



Tourism Development
International

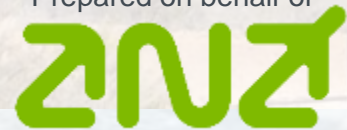
Algarve Tourism Products

Assessment and Development Action Plan

Cycling & Hiking



Prepared on behalf of

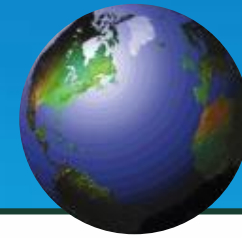


Aeroportos
de Portugal

Who are TDI?

Destination Planning and Tourism Product Development Specialists

- Established 1988
- Based in Dublin, Ireland
- Projects in 20 countries –
Europe, N. America, Asia and Africa

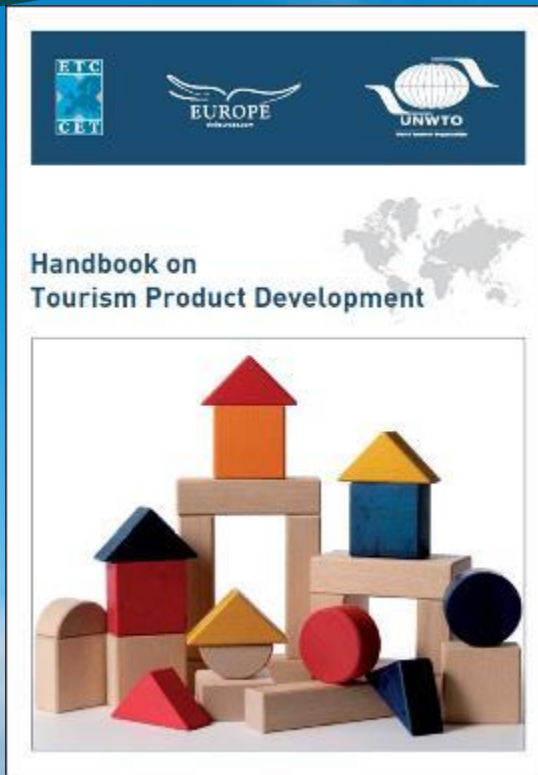


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Who are TDI?



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Major contracts for International Tourism Agencies



Why this project here and now?



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Key issues

- Algarve is Portugal's main tourist area with 42% of tourist bed-nights.
- Main economic activity is tourism – 60% employment & 66% GDP.
- Over dependence on sun & sea tourism results in high seasonal demand - 54% of total traffic at Faro airport takes place in 4 summer months.

Why this project here and now?



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Key issues

- Significant seasonality issues for Faro airport & inefficiencies for wider regional economy.
- Lack of tourism product offer outside the summer season – things to do and see.
- Algarve is not a year round sun destination.

Why this project here and now?



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The project aims to restructure the existing product by focussing on new visitor experiences based on two themes of cycling and hiking.



Why this project here and now?



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Cycling and hiking were prioritised
due to:



Their
potential in
addressing
seasonality

Similarities in
infrastructural
requirements



Why this project here and now?



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Project Goal:

Increase the number of tourists attracted to the region by the cycling and hiking product in the off peak season.

To achieve this goal it is essential to identify ways to improve the structure of the existing offer of the new differentiating products in terms of:

- product and service design
- service and experience delivery
- communication and promotion
- distribution

Stakeholders Algarve



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Primary Stakeholders

Trail
Managers

Tour
Operators

Municipal
Councils

Destination
Management
Orgs

Accommodation

Airlines

Activity
Providers

Algarve Adventure Tourism Destination

Host
Communities

National
Recreation
Orgs

Regional
Orgs

Government
Agencies

Local
Transport

Tour
Operators

Trade
Associations

Media

Visitors

Secondary Stakeholders

What have we done?



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On the ground...

- Covered 4,000 km within the Algarve.
- Walked & cycled carefully selected cross-section of trails in the region.
- Interviewed 40 key stakeholders in the industry including managing agencies of all major trails.
- Consulted 20 businesses as part of an international trade survey in Algarve's key markets.
- Consulted 90 businesses as part of a local trade survey.



What have we done?



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Local Trade Survey

1. Alameda Hostel
2. Hotel São Sebastião de Boliqueime
3. PRIORITYPARADISE - AGÊNCIA DE TURISMO LDA
4. Casa Modesta
5. Descansa Pernas
6. Girafa Sãbia
7. Pick Me Up - Viagens e Turismo, Lda
8. Memmo Baleeira
9. Frederica Costa, Unipessoal, Lda
10. Residencial Rocha da Gralheira
11. Michael Coelho Guerreiro
12. Urbanização Setobras
13. Luís Miguel Agostinho Gonçalves
14. Vicentina Travel
15. Companhia das Culturas (Estabelecimento de Hospedagem)
16. MAGIKCOURTESY - UNIPESSOAL LDA
17. Monchique Alternativtour, Animação Turística, Unipessoal, Lda
18. Castle Alcoutim
19. Globalroute - Transporte de Passageiros
20. Moradia
21. Myttaxi - Agencia de Viagens, Lda
22. Condomínio do Mar
23. DAILY RENT, LDA.
24. Hotel Residencial Salema
25. Du 4 Arte Hostel
26. Vila Fria
27. Casa Bamboo
28. S. José Algarve Hostel
29. Casa Azul
30. Duas Quintas
31. EXUBERANÇA, Animação Turística, Unipessoal, Lda
32. Jocrival, Serviços de Taxi Lda
33. Apartamentos Turísticos Balaia Sol
34. Etnogarbe
35. A ROCHA Life, Unipessoal Lda
36. Júpiter Algarve Hotel
37. Estúdios Salinas
38. Apartamento 203
39. Sheraton Algarve Hotel & Pine Cliffs Resort
40. Hotel Vila Galé Marina
41. Apartamentos Turísticos Cerro Mar Atlântico
42. Aldeamento Turístico Vilanova Resort
43. Hotel Apartamento Tivoli Marina Portimão
44. Blue & Green Vilalara Thalassa

What have we done?



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Local Trade Survey

45. HOTEL - APARTAMENTO GOLDEN DUNA
46. LAGORENT - RENT A CAR, LDA.
47. Stork Hostel
48. Casa Bela Moura
49. Luxury On Two Wheels
50. MTBIKES Algarve
51. SAL
52. Pousada da Juventude de Faro
53. Parque de Campismo de Espiche - Turiscampo
54. Apple Holidays
55. Guest House Capitko Mor
56. Quinta do Mel
57. Rotas Ancestrais
58. Turitravel
59. Alvor Travel - Agncia de Viagens
60. Portugal 4U
61. Monte Joco Roupeiro
62. Bartholomeu Guest House
63. Parque de Campismo de Albufeira
64. Apartamentos Tur'sticos Oasis Village
65. Tixis Pinheiro & Delmira, Lda
66. Monte da Xara
67. My Choice Algarve
68. White Sun Hostel
69. ALUGUERMOTO - ALUGUER DE VELOCÊPEDES, LDA.
70. Vila Muchima
71. Hotel Torre Velha
72. Apartamentos Costa D'oiro Ambiance Village
73. Vila Monte - Farm House
74. PRIME CHAUFFERS, UNIPessoal LDA
75. One2seven
76. Bed & Breakfast Villa Laguna
77. Top Atl%ntico
78. Hostel Vict—ria
79. Formosamar, Lda - Formosamar
80. Apartamentos Tur'sticos Pine Cliffs Residence
81. Apartamentos Atalaia
82. Transgharb
83. Aldeamento Tur'stico Four Seasons Fairways
84. Casa Azul
85. Hotel Magn—lia
86. Valente & Carvalho - Fun Bike Shop
87. Branquinho da Silva
88. Transfar - Agncia de Viagens e Turismo, Unipessoal, Lda.
89. Parque Rural da Quinta de Odelouca
90. The Mountain Bike Adventure

What did we find out?



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Growing Demand for Cycling and Hiking In the European Market

20.36m

Trips involving an
overnight stay

Economic value
€8.9bn

2.27bn

Day Trips

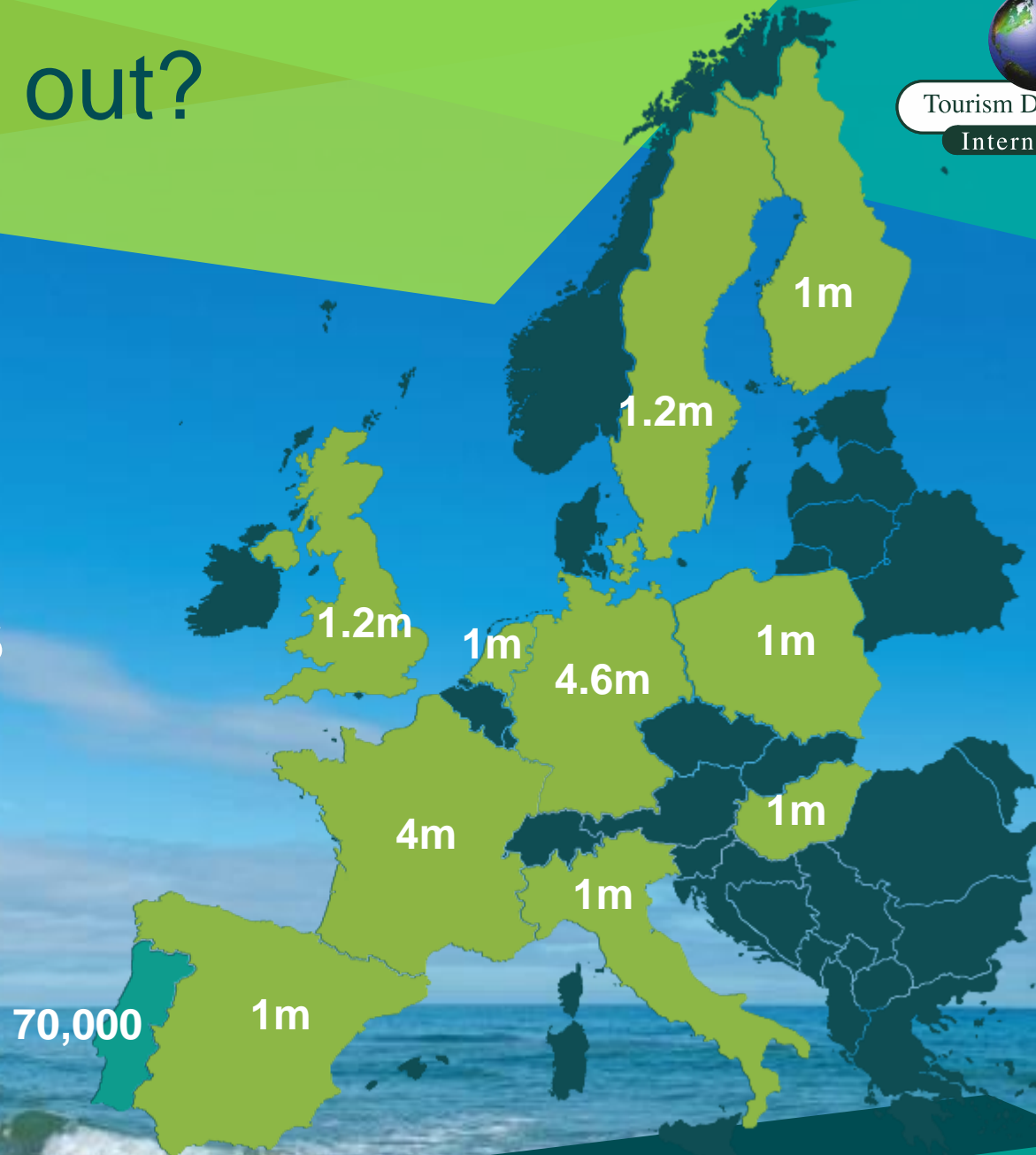
Economic value
€35bn

What did we find out?



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Main Destinations For overnight trips



What did we find out?



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Negatives

- Some poor quality trails
- Dangerous infrastructure in places
- No single website or map for trails
- Inadequate marketing of hiking & cycling
- Lack of direct flights from key markets
- Poor quality signage
- Limited facilities in places
- Lack of leadership and organisation
- Lack of data collection



What did we find out?



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Positives

- Exceptional climate, location, and environment
- Very high quality food
- Very friendly people
- Rich culture and heritage
- Good quality inland roads
- Ecovia do Litoral has potential to become world class cycle greenway
- Rota Vicentina is a world class well managed walking trail
- Via Algarviana offers significant inland opportunity



What did we find out?



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Walking Trails

| 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 | *** | * | * | * | * |
| | 26 | 17 | 15 | 13 | 9 |

What did we find out?



Cycling Routes

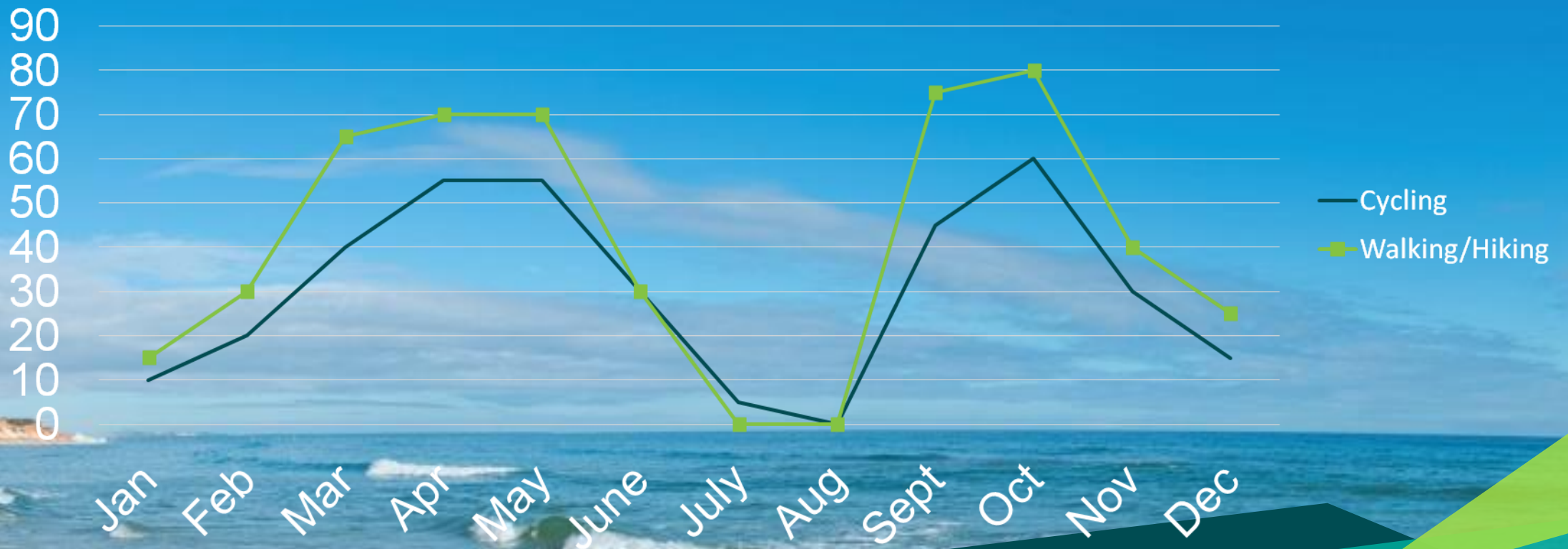
| Criteria | Regional Routes | | | | Local Routes |
|--|---------------------------------|----------------|-------------------------|-------------------|--------------|
| | Rota Vicentina (Historical Way) | Via Algarviana | Grande Rota do Guadiana | Ecovia do Litoral | |
| Condition | *** | ** | ** |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

What did we find out?



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Months Representing the Best Potential for Cycling and Walking in the Algarve/Length of Stay

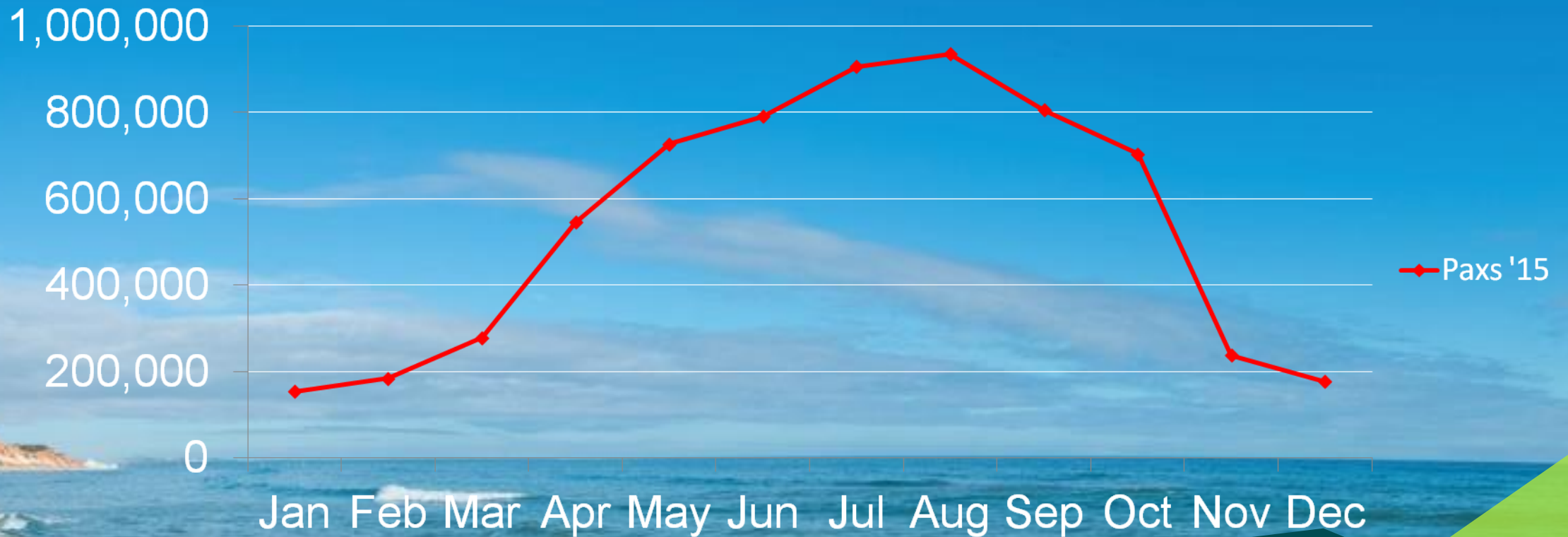


Current Seasonality



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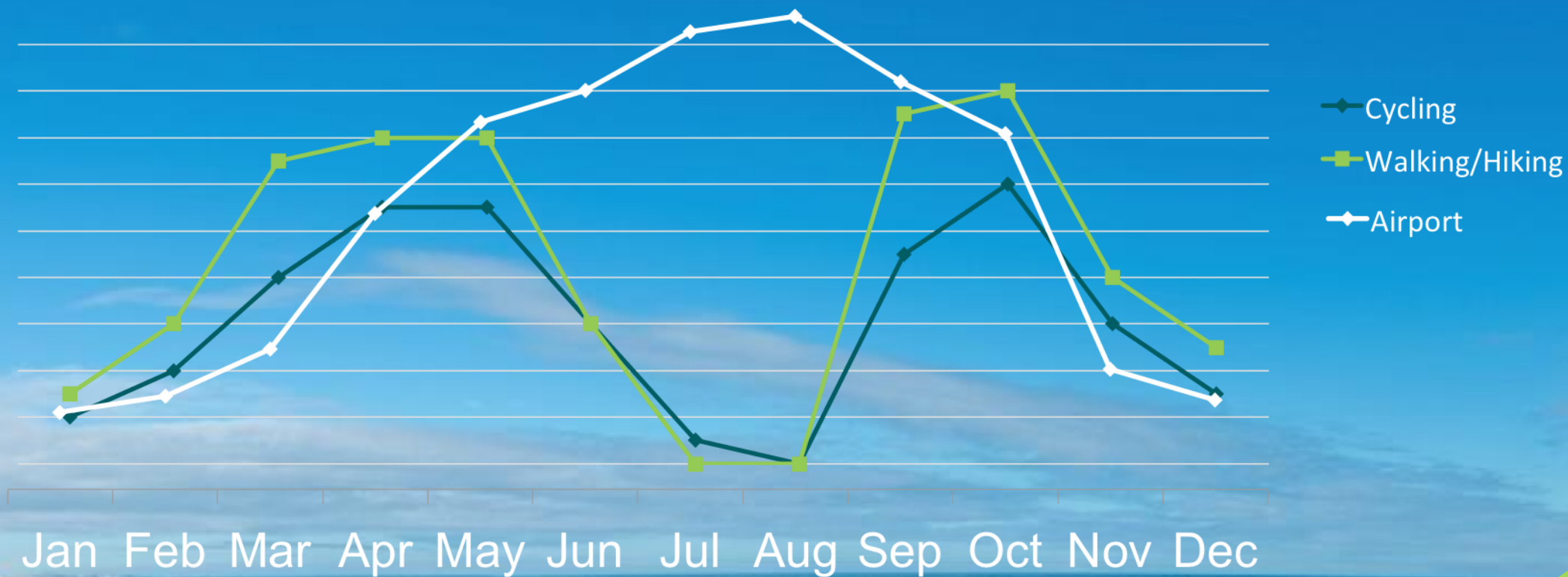
Faro Airport: Commercial Traffic by month



Seasonality based on diversified tourism product



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What did we find out?



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Profile of Cycling Tourists (Best Potential)

- Aged 45 – 55
- Men and women
- First time visitors
- Couples, small groups & families

What are competitor destinations doing?



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SWITZERLAND

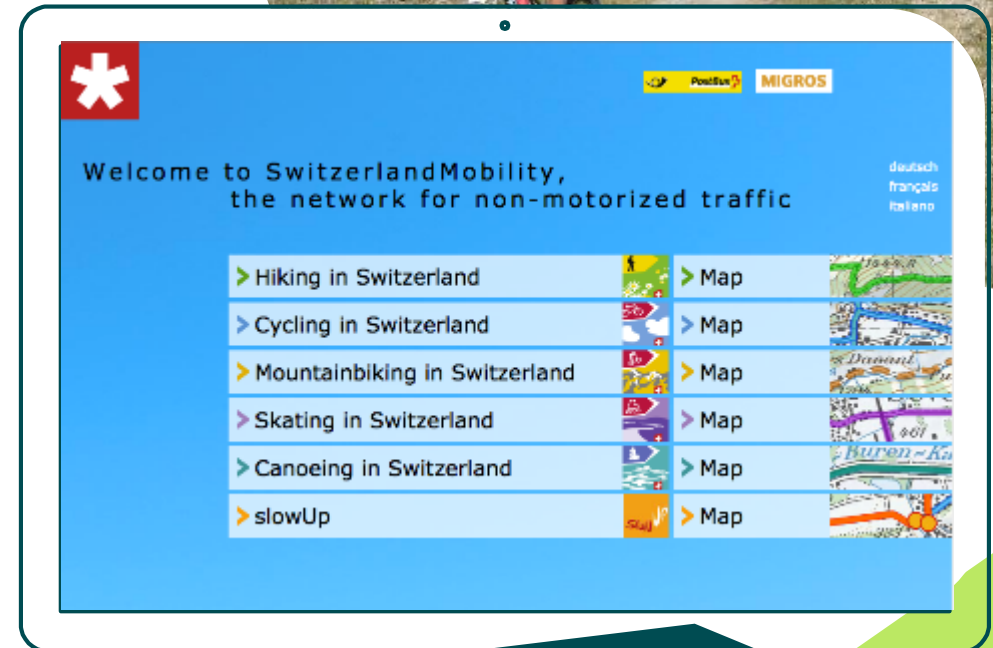
34,000km **€2.26bn**

of Switzerland
Mobility routes

Annual value of
hiking

300,000
overseas hikers
each year

€11.5m
Cost to implement
trails over 3 years



What are competitor destinations doing?



MALLORCA

60,000 → **150,000+**
cycle tourists
in 1990 to
cycle tourists
in 2014

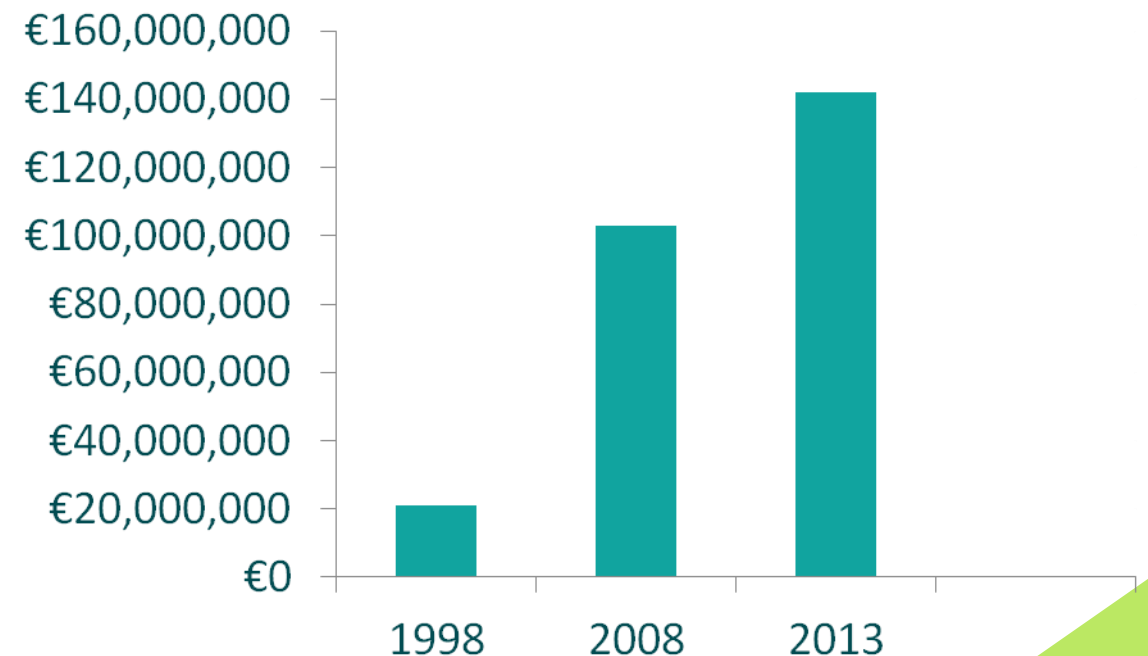
€145m

Value in
2014

€106

average
spend per
day

■ Economic Impact of Cycling Tourism in Mallorca



What are competitor destinations doing?



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FRANCE (LOIRE A VELO)

800km
off road route

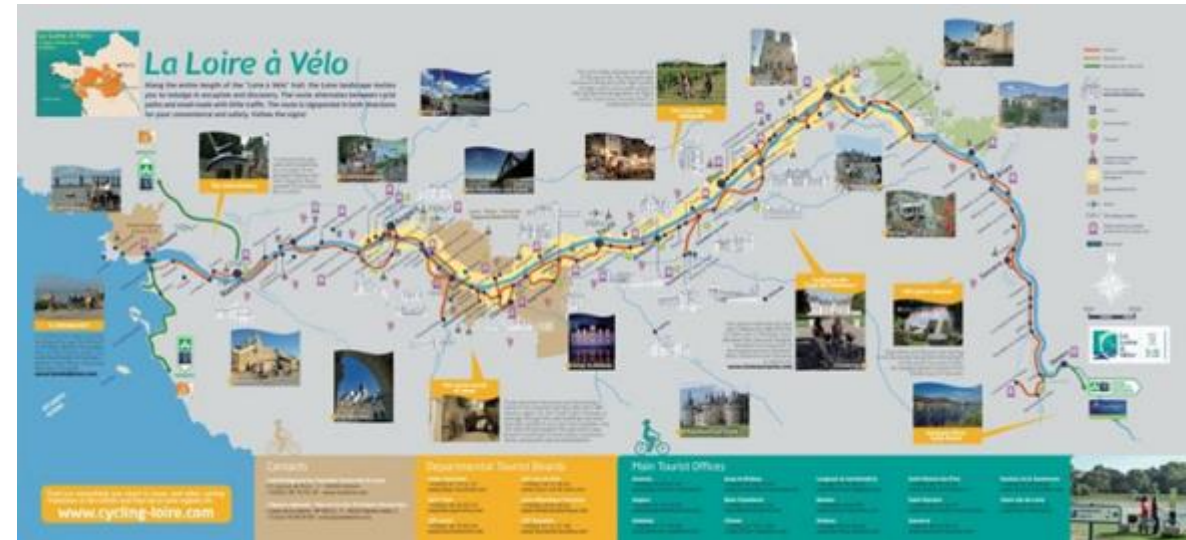
€52m

Financed by local
authorities – cost

956,000
users in 2014

€20m

of direct benefit



A vision for the Algarve?



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- Develop the image of the region.
- Change the perspective held by the local business community and the international market place.
- Incorporate concept of a new approach to tourism.



A vision for the Algarve?



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‘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.

...achieved through its establishment as a **leading destination for cycling and hiking**...

...**complementing** its summer sun and sea and golf tourism...

...to make the Algarve a **year round** destination.

**‘Experience
a Different
Algarve –
Explore the
Outdoors!’**



How can stakeholders in the Algarve help achieve that vision?



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- Organisation and Management
- Product Development – Cycling
- Product Development – Walking
- Product Enablers and Quality Management
- Accommodation Diversification and Development
- Access
- Sales Development and Marketing Communications



Development Action Plan



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7

themes

135

prioritised actions with key
performance indicators

28

programme areas

5 year

timescale

Organisation and Management



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Key Projects

- **Leadership** - establish Algarve Adventure Tourism Development Association composed of Turismo do Algarve and AMAL working in collaboration with ATA – strategic leadership informed by an external advisory committee formed by representatives of key stakeholders.



Organisation and Management



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Key Projects

- **Trail Management** – identify long term funding sources for key regional routes – short term public sector with increasing proportion from private sector.

1

Product Development – Cycling



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Key Projects

- Relaunch **Ecovia do Algarve** as part of Eurovelo network.
- **Local routes** - Looped cycle routes on Rota Vicentina, greenway between Sagres Fort and St Vincent, Faro marina to Praia do Faro greenway.
- Support network of Algarve **road cycling routes**.
- **Mountain-biking** - Support for Algarve BTT centre.
- **Bike storage & bike hire** at Faro Airport.



Ecovia Issues



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- Grande Rota do Guadiana (65km)
- Rota Vicentina Historical Way (231km)
- Rota Vicentina Fishermans Trail (120km)
- Rail Line
- Ecovia do Litoral (214km)
- A Lagos (Rio Alvor) - Portimao (Rio Arade)
- B Faro (Pontes Marchil) - Bias do Sul (Olhao)
- C Altura (Castro Marim) - Retur (Castro Marim)
- Local Walks on Via Algarviana
- Via Algarviana (300km)
- A Link 1 Parises - São Brais de Alportel (18.4km)
- B Link 2 ????? - Salir (28.2km)
- C Link 3
- D Link 4
- E Link 5



Ecovia Issues









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Proposed Cycling Routes



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-  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



Product Development – Walking



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Key Projects

- **Ecovia do Algarve** greenway
- Extend **Rota Vicentina** to Lagos, extend Fisherman's trail, 4-5 local hiking routes on Rota Vicentina
- Extend **Grande Rota do Guadiana** to Mertola
- Continue to upgrade **Via Algarviana**
- **Faro Heritage Trail** as a pilot initiative as part of an Algarve Heritage Trails programme
- **Local walking routes** - coastal routes and near beach destinations
- **Ensure visitor safety** by addressing dangerous infrastructure

3

Dangerous Trails!



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Proposed Walking Routes



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- Grande Rota do Guadiana
- Rota Vicentina Historic Way
- Rota Vicentina Fisherman's Trail
- Rail Line
- Heritage Trails
- Ecovia do Algarve
- Local Walks on Via Algarviana
- Via Algarviana

- A Lagos (Ria Alvor) - Portimão (Rio Arade)
- B Faro (Pontes Marchil) - Bias do Sul (Olhão)
- C Altura (Castro Marim) - Retur (Castro Marim)

Local Walks on Via Algarviana

Via Algarviana

- A Link 1 Paris - São Brás de Alportel (18.4km)
- B Link 2 ????? - Salir (28.2km)
- C Link 3
- D Link 4
- E Link 5



Product Enablers and Quality Management



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Key Projects

- **Improving visitor access** - provision of information on public transport, better transport linkages and baggage transfer.
- **Build capacity** - training, opportunity identification and raising awareness of hiking and cycling opportunities.
- **Data collection and visitor monitoring** – exit survey at Faro airport, visitor monitoring.
- **Standardisation** – road signage strategy, trail signage strategy, trail standards, consistent approach to information provision.
- **Sustainable development** – ensure growth of cycling & hiking is sustainable, natural resources are protected, promote market ready trails.

4

Accommodation Diversification and Development



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Key Projects

- **Familiarisation & training** – international and regional fam visits, training programme.
- **Facility upgrade** – minimum standards, bike hire.
- **Rural tourism** – focus on rural accommodation provision.

5

Access



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Key Projects

- **Negotiation with airlines** - to increase year round flight schedules.
- Continue trend of **reducing Faro Airport winter charges.**

6

Sales Development and Marketing Communications



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Key Projects

- **2016 Sales Development Plan** – actions include fam visits, trade shows, events, promotions, trails website, bundled offers.
- **Communication** – newsletter, in-room information, brochure racks.
- **B2B & B2C** – trade client servicing, trade shows & presentations, hosting fam visits.
- **Events** - Algarve Walking Festival, Algarve Adventure Tourism Conference, developing existing and creating new events.
- **2016-2018 market awareness development plan** – destination re-positioning, coordinated promotion, partnership development, ambassadors.
- **Algarve trails website** – fully integrated world-class stand-alone digital platform – the key marketing and promotional tool – informative in phase 1 and transactional in phase 2, a platform for bookable offers.
- **Maps, apps and social media**



Why is it important that the Algarve invests in this now?



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- Maintaining **competitiveness**.
- Addressing **seasonality** issues.
- Tapping into **international demand** for more high quality walking and cycling facilities.
- Developing **infrastructure** that can provide opportunity for local enterprise.
- Maximising existing hiking and cycling **opportunities**.
- Helping to **reposition** the Algarve as an adventure tourism destination, **as well as** beach & golf – raising awareness.
- Improving and creating **linkages** between places, people and accommodation.
- **Making it easier** for walkers and cyclists to come to the Algarve & providing them with **better information**.

What will success look like?



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- Increased revenue
- Decreased seasonality
- Increased visitor and domestic use of recreational infrastructure.
- Increased awareness of Algarve's scenic beauty.
- Increased visitors to inland areas resulting in economic opportunities and opportunities to address rural depopulation.

What will success look like?



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Cycling & hiking have huge potential for the Algarve.

We have worked with you to identify a vision.

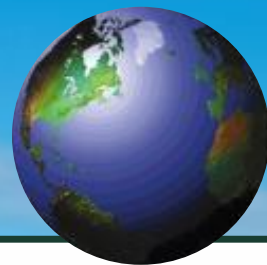
This plan is an ambitious but pragmatic roadmap to achieve that vision.

**WORKING TOGETHER IN PARTNERSHIP YOU CAN MAKE THIS
HAPPEN!**



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Obrigado!



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