



WHITE
PAPER

SAAS REPORT
2019 | 2020

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INTRODUCTION

Software as a Service is a hot topic everywhere in the software sector worldwide and also in Ticketing. Oxynade conducted a survey to research how this SaaS trend resonates in the overall business.

In collaboration with several networking events, the survey has reached participants from different countries, markets and verticals.

The target of this questionnaire is to measure "How SaaS is the ticketing business", by creating a global ticketing SaaS index.

In this report, the results are presented covering the various topics of the survey.

This personalised report will allow you, based on your answers, to benchmark your personal results and score, in comparison to other ticketing agencies and partners.

Get ahead of the Ticketing Business and enjoy this whitepaper!
The Oxynade Team

BACKGROUND & DEFINITION

SAAS

SAAS IS THE ABBREVIATION OF SOFTWARE AS A SERVICE, A MODEL WHERE ONE DOESN'T DEVELOP SOFTWARE ANYMORE, NOR BUY OR LICENSE A PACKAGE BUT JUST "USE" (AND PAY) A READY TO USE SOLUTION IN THE CLOUD.

OUTSTANDING SAAS ADVANTAGES

01

Easy to start & run

Fast set-up time & always up to date.

03

Highly accessible

No need to install software due to browser & app based use.

02

Pay on need-base

No upfront cost, all included, price growth with your needs.

04

Highly scalable

Multi tenant solution, power & storage availability.

The underlying idea is to unburden the customer of all the technical aspects and thereby to give him more time to focus on the business itself. The software is only a tool to achieve your goals, not a reason on itself.

This same underlying idea of "making life easier" can also be applied on other non-software aspects. These aspects were also covered in the survey. Although there are not matching the strict definition of SaaS, they are very meaningful in this context.

**WE BELIEVE THAT SAAS
WILL BECOME MORE
& MORE DOMINANT
OVER TIME IN
TICKETING**

The survey measured the level of SaaS in the ticketing world. Because of the importance of the SaaS development within this industry, the global SaaS-Index should be measured regularly. The survey will therefore be updated annually.

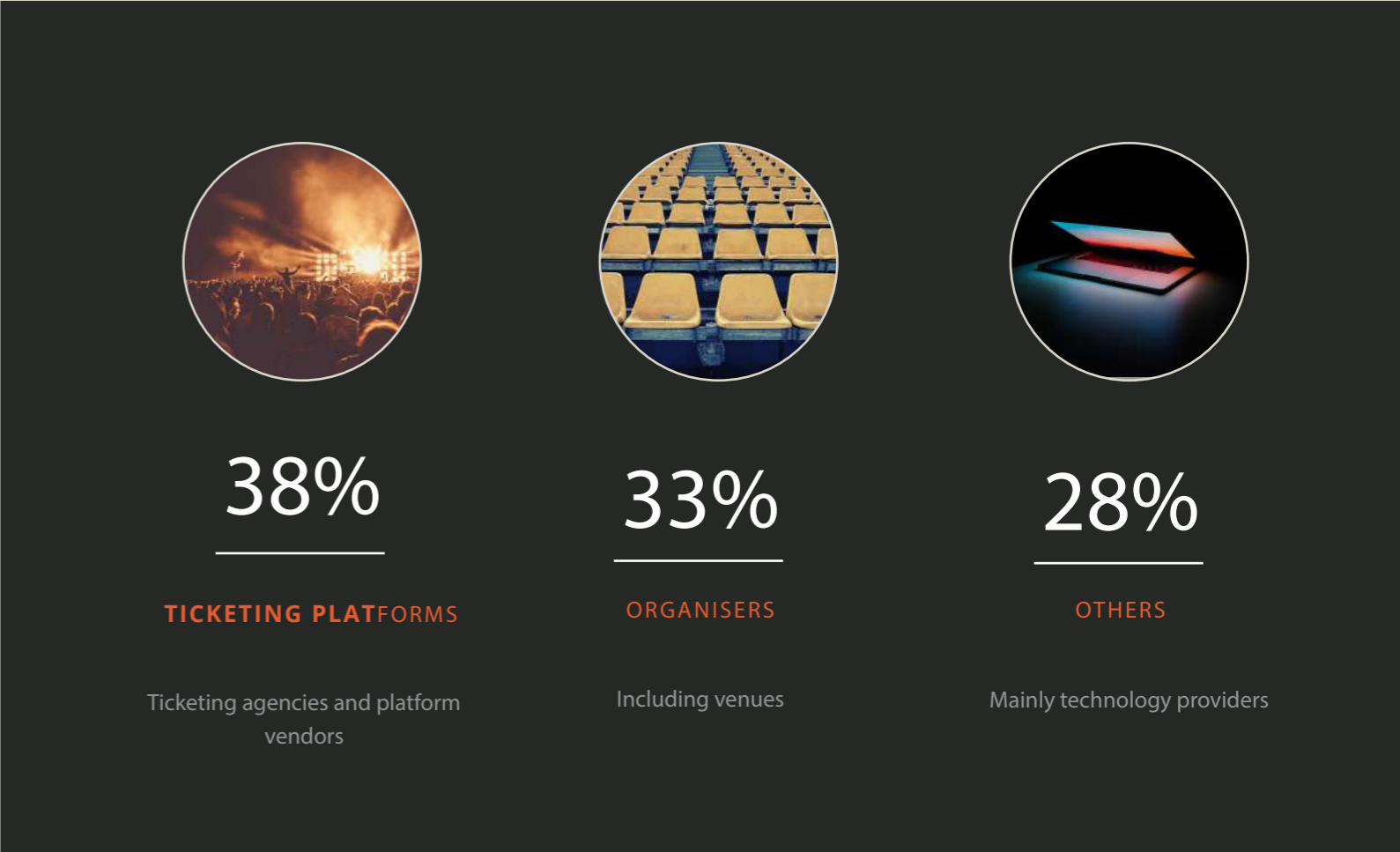


DOWNLOAD

THE FUTURE OF SAAS IN TICKETING

More background information about the future of SaaS in Ticketing can be found in the [presentation “From SaaS to Enterprise SaaS in Ticketing”](#) by Hans Nissens.

WHO PARTICIPATED
IN THE SURVEY



The participation was quite equally divided.

This survey report is focused on the answers of the Ticketing platforms and the Organisers/Venues because they are most relevant in this context.

You belong to the group

GLOBAL SAAS INDEX

0-100%

40%

THE GLOBAL SAAS INDEX REPRESENTS THE PERCENTAGE OF SAAS SOFTWARE THAT IS USED FOR THE OPERATIVE DRIVERS OF THE TICKETING BUSINESS.

To measure the level of SaaS concepts used in the ticketing sector, the survey covered questions concerning the 'SaaS status' of the different operative drivers of the business.

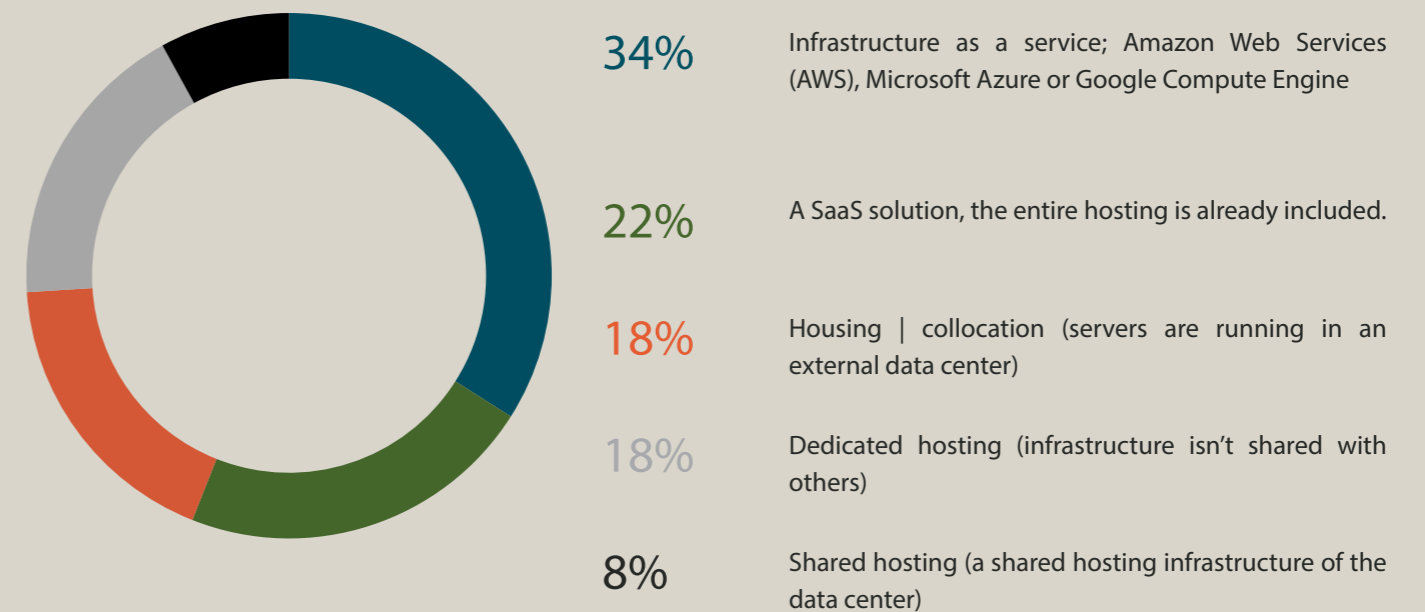
- Infrastructure and hosting
- Development (outsourcing, releases, ...)
- Features (self-service, API, payment solutions, ...)
- Connected services (additional tools)
- Future changes (what changes do you foresee in the future)

Each group gets his own sub score, the weighted sum of these sub scores contributes to the Global SaaS index.

In the following chapters, the specific drivers will be discussed

INFRASTRUCTURE AND HOSTING

More than **56%** is using "Infrastructure as a Service" or a SaaS solution.



More on the different types of hosting and their advantages can be found in the [presentation "From SaaS to Enterprise SaaS in Ticketing"](#) by Hans Nissens.

ONLY 40% IS USING AN EXTERNAL SOLUTION. THE VAST MAJORITY - 60% - IS STILL DEVELOPING THEIR SOLUTION IN-HOUSE.

Development

In the development section, the questions focus on the ownership of the solution (IP) and the developers of the ticketing platform.

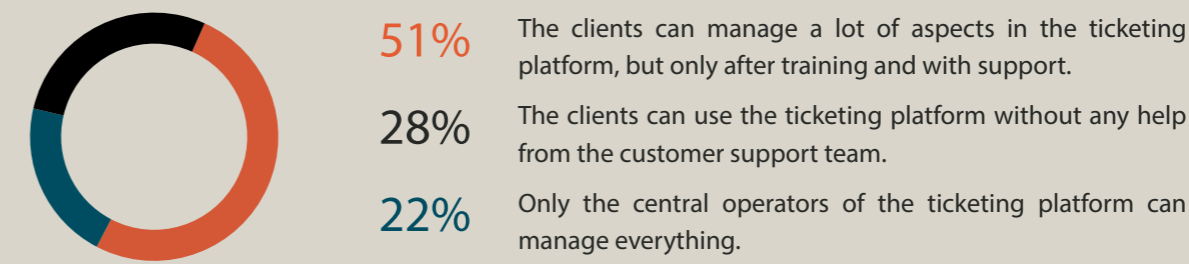
The vast majority (60%) is still developing their solution in house. The remaining 40% is using an external solution (for example a SaaS solution or a bought solution). In that case, there are no more developers needed to maintain and expand the ticketing software.

The percentage of in house developed solutions is still quite high compared to other sectors. In one of the following sections we will learn that the business of the majority of participants is restricted due to the limitation of their platform. Both answers are interconnected.

The inhouse development is mainly done with an inhouse team of developers (employees). Only a small percentage is relaying on external/outsourced developers. The reason of this small percentage can be found in the cost of external development which probably cannot compete with using directly external solutions.

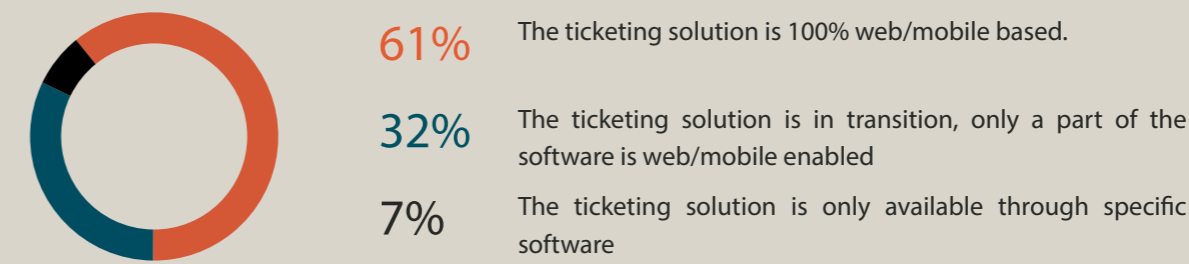
Functionalities

Self-service



A full self-service platform offers a great deal of advantages in reducing the cost of supporting your customers. On one hand, the assistance of the support team is less often required (because the customers can do everything themselves), on the other hand the work of the support team itself can be done more efficiently (successful self-service solutions will always be highly user friendly).

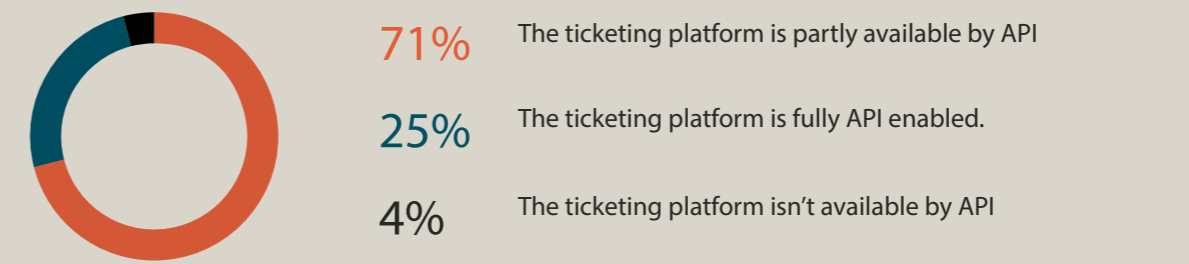
Web/mobile enabled



One important aspect and advantage of SaaS is the availability of the solution in every place and at every moment during the day. This can only be achieved when the application is fully web enabled. 61% of the participants claims they already have a complete web or mobile based solution, this is quite a high result.

The survey results made it evident that the crucial mobile aspect is often neglected.

API enabled



Modern technology is always API enabled in its core. The question about API support gives an indication about the modernity of the ticketing platforms.

Only the latest technology is truly API-centric and not just an extension.

Connected Services

Connected service are additional features or tools which do not belong to the core ticketing functionality. Examples are CRM, Marketing automation, cashless payments, ...

The ticketing market is constantly demanding the best and the newest of the ticketing platforms including these services. Because of limited resources, the time to market and the high specialization, an exceeding amount of external services are used.

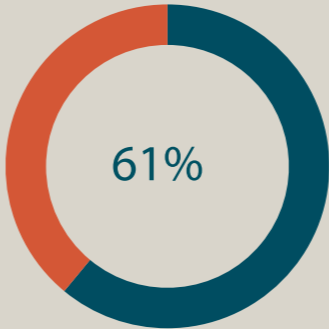
In the survey the usage of the different connected services was questioned. The most used connected services are CRM, BI/analysis tools and marketing automation. The least used services are ticket exchange platforms and planning software.

Service	% used
Reporting	71%
CRM	68 %
BI / analysis tool	64 %
Marketing automation	61%
Dashboarding	61 %
Mailing tools	61 %
Scanning	50%
Cashless payments	50 %
Queuing solution	46 %
POS (Point Of Sales)	42 %
Real-time ticket sales monitoring	42%
Ticket exchange / sharing	39 %
Planning software	14%

Future Changes

THE SHIFT TO MORE ADOPTION OF SAAS CONCEPTS IS JUST A MATTER OF TIME

Who wants to improve in the future?

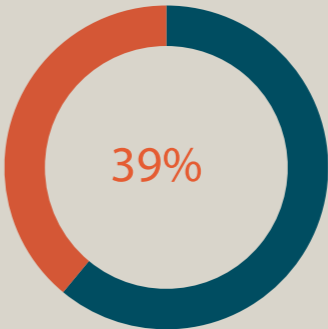


Of the participants feel their business's growth into new verticals restricted by their platform

They want to have more possibilities and features to enter new verticals or segments.

This is quite high and remarkable number

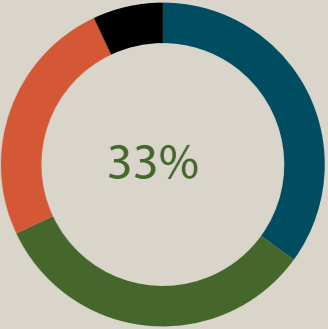
Is a significant cost reduction possible?



Wants to achieve a cost reduction of at least 20% by implementing more SaaS aspects.

They could be paying too much for their solution and could be looking for a less expensive solution for their business needs.

Would you consider a full SaaS solution?



Is considering a SaaS solution in the next 24 months.

- 35% Is currently not considering a full SaaS solution
- 25% Is already using a SaaS solution
- 7% Unknown

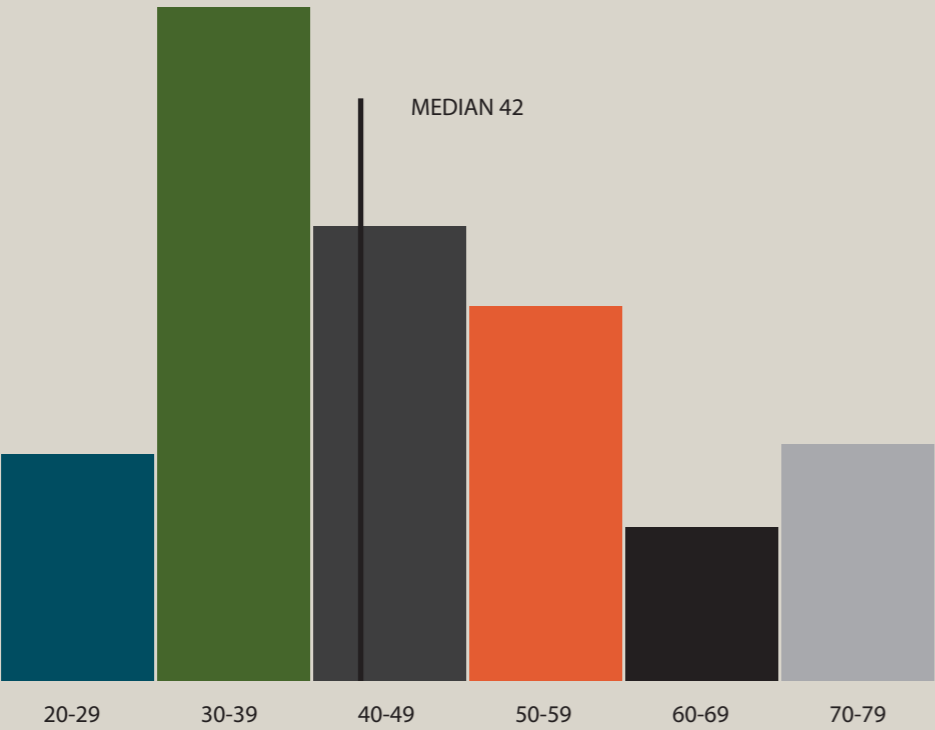
The trend to adopt SaaS is clearly noticeable.

The global SaaS-index calculated

Based on the scores of the individual operative drivers of the business (infrastructure and hosting, development, features, connected services and future changes) the Global SaaS Index was calculated.

Each group received his own sub score, the weighted sum of these sub scores contributes to the final result.

The average Global SaaS-index among all participants is 40%.



The results are divided over the full score range, but the average is a score around this 40% so there is still a lot of improvement possible.

CONCLUSION

SAAS IN TICKETING

THE SAAS CONCEPT IS DRIVEN BY EXTERNALIZATION OF TOOLS, TASKS AND PROCESSES. THIS FIRST SAAS REPORT HAS GIVEN INTERESTING INSIGHTS IN OUR TICKETING SECTOR.

Some of the results were predictable like for example the conclusion that the externalization is already most advanced in infrastructure and hosting.

Other results were less expected. The low adoption of full self-service solutions gives for example a lot of room for further improvement.

The most striking conclusion is that most ticketing solutions are restricted by the (technical) limitations of their platform. Providers of SaaS solutions have a mission to convince the ticketing sector that SaaS is a valid answer to these needs.

OXYNADE PRESENTS

ENTERPRISE SAAS

WHERE A REGULAR SAAS TICKETING PLATFORM CAN HELP ORGANISERS AND SMALLER VENUES, ENTERPRISE SAAS FOCUSES ON LARGER TICKETING ORGANISATIONS LIKE TICKETING AGENCIES, BIG VENUES OR MAYOR EVENT ORGANISERS. IT ADDS MANY ADDITIONAL FUNCTIONALITIES, BUILD FOR THEIR SPECIFIC NEEDS.

	SaaS	Enterprise SaaS
External hosting	✓	✓
Full Web based	✓	✓
Multi tenant	✓	✓
Ultra tenant	✗	✓
Full API	✗	✓
100% white label	✗	✓
Payouts	✗	✓
External/connected services	✗	✓

if you want to discover more about our [white-label platform](#), you can always check-our [webinars](#) or [blog](#).

You can also [book a personalised and private demo](#) to get the time and opportunity to discuss your business challenges.