### Action Rationale

- Relaunch the Ecovia do Litoral cycle route as 'Ecovia do Algarve' (see action 26.08). The intention of this rebranding is to improve international recognition; create a focus for the launch of a phase 1 of the route; and for the phased development of subsequent sections with the long term aim of a 450km loop route around the Algarve. The purpose of renaming the route from Ecovia do Litoral is to use a name appropriate for the scale of the proposed route; and to rename a brand which has lost its appeal for many due to insufficient investment in the original concept.
- Upgrade phase 1 of Ecovia do Algarve to market ready condition (action 04.01). This action would require minimal intervention from the Spanish border at Vila Real de Santo Antonio to Bias do Sul to the east of Olhão. The current blue line road marking is replaced with standardised signage which will be used throughout the Ecovia do Algarve.

This section of the existing Ecovia do Litoral is currently in the best condition with only a 1.5km section to the east of Altura requiring re-routing to avoid the N125 along which the route currently runs. This 70k section could be completed in one day or two days with an overnight in Tavira (see map 3 for detail).

- [Progressively develop market-ready sections of the Ecovia do Algarve \(action 04.02\)](#). Sections to be developed as part of a wider strategic plan to extend the Ecovia route in the medium term along the south coast to Cape St Vincent, north to along the Guadiana River to Alcoutim and north from Cape St Vincent to Odeceixe. The intention is for Municipal Councils responsible for identified sections to develop proposals for funding for the development of their section of the Ecovia do Algarve, on a phased basis, working in collaboration with neighbouring Municipal Councils, in accordance with criteria issued by AATDA Monitoring Technical Committee relating to maintenance, trail standards, funding, and private sector involvement.



As well as an extension of the Ecovia network this project aims to establish the Rota Vicentina as an international cycling destination of interest to groups and individuals. This project would be responding to existing visitor demand for such trails in the area and provide a complementary activity network as part of the Rota Vicentina corridor offer. The priority would be the development of a high standard cycle touring route, off road where possible, on a phased basis. This cycle route, along the Rota Vicentina coast would be managed by AATDA rather than the Rota Vicentina Association. The section from Vila Real de Santo António to Alcoutim would also be part of the Guadiana corridor product offer and be extended to Mertola in Alentejo (see map 3 for indicative detail).

- [Investigate opportunity to link Ecovia do Algarve from Alcoutim to Odeceixe \(action 04.03\)](#). This would be a long term initiative to identify the optimum route to complete a 450km circular loop around the Algarve for the Ecovia do Algarve (see map 3 for indicative detail) – this would take the form of an on-road cycle route and would be a separate type of trail to the Via Algarviana which is mostly off-road walking route.

- Investigate opportunity to develop Eurovelo 1 from Cape St Vincent to Lisbon and beyond (action 04.04). This will have the long term goal of attracting more cyclists to Portugal and to the Algarve. This initiative is closely linked to the provision of the Eurovelo route 1: Atlantic Coast Route, and Eurovelo 8: The Mediterranean Route – linking into a European wide network. This project has the opportunity to be considered to be a national scale project with a cycle route along the coast of Portugal from Vila Real de Santo Antonio to Cape St Vincent being part of the Eurovelo 8 route; and the section from Cape St Vincent north via Lisbon to the Spanish border part of the Eurovelo 1 route.

In the short term, the route of the Eurovelo 1 would run from Salamanca to Cape St Vincent; and the EV8 from Huelva to the Cape. In the long term, 2019+, this would be reformulated with the agreement of the European Cycling Federation so that the EV1 would run down the west coast of Portugal to the Cape; and the EV8 would remain on the south coast.

- 2016-2019 - Ecovia do Algarve to be upgraded/developed as part of Eurovelo #8 Mediterranean Route from Cyprus to Cape St Vincent via Huelva and as part of Eurovelo #1 Atlantic Coast Route from Norway to Cape St Vincent via Salamanca
- 2017-2019+ - Phased development of the Ecovia route from Cape St Vincent up the west coast of Portugal and on through Lisbon. Route to be identified by end November 2015 by Portuguese Cycling Federation.
- 2019+ - Eurovelo #1 route is changed to run down the west coast of Portugal, ending at Cape St Vincent and Eurovelo #8 route is extended from Cape St Vincent to Cadiz



## LOOPED LOCAL CYCLING ROUTES AND GREENWAYS

### Strategy:

Increase visitor dwell time and local revenue from cycling and walking tourism through shorter looped local cycling routes and greenways focussed on accommodation centres along the regional linear routes.

### Recommendation:

Connect Faro city centre to Praia do Faro via the eastern perimeter of Faro Airport which also links Faro Airport to the Ecovia do Algarve; develop looped cycle routes along the Rota Vicentina at overnight stops on the route; and develop a greenway between Sagres Fort and Cape St Vincent.

### Action Rationale

- Construct Greenway between Faro town centre (harbour) and Praia de Faro via the Parque Ribeirinho de Faro and the eastern perimeter of Faro Airport including upgrade of bridge to include cycle lanes (action 05.01). There is an opportunity to provide a greenway linking the centre of Faro with the new Parque Ribeirinho de Faro, which received a significant investment from Turismo de Portugal, along the south side of the railway on public road. The optimum route from here would be on a boardwalk crossing the Ria Formosa Natural Park to the perimeter of Faro Airport. If this opportunity cannot be realised, the optimum link would be via Montenegro residential area. From here the greenway would run around the eastern and southern perimeter fence of Faro Airport and run south to Praia do Faro.

This would provide Faro with a beach connection via a 20-25 minute cycle ride. This route would also provide an opportunity for visitors to Faro to experience the wetlands on the doorstep of Faro, with opportunities for interpretation associated with the natural environment and cultural activities such as salt production. This action will also link the Ecovia do Algarve route to Faro Airport and Faro centre with Faro Airport increasing connectivity and, in conjunction with action 07.02 regarding the provision of bike hire concession at Faro Airport will enable visitors to arrive at Faro Airport, hire a bike and cycle onto the Ecovia do Algarve.

- Develop short looped cycle routes along the route of Rota Vicentina (action 05.02). This aims to provide additional activities to retain visitors for longer in overnight destinations.

- Develop off-road and/or segregated Greenway between Sagres Fort and Cape St Vincent lighthouse (action 05.03). This relates to the opportunity between two visitor attractions in the south west of the Algarve – Sagres Fort and the lighthouse at Cape St Vincent. Currently the road connecting these two attractions, which lies within the protected area, is not an attractive environment for walkers and cyclists. The provision of a 6.7km off-road greenway connecting the two would enable safe transit and would provide an attraction by itself, creating opportunities for bike hire enterprise. This would also form a key part of the Ecovia do Algarve and Rota Vicentina routes. There is also an opportunity to bundle these two attractions together through joint ticketing.
- Support the development of a network of road-cycling routes within the Algarve as proposed by Federação Portuguesa de Ciclismo (FPC) in a recent report for Turismo do Algarve (action 05.04). This will provide a focus for the promotion of road-cycling in the Algarve and help to establish the reputation of the region as a road-cycling destination.

## MOUNTAIN BIKING

### Strategy:

Capitalise on the growth in demand for mountain-biking opportunities and the topography of the Algarve by providing facilities and improved access for mountain-bikers.

### Recommendation:

Upgrade existing and provide new facilities mountain-biking facilities, including a regional mountain-biking centre in the Algarve. This in tandem with improved availability of information regarding the mountain biking trails will enhance recreational opportunity and increase participation.

## Action Rationale

- Extend the scale of the Grande Rota do Guadiana along the length of the Guadiana River and to link the Algarve and Alentejo regions (action 06.01). This will create a significantly larger trail. Odiana Association already have an agreement in principle in place regarding this. The route would then link to the Camino de Santiago and link to an area with different identity, environment, and cultural heritage. This would provide an enhanced mountain-biking product offer.
- Upgrade the surfacing on the Via Algarviana between Alcoutim and Monchique in phased sections (action 06.02). This will enable greater numbers of visitors to participate in mountain-biking on the Via Algarviana by reducing the skill level required to complete sections of the route between Alcoutim and Monchique. This will encourage greater number of visitors to the area and help to position the Algarve as a mountain-biking destination.

- Support the development of an Algarve regional mountain-biking centre (action 06.03). The location of this centre is part of a current study. This will provide a focus for mountain-biking events in the Algarve and help to establish the reputation of the region as a mountain-biking destination.

## SUPPORTING MEASURES – CYCLING

### Strategy:

Enhance the cycling product offer and complementary products to help to increase visitor dwell time and associated revenue, and to lift the reputation of the Algarve as a cycling destination.

### Recommendation:

Provide storage facilities and bike hire at Faro Airport, provide electric bike hire opportunities, and develop blueways along the Guadiana River and Ria Formosa Natural Park.

## Action Rationale

- Provide storage facilities for bikes (action 07.01) and bike hire (action 07.02) at Faro Airport. This linked with the provision of a link between Faro Airport and train station provides additional facilities for cyclists with positive impacts on visitor's perception of the Algarve as a cycling destination.
- Investigate opportunities for provision of public electric bike hire (action 07.03). This relates to the provision of bike hire by Municipal Councils to encourage public use of bikes for short cycles while on holiday. This is particularly an opportunity for those councils located along the south coast and in urban areas. It is recommended that these be electric bikes as the provision of regular bikes for hire by the public sector may displace private sector enterprise opportunities.
- Develop Blueways for kayaking along the Rio Guadiana and within the Ria Formosa (action 07.04). This initiative provides a complementary activity to cycling and walking and helps to establish these areas as adventure destinations. This builds on similar initiatives in Ireland to develop water-based routes. The Rio Guadiana offers an attractive river valley with accommodation along the route. The Blueway would, for example, enable visitors to complete the Grande Rota do Guadiana from south to north by walking or cycling and from north to south by kayak, either independently or as part of a tour.



### MAP 3: Proposed Cycling Routes



**KEY:**

- Grande Rota do Guadiana (MTB)
- Via Algarviana (MTB)
- Rail Line
- Ecovia do Algarve
- Indicative extension of the Ecovia do Algarve
- Phase 1 - Ecovia do Algarve

### 2.4.3 Product Development – Walking



#### ECOVIA DO ALGARVE

##### Strategy:

Maximise the opportunity presented by and optimise the investment in the Ecovia cycle route by developing it as a Greenway for use by both cyclists and walkers.

##### Recommendation:

Develop and promote the Ecovia do Algarve as a regional walking route along the south coast as well as a cycle route.

#### Action Rationale

- **Enable use of the Ecovia do Algarve route by pedestrians (action 08.01).** By identifying sections of Ecovia do Algarve route between Vila Real de Santo António and Cape St Vincent where intervention is required to enable shared use by pedestrians and cyclists e.g. indication of shared surface at pinch points through paint marking and signage, this will enable safe use by pedestrians. With the Great Western Greenway in Ireland being used by 75% cyclist and 25% walkers there is a significant opportunity for attracting walkers to this route.

The principal focus of promotion, given the routes covered by the Grande Rota do Guadiana and Rota Vicentina would be between Vila Real de Santo António and Cape St Vincent, a multi-day walking trail with abundant accommodation and variety of landscapes including the Rio Formosa Natural Park and the cliff top scenery to the west. The use of quiet roads and off-road networks means the proposed Ecovia do Algarve offers an opportunity to offer a 214km walking route along the south coast, completing the cycle route (see map 4 for indicative detail). See also action 26.10 regarding promotion of the route.

## ENHANCE ROTA VICENTINA, VIA ALGARVIANA, ROTA DO GUADIANA

### Strategy:

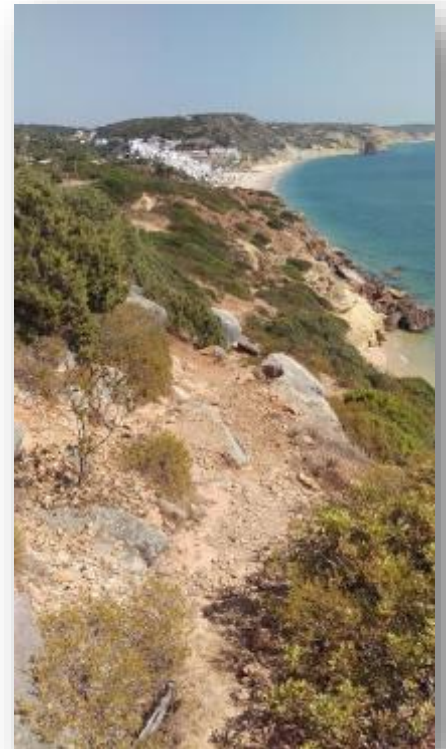
Enhance the existing recreational opportunity provided by the Rota Vicentina, Via Algarviana and Grande Rota do Guadiana regional routes; and the appeal of these routes to visitors and tour operators and encourage greater numbers of visitors to the area increasing revenue to rural communities.

### Recommendation:

Extend the Rota Vicentina walking route to Lagos, extend length of Fisherman's Trail loops and develop 4-5 local walking routes at overnight hubs on the Rota Vicentina. Extend the length of the Grande Rota do Guadiana further north along the Guadiana River into Alentejo. Provide signage of an international comparative quality on the Via Algarviana.

### Action Rationale

- [Extend the Rota Vicentina to Lagos \(action 09.01\)](#). This has been identified as a priority for the 2016-2017 period by Rota Vicentina and will provide an additional three days walking opportunities along the south coast along very attractive coastline. Importantly this also connects the Rota Vicentina with a significant accommodation centre and with the rail line to Faro which in turn connects to Faro Airport (see map 4 for indicative detail).
- [Extend Fisherman's Trail from Odeceixe to Cape St Vincent \(action 09.02\)](#). The Fisherman's Trail within the Algarve region currently consists of several looped routes, each of which could be extended to make this a longer proposition and thus enhancing its appeal to visitors.
- [Develop four looped walks at overnight hubs along the Rota Vicentina \(action 09.03\)](#). This provides additional walking opportunities for visitors, increasing dwell time and associated revenue for those communities.



- Extend the scale of the Grande Rota do Guadiana along the length of the Guadiana River to Mertola (action 09.04). This will link the Algarve and Alentejo regions and will create a significantly larger trail. Odiana Association already have an agreement in principle in place regarding this. The route would then link to the Camino de Santiago and link to an area with different identity, environment, and cultural heritage (see map 4 for indicative detail).
- Provide and maintain essential directional and interpretative signage along the Via Algarviana, Rota Vicentina and Grande Rota do Guadiana (action 09.05). This must be of internationally comparative standard and ensures visitors have confidence in route finding. This signage must also be maintained and replaced when damaged. (Almargem estimate that 280 new signposts are required annually at a cost of around €19,600).

## LOCAL WALKING ROUTES

### Strategy:

Provide local walking routes in the Algarve as complementary experiences to the longer linear regional routes and as complementary recreational opportunities for the beach positioning the Algarve as an activity destination and encouraging return visits for walking & cycling holidays.

### Recommendation:

Develop a coastal walking route between Lagos-Burgau and Salema-Sagres; identify and promote short walks near beach destinations.

## Action Rationale

- Provide a coastal walking route between Lagos and Burgau and Salema and Sagres (actions 10.01 and 10.02). These parts of the coast have the opportunity to provide exceptional visitor experiences given the views and proximity to holiday destinations. Ideally this would take place as part of the provision of the Ecovia do Algarve & Rota Vicentina route, while accepting that some sections, such as most of the Salema to Sagres coastal route are more suited to walking than cycling and the Ecovia do Algarve route would need to follow the adjacent road (see map 4 for indicative detail).
- Identify opportunities for and promote short walking experiences in proximity to holiday destinations (action 10.03). This will provide additional visitor experiences and contribute to the positioning of the Algarve as an activity destination. (See also action 26.06 regarding promotion of these routes).

## ENSURE VISITOR SAFETY

### Strategy:

Ensure visitor safety and avoid negative impact on destination reputation by ensuring safe provision of recreational facilities.

### Recommendation:

Undertake and require inspection of existing local walking routes and associated infrastructure and identify places with dangerous infrastructure that must be addressed as a priority.

### Action Rationale

- Review all local walking routes in terms of visitor safety and temporarily close those which do not meet acceptable standards. A priority is the coastal walking route between Lagos city and Praia do Pinhão (action 11.01). Dangerous walking routes open to the public must be closed with barriers to pedestrian traffic and clear signage until issues are rectified. This is in the interests of visitor safety and destination reputation. Visitor safety is of paramount importance and currently some trails, such as that between Lagos and Praia do Pinhão do not meet acceptable standards of recreational facility provision to erosion, lack of safe barriers, lack of safe infrastructure and lack of safe roadside walking trails. All local walking routes require inspection to ensure they meet an acceptable standard before being promoted on a regional walking trails website.

## SUPPORTING MEASURES - WALKING

### Strategy:

Provide visitors with the opportunity to engage within a cultural heritage and increase visitor dwell time through provision of urban heritage trails.

Maximise opportunities and information available on appropriate trails for disabled visitors.

### Recommendation:

Develop urban heritage trails in towns with significant built heritage.

Identify opportunities for multi access trails (for use by disabled visitors and families with buggies) as part of an Access for All programme for the Algarve.

## Action Rationale

- Develop Faro Heritage Trail as a pilot initiative as part of Algarve Heritage Trails programme (action 12.01). This will help to increase visitor dwell time and associated visitor spending in Faro, enhance visitor experience; and help to position Faro as a cultural heritage destination.
- Develop Algarve Heritage Trails in other towns rich in built heritage. It is envisaged the first phase could include Lagos, Loulé, Tavira, Vila Real de Santo António, Alcoutim, Portimao and Silves (actions 12.02). Some, such as Loulé, Alcoutim (Delights of Alcoutim) and Vila Real de Santo António (interpretative signage in place) already have a base to expand upon. These walks of 45-90 minutes will provide visitors with an interesting defined route around the centres of each city or town highlighting places and buildings of interest with associated directional, orientation and interpretative signage. The objective being to retain visitors for longer so they spend more; to enhance the visitor experience; and to position the Algarve as a cultural heritage destination (see map 4 for indicative detail). This initiative could then be extended to other urban areas where such a trail would be appropriate.



- Identify existing or potential multi access trail sections on each regional linear walk and increase quality of trail surface to multi-access quality (action 12.03). Accessible tourism, also referred to as access for all, is an essential component of tourism planning to ensure that facilities that are provided can be of use to the maximum number of visitors and that none are excluded where possible. Some existing trails, such as the beach trail at Alvor, are already suitable multi-access trails. Others can be identified that are or can be developed as multi-access trails under identified standards for such trails. An accessible tourism approach must consider a variety of additional issues as only 8-10% of disabled visitors use wheelchairs, others may be deaf or partially sighted/blind or have other disabilities.



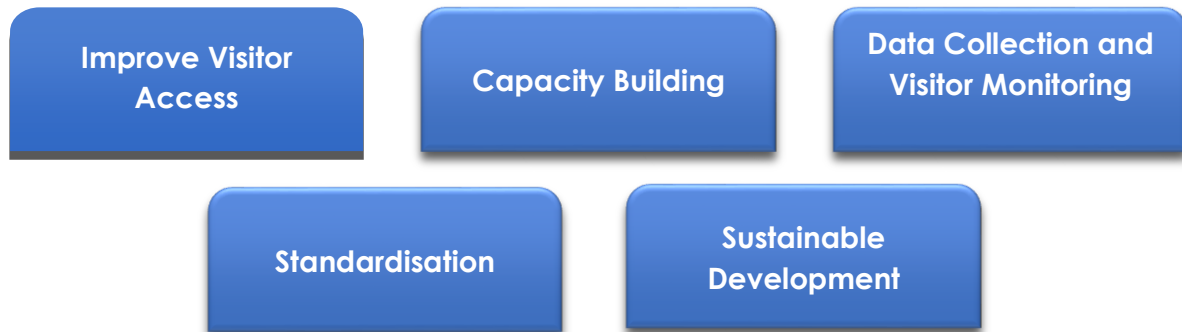
### MAP 4: Proposed Walking Routes



**KEY:**

- Grande Rota do Guadiana
- Rota Vicentina Historical Way
- Rota Vicentina Fishermans Trail
- Rota Vicentina Extension
- Via Algarviana (300km)
- Ecovia do Litoral (214km)
- A Lagos (Ria Alvor) - Portimão (Rio Arade)
- B Faro (Pontes Marchil) - Bias do Sul (Olhão)
- C Altura (Castro Marim) - Retur (Castro Marim)
- Heritage Trails
- Rail Line
- A Link 1 Parises - São Brais de Alpartel (18.4km)
- B Link 2 Loulé Train Station - Salir (28.2km)
- C Link 3 Mexilhoeira Train Station - Monchique (25.4km)
- D Link 4 Lagos Train Station - Bensafirim (10.1km)
- E Link 5 Marmeleite - Aljezur (18.6km)
- Local Walks on Via Algarviana

## 2.4.4 Product Enablers and Quality Management



### IMPROVE VISITOR ACCESS

#### Strategy:

Improve visitor access opportunities within the Algarve region to ensure that visitors can find relevant information while on their holiday, travel to and from their destination with ease and have a positive experience

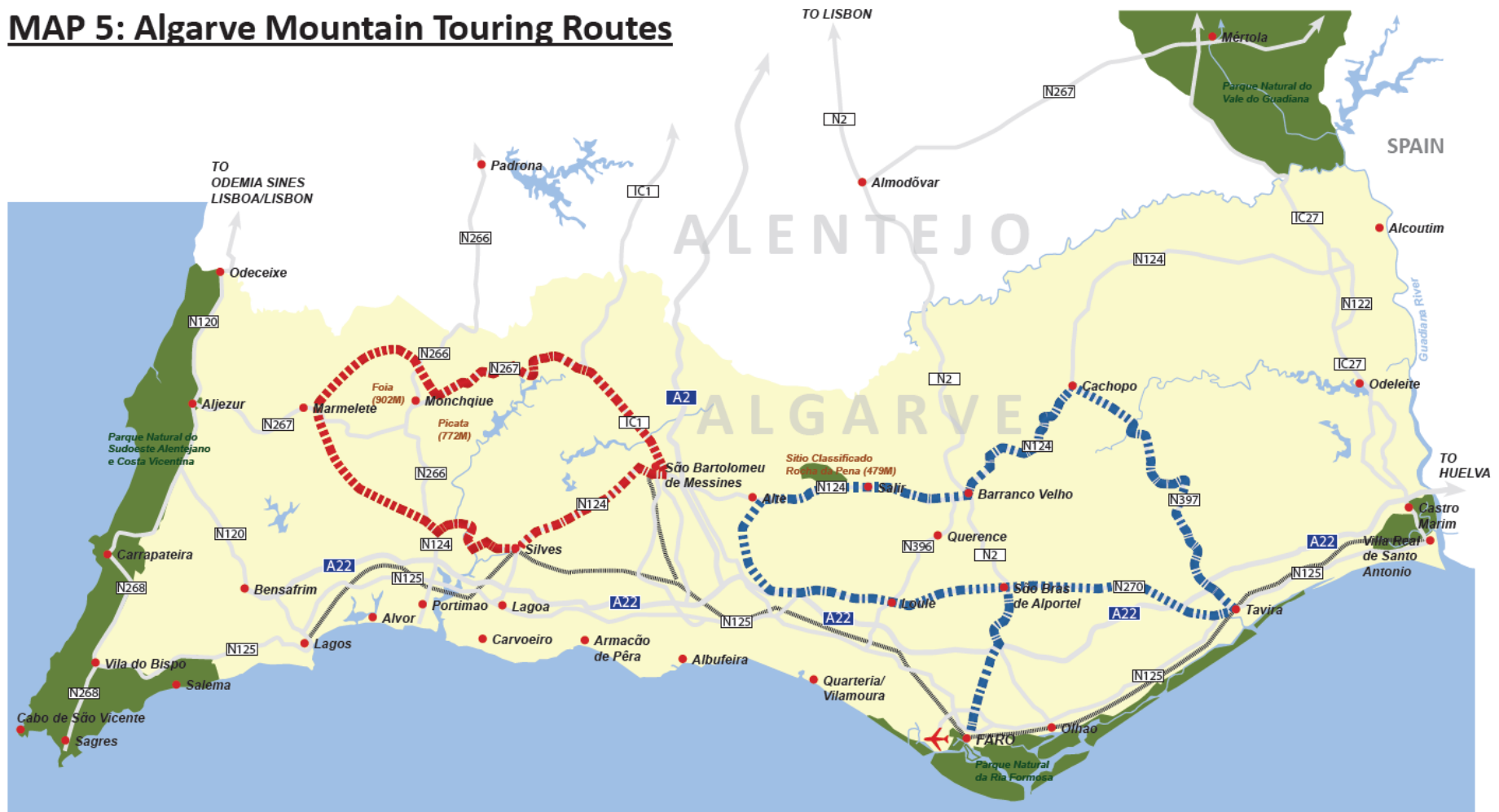
#### Recommendation:

Provide comprehensive public transport information; provide bus service between Faro Airport and Faro Train Station; provide car-based mountain touring routes; provide public transport connections to destination hubs; extend opening hours in tourist information offices and interpretative centres as part of an Algarve Open for Business campaign and introduce an Access for All campaign.

### Action Rationale

- Provide visitors to the Algarve with comprehensive information on public transport options on the proposed Algarve trail website (action 13.01), (and see action 27.02 regarding trails website). This is to encourage greater use of public transport in tandem with cycling and walking activities.
- Develop Algarve Mountain Touring Routes for the east and west of the region (action 13.02). These two routes are inland car-based touring routes to link inland visitor hubs to drive visitor traffic to walking destinations and shorter loop trails. The aim of these driving routes is to direct domestic and international visitors to those places which are of interest for cycling and walking through the use of signposting and maps. The routes will also take in the most scenic areas of the region. The western route will be focused around Foia and the eastern route around Rocha da Pena (see map 5 for indicative detail). Routes to be determined as part of a feasibility study.

## MAP 5: Algarve Mountain Touring Routes



**KEY:**

- - - - - Algarve Mountain Touring Route East (indicative)
- - - - - Algarve Mountain Touring Route West (indicative)
- - - - - Rail Line

- [Provide a bus service between Faro Airport and Faro train station \(action 13.03\)](#). This is to be integrated with train departure times providing a seamless transition between arrival and use of public transport. This enhances the visitor experience and is based on similar initiatives elsewhere, particularly in Switzerland and Mallorca. It is envisaged EVA would have a key role to play to ensure the success of this initiative. Buses should also be able to carry bicycles to enable those who wish to bring their bike to take it from the airport to bus, onto the train and to the start of a trail.

- [Map destination hubs and provide integrated bus services based on the location of these hubs \(action 13.04\)](#). This is based on a similar initiative in



Switzerland which enables visitors to start and finish trails at places of their choosing and return to the start or to a nearby larger visitor centre. Linked to this is the provision of up to date timetables for rail and bus services on a regional trails website (see action 27.02).

- [Initiate an Algarve Open for Business Campaign \(actions 13.05-13.08\)](#). This includes extending the opening hours of tourist information offices and ICNF interpretation centres as well as aiming to ensure places of interest to visitors are open to access, where appropriate, is based the findings of site visits undertaken by TDI and consultation. The Algarve Open for Business campaign is targeted towards those businesses and venues which close in winter months to try to encourage places to stay open for more of the day and for more of the season. The aim of this programme is to provide an improved experience for walkers and cyclists, many of whom are combining elements of cultural heritage with their recreational experience.
- [Introduce an Access for All campaign in the Algarve \(action 13.09\)](#). This is so people with disabilities or those that need certain types of trails or access such as those with small children can find information they require easily. One example is to identify and provide multi-access walking trails and to indicate the location of these on a regional trails website (see action 27.02). This replicates established best-practice in other destinations.
- [Investigate optimum means of provision of a one way baggage transfer service between destinations & accommodation for walkers and cyclists \(action 13.10\)](#). This could include consideration of various options such as a one-way bike drop off for cyclists. This could be piloted in the area with the highest demand.

## CAPACITY BUILDING

### Strategy:

Build capacity and offer training measures to improve services and facilities associated with cycling and walking.

### Recommendation:

Utilise best-practice training models; offer guides to setting up business; and organise training programmes, related to activity tourism, for tourist information office staff.

### Action Rationale

- Replicate the private sector training model established by Faro Municipal Council (action 14.01). This envisages this innovative initiative being reproduced in some of the other municipal councils in the Algarve to build capacity and encourage entrepreneurs. For the purposes of this project this action is targeted towards bike hire businesses, tour operators, guides, and small accommodation.
- Stimulate small business development through provision of market information and identification of key walking and cycling opportunities. Also include a 'How to set up a Small Business Guide' on the Turismo do Algarve website (action 14.02). This addresses the issue of many people being deterred from establishing small businesses, such as trailside accommodation or restaurants, due to lack of awareness of opportunities and scale of administration required to set up a small business.
- Organise visits for customer facing staff such as tourist information office to cycling and walking trails (action 14.03). This aims to raise awareness about the cycling and walking opportunities in the Algarve so they can promote these opportunities to visitors with first-hand experience. For tourist information staff this is considered essential so they are aware of the product.
- Provide training for businesses along the route of regional trails (action 14.04). This is part of the initiatives planned under the next phase of the Eurovelo route development as part of the Enabling Friendly Communities programme.



- [Develop training programme for local guides \(action 14.05\)](#). This aims to provide a means for local communities to share their stories, to engage with visitors and to use tourism for local economic benefit.
- [Develop a programme to engage schools in trail development and associated commercial opportunities \(14.06\)](#). Rota Vicentina Association have a plan in place developed by a company called Sair da Casca to help students aged 15-18 work on commercial initiatives associated with Rota Vicentina to develop opportunities for rural diversification. It is envisaged this would be a pilot demonstration project.

## DATA COLLECTION AND VISITOR MONITORING

### Strategy:

Increase awareness of visitor volume and trends, inform decision making and to encourage public and private sector investment.

### Recommendation:

Improve the range and quality of information regarding visitors, including information from visitors at Faro Airport and those on regional trail networks through introduction of an exit survey at Faro Airport, visitor monitoring plans for regional trails to include numeric data collection through installation of trail counters; carrying capacity research regarding visitor impacts; and qualitative research such as socio-economic and visitor satisfaction research.

## Action Rationale

- [Design and undertake an exit survey at Faro Airport \(action 15.01\)](#). This will help to determine visitor numbers, profile, activities and experience and inform decision making by ANA and Turismo do Algarve.
- [Commission visitor monitoring plan for the regional trails of the Algarve \(action 15.02\)](#). This initiative includes numeric data collection through installing data counters at the start of each section of the Ecovia do Algarve, Rota Vicentina, Grande Rota do Guadiana, and Via Algarviana to monitor trail usage and build a profile of visitor use. From this the expected increase in user numbers, combined with an estimated daily average revenue figure per user can be used to build the case for investment and maintenance and can be used to inform decision making and planning. This action also includes carrying capacity research to ensure negative visitor impact are minimised; and socio-economic and visitor satisfaction/experience research to determine visitor patterns and trends. Economic studies will also make the success visible through quantified economic evaluation.



Initially the data counter programme will include a pilot programme on the Via Algarviana, Rota Vicentina and on the first phase of the Ecovia do Algarve. TDI recommends that these three trails are included in the programme because of the urgency of collecting numeric visitor data on each of these trails. It is recommended that AATDA commission a feasibility study from a suitable company regarding the further implementation of a visitor monitoring programme.

## STANDARDISATION

### Strategy:

Standardise the approach to cycling and walking facility development and to the provision of associated services, thus enhancing visitor experience with the aim of increasing the number of visitors coming to the Algarve for cycling and walking and the reputation of the Algarve as a cycling and walking destination.

### Recommendation:

Introduce signage strategies for both roads and trails, trail classification standards, a quality system for interpretative guides and a standardised approach to information provision in tourist information offices.

## Action Rationale

- Commission a road signage strategy for the Algarve and introduce a standardised approach to road signage (action 16.01). Currently road signage is adequate at an inter-urban level but very inadequate at a local level. For example visitors to the majority of urban areas in the Algarve would find it very difficult to find their way into or out of the centre of cities and towns making the driving experience difficult. This extends to trying to find the start of walking routes, particularly local walking routes, and the start of sections on regional routes.
- Commission a signage strategy for cycling and walking trails (action 16.02). While there is currently no standard approach to the provision of cycling and walking signage, much signage has already been installed on some routes such as Rota Vicentina, Via Algarviana and Grande Rota do Guadiana at a significant expense, including the contribution of public funding; so it is unlikely to be practical or desirable to suggest that all signage be replaced with a common template.

It is recommended signage provision be based on overall guidance regarding signage such as hierarchical layers, in line with international best practice, with common rules including the provision of **Orientation signs** ('you are here' map type signs indicating the locations of sites of interest relative to a visitor's current position); **Directional signs** (finger signs guiding visitors to and from sites of interest); **Interpretive signs** (giving the visitor interpretive information relating to a particular attraction/site). The goal should be that visitors experience a trail that is suitable for them, that they don't get lost, and that they obtain information about what they can see along the route.

Other elements include use of **Codes of Conduct** on orientation signage, and warning signs if trails are used for cycling and walking to reduce the incidence of user conflict. The guidance should also indicate appropriate materials and design for trail signage to ensure clear signage, reduce maintenance costs, and ensure a common quality standard. Guidance could and should extend to the quality of interpretative signage such as equal proportions of text, graphics and blank space so to signage is not too cluttered.

- [Identify common classification standards for all existing and new cycling and walking trails and implement \(actions 16.03 and 16.04\)](#). This is based on international best practice and means a trail is attributed a grading based on width, gradient and nature of the trail surface, for example easy, medium, difficult/hard, multi-access/family friendly. These could also be colour coded. A fundamental principle in the planning and development of trails is that it should meet the need and expectations of those that use it and that it is appropriate for the land type within which it is located. Trail classification requirements will ensure that this is the case and that visitors are aware of the grade of the trail and their experience enhanced.

FCP currently have trail standards for cycling routes which can be applied to the Algarve. It will be essential to ensure that these trail standards align with those for Eurovelo trails with regards to the Ecovia do Algarve. While Federação de Campismo e Montanhismo de Portugal have standards for walking trails, some key stakeholders in the Algarve have indicated they are concerned these need to be reviewed and simplified. It is envisaged these walking and cycling trail standards would be reviewed and implemented by AATDA with official certification from either Federação de Campismo e Montanhismo de Portugal or FCP.

- [Require new sections of the Ecovia do Algarve to meet agreed Eurovelo standards](#); introduce a common signage standard for the route; and introduce a user code of conduct for the route. These actions aims to ensure that the quality of the visitor experience is enhanced and the reputation of the Algarve as a high quality cycling destination is prioritised (actions 16.05 to 16.07).
- [Introduce a quality system for guiding services \(action 16.08\)](#). This reflects the fact that many do not provide a quality service and visitors do not have as good an experience as they could otherwise have. This quality system also include first aid training and could be modelled on the Blue Badge guide training scheme in Manchester.
- [Withdraw the current publication 'Walking Trails in the Algarve' from sale \(action 16.09\)](#). Many of the trails within this guide are difficult to find and information and the quality of many of the trails is not of comparable international quality. Provision of this type of detail on a website enables accurate updating and for visitors to download data to smartphones and to search for cycling and walking based on their desired experience and their ability.
- [Ensure a standardised and consistent approach to information provision in tourist information offices \(action 16.10\)](#). Visitors to different tourist information offices may currently be given inaccurate and inconsistent information in one office which may conflict with that given in another office. Training of front office staff would hugely improve the situation and enhance information provision and visitor experience (see action 14.03 regarding training).



## SUSTAINABLE DEVELOPMENT

### Strategy:

Ensure the growth and development of low impact activity tourism is sustainable, negative impacts are minimised and positive impacts, particularly on rural livelihoods, are maximised.

### Recommendation:

Protect the natural, cultural and built heritage resources that are essential in attracting visitors to the Algarve. Ensure that growth of cycling and walking is plan-led and sustainable, and does not lead to a degradation of the product and swamping of the market through inappropriate marketing, for example marketing trails which are not market-ready.

### Action Rationale

- Integrate product development proposals into existing and future strategic plans, particularly those associated with attracting European funding such as Algarve Mobility Plans (actions 17.01-17.03).
- Contribute to making the Algarve a better place to live in and to visit by focusing growth on key identified hubs (action 17.04). This means promotion follows development of market ready product and associated facilities that will contribute to sustainable socio-economic development.
- Stop any future inappropriate intensive agricultural development within the Parque Natural Sudoeste Alentejano e Costa Vicentina through increased support for ICNF (action 17.05). This is essential as the current development of intensive agriculture in this area is unsustainable and threatens the natural environment upon which activity tourism depends. This role is currently being led by ICNF who have limited resources. There needs to be a zoned approach taken by the relevant municipal councils who can state which areas are 'Open to Consideration' for intensive agriculture' and which areas are 'Not open to Consideration' for example coastal and sensitive areas along the Costa Vicentina.
- The concepts and programmes outlined above are designed with principles of responsible tourism in mind. Responsible tourism can be said to have the following common characteristics:
  - minimises negative economic, environmental and social impacts;
  - generates greater economic benefits for local people and enhances the wellbeing of host communities, improves working conditions and access to the industry;
  - involves local people in decisions that affect their lives and life changes;

- makes positive contributions to the conservation of natural and cultural heritage, and to the maintenance of the world's diversity;
- provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues;
- provides access for physically challenged people;
- culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence.



## 2.4.5 Accommodation Diversification and Development

Familiarisation &  
Training

Facility Upgrade

Rural Tourism  
Accommodation

### FAMILIARISATION & TRAINING

#### Strategy:

Increase understanding and awareness of best practice for provision of facilities and services for cycling and walking tourism and of local opportunities for cycling and walking for accommodation providers in the Algarve.

#### Recommendation:

Organise international and domestic familiarisation visits to visit examples of best practice in the provision of facilities for walkers and cyclists; and to local examples of market-ready cycling and walking trails as part of a training programme for hotel staff.

### Action Rationale

- Organise a series of international familiarisation visits to visit examples of best practice in provision of facilities for walkers and cyclists (action 18.01). This will include visits to international best practice facilities e.g. Bike Hotels in Italy and Mallorca.
- Organise familiarisation visits to cycling and walking trails and examples of local best practice in provision of facilities for walkers and cyclists for hotel reception staff (action 18.02). This will include visits to existing trails and new trails so that hotel staff can promote them from first-hand experience.
- Provide a training programme for best practice in providing services for cycling and walking tourists such as catering and storage (action 18.03). In tandem with familiarisation visits a training programme on how to cater for and to attract increased numbers of walkers and cyclist will provide hotels and other accommodation providers with tools to tap into this growing market. (See also action 19.01 regarding guidelines for accommodation sector).



## FACILITY UPGRADE

### Strategy:

Improve the standard of facilities and services offered to walkers and cyclist so accommodation offers meets their needs, improving their experience of the Algarve and encouraging repeat visits.

### Recommendation:

Improve the standard of facility and service provision in the accommodation sector through preparation of guidelines for the provision of facilities and services for walkers and cyclists as part of a wider programme linked to funding for the provision of associated infrastructure, certification schemes such as Bike Friendly Hotels and Walkers Friendly Hotels, and minimum standards to enable promotion on a regional trails website.

### Action Rationale

- Prepare guidelines for accommodation sector in relation to the provision of cycling and walking facilities and require accommodation providers to meet a minimum standard to be able to be promoted on the regional trails website (action 19.01). These guidelines, to be prepared by AADTA, will form the basis of minimum standards for those hotels who wish to be promoted as accommodation suitable for cyclists and walkers.
- Consider mandatory membership for hotels in respect of the existing Bikotel programme and a new Walker Friendly Hotels certification scheme to be included on Algarve trails website (action 19.02). This replicates the highly successful scheme that is in place along the route of La Loire a Vélo which provides certainty to visiting walkers and cyclists that the accommodation will provide facilities and services to suit them such as bike storage/cleaning, high nutrition meals and meals at certain times e.g. late lunch for walkers. While TDI recommends this measure due the success of this type of initiative elsewhere, AATDA may wish to consider this issue further in conjunction with local partners.
- Investigate opportunities for provision of bike hire facility or concession (action 19.03). To encourage greater numbers of visitors to engage with cycling hotels need to offer on-site bike hire. While this could be offered directly it has been the experience of some hotel owners in Ireland that it is more efficient to offer this service as an in-house concession run by a private specialised operator.

## RURAL TOURISM ACCOMMODATION

### Strategy:

Address the lack of accommodation capacity in rural areas associated with regional trails to enable increased numbers of visitors and groups to visit and stay in rural areas benefitting the rural economy and livelihoods.

### Recommendation:

Increase accommodation supply in targeted rural areas through provision of funding for rural accommodation provision.

### Action Rationale

- Encourage applications for funding for provision of rural tourism accommodation, associated with regional trails (action 20.01). This initiative will assist people who wish to upgrade existing or build new accommodation in rural areas alongside regional trails e.g. the eastern half of the Via Algarviana or the Grande Rota do Guadiana. This will enable increased numbers of visitors to book accommodation and increase the volume of visitors and revenue to rural areas.

### 2.4.6 Access

## ENABLING BETTER ACCESS

### Strategy:

Improve visitor access to recreational opportunities to the Algarve region.

### Recommendation:

Increase the frequency of flights and the number of direct flights from key source markets, particularly in winter months through negotiation with airlines and continuing the reduction in winter airport charges.

### Action Rationale

- Negotiate with airlines to increase year-round flight schedule (action 21.01) and continue trend of reducing Faro Airport charges in the winter (action 21.02). This initiative is to discuss, with airlines that connect key source markets such as the UK and northern Europe to the Algarve, the option to increase the frequency of flights during winter months and to provide more direct flights, for example between Germany and Faro. This, in tandem with the continued trend for the reduction of airport charges during winter months, aims to increase the number of flights to the Algarve, improve loads factors and, along with product development and marketing initiatives, increase the number of walkers and cyclists attracted to the Algarve.

### 2.4.7 Sales Development and Marketing Communications

The launch of a new product or destination in a crowded marketplace requires the dissemination of substantive information about the new offer and promotional activities to generate interest in it. This is especially the case in respect of tourism destinations where the product is physically removed from the consumer who is dependent in making travel decisions on information supplied through media features, websites and social media, travel intermediaries and word-of-mouth from friends, family, and other contacts.

The AIDA marketing principle – awareness>interest>desire>action – applies especially for new destinations and their product offer, or where a destination is seeking to diversify its tourism product offer and broaden its market perception and appeal, such as is the case in the Algarve.

The key tools to achieve the necessary awareness and to commence the process of stimulating interest and desire for the destination product, leading to action to purchase it, include:

- Familiarisation visits for travel intermediaries and media;
- Overseas trade and consumer fairs/shows and associated roadshows to key population centres targeted at either, or both, the travel trade and consumer groups;
- Website development and use of social media to show the destination product offer;
- Events – such as festivals and contests – in the destination related to the specific product development;
- Joint promotions between the destination and overseas operators;
- Other support for the international travel trade – airlines, tour operators (e.g. brochure support).

The standard approach to destination marketing is that where a destination is in the process of establishing its market image, investment in marketing is provided largely from the public purse, the return on investment being the foreign exchange income, investment in plant and equipment, business creation, employment and other economic, as well as social benefits overall for the destination. This principle applies equally where the destination is seeking to make a sea change in its tourism product offer aimed at broadening the markets and segments it attracts.

Private sector operators are responsible for providing the products and generating demand for them through their own marketing and sales initiatives. However, they will not be persuaded to make the necessary investment in plant and equipment without some degree of confidence in the appeal of the destination as a whole.

**The development of new bundled offers or packages for cycling and walking will also be important. Hotels and other accommodation providers will be encouraged to develop such offers to engage the international travel trade, including airlines, and to ensure the Algarve is positioned to cater for increased demand for walking and cycling'.**

The onus in creating awareness of the Algarve as a cycling and walking destination rests with the destination's marketing entity, albeit in collaboration with the private sector operators. Once established as a cycling and walking destination, and as the focus of marketing moves on from awareness creation to the stimulation and realisation of demand for cycling and walking visits, a more even split can be employed for the funding of marketing, promotion and sales activities.

The Algarve faces the twin challenges of growing its cycling and walking business from its present small base while broadening and deepening market awareness of its current and evolving cycling and walking product offer. The marketing communications and sales development programme therefore consists of these two distinct but complementary priorities:

- Sales Development Plan;
- 2016-2018 Market Awareness Development Plan.

The short term sales development plan is designed to generate business for the existing routes and trails that meet international standards

The short term sales development plan is designed to generate business for the existing routes and trails that meet international standards; while the market awareness development plan which will run alongside the sales development campaign initially will create a wider awareness of the region's product offer in respect of cycling and walking, leading to increased demand.

## 2016 Sales Development Plan



### ALGARVE CYCLING AND WALKING ROADSHOW IN MAIN MARKETS

#### Strategy:

Undertake a concerted programme of direct contact with specialist cycling and walking tour operators, travel agents, interests groups and associations, and media in primary generating and growth markets during spring 2016 in order to generate business for existing cycling and walking operators in Algarve featuring routes and trails that are of a standard to deliver positive experiences of the quality demanded by international visitors.

#### Recommendation:

Participate at trade and consumer travel fairs in international markets, combining such participation with both sales calls with key tour operators with cycling and walking programmes, and presentations at a circuit of the main centres of demand in each generating market to specialist travel agents and interest groups.

### Action Rationale

Spring 2016 campaign (action 22.01) targeting demand for the following autumn, followed by an autumn campaign to generate business in the early months of the following year. Key activities to include:

- Participation at all trade and consumer travel shows (action 22.02), as part of the Turismo de Portugal stand, taking place in Europe during these periods (in particular the ITB in Berlin in March 2016), in addition to the specialist cycling and walking events such as Fiets en Wandelbeurs Cycling and Walking Fair in Utrecht ([www.fietsenwandelbuers.com](http://www.fietsenwandelbuers.com)) which has 30,000 people a day attending, and others in Belgium (Antwerp) and Germany (Dusseldorf). This will increase contact with key consumers and activity operators in key markets.
- Development of a network of contacts with specialist organisations and interest groups in cycling and walking e.g. associations, media, and tour operators, by a) Conducting a series of presentations to specialist cycling and walking travel organisations, interest groups and media through a roadshow to main centres of population following each travel show/fair attended (action 22.03); and b) making sales visits and organising familiarisation visits to the Algarve to inspect the routes, trails and facilities available for cyclists and walkers (action 22.04);

- The creation of a [high quality, interactive website](#) material for inclusion on Algarve adventure tourism website with strong audio visual content on the experiences available in the Algarve (details in action 27.02 and see rationale below under 'Website: the Key Marketing and Promotional Tool'.)
- [Encourage hotels and other accommodation providers to develop new bundled offers or packages for cycling and walking for sale online and to engage the international travel trade \(action 24.05\)](#). This includes offers on businesses own websites or through travel agents to link product offers with accommodation and transport; providing market ready packages to ensure the Algarve is positioned to cater for increased numbers of walkers and cyclists.

## COMMUNICATIONS AND AWARENESS DEVELOPMENT AMONG ALGARVE ACCOMMODATION OPERATORS

### Strategy:

Increase awareness of opportunities associated with cycling and walking tourism in hotels and resorts and facilitate provision of information about cycling and walking in hotels and resorts.

### Recommendation:

Present key findings of this report at focussed meeting with stakeholders; recommend businesses engage further with cycling and walking product offer; provide standard template for in-room information and branded brochure racks.

### Action Rationale

- [Communicate key findings from this study at focussed meetings with stakeholders that recommend businesses further engage with cycling and walking product offer \(action 23.01\)](#). This will give an opportunity for AATDA to provide the accommodation sector with information on the economic case for engaging with cycling and walking tourism. It will also be an opportunity to encourage hotels to contribute to, and support, the AATDA and the Rota Vicentina Association.
- [Provide standard template for in-room information on things to see and do in the Algarve and encourage use \(action 23.02\)](#). Providing information in hotel rooms, for example on local routes or tour operators is an opportunity to provide visitors with additional information on activities in the area.
- [Provide branded brochure racks for hotels and resorts to promote activity and adventure product providers \(action 23.03\)](#). Providing high quality brochure racks in hotel reception areas facilitates a route to market for many small tour operators and may increase dwell time, provide visitors with an enhanced experience on their holiday and increase their likelihood of returning to or recommending the Algarve to others.



## BUSINESS TO BUSINESS (B2B) AND BUSINESS TO CONSUMER (B2C)

### Strategy:

Create, strengthen and maintain the trading relationships between local activity operators and accommodation providers in the Algarve with international tour operators, travel agencies and specialist clubs and associations on cycling and walking.

### Recommendation:

Local operators to undertake B2B activities in overseas markets through sales calls (supported by email and phone contact), attendance at relevant trade shows, distribution of sales literature outlining the services and terms, and hosting (or supporting through in kind provision of equipment, accommodation or other services) selected primary prospective producers of cycling and walking tourists on inspection visits to the Algarve. The development and operation of high quality website by individual local operators, including audio visual material, targeting prospective cycling and walking tourists will be the primary B2C marketing activity. Full coordination between the ATA-led sales development team efforts and the activities of individual operator's ability to target individual providers in the Algarve would be beneficial to all parties.

### Action Rationale

- **Trade client servicing (action 24.01).** Given the weak current awareness of the Algarve's potential for providing strong experiences for cycling and walking visits outside the main summer months, local activity operators and accommodation providers should focus on building their relationships with a network of leading specialist operators (i.e. tour operators, travel agencies and specialist clubs and associations). The sequence of creating awareness, generating interest and converting such interest into bookings will necessitate establishing personal contacts through regular sales calls, followed up by email and phone contact.

- [Attendance at trade shows/fairs and presentations in main centres \(action 24.02\)](#). In tandem with the proposed AATDA and ATA, individual local operators should participate at selected, relevant overseas trade shows in order to liaise with leading specialist operators (i.e. tour operators, travel agencies and specialist clubs and associations). The roadshow of presentations following the travel show organised by ATA will require active participation by local providers of cycling and walking services, as well as accommodation operators. This will be part of the process of demonstrating the local business's capability to the foreign travel trade.



- [Hosting and support for overseas trade inspection visits \(action 24.03\)](#). The need to build up the awareness of the possibilities for cycling routes and walking trails in the Algarve can best be illustrated by inviting key decision makers of specialist international tour operators, travel agents and clubs/associations to sample a selection of the market-ready routes and trails. Options are: to set up an inspection trip for a foreign operator who has shown interest on a one-to-one basis; or to work with other local operators and with AATDA and ATA, on a group familiarisation trip where local operators make contributions through the in kind provision of equipment, guides, lodging etc.
- [Sales literature and website \(action 24.04\)](#). The production of clear and informative sales literature spelling out the range of services offered, and demonstrating the quality of service provided, remains an important tool of trade for local providers. Also, the development of a high quality, interactive website, enabling tours to be sampled through audio visual access, is both important for the prospective tourist and the international travel trade by demonstrating of the serious intent and capability of the local company to deliver quality experiences.

## ALGARVE WALKING FESTIVAL

### Strategy:

To create a focal event that will draw attention to the Algarve as a specialist destination for walking.

### Recommendation:

To establish the Algarve Walking Festival in October 2016, creating a varied series of walks of different lengths and difficulty using trails throughout the Algarve that are fully up to international standard, with a programme of evening events showcasing Algarve's nature and cultural heritage.

### Action Rationale

- Establish an Algarve Walking Festival at the beginning of the walking season in October (action 25.01). This event will aim to indicate the Algarve is 'open for walking' with multiple activities in several locations.
- Establish an Algarve Walking Festival Committee (action 25.02) to plan the schedule of walks and coordinate with AATDA and the respective organisations responsible for the trails, and to organise and manage the programme of evening events
- Promote the Algarve Walking Festival online and in direct communications with specialist walking tour operators, interest groups and media (action 25.03).



## 2016-2018 Market Awareness Development Plan

Market Awareness of  
Algarve Cycling &  
Walking

Marketing and  
Promotional  
Tools

Events &  
Festivals

### MARKET AWARENESS OF THE ALGARVE'S CYCLING AND WALKING ATTRACTIONS - PRODUCT MARKETING FRAMEWORK

#### Strategy:

Position the Algarve as a destination offering a range of tourism experiences throughout the year targeted at a wide range of market segments from all European markets and further afield with a campaign based around '*Experience a Different Algarve – Explore the Outdoors!*' as a framework for the marketing of a wide range of experiential tourism including cycling and walking as part of an adventure tourism theme, complementing the summer sun and golf segments.

Increase awareness in domestic and in prioritised international markets such as northern Europe of the Algarve as an adventure tourism destination with world-class cycling and walking experiences.

#### Recommendation:

Coordinate the promotion of cycling and walking as part of Algarve Adventure Tourism under single brand architecture of '*Experience a Different Algarve – Explore the Outdoors!*'. This over-arching brand can be used to promote other experiences including food and cultural heritage, as well as the summer sun and golf product offerings.

Increase awareness of the Algarve adventure tourism product through coordinated promotion; attendance at specialised trade fairs; focussed engagement with journalists, travel writers and cycling and walking associations in key markets; promotion of appropriate cycling and walking opportunities in close proximity to beach destinations as an add-on activity; developing bundled activity packages; and the promotion of the Ecovia do Algarve as a flagship attraction for cycling and walking

#### Action Rationale

- Develop destination re-positioning based around '*Experience a Different Algarve – Explore the Outdoors!*' brand (action 26.01). This includes associated domestic and international marketing campaigns.

- Promote market ready cycling and walking experiences as part of the 'Experience a Different Algarve – Explore the outdoors!' campaign (action 26.02). This includes associated branding and coordinated promotion of the Algarve cycling and walking product offer by ATA and trail management organisations with an extension of reach to international markets. It is essential that current marketing and promotion is targeted to those elements of the cycling and walking product offer which are considered market ready such as Rota Vicentina, sections of the Via Algarviana and the Grande Rota do Guadiana. When new products are considered market ready then these can be included in the overall Algarve product offer.
- Increase awareness of the cycling and walking product offer in key overseas markets and in domestic markets including the expatriate market in the Algarve region (action 26.03). This programme should be considered in tandem with action 21.01 to negotiate with airlines to increase the volume and range of flights during winter months. This includes new markets such as Norway, Sweden, USA, UK and the fastest growing markets for both cycling and walking which are considered to be Holland/German/USA/Canada.
- Capitalise on the opportunity presented by the volume of summer visitors travelling through Faro Airport (action 26.04). In tandem with the upgrade of the airport, large promotional imagery and video screens could project images of adventure tourism, primarily cycling and walking in the Algarve to help position the region as an adventure tourism destination. This includes use of an 'Algarve Winter Cycling' and 'Algarve Cycling Destination' campaigns developed by local operators with other stakeholders (e.g. Cycling Federation), with ATA being the focal point as the region's marketing body. This presents an opportunity to capitalise on the region's outstanding landscape and heritage.
- Promote cycling and walking in the Algarve in specialist magazines such as Wander Magazin and other similar publications as part of a coordinated targeted campaign (action 26.05).
- Identify and promote opportunities for local walking and cycle routes in close proximity to popular visitor hubs to maximise the opportunity presented by the sun and sea market (action 26.06). This might also help to position the Algarve as an activity destination. For example this might include the upgrading of the walking route between Lagos and Praia do Pinhão (action 11.01); and the provision of a greenway between Faro city centre and Praia do Faro (action 05.01).



- Develop bundled offers or packages for cycling and walking for sale online (action 26.07). This includes on businesses own websites or through travel agents to link product offers with accommodation and transport and provide market ready packages.
- Promote the rebranded Ecovia do Algarve, in tandem with the launch of the first phase of the route (action 26.08, and see 04.01 above) and as the start or end section of Eurovelo route 1 and 8 (action 26.09).
- Promote the Ecovia do Algarve route as a greenway for walking as well as a cycle route (action 26.10, see also actions 08.01 and 16.07 above to reduce user conflict issues)
- Reinforce partnerships to promote increased awareness of the cycling and walking product offer in the Algarve (actions 26.11 to 26.14). This includes trade association in destination markets, tour operators, journalists and travel guide writers such as those for Lonely Planet. The key issues with journalists is to ensure they have the best possible experience of cycling and walking in the Algarve through avoiding fam trips in June, July and August, only taking them to market ready trails; not giving them too rushed an itinerary and ensuring they are placed with journalists from countries that speak the same language.
- Capitalise on the opportunity of the coastal rail line in the Algarve (action 26.15). This includes by placing advertising using motivational imagery in train stations along the route to promote the Algarve as an adventure destination.
- Introduce route passports for the main regional routes in the Algarve (action 26.16). This seeks to build on existing and proposed initiatives but with sector specific stamps, using the same model as the Caminho de Santiago, so that visitors who have not completed the whole route on one visit are encouraged to return on another visit to complete their passport for the route.
- Set up a team of highly experienced local cyclists and walkers to act as ambassadors to help promote cycling and walking in the Algarve in domestic and overseas markets e.g. cyclist Frank Schleck. (action 26.17)



## WEBSITE: THE KEY MARKETING AND PROMOTIONAL TOOL

### Strategy:

Create world class digital media platform to provide visitors with clear information about cycling and walking opportunities and the associated facilities and services in the Algarve. Integrate this hub website with other digital media, social media, maps and mobile applications. Utilise a cascade approach, as is used in other destinations, with broad information on adventure tourism provided on an upgraded [www.visitalgarve.pt](http://www.visitalgarve.pt) website, which acts as a portal to a dedicated stand-alone walking and cycling website for the Algarve which is capable of being upgraded in a second phase to a booking platform.

### Recommendation:

Strengthen the [www.visitalgarve.pt](http://www.visitalgarve.pt) website through the inclusion of pages featuring the broad adventure tourism product offer in the Algarve. Provide links on the upgraded [www.visitalgarve.pt](http://www.visitalgarve.pt) site to a standalone Algarve trails website which features different routes and trail networks in detail, providing interactive access with top quality audio visual content enabling viewers to "test" ride/walk the routes and trails.

To support the Algarve trails website, develop a regional cycling and walking trails map; a regional adventure tourism social media strategy; apps for the regional routes; and use video media including drone footage to promote cycling and walking in the Algarve. Provide links to existing websites for specific trails where significant work has taken place to develop these, for example the [www.pt.rotavicentina.com](http://www.pt.rotavicentina.com) website.

### Action Rationale

- Develop specific pages for product information on walking cycling and other adventure activities as part of an upgraded website for the [www.visitalgarve.pt](http://www.visitalgarve.pt) website (action 27.01). This follows the approach adopted by destinations such as Switzerland and provides broad information to visitors who wish to find out about activities in the Algarve. Those who wish to find out more about specific walking and cycling trails can then proceed to a dedicated Algarve trails website.
- Develop a fully integrated stand-alone digital platform for walking and cycling using a similar model to [www.wanderland.ch](http://www.wanderland.ch) (action 27.02). It is recommended that this website be produced by as the result of a tender process by a professional specialist company. Some key points are that:
  - The website must be responsive i.e. work well on mobile or tablet. This will increase the price due to testing but will result in increased customer satisfaction and usability.

The website will be the key marketing and promotional tool. It will be a world class digital media platform

- This hub site will be informative in phase 1 and transactional in the second phase with opportunities for visitors to book accommodation, transport and activities directly. The website will provide a platform for companies to promote their services
  - The site must be flexible, i.e. offering excellent user experience, scores highly for search engine optimisation and simple to update for content editors
  - The data layer must be directly linked to the AMAL GIS system to enable updating by municipal councils. This layer will also enable data for bike hire, accommodation product offer and street view.
  - Train and bus timetables provided in relation to each trail must be connected to online timetables for that service to ensure up to date information. This could also include an associated mobile app.
  - Only those trails or sections of regional cycling and walking routes which have been approved and classified by the proposed AATDA, including new trails developed by FCP for Turismo do Algarve, are to be included on this website to ensure trails promoted by ATA/Turismo do Algarve are of internationally comparative quality.
  - For the Ecovia do Algarve this is also about managing visitor expectations and is linked to action 27.03 to define the current optimum route to avoid the N125 and other busy areas which can be downloaded via GPS from this website.
- [Develop an overall cycling and walking visitor map for the Algarve; and specific maps for the Ecovia do Algarve route and the Grande Rota do Guadiana route \(action 27.04\)](#). An overall map of cycling and walking trail opportunities for the Algarve is considered to be essential given the current lack of information on the overall and comparative product offer. The map for the Ecovia do Algarve should be produced to coincide with the launch of Phase 1 with the whole route indicated with but indicating that only phase 1 is currently developed. This map would be updated in tandem with the launch of new sections of the route.
  - [Commission an external digital media company to manage the social media strategy for the Algarve \(action 27.05\)](#). This is linked to action 27.06 to develop short motivational videos of cycling and walking in the Algarve. This type of media can also be embedded in websites, used in trade fairs and could be used in visitor hubs such as Faro Airport. Use of innovative media such as media footage would capitalise on the unique landscape of the Algarve.
  - [Develop mobile apps for regional trails in the Algarve \(action 27.07\)](#). This will respond to product gaps identified by trail managers and will provide visitor with enhanced information.
  - [Ensure relevant information regarding the Ecovia do Algarve is included on the Eurovelo website \(action 27.08\)](#). This content to be updated in tandem with route development progress.

## EVENTS AND FESTIVALS

### Strategy:

Use events and festivals to increase awareness of the Algarve as cycling and walking destination; attracting more walkers and cyclists, and positioning the Algarve as an activity destination.

### Recommendation:

Development and promote events and festivals associated with cycling and walking to raise domestic and international awareness of the Algarve as a cycling and walking activity destination including an annual Algarve Walking Festival; an annual Algarve Adventure Tourism Conference; coverage of events such as the Volta do Algarve cycle race; a feasibility study regarding a new or expanded road cycle race to rival the Mallorca 312; an Algarve MTB Championship; an Ecovia do Algarve Marathon; ultra-trail events; and an Algarve Events webpage as part of the regional hub website.

### Action Rationale

- Continue the proposed Algarve Walking Festival to be commenced in 2016 as an annual event at the beginning of the walking season (action 28.01). This recurrent event will aim to indicate the full range of trails in the Algarve that are 'open for walking' with multiple activities in several locations.
- Establish an annual Algarve Adventure Tourism Conference (action 28.02). This envisages an event which brings the key stakeholders together and showcases the best that the Algarve has to offer as well as providing examples of international best practice including hiking, cycling, water-sports and land-sports such as climbing. This encourages networking, learning from best practice and positions the Algarve as an adventure destination. This is intentionally focussed towards adventure activity rather than nature tourism.
- Aim to attract the Adventure Travel Trade Association annual conference in 2020 (action 28.03). Attracting this event, the world's largest adventure activity conference, to the Algarve would help to significantly raise the profile of the Algarve as an adventure destination and could be an opportunity to showcase the cycling and walking product to a worldwide trade audience. A 5-year timescale would enable sufficient time to significantly enhance the product offer. The 2014 event was held in Killarney in Ireland with over 800 attending.



- Prepare a coherent and integrated media plan in relation to the promotion of cycling events in the Algarve including evaluation of the most beneficial media channels given specific objectives regarding international promotion (action 28.04). For example evaluation of annual Eurosport coverage of Volta do Algarve which provides aerial video footage of Algarve scenery in key markets as well as helping to position Algarve as a professional cycling destination.
- Develop and promote existing cycling events and consider a new world class cycling event to rival the popular Mallorca 312 race (action 28.05). This aims to attract more professional cycling teams to the Algarve and to position the Algarve as a professional cycling destination.
- Develop an Algarve MTB Championship event once a new BTT centre has been established (action 28.06). This aims to position the Algarve as a world class mountain biking destination. Ballyhoura in Ireland held the Red Bull 2014 European Marathon MTB Championship event last year which attracted significant media attention.
- Develop an Algarve events webpage as part of the Algarve walking and cycling website (action 28.07). This action aims to encourage greater attendance at all events through increasing the ease of online booking including links to accommodation. For example cycling events need to be promoted one year in advance to attract international teams. This events page will also highlight international events promoted by the Portuguese Cycling Federation and include links to their strategies for sports training.
- Promote running events on the route of the Ecovia do Algarve and in other suitable locations (action 28.08) and develop an Algarve Ultra-trail event with separate events in multiple locations. This aims to raise awareness and to promote use for multiple activities.

### 3. Action Plan

The following action plan is grouped under 7 themes with 28 programme areas containing 135 actions as shown below in Figure 10. Specific actions are identified for each programme area, identifying lead agency and partners, timeline for completing the action (maximum five years to 2020), and key performance indicators. Indicative programme costs are shown in Section 4.

**Figure 10: Action Plan Themes and Programme Areas**

Theme	Programme Area
<b>Organisation and Management</b>	1: Create Strategic Leadership Organisation - AATDA 2: Trail Management 3: Stakeholder Coordination
<b>Product Development – Cycling</b>	4: Ecovia Flagship Attraction 5: Looped Local Cycling Routes and Greenways 6: Mountain-Biking 7: Supporting Measures – Cycling
<b>Product Development – Walking</b>	8: Ecovia do Algarve 9: Enhance Rota Vicentina, Via Algarviana, Grande Rota do Guadiana 10: Local Walking Routes 11: Visitor Safety 12: Supporting Measures – Walking
<b>Product Enablers and Quality Management</b>	13: Improve Visitor Access 14: Capacity Building 15: Data Collection and Visitor Monitoring 16. Standardisation 17: Sustainable Development
<b>Accommodation Diversification and Development</b>	18: Familiarisation & Training 19: Facility Upgrade 20: Rural Tourism Accommodation
<b>Access</b>	21: Enabling Better Access
<b>Sales Development and Marketing Communications</b>	<u>2016 Sales Development Plan</u> 22: Algarve Cycling and Walking Roadshow 23: Communications and Awareness Development 24: Business to Business (B2B) & Business to Consumer (B2C) 25: Algarve Walking Festival <u>2016-2018 Market Awareness Development Plan</u> 26: Market Awareness of Algarve Cycling and Walking 27: Website: the Key Marketing and Promotional Tool 28: Events and Festivals

Preceding the detailed action plan, section 3.1 identifies the plan's priority actions. These 'quick win' actions will:

- Kick start the process of enhancing the cycling and walking product;
- Increase visitor numbers and reduce seasonality;
- Create momentum, acting as a catalyst to drive further investment and engagement.

## 3.1 Prioritised Actions

### Organisation and Management

- 01.01 Commission a business organisation plan for the Algarve Adventure Tourism Development Association (AATDA).
- 01.02 Establish Algarve Adventure Tourism Development Association (AATDA).
- 01.05 Recruit AATDA figurehead (Director).

### Product Development

- 04.01 Upgrade Phase 1 of Ecovia do Algarve (70km: Vila Real de Santo António to Bias do Sul near Olhão) to market ready Eurovelo standard with additional signage, some trail resurfacing and route segregation.
- 05.01 Construct Greenway between Faro city centre (route of Ecovia do Algarve, harbour & train station) and Praia de Faro via the Parque Ribeirinho de Faro and the eastern perimeter of Faro Airport including upgrade of bridge to include cycle lanes.
- 07.01 Provide storage facilities for bikes at Faro Airport.
- 07.02 Investigate opportunity for provision of bike hire concession at Faro Airport.
- 09.01 Extend Rota Vicentina trails to Lagos.
- 11.01 Review all local walking routes in terms of visitor safety and temporarily close those which do not meet acceptable standards using barriers and clear signage. A priority is the coastal walking route between Lagos city and Praia do Pinhão.
- 12.01 Develop Faro Heritage Trail as a pilot initiative as part of Algarve Heritage Trails programme.
- 13.01 Provide information on public transport connections on cycling and walking website for the Algarve including connection to timetables.
- 13.03 Provide bus service between Faro Airport and Faro rail station integrated with train departure time with bike carrier.
- 13.10 Investigate optimum means of provision of a one way baggage transfer service between destinations & accommodation for walkers and cyclists.



## Accommodation Diversification and Development

- 18.01 Organise a series of international familiarisation visits to visit examples of best practice in provision of facilities for walkers and cyclists.
- 18.02 Organise familiarisation visits to cycling and walking trails and examples of local best practice in provision of facilities for walkers and cyclists for hotel reception staff.
- 18.03 Provide a training programme for best practice in providing services for cycling and walking tourists such as catering and storage.
- 19.01 Prepare guidelines for accommodation sector in relation to the provision of cycling and walking facilities and require accommodation providers to meet a minimum standard and to be promoted on regional trails website (27.02).

## Access

- 21.01 Negotiate with airlines to increase year-round flight schedule.
- 21.02 Continue the trend of reduce winter airport charge for airlines.

## Sales Development and Marketing Communications

- 22.01 Establish a multi-component sales and development mission programme to main European markets in the first half of 2016.
- 22.02 Immediate formation of a sales and marketing team to take part at all trade and consumer travel shows and fairs in Europe, as well as at the specialist cycling and walking events, in the first, third and final quarters of 2016.
- 22.03 Organise an immediate programme of travel trade and media familiarisation visits to the Algarve (during the first and third quarters of 2016) to inspect cycling routes and walking trails, hosted by local accommodation and cycling and walking operators.
- 24.03 Hosting and support for overseas trade inspection visits.
- 25.01 Establish Algarve Walking Festival in October.
- 26.04 Promote adventure tourism in the Algarve through use of large images and video at Faro Airport and on [www.faro-airport.com](http://www.faro-airport.com) website.
- 26.12 Reinforce partnerships with specialist international tour operators for cycling and walking.
- 26.13 Ensure a more focussed approach to overseas journalist's familiarisation visits to gain better international coverage.
- 26.14 Engage with travel writers including Lonely Planet to ensure favourable coverage of cycling and walking in the Algarve.

- 26.17 Identify local ambassadors to help promote cycling and walking in the Algarve in domestic and overseas markets.
- 27.01 Produce webpages for adventure tourism in the Algarve as part of an upgraded [www.visitalgarve.pt](http://www.visitalgarve.pt) content.
- 27.02 Commission and manage website for walking, cycling and mountain-biking trails in the Algarve. GIS data to be linked to the AMAL GIS database and associated app. Second phase to include to include detailed information on bookable offers including accommodation, activities, bundles and transport, accommodation, transport, attractions.



## 3.2 Organisation and Management

### 3.2.1 Programme 1: Create Strategic Leadership Organisation

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
01.01	Prepare (commission) a business organisation plan for the Algarve Adventure Tourism Association (AATDA)	Turismo de Algarve, AMAL	ANA (facilitation)	Q1-2 2016	Business model identified for AATDA
01.02	Establish Algarve Adventure Tourism Development Association (AATDA)	ANA (Facilitation), Turismo de Portugal	Turismo de Algarve, AMAL	Q1-2 2016	AATDA established
01.03	Establish AATDA Monitoring Technical Committee	TP, ANA, ERTA, ATA AATDA		Q1-2 2016	AATDA Monitoring Technical Committee established
01.04	Confirm priority actions for 2016	AATDA Monitoring Technical Committee		Q1-2 2016	Priority action list confirmed
01.05	Recruitment of a person extensively experienced in activity tourism and widely respected both within the Algarve and in international markets to act as the figurehead for the development and marketing initiatives in support of cycling and walking tourism.	AATDA Monitoring Technical Committee		Q1-2 2016	Figurehead personality identified
01.06	Establish an AATDA Advisory Committee to inform decision-making with elected chairperson to help drive the implementation of adventure tourism in the Algarve	AATDA	Turismo do Algarve, AMAL, ICNF, activity companies, tour operators, the accommodation sector (e.g. AHETA, AISHA), NGO's such as ATA, Rota Vicentina Association, Odiana Association, Almargem, In Loco	Q1-2 2016	AATDA Advisory Committee established
01.07	Review marketing budgets	Turismo do Portugal Turismo do Algarve ATA		Q1-2 2016	Marketing budget reviewed with increased budget for adventure tourism

## 3.2.2 Programme 2: Trail Management

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
<b>Ecovia do Algarve</b>				
02.01	Identify funding sources for capital and operating finance for Ecovia do Algarve for a 5-year period	AATDA	CCDR Vila Real de Santo António, Castro Marim, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Portimao, Lagos, and Vila do Bispo Municipal Councils (and Aljezur, Alcoutim and Castro Marim Municipal Councils when route is extended)	Q1-3 2016 Source identified for operating capital for Ecovia do Algarve for 3-year period
02.02	Review maintenance model of Ecovia do Algarve annually and recommend maintenance to be tendered under collaborative public-private partnership model unless minimum maintenance standards are reached	AATDA	Vila Real de Santo António, Castro Marim, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Portimao, Lagos, and Vila do Bispo Municipal Councils (and Aljezur, Alcoutim and Castro Marim Municipal Councils when route is extended)	2016-2020 Ecovia do Algarve trail maintained at Eurovelo standard

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
<b>Via Algarviana</b>					
<b>02.03</b>	Identify funding sources for Via Algarviana for 5-year period	AATDA	Almargem, Alcoutim, Tavira, Sao Bras do Alportel, Loulé, Silves, Monchique, Portimao, Aljezur, Lagos, and Vila do Bispo Municipal Councils	Q1-3 2016	5-year funding programme for Via Algarviana Association agreed
<b>Odiana Association</b>					
<b>02.04</b>	Identify funding sources to manage and promote Grande Rota do Guadiana routes	AATDA	Odiana Association (Alcoutim, Castro Marim and Vila Real de Santo António Municipal Councils)	2017-2018	Annual maintenance budget ring-fenced
<b>Rota Vicentina Association</b>					
<b>02.05</b>	Identify multi-annual funding plan to maintain the Rota Vicentina	AATDA Rota Vicentina Association	Vila do Bispo and Aljezur Municipal Councils	2016-2017	Annual maintenance budget ring-fenced

## 3.2.3 Programme 3: Stakeholder Coordination

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
03.01	Issue bi-annual progress newsletter to relevant Mayors	AATDA		2016-2020	Newsletter issued to Mayors
03.02	Sign annual contracts with Mayors of relevant councils at a public event	AATDA	Mayors of Municipal Councils	2016-2020	Annual contracts signed
03.03	Negotiate with landowners to increase proportion of off-road Ecovia route	Mayors of Olhão Municipal Council, Faro, Loulé, Albufeira, Silves, Lagoa, Portimao, Lagos, and Vila do Bispo Municipal Councils	AATDA	2016-2020	Proportion of Ecovia do Algarve route off-road increased
03.04	Negotiate with Comboios de Portugal for development of new greenway bridge between Lagoa and Portimao to enable Ecovia do Algarve to avoid N125	AATDA	Infraestruturas de Portugal	2016-2018	New greenway bridge in place
03.05	Collaborate with the European Cycling Federation and the National Eurovelo Coordinator for the reformulation of the Eurovelo network to re-route Eurovelo 1 down the west coast to Cape St Vincent	Portuguese Cycling Federation (FPCUB)	AATDA	2018-2020+	Eurovelo 1 reformulated to run down Portugal's west coast
03.06	Produce Volunteer Management Plan for regional trails based on Rota Vicentina volunteer programme including trail sponsorship model	AATDA	Almargem Odiana Association	2016-2017	Plans produced and volunteer hours increased



### 3.3 Product Development - Cycling

#### 3.3.1 Programme 4: Ecovia Flagship Attraction

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
<b>04.01</b> <b>Upgrade Phase 1 of Ecovia do Algarve</b> (70km: Vila Real de Santo António to Bias do Sul near Olhão) to market ready Eurovelo standard with additional signage, some trail resurfacing and route segregation	AATDA	Vila Real de Santo Antonio Municipal Council, Castro Marim Municipal Council, Tavira Municipal Council, Olhão Municipal Council	Q1-3 2016	Phase 1 of Ecovia do Algarve market ready
<b>04.02</b> <b>Progressively develop market-ready sections of the Ecovia do Algarve</b> to standards issued by Ecovia do Algarve Association through completion for prioritised funding from Alcoutim to Odeceixe  Sections A Bias do Sul (east of Olhão) to Albufeira B Albufeira to Portimao C Portimao to Sagres D Sagres to Odeceixe E Odeceixe to Santiago do Cacém F Vila Real de Santo Antonio-Alcoutim G Alcoutim-Mertola	A: Olhão, Faro, Loulé, and Albufeira Municipal Councils B: Albufeira Municipal Council, Silves, Lagoa, and Portimao Municipal Councils C: Portimao, Lagos, and Vila do Bispo Municipal Councils D: Vila do Bispo and Aljezur Municipal Councils E: Aljezur, Odemira, Sines and Santiago do Cacém Municipal Councils F: VR de Santo Antonio, Castro Marim, Alcoutim Municipal Councils G: Alcoutim and Mertola Municipal Councils	AATDA  Rota Vicentina Association  Almargem  Odiana Association	2017-2020	All sections of Ecovia do Algarve complete

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
04.03	Investigate opportunity to link Ecovia do Algarve from Alcoutim to Odeceixe and implement if feasible	AATDA	Rota Vicentina Association Almargem	2018-2020	Opportunity to link Odeceixe and Alcoutim assessed and implemented if feasible
04.04	Develop Eurovelo 1 from Cape St Vincent to Lisbon to northern border with Spain	Portuguese Cycling Federation (FPCUB)	Turismo de Portugal, Regional Tourism Entities and Municipalities	2018-2020+	Eurovelo 1 implemented along western Portuguese coast

### 3.3.2 Programme 5: Looped Local Cycling Routes and Greenways

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
05.01	Construct Greenway between Faro city centre (route of Ecovia do Algarve, harbour & train station) and Praia de Faro via the Parque Ribeirinho de Faro and the eastern perimeter of Faro Airport including upgrade of bridge to include cycle lanes	Faro Municipal Council	AATDA	Q1-3 2016	Greenway constructed between Faro city centre and Praia do Faro along perimeter of airport Off-road cycle route created between Faro Airport and train station
05.02	Develop five local looped cycle routes from overnight hubs along the Rota Vicentina using maps and GPS e.g. Aljezur-Monchique-Aljezur	Rota Vicentina Association	AATDA Vila do Bispo and Aljezur Municipal Councils Federação Portuguesa de Ciclismo (Technical support)	2016	Looped cycle routes developed on Rota Vicentina
05.03	Construct Greenway between Sagres Fort and Cape St Vincent lighthouse (could also include joint ticketing)	Vila de Bispo Municipal Council	Direcção Regional da Cultura, Autoridade Marítima Nacional	Q1-3 2016	Greenway constructed between Sagres Fort and Cape St Vincent
05.04	Support development of a network of road-cycling routes within the Algarve	AATDA	Federação Portuguesa de Ciclismo (FPC)	Until 2017-2018	Network of road-cycling routes developed and promoted

## 3.3.3 Programme 6: Mountain Biking

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
06.01	Extend Grande Rota do Guadiana walking & mountain-biking route to the north into Alentejo along the Rio Guadiana to Mertola	AATDA	<p>Odiana Association</p> <p>Technical partner - Portuguese Cycling Federation (FPCUB) for mountain-bike route</p> <p>Municipalities of Alcoutim and Mértola, with the participation in terms of promoting and communication</p>	<p>Until 2017-2018</p> <p>Grande Rota do Guadiana extended from Alcoutim to Mertola</p>
06.02	Upgrade surfacing on Via Algarviana between Alcoutim to Monchique on a phased basis to provide a mountain-biking route with an easy-intermediate grading	AATDA	<p>Almargem</p> <p>Federação Portuguesa de Ciclismo</p> <p>Private sector sponsor and supporters</p>	<p>2016-2017</p> <p>Trail surface upgraded</p>
06.03	Contribute funding to development of an Algarve regional BTT centre (potential locations include Tavira, Monchique and Loulé)	<p>Relevant Municipal Council</p> <p>Federação Portuguesa de Ciclismo</p>	<p>2016</p>	<p>Financial support for development of BTT centre in the Algarve</p>

## 3.3.4 Programme 7: Supporting Measures - Cycling

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
07.01	Provide storage facilities for bikes at Faro Airport	ANA		Q1-3 2016	Storage facilities for bikes installed at Faro Airport
07.02	Investigate opportunity for provision of bike hire concession at Faro Airport	ANA	Private bike hire operator	Q1-3 2016	Bike hire available at Faro Airport
07.03	Investigate opportunities for provision of public electric bike hire at key coastal cities, towns and resorts	Vila Real de Santo António, Castro Marim, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Portimao, Lagos, and Vila do Bispo Municipal Councils	AATDA CCDR (to be confirmed)	2016-2017	Public bike hire available at coastal cities and resorts
07.04	Develop Blueways for kayaking along the Rio Guadiana and within the Ria Formosa Blueway to offer a complementary product to cycling/walking route	Municipalities of Mértola, Alcoutim, Adventure Tourism Unit (Turismo do Algarve), and private sector  ICNF	AATDA  Odiana Association	2017	Blueways for kayaking developed along Rio Guadiana and Ria Formosa

## 3.4 Product Development: Walking

### 3.4.1 Programme 8: Ecovia do Algarve

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
<b>08.01</b> Identify sections of Ecovia do Algarve route between Vila Real de Santo António and Cape St Vincent where intervention is required to enable shared use by pedestrians and cyclists, e.g. indication of shared surface at pinch points through paint marking and signage	AATDA	Vila Real de Santo António, Castro Marim, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Portimao, Lagos, and Vila do Bispo Municipal Councils	2016-2020	Required interventions to indicate shared greenway identified and implemented

### 3.4.2 Programme 9: Enhance Rota Vicentina, Via Algarviana, Grande Rota do Guadiana

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
<b>09.01</b> Extend Rota Vicentina trails to Lagos	Rota Vicentina Association	Vila do Bispo and Lagos Municipal Councils Turismo do Portugal	Q1-3 2016	Rota Vicentina extended from Cape St Vincent to Lagos
<b>09.02</b> Extend Fisherman's Trail from Odeceixe to Cape St Vincent through extension of existing loops	Rota Vicentina Association	AATDA	2016-2017	Length of Fisherman's Trail extended
<b>09.03</b> Develop 4 looped walks at overnight visitor hubs on Rota Vicentina (2 near Bordeira + 1 Vila do Bispo / Odeceixe + 1 Aljezur)	Rota Vicentina Association	AATDA	2016-2017	Looped walks developed along Rota Vicentina
<b>09.04</b> Extend Grande Rota do Guadiana walking & mountain-biking route to the north into Alentejo along the Rio Guadiana to Mertola (see also 06.01)	Odiana Association	Mertola Municipal Council	2016-2017	Grande Rota do Guadiana extended
<b>09.05</b> Provide essential directional signage along the route of the Via Algarviana, Rota Vicentina and Grande Rota do Guadiana and annual maintenance	AATDA	Almargem Rota Vicentina Association Odiana Association	2016-2017	Directional signage and maintenance provided

### 3.4.3 Programme 10: Local Walking Routes

	Action	Lead Agency	Partners	Timescale	Key Performance Indicator
10.01	Develop a safe coastal walking route between Lagos and Burgau	Lagos Municipal Council	AATDA Rota Vicentina Association	Q1-3 2016	Safe coastal walking route created between Lagos ad Burgau
10.02	Develop a safe coastal walking route between Salema and Sagres	Vila de Bispo Municipal Council	AATDA Rota Vicentina Association	2016-2017	Safe Coastal walking route created between Salema and Sagres
10.03	Identify opportunities for 5 short (1-2 hour) walks near coastal hubs	Vila Real de Santo António, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Portimao, Lagos, Vila do Bispo  Aljezur Municipal Councils	AATDA	2016-2017	Increased local walking opportunities

### 3.4.4 Programme 11: Visitor Safety

	Action	Lead Agency	Partners	Timescale	Key Performance Indicator
11.01	Review all local walking routes in terms of visitor safety and temporarily close those which do not meet acceptable standards using barriers and clear signage. A priority is the coastal walking route between Lagos city and Praia do Pinhão.	Alcoutim, Castro Marim, Vila Real de Santo António, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Monchique, Sao Bras de Alportel, Portimao, Lagos, Vila do Bispo, Aljezur Municipal Councils	AATDA	Q1-3 2016	All local walking routes provide safe experiences and meet required standards



### 3.4.5 Programme 12: Supporting Measures - Walking

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
12.01	Develop Faro Heritage Trail as a pilot initiative as part of Algarve Heritage Trails programme	Faro Municipal Council	AATDA	Q1-3 2016	Faro Heritage Trail open
12.02	Develop further Heritage Trails as part of Algarve Heritage Trails programme for example at Vila Real de Santo Antonio, Tavira, Alcoutim, Loulé, Lagos, Silves, Portimao and Olhao	Vila Real de Santo Antonio, Tavira, Alcoutim, Loulé, Lagos, Silves, Portimao and Olhao Municipal Councils	AATDA	2016-2017	Range of urban heritage trails open
12.03	Identify existing or potential multi access trail sections on each regional linear walk and increase quality of trail surface to multi-access quality  (See also 13.09 regarding access for all programme)	AATDA	Rota Vicentina Association  Odiana Association  Almargem	2016	Multi access routes identified and promoted

## 3.5 Product Enablers and Quality Management

### 3.5.1 Programme 13: Improve Visitor Access

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
13.01	Provide information on public transport connections on cycling and walking website for the Algarve including connection to timetables	AATDA	EVA	Q1-3 2016	Information on public transport live
13.02	Develop and promote Algarve Mountain Touring Routes (East and West) to an agreed standard	AATDA	Alcoutim, Castro Marim, Tavira, Olhão, Faro, Loulé, Silves, Lagoa, Monchique, Sao Bras de Alportel, Portimao, Lagos, Aljezur Municipal Councils	2017-2018	Algarve Mountain Touring Routes signposted and promoted
13.03	Provide bus service between Faro Airport and Faro rail station integrated with train departure time with bike carrier	EVA/ANA	Portugal EP (former REFER)	Q1-3 2016	Bus service between Faro Airport and Faro train station available
13.04	Map destination hubs on walking routes and develop public transport model based on connectivity between accommodation hubs	EVA	AATDA	2016-2020	Public transport connections available between route hubs
13.05	Extend opening hours for all tourist information offices to 9am to 6pm	Turismo do Algarve		2016	Opening hours extended
13.06	Extend opening hours of all interpretative centres to 9am to 6pm	ICNF		2016	Opening hours extended

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
13.07	Introduce Algarve Open for Business campaign	Turismo do Algarve	AHETA, ATA	2016-2017	Algarve Open for Business campaign underway
13.08	Introduce Open Access Algarve programme	Turismo do Algarve	AMAL	2016-2017	Algarve Open Access cards available
13.09	Provide information on multi-access trails as part of Access for All programme in the Algarve	AATDA	CP EVA	2017-2020	Multi access trails can be easily identified
13.10	Investigate optimum means of provision of a one way baggage transfer service between destinations & accommodation for walkers and cyclists.	AATDA	Rota Vicentina Association Odiana Association Almargem	Q1-3 2016	One way baggage and bike transfer service available

### 3.5.2 Programme 14: Capacity Building

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
14.01	Replicate Faro Municipal Council private sector training model in other councils	Alcoutim, Castro Marim, Vila Real de Santo António, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Monchique, Sao Bras de Alportel, Portimao, Lagos, Vila do Bispo, Aljezur Municipal Councils	Faro MC	2016-2018	Private sector training taking place in all councils
14.02	Turismo do Algarve website to identify key walking and cycling opportunities and host a 'How to set up a small business' guide	Turismo do Algarve	Faro MC	2016	Turismo do Algarve website hosts 'How to Set up a Small Business' guide

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
14.03	Turismo do Algarve	Rota Vicentina Association Almargem Odiana Association	2016-2020	Tourist information office staff more aware of opportunities
14.04	AATDA	Mayors of Municipal Councils	2017-2018	Friendly Communities Programme underway
14.05	AATDA	Rota Vicentina Association Almargem Odiana Association	2017-2020	Training programme available for local guides
14.06	AATDA Rota Vicentina Association	Alcoutim, Castro Marim, Vila Real de Santo António, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Monchique, Sao Bras de Alportel, Portimao, Lagos, Vila do Bispo, Aljezur Municipal Councils Sair da Casca	2016	Rota Vicentina schools pilot programme underway

### 3.5.3 Programme 15: Data Collection and Visitor Monitoring

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
15.01	ANA	Turismo do Portugal	2016-2020	Annual exit survey begun
15.02	AATDA	Rota Vicentina Association, Almargem Odiana Association	Q1-3 2016	Visitor monitoring strategies prepared and implemented

## 3.5.4 Programme 16: Standardisation

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
16.01	Commission road signage strategy and implement	AMAL	Alcoutim, Castro Marim, Vila Real de Santo António, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Monchique, Sao Bras de Alportel, Portimao, Lagos, Vila do Bispo, Aljezur Municipal Councils	2016-2017	Road signage improved
16.02	Commission trail signage strategy for cycling and walking trails	AATDA	Federação Portuguesa de Ciclismo Federação de Campismo e Montanhismo de Portugal, Rota Vicentina Association, Almargem, Odiana Association	2016	Trail signage is of international comparative quality
16.03	Implement a trail classification system for all existing and new cycle routes which are to be inspected and meet National Cycling Plan minimum standards and be certified by Federação Portuguesa de Ciclismo <sup>2</sup>	AATDA	Alcoutim, Castro Marim, Vila Real de Santo António, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Monchique, Sao Bras de Alportel, Portimao, Lagos, Vila do Bispo, Aljezur Municipal Councils Federação Portuguesa de Ciclismo (certification)	2016-2020	All cycling trails inspected and meet required standard
16.04	Identify and implement a common trail classification system for all existing and new walking trails which are to be inspected and to meet minimum trail standards with each trail graded for use e.g. easy, medium, difficult, multi-access	AATDA	Federação de Campismo e Montanhismo de Portugal, Rota Vicentina Association, Almargem, Odiana Association	2016-2020	All walking trails inspected and meet required standard

<sup>2</sup> See also action 27.02 regarding the development of a regional walking and trails website which indicates that only those trails that meet a minimum standard for signage and which have been classified according to established trail classification standards should be promoted on this website.

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
16.05	Phased development of the Ecovia do Algarve to meet Eurovelo standard	Vila Real de Santo António, Castro Marim, Tavira, Olhão, Faro, Loulé, Albufeira, Silves, Lagoa, Portimao, Lagos, and Vila do Bispo Municipal Councils (and Aljezur, Alcoutim and Castro Marim Municipal Councils when route is extended)	AATDA	2016-2020	Ecovia do Algarve meets Eurovelo standard
16.06	Develop new signage standard for Ecovia do Algarve and implement on phased basis	AATDA		2016-2020	Standardised signage for Ecovia do Algarve
16.07	Code of Conduct developed by Federação Portuguesa de Ciclismo to be used on website, maps and guides	AATDA		2016-2020	Code of Conduct utilised
16.08	Develop training and certification programme to ensure high quality guiding services	Turismo do Algarve	Rota Vicentina Association, Almargem, Odiana Association	2016-2017	All interpretative guides are qualified
16.09	Withdraw current 'Walking in the Algarve' publication from sale	Turismo do Algarve		2016	Publication withdrawn
16.10	Ensure standardised & consistent approach to information provision in tourist information offices	Turismo do Algarve		2016+	Consistent information provision in tourist information offices



## 3.5.5 Programme 17: Sustainable Development

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
17.01	Prepare Eurovelo standard inter-urban greenway proposals for south coast (Ecovia do Algarve) for inclusion in mobility plans for east, west and central Algarve	AMAL	European Cycling Federation	2016-2017	Ecovia proposals included in Algarve Mobility Plans
17.02	Identify achievable cycling and walking product upgrades that could be included for funding in the forthcoming Ria Formosa strategy	AATDA		2017-2018	Cycling and walking proposals included in Ria Formosa strategy
17.03	Include Faro Heritage Walking Trail (12.01) and Faro Centre-Praia do Faro Cycle Route (05.01) in current Faro marketing and tourism plan	Faro Municipal Council	ANA	2016	Faro Historic Town Walking Trail and Faro Centre-Praia do Faro Cycle Route included in Faro marketing and tourism plan
17.04	Focus investment for accommodation, signage and local trails on key overnight hubs on regional trails	AATDA	Rota Vicentina Association, Almargem, Odiana Association	2016-2020	Investment prioritised at overnight trail hubs on regional trails
17.05	Stop any future inappropriate intensive agricultural development within the Parque Natural Sudoeste Alentejano e Costa Vicentina through increased support for ICNF and zoned approach to development	AATDA	Vila do Bispo and Aljezur Municipal Councils Rota Vicentina Association	2016-2020	Increased support for ICNF  Zoning approach taken to coastal areas i.e. 'Open to Consideration' or Not open to Consideration'.

## 3.6 Accommodation Diversification and Development

### 3.6.1 Programme 18: Familiarisation & Training

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
18.01	Turismo do Algarve	AHETA Interested businesses	Q1-3 2016	International fam visits underway
18.02	Turismo do Algarve	AHETA Rota Vicentina Association Almargem Odiana Association	Q1-3 2016	Local fam visits underway
18.03	Turismo do Algarve	AHETA	Q1-3 2016	Training programme delivered

### 3.6.2 Programme 19: Facility Upgrade

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
19.01	AATDA	AHETA ATA AISHA	Q1-3 2016	Guidelines prepared and issued
19.02	AATDA	Turismo do Algarve	2016-2018	Expansion of the Bikotel scheme in the Algarve and new Walkers Friendly Hotels certification scheme operational if deemed of importance by AATDA
19.03	AHETA	AATDA Private bike hire operator	2016-2017	Increased opportunities for bike hire at accommodation

### 3.6.3 Programme 20: Rural Tourism Accommodation

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
20.01	AATDA	CCDR	Q1-3 2016	Increased rural accommodation offer

## 3.7 Access

### 3.7.1 Programme 21: Enabling Better Access

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
21.01	Negotiate with airlines to increase year-round flight schedule	ANA	ATA	Q1-3 2016	Increased winter flights between the Algarve and key source markets
21.02	Continue the trend of reduce winter airport charge for airlines	ANA	ATA	Q1-3 2016	Winter airport charges reduced

## 3.8 Sales Development and Marketing Communications

### 2016 Sales Development Plan

#### 3.8.1 Programme 22: Algarve Cycling and Walking Roadshow in Main Markets

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
<b>22.01</b> Establish a multi-component sales and development mission programme to main European markets in the first half of 2016	ATA	Local cycling and walking stakeholders	Q1-3 2016	Increased contact with European travel trade; increased bookings for cycling and walking trips
<b>22.02</b> Immediate formation of a sales and marketing team to take part at all trade and consumer travel shows and fairs in Europe, as well as at the specialist cycling and walking events, in the first, third and final quarters of 2016.	ATA	AATDA, local cycling and walking operators, accommodation providers	Q1-3,4 2016	Increased contact with European travel trade; increased bookings for cycling and walking trips
<b>22.03</b> Organise an immediate programme of travel trade and media familiarisation visits to the Algarve (during the first and third quarters of 2016) to inspect cycling routes and walking trails, hosted by local accommodation and cycling and walking operators.	ATA	AATDA, local cycling and walking operators, accommodation providers	Q1-3 2016	Increased contact with European travel trade; increased bookings for cycling and walking trips
<b>22.04</b> Organise familiarisation visits to the Algarve to inspect cycling routes and walking trails, hosted by local accommodation and cycling and walking operators.	ATA	Local cycling and walking operators, accommodation providers	Q1-3 2016	Increased contact with European travel trade; increased bookings for cycling and walking trips

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
22.05	Encourage hotels and other accommodation providers to develop new bundled offers or packages for cycling and walking for sale online and to engage the international travel trade	ATA	AHETA Hotels and other accommodation providers	Q1-3 2016	New walking and cycling bundled product offers in place

### 3.8.2 Programme 23: Communications and Awareness Development among Algarve Accommodation Operators

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
23.01	Communicate key findings from this study at focussed meetings with stakeholders	AATDA		Q1-3 2016	Stakeholder engagement
23.02	Provide standard template for in-room information on things to see and do in the Algarve and encourage use	AATDA	AHETA ATA	Q1-3 2016	Activities template provide to hotels
23.03	Provide branded brochure racks for hotels and resorts to promote activity and adventure product providers	AATDA	Private sector sponsor	Q1-3 2016	Brochure racks in place

### 3.8.3 Programme 24: Business to Business (B2B) and Business to Consumer (B2C)

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
24.01	Trade client servicing through establishing personal contacts	Local activity providers and accommodation operators	AATDA ATA	2016	Increased sales
24.02	Regular attendance at trade shows/fairs and presentations in main centres	ATA	Local activity providers and accommodation operators	2016	Good level of take up by local operators; increased sales

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
24.03	Ongoing programme of hosting and support for overseas trade inspection visits	Local activity providers and accommodation operators – where hosted AATDA ATA	AATDA ATA Local activity providers and accommodation operators	2016	Increased sales
24.04	Production of sales literature and high quality interactive websites for local companies	Local activity providers and accommodation operators		2016	Increased sales; and hits and bookings through website

### 3.8.4 Programme 25: Algarve Walking Festival

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
25.01	Establish Algarve Walking Festival in October	Turismo do Algarve	Local activity providers and accommodation operators	Q1-3 2016	Algarve Walking Festival held in October 2016
25.02	Establish an Algarve Walking Festival Committee	Turismo do Algarve	Local activity providers and accommodation operators	Q1-3 2016	Algarve Walking Festival Committee established
25.03	Promote the Algarve Walking Festival online	ATA	Local activity providers and accommodation operators	Q1-3 2016	Algarve Walking Festival promoted



## 2016-2018 Market Awareness Development Plan

## 3.8.5 Programme 26: Market Awareness of the Algarve's Cycling and Walking Opportunities

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
26.01	ATA	Turismo de Portugal Turismo do Algarve Local cycling and walking operators, accommodation operators	2016-2018	Domestic and international marketing campaigns based around 'Experience a Different Algarve – Explore the Outdoors!' underway
26.02	ATA	AATDA	2016-2018	Cycling and walking promotion in domestic and overseas markets
26.03	ATA	Turismo de Portugal Turismo do Algarve Local cycling and walking operators, accommodation operators	2016-2018	Increased volume of walkers and cyclists in autumn, winter and spring months

	Action	Lead Agency	Partners	Timescale	Key Performance Indicator
26.04	Promote adventure tourism in the Algarve through use of large images and video at Faro Airport and on <a href="http://www.faro-airport.com">www.faro-airport.com</a> website	ATA	ANA Turismo de Portugal Turismo do Algarve	2016-2018	Cycling and walking media in place at Faro Airport
26.05	Promote cycling and walking opportunities in the Algarve in international specialist consumer magazines in key destination markets	ATA	Local cycling and walking operators, accommodation operators	2016-2018	Increased direct sales from magazine ads
26.06	Promote short cycling and walking activities in beach destinations as an add-on activity to beach holidays (Beach Plus), identifying opportunities for provision of information about short (1 hour) cycle rides near visitor hubs that provide a safe cycling opportunity e.g. Faro to Praia de Faro	ATA	Coastal Municipal Councils	2016-2018	Beach Plus cycling and walking activities promoted
26.07	Develop bundled offers for transport, accommodation and activities e.g. rail, accommodation, bike hire for both cycling and walking	ATA	Transport providers (rail/bus/car), Local cycling and walking operators, accommodation operators	2016-2018	Bundled offers prepared and sold online
26.08	Coordinated promotion and launch of Phase 1 of the Ecovia do Algarve including social media	Turismo do Algarve ATA	Conseil Général des Pyrénées Atlantiques, European Cycling Federation	Q1-3 2016	Coordinated promotion of the Ecovia do Algarve Phase 1
26.09	Coordinate promotion of Ecovia do Algarve as part of the Eurovelo network (Eurovelo 1 and Eurovelo 8) in collaboration with other countries	ATA Federação Portuguesa de Ciclismo		2019-2020	Coordinated promotion of the Ecovia do Algarve as part of the Eurovelo network

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
26.10	Promote Ecovia do Algarve south coast route as a Greenway, enabling use a regional walking route	ATA	AATDA	2018-2020	Increased numbers of walkers using the Ecovia do Algarve
26.11	Promote cycling and walking in the Algarve to cycling and walking associations in key overseas markets	ATA		2016-2020	Increased numbers of walkers and cyclists coming to the Algarve
26.12	Reinforce partnerships with specialist international tour operators for cycling and walking	ATA		2016-2018	Increased numbers of walkers and cyclists coming to the Algarve
26.13	Ensure a more focussed approach to overseas journalist's familiarisation visits to gain better international coverage	ATA		2016-2018	Improved articles in the press about cycling and walking in the Algarve
26.14	Engage with travel writers including Lonely Planet to ensure favourable coverage of cycling and walking in the Algarve	ATA	ATA	2016-2018	Improved articles in the travel guides about cycling and walking in the Algarve
26.15	Develop marketing campaign for the Algarve's cycling and walking product offer in rail stations in the Algarve	Turismo do Algarve	Caminhos de Ferro Portugueses	2016-2018	Advertising and images in rail stations
26.16	Introduce Route Passports for Via Algarviana, Rota Vicentina and Ecovia do Algarve <u>with stamps for each stage</u>	AATDA Rota Vicentina Association	Almargem Odiana Association	2016-2016	Route passports available
26.17	Identify local ambassadors to help promote cycling and walking in the Algarve in domestic and overseas markets	AATDA		2016-2018	Local ambassadors identified and active

## 3.8.6 Programme 27: Website: the Key Marketing and Promotional Tool

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
27.01	Produce webpages for adventure tourism in the Algarve as part of an upgraded <a href="http://www.visitalgarve.pt">www.visitalgarve.pt</a> content	Turismo do Algarve	Appointed company web design Turismo de Portugal	Q1-3 2016 Webpages live
27.02	Commission and manage website for walking, cycling and mountain-biking trails in the Algarve. GIS data to be linked to the AMAL GIS database and associated app  Second phase to include to include detailed information on bookable offers including accommodation, activities, bundles and transport, accommodation, transport, attractions.	ATA	Appointed company web design AATDA	Q1-3 2016-2018 Website live
27.03	Commission online version of current useable Ecovia do Algarve route with downloadable GPS tracks as part of hub trails website	AATDA	ATA Appointed specialist company	Q1/2 2016 GPS route available o Ecovia do Algarve website
27.04	Commission overall cycling and walking visitor map for the Algarve; and specific maps for the Ecovia do Algarve route and the Grande Rota do Guadiana route	AATDA	ATA Appointed specialist company Odiana Association	2016-2018 Maps available online and in print form

Action	Lead Agency	Partners	Timescale	Key Performance Indicator	
27.05	Commission social media strategy for promoting adventure tourism in the Algarve as part of the 'Experience a Different Algarve – Explore the Outdoors!' brand including Facebook, Twitter, Instagram and Pinterest	AATDA ATA	Appointed digital media company	2016-2017	Integrated social media strategy in place
27.06	Commission short videos of cycling and walking in the Algarve for use at trade fairs and for embedded videos on websites and for use at Faro Airport	ATA	Appointed digital media company	2017-2018	Videos developed and used in promotion
27.07	Commission mobile app for each regional trail	AATDA	ATA Appointed digital media company	2016-2017	Apps available for download
27.08	Ensure relevant information regarding the Ecovia do Algarve is included on the Eurovelo website	AATDA	ATA	2016-2020	Relevant information regarding Ecovia do Algarve included on Eurovelo website

## 3.8.7 Programme 28: Events and Festivals

Action	Lead Agency	Partners	Timescale	Key Performance Indicator
28.01	Continue proposed Algarve Walking Festival as an annual event each September	AATDA	Local activity providers Accommodation providers	2016-2021 Annual Algarve Walking Festival leading to increased awareness of walking opportunities and increased bookings
28.02	Establish annual Algarve Adventure Tourism Conference	AATDA	Turismo do Algarve	2017-2020 Algarve Adventure Tourism Conference held
28.03	Aim to attract Adventure Travel Trade Association (ATTA) conference to Algarve in 2020	AATDA	ATA Turismo do Algarve	2016-2020 ATTA conference held in 2020
28.04	Prepare a coherent and integrated media plan in relation to the promotion of cycling events in the Algarve including evaluation of the most beneficial media channels given specific objectives regarding international promotion	ATA	Portuguese Cycling Federation	2016-2020 Effective annual coverage of flagship events in international media
28.05	Develop and promote existing cycle races and consider new Algarve350 and 450 road cycle race to rival Mallorca312 including consultation regarding the optimum route	AATDA	Portuguese Cycling Federation	2017-2020 Algarve 350 and 450 cycle race held
28.06	Develop Algarve MTB Championship linked to new mountain biking centres	Portuguese Cycling Federation	AATDA	2018-2020 Algarve MTB Championship held
28.07	Develop Algarve events webpage with online registration/booking options, as part of Algarve trails website	ATA		2016 Algarve Events website live
28.08	Develop Ecovia do Algarve Marathon with half, 10k and 5k events and an Algarve Ultra Trail event with separate events at suitable locations	AATDA	Almargem Rota Vicentina Association Odiana Association	2017-2020 Ecovia do Algarve Marathon held Algarve Ultra-trail event held

## 4. Indicative Action Plan Cost by Programme

### 4.1 Indicative Costs

The indicative cost of implementing the *Algarve Tourism Products Assessment and Development Action Plan – Cycling and Walking* is shown below in Figure 11. This estimate shows the overall cost over the project, over a 3-year (2016-2018) timeframe to be €7,596m. **It should be noted that the costs shown are estimates. Further investigation will be required to arrive at more precise costings.**

Substantial investment will be required for the first three years to build up the Algarve's reputation as a leading destination for cycling, walking and other adventure activities, after which a lower annual investment will be required. Within the 3-year timeframe much of the required investment, particularly in relation to the establishment of the leadership organisation and for marketing and promotion, would be required within the first year.

### 4.2 Funding Mechanisms & Engagement Model

It is envisaged that initial investment will be largely drawn from public funds, particularly for capital investment and marketing awareness development. This follows the model used in Ireland, France, Switzerland and other destinations. Funding for maintenance of route infrastructure and for ongoing costs associated with websites and promotion are expected to be increasingly funded from the private sector through use of a similar associative model to the successful Rota Vicentina Association model on a region-wide basis. Use of advertising revenue associated with promotional material and concession revenue is also expected to be a significant source of ongoing funding.

Both ATA and Rota Vicentina Association operate membership/partner schemes; with the ATA having around 350 members and the Rota Vicentina Association over 150. The benefits to members/partners are being named on all marketing materials (including website), discounted participation at overseas fairs, and technical assistance and matching funding for their own marketing plans. Funds generated through membership dues are relatively modest – €315,000 in ATA's case – with the contribution towards joint marketing higher – just over €1m for ATA.

The membership/partner scheme for the proposed AATDA can be based on the existing models, with the widest possible range of participation encouraged since members/partners will receive the benefits of well-managed and enhanced routes and trails, strong environmental protection AND marketing and sales support; though this will entail around a quarter of ATA's existing members/partners being required to pay dues to a second organisation. The broad range of benefits provided through AATDA can serve to create acceptance of this necessity. ATA's marketing support – in particular the website dedicated to cycling and walking – will be separate from its other marketing and sales activities, so separate membership of the AATDA scheme will be necessary for companies to receive its benefits.



Figure 11: Action Plan Themes and Programme Areas

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
Organisation and Management	1: Create Strategic Leadership Organisation (AATDA)	€675,000  (€355,000 Y1, €160,000 Y2, €160,000 Y3)  Funding: majority public finance	Business organisation plan – €75,000  Legal, recruitment & communications costs – €100,000  3-year staffing costs – €540,000
	2: Trail Management	€750,000 (€250,000 p.a.)  Funding: Year 1 majority public funded with increasing proportion drawn from private sector sponsorship and contributions to AATDA, based on Rota Vicentina Association funding model.	Maintenance costs for 3-year period:  Ecovia do Algarve – €300,000 (€100,000 p.a.) – estimate, costs likely to increase as length of trail increases  Via Algarviana – €300,000 (€100,000 p.a.) could be divided on same basis as Rota Vicentina i.e. number of overnight stops or by km of route/municipality  Grande Rota do Guadiana – €30,000 (€10,000 p.a.)  Rota Vicentina – €120,000 (€40,000 p.a.)
	3: Stakeholder Coordination	0	
<b>Subtotal Organisation and Management:</b>		<b>€1,425,000</b>	

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
Product Development – Cycling	4: Ecovia Flagship Attraction	<p>€2.1m (€200,000 for phase 1)</p> <p>Funding: Majority from public finance plus EU finance where possible including use of Mobility grants. Use of sponsorship where possible.</p>	<p>Phase 1 – €200,000 (signage €150,000, route resurfacing €20,000, route segregation from N125 near Altura €30,000 for 1.5km)</p> <p>A Bias do Sul (east of Olhão) to Albufeira – €345,000</p> <p>B Albufeira to Portimao – €200,000</p> <p>C Portimao to Sagres – €360,000</p> <p>D Sagres to Odeceixe – €544,000</p> <p>E Odeceixe to Santiago do Cacém - TBC</p> <p>F Vila Real de Santo Antonio-Alcoutim – €477,000</p> <p>G Alcoutim-Mertola - TBC</p> <p>Proposal to link Ecovia do Algarve from Alcoutim to Odeceixe requires feasibility study. Proposal to develop Eurovelo 1 from Cape St Vincent to northern Spanish border requires feasibility study.</p>

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
	5: Looped Local Cycling Routes and Greenways	€406,000  Funding: Majority from public finance plus EU finance where possible including use of Mobility grants. Use of sponsorship where possible.	Greenway from Faro centre to Praia do Faro – €250,000 (may require additional funding if new/upgraded bridge required)  Five new looped cycle routes along Via Algarviana – €6,000 (€1,200 per route for routes of 20-100km)  Greenway between Sagres Fort and Cape St Vincent – €150,000
	6: Mountain-Biking	€450,000  Funding: Majority from public finance plus EU finance where possible. Use of sponsorship where possible.	Extension of Grande Rota do Guadiana walking & mountain-biking route to Mertol – €100,000  Upgrade surfacing on Via Algarviana – €100,000  Contribution to Algarve BTT centre – €250,000
	7: Supporting Measures – Cycling	€90,000  Funding: Combination of public funds plus ANA plus other private sector investment and sponsorship	Bike storage Faro Airport – €30,000  Bike Hire concession Faro Airport – €10,000  Blueway development – €50,000

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
Product Development – Walking	8: Ecovia do Algarve	0	Costs included in Programme 4
	9: Enhance Rota Vicentina, Via Algarviana, Grande Rota do Guadiana	€264,000  Funding: Majority from public finance plus EU finance where possible including use of Mobility grants. Use of sponsorship where possible.	Extension of Rota Vicentina to Lagos – €50,000  Expansion of Fisherman's Trail €30,000  Four new looped walks on Rota Vicentina – €24,000  Extension of Grand Rota do Guadiana to Mertola – €100,000  Directional signage replacement on Via Algarviana (€20,000 p.a.) – €60,000 for 3-year period
	10: Local Walking Routes	€225,000  Funding: Majority from public finance plus EU finance where possible including use of Mobility grants. Use of sponsorship where possible.	Coastal walking route from Lagos and Burgau – €100,000  Coastal walking route from Salema to Sagres – €75,000  5 short walks near coastal hubs – €50,000 (signage and promotional costs)
	11: Visitor Safety	0	Repair costs to be met by Municipal Councils

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
	12: Supporting Measures – Walking	€410,000  Funding: Majority from public finance plus EU finance where possible including use of Mobility grants. Use of sponsorship where possible.	Faro Heritage Trail (pilot) – €35,000 for signage and promotional material  8 further heritage trails @ €35,000 per trail – €315,000  Multi access trails sections – (€20,000 per route) – €60,000
<b>Subtotal Product Development:</b>		<b>€3,945,000</b>	

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
<b>Product Enablers and Quality Management</b>	13: Improve Visitor Access	€200,000  Funding: Majority from public finance plus EU finance where possible including use of Mobility grants. Use of sponsorship where possible.	Most costs included in overall AATDA cost.  Signage and promotional material for Algarve Mountain Touring Routes x 2 – €200,000
	14: Capacity Building	€20,000  Funding: Majority from public finance plus EU finance where possible. Use of sponsorship where possible.	Most costs included in overall AATDA cost or existing programmes  Rota Vicentina pilot schools engagement project – €20,000

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
	15: Data Collection and Visitor Monitoring	€250,000 (est) Funding: Majority from public finance plus EU finance where possible.	Cost for Faro Airport exit survey €150,000 (€50,000 p.a.) Cost for visitor monitoring programme to be confirmed by further evaluation and feasibility study. (c.€40,000 for trail counters - €15,000 for whole RV, €10,000 for Algarve sections, c. €15,000 for VA, c. €7,500 for GRG, c. €7,500 initially for EA) Visitor satisfaction survey: €90,000 (€30,000 p.a.)
	16. Standardisation	€40,000 Funding: Majority from public finance plus EU finance where possible including use of Mobility grants. Use of sponsorship where possible.	Road signage strategy – €20,000 Trail signage strategy – €20,000 Training and certification programme for interpretative guides – €30,000
	17: Sustainable Development	0	Most costs included in overall AATDA cost or existing programmes Increased support required for ICNF cost to be evaluated by AATDA
<b>Subtotal Product Enablers and Quality Management:</b>		<b>€510,000</b>	

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
Accommodation Diversification and Development	18: Familiarisation & Training	€45,000 ATA budget	International fam visits – €40,000 Algarve trail fam visits – €5,000
	19: Facility Upgrade	0	
	20: Rural Tourism Accommodation	TBC	Proposed rural accommodation programme to be evaluated by AATDA
<b>Subtotal Accommodation Diversification and Development:</b>		<b>€45,000</b>	

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
Access	21: Enabling Better Access	Subject to negotiation	
<b>Subtotal Access:</b>		<b>Subject to negotiation</b>	



Theme	Programme Area	Indicative Programme Cost	Detail (where available)
Sales Development and Marketing Communications	<b>2016 Sales Development Plan</b>		
	22: Algarve Cycling and Walking Roadshow in Main Markets	€250,000 Funding: Majority from public finance plus EU finance where possible. Use of sponsorship where possible.	Attend trade shows, fairs and specialist events – €100,000 Roadshow in main markets after each trade show, fair, event – €50,000 Fam visits to Algarve – €100,000
	23: Communications and Awareness Development among Algarve Accommodation Operators	€30,000 Private sector sponsorship	Communication meetings with stakeholders – €5,000 Templates for in-room information – €5,000 Brochure racks – €20,000
	24: Business to Business (B2B) and Business to Consumer (B2C)	€175,000 Funding: Majority from public finance. Use of sponsorship where possible.	Trade client servicing – €5,000 Trade shows – €50,000 Fam visits – €20,000 Sales literature and websites for local companies – €100,000
	25: Algarve Walking Festival	€100,000 Private sector sponsorship	Establish walking Festival – €100,000

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
	<b>2016-2018 Market Awareness Development Plan</b>		
	26: Market Awareness of Algarve Cycling and Walking	€406,000 (€130,000 p.a. + €16,000 Y1)  Funding: Majority from public finance plus EU finance where possible. Use of sponsorship where possible.	Targeted marketing and PPR campaign – €150,000 (€50,000 p.a.)  Faro Airport campaign – €90,000 (€30,000 p.a.)  Magazine promotion in specialist markets – €90,000 (€30,000 p.a.)  Launch of phase 1 Ecovia – €10,000  Algarve rail station advertising campaign – €60,000 (€20,000 p.a.)  Route passports on regional trails – €6,000
	27: Website: the Key Marketing and Promotional Tool	€460,000  Funding: Majority from public finance plus EU finance where possible. Use of sponsorship and advertising where possible.	Adventure webpages for <a href="http://www.visitalgarve.pt">www.visitalgarve.pt</a> – €30,000  Commission new Algarve trail website – €200,000  Maintain Algarve trails website – €60,000 (€20,000 p.a.)  Online version of existing Ecovia route – €5,000  Cycling and walking visitor map – €30,000  Social media strategy – €30,000  Short videos for promotion – €25,000  Mobile app for each trail – €80,000 (€20,000 per route x 4)

Theme	Programme Area	Indicative Programme Cost	Detail (where available)
	28: Events and Festivals	€250,000 Funding: Majority from public finance plus EU finance where possible including use of Mobility grants. Use of sponsorship and advertising where possible.	Annual walking festival – €30,000 (€10,000 p.a.) Annual Algarve Adventure Tourism Conference – €60,000 (€20,000 p.a.) Media plan for promoting cycling events – €10,000 Promotional costs for cycling events – €60,000 (€20,000 p.a.) Develop and promote existing and new cycling races e.g. Algarve 350 – €60,000 (€20,000 p.a.) Ecovia do Algarve running events – €30,000 (€10,000 p.a.)
<b>Subtotal Sales Development and Marketing Communications:</b>		<b>€1,671,000</b>	
<b>TOTAL PROJECT COST: €7,600,000 OVER 3-YEARS (2016-2018)</b>			