

# National Theatre

**New research finds filmed theatre is growing audiences' overall engagement with theatre**



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New UK-wide research by independent cultural research agency **Indigo**, commissioned by the **National Theatre**, finds filmed theatre is not a substitute for live performance, but an extension of it, helping audiences stay connected to theatre over time, and supporting a more inclusive, UK-wide cultural offer.

The research shows that filmed theatre increases audiences' overall engagement with theatre, with **60%** saying it helps them watch more often than they could in person. It helps to democratise access by widening reach for those who face barriers to attending in person, including disabled audiences: **20%** of those who stream filmed theatre are disabled.

Filmed theatre also supports discovery, with audiences saying digital availability helps them find performances they hadn't previously considered (**60%**). Crucially, this breadth of options doesn't replace the stage: given all the ways to watch theatre, live remains the clear preference (**89%**), reinforcing a **hierarchy of choice** rather than a binary shift away from live theatre.

The five-month study explored the role filmed theatre plays in audiences' lives and its relationship to the wider UK theatre ecology, at a time when audiences have more choice than ever and are re-establishing cultural habits post-pandemic. It combines perspectives from industry leaders with existing audience research, new interviews, and a UK-wide survey

of more than 5,500 respondents drawn from National Theatre audiences, Indigo's nationwide Audience Panel and a partner theatre customer list.

### **Key findings**

- When asked to choose between seeing the same production live, in the cinema or via streaming, **89%** of audiences chose live (rising to **91%** among London audiences).
- Audiences engaging with filmed theatre are also strongly engaged with live theatre: **93%** of cinema/streaming audiences also attend live theatre.
- Without filmed theatre, overall theatre consumption would be lower: **60%** said they consume more theatre overall because filmed options are available.
- Filmed theatre broadens discovery: **60%** said they discovered performances they hadn't previously considered due to digital availability.
- Filmed theatre can support access: a higher proportion of disabled audiences engage – 20% of streaming audiences are disabled compared to 15% of in-person audiences
- Regional reach is significant: the National Theatre's filmed work is overwhelmingly viewed outside London, with **92%** of **NT Live** audiences and **99%** of **NT at Home** audiences based outside the capital.

Across the survey and interviews, audiences consistently described filmed theatre as a way to reduce the risk of trying something new, to watch more theatre than they can manage in person, and to revisit productions they loved. Practical factors, including travel time and cost for audiences outside London and the Southeast, alongside ticket availability and access needs, were recurring barriers to live attendance, with cinema offering a shared, social experience and streaming valued for flexibility and comfort. Read more on the National Theatre website [here](#).

**Matt Risley, Chief Digital Officer at the National Theatre, says:** “Since 2009, the National Theatre has built a digital arm that has helped audiences across the UK - and around the world - experience world-class theatre in cinemas and at home. But growth alone isn't the point: this research gives us robust insight into what audiences actually value, how they choose between live, cinema and streaming, and what gets in the way of attending in person. Filmed theatre should never be framed as replacing the magic of a live performance; it's a complementary offer that can lower barriers, support discovery and keep people connected to theatre over time. Crucially, we commissioned this study to share learning and spark discussion across the sector, so that digital can sit alongside live theatre in ways that strengthen the industry as a whole.”

**Kerry Radden, Associate Director at Indigo, has said:** “Our sector has been worrying about what filmed theatre means since the pandemic threw a spotlight on it. What our research discovered is that filmed theatre has the potential to grow audiences rather than being a threat to the live experience. The vast majority of people watching are also committed, frequent theatregoers. However, audience's experience of filmed theatre frames a shift in power balance – who controls the audience experience and how – which we think asks exciting questions about how theatre engages with audiences into the future.”

## ENDS

### Notes to Editors

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Images [HERE](#).

### **Additional statistics**

- Almost all respondents had attended some sort of in-person theatre performance over the last year: 92% in person, 72% attended a local or regional theatre near them, 60% went to a central London theatre
- While almost two-thirds had watched filmed theatre in the last year: 63% had watched some kind of filmed theatre, 44% had been to see it at the cinema, 39% had streamed it.
- Cinema attenders of filmed theatre are using it to try new things and increase frequency: 47% of London/56% Rest of UK respondents cite discovering new performances not considered before as benefits of watching at the cinema.
- Of those who have watched any filmed theatre in the last 12 months, 93% has also attended live theatre, 76% attended local/regional theatre nearby, 59% attended other central London theatre, 33% attended NT South Bank.
- 87% of cinema attenders of filmed theatre believe 'nothing beats live performance, but cinema is a good second best.'
- 64% of streamers of filmed theatre believe 'nothing beats live performance, but streaming is a good second best.'

### **About the Research**

This research was commissioned by the National Theatre and conducted by Indigo Ltd.

An online audience survey ran for 11 days and gathered 6,222 complete responses, of which 5,556 from UK-based respondents formed the basis of the analysis. Participants were drawn from a convenience sample of National Theatre audiences, Indigo's Audience Panel of cultural attenders, and a smaller sample from theatre owners and wider public outreach. Respondents included people who attend theatre in person, watch productions in the cinema, and stream online, as well as those who engage across all three channels.

In addition, 44 in-depth interviews were carried out online, comprising 14 interviews with industry professionals and 30 with audience members. The research also included analysis of NT sales data and previous audience surveys.

### **About the National Theatre**

The National Theatre offers the widest access to high-quality theatre in the world. This year, we will produce 18 plays, following over a thousand shows that have shaped British theatre since 1963.

Our productions transfer from our home in London to the West End, Broadway and beyond, winning awards on both sides of the Atlantic. We champion bold storytelling that inspires, challenges and entertains, bringing the world to the National Theatre, and taking the best of

British theatre to the world. Through our online streaming service NT at Home; our education platform, the NT Collection in schools; and in cinemas with NT Live, we reach audiences digitally in almost every country worldwide - 184 out of 195 and counting.

We operate as a registered charity with a deep social purpose and a nationwide footprint. We partner with regional theatres to tour our shows, are active in more than 90% of state secondary schools, and our Skills Centre trains 5,000 people each year.

Our dedicated NT Studio champions new writing, and we are central London's 'biggest factory' with workshops that craft every aspect of our productions. We host the world's most extensive theatre archive, and our Green Store houses more than 150,000 reusable props and costumes as part of our sustainability commitments.

For more information, please visit [nationaltheatre.org.uk](https://nationaltheatre.org.uk)

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About Indigo

### **About Indigo Ltd**

Indigo Ltd is a specialist audience insight and strategy consultancy helping arts, culture and heritage organisations to grow and thrive. Through rigorous audience insight combined with deep sector knowledge, Indigo equips organisations to bring the audience voice into their decision-making. Indigo works with museums, galleries, theatres and heritage organisations at every stage of development, from early concept testing to long-term audience development planning. Alongside these projects, Indigo delivers the award-winning Indigo Share, offering benchmarked post-visit surveys and collaborative cross-sector projects.

For more information visit [indigo-ltd.com](https://indigo-ltd.com) or contact [info@indigo-ltd.com](mailto:info@indigo-ltd.com).