

National
Theatre

Filmed theatre

and UK
audiences

February 2026

indigo



Executive

Summary

The National Theatre commissioned independent research and strategy agency, Indigo Ltd, to carry out a five-month research project to understand the role filmed theatre plays in audiences' lives and in the ecosystem of theatre in the UK. Indigo work exclusively in the arts and culture sector, equipping organisations to thrive by bringing audiences into their decision-making.

The National Theatre is an industry pioneer in filmed theatre. Over 15 years ago, the National Theatre was one of the first UK arts venues to broadcast theatre live, directly from its stages to local cinemas, and was first to launch its own streaming service - National Theatre at Home - during the global pandemic in 2020.

Over the past five years, the experience economy has been rebuilding and offering ever greater choice to our audiences. Meanwhile they continue to navigate cost of living challenges and major shifts in lifestyles and behaviour. In this context, understanding how filmed theatre intersects with in-person theatre is key to potential growth within our industry and our audiences.

This Executive Summary outlines the key findings and recommendations from this new comprehensive study of filmed theatre, drawing on insights from industry leaders, existing audience data, new audience interviews and over 5,500 UK survey respondents from National Theatre audiences (43% or responses), Indigo's nationwide Audience Panel (55% responses) and partner theatre customer lists (2% responses).



1

Filmed theatre increases overall engagement with theatre.

Both cinema and streaming lower the barriers for audiences to try new theatre productions, and encourage audiences to engage more frequently than they can in person. Both cinema and streaming audiences described the benefits of discovering new performances they had not previously considered, watching more than they could in person, and trying new things at lower risk. Rewatching things they had enjoyed in person was also a significant benefit for filmed theatre audiences.

Audiences are driven by rational and practical concerns about price and travel, particularly audiences outside London and the South East. A trip to London to see a high-profile show can cost a significant amount. In addition, the majority of regional audiences had a strong preference to watch theatre in their local area or region, considering London/West End a 'treat'. For many, this limited their opportunity to see all the in-person theatre they would like to, so filmed theatre offers them an additional opportunity for engagement.

When engaging with filmed theatre, the National Theatre brand offers audiences reassurance, supporting increased engagement. Three-quarters of audiences saw the National Theatre as a guarantee of quality, encouraging experiment and trial.

The broad benefits of watching filmed theatre, combined with the preference for watching in-person where possible, suggests that filmed theatre can deliver more engagement of theatre experiences overall, growing and expanding the ecosystem of UK theatre in addition to in-person attendance.



Filmed theatre grows and expands the UK theatre ecosystem



Over half of audiences **discovered performances** they hadn't considered before **through filmed theatre**



Nearly half said they could **watch more often**

A third of cinema audiences and half of streaming audiences enjoyed **rewatching productions** they had seen in person.

Filmed theatre plays a role in democratising access to theatre.



Over half of under 35s had streamed theatre over the last 12 months: the highest of all age groups

A third of under 35s had attended filmed theatre in the cinema



■ 20% of streaming audiences are disabled, compared to ■ 15% for both in-person and cinema attendance



Filmed theatre extends the reach and inclusivity of theatre. Those who are only engaging with filmed theatre are often those who face higher barriers to in-person attendance: cinema and streaming ensures they can still experience theatre in their lives.

As well as offering access to those facing higher barriers to in-person attendance, filmed theatre offers new ways to think about audiences. As a sector, we can respond to the increased power of the audience in the process of experiencing theatre, creating new ideas about theatre for future audiences

Filmed theatre has the potential to attract younger audiences. Filmed theatre skews younger than in-person - streaming markedly so, with over half of under 35s streaming theatre in the last 12 months. Although the cinema audience tends to be older, a third are under 35. Fleabag and Prima Facie are good examples of titles that were effective in developing new and younger audiences to filmed theatre in cinema and streamed online.

Filmed theatre is also more inclusive of disabled audiences. Streaming attracts a higher proportion of disabled audiences than in-person and cinema. Audiences with access requirements identified significant inclusivity benefits of the filmed theatre experience, from seating issues, to captions, sound volume to the ability to move around.

Filmed theatre - in particular streaming - hands over more flexibility of the experience to audiences, showing alternative ways people want to consume theatre. Given the need to develop audiences of the future and to increase the inclusivity of our offer, this shift in power offers opportunities to engage and develop theatre audiences in new ways.



Filmed theatre allows audiences to experience theatre they otherwise would not



Inter Alia, National Theatre, 2025 © Graham Pearson



The Importance of Being Earnest, National Theatre, © Marc Brenner



Vanya, Duke of York's Theatre, 2023 © Marc Brenner



3

Filmed theatre is highly unlikely to have a cannibalising impact on in-person theatre.



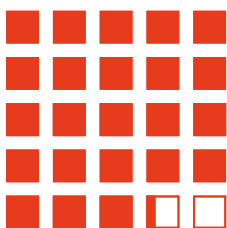
The research showed that live theatre is the preferred experience for almost everyone. Filmed theatre audiences are generally highly engaged in-person theatregoers. There is very little evidence that filmed theatre reduces in-person attendance of theatre overall.

If all options were available to audiences - watch a play in theatre, in the cinema or online - around 9 in 10 people chose in-person theatre as their preference.

However, if they were unable to attend in person, due to location, access requirements, cost or lack of ticket availability, filmed theatre allowed them to experience theatre they otherwise would not.

There was some evidence of a limited amount of substitution locally. This only tended to be reported where live drama provision (in particular) was limited or perceived as poor quality, and filmed theatre provided an opportunity to see high quality drama conveniently, particularly for older people. It did not replace all in-person attendance, but was on occasion preferred based on a quality judgement of in-person alternatives. It was still far more likely for someone to increase overall engagement through filmed theatre than to be directly replacing in-person attendance with filmed theatre.

As well as offering many of the same perceived benefits as in-person attendance, filmed theatre offered people alternative benefits, including convenience, proximity, affordability, personal comfort, flexibility in how to watch, and risk reduction when trying new things. Cinema offers a social aspect for audiences (similar to in-person attendance), whereas streaming offers a tailored, audience-directed and convenient way to watch.



93% of survey respondents who saw at least one filmed theatre production in the cinema or via streaming also attended something in person

89% chose in-person attendance as their first choice to watch theatre

In

Summary



Filmed theatre helps increase opportunities for both current and new audiences to experience theatre



Filmed theatre, far from reducing engagement with in-person theatre attendance, appears to be increasing opportunities for both current and new audiences to experience theatre. In offering complementary benefits, it is increasing overall engagement and widening the reach of theatre productions, as well as demonstrating new ways in which we might help audiences of the future to experience theatre.



Inter Alia, National Theatre, 2025 © Graham Pearson

© Indigo-Ltd and National Theatre

**National
Theatre
Live**

**National
Theatre
atHome**

indigo