

8th
January
2016

ALGARVE TOURISM PRODUCTS ASSESSMENT AND DEVELOPMENT ACTION PLAN



Prepared on behalf of



Cycling & Walking Situation Analysis



www.tourismdev.com

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Introduction

This document represents the principal findings and conclusions arising from the wide ranging programme of research, consultation and analysis undertaken by Tourism Development International (TDI) in the four months since the commencement of the Algarve Tourism Products Assessment and Development Action Plan. It is the culmination of Stage 1 Situation Analysis and Opportunity Assessment.

The Stage 1 report is organised in seven sections, as follows:

1. Destination Analysis
2. Market Analysis
3. Market Research and Consultations
4. Product Audit Assessment
5. Best Practice Case Studies
6. SWOT Analysis
7. Comparative Advantages and Gap Analysis

TDI has drawn on the findings and conclusions arising from this situation analysis in the preparation of the *Algarve Tourism Product Assessments and Development Action Plan – Cycling & Walking*. The latter is presented as a separate document.

1. Destination Analysis

1.1. Area Profile

The Algarve region covers 4,997 km², shown on *Map 1: Study Area Context* below. The Algarve consists of a wide variety of topographies and geographical features. The coastal (Litoral) area to the east of Faro is characterised by the wetland areas of the Ria Formosa Natural Park with a succession of towns including Olhao, Tavira, and Vila Real do Santo Antonio. The coast to the west of Faro is increasingly rugged with cliffs interspersed by the beaches the Algarve is famous for. The west coast, Costa Vicentina, consists of breath-taking cliffs and beaches which are part of the Cape St Vincent Natural Park and the Sudoeste Alentejano e Costa Vicentina Natural Park. The southern coast is approximately 155km long and the western coast around 50km from Cape St Vincent to the border with the neighbouring region, Alentjo, to the north.

Moving away from the coast to the Barochal area the topography begins to consist of more upland areas interspersed with farmland (olives and almonds and other fruits); beyond are the mountain ranges of the Algarve with many national forests in the valleys between the upland areas. There are exceptional views from the peaks of Rocha da Pena and from the Monchique area over the entire Algarve inland area and beyond to the coast with the highest point of the Algarve at Foia (902m).

The eastern border of the Algarve follows the River Guadiana corridor and consists of wetland areas to the south close to Castro Marim, becoming increasingly mountainous when moving north. The Guadiana corridor includes several settlements with the town of Alcoutim in the north-west.

The inter-municipal community of the Algarve region includes sixteen municipal councils with a combined resident population of around 450,000. The capital of the Algarve region is the city of Faro, the administrative authority of the Algarve until 2004. The municipal councils and their principal settlements are shown in Figure 1 below.

Figure 1: Municipal Councils and Principal Settlements

Municipal Council	Population	Area	Principal Cities*/Settlements/Resorts
Loulé	70,622	763.67	Loulé*
Faro	64,560	202.57	Faro*
Portimão	55,614	182.06	Portimão* Praia da Rocha Alvor
Olhão	45,396	130.86	Olhão*
Albuferia	40,828	140.66	Albuferia* Quarteria*/Vilamoura
Silves	37,126	680.06	Silves* Armação de Pêra
Tavira	26,167	606.97	Tavira*
Lagos	31,049	212.99	Lagos*
Lagoa	22,975	88.25	Lagoa*
Vila Real de Santo António	19,156	61.25	Vila Real de Santo António* Monto Gordo
São Brás de Alportel	10,662	153.37	São Brás de Alportel
Castro Marim	6,747	300.84	Castro Marim
Monchique	6,045	395.30	Monchique
Aljezur	5,884	323.50	Aljezur
Villa do Bispo	5,228	179.06	Villa do Bispo Sagres
Alcoutim	2,917	575.36	Alcoutim
Total	451,006	4996.8	

Designated Areas

Around 40% of the Algarve is designated as protected areas, indicative of the significant flora and fauna to be found in the region. This is a relatively high figure, similar to that of New Zealand. Principal protected areas in the Algarve are shown in Figure 2 below.

MAP 1: Algarve Study Area



KEY:

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

Figure 2: Principal Protected Areas in the Algarve

Area	Closest City/Town/Village	Features
Parque Natural do Sudoeste Alentejano e Costa Vicentina (Southwest Alentejo and Costa Vicentina Natural Park)	Runs 110km from Sagres to north of Aljezur	Coastal cliffs, & remote beaches, unique plants, otters, foxes, 200 bird types, Rota Vicentina routes
Reserve Natural do Sapal de Castro Marim e Villa Real de Santo Antonio	Castro Marim	20 sq.km of marshland and salt pans, flamingos, spoonbills, avocet, Caspian terns, white storks. Portugal's oldest nature reserve (1975), winter visitors include greater flamingos, spoonbills, Caspian terns, springtime white storks
Parque Natural de Ria Formosa/Ria Formosa Natural Park	VR do Santo Antonio-Faro	60km long, 18,000ha - marshes, salt pans, lakes, creeks and dune islands, beaches & birdlife. Mediterranean chameleons.
Serra do Caldeirao	Loule	30km north of Loule, beautiful protected area of undulating hills, cork trees and harsh scubland. The area is renowned for its bird varieties. Ancient village, excellent cuisine. Traditional water taps and fountains (fontes).
Sagres Biogenetic Reserve	Sagres	In spring flowers are everywhere including wild orchids and endemic plants.
Rocha da Pena	Pena	479m high limestone outcrop in the Serra de Caldeirao foothills. Classified site because of its rich flora and fauna. Orchids, narcissi and native cistus cover the slopes. Red foxes, Egyptian mongooses are common. Bird species include the huge eagle owl, Bonelli's eagle and the buzzard. Centro Ambiental - environmental centre in Pena village.

1.2. Destination Marketing

Destination marketing for the Algarve is undertaken by both the Algarve Tourism Board (ATB), the regional arm of the national tourism authority Turismo de Portugal, and the Algarve Tourism Association (ATA), the private sector membership body. Turismo do Algarve's role is confined to the promotion of the Algarve within Portugal and Spain. ATA, funded by Turismo do Algarve (via Turismo do Portugal) promote the Algarve as a destination worldwide.

ATB has an annual budget of €5.5 million, with 20% allocated to joint public-private overseas promotion. Its focus is on the broader nature tourism sector rather than component activities within it such as cycling and walking. To that end it developed the initial Algarve Nature Week earlier in 2015 with special packages promoted nationally and internationally and showcased nature features and activities to international tour operators and media. ATB provides financial support to development activities associated with cycling and walking such as the website for Rota Vicentina.

ATA's marketing budget is of the order of €7 million, split between beach, golf, events/MICE and nature. Significant levels of support is given to the airlines and tour operators featuring the Algarve. ATA is currently developing a website for the Algarve's cycling and walking routes along the lines of the Azores model, see www.visitazores.com.

In addition to its website, ATA participates at overseas trade fairs in order to develop international trade contacts and facilitate partnerships with local operators, organises familiarisation trips and produces brochures. ATA's responsibility with regards to cycling and walking, as with ATB is at a broad nature tourism product level with the person responsible for cycling and walking promotion also responsible for wellness and all other sports including golf and motor-racing.

Faro is an example of a municipality that recognises its potential to draw visitors to the city for a combination of its cultural and natural heritage assets. It has undertaken research to underpin the development of a city brand, aims to be a European City of Culture by 2027, and has established a multi-party "supporting committee". It is implementing a series of product development and improvement measures (e.g. walks and trails on the town's website, pavement signage) but lacks the resources to carry out marketing and promotional activities.

2. Market Analysis

2.1. Market Performance

Portugal Tourism: Portugal received 9.3 million international tourist arrivals at collective tourism establishments in 2014, a strong rise of 12.3% over the level in 2013 following a growth of 8% in that year over 2012. During the same period total international tourist arrivals in the UNWTO regional classification of Southern/Mediterranean Europe rose by between 6.5 and 7% a year, indicating that Portugal is outperforming the region¹. Receipts from international tourists staying at collective tourism establishments in the country also grew by 12.4% in 2014 reaching US\$13.8 billion. The overall total of international tourist arrivals, including those not staying in registered accommodation, amounted to 16 million in 2014².

The WTC Travel and Tourism Economic Impact 2015 report for Portugal³ shows that travel and tourism makes a direct contribution to the country's GDP of €10.4 billion in 2014, a level that is expected to rise by 2.5% a year to 2025, with its share of GDP rising from 6% to 6.9%. Taking into account the wider effects from investment, the supply chain and induced income, travel and tourism's contribution stood at 15.6% in 2014 and is expected to grow to 17% by 2025 reaching €33.6 billion.

Algarve Tourism: Tourism to the Algarve, based on passengers (arrivals and departures aggregated) at Faro Airport, reached 6.2 million passengers in 2014 (up 3.1% on 2013), with overseas visitors making up 95% of the total. Guests in hotel accommodation⁴ totalled 3.4 million spending 16.9 million nights in 2014. AHETA estimates that, considering second homes, the Algarve received about 5.5 million tourists during 2014, equivalent to more than 30 million overnight stays.

The leading source markets for hotels in the Algarve are: the United Kingdom and the domestic Portuguese market both with close to 1 million guests in 2014 though with British guests generating the most nights i.e. 5.6 million as against 4 million. Next in order of significance are: Germany with a quarter of a million guests spending 1.8 million nights, Spain – 240 guests but a relatively low 763,000 nights, the Netherlands – 171,000 guests but a high average length of stay of 10 nights, and Ireland – 149,000 guests spending 896,000 nights.

¹ UNWTO Tourism Highlights 2015

² <http://www.statista.com/statistics/398360/number-of-international-visitors-and-overnight-stays-in-portugal/>

³ Travel and Tourism Economic Impact 2015 Portugal

⁴ AHETA Balanco do Ano Turistico 2014 – Perspectivas 2015. Excluding local accommodation, rural tourism and manor houses

There are over 100,000 beds in hotels and other forms of commercial accommodation in the Algarve. The seasonal pattern of hotel demand is highly skewed towards the period June, July and August. Average annual room occupancy has been between 51 and 58% over each of the last seven years, with the 80% plus rates in the peak summer months compensating for the below 30% levels of occupancy in the November to February period.

Determinants and Trends of Algarve Tourism: Tourism to the Algarve has shown steady growth since the global financial and economic crises of the 2008/9 period. Between 2010 and 2014, airport passenger movements rose by an average annual rate of 3.5%, hotel room occupancy increased from 42.5% to nearly 47%, and most major source markets – with the exception of Germany which has plateaued – have increased their visitor flow to the Algarve.

The Algarve's tourism product offering has stayed constant i.e. fine beach resorts with excellent summer season weather, attractive landscapes and a strong cultural heritage – both historic and modern, manifested through an excellent range of restaurants.

The large expatriate population in the Algarve – 58,743 in 2013 – has a significant impact on international tourism as family and friends resident abroad travel to the area to make visits.

The principal diversification to the established beach resort tourism market in recent years has been the strong move into the golf market. This has been one of the drivers of the recent growth of tourism in the Algarve and has been responsible for some modification of the skewed seasonal pattern of tourism by attracting golfers in shoulder season months.

There are 25 golf courses in the region, 16 of which are full 18-hole courses. Capacity has doubled in the last 15 years. Golf demand in the Algarve exceeds 1 million rounds a year, the principal months being outside the high season months of July and August when the summer heat acts as a deterrent. Awarded the accolade by IAGTO as the best tourist golf destination in Europe, the Algarve has been successful in promoting itself on the basis of the additional features it offers, rich gastronomy, mild climate and natural landscape, accessibility and infrastructure and strong marketing investment and other inducements such as low green fees prices and the creation of special "package" incentives. An example is the October 2015 Telegraph BMW Junior Golf Tournament at Quinta de Lago which Monarch Airlines jointly promoted.

A number of high visibility tournaments are held in the Algarve, both at the amateur level - European Seniors Champions Cup, the Nations Cup, Algarve Golf Trophy, Edga Algarve Open 2014 Annual Conference the PGA's of Europe, Oceanico World Kids Golf, Vilamoura Grand Trophy – and at the professional level - the Portugal Masters 2014, held at the Oceanico Victoria Golf Course. Despite poor weather it attracted 26,000 visitors, and received 1,939 hours of international television broadcasting.

2.2. Adventure Tourism Market and Trends

The Adventure Travel Trade Association (ATTA) defines adventure tourism as a trip that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion. Though cycling and walking tours are not defined as adventure activities by ATTA, though hiking is categorised as a “soft” adventure activity, these activities have many of the same characteristics and motivations as those activities that are designated as adventure activities; and, furthermore, it is apparent that many adventure tourists seek to combine a range of activities in their trips, including cycling and walking.

Overall adventure travel activity – both “hard” (requiring a level of skill and/or to which is attached a degree of risk) and “soft” – amounts to 150 million travellers from the three main source regions of North America, Latin America and Europe. On average, one-in-four of international trips taken from these three regions are “soft” adventure trips, with 43% of Europeans indicating that they would take a “soft” adventure trip on their next holiday.⁵

Key trends identified in the 2014 UNWTO report on adventure tourism⁶ are:

- 79% of tourism boards reported that the adventure tourism private sector had begun to emerge and/or grow in their destination⁷,
- there is occurring a trend towards “disintermediation” i.e. the removal of the middle-man—a tour operator or travel agent—who has traditionally connected the consumer in the source market to the provider or ground handler in the destination market. This is in response to the traveller increased ability to access information and trusted consumer reviews online leading to more direct bookings with the provide,
- cycling tourism is on the rise across the world, with an increasing number of adventure tourists embarking on both road and mountain biking tours, and participating in cycling events. The European Cyclists Federation says that cycling brings in over EUR 44 billion annually to the continent, resulting from 2.3 billion people cycling,
- backpacking, trekking, and hiking are all forms of exploring destinations on foot, often on a budget. Like cycling, these types of adventure activities are on the rise. The Adventure Pulse: USA Adventure Traveler Profiles confirms that these are the most popular activities for the United States of America adventure travellers⁸,

⁵ Adventure Tourism Market Report. George Washington University School of Business, Adventure Travel Trade Association, Xola Consulting. 2010.

⁶ Global Report on Adventure Tourism. Adventure Travel Trade Association. UNWTO. 2014.

⁷ Adventure Travel Trade Association (2011), Industry Snapshot 2011, ATTA, Seattle.

⁸ Adventure Travel Trade Association (July 2014), AdventurePulse: USA. Adventure Traveler Profiles, ATTA, Seattle.

- among students and youth travellers, cultural adventure activities tend to be the most popular, followed by activities in nature. In terms of trends, walking/trekking activities have increased globally over the past few years—18.7% of respondents indicated that they participated in these activities in 2007, increasing to 48% in 2013⁹,
- adventure travellers are less sensitive to deficiencies in hard tourism infrastructure, such as airports and paved roads, but are perhaps more sensitive to soft infrastructure, such as signage, good guide training, and clean trails,
- adventure destinations must also have policies in place that protect the three assets that adventure tourists value most—natural, cultural, and adventure resources.

2.3. Cycling Tourism

2.3.1. European Demand, Profile and Trends

Overall Market Demand: The sole European-wide study of the cycling market is the 2012 report *The European Cycle Route Network Eurovelo* published by the Directorate General for Internal Policies. Policy Department B: Structural and Cohesion Policies: Transport and Tourism. The total cycling market is estimated at 20.36 million trips involving an overnight stay and 2.27 billion day trips. The main destinations for overnight cycle trips were: Germany 4.6 million (23% of total European overnight cycle trips), France 4.0 million, the UK and Sweden (both at 1.2 million) with a number of countries all at or around the 1 million mark (i.e. Spain, Finland, Hungary, Italy, the Netherlands, and Poland). **Portugal generated 70,000 overnight cycle trips.** The economic value of these trips was €8.9 billion for overnight trips and €35 for day trips¹⁰. With demand for cycle tourism rising at between 2-4% a year¹¹, bringing these figures up-to-date suggests a total cycling market in 2015 of around 23 million overnight trips involving expenditure of €10 billion.

The cycle market is predominantly domestic, typically between 90 and 95%¹², and primarily about independent travel. However, the range of cycle holidays available illustrates a wide market spread for what might be termed “lightly packaged” tours, where the client has travel and accommodation booked, with transfers, a cycle and an information pack provided by a local operator in the destination. Specialist tour operators offer cycling holidays in many European countries and in some cases in long haul destinations. Examples are given in the Directorate General for Internal Policies 2012 report¹³. Of the 58 companies listed, eight operated cycling holidays to Portugal, the most popular destinations being France, Austria and Spain.

⁹ WYSE Travel Confederation *New Horizons* report, 2013

¹⁰ *The European Cycle Route Network Eurovelo* published by the Directorate General for Internal Policies. Policy Department B: Structural and Cohesion Policies: Transport and Tourism. 2012.

¹¹ *Ibid*

¹² *ibid*

¹³ *ibid*

The size of the German overnight cycle tourism market was 6 million in 2010, while for the Netherlands it was just under 1 million in 2012. Corresponding data are not reported for other main source countries. As noted, the great bulk of these overnight cycle trips were taken within their own country.

Despite the significant volumes, cycling tourism still constitutes a small proportion of total holidays taken by Europeans. A 2009 internet survey of 348 cycle tourism experts reported in the Directorate General for Internal Policies 2012 report¹⁴ found that the highest ratio of cycle holidays to all holidays was recorded in the Netherlands (at 3.7%), followed by Germany, Austria, Hungary, Switzerland, Belgium and the Scandinavian markets (all at 3%). Of other main markets to the Algarve, the UK and Ireland cycle holiday share of total holidays is 1%, while for Spain and domestic Portuguese holidaymakers it is 0.5%.

With at least 90% of overnight cycling trips being taken in their own country, the level of overseas cycling holiday trips taken by Europeans is estimated at 2 million a year currently.

Overall Cycling Holiday Profile and Motivations: The following generalised profile of Europeans taking cycling holidays is based on an analysis of eight market studies from five countries¹⁵:

- Average age: 45 – 55,
- Male 60%, Female 40% but more even shares for day excursions,
- Education level: secondary education and significant minority university education and professional status,
- Group composition: alone 20%, two cyclists 50%, small groups of three to five persons 20%, larger groups 10%,
- Household income: wide range with €24,000-36,000 in the German market in 2010.

Most studies show the primary motivation is enjoyment from an activity that is relaxing and healthy. Other core motivations are being close to nature and the ability to explore other places and landscapes, with cultural heritage also ranked as a motivating factor of some, albeit lesser, significance¹⁶.

Segments: The overnight cycling market divides into three broad segments:

- **road cycling** where the activity is more important than the destination,
- **touring cycling** where the destination and the activity go hand in hand, and
- mountain biking

¹⁴ Ibid

¹⁵ Ibid

¹⁶ Ibid

Figure 3: Overnight Cycling Market Segments

	Road cycling sportive sub-segment	Road cycling enthusiast sub-segment	Touring cyclist
Motivation	Performance driven	Activity prime importance	Additional features of destination to complement cycling e.g. food and wine, culture, nature
Travel party	Individuals and groups e.g. clubs	Groups of friends, couples and club mates	Full range - couple, friends, family – according to degree of difficulty of route
Pattern of usage	Point-to-point, or centre based	Pick from well-known routes, point-to-point or centre based	Popular routes to familiar destinations that may have been visited previously. Guided or self-guided, both point-to-point and centre-based. Cycling often combined with another activity e.g. canal boating
Arrangements	Mainly FIT	Majority book direct, with tour operator used for holiday trip organisation	Range of booking arrangements

Source: consultations with European cycling operators

Seasonality: Studies in Germany and the UK indicate that for cycle tourists the main season is from May until the end of August – the summer months. This reflects the preponderance of northern European markets in the study and the fact that the great majority of cycling tourism is domestic, with the colder and wetter winter climates in these countries deterring trips outside the summer.

Length of Stay: Analysis of the Trendscape 2008¹⁷ study indicates that 30% of all German cycle tourists take short breaks (i.e. two-to-four days) but that 62% make longer trips of five to 14 days and 8% enjoy longer stays of 15 days or over.

Accommodation: The preferred forms of accommodation for overnight cycling tourists are evenly split between hotels and other forms of commercial accommodation (i.e. inn, guest house, B & B, farmstay), with smaller volumes in private rooms/relatives, youth hostels and other forms (including holiday homes and self-catering)¹⁸.

¹⁷ Ibid

¹⁸ Ibid

2.3.2. Cycling Tourism in the Algarve

The market segmentation analysis below is drawn on extensive consultations with key stakeholders and the international and local trade survey undertaken by Tourism Development International as part of this project.

Market Segmentation Analysis: Relevant market segments for the Algarve are identified according to:

- Type i.e. road cycling, touring and mountain bike,
- Travel party i.e. groups & individual enthusiasts,
- Source markets according to their needs and preferences

Road cycling and touring cycle market segments are based on; degree of capability/experience/seriousness; main markets; focus of interest and types of activity; method of organisation; accommodation in the Algarve.

- **Road cycling 1 - Pro/serious amateur teams:** Northern European; training camps; race events; long circuits; organised by teams using local agents; stay in hotels as long as access to kitchen for own meal preparation, or self-catering in villas etc.
- **Road cycling 2 - Groups of dedicated enthusiasts:** European; longer circuits; spectator race events; organised by specialist international or local tour operators; most stay hotels, some self-catering villas.
- **Touring - Enthusiastic amateur 1:** Continental European markets; focus on nature; mix of short and longer circuits; spectator race events; organised through specialist international or local tour operators; great majority stay hotels or hostels.
- **Touring - Enthusiastic amateur 2:** North American markets; focus on culture; mix of short and longer circuits; stay in good quality hotels.
- **Touring - Enthusiastic amateurs 3:** GB/Ireland markets; mix of nature and culture; mix of short and longer circuits; great majority stay in hotels or hostels.
- **Summer sun/sand/sea tourists:** European. Small percentage engage in short circuits, no more than 1 – 3 hours; most stay in hotels, some self-catering units.

For the **enthusiastic amateur touring** segments, it is important to note that:

1. The relatively limited number of cultural sites and monuments compared with other regions of Portugal necessitates an emphasis on the Algarve's good food and wines, and its natural beauty, to complement the activity, and
2. An increasing number make their own reservations via the internet and do not use the intermediary channels

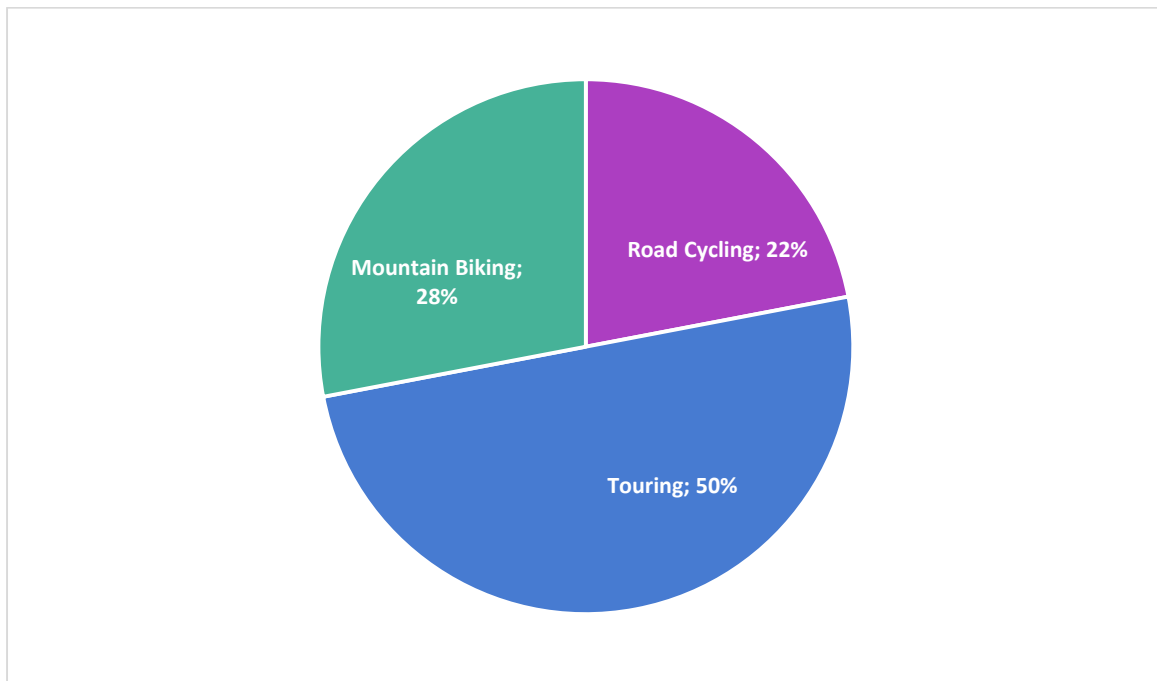
Mountain biking market segments:

- **Groups of dedicated enthusiasts:** European. Specially constructed trails; organised by specialist international or local tour operators; most stay hotels, some self-catering units.

- **Enthusiastic amateur:** European. Specially constructed trails; organised through specialist international or local tour operators; great majority stay hotels or hostels.
- **Leisure tourists** who use a 1 to 3 hour mountain bike ride as an extra activity to a general holiday, staying at accommodations that provide bikes and dirt trails close by e.g. Turismo de Habitação, Herdade do Touril in Costa Vicentina, and Aldeia de Pedralva in west Algarve.

The survey of local trade carried out by TDI indicated that 50% of cyclists are here for touring, 28% for mountain-biking and 22% for road-cycling as shown in Figure 4 below.

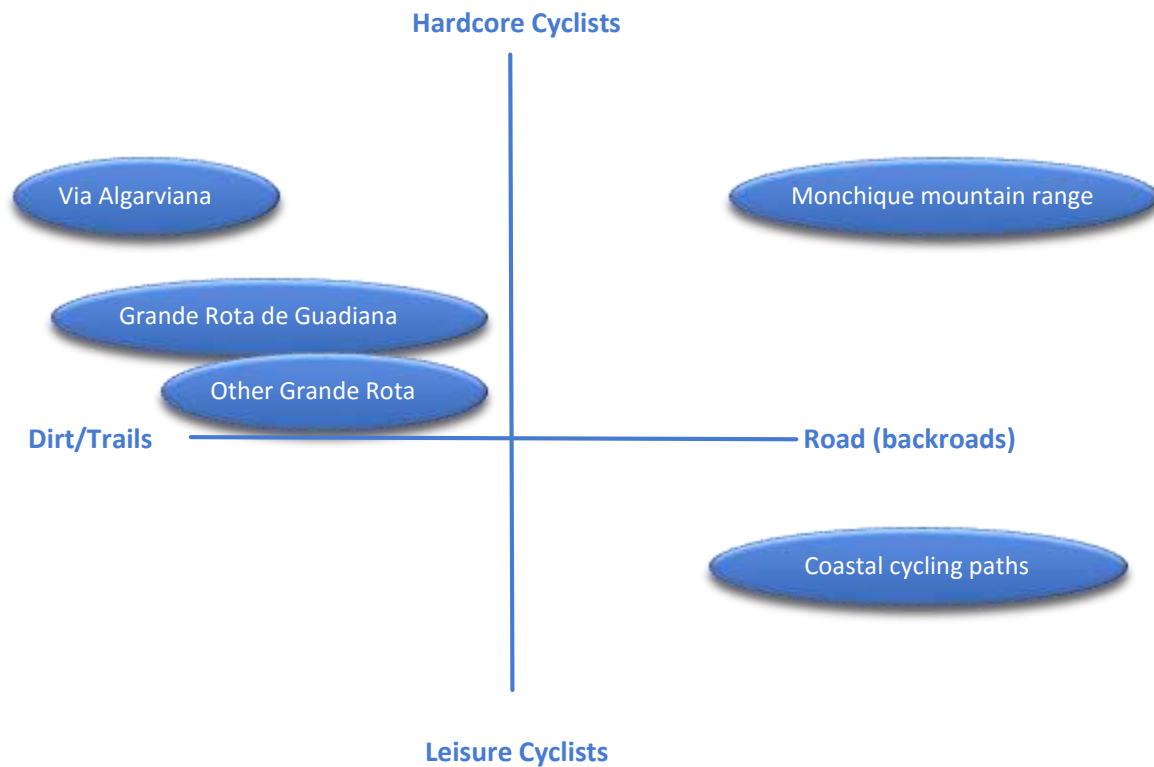
Figure 4: Cycling Market Segmentation



Source: Local Trade Survey

Product:market matching for cycling can be undertaken by relating the two broad categories of hard-core and leisure cyclists by the types of trail they prefer. The analysis in the graphic below indicates that those cyclists engaged in professional and other hard-core cycling itineraries will be concentrated on the Via Algarviana, Grande Rota de Guadiana and similar trails as well as road routes through the Monchique mountain range. By contrast, leisure, soft adventure cyclists will be concentrated on coastline cycling paths and roads linking the coasts and the inland trails.

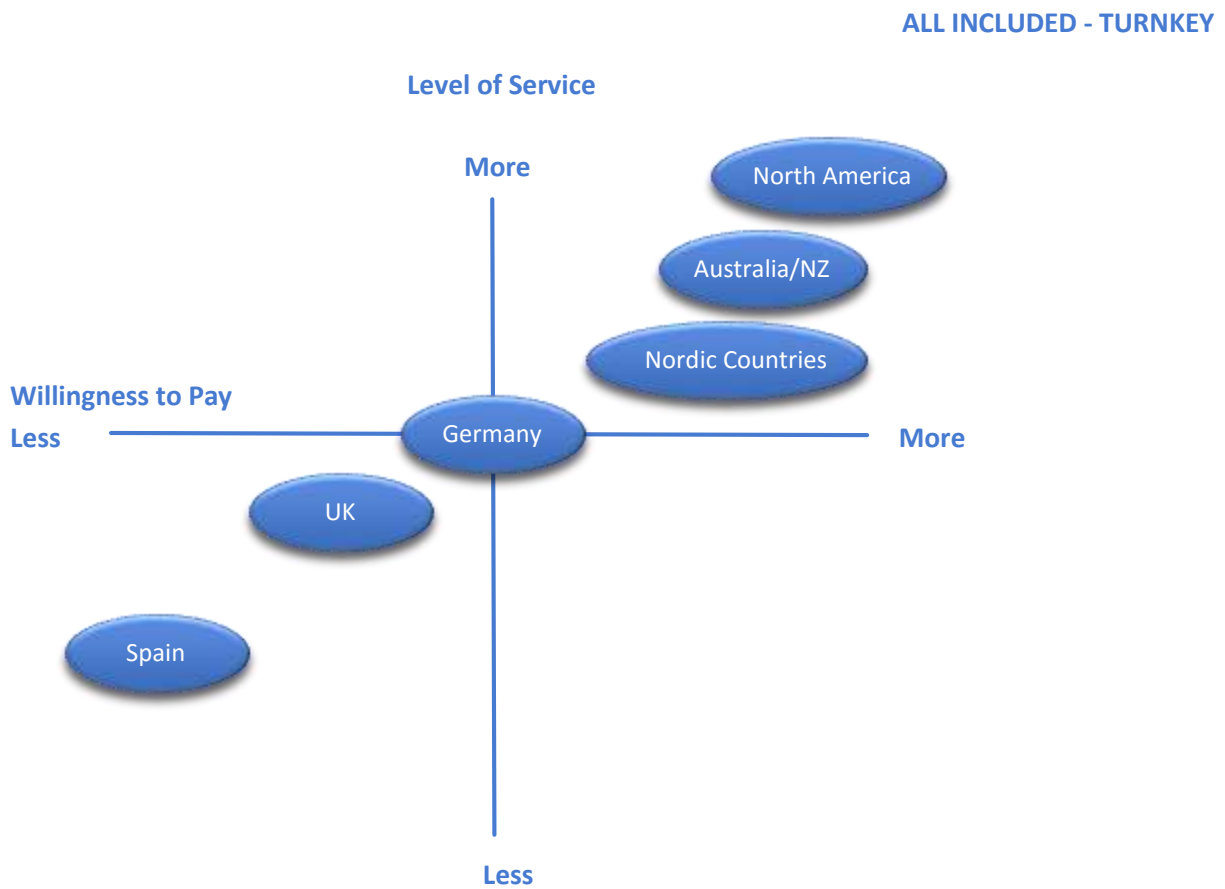
Figure 5: Segmentation by Level of Difficulty and Trail Types



Another way of segmenting the touring market of “groups of dedicated enthusiasts” and “enthusiastic amateurs” is by relating level of service required by source market and travel arrangement. There is a rough correlation between the level of service required and the distance of the source market from the Algarve. Guided tours, including hotels and restaurants, constitute a small proportion of the market – most notably among North Americans – but have a high value because of these customers’ preparedness to pay for this greater level of service. Cyclists from the Australasian markets – again small in volume terms – also exhibit a preference for fully organised itineraries. Cyclists from the Nordic countries are split between those wanting all-inclusive arrangements with guides and those wanting to tour on their own but with hotels and restaurants included.

Germans typically want some items included while cycling independently and show a moderate level of price sensitivity. The most independent cyclists who tour on their own having made their own arrangements through the internet seeking out the best deals are other Europeans, particularly from the UK and neighbouring Spain. These represent the highest volume but relatively lower per capita spend in the Algarve.

Figure 6: Segmentation by Source Market and Service Level Requirement



ON YOUR OWN - ADVENTURE

Source Markets: The source market split by cycling category as indicated by the TDI survey of local operators for cycling tourism shows that the UK, the Netherlands and Germany are the three leading markets for cycling tourism to the Algarve, with other important sources being Ireland and Scandinavia

2.4. Walking Tourism

2.4.1. European Demand, Profile and Trends

Market Demand: Though there is no Europe-wide study analysing the scale and trends in walking holidays, evidence at a national level indicates both that the incidence is growing and more destinations are recognising the opportunities to combine culture and nature with walking. There are both operators that specialise in the harder forms of trekking and hiking at one end of the scale and others that feature what they term “slow walking” at the other end. Examination of the developments and prospects of walking tourism among key European source markets based on research undertaken by the British and Irish tourism authorities are outlined below.

UK residents' trips to Europe have experienced gradual growth since 2010 and represent the lion's share of overseas holidays, according to a YouGov report, 'Activity and Adventure Holidays'¹⁹. European holidays taken by UK residents stood at 29 million trips in 2012, representing 81% of total overseas holidays taken.

For holidays taken in the last five years, walking and rambling vacations are the most popular activities among the respondents (both in the UK and overseas). A high proportion of domestic holidaymakers also favour hiking and cycling trips, while for those travelling abroad, overland tours and wildlife adventure trips are also popular.

- 52% of respondents have taken a walking/rambling holiday in the UK in the last five years, while 27% have done so overseas.
- 26% of respondents have taken a hiking/trekking holiday in the UK while 21% have done so overseas.
- 17% of respondents have taken a cycling/mountain biking trip in the UK compared with 10% doing so overseas.

Ireland has studied the scale and behaviour of the overseas walking market in detail. In 2011, 740,000 overseas visitors to the Republic of Ireland claimed to have gone hiking/cross-country walking spending approximately €649 million. Around a third of these visitors stated that walking was an important factor in their choice of Ireland as a holiday destination (225,000). Of this 740,000 visitors, 78% used walks which start and finish at the same location (in a loop), 79% walked for <10km and only 10% were accompanied by guides²⁰. Fáilte Ireland research in 2013 found that the 'core1' market potential opportunities and challenges for the walking offer in Ireland from the four major markets of the UK, Germany, France and the Netherlands were²¹:

- Walking offers the highest potential of any activity for Ireland for both domestic and overseas markets.
- Germany, Britain and France each offer a 'core' market potential of more than 8 million people, and the domestic market has an 'core' potential of 1.5 million people or 33% of the population.
- In both overseas and domestic markets interest in walking is much more definite than for other activities and intentions are somewhat firmer, making them somewhat easier markets to convert.
- One of the biggest challenges for Ireland will be to get people to travel outside their own country to for these activities.
- **BRITAIN:** England (86%), Scotland (79%) and Wales (78%) provide the greatest competition for walking holidays, 71% would consider an Irish walking holiday.
- **FRANCE:** France (89%), Spain (69%) and Italy (66%) are the main destinations for walking, and 54% would consider Ireland for a walking holiday.

¹⁹ Market intelligence: Activity and adventure holidays. September 2013.

<https://yougov.co.uk/news/2013/09/27/market-intelligence-activity-and-adventure-holiday/>

²⁰ Profile of Overseas Visitors who went hiking/hillwalking in 2011. Fáilte Ireland.

²¹ Walking Market Research 2013. Fáilte Ireland.

- **GERMANY:** Germany (90%), Spain (71%) and Italy (69%) provide the greatest competition, with 63% of the core potential market considering Ireland for a walking holiday in the next three years
- **IRELAND:** about half (46%) of respondents who have taken a holiday or break overseas in the last two years have engaged in walking during that holiday

Walking Holiday Profile and Motivations: The profile of the visitor to Ireland engaging in walking is mainly drawn from the higher socio-economic groups, spread across all ages but more males than females.

A 2014 study of the market for hiking in Germany, though focussed on the domestic patterns, gives some guidelines on the potential for overseas walking holidays²². It finds that the overriding motivation for Germans to take a hiking trip is to experience nature (75%). The five hiking target groups identified in the study are:

- Golden years (aged 50 – 65),
- Singles/couples without children (30 – 49),
- Elderly people (over 65),
- Families with at least one child over 14, and
- Young people with no children under 14.

2.4.2. Walking Tourism in the Algarve

Market Segmentation Analysis: Walking market segments based on: degree of capability/experience/seriousness; main markets; focus of interest and types of activity; method of organisation; accommodation in Algarve.

- **Groups of dedicated enthusiasts:** European & North American. Longer trails. Organised by specialist international or local tour operators. Most stay hotels, some self-catering villas.
- **Enthusiastic amateurs 1:** Continental European markets. Focus on nature. Mix of short and longer trails. Organised through specialist international or local tour operators. Great majority stay hotels or hostels.
- **Enthusiastic amateurs 2:** North American markets. Focus on culture. Mix of short and longer trails. Stay in hotels.
- **Enthusiastic amateurs 3:** GB/Ireland markets. Mix of nature and culture: mix of short and longer trails. Great majority stay in hotels or hostels.
- **Summer tourists:** European. Beach Plus tourists – up to 10 to 20% - looking for ways to experience the environment and culture of the areas in which their resorts are based through short (1 – 3 hour) town walks, boardwalks etc. Most stay in hotels, some self-catering units.

²² The market for hiking in Germany. PROJECT M gmbH/Ostfalia University of Applied Sciences/Institute of Management and Tourism/ Deutscher Wanderverband. 2014

Enthusiastic amateurs (both for cycling and especially for walking) travel to the Algarve independent of operators, preparing their itinerary and booking their hotels through the internet. This is the segment that places the highest value on good maps and signposting on the routes, since those travelling via operators have the maps provided.

Source Markets: The source market split of walking tourism to the Algarve as indicated by the TDI survey of local operators shows that the Netherlands, Germany and the UK are the three leading markets for cycling tourism to the Algarve, together accounting for two-out-of-every-three walking tourists to the area.

2.5. Conclusions

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.

2.5.1. 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,
- 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,
- Cycling tourism in the Algarve mirrors the overall European pattern except that demand is mainly in the spring and autumn months,
- The UK, the Netherlands and Germany are the principal source markets for cycling tourism to the Algarve,
- It should be recognised that the implementation of a detailed product development and marketing action plan in support of cycling tourism in the Algarve will:
 1. **generate additional volumes of visitors whose primary purpose in coming to the area is for cycling; AND**
 2. **attract visitors whose interests are more broadly based, but for whom the cycling product availability and marketing support will, in combination with the Algarve’s other assets such as cultural and natural heritage, sway the choice of destination towards the region.**

2.5.2. Walking

- Though there is no Europe-wide study analysing the scale and trends in walking holidays, evidence at a national level indicates both that the incidence is growing and more destinations are recognising the opportunities to combine culture and nature with walking,

- 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,
- The Netherlands, Germany and the UK are the principal source markets for hiking/cycling tourism to the Algarve, accounting for two-thirds of demand,
- As with cycling, the implementation of a detailed product marketing and marketing action plan to support walking tourism in the Algarve will:
 1. **generate additional volumes of visitors whose primary purpose in coming to the area is for walking; AND**
 2. **attract visitors whose interest are more broadly based but for whom the walking product availability and marketing support, combined with the Algarve's other assets such as cultural and natural heritage, will lead to the Algarve being the destination of choice.**

3. Market Research and Consultations

3.1. Local and International Trade Surveys, and Airline Consultations

In addition to the comprehensive desk research analysis undertaken for this project, TDI has also conducted an online survey with representatives of the tourism trade in the Algarve and in key markets, and undertaken interviews with three major airlines serving Faro.

3.1.1. Local Trade Survey

TDI conducted an online survey with representatives of the tourism trade in the Algarve. The survey, which was launched on Friday 16th October 2015, and was completed on 20th November 2015. 90 interviews were conducted in total.

The sample for the local trade survey comprised the following subsectors: hotels (55 respondents), travel agencies (22 respondents), activity providers (10 respondents) and car hire companies (3 respondents).

- Cycling and Hiking currently represent very important sources of business for the tourism trade in the Algarve. Respondents to the survey indicated that 18% of their bookings are for cycling holidays. The proportion of bookings for walking holidays is even higher at 19%.
- Demand for cycling and walking in the Algarve is growing. In both cases, a majority of trade respondents report the overall percentage of bookings to be increasing.

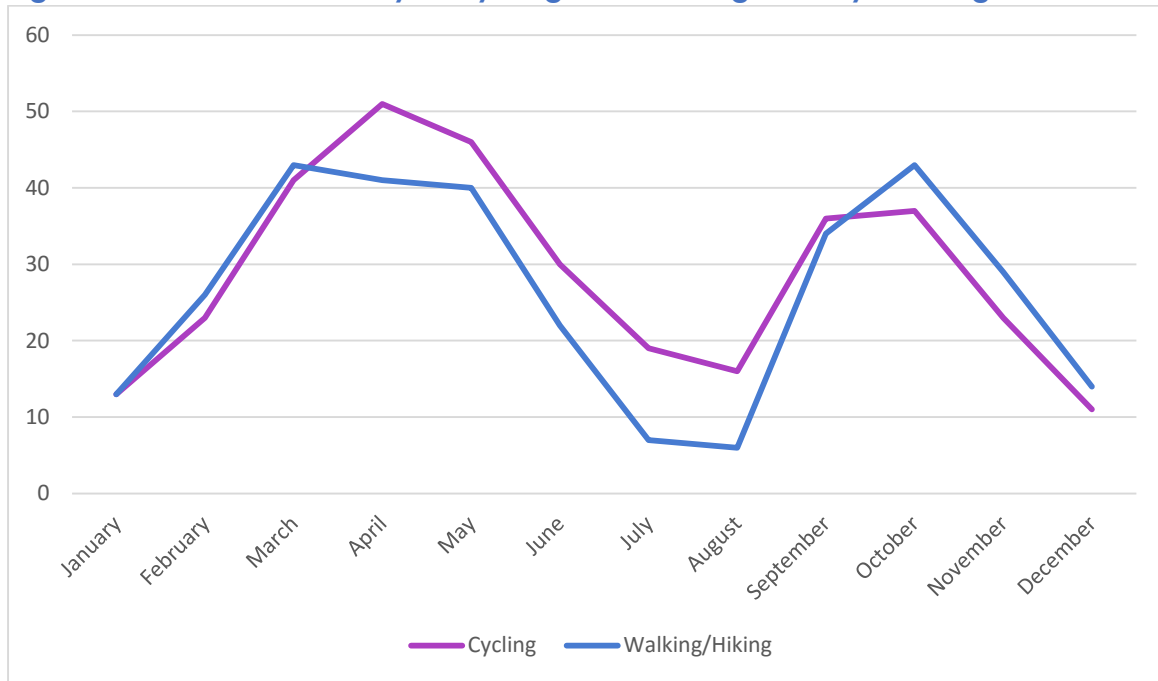
Figure 7: Percentage of Bookings for Cycling and Walking Holidays/Performance



Source: Local Trade Survey

- March, April and May along with September and October are the main months for cycling. The trade also record bookings for this activity in February and November, albeit not to the same extent as the aforementioned months.
- A similar seasonal pattern of demand is evident in respect of walking with even higher levels of demand in the early shoulder season [February] and the late shoulder [November] than is the case with cycling.

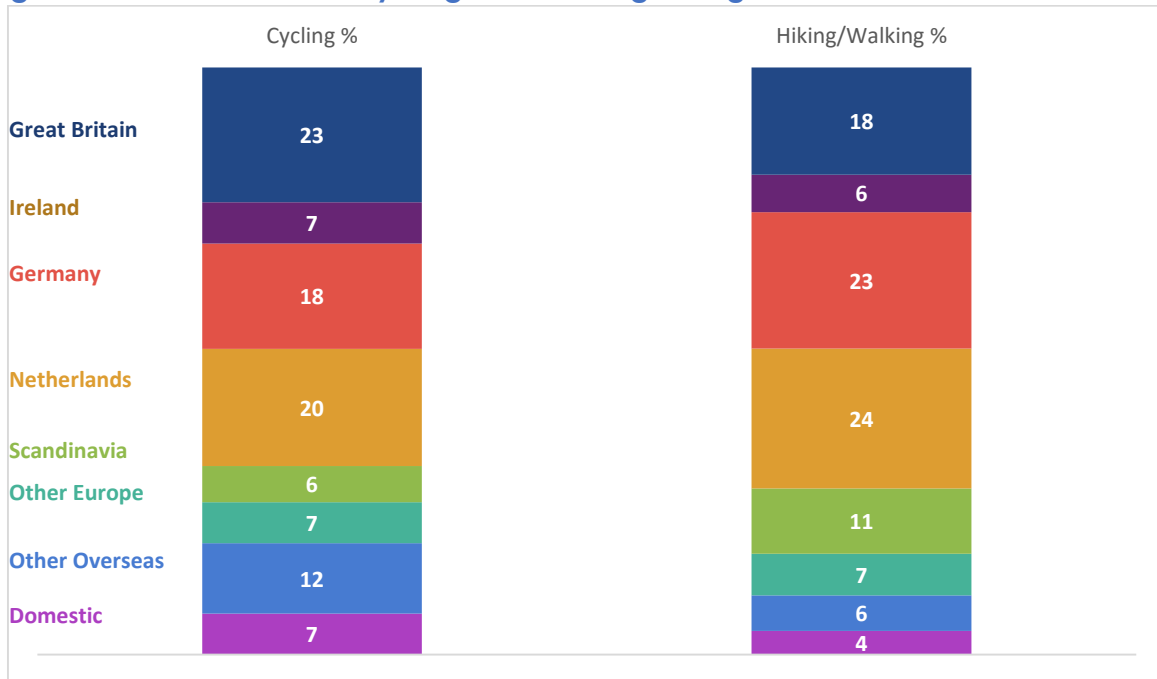
Figure 8: Current Seasonality of Cycling and Walking Holiday Bookings



Source: Local Trade Survey

- The main markets for cycling in the Algarve are Britain [23% of cycling customers], Netherlands [20%] and Germany [18%].
- Demand for walking is generated primarily from the same markets- Netherlands [24% of walking customers], Germany [23%], and Britain [18%].

Figure 9: Market Profile of Cycling and Walking Hiking Customers



Source: Local Trade Survey

- For both cycling and walking, trade respondents indicated that approximately half their customers pursuing these activities had travelled as couples. In both cases, small adult groups were cited as accounting for approximately one in five customers pursuing these activities.

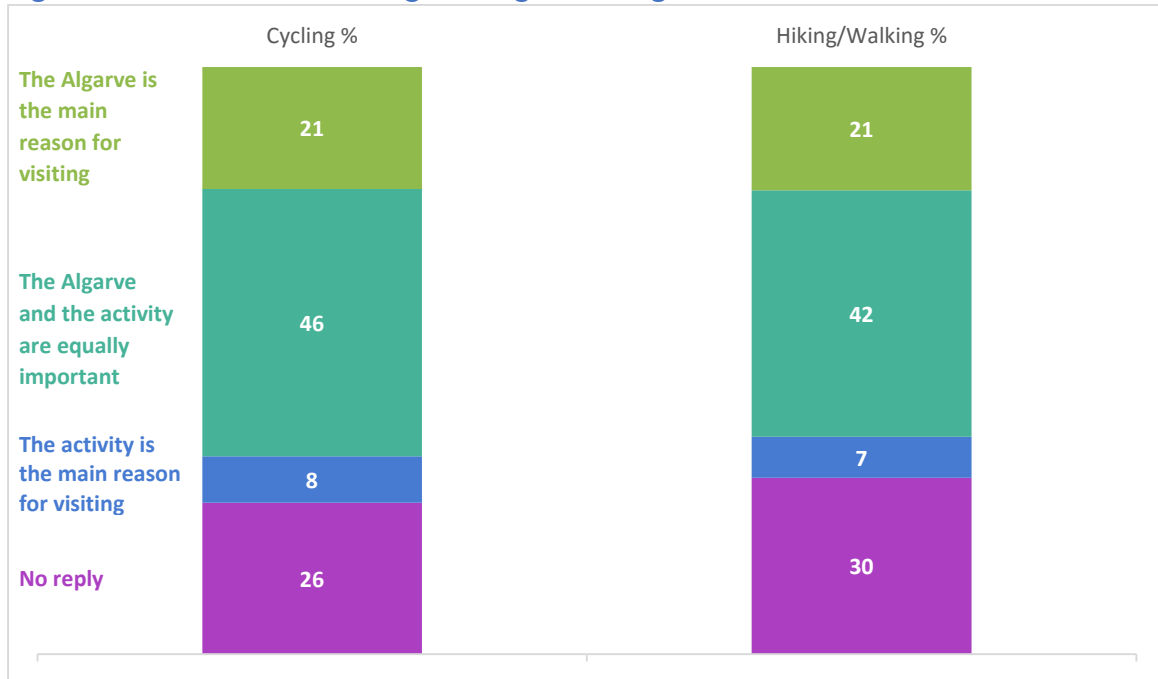
Figure 10: Demographics of Cycling and Walking Customers

	Cycling	Walking
Gender	%	%
Male	57	49
Female	43	51
Age	%	%
Under 25	4	2
26-35	15	9
36-45	28	24
46-55	26	25
56-65	21	29
65+	6	10
Party Composition	%	%
Individuals	20	15
Couples	47	58
Families	8	6
Small adult group	20	17
Other adult group	4	3
Professionals	1	<1

Source: Local Trade Survey

- In terms of reasons for visiting, for a majority of cycling and walking customers, the Algarve and the activity are equally important. It is clear from this that the Algarve offers cyclists and walkers significant added value beyond the particular activities.

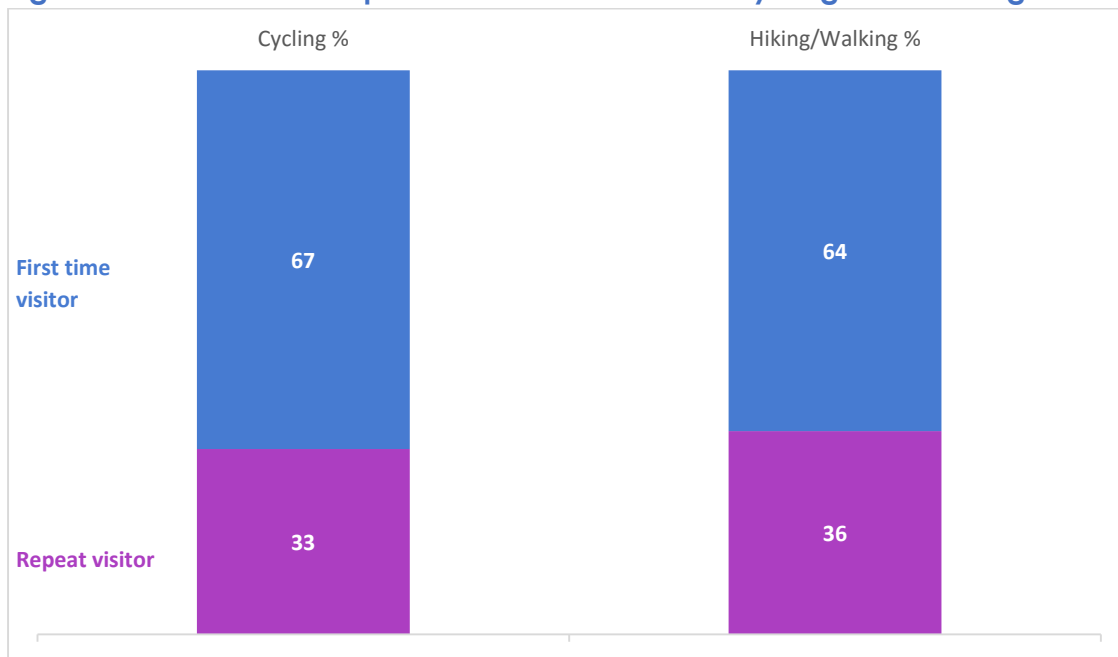
Figure 11: Reasons for Visiting the Algarve – Agreement with Statements



Source: Local Trade Survey

- Two thirds [67%] of the tourism trade's cycling customers are first time visitors to the Algarve. A similar pattern is evident in respect of walking [64%].

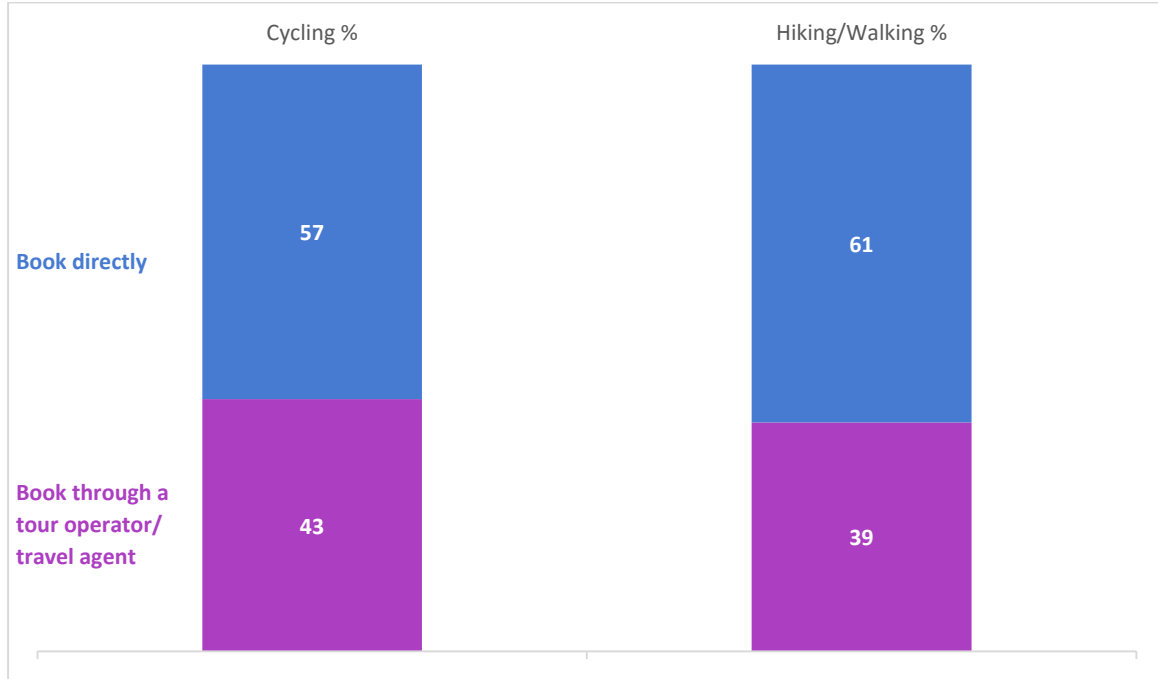
Figure 12: First Time Vs Repeat Visitation Patterns of Cycling and Walking Customers



Source: Local Trade Survey

- In terms of booking, a majority of cycling customers [57%] are reported by the trade to have booked directly with the balance [43%] having booked through a travel agent. For walking customers, the proportion of 'direct' bookings is even higher at 61%.

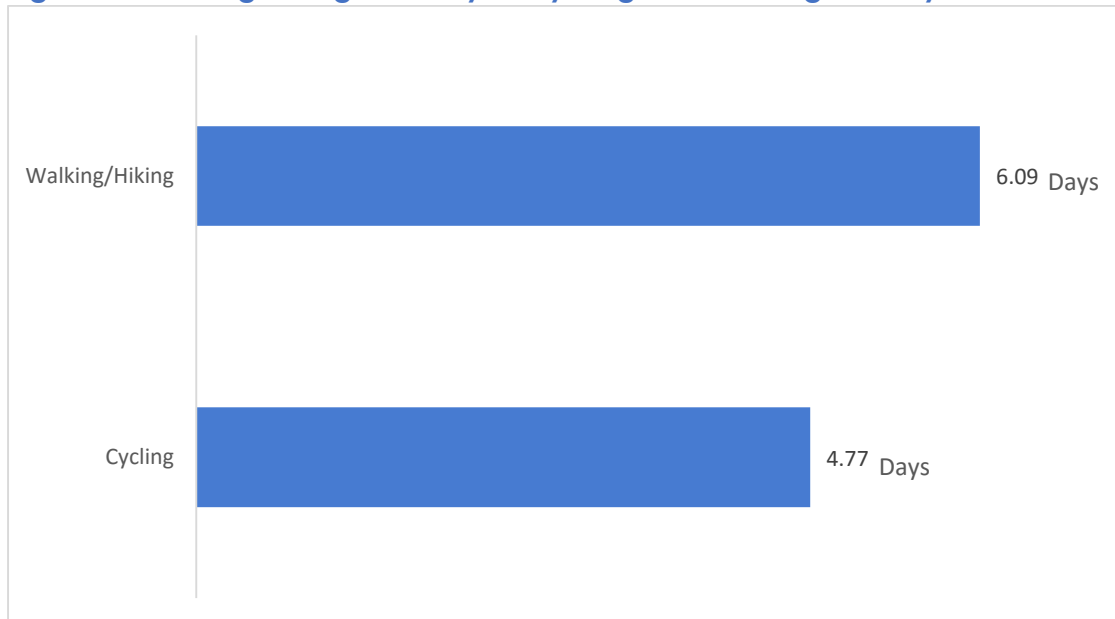
Figure 13: Method Booking Used by Cycling and Walking Customers



Source: Local Trade Survey

- Cyclists are reported to stay on average for 4.77 days. The average length of stay for walkers is higher at 6.09 days.

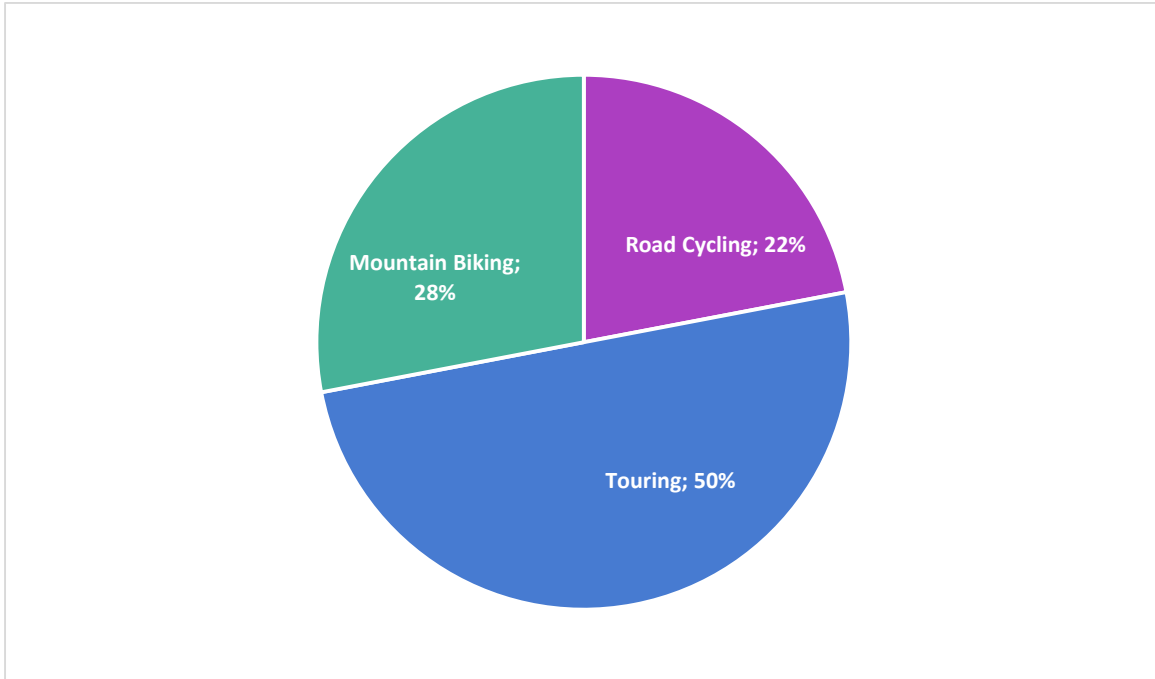
Figure 14: Average Length of Stay of Cycling and Walking Holidays



Source: Local Trade Survey

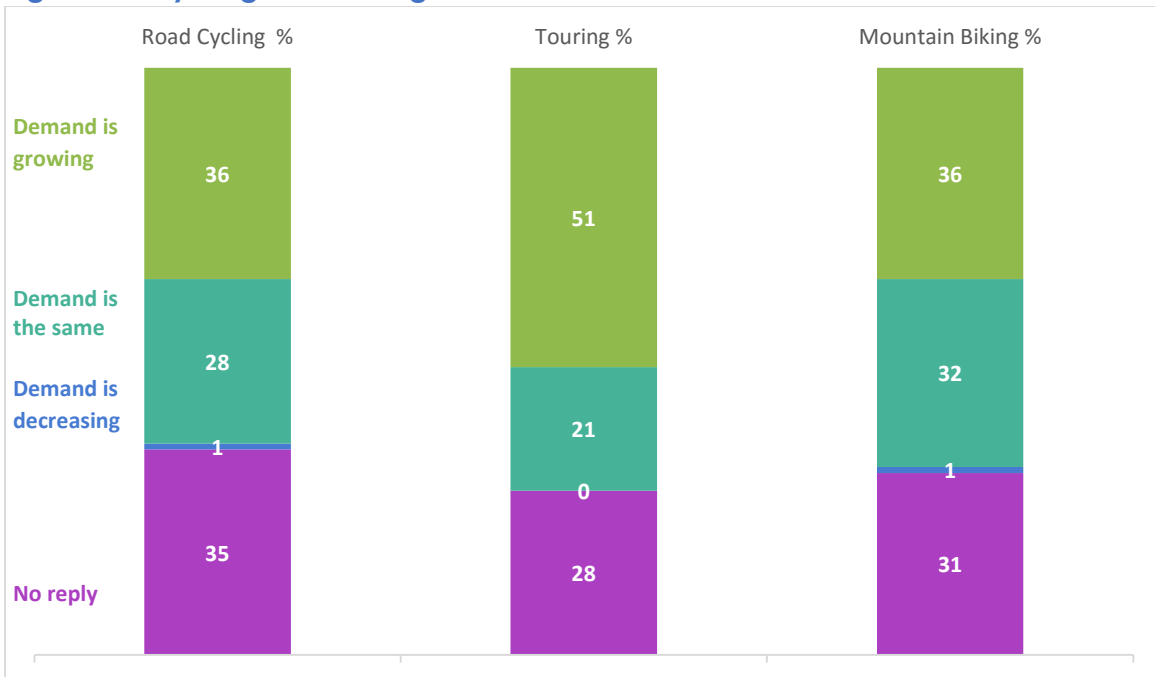
- In terms of overall participation, touring is the most popular form of cycling activity. The trade also record minority participation in mountain biking and road cycling. Demand for all three categories of cycling has grown over the last 3 years with higher proportions of the trade recording growth in touring.

Figure 15: Cycling Market Segmentation



Source: Local Trade Survey

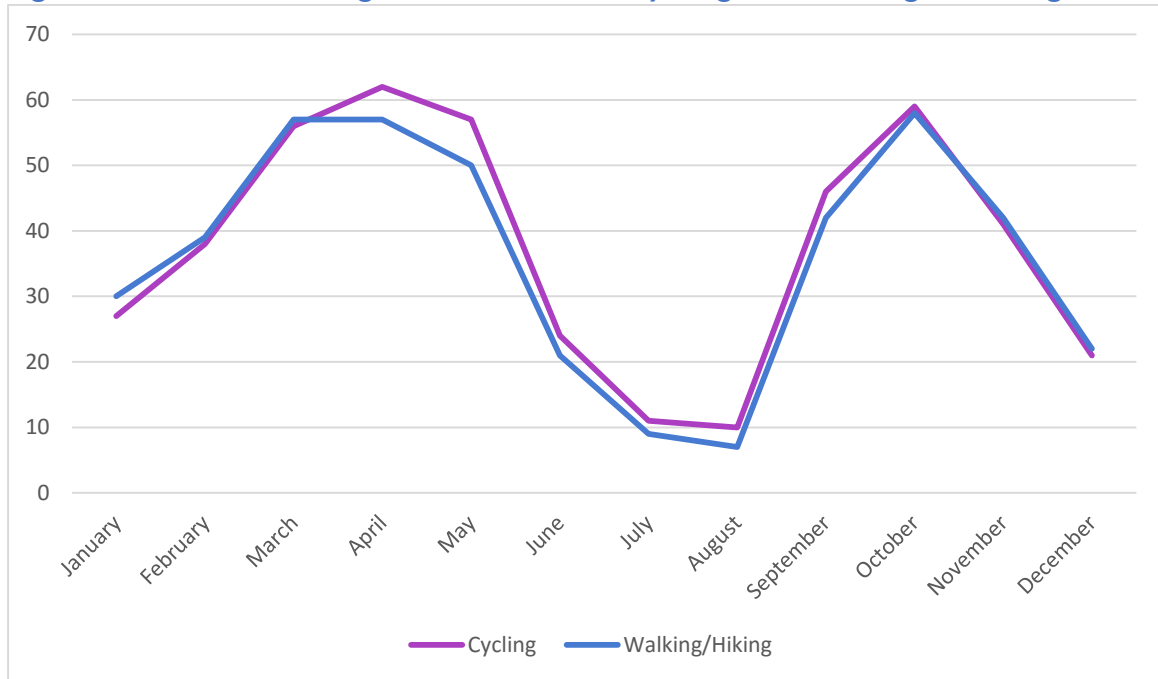
Figure 16: Cycling Market Segmentation - Trends



Source: Local Trade Survey

- Consistent with existing demand patterns, the months of March- May inclusive and September and October are seen by the local trade as offering the best potential for both activities. In fact, with the exception of July and August, all other months are cited as having potential for these activities.

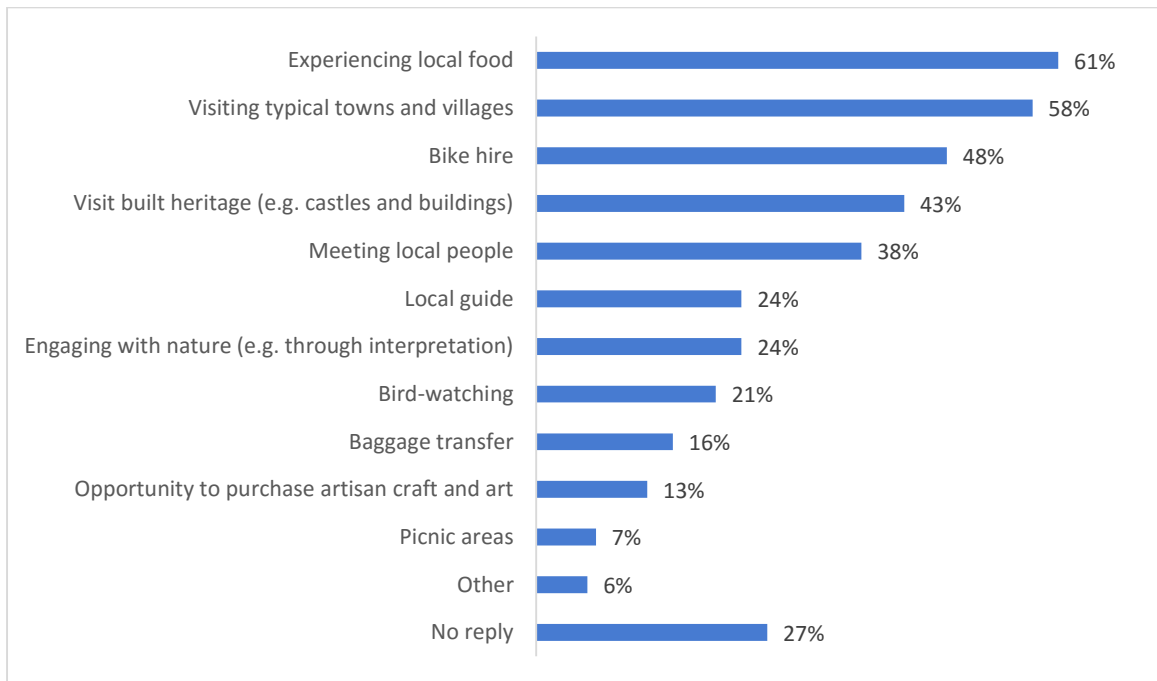
Figure 17: Months Offering Best Potential for Cycling and Walking in the Algarve



Source: Local Trade Survey

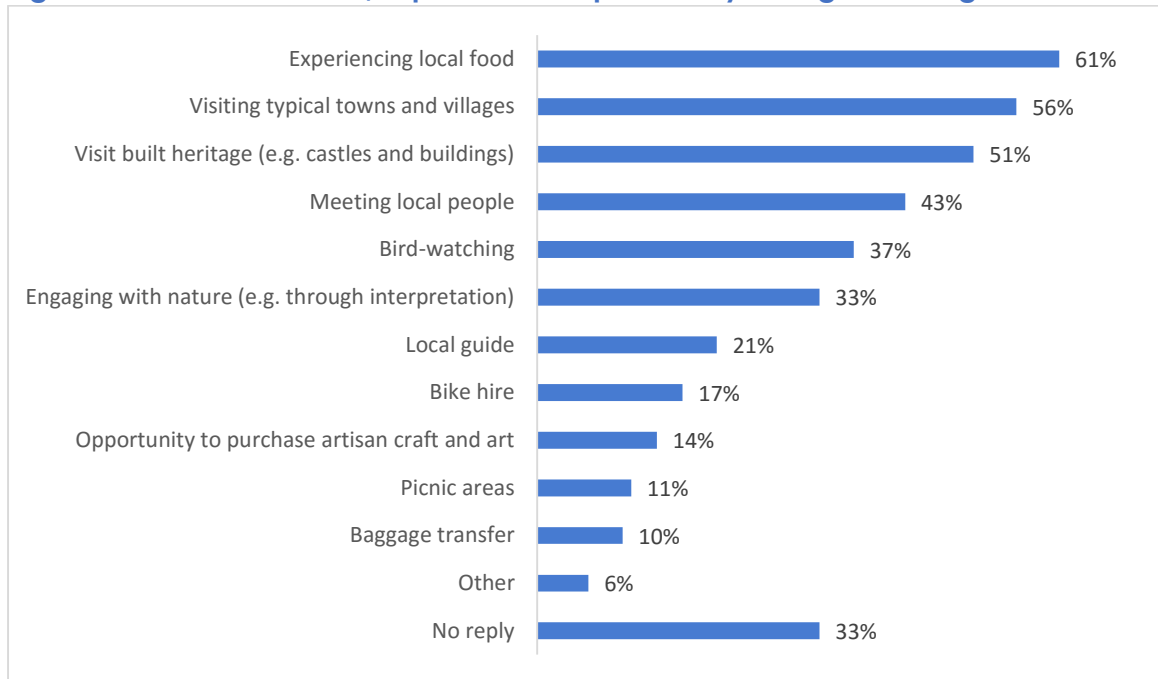
- Consistent with the findings presented in respect of motivations above, it is clear that cyclists and walkers expect a range of other activities and experiences when visiting the Algarve. Foremost in this regard are experiencing the local food, visits to towns/villages and historic sites, meeting local people, and enjoying the beautiful landscape. One third of walkers expected to participate in bird watching during their visit.

Figure 18: Other Activities/Experiences Expected by Foreign Cycling Customers



Source: Local Trade Survey

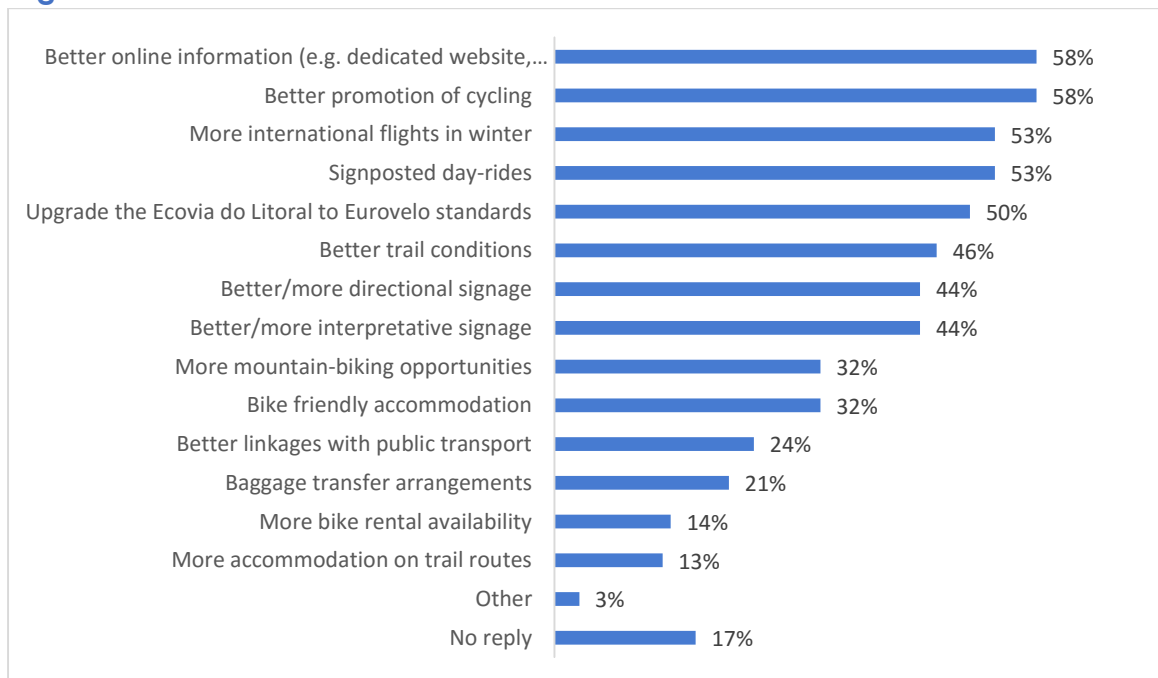
Figure 19: Other Activities/Experiences Expected by Foreign Walking Customers



Source: Local Trade Survey

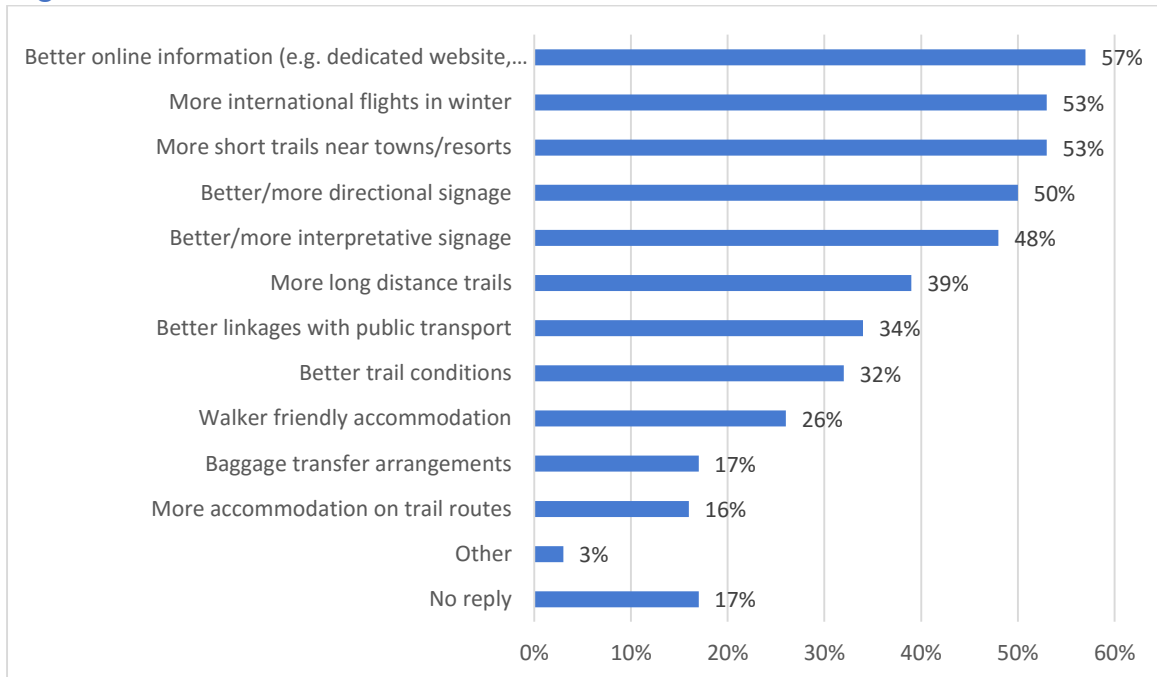
- Cycling tourism to the Algarve would be boosted by better information online and promotion, more winter season flights and signposted day rides; while walking tourism requires better information online, more winter season flights, more short trails near towns and resorts, and better signage.

Figure 20: Most Important Actions for the Development of Cycling Tourism in the Algarve



Source: Local Trade Survey

Figure 21: Most Important Actions for the Development of Walking Tourism in the Algarve



Source: Local Trade Survey

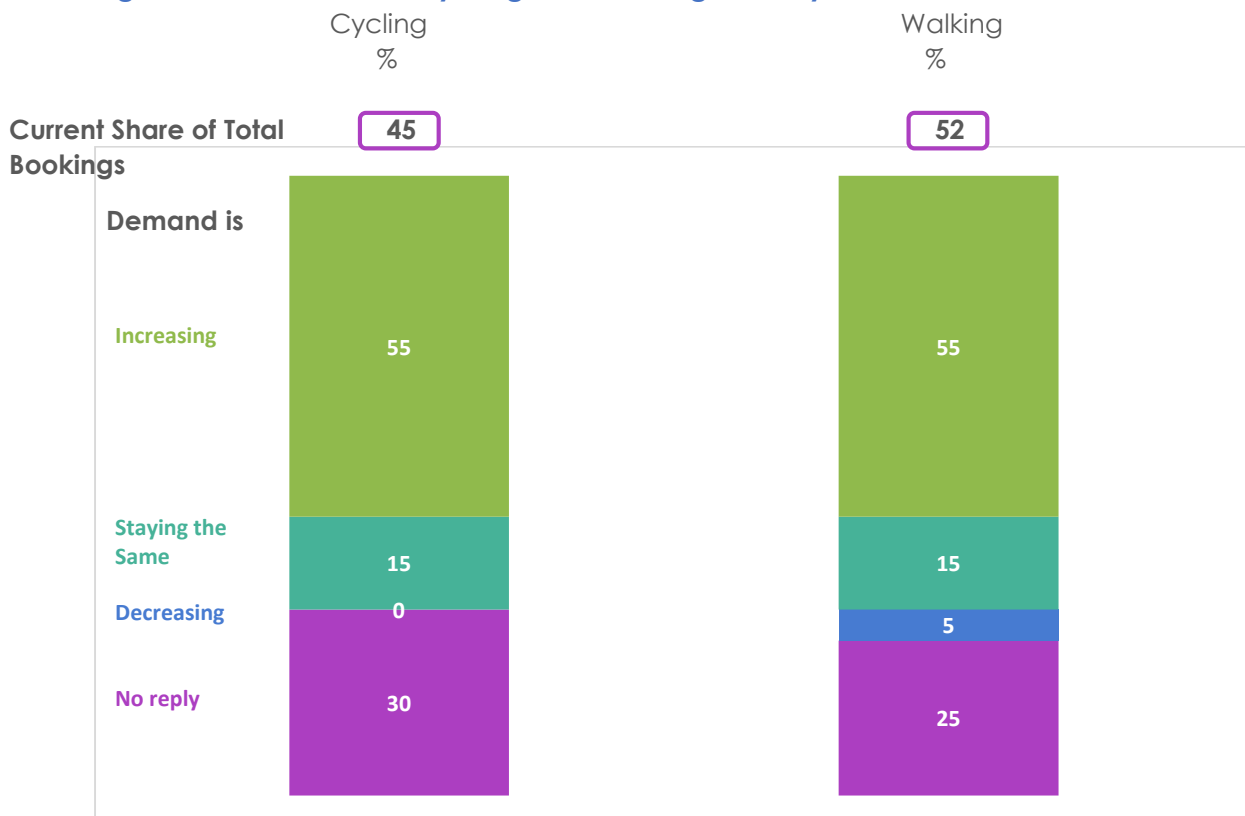
3.1.2. International Trade Survey

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 namely mainland Europe (11 interviews), Britain and Ireland (7 interviews) and the United States (2 interviews). Most of the respondents interviewed (80%) currently feature the Algarve in their programmes.

As can be seen in Figure 22 below, for these international companies, walking accounted for just over half of all customer bookings, while cycling accounted for 45% of business. In the case of both activities, respondents reported demand to be increasing.

70% of British/Irish trade representatives reported an increase in demand for walking. Where cycling is concerned, growth is particularly evident in respect of Europe, with 64% of business reporting an increase in demand.

Figure 22: Demand for Cycling and walking Holidays

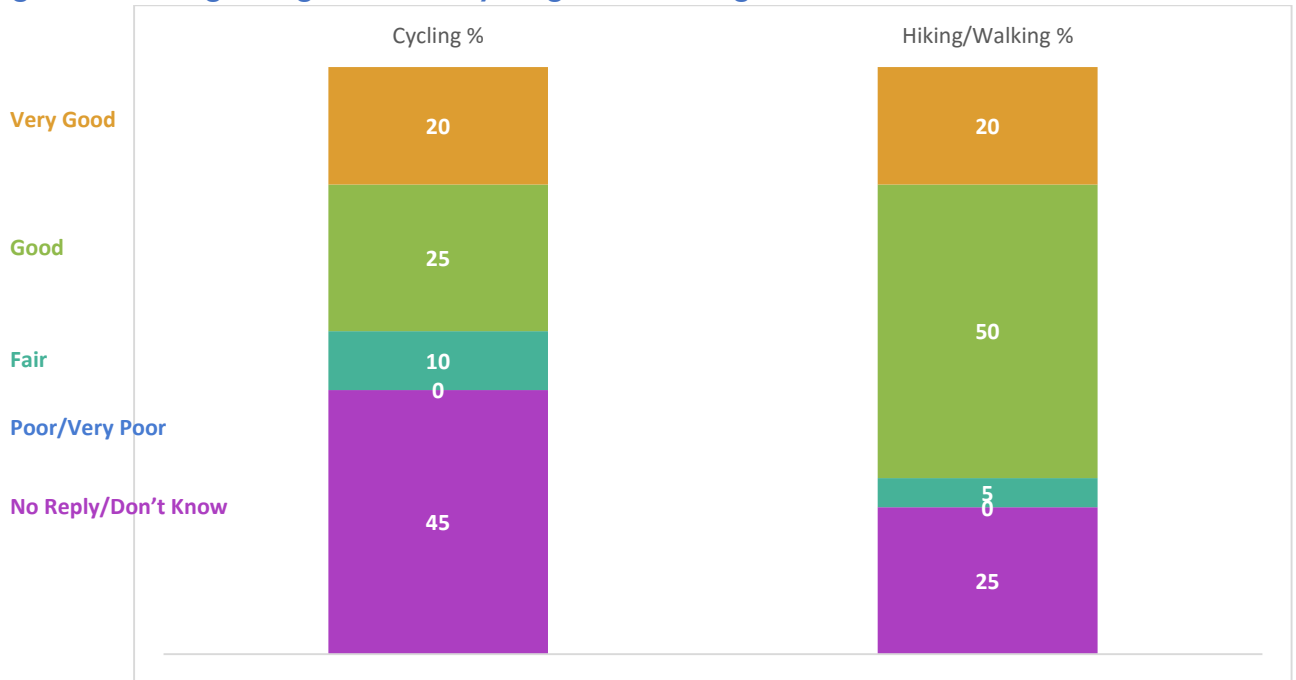


Source: International Trade Survey

On balance, a satisfactory rating was recorded in respect of the Algarve as a cycling destination, although a significant minority were not (sufficiently) aware of Algarve's cycling product to offer an opinion.

The Algarve is highly rated as a destination for walking with three quarters of trade representatives interviewed rating the activity as either 'very good' or 'good'. The level of endorsement of the Algarve as a walking destination was even higher amongst British and Irish trade representatives.

Figure 23: Rating of Algarve as a Cycling and Walking Destination

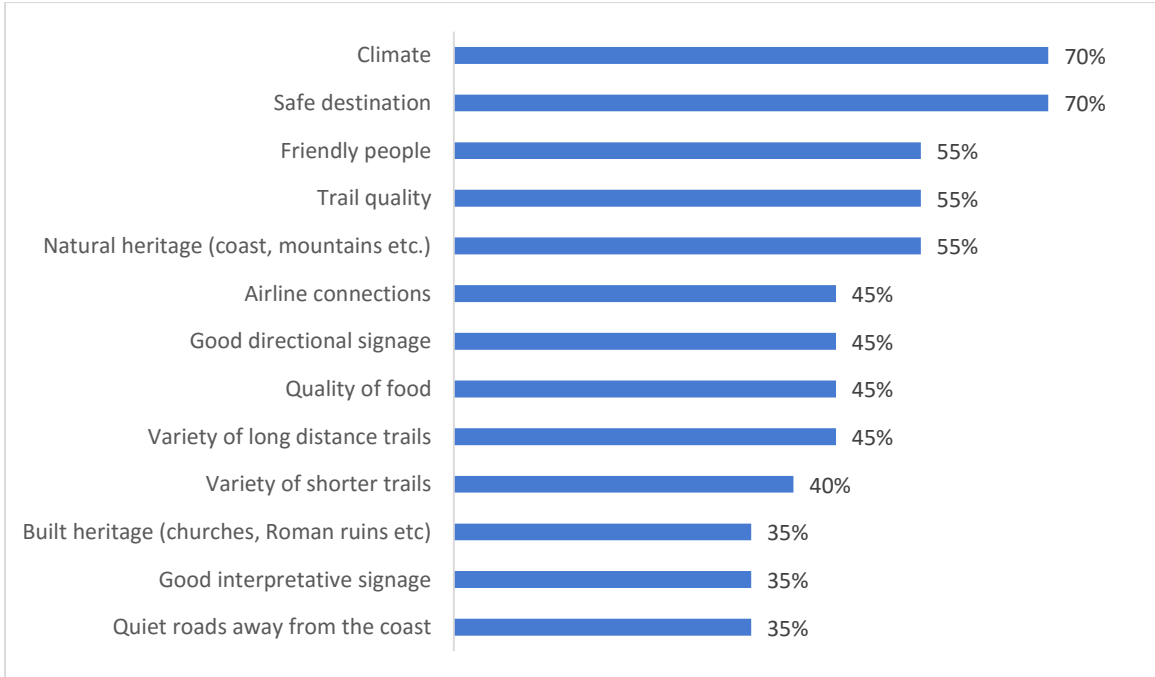


Source: International Trade Survey

Climate and 'safe destination' are cited as the main strengths of the Algarve as a walking destination (by 70% of trade respondents in both cases). The friendliness of the people, quality of walking trails, and natural heritage were also mentioned as positive attributes.

The full listing of strengths associated with the region is presented in Figure 24 below.

Figure 24: Strengths of Algarve as a WALKING Destination

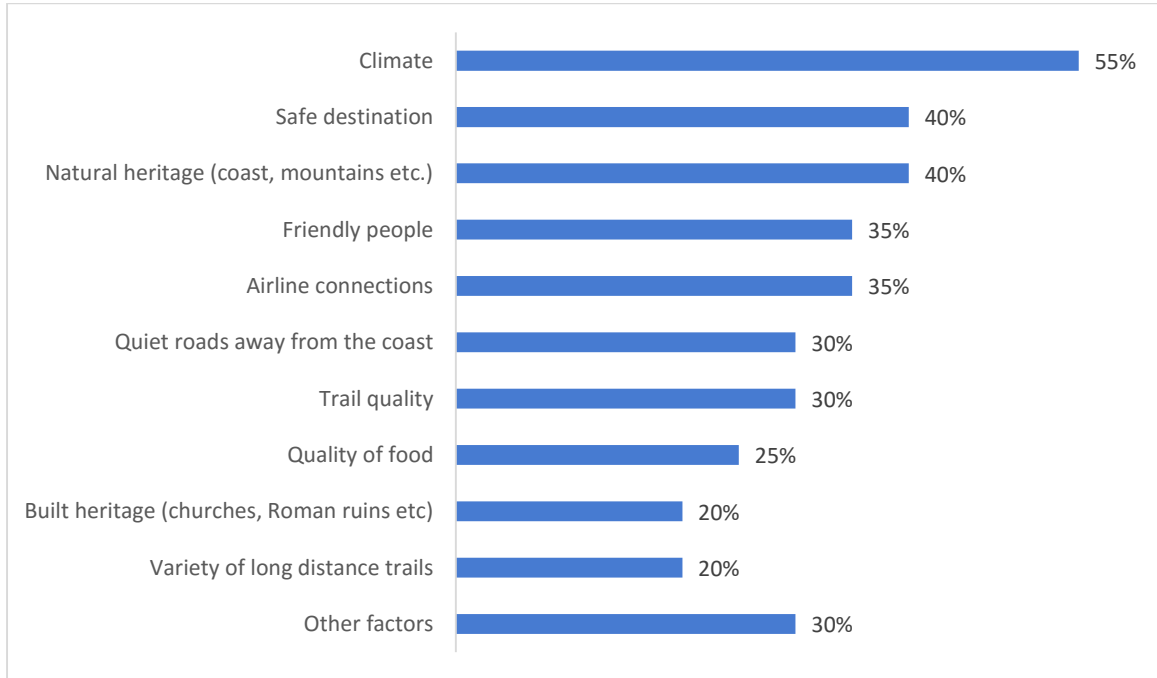


Source: International Trade Survey

The aforementioned attributes are also mentioned as strengths associated with the Algarve as a cycling destination.

In addition, the availability of quiet 'traffic free' roads, (good) airline connections, built heritage, quality of food, and variety of long distance trails were also identified as positive attributes.

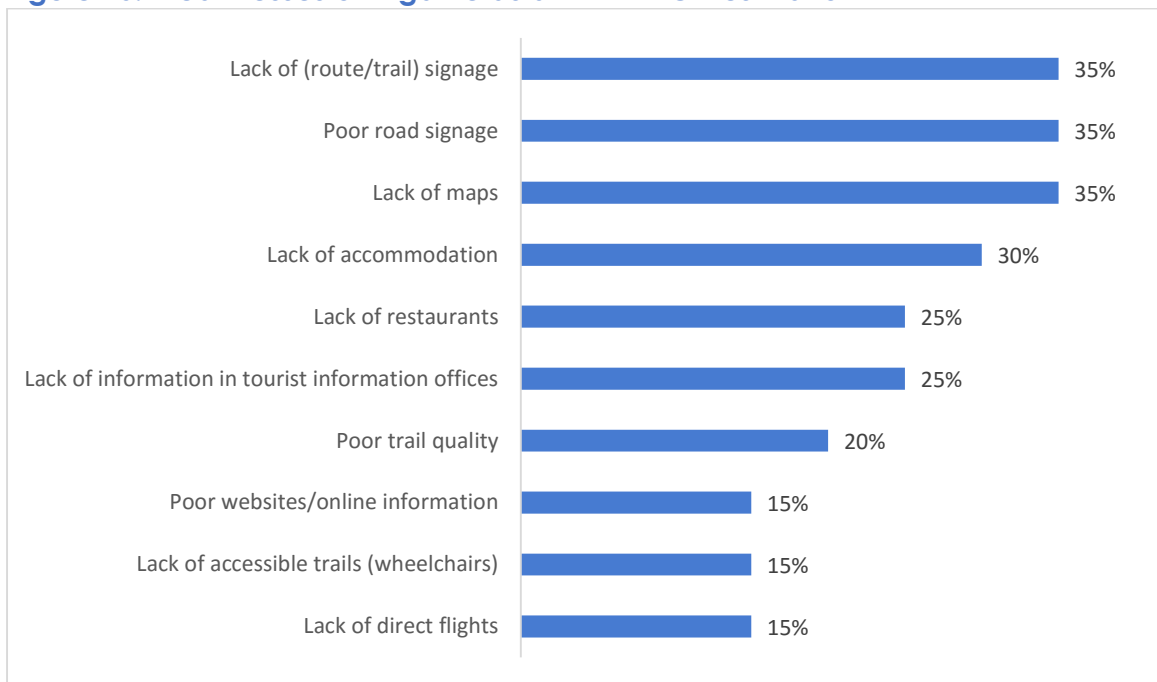
Figure 25: Strengths of Algarve as a CYCLING Destination



Source: International Trade Survey

A lack of route/trail signage, inadequate road signage and lack of maps were identified as the main weaknesses of the Algarve as a walking destination. International trade respondents also highlighted inadequacies in terms of lack of accommodation and restaurants near trails, problems with trail quality and lack of information at tourist information offices.

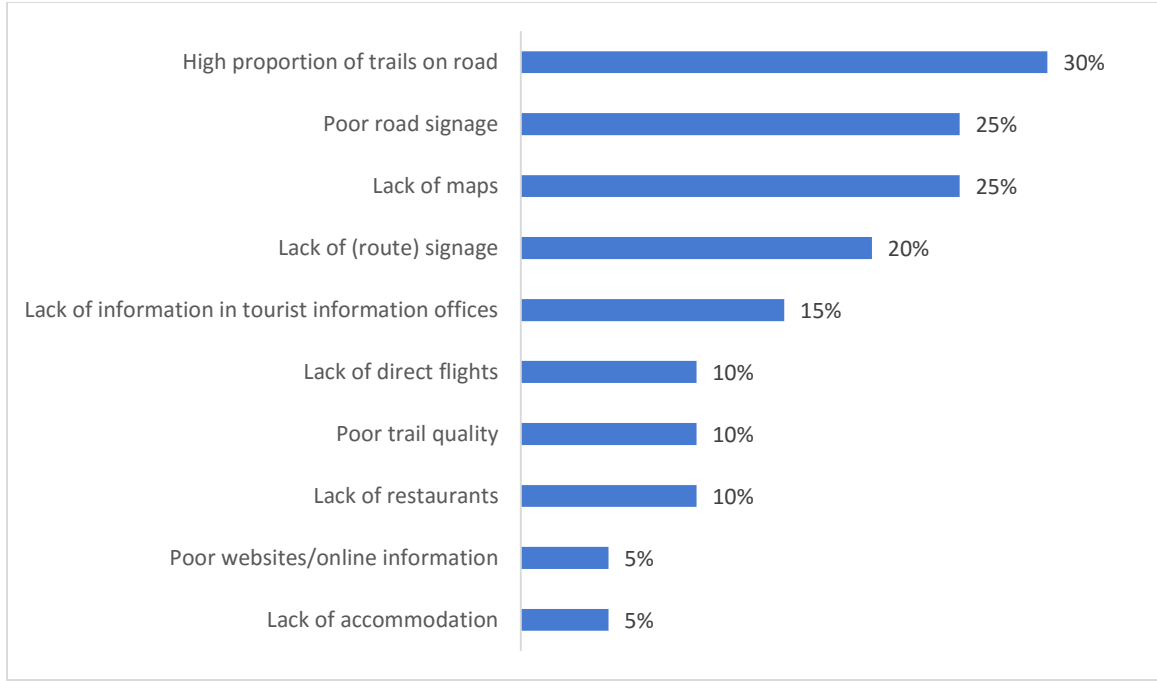
Figure 26: Weaknesses of Algarve as a WALKING Destination



Source: International Trade Survey

The fact that a high proportion of trails in the Algarve are 'on road' was identified as the main weakness of the region as a cycling destination. Poor road signage, allied to a lack of maps and route signage, were also cited as problems.

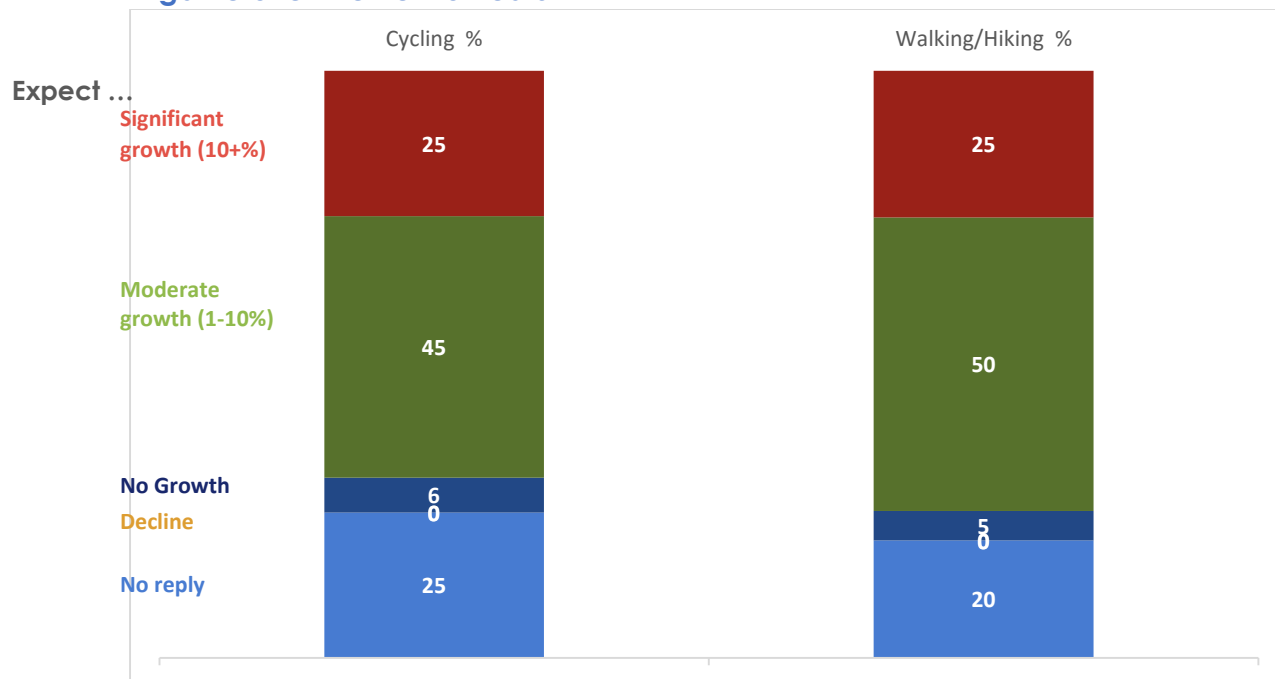
Figure 27: Weaknesses of Algarve as a CYCLING Destination



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 28: 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 29: Segments Considered to Offer the Best Potential for Cycling and Walking Holidays in the Algarve

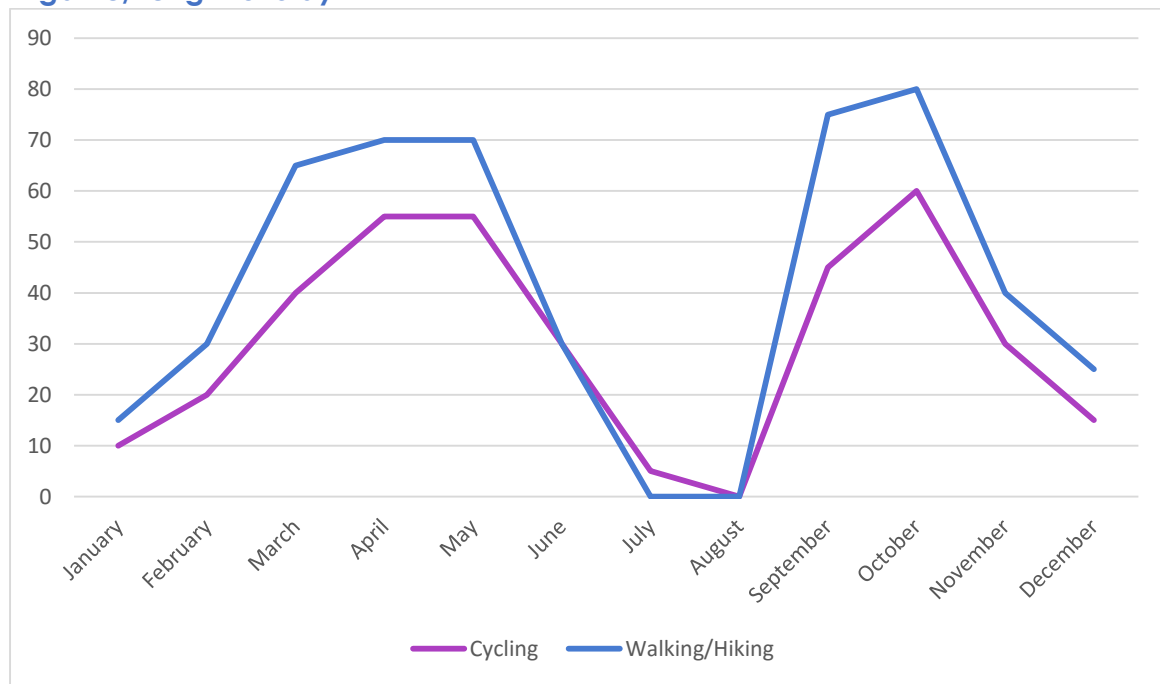
		Cycling	Hiking/ Walking
Gender		%	%
	Male	35	40
	Female	40	65
	No reply	45	25
Age		%	%
	Under 25	-	-
	26-35	10	-
	36-45	20	20
	46-55	45	50
	56-65	30	65
	65+	5	30
	No reply	40	20
	Party Composition		%
Individuals		30	50
Couples		45	60
Families		20	-
Small adult group		40	55
Other adult group		5	5
Professionals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

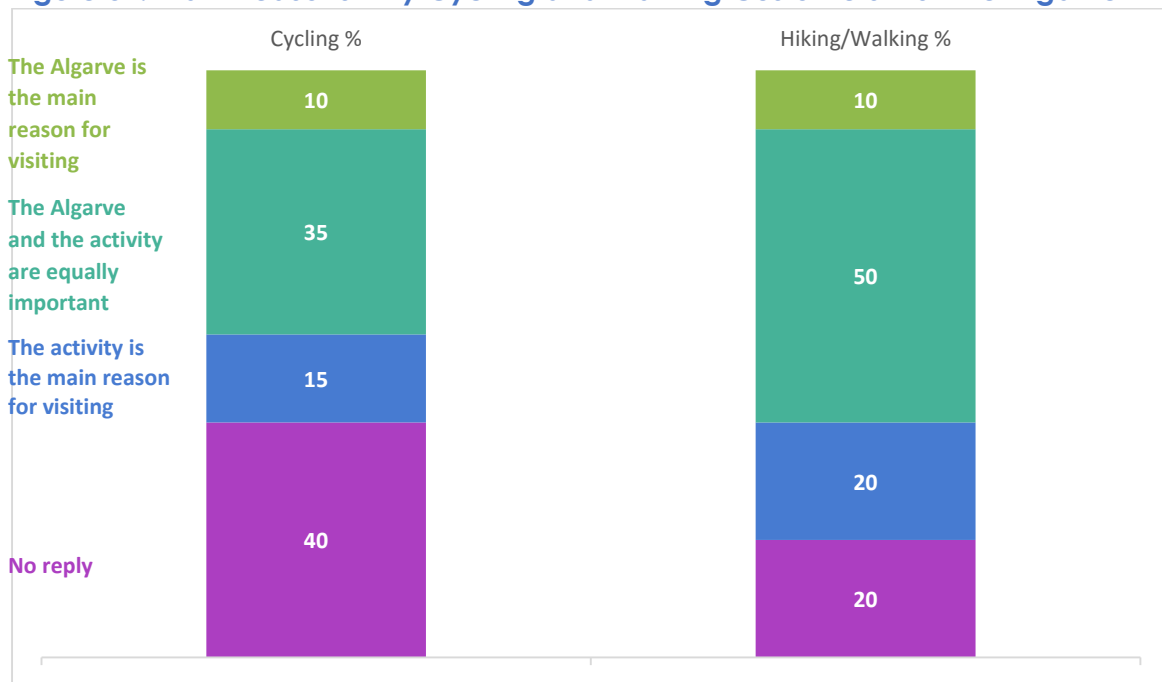
Source: International Trade Survey

The average length of stay for walkers visiting the Algarve is estimated at 7.57 days. Where cyclists are concerned, average length of stay is slightly shorter at 7.08 days.

When questioned on the main reasons why walking customers visit the Algarve, international trade executives are of the view that where these individuals are concerned, for the majority, the Algarve as a destination and the activity are equally important.

A similar pattern is perceived to exist where cyclists are concerned although a high proportion of trade respondents remain uncommitted on this particular question.

Figure 31: Main Reasons why Cycling and Walking Customers Visit the Algarve

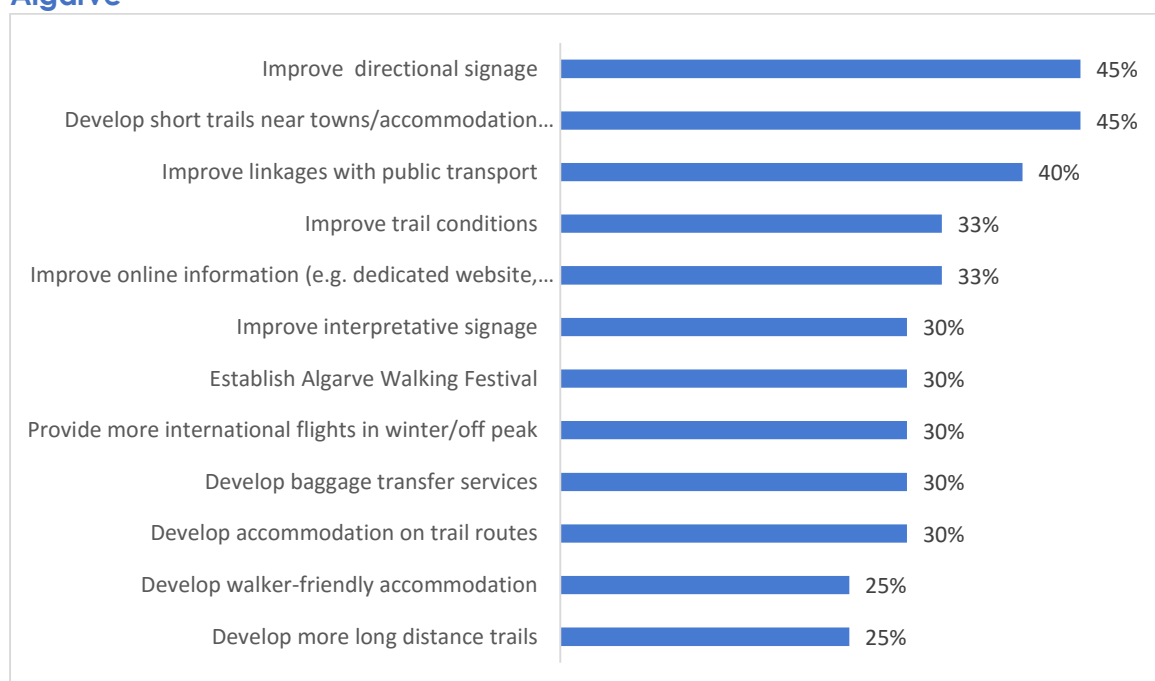


Source: International Trade Survey

In a final question, international travel trade executives were asked for their opinion regarding measures that could be taken to develop walking and cycling in the Algarve.

Improvements to directional signage, the development of short trails in close proximity to towns and accommodation centres, and improved linkages with public transport were identified as interventions requiring attention. A range of other product development, visitor servicing and marketing actions are also proposed and are set out in Figure 32 below.

Figure 32: Most Important Actions for the Development of WALKING Tourism to the Algarve

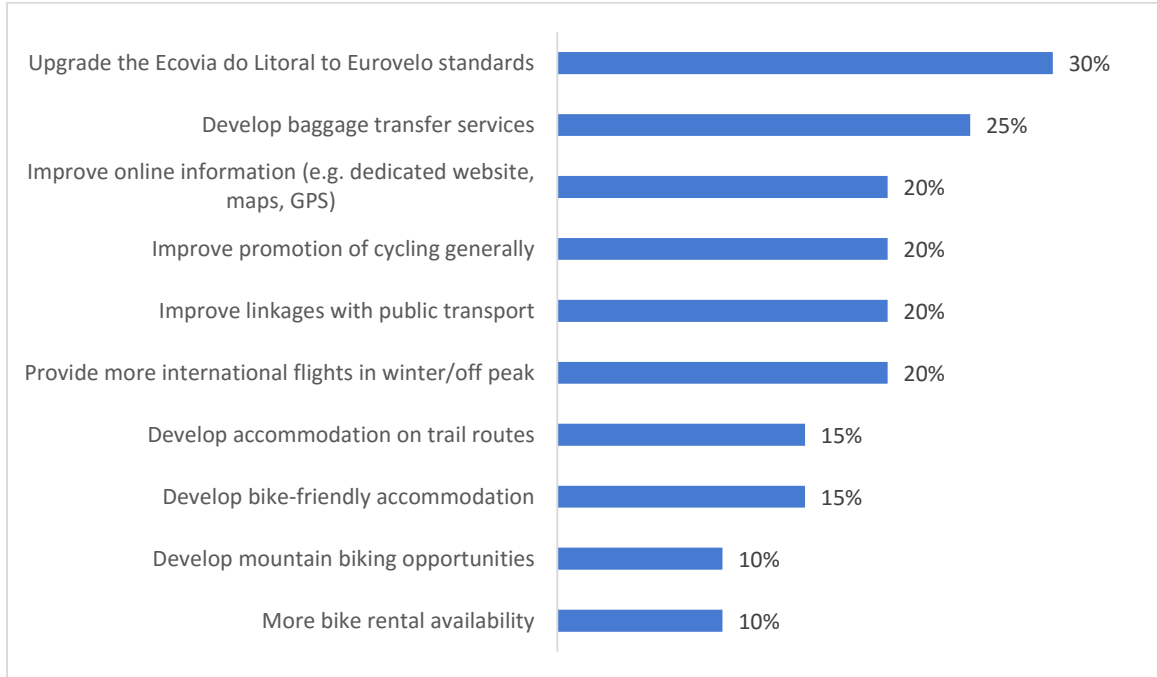


Source: International Trade Survey

Where the development of cycling is concerned, the upgrading of the Ecovia do Litoral to Eurovelo standards, and the development of baggage transfer services are cited as priorities. As with walking, international travel trade executives would like to see action on the marketing front, with improvements to on-line marketing and a general increase in promotion of the Algarve as a cycling destination.

Other suggested actions for the development of cycling in the region are presented in Figure 33 below.

Figure 33: Most Important Actions for the Development of CYCLING Tourism to the Algarve



Source: International Trade Survey

3.2. Stakeholder Map

For the purposes of this study a stakeholder mapping exercise was undertaken (see Figure 34).

Figure 34: 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 walking and cycling 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 walking and cycling 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.

4. Product Audit Assessment

4.1. Methodology

For the purposes of this study a comprehensive product audit was undertaken utilising a combination of:

- Desk based research: Focussing on tourism websites, strategic development plans, web searches
- In depth site visits for the study area
- Targeted consultation

In this context cycling and walking routes (both cycling touring and mountain-biking) have been considered as separate trails. However it is acknowledged that there is cross over both between infrastructure, in terms of some trails being used both for cycling and walking, and in terms of use with some visitors participating in both walking and cycle touring; while there is less of a cross over between participation in walking and road-racing.

The product evaluation was for cycling and walking routes involved a robust assessment of a sample of trails under a range of criteria including:

- Trail length and type
- Trail condition
- Signage (directional, orientation, interpretation)
- Management & organisation
- Maintenance
- Information provision (websites, maps and guides)
- Local linkages e.g. transport, accommodation
- Marketing/Promotion

Key findings and conclusions from the product audit are outlined below for walking (2.2) and cycling (2.3).

4.2. Gateways and Access Points

There are three tiers of gateways to the study area:

- **Tier 1: Large Urban Areas/Primary Destinations** which act as a base for many visitors and which include significant resident populations. Faro could be considered the primary access point for the Algarve due to the proximity of Faro Airport.
- **Tier 2: Primary Destination Areas** which may be part of visitor's circuit or act as a magnet to bring visitors into the broader area thus benefitting the communities in the study area.
- **Tier 3: Secondary Destination Areas or resorts** – these are included because of their role as transport hubs, population size, strategic location and availability of accommodation and local ancillary services. This category includes rural villages and smaller settlements which could also be considered access points for the four mountain areas.

Figure 35: Gateways to the Study Area

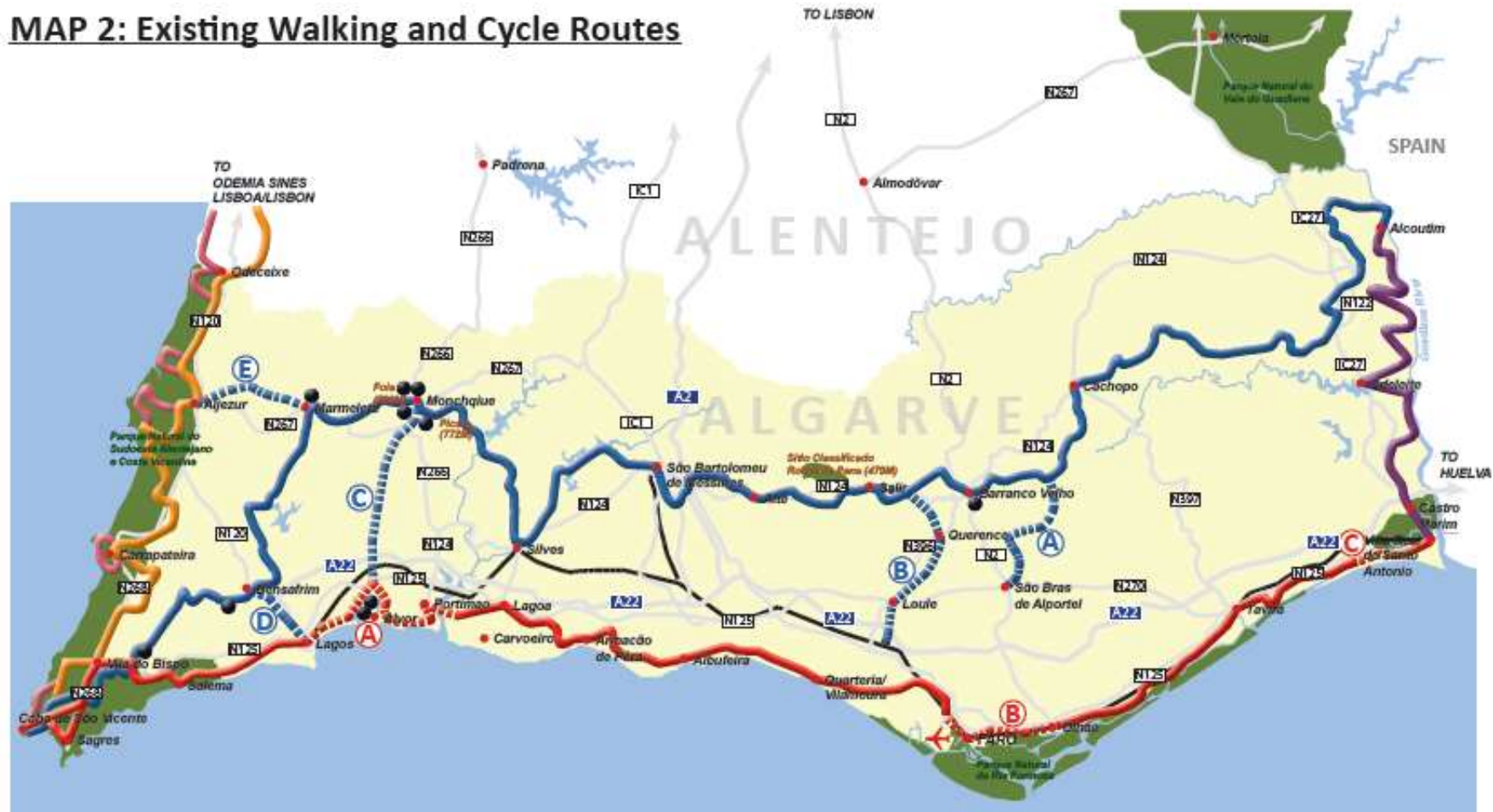
Tier 1: Large Urban Areas/Primary Destinations	Primary Destination Areas	Tier 2: Secondary Destination Areas
Faro	Monto Gordo	Loule São Brás de Alportel
Lagos	Praia da Rocha	Olhão Castro Marim
Portimao	Armação de Pêra	Vila Real de Santo António Villa do Bispo
Albufeira	Alvor	Sagres Alcoutim
Lagoa*	Vilamoura	Tavira Aljezur
		Silves Monchique

In addition to gateways there are a range of key access points to the study area for visitors and locals the majority of which are located in the primary destination gateways, such as:

- Rail and bus stations
- Intersections with existing trails
- Attractions in the study area: e.g. accommodation, activities, restaurants, shops that attract people to the area.

These gateways, access points and the roads between them are the places where economic benefits from visitors are most likely to be realised. Map 2 shows the locations of the main cycling and walking routes, gateway cities and towns and the transport network.

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 (Rio Alvor) - Portimão (Rio Arade) | | A Link 1 Parises - São Bras de Alportel (18.4km) |
| | Rota Vicentina Fishermans Trail (120km) | | B Faro (Pontes Marchil) - Bias do Sul (Olhão) | | 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 Marmeleite - Aljezur (18.6km) |

4.3. Cycling Routes

The Algarve has some of the best winter cycling opportunities anywhere in Europe with a combination of dramatic scenery with wild hill country and some untouched beaches with very good quality roads with little traffic, once you leave the coastal area. This combined with attractive villages, good food & wine, flora & fauna, friendly people and good weather make cycling in the Algarve an attractive proposition if visitors know where to go.

4.3.1. Regional Routes

Touring/Road Cycling: There is currently one official long distance cycling route in the Algarve, the Ecovia do Litoral (Coastal Greenway), a 214km route from Villa Real de Santo António in the east to Cabo de S.Vicente in the west. The concept of the route was initiated by Ria Formosa Natural Park in 2002 and they went to CCDR for funding and then developed with the aid of AMAL the idea from just a trail across the Ria Formosa NP area to a multi municipality trail from Villa Real Santo Antonio to Cape St Vincent (See Map 2).

The trail was initially benchmarked against international similar trails and a plan was developed with the cost estimated at €13m. The municipal councils then cut this budget to €3m with knock-on effect on the trail quality. Of this 3m around €1m went on signage, €1m went on re-surfacing and drainage, and €1m went on bridges and boardwalks.

Although capital funding was provided there was no maintenance budget which has meant deterioration of the product since 2008. This has meant that three sections – from Bias do Sul (East of Olhão) to Faro, from Burgau to Portimao and from Altura to the detour to Retur (1,5km to the East) are on the N125 or other heavy traffic roads. A key issue is that the lack of signage means people get lost and have a negative/dangerous experience.

While there are issues with the route it has tremendous potential to link the cities and towns along the coast of the Algarve. A survey of Megaspport customers who had completed the Ecovia said it had the potential to be one of the world's best coastal cycle routes.²³

Stages: While there is no official guide to suggest overnight stops. A tour by Irish Cycling Safaris splits the ride into six sectors (VillaReal-Tavira, Tavira-Olhao, Olhao-Boliquime, Boliquime-Praia da Rocha, Praia da Rocha-Salema, Salema-Cape St Vincent). The suggested five stages on the now offline www.ecoviasalgarve.org website are²³:

- Villa Real to Tavira 30km
- Tavira to Faro 39km
- Faro-Albufeira 49km
- Albufeira-Lagos 62km
- Lagos-Cape St Vincent 47km

²³ http://www.gpsies.com/mapUser.do?username=coelho_jorge

In practice it may be the case that some people may wish to reduce the length of the 4th and 5th stage and stop at places such as Praia da Rocha or Salema on the way.

Management organisation/funding: In 2007 there were 3 ideas on how to manage the trail – a body that would operate the Ecovia funded by the MC's; an existing entity such as AMAL, each MC would manage their own section, which is what has been happening up to now. From 2008 on there have been complaints from cyclists due to the lack of continuous route and declining quality. These were coming to AMAL and have now been directed to municipal councils to try to make them take ownership of the issues. Now there is currently effectively no management agency for the Ecovia do Litoral.

Signage: When the trail was first implemented around €1m was spent on signage. Some of which has deteriorated in the sun and with salt. A decision was taken not to install directional signage and instead to paint a blue line along the side of the road for cyclists to follow – the reasoning being to reduce visual clutter in urban areas. However there has been little or no maintenance carried out on the route since 2008 with much of the blue directional line worn away or removed due to road re-surfacing.



Information available: There are no official maps, websites or GPS details available. There was a website, www.ecoviasalgarve.org, but the company managing it went bankrupt and AMAL have not had the resources to restore it.

Visitor data: There is no recent visitor data available.

Key issues & opportunities: A decision has now been taken to progress the Ecovia do Litoral concept as part of the Eurovelo 1 route. All the countries along the route from Norway to Portugal met in November 2015 in Westport, Ireland to decide what would be needed to enable Eurovelo #1 (Atlantic Route)^[2]. The route will run from Norway, through UK, Ireland, France and via Salamanca south along Guadiana to Villa Real do Santo Antonio and to Cape St Vincent. Ideally, according to the Portuguese Cycling Federation, it should then run from there 700km north along the Rota Vicentina to Lisbon and the north of Portugal. This route will be identified by the end of November 2015 and there needs to be validation/buy-in from the local authorities. The route would likely be the Rota Vicentina Historical Way but not on the same route to avoid user conflict and carrying capacity issues.

The EuroVelo 1 project is being prepared by Conseil Général des Pyrénées Atlantiques and involving European Cycling Federation and all the relevant countries. It is likely that there will be around €1m funding for the Portuguese section. The project will be supported by AMAL, municipal councils, Turismo do Algarve, ATA and possibly Turismo do Portugal who will focus on:

- Project management
- Development of a stakeholder organisation including private sector
- Make EV1 a memorable destination of excellence
- Make cycling trips on EV1 easy and attractive (services and signage)
- Make the success visible through quantified economic evaluation

In the short term to enable the project there needs to be provision of basic information to manage the expectations of those arriving and undertaking the route. The easiest way is to provide a website and to provide online information on alternative routes to the N125 segments. In the mid-term, and in tandem with the French there needs to be marketing, monitoring, social media and upskilling of businesses along the route (enabling friendly communities). The cost for this would be around €170,000 some of which could be sourced from European funding. Both the Algarve Tourism Association (ATA) and Turismo do Algarve have buy-in to the Ecovia and are providing €100,000 towards social media, and promotion. The reality is that people's expectations need to be managed as many are already doing the route. Providing signage for the whole route would cost around €400,000.

In the long term the Ecovia should also be part of the 6,000km **Eurovelo #8 (Mediterranean Route)** from Cyprus to Cape St Vincent²⁴. The European Cycling Federation have said the Ecovia could be part of two Eurovelo routes.

The best section of the route now is the Villa Real do Santo Antonio to Brias do Sul to the west of Olhao. This is around 70km i.e. a day ride. This would require additional signage but could be launched as a Phase 1.

An indicative timescale, with sufficient financial resources, would be:

Q1/2 2016: Commission online version of current useable route with downloadable GPS tracks and optimum route from Paulo Guerra dos Santos or similar.

Q3/4 2016 – end 2017: Develop new signage standard for Ecovia and implement

Q3/4 2016 – end 2019: Activate new marketing tools including website, maps and guides.

Mountain-biking: There are **three long distance mountain-biking routes** in the Algarve – the Via Algarviana, the Grande Rota do Guadiana and the Historical Way on the Rota Vicentina can be completed on a mountain-bike by an intermediate rider.

²⁴ <http://www.eurovelo8.com/stages>

The Via Algarviana website and guidebook include information, including GPS, for the mountain-biking route. It is recommended that the route is ridden from Alcoutim to the Cape and completed over 5 days. The recommended stages are shown below in Figure 36.

Figure 36: Via Algarviana MTB Stages

Stage	Distance	Accumulated Ascent (m)	Accumulated Descent (m)
Alcoutim-Vaqueiros	58.8	1583	1352
Vaqueiros-Salir	58.88	2325	2317
Salir-Silves	63.1	1708	1950
Silves-Marmelete	42.9	2083	1709
Marmelete-Cabo S.Vicente	77.84	1140	1489

4.3.2. Local Cycling Routes

Touring/road: There are no official local road cycling routes. There are a range of routes promoted by local operators/companies and in publications such as 'Cycling the Algarve'²⁵. One of the routes in this guide book, shown below in Figure 37, is a 329km six-day touring circuit through the western half of the region which includes overnight stops, rides through quiet countryside and forested hills, visits to beaches and dramatic coastal scenery. The sectors for this ride which starts and finishes in Silves, include:

- Silves-Monchique 37km
- Monchique-Zambujeira 53.5km
- Zambujeira-Aljezur 49.5km
- Aljezur-Sagres 60.3km
- Sagres-Lagos 54.7km
- Lagos-Silves 73.5km

This guide also indicates ten day rides at Aljezur, Boliqueime, Lagos, Mexilhoeira Grande, Monchique, Silves and Zambujeira.

From undertaking the product audit it can be observed that the quality of the road surface in much of the rural hinterland of the Algarve in combination with a relative lack of traffic, provide very good conditions for the development of rural long distance cycle routes.

²⁵ *Cycling the Algarve*, Huw Thomas, Pedal Portugal, 2015

4.3.3. Cycling Events

The Volta do Algarve (Tour of the Algarve) is a 5-stage 783km competitive road race that has been staged since 1960 with 41 editions, as of 2015. This event was last staged over 18-22nd February 2015.

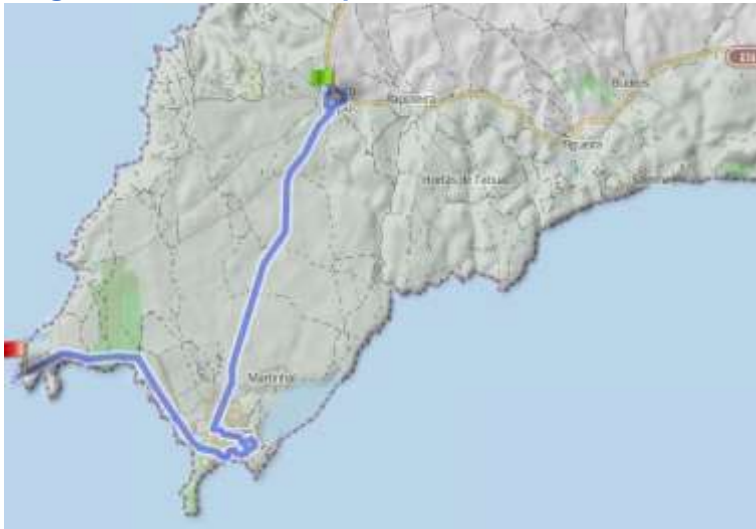
Stage 1 Lagos-Albufeira 167km



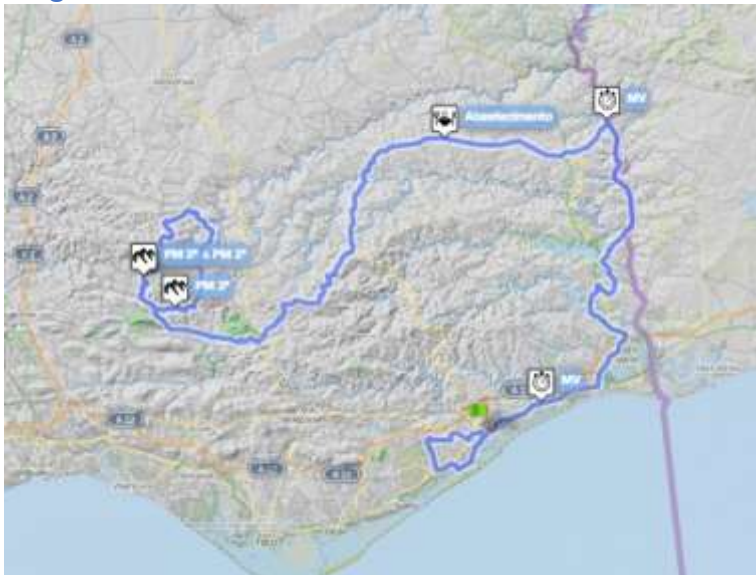
Stage 2 Lagoa-Monchique 197km



Stage 3 Vila do Bispo-Cabo de Sao Vicente 19km



Stage 4 Tavira-Malhao 216km



Stage 5 Almodovar-Vilamoura 184km



Total distance 783km

There were twenty-two teams of eight (176) riders starting the race in 2015.

Issues and Opportunities:

The Volta do Algarve is part of the international racing circuit with many international teams taking part as a training for the Spring Classic races. Turismo do Algarve have been criticised for not investing to ensure the Volta do Algarve has been shown on Eurosport since 2012 given this would include significant aerial video of the Algarve region²⁶.

4.3.4. Bike Rental

- Abilio Bikes – based in Tavira in the eastern Algarve. Has a range of machines to rent by the day or month.
- Sport Nautica – based at Tavira
- Formosar – based at Faro
- Bikawish – based at Vilamoura
- Bikeland – based near Vilamoura
- East Algarve Bike Hire – based at Monto Gordo
- Fun River – based at Alcoutim, has around 20 road bikes and 4 mountain bikes, plus kayaks. Can arrange one way drop off to VR do Santo Antonio.
- Algarve Adventure – mountain bikes only but includes delivery.
- Algarve Bike Hire – based in Armacao de Pera, a small town to the west of Albufeira. Has road bikes and tourers as well as hybrids, mountain and city bikes for hire. Offers a delivery and collection service for the whole of the Algarve (free for immediate area, charge for wider area).
- Avalanche – bike shop at São Brás de Alportel (north of Faro) that also offers bike hire and free delivery in a 25km radius of the town. Has mountain bikes or a choice of carbon or aluminium frame road bikes.
- Easy Go Electric Bikes – a new company based in Lagos, free delivery of electric bikes within a 10km radius.
- Mountain Bike Adventure – based at Lagos
- MegaSport – based near Loule (north of Faro) offers Giant road and town/hybrid bikes – plus tandems (although these are more ‘fun’ rides than serious machines). Delivers free within the Algarve.
- Funbike – based at Boliqueime, north-east of Albufeira. Despite the name, they have ‘serious’ mountain bikes and road bikes for hire.
- Lisa Bikes – based in Estoi (north of Faro) and has road, MTB and ‘touring’ (hybrid) bikes to rent (including children’s bikes). Also has electric bikes. The company also offers a range of cycle tours, both based based from one location or touring the region.
- Alternativtour – based at Monchique

²⁶ Consultation with Thomas Swift Metcalfe, October 2015

- Sagres Nautica – based at Sagres

4.3.5. Regional Mountain-Biking Centre

The Portuguese Cycling Federation is currently selecting a site for a regional BTT centre in the Algarve. Centros de BTT is a national project and have developed 10+ centres in the north. There is a website and they are planning ones in Monchique and Sao Bras de Alportel.

4.4. Walking Routes

The Algarve contains walking trails of such range and quality that they enable international comparison. While each of the mountain areas are individually renowned for walking, once the areas are grouped together it can be seen that this region is exceptionally well endowed with walking trails from short walks to loop and linear walks that take a few hours up to long distance multi-day walking routes that take in outstanding views and historical features.

4.4.1. Regional Walking Routes

There are three long distance walking routes in the Algarve; Rota Vicentina, Via Algarviana and the recently opened Grande Rota do Guadiana. The towns and villages and the start and end of each stage are the places which will benefit most from increased numbers of walkers and cyclists on each route. These routes, towns and villages are shown on Map 2.

Rota Vicentina

Trail Information: The Rota Vicentina is a corridor of activity along the Costa Vicentina on the Algarve's west coast. The route consist of two main trails, the Fisherman's Trail which runs from Porto Covo in Alentejo to Odeceixe in the Algarve and its 5 complementary circuits, the Historical Trail which runs from Santiago do Cacem in Alentejo to Cabo Sao Vicente in the Algarve, and five circular routes. While Casas Brancas, the earlier version of Rota Vicentina Association, was started in 2002 work to implement infrastructure on the trails did not begin until 2008 and took 3 years. Rota Vicentina officially opened in 2012. The Rota Vicentina consists of two trails:

- **The Fisherman's Trail** - follows the coast along cliff top paths traditionally used by fishermen and is located within the Southwest Alentejo and Vicentina Coast Natural Park. It comprises a total of 4 sections and 5 complementary circuits, totalling 120 km.

- **The Historical Way** - follows trails used by pilgrims, travellers and locals on their journeys throughout the region. This trail is fully accessible to hikers and mountain bikers, with stretches of cork tree forests, mountain ranges, valleys and rivers. It comprises a total of 12 sections and 230 km.

Figure 39: Rota Vicentina



There are four stages to the Fisherman's Trail and four additional complementary circuits as shown in Figures 40 and 41 below.

Figure 40: Fisherman's Trail Stages

Stage	Start/end destinations	Distance (km)
1	Porto Covo – Vila Nova de Milfontes	20
2	Vila Nova de Milfontes - Almogrove	15
3	Almogrove – Zambujeira do Mar	22
4	Zambujeira do Mar - Odeceixe	18

Figure 41: Fishermen’s Trail Complementary Circuits

Circuit	Name	Distance (km)
1	Circuito Praia de Odeceixe	9
2	Circuito Praia da Amoreira	6
3	Circuito Ponta da Atalaia	14
4	Circuito Pontal da Carrapateira	10
5	Circuito Praia do Telheiro	6

There are 12 stages on the Historical Way as shown in Figure 42 below.

Figure 42: Historical Way Stages

Stage	Start/end destinations	Distance (km)
1	Santiago do Cacem – Vale Seco	18
2	Vale Seco – Cercal do Alentejo	23
3	Cercal do Alentejo – Porto Covo (link to Fisherman's Trail)	18
4	Cercal do Alentejo – S.Luis	21
5	S.Luis - Odemeira	25
6	Odemeira – S.Teotonio	19
7	S.Teotonio - Odeceixe	17
8	Odeceixe - Aljezur	18
9	Aljezur - Arrifana	12
10	Arrifana - Carrapateira	24
11	Carrapateira – Vila do Bispo	22
12	Vila do Bispo – Cabo de S.Vicente	14

Circular Routes: There are five short loop routes at Almogrove, S. Luís, Troviscais, Santa Clara and Sabóia in Alentejo. These are 3.5km to 13km in length.

Management organisation/funding: Rota Vicentina Association for the Promotion of Nature Tourism in the Alentejo and Vicentina Coast (www.rotavicentina.com), is a non-profit organisation founded in June 2013 that is responsible for the project Rota Vicentina. The association Casas Brancas was the coordinator of the project in its implementation phase, in partnership with the association Almargem, the local municipalities and parish councils, local and regional entities, companies and individuals that have supported the project and made it a viable proposition. This is the most significant network of public and private partners, united in a joint initiative in the region.



Rota Vicentina Association (RVA) is seen as more inclusive than Casas Brancas and now has over 150 members with more applying to join every week. Members include accommodation providers, tour operators and taxi companies. Membership fees are now almost double the amount of annual public sector funding from municipal councils meaning the RVA business model is becoming increasingly sustainable. The amount each local authority pays is based on the number of stage stops (overnight stops) they have in their area with a minimum of 3 as this is where people stay and where councils generate the most income from visitors. Funding also comes from sponsorship e.g. Europcar.

Maintenance of the trail is underpinned by a strong volunteer network who sponsor a section of 20km+ and walk it twice a year, reporting problems or carrying out maintenance themselves. Significant maintenance is undertaken by the municipal councils.

The objectives of the Rota Vicentina Association are to:

- Establish south-west Portugal as an international nature tourism destination, raising awareness of the environmental and cultural significance of the region
- Regulate the passage of walkers through environmentally sensitive areas
- Consolidate development network (companies, institutions, population)
- Present the region with a public infrastructure for the enjoyment of nature, getting tourists close to the local population
- Stimulate the existing offer during the medium/low season and contribute to the sustainability of rural areas by creating new business opportunities²⁷

Signage: The Rota Vicentina has very high quality directional, orientation and interpretation signage. There are 26 interpretation panels in villages - the start/end points of 22 sections and on 5 loop trails.

Information available: Very high quality and highly informative website with maps available to download in all formats for all sections including GPS, GPX and KMZ formats for use in Google Earth and Google Maps. High quality printed maps and guides are also available. Innovative features of the website include online booking facility for accommodation; and an itinerary planner linked to an algorithm that suggests an itinerary based on the user profile and length of stay.

Visitor data available: None available



²⁷ Rota Vicentina Association, 2015

Key issues & opportunities:

- Although all of the Historical Way can be cycled Rota Vicentina Association prefer not to promote this due to the potential for user conflict. This means there is a need for a complementary cycle route in response to significant demand.
- Rota Vicentina Association aim to extend the Rota Vicentina to Lagos in the next two years. This would enable visitors to fly to Faro and get the train to Lagos and the start of the Rota Vicentina.
- A lack of visitor data makes prioritised investment difficult. Numerical, qualitative and carrying capacity monitoring would enable RVA to work with sponsors, media and EU funds – it would provide justification for investment. A baseline socio-economic study and carrying capacity study are considered essential.
- While the route has world class information provision it currently lacks an app to provide information on what can be seen and done.

Via Algarviana

Trail Information: Via Algarviana (GR13) is a 300km walking and mountain-biking route from near the Guadiana River at Alcoutim in the Algarve's north-east to Cabo Sao Vicente in the south-west. The route runs through the mountains of Serra do Caldeirão and Serra de Monchique. The concept of Via Algarviana was begun as a collaborative effort between Almargem and the local group Algarve Walkers in 1995 but the trail was not completed until 2009. The path has its origins in an old religious trail followed by pilgrims heading for the Sagres promontory, where the relics of St. Vincent were found.

Figure 43: Via Algarviana Route Map



Stages: There are 14 stages to the Via Algarviana, some of which can be combined depending on the fitness of the walker as shown in Figure 44 below.

Figure 44: Via Algarviana Stages

Stage	Start/end destinations	Distance	Time (approx.)
1	Alcoutim to Balcuross	24.2km	7 hours
2	Balcuross to Furnazinhas	14.3km	4 hours
3	Furnazinhas to Vaqueiros	20.3km	6 hours
4	Vaqueiros to Cachopo	14.88km	4 hours
5	Cachopo to Barranco do Velho	29.10km	8 hours
6	Barranco do Velho to Salir	14.9km	5 hours
7	Salir to Alte	16.2km	7 hours
8	Alte ²⁸ to Messines	19.3km	5 hours
9	Messines to Silves	27.6km	8 hours
10	Silves to Monchique	28.6km	8 hours
11	Monchique to Marmeleite	14.7km	4 hours
12	Marmeleite to Bensafrim	30km	7 hours
13	Bensafrim to Vila do Bispo	30.19km	8 hours
14	Vila do Bispo to Cabo S.Vicente	16.6km	5 hours
Total		300.87	

Links: There are now 5 linking trails which connect the Via Algarviana to nearby urban settlements and train stations. These include:

- Link 1: Parises - São Brás de Alportel 18.4km 5 hours
- Link 2: Loule Train station – Salir 28.2km 7 hours
- Link 3: Train station of Mexilhoeira Grande – Monchique 25.4km 6.5 hours
- Link 4: Train station of Lagos – Bensafrim 10.1km 2.5 hours
- Link 5: Marmeleite – Aljezur 18.6km 5 hours

Complementary Routes: There are 12 looped trails promoted along with the Via Algarviana, with good quality printed maps. These routes, are shown in Figure 45 below, with those in bold starting alongside the Via Algarviana. The location of these routes is also shown on Map 2.

²⁸ Via Algarviana official guide book incorrectly refers to this stage as Salir-Messines, page 63

Figure 45: Complementary Routes on the Via Algarviana

Reference	Name	Start/end point	Distance/Time
PR9 CTM	Percorso Pedestre "Mina e Albufeira"	Furnazinhas	7.7km/2-3 hours
PR10 CTM	Percorso Pedestre "Barrancos"	Furnazinhas	7.8km/2-3 hours
PR1 SLV	Percorso Pedestre Cultural de São Bartolomeu de Messines	São Bartolomeu de Messines	12.5km/3-4 hours
PR1 PTM	Percorso Pedestre "A Rocha Delicada"	Mexilhoeira Grande	7.5km/2 hours
PR2 PTM	Percorso Pedestre "Ao Sabor da Maré"	Alvor	4.7km/1.5 hours
PR2 MCQ	Caminho das Caldas - Picota	Caldas near Monchique	18km/5 hours
PR3 MCQ	Trilho da Fóia	Fóia	6.5km/2 hours
PR4 MCQ	Trilho dos Moinhos	Monchique	10.3km/3hours
PR5 MCQ	Percorso Pedestre das Cascatas	Fóia	17km/5 hours
PR6 MCQ	Percorso Pedestre de Marmeleite	Marmeleite	8.4km/2.5-3 hours
PR1 LGS	Percorso Pedestre "Pedra do Galo"	B. S. João National Forest Crossroad	6.1km/1.5 hours
PR4 VBP	Percorso Pedestre "Pelas Encostas da Raposeira"	Raposeira	13.7km/4 hours or 18.2/5 hours

In order to increase the attractiveness of Via Algarviana (GR13) four new thematic routes with twelve walks were developed with associated directional, interpretive signs and very informative digital guides, these are shown in Figure 46, below. These include:

- Rota do Contrabandista (Alcoutim)
- Rota da Água (Loulé)
- Rota das Árvores Monumentais (Monchique)
- Rota da Geologia (Monchique)²⁹

²⁹ <http://www.viaalgarviana.org/index.php/guias-rotas-tematicas/?lang=en>

Figure 46: Via Algarviana Thematic Routes

Rota do Contrabandista	Walking Route of Lourinhã	Alcoutim	5.5km/2.5 hours
	Walking Route of Pontal	Pontal Viewpoint	6km/3 hours
Rota do Agua	Walking Route of Olho Pariz	Bus stop square at Amendoeira	3.6km
	Walking Route of Benémola	Fonte Benémola	1.3km
	Walking Route of Barranco do Velho	Barranco do Velho	5km
	Walking Route of Chavachã	Moinho da Chavachã	0.4km
	Walking Route of Almarginho	Near Almarginho	3.6km
Rota da Agua	Trail 1 - Marmeleite	Marmeleite	6.22km
	Trail 2 – Foia and surrounding area	Near Fóia	15.3km
Rota das Arvores Monumentais	Town Circuit	Monchique	6.3km
	Picota Circuit	Tourist Office	27km
	Foia Circuit		17km

Management organisation/Funding: The Via Algarviana is managed by Almargem and mainly dependent on funding from Municipal Councils with some grant funding from Turismo do Algarve.

Signage: The Via Algarviana is signposted with directional sign poles and arrows and interpretation panels. These all use the GR13 identification. Interpretation panels are installed at the beginning and end of each sector to inform walkers about the natural and cultural heritage, and accommodation and food available.

Information available: Detailed maps and guidebook available from Almargem, website for the route available at www.viaalgarviana.org which also hosts links for downloading 14 sector maps, 5 link maps, 12 Pequenas Rotas maps, and 4 thematic routes. The guide for Via Algarviana and GPS track can also be downloaded from the website.

Visitor data available: None available



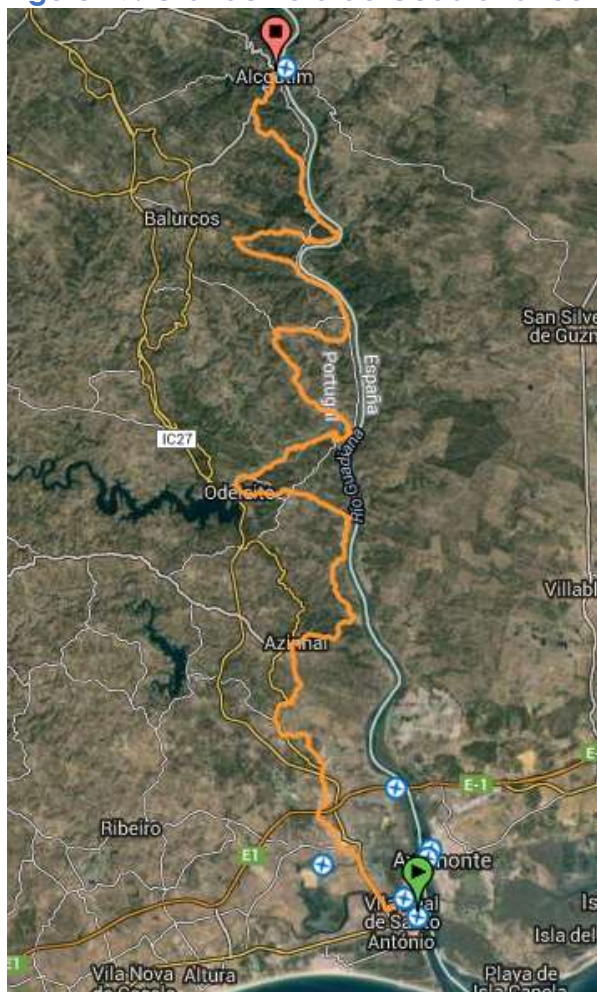
Key issues & opportunities:

- Almargem have received two tranches of European funding for the Via Algarviana and would be unlikely to gain a third. A sustainable funding model is needed, similar to Rota Vicentina Association.
- Lack of accommodation options, particularly in the east.
- Lack of visitor data means investment cannot be prioritised
- Need for more & upgraded signage
- The website would benefit from investment & upgrading and better imagery, more information on accommodation including booking options, and more information on public transport with timetables.

Grande Rota do Guadiana

Trail Information: The Grande Rota Do Guadiana (GR15) runs 65k from Alcoutim to Villa Real de Santo Antonio along the Guadiana River. The route was launched in November 2014. The trail was developed by Odiana Association which is funded as a rural development association by the municipal councils of Alcoutim, Castro Marim and VR. De Santo Antonio. Odiana also manage 19 walking routes which can also be mountain-biked, as can the Grande Rota do Guadiana. The trail does not follow the line of the river due to a requirement by the municipal councils that only public land be used. This has meant 19.5% of the route is on-road.

Figure 47: Grande Rota do Guadiana route



Source: <http://pt.wikiloc.com/wikiloc/view.do?id=8376543>

Stages: There is a lack of online information regarding recommended stages, services, accommodation or activities along the route. There are no defined stages for the route.

Circuits: There are eight shorter circuits along the Grande Rota do Guadiana, also managed by Odiana Association.

Management organisation: Odiana Association were responsible for the route development and are now responsible, along with the municipal councils, for trail maintenance.

Information available: While a map of the trail is available at <http://www.wikiloc.com/wikiloc/view.do?id=8376543#> there is no printed map, downloadable maps, guides or website available.

Signage: The trail has high quality directional and orientation signage.

Visitor data available: None available



Key issues & opportunities:

- Odiana would like to see the Grande Rota do Guadiana expand to the north into Alentjo. They already have an agreement with Alentjo for this. The link would link to the Camino do Santiago, and to an area with different identity, environment, people and gastronomy.
- Funding for development and promotion is difficult as Odiana cannot become an associative model like RVA due to it being funded by the public sector.
- Need for visitor monitoring to enable targeted investment and to attract development funding.
- Alcoutim Municipal Council plan to develop a cycle route to the border with Castro Marim Municipal Council – opening the opportunity for a cycle route that follows the route of the Grande Rota do Guadiana making it a corridor of activity as with Rota Vicentina.
- Key priorities for Odiana in relation to the Grande Rota do Guadiana would be the development of an app, a high definition promotional video, high quality maps, and increased attendance at trade fairs to promote the trail.

4.4.2. Local Walking Routes

There are a significant number of local walking routes ranging from thirty minutes to a full day.

Thirty-four trails are promoted via Turismo do Algarve's publication '*Guide to Walking Trails in the Algarve*' which are shown in Figure 48 below. This selection of walks includes ones managed by Odiana Association, In Loco, INCF and several municipal councils or combinations of these entities. While the prioritising of walks could make sense there are several issues with this publication including:

- **Poor quality publication:** The publication is not of sufficient quality to allow international comparison – the maps are unclear and starting points of walks are, in general, impossible to find without associated use of GPS. The publication has included a great deal of text and images but does not include information that is of most value to walkers such as accommodation or profile data.
- **Poor quality signage:** Most walks apart from those managed by Odiana lack either orientation signage, directional signage or both. In some cases where interpretative signage has been installed this has been installed facing the sun and has burnt away e.g. Nature Discovery Trail of the Marim Environmental Centre. In many cases orientation signage has been installed but there is no associated directional signage meaning visitors, having found the start of the walk, do not know which way to go.
- **Many walks are not located in close proximity to settlements or visitor hubs.** This is where the most economic benefit is likely to be realised, where infrastructure should be concentrated, and where marketing efforts focussed.

- Many existing walks have not been included in this publication such as:
 - Twelve of the nineteen Odiana Association routes (see Figure 49 below for Odiana routes)
 - Seven of the nine In Loco Association routes (see Figure 50 below for In Loco routes)
 - Five links and some of the twelve circuits on the Via Algarviana;
 - Five loops on the Fisherman's Trail on the Rota Vicentina
 - Coastal walks such as Lagos to Salema, Salema to Sagres and Carvoeiro to Benagil – which include some of the most scenic coastal walking in the Algarve
 - Many Pequenas Rotas (PR routes) developed by the sixteen municipal councils. Some of the walks developed by Loule Municipal Council have been included in a publication by them which also includes four mountain-biking routes. The walking routes are shown in Figure 48 below.

Figure 48: Walking Routes Promoted in Turismo do Algarve's 'Guide to Walking Trails in the Algarve'

Type of walk (loop/linear)/User (walk/MTB/horse)	Name	Town/Municipality	Distance/Time	Responsibility	Associated Long Distance Trail
West Coast					
Loop - walk	Trail of Aromas	Borderia, Aljezur	14km/4.5hrs	Borderia Parish Office	Rota Vicentina
Loop - walk/MTB/horse	Trail of Tides	Carrapateira, Aljezur	19km/7hrs	Borderia Parish Office	Rota Vicentina
Loop - walk	Casteljo Environmental Trail	Casteljo Environmental Area, Vila do Bispo	3.5km/1hr30	Vila do Bispo Parish Office	Rota Vicentina/Via Algarviana
The South Coast					
Loop - walk	At the Whim of the Tides	Alvor, Portimao	5km/2hr	Portimao Municipal Council	Ecovia do Litoral
Loop - walk	Rocha Delicada Trail	Quinta da Rocha, Portimao	7km/2hr	Portimao Municipal Council	Ecovia do Litoral
Linear - walk	Praia Grande Interpretation Trail	Praia Grande, Silves	5.5km/2hr	CCDR-Algarve	Via Algarviana
Linear - walk	Sao Lourenco Trail	Quinta do Lago, Loule	3.4km/1hr30	Quinta do Lago, Loule Municipal Council, PNRF and Infraquinta	Via Algarviana
Linear - walk	Ilha da Cultura Trail	Ilha da Cultura, Faro	5.6km/2hr	Ria Formosa Natural park, Faro Municipal Council, Ambifaro	Ecovia do Litoral
Loop - walk	Nature Discovery Trail of the Marim Environmental Centre	Quinta da Marim, Olhao	3km/1hr30	ICNF (Ria Formosa Natural Park)	Ecovia do Litoral

Type of walk (loop/linear)/User (walk/MTB/horse)	Name	Town/Municipality	Distance/Time	Responsibility	Associated Long Distance Trail
Linear - walk	Praia do Barril Trail	Pedras d'El Rei, Tavira	3km/1hr15	Tavira Municipal Council and ICN (Ria Formosa Natural Park)	Ecovia do Litoral
Barrocal					
Linear - walk	Sítio das Fontes Municipal Park Trail	Sítio das Fontes, Lagoa	1.2km/30mins	Lagoa Municipal Council	No
Loop - walk	Paderne Castle Trail	Paderne, Albufeira	4.5km/1hr30	CCDR-Algarve	No
Loop - walk	Cerro de Sao Vicente Trail	Paderne, Albufeira	11km/3hr30	Albufeira Municipal Council	No
Loop - walk	Rocha da Pena Trail	Rocha da Pena, Loule	6.4km/2hr	Loule Municipal Council	Via Algarviana
Loop - walk	Fonte Benemola Trail	Fonte Benemola, Loule	4.4km/1hr30	Loule Municipal Council	Via Algarviana
Loop - walk	A Walk to the Spring	Fonte de Mesquita, Sao Bras de Alportel	9km/3hr	Sao Bras de Alportel Municipal Council	No
Serra					
Loop - walk	Discovering the Forest - Red Trail	Mata de Barao de Sao Joao, Lagos	12km/4hr	Lagos Municipal Council	Via Algarviana
Loop - walk	Discovering the Forest - Lilac Trail	Mata de Barao de Sao Joao, Lagos	6km/2hr	Lagos Municipal Council	Via Algarviana
Loop - walk	Foia Trail	Foia, Monchique	7km/2hr30	Monchique Municipal Council	Via Algarviana
Loop - walk	Lagoao Trail	Sao Marcos da Serra, Silves	10km/3hr30	Silves Municipal Council	Via Algarviana

Type of walk (loop/linear)/User (walk/MTB/horse)	Name	Town/Municipality	Distance/Time	Responsibility	Associated Long Distance Trail
Loop - walk	Masmorra Trail	Mealha, Tavira	5.5km/2hr	In Loco Association and Tavira Municipal Council	No
Loop - walk	D.Quixote Trail	Casas Baixas, Tavira	17km/6hr	In Loco Association and Tavira Municipal Council	Via Algarviana
Loop - walk	Reserva Trail	Feiteira, Tavira	5.2km/2hrs	In Loco Association and Tavira Municipal Council	Via Algarviana
Loop - walk	Barranco das Lajes Trail	Cabanas, Sao Bras de Alportel	5.5km/2hr	Sao Bras de Alportel Municipal Council	No
Loop - walk	Between Valleys, Springs and Memories of the Serra do Caldeirao	Parises, Sao Bras de Alportel	20km/7hrs	Sao Bras de Alportel Municipal Council	No
Guadiana					
Loop - walk/MTB	Uphill, downhill	Vaqueiros, Alcoutim	13km/4hr30	Odiana Association and Alcoutim Municipal Council	Grande Rota do Guadiana
Loop - walk/MTB	Ladeiras do Pontol	Miradouro do Pontal, Alcoutim	13.5km/4hr30	Odiana Association and Alcoutim Municipal Council	Grande Rota do Guadiana
Loop - walk	Flow Flow, Guadiana	Laranjeiras, Alcoutim	8.5km/3hr	Odiana Association and Alcoutim Municipal Council	Grande Rota do Guadiana
Loop - walk/MTB	Terras da Ordem Trail	Terras da Ordem National Forest, Castro Marim	12.5km/4hr	Odiana Association and Alcoutim Municipal Council	Grande Rota do Guadiana

Type of walk (loop/linear)/User (walk/MTB/horse)	Name	Town/Municipality	Distance/Time	Responsibility	Associated Long Distance Trail
Loop - walk/MTB	Amendoeira Trail	Alta Mora, Castro Marim	11km/4hr	Odiana Association and Alcoutim Municipal Council	Grande Rota do Guadiana
Loop - walk/MTB	A window on the Guadiana	Azinhal, Castro Marim	7.5km/2hr30	Odiana Association and Alcoutim Municipal Council	Grande Rota do Guadiana
Linear - walk/MTB	Venta Moinhos salt-marsh Trail	Interpretation Centre, Castro Marim	7km/2hr	Nature Reserve of the Castro Marim and Vila Real de Santo Antonio Salt Marsh and the Castro Marim Municipal Council	Grande Rota do Guadiana
Loop - walk/MTB	Boa Vista Trail	Corte Antonio Mountains, Vila Real de Santo Antonio	9km/3hr	Odiana Association and Alcoutim Municipal Council	No

Figure 49: Walks & BTT routes developed and managed by Odiana Association

	Name	Location	Distance	Mode	Link with Long Distance Trail
Alcoutim					
PR1	Corre, Core Guadiana	Larenjeiras	8km	Walk/BTT	Grande Rota do Guadiana
PR2	Ladeiras do Pontal	Alcoutim	14km	Walk/BTT	Grande Rota do Guadiana/Via Algarviana
PR3	Os Encantos de Alcoutim (The Delights of Alcoutim)	Alcoutim	4km	Walk/BTT	Grande Rota do Guadiana/Via Algarviana
PR4	Caminhos da Fonte (The Fountain Route)	Aldeia do Pereiro	10km	Walk/BTT	No
PR5	O Vicoso	Gioes	12km	Walk/BTT	No
PR6	Memoria Viva (Living Memory)	Martinlongo	13km	Walk/BTT	No
PR7	Cerro Acima, Cerro Abaixo (Up the Hill, Down the Hill)	Vaqueiros	13km	Walk/BTT	No
PR8	Em Busca do Vale Encantado (In Search of the Enchanted Valley)	Vaqueros	13km	Walk/BTT	Via Algarviana
Castro Marim					
PR1	Do Passado ao Presente (From the Past to the Present)	Castro Marim	3km	Walk/BTT	Grande Rota do Guadiana
PR2	Circuito do Beliche (Circuit of Beliche)	Beliche	7km	Walk/BTT	No
PR3	Uma janela para o Guadiana	Azinhai	6km	Walk/BTT	Grande Rota do Guadiana

	Name	Location	Distance	Mode	Link with Long Distance Trail
PR4	Odeleite de Perto e de Longe	Odeleite	11km	Walk/BTT	Grande Rota do Guadiana
PR5	Terras da Ordem	Odeleite	12km	Walk/BTT	Grande Rota do Guadiana
PR6	Canaviais Barranco do Ribeiro	Corte Pequena	7km	Walk/BTT	No
PR7	Caminhos da Cabra Algarvia	Cruz de Alta Mora	15km	Walk/BTT	No
PR8	Caminho da Amendoeira	Cruz de Alta Mora	11km	Walk/BTT	No
Vila Real Santo Antonio					
PR1	Boa Vista	Corte Antonio Martins	10km	Walk/BTT	No
PR2	Quintas de Cacela	Villa Nova de Cacela	7.5km	Walk/BTT	No
PR3	Passeio Pombalino (Pombaline Walk)	Villa Real do Santo Antonio	3km	Walk	Grande Rota do Guadiana/Ecovia do Litoral

Figure 50: Walks developed and managed by In Loco Association

	Name	Location	Distance	Mode	Link with Long Distance Trail
PR1	Don Quixote Walk	Casas Baixas	16.9/10.5km	Walk	Via Algarviana
PR2	Fonte da Zorra Walk	Casas Baixas	5km	Walk	Via Algarviana
PR3	Montes Serranos Walk	Casas Baixas	9km	Walk	Via Algarviana
PR4	Cerros da Sobro Walk	Feiteira	14.3km	Walk	Via Algarviana
PR5	The Reserve	Feiteira	6km	Walk	Via Algarviana
PR6	Malhanito	Feiteira	9km	Walk	Via Algarviana
PR7	Vale das Hortes	Mealha	13.5km	Walk	No
PR8	Masmorra	Mealha	6km	Walk	No
PR9	Burial Chamber of Pedras Altas	Mealha	10km	Walk	No

Figure 51: Walks developed by Loule Municipal Council

Name	Location	Distance	Mode
Pe do Coelho	Pe de Coelho	8.5km	Walk
Rocha da Pena	Pena	5km	Walk
Barranco do Velho	Barranco do Velho	5.5km	Walk
Tor	Tor	5km	Walk
Querenca	Querenca	9km	Walk
Fonte Benemola	Querenca	4.5km	Walk
Azinhal dos Mouros	Azinhal dos Mouros	13km	Walk
Revezes	Ameixhal	12.5km	Walk
Montes Novos	Montes Novos	9km	Walk
Vale da Rosa	Vale da Rosa	9km	Walk
Parque Natural da Ria Formosa	Quinta do Lago	9km	Walk

4.4.3. Town Trails

There are town trails in Loule, Faro and Villa Real de Santo Antonio which have some information available in terms of printed maps but have not been signposted. **Given the historical natural of many cities and towns in the Algarve there is significant potential for the development of historic town trails.**

4.5. Critical Evaluation of Facilities and Product Providers

4.5.1. Visitor Accommodation

There is a wide range of visitor accommodation in the Algarve. This includes

- Hotels
- Self-catering
- Privately owned holiday homes and apartments

The number and locations of hotels are shown below in Figure 52. This shows the primary hotel accommodation centres are Albureria/Olhos d'Água, Lagos, Vilamoura/Quarteira, Monto Gordo, Portimao, Faro, Alvor, Carvoeiro, Almancil, Porches and Monchique.

Observations are that, as expected the greatest concentration of accommodation is located along the southern coast and primarily between Quarteria/Vilamoura and Lagos. Albureria/Olhos d'Água has the greatest concentration of hotels with 52 hotels and resorts.

Figure 52: Hotels and Resorts in the Algarve

Area	1* Hotel	2* Hotel	3* Hotel	4* Hotel	5* Hotel	3* Resort	4* Resort	5* Resort	Total
Albufeira		8	12	13	2	1	4	2	42
Lagos		3	4	4	2				13
Vilamoura				4	7		1	1	13
Monto Gordo			9	2					11
Portimao		3	2	3	1			1	11
Faro	1	5	2	2					10
Olhos d'Água			4	4	2				10
Quarteira			6	2					8
Alvor				6	2				8
Carvoeiro				5	2				7
Almancil			1	3	2				6
Porches	1	3		1	1				6
Monchique			2	1	1			2	6
Sagres		1	3	1					5
Praia da Rocha		2	2	1					5

Area	1* Hotel	2* Hotel	3* Hotel	4* Hotel	5* Hotel	3* Resort	4* Resort	5* Resort	Total
Tavira			3	1					4
Olhão					3				3
Quinta do Logo			1	1	1				3
Armação de Pêra				2				1	3
Aljezur		2							2
Altura		1		1			1		2
Loule	1		1						2
Praia Verde				2					2
Vila Real de S. Antonio			1	1					2
Alcantarilha							1		1
Alte			1						1
Boliqueime		1							1
Burgau			1						1
Estrela do Vau				1					1
Faro Aeroporto			1						1
Ferragudo				1					1
Luz				1					1
Manta Rota			1						1
Moncarapacho				1			1		1
Montechoro				1					1
Montenegro (Faro)			1						1
Pechão	1								1
Praia do Carvoeiro				1					1
Praia do Vau		1							1
Rogil		1							1
Salema			1						1
Santo Estevão - Tavira	1								1
São Clemente	1								1
Silves			1						1
Vale do Lobo					1				1
Vila do Bispo					1				1
Total	6	31	60	67	29	1	8	7	

Source: Turismo do Algarve

4.5.2. Visitor information centres

There are 20 visitor information centres in the Algarve, operated by Turismo do Algarve. These are located at:

- Posto de Informação Municipal de Faro
- Turismo de Aeroporto Internacional
- Posto de Informação Municipal de Lagos
- Posto de Informação Municipal de Querença
- Posto de Informação Municipal de Salir
- Posto de Informação Municipal de Albufeira
- Posto de Informação Municipal de Portimão
- Posto de Turismo de Alcoutim
- Posto de Turismo de Castro Marim
- Posto de Turismo de Monchique
- Posto de Turismo de Sagres
- Posto de Turismo de São Brás de Alportel
- Posto de Turismo de Silves
- Posto de Turismo Loulé
- Posto de Turismo Tavira
- Posto de Turismo Vila Real de Santo Antonio
- Posto de Turismo de Carvoeiro
- Posto de Turismo de Praia da Rocha
- Posto de Turismo de Lagos
- Posto de Turismo de Aljezur

Many of these close for long lunch breaks and the quality of information on offer and local knowledge with regards to the cycling and walking product offer varies between each office.

In many office visitors are not being advised to complete the Ecovia do Litoral due to its incompleteness. In general for walking trail information walkers are being referred to the Turismo do Algarve walking trail publication which has several issues, please see section 2.5.2 above.

4.6. 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 who have 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 many 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 INCF; 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 official print publication for walking trails is not fit for purpose.** 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.
- **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 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 Perurso 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 to the right 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 below in Figure 53 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 trails of the trails that were reviewed that were managed by INCF are significantly underfunded and require investment in signage and trail quality.



Figure 53: 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	***	*	*	*	*
	26	17	15	13	9

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

4.7. Cycling Routes Conclusions

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.** It has many of the attributes of popular European cycling destinations like Mallorca with a variety of topography and a better year-round climate.
- At the moment the potential of cycle tourism has not been reflected in the regional marketing campaigns, nor has there been but 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-bikes 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 Alentjo 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 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 Villa Real do S. Antonio and Alcoutim.

- 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 Olhao 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 Loule 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 (see Switzerland case study in section 3.3 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.
- 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 54, 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. 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 54: 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	**	*	*	*	*
	24	17	15	11	13

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

5. Best Practice Case Studies

5.1. Mallorca, Spain

As a visitor destination Mallorca shares many of the Algarve's attributes – good climate, local culture, mountains and a variety of flora and fauna. It is easily accessible from a range of European Airports and has been a popular sun sand and sea destination for over 40 years. Over the last decade the local authority, Govern de les Illes Balears, have invested in the development of walking routes, cycling routes and associated signage. This has been in response to demand and to provide more activities outside the summer months.

While **walking** is a popular activity on Mallorca there is poor quality information available on official websites such as www.visitmallorca.com with the private sector website www.seemallorca.com offering a greater range of information. Walking routes range from a variety of local routes to longer trails in the Serra de Tramuntana mountain range along the west coast of Mallorca. The GR221 Ruta de Pedra en Sec or Dry Stone Route is a long distance 150km trail from Port d'Andratx in the south west of Mallorca, to Pollença in the north-west. The Consell de Mallorca (Council of Mallorca) has invested money in renovating hostels at the end of each stage to give walkers a place to stay for the night.

Road cycling has become increasingly popular on Mallorca. One of the biggest draws, aside from the climate and landscape is the excellent road network of 1,250km with 675km of secondary roads that offer varied itineraries with limited traffic, offering safe cycling. The cycling season begins in February and is busiest until May but most cycle shops are open until October. Most international professional cycling teams use Mallorca as a training base in the winter months. There are a network of fully marked cycle-touring routes with information panels located at points of interest on the way. There are also road-side signs at major climbs to announce the gradient and length of the road ahead. The www.seemallorca.com website has details on a range of cycling routes. The Mallorca312 is a non-competitive annual long distance race around the perimeter of the island. This is the longest track in Spain and takes 14 hours to complete. This well-organised race has a comprehensive website and includes details of accommodation³⁰. In 2012 there were 1,143 participants from 13 countries with a combined economic impact of €2.1m.³¹

³⁰ http://en.mallorca312.com/recorrido_312

³¹ Sporting events as powerful drivers of tourism economies: the case of the Mallorca312, Iberostar Play de Muro presentation to International Cycling Congress, 6-8 February, Palma de Mallorca

Figure 55: Route of Mallorca312



Figure 56: Mallorca Cycle Path



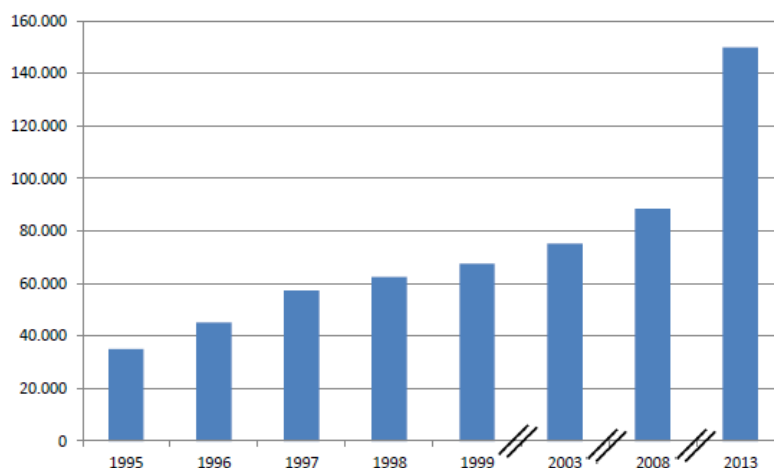
Mallorca offers many opportunities for **mountain biking** from high mountain trails, lush oak forests to secluded beaches only accessible on a mountain bike. As with walking and road cycling there is **no** overall map provided by the regional tourism agency and finding trails in the past has been difficult with many trails on private land or impossible to ride. There are several companies providing open-source information on trails and tour operators providing guided holidays. In recent years there have been issues with landowners preventing access for mountain-bikers.

Visitor data:

- There is no official data available for the numbers of visitors participating in walking or cycling in Mallorca or the Balearic Islands as a whole. The total number of visitors to the Balearic Islands in 2013 was 12.293m with 9.454m of these going to Mallorca with revenue of €8,672m and a daily average spend of €109.
- In 2012 there were 1.7m people engaging in outdoor activity in the Balearic Islands (e.g. cycling, hiking, sailing, golf). Average daily spend was €104.8 and average stay was 8.4 days.

- In 2014 there were estimated to be around 150,000 cycle tourists, the primary market is Germany plus UK, Switzerland, Benelux countries, Scandinavia, France, Spain³².
- The average age of cycle tourists is 30-50, 70% are men, 65% are graduates³³
- Value of cycle tourism is around €145m/year with an average spend of €106/day.
- There were one million overnight stays in hotels with Palma and Alcudia where most cyclists are accommodated. These range from professional cyclists coming to train to touring cyclists on holiday.
- Main months for cycle tourism are March-May (70%) and September-February (25%)³⁴.
- The numbers of cyclists coming to Mallorca each year has risen significantly over the last decade from less than 60,000 p.a. in the late 1990's to over 100,000 p.a. in the last 5 years.³⁵

Figure 57: Number of Cycling Tourists in Mallorca



- Revenue from all visitors has increased over the last decade but average daily spend from cycle tourists is significantly higher than the average visitor and has remained so over the last 15 years.

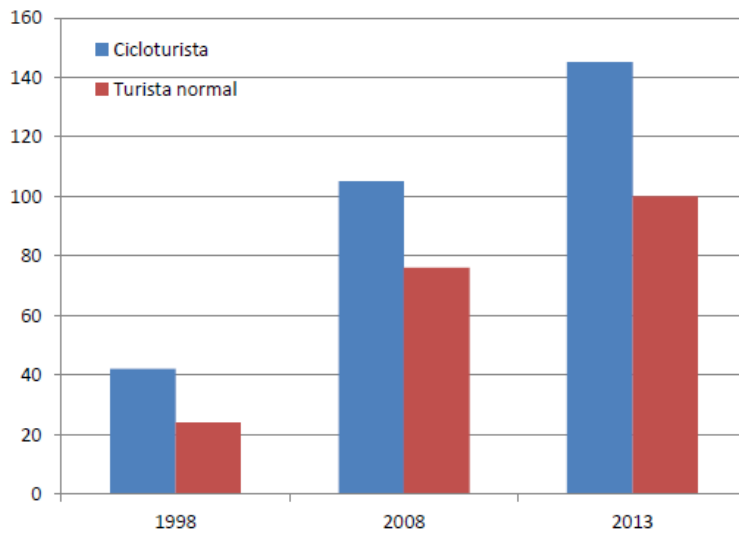
³² Impact of Cycling in Mallorca and the case of the Mallorca312, Alexandra Alemany, cited in presentation to International Cycling Congress, 6-8 February, Palma de Mallorca

³³ Ibid

³⁴ Ibid

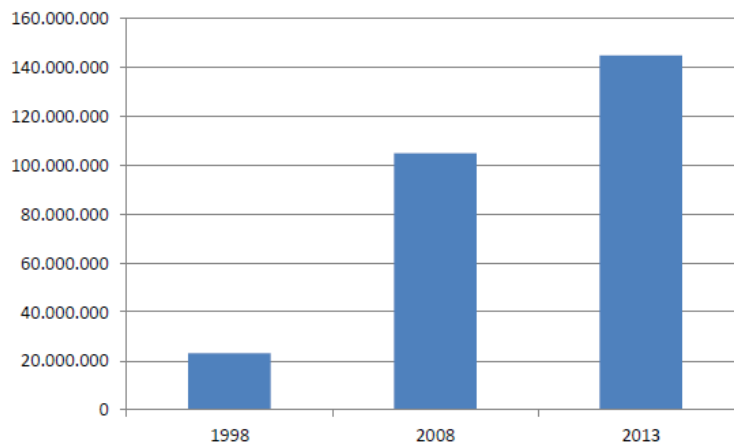
³⁵ Ibid

Figure 58: Average Spend of Cycling Tourists in Mallorca euros/day



- The economic impact from cycle tourism has increased from less than €20 million p.a. in the late 1990's to over €100 million p.a. in the last 5 years.

Figure 59: Total Economic Impact of Cycling Tourism in Mallorca (Euros)



Key issues and findings concerning Mallorca:

- **Cycling has a positive effect during the low season** and economic impact is spread all over the island³⁶.
- **Reasons for increase in cycle tourism in Mallorca** as are said to be – an increase in outdoor adventure activity, particularly cycling; an exponential increase in numbers of cyclists in the UK; increase in cycling amongst those with higher incomes; establishment of training camps in the Algarve; establishment of 2nd holiday period in Germanic countries.³⁷

³⁶ Ibid
³⁷ Ibid

- **Strengths of Mallorca as a cycling destination** are said to be: weather, road network, terrain, geographical location, good communications, tourist enterprises, hotel infrastructure, cycling tradition, other activities³⁸.
- **Weaknesses of Mallorca as a cycling destination** are said to be: lack of promotion and policy coordination, road safety, poor private sector interaction, lack of cycle touring companies³⁹.
- **Opportunities for Mallorca** are said to be consolidation of existing markets and development of new ones, creation of expert committees and expert teams, improving and standardising signage, developing attractive events, engaging use of internet for promotion, innovative use of cycling 2.0 (e.g. use of Strava or bikemap.net), using social media to make contact with overseas cyclists, quantifying numbers, building content (websites, books, guides)⁴⁰.
- **Lack of information:** The official tourism website offers a poor selection of routes and no maps for walking or cycling⁴¹.
- **Lack of data:** There is no available data for funding for trail investment, maintenance, promotion, or for local economic benefit. There is also no quantitative data regarding visitor numbers⁴².
- **Weaknesses of Mallorca as a cycling destination** are considered to be: road safety; lack of cooperation with private sector; poor tourism promotion; legal issues with use of MTB trails due to trespass laws.

³⁸ Impact of Cycling in Mallorca and the case of the Mallorca312, Alexandra Alemany, cited in presentation to International Cycling Congress, 6-8 February, Palma de Mallorca

³⁹ Impact of Cycling in Mallorca and the case of the Mallorca312, Alexandra Alemany, cited in presentation to International Cycling Congress, 6-8 February, Palma de Mallorca

⁴⁰ Impact of Cycling in Mallorca and the case of the Mallorca312, Alexandra Alemany, cited in presentation to International Cycling Congress, 6-8 February, Palma de Mallorca

⁴¹ <http://www.illesbalears.es/ing/majorca/hiking.jsp?SEC=SEN>

⁴² Cycling as a Tourist Offer in Mallorca, Xisco Lliteras, Iberostar Playa de Muro, cited in presentation to International Cycling Congress, 6-8 February, Palma de Mallorca

5.2. Switzerland

Switzerland is popular and well organised cycling and walking destination. The scenery and accessibility for the major population centres of Europe are likely play a strong role in this. However the provision of high quality information enables many to find all they need to know to plan their trip.

The first place many one would come to is www.myswitzerland.com, the main visitor portal for the country. This includes information on all leisure activities, for example under 'Hiking' visitors are presented with all trails available (498)⁴³. These can then be sorted and refined by a variety of measures such as sliding filters for time (up to 2hrs to more than 6hrs) or difficulty (from easy to difficult). Filters can also be applied for the '32 most enjoyable hikes' or 'seasonal hiking', or 'family friendly hikes' or a combination of these. Also provided on the page for each walk is information about the destination including events, accommodation – which can be booked through that page, and public transport including rail timetables. www.wanderland.ch is the official site for all national and local hiking and cycling routes in Switzerland. There are now over 34,000km of SwitzerlandMobility routes.



Walking routes are divided into national routes (7), regional routes (64), local routes (265) and also include obstacle free routes (67). Visitors can search for information by destination and for selected hikes, such as Top32 walks, family hiking tours. The hiking page on www.wanderland.ch also includes information on: Bookable offers,

⁴³ <http://www.myswitzerland.com/en-us/interests/hiking1.html>

Accommodation, Places of interest, Rail, bus, boat recommendations, Guides and maps, Places.



The www.wanderland.ch website provides comprehensive information on **cycling** including national routes (9), regional routes (55), and local routes (68). Visitors can also search by destination and for selected tours such as e.g. E-bike tours, tours with a rented bike, family cycling tours, tours near water, cycling in Swiss parks. The cycling page also includes information on: Bookable offers, Accommodation, Bicycle and E-Bike rental, Publibike, Cycle service, Places of interest, Rail, bus, boat recommendations, Guides and maps, Places.



The information on the same site for **mountain-biking** is equally comprehensive with information on national routes (3), regional routes (16), local routes (180) and MTB structures such as parks and downhill runs.

Visitor Data: The following findings are a selection from a survey carried out in 2014⁴⁴:

- Hiking is extremely popular in Switzerland. 44% of the resident population state that hiking or mountain hiking is a sporting and physical activity that they engage in. When extrapolated to the residential population, this gives a figure of



⁴⁴ Wandern in der Schweiz 2014

approximately 2.7 million people who go hiking.

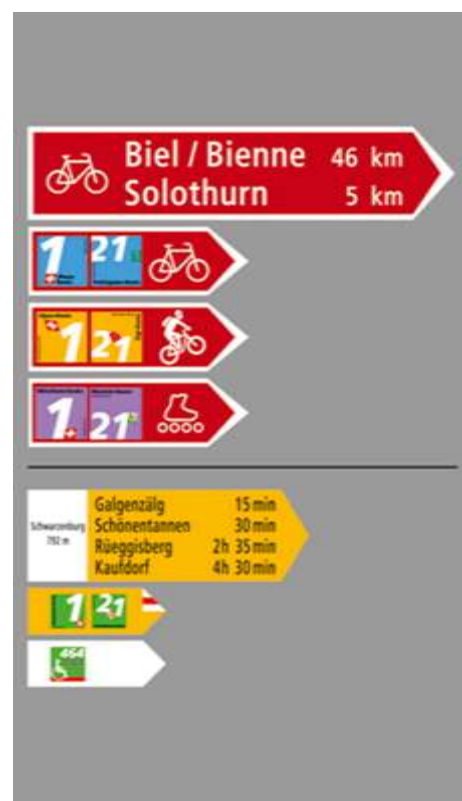
- In addition to Swiss-domiciled walkers, foreign guests also go hiking in Switzerland. Based on rough estimates, it can be assumed that around 300,000 hikers from abroad come walking here every year.
- By far the most widely-used means of finding one's way is still the signposts and markings on the ground. One hiker in six finds their way by using maps. Only a small group uses mobile devices with GPS or Smartphone apps to find their way when hiking.
- The importance of the Internet as a source of information has clearly increased over the last six years. More than half of the hikers who have deliberately chosen a hike on a Hiking in Switzerland route use the Internet or aids such as the SwitzerlandMobility app or the SwitzerlandMobility card. One fifth of these hikers obtain information by using a hiking guide book. There are a range of other information available on the internet⁴⁵.
- Hikes rarely extend over several days (about 2% to 4% of all hikes). Multi-day hikes are much more frequent in the vacation areas than in the day-trip or local recreational areas. Half of all multi-day hikes last no longer than two days.
- At least one third of hikes do not last longer than 2 hours. This would suggest that walking for local recreation plays an important role.
- During a hike in Switzerland, an average of CHF 45 is spent per person per day (incl. any overnight accommodation expenses). Expenses on meals and the outward and re-turn journey account for the largest share of hiking costs. Every year, an average Swiss hiker spends about CHF 860 on hiking (not counting any expenses for items of equipment). The turnover generated by hiking in Switzerland is about CHF 2.5 billion (incl. foreign guests, but excluding items of equipment), of which nearly CHF 500 million are generated by overnight stays.
- Hikers attach particular importance to beautiful landscapes, experiencing nature and recreation while hiking. In terms of infrastructure, constant signposting with walking times indicated at regular intervals, footpaths with a natural surface and varied and well-maintained footpaths are deemed particularly important. In addition, more than 60% also think that restaurants and guest houses and being able to travel to the point of departure by public transport are important or very important. Most hikers are very satisfied with these aspects.

⁴⁵<http://www.swisstrails.ch>, individual long distance trails with organized accommodation and luggage transfer; <http://www.swisstopo.admin.ch>, Swiss hiking maps; <http://www.gps-tracks.com>; descriptions with maps and GPS

Key Issues and Findings concerning Switzerland:

This case study of the most popular cycling and walking destination in Europe is important as it shows the **high standard of comparative information provision** i.e. the level of information provision that many visitors might be used to having visited Switzerland. There are a range of innovative approaches here:

- Provision of information:** The level of information is very detailed. Visitors can view all trails on a national map and drill down to a local level; clicking on a trail at a local level brings up the name or name & stage of that trail; clicking on the trail takes the user to the trail information including photos, accommodation and transport. The website www.switzerlandmobility.ch provides information on SwitzerlandMobility routes and services in German, French, Italian and English. All SwitzerlandMobility routes and all other signalized hiking trails in the country (about 65,000 km) are shown on a scale of up to 1:50,000 on high-quality swisstopo maps and can be printed out free of charge. The official SwitzerlandMobility route guides have descriptions of national and regional routes and services in German and French, with some also in English. While the provision of information on the internet is important for people to choose routes signposts are the most important means for a visitor to find their way on the ground. Apps are also important. GPS/smartphone apps are important for a minority.
- Signage:** The signalization of SwitzerlandMobility routes is standard throughout Switzerland. It is based on Swiss norms for signalization of non-motorized traffic (SN 640 829). It was revised for the realization of SwitzerlandMobility and today is the only international norm for standard signalization of non-motorized traffic. The yellow signs for hiking trails, white signs for the barrier-free routes and red for cycling, mountain biking and skating routes were supplemented for SwitzerlandMobility with the addition of route information panels including route names and numbers. One-digit numbers indicate national routes, two-digit numbers indicate regional routes and three-digit numbers indicate local routes.
- Bookable offers:** The SwitzerlandMobility Marketing Group (SwitzerlandMobility MG) is responsible for bookable offers for SwitzerlandMobility, supported by regional Swiss tourism organizations and numerous enterprises that provide services for bookable offers.
- Bike rental:** As a SwitzerlandMobility partner, Rent-a-Bike offers the hire of a wide range of cycles and mountain bikes at over 100 cycle-rental points



throughout Switzerland, usually at railway stations. Some points also offer hire of electric cycles, tandems etc. All cycles hired at one Rent-a-Bike point can be returned to any other Rent-a-Bike point.

- **Overnight accommodation:** Many hotels, camping sites, private rooms, youth hostels and farms have been awarded the SwitzerlandMobility Foundation quality label and are partner enterprises (about 1500).
- **Integration with public transport:** The national and regional route network is divided into one-day stages. Over 500 places are defined as stage destinations, which can be reached by train, postbus, boat or aerial cableway. This means that individual stages can also be used as day excursions. All public transport stops which are included in official timetables (about 18,000) are shown together with the routes on the SwitzerlandMobility interactive internet map, linked to the online timetable.
- **Management:** Switzerland Mobility is an example of integrated goal-orientated management. Switzerland Mobility was launched in autumn 2004 with a contracting body comprised of various Swiss federal departments, the Swiss cantons, the Principality of Liechtenstein and many organizations from traffic, sport and tourism. Thanks to strong teamwork, the SwitzerlandMobility Foundation was able to successfully launch SwitzerlandMobility in spring 2008, after three years realisation work. The cost of this was 12.5mCHF (€11.5m).

5.3. Loire a Vélo, France

The Loire à Vélo is one of the premier long distance cycle routes in France and is now a key part of Eurovelo 6⁴⁶ which runs 3,600km from the Black Sea to the Atlantic. The concept arose for Loire a Vélo arose in 1995 and was quickly supported by the two regional authorities – Centre and Pays de la Loire – who soon brought together the 6 departments crossed by the route (Cher, Loiret, Loir-et-Cher, Indre-et-Loire, Maine-et-Loire and Loire-Atlantique) as well as its major cities: Orléans, Blois, Tours, Saumur, Angers and Nantes.

Between them the local authorities contributed €52m of finance to develop and signpost the 800km route. It took the Centre-Val de Loire and Pays de la Loire Regions over ten years to create, signpost and develop the route, starting in Cuffy (Cher) and finishing in Saint-Brévin-les-Pins (Loire-Atlantique). The first section between Angers and Tours was opened in 2005. In 2014 the route was used by 956,000 cyclists who cycled 28.3 million kilometres along the Loire à Vélo route with €19.8 million of direct economic benefit.



Key issues and findings concerning Loire a Vélo: There are a number reasons for the success of Loire a Vélo including:

- **Provision of a high quality network:** La Loire à Vélo alternates between quiet roads with little traffic (37%), green ways (27%), no-thoroughfare roads (24%), cycle tracks and lanes (12%). Two-thirds of the itinerary runs along the Loire. There are 300 stopping places for cycle tourists for picnics/lunch.
- **Good signage:** The route is comprehensively sign-posted in both directions which makes it very suitable for family trips. This has been so successful that guide-books now focus explaining what there is to do (landscapes, history and heritage) rather than showing the way.

⁴⁶ www.eurovelo6.org

- **Use of branding to ensure service quality:** The name terms 'Accueil Vélo' and 'La Loire à Vélo' has been trademarked and branded logos produced to be used by associated businesses which reach a minimum service standard and by tourist information offices. These now include 536 businesses including 380 accommodation facilities, 20 bike rental businesses, 93 attractions and 43 Tourist Offices. The Accueil Vélo (Cyclists Welcome) partners bearing the brand are always located less than 5 km from the cycling route. For example accommodation providers ensure baggage arrives to the following night's accommodation; give advice; provide laundry facilities, facilities for washing, repairing and storing bikes; and provide early breakfasts. Along the whole



route, a network of twenty 'Accueil Vélo' branded bike rental companies provide equipment and services tailored to cycle tourists. Some offer delivery of bikes to the local rail-station, as well as baggage transfer, and one way collection.⁴⁷

- **Making transportation easy:** Cyclists on the Loire a Velo route can stop and start their journey wherever they want. The Train Vélo Loire (Loire River Train & Bike) allows bikes to travel free of charge and without the need for reservations. In addition, cyclists travelling in either direction can transfer their luggage, equipment, bikes and vehicles between any places of accommodation located less than 15km on either side of the Loire a Vélo route.
- **Provision of a route for a variety of users:** The route and itinerary has been designed for a wide variety of users with recommended stages no longer than 40km, corresponding to a maximum of 4 hours cycling a day. This enables people to include picnic stops and cultural visits along the way.
- **Provision of high quality information:** The main website for the Loire à Vélo trail is the website operated by a collection of regional tourist organisations (<http://www.cycling-loire.com/>). This website provides a huge range of detail on every aspect of the trail such as highly interactive maps, itineraries, activities, heritage, accommodation, bike hire, baggage transfer, photos, video and even local weather. The website tab 'Sights along the itinerary' contains detailed information on various sights of interest such as Châteaux of the Loire, natural assets, gastronomy and wine, towns and villages of character, and gardens of the Loire, which are clearly presented with a photo & details of each place.
- The user can choose from 60 different itinerary options which include the path on Google Maps, along with its characteristics (duration, length, if it is a bike-only path or if it is shared with vehicles, etc.), information and pictures of hotels, restaurants and visits in the areas, etc. Each itinerary is presented with its own highlights, such as the heritage, landscapes and vineyards. Visitors can

⁴⁷ <http://en.eurovelo6-france.com/preparing-for-your-trip/the-cyclists-welcome-quality-mark>

also select a preferred itinerary, sharing pictures and video. The website provides links to a range of brochures & maps which can be downloaded or viewed online and which are available in local visitor information centres. The website contains detail of each of these centres and the type of information and services they offer.

- **Use of technology:** There is a dedicated Loire à Vélo app which uses GPS to navigate along the trail with embedded maps so users do not need an internet connection except when the app is first started to download the maps. The Loire à Vélo app includes all tourism product along the route, suggested itineraries, weather, roadmap, GPS geo-location, tips from professionals. The content-rich website is focussed towards cyclists and includes a wide range of detail to aid the planning and under-taking of a trip from getting to the area, hiring bikes, accommodation and baggage transfer. This makes it easy for visitors to plan a trip and to arrive with confidence. The app means that visitors can plan an exact itinerary in advance and use the app to visit heritage sites along the route.

5.4. Great Western Greenway, Ireland

The Greenway is located in County Mayo in the north-west of Ireland which, in recent years, has positioned itself as the adventure capital of Ireland. The 42km long Great Western Greenway is the longest off-road cycling and walking trail in Ireland. The traffic-free route mostly follows the line of the Newport-Mulranny railway which closed in 1937. The first 14km section opened in 2010 with an extension to 42km opening in 2011. Funding for the greenway came from the Irish government (Fáilte Ireland/Department of Transport/Department of Rural Affairs). The trail was only made possible by the agreement of local landowners who gave permissive access to users to pass through their lands. Mayo County Council secured access by taking leadership for the route in obtaining Permissive Access Agreements.

Figure 60: Location of County Mayo



Figure 61: Location of Great Western Greenway



Key issues and findings concerning the Great Western Greenway:

- **Provision of high-quality infrastructure attracts awards and media attention** with the Great Western Greenway winning an EDEN (European Destination of Excellence) award and 1st Prize at the European Greenways Association in Viseu, Portugal in 2013.
- **The Great Western Greenway has delivered real local economic benefits.** In the first year of the route being open an economic impact study was

undertaken by Fitzpatrick Associates⁴⁸ which found that the 145,000 people who used the trail contributed €7.2 million to the local economy (including €2.8m from overseas visitors, €3.5m from domestic visitors) and supported more than 90 jobs (38 new and 56 existing jobs).

- **Provision of this type of infrastructure provides opportunities for linkages and new businesses.** There are new trails alongside the greenway such as the Gourmet Greenway, now a popular food trail along the Greenway showcasing local artisan food, and Artists on the Greenway, an initiative of local artists and sculptors. There are opportunities for many new businesses such as bike hire, cycling and walking guided tours, hospitality services – food and drink, local shops, accommodation providers and taxi services. Typical packages include accommodation combined with bike hire, packed lunch and transport pick up.
- **Visitor data** from 2013 indicates most users are cyclists (78%), most are Irish 75.5% (overseas 24.5%, UK 9.5%); the greenway is popular with families (60% of users), 54% of users hired a bike. In 2013 there were 208,000 users with an average daily spend of €62/person/day.⁴⁹
- **Trends** show user numbers are growing each year from 145,000 in 2011 to 208,000 in 2013. There are more international visitors (16% 2012 compared to 24.5% in 2013); people are cycling longer journeys
- **It's important to provide good information for visitors:** The Great Western Greenway has its own dedicated website, www.greenway.ie, which includes trail maps, information on Things to See and Do (Outdoor Activities, Visitor Attractions, Greenway Towns), Accommodation, Bike Rental and Tours. There is also an app with high quality content, maps, GPS and product listings.
- The success of the Greenway has led to consideration of new opportunities including:
 - Development of the Eurovelo 1 Cycle route around the coast of Ireland (and down to Cape St Vincent)
 - Service centres to improve visitor facilities. These will include toilets and shower facilities, customer services, and an HQ for the Green Patrol who offer first aid response, customer care, and help to maintain and manage the Greenway.



⁴⁸Economic Impact of Greenway, Fitzpatrick Associates, 2011

⁴⁹ Mayo County Council 2014

- Development of a trail along the Galway/Mayo coastline that links water recreational activities.

Lessons⁵⁰

- Important to secure offers of funding in principle
- Securing landowner permission eliminated the need for a CPO (compulsory purchase order) for the route
- Completion of the route from Newport to Mulranny in 2010 as stage one of the routes, helped to ensure that the rest of the route was secured and developed
- Greenway Investment can leverage community & private buy in. Create momentum – but needs direction & co-ordination
- Work with the energy – others will follow. Huge strength in community.
- Greenways can re energise an area – bringing back that sense/pride of place
- Encourage to take the initiative / highlight the €€€
- Create experiences & packages
- Collaboration, collaboration & more collaboration.
- Success follows Success

⁵⁰ The Greenway Forward – Opportunities for Tourism, Mayo County Council, 2014

5.5. Rota Vicentina Association

The Rota Vicentina is a corridor of activity along the Costa Vicentina on the Algarve's west coast. The route consists of two main trails, the Fisherman's Trail which runs from Porto Covo in Alentjo to Odeceixe in the Algarve and its 5 complementary circuits, the Historical Trail which runs from Santiago do Cacem in Alentjo to Cabo Sao Vicente in the Algarve, and five circular routes. Rota Vicentina officially opened in 2012.

The Algarve's Rota Vicentina Association (www.rotavicentina.com) can be considered a relevant best-practice example with regards to its community based structure, funding mechanisms and recent achievements. This not for profit association has over 150 private sector members which include accommodation providers, tour operators and taxi companies. Membership fees are now almost double the amount of annual public sector funding from municipal councils meaning the RVA business model is becoming increasingly sustainable. Funding also comes from sponsorship e.g. Europcar.

Maintenance of the trail is underpinned by a strong volunteer network who sponsor a section of 20km+ and walk it twice a year, reporting problems or carrying out maintenance themselves. Significant maintenance is undertaken by the municipal councils.

The Rota Vicentina has very high quality directional, orientation and interpretation signage. There are 26 interpretation panels in villages - the start/end points of 22 sections and on 5 loop trails.



In 2015 Rota Vicentina Association launched a highly informative website with maps available to download in all formats for all sections including GPS, GPX and KMZ formats for use in Google Earth and Google Maps. High quality printed maps and guides are also available. Innovative features of the website include online booking facility for accommodation; and an itinerary planner linked to an algorithm that suggests an itinerary based on the user profile and length of stay.

Key issues and findings concerning Rota Vicentina:

- Innovative use of a private sector led association to drive development of a corridor of activity whose goal is to increase local economic benefit rather than increase user numbers

- There is no visitor data and this lack of visitor data makes prioritised investment difficult. Numerical, qualitative and carrying capacity monitoring would enable RVA to work with sponsors, media and EU funds – it would provide justification for investment. A baseline socio-economic study and carrying capacity study are essential.
- While the route has world class information provision it currently lacks an app to provide information on what can be seen and done.

5.6. Eurovelo Routes and European Long Distance Walking Routes

5.6.1. Eurovelo Routes

EuroVelo, the European cycle route network, was initiated by the European Cyclists' Federation (ECF) to develop a network of high-quality cycling routes linking all countries in Europe. The network can be used by long-distance cycle tourists, as well as by local people making daily journeys. The European Parliament, the European Economic and Social Committee and several European Union Member States have asked the European Commission to integrate EuroVelo into the Trans-European Transportation Network (TEN-T). EuroVelo

- is a network of European long-distance cycle routes
- currently comprises 14 routes
- is a project of the European Cyclists' Federation (ECF) in cooperation with the national EuroVelo coordination centres

One of the ECF's main goals is to ensure that the EuroVelo network is substantially complete by 2020.



The 14 EuroVelo routes, together with their total distance when complete, are:

North – South Routes:

- 1 – [Atlantic Coast Route](#): North Cape – Sagres 8,186 km
- 3 – [Pilgrims' Route](#): Trondheim – Santiago de Compostela 5,122 km
- 5 – [Via Romea Francigena](#): London – Rome and Brindisi 3,900 km
- 7 – [Sun Route](#): North Cape – Malta 7,409 km
- 9 – [Baltic – Adriatic](#): Gdansk – Pula 1,930 km
- 11 – [East Europe Route](#): North Cape – Athens 5,984 km
- 13 – [Iron Curtain Trail](#): Barents Sea – Black Sea 10,400 km
- 15 – [Rhine Route](#): Andermatt – Hoek van Holland 1,320 km

West – East Routes:

- 2 – [Capitals Route](#): Galway – Moscow 5,500 km
- 4 – [Central Europe Route](#): Roscoff – Kiev 4,000 km
- 6 – [Atlantic – Black Sea](#): Nantes – Constanta 4,448km
- 8 – [Mediterranean Route](#): Cádiz – Athens and Cyprus 5,888 km

Circuits:

- 10 – [Baltic Sea Cycle Route](#) (Hansa circuit): 7,980 km
- 12 – [North Sea Cycle Route](#): 5,932 km

Total network: Over 70,000 km

There are two main Eurovelo websites:

- www.eurovelo.org for nations and individuals working on developing the network
- www.eurovelo.com for information on the 14 routes

The eurovelo.org site hosts a variety of strategies, guidelines and best-practice. These include⁵¹:

- Eurovelo Development Strategy 2012-2020
- Guidance on the Route Development Process
- Eurovelo – Guidance on Usage Monitoring
- Examples of national best practice for Eurovelo websites e.g. Eurovelo 1 in France⁵² and the Cyclists Welcome standard in France (Accueil Velo)⁵³

Objectives of EuroVelo:

1. **Economic** – help create lasting economic growth with more and better jobs.
 - It is estimated that the network will generate €5 billion direct revenue per year if it is fully developed.
 - Strengthen the leading position of Europe amongst tourism destinations.
 - Establish and maintain cycling facilities that require larger work forces but less material.
2. **Environmental** - reduce the environmental impact of tourism and transport.
 - Promote cycling as an environmentally sustainable form of leisure and mobility activity.
 - Encourage cyclists to combine public transport and cycling.
 - Wherever possible use existing facilities. New facilities, where necessary, should have minimal impact on the environment.
 - Promote effective spatial and land use planning that allocates more space for cycling.
3. **Regional and rural development.**
 - Connect both famous and 'less well known' tourism destinations.
 - Improve the well-being of local communities by providing cycling facilities.
4. **European cohesion and mutual understanding.**
 - Remind citizens about the history, culture and nature of Europe through cycling.
 - Stimulate direct face to face interactions between people.
 - Encourage more women and families to take up cycling.
 - Provide opportunities for disabled people to use the routes.
5. **Public health** - Improve the health of European citizens.
 - Motivate the population to pursue healthy leisure and mobility activities.
6. **Exchange of experiences** – Stimulating and high quality cycle routes.⁵⁴

⁵¹ <http://www.eurovelo.org/downloads/guidelines/>

⁵² <http://www.velodysey.com/>

⁵³ <http://en.eurovelo6-france.com/preparing-for-your-trip/the-cyclists-welcome-quality-mark>

⁵⁴ Eurovelo Development Strategy 2012-2020, page 2

Expected conditions by 2020:

- Every section is located on low traffic public roads or on car free infrastructure with asphalted or good quality consolidated surface (i.e. it is possible for average users to ride the routes throughout the season with a loaded trekking / touring bike).
- On the most frequented sections, the road quality is improved to such an extent that the range of different user groups increases.
- Signing is in accordance with the regulations of the respective nations and/or regions and is continuous in both directions
- Signing is supplemented by EuroVelo route information panels, in accordance with the publication "Signing of EuroVelo cycle routes".
- Public transport companies connect the main nodes and provide bicycle transportation services as an alternative on mountainous sections or instead of roads with high levels of motorised traffic.⁵⁵

Route infrastructure components:

- Public roads: if the speed limit exceeds 30km/h, the road should not carry more than 2,000 motor vehicles per day, preferably under 500 vehicles. In exceptional circumstances public roads carrying up to 4,000 vehicle units per day may be used on a temporary basis. Shared lane marking, traffic reduction, calming measures and speed reduction can all contribute to improving safety. In urban areas and roads with high levels of motorised traffic, 30km/h speed limits are a good solution
- Cycle lanes separated from traffic, asphalted shoulders/cycle lanes besides public roads should not be located alongside roads carrying more than 10,000 vehicles units per day. In exceptional circumstances the shoulder may not be asphalted
- Segregated cycle paths
- Shared use cycling and pedestrian paths
- Bridges, subways and tunnels for cyclists and/or pedestrians
- 'Cycle streets' for intensive cycling traffic and low levels of motorised traffic
- Agricultural / forestry / water management roads
- Greenways⁵⁶

Signing principles:

- Signing of the EuroVelo routes should be in line with the relevant European and national standards and regulations
- The EuroVelo signing regulations should be integrated to national signing regulations
- Signs should be permanently visible for cyclists
- Signs should be easily understandable

⁵⁵ Eurovelo Development Strategy 2012-2020, page 6

⁵⁶ Guidance on the Route Development Process, page 5

- Adequate information should be provided at main junctions and border crossing points
- Preliminary information should be provided at complex junctions
- Confirmation signs should be provided after junctions
- Confirmation signs should be provided on long sections without junctions.

Components of the signing system:

- Upright signs mounted on posts, street furniture, walls etc, giving or confirming route direction and number (mandatory)
- EuroVelo signs, integrated with national and regional signage (mandatory)
- Road markings and simple signs (optional)
- Information boards to interpret the route and add interest to the trip (optional)
- Informative signage to places of interest, such as services and attractions, in the environment of the route (optional).⁵⁷

Surface

- The surface should be suitable for use by cyclists with any type of trekking or touring bike (mandatory), and preferably road racing bikes, children's bikes and bikes with trailers (optional), in normal weather conditions during the local cycling season (mandatory)
- The surface should be smooth and solid enough to ride, so it should either be asphalted or paved with another material, such as concrete, stone etc. In exceptional circumstances, such as a protected nature reserve, loose material may be used, but must be consolidated (mandatory)
- The preferred option is a good quality asphalted surface.

Gradients

- High gradients (more than 6% on longer sections; more than 10% on shorter sections) should be avoided wherever possible (optional)
- For daily sections that include more than a 1,000m elevation, alternative solutions (public transport with bike carriage or alternative routes) should be provided (mandatory).

Maintenance

- It is important to clarify maintenance issues before investment is made and routes are developed. The responsibility for the maintenance of the infrastructure depends on the type of infrastructure and the national regulations.

It may vary from one section to another. Maintenance plans should include surface maintenance, surface cleaning and control of vegetation encroachment

⁵⁷ Guidance on the Route Development Process, page 6

- Regular surveys of the route infrastructure conditions and the precise itinerary are necessary
- The maintenance of signing should be coordinated at the national or at least the regional level. It should include the repair and replacement of missing or damaged signs and posts.⁵⁸

Usage monitoring

The guidance for the collection and processing of data relating to cyclists using the EuroVelo routes includes:

- Quantitative monitoring – automatic counters, manual counting
- Qualitative monitoring - interviews and questionnaires
- Data entry, aggregation and breakdown
- Tasks and responsibilities⁵⁹

5.6.2. European Long Distance Walking Routes (E-Routes)

E-Paths are the European long distance paths which link the countries from North Cape to Crete and from the Atlantic Ocean to the Carpathians and the Black Sea. There are 12 E-Paths, bearing the name of E1 to E12. These E-Paths are waymarked and maintained by the members of the European Ramblers Association (ERA - EWV - FERP).

The E-Paths run on existing national or regional trails with their own marking. However, it has been agreed to identify them also with a uniform marking: a blue shield with the yellow stars of Europe, in the middle of which is the letter E and the corresponding number of the E-path. Under the shield is also included the website address of the European Ramblers Association.

E1 Nordkapp (N) – Salerno (I) 7.000 km

Nordkapp (N) – Göteborg (S) – Konstanz (D) – Lugano (CH) – Genua (I) – Salerno (I)

E2 Inverness (GB) – Nice (F) 4.850 km

Inverness (GB) – Hoek v Holland (NL) – Antwerpen (B) – Echternach (L) – Chamonix (F) – Nice (F)

E3 Santiago (E) – Nesebâr (BG) 6.950 km

Santiago (E) – Vézelay (F) – Echternach (L) – Fulda (D) – Zakopane (PL) – Ártánd (H) – Nesebâr (BG)

E4 Tarifa (E) – Larnaca (CY) 11.800 km

Tarifa (E) – Grenoble (F) – Budapest (H) – Beograd (SRB) – Sofia (BG) – Lanaca (CY)

E5 Pointe du Raz (F) – Verona (I) 2.900 km

⁵⁸ Guidance on the Route Development Process, page 7

⁵⁹ Eurovelo – Guidance on Usage Monitoring

Pointe du Raz (F) – Fontainebleau (F) – Kreuzlingen (CH) – Bregenz (A) – Verona (I)

E6 Kilpisjärvi (FIN) - Alexandroupolis (GR) 6.300 km

Kilpisjärvi (FIN) – København (DK) – Goslar (D) – Koper (SLO) – Alexandroupolis (GR)

E7 El Hierro (E) – Nowi Sad (SRB) 4.330 km

El Hierro (E) – Lisboa (P) – Andorra (AND) – Nice (F) – Ljubljana (SLO) – Nowi Sad (SRB)

E8 Dublin (IRL) – Svilengrad (BG) 4.390 km

Dublin (IRL) – Hull (GB) – Hoek v Holland (NL) – Bonn (D) – Wien (A) – Košice (SK) – Svilengrad (BG)

E9 Lisboa (P) – Tallin (EST) 5.200 km

Lisboa (P) – Brest (F) – Hoek v Holland (NL) – Lübeck (D) – Gdansk (PL)

E10 Nuorgam (FIN) – Bolzano (I) 2.880 km

Nuorgam (FIN) – Potsdam (D) – Praha (CZ) – Salzburg (A) – Bolzano (I)

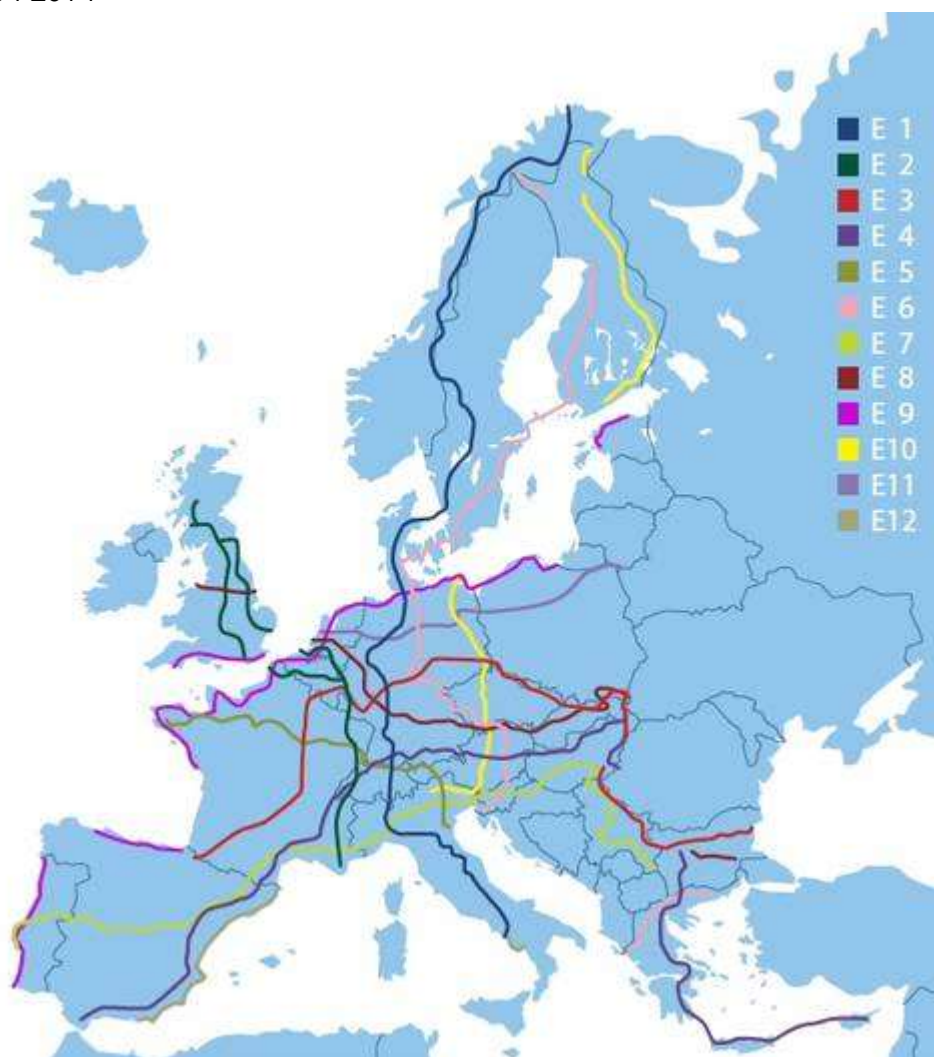
E11 Scheveningen (NL) – Ogrodniki (PL) 2.070 km

Scheveningen (NL) – Osnabrück (D) – Potsdam (D) – Poznań (PL) – Ogrodniki (PL)

E12 Ceuta (E) – 1600 km

Ceuta (E) – Barcelona (E) – Nice (F) – Genova (I) – Salerno (I)

01/04 2014



Leading Quality Trails

The European Ramblers Association have introduced a trail quality scheme, the Leading Quality Trails- Best of Europe' which is an award as well as a transparent method to optimise the overall route infrastructure. The criteria can be used as a checklist and help countries that have to build up their walking route network. In countries that already have a functioning route network, such a system can strengthen walking tourism further. The logo 'Leading Quality Trails- Best of Europe' is used on national as well as international trails. Certification is only available for complete trails. Prerequisite is a distance of at least 50km with three daily stages. Exceptions to the rule are the European Long Distance routes. They can be certified in part, as long as the minimum length is given.



Rota Vicentina Association are currently in the process of applying for award for sections of their trails.

Signage

In almost every country in Europe there is an E-path, normally marked with local (national) way-marks. It is not the aim to change all the local way-marks into European way-marks. Please, use the European way-marks supplementary, for instance 1 way-mark every 2 km, way-marks on important crossings and way-marks on special places, like at the start or end. If special signs are made with listing an E-path please do not remove this signs and leave them. If there is a 'local' way-mark only for the E-path please replace these marks with the European ones.



General Principles for Signing and Marking Footpaths

1. Waymarks should be placed in the direction of the route so that they are clearly visible from a distance
2. Waymarks should be positioned on an object so that the whole mark is visible from the point of view of the approaching walker, by ensuring that the surface of the mark forms an angle of more than 45° with the line of route.
3. The route should be waymarked in both directions, with two clearly separate marks. Each of these marks should be positioned with respect to one direction only.
4. Junctions are places where paths cross, join or diverge from each other. When carrying out marking, special attention must be paid to junctions where the walker could leave the marked path by mistake. For this reason, all junctions must be marked in both directions.

- A waymark indicating the correct direction should be placed no more than 10m after the junction so that it is clearly visible from the junction and indicates the change of direction unambiguously. This mark is called the guidance mark.
- Another mark should be placed a little further along the correct route. This is called the confirmation mark.
- 5. Long sections of routes without junctions should be provided with reassurance marks. The distance should not exceed 250m. This distance should be shortened in difficult or mountainous terrain.
- 6. If the marked route turns off on another path or changes direction suddenly, an arrow should be used, with the point of the arrow indicating the new direction.
- 7. Increased attention should be paid to the signing of routes in built-up areas, and in particular along sections leaving built-up areas.
- 8. Directional panels or fingerposts indicating the route of the marked path should be placed at the starting/ending points of the route, at junctions and at other necessary places along the route.
- 9. Fingerposts and directional panels should indicate one or more destination along the marked route and the distance in km (miles) or hours. If a destination is shown on a fingerpost or panel, it must be shown on all other subsequent fingerposts or panels until the destination itself is reached.

ERA-EWV-FERP 2015

Details on how to decide on a new section of E-path

<http://www.era-ewv-ferp.com/walking-in-europe/e-paths/new-e-paths/>

5.7. Key Findings and Conclusions

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.

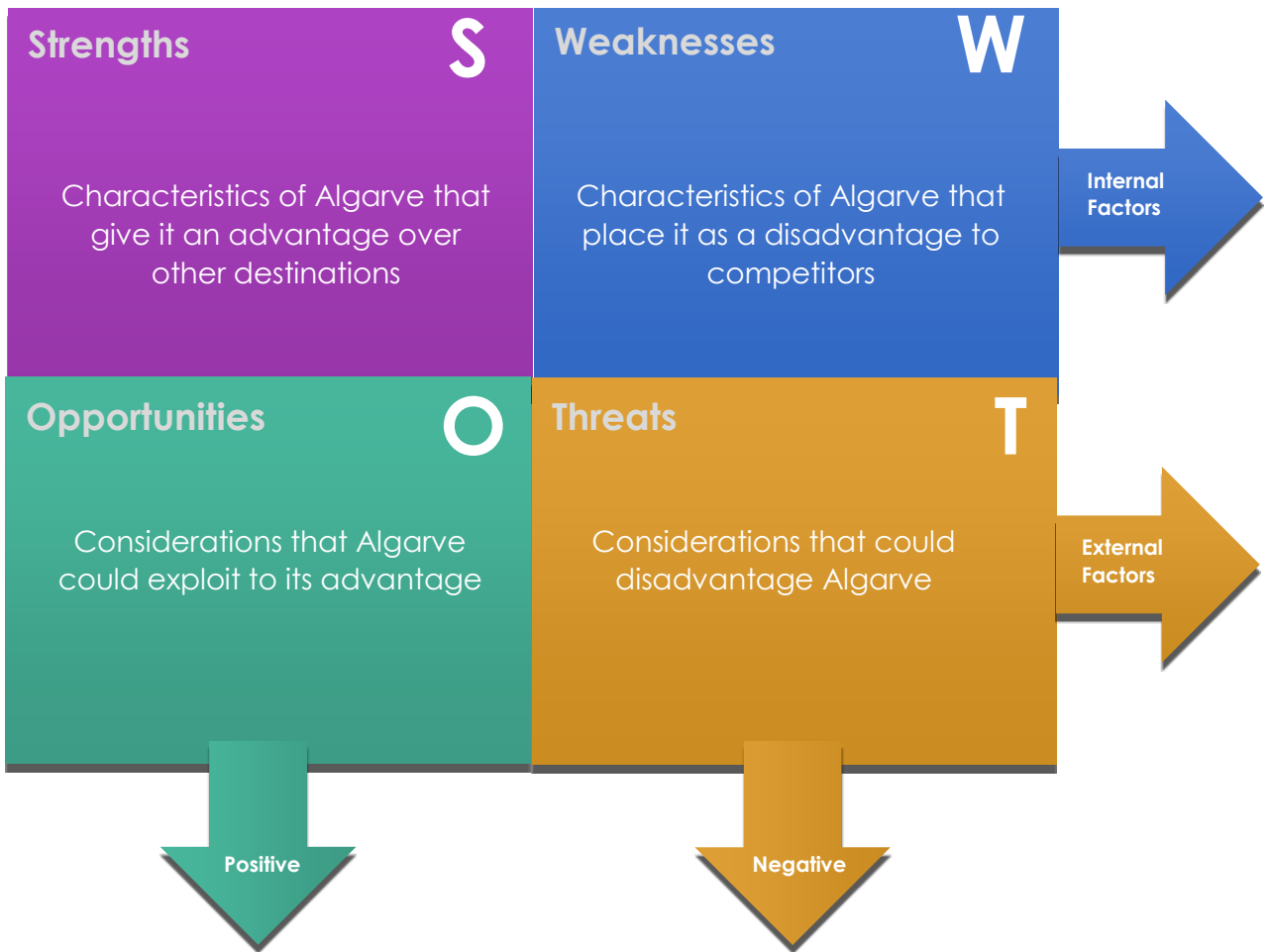
Overall there are a range of key findings from the best-practice case studies. These include:

- **Provision of high quality integrated information through websites, maps, apps, signage 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.

6. 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.



6.1. 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);
- **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.

6.2. 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.

6.3. Opportunities

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

Opportunities



Considerations that Algarve could exploit to its advantage

- [Ecovia do Litoral](#) – phased development as world-class greenway for cycling and walking; integration with Eurovelo routes;
- [Develop new walking routes](#) – Develop new coastal walks and urban trails to widen the product offer. Focus development on hubs;
- Increase the frequency and number of direct flights;
- Broaden and deepen market awareness of the Algarve as a cycling and walking destination;
- [Greater awareness of the health benefits](#) of activities requiring physical exercise;
- [Growth in market demand](#) for cycling and walking holidays;
- 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.

6.4. Threats

The threats below are external factors that 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 external factors that may threaten the destination.

7. Comparative Advantages and Gap Analysis

7.1. The Algarve's Comparative Advantages in Cycling and Walking Tourism

Destination

- Climate - good weather year round
- Location – proximity to Europe
- Destination security
- Friendly people
- Airport – facilitating direct access to region
- Outstanding natural environment – topography and landscapes, flora and fauna
- Variety of experience opportunity e.g. mountains to sea
- Cultural Heritage – modern and historic
- Food – high quality and competitively priced
- Established recreational activities
- Start/end of European trail network

Walking

- Rota Vicentina Association management model
- Long distance walking trail network variety and range

Cycling

- Good quality rural road network with low traffic volume
- Available mountain biking experiences

7.2. Key Gaps/Needs in the Future Development of the Algarve Cycling and Walking Tourism

Product

- Signage – trails and roads
- Incomplete off-road on certain trails
- Signposted urban trails
- Hubs - orientation points and local routes
- South coast trail network
- Standard approach to code of conduct for walkers and cyclist
- Standard approach to trail grading

Infrastructure/facilities/services

- Inadequate direct and off-peak flights
- Limited accommodation/services base in rural areas
- internal public transport network
- Reduction of airport charges

Markets/segments

- Lack of targeted marketing for cycling and walking
- Lack of awareness in market of walking/cycling product offer

Management and Organisation

- Lack of data for visitor monitoring
- Stakeholder coordination
- Information quality - website/maps on cycling and walking trails
- Capacity building for small businesses

Appendices

Appendix A – Policy Summary

Tourism Development International have reviewed the following key strategic plans:

- A1.1: TURISMO 2020 – Action Plan for Tourism Development in Portugal
- A1.2: PENT (National Strategic Plan for Tourism – Goals Revision 2013-2015)
- A1.3: Algarve Regional Spatial Plan (PROT Algarve - 2007)
- A1.4: Strategic Marketing Plan for the Algarve Tourism (2015-2018)
- A1.5: Southwest Alentejo and Vicentina Coast Natural Park Land Management Plan (POPNSACV-2011)
- A1.6: Ria Formosa Natural Park Land Management Plan (POP NRF-2009)

A1.1: TURISMO 2020 – Action Plan for Tourism Development in Portugal

Main Touristic Resources in the Algarve:

South Coast and Barrocal

- Beaches, cliffs and Marinas
- Diversity of Hotel Offer (Integrated Resorts / Residential Tourism)
- Health and Wellness Tourism and Nautical Tourism
- Entertainment activities (Water and Theme Park)

Costa Vicentina

- Natural Park of Sudoeste and Costa Vicentina
- Nautical Tourism
- Golf

Mountain

- Food and Wine (Algarve Gastronomy)
- Natural Areas of interest
- Nature Tourism and Health and Wellness Tourism
- Golf

Low Guadiana

- Salt marsh of Castro Marim and Vila Real de Santo António
- Nature Tourism

Indicators of tourist activity in Algarve – (2013)

- Hotel capacity: 107,500
- Overnight stays: 14.7 million
- Occupancy rate: 44.4%
- Revenues: € 609.0 million

- RevPar: € 32.7

VISION TOURISM 2020

Portugal wants to be the destination with the biggest tourist growth in Europe, supported on the sustainability and competitiveness of a diversified, authentic and innovative tourist offer, consolidating tourism as a core activity for the economic development of the country and its territorial cohesion.

Strategic Objectives

I. ATTRACT - Qualification and development of the area and its distinctive tourism resources

Priorities

1. Preservation and economic development of the historical and cultural heritage;
2. Urban regeneration of cities and of high tourist interest historic centers;
3. Stimulating sustainable tourism potential of the national network of protected areas and the rural heritage;
4. Coastal development and strengthening the interaction of the maritime economy and tourism;
5. Development of equipment and support services to tourism;
6. Improvement of networks and transport systems, promoting the sustainable mobility of tourist flows.

II. COMPETING - Strengthening the competitiveness and internationalization of tourism companies

Priorities

1. Upgrading and innovation of tourism enterprises;
2. Development of innovative economic activities in the areas of tourism activities, events and restaurants of interest for tourism;
3. Encouraging entrepreneurship in generating and developing new ideas and new tourist business;
4. Enhancing access of Tourism SMEs to ICT;
5. Improvement of strategic skills of SMEs;
6. Quality Certification and energy efficiency.

III. EMPOWER - Capacity building, Training and R & D + I in Tourism

Priorities

1. Enhancement of technical and vocational training in Tourism;
2. Improvement / modernization of infrastructure and training equipment, and internationalization of Hotel and Tourism Schools;

3. Qualification and training of entrepreneurs and managers of the tourism sector for innovation, management and business models;
4. Capacity building of public tourism administrations and technological modernization of services for agents operating in the tourism industry;
5. Development and transfer of scientific and technological knowledge for tourism businesses, promoting the economic value of R & D;
6. Availability of knowledge to public and private actors of the tourism industry.

IV. COMMUNICATE - promotion and marketing of the tourism offer of the country and its regions

Priorities

1. Strengthening the external tourism promotion of the country and regions: communication campaigns in key source markets, trade marketing activities and economic diplomacy initiatives;
2. Strengthening of digital marketing: web platforms, social networks, online channels, mobile, digital content;
3. Structuring and marketing of the tourism offer;
4. Capture and consolidation of air routes to Portugal, by increasing promotional activities at the point of origin;
5. Promotion and boosting domestic tourism;
6. Promotion of structural events that reflect the affirmation of national and distinctive attributes that drive the increase of flows and tourism revenues.

V. COOPERATE - Strengthening of international cooperation

Priorities

1. Strengthening crossborder cooperation relations - Portugal-Spain;
2. Development of cooperation relations in Europe;
3. Intensified presence of Portugal in processes and organizations for international cooperation.

A1.2: PENT (National Strategic Plan for Tourism – Goals Revision 2013-2015)

Algarve

The strategy includes efforts in growth markets, especially France, Poland and Russia, and the revitalization of the consolidated, with the loyalty of Portugal and the United Kingdom / Ireland and further boost for the most dynamic sectors of Netherlands and Germany.

Beyond the traditional sun and sea and golf, the Algarve should bet on five more products to mitigate seasonality and complete the offer.

At the product level, there are the following lines:

- In terms of product sun and sea, there is the need to develop accessibility in the middle season and new markets in the summer, enrich the experience, promote the upgrading of urban areas and bring the product to market.
- In golf, there is the need to promote the rehabilitation of the surrounding areas, develop content and making it available channels and bring the product to market.
- In the residential tourism, there is the need to launch specific mechanisms and instruments for the consolidation of the financial structure of enterprises, enhance the promotion and marketing of the Algarve as residential tourism destination and available on the Internet systematic and targeted information to the client, and support for placing the product on the market.
- In nature tourism, there is the need to develop content and making it available on channels, create diversity of experiences, walks on foot, by bicycle or on horseback, specialize the service / experience, and develop good sustainability practices throughout the value chain of the product birdwatching.
- In the nautical tourism, there is the need to raise awareness among foreign and borders service, and captaincies to continue and increase the focus on standardization and streamlining of procedures, promote the provision of marinas and leisure ports depending on mooring posts available, sensitize municipalities for quality and good access to beaches, disseminate international events and promote the provision of surfing.
- In business tourism, there is the need to develop infrastructure up to 3000 people and complementary equipment, develop specialized services and place the product on market.
- In health tourism, especially the medical tourism level, there is the need to develop and strengthen the structuring of integrated medical offers of services in tourist services and to promote their marketing.
- In aspects of wellness (spa and thalassotherapy), there is the need to develop content to made available on channels and densify the diversity of experiences made available to customers.
- In religious and cultural tours, there is the need to put the georeferenced resources in value, develop content and information to the client, and encourage and diversify experiences.
- Under the product food and wine, there is the need to densify activities, develop content and experience, in particular with the integration of local products in the operation of tourist units, and integrate the offer on promotion and marketing platforms.

A1.3: Algarve Regional Spatial Plan (PROT Algarve - 2007)

Strategic objectives:

I. To qualify and diversify the tourism / leisure cluster

The restructuring of the regional economic base, starting with the qualification and diversification of tourism and services by this induced, is a necessary condition for the development of the region. It is therefore necessary to ensure the competitiveness of the tourism / leisure, especially in the most attractive market segments; to diversify tourism in terms of markets and products, maintaining the attractiveness of the sun and the beach; promote the emergence of tourist segments with higher added value and an important sector of "leisure industries"; strengthen the quality of tourism services and complementary activities; and densify the relationships between different economic activities of the region.

II. Strengthen and qualify the economy, promote knowledge intensive activities

The qualification of human, organizational and business resources is a key vector for action in pursuit of this strategic objective. Strengthen and qualify the economy and promote knowledge intensive activities still mean, to the Algarve, to encourage the emergence of a solid core of advanced services to 'export' whether in complementary tourism areas - for example, health – or in business services for customers outside the region; develop new industrial activities based on technology and knowledge; achieve levels of excellence in teaching and research niches; and generalize the introduction of knowledge and creativity in the economic activities of the region. The industries related to recreational boating, renewable energies and sport can be an example of new sectors driven by tourism / leisure cluster.

III. To promote a balanced and competitive territorial model

In a tourist area, a balanced and competitive territorial model should, first of all, preserve competitiveness factors from that activity, recovering the quality of spaces and the landscape, preserving the natural heritage and removing the degradation factors - physical, economic and social – in certain areas. A balanced territorial model has to be geared towards the recovery of the value of the natural, cultural and landscape heritage and its role in management regarding future generations, for the rehabilitation of the coastline and removal of excessive pressures on it and the promotion of the potential exploitation of less developed areas of the interior. Promote balanced and competitive territorial model containing the urban pressure on the coast and increasing the potential for development of depressed areas of the

interior, ensuring territorial cohesion and the integrated use of the potentials of different territories, structure a strong urban system and well inserted between the European dynamics of innovation and competitiveness dimensions, qualify equipment and urban services and encourage the development of advanced and higher level urban functions, are essential objectives to be achieved.

IV. To consolidate a sustainable and durable environmental system

In the Algarve this heritage is of particular importance and has to be seen also as a support feature to its economic specialization. The competitiveness of the tourism / leisure cluster is dependent on the public space and landscape quality resilience and high levels of environmental protection and conservation of nature and cultural heritage. To consolidate a sustainable and durable environmental system, ensuring the structure and function of natural and semi-natural systems and their contribution to the development of socio-economic activities in the Algarve, to promote nature conservation and biodiversity, ensuring mutual coordination with the social activities -economic, regain the quality of public space and landscape and ensuring the availability of resources for development, are important objectives to be achieved.

Strategic options:

1. Environmental Sustainability, which translates protection concerns and enhancement of natural resources and biodiversity;
2. Territorial rebalancing, which are reflected territorial cohesion objectives and further development of disadvantaged areas within the region;
3. Urban Structuring, through which guides the urban system from the perspective of better links with the rural areas, strengthening territorial competitiveness and international projection of the Region;
4. Qualification and Diversification of Tourism, with the fundamental objective of improving the competitiveness and sustainability of tourism / leisure cluster, evolving to a higher quality offer and greater diversity of tourism products;
5. Protection and Enhancement of Cultural Heritage Historical and Archaeological, which is a recognition of the potential use of this territorial resource;
6. Structuring of Collective Equipment networks, which are structural elements of the territorial reorganization of the Region;
7. Structuring of Transport and Logistics Networks, a logic of competitiveness and territorial balance and greater integration into national and European spaces.

TOURISM SECTOR - Operative Goals

- Enhancing the image of the region, built on the tourist attractiveness as a key element to attract people with different profiles and from different geographical origins, through diversification, differentiation and qualification of tourism activities, increasing the attraction of motives and incorporating more value added in the offer;

- To diversify and differentiate tourism and leisure products, both to offset the demand on the coastline, such as stimulating the supply of products with higher added value and lower seasonality; provide the tourism ventures, equipment and appropriate complementary infrastructure, including support for nautical tourism infrastructure, pools and solariums, health and wellness tourism facilities, outdoor spaces, recreational facilities, etc., with suitable locations and articulated with the regional urban network;
- Establish guidelines on net growth in accommodation offer and its desired rate as well as on capacities of the territorial units, including the definition of suitable models for expansion of residential areas, both in major urban centers such as the reclassification of building areas dispersed;
- Adopt a policy of upgrading and repositioning the offer of classified and not rated tourist accommodation, set the framework, the integration and tourist qualification of tourism real estate and unclassified supply;
- Value spaces with tourist vocation oriented to promote excellence, to frame the Tourism Development Centers, under the amendment / revision of municipal master plans;
- Promote exclusively tourist offers of excellence in coastline areas with a carrying capacity for these uses, in line with environmental sustainability options;
- Explain the concept of Tourism Development Unit within the general framework of the "Structuring Investments" for the region and define rules for the licensing and implementation, introducing qualifying criteria of the offer, subject to the principles of sustainable development and social and territorial cohesion;
- Proceed to the regional setting of the national expansion policy for the golf market and the definition of supply growth parameters;
- Define strategic framework orientation, including territorial, economic and environmental, and public investment program for marinas, and for recovery of coastal resources with further attention, the valences of cruise tourism and sport fishing;
- Promote cultural activities and enhance cultural tourism, creating new products and attracting reasons to incorporate greater added value in regional tourism.

A1.4: STRATEGIC MARKETING PLAN FOR THE ALGARVE TOURISM (2015-2018)

Strategic vision for the Algarve tourism: 2015- 2018

Competitive tourist region, renowned for the quality of its offer and sustained growth:

- Sharp competitiveness by developing a culture of partnership that enables efficient management of resources, resulting in increased attractiveness and performance improvement.
- Enhancement of resources of the region in order to create value and national and international recognition as a quality tourist destination.
- Increase of tourist activity in the region being an inducer of social and economic progress, generating positive externalities that support sustained growth in the region.

Strategic guidelines

A. Consolidated products

1. *Sun and Sea*
2. *Golf*
3. *Residential tourism*

B. Complementary products

1. *Food and Wine*
2. *Touring*
3. *Health Tourism*

C. Products under development

1. *Business tourism*
2. *Nature Tourism*
3. *Nautical Tourism*

Despite representing a significant share in Europe, the Algarve is still in its design phase

Key success factors:

- diversity of natural resources and its sustainable management;
- Wide and varied range of routes and itineraries adapted to various types of tourists;
- Existence of parks and nature reserves;
- Existence of support services (e.g.: hire of equipment and materials, transport);
- Good accessibility;
- Cleaning and maintenance of the surrounding areas;
- Appropriate infrastructure hosting, signalling and basic equipment;
- Guides and monitors with ability in foreign languages;
- Accommodation integrated into the natural surroundings;
- Certification system of natural areas and companies.

Algarve situation:

- Vast natural resources: 1 nature reserve, 2 natural parks, Natura 2000 network, protected landscapes and natural monuments;
- Climate favourable to the practice of many outdoor activities (hiking, birdwatching, cycling and adventure sports);
- Complementary offer, representative of the authenticity and tranquillity associated with nature tourism;
- Wide biodiversity (fauna and flora), with specific elements of the region;
- Natural resources unprepared for the tourist fruition;
- Inadequacy of current regulations regarding nature conservation compatible with tourist activity;
- Poor monitoring of activities and nature tourism companies;
- Lack of skilled human resources.

Proposal for segmentation of tourism products for target markets

		MARKETS																
		German	Spain	Netherl	Ireland	Portugal	United	Belgium	Denmar	France	Sweden	Switzerl	Austria	Canada	Finland	Norway	Poland	Russia
PRODUCTS	Sun and Sea	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Golf	✓		✓	✓	✓	✓		✓		✓				✓	✓		
	Meeting Industry	✓		✓	✓	✓	✓	✓		✓								
	Health	✓	✓	✓	✓		✓	✓	✓		✓	✓	✓	✓	✓	✓		
	Nautical	✓	✓	✓	✓		✓		✓		✓				✓	✓		
	Residential	✓		✓		✓	✓			✓	✓							✓
	Touring	✓	✓	✓			✓		✓		✓	✓	✓	✓	✓	✓	✓	
	Nature	✓	✓	✓			✓	✓		✓								
	Food and Wine	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓					✓
	Sport	✓					✓		✓		✓	✓	✓		✓	✓		
	Motor caravaning	✓	✓	✓		✓	✓	✓	✓	✓	✓				✓	✓		
	Accessible / Senior	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		

- ✓ Priority markets
- ✓ Betting markets
- ✓ Markets to be monitored

Action plans

A. Articulation between industry players

1. Creation of cooperation networks and working groups for each product.

B. Development of a regional culture supporting tourism

1. Targeted awareness campaign for residents
2. Education for agents of the tourism sector in the region
3. Awareness actions with the student population

C. Marketing Intelligence

1. Monitoring mechanisms of tourist activity.
2. Studies in the tourism area
3. Academic research in tourism
4. Discussion forums
5. Destination sustainability monitoring

D. Air accessibility

1. Direct links to major airports

E. Qualification of services and human resources

1. Certification
2. Specialized technical training
3. Promotion of careers in tourism

F. Promotion

1. Redefinition of the communication strategy
2. Digital marketing;
3. Trading Platform

G. Offer enrichment

1. Visit Valuation
2. Entertainment
3. Enhancement of resources / products – Tasks regarding Nature Tourism:
 - a. Organize an annual event of international renown, for disclosure, testing and marketing of this product;
 - b. Raise awareness on management bodies of natural spaces to the need to entitle conditions for the development of service competencies, and conducting groups;

- c. Identify by-products with potential for immediate structuring;
- d. Create quality label for companies that provide services within the by-product Birdwatching;
- e. Develop content and communication media;
- f. Develop / maintain informative and guiding signage to drive tourists along the various paths and routes;
- g. Develop a management model, monitor and promote in an integrated manner the existing routes and those to be created.

A1.5: SOUTHWEST ALENTEJO AND VICENTINA COAST NATURAL PARK LAND MANAGEMENT PLAN (POPNSACV-2011)

The PNSACV is located on the southwest coast of mainland Portugal, assembled in the regions of Alentejo and Algarve, developing from the Ribeira da Junqueira, north of Porto Covo in the municipality of Sines, to the municipality of Vila do Bispo, next to Burgau, still covering the territory of the municipalities of Odemira and Aljezur.

Tourist developments

In the PNSACV area only the following types are allowed: a) Hotel establishments (4 star guesthouses and hotels or more); b) rural tourism projects; c) camping and caravan parks; d) tourism ventures in rural areas (rural hotel); e) tourism ventures in rural areas (villas and agritourism ventures). It is only allowed to build new tourist developments outside the coastal zone and Type II additional protected areas.

Specific intervention areas for the conservation of nature and biodiversity correspond to areas to carry out enhancement, protection, recovery, rehabilitation or retraining interventions, with the objective of increasing or restoring their ecological value:

- Carrapateira Cliffs (Aljezur);
- Lagoons and temporary ponds;
- Sagres area (Vila do Bispo);
- Vila Rosalinda (Aljezur), Acomave and Esparregueiras (Vila do Bispo).

Specific intervention areas for the promotion of cultural heritage have the following objectives: a) safeguarding, preservation, alteration, reconstruction, recovery, research and integration of cultural heritage values, environmental education and the promotion of local development; b) recover authentic character cultural of buildings or other structures for its traditional vocation for nature tourism; c)

environmental education actions and dissemination, promotion and enhancement of the cultural heritage values.

Specific intervention area of historical and archaeological nature aims to promote historical and archaeological heritage, ensuring the conditions of access and visit compatible with the preservation of cultural and natural values. In the specific area of intervention of historical and archaeological nature enhancement of existing assets, information activities using signs or other information media should be carried out:

- In the municipality of Aljezur: the Ponta do Castelo, the Ribat of Arrifana, the Fortress of Arrifana, the Bronze Age Necropolis of Vale da Telha, the underwater archaeological site of Nau "La Condessa" in Carrapateira, the Forte of Carrapateira, the Historical Center of Carrapateira, the Historical Centre of Bordeira and Historical Center of Aljezur;
- In Vila do Bispo municipality: Sagres fortress, the Belixe fortress, the Cape St. Vincent fortress, the Monte dos Amantes, the menhirs of Padrao/ Milrei, the Zavial Fort, the Fort of de Nossa Senhora da Guia da Baleeira, the Luz Fortress, the Vila do Bispo Historical Center, the Figueira Historical Center, the archaeological site of Vale do Boi, Boca do Rio, the islets of Martinhal and the Ocean Ship.

The **Charter of Nature Sport** defines the locations and other conditions for the practice of nature sports activities, periods and the maximum number of practitioners also may define other forms of nature tourism activities allowed in areas of partial protection type II and additional protected areas.

In the area of PNSACV, interventions on the coastline are governed by POOC (the Coastal Zone Management Plan). Scuba diving, surfing, body boarding, windsurfing and similar activities as well as sports, recreational and cultural activities is allowed, except for total protection areas.

Actions and activities to promote

Onshore area:

- The enhancement of the landscape, including restoration measures of degraded areas;
- The conservation, enhancement and dissemination of geological heritage;
- The preservation and reconstruction of the architectural and archaeological heritage;
- Information and training actions that promote knowledge and dissemination of natural and sociocultural values;
- Setting up of handicraft activity and the production of local products;

- The disclosure, signalling and management of interpretive paths or others associated with recreational, sporting, cultural or educational activities;
- Support for environmental education, dissemination and recognition of natural and cultural heritage values and the enjoyment of local values, like landscape, cuisine and handicrafts.

Marine area and inland waterway:

- Conservation of marine and inland waterway biodiversity;
- The promotion of nature tourism in the perspective of development and on the conservation of resources;
- Protection, safeguarding, enjoyment and enhancement of cultural landscapes and historic cultural heritage - underwater archaeology
- The promotion of best practices in traditional economic activities (local fishing with selective gear);
- Information, awareness and environmental education.

A1.6: RIA FORMOSA NATURAL PARK LAND MANAGEMENT PLAN (POP NRF – 2009)

The PNRF applies to the area covering part of the municipalities of Loulé, Faro, Olhão, Tavira and Vila Real de Santo António.

Specific objectives:

- a) Promote the conservation and recovery of terrestrial and aquatic habitats and species of indigenous flora and fauna, particularly the natural values of community interest;
- b) Recover and restore the habitats of waterfowl population and maintain or restore the favourable conservation status of globally threatened plant species;
- c) Prevent the degradation of sensitive geological and geomorphological systems;
- d) Repair the processes that can lead to degradation of the natural and landscape values involved, creating conditions for their maintenance and enhancement;
- e) Promote the planning of the different activities carried out in the water plan and adjacent areas, in particular the proper exploitation of fisheries resources in order to ensure their sustainability and the minimization of impacts on biodiversity;
- f) To ensure the safeguarding and enhancement of the archaeological (terrestrial and underwater), cultural, architectural, historical and traditional heritage in the region, as a complement to the conservation of nature and biodiversity;
- g) Encourage the recovery of traditional products from PNRF;
- h) Promote and disseminate nature tourism;
- i) Promote environmental education, dissemination and recognition of natural and socio-cultural values, contributing to the recognition of the value of the PNRF and raising awareness about the need for their protection, especially the economic and social agents and populations residents in the region;
- j) To promote scientific research and knowledge of present ecosystems, as well as monitoring natural habitats and populations of flora and fauna species, contributing to adaptive management based heavily on technical and scientific knowledge;
- k) To ensure the active participation of all public and private entities, working closely with local residents in order to achieve the objectives of protecting and promoting the natural, scenic and cultural values of the PNRF.

Actions and activities to promote:

- a) The conservation of the most important natural habitats in the PNRF, especially the Community interest listed in specific legislation, such as salt meadows, Halophyte woods, salt steppes and dunes and temporary ponds;

- b) Conservation of the most important flora and fauna values in the PNRF, especially species of Community interest listed in specific legislation and other endemic or endangered species;
- c) The control of not indigenous invasive plant species;
- d) Recovery actions of degraded forest areas, particularly those where there are exceptional botanical values;
- e) Landscape Rehabilitation, particularly of spaces occupied by forest stands singly;
- f) Valuation of geological heritage and landscape as socio-economic development factors;
- g) Conservation and maintenance of salt pans;
- h) The conversion of forestry practices to extensive multiple use forest with native species;
- i) Sustainable exploitation of fisheries resources;
- j) Regulation of traditional exploitations of the Natural Park of Ria Formosa, establishing guidelines or orientations for its maintenance, to protect, safeguarding, enjoyment and enhancement of cultural landscapes and historical and archaeological cultural heritage as a development factor, recognizing its value as element of originality, differentiation and identity and memory statement;
- k) Regulation of facilities and activities that may have negative impacts, ordering its implementation and operation and conditioning them to comply with the impact minimization measures;
- l) Active management of forest stands, which enhances its multiple use and the reduction of fire risk, through preventive actions and measures consistent with the conservation of natural values;
- m) Farming through appropriate practices to soil exploitation and of which does not lead the degradation of natural values involved, particularly through the dissemination of integrated production methods and organic farming, and by providing information concerning good agricultural practice;
- n) The promotion of traditional products of regional base and tourist activities that respect and promote the natural values of the region;
- o) Nature tourism that enhance the correct enjoyment of the natural values of the PNRF and promote sustainable development of the region;
- p) Environmental education and the dissemination of knowledge of natural and socio-cultural values, seeking greater understanding and public support for the management and promotion of the classification status of the PNRF;
- q) Disclosure, signalling and management of interpretive paths or others associated with recreational, sporting, cultural or educational activities, aimed at recognizing the natural values and the enjoyment of ambiances and local equipment;
- r) The development of scientific studies, in particular the characterization and monitoring of biological values, and coastal sediment dynamics, and the creation of conditions for receiving and work of technicians and researchers;

- s) The recovery and development of cultural heritage, particularly of the most important archaeological and architectural elements, harmonizing its use with the objectives of nature conservation and biodiversity.

Nature tourism is the most appropriate tourist typology for Protected Areas, developing in various ways of lodging, complementary activities and services for environmental animation, allowing to contemplate and enjoy the natural, architectural, landscape and cultural heritage, considering the supply of an integrated and diversified tourism product.

The PNRF allows the following types of nature tourism ventures:

- a) rural tourism ventures;
- b) tourism ventures in rural areas;
- c) camping and caravan parks.

APPENDIX B

B1 - Stakeholders Consulted

Tourism Development International undertook a series of face to face consultations during September and October 2015.

Organisation	Contact Name
ANA Aeroportos de Portugal	Francisco V. Pita Helder D. Lemos
Turismo de Portugal	Dr. Luis Matoso Teresa Ferreira Carla Margarida Simões
Turismo do Algarve	João Fernandes Duarte Padinha
Algarve Tourism Association	Dora Coelho Ana Vargues
Faro Municipal Authority	João Correia Vargues Paulo Santos
Association of Hotels and Tourist Enterprises of Algarve (AHETA)	Elidérico Viegas
Association of Hotelier Industrial and Similar of Algarve (AIHSA)	Daniel do Adro
AMAL - Associação de Municípios do Algarve	Jorge Coelho
Almargem-Associação de Defesa do Património Cultural e Ambiental do Algarve	Anabela Santos
Rota Vicentina Association	Marta Cabral
Odiana	Joana Germano
Federação Portuguesa de Ciclismo	Sandro D. Araújo Marco Fernandes

Organisation	Contact Name
Algarve Regional Coordination and Development Commission (CCDR-Alg)	António Ramos
ARA (Associação das Empresas de Rent-a-car do Algarve)	Armando Santana
ARAC (Associação dos Industriais de Aluguer de Automóveis sem Condutor)	Honorio Teixeira
MEGASPORT (Portuguese Federation of Cycle Tourism and Bicycle Users rep)	Fernando Canteiro Cristina Dias
Swift Momentum Sports	Tomas Swift Metcalfe
Walkin' Sagres	Carla Cabrita
Proactive tour	João Ministro
Live Love Ride	Pedro Rocha
Hotel Vila Gale Lagos	Sofia Ribeiro
University of Algarve	Maria Joao Custorio

B2 – Local Trade Survey Participants

1. Alameda Hostel
2. Hotel São Sebastião de Boliqueime
3. PRIORITYPARADISE - AGÊNCIA DE TURISMO LDA
4. Casa Modesta
5. Descansa Pernas
6. Girafa Sábia
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 Setobra
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 Fóia
27. Casa Bamboo
28. S. José Algarve Hostel
29. Casa Azul
30. Duas Quintas
31. EXUBERGALÁXIA, 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

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 Capitão Mor
56. Quinta do Mel
57. Rotas Ancestrais
58. Turitravel
59. Alvor Travel - Agência de Viagens
60. Portugal 4U
61. Monte João Roupeiro
62. Bartholomeu Guest House
63. Parque de Campismo de Albufeira
64. Apartamentos Turísticos Oasis Village
65. Táxis Pinheiro & Delmira, Lda
66. Monte da Xara
67. My Choice Algarve
68. White Sun Hostel
69. ALUGUERMOTO - ALUGUER DE VELOCÍPEDES, 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 Atlântico
78. Hostel Victória
79. Formosamar, Lda - Formosamar
80. Apartamentos Turísticos Pine Cliffs Residence
81. Apartamentos Atalaia
82. Transgharb
83. Aldeamento Turístico Four Seasons Fairways
84. Casa Azul
85. Hotel Magnólia
86. Valente & Carvalho - Fun Bike Shop
87. Branquinho da Silva
88. Transfar - Agência de Viagens e Turismo, Unipessoal, Lda.
89. Parque Rural da Quinta de Odelouca
90. The Mountain Bike Adventure

B2 – International Trade Survey Participants

1. Merlot Reiser	Norway
2. Topo-Aktief	Netherlands
3. HilltopTreks	Ireland
4. Cycle Classic Tours	Netherlands
5. Grand Angle	France
6. Temaresor	Sweden
7. ReiseSpass	Germany
8. Merlot Tours	Denmark
9. Aarts Wandelreizen	Netherlands
10. One Foot Abroad	Ireland
11. Wikinger Reisen	Germany
12. Headwater Holidays	UK
13. Easy Rider Tours	USA
14. J Barter Travel Group	Ireland
15. Solo Walks	Denmark
16. S-cape Travel	Spain
17. Breakaway Adventures	USA
18. Adventure Holidays	Ireland
19. Garda Mountaineering Club	Ireland
20. Slane Striders	Ireland

APPENDIX C

Photographic Overview

Section 1: Rota Vicentina

Image 1: View north to Alentejo from near Odeceixe on the Rota Vicentina – Fisherman’s Way



Image 2: Rota Vicentina directional signage

Image 3: Rota Vicentina, local route bridge infrastructure, good quality construction



Image 4: Cliff top boardwalk at Carrapateira (16: Trail of Tides and part of the Fisherman's Way)



Image 5: Boardwalk at Carrapateira (wheelchair accessible, high quality)



Image 6: Views south on the Fisherman's Way



Image 7: Well-constructed boardwalk infrastructure

Image 8: Rota Vicentina orientation signage at Cape St Vincent (good quality)



Section 2: Ecovia do Litoral

Image 9: Poor quality Ecovia signage at Cape St Vincent, with Rota Vicentina and Via Algarviana signage nearby



Image 10 & 11: Rusting Ecovia signage at Cape St Vincent



Image 12: Ecovia signage at Faro

Image 13: Faded blue line denoting path of Ecovia, much has disappeared rendering the concept obsolete



Image 14: High quality off-road section of the Ecovia between Tavira and Vila Real do Santo Antonio



Image 15: Ecovia orientation signage, expensive to maintain



Image 16 & 17: High quality off-road section of the Ecovia between Tavira and Vila Real do Santo Antonio – shows what the trail could/should be like all the way



Image 18: Attractive waterfront & route of Ecovia at Vila Real de Santo Antonio



Image 19: Ecovia signage at Vila Real de Santo Antonio



Image 20: Ecovia signage at Vila Real de Santo Antonio



Section 3: Guadiana Corridor

Image 21: Grande Rota do Guadiana signage at Odeleite

Image 22: Signage for PR4 at Odeleite – very good quality signage



Image 23: View from PR1 above Laranjeiras over Rio Guadiana



Image 24: PR1 signage at Larenjerias

Image 25: Grande Rota do Guadiana (GR15) signage



Image 25: PR1 stated as suitable for mountain-bikes, surface would indicate intermediate+ riders only



Image 26: View towards Alcoutim from Grande Rota do Guadiana, showing attractive river valley



Section 4: Via Algarviana

Image 27: Via Algarviana directional signage at Alcoutim



Image 28: Via Algarviana orientation signage at Alcoutim, might be better located near the tourism information office with directional signage leading from it.



Image 29: Via Algarviana directional signage at Casas Baixas, alongside In Loco orientation signage



Image 30: Via Algarviana directional signage at Casas Baixas



Image 31: Via Algarviana directional signage at Casas Baixas, alongside In Loco directional signage



Image 32: Tia Bia at Barranco Velho, 9 bed overnight accommodation for Via Algarviana with very good quality food



Image 33: Broken Via Algarviana (GR13) and local route (PR4MCQ) signage at Monchique



Image 34: Sun faded Via Algarviana signage at Monchique – should be removed/replaced



Image 35: Via Algarviana directional signage near Monchique



Image 36: Via Algarviana local route directional signage that has been vandalised with black spray paint



Image 37: Via Algarviana directional signage near Monchique, very effective

Image 38: Via Algarviana directional signage, new, good quality and effective



Image 39: Via Algarviana directional signage near Monchique

Image 40: New Via Algarviana directional signage near Monchique, very effective and more resistant to vandalism



Image 41: View over Monchique



Section 5: Local Routes – Inland

Image 42: Rocha de Pena interpretative signage, good quality (trail maintained by Loule Municipal Council who have good reputation for trail development, trail also 72: Rocha de Pena Trail)



Image 43: View up Rocha de Pena escarpment

Image 44: Rocha de Pena pathway



Image 45: Expansive view from top of Rocha de Pena towards the coast with sea views



Image 46: View from top of Rocha de Pena with views over inland countryside



Image 47: In Loco orientation signage at Feiteira



Image 48: Poor quality In Loco directional signage near Casas Baixes



Image 49: Entrance to Fonte Ferrea – recreational facility with opportunities for bird-watching – great potential yet not included on 36 walks in the Turismo do Portugal guide



Image 50: Café facility and good quality orientation signage at Fonte Ferrea



Image 51: Bird-watching signage near Fonte Ferrea



Image 52: Text heavy orientation panel for local route at Monchique



Image 53: Good quality orientation signage for local walking route at Barranco Velho



Section 6: Local Routes - South Coast

Image 55: Attractive centre of Vila Real de Santo Antonio – potential for historic walking trail



Image 56: Off road cycling route alongside N125 near Villa Real de Santo Antonio



Image 57: Local route orientation signage near Monto Gordo – 160: Aldeia Nova Interpretation Trail



Image 58 & 59: Local cycling and walking route trail and signage near Monto Gordo



Image 60: Cyclists on local route near Monto Gordo



Image 61: Lake on local cycling and walking route near Monto Gordo with opportunities for bird-watching including bird hide



Image 62 & 63 & 65: Boardwalk connection to beach on Aldeia Nova route near Monto Gordo





Image 66: Attractive centre of Tavira – potential for historic town walking trail



Image 67: Unattractive entrance to Rio Formosa Natural Park Headquarters and Interpretation Centre, operated by INCF, near Olhao. Current system of arrival, speaking to security guard, paying €2 and then gaining entrance to car park is confusing for visitors. Would be more effective if visitors were to pay for parking on exit with clearer signage to explain this.



Image 68: Poor quality signage at Rio Formosa NP that should be removed on 50: Nature Discovery Trail of the Marim Environmental Education Centre



Image 69: Poor quality directional signage at Marim Environmental Education Centre



Image 70: Poor quality trail surface at Marim Environmental Education Centre that would be more attractive as a boardwalk



Image 71: Poor quality, ineffective directional signage at Marim Environmental Education Centre that urgently needs replacing



Image 72: Poor quality interpretive signage at Marim Environmental Education Centre – huge potential but needs investment



Image 73: Café at Marim Environmental Education Centre – not used effectively with machines for coffee and snacks but with huge potential (50-60,000 visitors p.a. currently) and outdoor space



Image 74: Underused exhibition space at Marim Environmental Education Centre



Image 75: Restored mediaeval tidal watermill at Marim Environmental Education Centre – very attractive environment and enables visitors proximity to open sea views



Image 76: View over Rio Formosa Natural Park from Hotel Eva restaurant, Faro indicating connection between Faro and the wetlands



Image 77 and 78: Boardwalk walkway around Ilha da Culatra, with Peter Mac Nulty surveying



Image 79: Town walls at Faro, significant opportunity for historical town walking route – this view shows previous investment in pathways that has now deteriorated.



Image 80: Attractive new cycle path at Parque Ribeirinho de Faro with local cafes that would benefit from increased visitors



Image 81: Attractive new cycle path at Parque Ribeirinho de Faro showing proximity to wetlands and airport in the distance



Image 82: Parque Ribeirinho de Faro indicating total investment of €1,367,695 with Turismo do Portugal contribution of €836,261



Image 83: Trail surface at Parque Ribeirinho de Faro that has deteriorated due to over-spraying from irrigation system



Image 85, 86, 87, 88, 89 – these images indicate the existing pathway around the perimeter of Faro Airport, which with upgrading of the trail standard, would provide a connection between the city centre of Faro (marina) via Parque Ribeirinho de Faro to Faro Beach (Praia do Faro) – this could be easily cycled in 15-20 minutes providing visitor access to the beach.





Image 90: View of salt pans along the route which would provide opportunities for visitor interpretation related to the salt production process.



Image 91: Single-lane causeway bridge connection to Praia do Faro with no cycle lane – in need of upgrading



Image 93 & 94: Praia de Faro with very attractive fishermen's cottages





Image 95: Boardwalk at Alvor (27: At the Whim of the Tides and also PR2PTM Complementary Path on the Via Algarviana – which would appear to be too disconnected from the Via Algarviana to be a linked trail)

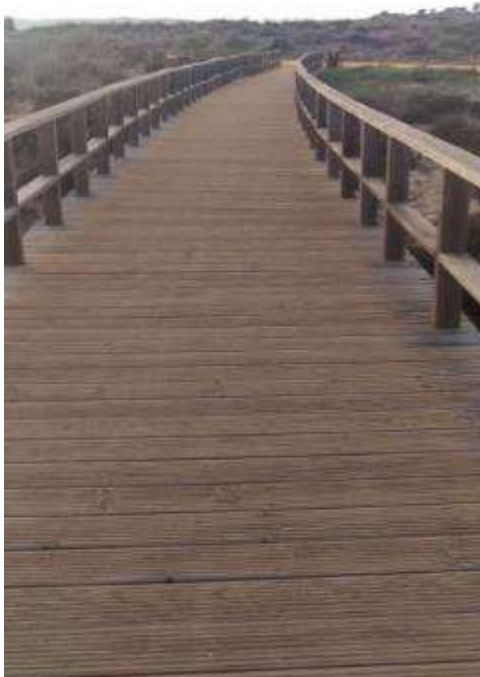


Image 96 & 97: Local walking route at Alvor with beach connection



Image 98: Trail surface at Alvor showing damaged trail surface that makes it difficult for cyclists and buggies to walk the route – route would also benefit from some interpretive signage



Image 99: Orientation signage at Alvor indicating this is a local route of the Via Algarviana – this could be considered too far from the route of the Via Algarviana to be considered a loop route off this long distance trail – TDI would question the appropriateness of this initiative.



Image 100: Bridge at Lagos showing best-practice segregation of road and cycle/pedestrian traffic. This could be replicated at Praia do Faro, see image 91



Image 101: Cycle route at Lagos showing road with no cycle path – dangerous interaction of cycles and cars was observed – this needs a segregated cycle route to be considered part of the Ecovia route



Image 102: If visitors ask for a walking route at Lagos they are mostly directed towards Praia do Pinhao, an hour return walk which has significant potential and is highly attractive. This image shows the unattractive start to the walk.



Image 103-105: Cliff top pathway between Lagos centre and Praia do Pinhao – this heavily eroded pathway has collapsed and a fence has been put in place. This is clearly dangerous and small

children could easily walk through and fall down a 30m drop to rocks below. This should be rectified immediately.



Image 106 & 107: Highly eroded pathway leading down to Praia do Pinhao. Impossible for wheelchair access and lack of appropriate surfacing leads to ongoing erosion given significant visitor use



Image 108 & 109: Praia do Pinhao is an attractive beach which many people want to access





Image 109-111: Wooden staircase at the western end of the beach – heavily used and unsafe





Image 112: This image shows one of the main supports for this staircase which is not fixed due to erosion. It is only a matter of time until collapse and potential visitor injury or death.



Image 113: Severe trail erosion west of Praia do Pinhao



Image 114: Damaged steps at Praia do Pinhao



Image 115-117: Coastal walk from Saleme to Sagres, no walks in this area were included in the Turismo do Portugal walking guide despite having significant international comparative potential

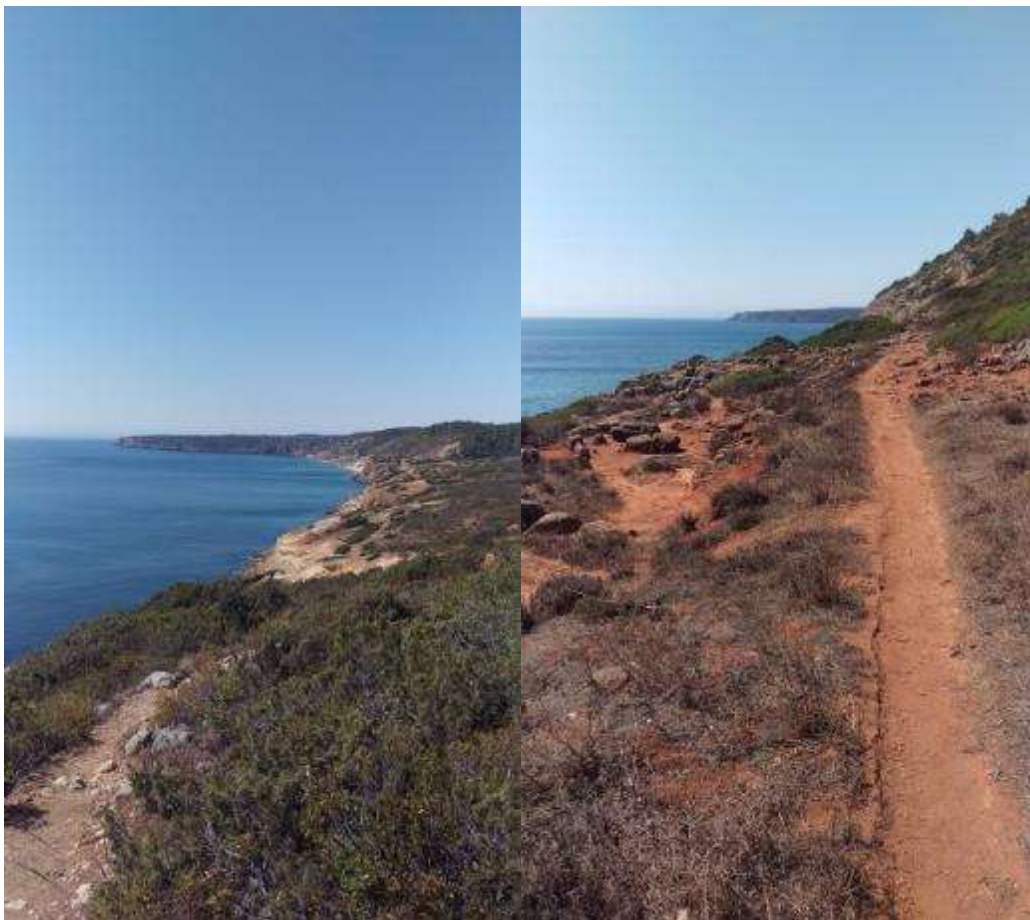


Image 118: One section of the walk near Salema would require intervention in the form of a short boardwalk around one dangerous section with a drop to enable the walk to be used safely by all user groups – this would not be expensive to do



Image 119: High quality visitor stairway connecting car park to beach at Salema that is made of recycled plastic & therefore resistant to erosion. This example could be replicated at Praia do Faro.



Image 120: View from Sagres Fort to Cape St Vincent – clifftop off-road greenway would provide a significant attraction



Image 121: View from Cape St Vincent – the most south-westerly point in Europe. This view also shows the part of the lighthouse buildings which are still occupied by staff and which should be converted to a café/visitor centre as this area offers the most spectacular views.



APPENDIX D

Hotels and Activity Providers Website Audit

A. Hotels Website Audit

1. Bikotels in Algarve

Name/Website	Walking	Cycling	Social Media	Notes
Aldeia da Pedralva (Vila do Bispo) http://www.aldeiadapedralva.com/hotel-overview.html	Special page regarding trekking and hiking in Portuguese version only. Rental of hiking equipment, guided tours, (prices included) map of trails	Special page regarding their mountain biking centre in Portuguese version only, including types of bikes to rent, and map of trails network	Links to Facebook, Twitter, Youtube. They are not very active on these social media sites	Cycling and walking only mentioned as part of a list of activities available in the area in the English/Spanish and German versions of the site
Hotel Made Inn (Portimão) http://www.madeinn.com.pt	Walking mentioned as part of activities in area	Bike Rental Available	Twitter Facebook and LinkedIn. Moderate participation in social media – not cycling/walking related	Basic website
Hotel Zodíaco (Quarteira) http://www.hotel-zodiaco.com	Not mentioned	Membership of Bikotel on Homepage and special page for Bikotel Service: Outdoor bike parking; - Bike secured garage; - Laundry service; - Bike washing facility; - Cyclist menu (carbo, fruit and	No links to Social Media	Basic website

Name/Website	Walking	Cycling	Social Media	Notes
		veggy); - Mini-Bike repair station with basic tool set and pump; - Bike routes for road or mountain biking with maps, technical data and GPS tracks.		
Cabanas Park (Tavira/Cabanas) http://www.algarveresorts.net/Cabanas-Park-Resort.php	Mentioned on the Portuguese version as part of the 'Nature Tourism' page.	Membership of Bikotel on Homepage	Facebook, YouTube, Twitter for the Group of Hotels	The English version is for the group of hotel – Bike Package for another hotel of the group
Golden Club Cabanas (Tavira/Cabanas) http://www.goldenclube.pt/	Walking in the Ria Formosa Park highlighted	Bike rental available Cycling in Ria Formosa Park and 2 options from the Park to either Tavira or the Port	Twitter and Facebook. Regular posts about activities at the Club – not walking or cycling related	Website badly laid out
Hotel Aqua Pedra dos Bicos www.aquapedradosbicos.com/offer/cycle-tourism-in-the-algarve-please-contact-us-for-offer-dates	Walking not mentioned	Cycle Tourism in the Algarve Featured at the bottom of Homepage. Offered in partnership with Megasport. No details on cycling offer on Website - just a link to Megasport	Facebook – not very active since May	Basic information

2. Other Accommodation in Algarve

Name/Website	Walking	Cycling	Social Media	Notes
Estalagem Aeromar (Faro) http://www.aeromar.net/pt	Walking not mentioned	Bike Rental	Small presence on Facebook	Nice page on Ria Formosa
Hotel Memmo Baleeira (Sagres) http://www.memmohotels.com/baleeira/pt/mountain-bike-road-racing-cycling-touring-cycling.html	Webpage on Trekking incl Link to http://www.atalaia-walking.com/en/ and http://www.rotavicentina.com/ as well as video	Webpage on cycling partnership with Megasport to offer cycling holidays – webpage include direct links to actual 7 nights packages / Bike Hire (Incl Price) Details from Megasport re cycling holidays available for download	Facebook, Google +, Youtube, Instagram	Wide array of information for walkers/cyclists.
Vale d’El Rei (Lagoa/Carvoeiro) http://valedelrei.com/atividades-e-lazer	Walking not mentioned	Partnership with Megasport but no details, just general link to Megasport website	Facebook	Basic Website
Velamar (Albufeira/Olhos de Água) www.velamar.pt/atividades-e-lazer	Walking not mentioned	Partnership with Megasport but no details, just general link to Megasport website	Facebook	Basic Website (Same as Vale d’El Rei)
Magnólia (Almancil/Quinta do Lago) www.hotelmagnolia.pt/atividades-e-lazer	Small section on Walking – Ria Formosa.	Partnership with Megasport but no details, just general link to Megasport website	Facebook	Basic Website (Same as Vale d’El Rei)

Name/Website	Walking	Cycling	Social Media	Notes
Vicentina Aparthotel (Aljezur) www.vicentina-aparthotel.com/algarve-winter-cycling.html	Walking listed as part of activities available in the area (also mentioned in the text of the Homepage of the Portuguese version but not the English Version)	Cycling listed as part of activities available in the area In the Portuguese version, bike rental and a page 'Algarve Winter Cycling' are listed in small font at the very bottom of the Home Page. The bike rental link takes the reader to the Megasport website, and the Algarve Winter Cycling page relates to the partnership with Megasport	Facebook	Basic Website – not user friendly
Pedras d'el Rei (Tavira/Santa Luzia) http://pedrasdelrei.com/pagina/destaques/cycling/	Walking link featured on the Homepage Good information regarding the pricing and details of the walking package available to download – but the download link is very small and does not say what is included in the download	Algarve Winter Cycling featured on the Homepage (Megasport) Good information regarding the pricing and details of the cycling package available to download – but the download link is very small and does not say what is included in the download	Facebook, Limited Twitter	Poor Website design
Pedras da Rainha (Tavira/Cabanas) http://pedrasdarainha.com/pagina/destaques/cycling/	Walking not mentioned	Algarve Winter Cycling featured on the Homepage (Megasport) Good information regarding the pricing and details of the cycling package available to download – but the download link is very small	Facebook. Twitter account set-up but no tweets.	Same Website as Pedras d'el Rei

Name/Website	Walking	Cycling	Social Media	Notes
		and does not say what is included in the download		
Hotel São Sebastião (Boliquiteime) www.hotelboliquiteime.com/algarve_winter.php	Walking featured as part of activities available in area. Maps available at reception. Link to www.activityalgarve.com	Mountain biking featured as part of activities available in area. Link to www.activityalgarve.com Also full webpage on Algarve Winter Cycling Programme available in partnership with Megaspport.	Facebook, MySpace, Hi5, YouTube, Wordpress, Flickr. Present but not very active	Nice website
Hotel Faro (Faro) http://www.hotelfaro.pt/	Walking briefly mentioned as part of the Ria Formosa page	Walking briefly mentioned as part of the Ria Formosa page	Busy on social media Facebook, Flickr, Twitter, Google+, YouTube.	Business Hotel feeling from website
MGE Hotels (Albufeira) http://www.mgehotels.com/mge-hotels-algarve Hotel Baía Atlântico	Walking not mentioned	Cycling not mentioned	Quite active on Facebook	Basic website for each hotel in the group
Hotel Eva (Faro) http://www.tdhotels.com/pt/Menu/Hoteis/Portugal/Algarve/Hotel-Eva/O-Hotel.aspx	Walking not mentioned	Cycling not mentioned	Facebook, Google+	Not geared towards activities
Hotel Colina dos Mouros (Silves) http://www.colinahotels.com/newsite/#!/page_Mourospt	Walking not mentioned	Cycling not mentioned	Not listed on website	Very basic website

Name/Website	Walking	Cycling	Social Media	Notes
Villa Termal das Caldas de Monchique (Monchique) http://www.monchiquetermas.com/hotel-overview.html	Brief mention of walking on home page as part of activities in the area	Brief mention of mountain biking on home page as part of activities in the area	Busy on social media Facebook, Twitter, YouTube	Spa Hotel – not geared towards activities
Val d'Oliveiras (Lagoa/Carvoeiro) http://www.valedoliveirasresort.com	Walking not mentioned	Cycling not mentioned	YouTube, quite busy on Facebook	Nice website but not geared towards activities
Real Marina (Olhão) http://realmarina.realhotelsgroup.com	Brief mention of walking as activity available in area	Cycling not mentioned	Facebook, Google+, Pinterest (HoteisReal)	Not geared towards activities
Ozadi Tavira (Tavira) http://www.ozaditavirahotel.com/hotel-algarve	Trekking mentioned as outdoor activity that can be booked through hotel. Webpage on 'Running friendly hotel' Partnership with Run4Excellence Lack of information on what the training camp actually involves	Cycling not mentioned	Facebook, Google+, Pinterest, YouTube	Sub-list of webpages hard to see.
Martinhal (Sagres) http://www.martinhal.com/pt/	Vast programme of walking tours organised by Hotel	In partnership with Algarve Cycling Holidays but Martinhal have dedicated brochure.	Busy on social media: Facebook, Twitter, Google+, Pinterest	Hotel has a huge programme of activities for guests.

Name/Website	Walking	Cycling	Social Media	Notes
		Martinhal Bike Station provides guided & self-guided cycling weeks. Details can be downloaded.		
Alte Hotel (Alte) http://www.altehotel.com/	“Active Tourism” section from homepage highlighting the cycling and walking opportunities of the Via Algarviana	“Active Tourism” section from homepage highlighting the cycling and walking opportunities of the Via Algarviana	Not listed on website	Basic website
Hotel Apolo (V.R de Stº António) http://www.apolo-hotel.com/index.php	Activities page lists ‘Cycling, jogging or just walking on the Eco-route’ as potential activities in the area	Activities page lists ‘Cycling, jogging or just walking on the Eco-route’ as potential activities in the area	Facebook	Special webpage on special programme for Athletes.
Herdade da Corte (Tavira) http://www.herdadedacorte.com	Page on Hiking link to Via Algarviana, Suggested itineraries	Page on Ecovia/Cycling Link to Ecovia website.	Facebook and Twitter	Great base for activity holidays

3. Hotel Companies

Name/Website	Walking	Cycling	Social Media	Notes
Grupo Vila Galé http://www.vilagale.com	Walking listed as one of many activities in the area	Cycling listed as one of many activities in the area	Facebook, Twitter YouTube	Basic Website
Hotéis Tivoli http://www.tivolihotels.com/pt/ofertas-especiais/ofertas-especiais/ver-campanhas-especiais/descobrir-o-algarve-a-pedalar-1.aspx?Action=1&PID=296122	Walking not mentioned	Special Offer: Cycle Tourism Offered in partnership with Megasport. No details on cycling offer on Website - just a link to Megasport	Facebook, Twitter, YouTube, Instagram	English version for Cycling Tourism not working
Hotéis Baía Algarve http://www.baiaalgarve.com/algarve-winter-cycling.html	Walking not mentioned	Algarve Winter Cycling page on website in partnership with Megasport. Some information on website about possible areas for cycling.	Facebook, Twitter, YouTube, Instagram, Google +	Basic Website
Luna Hotels & Resorts http://www.lunahoteis.com/en/Luna-Hotels-Resorts/Cycling-Algarve.aspx	Walking not mentioned	Special Page on Algarve Winter Cycling – In partnership with Megasport.	Facebook, Twitter, YouTube	Could not find the Cycling page from the Homepage
Algarve Resorts www.algarveresorts.net/en/promocao.php?id=41	Walking not mentioned	Bike Friendly package in partnership with Megasport	Facebook, Twitter	Validity of package January to March 2015- 2016 not available

B. Activity Providers Website Audit

Company / Website	Type of Walking Services (Guided/ Duration)	Description of Walking Itineraries/ Areas Covered/ Pricing	Cycling Related Services (Guided/ Duration)	Description of Cycling Itineraries/ Areas Covered/ Pricing	Social Media Presence	Notes
LUXURY on TWO WHEELS www.biketoursportugal.com/en	-	-	5 guided tours in Portugal – 1 dedicated to the Algarve 1 including the Algarve. 3 self guided tours – 1 including Algarve 4 Single day tours – 3 in the Algarve	Full details of Itineraries available. Full pricing information and what is included	Facebook, Instagram	Full booking facilities available online Luxury accommodation Excellent website, easy to navigate and full of information
CAMINHOS DA NATUREZA www.portugalnaturetrails.com	9 Hiking tours – (5 available guided) 5 in the Algarve 2 of which are available guided. Day tours available but no details provided	Full details of Itineraries available. Full pricing information and what is included	10 self guided Cycling tours - 3 including the Algarve available guided Road Bike and Mountain Bike also available Day tours available but no details provided	Full details of Itineraries available. Full pricing information and what is included	Facebook, Twitter, Instagram	Booking via booking form Website full of information, but not easily navigable
TURAVENTUR www.portugalbestcycling.com/ http://www.turaventur.com/index.php?muda_idioma=-en	4 multi day walking tours and 3 one day tours (not in Algarve)	Full description available and prices Booking form	4 multi Day bike tours, including 1 in Algarve (self guided and guided) + 3 day guided tours (not in Algarve)	Full description available and prices Booking form	Facebook	Canoeing/jeep tours and multi adventure tourism arts and crafts available

Company / Website	Type of Walking Services (Guided/ Duration)	Description of Walking Itineraries/ Areas Covered/ Pricing	Cycling Related Services (Guided/ Duration)	Description of Cycling Itineraries/ Areas Covered/ Pricing	Social Media Presence	Notes
BTTour http://pt.portugalbike.com	-	-	14 Hybrid, Road and Mountain Bike tours, 4 including the Algarve All tours available guided, self guided and supported. Day bike tours available but not in the Algarve	Full details of Itineraries available. Full pricing information and what is included	Facebook, Instagram, YouTube, LinkedIn, Pinterest, Google+	Booking online available
A2Z ADVENTURES http://a2z-adventures.com/en/	Large range of trips throughout the world. 2 locations in the Algarve (day trails)	A lot of information on the area	Large range of trips throughout the world. 3 locations in the Algarve (1 multi day, 2 day trails)	Full itinerary available for the multi day trip including prices. A lot of information on the area	Facebook, Google+, Pinterest, Twitter	Booking forms online Newsletters available for walking/trekking, road biking and mountain biking
Live Love Ride http://portugalbiketours.com/	-	-	Bike tours throughout Portugal – 2 in the Algarve	Full details of Itineraries available. Full pricing information and what is included	Facebook, Instagram, Twitter, YouTube, Pinterest, Strava	Booking forms online Good website
Lisabikes www.lisabikes.com/	-	-	Algarve tours (some guided, some self guided): - Centre Based x3 - Trans Algarve x3	Full details of Itineraries available. Full pricing information and what is included	Facebook, Twitter, Google+ Pinterest	Booking forms online Very good website – full of information on the Algarve and tours provided.

Company / Website	Type of Walking Services (Guided/ Duration)	Description of Walking Itineraries/ Areas Covered/ Pricing	Cycling Related Services (Guided/ Duration)	Description of Cycling Itineraries/ Areas Covered/ Pricing	Social Media Presence	Notes
			<ul style="list-style-type: none"> - Racing Cycling x3 - Day tours Bike Rental			
MEGASPORT www.megasport.pt/uk/default.asp?flag=55	-	-	<ul style="list-style-type: none"> - Commerce of bicycles, sport material and accessories - Classes to learn how to ride a bicycle or just to improve it, including jumps techniques - Rent a Bike - Technical assistance - Baggage transfer service - Guided Bike Tours 	Full details of Itineraries available via blog. Full pricing information and what is included in the blog.	Facebook	Booking forms for bike hire online but not for tours. The blog which contains information regarding the tours is poorly presented: hard to find the information, not intuitive.
Tomas Swift Metcalfe www.swiftmomentumsports.com	-	-	Algarve based <ul style="list-style-type: none"> - Training - Bike rental - Holidays (Road cycling and mountain bikes) 	Quite a lot of information, but detailed itineraries only available by contacting the company	Facebook, Twitter, LinkedIn, Pinterest	Big emphasis on cycling training
MTBIKES Algarve www.mtbalgarve.com/	-	-	Mountain bike holidays and hire around Faro Bike Rental	Limited information Pricing included	Facebook, YouTube, Twitter	Basic information and website
Freeflow http://www.freeflow-cycling.pt	8 day self guided Vicentine Coast	Full details of Itineraries available.	Choice of 4 cycling tours (3 of which including the	Full details of Itineraries available.	Facebook	Full online booking facility.

Company / Website	Type of Walking Services (Guided/ Duration)	Description of Walking Itineraries/ Areas Covered/ Pricing	Cycling Related Services (Guided/ Duration)	Description of Cycling Itineraries/ Areas Covered/ Pricing	Social Media Presence	Notes
		Full pricing information and what is included	Algarve) available as self guided or guided.	Full pricing information and what is included		Easy to navigate website, well presented
JPTO Bike in Portugal http://bikeinportugal.pt/	-	-	10 cycle tours in Portugal (Incl Azores) – 1 including the Algarve	Full details of Itineraries available. Full pricing information and what is included	Facebook, Instagram	Full online booking facility. Easy to navigate website, well presented
ALGARCROSS www.algarcross.com/	Walking available - Via Algaviana - Rota do Minerio - Rota do Contrabando	Little information given	Bike Rental Mountain bike tours in Rota do Minerio	Little information given	None listed	The English version does not work. Large range of activities on offer Very basic website
Algarve Cycling Holydays http://www.algarve-cycling-holidays.com/	-	-	2 x Mountain biking packages and 1 x road cycling Choice of 2 hotels Day tours/bike hire available from the Bike Station at the Martinhal Hotel	Full details of Itineraries available. Full pricing information and what is included	Facebook	Newsletter available Excellent website, easily navigable, full of information Booking forms available Non cycling activities available
Alternativtour www.alternativtour.com	Half day trips in Adventure Park Foia/ Monchique	Full pricing available	Half day trips in Adventure Park Foia/ Monchique Bike rental	Full pricing available	Facebook	Based in Adventure Park Fóia Large range of outdoor activities Multi activity packages available

Company / Website	Type of Walking Services (Guided/ Duration)	Description of Walking Itineraries/ Areas Covered/ Pricing	Cycling Related Services (Guided/ Duration)	Description of Cycling Itineraries/ Areas Covered/ Pricing	Social Media Presence	Notes
Outdoor - Tours http://www.outdoor-tours.com/	Day/half day tours and 1 centre base walking tour available	Information available on guesthouse/base location but routes are not described Day/half day walks well described Pricing available	Day/half day tours and 1 centre base cycling tour available	Information available on guesthouse/base location but routes are not described Day/half day cycles well described Pricing available	Facebook, Google +, LinkedIn, Twitter	Website could be better organised. Canoeing/kayaking also available.
Tours & Tracks http://www.toursandtracksalgarve.com/pt/	6 day guided walking tours Long distance self guided routes: - Rota Vicentina - the Fisherman's Trail - Via Algarviana	Full details of Itineraries available. Full pricing information and what is included	7 day/half day guided mountain biking tours Long distance self guided routes: - Rota Vicentina - the Fisherman's Trail - Via Algarviana 1 day guided cycling tour 3 long distance cycling tours	Full details of Itineraries available. Full pricing information and what is included	Not listed	Large range of activities on offer Booking and enquiries via email
Vicentina Travel http://www.vicentinatavel.com/	6 self guided walking tours in the Algarve	Full details of Itineraries available. Full pricing information and what is included	3 self guided cycling tours in the Algarve + tailor made	Full details of Itineraries available. Full pricing information and what is included	Facebook	Easy to navigate website

Company / Website	Type of Walking Services (Guided/ Duration)	Description of Walking Itineraries/ Areas Covered/ Pricing	Cycling Related Services (Guided/ Duration)	Description of Cycling Itineraries/ Areas Covered/ Pricing	Social Media Presence	Notes
Janela D'Aventura http://www.activityalgarve.com/	Details of walking tours: re-directed to Tours and Tracks website Centre based walking holiday Long distance walking holiday Half day guided walking tours	Full details of Itineraries available. Full pricing information and what is included	Details of cycling tours: re-directed to algarvebikelihoodays.com Wide range of long distance / half day / tailor made holidays (touring bike/mountain bike/Road bike/E bike)	Full details of Itineraries available. Full pricing information and what is included	Facebook, Twitter, Google +, YouTube	No online booking facility A lot of information on the Algarve via algarvebikelihoodays.com
Valente & Carvalho - Fun Bike Shop http://www.algarvelo.com/	-	-	Guided 5 day road biking trip	Full pricing information and what is included Limited information on itinerary	Limited presence on Facebook, Twitter, Google+, Pinterest	Limited amount of information
Mountain Bike Adventure http://themountainbikeadventure.com/	-	-	Mountain biking day/half day trips and holidays	Itineraries available	Instagram, Facebook, Twitter, YouTube	Website hard to navigate Mixed activity packages available
Staller Bike http://www.stallerbike.de	-	-	Bike Station in Robinson Club Quinta da Ria, Tavira.	Limited amount of information on tours No pricing found	None listed	English version not available Basic information

Company / Website	Type of Walking Services (Guided/ Duration)	Description of Walking Itineraries/ Areas Covered/ Pricing	Cycling Related Services (Guided/ Duration)	Description of Cycling Itineraries/ Areas Covered/ Pricing	Social Media Presence	Notes
			Includes mountain biking and cycling day/half day tours			
Branquinho da Silva http://www.abilibike.com/	-	-	Bike Rental	Maps of mountain bike tracks and road tracks on website. Tours page empty	Facebook, Instagram, Twitter	Limited information
Fun River http://www.fun-river.com	3 routes featured	Little information provided	Bike Rental 1 route featured	Little information provided	Facebook	Wide range of activities, but very little information on each Very poor website
Lands www.lands.pt	Half day guided walk in Ria Formosa	Excellent amount of information on the walk	-	-	None listed	Also on offer: kayak and sailing Booking form available
Etnogarbe www.etnogarbe.com/	Very limited amount of information	Very limited amount of information	-	-	Facebook, Google+, YouTube, Instagram	Non Portuguese pages on Trails not available
Walking Sagres www.walkinsagres.com/walkin_i.html	4 half day tours	Good information on tours including pricing	-	-	None listed	Nice simple website
Proactive Tour www.proactivetur.pt/en/index.php	Activity programme not found on website	-	-	-	Twitter, Facebook, Blogspot	Consultancy on Ecotourism, Environmental Management and Rural Development

Company / Website	Type of Walking Services (Guided/ Duration)	Description of Walking Itineraries/ Areas Covered/ Pricing	Cycling Related Services (Guided/ Duration)	Description of Cycling Itineraries/ Areas Covered/ Pricing	Social Media Presence	Notes
SAL www.sal.pt	Day/Half day tours (Not sure if Algarve is included)	Itineraries and pricing included	-	-	Facebook	Very poor website Translation using Google Translate only
Portugal Walk Hike www.portugalwalkhike.com	Day/half day walks Tailor made walks available	Excellent amount of information and pricing Location of trails could be better described.	-	-	Facebook	Booking via booking form Excellent amount of information
Portugal 4U www.portugal4U.pt	Guided – easy/medium difficulty	No information on the tours available	-	-	Facebook, Twitter, Pinterest, Vimeo, Instagram, LinkedIn	Nature / cultural activities
Passeios Ria Formosa http://www.passeios-ria-formosa.com/pt	West Coast day tour	Pricing and itinerary available			Facebook, Twitter, YouTube, Google+	Offer mostly water-based activities Booking form available