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INTERNATIONAL TICKETING REPORT

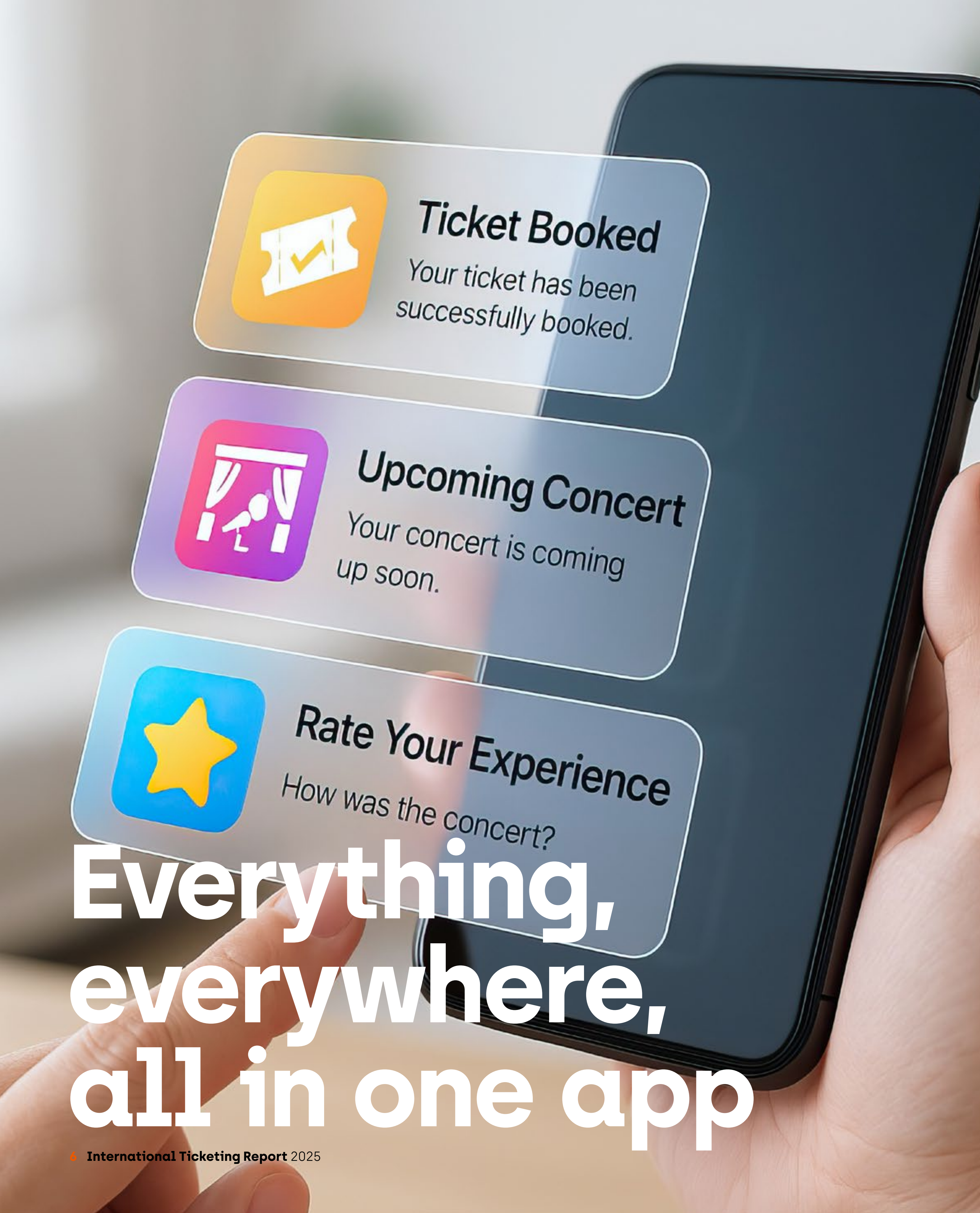
2025

68
COUNTRIES PROFILED

The global guide to the live entertainment ticketing business

In-depth:
- Digitisation
- Dynamic pricing
- Consolidation
- D2C ticketing
- Regulation

Eleventh edition



Everything, everywhere, all in one app

Once a simple entry pass, a ticket is now a multifunctional digital tool offering CRM, upselling, security, direct-to-fan strategies, and more. **Eamonn Forde** explores how the shift to digital has unlocked a suite of opportunities.

The "analogue era" of ticketing, back when tickets were flimsy pieces of paper that just got you into a show, is long gone. Initially, digital was the sales and distribution channel for tickets, superpowered by the arrival of the iPhone and apps in 2007; but today, tickets are increasingly smarter, doing a multitude of things, from delivering upsells to offering audience behaviour predictions, and can help counter scams and fraud.

"[Tickets now] include wallet integration, dynamic content, access tools, upsells, and upgrades but also special fan moments, exclusive content, and tailored communication to deepen the experience long before and after showtime," says Karel Dörner, chief technology officer at CTS Eventim, revealing just how central they have become to customer relationship management (CRM).

Tickets are not just a purchase in and of themselves; rather, they are a catalyst for upselling once at the venue. "With the digital wallet that recognises who you are and where you are, organisers can offer fans more," explains Frédéric Longatte, CEO of SECUTIX. "For example, if there are spare seats in a more desirable area, when you enter the venue, the wallet can notify you and display a 3D seat view upgrade option. With just a few clicks, you can enjoy a better view of the gig."

With all the data generated by, and around, tickets, they offer incredible levels of insight into consumer behaviour. "With TM1's advanced reporting tools, venues and promoters get a clearer picture of what fans are doing, from how they buy to what they're interested in, which gives them the insights they need to provide and shape even better fan experiences," says Taggart Matthiesen, chief product officer at Ticketmaster.

These insights are being amplified even further by the use of AI to help all in the live ecosystem make quicker and smarter decisions. "We're leveraging machine learning to analyse fan behaviour and preferences, enabling us to deliver personalised recommendations and offers throughout the customer journey," says Dörner. "These insights are also feeding into the development of entirely new services and products that enhance the live entertainment experience."

He adds, "We're also exploring AI-driven analytics to predict attendance patterns and optimise resource allocation, enhancing operational efficiency and fan satisfaction."

For Blaine Legere, president of international at AXS, AI can deliver a much deeper understanding of customer behaviour, as well as customer needs. "Tickets are just one surface to capture intent, preferences, and insights about fans," he suggests. "Because events are increasingly about the entire experience in the journey, we have to lean into new and creative ways to embrace the signal that fans are sharing with us across multiple surfaces. With advancements like AI that help glean intent, it's an exciting time to think about where we take fans next […] With the ability to model and predict fan behaviour more accurately than ever before, our platform will necessarily evolve to meet the ever-changing expectations of our fans."

For Martin Haigh of Total Ticketing, the big open goal is using the purchase confirmation page of a ticketing website or app for sponsored activations. "That page has got almost a 100% 'open rate', unless you die whilst buying the ticket!" he laughs. "People aren't using that [enough] for sponsored activations." He also feels using APIs to link tickets to travel agents and hotels is another opportunity sitting waiting for the ticketing business.

The fact that tickets can be updated in real time, and link into everything that a smartphone does, is also a way to improve the customer experience, doing things that felt like science fiction even as little as 20 years ago. "The SECUTIX mobile wallet will be able to detect whether an attendee is too far from the venue to arrive on time," notes Longatte. "In such cases, it will send a message to check if they are still planning to attend. If they are not, the wallet offers a simple one-click option to resell their ticket."

He also views the direct-to-fan possibilities inherent in digital tickets as nothing short of revolutionary. "We're seeing a rise in music artists who want to have a direct relationship with their fans because they're frustrated with the status quo and want a new way to communicate with and sell tickets to their loyal fans," he says. "We call them 'entrepreneur artists.' Whether they are established or up-and-coming, entrepreneur artists share a common desire to take back control of ticketing, nurture their fanbase directly, and use a more direct-to-fan model than the old distribution model."

In brief, artists are increasingly seeking to control the data from their ticket sales and want to feed that information into their own marketing analysis ecosystems, such as Openstage, which hoover up data across socials, streaming, merch and more to offer deep understanding of fans, and personalised messaging.

Perhaps the biggest leap forward for tickets, as a countermeasure to the proliferation of scams and fraud, is the pulling in of biometric technologies.

Daniel Križan, co-founder and CEO of biometrics company TruCrowd, says the origins of biometrics and ticketing are in South America, intended to tackle ticket fraud and scalping/bots but also to deal with overcrowding issues (to streamline ingress and egress) and to help keep known gang members out of events. "It became law in Brazil," he says. "Every stadium with a capacity of over 20,000 people has to use this technology. It has scaled to other countries and is mandatory in Mexico and Ecuador for football matches."

He says there are attempts by fraudsters to override fa
recognition technologies, but companies like his have
multiple countermeasures in place. "We do all the ch
make sure you are not showing a fake photo or a d
says. "There is 'liveness detection,' which means
detecting whether or not the person is real w
selfie – so ensuring it's not a digital photo
a 3D mask."

Longatte, discussing the rising us

Q&A

Arndt Scheffler

AXS Germany

The MD of AXS Germany, one of the newest entrants into the CTS Eventim-dominated market, shares how the company is planning to grow in one of the world's biggest music markets.

How did you get into the business?
I received a compelling offer and left the airline industry to dive into the crazy world of ticketing and live entertainment.

In 2012, I founded my own ticketing company [eCommerce], which became part of AXS last year. Myself and my outstanding team are paving the way for a platform that sets new standards: more secure, more flexible, and designed with fans and promoters in mind. A real alternative.

AXS launched in Germany last year. How has that rollout gone, and what have you learned from the first year?
I'm exceptionally proud that we have implemented our industry-leading suite management and access control platform at both Uber Arena and Barclays Arena.

Our premium services have elevated marketing capabilities and simplified guest management for suite holders, giving them greater control over their tickets.

Collaborating closely with AEG teams in Berlin and Hamburg helped us refine the rollout and support, ensuring the platform integrates seamlessly with our partners' operations. We also learned the importance of localising not just the product but how we communicate and collaborate – insights already guiding our expansion in Europe.

Germany's live entertainment market is one of Europe's most competitive. How is AXS positioning itself to serve international tours and domestic promoters?
Germany is seeing a major shift toward digital ticketing, driven by security concerns and evolving fan expectations. Fans want a smoother and more reliable experience, and promoters deserve greater control and flexibility.

AXS Mobile ID has been a game-changer, giving promoters the power to manage transferability and resale – or lock tickets entirely to prevent fraud. For fans, it's simple and secure, reducing scalping and fakes across the board – something the entire industry grapples with.

And we are committed to being transparent, fair, and open with fans and promoters, with partnerships based on mutual respect and support.

Can you share your thoughts on the planned secondary ticketing legislation in Germany and how AXS's product suite will be able to respond to that?
We see it as a positive step toward greater transparency and fairness for fans. We believe they should know exactly where their tickets come from and what they're paying for – and that artists, teams, and venues deserve more control over sales and resale.

With tools like AXS Mobile ID, dynamic barcodes, and the AXS Official Resale marketplace, we offer a secure and easy experience that gives partners control and fans a trusted way to buy or resell at fair prices.

If the legislation moves forward, we're well-positioned to help partners stay compliant – and to continue driving a more fan-friendly ticketing industry.

What do the next five years look like for AXS in Germany?
For me, it's about striking the right balance – using cutting-edge tech while staying true to what fans and promoters value most: trust, control, and great experiences.

We're leveraging data more intelligently, integrating with venues and marketing systems to personalise the fan journey and connect the right fan to the right event at the right time – all while making ticket-buying easier.

And we're constantly evolving our tools to make life harder for bad actors looking to take advantage of the system.

Germany is an attractive market that needs more diversity and innovation. We are committed to this by offering a more modern ticketing experience and taking the needs of stakeholders into account.

Netpositive provides a white-label service for clients including EXIT Festival © Miloš Krstić

The rise of D2C ticketing

Direct-to-consumer ticketing has grown quickly recently, giving promoters and artists more control over sales, data, and fans. Ben Lee looks at what's driving the shift – and why the big B2C players still matter.

All the major primary ticketing companies now provide direct-to-consumer (D2C) tools as part of their wider offering. But a growing crop of independent and white-label platforms has emerged, building their businesses around D2C as a standalone proposition. That means rights owners – artists, festivals, and promoters – can increasingly choose to sell directly to fans and attendees, without leaning on the reach of traditional business-to-consumer (B2C) operators.

Ticketing consultant Tim Chambers, who previously held roles at Ticketmaster and Live Nation, says right owners are now "fighting for market share within the live entertainment sector and potentially greater control over revenues."

IQ spoke to nine companies in the D2C and white-label space. All of them highlight the same advantages: ownership of customer data, scalability, personalisation, faster access to cash, and more opportunities for upselling.

Live It offers a white-label ticketing platform and API suite. It works across Europe and North America with the likes of Ultra Europe and Defected Croatia festivals and works on either a premise software or a service as a software (SaaS) model, depending on the client.

Having issued 3.5m tickets to 4,000 events in the last year, the platform's CEO, Kenton Ward, says its offer to promoters "gives them the tools to compete" in optimising revenues. "The D2C model works better and better as time moves on. As better tools and social media mean if someone chooses not to work with a big database-driven marketplace, they don't have to," he says.

Data + money

Hungary's backstage ticketing by Netpositive does white-label ticketing for festivals like Sziget in Budapest, EXIT in Serbia, and Romania's Untold and Electric Castle. Since launch, it has sold over 12m tickets, worth €400m in transactions, and offers RFID wristbands for access control and cashless payments.

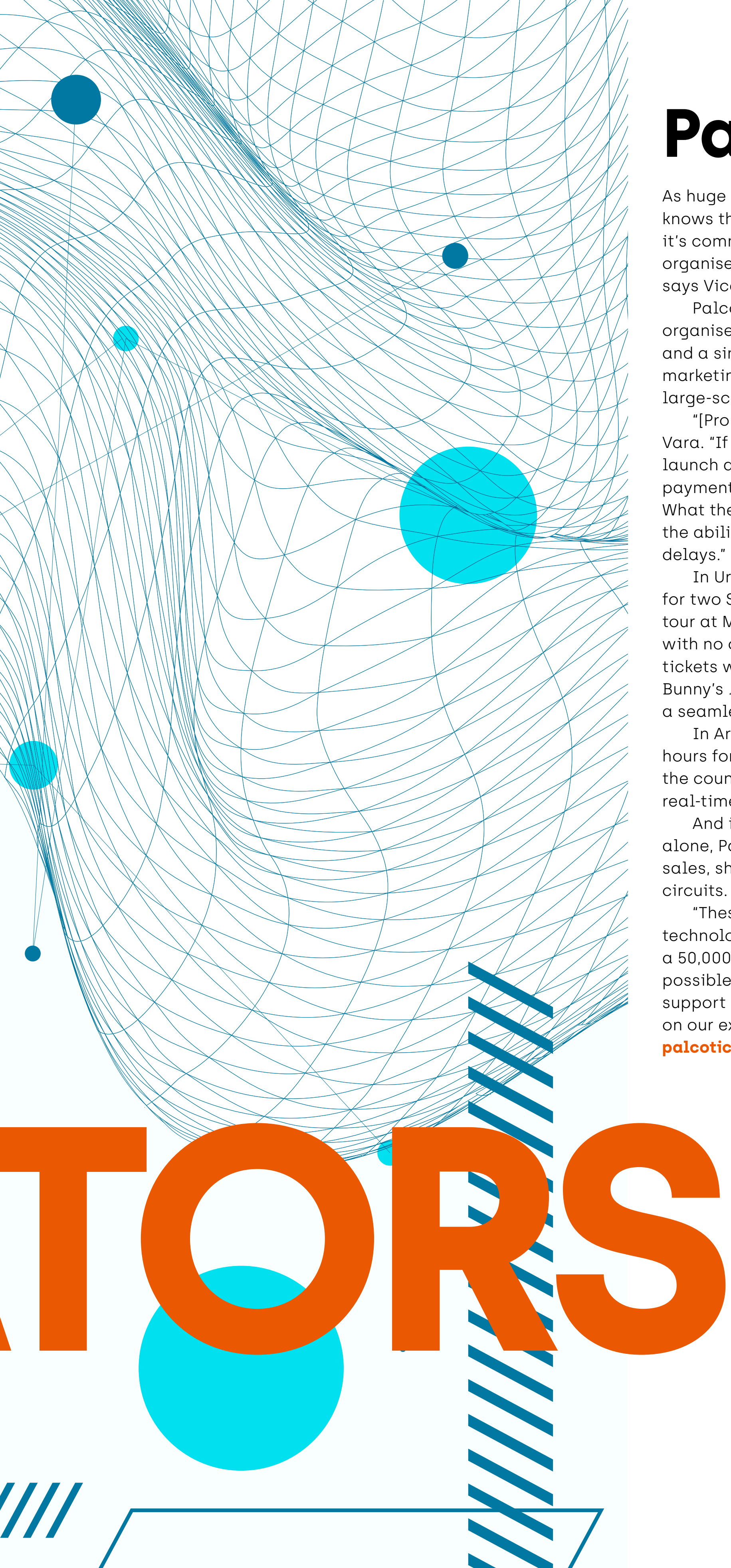
Marketing and business development director András Berta acknowledges that using white-label means organisers must "gear up" their own marketing. But he argues that can be a "selling point" for clients who don't want to give their data away: "Data is the biggest asset."

Chambers agrees that "data is the key battleground" and wanting access to more of what you own "isn't a bad argument" for rights holders. He adds that [rights holders] want to "end the disintermediation that ticket agencies ha brought to the sector."

But he stresses the disadvantages of having insta access to ticketing revenue when using D2C: "Acce is great until the event has to be cancelled or re the artists are taking the money, where are th guarantees to the consumer that it's in an Being the bank isn't necessarily a win, b complications."

The ticketing industry is one of constant inventiveness. Here, we profile some of the companies making waves and bringing fresh ideas to the business.

TICKET INNOVA



Palco

As huge and triumphant as the biggest events get, everyone knows there are perils at certain moments. “In major on-sales it’s common to see systems crash, payments delayed, and organisers losing visibility right at the most critical moment,” says Vicente Vara, co-founder and CEO at Palco Ticketing.

Palco’s solution is a white-label platform that gives organisers control: instant payouts, stability under pressure, and a single dashboard to manage sales, access control, and marketing – equally adapted for an international tour, a large-scale festival, or a smaller local venue.

“[Promoters] are tired of depending on third parties,” says Vara. “If they want to adjust prices, open new sections, or launch a promotion, they often have to wait. On top of that, payments arrive late and high commissions reduce margins. What they are really looking for is autonomy, reliability, and the ability to operate under their own brand without friction or delays.”

In Uruguay, Palco sold more than 86,000 tickets in 48 hours for two Shakira concerts on her *Las Mujeres Ya No Lloran* world tour at Montevideo’s Estadio Centenario – a double sold-out with no crashes or errors. In the Dominican Republic, 59,000 tickets were sold in just eight hours for two concerts from Bad Bunny’s *DeBÍ TiRAR MáS FOToS* Tour, with instant payments and a seamless buying experience.

In Argentina, Palco did over 200,000 tickets in less than 20 hours for TINI’s Futttura Tour, marking the biggest on-sale in the country’s history, powered by Palco’s virtualqueue and real-time anti-fraud protection.

And in Mexico, across regional Palenque tours this year alone, Palco has already powered more than 300,000 ticket sales, showing that it is just as effective in regional and local circuits.

“These milestones show what defines Palco: a scalable technology that works just as well in a 500-seat theatre as in a 50,000-capacity stadium,” says Vara. “And all of this is possible thanks to our methodology, where we actively support clients during their on-sales and advise them, based on our experience, on the best actions to take at every stage.”

palcoticketing.com

Market profiles

Welcome to the new-look market profiles section, where we provide a snapshot of the ticketing landscape in almost 70 markets worldwide.

On the following pages, you'll find at-a-glance facts and figures – from population and GDP per capita to Internet penetration and phone connections – alongside an overview of the key primary ticketing companies in each country, the status of secondary ticketing, and leading white-label and D2C platforms, where relevant.

The profiles also include a market summary outlining the current business climate, notable developments over the past 12 months, and major trends shaping ticketing in that territory. Where possible, we've highlighted significant live music news, infrastructure changes, and the technologies gaining traction.

Primary ticketing companies are listed alphabetically. This is because market-share data can be difficult to verify, with different operators measuring in different ways and some keeping their data strictly confidential.

Reflecting the growth of D2C ticketing, we've noted where specialist D2C platforms are active. While most primary ticketing companies now offer these services as part of their broader proposition, we've listed standalone operators in relevant markets that focus solely on direct sales.

The result is a concise reference guide for anyone needing a quick but informed overview of how ticketing works in each country or region – whether you're an international promoter looking to tour new territories, a tech provider assessing market opportunities, or simply curious about how live events are sold around the world.

From fast-maturing markets with sophisticated tech ecosystems to regions where mobile payments are leapfrogging traditional infrastructure, these profiles reflect the diversity and dynamism of global ticketing today.

Africa

Egypt

Population: 111.2m
Currency: Egyptian pound (EGP)
GDP per capita: $16,700
Internet users: 96.3m
Active phone connections: 116m

Key primary ticketers:
Collard Tickets, TicketEgypt (owned by Venflare), TicketsMarche

Secondary ticketing:
Egypt does not have any secondary ticketing legislation.

Taxes & charges:
VAT: 14%; 5% tax on all event tickets

The ticketing business in Egypt is dominated by domestic sports events, and many ticketers work across both sports and music. The nation's live music scene saw a downturn last year as international tours steered clear amid the ongoing Israel-Gaza conflict. Still, major acts such as Maroon 5 and The Black Eyed Peas still performed, and domestic demand remained strong, led by artists such as Amr Diab. And things are rebounding fast in 2025: Live Nation Middle East and TicketsMarche have partnered with the Administrative Capital for Urban Development to stage over ten major concerts this year in Egypt's new administrative capital city, including at the newly opened 94,000-capacity NAC Stadium, and TicketsMarche recently secured the ticketing rights for RiseUp Summit 2025, the region's largest tech and entrepreneurship conference.

Nigeria

Population: 236.7m
Currency: Nigerian naira (NGN)
GDP per capita: $5,600
Internet users: 107m
Active phone connections: 150m

Key primary ticketers:
Ariiya Tickets, cene.xyz, Quicket (owned by Ticketmaster), Tix Africa

Secondary ticketing:
Secondary ticketing is legal here.

Taxes & charges:
VAT: 7.5%

Nigeria's live entertainment ticketing scene is growing fast, with platforms like Sytiicks, Tix Africa, and Tickets by Selar leading the charge. While Tix Africa made headlines in 2025 with a slick "Pay with Kuda" feature, allowing seamless card-free payments, Syticks has emerged as a top full-service option for events nationwide. There's still no formal resale market, as most people simply resell tickets informally through friends. On the infrastructure front, work began on a 4,500-capacity venue in Abuja, while plans remain for a Live Nation-OVG-Nigerian investors arena in Lagos. Overall, Nigeria's ticketing industry is maturing, driven by better tech, mobile payments, and a steady rise in live event culture across major cities.

Rwanda

Population: 13.6m
Currency: Rwandan franc (RWF)
GDP per capita: $3,100
Internet users: 4.9m
Active phone connections: 13,3m

Key primary ticketers: ticqet.rw

Secondary ticketing situation: No formal secondary resale marketplace exists; occasionally, resale happens informally via personal or social networks.

Taxes & charges: VAT: 18%

Rwanda's live event ticketing scene is led by Ticqet (operated by Centrika), the exclusive partner for BK Arena and Zaria Court, with newer platforms like Rwanda Events, Sinc, and HustleSasa supporting local organisers. Payment options are increasing – Ticqet is integrating various mobile-money systems like MTN MoMo, Airtel Money, and Visa/Mastercard, and is also working with payment processors. Digital is growing, too; BK Arena now has digitised entry, and the government continues to push for e-ticketing, especially in sports, with several federations issuing online ticketing tenders. Major venues like BK Arena, alongside growing infrastructure and demand, are driving capital Kigali's rise as a pan-African entertainment hub.

South Africa

Population: 60.4m
Currency: South African rand (ZAR)
GDP per capita: $13,700
Internet users: 50.8m
Active phone connections: 124m

Key primary ticketers:
Appening, Computicket (owned by Shoprite), Howler, Pocketplan, Quicket (owned by Ticketmaster), Ticketmaster, Ticketpro, Tix Africa, Webtickets, Zishapp

Secondary ticketing:
While there isn't specific legislation in place banning ticket touting in SA, it is usually prohibited in the terms and conditions of primary ticket sellers.

Taxes & charges: VAT: 15%

South Africa's live music market is rebounding despite ongoing economic challenges, buoyed by major infrastructure and tech-driven ticketing developments. Ticketmaster, which opened in the market in 2022 and acquired self-serve Quicket in 2024, now powers 95% digital ticket delivery, while Webtickets has adopted dynamic pricing and partnered with in-store retailers. Local genres still dominate the market, but there's been an uptick in demand for international acts despite limited consumer spending; Calabash festival has expanded, US festival Milk & Cookies debuted in January, and Travis Scott plays Johannesburg in October. A major development recently was the opening of The Dome (10,500 cap), South Africa's largest purpose-built arena, to serve as a "hub for local and pan-African talent." The venue is a partnership between Live Nation-owned Big Concerts, Stadium Management South Africa, and Gearhouse SA.

John Legend at The Palms in Lagos, Nigeria

Switzerland

Population: **8.9m**
Currency: **Swiss franc (CHF)**
GDP per capita: **$82,600**
Internet users: **8.9m**
Active phone connections: **10.9m**

Key primary ticketers:
CTS Eventim, Eventfrog, See Tickets (acquired by Eventim), Ticketcorner (joint venture between CTS Eventim and Ringier), Ticketmaster

Secondary ticketing:
There are no laws specifically relating to secondary ticketing in Switzerland.

White label/D2C companies:
Secutix, Smeetz, vivenu

Taxes & charges:
VAT: reduced rate of 2.6% for cultural events

Switzerland's ticketing market may be small but it's fast-moving and fiercely competitive – however, the multilingual landscape, short-term buying habits, and market saturation remain challenges. The "big four" became three in 2024 after CTS Eventim acquired See Tickets. But Ticketmaster holds strong, boosted by Live Nation ties and success in sports, while Eventfrog continues to grow among smaller events, adding AI tools and absorbing Eventbooster to expand its reach. Digitisation is thriving, with nearly 90% of tickets now mobile or e-tickets, with TWINT leading in payments. Secondary ticketing is evolving, too: Viagogo settled a legal case in February 2024, prompting greater transparency, while platforms like fanSALE offer face-value resale options. And demand continues to grow; this year's Paléo festival (a Secutix client) sold out in 13 minutes, while Switzerland's first K-pop arena show, by boy band ATEEZ, sold all 15,000 tickets in January.

Türkiye

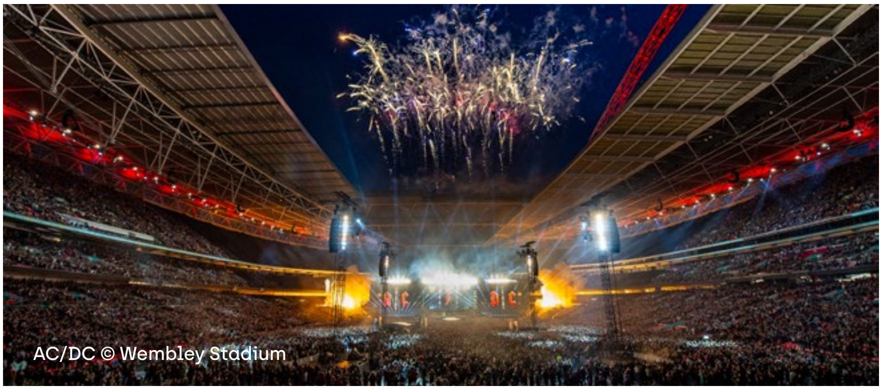
Population: **84.1m**
Currency: **Turkish lira (TRY)**
GDP per capita: **$34,600**
Internet users: **77.3m**
Active phone connections: **80.7m**

Key primary ticketers:
Biletix (owned by Ticketmaster), BUGECE, iTicket, Mobilet, Passo

Secondary ticketing:
There are currently no laws relating to ticket reselling in Türkiye since scalping and resale are not such an issue there.

Taxes & charges:
VAT: standard rate of 20%

Türkiye's live music scene remains a tough market – inflation, along with well-documented sociocultural and political turmoil, still weigh heavy. But while mid-tier indie and rock shows continue to struggle, 2025 saw international stadium tours resume in force; Justin Timberlake, Halsey, Robbie Williams, and Jennifer Lopez all scheduled Istanbul dates. Ticketmaster (as Biletix) dominates primary ticketing, while rivals like Passo, iTicket, Mobilet, and BUGECE hold niche ground; Passo's blockchain rollout marks a major tech shift. On the resale side, demand is low, except for football, where Viagogo and TicketSwap are active. While the likes of Ticketmaster innovate with Spotify-integrated sales, brand tie-ins with Turkish Airlines and McDonald's, Refund Protect insurance, various infrastructure projects – such as the new 20,000-capacity entertainment and sports arena in Bodrum, due to open in 2027 – should provide a much-needed boost to live entertainment.



AC/DC © Wembley Stadium

UK

Population: **68.5m**
Currency: **Pound sterling (GBP)**
GDP per capita: **$54,500**
Internet users: **67.8m**
Active phone connections: **88.4m**

Key primary ticketers: AXS, CTS Eventim, DICE (owned by Fever), Fever, Gigantic (owned by DEAG), See Tickets (owned by CTS Eventim) Skiddle, Ticketek (owned by TEG), Ticketline, Ticketmaster

Secondary ticketing:
Currently legal. The government are considering a cap on resale prices, which is backed by the industry.

White label/D2C companies:
Eventbrite, Music Glue, SeatGeek, Tixly, TicketSellers (owned by Citizen Ticket), Ticket Tailor

Taxes & charges:
VAT: 20%; fees: up to ~20%

With many competing operators, the UK ticketing market remains one of Europe's feistiest, but it faces growing scrutiny amid consumer frustration over dynamic pricing and resale. Ticketmaster is the largest ticketer by volume, offering features such as social media integration and a dedicated service for local gig discovery. Consolidation continues, with CTS Eventim acquiring See Tickets in 2024 and Fever buying DICE in June. Meanwhile, AXS continues to expand – adding to its existing longstanding deal with The O2 arena, OVO Arena Wembley, P&J Arena, and others through the acquisition of the Ticket Factory in 2024, giving it Birmingham's arena portfolio. It als
added ABBA Voyage. Independent
company Ticketline is offering a
updated ticketing platform,
offer a broader suite of o
promoters, including m
Despite economic p
live entertainmen

FILLING VENUES
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