



STRATEGY BRIEFING · FAN INSIGHT

The Case for Knowing **Your Fan.**

Why the relationship, not the audience, is the asset of the next decade. And why the discipline of knowing your fans is the highest-leverage commercial investment most clubs can make. Written from Australian and New Zealand sport.

**The data is the by-product.
The relationship is the point.**

The Case for Knowing Your Fan.

This briefing is the case for why a fan insight program is a commercial priority, not a research function. Eight short chapters: the shift, the Australian picture, the definition, the economics, the moment, the under-16 line, the cost of inaction, and the hidden benefit of doing the work.

Read it cover to cover in twenty minutes. Hand it to the executive or the committee that needs to fund the program. Use it as the opening section of a strategic deck. Every statistic in it is sourced at the back.

This is the strategic frame. The companion guides cover what the program looks like architecturally, how to design each layer, how to fix the most common fan problems, how to operate the program, and how to sell it.

A fan insight program is the operating discipline that turns audience into relationship.

WHO THIS IS FOR

Marketing leads, commercial directors, membership managers, CEOs, presidents, committees, and anyone who needs to make the case for investing in fan insight as a program rather than a one-off survey.

ABOUT THIS SERIES

One of seven standalone guides drawn from The Fan Insight Playbook (2026 edition), Tiparra's operating manual for the fan relationship. The companion guides are listed at the back. Where this guide cites a statistic, the full citation is in its sources page and in the playbook's Appendix C.

From audience to relationship.

For most of the last twenty years, clubs and rights-holders grew the way the media industry grew. They accumulated audience. More followers, more impressions, more reach. Audience was the asset; the strategy was to make the audience as large as possible and then sell access to it.

That model is breaking. Followers are rented from platforms that change their algorithms quarterly. Impressions are increasingly cheap, contested, and unverifiable. Sponsors who paid for logo eyeballs are starting to ask harder questions about whether anyone actually saw the logo, let alone cared.

What's replacing it is quieter and slower to build but worth far more: the relationship. A known fan, whose preferences you've captured, whose behaviour you've tracked, whose attention you've earned through a direct channel you control. That's the asset of the next decade. The audience was rented. The relationship is owned.

This is a structural shift in how value gets created in fan-driven businesses, not a marketing trend. The clubs and organisations that recognise it early, and build the discipline of knowing their fans, will compound a commercial advantage that latecomers can't easily close.

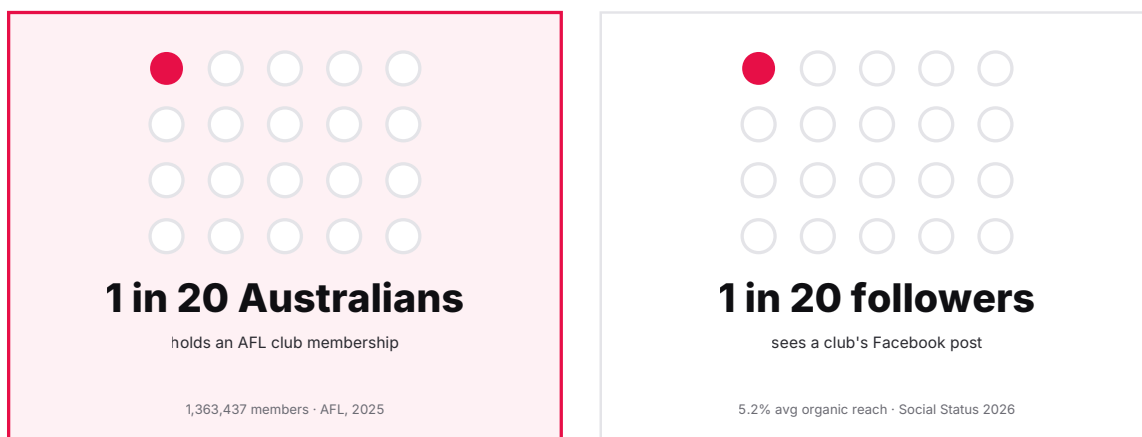
A fan insight program is the operating discipline that turns audience into relationship.

The two one-in-twenties.

Nobody in Australian or New Zealand sport has an audience problem. The AFL's most recent membership announcement recorded 1,363,437 club members, with the league making the point itself: one in 20 Australians now holds a club membership. The 2026 home-and-away season set the all-time attendance record at 7,772,015. The NRL's 2025 season set its own records: 4.98 million through the gates and \$845.6 million in revenue. Underneath the professional game sit roughly 70,000 community clubs and the 2.9 million Australians who volunteer in sport; across the Tasman, more than a million New Zealanders do the same.

The problem is the channel between the club and all of that fandom. Social Status, the Brisbane-based analytics firm, puts average Facebook organic reach at 5.2% across its 2026 monthly benchmarks, January to July. About one in 20 followers sees any given post.

THE TWO ONE-IN-TWENTIES · THE FANDOM AND THE CHANNEL



Same fraction, opposite ends of the argument. The fandom has never been bigger. The channel has never carried less.

Hold those two numbers together and the strategic picture is complete. The audience exists, at record scale, and it keeps turning up. The rented channel most clubs use to reach it delivers one follower in twenty. Everything else in this series is about closing that gap with a relationship the club actually owns.

What "knowing your fan" actually means.

Most organisations think they know their fans. The CRM has names, emails, postcodes. Some kind of ticketing history. Maybe a tag for member or season-pass holder. That's holding a record, not knowing a fan.

Knowing a fan means knowing four things, refreshed continuously:

WHO THEY ARE, BEYOND DEMOGRAPHICS

What kind of fan are they? The lifelong loyalist whose engagement doesn't track results? The family attender who comes for the shared experience, not the footy? The digital-only fan you've never seen at the ground? Each of these is a different relationship.

WHAT THEY CARE ABOUT

Across the season, the matchday, the off-season, the merchandise, the content. The signal includes what they bought, what they responded to, what they ignored, and what they asked for and didn't get.

WHERE THEY ARE RIGHT NOW

Engaged or drifting. Loyal or at risk. Growing or fading. A fan you knew a year ago is not necessarily the fan you have today. Relationships move.

WHAT THEY THINK, IN THEIR OWN WORDS

Not inferred from behavioural data. Asked. Listened to. Acted on.

A fan you can describe in those four dimensions is a fan you can serve well: pricing, content, comms, retail, matchday. A fan you can only describe by name and email is a fan you're broadcasting at, hoping something lands.

The economics of the known fan.

The commercial gap between a known fan and an unknown one widens every year.

RETAINED ON PURPOSE

A known fan can be retained on purpose. You know which members are drifting before they don't renew. You know which casuals are converting toward membership. You can intervene early, segment offers, and design comms that match the relationship, not the database.

SOLD TO WITH CONFIDENCE, NOT NOISE

A known fan can be sold to with confidence, not noise. Personalised retail, relevant ticketing, content built around what they actually consume. Less volume, higher conversion, better margin, fewer opt-outs.

PROOF THAT SPONSORS WILL PAY FOR

A known fan is proof that sponsors will pay for. The biggest single shift in the sponsorship market is the move from impressions to interactions. A sponsor who can be shown that a specific known fan saw their activation, tapped on it, redeemed an offer, and came back next month is a sponsor who renews. And pays more. Clubs that can only offer follower counts and logo placements are trading down every year.

COMPOUNDS OVER TIME

A known fan compounds, and the compounding has been measured in this market. In the foundational Australian study of club membership churn, first-year members lapsed at around 30 per cent a year; churn fell with every year of tenure, stabilising near 6 per cent by year five (McDonald, 2010; about 4,570 members across two AFL clubs). Every season a member stays, the relationship gets cheaper to keep. Knowledge is the part of the asset that doesn't depreciate.

The known fan is worth more, costs less to retain, and unlocks revenue lines the unknown fan can't.

Why now is the moment.

Three macro shifts are converging, and together they make this the decade where fan knowledge becomes the decisive commercial variable.

FIRST. THE RENTED-AUDIENCE MODEL IS DEGRADING

Social platforms have always extracted rent, and in 2026 they started itemising the bill. Organic reach on Facebook averages about one in 20 followers. In September Meta launched Meta One, a paid subscription whose business tiers sell "links in organic posts and reels" alongside "deeper audience insights". The two things a club most needs from a platform, a way to send followers somewhere else and a way to see who is listening, are now priced features. Algorithms reward platform-native behaviour, not the brand's, and in Australia one segment of the audience has been removed by law (the next section covers it).

The leagues have already moved. The NRL has pushed NRL ID past four million registered accounts. In August 2026 the NBL and WNBL signed a multi-year partnership to capture first-party data and unify fan profiles; Cricket Australia signed with the same platform in September. New Zealand Rugby launched a new digital hub for fans in June, pointing to the world's biggest sporting organisations that "have built powerful direct relationships with their fans".

SECOND. THE PRIVACY AND IDENTITY LAYER IS COLLAPSING

Third-party cookies, mobile identifiers, cross-site tracking. The infrastructure that supported the "audience as data" model is being dismantled deliberately, by regulators and platform operators. Australia's Privacy Act reform is part of the same tide: a statutory tort for serious invasions of privacy has been live since June 2025, a Children's Online Privacy Code is due by December 2026, and a second tranche of reform is still to come. The only data that survives the transition is data the fan has knowingly given to an organisation they trust. First-party data is the only data that's going to work.

THIRD. SPONSORS HAVE TO PROVE IT, AND MOSTLY CAN'T

The era of accepting a logo-impression report and writing a renewal cheque is closing. In the World Federation of Advertisers' 2025 study of more than 40 brand owners, nearly three-quarters named measuring and demonstrating ROI as a top challenge, while less than 1% of sponsorship budgets typically goes on measurement. Sponsors are being asked for evidence they have almost no budget to produce. The club that can hand over specific, interactive, attributable value becomes the easiest renewal on the list. Clubs that can't will see sponsorship revenue erode quietly, renewal by renewal.

These forces are tidal, not dramatic. Any single quarter looks unchanged. The compound effect over three to five years is decisive, and visible only after it's too late to catch up.

The under-16 line.

On 10 December 2025, the rented-audience problem stopped being a metaphor in Australia.

From that date, platforms designated as age-restricted social media, a list that currently runs to ten and includes Facebook, Instagram, TikTok, Snapchat and YouTube, must take reasonable steps to prevent Australians under 16 from holding accounts, with penalties for systemic failure of up to \$49.5 million. Enforcement is real: eSafety's March 2026 compliance update reported more than 4.7 million accounts deactivated in the ban's first days, and by June the government put the total removed, deactivated or restricted above five million. eSafety's own evaluation found the share of under-16s holding a social media account fell from 52.4% to 42.1%. In September 2026 Parliament passed a further amendment to strengthen enforcement, under a bill the government introduced to double the maximum penalty.

10 DEC 2025

Minimum-age obligation takes effect for designated platforms

TEN PLATFORMS

Facebook, Instagram, Threads, TikTok, Snapchat, X, YouTube, Reddit, Kick, Twitch

JUN 2026

5 million+ accounts removed, deactivated or restricted (Government)

SEP 2026

Parliament passes a stronger-enforcement amendment

Think about what that means for a club. The junior fan, the junior player, and a good share of every junior family's attention can no longer be reached on the platforms most clubs treat as their main channel. For that audience the reach isn't throttled; it is legally closed. The obligations sit with the designated platforms, all of them social media services. A club's own app, its email list, its website and game day itself are not on that list, which makes them the only direct lines to the junior side of the base that remain open.

New Zealand's government introduced its own under-16 bill on 24 August 2026. It had not reached a first reading when Parliament rose in September, and two coalition partners have said they will vote against it, so its future rests with the government formed after the November election. A club that builds its junior relationship on owned channels now does not need to wait for that answer.

Social is the invite. Your Digital Clubhouse is where they belong.

The cost of staying unknown.

The damage from not knowing your fan is real but mostly invisible until it isn't.

SLOW CHURN

Fans who stop renewing without a clear cause, attendance that drifts, content engagement that fades. By the time it appears on a P&L, the relationship has been deteriorating for two or three seasons.

SPONSOR ATTRITION

Deals that don't renew, renewals at lower values, sponsors who walk because they couldn't justify the spend internally. The lost revenue is easy to count; the conversations that explain it usually aren't recorded.

GUT-FEEL DECISIONS THAT MISS

The jersey nobody wanted, the price rise that crossed a line, the comms campaign that landed badly. Each of these is recoverable individually. Collectively they erode trust with the people the organisation most needs to keep close.

A FAN BASE THAT DOESN'T FEEL KNOWN

Fans who feel like a database entry behave like one. Transactional, opt-out-prone, switchable. Fans who feel known behave like members of a community. Patient through bad seasons, loud advocates in good ones, willing to pay for things strangers wouldn't.

And the two ledgers move independently. The 2026 AFL season set the all-time home-and-away attendance record; the AFL Fans Association's 2025 survey measured fan satisfaction at 2.7 out of 5, its lowest recorded. Record crowds and record-low satisfaction are coexisting in the same competition right now. The turnstile counts bodies. It doesn't measure the bond.

The cost of not knowing your fan is paid a little every season: in margin that didn't compound, relationships that didn't deepen, and resilience that wasn't built.

Listening is how the relationship gets built.

There's a subtle point that the rest of this series depends on, and it's worth stating plainly: **the act of running a serious fan insight program is itself a relationship-building act.**

Fans don't experience being asked, listened to, and responded to as friction. They experience it as respect. Asking a fan what they think, and then visibly doing something about it, sends a signal that almost nothing else in the marketing toolkit can match. It says: you matter individually, your view is worth our time, and we are willing to change because of you.

The gap between what organisations believe about their fans and what fans actually experience is enormous, and it's growing. Medallia's 2026 State of Customer Experience Report surveyed more than 550 CX practitioners and more than 1,500 consumers. The headline finding: **66% of practitioners believe the typical experience of interacting with companies has improved over the past year. Only 17% of consumers agree.** That's a 49-point perception gap, and it's almost surgically aligned to the case in this briefing. Organisations think they know their fans. They don't.

The mechanism for closing that gap is human, not statistical. People give more to organisations that take their input seriously. Done well, a fan insight program is the conversation the organisation is always having with its fans.

66% of organisations believe experience is improving. Only 17% of their customers agree. That gap is what a fan insight program exists to close.

The data is the by-product. The relationship is the point.

SOURCES CITED

Sources cited.

AUSTRALIA'S SOCIAL MEDIA MINIMUM AGE (2025 TO 2026)

Online Safety Amendment (Social Media Minimum Age) Act 2024, with obligations in force from 10 December 2025 under the Online Safety Act 2021 and the Online Safety (Age-Restricted Social Media Platforms) Rules 2025. Ten platforms designated as of August 2026: Facebook, Instagram, Threads, TikTok, Snapchat, X, YouTube, Reddit, Kick, Twitch. Maximum civil penalty \$49.5m. Deactivation figure (4.7 million+ accounts in the ban's first days) from the eSafety Commissioner's March 2026 compliance update. "More than 5 million under-16s accounts removed, deactivated or restricted" and the proposal to raise the penalty "from \$49.5 million to \$99 million": Prime Minister's release, 28 June 2026. Online Safety Amendment (Strengthening Enforcement for the Social Media Minimum Age) Bill 2026: House agreed to the Senate message on 10 September 2026; the penalty as enacted is not cited here. Account-holding fall from 52.4% to 42.1%: eSafety evaluation, July 2026. New Zealand: Online Safety (Minimum Age and Child Safety Risk Assessment) Bill, introduced 24 August 2026; no first reading before Parliament rose on 24 September 2026.

SOCIAL STATUS (2026)

Facebook Organic Reach Rate monthly benchmark. The 5.2% figure is the mean of the January to July 2026 monthly figures; August and September read 5.04% and 4.16% (4 October 2026); method is organic reach divided by page followers, computed across the pages indexed by Social Status, a Brisbane-based analytics firm. The sample skews toward actively managed pages, so a volunteer-run club page likely sits below it.

AFL (2025, 2026)

Club membership record of 1,363,437, announced 22 August 2025, with the league noting one in 20 Australians holds a club membership; 2025 season attendance of 8,253,649 in the 2025 AFL Financial Result (November 2025); all-time home-and-away attendance record of 7,772,015, announced August 2026.

NRL / AUSTRALIAN RUGBY LEAGUE COMMISSION (2025, 2026)

Record 2025 season results announced 23 February 2026: total attendance of 4.98 million and revenue of \$845.6m. NRL ID reported past four million registered accounts (NRL, October 2025).

MCDONALD (2010)

McDonald, H., "The Factors Influencing Churn Rates Among Season Ticket Holders: An Empirical Analysis", *Journal of Sport Management*, 24(6), 676 to 701. About 4,570 season-ticket holders across two AFL clubs. Findings cited: churn rates often exceed 20%; new, low-attending members over five times more likely to churn than long-term frequent attendees; churn falls with each year of tenure, stabilising near 6% from year five against first-year rates near 30%.

Sources cited.

PLATFORMS, LEAGUES AND SPONSORS (2025 TO 2026)

Meta, "Introducing Meta One", 15 September 2026 (Advanced plan from US\$49.99 a month). NBL Group and Komo, multi-year partnership (Ministry of Sport, 13 August 2026). Cricket Australia and Komo (ChannelLife, 9 September 2026). New Zealand Rugby digital hub; NZR+ "attracted nearly 450,000 registered fans globally" (StopPress, 17 June 2026). World Federation of Advertisers, Global Sponsorships and Partnerships, 17 December 2025: more than 40 brand owners, over \$8.2 billion in sponsorship investment.

MEDALLIA (2026)

The 2026 State of Customer Experience Report, released 5 March 2026, based on surveys of more than 550 CX practitioners and more than 1,500 consumers plus benchmarks from 600+ anonymised Medallia customer programs. Findings cited: 66% of practitioners believe experience has improved over the past year while 17% of consumers agree; 30 to 40 per cent of departments that receive CX insights take no action on them.

AFL FANS ASSOCIATION (2024, 2025)

National fan surveys run by the independent AFL Fans Association. 2024 wave: 4,155 fans; about one in five planning to attend fewer games due to cost of living. 2025 wave: overall fan satisfaction 2.7 out of 5, its lowest recorded; one in five planning fewer games; 7% downgraded memberships; 4% cancelled. The 2025 wave's sample size was not disclosed at time of writing; treat its figures as the association reports them.

AUSTRALIAN SPORTS COMMISSION

2.9 million Australians volunteer in sport each year (AusPlay 2023; AusPlay surveys about 40,000 Australians annually). Cost of Sport study, conducted by Federation University for the ASC, released 31 August 2026: average entry-level cost (registration or membership, uniform, equipment) of \$1,161 for children and \$1,200 for adults.

Sources cited.

AUSTRALIAN SPORTS FOUNDATION (2023)

Clubs Under Pressure, May 2023, drawing on responses from about 3,000 community clubs: 63% named not having enough volunteers as their main challenge; 18% described themselves as at risk of collapse. The commonly used count of roughly 70,000 community sports clubs in Australia is the ASF's own figure.

SPORT NEW ZEALAND

Voice of Participant 2025/26, published 11 August 2026: 24,962 participants across 11 sports (playing members, not spectators). Findings cited: 84% likely to rejoin their club; 73% feel they get value for money; NPS of +44. Volunteering: more than one million New Zealanders volunteered to support sport and recreation in 2024 (Sport NZ).



ABOUT THIS SERIES

Know the case. Now build the **program.**

This briefing made the case for why a fan insight program matters. The companion guides show how to build, run, and sell one.

WHAT TO READ NEXT

Read The Listening Architecture next. It introduces the four-layer system that turns the case into an operating model.

COMPANION RESOURCES

00	The Fan Insight Playbook — the full operating manual	OPERATING PLAYBOOK
02	The Listening Architecture	FRAMEWORK GUIDE
03	Designing Each Listening Layer	DESIGN GUIDE
04	Eight Common Fan Problems	DIAGNOSTIC GUIDE
05	Operating a Fan Insight Program	OPERATIONS GUIDE
06	Fan Insight Templates	TEMPLATE PACK
07	Selling a Fan Insight Program	PITCH GUIDE

START THE CONVERSATION

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