

Understanding the sports piracy landscape:

Who? How? Why? What?

13 December 2023

Introduction

Sports piracy is not a new problem for the industry, but with the advent of new technological solutions for illegally watching sport, and increasing cost of subscriptions for fans, the issue is becoming more pressing for the sports industry to tackle.

In collaboration with Unofficial Partner Productions for their hit podcast series 'The Pirates vs The Premier League', YouGov conducted research to gain a better understanding of the current sports piracy landscape in the UK.

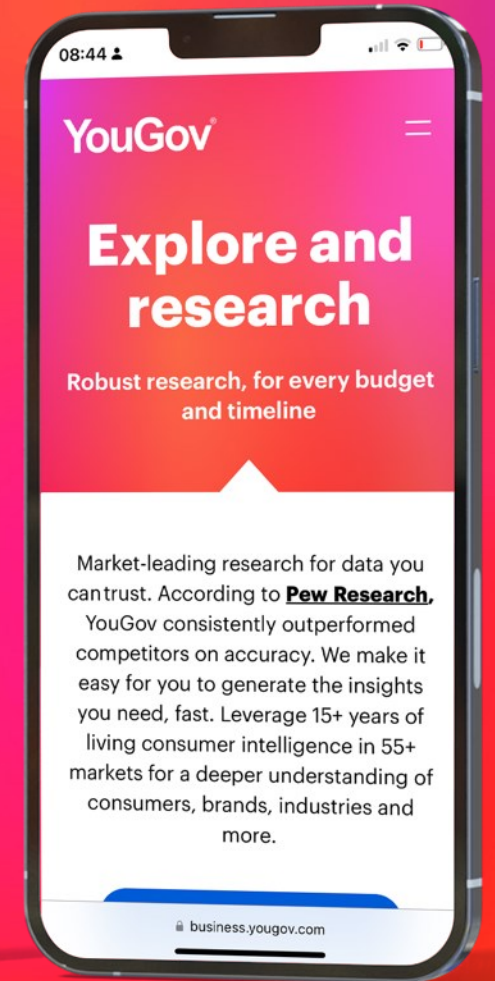
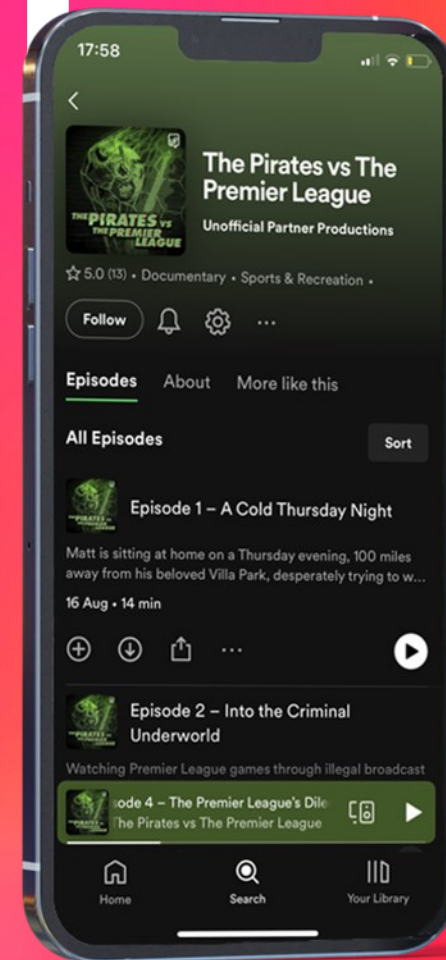
In this report, YouGov sets out to understand the true scale of the problem, as well as the profile, behaviours and attitudes of those who are engaging in this illicit activity.

We explore the demographic make up of sports pirates, what sports content they are watching, the methods through which it is being done, as well as their level of concern of any threats of legal action against them.

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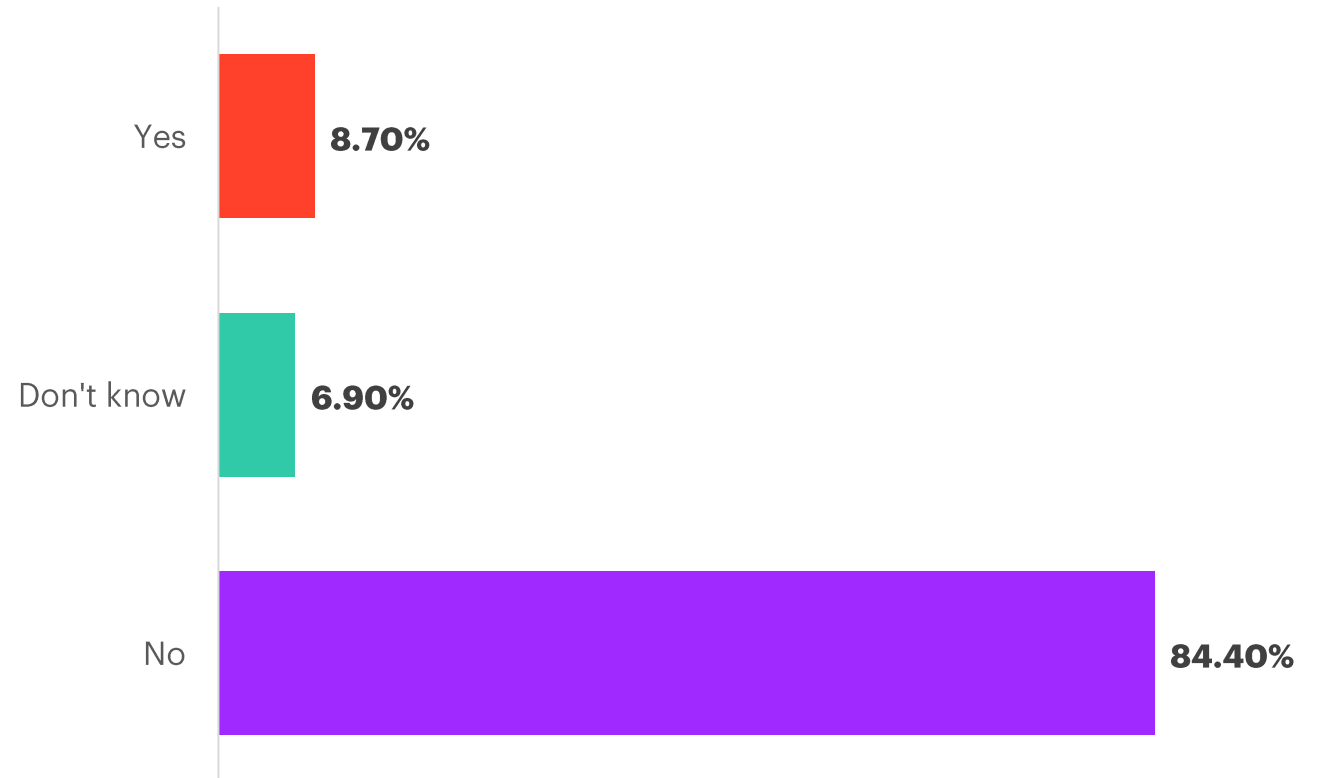
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Scale of the piracy problem is bigger than previously thought, with at least 4.5m UK adults having watched sports illegally in the last six months

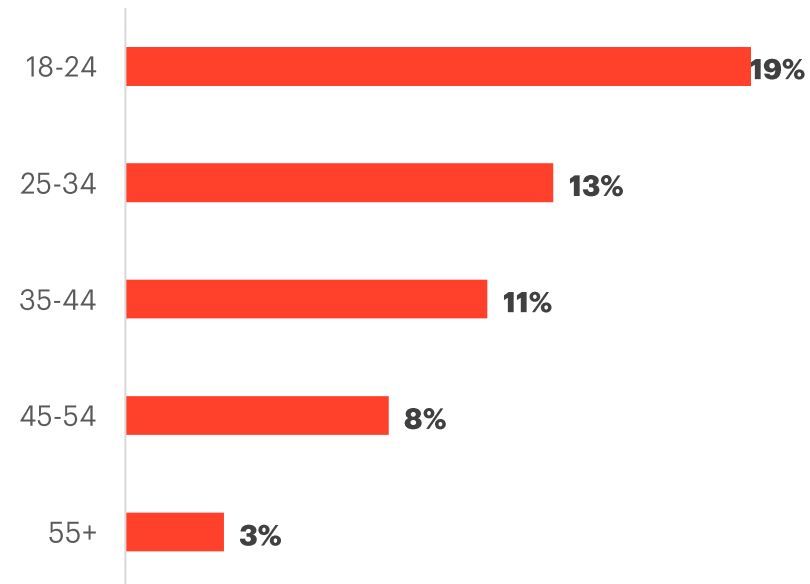
Have you watched live sport through an illegal broadcast feed in the last six months?



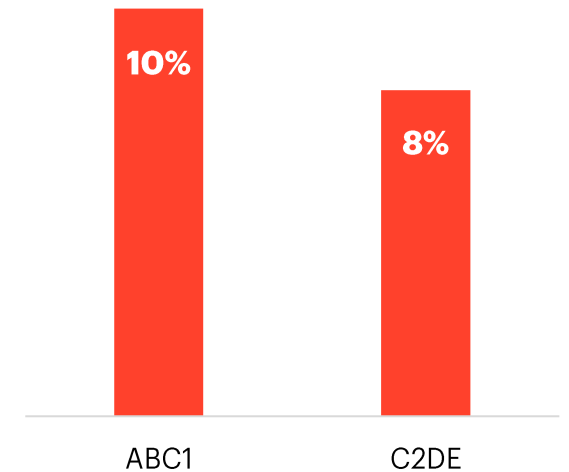
Sports pirates skew younger, however those in older age groups are also engaging in this activity. They are more likely to belong to higher socio-economic groups, suggesting affordability of subscriptions is not the only driver of this activity.

Have you watched live sport through an illegal broadcast feed in the last six months? **Yes**

Age



Social grading



Football is the dominant property for pirates, reflecting its dominance in the UK sporting landscape. Combat Sports also rank highly for illegal broadcasts, where there is a prominence of pay-per-view events, demanding high one-off fees from fans.

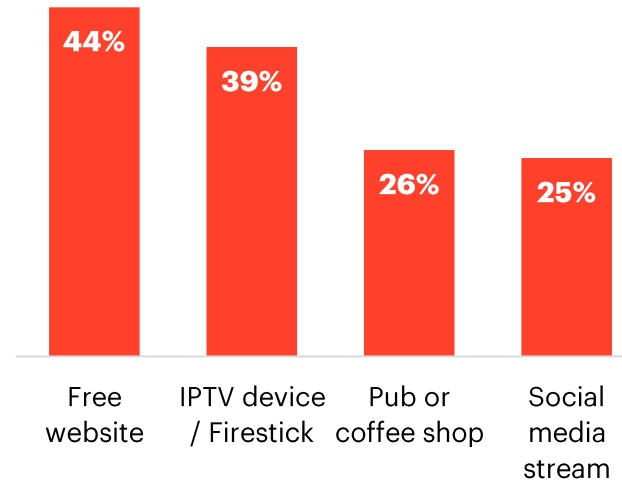
Which of the following sports have you watched an illegal broadcast of in the last six months?

Rank	TV	Streaming	Illegal broadcasts	
1	Football	Football	Football	← 73%
2	Cricket	Boxing	Boxing	← 24%
3	Motorsports	Motorsports	MMA	← 15%
4	Tennis	Cricket	Motorsports	← 12%
5	Rugby Union	Rugby Union	American Football	← 9%

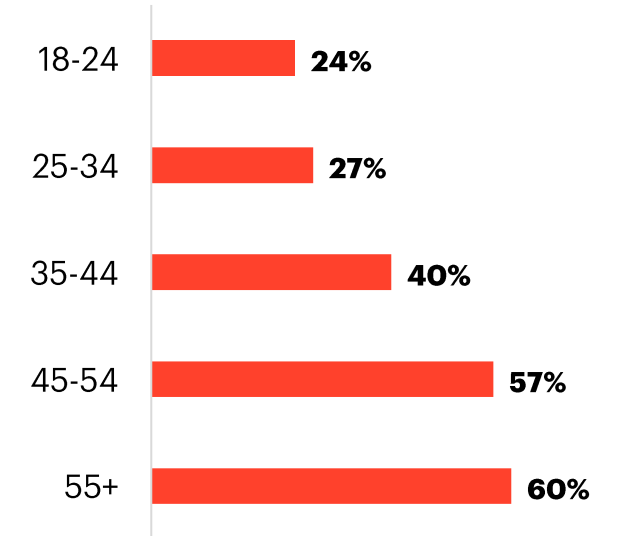
The use of Firestick devices is now widespread, with this being the chosen method for older sports pirates. 1 in 4 are also watching sport illegally in public places, such as pubs or coffee shops.

Which of the following sports have you watched an illegal broadcast of in the last six months?

Method of pirating live sport



IPTV / Firestick user age



Accessibility and affordability are the two main drivers given for this behaviours, with 1 in 3 sports pirates also paying for a Sky Sports subscription. Older sports pirates are the least concerned by the threat of legal action for engaging in this behaviour.

1 in 3

sports pirates also pay for a Sky Sports subscription
(twice as likely as average person)

Source: YouGov UK Omnibus, 3^d October 2023
Base: 2000 Nationally Representative Adults (16+)

Why do you watch sports illegally?

I couldn't afford to watch on the legitimate platform



What I wanted to watch wasn't available in the UK



I was watching with someone else who accessed the broadcast



I could afford to watch the event on the legitimate platform, I just didn't want to



As a pirate of live sport, how concerned are you by the threat of legal action for streaming sports illegally?

	18-24	25-34	35-44	45-54	55+
Concerned	38%	48%	22%	17%	12%
Not concerned	57%	44%	58%	77%	77%
Don't know	6%	8%	20%	7%	11%

Key Takeaways

- The scale of the sports piracy problem is bigger than previously thought – with at least 4.5m illegal streamers in the UK.
- Sports pirates skew younger but are also more likely to belong to higher socio-economic groups, suggesting ability to pay is not the only driver.
- Football is the dominant sport for illegal streamers, reflective of its dominance more widely in the UK. It is followed by combat sports, with these sports often employing a PPV broadcast strategy.
- The use of Firestick devices is now widespread in the UK, with this being the chosen method for older sports pirates. 1 in 4 also watch sports illegally at public venues.
- Accessibility and affordability are the two main reasons given, with older sports pirates the least concerned by their actions.
- 1 in 3 sports pirates also pay for a Sky Sports subscription – this is roughly twice the proportion of the total population that does.

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