

The Secondary Market for Tickets (Music and Sport) Qualitative Research Report

**Prepared for: DCMS
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I. **Background and Research Objectives**

1.1 **Context**

DCMS required a clear and informed view from consumers interacting with the secondary ticket market in the UK. In particular, following recent escalation in secondary market activity and pressure for action from Government from various interested parties, a desire was expressed to understand general public perceptions and experience in relation to ticket touts and touting practices.

Research was also requested to help inform discussion with industry stakeholders as part of this study and ahead of a summit on the subject of touting and the secondary market in February 2007, and to provide the basis for Ministers to take a view in relation to this area.

An OFT study in 2005 suggested that there could be public interest benefits in the secondary ticket market, but, equally, there were felt to be concerns and potential downsides. Accordingly, the commissioning of this research was also intended to provide understanding and evidence that might suggest the need (now or in the future) for Government action to limit, control or outlaw ticket touting in the secondary market.

1.2 **Research Objectives**

In summary, the objectives of this study are:

- To provide evidence and qualitative data for DCMS in its formulation of policy and position about the secondary market for tickets.
- To understand the ways in which the general public feel/experience advantages and disadvantages due to the existence of touts and the secondary market.
- To provide an initial view as to the requirement for Government intervention/regulation in the context of the general public experience.
- To highlight areas to 'watch' and recommend ways of research-monitoring developments, especially regarding the internet, in relation to the secondary market for tickets.



II. Sample and Methodology

A programme of qualitative research was carried out, involving three stages:-

A) **A review of existing research and related documentation.** Fifteen documents were considered and fed into structuring and developing material for consumer research, as well as the information build towards findings. The largest and most significant background document was the OFT report 'Ticket Agents in the UK', January 2005. Other documents included:

- Notes of April and July 2006 ticketing summits;
- Statement of Principles for summit members to sign up to;
- Poll results - eBay, NME and Newsbeat;
- Sports' dossier on ticket touting problems;
- Society of Ticket Agents and Retailers (STAR) discussion paper and draft terms and conditions; and
- BBC News pages relating to touting, Krystals Box Office and 'A Concert for Diana' tickets

B) **Eight, 30 to 40 minute telephone depth interviews**, conducted with representatives from:

- AS Biss
- Rugby Football Union
- Scottish Consumer Council
- SJM Concerts
- Society for Ticket Agents and Retailers
- Which?
- Seatwave
- Bath University (academic business study group)

C) **Eight group discussions amongst a cross-section of the general public.** This 'public' sample comprised the most significant and **prioritised** element of the study. The group discussions were conducted for one hour with six respondents and were structured as follows:

| | | |
|---------|--|------------|
| Group 1 | Mixed, 18-23 years Students, no children (ABC1) | Hove |
| Group 2 | Mixed, 20-30 years Single, working, no children (C1C2D) | Nottingham |



| | | |
|---------|--|------------|
| Group 3 | Men, 25-35 years With/without children REGULAR TICKET BUYERS (BC1C2) | Nottingham |
| Group 4 | Women, 25-35 years With/without children REGULAR TICKET BUYERS (BC1C2) | Hove |
| Group 5 | Men, 30-45 years With children REGULAR TICKET BUYERS (BC1C2) | Hove |
| Group 6 | Women, 30-45 years With children REGULAR TICKET BUYERS (BC1C2) | Nottingham |
| Group 7 | Mixed, 40-55 years Parents/non-parents/empty nesters (ABC1) | Nottingham |
| Group 8 | Mixed, 40-55 years Parents/non-parents/empty nesters (C1C2D) | Croydon |

Notes on the General Public Sample

- All participants were deliberately selected as relatively 'active' ticket-buyers. It was felt that greater understanding of the issues, perceptions and experiences of ticket buying and the secondary market, would emerge in the context of such a sample; it should be noted, though, that they may not be typical of the public at large. All were recruited as having purchased tickets four or more times in the past year, for at least two different types of event (music, sport, theatre). In practice, many had purchased more than this, over the last year, and around a quarter had **sold** tickets on the internet or outside venues.
- All had access to, and reported using, the internet 'most days'.
- Fifty per cent were recruited on the basis of having purchased tickets online; in practice, nearly 100 per cent had done so.
- By specification, two per group had 'knowingly' bought or sold tickets via sources other than the box office. Again, in practice the percentage was higher. Sixty per cent had used other sources and in the researcher's opinion, around 10 to 12 individuals (out of 48) had sold tickets on the internet, by advertising or at the door/in the street prior to an event, evidenced by comment, allusion and/or open description.



Timing and Personnel

The three research stages were conducted between December 18th 2006 and January 26th 2007. A verbal debrief of key findings and submission of conclusions were given to DCMS officials on February 1st and February 2nd 2007.

All executive and analytical work was conducted by Rosie Campbell, Director, Campbell Keegan Ltd.



III. Summary and Conclusions

Objectives:

- The research focused on - and privileged - the attitudes, understandings and experiences of the general public in ticket buying (and selling) and their described encounters with the secondary markets.

Key findings:

- This sample of consumers, though probably more engaged with live entertainment and sport than the population at large, were enthusiastic and motivated in attending live events and trends indicated that people were increasingly inclined and likely to buy tickets and travel (often far afield - frequently another British city) to see/support live acts and sporting fixtures. The more 'time-rich' could indulge enthusiasms, the more 'cash-rich' could pay to make a night or weekend of such outings. 'Treats' of live entertainment/sporting events were increasingly seen as 'everyday', important enrichments of leisure time and signals of a good quality of life.
- In the main **there was little or no spontaneous complaint about pricing levels or availability of tickets**; however, there was a widely-acknowledged recognition of the 'facts of life' where popular bands or teams were much sought after and tickets for appearances likely to be expensive and difficult to source.
- Where consumers described disappointment in accessing tickets there was often a **belief that they had, themselves, failed** - been too slow, not 'got their act together', failed to notice pre-publicity, been 'unimaginative' about sourcing, etc. Very rarely, in the instance of very popular and 'expected-to-sell-out' events was there resistance to getting tickets on the basis of (high) price alone.
- Interestingly, there is - especially amongst men - a palpable enjoyment expressed in the **process of tracking down and sourcing, particularly 'rare', tickets no matter what the price finally paid**. Internet searching, acquaintances and 'contacts' as well as agent listings present ways to research and source such tickets. Consumers express real satisfaction in the acquisition of hard-to-get tickets, the final 'quarry' of the - enjoyable - hunt itself.
- **The most significant circumstances in which there was spontaneous criticism** of the search and sourcing process, related to **children and families** where there was felt to be a number of factors inhibiting access - the need for **considerable overall expenditure, often by just one adult** (children generally needing to be accompanied), the 'prohibition' of acquiring tickets where purchase was limited to two or four at most, and the generally less accessible processes that might be necessitated, such as manning a phone or refreshing an internet site at a 'difficult' hour of the day and requiring



a credit card, to have any chance of ticket purchase.

- All these experiences notwithstanding, most consumers are aware that there is, if not illegality, then certainly ‘roguishness’ out there in the tickets for live events marketplace. Stories of touting misdemeanours are familiar and mythologised. However, the vast majority of this sample, typically, felt that the marketplace operated competitively and fairly - but that as a live event punter you sometimes needed to be ‘clever’ and it served you well to have your wits about you when looking to purchase highly popular event tickets.
- **In practice there is wide confusion about what is, and what is not, legal or within, or outside, promoters’ or agents’ Terms and Conditions.** Indeed, a ‘double standard’ operates to some degree based on the ‘greyness’ of understanding of regulations in this area. Typically (and affirmed in two of the recent polls including the NME and ICM submissions) people often ‘disapprove’ of touts and/or people selling tickets with the express intention of making a profit, yet are happy to admit that they do just this themselves.
- Again, at the level of common and operational understanding, consumers are inclined to view tickets as **acceptably transferable** (at least not something you would get into trouble about), that **(re) selling at a profit is also acceptable so long as it is done in a small-scale fashion and by ‘individuals’**.
- There is, though, the belief that **‘touting’, misrepresenting and/or selling tickets you don’t have, or which have not yet been released, is either illegal or, at least, potentially ‘immoral’¹.**
- The ticket marketplace is not seen, as those in the industry construe it, as ‘primary’ or ‘secondary’ based on authorisation/regulation by promoters, but rather, more simplistically as **‘honest, real, official’** versus **‘dodgy, fake, invalid’**. Touts, agents, other individuals or classifieds can be the source of either category of ticket, in consumer understanding and experience. Only the ‘Box Office’ is tantamount to certainty where ticket validity is concerned.
- Safeguards believed to maximise the chance of getting ‘real’ tickets are **familiar names** in sourcing (which basically amounts to ‘well-known’ - such as Ticketmaster, SeeTickets, even eBay where there is felt to be a familiar ‘trading friend’) and, above all, using, or intending to use, the **Box Office** (real or virtual).

Recommendations

- Many believe there is no role for further regulation and are particularly cynical about Government intervention in this marketplace. Widely, people believe that the Government is, itself, ‘on the make’ in the sense that its only concern would be to raise revenue and/or ‘hector’ a beleaguered population in a ‘nannyish’ fashion.

¹ Also known as ‘futures’. This kind of practice is advertising for sale tickets that the seller could not possibly have in possession or bought yet, due to the fact that the tickets have not been released



- Stakeholders of a spectrum of persuasions agree that the Government position on secondary ticket selling is **unclear** and would, welcome (any) expression of clarity, ideally against (expressed) objectives.
- The consumer angle, at the moment, suggests that:
 - **There is scope to create better understanding for people about what they are buying when they purchase tickets;** more information, at an earlier stage in the purchase process (in advertising/on sites) about total cost and entitlements, and if relevant (in highly regulated, e.g., football/rugby match ticket sales) highlighting the danger of voided tickets if sold in contravention of tickets' terms and conditions.
 - **Specifically, clarity about what is, and what is not, acceptable and/or legal would be appreciated by consumers in relation to transferability and selling on.** As most consider the right to transfer and/or sell on (small scale) as totally reasonable, and a practice many either do, or would be happy to do, it is suggested that this should be more actively 'permitted'.
 - Alongside 'legitimation' of small-scale selling-on of tickets, more 'ethical' reinforcement of existing laws and decrying of definitely illegal or 'unfair' trading practices would help to isolate more worrisome and extreme profiteering activities; **over-purchasing by dishonest use of false identity and futures selling, in particular, are activities which consumers see (and feel to be) unacceptable and unfair.**
 - **Specifically, imaginative promotion of ways to improve accessibility and affordability of (especially popular) event tickets for families and children** would have popular support amongst both the industry and general public and sit well with expressed Government policy.
 - Working with promoters and ticketing agencies, there is also mileage in looking to develop more secure, ID-based (N.B. Glastonbury 07) and/or 'ticketless' passes for events to improve security, control and democratise access - particularly for events aimed at young people and students - who are internet-savvy and increasingly used to airline ticketing models and text communications.
 - Overall, and from the consumer standpoint, maintaining and 'policing' this marketplace through **education and cultural/attitudinal change** is likely to be better received and more workable than legislative or 'bureaucratic' manipulation. Tonally, a notional '**Buy real**' campaign/message will be more motivating and relevant to the general public, alongside **positive** suggestions for avoiding disappointments and fraud, than would 'negative' communications about 'what you are not allowed to do'.



IV. Detailed Findings

1. Background

1.1 Live Events: Attending

Attending live events has become a significant and enriching element in many people's lives. There are a number of factors felt to reinforce the habit of 'live event' attending:

- **Increasing affluence and greater preparedness to spend on oneself;** 'treats' as part of the everyday pattern of a good lifestyle, a "civilised" quality of life:

"I'm quite embarrassed how much I spent on tickets last year. It must be in the hundreds ...!"

- **A generational shift;** the economically-active under 50s generation have 'grown up' within a popular music culture with concert-going at its core.

"I went to bands from the age of 15; it's just what I go to that's changed."

- **Flexibility and widespread communication access.** People 'hear about', read about, or notice advertising for a plethora of live events; the scope for indulging an enthusiasm for a band, football team or even theatrical style has never been greater. Football teams and bands, in particular, have become significant 'hubs' for the expression of taste, style, passion:

*"Man U is a religion to quite a lot of people. It's not like **choosing** to go ... you just follow your team. You go to watch them."*

So, overall, where there is sufficient enthusiasm, time and money, attending live events is felt to be important and rewarding. The two significant 'reinforcers' - keeping people coming back for more - are:

- **Preparedness to travel** ... often significant distances (with affluence feeding mobility). Respondent descriptions give the impression that a significant journey to see a (much loved) team or band, is also something of a 'pilgrimage', can be an adventure in itself and builds a 'package of pleasure':

"I wouldn't think twice about booking Manchester or Birmingham NEC to see them."

(Nottingham resident)

Indeed, the availability of cheap flights/transport and package deals has led to many "making a night or a weekend of it".

- **The live atmosphere** ... this, by many accounts, is the indefinable, but most important and reinforcing ingredient in the attending experience. Some respondents even suggested that it was in response to more individual/solitary (screen/TV) based entertainment patterns that the 'big event', live show or match really came into its own as exciting, both in terms



of spectacle or content, and in terms of the *“feeling of being in a crowd of supporters.”*

“There’s just nothing like the feeling, you’re dancing and singing, you feel possessed.”

“On the terraces ... if you’ve been there, you know ... it’s being in amongst the crowd that gives me the greatest hit really.”

1.2 Live Events: Awareness

The way in which consumers get to know of events and ticket availability is varied. In general, though, many people feel that they ‘hear about’ far more potential live entertainments and sporting events than they used to. High media exposure for tours and prestigious matches/ bands has its benefit (the chance to attend) and its detraction - the *“foregone conclusion”* of almost instant sell-outs ...

Of the awareness channels for events/tickets, **peers** (*“hearsay in the pub, basically”*), **mailings and ambient promotions** (direct marketing which ‘finds’ audiences), **press advertising** (especially local daily paper event listings and weekend, dedicated supplements) were all frequently mentioned:

“In the Sunday papers I probably nearly always have a look to see what’s coming up.”

“In London you’ve got Time Out.”

“(Though I hate it) ... NME does give you advance notice of tours and things.”

“I tend to look outside the venue, ones in Nottingham like Rock City or Rescue Rooms.”

“Friends ... only trouble is I always seem to be the last to hear about someone who’s touring ...!”

“Say for like the Killers concert ... (once I’d heard when they went on sale) ... I went and queued at the Arena.”

Significantly, though, the **internet** is, for many people, the most important - and increasingly, the definitive - source both for pro-active searching and, by dint of browsing behaviour, for ‘incidental’ awareness-raising as far as musical, sporting and theatrical events are concerned. This leads to a significant amount of reported ‘impulse purchasing’ of tickets.

“Sometimes I might be looking at Nottingham Evening Post website and I’ll see that some concert’s coming and that takes me into something and I’ll have a look to see when it’s on ... You might not start off thinking you’re going to book a concert ... but suddenly you’ve ordered four tickets!”



"I tend to look at the venue websites. I'm quite keen on jazz and I'll travel to London (from Nottingham) quite happily, so I look at the Jazz Café website and the Roundhouse to see what's on."

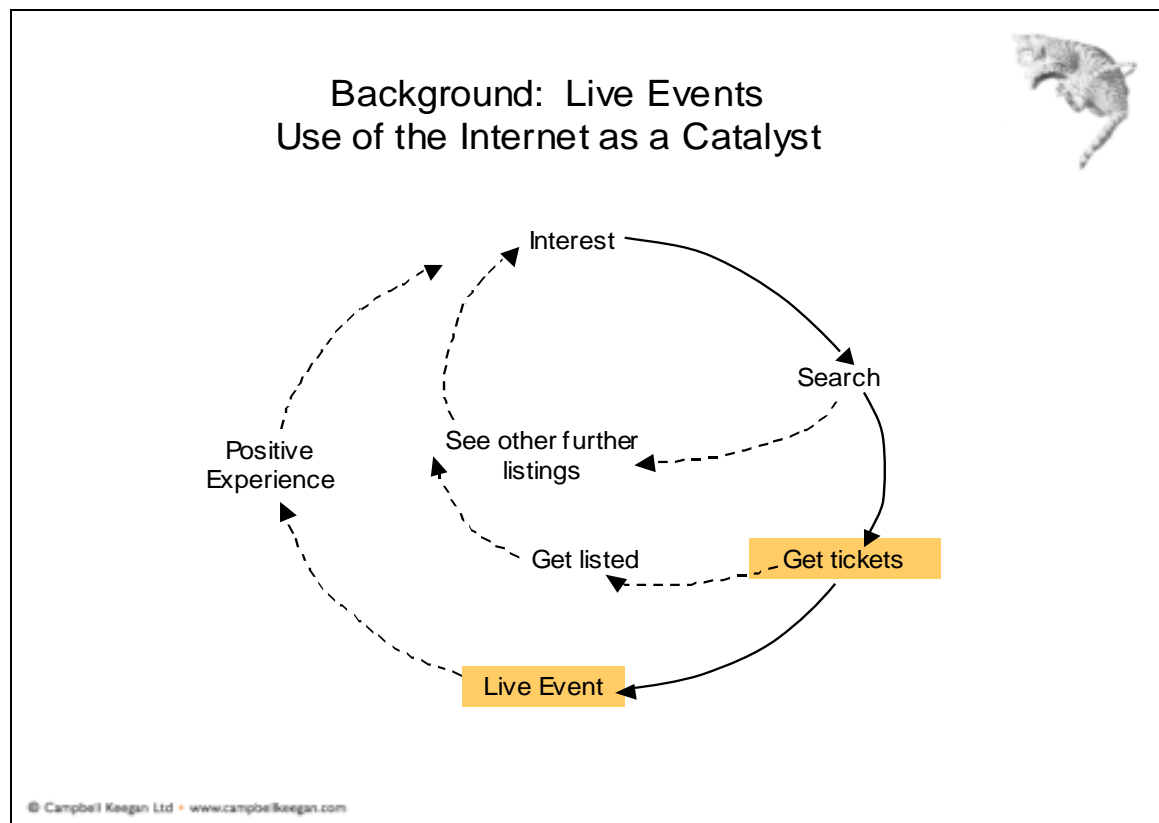
"You just find yourself wandering, on the internet; I get a See Tickets alert thing and find I'm looking at all the other events that are on ..."

This 'wandering' habit catalyses not only the intention to purchase tickets, but also contributes to consumers' uncertainty as to the exact source of tickets (see later).

"Sometimes you feel you've clicked from one site to another, so you're not sure what you're looking at ... yeah, I agree, you sort of just follow leads if it's something you're interested in."

This - growing - use and reliance on the internet as both information and purchasing resource, can, then, become very self-reinforcing, as consumers become alerted to more and different events via (e)mail lists and registered channels, following a ticket purchase from an agent, for example:

"I get Ticketmaster lists ..."





1.3 **Background: Live Events and Lifestage**

There are important differences in the general public's desire to attend, and experiences of attending, live events, perhaps most significantly, based on **lifestage**.

Under 30s

Younger adults without children are often highly motivated towards live entertainment. **Students** (though only represented by one group in this research) are typically **cost-focused**, but **technology-literate**. Interestingly, they often accessed both information and tickets on the internet and there were several examples of 'text code' "*ticketless gigs*" described amongst recent ticket event attendances.

"I spend ages on computers so I'd just start with the internet ..."

"I think e-tickets are good ... and I like the ones where they send you a text. You'll lose a piece of paper, but not your phone."

Though the particular students interviewed felt 'suspicious' of some internet ticket selling sources, notably eBay; they worried about "*paying too much*" or about losing out financially.

In common with many full-time students, their key interests were **music** as far as live events were concerned and combined with a shared desire for good value/ "*bargains*", was a range of eclectic, less well-known and obscure tastes - more readily-satisfied by ticket application than, perhaps, those for high profile mainstream performers:

"I look out for Metallica tickets - and they've a big following ... but I'm also into Switch Blade Symphony!"

Beyond this, students were typically less organised and future-oriented in planning live event attendance, than were older and working adults:

"If I sort this Friday, I'm doing well ...!"

Working under 30s were especially enthusiastic about the 'big event, weekend-away' scenario. They represent, perhaps, the first adult generation with no ties, a degree of spending-power, a culture of preparedness to travel and (relatively) cheap travel fares, for whom entertainment is a priority:

"I saw Take That in Dublin. I go to loads of stuff everywhere - theatre, concerts ... yeah, they were worth the journey to Dublin; I enjoyed the weekend anyway."

"I'm a football fan and I know when they're (matches) on because I put them in my diary. I just go to England matches in the UK."

"I'm like that with rugby. I go to England matches at Twickenham ... a few lads together."



Parents and Families

Clearly, once people settle into partnerships/marriage and have children, the focus shifts, significantly, towards the family. However, attending events can take on a new role for families, exemplifying a 'good quality of life', providing shared entertainment, and, in many instances, 'education':

"It's fantastic going to something with the whole family (has three children). It gives me a buzz if we're all there and the kids really enjoy it."

Such family ticket events are likely to include theatre (especially Christmas shows/pantomimes, etc.) and cinema trips as well as high profile sports events. Fathers exude considerable pride in 'initiating' their children (sons especially) as supporters of favoured football teams:

"I always said I'd take him to Forest as soon as we had him ..."

There is also a discernible trend in parents buying tickets for bands for younger children. In conversation several instances of 'birthday treats' to see bands were mentioned, one for a child as young as nine:

"They want to go and see a boy band - or, like my neighbour, she took her daughter and a group when there was Sugababes."

Regular ticket buyers (and more affluent middle class consumers) as parents, often retain their 'younger' habits, especially in 'girl' and 'boy' groups and may go to live events for 'girls' nights', 'boys' nights', or even weekends ...

"A group of us will go to a match and have a night in a hotel, throw that in too ..."

Where conversation emerges in relation to purchasing tickets for children and family groups, parents do, quite often, spontaneously decry the expense once the desired number of tickets has been purchased ...

"At £30 a shot it's quite a treat if you're taking a family."

Equally, given the need for accompanying adults, parents did feel that there was inbuilt 'discouragement' to the family ticket buyer. Not only might popular events have number-of-ticket limits, and be high-priced, but there is no specific family-focused promotion, no 'discount' or family-friendly seating arrangements in the majority of live event situations. Parents, echoing some of the industry stakeholders, felt that in ticket marketing generally, a more benign, and/or welcoming approach in relation to families might be popular:

"If some events could reserve some seats for family groups when you get these sell out shows or really popular football matches and stuff ..."

Empty Nesters/Older/Retired

Older adults, especially those who had retired, were often - relatively - cash and time 'rich', and could indulge specific live event enthusiasms more fully than when



constrained by family and work commitments. In some cases the (cost) benefits of 'non-peak time' availability, for example for theatre and concerts, was well appreciated.

For some - men, especially - more time for entertainment also meant more time to bargain-hunt and it was notable that quite a few over 50 men relished not merely attending events, but much of the 'search and find' process too. The internet provided something of a 'game' for the dedicated bargain-hunter tracking down hard-to-reach tickets ...

"My husband actually spends hours on the internet ... no, I think he just likes all the searching. He's really proud when he's got some tickets ..."

"Rugby tickets are gold dust ... I got some against France ... I'm not saying how, in the end ... But I can tell you French rugby is in the south and Paris is in the north, so it makes it a bit easier."

Amongst older (over 50s) there were also several reports of **gifting tickets** (research took place just after Christmas) to children/grandchildren and extended families. Tickets had the double advantage of fulfilling the 'generous gift' role for family members from whose tastes one might feel distant, as well as creating a 'get together treat' forum.



2. **Ticket Purchasing**

2.1 **Getting Tickets**

Ticket acquisition was both **planned** and **impulsive**, with the latter described as a growing trend largely facilitated by the internet.

Amongst this sample - who, it should be emphasised, were selected as (likely) disproportionately inclined to purchase live event tickets and (likely) more affluent than the population on average - most respondents had purchased **several** tickets over the past year. Not uncommonly, they couldn't remember all the live event tickets they had purchased, acquired and/or used over a year ...

"Nearly every month, roughly, I go somewhere that I - or someone else - has pre-purchased tickets for."

"I go to everything. I'm a concert nut ... I'd literally go anywhere to see George Michael."

For some people (tangible) tickets themselves had a unique resonance; they could be seen as a 'badge of achievement' *"... and I pinned them up (U2 tickets) so people could see I'd got them."*

They also had a sentimental, souvenir role for consumers and visible 'archiving' by decorating walls, or pin boards with 'special' tickets was described by several respondents:

"I may be a bit sad here, but I've still got most of my match stubs ... and I used to cover my walls in tickets ... they do mean something."

Tickets, evidently, as overtly expressed, **"feel like property"** to the vast majority of consumers ... they are not viewed as 'contracts' or 'licences', but as real, owned and, as such, 'transferable'.....

The Ticket 'Hunt'

As suggested in relation to key groups, many consumers **actively enjoy the challenge and excitement** of ticket searching and acquisition practices. In a sense it is a 'hunt', with tickets the ultimate quarry.

Searching - successfully - for tickets is clearly a competitive game for some - men - particularly. During the focus groups there were numerous 'how I tracked down and acquired' tickets stories, with vocabulary indicating the evident pleasure and pride in the process:

"...(I) punched the air at 5 a.m. when I knew they were mine."

"I nearly gave up, there weren't any anywhere ... but then I got a break on eBay."



"I wanted to see Scissor Sisters, but the tickets were sold out - on eBay they were £100 ..."

Even the purchase price can seem a matter of pride; in one instance men vied to outdo one another with tales of high football ticket prices paid:

"I paid £1000 for a ticket to the final - I didn't go because England weren't in it."

"Yeah - World Cup quarter final in Japan - I paid £400 a ticket. It's probably not expensive in the bigger picture, but it's hard paying £400 for a ticket. It was definitely worth it."

"Oh, £100 - that's easy; a steal, what I paid ... for the last day of the Ashes ... yeah, last year!"

And 'succeeding' in getting tickets can, paradoxically, be made more rewarding because of the difficulties (of price, access, rarity ...)

"It feels like getting new shoes ... it's a feeling like achievement."

Whilst it may seem surprising that there is 'prowess' in relating 'how **much**' was paid for highly sought-after tickets, it is less surprising that consumers also revel in the bargain:

"I got them for less than the face value on eBay."

The feel-good effect of a bargain, of successful tracking down, is perhaps only bettered by the added factor of high risk ...

"I've just gone down and hung out outside one of the jazz clubs I go to and I've got tickets when the reserved guest list doesn't all show up."

Overall, then, whilst there are (see later) downsides involved in a highly active - and relatively unregulated - market in live event tickets, it is noteworthy that for a proportion of the population there is added fun, excitement and pleasure in the **process** of ticket acquisition as well as in event-attending itself.

2.2 The Ticket Purchasing Process

2.2.1 The 'Ideal' Process

Ticket accessing and purchase can be experienced as easy, straightforward and successful. Consumers were most likely to report this kind of experience in relation to the **Box Office**. Both in practice, and in perception, the Box Office was a source that connoted reliability, official status and efficiency. In an 'ideal world', most would start there. However, people also acknowledged that a variety of factors might make the Box Office experience unsatisfactory or impossible:



- You might not start from there; internet-browsing, for example, could have led/ended elsewhere
- Responding to an ad could mean the 'source' was different/secondary/unclear
- The event might be (officially) sold out ...

The 'Box Office experience' - the 'ideal' sought in the first instance by many - was favoured as being most likely to render tickets and **least likely to incur additional or unforeseen costs**:

"You don't get all those things like booking fees, carriage and what not."

Buying from a box office could be in person, by phone or via the internet. Increasingly, consumers felt they favoured the online option - because it gave them time and access flexibility and - in many cases - because they could reference visuals of the venue and seat layout:

"I like to click on the seats I want - that's the best way of knowing you're buying the seats you want."

There were, though, also positive examples of in-person visits and telephone bookings:

"I think I phone with my credit card. I like speaking to a person ... I've always done that ... they send them, or you can pick them up at the Playhouse. Either is okay."

With the plethora of advertised ticket sources and the increasing habit of 'surfing' on the internet, it is noteworthy that there are quite a few instances where consumers either **didn't know/had forgotten** the source from which they made the final purchase, or were 'surprised' when tickets arrived:

"I assumed it was the box office, but when the tickets came they had something else on them."

Overall, then, a belief in the 'ideal' of the Box Office purchase exists, but in practice there is some confusion about the nature and 'authority' of actual ticket sources.

2.2.2 When Ticket Purchasing is Problematic

There are occasional, spontaneous reports of frustration and 'less-than-ideal' ticket purchasing scenarios.

Most simply, consumers expressed frustration and irritation at '**missing the boat**', especially where highly sought-after tickets were concerned. Notably, though, on initial mention/discussion, these disappointments were generally described in terms of being "**my fault**".



There was widespread belief - and acceptance - that popular sporting events/gigs **would sell out fast** (... and the scarcity/search challenge could even promote the 'value' of the prize - see earlier).

Only when prompted, and once the discussion widened into a conversation about 'the market' did ticket-buyers routinely cite possible unfair, blocking or illegal purchases (by others) as being causal to their own failure to get tickets:

"You have to have your wits about you. I make a note in my diary and I get to the phone or go on and refresh the site regularly ... I've got tickets like that, yes."

"Like the Band Eight, I just put in like the rest and it's really a bit of a lottery - I was lucky."

"You can't mess about. I always know I can shift an extra two tickets so if they let you I go for four straight off."

"I've missed so many tickets. I'm really hopeless. I've got friends who always get their act together. It's lucky I have, otherwise I'd never see a band!"

Criticism of **high price** related to ticket purchasing dissatisfaction, was a more complex issue. In the main there was 'resigned acceptance' that popular live events commanded a premium, and where sought, most real enthusiasts/fans were undaunted by price. However, there were - as noted earlier - specific complaints in relation to families/children where there was a 'double hit' effect, one adult needing to purchase multiple tickets.

It is to be noted, however, that where multiple purchasers in this sample complained of high unit prices, these respondents were all (relatively) well-off, high level ticket purchasers. It can be reasonably speculated that complaints about the 'exclusion' effect of high pricing might be more significant amongst a less well-off sample of irregular/never ticket buyers. Thus pricing may, to some degree, be selecting audiences by wealth and 'fandom':

"I've given up on tickets at £100 for, was it Kaiser Chiefs? ... one of life's sad facts - it's a market, let's face it."

"You decide if you think it's worth it ... The Sound of Music ... need to be looking eight months on. Can't remember what I coughed up for four. I think I've chosen to forget... and we'll be up for travel on top ..."

Again, as the conversation widened, the 'overall price' issue arose in most groups and - perhaps inevitably - annoyance was mentioned at booking and other initially 'invisible' fees which could be levied on telephone/internet bookings. Most felt, as with any goods, this was a matter of 'accepting', versus the convenience of access, or 'avoiding' by better search and comparing practices:

"With See Tickets they don't charge such a high booking fee. But I tell you what, they are all trying it on. I was asked if I wanted insurance the last time I booked some tickets. I think it was insurance."



Late despatch - or worse, no shows - for purchased tickets was, again, seen as a matter of 'caveat emptor'. Risks associated with more informal purchasing such as via non-authorised sites like eBay were **generally regarded as just that: inherent risks, taken "with your eyes open"**.

Wrong, poor or disappointing seats did arise spontaneously as a criticism related to ticket purchasing, but pretty much all respondents felt this was a matter of 'carelessness' by the buyer. One or two instances of misrepresentation were, though, cited in relation to eBay:

"My friend at work got sent the wrong seats. Nothing like what he thought he had."

Most commonly, the 'invalid' ticket was associated with on site (outside venue) touts and there were a number of 'hearsay' stories of fraudulent practice in this respect; only one of the respondent sample admitted *"being fooled"* by a tout (who 'sold' her the receipt accompanying a ticket batch instead of a ticket).

"Basically, if you're not happy with your tickets it's because you didn't really check the offer."

To summarise, then, spontaneous 'problems' reported in relation to ticket acquisition rarely focused on touts or the secondary market per se. Rather, ticket purchasers were inclined to self-blame.

However, the specific area of family/child ticket access did arise as problematic and punitive; against the spirit of trying to encourage/widen access for any/all possible consumer groups:

"To book seats for something popular for four of us - I've been trying to get the Sound of Music - costs a fortune, you're looking at over £200 and that's just the seats, before the travel."

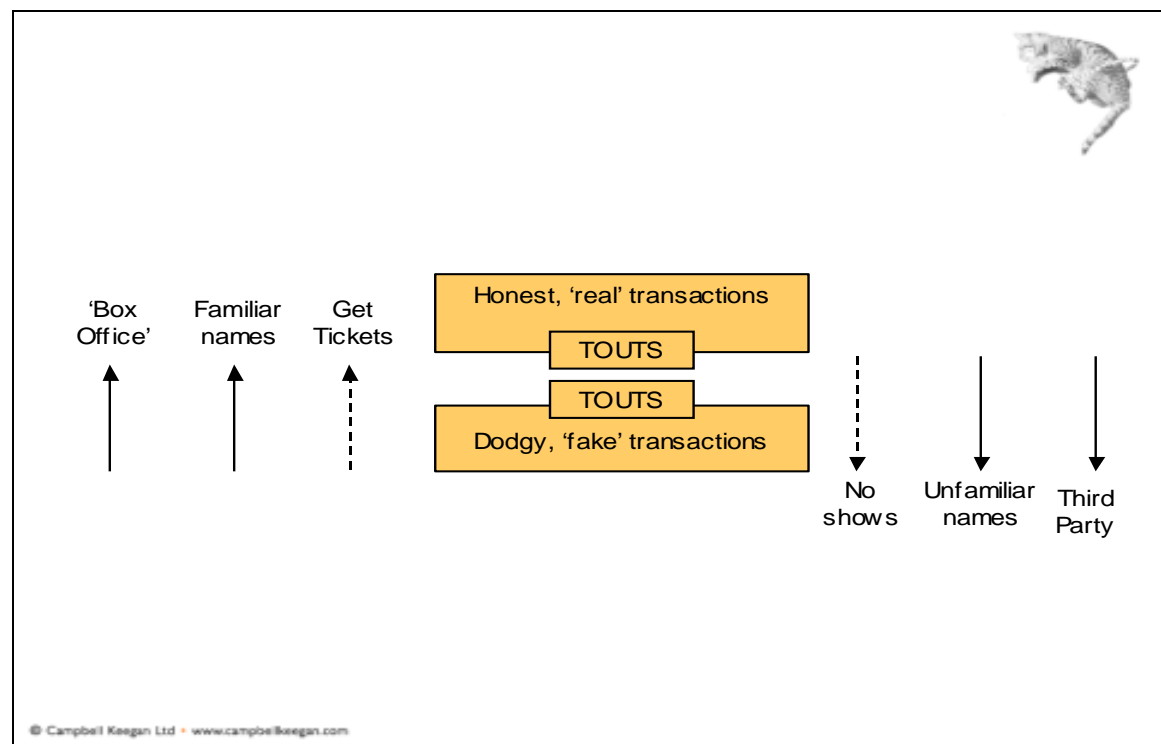
"I ended up getting two tickets in the wrong supporters' bit for my son and his friend at Man U ... just the price and the difficulty of getting them."



3. Agents and the Secondary Market

3.1 How Consumers Categorise the Market

For all respondents there was no clear understanding - and certainly no spontaneous expression - of the difference between primary and secondary market places for live event tickets. Indeed, the key picture for consumers was of multiple sources, often inter-connected. The 'model' of understanding can be diagrammatically described as below:



In broad terms, consumers view ticket sources as **honest/real** or **dodgy/false** with very practical, as well as image/perceptual, factors contributing to categorisation:

- Tickets turning up versus 'no shows'
- Familiar (well-known) versus unfamiliar supplier names
- Box Office (as evident) versus 'another party' (again largely judged on name of source/name on tickets)

The issue of 'touts' - which consumers do spontaneously mention - is, potentially, connected to either/both 'honest' and 'dodgy' ticket transactions.

3.2 Touts - In Consumer Eyes

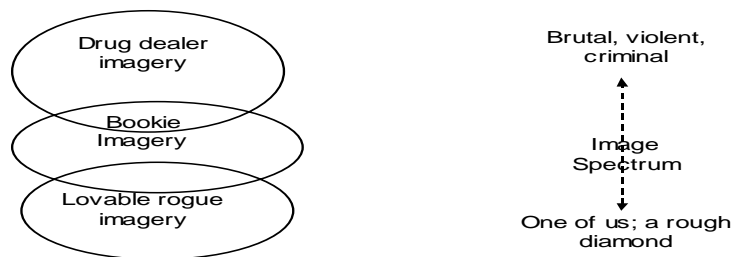
In general, though it is acknowledged that you might get a genuine (if expensive!) ticket via a tout, consumers consider the term 'tout' to be a **derogatory one**, indicative of someone who's operation might be shady, manipulative, dishonest, even criminal. Discussing the role and character of touts, most ticket-buying consumers



are inclined to visualise a real person, operating outside an event/concert “*with a big wad of tickets and a big wad of money*”. Interestingly, the characterisation was also - often - male, middle-aged, small in stature but overweight, and balding:

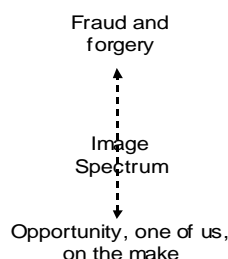
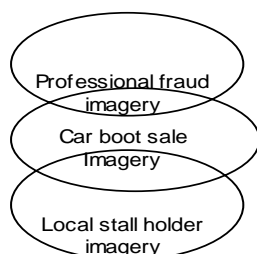
“*A dodgy little bloke with a cap to cover his bald head; beads of sweat ...*”

This ‘archetype’ notwithstanding, the ‘tout-in-person’ was variously considered something of a lovable rogue through a spectrum of typologies up to a more worrisome, even violent, criminal, viz



When pressed beyond the ‘tout-in-person’, consumers in a few cases, volunteered that ‘touts’ could also be found on the internet ... though the tendency was **not** to describe web ticket sellers as touts. This is an area where public perception is distinct from that of industry stakeholders, who see the new internet touts as “*far more evil*”.

In consumer minds, those who sell tickets on the internet are more likely to be viewed as ‘chancers’, and behaviourally “*closer to me*”. For example, again expressed as a spectrum, the ‘comparison’ imagery which emerges in relation to the new (internet) tout includes:



"It's basically a chap like me trying to make a buck selling on the internet. It's not like the touts outside the rugby!"

"I heard about ... someone in Manchester ... and I think it involved drugs too, but the guy was a tout and he got stabbed ... in the street outside where I lived ... it was to do with territory ... you don't get that with internet touts!"

Beyond the attendant mythology, then, most of the general public sample, were decidedly muddled as to who might be 'authorised' to sell tickets (if anyone was 'authorised') and, significantly, what behaviours were legal and illegal:

"Touting is definitely illegal."

"Selling the few extra tickets is absolutely fine."

"... it's just irritating, not illegal."

"Buying in another name to get more, is illegal."

"It's only if you misrepresent that it's illegal; if you don't have the actual tickets."

*"... oh no, if you **buy** tickets from someone outside a concert it's not illegal ..."*

3.3 Public Understanding about Ticket 'Possession'

Again, in the absence of clear understanding, much of public 'opinion' is based on 'hunches' and a personal take on social responsibilities.

In practice, the realities of public understanding around ticket sourcing and selling comprised these working assumptions:



- Ticket re-selling at a profit is accepted as 'fair game' so long as it is done by 'individuals' (hard to define) rather than organisations:

"I've no problem with anyone covering their costs by selling a few extra tickets."

- Blocking/block purchasing of tickets is 'unfair' if it breaks the rules (e.g., 2/4 per enquiry); it may, or may not, be illegal but with different identities used, it would be *"impossible to police"*. Evidence for such practice is generally 'mythical', though some cite multiple tickets being auctioned by one person on eBay as, potentially, a result of (unauthorised) multiple purchasing:

"I've read where they use different phone lines and book lots of tickets when you're only supposed to get two - you do see tickets like that for sale. I don't have a problem if - say - one of us bought a couple of extra to cover their trip ... after all, if someone's made the effort to go on the internet at 6 in the morning!"

- Terms and Conditions are widely ignored, never routinely read, and - again, as a matter of 'working practice - assumed to be *"irrelevant"* and non-binding:

"I can't say I've ever read anything in small print about a ticket."

- One of the reasons Terms and Conditions are considered 'unenforceable' is that they are known, or 'imagined' to contain *"unrealistic"* dictums, notably the **non-transferability** requirement. **Because ordinary people routinely experience this to be 'untrue' (or undetectable) this reinforces a climate of widespread disregard around ticket Terms and Conditions.**

"There's no way you'd ever get into trouble for giving someone else your ticket."

- Non-refundability, on the other hand, is more widely accepted as a 'fact of life', reinforced because many experience this to be the case in a number of good purchasing areas, from clothes to travel to live event tickets. It is well absorbed and understood to be 'contractually fair'.

Indeed, 'non-refundability' is so well absorbed that several respondents instanced *"not bothering"* to attempt refunds even via permitted channels because they had such low expectations of success:

"I once gave two tickets back to the ice rink in enough time and they said to come back if they re-sold them but I never bothered ..."

In one instance, a respondent even 'accepted' no refund for a cancelled ticket event ... *"because I couldn't remember where to write or call back ... I couldn't find the address again after I'd sent my ticket back."*

Though 'resigned acceptance' is apparent, this does not mean that consumers wouldn't welcome improved refund/ticket exchange options or channels, just that there is very little **expectation** of such facility:



"I think everyone knows it's just tough if you can't go ..."

3.4 Public Understanding about 'Selling On'

In the qualitative sample (of 48 respondents) around 10 to 12 individuals had, in the past, sold tickets on to people other than close friends or relatives. This, again, is probably a higher percentage (given their high level of ticket purchasing behaviour), than might be the case across the wider population. Of these, three or four were very open about buying tickets **with a view to re-sale and profit** - though in one account the respondent described "*getting his fingers burnt*" in failing to reach face value offers for two Elton John tickets on eBay. (He subsequently withdrew his tickets and attended a "*very good*" concert himself!)

At a 'belief in practice level' just as in the NME poll (where 21 per cent sold, 40 per cent bought - yet 67 per cent claimed auction re-selling was 'unacceptable') there appears to be a 'disconnect' around selling-for-profit where it applies to the self:

"I actually feel it's a bit dishonourable to buy tickets to sell them again."

"If you turn a profit, say 50 per cent, on half your tickets and that covers your train fare there's no problem with that."

"Well I have sold on eBay; I haven't made very much money ... but then, I'm not a tout ..."

"Oasis tickets - I made quite a lot ... (and, later) ... the prices some of these guys are getting, it's ludicrous."

In general, people are confused and inconsistent in their attitudes around this area. There is, oft-repeated, a sort of 'market economy culture' defence whereby consumers claim 'we live in a competitive, market-driven economy' and, the Government are pro-competition and inclined to encourage initiative/ entrepreneurship ... therefore the minor profiteering behaviours of individuals is wholly acceptable, even beneficial ...

"It's New Labour that has taught us to be like this - they are two-faced and promote gambling."

"They're only bothered so they get as much tax as possible ..."



4. **Stakeholders' Concerns about the Secondary Market**

The eight depth interviews conducted with stakeholders ranged across a spectrum of interest. There were those whose attitudes were informed by 'consumer championing' working roles, those who had professional interest in, and concerns related to, the commercial promotion of live events and ticketing regulation in this regard, and one respondent who represented a commercial secondary ticket selling agency. Though their (in most case, strong held) views are 'demoted' relative to the privileging of general public perceptions, there are, nonetheless, some important, relevant and contextual learnings which are useful to report **in relation to the general public**.

i) **Consumer Champions**

For these respondents, there was a consistent note in response to the general area of ticket touts/secondary markets; the issue, though potentially concerning, was not considered one of major pre-occupying importance. Both representatives felt that it was an 'OFT or TSB issue' related to which there was a steady, but moderate, stream of associated complaints but "*never a torrent*".

Speaking with the 'consumer watchdog' hat on, both could see a balance of positive and deleterious effects related to (irregulated) secondary ticket selling. In a spirit of 'competitive freedom' consumers could, potentially, access more tickets because of the secondary market; however they expressed a note of caution in relation to the potential miss-selling, or misrepresentation which could (and sometimes had) occurred when unscrupulous ticket sellers had 'cheated' consumers. On balance, though, and perhaps because only when issues became 'serious' would consumer champions be approached, both held the view that the status quo in regard to authorisation and regulation around live event ticketing was acceptable:

"I didn't think miss-selling of tickets is a big issue with average consumers."

ii) **AS Biss/Promoters (including STAR)**

These respondents (five in total), to varying degrees, felt that the secondary market represented - and is likely to increasingly represent - a serious threat to the freedoms and access which (some) consumers have in relation to live event tickets.

They see (unregulated) secondary market sales as 'damaging' to audiences because ultimately they are likely to push prices up by artificially stimulating demand, and through the 'circular effect' whereby primary promoters and their agents increase initial face values in an attempt to 'squeeze out' the margin which might attract the opportunistic secondary seller.

To an extent this is a rhetorical, even 'spurious' argument from the general public angle, in that if the enthusiasm and willingness to purchase (at inflated prices) exists, then the market is, arguably, robust and withstanding.

Perhaps more significant, in relation to the consumer (as opposed to industry/professional) position, is the assertion that the followers and fans are, disproportionately disadvantaged because disinterested secondary sellers "*snatch up*" too many tickets to events, too early. There is a danger, particularly for major



concert ticket and iconic sports events, of artificial shortfalls in tickets and/or sales to 'corporate' purchasers, rather than a wider population. These phenomena, in turn, it is argued, "*encourage crime*".

There is a third 'market' issue highlighted; all the 'promoter stakeholders' spoke of the abuse of terms and conditions involved in ticket touting/the secondary market. In the case of the more highly regulated sport ticket sales (football and rugby) they make the case that consumers are, ultimately, adversely affected ...

"It leads in the end to consumers being let down; we had to cancel tickets ... and reduce x club's allocation for selling-on reasons."

Certainly, the Rugby Football Union takes action against those who breach their tickets terms and conditions. More generally, consumers (as outlined above) representing the general public are **unaware of the terms and conditions of tickets or consider them to be inconsequential**; indeed, they see non-transferability as unrealistic, unenforceable, even 'unfair'.

There are, though, pertinent 'social/ethical' arguments made by promoter-interest stakeholders, notably that the secondary market may threaten security around venues; crime and violence are all potentially exacerbated and 'disturbing', at the least, to the general public.

Beyond this, stakeholders also argue - as do the public - that there is some inherent 'penalising' of poor and needy population groups - and **families** - through the "*ruthless ticket-grab*" incurred in some instances ahead of very popular sell-out events:

"The real fan is forced out, the rich corporate clients get all the tickets ... families with children can whistle ..."

These respondents felt that eBay was especially culpable since it 'allowed by inaction', profiteering "*at the expense of fans*" and encouraged a "*commercial rather than cultural*" atmosphere to dominate.

iii) **Non-authorized Agents/Secondary Marketers**

Unsurprisingly, the spokesperson for this sector felt that the promoter/primary agent view was restrictive and anti-competitive; moreover, it was "*anti-nature ... people will always sell tickets if they can't use them ...*" However, issues specifically pertinent to the consumer experience in relation to this stakeholder sector might include:

- The (voluntary) agreement to reinforce verification of tickets and other good practices (insurance, secure payment systems, ticket guarantees, etc.) to improve the consumer offering.
- The outlawing (through practice codes?) of futures selling:

"If the tickets don't exist or are not yet issued, no-one gains by selling them ..."



5. Government Role

From a consumer perspective, there was much scepticism about the need for, and/or the nature of, a governmental role in the regulation of live event ticket sales. Some felt that governmental input might be disingenuous ...

“The ministry of what? ... did you say culture ... are you having a laugh?”

“The Government would only be interested if they were wanting to tax everyone more ...”

There is a fear, then, that ‘limiting’ live event ticket sales to primary sources (the Box Office) by the Government would only be implemented in order to increase tax revenues, rather than to protect the interests of consumers/improve access:

“I run a small business and frankly I can imagine the whole Government thing of bureaucracy ... they will be wanting to legislate to create more red tape ... nanny state stuff.”

There is, though, a more dispassionate and considered concern that, perhaps, Government could **positively intervene** and/or leverage its power to improve access to live cultural/sporting events for those least able, on a variety of scores - financial, physical, geographical etc.

Government intervention, then, might, from a consumer standpoint be seen - ideally - in the light of ‘positive and encouraging’ actions rather than negative, legislative or punishing actions:

“Why don’t they just make a certain amount at a show like the Sound of Music ‘family only’ if they want to encourage kids to go to the theatre ...?”

“You want children to feel welcome and safe at football matches ... Sport is something this Government should encourage more against the obesity ...”

Overall, then, it is fair to say that consumers feel Government intervention, certainly in terms of legislation, is unnecessary and could even risk consumers experiencing greater restriction to ticket access.