

THE FUTURE OF TICKETING

THE LIVE EQUATION 2030

THE RETURN ON LIVE

Fans are still showing up. What's changed is what a ticket has to earn back. Five returns now weigh on every ticket, and each one drives a force in this report.

Kantar's Global Monitor, an ongoing tracker of cultural values and attitudes across markets, calls the wider trend the Return on Me: people auditing every commitment for what it gives back. Live has its own version which we're calling the Return on Live: the multi-currency payback of social, financial, emotional, confidence and clarity that a ticket has to clear before a fan commits.

Each force is a return fans are already auditing and each chapter investigates what will pass the audit, and what won't.

The best live experiences now deliver a combination of:

- Social return through connection, community, and belonging to the cultures that matter to you
- Financial return through value that feels justified, beyond pure affordability.
- Emotional return through anticipation, excitement, joy and escape.
- Confidence return through flexibility, and the sense that saying yes stays reversible.
- Clarity return through knowing what is real, what is fair, and what is worth trusting.

DELIVER ON ALL FIVE RETURNS AND THE TICKET SELLS ITSELF. MISS ONE AND FANS START TO DO THE MATHS.

THE SOCIAL RETURN

80%

agree live events are great for bonding with friends and family. The going-together is half the purchase.

THE FINANCIAL RETURN

63%

value spending money on live experiences more than physical things. The willingness to spend is there but the price still has to justify itself.

THE EMOTIONAL RETURN

75%

agree live events feel like a form of emotional release, not just entertainment. This is a payoff fans are now banking on.

THE CONFIDENCE RETURN

79%

would rather pay more for a verified, guaranteed ticket than save money on an uncertain one. The upgrade fans value is knowing the ticket is real.

THE CLARITY RETURN

68%

say the rise of algorithms and AI is making it harder to know which recommendations to trust. Fans want the machine's help but on their own terms.

Q7_11 Live events are great for connecting and bonding with my friends or family

Q7_13 I value spending money on live experiences more than buying physical things

Q7_3 Live events feel like a form of emotional release, not just entertainment

Q7_16 I'd rather pay more for a verified/guaranteed ticket than save money on an uncertain one

Q29_3 The rise of algorithms, AI and online content is making it harder to know what recommendations to trust

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1. CULTURAL CONTEXT

**EVERY TICKET TO A LIVE EVENT
IS NOW A BID FOR SOMEONE'S
MOST VALUABLE ASSET:**

**THE ONE THING MONEY
CAN'T BUY BACK...**

BEFORE THE DATA...

**SOMETHING HAS
QUIETLY FLIPPED
IN WHAT PEOPLE
GUARD MOST
CLOSELY, AND IT'S
NO LONGER MONEY.**

In 2020, money was the resource people protected most. By 2025 it is time, and the gap is still widening. A ticket has stopped being a purely financial decision: it asks for a night from a full calendar, the energy to plan and coordinate, and the faith that the show will pay all of it back. In a world this stretched every ticket has to answer one question before anything else: what's my return on this?
WHAT'S MY RETURN ON THIS?

A ticket doesn't just ask for cash anymore; it asks for a slot in an already-full calendar, and the energy to plan and coordinate and the faith that the show will pay all of it back. People are only going to spend that **IF THE RETURN ON ME IS REAL.**

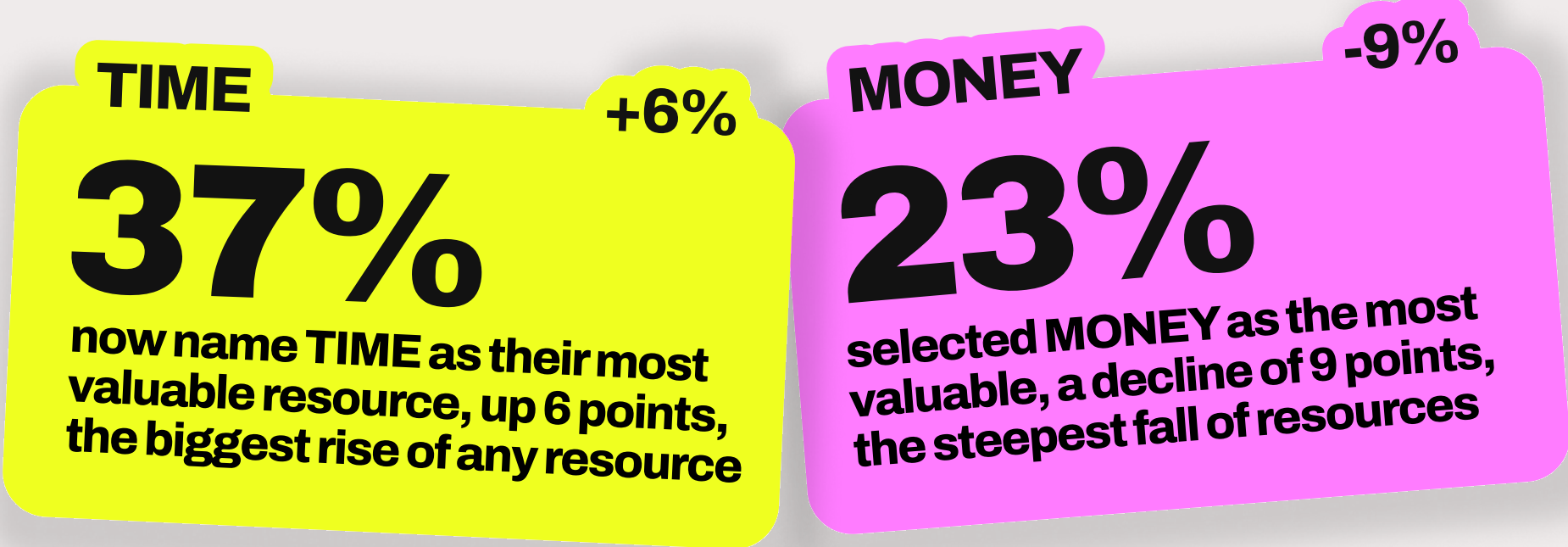
Fans arrive at every checkout with a new question:
WHAT DO I GET BACK?

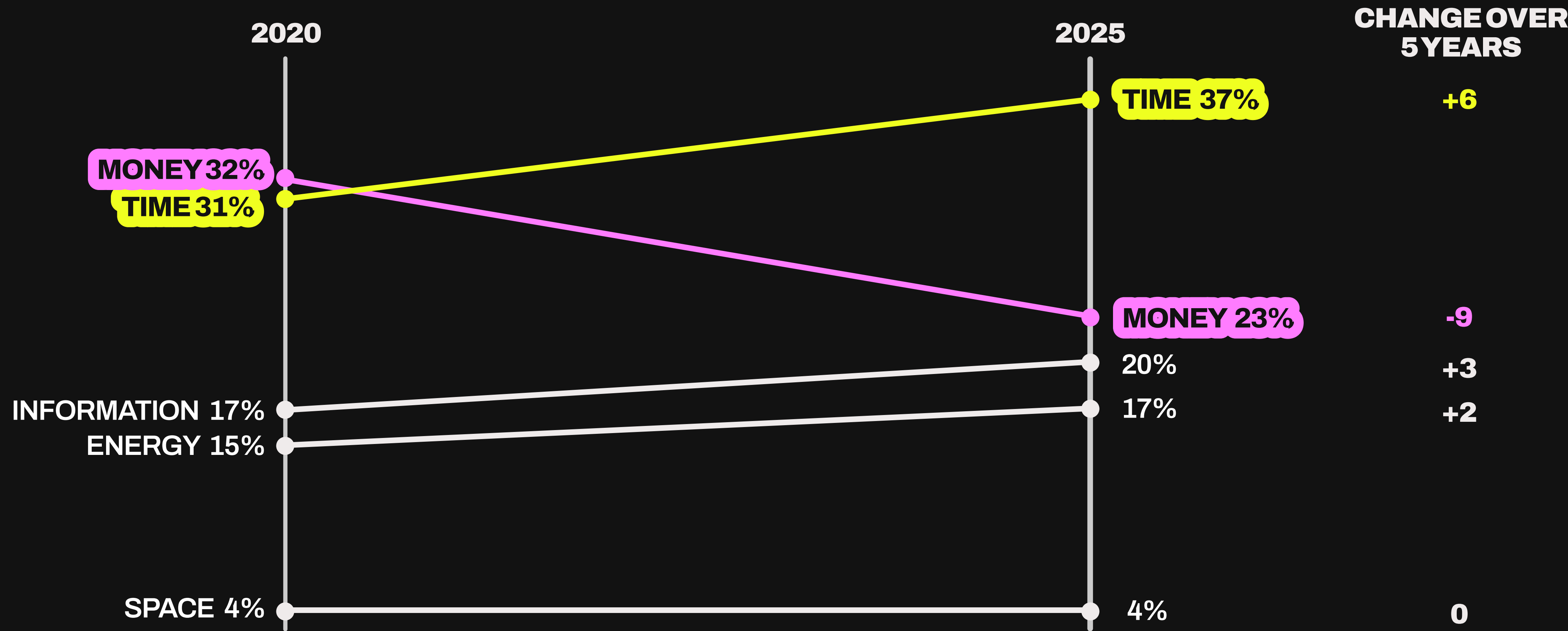
The question that this report asks next:
**WHAT DOES TICKETING HAVE TO BECOME FOR THAT
RETURN TO KEEP BEING WORTH IT?**

TIME HAS OVERTAKEN MONEY AS OUR MOST PRECIOUS RESOURCE.

Time's share has climbed six points in five years and overtaken money as the resource people protect most. Nearly two in five people (37%) name it their most valuable everyday resource.

Information and energy are also tracking upwards while money is travelling the other way, falling more steeply than any resource the tracker follows.



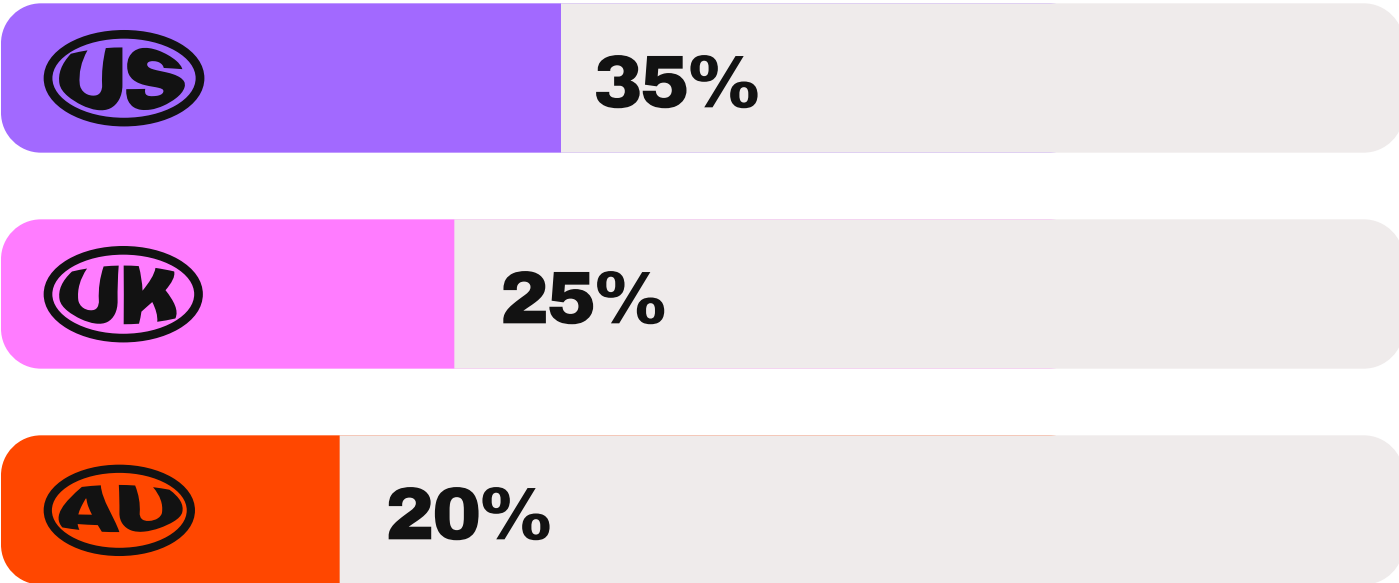


PEOPLE ARE FEELING POORER AND GUARDING THEIR TIME HARDER, YET STILL GOING OUT A LOT.

Two forces pulling in opposite directions, and every ticket bought sits between them.

Monthly attendance at ticketed events has grown steadily in every market since 2020, a period that starts in lockdown, so a large part of the rise was the world reopening. There's been steady growth in monthly attendance across regions since the post-lockdown years of 2022 and 2023, with the numbers stabilising more in the last 12 months.

MONTHLY ATTENDANCE AT TICKETED EVENTS* PER REGION



PERCENTAGE INCREASE OF FINANCIAL SECURITY AND MONEY-RELATED CONCERNS**



*Ticketed events: Concerts, sporting events, movies, museums, galleries, symphony, theatre
**Summary of financial statement changes from Kantar Global Monitor

WHAT MATTERS MOST TO PEOPLE HAS NOT CHANGED

Across the three focus markets (US, UK, AU) of this report, Global Monitor showed that honesty, balance and harmony have consistently topped people's values over the last five years.

96–99%
Being honest and trustworthy remains one of the most widely held personal values across all three markets, barely moving in five years.

95–98%
of people consistently feel the importance of seeking balance and harmony in life to feel like they are getting the most out of it. There's been little movement of this value in the last five years.

THE ROLE OF TICKETING HAS SHIFTED FROM ACCESS TO VALUE, TRUST AND EXPERIENCE

Live events remain one of the few experiences that reliably deliver emotional release, disconnection and social connection. But in a world where time, money and energy all feel stretched, attendance is no longer automatic.

Every ticket now has to earn its place.

THE QUESTION IS NO LONGER:

DO PEOPLE WANT LIVE EXPERIENCES?

THE QUESTION IS:

IS IT
WORTH MY
TIME?

IS IT
WORTH MY
MONEY?

IS IT
WORTH MY
EFFORT?

WILL I GET
SOMETHING
MEANINGFUL
BACK?

The five forces that follow are not separate trends. Each one is a return under pressure, and that is the Return on Live.

FIVE FORCES SHAPING THE NEXT ERA OF LIVE



Demand isn't the problem. Fans still show up, and they will still pay. What's changed is that they want proof before they commit, and these five forces are where that proof is being demanded.

FORCE #1 BETTER TOGETHER

The purchase decision is now a group decision. 27% of Gen Z won't commit to a ticket until a friend does, against 18% of everyone over 30, and belonging is what brings them back: 71% say live events help them connect with like-minded people. The group is the unit of demand, and almost no checkout is built for it.

FORCE #2 ELEVATED EXPERIENCE

Expectations are rising, not falling. 70% say production, atmosphere and the overall experience matter more to them than they used to, and fans are now judging the whole night rather than the ticket, from travel and extras to what happens once they are inside. They will pay more when the return is visible, and walk away when it isn't. The experience has to prove itself.

FORCE #3 THE HAPPINESS SHORTCUT

Live has become emotional infrastructure, not an occasional treat. 75% call it a form of emotional release and 73% say it helps them disconnect. Both of these data points run highest in the US and UK, and lowest in Australia.

FORCE #4 THE CERTAINTY PREMIUM

Premium has been redefined. It isn't just better seats anymore, it's certainty: that the ticket is real, that the price is fair, and that the plan can change. 79% would rather pay more for a verified, guaranteed ticket than save money on an uncertain one, and 82% say platforms will need stronger rules to stay fair. Confidence is what fans are now willing to pay for.

FORCE #5 LIVING IN THE ALGORITHM AGE

Algorithms shape what fans see but not what they trust. 68% say the rise of algorithms and AI is making it harder to know which recommendations to trust, and only 6% trust AI when deciding whether to attend, against 42% who trust friends and family. Winning the next era means making smart feel trustworthy, not just smart

METHODOLOGY

This is a portrait of the whole market, not just the people already deep inside it.

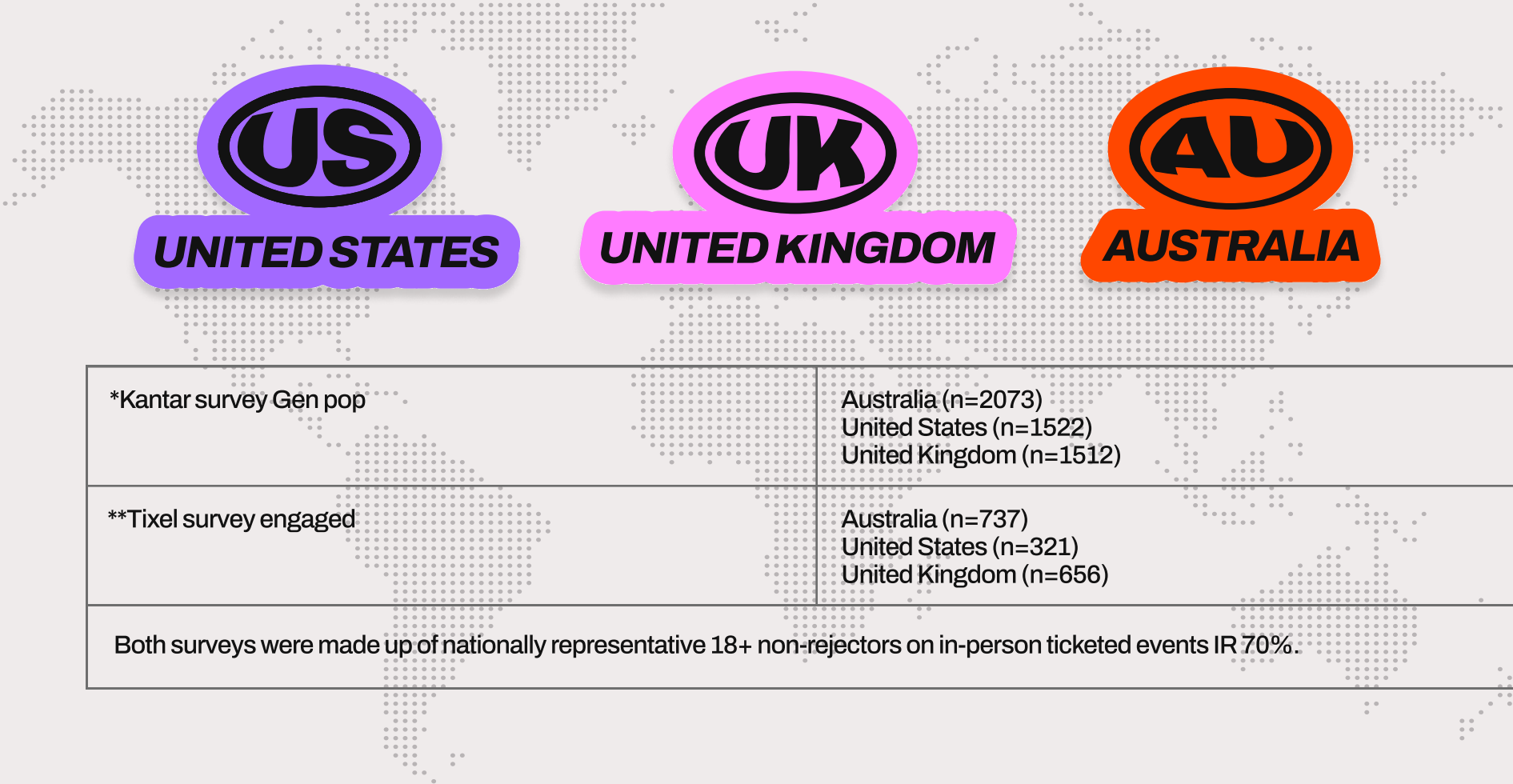
In mid-2026 we surveyed 5,107* people across Australia, the UK and the US: a general-population sample of fans who, in the past 12 months, attended a ticketed live event, bought a ticket to one, or tried to go and couldn't. Their answers are the core of this report.

We also surveyed 1,714** Tixel customers in the same three markets, asked the same questions, to see how a resale-engaged audience differs in its views. The two data samples were never combined. The main numbers you see in this report come from the general-population sample only and anywhere the Tixel customer panel is referred to, it appears in a clearly badged side-note.

Two notes for the careful reader. Percentages are shown as whole numbers. Generations are approximated from age bands:



We close out the report with three regional deep dives into Australia, the UK and the US, that help us understand the nuances of these markets.



2. THE FIVE GLOBAL FORCES

FORCE #1 BETTER TOGETHER

The cultural shift underpinning this force is simple:
GOING OUT IS A GROUP DECISION BEFORE IT IS A PURCHASE.

Even as broader social trends point toward isolation, live events are one of the places where the opposite is happening. Someone floats the idea, everyone waits to see who else is in, the group chat does the chasing, and one person pays for all of it. Fans are coordinating more than they did a few years ago.

The group has always decided. What is changing is how much it decides and the gap is widest with the youngest fans, the ones with the most ticket-buying years ahead of them. Ticketing is built for one person with one card. And whether it's a group of friends, sports fans, or the crew you go to musical theatre with, this chapter argues the unit of demand is the group.

The group's role doesn't close at the gate either. **VALUE IS INCREASINGLY CREATED IN THE SHARED EXPERIENCE AND THE COMMUNITY AROUND THE EVENT, AND WHAT BRINGS FANS BACK IS OFTEN THE PEOPLE THEY WENT WITH.**

THE SHIFT

Life moved onto screens.
Live is where people deliberately go
back to sharing something in person.

THE FORCE

Better Together: The distance
between how groups decide and how
checkouts are built. Who invites, who
commits, who coordinates, who pays.

UNIVERSAL NOW, AND EXPECTED TO GROW

Life already moved onto screens. The new part is a correction, of sorts, as people consciously buy their way back to each other. And live events are where they do it.

People are buying time together as much as they're buying access to an event. This is where "return on live" and "better together" line up: the personal reward and the shared occasion are the same purchase.

The data is not niche. It holds within a few points across every market. The one real movement is generational: belief that live will matter more for social connection runs 14 points higher among Millennials than among the over-60s, where it drops to 64%.

The power to connect is close to universal, making it the ground everything else in this force is built on. And the interesting questions are not whether people value going together, but how the going-together actually happens.

80%

say live events are great
for bonding with friends
and family

73%

believe live events will matter
more for social connection
and wellbeing as life gets
more digital

78%

say people will increasingly
value real-life experiences
over digital ones.

69%

expect people to make a
conscious effort to reconnect
in person as lifestyles digitise

Q7_11 / Q8a_1 / Q8a_2 / Q8a_5. Agreement statements on bonding, social connection and consciously reconnecting in person.

(RE)INTRODUCING: THE INSTIGATOR

Behind every group at the gate is usually one person who made it happen. We call them the Instigator: 22% of people play the role, and another 20% are waiting for someone to play it.

Those in the industry know the value of the person that rallies the group but it's interesting to dig more into how many fans identify with this role, how many depend on it, and what it might cost when nobody takes it on.

tixel **PANEL**

Tixel customers play the Instigator at close to double the market rate (38% vs 22%), and inside the panel the role holds flat across generations rather than peaking with Millennials.

22% PRESENT AS THE INSTIGATOR: THEY ROUND THE GROUP UP AND PAY. Another 10% are The Convincer, buying a spare then talking someone into coming. Count everyone who does either and around one third of fans are the reason the group gets there at all. One in five are The Follower (20%), waiting on someone else to commit first, and 11% co-plan but never touch the checkout. 7% didn't go, because nobody else was interested.

THAT 7% LOST-TO-FRICTION GROUP DESERVES A LOOK. At the scale of live entertainment, "nobody else wanted to come" is a measurable, addressable slice of lost revenue, that can be classified as a coordination failure. The demand was there but the group never formed. There's an opportunity here: the industry may already know the importance of the Instigator, but perhaps there's ways to help them do their job better.

We'll come back to the secondary market later, but group buying can be capped before the onsale even opens. Those caps are built to protect fans from brokers, and they apply to a group of friends in exactly the same way.

Artist manager Jodie Regan of Spinning Top Music, whose artist roster includes Tame Impala, Pond, Automatic and Whitney, said **"One of the first things our agent or promoter asks before a show goes on sale is what the ticket limit is going to be. We can't allow more than four or six, because then we think they're going to sell them. So much of what we put in place on an onsale is about stopping people buying tickets to scalp them and rip fans off."**

% of fans who played each group role at their last ticketed event



Q6. "...which of the following describe how you approached the decision to buy tickets?"
*The numbers don't add up to 100 as the question was multi-select

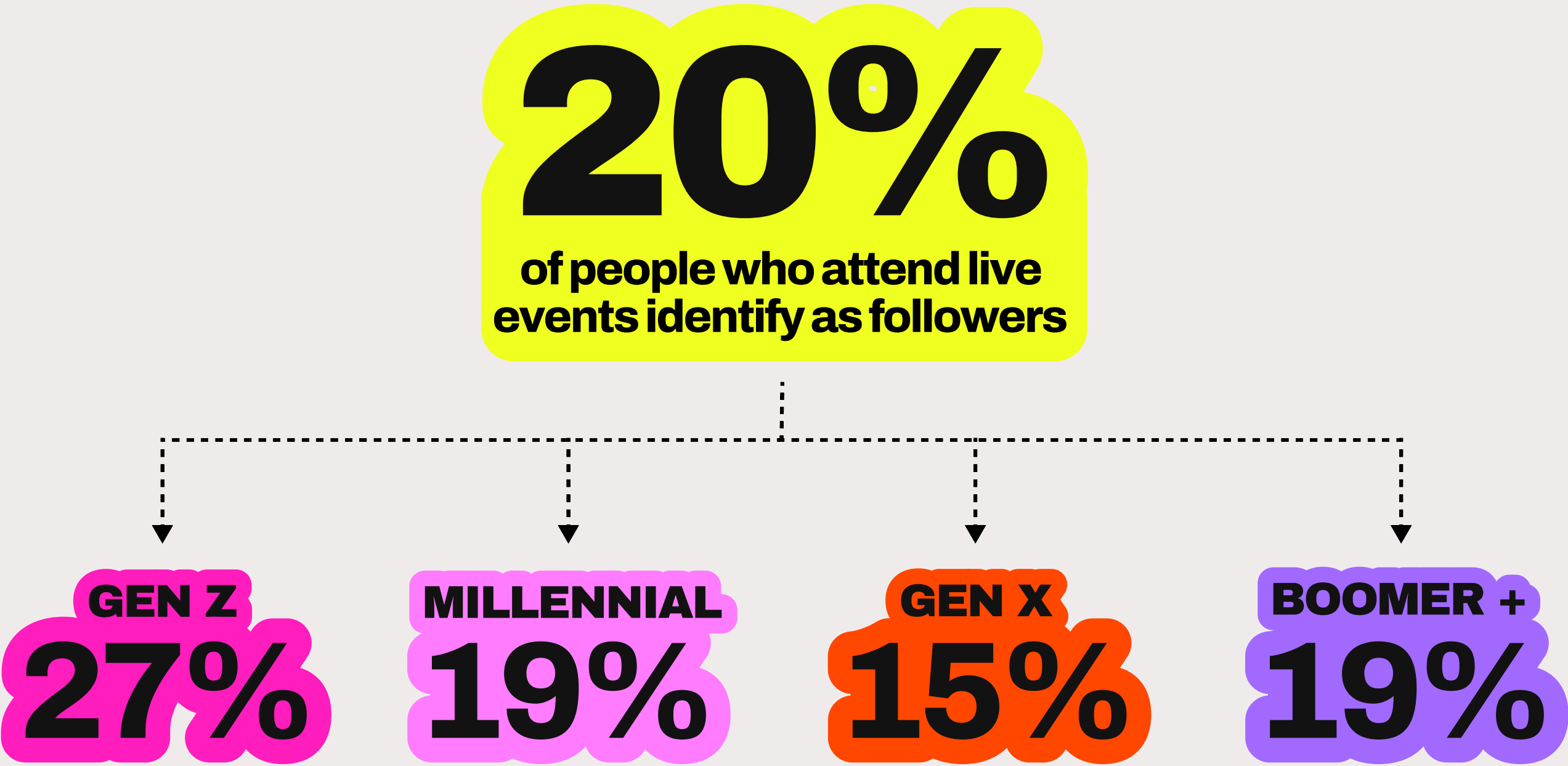
WAITING IS NOT THE SAME AS NOT WANTING

One in five fans won't buy until someone else does, and Gen Z waits more than anyone.

20% of fans needed at least one friend to commit before they would buy. Gen Z sits at 27%, ahead of every other generation, and it isn't a linear slope: Boomer+ waits more than Gen X does.

The instinct is to read waiting as lukewarm interest but fans who gave an explanation for this described aligning calendars and confirming friends are going, alongside the budget check.

THE FOLLOWER ISN'T A WEAKER BUYER. THEY'RE A BUYER WITH A DEPENDENCY, AND THE DEPENDENCY IS ADDRESSABLE.



Q12b Why do you usually buy tickets at that stage?

I wait to confirm my schedule with friends and check my budget before purchasing.

FAN, AUSTRALIA, 24

Because I need to check my schedule and be sure I'll be attending with a friend

FAN, UK, 22

**Everyone is buying the same ticket.
Under-45s are expecting more meaning from it,
and they're the buyers who are inheriting the market.**

LIVE EVENTS...

UNDER 45

OVER 45

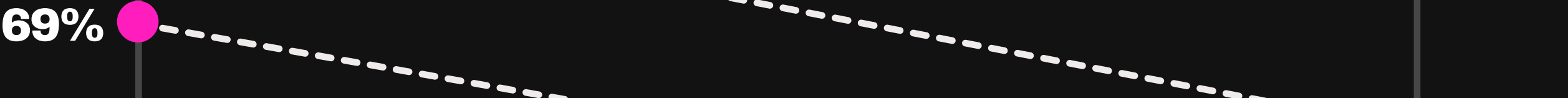
...are great for bonding and connecting with family members



...are becoming something people actively participate in, not just watch



...feel like once-in-a-lifetime cultural moments people plan their years around



...are expected to stand for something not just stage performances



WE ALL BOND BY GOING OUT, BUT YOUNGER FANS EXPECT MORE FROM THEIR NIGHT OUT

All fans agree that live is about being with people, but those under 45 attach more meaning on top of that, by around ten points on every measure.

Connecting with friends and family at live events is close to universal, and the two halves of the market sit around 80% on it, just three points apart. That is the floor this force stands on, and it isn't moving

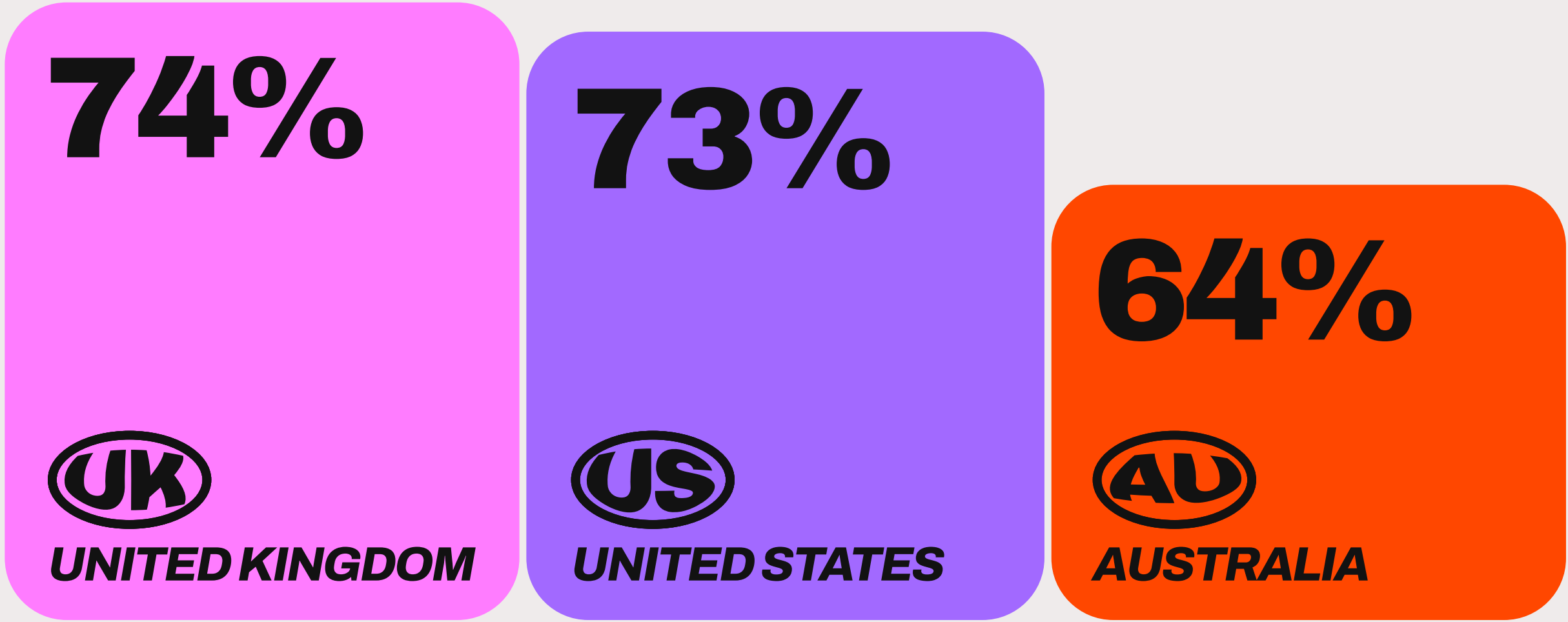
Above that floor those under and over 45 start to separate when it comes to expectations connected to meaning. Younger fans are more likely to want to partake rather than just watch (+11pt), to treat a show as a fixture they plan their year around (+9pts), and to expect it to stand for something beyond the performance (+11pts). Nine to eleven points ahead on each measure is a meaningful difference.

The half asking for more is the half that will be buying for the next twenty five years and it's worth figuring out how you build the night for them.

BELONGING, BY MARKET

Belonging is not evenly distributed across the three markets.

64% of Australia's general public say live events help them connect with like-minded people, the lowest of the three markets. The US sits at 73% and the UK is the highest on this measure at 74%.



THE SOCIAL JOURNEY CONTINUES EVEN AFTER PURCHASE

The group decides when the ticket gets bought, and whether it survives.

30%

of people who have sold a ticket did so because a friend or family member dropped out or they didn't want to go alone.

This is on par with the other biggest reason people sell, their own plans changing, at 32%.

So a ticket is about as likely to move because of someone else's life as the buyer's own, and the ability to recoup the money for any unwanted tickets holds a group's confidence to buy and commit as a group.

THE EASIER IT IS FOR GROUPS TO ADAPT, THE EASIER IT BECOMES FOR PEOPLE TO COMMIT IN THE FIRST PLACE.

Q18, base 3,312 fans who have sold a ticket.

Why do you buy tickets early?*

Half of all fans have children at home, and among Millennials, a core ticket buying generation, it's two thirds. Parental households hold a lot of ticket volume.

"Gives more time to organise the plans for the day and whose going etc"

UK, MALE, 28

"Then I definitely have confirmation I am going and have plenty of time to organise time off, accommodation."

AU, FEMALE, 18

"To secure good seats early, ensure availability and coordinate plans with family and friends."

US, MALE, 40

"I organise friends that want to go so we can sit together."

UK, MALE, 71

"Better generally for timing and organising schedules for groups of people to go together."

AU, MALE, 38

*QN: Why respondents buy tickets early

THE GROUP OPENS THE DOOR

Discovery still runs through people more than platforms. The group opens the door; the line-up and the price close the sale.

Friends and family remain the single biggest way fans hear about a live event (49%) and the second most trusted source when deciding whether to attend (42%), just behind the trust placed in event and ticketing platforms (47%).

Every paid channel, every algorithmic feed, every creator partnership sits behind good old-fashioned word of mouth as a way of finding out.

Nicholas Greco of Untitled Group added: **"Audiences aren't very forgiving. If they think your line-up's mid, you'll know about it on social media within seconds. You're answering to your audience on line-up day, immediately. They're judging your homework as soon as it's out, and if you haven't done a great job you'll hear about it loudly."**

Closing the sale is a different job. Asked to rank the main reasons for buying, fans put the line-up first (41% rank it top), then price (15%); "friends attending" is the first-choice reason for just 8% but it's in the top three for 30%. That may seem like a contradiction but you can think of it more as a funnel: the group gets a fan considering a show and shapes whether the night happens at all, but the artist and the price close the transaction.

Search engines, reviews and media coverage, online communities and social creators all contribute trust in the decision too, but they carry less weight, and AI carries least of all.

49%

Hear about events from friends & family

42%

Trust friend & family recommendations when deciding

**DISCOVERY AND TRUST ARE WHERE
THE GROUP DOES ITS REAL WORK.**

Q4. "How do you typically find out about live events?"

Q28. "...which of the following do you trust the most?"

Q5. Reasons to buy, ranked 1 to 8; figures are the share ranking each reason first.

SIX STEPS, BUILT MOSTLY FOR TWO OF THEM

The ticket is one step. The journey is six, and ticketing is engineered for just two of them.

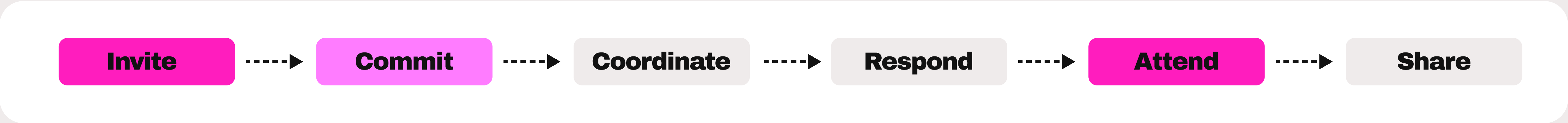
The majority of fans say that in future, buying a ticket will feel like the beginning of the experience. Yet much of ticketing is built as though it's the end.

Ticketing was designed as a transaction, so it got very good at the two moments when the transaction matters most: the onsale, which serves Invite, and the gate, which serves Attend.

57%
say buying a ticket will feel like the beginning of the experience rather than just a transaction

Both are engineered down to the second and neither lasts longer than a few minutes. The parts that take a fan months are the deciding, the organising, the re-planning in response to life's curveballs, and the re-living. None of that is really part of it.

The group's work happens in the steps that no single platform owns and there's an opportunity for those who think about the part they can play across the full journey.



A photograph of three young women at a concert. The woman in the center is wearing a blue lace crop top and has her arms raised, smiling with her eyes closed. The woman on the left is wearing a maroon top and is also smiling. The woman on the right is wearing a striped shirt and has her hand near her face. The background is dark with some stage lights.

**GROUP DYNAMICS RUN THE
LENGTH OF THE JOURNEY:
WHETHER INTEREST BECOMES
— PLANS, PLANS BECOME —
PURCHASES, AND PURCHASES
BECOME SHARED EXPERIENCES.**

WHERE THIS GOES NEXT: THE 2030 LENS

Ticketing counts buyers but demand arrives in groups. And as fans say yes to less, shared occasions are more likely to make the cut.

The arithmetic is already settled. The generation least willing to buy alone becomes the default buyer inside the decade. Whether the reliance on friends is a life stage people grow out of or a habit they keep is an open question, and also the least important one: either way, a rising share of every sale sits behind whether a group forms.

Discovery is moving the same way. Community is becoming the layer this market runs on, ahead of the creator economy and, for the youngest fans, ahead of search itself. The place fans decide is increasingly the place they already belong.

Put those together and the shared cart, the held seat, the visible friend and the easy exit stop being features somewhere in the early 2030s. They become the default architecture of a checkout. The platforms that build them first will convert the demand everyone else keeps losing at the group stage.

THE FORCE IN ONE LINE: TICKETING COUNTS BUYERS BUT DEMAND ARRIVES IN GROUPS. WHOEVER CLOSES THAT GAP FIRST OWNS THE NEXT DECADE OF IT.

FORCE #2 ELEVATED EXPERIENCE

Expectations are rising and budgets are tightening at the same time. That gap is the force.

Fans haven't retreated from wanting better, more elevated experiences. They still want memorable nights, premium moments and things worth talking about the next day. What's changed is that they're paying more for them and are pickier about what earns their time, so the bar the night has to clear has gone up from both directions at once.

This chapter reframes what premium means for the next era. It has stopped being a better seat and become a judgement about the whole occasion, one that has to visibly balance before a fan will buy. Fans are still willing to spend. What has changed is that the spending goes through a finer filter now.

THE SHIFT

Everything grew a premium tier and people got used to wanting it. Live is one of the few things they haven't traded down on.

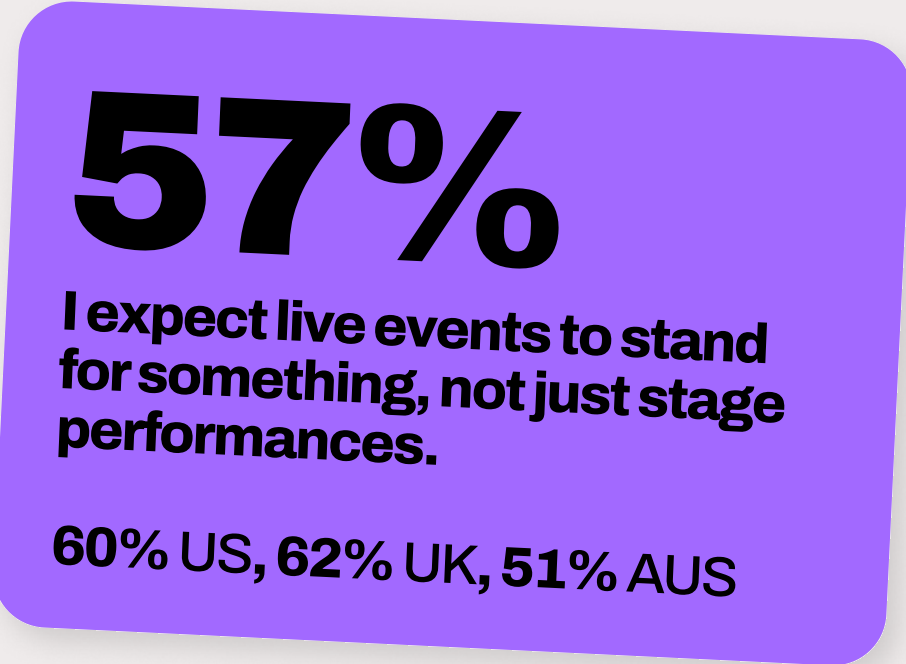
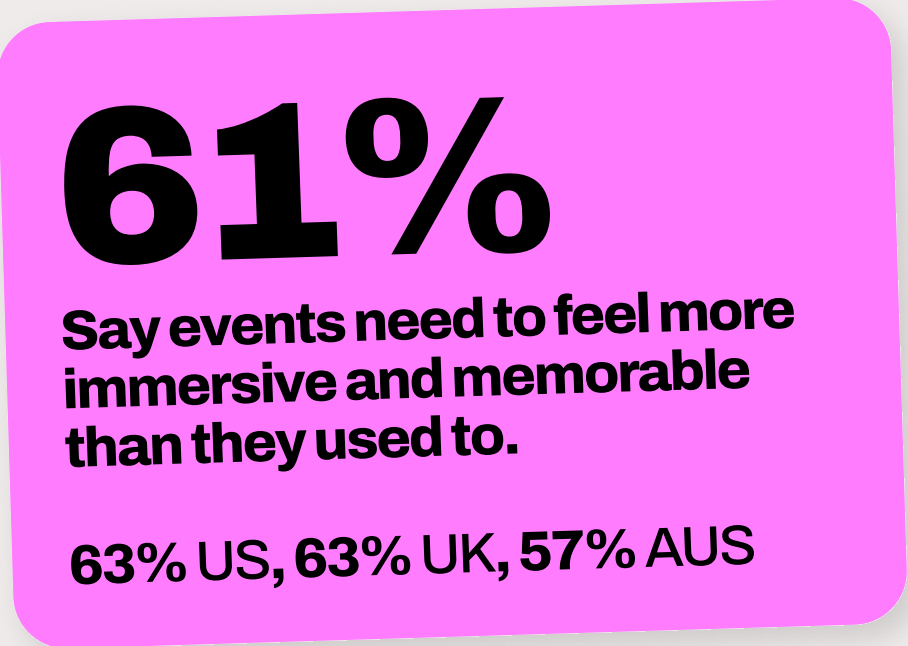
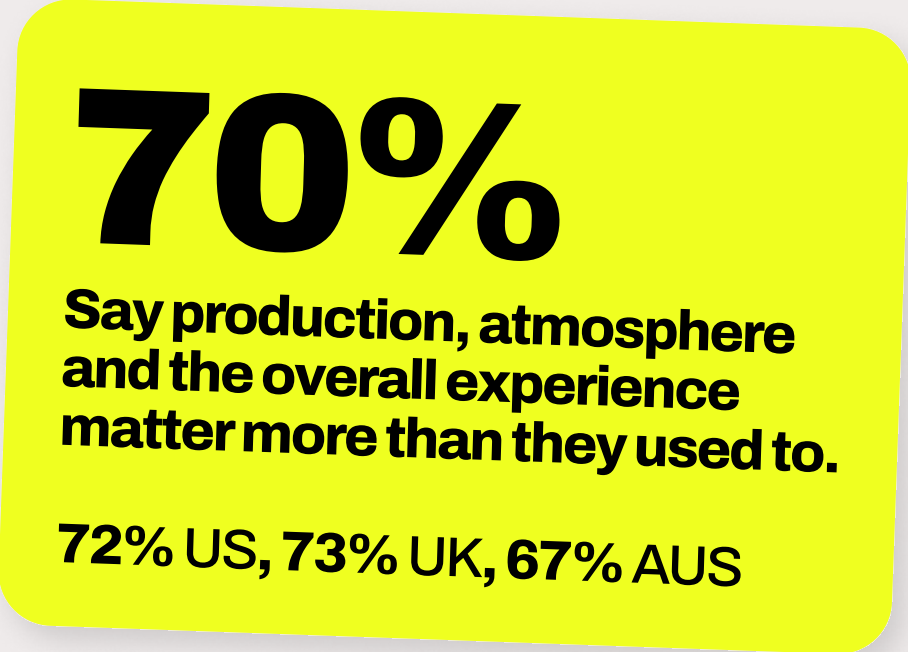
THE FORCE

Elevated experience is the distance between rising expectations and tightening budgets. Premium stopped being a better seat and became a judgement about the whole night.

ELEVATED EXPECTATIONS ARE NOT CONFINED TO THE PEOPLE IN THE FRONT ROW

“Premium” has historically meant VIP seating and better sightlines. Fans are describing something broader now, a psychological equation that has to visibly balance before they'll trade up. As they become more selective with time and money, the standard for value is rising; production, atmosphere and memorability have to work together to make the price feel justified.

Artist manager Jodie Regan of Spinning Top Music, whose artist roster includes Tame Impala, Pond, Automatic and Whitney, said **"We keep our ticket prices as low as we possibly can, but the show we want to put on sets the price. Generally speaking, if you want people to buy a more expensive ticket you have to put on a more expensive show."**



AS PRICES RISE, THE EXPERIENCE HAS TO WORK HARDER, BUT THE NEW DEFINITION OF PREMIUM IS BROADER THAN JUST VIP.

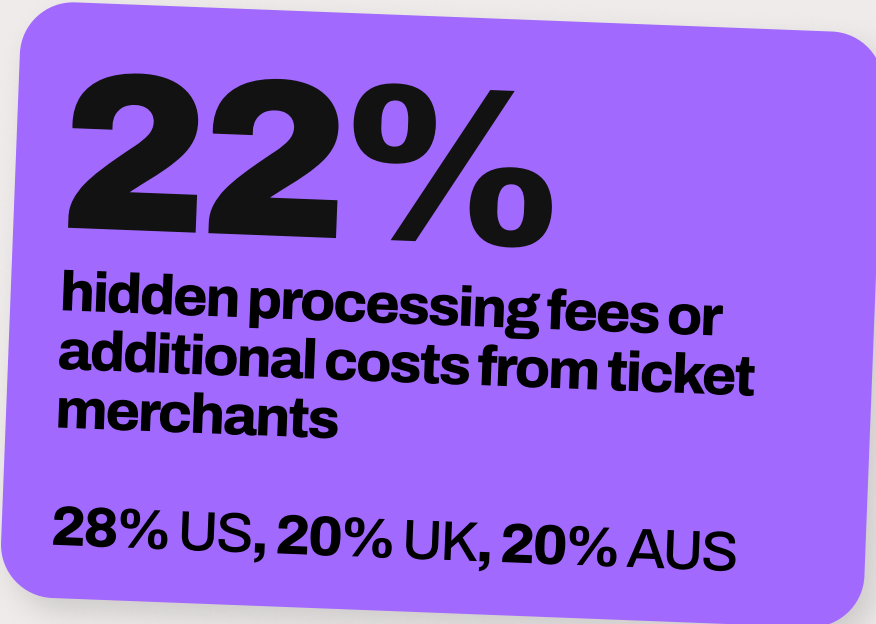
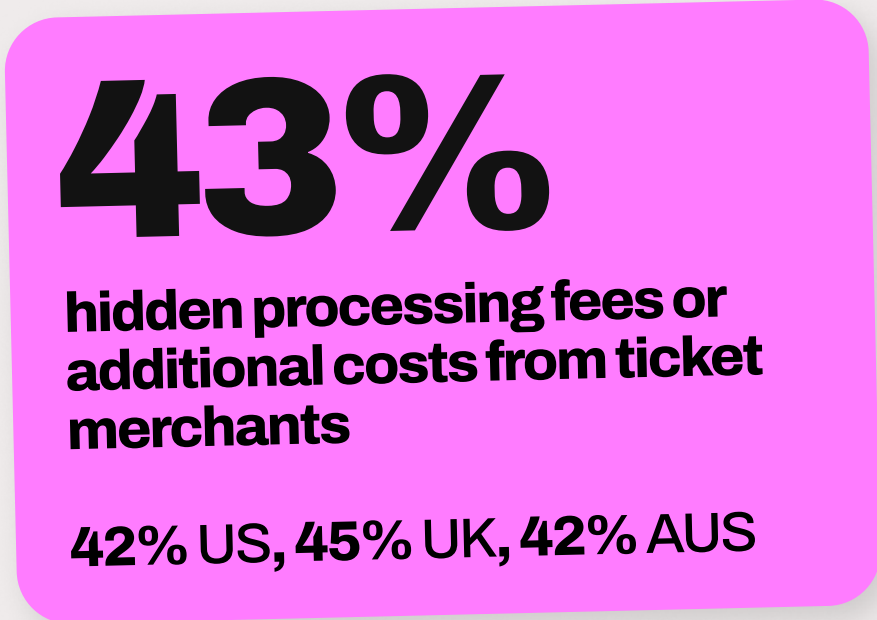
Q7. Please indicate how much you agree or disagree with the following statements about live events (e.g. concerts, festivals, sports, theatre)

BUT TICKET PRICE IS ONLY PART OF THE EQUATION

Affordability is shaped by the whole cost of attendance

Fans assess affordability across the entire experience, not just the ticket price at checkout. Travel (43%), the additional costs of attending (33%) and hidden processing fees (23%) are barriers that can each turn initial interest into something unaffordable, since this is as much about value perception as raw cost. Cost pressure is particularly high in Australia, where nearly seven in ten identify ticket price as a barrier.

Niamh Byrne, artist manager and Chair of the UK's Music Managers Forum added **"We're having to adjust our ticket prices to compensate for the extra charges, so that when the total price is presented to a fan it isn't seemingly extortionate, even though we don't have any control over that. We're still making decisions to make sure we protect fans and it isn't beyond their reach."**



CONSIDER THE WHOLE COST OF ATTENDANCE, NOT TICKET FACE VALUE ALONE. BE TRANSPARENT ABOUT ANY ADDITIONAL PROCESSING FEES THAT ARE NOT APPARENT UPFRONT.

Q8. What stops you from buying tickets to events?

RAISING THE BAR WITHOUT RAISING THE BARRIER

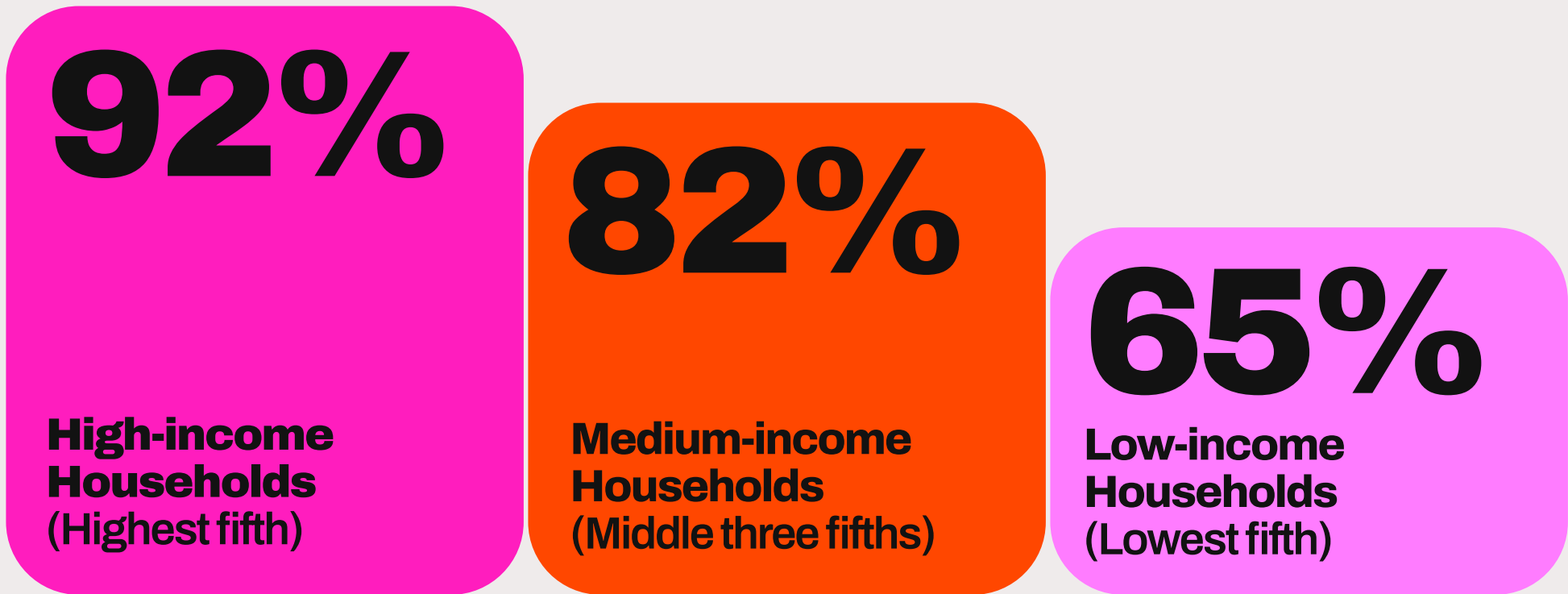
It's not surprising that higher-income households attend live experiences more but lower income households are still going out at a significant rate: two thirds of lower-income households have purchased a ticket or attended an event in the past 12 months.

Appetite doesn't collapse under financial pressure, and expectations remain largely the same. While those in lower income households are 27 percentage points less likely to have attended a live event, they weigh what makes a live experience worth it as heavily as higher income households do.

The challenge is building experiences that preserve access (affordable luxury) while making quality, choice and value visible at every tier, not just the top one.

Randy Nichols, strategic advisor, artist manager and policy advocate in the US said: "Arena and stadium level concerts are now like Broadway shows. They're not an artist on stage. There's full production. There's major set changes, and the ticket price is supporting all this, and the fans want to see it. So they're coming back and sharing it on social media and creating these hugely successful tours. But the worry is how far can you push these limits?"

% WHO PURCHASED OR ATTENDED A LIVE EVENT IN THE PAST 12 MONTHS



DESIGN ELEVATED EXPERIENCE INTO EVERY TIER, NOT JUST THE HIGHEST-PRICED TICKET.

S5. Thinking about ticketed, in-person live events (e.g. concerts, festivals, sporting events, theatre or comedy shows), which of the following describes you in the past 12 months?
Q7. Please indicate how much you agree or disagree with the following statements about live events. Income groups are fifths of household income within each market. Expectation comparison is adjusted for each respondent's overall agreement level across the Q7 statements.

THERE ARE CONTRADICTIONS IN HOW WE ASSESS OUR PURCHASES

There's some natural tensions at play when it comes to buying behaviour."

Fans are applying two tests that pull against each other. Half cite an affordable price as a leading reason to attend, four in ten cite value for money.

50%

Identify an affordable price as a leading reason to attend.

53% US, 48% UK, 51% AUS

40%

Identify value for money as a leading reason to attend.

41% US, 39% UK, 44% AUS

One asks what it costs, the other asks what it returns, and a cheap ticket to a disappointing night fails the second. That tension is what shows up when the price lands higher than expected.

When faced with a much higher-than-anticipated price not all of us just walk away. And the response isn't uniform — age matters more here than geography. 19% of Gen Z would walk away, against 56% of over-60s.

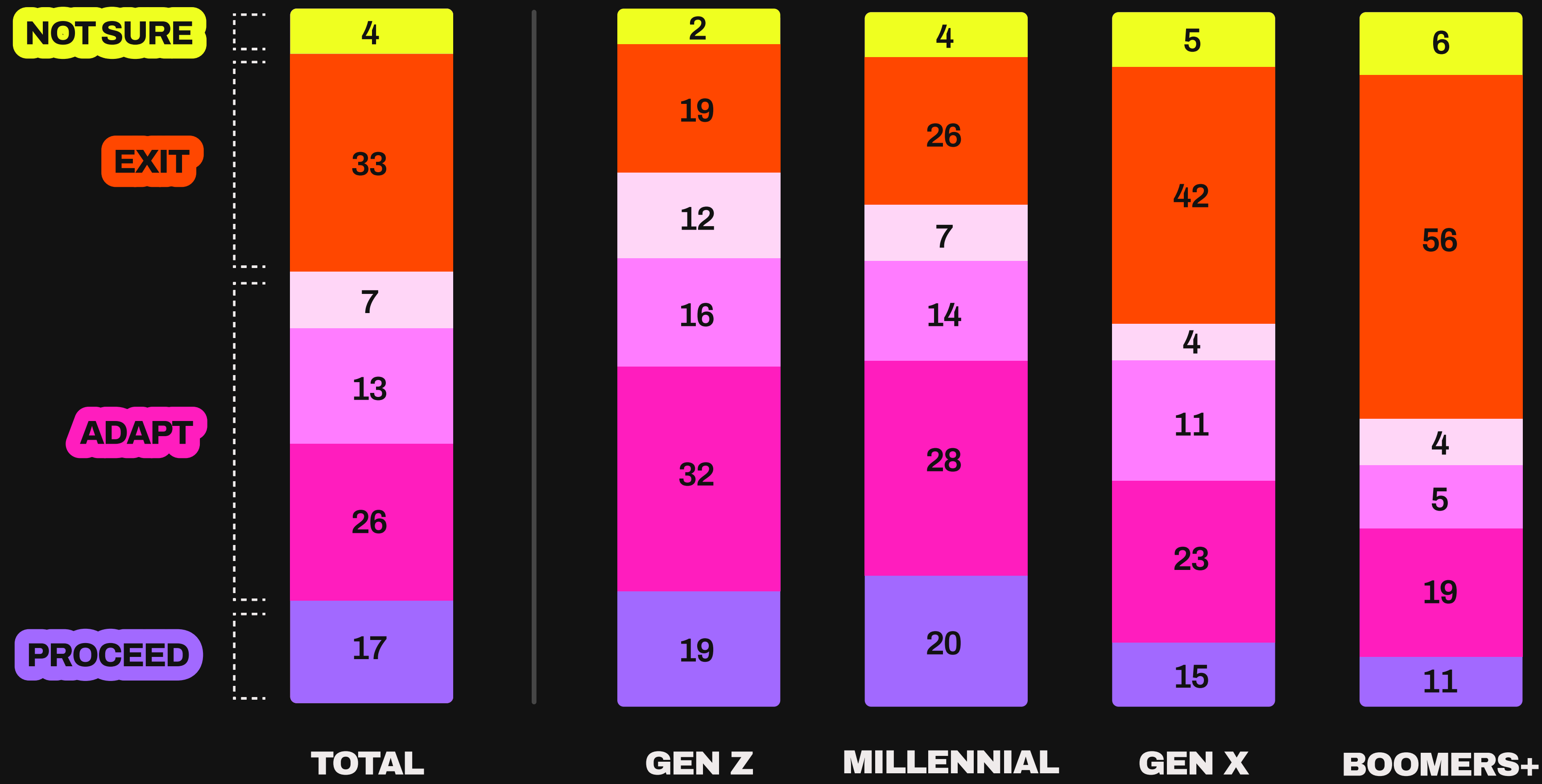
Gen X and Boomers+ are significantly more likely to simply walk away from the purchase (42% and 56%), those under 45 are far more likely to find a way to make it work (Only 19% of Gen Z would not attend, Millennials, 26%). If your event skews 45+, try to be as upfront as you can about pricing to avoid a "principle exit" over the end cost. If it skews under 45, there's more room to communicate price progressively.

Q5. What are the reasons you choose to buy tickets to live events?

Q9. Imagine tickets for an artist you really want to see are more expensive than expected (e.g. you expect \$/£200 but they are \$/£350). What would you be most likely to do?

Adapt*: 1) I would try to find a way to make it affordable 2) Use a payment option to afford the ticket 3) Save up and try for a resale ticket later

What would we do if the ticket was way more expensive than we were expecting



WHERE THIS GOES NEXT: THE 2030 LENS

Make “worth it” felt. Fans need to envision the return before they commit.

Perceived quality, total cost and what's included have to work together to make the price feel justified. As spending becomes more considered, events have to demonstrate what the extra actually buys.

When people look ahead, the expectations climb again. They expect live events to be emotional journeys, once-in-a-lifetime cultural moments, something to participate in rather than watch.

They expect buying tickets to feel like the beginning of the experience, not just a transaction, and they want more from a show than an artist simply playing songs.

Ask what would make someone buy earlier and lower prices leads, which shows where the pressure sits rather than what to do about it. Better seats or viewing areas comes next, while exclusive perks, the classic premium product, sit near the bottom. Certainty-drivers do a lot of work here, from guaranteed access before general sale, to avoiding fear of selling out (FOSO), and the ability to refund or sell a ticket if plans change. We'll talk about them more in Force 4: The Certainty Premium.

**THE FORCE IN ONE LINE: WHEN THE EQUATION DOES
BALANCE, WHAT FANS ARE PAYING FOR IS THE FEELING
THE NIGHT GIVES BACK. THAT IS WHERE THIS GOES NEXT.**

Q14. What would make you more likely to buy tickets earlier than you usually do?

FORCE #3 THE HAPPINESS SHORTCUT

This is the emotional return, and it's the one fans are least willing to give up. Live delivers release and distance from the everyday, and it delivers both to a large majority of people.

THE RETURN ON ME trend runs the same way outside live: people are auditing what their commitments give back, and joy is a return they don't want to drop.

This next chapter explores how the next phase of growth could belong to the events that add more moments worth anticipating.

THE SHIFT

People started auditing what their commitments give back. Live is one of the few that pays before the day arrives.

THE FORCE

The Happiness Shortcut: The distance between the night the industry sells and the return fans are already counting. The anticipation, the release, the retelling.

“SOMETHING TO LOOK FORWARD TO, SOMETHING TO ENJOY IN THE MOMENT VISCERALLY, AND SOMETHING TO REFLECT BACK ON.”

AUSTRALIAN FAN, 48

ONE PURCHASE, THREE PAYBACK MOMENTS

Happiness is hard to schedule. A ticket is one of the few things you can buy that starts paying out the moment you pay for it, months ahead, on a date you choose. That's the shortcut, and most of it happens nowhere near the venue: the night is fixed in cost and capacity, while the months either side cost almost nothing to feed.

THE ANTICIPATION

Fans describe the purchase as the moment the plan becomes real. This is also when the conversation and hype starts, with over half of us (52%) saying it's often as enjoyable as the event itself.

The purchase is the moment a plan stops being an idea. The payout starts there, months before the doors open.

THE EVENT

Around 3 in 4 of fans feel live events are an important way for them to genuinely disconnect from everyday life, a form of emotional release, and a break from algorithms, automation and digital overload.

This is the part the industry sells, and it delivers release and distance from the everyday, for a large majority.

THE RE-LIVING

64% of fans say live events give them moments worth sharing online. The night keeps working afterwards, in the group chat, the camera roll and the feed.

Q7. Please indicate how much you agree or disagree with the following statements about live events (e.g. concerts, festivals, sports, theatre)
Q29. Looking ahead, how much do you agree or disagree with the following statements about the future of technology and live events?
Q12b. Why do you usually buy tickets at that stage?

FOR PARENTAL HOUSEHOLDS, LIVE IS A PROTECTED FIXTURE

Half the fans we surveyed have children at home, rising to two thirds among Millennials. Often, for parents, happiness has to be scheduled and that changes what a ticket is for.

A quarter of fans with children at home name childcare or family duties as a reason they don't buy, against 5% of everyone else. This gap stays the same no matter how much money parents make, suggesting the problem is more about caring responsibilities than income.

For the most part they look like any other fan, naming price, travel and work at roughly the same rate as everyone else. Everyone wants the ticket to be cheaper. This half needs the night to be possible.

Which is why the ticket does more work here than anywhere else: it solves for a date night and turns a joyful intention into an arrangement. 60% call live a regular part of how they spend their free time, against 47% of fans without children. The obstacle is real and unresolved, and they go anyway.

And the looking forward starts earlier here than anywhere else. A night that takes a month to arrange gets a month of anticipation.

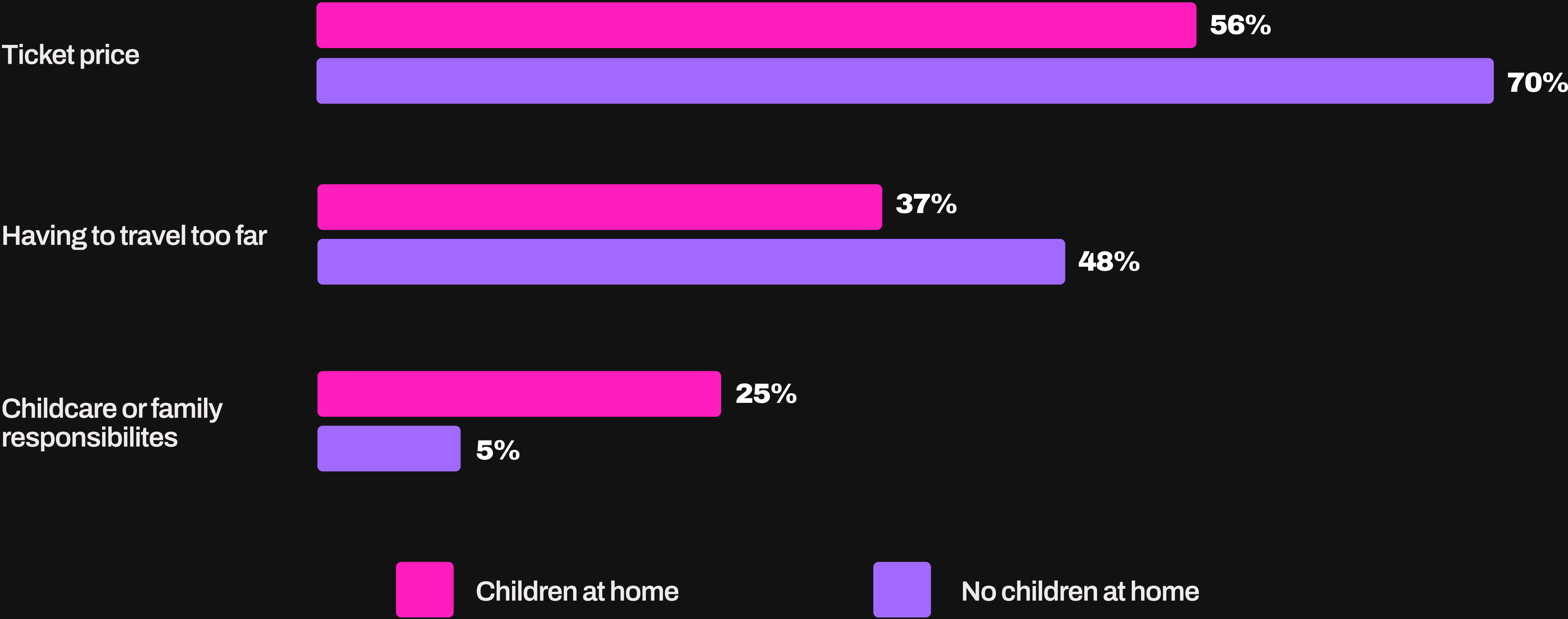
**THE SHORTCUT TO HAPPINESS ISN'T
JUST THE NIGHT OUT, IT'S THE ABILITY TO
BOOK ONE IN THE FIRST PLACE.**

Q7. Please indicate how much you agree or disagree with the following statements about live events (e.g. concerts, festivals, sports, theatre) (5pt scale).
Q8. What stops you from buying tickets to events?

**"[LIVE] GIVES US SOMETHING
TO ESCAPE MENTAL OVERLOAD
AND HELPS US FOCUS ON THE
GOOD THINGS."**

UK FAN, 37 WITH CHILDREN AT HOME

The same barriers land very differently depending on who is at home



Q8. What stops you from buying tickets to events?

ANTICIPATION IS THE FIRST THING FANS BUY

The need feels immediate. And even though the night is months away, the reward is not.

Fewer than one in five fans buy close to the event, and only 3% go right to the last minute. Emotional immediacy does not always mean spontaneous buying; purchase timing is reflected stronger by when desire aligns with affordability, availability and certainty.

Fans are also saying yes to less. Three-quarters say they are more selective about social experiences than they used to be, and it is not for lack of appetite: 63% value spending money on live experiences over buying physical things, a majority that holds in every generation. Each yes has to carry more.

Buying a ticket scratches an itch, and the weeks or months that follow are filled with little pops of anticipatory joy.

62% expect the emotional journey of a live music event to matter more than the setlist. That figure was stable across countries, and strongest among the fans who will be buying for longest: 67% of Gen Z against 52% of the over-60s.

"It's a good feeling having something ahead to look forward to."

AUS, FAN, 53

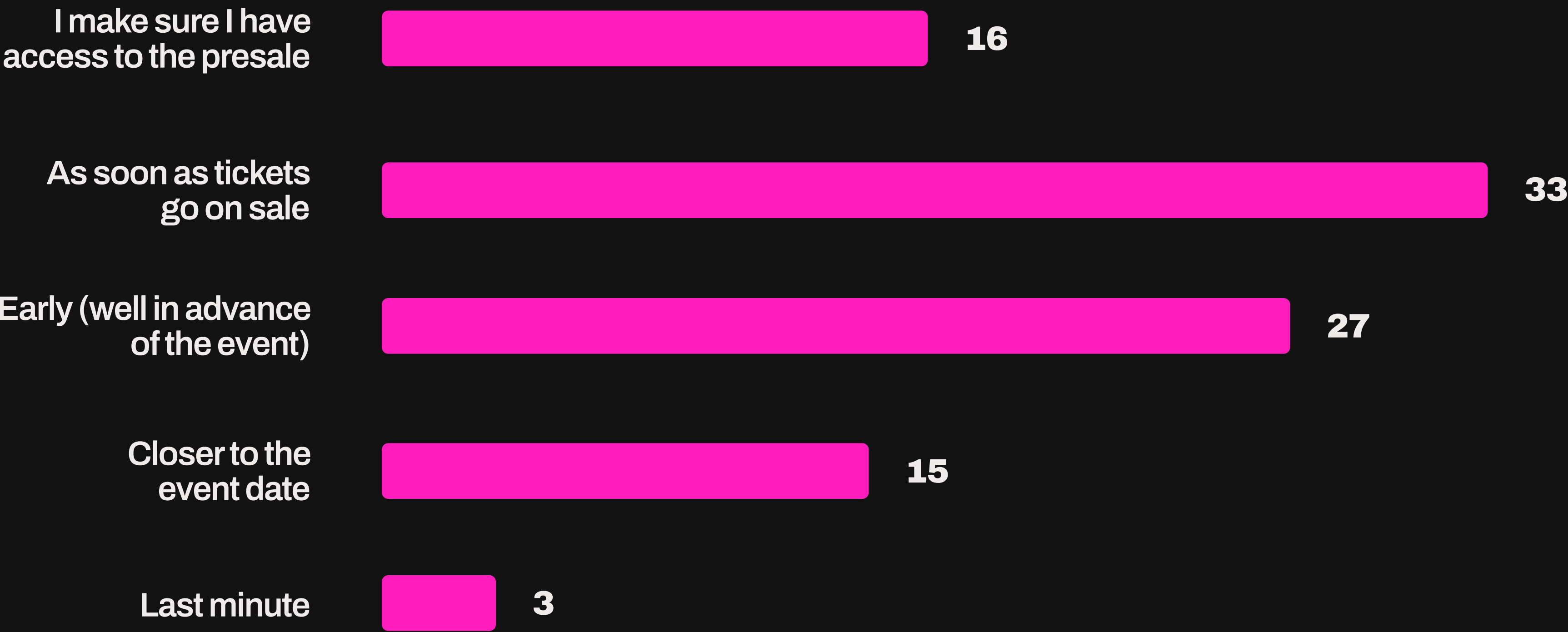
63%

value spending money on live experiences over buying physical things.

62%

believe the emotional journey of a live music event will matter more than the setlist

Thinking about how you usually buy tickets, when do you tend to purchase?



WHERE THIS GOES NEXT: THE 2030 LENS

The feeling has to survive a whole journey.

As people get more selective about what earns their time, they don't necessarily want more nights out. They want more dependable ones. Live already does something almost nothing else does: it lets you buy a feeling in advance, on a date of your choosing, and start collecting on the return immediately. That's a rare product, and the pressure that made it valuable isn't easing.

If happiness starts at the checkout, it can also be chipped away at long before the night arrives. A fake ticket, a cancellation, a friend who pulls out: the fan loses the night, and the months spent looking forward to it. The longer the reward has been building, the more a broken plan hurts.

So the days between stop being a gap to be endured and become something to be designed for and defended. By the early 2030s the advantage sits with whoever can keep the feeling intact from the checkout to reliving the experience.

FANS AREN'T JUST BUYING A SHOW. THEY'RE ALSO BUYING THE MONTHS OF LOOKING FORWARD TO IT.

FORCE #4 THE CERTAINTY PREMIUM

The previous force showed premium becoming a judgement about the whole occasion. The feeling that decides whether that judgement turns into a purchase is certainty: that the ticket is real, that the price is fair, and that the plan can change.

Almost everything in our lives has become much easier to undo. Ticketing went the other way, and remains one of the last high-friction, high-stakes decisions left in most people's leisure lives.

Fraud and scalping are trust killers, and trust is what commitment runs on. But that friction is solvable, not permanent. It's a result of how tickets are sold, priced and released, and what was built one way can be built another.

The opportunity isn't simply helping people buy tickets. It's helping people feel comfortable committing.

THE SHIFT

People are simplifying decisions everywhere, cutting effort and risk wherever they can.

THE FORCE

The certainty premium is the distance between what a fan risks and what the ticket guarantees. A real ticket at a fair price, or a changeable plan.

Q7_16. Please indicate how much you agree or disagree with "I'd rather pay more for a verified/guaranteed ticket than save money on an uncertain one."

Q15. How much does knowing you can easily resell tickets if your plans change increase your confidence in buying tickets?

Q19. How often, if at all, have you paid what you considered to be a significantly inflated price for a ticket through resale or secondary marketplaces?

Q20. How often, if at all, have you experienced ticketing fraud in the past 12 months?

**PEOPLE WANT LIVE
EXPERIENCES, BUT THE
JOURNEY TO COMMITMENT
NEEDS TO FEEL LIGHTER,
SAFER AND EASIER.**

**Making the buying feel as light as the attending
is the lever that gets there.**

ADDRESS FRICTION AS A SYSTEM, RATHER THAN A SINGLE BARRIER

Price, changing plans, logistics, social drop-out, access and safety combine to make the yes feel heavy. But what if we framed purchase timing as a form of risk management?

Ask fans when they typically buy and the majority says early. Over 70% put themselves at the presale, the on-sale, or well in advance, and that holds in every market. Only 3% call themselves last-minute buyers.

Fans describe their timing more neatly than an on-sale actually behaves. Real sales spike at the on-sale, go quiet, then spike again as the event nears. That U is getting flatter and less predictable. The gap between what fans say and what on-sales do is a case of friction, not desire. That makes timing something the industry can move, rather than a fixed trait of any market.

As Force 2 explored, a ticket sale has to overcome a lot of barriers. Some are about money. Others are just life: travel, work, childcare, plans already in the diary and none of these are easy to shift. There are some that are more malleable: hidden processing fees (22%), concerns about crowds/safety (22%), uncertainty about whether the event will be any good (16%), unfair dynamic pricing (13%), and no easy way out if plans change (9%).

The levers work differently at each end. Better seats (46% against 28%) and a likely sell-out (44% against 33%) pull hardest on the people who already buy early. The one lever that pulls harder on late buyers is being able to undo the purchase: a refund or exchange would move 34% of them, against 25% of early buyers.

RESOLVE THE RISK, REEL IN THE PURCHASE.

Q12. Thinking about how you usually buy tickets, when do you tend to purchase?

Q8. What stops you from buying tickets to events?

Q14. What would make you more likely to buy tickets earlier than you usually do?

WHY CAN'T WE ALL BE EARLY BIRDS?

There's no doubt that early sales benefit the industry. The show gets planned, the cashflow lands, the marketing has somewhere to point.

The most cited factor in inspiring earlier buying is price, with 57% of fans saying lower prices would move them; better seats follow at 41%.

Sitting in equal second at 41% is the fear of selling out, which we call FOSO. It's the steadiest motivator on this list, moving less than two points across all four generations while the others swing much harder. If we think tickets are going to fly, we're less prepared to take a risk. We're logging on for the onsale, or in many cases, the presale.

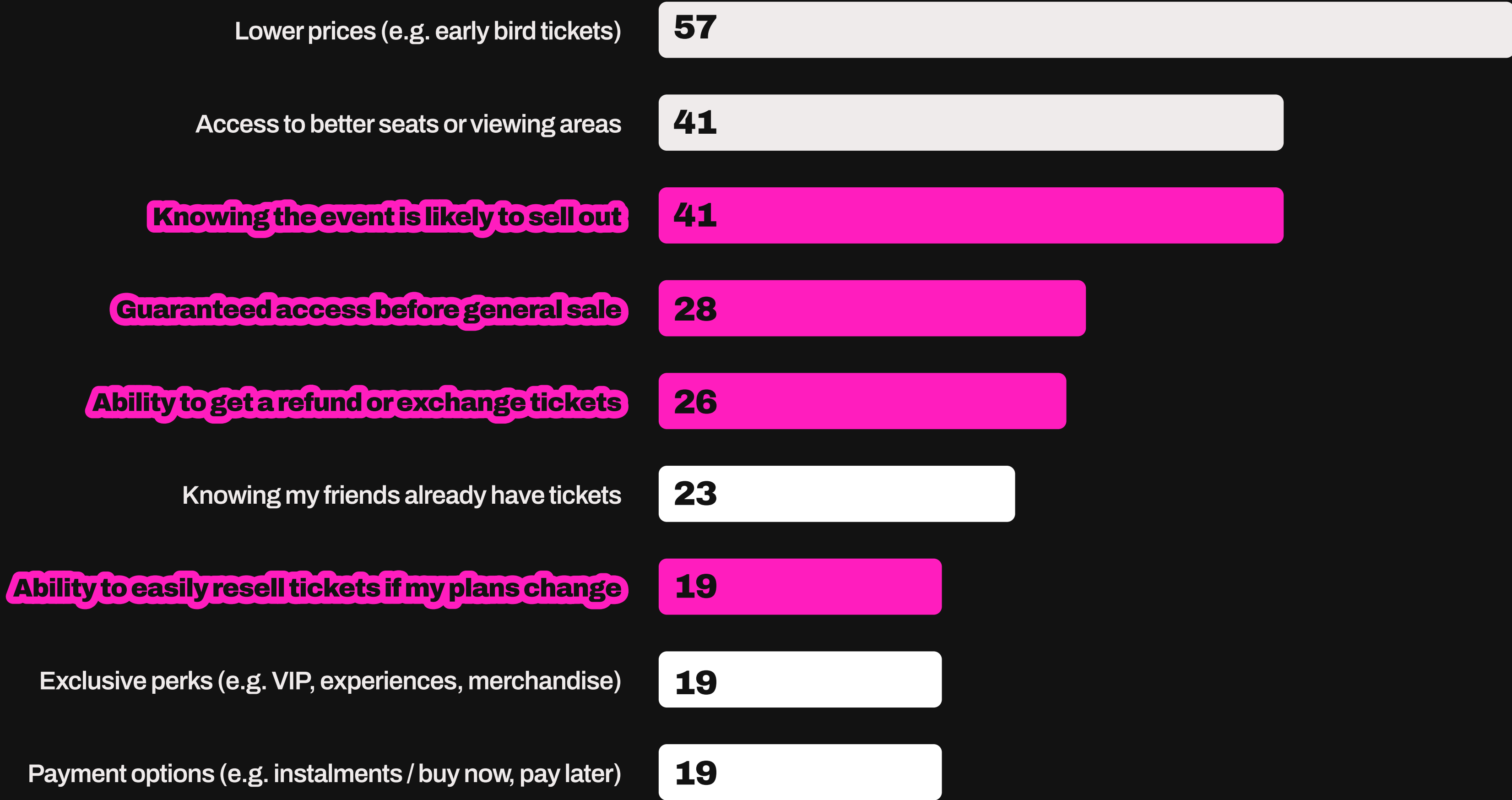
There are three certainty levers that are relatively low cost and sit within an organiser's control that are worth considering:

- Guaranteed access before general sale sat at 28%. Australia leads on this lever, at 30%, vs UK (27%) and US (25%)
- Allowing ticket liquidity: Whilst not easy to deliver, the ability to refund or exchange a ticket sat at 26%; An easier solve is allowing the ability to easily resell, which sits at 19% overall and rises to 24% among Gen Z.
- Providing payment options was motivational for nearly 1 in 5 (19%), rising to 22% of under-45s (compared to 15% of those 45+)

“I prefer the peace of mind of knowing I’ve secured them early. Because I worry they’ll be snapped up if I wait.”

UK, FEMALE, 43

The desire for certainty sits behind some key early purchase drivers



STRONGER RULES ARE NEEDED FOR FAIRNESS, AND OUR TRUST TO BE PAID BACK

When asked about rules contributing to fairness and protection, 8 in 10 fans believe both ticketing platforms and the wider live events industry need stronger and clearer rules. UK fans generally have higher expectations for safeguarding, compared to Australia and the US.

Ticketing and event platforms are our most trusted source when it comes to attendance decisions, even more than our friends and family. And the fans who trust platforms most are the ones demanding rules hardest: 87% of the people who name platforms as their most trusted source want stronger protections, against 79% of everyone else. Trust here is being lent on terms.

And we do believe we need protection: three-quarters believe bots and brokers are responsible for inflated resale prices. Nearly two-thirds expect their grip on access to tighten, not loosen. We'll come back to both of those numbers.

82%

believe ticketing platforms and the wider live events industry will need stronger and clearer rules to protect and remain fair for fans

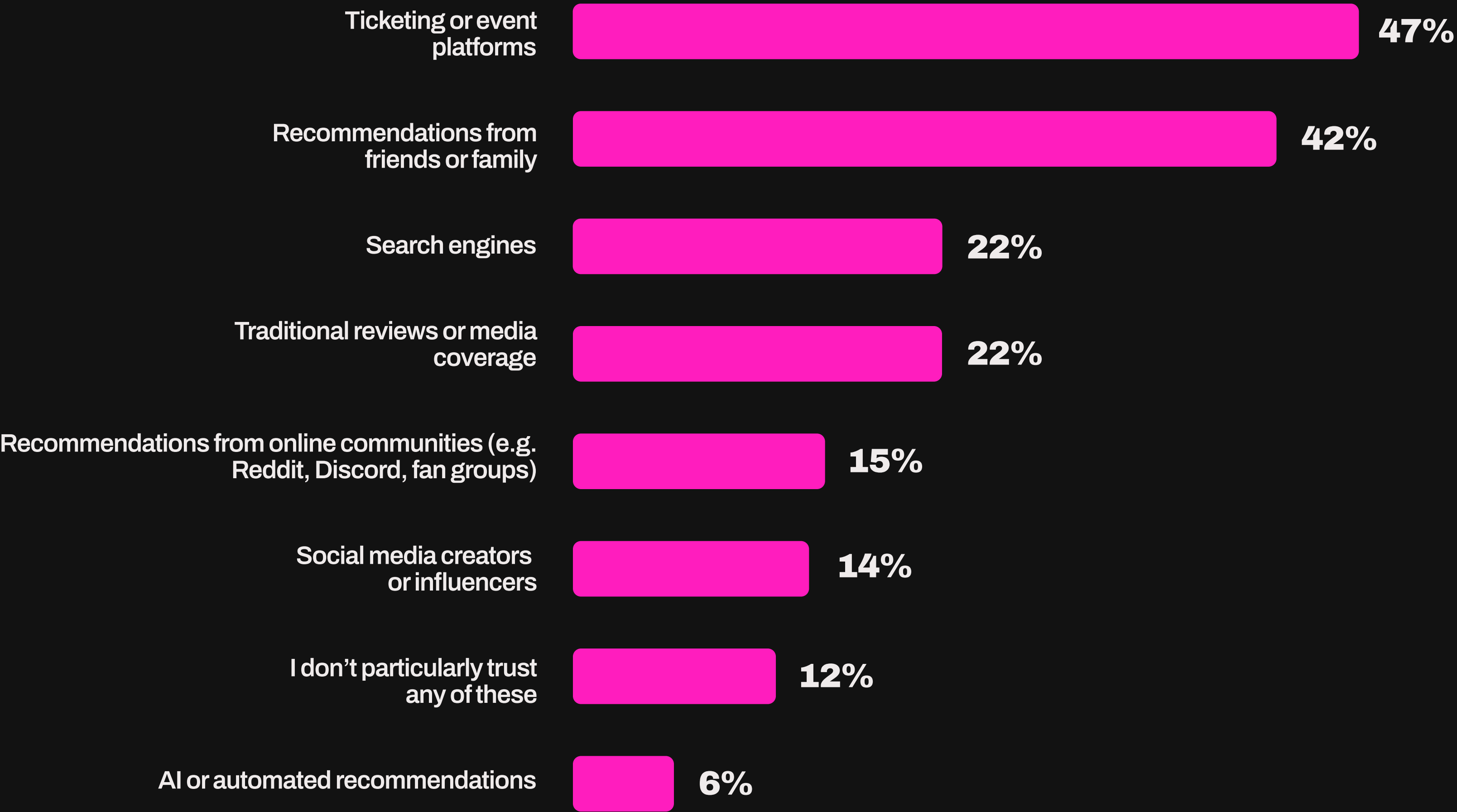
80% US, 86% UK, 81% AUS

Whether that conditional trust holds if the rules don't arrive is unknown.

What we can see is that fans aren't asking loudest where the harm is worst. The UK is the noisiest of the three, and it's the market where reform is closest to landing. Australia asks more quietly, and it already has the strongest fan protections. The US carries the most damage in this study and asks no louder than Australia. Predatory resale there is so embedded it has stopped looking like something that could be fixed. Quiet doesn't mean fine. Fairness is easier to build while fans are still asking for it.

Q8a. Looking ahead, how much do you agree or disagree with the following statements about society and live events?
(Q8a_6 platforms need stronger rules; Q8a_7 bots and brokers inflating prices; Q8a_8 industry needs clearer rules)
Q28. When deciding whether to attend a live event, which of the following do you trust the most?
Q29. Looking ahead, how much do you agree or disagree with the following statements about the future of technology and live events? (Q29_2 brokers and bots controlling access)

When deciding whether to attend a live event, which of the following do you trust the most?



ONE OF THE MOST RISKY PLACES TO BUY A TICKET COULD BE AT THE TOP OF THE SEARCH RESULTS

When asked whether they had experienced ticketing fraud in the past 12 months, 23% of fans told us they had. This rate sits higher than figures usually quoted in the industry. It is self-reported experience rather than verified incidence, and the base is fans who attended a ticketed event in the past year or tried to, so it's a more exposed group than the general public.

One interesting finding is how the victim connected with the seller. Fans who bought a resale ticket because it came up as the top option when they searched online were defrauded at 52%, against 29% of other resale buyers. That gap holds inside every generation, and Gen Z buy via that avenue four times as often as Boomers+. Deceptive ticket websites have long been flagged as a risk, and search is where fans meet them. What this can't tell us is whether that top result was a scam site, a paid ad or a legitimate marketplace, only that the fans who took it were nearly twice as likely to be defrauded.

23% of fans told us they had experienced ticketing fraud in the past 12 months.

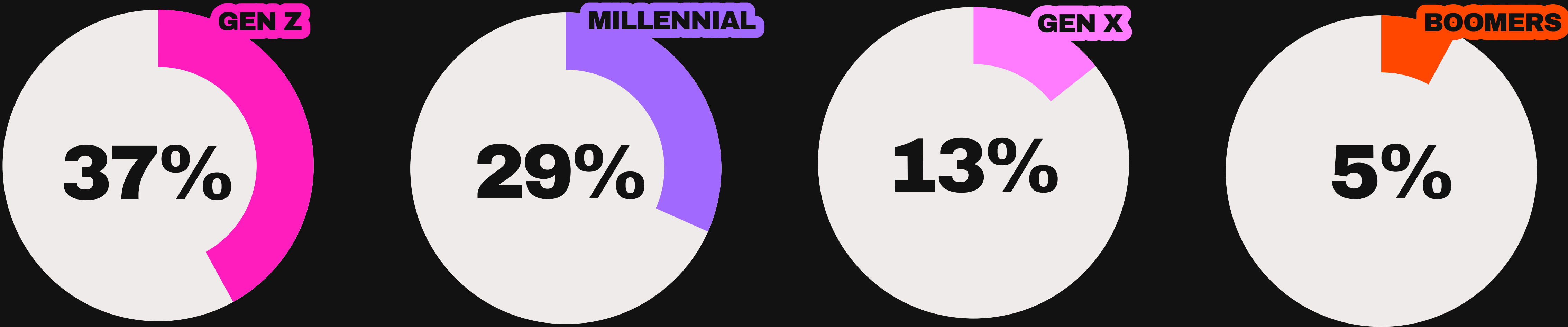
This number was markedly worse in the US at 29% compared to just 17% in AU. The UK sat in the middle at 25%.

That gap holds inside every generation, and Gen Z buy via that avenue four times as often as Boomers+. Deceptive ticket websites have long been flagged as a risk, and search is where fans meet them. What this can't tell us is whether that top result was a scam site, a paid ad or a legitimate marketplace, only that the fans who took it were nearly twice as likely to be defrauded.

Q20. How often, if at all, have you experienced ticketing fraud in the past 12 months?
(By 'ticketing fraud' we mean situations where individuals paid for tickets that were fake, invalid or non-existent, often through unofficial sellers, fraudulent websites or people falsely claiming to have tickets available.)

Q17. If you've bought resale tickets in the past, why do you usually buy them?

The younger the fan,
the more they got stung:



The easy explanation is that young fans are more likely to buy resale tickets, which is true, but it doesn't hold up. Among fans who have never bought a resale ticket at all, Gen Z are still defrauded at 24%, higher than Gen X who do buy resale.

SCALPING IS EVERYWHERE BUT IT ISN'T EVERYWHERE EQUALLY.

69%

Believe it's becoming harder for genuine fans to access major music events at fair prices, compared to more predictable access models seen in sports

66% US, 71% UK, 70% AUS

75%

Say bots and brokers are responsible for inflated resale prices.

75% US, 80% UK, 72% AUS

63%

expect Brokers and/or bots will increasingly control who is able to secure tickets to live music events

63% US, 67% UK, 60% AUS

Nearly half of all fans, 46%, have paid what they considered a significantly inflated price. The rate isn't the same everywhere, and the pattern isn't a coincidence.

Once again, our youngest fans are getting ripped off at a higher rate. Nearly two thirds of Gen Z have paid over the odds, 63%, against one in five Boomers at 20%. That 43-point gap holds in every market, from 36 points in the US to 52 in the UK.

Geographically, the US is worst off at 56%, the UK sits at 49%, Australia at 38%. Australians buy resale tickets less often than Americans, 55% against 67%, so part of that gap can be explained by less exposure but it's not the bulk of it. Among fans who have bought a resale ticket, an Australian is still far less likely to have been overcharged, 52% against 66%, and less likely to have been defrauded, 27% against 36%. Higher rates of resale follow an incentivised secondary ticketing environment, where there's money to be made from flipping tickets at much higher prices.

Australia's 38% is not evidence that resale rules fail. It's what the problem looks like after they have been applied. Strong protections shrink the problem, but there's still more to be done to stamp out predatory reselling.

Q19. How often, if at all, have you paid what you considered to be a significantly inflated price for a ticket through resale or secondary marketplaces? (Prices well above the original ticket cost, beyond typical booking or resale fees.)

Q20. How often, if at all, have you experienced ticketing fraud in the past 12 months?

Q17. If you've bought resale tickets in the past, why do you usually buy them?

Q8a. Looking ahead, how much do you agree or disagree with the following statements about society and live events? (Q8a_7 bots and brokers inflating prices)

Q29. Looking ahead, how much do you agree or disagree with the following statements about the future of technology and live events? (Q29_2 brokers and bots controlling access; Q29_11 harder for genuine fans than in sport)

"If an artist prices a ticket affordably, a secondary picks it up instantly, marks it up five, six times face value. That money leaves the ecosystem.

It's not reinvested into other artists' shows. It's not reinvested in keeping the club's infrastructure going.

These events, these promoters, run on very tight margins. If the scalpers sell 70% of the tickets at a huge markup, they may dump the last 30% at a cheap price, but they may choose to not dump them at all and just hold on to them. And then we have tons of people who don't come to the venue, and these venues make money on everyone who comes in."

RANDY NICHOLS
STRATEGIC ADVISOR, ARTIST MANAGER,
AND U.S. POLICY ADVOCATE

FANS AREN'T SCALPERS

Two thirds of fans have sold a ticket at some point, and 60% have bought one from someone else. The reasons on both sides are less glamorous than you'd think.

People sell because life moved

Force 1 covered the social half of this, that a ticket is about as likely to end up in resale because of someone else's plans as the seller's own.

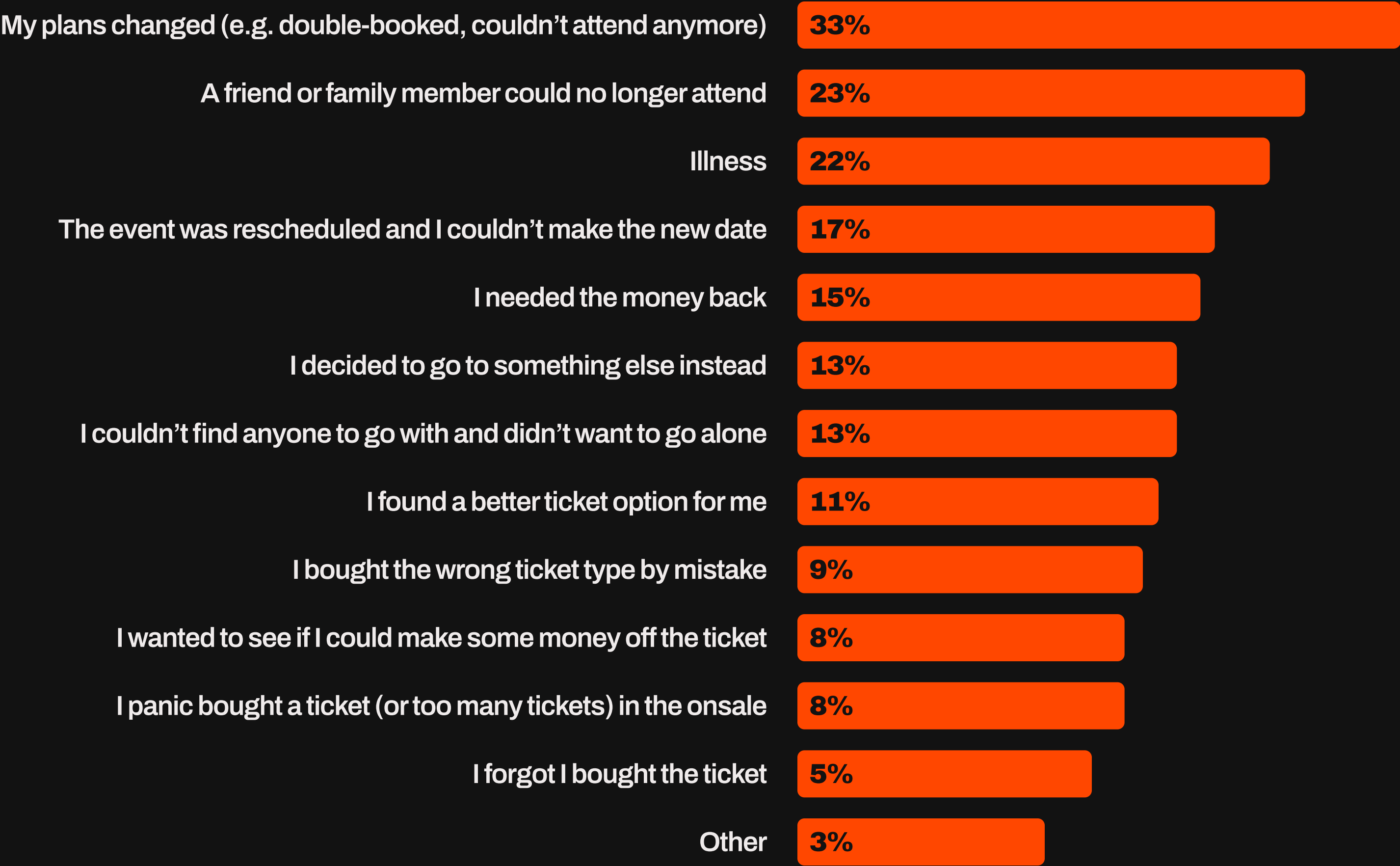
The rest is ordinary attrition. 22% of sellers had been ill, 17% had the event rescheduled under them, 15% needed the money back and 9% bought the wrong ticket type. Only 8% said they were keen to try and make a buck.

Most people buy resale because the front door was shut

37% of resale buyers were there because the original tickets had sold out, ahead of finding a better price at 26%, 22% just like buying late, and 21% bought from a friend or family member who couldn't go.

Nearly all of this is just life happening either side of the purchase, and when that kind of flexibility and spontaneity is enabled, there's more confidence to commit the next time around.

For those that have sold a ticket/s in the past, this is why they usually sell



THE EASIER IT IS TO CHANGE A PLAN, THE EASIER IT IS TO MAKE ONE

Two thirds of fans say knowing they can resell if plans change increases their confidence to buy in the first place.

That's 67% overall, and it runs highest among the fans with the most buying years ahead of them: 73% of Gen Z and Millennials against 53% of Boomers. Flexibility stops being a feature and becomes an expectation as the market ages in.

Ask instead how it changes their behaviour and a different picture appears. 28% say resale options make them buy earlier or more comfortably, while 32% say that where flexibility is limited they wait, buy only when certain they can attend, or don't buy at all. Fans notice the safety net mainly when it's missing, which means the cost of not offering it is larger than the gain from offering it.

Fans aren't highly sentimental about it. Asked how they perceive resale, 48% chose a positive frame: a safety net, a convenience, a route into a sold-out show. 36% chose a more negative one, mainly that it benefits scalpers or that the tickets are fake. Both are accurate descriptions, since both things are true of the larger secondary market.

I buy tickets [as soon as they go onsale] because it gives me a more flexible option if my schedule changes at the last minute.

UK, FEMALE, 43

**FANS COMMIT HARDEST WHEN
THEY KNOW THEY CAN BACK OUT.**

WHERE THIS GOES NEXT: THE 2030 LENS

**The rules are coming.
The demand is here.**

Fans will pay more for a guaranteed ticket right now, and they'll do it because guarantees are scarce. As the generations who treat flexibility as standard become the centre of this market, that premium erodes into an expectation. Today certainty is a reason to pay more. In five years, its absence will be a reason to walk away.

A second clock is running alongside it. Australia already caps resale prices across most states. Britain's cap sits in draft and isn't expected in law before 2027-28. The United States has movement at state level and nothing federal. The direction of travel is the same in all three. The question isn't whether resale gets constrained, it's whether the industry designs those constraints or has them designed for it.

But the prize isn't being ready when the rules land. It's the demand being lost today: the fans who delay, or buy only when they're certain, or never buy at all, because there's no way back out. That revenue is available now, to whoever removes the risk first.

**BUILD CERTAINTY IN NOW AND IT'S REVENUE. WAIT
UNTIL IT'S MANDATED AND IT'S JUST TABLE STAKES.**

FORCE #5 LIVING IN THE ALGORITHM AGE

Live is where people go to escape the algorithm yet the algorithm and AI is part of how fans are discovering, evaluating and accessing live experiences.

Fans have already worked out how they want to live with that: the machine can help, on their terms, with the give and take firmly in their hands. Algorithms can surface relevant events and make transactions easier, but greater automation also introduces questions about transparency, safety and fairness.

This force is about that conditional welcome, where fans will use AI, where they won't trust it, and the rules they want enforced around the people who misuse it.

Technology can open the door, but trust determines whether fans walk through it.

THE SHIFT

Machines moved into everyday decisions faster than trust followed. Live is where fans still want a person at the other end.

THE FORCE

Living in the Algorithm Age: The distance between what fans will let the machine handle and what they'll only believe from a person. Find it, yes. Vouch for it, no.

**AUTOMATION* MAY
STREAMLINE TICKETING, BUT
FANS WILL REWARD PLATFORMS
THAT MAKE ACCESS FEEL FAIR,
SAFE AND HUMAN.**

Every finding in this chapter should be read against that distinction:
automation and trust are two separate things to build, not one.

*By "automation" here, we mean the systems fans already encounter without necessarily naming them: algorithmic event recommendations, dynamic pricing, bot-detection at checkout, and AI-assisted customer support.

ALGORITHMS SHAPE WHAT FANS SEE. PEOPLE SHAPE WHAT THEY TRUST

Algorithms and AI will play a growing role at the top of the discovery funnel, helping fans navigate the events available to them. But exposure is not the same as endorsement.

When fans move from noticing an event to deciding whether to attend, trusted people, communities and established platforms carry more weight. AI can spark interest but trust turns interest into attendance and that trust is driven by our friends, family, or people online who have more clout.

Randy Nichols, strategic advisor, artist manager and US policy advocate said: **"You could go to AI now and say, find me a ticket to see this artist. And due to the tools that the scalpers are using, quite often the AI will recommend the scalper ticket before the legitimate ticket."**

64%

expect technology, such as algorithms, will increasingly influence what live music events you are exposed to

65% US, 66% UK, 63% AUS

53%

believe AI will make it easier for people to find events and experiences they will most enjoy

57% US, 55% UK, 47% AUS

58%

think online communities will become more influential than traditional search when discovering live events

61% US, 60% UK, 55% AUS

6%

say they trust AI or automated recommendations when deciding on a live event

6% US, 7% UK, 4% AUS

FANS WILL LET THE ALGORITHM SHORTEN THE SEARCH. THEY WON'T LET IT MAKE THE CALL.

AS RECOMMENDATIONS MULTIPLY, TRUST BECOMES HARDER TO EARN

More personalised content does not automatically create more confident decisions. As fans encounter a growing volume of recommendations, sponsored material and algorithmically selected content, the source and rationale can become more opaque.

Relevance alone is no longer enough. Fans also want to know why an event has been surfaced and what signals sit behind the recommendation.

68%

feel the rise of algorithms, AI and online content is making it harder to know what recommendations to trust.

Every market, every generation, the same answer.

**HUMAN AND CREDIBLE PLATFORM
SIGNALS MAKE THE POSSIBILITY
FEEL WORTH ACTING ON.**

Q29. Looking ahead, how much do you agree or disagree with the following statements about the future of technology and live events?

LIVE EVENTS FEEDING THE FEED

78% of fans say that people are sometimes more focused on capturing live events than experiencing them. It holds in every market and at every age below 60, where it drops.

It is a judgement fans are just as willing to make about themselves, with 64% agreeing that live events give them moments worth sharing online; significantly higher amongst US and UK fans compared to Australians.

Banter also contributes here with 52% agreeing that the conversation and hype on social media before, during and after an event is often as enjoyable as the event itself, highest amongst those under 45.

And as we look to the future, 69% agree that as AI evolves it will become less distinguishable from online human behaviour, a feeling that held steady across markets and ages.

As 2030 nears, we anticipate anything that is real, human, and present to have elevated value.

It is a judgement fans are just as willing to make about themselves, with 64% agreeing that live events give them moments worth sharing online; significantly higher amongst US and UK fans compared to Australians.

Banter also contributes here with 52% agreeing that the conversation and hype on social media before, during and after an event is often as enjoyable as the event itself, highest amongst those under 45.

And as we look to the future, 69% agree that as AI evolves it will become less distinguishable from online human behaviour, a feeling that held steady across markets and ages.

**HUMAN AND CREDIBLE PLATFORM
SIGNALS MAKE THE POSSIBILITY
FEEL WORTH ACTING ON.**

Q7. Please indicate how much you agree or disagree with the following statements about live events (e.g. concerts, festivals, sports, theatre)
Q29. Looking ahead, how much do you agree or disagree with the following statements about the future of technology and live events

**WE ANTICIPATE AN ELEVATED
VALUE BEING PLACED UPON
ANYTHING THAT CAN PROVE IT
IS REAL, HUMAN AND PRESENT.**

78%

believe that people are sometimes
more focused on capturing live
events than experiencing them

64%

say that live events give them
moments worth sharing online

80% US, 86% UK, 81% AUS

52%

agree that the conversation
and hype on social media before,
during and after an event is often
as enjoyable as the event itself

54% US, 56% UK, 47% AUS

69%

believe that as AI evolves, it will
become less distinguishable from
online human behaviour.

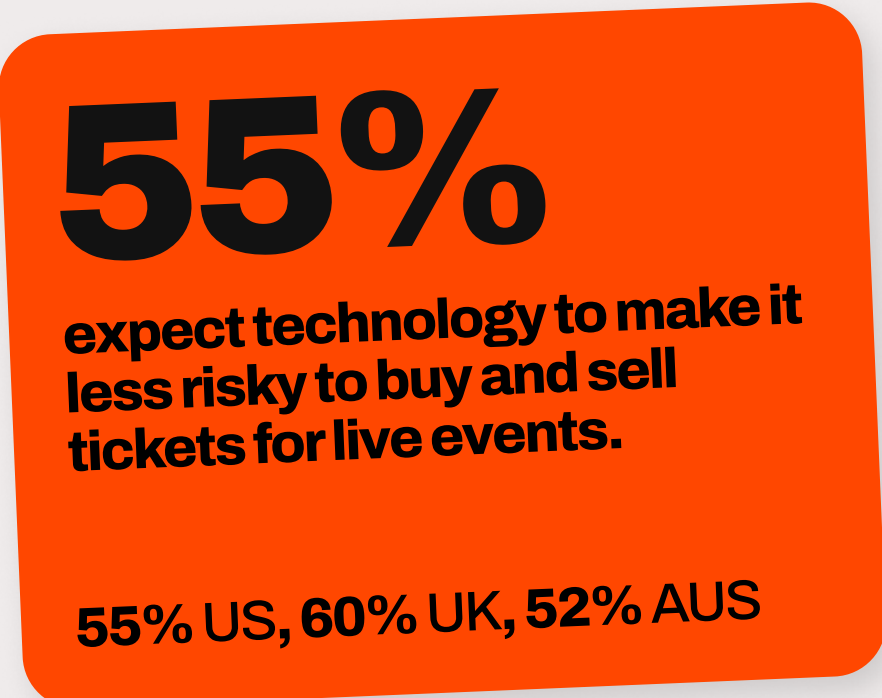
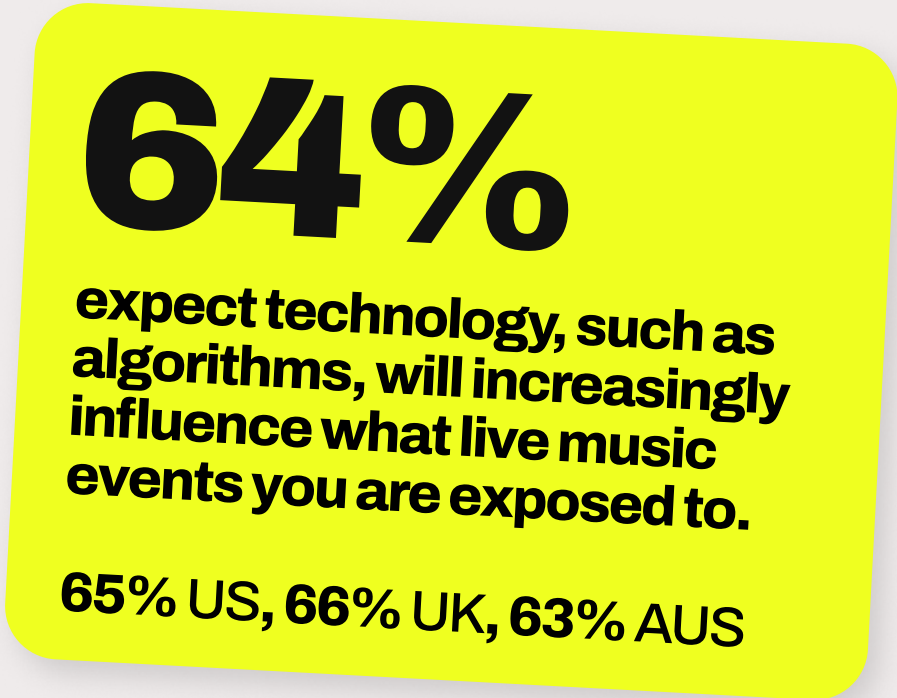
FANS EXPECT TECHNOLOGY TO MAKE ACCESS EASIER

But there's a lag in expectations around safety.

Fans expect technology to simplify ticket buying and selling, but confidence in its ability to reduce risk is not keeping pace, and the nine point gap between the two suggests that convenience alone is not enough. Fans feel convenience the moment they engage, while safety only announces itself when it fails, which could explain some of the lag. Every improvement in speed and ease needs an equally visible layer of verification, protection and reassurance.

Fans younger than 45 had higher expectations of technology than those over 45, and households with children at home also expect more on both counts, not just because they skew younger.

The role that parents are likely playing in managing technology on a younger person's behalf could mean they're spending more time thinking about the responsibilities it should or shouldn't have in their lives



SAFETY INNOVATION HAS TO BE AS VISIBLE AS CONVENIENCE INNOVATION.

Q29. Looking ahead, how much do you agree or disagree with the following statements about the future of technology and live events?



**ONE OF THE
HIGH-AGREEMENT BELIEFS
ACROSS AGES ISN'T ABOUT
MUSIC, PRICE OR COMMUNITY.
IT'S ABOUT ESCAPE.**

MAKE SMART FEEL HUMAN

The reason this matters sits in this dichotomy: 77% of fans say live events feel like a break from algorithms, automation and digital overload, one of only four beliefs in this study that does not split by age. Yet only 6% trust AI or automated recommendations when deciding whether to attend, the lowest of the seven options given. Fans go to live events to get out from under the algorithm, and they're not about to hand it the decision on where to go.

Fans are not rejecting technology. They are asking technology to become more understandable, protective and fair.

Trusted systems should help people discover relevant experiences, explain why recommendations appear, verify what is legitimate and protect access from manipulation. The strongest technology will not ask fans to choose between intelligence and trust. It will use intelligence to strengthen trust.

For now, the machine is barely in the room, but the feed is already embedded in it. Close to two thirds of fans find out about live events through a social feed, against 11% through AI. The interplay between feed-led and AI-led discovery is something to track as the AI layer becomes more prominent.

77%

believe that live events feel like a break from algorithms, automation and digital overload

THE FUTURE OF TICKETING IS NOT SIMPLY SMARTER TECHNOLOGY. IT IS SMARTER TECHNOLOGY PEOPLE CAN UNDERSTAND AND TRUST.

Q7. Please indicate how much you agree or disagree with the following statements about live events (e.g. concerts, festivals, sports, theatre)
Q28. When deciding whether to attend a live event, which of the following do you trust the most?

3. MARKET SNAPSHOT



DEFINING CHARACTERISTICS OF A US TICKET BUYER

56%

of US fans have paid what they considered a significantly inflated price on resale, at least once.

vs. 49% UK and 38% AU

67%

would find another way in rather than walk away when a coveted ticket costs more than expected

vs 61% UK and 62% AU

21%

usually buy late, either closer to the event or at the last minute.

vs 16% UK and 17% AU

43%

of US fans name ticketing platforms as their most trusted source, the lowest of the three markets

vs 49% UK and 49% AU

The US is the most exposed market and the most resourceful. Fans here commit later and when a ticket costs more than expected, they're the least likely to let it go.

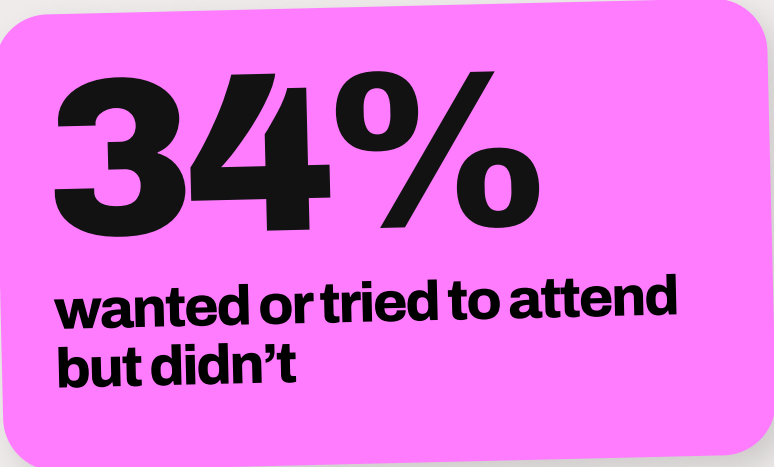
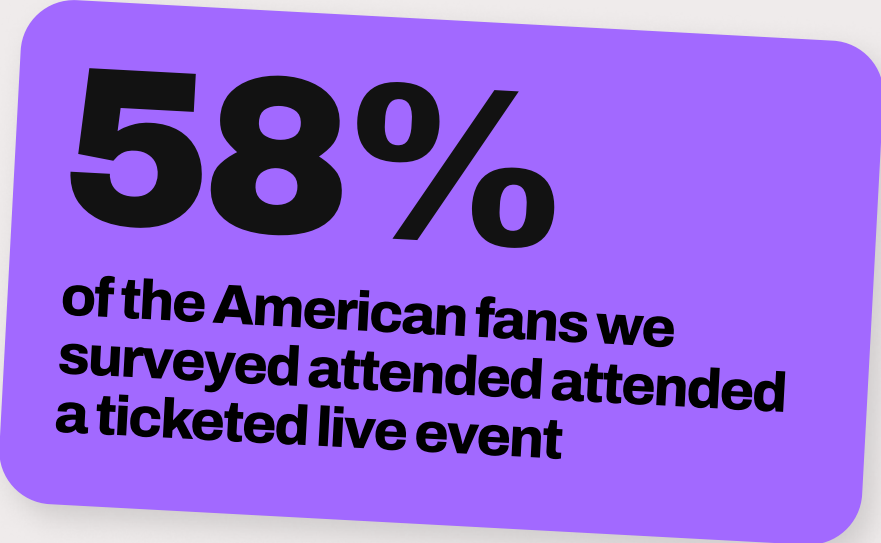
Q9. Imagine tickets for an artist you really want to see are more expensive than expected (e.g. you expect \$/£200 but they are \$/£350). What would you be most likely to do?
Q12. Thinking about how you usually buy tickets, when do you tend to purchase?
Q19. How often, if at all, have you paid what you considered to be a significantly inflated price for a ticket through resale or secondary marketplaces? By "significantly inflated", we mean prices well above the original ticket cost, beyond typical booking or resale fees.
Q28. When deciding whether to attend a live event, which of the following do you trust the most?

THE US BUYER PROFILE

Engagement with ticketed live events over the past 12 months has been lower in the US than other markets. However, there is a clear untapped demand with a third of fans keen to attend but unable to, mostly due to availability, affordability or convenience.

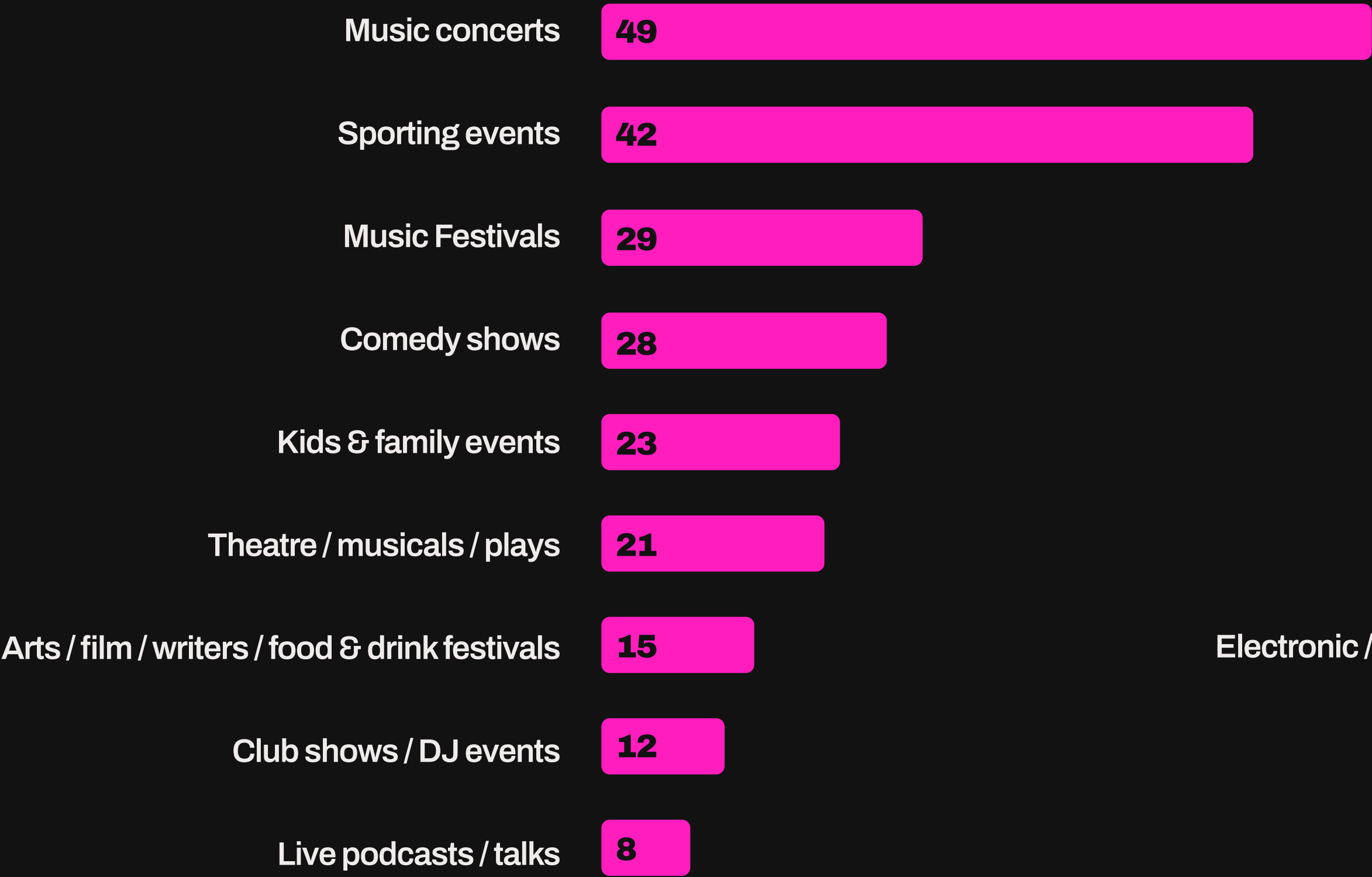
Music concerts, sporting events and music festivals are the three leading ticketed live event formats in the US. Smaller venues and sporting events drive more frequent attendance. Rock and hip hop/rap both run meaningfully above the UK and AU. R&B/soul and country preferences are stronger here than in either of the other two markets specifically, not just stronger than a blended global figure, and this market has less emphasis on pop.

This suggests an opportunity to unlock participation through better-value offers, improved access and event propositions that reflect local genre preferences.

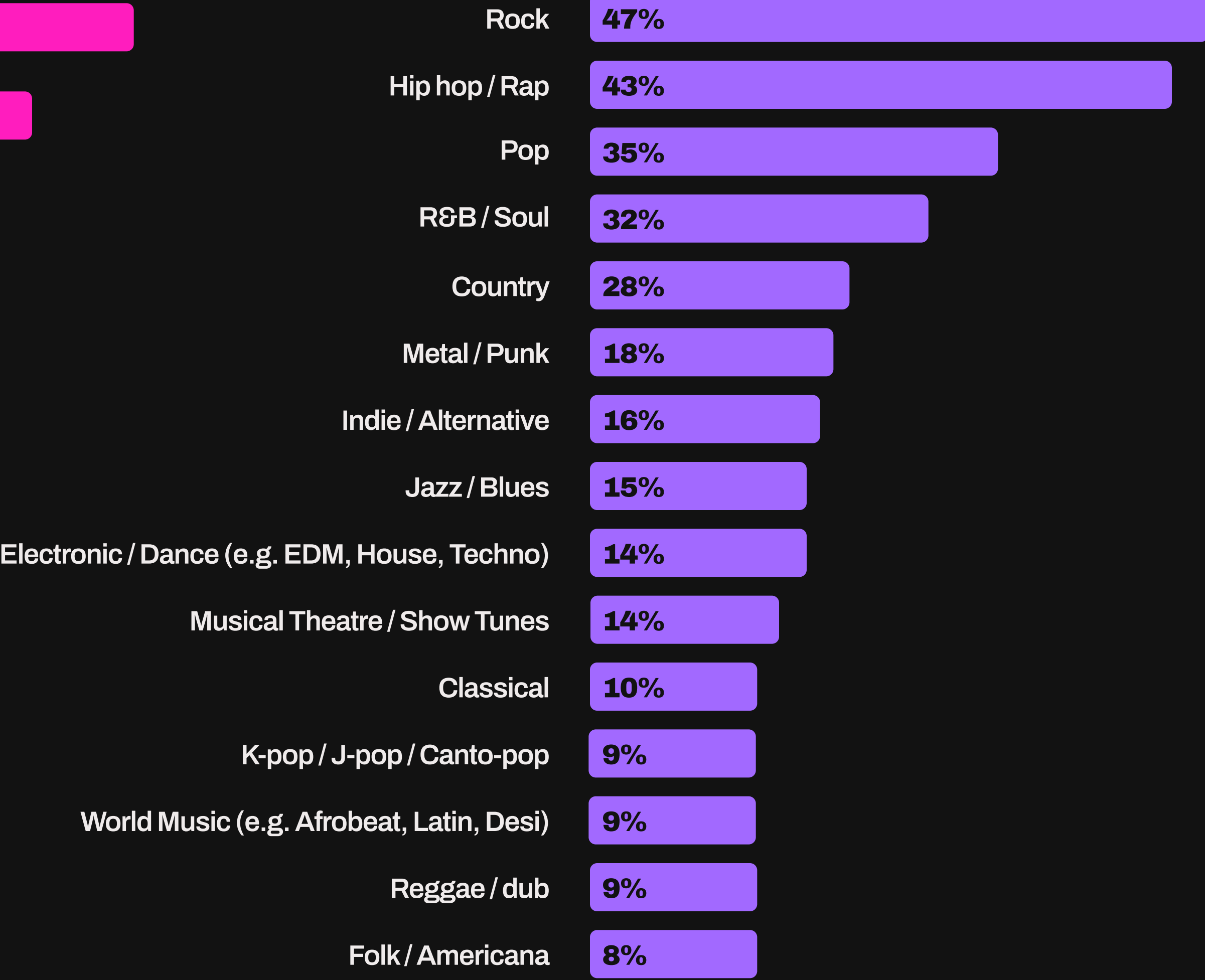


Q1. Which of the following event types have you attended in the past 12 months?
Q3. Which of the following music genres have you seen live in the past 12 months?

Event type attended



Genre of music attended amongst concert/festival/club goers



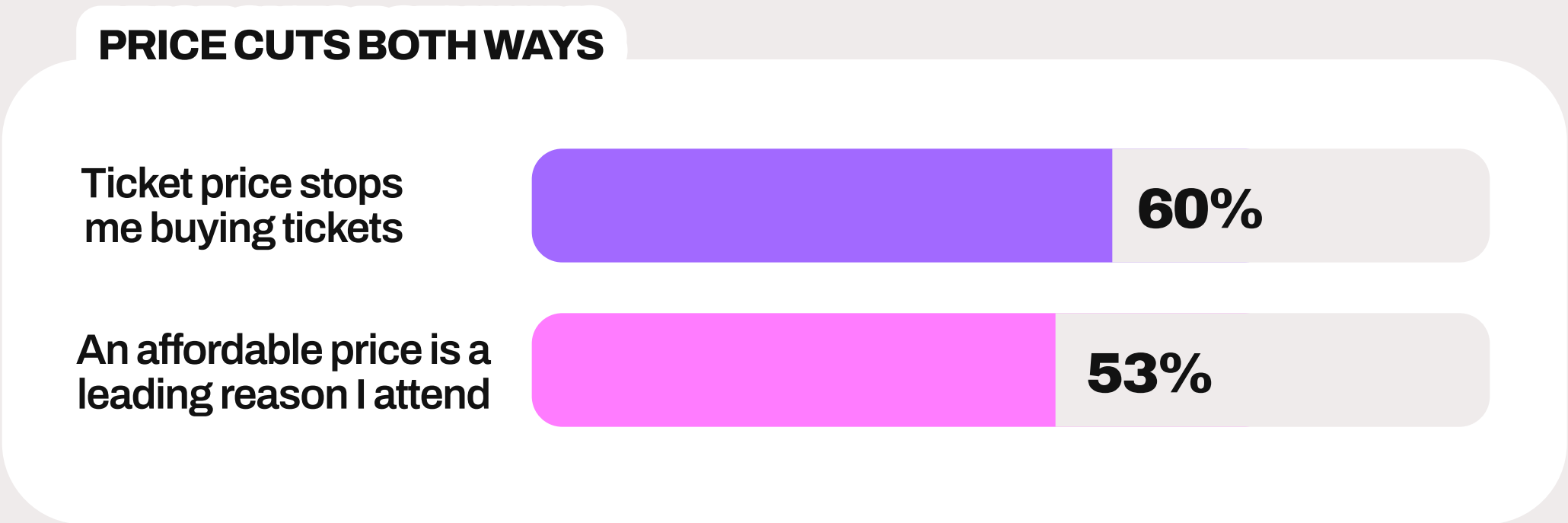
IN THE US, PRICE IS THE REASON TO GO, AS OFTEN AS IT'S THE REASON NOT TO

Affordability is the most-cited reason American fans attend and one of the biggest reasons they don't. The payoff they're weighing it against is among the highest in this study.

On every emotional measure in this study, American fans sit above the other two markets surveyed. Live as release, as escape from the everyday, as the way you spend time with the people you care about all rate higher than British or Australian fans.

Price is doing double duty. 60% name ticket price as something that stops them, and 53% name an affordable price as a leading reason to attend, again, the highest of the three markets. Those are answers to two different questions, and they point at the same thing: in America the decision runs through price whichever way it's going.

So this isn't a market that needs convincing the night is worth it. It believes that more firmly than anywhere else. It's a market that needs the arithmetic to work, and will try the hardest to balance the equation.



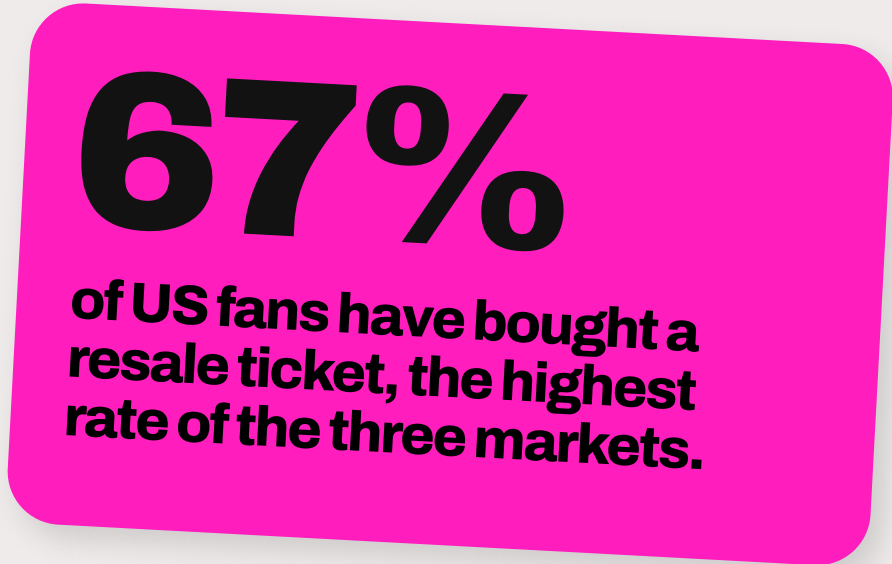
AMERICANS AREN'T DECIDING WHETHER THEY WANT TO GO. THEY'RE WORKING OUT IF THEY CAN, AND HOW.

Q5. What are the reasons you choose to buy tickets to live events?
Q7. Please indicate how much you agree or disagree with the following statements about live events (e.g. concerts, festivals, sports, theatre)
Q8. What stops you from buying tickets to events?

TICKET RESALE IS THE ROAD, NOT THE DETOUR

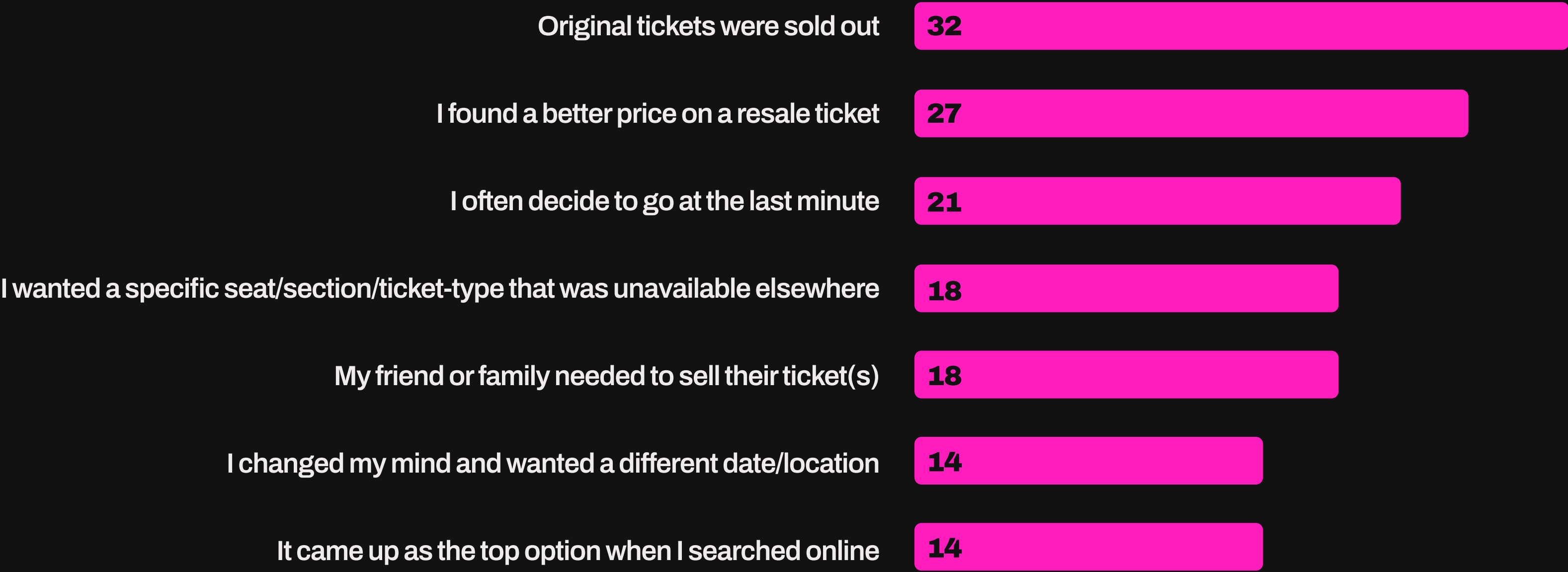
Resale helps US fans access sold-out events, find better prices and make last-minute decisions, even when it costs them more

Asked which single phrase best reflects their view of resale, just over half of US fans (51%) pick a functional or matter-of-fact one: a safety net when plans change, a normal part of modern ticketing, a convenient way to buy or sell, or a way into sold-out events. A third (34%) lead with a criticism: that it mainly benefits scalpers, that the tickets are usually fake or risky, or that it makes prices feel less accessible. One in seven say they have no strong opinion at all.



USAGE IS HIGHER, BUT SO IS THE BURN.

Why US fans buy resale tickets



When asked why they usually buy resale, US buyers are most often chasing something they can't get elsewhere: a sold-out show, the seats they wanted, or a different date or venue. Other times they found a better price, or they decided to go at the last minute.

CREDIBILITY IS UP FOR GRABS

One in eight American fans don't trust any of the most common sources of information when deciding whether to attend a live event.

Ticketing platforms are the most trusted source American fans cited when deciding whether to attend. That lead is just one point over recommendations from friends and family, and at 43%, is the lowest platform trust of the three markets, against 49% in both Britain and Australia.

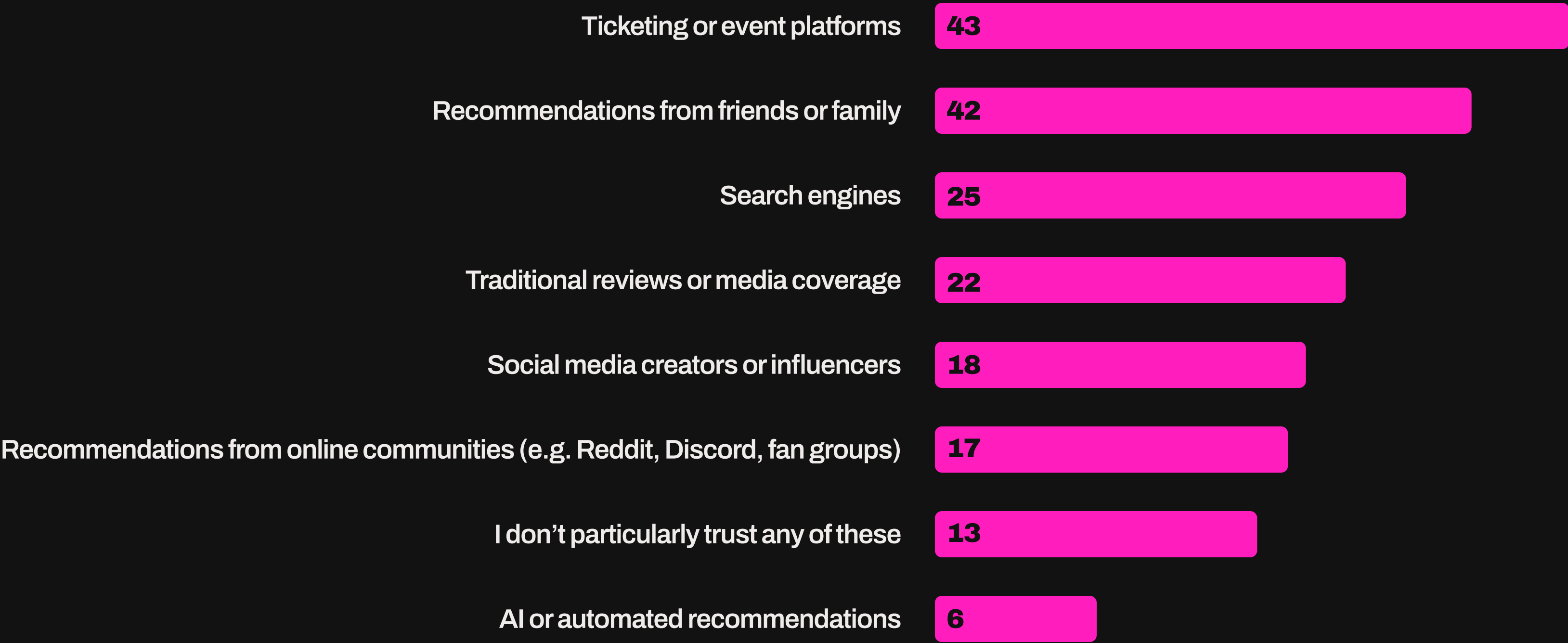
Below the top two there's a steep drop. Search, media coverage, creators and online communities all sit between 17% and 25%. AI is trusted by just 6%. And 13% of American fans say they don't particularly trust any of the options offered.

However, the search finding deserves a double click. A quarter of US fans name search engines as a trusted source, and resale buyers who say they usually buy because a listing came up top when they searched online report ticketing fraud at 51%, against 33% of other resale buyers. That is an association rather than a cause.

Listings at the top of search engines are often bought. A 2018 review by the US Government Accountability Office found that white-label resale sites frequently appear as paid search results for venues and events, charging fees sometimes above 40% of the ticket price and marketing themselves in ways that could mislead buyers into thinking they were buying from the venue. Paying for placement is ordinary advertising but building a website that tries to pass for an official one is not. Deceptive ticket-selling websites are a pervasive problem across the US.

This has prompted a wave of state-level legislation. Alongside states like Maryland, Maine, and Oregon, a growing number of states have now enacted laws banning secondary marketplaces from using look-alike URLs and deceptive site designs to mimic official venues.

Trusted sources of information when deciding whether to attend



**IN BRITAIN AND AUSTRALIA,
TICKETING PLATFORMS
ARE CLEARLY THE MOST
TRUSTED SOURCE.**

**IN AMERICA, THE
TRUSTED-PLATFORM
POSITION IS STILL VACANT.**

ROCK STILL LEADS AMERICA. HIP HOP IS INHERITING IT.

The United States is the only one of the three markets where Pop isn't the biggest live genre. Rock is, at 47% of American music-goers, and it still leads clearly from Gen X upward. But not below it. Among Millennials, Rock is fairly level with Hip hop/Rap, and among Gen Z it has already lost: 60% of American Gen Z's saw Hip hop or Rap live in the past year against just 40% for Rock.

The two fan bases are shaped differently, too. Hip hop's American audience sits in the two youngest generations, three quarters of it under 45, whereas Rock's reach spreads evenly across all four generations.

R&B and soul reach 32% of US music-goers against 24% in Britain and 16% in Australia. Country reaches 28% against 17% in both. Two genres that are minority interests elsewhere are mainstream here.

Top music genres American fans have seen live in the last 12 months

	HIPHOP/RAP	ROCK
Gen Z	60%	40%
Millennial	48%	49%
Gen X	33%	53%
Boomer +	8%	41%
Average of all US fans	43%	47%

Q3. Which of the following music genres have you seen live in the past 12 months?
Base: attended a concert, festival, club show or theatre, Q8. What stops you from buying tickets to events?

AMERICA WILL FIND A WAY IN.

The fans who will define 2030 are already in the data, and they split America down the middle.

This makes America the one market where fairness is still a competitive position rather than a cost of entry. In Britain, when the rules arrive, every platform becomes fair by statute. Here, being demonstrably fair stays something a fan can actually choose between.

Under 45, Americans find a way in. Only 19% of Gen Z and 23% of Millennials would walk away from a ticket that costs more than expected, against 51% of Boomers, and they name price as a barrier far less often, 52% of Gen Z against 73% of Boomers.

They pay for that resourcefulness. 46% of American Gen Z met ticket fraud in the past year and 69% have paid an inflated price, the highest of any generation in any market we surveyed. Over 45 the pattern reverses: the third of fans who wanted to go and didn't is mostly Gen X and Boomers, at 42% and 43%, against 28% of under-45s.

Trust is moving with them, but not towards platforms. Platform trust is flat across every American generation under 60, at 44 to 46%, and drops only among Boomers. What splits by age is everything else: 28% of Gen Z trust online communities against 5% of Boomers, 31% trust creators against 3%, and 15% have bought a resale ticket because it came up first in search, four times the Boomer rate. Under-45s also ask for rules least loudly, 78% against 86% of Boomers.



US fans carry the most damage of the three regions: The highest rates of fraud and inflated prices. The lowest trust in ticketing platforms. And the largest share of fans who wanted to go and didn't.

**BY 2030 THE AMERICAN FAN
FINDS A WAY IN, PAYS FOR THE
PRIVILEGE, AND TRUSTS NO SINGLE
SOURCE TO TELL THEM WHERE TO GO.**

**NO PLATFORM WILL BE GIVEN THAT
POSITION BY DEFAULT.**

SUMMARY

EVERY TICKET HAS TO EARN ITS PLACE. BY 2030, SO WILL EVERY PLATFORM.

In 2020 people guarded their money. In 2025 they guard their time, and the gap is still widening.

By 2030 a ticket is no longer a purchase, it's a bid for someone's evening, their friends' evenings, and their faith that the night will pay all of it back. The fans who will decide whether the payoff is there are already in this data: they are the under 30s who go out the most, get burnt the most, trust platforms about the same as everyone else, and trust their friends, their communities and their creators a lot more. Beyond Gen Z, here's what else we think will shape live as we approach 2030.

THE TICKET BECOMES A PLAN YOU JOIN, NOT A THING YOU BUY. It's bought by a group, split without a spreadsheet, and passed on when someone drops out at the price it was bought for. Everything wrapped around the room, from onsale to exit, either protects the feeling or gets cut.

FAIR MIGHT STOP BEING A SELLING POINT. IT DEPENDS WHO MOVES FIRST. If Britain's Ticket Tout Ban Bill passes, fair becomes the law there and stops separating one platform from another. If Washington keeps leaving it to the states, fair stays a choice a fan makes. Australia keeps buying from whoever already behaves. Either way, the trust goes to whoever built fair before it became mandated.

THE MACHINE COULD FINALLY EARN A FAN'S TRUST. UNLESS IT'S SOLD TO THE HIGHEST BIDDER. A feed already knows which show a fan would have missed. The question for 2030 is whether it says so, or sells that spot to whoever pays. Sell it, and the smarter it gets the less fans believe it. The industry decides which, not the technology.

