ECONOMICS

The Price of Piracy

Hidden Costs of Illegal Streaming to the UK Economy

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We are an economics, data insights, policy and impact consultancy, but one that is a little different to many others. We draw on backgrounds in government and the private and charitable sectors to produce work designed to make a difference. We do not do research for research's sake. We are committed to ensuring that everything we do has an impact - which is part of the reason why we recently became a verified B Corporation.

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Contents

Executive Summary

Illegal streaming is a direct constraint on the growth potential of the UK's creative industries. It reduces the incentives for investment into domestic UK production, puts jobs at risk across the film and TV sector, and has knock-on impacts on the broadcasting, film and sports industries. At the same time, consumers are providing personal identification and payment details to criminals when signing up to illegal streaming services, opening themselves up to increased risk of fraud, scams and theft.

The economic, personal and societal costs of illegal streaming are significant. This report finds that illegal streaming results in losses of at least £1.35 billion to the UK economy each year, which has negative impacts on jobs and the Exchequer.

£1.35bn

Lost revenue of £1.35 billion a year translates into:

10,400 fewer jobs across the UK economy, including:

4,200 fewer jobs in the broadcasting and media production sectors

6,200 fewer jobs in other sectors, including sound recording and music publishing, advertising, publishing services, and retail sectors.

£366m

£366 million per year in lost revenue for the Exchequer is equivalent to:

651,000 NHS bed-days per year

9,400 qualified NHS nurses

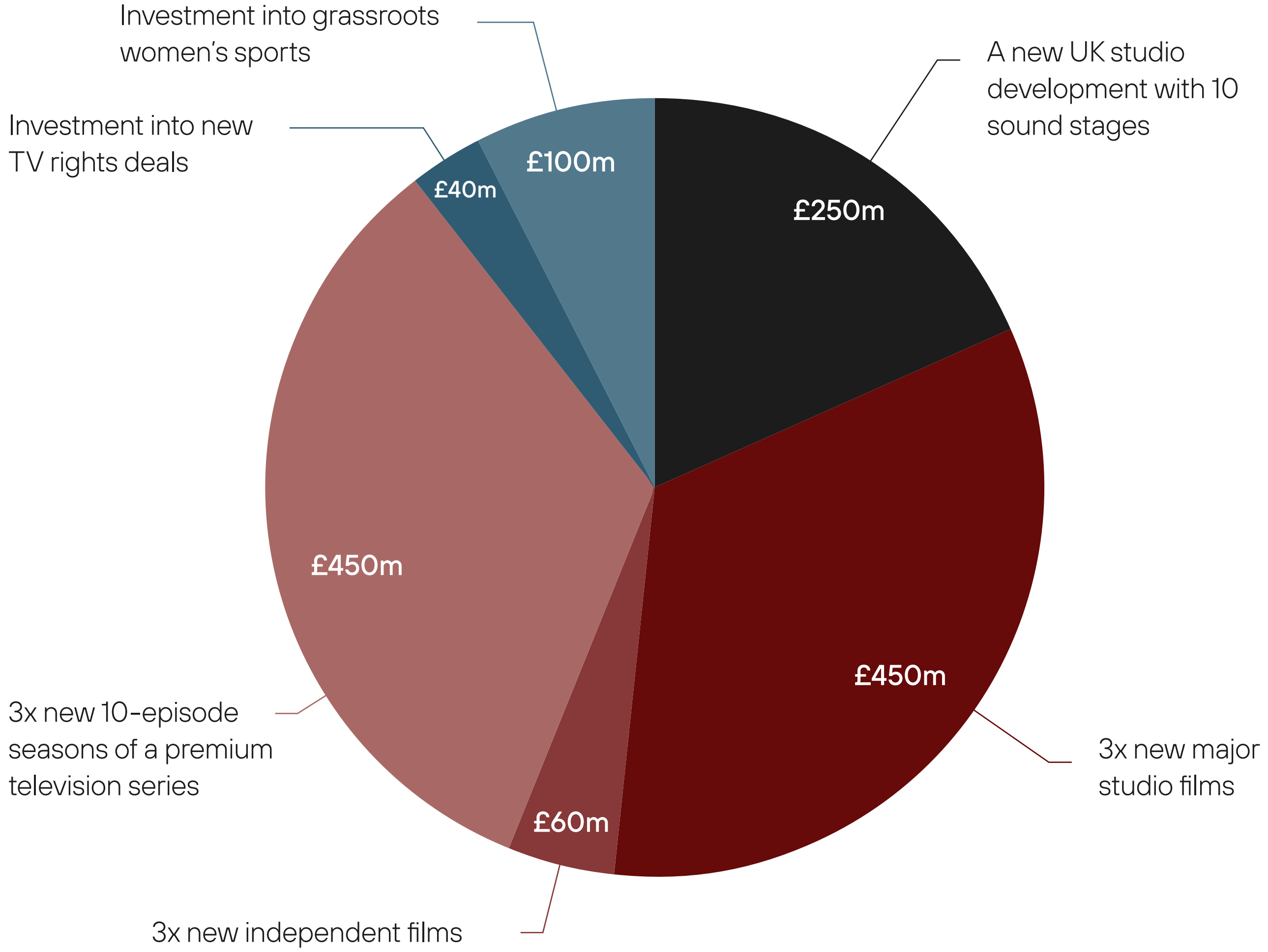
10,100 Police Community Support Officers

43 million funded childcare hours

140 million free school meals

Broadcasting and TV revenues are reinvested into commissioning new film and television programming, which support independent production companies, create jobs across the creative industries and help maintain the UK's position as a global production hub. In the sports sector, the value of broadcast rights deals help to sustain investment throughout the sporting ecosystem, not just at the elite level. Revenues generated from rights deals are redistributed by leagues and governing bodies to support professional competitions, invest in women's sport, develop young talent and fund grassroots participation.

An additional £1.35 billion in revenue could support:



Illegal streaming also has clear negative consequences for individuals who pirate content. Consumers who illegally stream content open themselves up to fraud and identity theft. We estimate they collectively experience financial losses of £270m a year. However, this is a conservative estimate, meaning that the true value may be higher. Organised criminal networks, that we know play a part in enabling digital piracy, use this income and consumer spending on content piracy to fund wider criminal activity.

With these significant costs in mind, this report uses primary research with consumers to understand their motivations and what could reduce their likelihood of illegal streaming. 42% of illegal streamers understand that their activity is ethically wrong. However, there is a dissonance between their beliefs and their actions, as more than half of those 42% say that they are likely to continue their activity.

What can be done?

To make a significant long-term impact on reducing the consumer and economic harms that piracy creates in the UK, action must be taken from two angles. First and most importantly, action that reduces demand for pirate services by educating consumers on the financial risks of piracy, and secondly, action that makes the supply of pirated content harder.

Governments across the UK should work with industry to provide a greater level of information about the risks of piracy.

The Government should amplify existing consumer awareness initiatives on piracy via their official channels and sponsored campaigns. Support from the UK Governments and devolved administrations would help extend the campaign's reach through trusted national, regional and local channels. This would make a significant impact in helping consumers across the UK understand the negative consequences that can come with illegal streaming.

The first piracy-focused campaign that Government could support is BeStreamWise. As an established cross-sector initiative, it offers a ready-made vehicle for coordinated consumer awareness activity. Its focus on the fraud, cyber security and consumer harms associated with piracy aligns closely with the objectives of Government's existing Stop! Think Fraud workstream.

Action must be taken by Government and industry to reduce the availability and visibility of pirate services.

A Government-backed anti-piracy strategy that actively seeks to make illegal content harder to access and less readily available could have a significant impact on infringement rates in the UK. With such a strategy in place, more than one in three active illegal streamers (34%) say that they would be likely to stop pirating content.

We encourage the UK Government and devolved governments to commit to working with industry to develop a voluntary, cross-sector framework that sets out a shared expectation for platforms, connectivity providers and content services to work together to take action against illegal streaming. The framework would support collaborative, proportionate action, with measures developed jointly in Government-chaired roundtables and tailored to the role and responsibilities of different parts of the ecosystem.

Supported by a dedicated policy directorate within the Supported by a dedicated policy directorate within Department for Business, Innovation, Science and Trade (BIST) or Department for Digital, Culture, Media and Sport (DCMS), and informed by engagement with devolved administrations, this approach would enable stakeholders to contribute in a way that reflects how their platforms are impacted by piracy, while supporting a material effort to work together to prevent illegal streaming.

1. Introduction

Engaging with the UK's creative industries and sports sectors is a big part of what makes us all tick. For many, the latest film release, the big match or the latest bingeworthy series to stream are a fundamental part of our lives; building friendships, rivalries, shared cultural references and a sense of belonging.

So, it is no surprise that these sectors form a major part of our economy and society. Overall, the film and television production sector contributed £23.5 billion to the UK economy in 2024, while the sports sector contributed over £20 billion during the same time period.[1] The same sectors employed over 800,000 people in 2024,[2] with the film and television production sector alone employing over 250,000 people.[3] £6.8 billion was spent on the production of film and high-end TV in the UK in 2025, with inward investment delivering 85% (£5.8 billion) of combined production spend.[4]

In this context, the Government is right to be committed to growing and strengthening these sectors. The 2025 Creative Industries Sector Plan explicitly seeks to make the UK the world's "number one destination" for investment in creativity and innovation,[5] and the Government's Plan to Change allocates over £900 million in funding to support major and grassroots sporting events, and investment in grassroots and community sports across the country, over the course of this Parliament.[6]

However, content piracy is a direct constraint on the growth potential of these sectors. In order for the UK's creative industries to remain globally leading more needs to be done to address the persistent and cultural issue of illegal streaming. This report uses original primary research into the prevalence of, and attitudes towards, illegal streaming to understand its scale and nature, as well as the potential economic, personal and social costs that are associated with it.

The importance of the film and television and sports sectors to the UK economy:

Source: DCMS Sector Economic Estimates, 2024

Film and television	Sports
£23.5 billion GVA	£20.6 billion GVA
250,000 jobs	560,000 Jobs

2. The scale and nature of illegal streaming in the UK

What is the scale of piracy in the UK?

Many people in the UK illegally stream content. Almost one in three (31%) UK adults say they have used illegal streaming to access content within the last three months[7]: 27% have illegally accessed creative media[8] content and 18% have accessed live sports.

Those who pirate content do so regularly, with a large majority (76%) of illegal streamers doing so at least every month and nearly half (46%) of all active illegal streamers reportedly streaming content illegally weekly.

Pirating / illegal streaming is defined as accessing TV shows, films and live sports through means other than official sources, including:

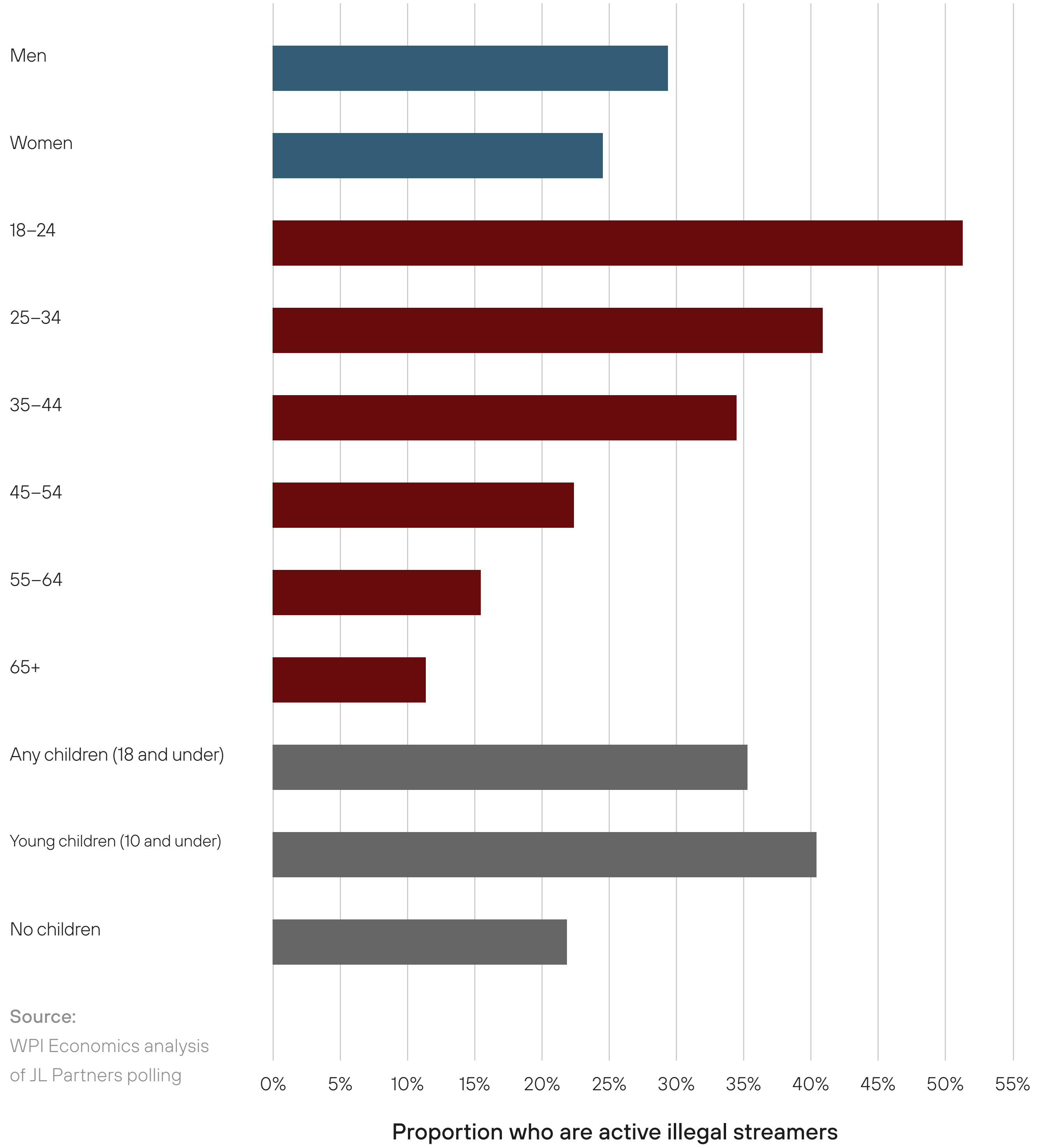
1. Using a device such as an Amazon Firestick or Google Chromecast to access unofficial sources of content;
2. Downloading or streaming through unofficial websites or file-sharing / torrenting services;
3. Watching live sports through unofficial websites and links;
4. Accessing content only available in other countries using a VPN;
5. Watching via social media platforms.

Who is pirating content?

Active illegal streamers are more likely to be younger, with just over half (51%) of people aged 18-24 illegally streaming content compared to just 15% of people aged 55-64 and 11% of people aged 65+. There is also a slight difference in illegal streaming prevalence between genders, with 29% of men as active illegal streamers compared to 25% of women.

Interestingly, we also found that levels of piracy varied depending on whether respondents had children in their household. Two in five (40%) people with young children in their household (children aged 10 years old or below) reported actively streaming illegally, compared to just 23% for those in households without children.

Demographics of active illegal streamers



Source:
WPI Economics analysis of JL Partners polling

What content is being pirated?

Although many assume that illegal streaming is mostly an issue for live sports, our research has found that almost **9 in 10 (88%)** active illegal streamers illegally stream film and television shows compared to **3 in 5 (60%)** who illegally stream live sports.

The most popular form of creative content to pirate for illegal streamers is television shows, with 72% having done so, followed by films (69%).

Looking more granularly at the television shows that are pirated, 56% of active television illegal streamers have illegally streamed dramas and 52% have pirated comedy and entertainment shows; also popular are reality TV shows (34%) and documentaries (32%).

By far the most popular sport to pirate is football, with 91% of illegal streamers of sports reporting that they watch football, followed by boxing (40%), Formula 1 (36%) and tennis (34%). This broadly reflects the viewing preferences of the general population. Survey results show that movies (68%), drama (60%) and comedy and entertainment (51%) have the largest audience share when legal-only streamers are also taken into account, and similarly with football (88%), Formula 1 (37%) and boxing (34%).

The survey found that women were much more likely to pirate dramas than men (62% of female illegal streamers versus 44% of male illegal streamers), while the opposite trend was observed in sports (63% of male illegal streamers versus 26% of female illegal streamers).

How is content pirated?

There are several different methods used by people to pirate content. Some methods are more clearly illegal to consumers because they involve actively seeking out - and often purchasing unofficial sources, e.g. 'hacked' devices or IPTV subscription services. However, other methods may not feel illegal to the user - even though they are - because they are similar to their regular behaviours, e.g. using social media to access pirated content.

This is borne out in our research that shows that a majority (54%) of active illegal streamers access illegal content via social media platforms, compared to just 26% who access using purchased devices and illegal subscription services, and 28% streaming or downloading via unofficial websites. Less popular methods included downloading content via torrents or cloud sharing services (15%), and illegally buying logins or passwords for legal services (7%).

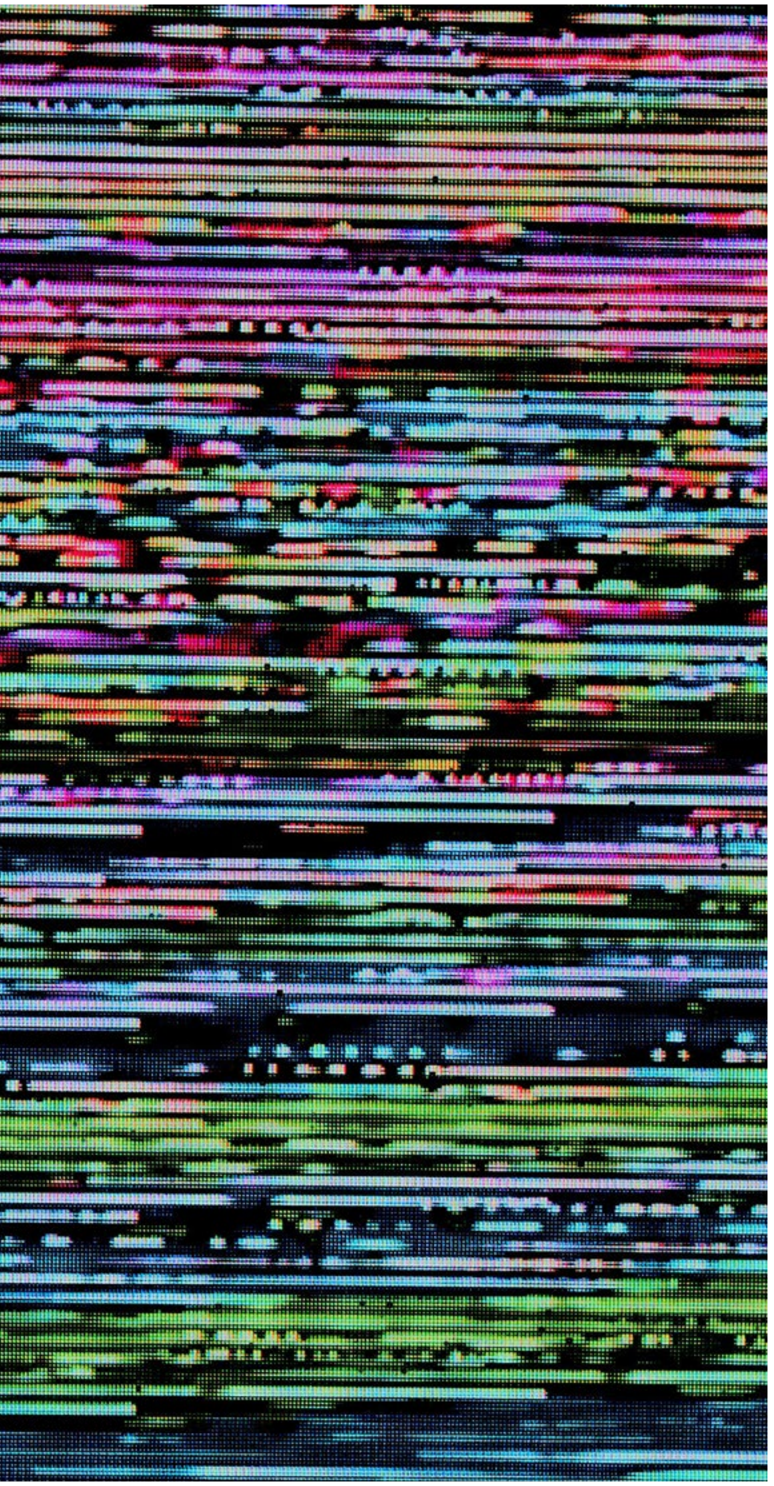
Justifications for pirating content

73% A significant majority of non-illegal streamers believe that illegal streaming is ethically wrong.

However, more surprising is the fact that our research shows that more than four in ten (42%) of those accessing content illegally also believe that illegal streaming is ethically wrong.

When probed on why they streamed despite believing it to be wrong, the most common justification given (38% of illegal streamers) was that illegally streaming content is cheaper than acquiring it legally. Illegal streamers also justified themselves by appealing to the convenience of piracy (31%), their desire to avoid subscriptions (24%), and the difficulties that exist when trying to access some forms of content in the UK (15%).

3. The economic and personal costs of illegal streaming in the UK



The most obvious impact of illegal streaming is lost revenue for broadcasters. However, the true costs are spread much further. Lost revenues reduce the incentive to invest further into the UK broadcast and production industry, and subsequently lead to a reduction in growth and fewer jobs. In turn, lower revenues reduce reinvestment into commissioning new film and television programming, which supports independent production companies, creates jobs across the creative industries and helps maintain the UK's position as a global production hub.

In the sports sector too, the value of broadcast rights deals is redistributed by leagues and governing bodies across the sporting ecosystem to support professional competitions, invest in women's sport, develop young talent and fund grassroots participation. Taken together, all of this impacts economic output and future growth prospects in industries where the UK has a major competitive advantage. There are also obvious negative impacts on tax revenues received by the Exchequer.

The impacts are also felt by consumers who illegally stream content. By opening themselves up to potentially malicious websites, illegal streamers put themselves at increased risk of identity theft, stolen data and financial fraud. The figure below demonstrates these and a wider range of potential negative impacts of illegal streaming on consumers themselves, as well as the economy.

The direct economic costs

With 16.8 million people in the UK saying that they stream illegally, the potential lost revenues are significant. Overall, our estimates show that £1.35 billion in revenue for the broadcasting industry is being lost each year in the UK due to illegal streaming, although this will also have wider impacts on a range of other sectors - meaning that the total revenue impact will be higher.

The logic model below shows the routes through which different activities lead to different impacts and several of these in turn impact on jobs and tax revenue. Analysis by WPI Economics shows that the loss in revenue has a direct impact of an estimated 10,400 fewer jobs across the economy, including 4,200 fewer jobs in the broadcasting and media production sectors and 6,200 fewer jobs in other economic sectors, including the sound recording and music publishing, advertising, publishing services, and retail sectors.[9] The loss in revenue also has an impact on public finances, with taxes for the Exchequer estimated to be some £366 million lower than would be the case if that revenue were not lost.

TOTAL LOST REVENUE

£1.35 billion

COMPRISES

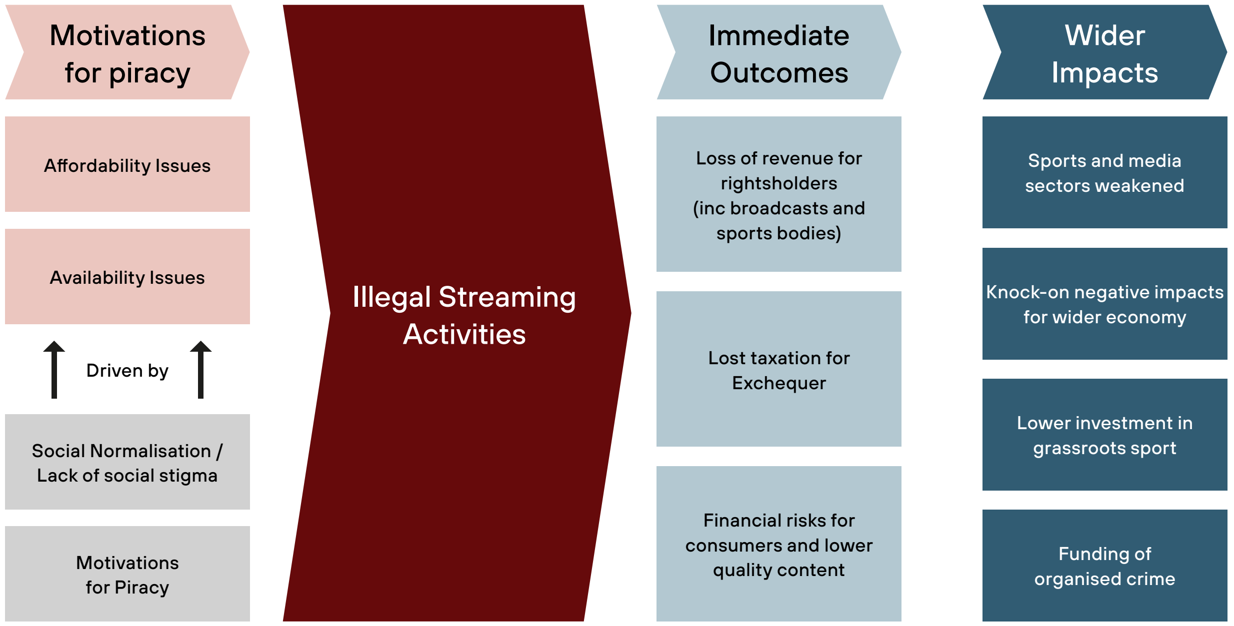
£700m

lost due to illegal streaming of Live Sports

£653m

due to illegal streaming of Film & TV.

Logic model of how consumer piracy impacts the economy and people



Lost revenue from illegal streaming translates into:

4,200
fewer jobs in the broadcasting and media production sectors

6,200
fewer jobs in other sectors, including sound recording and music publishing, advertising, publishing services, and retail sectors

£366m
in lost taxes for the Exchequer

Difficulties for workers in the creative industries due to illegal streaming

Piracy harms far more than broadcasters and film companies. Consumers accessing content via illegal streaming also causes difficulties for workers in the creative industries. Many illegal streamers - including those spoken to for this research - justify their pirating of content because content creators are very wealthy (e.g. film directors, actors) or those who are impacted are multi-million pound corporations.

However, piracy has a negative impact throughout the supply chain of the creative industries. A loss of revenue as a result of piracy can cause production companies to stop production and ultimately lead to job losses - and this won't be just for the headline talent. Creating content involves an army of workers involved across a range of roles, e.g. production, design, publishing, advertising etc, and their livelihoods are at risk from piracy.[10]

The broader economic cost of illegal streaming

The impact of illegal streaming on revenue, jobs and the Exchequer is clear. However, this underplays the impact of what that revenue could be used to deliver. If, instead, this £1.35 billion were available for investment in the UK, this could have significant impacts on the broadcasting and production industries, the wider economy and jobs, and the UK's position as a "global creative superpower".[11]

Film and television production capacity: The UK has a projected 6 million sq. ft. shortfall in studio space.[12] This could be tackled through investing in new state-of-the-art studio developments made possible by the additional revenue gained from tackling illegal streaming.

Film and television content development: The UK is a global leader in developing films and television shows. Additional revenue could cement its place as a world-leading production hub for the film and television industry by allowing for the production of more major studio blockbusters and premium television series, as well as fostering local talent and creativity through making studio space more available for independent films.

Investment into professional and grassroots sports: Investment into sports remains a priority for the UK government, which recently pledged £500 million for delivery of major sporting events hosted in the UK and £400 million into new and upgraded grassroots sports facilities.[13] The additional revenue from tackling illegal streaming could help build on this through further investment in professional sports via television-rights deals and direct investment by the broadcasting industry in support of grassroots-sports initiatives, especially for women's sports, which is a huge potential area of growth.

£1.35 billion extra revenue could equate to:

Greater film and television production capacity in the UK[14] with:

5×
new studio developments with 10 sound stages each and a total of 2 million sq.ft. of studio space

Or more film productions in the UK[15] with:

8×
new major studio films

8×
new independent films

Or more television production in the UK[16] with:

9×
new 10-episode seasons of a premium television series

Or a combination of all of the left

1×
new studio development with 10 sound stages (£250m)

3×
new major studio films (£450m)

3×
new independent films (£60m)

3×
new 10-episode seasons of a premium television series (£450m)

PLUS investment into professional and grassroots sports, for example:

£40m
investment in new TV rights deals

£100m
investment into grassroots women's sports

CASE STUDY:

Neil

Neil is a football fan who began using unofficial streaming services to access live sport at lower cost.

After upgrading an unofficial streaming service through PayPal, unauthorised transactions totalling £2,500 were taken from his account. Beyond the financial loss, the incident created significant stress while he worked to recover the funds and left him more cautious about online security and unofficial streaming services.

£366m

Lost revenue for the Exchequer is equivalent to:

651,000
NHS beds per year

43 million
funded childcare hours

9,400
qualified NHS nurses

140 million
free school meals

10,100
Police Community Support Officers

Costs to consumers

Alongside these large economic costs, illegal streamers also open themselves up to a range of negative impacts, which can lead to significant financial losses.

> "Looking back now, I would have probably thought twice if there was more awareness campaigns out there."

Research for this report considered a narrow definition of harm related to scams, theft or identity theft. This found that financial losses for illegal streamers could total £270 million per year, and some consumers had losses of up to £5,000. Previous research that looks at a broader definition of financial scams has shown that losses can average around £1,680 per person.[17]

By opening themselves up to fraud and identity theft, illegal streamers experience financial losses of £270 million a year.

The most common route of attack for scams, fraud and identity theft is tricking illegal streamers into installing malware. A recent report on the dangers of malware when pirating content for the AAPA showed that 57% of illegal devices and IPTV apps contain malware.[18] Research has also found that 90% of illegal streaming sites are risky, i.e. contain malware or inappropriate content, and that banking trojans - malware designed to steal bank details - are prevalent.[19] Evidence from the United States found that 44% of people who have visited a piracy website have experienced identity theft compared to just 10% of those who have not visited illegal streaming sites.[20]

Research for this report found that more than a third (37%) of illegal streamers have been exposed to negative or dangerous content as a result of their illegal streaming activities, including 30% who have been exposed to malware, viruses and pop-up ads and 11% who have been exposed to what respondents consider to be inappropriate content.

UK content illegal streamers spend £1.2 billion each year funding organised criminal networks

More broadly, over a quarter (28%) of active illegal streamers are paying to access content illegally. Our research estimates that in total, £1.2 billion is being spent on content piracy each year, which acts as a source of funds for organised crime, with potentially significant societal harm.[21] Malware installed on computers as a result of piracy is also allowing organised criminal networks to use the IP addresses of pirating consumers to mask their illegal activities including undertaking cyber-attacks and committing fraud.[22]

CASE STUDY:

Amelia

Amelia is a mother and regular streaming user who turned to unofficial streaming services and modified Fire Sticks to access a wider range of content at a lower cost. After purchasing a modified Fire Stick and later using unofficial streaming sites, she experienced fraudulent payment attempts, account compromise and the hacking of her Facebook account.

Amelia was shocked to discover that paying for illegal streaming can be a source of funds for organised crime, as it wasn't something she had considered. She says that if she had known that that was the case, she wouldn't have streamed illegally.

> **On the links with organised crime:**
>
> "I didn't know that that was the case, actually... it's a bit of a shocker. I just wouldn't equate the two."

4. Tackling illegal streaming

Tens of millions of pounds are already spent on anti-piracy activities every year by rightsholders and across industry. However, despite this spending, this report has shown the severe damage to the economy and consumers that continues as a result of illegal streaming. Current powers to tackle piracy under the Copyright, Designs and Patents Act (1988) and the Digital Economy Act (2017) are focused on shutting down the supply of content piracy and prosecuting distributors of illegal content. However, it has been insufficient in preventing the growth of content piracy because there is a lack of consumer awareness of the dangers of illegal streaming.

As a result, further action is required to achieve the Government and industry's growth ambitions for the creative and sports sectors and to ensure consumers are protected from harm. Government and sectors across the economy that are impacted by piracy must work closely together to tackle illegal streaming through a coordinated and concerted set of actions.

What can be done?

With such a large economic and social cost to pirating content, and 42% of illegal streamers believing their activity is ethically wrong, there is a clear opportunity for action to reduce illegal streaming. However, based on their existing experiences, and despite the risks associated with illegal streaming, over half (52%) of active illegal streamers state they are likely to continue pirating content. This means something needs to change.

To make a significant long-term impact on reducing the consumer and economic harms that piracy creates in the UK, action must be taken from two angles – one that reduces demand for pirate services by educating consumers on the financial risks of piracy, and one that seeks to prevent the supply of pirated content in the first place:

Demand: Consumers should be provided with a greater level of information about the risks of piracy.

Supply: The availability and visibility of pirate services that both expose consumers to harm and undercut the success of the UK economy must be significantly reduced.

Our research has shown that an anti-piracy strategy that makes illegal content harder to access and emphasises the dangers of illegal streaming could have a significant impact.

Recommendations

UK Governments should amplify existing consumer awareness campaigns via their official channels

Government has long launched consumer campaigns to successfully drive behavioural change and promote important policy messages. UK Governments should amplify existing consumer awareness campaigns via their official channels on the economic costs individuals open themselves up to when they pirate. This would make a significant impact in helping consumers understand the negative consequences that can come with illegal streaming.

The first piracy-focused campaign that Government could support is BeStreamWise. As an established cross-sector initiative, it offers a ready-made vehicle for coordinated consumer awareness activity. Its focus on the fraud, cyber security and consumer harms associated with piracy aligns closely with the objectives of Government's existing Stop! Think Fraud workstream. Amplifying BeStreamWise's data and insights would be an 'oven-ready' move that would be game-changing in signposting the risks of piracy, including the potential fraud and data security risks, and would begin to combat the £270m of financial harms illegal streamers face each year.

Develop a voluntary, cross-sector framework that sets out a shared expectation for platforms, connectivity providers and content services to work together to take action against illegal streaming

We encourage UK Government and devolved administrations to work with industry to develop a voluntary, cross-sector framework that sets out a shared expectation for platforms, connectivity providers and content services to work together to take action against illegal streaming. The framework would support collaborative action, with measures developed jointly in association with Government and tailored to the role and responsibilities of different parts of the ecosystem. This approach would enable stakeholders to contribute in a way that reflects their capabilities, while supporting a shared ambition to reduce consumer harm.

Areas where collaboration could support progress include:

1

Addressing repeat bad actors:

Strengthening approaches, including a greater Home Office focus on fraud linked to piracy, to prevent persistent bad actors from continuing to upload or distribute infringing content, particularly where user accounts have previously been subject to enforcement action.

2

Content protection and detection:

Exploring how existing technologies and tools can be further utilised to help reduce the availability of infringing content across services, including through collaboration between rightsholders and platforms.

3

Transparency and shared insights:

Developing ways to share high-level, aggregated insights on trends in access to illegal streaming services, in a proportionate and responsible manner. Improved transparency would support a shared understanding of the issue and inform more effective collective responses.

Such a framework should be supported by a specialised policy directive within DBIST or DCMS, so as to ensure activity in this area can make the most impact possible. Together, these efforts would help reduce consumer exposure to harm and provide a practical foundation for ongoing collaboration between industry and Government.

These recommendations will not, by themselves, eradicate digital piracy in the UK. However, they represent an important first step towards reducing its scale and impact. By tackling piracy more effectively, the UK could unlock an extra £1.35bn per year, supporting a steady stream of investment, jobs and growth across the creative industries and beyond. At the same time, consumers would be better protected from fraud, scams and increasingly sophisticated cyber threats. Through constructive collaboration and partnership between Government and industry, the opportunities created by reducing piracy – both from a societal and economic perspective – are clearly a dividend worth pursuing.

Endnotes

1 DCMS Sector Economic Estimates: Gross Value Added, 2024
2 DCMS Sector Economic Estimates: Employment, 2024
3 British film and high-end television: Government Response
4 Official BFI statistics reveal £6.8 billion film and high-end TV production spend in the UK
5 Creative Industries Sector Plan
6 Game changer for the nation
7 Findings in this report are based on a public poll of 2,501 consumers by JL Partners asking about their viewing habits, illegal streaming activities and attitudes towards content piracy. The polling was conducted between 03/02/2026 - 11/02/2026.
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