

Departures

Time	Destination	Plat
13:58	Luton	
14:00		

More *Data* More *Passengers*

Driving passenger growth and revenue through open data

04	Charing Cross	9	1 min
	Dartford	6	On time
	via Bexleyheath		
05	Brighton	4	On time
06	Dartford	1	On time
	via Woolwich Arsenal		
06	Bedford	5	14:09
07	Uckfield	10	On time
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14:00:16			

14:13	Charing Cross	8	
14:14	Beckenham Jnc	-	0
	via Tulse Hill		
14:15	Dartford	6	On
	via Sidcup		
14:15	Brighton		Canc
14:16	Cambridge	5	On
14:18	Hayes (Kent)	7	On
	via Catford Bridge		
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14:00:			

Executive Summary: Unlocking *smarter rail retail* through open data

Independent rail retailers play a key role in selling billions of pounds' worth of train tickets each year and generating significant revenue for Britain's rail industry.

Third-party retailers have been the engine of online rail retail growth, investing significantly in digital platforms, journey-planning tools, marketing, and customer service. Their innovation has transformed how passengers plan and purchase rail travel, delivering convenience, confidence and choice.

Retailers make rail more attractive by continually improving the systems passengers use, centralising choice, value, and ease for every journey. Investing in modern, efficient retail systems is essential to growing passenger numbers, boosting revenue and improving the overall travel experience.

This paper calls for access to the Availability Distribution Service (ADS), also known as open data. ADS is a functionality that would accelerate passenger growth and drive more revenue for the industry. With ADS, passengers would see more journeys, more relevant options and more accurate availability, enabling smoother planning and more confident purchasing.

As the Railways Bill continues its passage through Parliament, the industry has a unique opportunity to build a more passenger-focused retail system that offers greater choice, better value, and a more intuitive experience. The Bill is an important step in shaping the future of Britain's railways, but progress should not be dependent on legislation alone. Many of the changes needed to improve the passenger experience can happen now. Ultimately, the goal is simple: put passengers at the heart of rail retail.

Unlocking ADS and investing in smarter systems will empower passengers to find the right fare and consistently make confident travel choices.

Anthony Smith
Chair
Independent Rail Retailers



Introduction



For passengers, the journey starts long before they board the train. It begins with finding the right trip, comparing fares and choosing the best option for time, convenience and cost. This early decision-making stage shapes the entire travel experience.

However, today's rail retailing system limits this experience as passengers only see a narrow slice of the journeys and fares that exist. This is not a retailer choice; it is a constraint of the current reservation system, RARS, which provides fare availability to the apps and websites that passengers rely on.

RARS only allows retailers and train operating companies to query a small number of services at a time. This directly limits how journeys, fares and combinations are presented. In practice, passengers see fewer options, fewer variations and fewer journey patterns than they would expect from a modern travel search. Compared with European rail, coach, and aviation – where consumers can instantly compare hundreds of combinations – Great British Rail is at a clear disadvantage.

ADS changes this by opening up a wider range of rail options, making it easier for passengers to find journey that suit their needs, whether that's cheaper, quieter or more convenient. By enabling smarter combinations that today's system cannot surface, we unlock greater visibility, broaden choice, and drive passenger growth and revenue.



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The case for *change*: unlocking ADS

ADS will modernise rail retailing by giving passengers access to a broader range of fares and journeys.

ADS is a functionality within RARS that enables retailers to access live fare availability in their own systems, while RARS continues to validate and complete bookings. Under the current model, every search must pass through RARS, which restricts the number of services and fares that can be shown.

The “look-to-book” limit caps how many searches can take place for each completed sale, preventing retailers from offering flexible search tools such as:

- 🔍 This weekend
- 🔍 Next 7 days
- 🔍 Next 30 days
- 🔍 “Anywhere” or “anytime”
- 🔍 Accurate price calendars

With ADS, most searches are local. This means more fares and journey options can be displayed quickly, with clearer, more consistent results. It also reduces checkout failures, as fewer requests hit the central system, lowering the chance of mismatches and improving completion rates. Additionally, reducing strain on the core system also lowers operational cost.

RARS remains the final authority at the point of purchase, validating availability before payment. Updates reach retailers within seconds, ensuring information remains accurate. Look-to-book limits become far less restrictive because most availability checks happen locally.

Unlocking ADS would greatly enhance the search experience. It is a practical, passenger-first solution that aligns the interests of operators, retailers, passengers and taxpayers. It makes rail easier to buy and more attractive to choose.

As expectations evolve, shaped by aviation, European rail and coach, Great Britain's Rail's technology must evolve too. ADS enables that shift by giving passengers a simpler, clearer, and more complete ticket-buying experience.



Making rail retailing *smarter* with ADS

Open data makes it **easier, faster and fairer** for passengers to find the right fare.

ADS reduces early drop-offs, improves trust and grows revenue without changing prices. ADS does not introduce new discounts; it simply surfaces existing ones.

1. Increased revenue and improved retailing

Independent research by Jacobs (comissioned by Independent Rail Retailers in 2025¹) estimates more than £500m per year in incremental revenue from better search, higher conversion and improved marketing enabled by real-time prices.

When passengers can quickly see the right options, including across dates or destinations, more of them complete their purchase. This directly tackles the first screen problem: Jacobs found 23% of users abandon at the first fare screen. Showing the best price over a broader period reduces this drop off and builds confidence for the passenger.

2. Consumer benefit: fairness, transparency, choice

ADS makes the search experience clearer and more intuitive. Calendar and week view searches, plus flexible “anytime/anywhere” options, help passengers match journeys to their needs, whether that’s quieter trains, better timings, or simply seeing the full range of options.

The first screen shapes the entire passenger experience. ADS ensures that the first interaction is positive: transparent results, clearer choices and a sense that rail is finally keeping pace with modern travel expectations.

3. Retail innovation: better tools for passengers

Retailers can inspire passengers by showing real availability and helping them to discover new destinations. Jacobs reveals that around 60% of people are actively seeking new places to explore by train. ADS enables the flexible (“anytime/anywhere”) search tools which are already standard in aviation and holidays enabling true price comparison services. This directly addresses trust issues as 85% of passengers say they would use a rail comparison service.

Because ADS allows most searches to be processed locally, retailers can use their own computing power to deliver faster, richer results. It also caters to new AI-powered travel assistants that can evaluate options across multiple retailers and guide passengers to the best choices. This ensures rail is embedded in the digital planning tools consumers already rely on — platforms that will only become more important over time.

23%
of users abandon at the first fare screen
(Source: Jacobs¹)

1. Jacobs Research, www.raileasy.co.uk/improving-uk-rail-fares-and-train-ticketing 2025

4. Market parity: catching up with aviation and other travel modes

RARS currently restricts search volumes through strict look-to-book caps, preventing retailers from displaying a fuller range of options or using modern retail techniques. Aviation and other travel modes already support far higher search volumes by handling most queries from local copies. Applying this model to rail would enable airline-style fare discovery while maintaining central booking safeguards.

By reducing the load on RARS, ADS lowers operating costs, potentially freeing millions of pounds in taxpayer funding that could be redirected to higher-value improvements within rail or elsewhere.

5. Technical and operational benefits

ADS reduces strain on RARS by handling most searches locally, resulting in far fewer requests hitting the central system. This lowers processing and bandwidth demands, cuts costs and delivers faster responses. It also ensures that new or growing retailers cannot overwhelm RARS.

Roles remain clear: retailers check availability locally; RARS validates and books centrally. Access is accredited, updates are near real-time, and all activity is logged, making the model controlled, secure and fully auditable.

6. Driving growth: commercial and strategic outlook

The current system relies on a single overloaded “box” and rigid look-to-book rules. As search volumes grow, whether through wider retail distribution or AI tools searching on behalf of passengers, the same problems reappear: higher costs, slower performance and declining trust.

Buying higher look-to-book ratios does not fix the underlying issue. It simply penalises retailers trying to find better options for their customers. There is also regulatory risk: when passengers cannot reliably see the full range of fares, complaints rise, and confidence erodes.

ADS provides the structural solution. Retailers search locally while RARS validates and books centrally. This stabilises performance, keeps costs predictable and ensures passengers see a fuller, clearer set of options without compromising safeguards.

Commercially, ADS increases completed sales by improving the search experience, not by changing fares. Faster, more comprehensive results convert more passengers under the same pricing rules. When all accredited retailers operate on a level playing field, competition shifts to service quality rather than who can afford more system capacity.

ADS is the structural fix that delivers better, fairer and clearer choices while maintaining all existing consumer protections.



1. Jacobs Research, www.raileasy.co.uk/improving-uk-rail-fares-and-train-ticketing 2025

Conclusion

ADS offers a simple structural improvement with far-reaching benefits. It gives passengers clearer, fairer access to fares; it reduces pressure and costs on the central system; and it creates a more open, competitive retail environment that drives innovation rather than restricts it.

Right now, we have a unique opportunity to reshape how the system operates and get it right. We can modernise the foundations of rail retailing, ensuring passengers benefit from a seamless and efficient experience from the very start of their journey search.

ADS aligns directly with the Bill's ambitions to grow revenue, including the £500m per year incremental revenue identified by Jacobs, improve efficiency and build a more passenger-focused railway. It is a low-risk, high-impact reform that complements infrastructure investment by improving the part of the railway most people use first: the retail experience. Independent Rail Retailers' members want to make this a reality.

Open data will unlock more choice for passengers, create a smarter, more customer-focused retail system, and generate millions in additional revenue for the industry.



Our *Members*

Our members are diverse in scale and focus.

assertis

Pioneers of
barcode ticketing

atomised

Employee owned
cooperative

evolvi
Rail Systems

Smart rail solutions for
business travel

FastRailTicketing

Efficient scalable
services

MyTrainTicket

Cross-selling rail
to businesses

OnTrack

Powering GB's largest
train operator

omio

International
travel experts

raileasy

Pioneers of
split ticketing

trainline

GB and international
rail specialists

Trip.com Group™

Travel experts with
global reach

Independent Rail Retailers are Britain's Rail Growth Partners –
boosting revenue, cutting costs