Guidelines on how to increase attractiveness for rail tourism

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UIC

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Content

Forewords

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TopRail is much-needed initiative: the European Tourism Association (ETOA) is grateful to have the opportunity to partner with UIC to support its development. Europe is the world's most mature tourism destination: if we can make travel sustainable here, we will have gone a long way to ensure that one of the best value-adding industries can thrive.

As well as new products and other innovations along ever-changing distribution chains and in destination, better tourism will require better use of capacity. In large part, this is a management problem. But it is also a commercial problem since it requires the seats to be sold. For rail, any empty seats when the train moves off represent lost revenue.

At time of writing, the economic and social implications of the Covid-19 pandemic dominate our thoughts. The focus for the travel and tourism industry is on survival, but also on recovery. We are all reminded that inter-connectivity is one of the most precious part of society. Like much else, it is easily taken for granted.

From visa-free borders to sophisticated infrastructure, freedom to travel is highly prized. Never more so than when it is under threat. Railways transformed Europe in the 19th century, putting distant cities within range of a wide population; as others write in this volume, railways and tourism grew up together.

It is time for us to rekindle that relationship, and to make leisure rail work better for our clients and business partners, and for society. There are commercial, practical and technical challenges to solve, but the will and the expertise is there: it is up to us to make it happen.

Carles Casas Esplugas, Toprail Chairman
FGC Strategic Planning Director

Rail has had an undeniable attractiveness since it started developing as a business. Of course, the development of railways was linked to the industrial revolution, the development of logistics and the need of mass production, mass transport and fast communications of both goods and people. But besides this cold and business-oriented approach, it also developed an aura that remains until today. At TopRail and the UIC we are convinced of the potential of railways, not only to feed our nostalgia and memories of a glorious past but as a business opportunity servicing the tourists of the XXIst century.

It is with this aim that we are proud to present this second set of guidelines devoted to Tourism and Rail. In 2017 the "TopRail Guidelines on Sustainable Tourism" were issued, highlighting the potential of rail in terms of the development of sustainable products for tourists. Today, just a few months after, sustainability is more than ever at the centre of all activities and is an aspect particularly relevant when choices are made when satisfying "non-essential" needs as leisure travel.

But to be sustainable, Rail Tourism needs to attract customers and to do so it must increase its attractiveness in a highly competitive environment. The potential is not enough, actions must be taken in order for rail-based products to meet the needs of a continuously evolving customer.

This is a daily challenge that all the members of TopRail share and that is why we decided to develop this set of Guidelines devoted on how to increase of attractiveness of rail products from the tourist point of view.

This set of guidelines is the result of more than a year of hard work, both from the expert in charge of develop them and the UIC but also of contributions and reviews from all the members. The challenge was huge as we aimed to cover the broad scope of rail and tourism. A big effort has been made to produce not only a document but a tool that can be of practical use for all the agents involved in tourism and rail.

I am very happy that we are finally able to share the result of this effort. This second set of guidelines are just part of the work we carry on at TopRail and could not have been possible with the contribution of its members.

I am sure that the reader, despite its side of the business, will find some insights, views and information directly linked to its daily activities. If this link leads to practical action and an increase of the attractiveness of a rail product somewhere in the world, then the guidelines would be filling its purpose.

Let me finish by inviting you to share with TopRail your views, your comments and your considerations regarding this document or the Rail and Tourism sector. Undoubtedly, we need to keep developing links between the different stakeholders and collaborate in the creation of more competitive rail products and attracting more tourists to rail. I would be glad to welcome you at a TopRail Forum event and establish first-hand fruitful discussions.

1. Introduction

Railway tourism can be considered in general terms either a mode of transportation tourists use to reach a tourist destination[1] or else a tourist product in itself.[2]

Actually, in recent years, there is a growing trend aiming towards enhancement of travel experiences including nostalgia and a sense of history as well as added-value services on and off-board trains. This has resulted in a new batch of railway journeys being marketed as tourism products in themselves.[3]

Railways and tourism have been close allies since early times. The relationship dates back to the mid nineteenth century, when both flourishing industries boosted each other's growth. George Pullman's creation of the first "hotel on wheels" in 1867 is a clear example of this mutually beneficial link that spread across the world. In the last decade of the nineteenth and early years of twentieth centuries, an investment fever caused railways to pop up all around the world. As a rule, where rail tracks were laid, hotels, international trade and tourism surely followed.

By the middle decades of the twentieth century, though, rail had gradually been losing its position as a leading mode of transport compared to road and airline. Novelty, convenience and speed -amongst other reasons- displaced railways as preferred mode of transportation. As the age of mass tourism dawned, right after the Second World War, the number of both, general purpose and tourist, rail passengers continued to dwindle steadily everywhere.

Currently, railways are no longer considered the main mode of transportation for tourist purposes. For instance, and according to United Nations World Tourism Organization's figures, about barely 2% of all international tourist journeys use railways as mode of transportation.[4]

In Europe, according to a survey carried out by the European Commission Directorate for Mobility and Transport in 2018, while 80% of the population use railways frequently or occasionally, 78% never use the train for an international trip. 26% use it for regional and/or national trips at least a few times a year, while 62% use railways for a regional or national trip once a year or less. Among the most usually cited motives for taking railway journeys, 35% cite "*other leisure activities*" and 23% "*going on vacations*" as main reasons for travelling by train.[5]

Generally speaking, and according to the research cited, overall satisfaction with rail travel in Europe reaches 2.5 out of 3 points, with passengers from Austria, Ireland and Portugal expressing the highest satisfaction, and passengers from Romania and Bulgaria expressing the lowest satisfaction about railway transport among the EU countries taking part in the survey.

Although this is an encouraging result for the potential of rail travel in Europe, it is important to note that the items evaluated in the survey are strictly related to use of trains as means of transportation regardless of motive. Satisfaction with railway station, with railways travel and with accessibility to stations are among the items surveyed. Other items are more subjective, like cleanliness and state of repair, comfort, safety and security, etc.

To make rail travel more attractive for tourism purposes will require for companies to pay attention to other details that are important for the tourism experience beyond basic cleanliness and maintenance, or timely information about delays.

Increased environmental concerns, changes in policies (deregulation and open competence in Europe) a surge of well publicized investments in high speed lines across the world, an accelerated growth in luxury travel demand that seeks new different experiences for the wealthy, changes in consumption and travelling amongst younger generations (less millennials own cars and have driving licenses) and environmental concerns are signaling a slow but steady prospect for resurgence in rail travel.

Around the world, the luxury and cruise train rides segment has seen an important growth in passengers, creation of new products and large investments in upgrading of existing rolling stock for tourist purposes in various parts of the world.

Companies are investing in more comfortable cars and seats, electric or USB sockets for personal electronics, on board Wi-Fi connection, better baggage storage space, renewed menus and upgraded dining cars, improving on board amenities and creating services that are more customer- oriented.

Recent announcement by the Austrian Railway Company, ÖBB of increased frequencies and routes of the Nightjet sleeper trains has created a new wave of interest across European companies, willing to re-evaluate rail connections for short and medium distances.

Some hurdles though remain such as like hefty track access fees, infrastructure capacity constraints and high maintenance costs, amongst others, that are keeping night trains and train travel in a wider sense from regaining preponderance at the desirable speed.

On the other hand, international tourism is growing at a 7% rate but[6] only 2% of international tourist arrivals use the railways as mode of transportation. This means that there is plenty of room for growth for this until now quite untapped market.

It is the purpose of these guidelines to help railway operators to better understand the key elements and actions that can help rail companies increase numbers of passengers and income through tourism by giving some existing examples and proposing different actions to be developed.

2. Definitions: Rail Tourism and Rail Tourist Demand

For the purpose of these Guidelines, we will be considering as **Rail Tourism** all tourism trips that include the use of railways as the main means of transportation, or as the secondary means of transportation within the destination during a tourist trip, or use a railway-based tourist product or attraction within a tourist trip.

Rail Tourism Demand on the other hand, will be characterized as:

General Rail Tourism Demand, visitors both domestic and international using **railways as the means of transportation -main or secondary- during their tourism trips**. General Rail Tourists, GRT, share services and infrastructure with regular passengers.

Railway companies aware of the increased presence of foreign or domestic, non-commuter passengers on particular services or lines, seasonally, or otherwise, may use these guidelines to actively offer a better experience for this particular segment within their general clientele.

Specifically, Rail-oriented Tourism Demand is comprised of visitors both domestic and international using **railway-associated assets, resources, attractions, activities and products during their tourism trips for a recreational, leisure trip**.

Railway companies catering for, or aiming to cater to, Specifically Rail-oriented tourists, may follow these guidelines to create profitable and attractive tourist products to satisfy the specifically rail-oriented tourist demand. These "*products*" will make use of different railway-based assets in different stages of the tourist product or experience, in order to increase railway-based attractiveness. These will be identified in these guidelines as specifically rail-oriented tourist products -or SROTP.

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3. Trends in travel and tourism and opportunities for rail tourism

Tourism is booming. It is estimated that about 1.4 billion inbound trips were taken in 2018. As with every other aspect of consumer led markets the travel and tourism industry is experiencing deep changes brought about by technological, socio-economic and demographic factors.[7] These dynamics go beyond short-term fashions and are rather disrupting industries and bringing about a whole world of opportunities for railways and rail tourism.

3.1. Technology and hyper-connectivity are creating a demand for more personal time, wellness and controlled disconnection

The **luxury travel** market is growing faster than ever in the recent years. In 2016 it was estimated that it amounted to €1 trillion, with an average annual growth of 4%. It is expected that it will grow at a 7.9% rate from 2019 to 2026[8]. Over a six-year period (2010-2016), High Net Worth Individuals (those with liquid assets valued over USD 1Million) grew in number by 52%, while their worth grew at a 42%.[9]

Forecasts state that luxury travel is poised to a faster rate of growth (6,2%) than general travel (4,8%) These trends of course are driving the growth of investment in the tourist industry and across all segments; upgrades in existing infrastructure and investments in new luxury assets are happening along the world, in hospitality, cruising and also railways, with upgrades, renovations and brand new luxury trains popping up across the world, as has already been mentioned.

At the same time, there is a growing need for disconnection, for personal time, for a sense of purpose, self-direction and self-enrichment; a "connected-disconnection" that allows for personal growth, a shift from conspicuous consumption into self-actualization. The raise of hyper-connectivity, access to information and personalization have led to an experience-driven world. According to Expedia, up to 70% of American consumers prefer experiences over possessions.

The travel and tourism industry's reaction to this new trend shows the rise of "**experiential travel**", "**travel with purpose**", "**transformational travel**" as well as renewed interest in **wellness**. What all these trends have in common is that they focus on the individual, creating opportunities for travelers to connect with the world in a manner that is meaningful and allows for a shift of perspective, a more personal and deeper experience that is as distant as possible from hyper connected, fast- paced, data driven lives.

Transformational experiences, brought about by self-actualization, finding meaning and authentic human connections are the key expectations of the new luxury in hospitality, travel and tourism.

Opportunities for Rail Tourism

Rail tourism is not isolated from this trend. There is a surge, as shown before, in investments in luxury "**cruise trains**" around the world, while other companies are investing in upgrading existing rolling stock to accommodate the requirements of the high-end market.

Usually these rail tourism companies offer itineraries along well-established tourist destinations that that combine scenic landscapes with the nostalgia of the slower pace of life of the early 20th century. The itineraries usually focus on unique activities, outstanding food, carefully designed interiors, personalized service, including on-board spas, all oriented towards creating space and opportunity for guests to self-actualize, recharge and enjoy authentic human experiences and connections while enjoying the slower way of travelling.

3.2. Lifestyles have been changed by technology: social, shared lives and blurred lines between work and leisure

The increase in mobile workers, and the growth of the gig economy is blurring the lines of personal and work persona. Up to 70% of business trips last year have included a leisure extension, giving birth to what is now known as "**bleisure**"[10], the mix of business and leisure travel.

Sharing economy is another force driving change and reshaping business models, travel work and lifestyles. This new lifestyle needs connectivity and outreach, open areas where informal networks and communities flourish, allowing nomadic workers to be part of actual and or virtual communities that also become their marketplaces in which skills as contractors are rented as frequently as tools, space or assets.

This of course affects the way people work and travel. The focus of this new class of work travelers is not the high-end accommodation, but rather the value of connections and networking opportunities allowed by the place they choose to live and work in.

Many high-end hospitality brands have already transformed their assets to cater to this trend of "social accommodation" Accor, with "Jo and Joe", or Hilton with "Motto" are amongst the traditional hospitality brands shifting into this market.

Generator, Freehand and Selina on their part are new players entering the field by developing this concept of "community high end" accommodation, by reinventing the concept of hostel, now rebranded as "poshtel"[11]. Following the co working model set up by We Work, these companies are creating places in which the focus is in the social added value, including co-working spaces that allow interaction, connection and experiences around socializing, food and drink, combining work and vacation.

Travelling for work or leisure, this type of traveler also looks for connections and experiences that are instagrammable, allowing them to improve their digital social standing. Their reliance on connection and social media is key in their choices.

3.2.1. Opportunities for Rail Tourism

Rail travel is social whilst air travel is individual. In this day and age this quality represents an enormous advantage for rail travel because of its potential for great social interaction and storytelling.

Creating social work areas with excellent and affordable Wi-Fi connection on board, or co-working lounge areas in railway stations can help lure this traveler and create communities of like- minded business travelers that give visibility to railways and rail infrastructure as social travel and working spaces.

Rail companies can cater to bleisure travelers with same-day rail-tours to renowned tourist destinations directly or through specialist commercial partners as well, since these travelers are more prone to including short leisure extensions to their tourist trips.

In order to make themselves more attractive it is key that rail companies upgrade their social media standing, encouraging and giving visibility to user generated content (UGC) as a tool to create peer to peer validation of rail travel. It is important to remember that youth travel amounts to 280 billion dollars yearly, so options that cater directly to this segment of young professionals have a wide potential audience so long as they are properly channeled.

Turkey's Eastern Express "Dogu Express" from Ankara to Kars has recently become an international Instagram sensation due to a trend by travelers to decorate their compartment in the sleeper car as if it were their bedroom at home and post pictures to the social network.

3.3. New Technologies, Data and Machine learning

The rise of **information technology** has been one of the major drivers in boosting travel around the world, enabling connectivity and personalization and also contributing to an unprecedented growth in the travel and tourism markets.

Tourism being mostly a demand-driven activity, the possibilities and challenges posed by the penetration of technologies in day to day life has made possible changes in the travel industry that were unheard of in the last decades. The advent of the smartphone unleashed a wave of personalization, immediacy and data management that was only imagined in the last decades of the twentieth century.

It is not a coincidence that standardization of access to air travel booking is credited with the unstoppable boom of international tourism in the last three decades. What began as improvements of inventory databases ended allowing the spread of **online booking systems** everywhere that in turn displaced the brick and mortar network of main street travel agencies and changed the tourism distribution channel forever.

On-line travel agencies, booking systems and electronic commerce platforms allowed travel and tourism companies to manage inventories more efficiently, enriching experiences for travellers by facilitating smart up-selling of ancillary products and services while at the same time increasing companies' bottom line as well as outreach.

Technologies such as **virtual reality and augmented reality** are also being introduced in order to make tourist experiences more rewarding or attractive. From virtual assistants or receptionists to virtual recreation of historical landscapes or archaeological remains, new technologies are adding to the tourist experience across the different services, providing room for personal enjoyment and growth by liberating staff from mechanical tasks, making those clerical tasks more time efficient for the client, and offering a vast array of information and experiences that enhance the whole satisfaction.

3.3.1. Opportunities for Rail Tourism

There is a big potential on innovation and new technologies (5G, AI, AR, IoT, wearables) in maximizing the added value of the touristic services and the passenger's experiences and they will create new opportunities and services for rail-related tourism.

On board entertainment, information and depth of experience, from virtual assistants to tourist or historical, themed information available to personal devices or individual seat screens will very easily allow to convert a regular rail coach into a tourist friendly one.

Artificial Intelligence applications are ready to provide solutions to implement like boosting revenues by sending offers to customers who have mentioned an intent to travel, understanding customer feedback and sentiment in detail or identifying potential PR issues early on.

Ferrocarrils de la Generalitat the Catalunya railway have carried a campaign based on augmented reality in the Monserrat rack railway with the objective to attract families and young people as targets of proximity market.

As stated in the European Community of Railways' Policy Agenda 2019-2024, European Railways agree that that better rail services, more digitalized ticketing systems and innovative marketing solutions will have to target the tourism market with great determination in the near future.

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For a long time, railways have remained fragmented, disconnected non- standardized systems, and that has been a major obstacle in the growth of rail travel in general and rail tourism in particular. Digitalization of supply and inventories still has a long way to go, and up to 70% of ticketing is still done offline.[12]

Technology for integrating and facilitating access to rail itineraries and fares would allow a more efficient management of a fragmented industry, fostering access to simplified booking and payment options, vertical and horizontal integration, connections, upselling and cross-selling that will make rail travel and tourism more convenient and attractive for mass consumer markets, as it did for airlines. The MoU recently signed between IATA (International Air Transport Association) and UIC; (Union International des Chemins de Fer) signs railways interest in moving towards more efficient ticketing systems that allow for intermodality and connectivity in order to make access more convenient to end users

Rail companies are moving quickly towards integrating itineraries, companies, classes and rates along the customer journey in order to make rail travel more easily available both to tourist companies and direct clients.

The work within the UIC Passenger Service Group, especially regarding the opening to third parties of the Merits Data Base, Trainline's acquisition of Captain Train (now being present in 24 different countries integrating over 137 suppliers), Voyages SNCF acquisition of Loco 2 or Expedia's acquisition of Silver Rail are clear signs that the time has come for rail travel to be integrated, accessible and available for tourists and tourism industry partners.

Mainstream online availability of rail travel will push the visibility and attractiveness of rail as a mode of transportation at the moment when the client is considering a tourist trip.

3.4. Socio Demographic trends

Socio demographic trends are creating an unstoppable rise of young, urban populations combined with migration and ageing that are **reshaping consumer markets** and purchasing decisions around the world. While the rate of growth in developed economies is expected to slow down to half the rate before the financial crisis, the global economy will still double in size by 2030, with new key players entering the field and creating new opportunities as well as competitors.

For the travel and tourism industry this means increased numbers of potential clients as larger swathes of population in developing countries climb out of poverty and into middle class. An increase in South-to-South travels is already happening, which means new markets open for investments.

3.4.1. Opportunities for Rail Tourism

Investments in high speed lines are becoming a fashionable trend in new markets. China, for instance is aiming for 38000 km of high-speed lines by 2025, and other countries are following in this frenzy.

This presents a unique opportunity for rail tourism to capture new markets from air transport to railways in undeveloped rail markets. Increased awareness of upgraded services will help the rail industry in general and rail tourism in particular to gain visibility as an option for the travel and tourism industry in non-traditional, untapped tourist markets.

Long haul travelers represent an excellent opportunity for cruise trains, or for integrated, multi-destination, cross- border escorted or self-organized rail trips.

Long haul tourists tend to consider the region they are visiting as a whole, regardless of political boundaries. As the European travel Commission research "Tracking multi destination travel in Europe's long-haul source markets: US, China, Japan and India"[13] highlights, Eurail Pass users take advantage of the wide coverage of 28 countries to make their way across Central and Western Europe visiting well-established tourist destinations across Europe. The research tracks behavior of long haul tourists across Europe, making the case for cross border cooperation as an effective way of attracting long haul tourists.

3.5. Environmental and Ethical concerns reshaping consumption

As a response to escalating environmental risks, consumer awareness has translated into **more ethical and resource-efficient lifestyles** which are driving the decision-making of younger generations in all spheres of life, travel included.

Also, trend-driven behaviors spread across the world thanks to social media. Consumption patterns, "dos and don'ts" gain traction at a higher speed than ever. Bans of single use plastics, including plastic straws, for instance, are expanding very quickly, while youth protests against fossil fuels are fueling more environmentally concerned behaviours at all levels. All this will surely mean that travel and tourism will experience the backlash unless measures are taken.

Conscious consumption is replacing conspicuous consumption, as experiences and personal achievements become more important than ownership for consumers in developed economies. Speed, convenience and personalization enhanced by instant access and sound ethics have become the markers of the new informed and self-aware consumer.

On the other hand, the ethical traveler has been slowly on the rise for some decades. Ecotourism, sustainable tourism, responsible tourism, have been more than buzzwords in the industry for some years now, with the first "Agenda 21 for the travel and tourism industry: towards environmentally sustainable development" dating back to 1992.

Consumers value products and destinations that minimize environmental impact and that take into account social and economic benefits for the local communities. Companies are increasingly required to prove their value to local communities, the environment and the destination, beyond flashy or meaningless certifications. The "slow" movement, from food to travel, highlights the new appreciation for a different lifestyle that extends towards consumption.

The move towards a more environmentally sound world that lowers dependence on fossil fuels is becoming a mainstream policy issue, more so after the European Commission presented their European Green Deal proposal, an ambitious package of measures that aim at enabling a sustainable green transition in Europe.

3.5.1. Opportunities for Rail Tourism

Travel and tourism have become the preferred way of hoarding and sharing experiences; increasing the value of the personal brand. Rail tourism has the potential to tap on the ethical tourist market as a more sustainable and more responsible way of travelling.

Actually, as environmental and ethical concerns increase, railways are surging as the environment friendlier option for short and medium distances.

The rise of "fly- less" movements together with improved convenience of rail over flying or road transport in short to medium distances and upgraded rolling stock is attracting more responsibly minded consumers to rail tourism.

Many airlines are reporting losing passengers to railways, while others are actually partnering with rail companies in order to entice travelers to choose railways for shorter trips.

Sweden, home of the "flight shame" movement, reported a 4% decrease in total air passengers in 2019, with domestic air travelers falling by 9%[14].

Dutch Railways NS on their part, recently reported a 10% increase in rail travel at the expense of air travel. They have also set up a partnership with Thalys and KLM in order to shift passengers towards rail for shorter intra-European legs, including a rail connection between Amsterdam and Brussels airports instead of flights[15] as part of the airline's decisive commitment to encourage less flights whenever railways prove themselves more or similarly efficient for clients. KLM's advertising campaign[16] encouraging clients and the rest of the industry to "fly responsibly" and use trains whenever practical is definitely a first in the industry.

Scientists and researchers in many areas are also giving up on flying, answering the call for more responsible flying[17] while at the same time raising the profile of rail travel. Institutions, like Barcelona Town Council, are pledging to avoid flights for distances lesser than 1000km[18] and to prioritize railways, in their bid to set up more responsible travel practices and diminish the carbon footprint.

The German government recently announced a new investment package of 86billion Euros for expansion and modernization of their rail network and infrastructure[19] in their bid to fight climate change by reducing the CO_2 footprint of their transportation sector.

In January 2020 Germany's rail company DB cut the fares on their long-distance tickets thus effectively passing onto passengers their governments' earlier reduction on VAT[20].

Increased public awareness is also driving the return of night trains to European routes, a trend spearheaded by Austrian Railways and followed by many other companies across the continent, amongst the Dutch NS, DB, Swiss and Swedish railways.

Being the main tourism destination in the world, Europe is perfectly placed to set up an example to show how its extended network and low-carbon footprint can contribute decisively to mitigate tourism's negative impacts on natural resources, pollution and social systems[21].

Rail tourism can also cater for the ethical traveler by ensuring that it complies with the principles of responsible tourism, ensuring that rail tourism products actively create positive economic and social impacts as well as environmental improvements in the communities it visits.

Ecuador's national railway company TrenEcuador's 2016 World Responsible Tourism Award as overall winner and gold mention for poverty reduction and inclusion[22] highlights the potential of rail tourism to become a force for good that connects with tourists' preferences and addresses their concerns.

Rail companies can increase their attractiveness for tourism markets by capitalizing honestly on those values and giving visibility and evidence of the benefits that rail tourism provides to local communities by sourcing locally and fairly in a consistent manner.

4. Methodology for assessing attractiveness of tourist products and destinations

A tourist product is a combination of attractions, experiences and services packaged and sold together, that satisfies the **needs and expectations** of tourists. A tourist destination is the geographical area in which tourists consume tourist products.

According to academic literature, there are different factors that determine the potential attractiveness of destinations. The weight and manner of cataloguing varies, but for the purpose of these guidelines **Buhalis' 6A classification** was chosen, because it provides a useful and flexible framework for destinations that has already been adapted for assessing rail tourism products attractiveness as well.

Table 1: 6A framework for the analysis of tourism destinations

Attractions (natural, man-made, artificial, purpose built, heritage, special events)

Accessibility (entire transportations system comprising of routes, terminals and vehicles)

Amenities (accommodation and catering facilities, retailing, other tourism services)

Available packages (pre-arranged packages by intermediaries and principals)

Activities (activities available at the destination and what consumers will do during their visit)

Ancillary services (services used by tourists such as banks, post, hospitals, etc.)

Source: Buhalis 2000[23]

The amount, variety and type of attractions, activities, amenities and services available, as well as accessibility and ancillary services at destinations will have an impact in the type of tourists the destination can attract.

Generalist tourists will be looking for different types of activities, while special interest tourists -like train lovers, for instance- will appreciate themed attractions, activities and services that allow them to obtain a deeper experience regarding their interest.

5. Guidelines to assess attributes that determine attractiveness of rail travel products and services for tourism

Research carried out in Taiwan during 2016[24] used a modified Buhalis' framework to identify and rank the main attraction elements for rail tourism destinations. To do this, the researchers chose representatives of academics, government and railway companies officials as well as representatives from rail heritage preservation groups and professionals from the tourist industry, particularly those specializing in rail tourism. All participants were asked to rank a series of factors according to importance in assessing the attractiveness of rail tourism destinations.

The results responded to each groups' professional bias. To academics, government and railway companies' officials, **architecture of stations, on board service, amenities and infrastructure and closeness of tourist attractions to railway stations** were considered the most relevant factors for tourist attractiveness.

For tourist professionals, the most important item was **accessibility, with frequency and connectivity of rail tourism products to general transit networks** ranking highest.

The table below shows how each different attribute ranked for each group:

Table 2: Comparison of the perceptions among different expert groups of the determinants of RTA

Dimension/Attribute	Industry practicioners		Academic scholars		Government officers	
	Weights	Ranking	Weights	Ranking	Weights	Ranking
Tourism attractions	0,274	2	0,413	1	0,467	1
Scenery along the route	0,043	12	0,044	8	0,054	8
Variety of rural branch lines	0,045	10	0,055	6	0,101	2
Variety of tour trains/charterer trains	0,038	14	0,017	19	0,103	1
Railway museums	0,025	18	0,071	5	0,035	13
Architecture of railway station	0,066	3	0,081	3	0,076	3
Railway-related souvenirs	0,013	25	0,038	12	0,027	15
Sight and attractions near the station	0,044	11	0,109	2	0,072	4
Accessibility	0,362	1	0,178	3	0,281	2
Train frequency	0,047	9	0,011	24	0,064	6
Train puntuality	0,029	16	0,024	15	0,057	7
Number of stops along the route	0,041	13	0,017	19	0,013	21
Ease of access to the station	0,065	4	0,046	7	0,036	12
Frecuency of transit connectivity	0,088	2	0,039	11	0,066	5
Types of transit transports	0,092	1	0,042	9	0,044	10
Amenities	0,22	3	0,318	2	0,105	4
Confort of seating	0,05	7	0,071	4	0,045	9
On-train dining services	0,034	15	0,023	17	0,013	21
Sleeping carriages	0,019	20	0,041	9	0,007	25
On-train entertainment equipment	0,014	23	0,111	1	0,014	19
Station/W area	0,052	5	0,036	13	0,015	18
Lodging/Catering services nearby the station	0,051	6	0,036	13	0,012	24
Complementary services	0,144	4	0,092	4	0,0148	3
Announcing systems	0,022	19	0,016	21	0,042	11
Information/Service centers	0,015	22	0,024	15	0,026	16
Railroad-supplied electronic devises	0,026	17	0,018	18	0,014	19
Railway/Railroad police	0,014	23	0,009	25	0,013	21
Emergency service	0,049	8	0,013	22	0,031	14
On-train service staff	0,018	21	0,012	23	0,023	17

Source: Chan et al., 2016

For the purpose of these Guidelines, a differently modified version of Buhalis' 6A framework is proposed. In this framework for assessing attractiveness of rail tourism for a given line, supply-related and market related attributes are assessed separately.

Supply-related attributes allow companies to assess the tourist potential of a given service, line or route by inventorying, weighing and ranking existing tourist attractions, amenities and activities both external to the itinerary and based on the internal attractiveness of stations, tracks and, or rolling stock.

Market-related attributes analyze the potential to generate or increase actual tourist flows: physical accessibility to the rail tourism products and services, or from established tourist assets to rail connections, as well as awareness among the intended audience of the existence of said rail tourism services and products.

Table 3: Attributes for Assessing Attractiveness of Rail Products and Services for Tourist Purposes

	Attributes	Components
Tourist appeal	**Existing Tourist attractions**	Assessment of tourist attractions & destinations served by rail services, type, frequentation, tourist behavior in order to rank potential of tourist attractions and feasibility of increasing or creating services to tourist destinations. Assessment of rail-based infrastructure and attractions with potential tourist use within vicinity of a tourist destination or creating a rail-based tourist attraction close to a tourist destination.
	Tourist-oriented amenities	Services and infrastructure on board trains that cater specifically to tourists' needs and enhance the value of the railway-based tourist experience.
	Tourist activities	Amount, type and quality of tourist activities -provided either by the railway company, the tourist company packaging the service or the tourist destination- available pre, during and post trip, related either to the railway infrastructure and/or the tourist attractions at the destination that allow the tourists to satisfy their motivations during a tourist trip.
Access	**Accessibility**	Convenient access to station, comfort of stations and trains, baggage storage, transport and custody faciites, access on and off trains, user-friendly information of itineraries, tourist friendly schedules, access and assistance for disable people and people with reduced mobility, access and connectivity with tourist attractions and general transit networks.
	Awareness of convenience	Enough and easily accessible communication of the convenience of rail services serving tourist destinations, attractions and or tourist purposes. Presence of railways in media and at travel decision making moments. Presence in tourist trade shows and tourist marketing and commercial companies' marketing and communication tools.
	Availability	Multi-channel availability, booking in advance available across several distribution channels, tourist friendly changes and cancellation policies, variety of means of payment, possibility of one-stop shopping for a tourist package, upselling and cross selling, multimodal, cross border, multi company connections, convenient rates, rate comparison tools, etc.

Source: Prepared by the Author based on Buhalis 2000, Chen et al. 2016

A railway company looking to increase its attractiveness for tourists will necessarily have to assess the combined values of tourist attractiveness, tourist awareness, amenities, activities, availability and accessibility of its products, services and destinations in order to create valid policies and strategies aimed at increasing frequentation for tourist purposes. Each attribute in turn consists of a number of elements that must be assessed and integrated into a strategy according to their strength and the needs of a particular tourist destination.

5.1. Attractiveness: Inventory of Tourist Attractions and Destinations

- Number and typology of main tourist destinations served

- Convenience in relation to other modes of transport

- Number and typology of secondary and or day tour tourist destinations served

- Attractiveness of rail-related infrastructure (stations, etc.)

- Attractiveness of rolling stock

- Existence of tourism dedicated rolling stock

- Attractiveness of the line (scenic)

- Rail-related attractions in the destination (museums, others)

- Technological innovations on trains, lines

By setting up this kind of inventory, the rail company can **identify potential for attracting tourists** within its existing routes. To assess the potential, tourist behavior while travelling to a given destination, region, country must be taken into account in order to better select the potential tourist lines, stops and attractions to be developed or highlighted.

The potential tourist value of tourist attractions will differ when attracting local, regional, national or international tourists. Railway- served tourist destinations must be ranked as well in terms of potential types of tourists they can attract.

Partnerships with tourist boards, associations and attractions at local, regional or national level are key for railway companies in order to better understand tourist flows and behaviors, as well as in order to accurately rank singled out attractions regarding their importance for established tourist markets.

Trenitalia's "Itinerari di Passagio" is a Trenitalia/Slowfood joint initiative. The Slow Food editor's itineraries encourage the use of the regional network for tourist purposes by highlighting 20 itineraries and suggesting more than 500 slow-food destinations, successfully combining "slow" transportation with one of the biggest drivers for tourist trips and excursions such as is tasting local food and specialties. Based upon an inventory of food attractions, the tourist activity becomes the driver that leads tourists to go explore the countryside by using regional lines.

The Italian National Commission for UNESCO collaborated with Trenitalia for the drafting of the descriptive texts of the individual sites on the publication entitled "UNESCO World Heritage".

This Travel Book is a tool to promote the visit of Italian World Heritage sites accessible by train (33 out of 54), contributing both to environmental sustainability and to the decompression of the best-known sites, encouraging a widespread distribution of the tourist flow and thus contributing to fight problems derived from overtourism in particular destinations.

© Trenitalia

5.2. Amenities: improving comfort entertainment and convenience

- Tourist lounge area and entertainments on stations
- Refreshment with local/regional specialties in stations and on board
- Full meal service on board
- Free Wi-Fi in stations/trains
- Baggage lockers on stations, baggage check in and transportation
- More leg-room
- Electric sockets for charging appliances
- Baggage storage space and racks on board
- Comfort of seats/common areas on board
- Entertainment on board
- Family friendly cars or seats
- Tourist information on board about the route or the destination
- Outstanding service/staff trained to help tourists' questions
- Premium class
- Themed cars
- Sleeper cars
- Panoramic windows
- Observation cars
- Lounge cars
- Themed entertainment on board
- Themed meals on board
- Bar selection on board
- Regional/typical souvenirs available on the station
- Rail themed souvenirs on the station
- Regional/typical souvenirs available on board
- Rail themed souvenirs available on board

When taking a leisure trip, passengers have different **expectations of comfort and entertainment**. Travelling has become a stressful part of the holiday process, whether by air or road. Travelling by railway poses a unique opportunity to **enjoy the journey as well as the destination**. Railway companies can achieve this by increasing the satisfaction of tourist travelers, turning the journey into a leisurely experience in itself.

In order to achieve this, companies must focus on the strengths that rail travel has to offer over air and road transport, in order to build on those strengths in the minds of travelers, be they railway users or not. From avoiding crowded roads to enjoying delicious food on comfortable and ample seats equipped with sockets for charging technological appliances and free Wi-Fi, creating comforts on board trains will go a long way to attract travelers.

Kids playground on trains: family friendly travel reaches new heights with a playground car on Finnish, French or South Korea trains or an entire train like the Hello Kitty Shinkansen in Japan.

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© JR-West, G604611

Tourist lounge area and entertainments on stations: Having pianos free of use for travelers has become very common in SNCF stations in France as well as in other parts of the world.

© Clément Gautier

Dining Cars: freshly prepared meals, seasonal and regional menus, themed, historical, Pullman style dining cars with classic upholstery, tableware and classic service are popping around the world as part of the rail travel attractiveness.

Railway companies around the world are engaging in upgrading their fleets, improving their dining cars and menus or directly renovating their fleets with new, upgraded luxury trains to enlarge their supply to cater to a growing demand for premium services.

Swiss Federal Railways, SBB, Austria Federal Railways, ÖBB, Germany's DB, Thalys or Eurostar are amongst those offering excellent food service on board.

Trenitalia has just started the new service "*pasto a bordo*" available in the Freccia Rossa (high speed trains). Travelers can book meals that will be brought to their seat during the journey.

Finnish railways have just ordered double deck dining cars that can also double as conference rooms. The menu is seasonal and based on local sourcing.

Amtrak on the other hand, has just announced the end of its traditional, renowned dining cars, doing away their famous on-board kitchen to create more flexible dining options.

For luxury tourist trains and sleepers, food service is also a large part of the attractiveness:

Japan's Train Suite Shiki-shima's dining car is run by Japan's first Michelin starred chef ensuring that the cuisine on board is definitely an important part of the luxury experience as well as its attractiveness.

Caledonian Sleeper brand new sleeper trains were introduced on the London-Glasgow/Edinburgh route on 28 April 2019. The new trains offer a choice of Classic, Club, Caledonian Double, Accessible Double and Accessible Classic Rooms, all equipped with power sockets, USB ports & free Wi-Fi. Breakfast is included and can be served on the compartment or at the lounge car, which also has a varied offer of classic Highland food and drinks.

Premium Class: The new Excellence Class on the legendary Glacier Express between St. Moritz and Zermatt promises a breathtaking panoramic rail journey that is more exclusive than almost any other. From 2 March 2019, passengers in the new premium-class carriages on the Glacier Express will enjoy optimum comfort with a guaranteed window seat and spectacular all-round views. A concierge will be on hand to take care of passengers' needs, so all they have to do is to sit back and admire the spectacular scenery as they are treated to champagne, tasty treats and a lavish, regional five-course menu including wine.

© RhB

Spa on board: A Spa car was included in the new Belmond Andean Explorer, offering a wide range of treatments and wellness experiences for passengers on board. A two-car spa operates onboard the Belmond Royal Scotsman as well.

© Belmond

5.3. Activities: Increase attractiveness by incorporating tourist activities at destination/along the journey

- Escorted tours/visits to attractions close to stations
- Typical food in stations
- Railway themed activities in stations
- Railway themed activities close to stations
- Tourist activities in stations (railway related or not)
- Tourist activities around stations
- Tourist attractions and activities reached by train

Leisure tourist trips must offer opportunities for tourists to engage in activities that allow them to experience the destination in a general manner (visits to tourist highlights) or according to their motivations, by engaging in activities or visiting themed attractions, like rail heritage, that are part of the motivation for travelling by rail and will contribute to enhance the experience.

For railway companies this falls well beyond their mission as transportation operators. However, if they want to actively attract tourists, companies must take into account that tourists need entertainment, attractions, activities and tourist services at destinations as well as during the journey in the case of tourist trips.

This means that rail companies must cooperate with local tourist and attraction managers stakeholders, or else start offering access to tourist activities themselves, in order to fulfill tourists -as well as travel agents- expectations.

The level of cooperation may vary from just offering information about the destination to actively engage in the booking process of activities and services at destination.

Spanish state railway operator **RENFE** Galicia Tourist trains offer a unique opportunity of discovering the region through several themed train routes: The Route of the Light Houses, the Route of Pazos and Historical gardens, six different Wine Routes, The Route of Roman Heritage in Lugo, Route of Orense Spas, among others.

In partnership with Galicia Tourist Board and the public Agency for Economic Development, the day tours offer tourist guides on board, bus transfer and entrance fees to attractions and activities along the itinerary.

Themed trains, like **Dean Forest Railway Santa Special** rides, seasonal trains like **Foliage Trains**, all heritage railways offering packaged tours and activities around historic railways for tourists (UK Heritage Railway Association's one hundred page brochure is an excellent sample of how to package activities together with heritage railways in a manner that is useful and attractive to travel agents and tour operators as well as individual tourists)

Catalunya Government Railways, **FGC**, managed ski trains, including rail access bus or rack train as well as ski passes all included. The "Turistren" or tourist train products include different tourist activities like guided visits to wineries, museums or tourist attractions close to the main urban areas combining different services in one single ticket.

Austrian Federal Railways, **ÖBB**, Plus Tickets offer the possibility of booking a transfer, a hotel, a sightseeing tour, a museum or gallery ticket at destination with the ticket are only a handful of examples of access to tourist activities sold together with railway trips.

Many companies have created their own tour operators in order to legally package different services and activities, like meals, guided visits to tourist attractions or multimodal transportation, while others give tour operators access to inventory in order for them to be able to add other services to their clients as well.

Luxury tourist trains: The also so called "**cruise trains**" offer different activities both on board as well as off the train, like visits to local museums and tourist attractions along their several day itineraries, integrated in the tourist package.

Some, such as California Coast Starlight or Zephyr's Rails and Trails programs have National Park Service guides jump on board as Guest Speakers to give talks about wildlife and geology along the route.

Golf journeys aboard The Belmond Royal Scotsman train include rounds at some of Scotland`s most prestigious courses.

The last day of the routes of Renfe's luxury train Al Andalus offers, after enjoying the last breakfast on board, a tour to discover the former capital of the Medieval emirate and the caliphate of Al Andalus, when it became the largest, most cultured and opulent city in Western

© Renfe

Europe then the customers return to the train for lunch and a scenic ride on the Al Andalus on the way to the Andalusia capital: Seville to finish up the trip.

5.4. Accessibility: Easiness and convenience of physical access, information, experience, safety and security.

- Intermodality (Rail +Air, Rail+Bus, Rail+Boat)
- Convenient access to station by public transport system
- Convenient parking areas in stations
- Convenient connection by public transport system from station to attractions
- Punctuality
- Enough frequencies
- Frequencies and schedules adapted to tourist behaviors, seasonality
- Child, diminished mobility user- friendliness of infrastructure and activities
- Cars adapted to tourism activities
- Cleanliness and state of repair
- Tourist friendly refund policies
- Tourist friendly complaint management system

In order to position rail tourism as an option during a tourism trip in the mind of travelers, be it as mode of transportation or experiencing a dedicated rail tourism product, companies must improve access to their products and services in a manner that is easy, convenient and tourist-friendly.

Connectivity to main transportation network to arrive at or from the railway station to the tourist attractions and destinations is one of the most important issues when thinking of making rail travel accessible and attractive for tourists and tourism companies. Coordinating with local transport networks and tourism attractions is key to ensure tourist friendliness in terms of parking spots, frequencies, connections and opening and closing hours of attractions.

The combination of train ride and steamboat ride along the SBB's Gotthard Panorama Express is an example of intermodality.

In Slovenia, Julian Alp Train, operated by SZ, runs every day, from Ljubljana to Bohinjska Bistrica, the trip takes 2 hours, from Sežana to Bohinjska Bistrica the trip takes 2 hours and 25 minutes. Passengers with a valid day return ticket have free of charge ride with bus from railway station Bohinjska Bistrica to the lower station of cable car.

Physical access for tourists is of key importance as well: easy access on and off cars, ample space for baggage and special sport gear as well as available support for

© SZ

people with reduced mobility, families with young children, etc., are among the factors rail companies may tackle to make themselves more tourist-friendly.

VIA RAIL Canada's support person free ticket policy is clearly visible on their website, as is the policy for assistance dogs. The company also has a clear policy regarding supporting people who need assistance with baggage, or for people with visual or hearing reduced capabilities. Also, VIA has agreements with a number of multimodal transportation companies at destinations in order to improve travel options and access to their clients.

From 2023, all Swiss Trains including Panorama trains have to fulfil Swiss law for better accessibility in the train-network for people with reduced mobility.

UIC members have invested to simplify international train travel for people with reduced mobility by creating the PRM Assistance Booking Tool, a web-based application that helps to assure and facilitate the booking of assistance services for passengers with reduced mobility (PRM) for international journeys throughout Europe.

Accessibility for tourism and leisure users means companies stepping outside their comfort zone and going the extra mile into catering for users that have different needs and expectations than regular commuters, and that stations, selling systems, information systems as well as rolling stock and service must be adapted specifically for them.

Night trains: Also taking into account tourist behaviors and needs in order to identify potential opportunities to cater for unmet demand needs as in the case of sleeper trains connecting business destinations across Europe.

Demand for international rail services has grown significantly during the first half of 2019, aided by increasing awareness of sustainability and measures to protect the climate.

A study by the Institute of Mobility Policy (KiM), part of the Dutch Ministry of Infrastructure, has concluded that there is a strong case for the reintroduction of overnight services from the Netherlands to other European countries, including trains from Amsterdam to Vienna, Munich, Zürich, Prague, Turin and Milan, with annual ridership estimated at between 700,000 and 1 million passengers.

ÖBB as the European market leader in night travel continues to increase its network and to optimise the level of comfort for their passengers. The next generation of sleeper cabins and couchettes is scheduled to be in service in 2022.

The seven-part next-generation Nightjets consist of two seating cars, as well as three couchette and two sleeper cars. Cutting-edge design is combined with even more comfort. Additional mini suites in the couchette cars offer even more privacy for those travelling alone. In the standard and deluxe sleeping compartments, travelling is even more comfortable with your own shower and toilet. Family compartments will, of course, continue to be available. A new on-board feature is the free Wi-Fi, which was previously limited to long-distance Railjets and is now also available to passengers on the new generation of night trains.

As ÖBB's Nightjet service linking Zürich and Basle with Berlin and Hamburg has reached its maximum capacity due to strong growth, the two railway companies are studying how to meet demand. The overnight service between Zürich, Innsbruck, Salzburg and Prague is currently operated only with sleeping cars, so the two railways together with Czech Railway (CD) are examining whether couchette cars can be added to the train.

SBB and ÖBB are also assessing which cities can be added to the Nightjet network to provide more overnight connections to Switzerland – Zürich is already the second biggest hub for overnight services in Europe after Vienna. A Vienna- Brussels connection was launched in January 2020.

Giving corporate travelers greater access to sleeper trains serving short and medium range destinations will no doubt greatly increase frequentation in those routes, boosting demand for business as well as tourism travel.

Creating frequencies that take into account tourists' schedules -on vacation of for business purposes- is another form of accessibility that may help rail companies see their tourist demand increased by catering to the growing market for short breaks or city breaks tourist escapades.

5.5. Awareness: Placing railways as an option in the mind of tourists

- Tourist info on panels and on screen in stations in languages
- Tourist info on ticketing systems in languages
- Tourist info on -board (screens) in languages
- Tourist friendly itineraries highlighted on general info
- Tourist friendly itineraries highlighted on website
- Tourist friendly itineraries on tourist guides of the city/region/country
- Tourist friendly itineraries on websites of city/region/country
- Railway information on tourist attractions (cross marketing)
- Railways on the news: new investments, new openings (local, regional, worldwide)
- Active marketing campaigns to reach stakeholders and potential rail tourism customers
- Railway tourist trains in tour operators/travel agents' brochures, websites, packages, tourism trade shows
- Tourist railways in media (books, guides, movies, documentaries…)
- Railways in general and rail journeys in media (video, movies, press, books, travel documentaries)

In order to generate tourist demand for rail tourism it is important to raise awareness of potential and convenience of railways for tourism, whether as an alternative or a complementary mode of transportation, depending on the product and destination that is being promoted.

Unless the tourism industry is made aware of the tourist products or destinations there cannot be a surge in demand. Marketing and communication across distribution channels and directly to potential clients is key in order to create awareness and position tourism destinations and products in the mind of potential consumers.

It is also important to keep in mind that railway companies have a large potential captive audience amongst the crowds of current rail users, who can be more easily made aware of the convenience of railways as mode of transportation for tourism and leisure purposes making the information available during their daily commute.

Internal marketing campaigns to reach **frequent or occasional users** can be very cost effective, as companies can use the same means they use to reach their current audience to introduce to them new products, services and or destinations.

Identifying tourist potential for commuter routes and then marketing them to regular users through icons or color codes on printed or digital itineraries, messages on social media, loudspeaker or video information and ads on screens in stations or on board are accessible means for railway companies to create awareness of tourist potential among regular users.

On the other hand, **travelers who are not railway users** must be reached at the other end, this is, at tourist attractions or destinations in case of potential domestic and repeat travelers or through travel and tourism companies and destination websites if the company aims at attracting travelers at their planning stage.

In this case companies must identify the tourist highlights served by railways that have the best potential for international tourists to consider using railways as their main mode of transportation, or for a leg of their journey, or to book a rail- tourism dedicated product.

Creating awareness in an advertisement saturated market requires strong partnerships and a deep knowledge of the channels used by potential tourists to select their travel destinations and plan their journeys.

Tour operators and destinations allocate important resources regularly to marketing destinations and activities, as well as packaged trips. Fam trips that allow travel agents to experience rail products for themselves result in increased coverage and visibility in the tour operator marketing content.

Media coverage also plays an important role in creating awareness towards tourist products or destinations, and in positioning different issues in the collective mind. Media coverage of latest investments in high speed investments across the world, or the upcoming changes in railway competence across Europe, for instance, are issues of general interest that are being covered with some intensity by media. New openings of dedicated tourist trains or upgrading of existing fleet also help create media attention that translates in increased visibility for rail tourism.

Railways have always been present in pop culture: Books, movies, documentaries as well as launching of new dedicated tourist products contribute to create public interest and media coverage that translates in increased public interest towards railway journeys. Press trips for journalists to discover rail-based tourism products result in increased coverage by general interest as well as specialist travel media.

Classic travelogues or tourist guides that feature rail tourist products also contribute to increase awareness. The same can be said of dedicated websites, blogs or social media accounts dedicated to railways, like the well-known Seat61, which also contribute to mainstreaming different aspects of rail travel.

Rail companies willing to increase tourist frequentation must be able to capitalize on that awareness by taking advantage of momentum and positioning their products towards the interested consumer. Generalist or specialist tour operators, travel agents, destination tourist boards, travel journalists and writers are natural allies for railway companies in order to increase awareness and generate interest that translates in sold tickets or rail dedicated tourist products.

Tourist- dedicated railway companies make regular use of tourism marketing tools and strategies, from presence in tourist trade shows, to marketing campaigns, dedicated websites, social media strategies, etc., that ensure they reach travel agents and direct clients with marketing and promotional materials that create awareness of their routes, attractions and activities.

Other, more generalist-oriented railway companies have also a clear marketing approach to creating tourist awareness, by showcasing and marketing their tourist dedicated products separately with a differentiated strategy. Partnerships with tourist destination management companies, accommodation, tour operators and travel agencies, creating marketing and commercialization tools, dedicated sales channels for the trade, supporting destination presence in tourist trade shows are some of the tools the tourism sector uses regularly to increase awareness towards tourist products and destinations.

World Tourism Exhibitions site offers a detailed list of tourism trade shows and exhibitions by country and specialization around the world. Depending on targeted markets and tourist segments companies will define their tourism commercialization strategy, attending mainstream or specialized trade shows, on their own or through selected travel and tourism partners, be it specialist or mainstream tours operators.

When planning the trade show strategy it is important to know the market to reach, whether direct or trade, and the type of trade show they attend (MICE, Luxury, Destination based, etc) There exist a number of sites that rank travel shows depending on specialization, type of audience and type of exhibitors.

Depending on the source markets targeted, smaller, niche oriented, or larger, generalist trade shows will be of interest to rail companies. For smaller, heritage railway products, perhaps local or regional shows that focus on direct clients are more interesting than larger, international shows.

Setting up partnerships with specialist rail tour operators is the easiest way to gain a larger tourist audience.
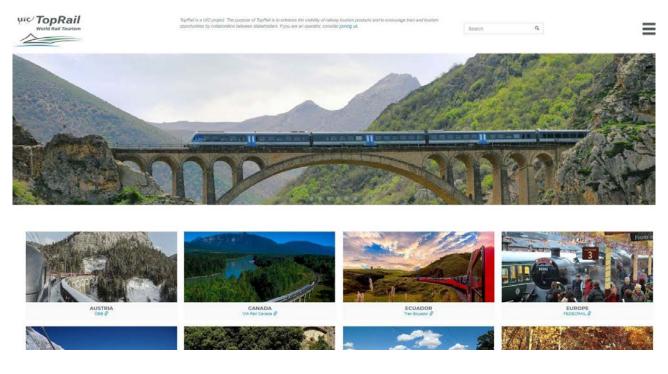
Grand Train Tour of Switzerland promoted jointly with My Switzerland. A joint promotional effort at country level for inbound tourist markets packaging a tour of Switzerland's highlights using tourist dedicated rail products. Partnerships with national tourist boards for dedicated tourist products increase the outreach of Swiss rail companies for international tourist markets. The web includes another section dedicated to mountain railways with information, timetables and direct link to SBB booking engine.

Europe by Rail classic guidebook that offers dedicated tourist information of European destinations reachable by railway. A classic and perfect example of how to blend the railway trip with the tourist attractions in chosen itineraries, making it easy for the potential rail tourist to make a decision about travelling.

The UIC TopRail website seeks to raise the profile of tourism by rail all over the world. It was created with latest information directly provided by its railway companies and has the ambitious goal of presenting a global overview of the existing leisure experiences by rail.

The site, which already provides a large amount of information on tourist lines and trains by country, will undergo a process of continuous improvement and will feature new functions, with the option of navigating throughout the site using key words and a focus on tourist lines and trains worldwide.

It also includes regularly updated UIC e-News articles, as well as information about events and new products regarding the issue of tourism by rail.

DININGCAR @_DiningCar is a small but dedicated social media account in which engaged followers post pictures and info about menus and renovations on board railways worldwide. Despite small reach, it represents a clear example of the power of social media and User Generated Content or UGC to raise awareness about the issue.

In present "instagrammable" culture, social media remains the perfect media for creating awareness about the attractiveness, convenience and availability of railways for tourist purposes amongst younger audiences.

5.6. Availability: easiness and convenience in the purchase process

- Longer term booking horizons

- Convenient online booking system allowing for connections

- Convenient online booking system

- Convenient and varied payment methods

- Convenient changes and cancellation policies

- Convenient and varied modes of payment

- Convenient access to combined local public transit tickets

- Convenient connections /day/week/month passes/discounted prices for combined tickets

- Convenient conditions for travel agencies and tour operators to sell packages including rail transportation

- Integration of ticketing systems along the client's journey: multi destination, multimodal transportation, multi service, access to comparison to best rates, discounts or special conditions in tourist attractions reached by railways

Last, but not least, making the rail tourism product available means that it is available when and where the traveler is making his decision.

While technology allowed for airlines ticketing systems standardization years ago, railways have remained fragmented and unconnected.

Companies like Sabre or Amadeus were born by the need of airlines to declutter and optimize their inventories in times of increasing costs and surging competitors: Data sharing and availability facilitated by Global Reservations Systems were among the most important drivers of international travel in the last two decades by allowing information and creating a competitive market place that increased availability and access to air seats to the client.

The same transformation is key for railway companies to achieve mainstream markets and become actual alternatives or top of the mind options for the traveler.

Convenience, user-friendliness, simplicity of cancellation policies, flexibility, long term booking horizons, integration of destinations, availability of connecting trains across borders and companies, as well as across providers, are key to pushing rail of different services along the value chain that makes up a tourist product will be the key to allow rail tourism to reach mass markets.

Integration of complementary, ancillary tourist services to the package, be it directly by railway companies, or allowing tourist companies the necessary flexibility and incentives (commission, allotments, release time) to package tours that include different modes of rail transportation in their supply will also go a long way in

increasing tourist flows to rail tourism products and services.

Easy availability through booking systems, connectivity of transit systems, booking, payment and cancellation policies are also practical issues that tourists and travel and tourism companies alike require are taken into consideration by companies in order to enhance availability of tourist services and encourage purchase.

Increasing numbers of independent sellers are making railways more available to the general public as well as tourist trade companies: Trainline, Where is my train, Rail Europe, RiotoRome, Omio or Save a Train, are but a handful of platforms that are pushing availability of rail tickets and increasingly complex, cross- border, multimodal, multi company itineraries for rail travelers, setting the industry towards what other systems did for airlines during the 80s and 90s.
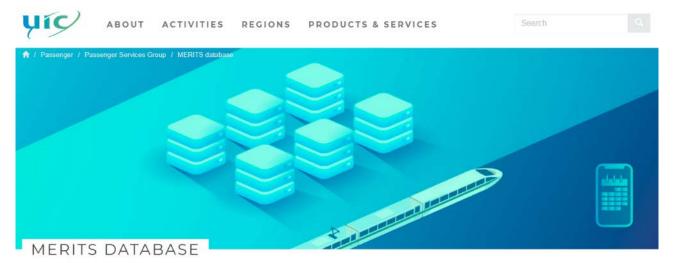
Railway companies are upgrading online booking systems, improving websites as well as business to business and business to consumer access to their inventory to encourage and facilitate sales. Some companies, like Renfe or SBB, have created their own tour operators in order to sell their own packaged tourist products directly to clients or through travel agencies. Others rely on specialist industry partners, like vacations by rail, rail booking, etc., to sell, charter or operate tourist trains or package tourist products using railways.

Other companies operating luxury rail tours, like Belmond or Golden Eagle schedule, operate and sell their luxury travel products directly or through a large network of travel agencies. Some tour operators on the other hand, like Kuoni, create specialist branches to sell luxury railway vacations within their mainstream business.

Tourist industry-friendly policies regarding accessibility to products when and how the industry and the tourist need them are key to transform awareness and interest into sales.

International ticket distribution allows customers to benefit from a "one-stop-shop" service when purchasing tickets for international journeys. UIC provides standardized interfaces for distribution systems to enable ticket distribution by third parties.

MERITS (Multiple East-West Railways Integrated Timetable Storage) is a database, owned by UIC, containing the integrated timetable data of many European and some non-European countries (Russia, Turkey, Belarus), comprising a few hundred railway undertakings (RUs).

6. Guidelines on how to increase attractiveness of rail tourism according to tourist patterns

Rail travel is seldom first choice of transportation for travelers booking a vacation. Though railways and tourism grew up together, in the last decades railways fell back as preferred means of transportation in favor of airlines and road transport. Also, the choice of transportation when booking a holiday is usually not a determining factor; speed, convenience, safety and price are usually the deciding factors.

Even when trains can be a more convenient holiday option, be it by offering a scenic route across renowned tourist attractions, or a high speed service to a tourist destination that is four or less hours distance from the origin, or night trains, or trains equipped with Wi-Fi and lounge areas that are more comfortable than packed airplanes or car or bus seats, railways are not always a top-of-the-mind option, or even considered when planning a tourist trip.

In the last years, though, interest in rail travel seems to be a surge of interest in rail travel, mostly across short and medium distances. With the growth of high-speed networks as well as fragmentation and increased competition, more convenient options are appearing for travelers, with companies also investing in upgrading rolling stock and struggling to attract passengers from air routes through convenience and better customer experience.

On the tourist side of rail business, train journeys have become a dedicated tourist product in themselves. The world-famous Venice-Simplon Orient Express or Trans-Siberian railways are but the most renowned historical examples of this trend.

In the last years, new cruise trains have appeared across the world, whether by undergoing important investments in upgrading their rolling stock and creating new categories of services, or with brand new products and destinations like Belmond's Irish Grand Hibernian, Royal Scotsman, Peruvian Andean Explorer or Japan's Shiki-shima Express.

The Blue Train, India's Palace on Wheels, Spain's Trans Cantábrico Gran Lujo, Canada's Rocky Mountaineer, Australia´s The Ghan or the Glacier Express are other successful examples of this burgeoning trend that focuses on high-end services and experiences on board combined with off board excursions to renowned tourist attractions and unique experiences.

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While barely 2% of international travelers use rail as their mode of transportation, in Europe 78% of travelers never use railways for international trips, and around 60% use railways for a regional or national trip once a year or less. However, the topmost motive for taking a rail trip amongst users in Europe (58% of respondents) is "another leisure activity" or a "holiday".

MAIN REASONS FOR TAKING THE TRAIN

Leisure activities	Going on holidays	Traveling to work/school/university	Business trips
35 %	**23 %**	**16 %**	**9 %**

These figures are proof that there is a clear opportunity for increasing the use of railways for tourist purposes. In order to tap this market, there appears to be two major strategies: Fostering the use of railways as a mode of transportation during a tourist trip and creating dedicated rail tourism products that diversify the portfolio of tourist supply in tourist destinations.

The potential for each strategy will depend on an assessment of the previously mentioned attributes, and also taking into account tourist behavior in the tourist destination at micro or macro level.

According to the model developed by Lue, Chi-Chuan et al[25] there are five alternative spatial patterns of pleasure vacation trips, four of which include visiting different destinations, and which must be taken into account when considering promoting the use of railways for tourist purposes.
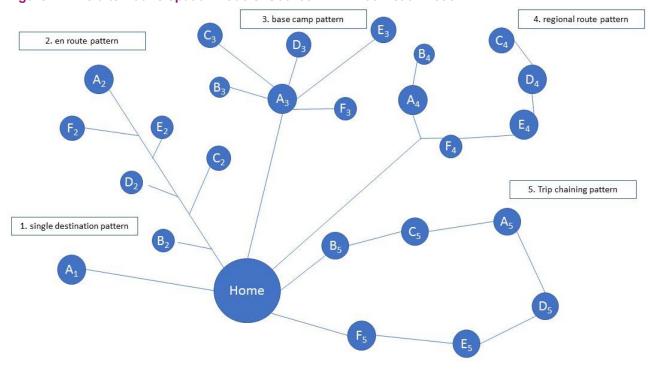
Figure 1: Five alternative spatial models. Source: Chi-Chuan et al. 1993

Understanding these patterns is important in order to identify the different ways in which railway companies can increase their participation in the tourist market of a given region.

6.1. "SINGLE DESTINATION" pattern

When the destination is a single place in which the visitor engages in different activities, not necessarily included in the ticket. Railways compete with other modes of transport and must make their services appealing and accessible enough in order to attract tourists.

FGC, Ferrocarrils de la Generalitat de Catalunya, operates several tourist trains to unique tourist destinations, amongst them the Monastery of Montserrat, one of the most important visitor sites in Catalunya, with more than 2,7 million tourists yearly. Of these, almost 1 million use the FGC operated rack railway ad cable car to reach the monastery, which are also part of the attractiveness of the destination.

© FGC

Amongst the different ticket options, the Trans Monserrat combined ticket includes all the means of transportation needed to reach the tourist destination: metro, railway, rack train and cable car, as well as Santa Cova funicular on operation days plus the entrance ticket to the audiovisual exhibition. The "Tot Montserrat" option adds meal and the ticket for the museum. Last, the Montserrat Express railway and rack train tickets, plus discounts for funicular and other services in Montserrat plus a welcome pack including an MP3 audio guide and some tourist information.

© ZSSK

FCG, ÖBB, SBB among other offer railway trips to ski resorts, which also offer combined cable car tickets and can also include accommodation on the same ticket.

ZSSK provides ecological passenger transport in High Tatras electric railways and cog-railway (the only one of this kind in Slovakia), connecting very well-known tourist centers and starting point Štrbské Pleso with the station of Štrba.

6.2. "EN ROUTE" pattern

This happens when several secondary attractions or destinations are placed along the way to or from a primary destination.

Tourist trains taking advantage of this pattern usually offer a closed itinerary along a well-established tourist routes including sleeping arrangements (either on or off board) as well as meals and tourist activities, which is the case of most so called "cruise trains".

Renowned tourist attractions, as well as the railway's own brand combine to create attractive, high-end products that call back to the golden age of rail travel, offering a lifestyle vacation at a more leisurely pace. The comeback of these luxury train journeys includes refurbished rolling stock with amenities such as new panoramic cars or spas, sleeping and dining cars usually in cooperation with well-known designers, luxurious materials, extraordinary service and outstanding chefs creating fine dining experiences based on local cuisine with a twist, following the latest trends in luxury travel. Besides the rolling stock experience, the tourists experience usually includes high end attractions or access to unique experiences while on tour.

Belmond's Trains trains offer luxury accommodation in enchanting vintage cabins, world class cuisine and an extraordinary array of experiences along the way across UK, Scotland, Ireland, Peru, Southeast Asia as well as the renowned Venice-Simplon-Orient-Express across Europe. All trains operate under the same model of combining on board amenities, comfort and décor with outstanding tourist activities along well-known tourist routes and highlights.

RENFE Transcantábrico, Spain's oldest luxury train, has been in operation since 1983 using the narrow-gauge tracks in northern Spain. Since 2015 it operates two itineraries and classes: the Clásico, with original Pullman cars, and the Gran Lujo, an upgraded version.

EL TRANSCANTÁBRICO GRAN LUJO

Come and join us to the North, to the greenest part of Spain, for eight days of sheer joy aboard El Transcantábrico Gran Lujo.

Golden Eagle, has been operating exclusive luxury trains through Russia, Europe, Central Asia and China for 30 years, most notably the Trans-Siberian, but also a large array of combinations from the Silk Road to China and Tibet, Castles of Transylvania and the Artic Explorer into the Arctic Circle.

Many other trains, like **Japan's Shiki-shima**, the **Blue Train** and **Rovos Rail** in South Africa, the **Rocky Mountaineer** in Canada, **The Ghan** in Australia, India's **Palace on Wheels** and the **Maharajas' Express** all follow the same pattern of astounding scenery, excellent on- board food and service, and preset itineraries and departures including accommodation and tourist activities as part of a comprehensive tourist journey.

In other cases, the product is an open ticket that allows travellers to engage in the discovery of a destination along the railway line at their own pace, in a hop-on hop-off scheme that allows more personalization and self-organization, catering for tourists with different budget and time constraints.

Cinque Terre train card, for instance, gives unlimited access to trains serving the Cinque Terre as well as access to all hiking trails, National Park eco buses, Wi-Fi, etc. making it a convenient way of exploring the famed destination in a self-organized way.

Rail Europe European itineraries suggests European itineraries that cover different tourist highlights in Europe based on proximity and self-organization, with suggestive branding that appeals to tourists, "Atlantic Gems" "Midnight Sun" "Magic Cities of Germany" etc. using tourist highlights to create appeal and make the deal more attractive to tourists.

6.3. " TRIP CHAINING" pattern

This pattern involves visiting different main attractions at a long distance from each other. It is a typical way in which tours are arranged for overseas visitors, and how most rail passes work. While the convenience of a single pass is clear for customers, companies have been improving accessibility and flexibility of their offers eliminating restrictions and creating more options to suit preferences, creating suggested itineraries and partnering with tourist suppliers in order to ensure users' access to diverse tourist attractions and services. Information on webpages focuses as well on tourist attractions and highlights, also adding discount tickets to attractions in order to help clients plan their itinerary according to their interests.

Interrail pass for European residents and its overseas tourists dedicated twin Eurail pass grant access to 31 countries with 1 single rail pass. Since the first Eurail pass was sold almost 60 years ago, the company has been offering different, segmented choices, from the One country Pass, or the Global pass for 3 days within a month, to suggested packages or a 3 month Global pass, with choice between first and second class tickets, as well as youth and senior (over 26 years old) passes.

The pass offers free hop-on access on many trains, while others like high speed or sleepers require reservation. It also offers access to tickets on selected multimodal transportation partners across Europe. On their website clients' can find rail lines maps, timetables, as well as access to a rail planner app, destination guides as well as information about music festivals in Europe. The Interrail Packages offer pre-booked packages of different duration across main European tourist destinations as a one stop shop that includes the dates, required bookings on special trains and accommodation. All passes include dedicated support in pre booking, during travelling and afterwards.

Swiss travel pass: Its four modalities: Swiss travel Pass, Flex, Half Fare and Coupon Pass, allow for customers to choose the more convenient option depending on the amount of flexibility they require. Apart from multimodal tickets, some of these passes also include tickets to the most visited rail attractions, access to mountain trains and urban public transportation systems as well as discounts at more than 400 tourist attractions in the country. Through partnership with the Federal Tourist Board, MySwitzerland web page offers a dedicated amount of tourist information that allows potential tourist to plan their journeys and buy the pass that better suits their needs easily.

© JR-East

JR East Pass allows unlimited rides using reserved seats on the ordinary cars of limited express trains (including Shinkansen), express trains and local trains on JR East trains lines, Tokyo Monorail lines and Sendai airport transit lines among others.
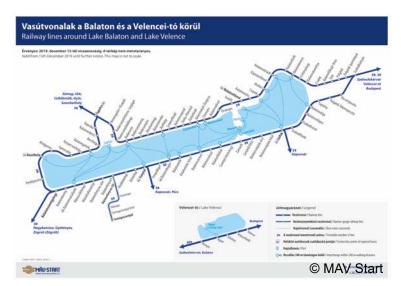
Segmentation of passes, like VIA Rail Canada (Leisure pass, Youth Pass, Canada Pass) allows for different motivations and needs to be taken into account in the age of personalization, making train travel more appealing to consumers.

6.4. "REGIONAL TOUR" pattern

It also implies several destinations but closer to each other. The destinations do however not need to be in the same country.

The Balaton in Hungary is a regional tour pattern as it has several popular destinations relatively close to each other and reachable by MAV START trains.

Railway lines around Lake Balaton and Lake Velence

© MAV Start

Lake Balaton is the largest freshwater lake in Central Europe, and it represents one of the most significant natural treasures of Hungary. It is a popular tourism destination due to the pleasant temperature of the lake, the favorable climatic conditions, the variety of beautiful landscapes and the diversity of cultural-historical assets. Tourism value of the Lake Balaton region is not only determined by the lake water quality and quantity, but also by the unique beauty of the natural and built environment, long sandy beaches, beautiful vineyards and also the widespread recreational services built on local traditions.

Both tourists and locals enjoy travelling on the unique narrow-gauge railway at Balatonfenyves (south of Balaton). The small heritage train travels 14 km with beautiful land scenery from Balatonfenyves to Somogyszentpál.

Trains run frequently throughout the Lake region according to the needs of visitors. In the tourism season there are many direct connections to Lake Balaton from various parts of the country (from Budapest almost all connections are direct). All types of tourist, families, cyclists, elderly can find suitable trains with low floor, air-conditioning, sockets, Wi-Fi service, dining area, even high capacity bicycle carriers. Traveling by train around the region allows tourists to enjoy the beautiful scenery of the blue Lake Balaton and also it is an eco-friendly mode of transport.

© MAV Start

Trainose offers one of the most picturesque day rail trips in Greece on a 0,75 cm narrow gauge line. The **rack train from Diakopto to Kalavryta** runs for 22 km crossing one of the most beautiful sceneries in Greece along the gorge of Vouraikos river between the small town of Diakopto at the northern coast of Peloponnese and the tourist mountain village of Kalavryta, at an altitude of 750 m.

Departing from the shores of the Corinthian Gulf, it crosses the Vouraikos Gorge, which forms small and bigger waterfalls and natural pools. During the journey the train also passes through a semicircular cave, where the stalactites have created a beautiful scenery resembling a courtroom.The train stops at Zahlorou station, the latter being a convenient stop for visitors of the Mega Spilaion Monastery. From that point, the trip continues for another 18 kilometers, with a stop at the village of Kerpini before it reaches Kalavryta, its final destination. Kalavryta, preserves its historical significance, as well as natural beauty, is a very popular and important tourist destination, is famous for its ski center, one of the largest in Greece and is also one of the few places in the world combining mountain skiing with swimming being very near to the sea at Diakopto.

© Trainose

6.5. "BASE CAMP" pattern

It involves visiting multiple destinations either as day trips or over-night stays, returning to one main destination or base in between. Regional and Base camp apply as well for day visitors and residents, who are more easily attracted to one-day tours.

Both types of tourist behaviors benefit from day tours that combine the scenic and slow travel appeal of trains with packaged tourist activities to tourist attractions and destinations for a return trip. Most successful examples develop around a theme, which makes whole package more easily identifiable as a day activity that caters for special or general interests:

Napa Valley Wine Train, in California, or **Tequila Herradura Express** in Guadalajara Mexico, combine branded products like California wines or Mexico Tequila with a day experience of tasting and touring on board historical trains. Visiting wineries or distilleries on board a train while tasting different versions of the product is a successful trend that is surging worldwide at a pace with the growth of culinary tourism.

Montreux-Berner Oberland chocolate and cheese trains pair these two world renowned specialties with regional wines, scenic routes, museum visits and tasting.

Catalunya's **FGC tour train** offers rail-based day tours and activities from Barcelona to the surrounding tourist attractions, capitalizing on Barcelona as one of the top-ranking urban destinations in Europe.

Dinner on Steam trains: Brunch, Lunch, Tea or dinner on board UK heritage steam trains. There are dozens of heritage trains offering extraordinary culinary experiences across UK, from Belmond British Pullman to Avon valley Sunday Dining Trains, fine culinary experiences are paired with historical trains and sold as one day experiences.

Themed Trains offer on board activities often related to a particular theme, historical re-enactment or special interest or event.

Great Central Railway Murder Mystery train recreates a murder mystery during a five-course dinner.

Renfe Heritage "Strawberry Railway" re-enacts the 1951 journey of the first Madrid railway, the second in Spain, from Madrid to the Royal Palace of Aranjuez, on board a heritage train that uses carefully restored stock from 1914 and 1930. Hosts dressed in period costumes offer historical information as well as the famous strawberries from the which the train derives its name. In Aranjuez, a UNESCO World Heritage Site, tourists visit the Royal Palace and Gardens, and can also visit either the Barge or the bullfighting museum.

The Portuguese railways (CP) organize every year in March the **Almond Blossom circuit**. This magnificent journey crosses the huge Douro region, up to Pocinho, where the green backdrop is speckled with the almond trees in bloom, on a circuit back through time and local traditions.

Special trains from Oporto Campanhã to Pocinho and back. From Pocinho there is a choice of three road circuits that include guided tours to museums, monuments and overwhelming landscapes of the region of Trás-os-Montes.

Depending on the importance of the tourist flows and the tourist assets in the territory, rail companies may choose between partnering with tourism industry to pair up railways with renowned tourist destinations, events or attractions by improving awareness, access, convenience and availability, or explore the possibility of creating dedicated rail tourism products. In each case, dedicated tourist information, marketing and commercialization strategies will be necessary in order to attract tourist audiences.

Rota das Amendoeiras
Almond blossom circuit

© CP

The table below details all types of potential tourist products, be general or dedicated, that companies can assess depending on the behavior of tourist flows in a given area.

Table 4: Strategies for Increasing Tourist Attractiveness of Rail Tourism products based on Patterns of Tourist behavior

Patterns of tourist behaviour	Strategies	
	Increase Use of Railways in tourist trips and upgrading existing infrastructure	Dedicated Tourist Product
Single destination En Route	Promote and raise awareness about the convenience of railways to reach a tourist destination from the point of origin Promote a multimodal ticket to reach several points along the route Provide enough frequencies and allow intermediate stops with a single (open) ticket over a certain period of time.	Create packages or special services to a particularly frequented destination (Beach trains, chartered trains to events, etc.) Include rail related attractions to foster awareness and frequentation. Promote and sell through tourist distribution channels Create tourist attractions in stations along the route to encourage hop on hop off use of the rail open ticket and crate tourist flows to the rail themed attractions as well as to the attractions on the route. Create dedicated trains that cover the route and offer tourist activities (Rail and other) on and off board that are sold as a package through tourist distribution channels.
Trip Chaining	Make open rail passes easily available for long distance visitors. Disseminate information about availability of that kind of passes on rail travel dedicated sites. Make passes available online so long-distance travelers can acquire the pass while making travel arrangements	Partner with tourist organizations integrating rail passes with other tourist services, encouraging longer stays and spreading tourists along a territory. Partner with tourism distribution channels to include rail passes and information about rail attractions on tourist packages, making them easily available.
Regional Tours Base Camp	Clearly identifying routes that connect tourist attractions at stations, itineraries, ticketing systems and websites, as well as brochures, will allow tourists and rail users to discover regional destinations by rail.	Tourist trains linking well frequented attractions and/or destinations Seasonal tourist trains Themed tourist trains Day trains and or visits and activities in rail-oriented attractions.

Source: Author based on Chi-Chuan et al. 1993

7. Guidelines on how to create specifically rail-oriented tourist products

The advent of railways spread around the world in the course of the latter part of the nineteenth century and had a lasting impact in societies everywhere. Contracting time and space, allowing news, goods and people to connect with each other in a manner that was quick and reliable had a profound impact and helped create the world as it is now.

So deep was its impact that few other technical achievements since then have the same weight on the collective imagination, have the same capacity for nostalgia and sense of place that railway travel has, be it on board modern or historical, restored trains and engines.

There is a specialized market segment that is made up of what are usually called "train lovers" or "train buffs" who are, people who are passionate about everything regarding railways.

A large number of advocacy organizations focused on the preservation of railways heritage and history exist around the world and drive important numbers of aficionados that devote time and income to their passion. Their activities include restoration of tracks, engines and rolling stock, but also traveling to see and experience rail infrastructure modern or historical around the world.

In addition, as mentioned, there are even larger numbers of people who feel inspired or moved about railways as they are not by cars or airplanes, and are immediately attracted by the romantic, nostalgic connotations of a slow, leisurely, scenic and gregarious train journey.

Those people belong to the segment we have identified as "specialized rail-oriented tourists," SROT, tourists who will travel with the purpose of consuming specially designed rail- oriented or themed activities, products or services, or are likely to be enticed to do so, having already done so in the past.

They represent the main segment of consumers for dedicated rail tourist products, and also a most important source of income for organizations devoted to the advocacy and preservation of this heritage, so it is important to pay distinct attention to this type of product and its components.

The distinctive feature of specialized rail tourism products is that the railway and its heritage are a determining part of the journey: be it historic or repurposed rolling stock, antique or new engines, scenic or less-used tracks. The rail journey and the associated railway infrastructure and heritage, built or otherwise, are at the centre of the experience. Additional tourist amenities and activities are added to the product taking advantage of the rail theme.

Table 5: Disaggregated rail heritage elements that can be built into a specialized rail tourism product by attributes

Attractions	Amenities
■ Stations ■ Tracks (physical features, environmental aspects, Scenery, length, gateways, heritage, local regional economic and social features) ■ Line infrastructure (bridges, tunnels, other) ■ Rolling stock (restored, in disrepair, modern ■ Engines (restored, in disrepair, modern) ■ Workshops, tools ■ Knowledge, memory ■ Other Technical achievements ■ Written documents, pictures, video recordings ■ Immaterial culture ■ Museums, Interpretive centers, Visitor centers, rail related collections ■ Other rail heritage related attractions ■ Premium Experience Product-Pullman dining ■ Festival events	■ Multilingual tourist information and guides ■ Audio guides ■ Brochures, books, documentaries about railway history and the region tourist attractions ■ Dining car with typical cuisine ■ Outstanding service ■ Entertainment on board ■ Refreshments ■ Panorama windows ■ Observation car ■ Kids area and activities ■ Wi-Fi, bar, souvenir shop on board and at stations

Activities	Access
■ Scheduled guided tours of grounds ■ Scheduled Guided trips and journeys at stops ■ Chartered guided trips ■ Chartering or renting of infrastructure for tourist activities ■ Festivals ■ Workshops ■ Historical recreations, Steam engine training courses and certificates ■ Family friendly rail related activities and events; Shows ■ Training courses ■ Markets in railway stations or grounds ■ Visit to artisans' workshops	■ Schedules, frequencies ■ Classes: Standard, Single, Group, Discounted, Seasonal, Peak price, low-season price, different services included ■ One way or two way ■ Daily, monthly, yearly passes ■ Tourist friendly schedules ■ Connectivity to public transit systems ■ Parking areas

Awareness	Availability
■ Well connected with other local regional and national tourist attractions ■ Joint marketing campaigns to promote the destination and the rail tourism products ■ Well-known through media, website, familiarization trips for press and travel agents, activities and events ■ Public relations with community and stakeholders ■ Strong social media presence, User Generated Content ■ Present in the mind of those visiting the region/town	■ Available directly ■ Through online ticketing systems own or third parties ■ Through online travel agencies ■ Included in national and international tour operators and travel agencies packages ■ Multiple modes pf payment

Source: Author

Although it can be argued that cruise trains are a dedicated rail tourist product, they offer a mix of general tourist activities and attract wider audiences that are not necessarily mainly motivated or interested in railway heritage.

Specifically Rail-oriented tourist products cater for those tourists who travel specifically with a railway tourism motivation and are interested in railway heritage, architecture, history, technology or railway operation as an important driver for their tourist journey.

Being a relatively recent type of heritage, it is not uncommon to find Railway Heritage Preservation societies and publicly financed efforts to preserve all the heritage related with railways, be it memory, written history as well as infrastructure, rolling stock and distinct architecture that shaped the expansion of railways around the world.

In many cases public railway companies own ancient engines and historical rolling stock that has been catalogued as heritage, so must be actively preserved by law.

In other cases, these efforts are privately conducted and are struggling financially, as well as with tight safety regulations that make it difficult for restored equipment to operate.

Organizations like **FEDECRAIL**, European Federation of Museum &Tourist railways with 28 countries and 666 associated railways, or **WATTRAIN**, the World Alliance of Tourist Trams and Trains, encompass individuals and group efforts, setting up standards for repair, restoration and preservation as well as documentation of processes and technologies, best practices in operation and management of heritage railways assets, and promoting awareness amongst the general public of the historic and recreational value of this beloved heritage.

© Fedecrail

In order to provide funding for at least some of these preservation efforts, rail tourism appears to be the ideal solution for private and public companies. Rail heritage museums, as well as historical train rides are amongst the most common ways of creating value as well as educating the public about the railway heritage. In most cases, when the heritage has outstanding historical or cultural value, is located in a heavily frequented tourist area, has managed to set up partnerships with the local tourist industry with an effective marketing strategy and has sound financial resources to allow the organization to improve facilities and infrastructure for tourist use, tourism is a valid alternative to provide funding for at least the operational costs of preserving the railway heritage.

Italian State Railway Foundation is charged with the preservation of Italian state railway heritage, including two museums, historical engines and rolling stock, historical archives as well as abandoned stretches of tracks that have now come alive under the Historical Trains project. Through the Foundation's website it is possible to view the different historical railways available per region.

The National Railway Museum at Pietrarsa is one of most fascinating railway museums, placed, between Naples and Porticini, right on the first railway track built in the Italian Peninsula. Sited between the sea and the Vesuvio, with a breathtaking view of the Gulf of Naples, the

© FS

museum in unique in Italy, not only for the great historical value of the material preserved there, but also for the beauty of the venue.

© Vanessa Perez

Pietrarsa, however, is not only a place of conservation, but a cultural center with a strong link with Naples' community as well, acting as an exhibition venue and thus increasing the region's attractiveness for the Meetings and Incentives Tourism market.

Heritage Railway Association official guide offers information rates and booking details for 96 heritage railway tourist experiences across United Kingdom, including railways as well as museums, steam centers, tramways, etc. in a trade-friendly manner.

Glasgow Central Station Tours explores behind the scenes, subterranean passages and history of the Glasgow terminal, opened in 1879.

Railway preservation societies can benefit from partnering with tourism industry associates in areas that are already tourist destinations, in order to increase tourist frequentation and gaining access to wider tourist markets and larger audiences in addition to their own networks of like-minded enthusiasts. Marketing and commercialization platforms, specialist sellers, tourism boards, traditional travelogues as well as word of mouth are the main channels through which these products reach their audiences.

8. Conclusion

Rail tourism has a great potential for growth worldwide. There are major changes occurring worldwide that are currently pushing this growth: Improved technologies are allowing for more efficient rail travelling and commercialization. Liberalization of rail traffic in certain regions and major investments in others are creating new players and introducing new customers. Socio demographic changes are opening new segments of tourist demand in until now untapped tourist markets and growing ethical concerns amongst users worldwide will favor greener, more social and convenient rail travel over airlines and road transportation.

Even governments are already working on the implementation of new measures to encourage greater use of the rail network recognizing the environmental benefits of switching passengers and freight to rail.

In order to tap into this potential, rail companies are investing in upgrading rolling stock, creating new, dedicated rail tourism products and improving access of tourists and tourist companies to their inventory in order to improve sales through better booking systems and intermodality, as well as improved on board amenities.

Being aware that tourists' needs are different from those of regular railway users and acting upon those is key for rail tourism to regain its position as a sought-after way of travel. To achieve this, rail companies must become more tourist-friendly in their schedule, packaging and commercialization:

Improve the level of product **awareness amongst tourist market players and also potential customers**, including clearer visibility of tourist dedicated products on company websites landing pages.

- Enhance the **collaboration** with industry, destinations, attractions and local transportation systems.

- Efficient booking process and **door to door** ticketing, including multimodal solutions.

- Smart product development and **combination of services and destinations, including differentiation and high-end products. Make it simple and attractive, focusing on tourist highlights and attractions**.

- Developing **themed, niche and** cultural routes and products

- **Creation** of new cross border and interregional products that enlarge the scope of the region to be explored, in order to entice long haul visitors

A steady increase in awareness and interest towards rail tourism using modern railways will also benefit organizations committed to rail heritage preservation as well, helping drive new audiences in for the nostalgia. By ticking all the boxes in every XXIst century tourist wish list, rail tourism as a product is increasingly looking like a great idea whose time has finally -once again- come.

If rail and tourism companies are willing to actively cooperate, adapt and transform some of their practices to better capitalize on this renewed interest and reach out to potential tourists worldwide, rail tourism might very well be looking towards a new golden age.

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Figure

1. Five Alternative Spatial Models, Lue Chi-Chuan et al. 1993

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