



# **THE ANONYMOUS FAN INDEX**

**DO SPORTS ORGANISATIONS HAVE  
A MILLION DOLLAR FAN PROBLEM?**

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## Introduction

We launched the Anonymous Fan Index because the industry kept talking about fan engagement without acknowledging the fundamental problem: how can you engage with people you don't know exist?

The numbers confirmed what many of us suspected:

**62% of organisations are losing over \$100,000 annually to invisible fans, and one in three put the figure north of \$1 million.**

But this isn't just about quantifying the problem. It's about giving senior execs across sports the data they need to make the case internally for change. Broadcast deals are stagnating, social reach is plateauing, and sponsor expectations are rising. The organisations that survive this shift will be the ones that stop renting attention and start building owned relationships.

This report exists to accelerate that conversation. Not by telling people what to do, but by showing what's already working for those who've made the leap.

**Ed Abis, CEO, Dizplai**



## 76% of your fans are strangers.

Across the rights holders, leagues, clubs, and federations who participated in our recent Anonymous Fan Survey, organisations only have the names and contact details for around 24% of their fanbase. Almost half say they have identifiable data on just 11-25% of their fans.

**This isn't simply a data problem.  
It's a missed opportunity.**

### The cost of invisibility:

- **63%** believe they lose more than \$100k annually because they aren't reaching fans directly.
- **A third** put that loss between \$1m-\$5m
- **87%** face moderate to high pressure from sponsors to deliver measurable fan engagement
- **60%** say at least a quarter of sponsorship renewals are now tied to digital engagement data

The landscape is shifting quickly. Media rights values are slowing. Fans are being tempted away from official channels. And audiences are scattered across dozens of platforms, making them harder to reach and impossible to measure as a unified group. Yet the vast majority of organisations still sit in 'Beginner' or 'Developing' fan data maturity.

It seems that size doesn't matter as much as it used to.

The giants have massive broadcast reach but don't own those relationships.



Creators are the underdogs that have smaller audiences, but actually know who their fans are. When sponsors start demanding proof of engagement, the playing field changes.

First-party fan data is the equaliser. Information collected directly from fans through your own channels rather than broadcasters or social channels: their names, contact details, preferences, behaviour. Your data. Your relationship.

Whoever builds that foundation wins.

**This index shows you what we found,  
where your revenue's disappearing, and  
what you need to do about it.**

## The problem:

Sports organisations have spent decades building massive audiences. Millions watch every match. Billions of impressions. Record-breaking viewership.

**But to be fair, you don't know who most of them are.**

The fans watching your content, sharing your moments, and driving your reach are completely invisible to you. They're not in your database. They're not on your email list. They're not part of any loyalty programme.

And anonymous fans generate low or unmeasurable revenue.

**Question: Roughly what % of your fanbase do you currently have identifiable, first-party data on?**

### Key findings:

- Average identifiable coverage: **24%**
- Most common response: **11-25%** (46% of respondents)
- One in five organisations only know **0-10%** of their fans

This holds true whether you're a giant top-tier league or a challenger federation. Both groups cluster around that 11-25% band.

A few underdogs report knowing more than half their fans, but for most, fans remain largely invisible.

### What this means

You're negotiating million-dollar rights deals and sponsorship packages based on audiences you can't identify, contact, or prove engagement with.

## Where your fans disappear

Not all channels are created equally. Some give you data. Some give you reach. But very few give you both.

**Question: Which touch points provide the most fan data for you?**

### Top sources

- **Ticketing:** 67% of respondents
- **Membership and loyalty programmes:** 48%
- **Social media:** 41%
- **eCommerce, event activations, OTT platforms:** significantly lower

**The richest data still lives in the most traditional environments.**

Meanwhile, social platforms, OTT, and wider digital behaviour aren't yet wired into a coherent fan graph.



## Question: Which channels are the hardest to convert anonymous fans into known fans?

### Top sources:

- **Broadcast viewers:** 67%
- **Social media followers:** 33%
- **Website visitors:** 25%

This is the paradox: the biggest reach sits where you have the least control.

The fans who consume the most content are often the ones you know least about.

Broadcasters give you scale. But they don't give you relationships. And without relationships, you can't build loyalty, personalise experiences, or prove value to sponsors.

**“ We're taking the data and relationship strategy much more seriously now. As a smaller organisation, we can't compete on reach alone. Success for our business is much more closely tied to how well we understand our customers and our ability to deliver tangible outcomes from our engagement. Relying purely on broadcast numbers leaves you exposed, especially on your sponsorship proposition.**

**The shift we're making at Supertri is moving us away from vanity metrics and towards genuine attribution. Understanding not just how many people are watching, but who they are and what that means for our business.**

**That's where the real value sits, and it's where we can build partnerships on solid ground rather than borrowed audiences”.**



**Chris Williams, Commercial Director, Supertri**

## The Million-Dollar Blind Spot

Let's look at what this is costing.

### Question: How much revenue do you believe is lost each year due to anonymous fans you can't reach directly?

Perceived revenue loss:

- 62% lose more than **\$100k annually**
- 33% estimate losses between **\$1m-\$5m**
- 25% simply don't know

This isn't abstract. It's real money leaking out because rights holders can't connect attention with revenue.

## Question: What's your average revenue per fan annually?

### ARPU reality:

- 30% earn less than \$10 per fan per year
- 33% either don't measure ARPU or aren't sure

Known fans are in the minority. ARPU is low. Many organisations don't have a clear fan value model.

That's a tough position to negotiate from when sponsors start asking questions about who's watching.

## The Sponsorship Reckoning

Sponsors are not just buying reach anymore, they're buying proof.

## Question: How much pressure are sponsors putting on you to deliver measurable fan engagement data?

- 87% report moderate to high pressure

## Question: What % of sponsorship renewals are now tied to delivering digital engagement or fan data?

- 60% say at least 26% of renewals are tied to digital engagement or fan data

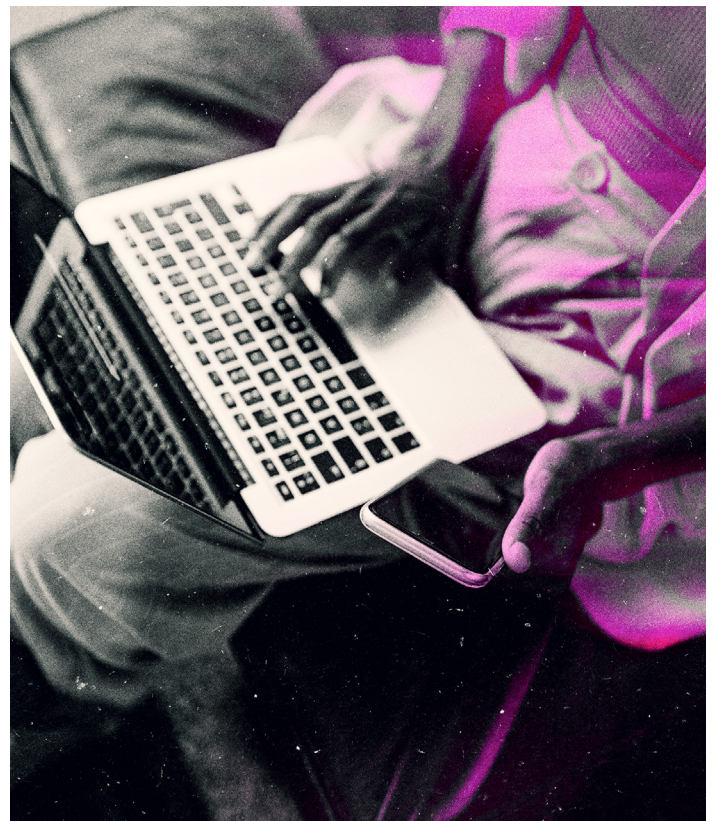
- Among underdogs, **35%** say more than half of their renewals depend on engagement delivery
- Giants in this sample report **0%** in that majority band

### This is where the power dynamic shifts.

Underdogs can't sell on scale alone, so they're forced to sell on engagement, community, and proof of connection. That pressure is becoming their advantage.

Giants still have the reach. But if they can't prove engagement, their sponsorship story starts to crumble.

Sponsors care about reach, but they care more about proof. And if you can't show how many fans you actually know, what they do, and how their behaviour changes over time, you've become vulnerable.



## Giants vs Underdogs: Broadcasters vs Creators

On the surface, everyone's struggling with the same problem.

What's similar:

Both know about 25% of their fanbase on average

Both rely heavily on broadcasting, media rights, and sponsorships as primary revenue

Both sit mostly in "Developing" fan data maturity, with very few claiming to be "Advanced"

But dig a little deeper and a pattern emerges.

## Where the underdogs edge ahead:

**35% of underdog organisations say that more than half of their sponsorship renewals are tied directly to digital engagement and fan data.**

Giants don't show up in that band at all.

Why? Underdogs are having different conversations with brands. They don't have the sheer scale, so they lean into proof of community and measurable engagement.

That's their advantage. And it's teaching them skills that will matter more as sponsor expectations tighten across the board.

## Content Strategy: The Free vs Paywall Divide

There's no consensus on content strategy. That's both a problem and an opportunity.

**Question: How much of your fan content is freely accessible vs paywalled?**

→ **50%** say 76-100% of content is free

→ **20%** have only 0-25% of content free

**Majority Leaning Towards Free:** The fact that 50% of respondents offer 76-100% of their fan content for free shows that a large segment is prioritising reach, top-of-funnel growth, and community building over immediate revenue from paywalls. This aligns with the strategy of "throwing everything open to grow reach."

**Significant Focus on Paywalls:** Conversely, the 20% who only offer 0-25% of their content for free are clearly prioritising direct revenue and exclusivity. They are relying on high-value, protected content to drive subscriptions or premium purchases.

**The Missing Middle:** The data seems to suggest fewer organisations are adopting a 26-75% free content mix, indicating that many are making a definitive choice between two extreme strategies: mostly free or mostly paywalled.



## Question: Do you see piracy and free access as an opportunity to widen the funnel or a threat to revenue?

- **33%** see it as an opportunity to widen the funnel
- **33%** say neither threat nor opportunity
- The rest are **split between threat and both**

**Even at leadership level, there's no agreement.**

But we can use this. It means you can lead the conversation instead of following it. If everyone's still figuring it out, being bold and testing new models gives you an edge.

**“Across a fan engagement and data strategy, it's not just about capturing data, it's about finding the right tech partner with the right commercial model, and then actually being able to monetise those outcomes.**



User data is often now part of briefs we receive, with specific delivery KPIs attached to it and is without doubt becoming much more prevalent across our wider digital strategy. The figures in the report are interesting and the actual commercial impact is likely much higher depending on how an organisation monetises that relationship”.

**Gareth Rees, Head of Commercial Distribution, World Rugby**

## Where the money's going next

Organisations know they need to change. They're just not sure how yet.

## Question: In the next 12-24 months, what will you prioritise to reduce anonymous fandom?

### Investment priorities:

- CRM systems
- Membership models
- Direct-to-fan content and OTT
- Interactive engagement tools

## Question: How mature do you consider your organisation's fan data strategy?

### Data maturity levels:

- **58%** classify themselves as “Developing”
- **29%** sit in “Beginner”
- Only **12%** feel “Advanced”

The data reveals a strategic tension: organisations recognise the need for a direct relationship with their fans, yet the foundational tools to achieve this are still underdeveloped across the sector. The industry knows where it needs to go. It just isn't there yet.

## How technology has evolved (and why it matters more than ever)

### Here's the shift: technology is no longer the barrier. It's the enabler.

Ten years ago, building a direct relationship with millions of fans was logistically impossible. CRM systems were clunky. Engagement tools were expensive. Data collection was manual and slow.

Now there are interactive overlays, QR codes, live polling, predictor games, super chats, all of which can be deployed at scale without rebuilding your entire infrastructure.

### Tech has changed the game:

**QR codes during broadcasts and at venues:**  
Instant data capture. Fans scan, you collect.

### Live polling and predictor games:

Turn passive viewing into active participation. Engagement becomes a data goldmine.

### Super chats and fan shout-outs:

Monetise attention while learning preferences in real time.

### In-stream quizzes and trivia:

Reward engagement with exclusive content, discounts, or access.

### Membership platforms with tiered access:

Give fans a reason to identify themselves in exchange for belonging.

Technology isn't the problem anymore. Behaviour is.

Most organisations are still operating like it's 2010. They're optimising for reach on platforms they don't control, while the fans who could drive the most value remain anonymous.

Meanwhile, content creators, who are armed with the same tools, are building loyalty and revenue that legacy broadcasters can't match.





# The Collective Solution: What needs to happen?

This isn't a problem one person can solve alone. The infrastructure needs to shift company-wide.

What needs to change:

## 1. Make known fan growth a board level metric

- Track the percentage of fans you can identify and contact
- Set annual targets and treat it like attendance or rights revenue
- If it's not measured at the top, it won't get prioritised

## 2. Tie fan data to sponsor stories

- Build sponsorship decks around growth in known fans, not just impressions
- Show engagement data that proves loyalty, not just clicks
- Help sponsors see fans as a community, not a number

## 3. Shift from platform addiction to fan ownership

- Use social, broadcast, and third-party platforms as front doors, not homes
- Design every campaign with a next step that brings fans into your ecosystem and treat every big moment as a data capture opportunity

## 4. Let underdogs experiment

- Challenger properties should be your testbed
- Trial new membership models, formats, and content strategies
- Scale what works and roll it up to the flagship properties

## 5. Invest in skills, not just systems

- Tools are useless without people who know how to design journeys worth staying for
- Upskill marketing, commercial, and legal teams to think about fan relationships, not just transactions

# So what can you do right now?

## Here's where to start:

**Audit your anonymity.** Run the numbers. What percentage of your fanbase can you actually contact? Where are the biggest gaps? Which channels give you the most reach but the least data?

**Pick one high-reach, low-data channel and fix it.** If broadcast is your blindspot, build an interactive layer. QR codes. Polls. Predictors. Give viewers a reason to step out of anonymity.

**Reframe your sponsor conversations.** Stop leading with impressions. Start with engagement, known fans, and proof of community. Show them you're not just delivering views, you're developing relationships.

## **Test a membership model.**

Even a basic tier. Make it free to join. Give fans something in exchange for their data: early access, behind-the-scenes content, exclusive voting rights. Give value to belonging.

## **Consistently build a fan journey, not just a one-off campaign.**

Every piece of content you produce should have a next step. Every activation should move someone from anonymous to known. Design for progression, and not just consumption.

# **Conclusion: Own the Fans. Own the Future.**

The data is clear. Anonymous fandom is costing organisations millions. Sponsor expectations are tightening. Fan behaviour is shifting. And most rights holders are still playing by the old rules.

But here's the opportunity: the playing field is more level than it's ever been.

Giants have the reach while the underdogs have agility. Both need the same thing: first-party fan data and genuine engagement.

Technology has evolved. The tools exist. The question is whether you're willing to adapt and use them. Your competitors could already be onto this.

## **At Dizplai**

We've spent years helping organisations turn anonymous audiences into engaged communities. We've seen what works. We know where the gaps are. And we're ready to help you build the infrastructure that turns attention into loyalty, and loyalty into revenue.

## **Ready to stop losing fans in the noise?**

Let's talk about how we can help you build relationships, not just reach.

We've also compiled a companion guide to our Anonymous Fan Index which includes hundreds of ideas to show you exactly how to turn attention into ownership, and reach into revenue.

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The Anonymous Fan Index was conducted across 50 sports organisations, of which 24 were rights holders, leagues, clubs, and federations to understand how sports organisations are navigating the shift from broadcast audiences to owned communities.





# Ready to stop losing fans in the noise?

Get in Touch