



# AI AND WORK

**IN THE MEDIA, ARTS & ENTERTAINMENT SECTOR**

PART 1/4  
**2026 SECTOR REPORT**



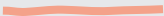
Study and survey by TWIID & Doenker - Commissioned by FIA, EFJ, FIM & UNI Europa



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# PREFACE



Artificial intelligence is no longer a distant prospect for the media, arts and entertainment sector. It is already here — embedded in production workflows, reshaping creative processes, and raising urgent questions about jobs, rights, and the future of creative work.

Yet until now, much of the debate has relied on general narratives rather than sector-specific evidence. What do actors, crew, musicians and journalists actually experience? What do their unions observe? And where do the two perspectives converge or diverge?

This report is one of four sector reports that together form a comprehensive study on AI and work in the media, arts and entertainment sector. Commissioned by FIA, EFJ, FIM and UNI Europa, and carried out by TWIID and Doenker, the study set out to close a critical knowledge gap: how is AI, and generative AI in particular, affecting employment, working conditions and intellectual property rights across the European audiovisual and related media sectors?

**The four sector reports each focus on one federation and the professionals it represents:**

**FIA:** actors (including actors, voice artists, dancers and related professions)

**FIM:** musicians

**UNI MEI:** crew and animation workers in the audiovisual sector

**EFJ:** journalists and other media professionals

As outlined above, for the purposes of this report, the cohort of members of FIA and its affiliates are referred to as “actors”, however, many FIA unions also organise dancers and other performers, whose reflections are also included where they were received.

Each report presents sector-specific survey results, comparing the perspectives of unions and their members on AI awareness, perceived impact, concerns, and support needs. A cross-sector comparison concludes each report, allowing the reader to situate the sector findings within the broader landscape.

The research was conducted in two phases. A structured desktop study, carried out between September 2024 and early 2025, mapped out AI tools, use cases and emerging labour responses across sectors. This informed a two-track survey programme, fielded between September and December 2025, which captured not only both organisational perspectives from 25 unions across 18 countries but also and the lived experiences of professionals through five sector-specific questionnaires distributed in multiple languages.

Several patterns emerged clearly across all four reports. Concern about AI’s impact is near-universal: fewer than 6% of respondents across all sectors and groups say they are “not at all concerned.” At the same time, awareness and familiarity vary widely from journalists, many of whom already use AI tools daily, to actors and crew, where a majority is still only slightly familiar with AI in their work environment. A structural gap between unions and members runs through the entire study: unions consistently report higher awareness, AI and work in the in Media, Arts & Entertainment sector - part 1 of 4 sector report FIA 2 anticipate greater disruption, and articulate more comprehensive governance needs, while individual workers express more immediate, personal concerns about job loss, rights, and creative autonomy.

These reports do not claim to provide a final or exhaustive account. AI is developing rapidly, and the perceptions captured here reflect a specific moment at the end of 2025. What we hope they do provide is a robust, evidence-based foundation, grounded in the voices of workers and their representative organisations, for the collective bargaining strategies, policy responses and social dialogue that the sector urgently needs.

We would like to thank the four federations and their affiliated unions for their commitment to this project, and above all the hundreds of professionals who took the time to share their experiences, concerns and hopes. This research exists because of them, and it is to them the people who provide the work that it is ultimately addressed.



TWIIID & Doenker · March 2026

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#### DISCLAIMER: TIMING AND LIMITATIONS OF THE EVIDENCE BASE

The evidence base presented in this report brings together a desktop research phase conducted between September 2024 and early 2025 and survey data collected between September and December 2025. In a field where AI tools, business practices and regulatory debates in the media and cultural sectors are evolving very rapidly, some of the concrete tool examples, company strategies and policy discussions described here may already have changed by the time of publication. Likewise, workers' and unions' perceptions captured in the surveys reflect a specific moment at the end of 2025, and their views, strategies and concerns may since have further developed as new cases and conflicts emerged. What remains robust, however, are the broader patterns we identify in how AI affects intellectual property, job content, skills and working conditions. Readers should therefore treat the concrete tools, cases and survey snapshots as time-bound illustrations rather than exhaustive or fully up-to-date inventories and interpret the findings with awareness of the highly dynamic nature of AI development and labour responses in the creative industries.

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# **RESEARCH PROCESS**

## ASSIGNMENT

This study examines the impact of artificial intelligence (in particular generative AI) on jobs, working conditions and intellectual property rights in the European audiovisual and related media sectors. It combines a sectoral trade union survey on member experiences, priorities, advocacy campaigns and collective bargaining provisions related to AI with a broader scoping of key challenges: generative AI and IP rights protection, generative AI and its impact on jobs and work, and AI-related skills needs in the sector. Commissioned by and carried out in close cooperation with the project partners, the research aims to close the current knowledge gap and provide a comprehensive basis for European-level social dialogue, including specific policy recommendations and collective bargaining insights.

## DESKTOP RESEARCH

The study began with a structured desktop research phase to establish an evidence base on how AI is being developed and deployed across the media and cultural sectors covered by this project (audiovisual actors and crew, animation, music, and journalism). This phase had two main purposes. First, it provided a shared conceptual understanding of AI systems and their relevance to sector-specific workflows. Second, it generated empirically grounded insights on tools, use cases, risks and emerging labour responses that were directly used to design the survey questionnaires and to interpret the results. Rather than treating AI as a generic or abstract development, the desktop research aimed to clarify what types of AI are present, how they function, and why they matter for employment, skills, working conditions, and rights.

The desktop research was conducted as a targeted review of publicly available sources and sector documentation. It combined technical orientation (understanding how systems operate and what distinguishes them) with socio-economic and legal orientation (understanding what these systems mean for creative labour and labour relations). The research was organised sector-by-sector, while also tracking cross-cutting AI developments that affect multiple sectors (such as generative AI for text, image, video, and audio; voice cloning and digital replicas and workflow automation tools embedded in professional software environments).

## TWO TRACK SURVEYS

(unions, their federations and members)

### ●● Research Objectives

The study pursues five objectives: (1) mapping out current AI use and awareness within each sector; (2) identifying how stakeholders perceive opportunities and threats linked to AI; (3) assessing expected and emerging impacts on employment, skills and working conditions; (4) documenting what unions and member organizations are already doing and what needs they identify; and (5) collecting inputs that can support negotiations and policy responses.

### ●● Research design

The methodology combines a preparatory desktop/literature study with a sector-based survey programme.

The desk study established the analytical baseline for the surveys. It reviewed key types of AI, their capabilities and typical modes of operation, and the AI tools used across the sectors under study. Particular attention was paid to the role of data and the extent to which AI systems operate transparently. The desk study also examined how sectors have responded to AI developments and drew lessons from recent disputes and protests. Insights from this phase were used to formulate survey questions that reflect sector realities and current tool use.

Based on this foundation, a two-track survey approach was implemented to capture both organisational and professional perspectives.

## ●● Survey approach: two-track model

Firstly, surveys of unions and member organisations (affiliated to the relevant federations) were carried out, focusing on organisational awareness, observed challenges, actions taken, and support needs.

Secondly, surveys of professionals (union members/sector workers) were carried out, focusing on lived experience in the workplace, AI familiarity, perceptions of risks and opportunities, and perceived impacts on work.

For the professional track, five sector-specific questionnaires were developed: actors, crew, animation, music and journalism. This sector-based structure reflects the fact that AI applications, production pipelines, and employment relations differ significantly across these domains.

## ●● Survey content

Across both tracks, the questionnaires covered five core themes: (1) respondent characteristics (demographics and professional profile for workers; organisational profile for unions); (2) familiarity with AI and perceived prevalence of AI use in the sector; (3) perceptions of opportunities, threats and risks, including potential job impacts; (4) actions and developments, including notable cases and initiatives; and (5) needs for support, including practical resources such as guidelines, tools and model agreements.

Some questions (especially those addressing concerns and sector developments) were adapted to the specific context of each sector. They were based on the desktop research about the specific tools for each sector. This increased relevance for respondents but means that not all concern-related items can be compared directly across sectors.

## ●● Distribution and fieldwork

Survey dissemination also followed the two-track structure and was implemented through union networks. The study worked through four federations: FIA, FIM, UNI MEI and EFJ. Each sector was represented within this framework, with unions selected to reach member in the relevant professional domains. For the professional surveys, separate language versions were created for each country in which unions distributed the questionnaires, to support accessibility and maximise participation.

The surveys were launched on 12 September 2025 and closed on 19 December 2025.

## ●● Participation

In the union track, 87 unions from 31 countries completed the survey. The professional track yielded sector-specific respondent groups (reported in the results chapter), allowing for both within-sector analysis and cautious cross-sector comparison where equivalent questions were used.

## ●● Analytical considerations

The methodology supports a detailed descriptive mapping of AI awareness, perceptions and needs. Interpretation should, however, take into account three points. Firstly, sector-tailored questions limit comparability for certain concern-related items. Secondly, distribution through union channels may shape the respondent pool relative to the wider workforce. Thirdly, where sector samples are smaller, percentages can be more sensitive to small changes; counts should therefore be considered alongside percentages.

Overall, the research design combines a contextual desk study with a structured, sector-based survey programme that captures both organisational and worker perspectives, with the explicit aim of informing collective bargaining and policy responses.



**ACTORS**

# ANALYSIS OF 490 ACTORS AND VOICE ARTISTS FROM GERMANY AND SWEDEN

**Respondents:** 490 actor members of German Actors' Union BFFS - Die Schauspielgewerkschaft and Swedish Union for Performing Arts & Film Scen & Film

BFFS

Scen & Film

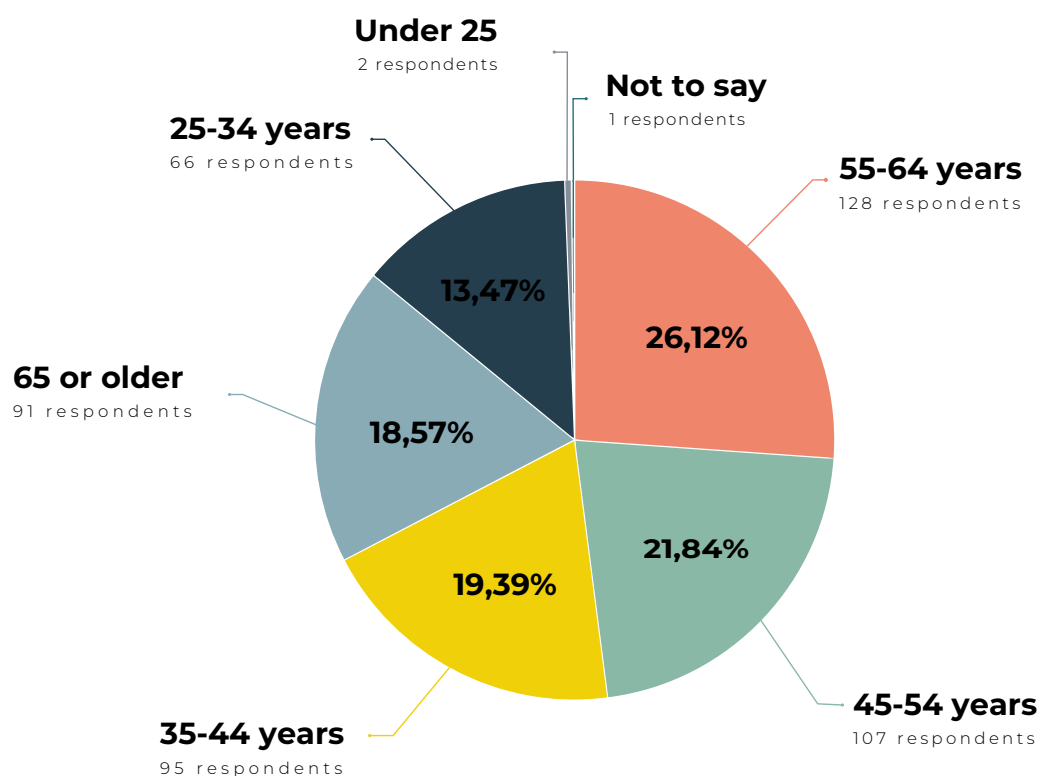
**Geographical Focus:** Germany and Sweden (primarily German)

**Note on terminology:** for the purposes of this report, the cohort of members of FIA and its affiliates are referred to as "actors", however, as detailed below, many FIA unions also organise dancers and other performers, whose reflections are also included.

## PROFILE

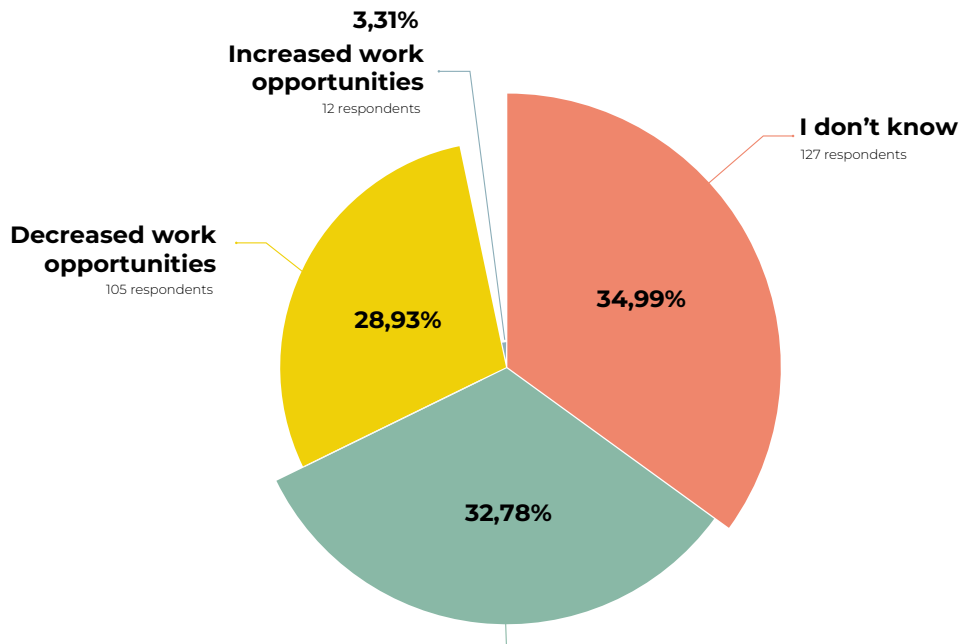
### Age

Out of 490 actor respondents, the largest age group is 55–64 (128; 26.12%). The sample then steps down across adjacent cohorts: 45–54 accounts for 21.84% (107) and 35–44 for 19.39% (95), while 65 or older remains substantial at 18.57% (91). Younger actors are less represented, with 25–34 at 13.47% (66) and under 25 at 0.41% (2), while 0.20% (1) preferred not to disclose. Overall, the actor profile skews older: 45+ represents 66.53% of respondents (326 people), and those aged 35–64 make up 67.35% (330), indicating that responses in this group largely reflect mid-to-late career perspectives.



## ●● Profession

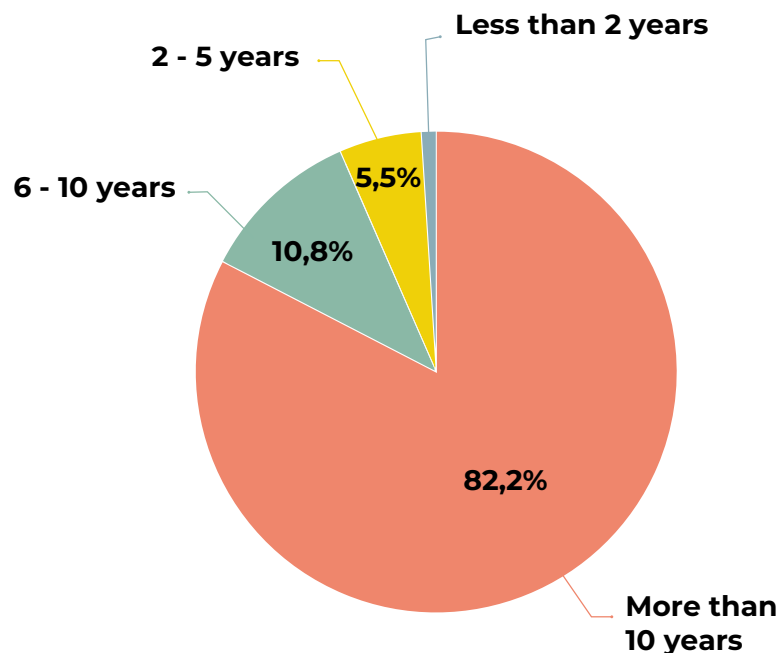
As profession, respondents could select “actor”, “voice artist”, “dancer” or add another profile. Many selected different professions. Of the 490 respondents almost 400 selected “actor” as one of their professions.



Among the “other” professions were jobs ranging from hospital clown or magician to directors, choreographer, trainers, singer and circus artist.

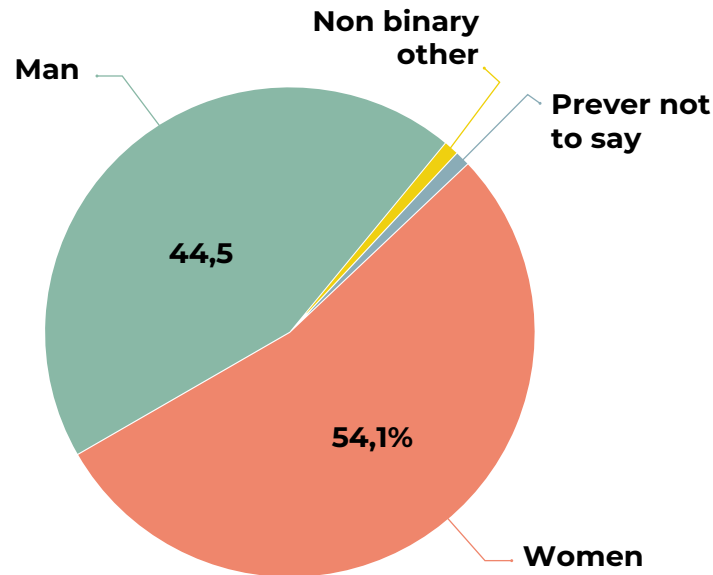
## ●● How many years of experience do you have in your profession?

Out of 490 actor respondents, an overwhelming majority report more than 10 years of professional experience (403; 82.24%). Much smaller shares fall into the mid-range brackets, with 6–10 years at 53 respondents (10.82%) and 2–5 years at 27 (5.51%). Only 7 actors report less than 2 years of experience (1.43%). Overall, the actor subgroup is clearly dominated by long-established professionals: those with 6+ years of experience make up 93.06% (456 people), while those with 5 years or less represent just 6.94% (34 people).



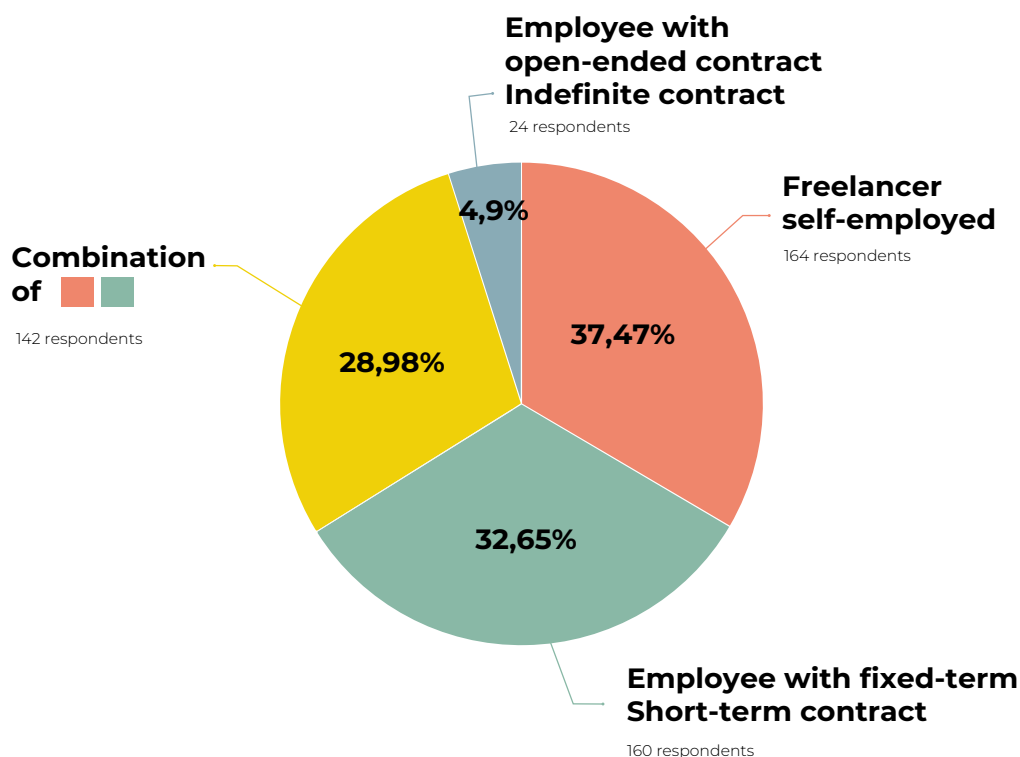
## ●● Gender

Out of 490 actor respondents, women form the largest group with 265 respondents (54.08%), followed by men at 218 (44.49%). Very small shares identify as non-binary (4; 0.82%) or prefer not to say (3; 0.61%). Overall, actors in this sample are predominantly binary-identified (women + men), representing 98.57% of respondents (483 people), with 1.43% (7 people) identifying as non-binary or not disclosing their gender.



## ●● What are your usual work arrangements?

Out of 490 actor respondents, the most common work arrangement is freelancer / self-employed (164; 33.47%), closely followed by employee with a fixed-term / short-term contract (160; 32.65%). A further 142 actors report a combination of employment and freelance work (28.98%), underscoring how common mixed or portfolio careers are in this group. Only 24 respondents report being an employee with an open-ended / indefinite contract (4.90%). Taken together, 95.10% of actors (466 people) work in non-indefinite arrangements (freelance, fixed-term, or combined), highlighting a sector profile dominated by flexible and often project-based employment rather than stable permanent contracts.



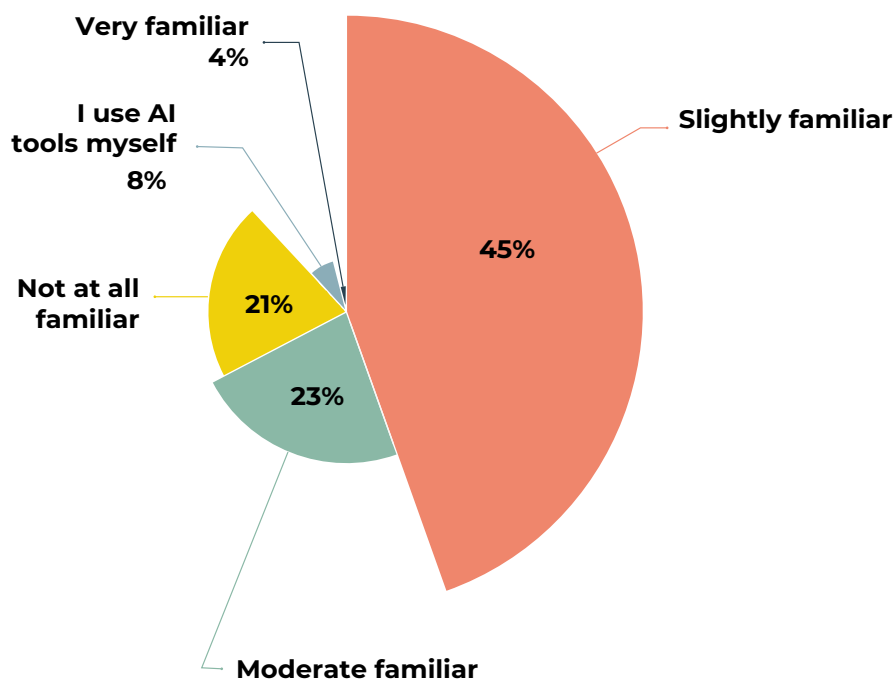
In the open answers some mentioned very specific work arrangements like “Teateralliansen” (theatre alliance) or being employed under “tax card” Schauspieler auf Steuerkarte. Some also said they were retired - “Pensionär”.

## AI IN GENERAL

### ●● How familiar are you with the use of AI in your work environment?

Out of 417 actor respondents who answered this question, familiarity with AI in the work environment is mostly limited to low or moderate levels. The largest group reports being slightly familiar (45%), followed by moderately familiar (23%) and not at all familiar (21%). Taken together, these three categories account for 88% of responses, indicating that nearly nine in ten actors are not yet strongly engaged with AI at work.

More advanced engagement remains a minority: 32 actors say they use AI tools themselves (8%) and 16 report being very familiar (4%). Combined, only 12% indicate direct use or high familiarity, suggesting that while awareness exists, hands-on adoption is still relatively limited among actors in this sample.



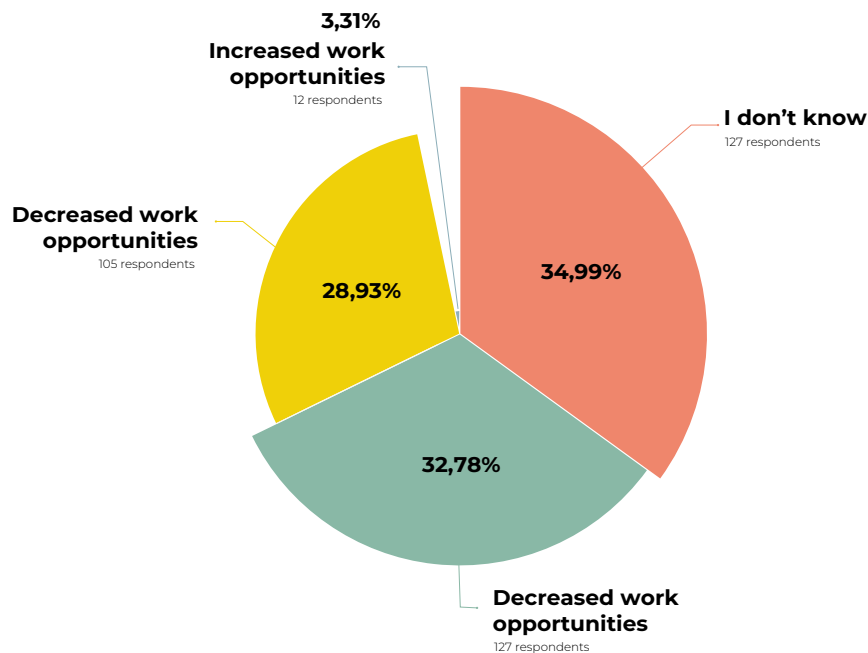
If we zoom in on the data and compare male respondents with female respondents, we see a large difference. Where 11.3% of the male respondents say they use AI themselves, only 4.9% of the female respondents say the same. Male respondents are also more “moderately familiar” (28.0% vs 18.8%).

### ●● Has AI affected your work opportunities?

Out of 363 actor respondents who answered this question, the most common response is “I don't know” (127; 34.99%), highlighting substantial uncertainty about AI's impact on actors' opportunities. Close behind, 119 respondents report decreased work opportunities (32.78%), while 105 report no significant change (28.93%). Only 12 actors say AI has increased their work opportunities (3.31%).

Overall, about one-third of actors perceive a clear negative impact, while positive impacts remain rare. We see reported decreases outnumbering increases by roughly 10 to 1. Grouping responses, 36.09% (131 people) report a direct change (increase or decrease), and this is overwhelmingly tilted toward decline, whereas 63.91% (232 people) either see no change or are unsure.

These perceived changes are not the same in all groups. If we compare the different age groups we see that of the 25-34 year olds and the 45-54 year olds about 40% declare decreased work opportunities. In the group of 65+ only 25% sees this decrease. There are also country-level differences within the dataset that are not explored in the report. Among respondents completing the survey in German (N=304), 33.2% reported decreased work opportunities, compared to 28.6% among Swedish-speaking respondents (N=185). Moreover, Swedish respondents were more likely to indicate “no significant change” in their work situation (60 vs. 45 among German-language respondents). This suggests that Swedish-speaking professionals appear somewhat less affected by decreasing work opportunities than their German-speaking counterparts.



The remarks on this question paint a very consistent picture: when actors talk about “opportunities”, most of them are really talking about work volume and income security, and the clearest impact is concentrated in voice-related markets (voice-over, dubbing/ADR, audiobooks, advertising, explainer videos). Many describe sharp declines in demand, sometimes in dramatic terms: *“My speaking engagements (mainly for advertising) have decreased by 80% to 90%”, “Synchronization decreased significantly,”* and *“Dubbing jobs have practically disappeared.”*

Several link this directly to AI substitution: *“Fewer voice actors are being booked because generative AI is being used for voiceovers and scripts”* and *“Voiceover jobs are disappearing thanks to AI-generated voices. Quickly and cheaply.”* The same theme appears in concrete examples of replacement: *“Voice-over in documentaries has already been partially replaced by AI-generated voices”* and *“Non-fiction books are already being produced with AI voices”* Even where respondents are not sure AI is the sole driver, the perceived direction is similar: *“Currently, there are fewer orders in the dubbing industry, but I don't know why”* or simply *“Significantly fewer jobs”*

A second major cluster possibly explains why *“I don't know”* is so common: respondents repeatedly highlight opacity. They cannot see where AI is used, whether rejections are AI-mediated, or whether their voice is being reused. This comes through in comments like *“Due to the lack of transparency, it is not possible to know where, what, and how it is used”, “No one has told us if they have used it”* and *“I don't know what jobs I won't get because an AI can do it”*. But several remarks show that uncertainty is not neutral; it is accompanied by fear about unseen substitution: *“I don't know if I was rejected in some AI-generated casting...”* and *“It is still unclear to me personally whether and how my voice will be used.”*

A third cluster frames opportunity loss as tied to consent, contracts, and refusal to train AI. Some respondents describe being harmed either because AI replaces them, or because they resist AI clauses and become less “hireable”: *“I'm losing jobs because either AI takes over, or I refuse to let the AI train with my data, so that I*

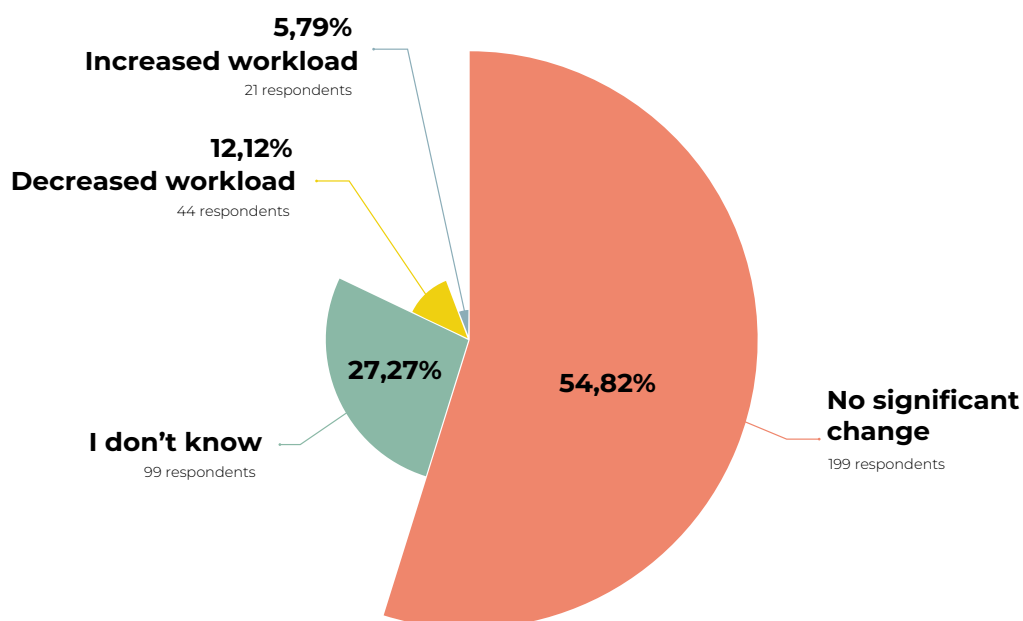
*eventually become redundant.*” Others describe real incidents of misuse that directly alter their willingness to work: *“my voice was... requested... and then, without compensation, it was edited/cloned using AI... I’m considering whether I should even lend my voice to any further work.”* Several point to deteriorating terms and the need to renegotiate protection constantly: *“I constantly have to amend contracts because they lack an AI clause to protect the actor’s face and voice!!!”* and *“I cancelled two computer game productions... because the terms and conditions regarding AI usage were extremely vague.”* In these remarks, the “opportunity” question becomes a governance question: opportunity depends not only on market demand, but on whether actors can protect rights and avoid being turned into training material.

Positive opportunity remarks exist, but they are rare and usually indirect. AI is more often described as helping with support work than generating more acting jobs. A few respondents mention efficiency gains: *“When I’m writing, AI helps me with my research. It’s much faster”* or *“it shortens the time for preparation... and is also a useful tool as a first sparring partner.”* Others describe promotional benefits rather than casting benefits: *“I do use AI... for promotional material... This allows me to get started faster”* and *“soon there will be an option to have my videos translated into all languages... That’s fantastic and gives me the opportunity to reach a global audience”*. There are also a few ambivalent “new category” opportunities, such as being hired as training data: *“I was recently booked not as an actress, but as an AI model... the fee was... less”* which reads less like an opportunity and more like a reshaping (and potentially cheapening) of work. Overall, the remarks strongly reinforce the quantitative pattern: actors overwhelmingly describe opportunity change as decline (especially in voice markets) while “upsides” are mostly confined to adjacent productivity and reach, not increased actor employment.

## ●● Has AI affected your workload?

Out of 363 actor respondents who answered this question, most report no significant change in workload (199; 54.82%). A further 99 selected “I don’t know” (27.27%), indicating that for over a quarter of actors the workload impact of AI remains unclear. Direct workload changes are reported by a smaller minority: 44 respondents say AI has decreased their workload (12.12%), while 21 report an increased workload (5.79%).

Overall, 17.91% of actors (65 people) perceive a clear workload shift, and when change is reported it is more often a decrease than an increase (roughly 2:1), while 82.09% (298 people) either experience stability or uncertainty about AI’s effect on workload.



The remarks that were given are less about *“AI makes my job easier”* and more about how pressure, pace, and insecurity shape the working day. A sizeable group confirms *“no change”* or uncertainty simply because they don’t use AI or haven’t seen it in projects: *“AI has not been used in my professional work so far”*, *“Not at the moment!”*, and *“I don’t work with these tools”*. Some stage-focused actors echo that they’ve *“not noticed [AI] at the theatre where I work”*, which helps explain why workload effects feel unclear for a large share.

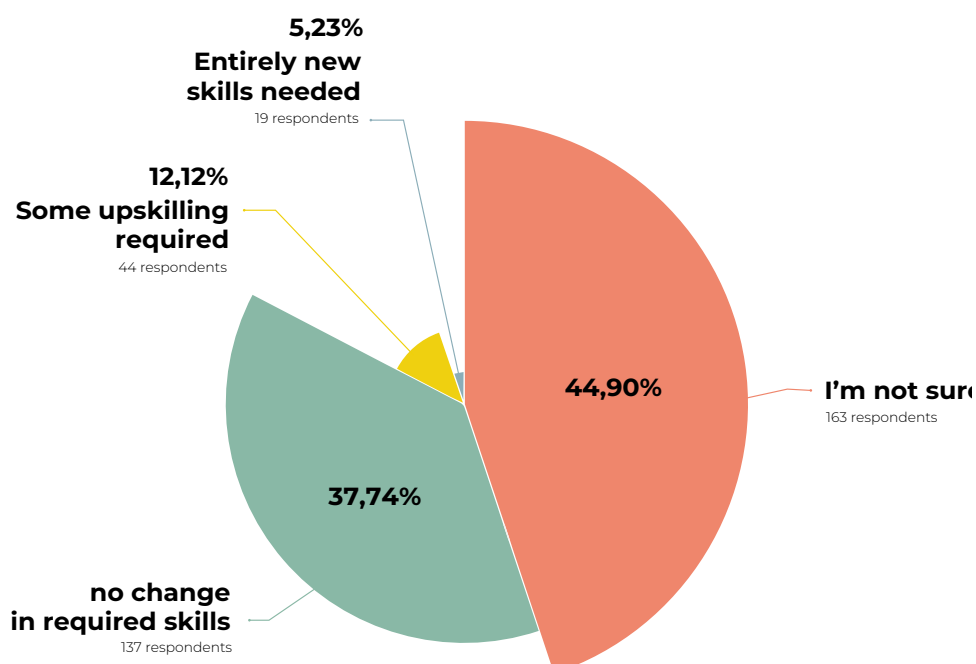
Where AI is described as reducing workload, it’s mostly in support tasks like research, drafting, and admin. Respondents cite *“Correspondence / emails and research facilitated”*, *“Researching and cross-checking has become easier”*, and very concrete time savings: *“Jobs that used to take 10 hours now take ten minutes”*. Others describe AI as useful for summaries, brainstorming, or technical help: *“Easier to brainstorm ideas with chat gpt”*, or *“You can get quick answers to work-related questions”*. Nevertheless they stress that it requires checking: *“Research is faster, but the error rate is also higher... You always have to check AI afterwards!”*

However, the most striking cluster is workload increasing through accelerated expectations, extra checking and emotional strain rather than more artistic work. One comment captures the faster-but-heavier dynamic: *“Everything is faster... but... doubles, not triples... the amount of work we do each day... Humanity is left behind!”* Others describe *“more bureaucracy and overreliance on technology”*, or that clients demand immature tools: *“Clients expect that their preferred AI tools will be used... but these tools are not mature.”* Several also link workload to the shrinking market: *“More auditions with fewer chances of success”*, *“I need to do more to get a job, as many have disappeared”*, and *“Less work, more psychological stress in the form of existential anxiety.”* In short, the remarks suggest that when actors report workload change, it often reflects either (a) efficiency gains in peripheral tasks, or (b) intensified time pressure and insecurity—where the “work” is chasing fewer opportunities and coping with the fear of being replaced, not the acting craft itself.

## ●● How has AI changed the skills needed in your job?

Out of 363 actor respondents who answered this question, uncertainty is the dominant theme: 163 say *“I’m not sure”* (44.90%). A further 137 report no change in required skills (37.74%), suggesting that many actors either have not yet encountered clear skill shifts or do not associate them directly with AI. Still, a meaningful minority already perceive skills impacts: 44 respondents report some upskilling is required (12.12%), and 19 say entirely new skills are needed (5.23%).

Taken together, those who see any skills change (upskilling or new skills) account for 17.36% of actors (63 people), while 82.64% (300 people) either see no change or remain uncertain. This indicates that, for most actors in this sample, the skills implications of AI are not yet clearly defined or felt.



The remarks on this question make clear that many actors don't experience "skill change" as learning to act differently, but as coping with uncertainty and low visibility. A large share of comments echo the **"I'm not sure"** response by stressing limited contact with AI or limited insight into production processes: **"I have not yet encountered AI in any specific project"**, **"not yet enough points of contact or experience"**, and **"I don't have enough insight into the processes behind the camera."** Live theatre respondents often frame their work as insulated from AI. **"My theatre is completely analogue"** and **"The USP of theatre is 'here and now'";** which helps explain why skills impacts remain diffuse for many even while the topic feels looming.

Where respondents do describe new skills, the dominant theme is legal/contractual literacy and rights protection, especially around voice and likeness. Multiple actors describe becoming "contract vigilant": **"I am very careful to explicitly state in all contracts that no AI may be used... for my voice"**, and **"Suddenly, it feels like you need legal assistance every time you are presented with a contract... that contains strange AI regulations."** This is tightly linked to transparency fears: **"we often only realize our performances have been processed by AI when it's too late"** and **"If my voice is used, I won't know unless someone recognizes it"**. So "skill change" is often framed as learning to detect risk, negotiate consent, and safeguard attribution (legal knowledge).

A third strong impression is the split between skills unchanged and work disappearing, especially in voice work. Several say plainly, **"AI hasn't changed my skills as an actor"**, but immediately add labour-market impact: **"it has taken jobs away from me as a voice actor"**, **"In my book reading industry, this has meant fewer jobs"**, and **"The number of voice over-jobs has decreased for me."** For some, this pushes forced adaptation: **"I was forced to learn how to use AI tools... to build a second source of income"**, while others reject the premise outright: **"I avoid AI. I see nothing good in it."** Overall, the remarks suggest actors currently read AI-driven "skill change" less as a craft shift and more as a mix of (1) limited exposure, (2) heightened need for legal and technical vigilance, and (3) economic pressure that may require diversification even if acting skills stay the same.

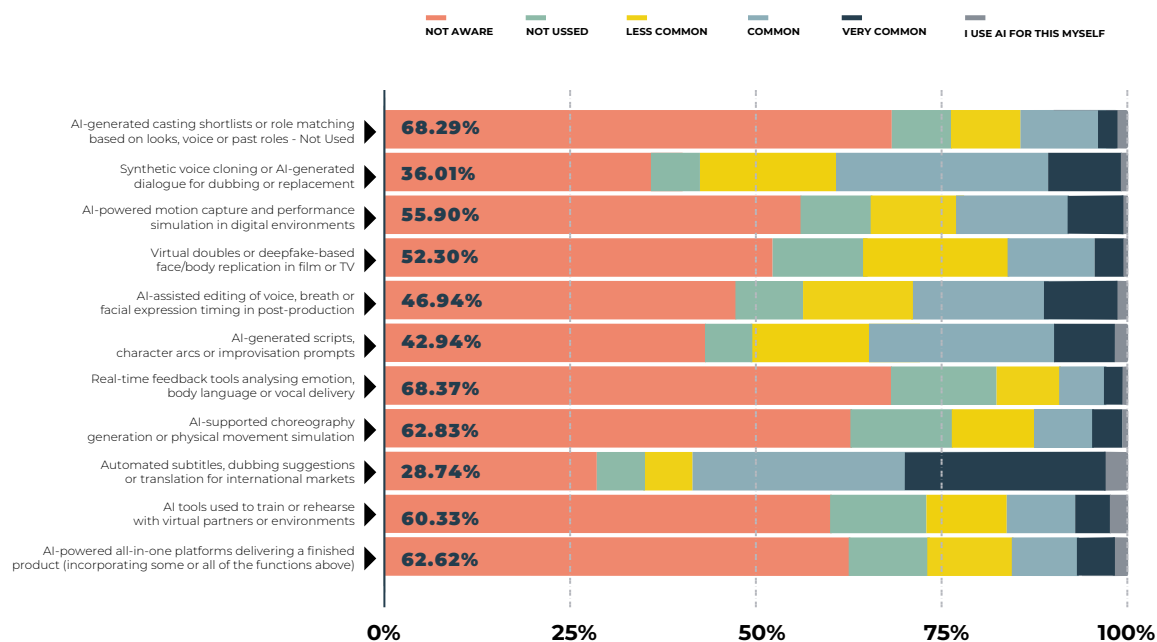
## AI Awareness:

Among actors, most listed AI applications are only partially known and used. On average, 53% of respondents say they are not aware of a given application and 10% say it is not used, while 23% describe it as common or very common. On average just over 1% report that they use these AI tools for themselves.

Non-awareness is highest for AI-generated casting shortlists (68.3%) and real-time feedback tools analysing emotion/body language/vocal delivery (68.4%), and lowest for automated subtitles/dubbing/translation (28.7%). For most applications, not used lies between about 10% with the highest values for real-time feedback tools (14.3%) and AI-supported choreography/movement simulation (13.7%), and the lowest for subtitles/dubbing/translation (6.2%).

Combined common and very common use exceeds 30% only for three items. Synthetic voice cloning/AI dialogue for dubbing or replacement has 37.8% common/very common, AI-generated scripts/character arcs/improvisation prompts has 33.5%, and automated subtitles/dubbing/translation has 56.7% (29.8% common and 26.9% very common).

Direct personal use is low across all items. The highest self-use is reported for automated subtitles/dubbing/translation (2.9%) and AI tools used to train or rehearse with virtual partners or environments (1.9%) while most other applications have self-use at or below 1.7%, with AI-powered motion capture at 0.2%.



When we look at the gap for each AI- tool between being reported as being used (“very common” + “common” + “I use AI for this myself”) versus “not aware” we get an idea of how wide spread awareness of certain tools is in the sector.

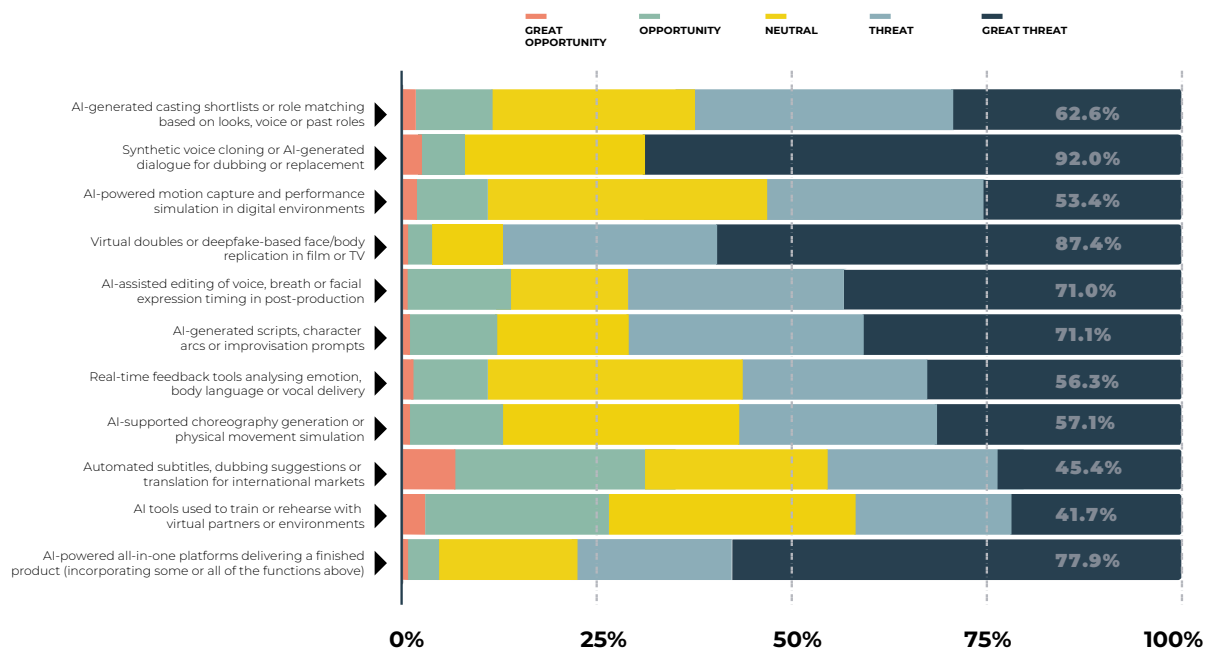
|                                                                                                                  | USE    | NOT AWARE |
|------------------------------------------------------------------------------------------------------------------|--------|-----------|
| AI-generated casting shortlists or role matching based on looks, voice or past roles - Not Used                  | 13.66% | 68.29%    |
| Synthetic voice cloning or AI-generated dialogue for dubbing or replacement                                      | 38.44% | 36.01%    |
| AI-powered motion capture and performance simulation in digital environments                                     | 23.37% | 55.90%    |
| Virtual doubles or deepfake-based face/body replication in film or TV                                            | 15.74% | 52.30%    |
| AI-assisted editing of voice, breath or facial expression timing in post-production                              | 28.85% | 46.94%    |
| AI-generated scripts, character arcs or improvisation prompts                                                    | 34.99% | 42.93%    |
| Real-time feedback tools analysing emotion, body language or vocal delivery                                      | 8.76%  | 68.37%    |
| AI-supported choreography generation or physical movement simulation                                             | 11.99% | 62.83%    |
| Automated subtitles, dubbing suggestions or translation for international markets                                | 58.91% | 28.74%    |
| AI tools used to train or rehearse with virtual partners or environments                                         | 15.91% | 60.33%    |
| AI-powered all-in-one platforms delivering a finished product (incorporating some or all of the functions above) | 15.24% | 62.62%    |

Actors show a more “two-speed” awareness profile than for instance crew. Subtitles/dubbing/translation is the standout with 58.9% use and the lowest “not aware” (28.7%), which strongly suggests actors most consistently encounter AI where it affects distribution and accessibility.

A second “visible tier” comes from high-profile generative topics: voice cloning (38.4% use) and AI script/character prompts (35% use). These are the kinds of applications people talk about publicly, and they have obvious implications for actors’ craft and labour, so it makes sense they are more recognised than specialised pipeline tools.

The largest blind spots sit exactly where you might expect actors to be most sensitive: casting/role matching and real-time performance feedback both have +/-68% not aware and the lowest use. This gap matters because it implies that tools that could directly influence opportunity, selection or evaluation are either not widespread, not visible, or not understood as AI by respondents.

## Threat Perception



The above graphic shows the distribution of Likert-scale scores from “great opportunity” to “great threat”. In the table below, we distinguish between opportunity (= great opportunity + opportunity), neutral, and threat (= threat + great threat).

|                                                                                                 | THREAT | NEUTRAL | OPPORTUNITY |
|-------------------------------------------------------------------------------------------------|--------|---------|-------------|
| AI-generated casting shortlists or role matching based on looks, voice or past roles - Not Used | 62.6%  | 25.7%   | 11.7%       |
| Synthetic voice cloning or AI-generated dialogue for dubbing or replacement                     | 92.0%  | 5.2%    | 2.7%        |
| AI-powered motion capture and performance simulation in digital environments                    | 53.4%  | 35.5%   | 11.1%       |
| Virtual doubles or deepfake-based face/body replication in film or TV                           | 87.4%  | 8.7%    | 3.8%        |

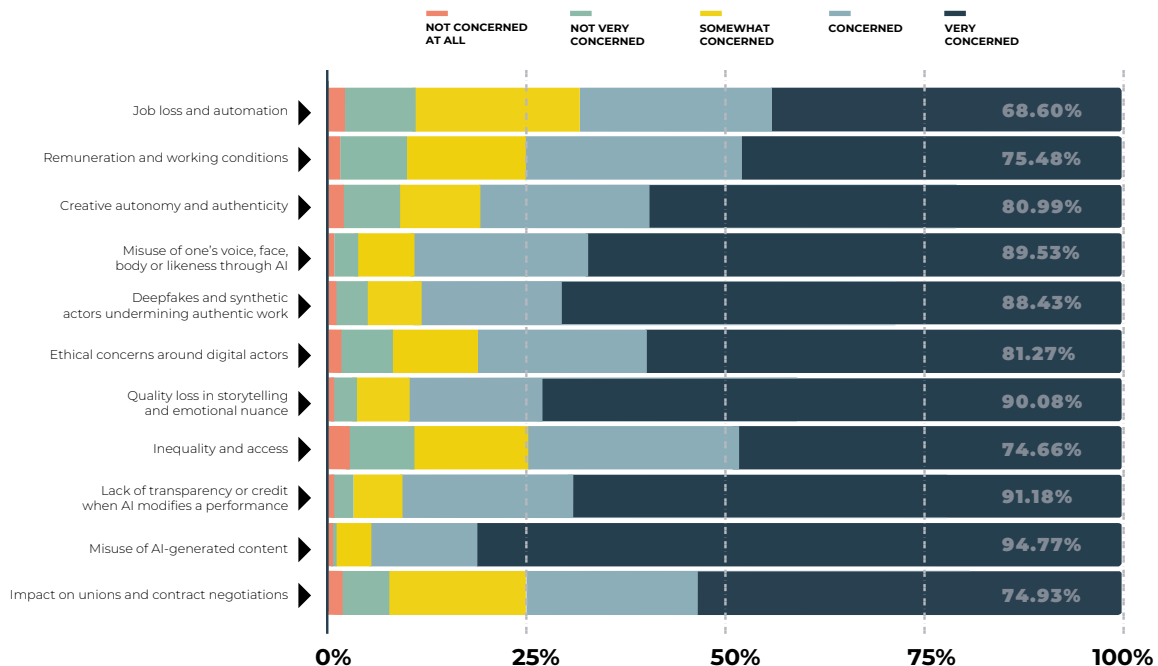
|                                                                                                                  |       |       |       |
|------------------------------------------------------------------------------------------------------------------|-------|-------|-------|
| AI-assisted editing of voice, breath or facial expression timing in post-production                              | 71.0% | 16.9% | 12.0% |
| AI-generated scripts, character arcs or improvisation prompts                                                    | 71.1% | 16.9% | 12.0% |
| Real-time feedback tools analysing emotion, body language or vocal delivery                                      | 56.3% | 32.3% | 11.4% |
| AI-supported choreography generation or physical movement simulation                                             | 57.1% | 30.1% | 12.8% |
| Automated subtitles, dubbing suggestions or translation for international markets                                | 45.4% | 23.5% | 31.2% |
| AI tools used to train or rehearse with virtual partners or environments                                         | 41.7% | 31.6% | 26.7% |
| AI-powered all-in-one platforms delivering a finished product (incorporating some or all of the functions above) | 77.9% | 17.2% | 4.9%  |

Actors are strongly threat-oriented across most applications, but the pattern is not uniform. The most extreme threat perceptions attach to identity-replication technologies: voice cloning is overwhelmingly seen as threatening (92.0% threat), and deepfake-style virtual doubles are nearly as high (87.4%). These two items sit in a category of their own and shape the overall tone of actors' perception data.

A second cluster is made of applications that still feel threatening but less absolute: AI-assisted editing and AI-generated scripts both land at roughly the same level (about 71% threat), suggesting that actors also perceive risk in tools that affect performance content, delivery, or the creative pipeline, though not quite as intensely as likeness/voice replication.

The items where perceived opportunity becomes more visible are those that read as "assistive infrastructure" rather than replacement. Subtitles/translation has the highest opportunity share in actors (31.2%) and a lower threat share than most other actor items (45.4%), while rehearsal tools also show a relatively meaningful opportunity share (26.7%). In short, actors distinguish sharply between AI that can replicate/replace an actor and AI that supports distribution or practice.

## Concerns



|                                                               | CONCERNED | NEUTRAL | NOT CONCERNED |
|---------------------------------------------------------------|-----------|---------|---------------|
| Job loss and automation                                       | 68.60%    | 20.39%  | 11.02%        |
| Remuneration and working conditions                           | 75.48%    | 14.60%  | 9.92%         |
| Creative autonomy and authenticity                            | 80.99%    | 9.92%   | 9.09%         |
| Misuse of one's voice, face, body or likeness through AI      | 89.53%    | 6.61%   | 3.86%         |
| Deepfakes and synthetic actors undermining authentic work     | 88.43%    | 6.61%   | 4.96%         |
| Ethical concerns around digital actors                        | 81.27%    | 10.47%  | 8.26%         |
| Quality loss in storytelling and emotional nuance             | 90.08%    | 6.34%   | 3.58%         |
| Inequality and access                                         | 74.66%    | 14.33%  | 11.02%        |
| Lack of transparency or credit when AI modifies a performance | 91.18%    | 5.79%   | 3.03%         |
| Misuse of AI-generated content                                | 94.77%    | 4.13%   | 1.10%         |
| Impact on unions and contract negotiations                    | 74.93%    | 17.36%  | 7.71%         |

Actors show extremely high concern overall, but the intensity is not evenly distributed across topics. The strongest concentration is around misuse and loss of control, with “misuse of AI-generated content” (94.8%) and “lack of transparency/credit when AI modifies a performance” (91.2%) sitting at the very top. In other words, the primary anxiety here is not abstract: it is about what happens to an actor’s work and identity once AI enters the chain? Misuse is the only item with less than 4 respondents that are “not concerned”.

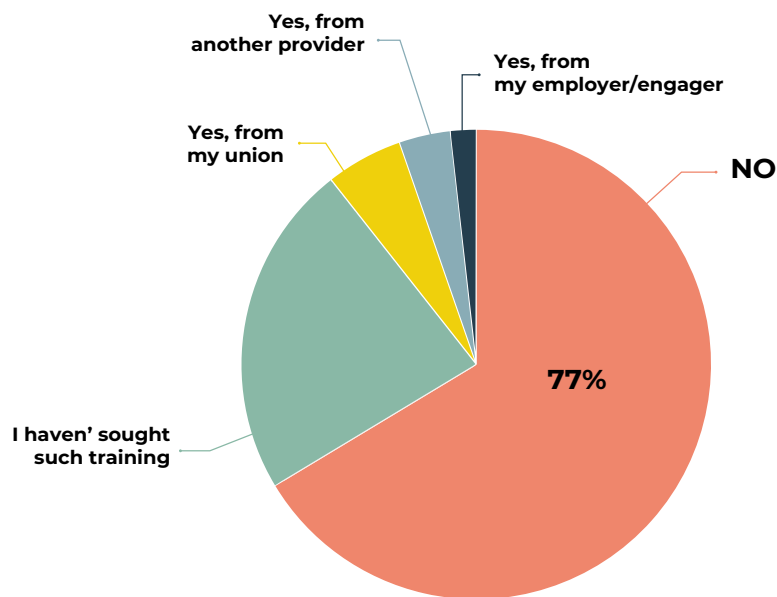
A second major theme is authenticity and quality, where “quality loss in storytelling/emotional nuance” is also extremely high (90.1%), alongside deepfakes/synthetic actors and misuse of likeness. This suggests actors are worried about both professional harm (credits, consent, traceability) and audience-facing harm (what “performance” becomes when mediated or replaced).

What is relatively less dominant in actors is job loss and automation, which is still high (68.6%) but is the lowest high-concern item in this sector. That matters because it hints that actors frame AI risk less as “generic automation” and more as identity replication, unauthorized reuse, and creative integrity.

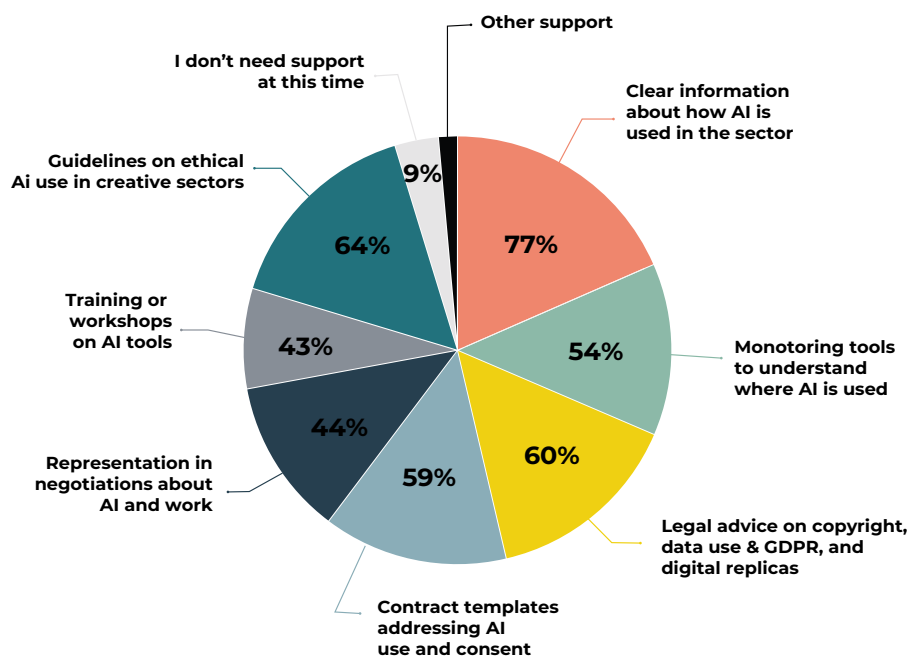
Compared with the other sectors, actors are especially distinctive in how central likeness/voice/body misuse is to their worry profile. Where crew and animation focus more on pipeline replacement and craft displacement, actors’ concern structure is more personal and rights-oriented, even when overall concern levels are similarly high.

## Training & support

The vast majority of actors declared having received no guidance or training related to AI or not having sought such training. Just over 6% of members said they had received a form of training or guidance from their union and/or other provider of employer.



When we look at the answers actors gave on the question what type of support would help them to deal better with the impact of AI we see that information is the key priority. A large majority (77%) want transparent communication about how AI is applied within the sector, while around two-thirds call for ethical guidelines (64%) and contract templates that address consent and AI usage (59%). Many also seek legal advice (60%) and monitoring tools (54%) to track where AI technologies are being introduced. Training needs are also significant (43%), alongside a call for representation in negotiations about AI and labour (44%). Only a small fraction (9%) indicated they currently need no support.

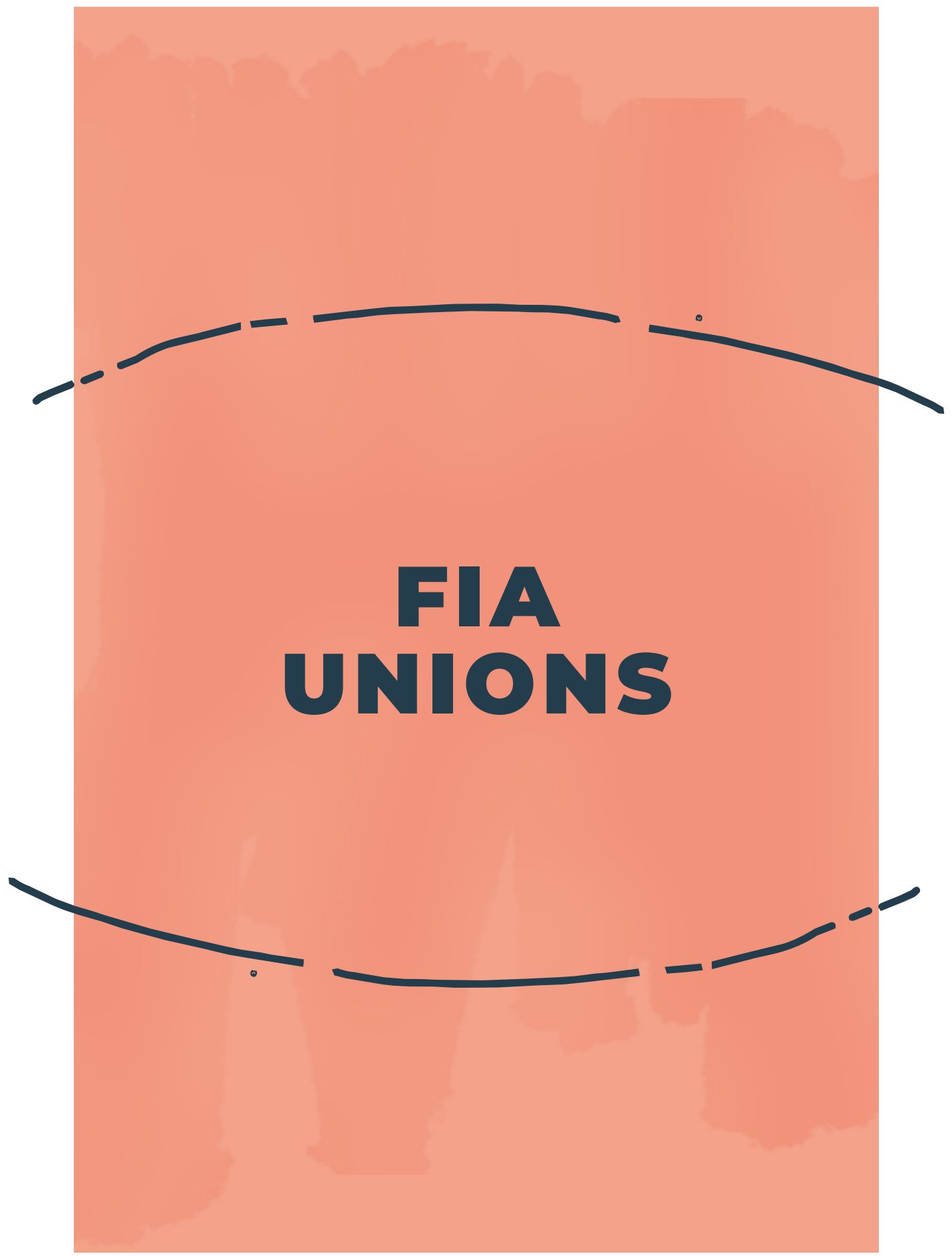


The open responses give a powerful glimpse into actors' concerns and expectations. Someone summarises the essence of the need for information: *"Information about facts is always a basis for understanding what problems, advantages or disadvantages await us"* Others already testify about misuse or AI-related damage

*"AI has demonstrably copied content from my work as an author and director - it has been trained to do so without any payment for me - there are already widely organized lawsuits in the USA - it would be good if this happened in Europe as well." or "Unfortunately, some producers are currently engaging in very unethical practices: for example, they ruthlessly recast actors who refuse to accept contracts without AI clauses. They simply lose their jobs, and it's questionable whether they'll ever be hired again if they haven't signed the offered contract. This is a very worrying development, and I therefore want clear AI regulations from the government."*

This person's call for more and better legislation is not the only one. Others echo the need for **"laws and regulations governing AI"** or **"labelling requirement for AI-generated content"**. Someone stresses the fact that the sector **"must stay ahead of the use of AI. Not run behind the bandwagon and shout "Stop!" Once the AI bandwagon is rolling and profitability is taking off, nothing can stop it!"**.

Another respondent just mused that **"I don't know what help I would need."** while someone else states **"I avoid everything with AI. Only human relationships and conversations interest me. As well as nature, animals, time, space, colours, passion."**



# **FIA UNIONS**

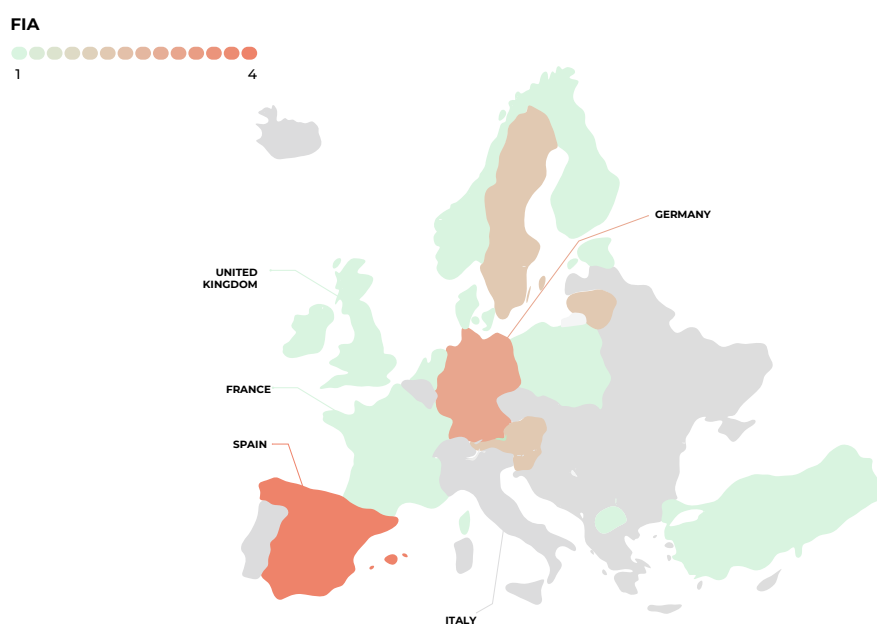
**Respondents:** 27 performers' unions

**Geographical Focus:** 18 European countries

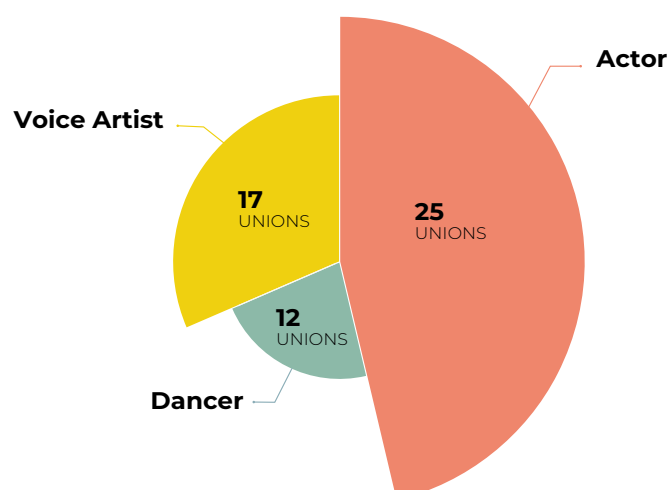
**Federation:** FIA (International Federation of Actors) Note on terminology: for the purposes of this report, the cohort of members of FIA and its affiliates are referred to as "actors", however, as detailed below, many FIA unions also organise dancers and other performers, whose reflections are also included.

## Profile of the Unions: Who represents the actors?

The FIA union respondents are spread across a broad set of European countries, with more than one affiliated union responding in Spain, Germany and Slovenia. Responses were also received from unions or associations based in Finland, Luxembourg, the United Kingdom, Norway, Denmark, Turkey, France, the Netherlands, Poland, Ireland and Estonia, providing coverage that spans both larger and smaller audiovisual markets.



Across these countries, unions mainly represent actors in audiovisual and live performance (25 responses), alongside substantial representation of voice artists (17) and dancers (12). This confirms that the performer cohort in the survey primarily reflects screen and stage actors, dubbing and voice-over professionals, and dance workers, including those in freelance or atypical employment. As clarified previously, this cohort will be referred to as "actors" for the purposes of this report, but should be understood as covering this wider group.

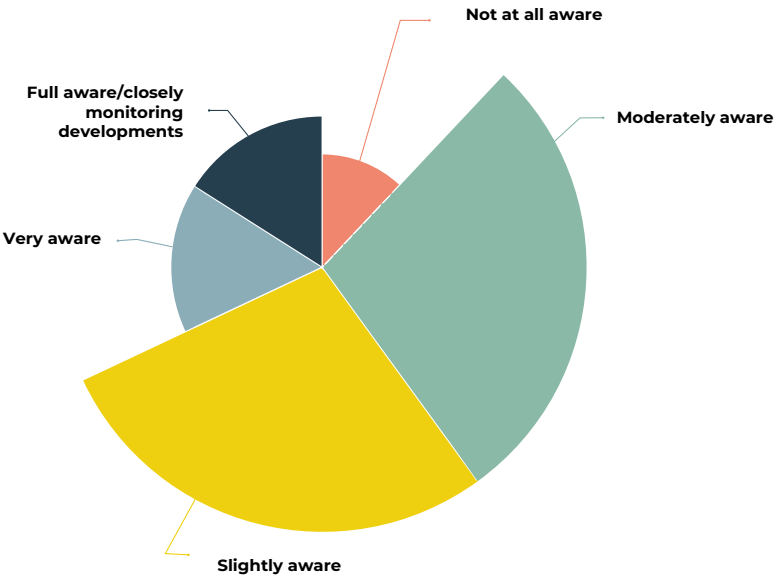


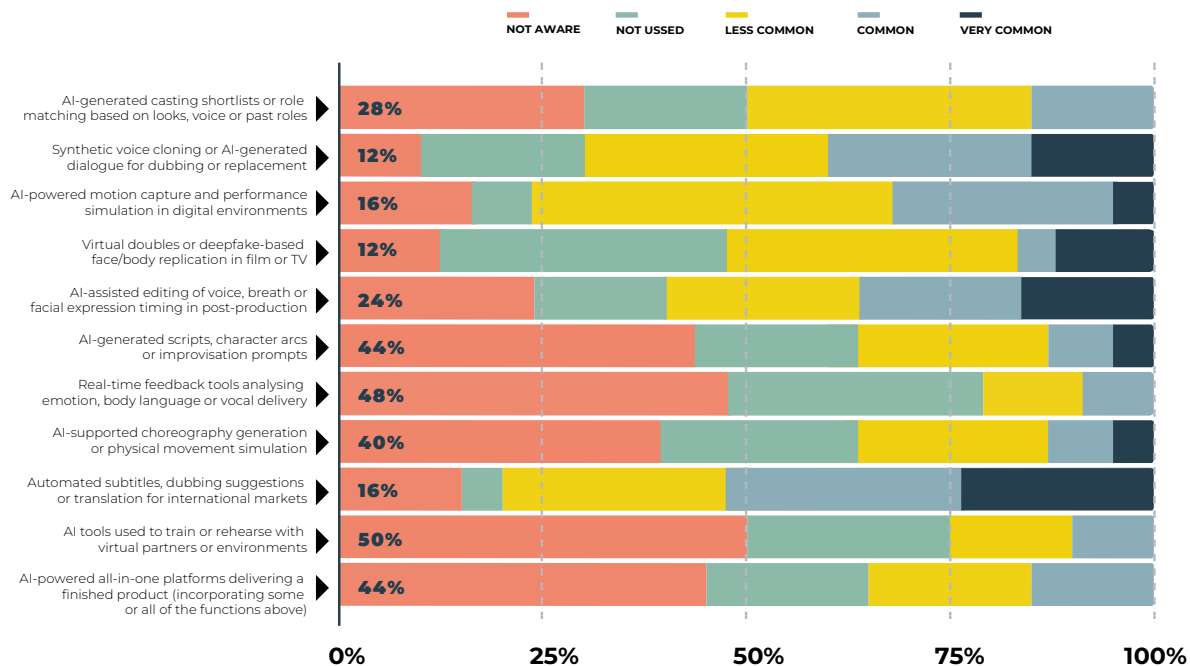
The FIA survey covers unions that represent actor cohorts of very different sizes. Two respondent organisations report having up to 250 members in the relevant cohort, while seven place their cohort between 251 and 500 members and five between 501 and 1,000 members. At the upper end of the distribution, five organisations report cohorts between 1,501 and 2,000 members, four between 2,001 and 3,000, three between 3,001 and 5,000, and one union reports more than 5,000 members in this actor cohort.

|           |   |
|-----------|---|
| 0-250     | 2 |
| 251-500   | 7 |
| 501-1000  | 5 |
| 1001-1500 | 0 |
| 1501-2000 | 5 |
| 2001-3000 | 4 |
| 3001-5000 | 3 |
| 5001+     | 1 |

AI Awareness

Most responding FIA unions report at least some familiarity with AI use among actors in their sector. Three organisations say they are not at all aware, while seven are slightly aware and seven moderately aware. Four unions describe themselves as very aware and another four as fully aware or closely monitoring developments, indicating that roughly half of respondents place their awareness at the upper end of the scale.





FIA unions report that AI use in actor work is present but uneven across different applications. On average, 30.4% of responses fall into “not aware”, 20.1% into “not used”, 41.9% into “less common” or “common”, and 7.6% into “very common”.

Awareness is highest for synthetic voice cloning/AI-generated dialogue, motion-capture-based performance simulation, virtual doubles/deepfakes, AI-assisted post-production edits, and automated subtitles/translation: these items have non-awareness rates between 12–24%. Awareness is lowest for real-time feedback tools, AI-supported choreography, AI-generated scripts/prompts and all-in-one platforms, where 40–48% of unions say they are not aware.

For most applications, “less common” and “common” together account for about 40–60% of responses, with the highest shares for motion-capture/performance simulation (76% less common/common/very common), automated subtitles/translation (80%), and synthetic voice cloning (72%). “Very common” remains below 24% for all items and is most often reported for subtitles/translation (24%), synthetic voice cloning (20%), and AI-assisted timing edits (16%).

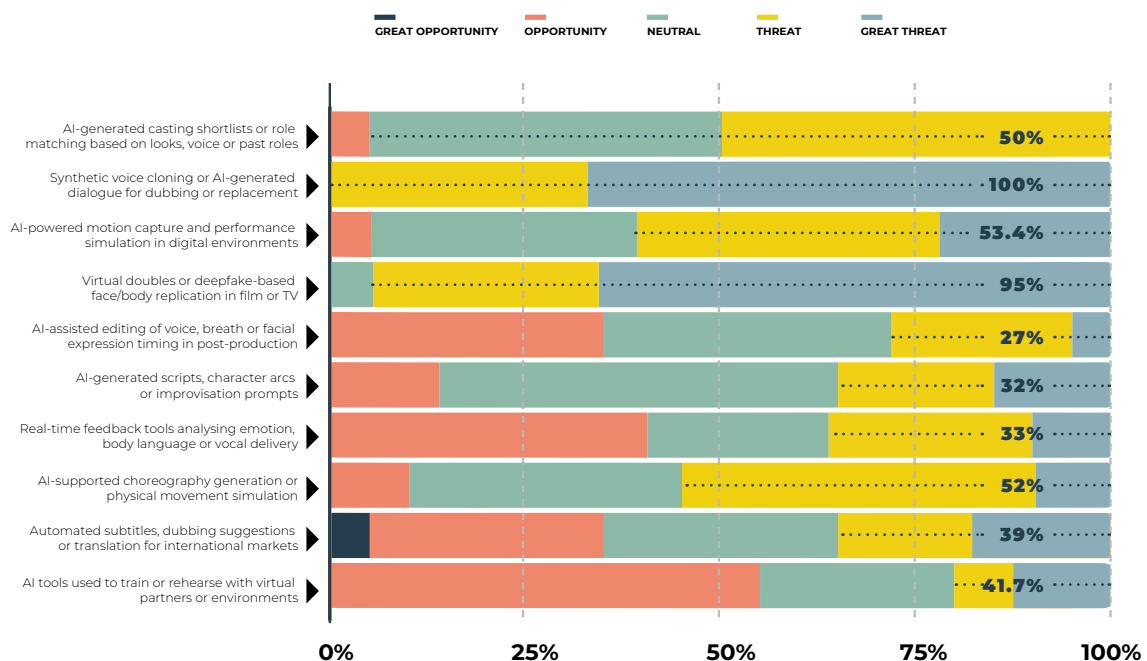
“Not used” ranges between 4% and 36%. It is lowest for automated subtitles/translation (4%) and motion-capture simulation (8%), and highest for virtual doubles/deepfakes (36%) and real-time feedback tools (32%). Overall, these responses indicate that unions see AI already in use around voice, motion capture, doubles and language workflows, while they report lower awareness and more limited use for feedback-, choreography- and platform-type tools.

By comparing the tools that are seen as “common” or “very common” to the percentage of respondents that said not to be aware of these tools, we see the gap of how “normal” certain uses of AI are in this sector.

|                                                                                                                  | USE | NOT AWARE |
|------------------------------------------------------------------------------------------------------------------|-----|-----------|
| AI-generated casting shortlists or role matching based on looks, voice or past roles - Not Used                  | 20% | 28%       |
| Synthetic voice cloning or AI-generated dialogue for dubbing or replacement                                      | 44% | 12%       |
| AI-powered motion capture and performance simulation in digital environments                                     | 32% | 16%       |
| Virtual doubles or deepfake-based face/body replication in film or TV                                            | 16% | 12%       |
| AI-assisted editing of voice, breath or facial expression timing in post-production                              | 36% | 24%       |
| AI-generated scripts, character arcs or improvisation prompts                                                    | 12% | 44%       |
| Real-time feedback tools analysing emotion, body language or vocal delivery                                      | 8%  | 48%       |
| AI-supported choreography generation or physical movement simulation                                             | 12% | 40%       |
| Automated subtitles, dubbing suggestions or translation for international markets                                | 52% | 16%       |
| AI tools used to train or rehearse with virtual partners or environments                                         | 8%  | 50%       |
| AI-powered all-in-one platforms delivering a finished product (incorporating some or all of the functions above) | 16% | 44%       |

## Perception

Among actors' unions, perceptions of AI applications cluster mainly around "neutral" and "threat", with very few seeing them as a "great opportunity." On average across these items, 19% describe them as an opportunity or great opportunity, 29% as neutral, and 51% as a threat or great threat.



Subtitles/dubbing/translation is the only item with a small “great opportunity” share (4%), and also shows one of the higher “opportunity” shares (35%). Real-time feedback tools analysing emotion, body language or vocal delivery are seen as an opportunity by 38% of the respondents. AI-assisted editing of voice, breath or facial expression timing in post-production by 32%.

The clearest threat-oriented perceptions remain synthetic voice cloning and virtual doubles/deepfakes. For voice cloning, 32% see it as a threat and 68% as a great threat (0% opportunity), while virtual doubles/deepfakes show 27% threat and 68% great threat (again 0% opportunity).

AI-generated casting shortlists, AI-generated casting shortlists or role matching and AI-assisted editing in post-production get the highest “neutral” response. However, AI-led casting is seen as a threat by 50% versus 45% neutral.

The only applications where opportunity comes close to or overtakes neutral and threat are AI-assisted timing edits (32% opportunity vs 41% neutral) and especially training with virtual partners (52% opportunity vs 26% neutral), plus subtitles/dubbing/translation (35% opportunity, 22% neutral). Even there, combined threat + great threat remains substantial (typically 27–39%), so perceptions of upside and risk clearly coexist rather than one side dominating.

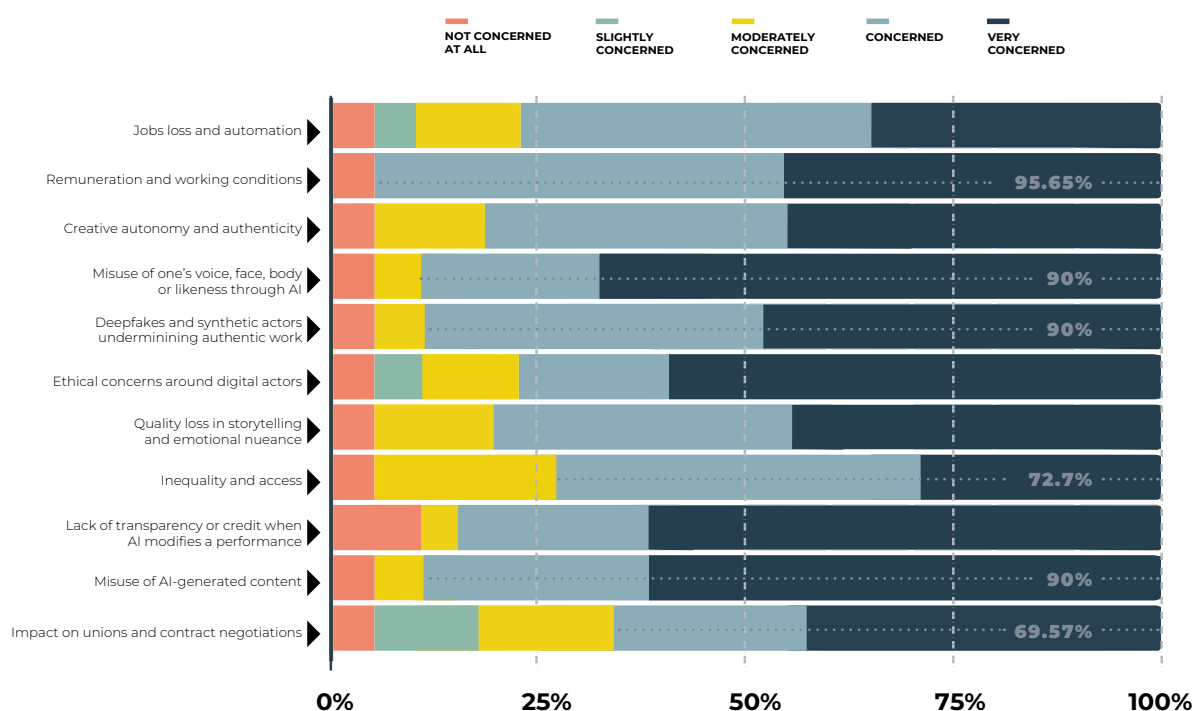
The above graphic shows the distribution of Likert-scale scores from “great opportunity” to “great threat”. In the table below, we distinguish between opportunity (= great opportunity + opportunity), neutral, and threat (= threat + great threat).

|                                                                                                 | THREAT | NEUTRAL | OPPORTUNITY |
|-------------------------------------------------------------------------------------------------|--------|---------|-------------|
| AI-generated casting shortlists or role matching based on looks, voice or past roles - Not Used | 50%    | 45%     | 5%          |
| Synthetic voice cloning or AI-generated dialogue for dubbing or replacement                     | 100%   | 0%      | 0%          |
| AI-powered motion capture and performance simulation in digital environments                    | 53,4%  | 32%     | 5%          |
| Virtual doubles or deepfake-based face/body replication in film or TV                           | 95%    | 5%      | 0%          |
| AI-assisted editing of voice, breath or facial expression timing in post-production             | 27%    | 41%     | 32%         |
| AI-generated scripts, character arcs or improvisation prompts                                   | 32%    | 55%     | 14%         |
| Real-time feedback tools analysing emotion, body language or vocal delivery                     | 33%    | 29%     | 38%         |
| AI-supported choreography generation or physical movement simulation                            | 52%    | 39%     | 9%          |
| Automated subtitles, dubbing suggestions or translation for international markets               | 39%    | 22%     | 39%         |
| AI tools used to train or rehearse with virtual partners or environments                        | 41,7%  | 26%     | 52%         |

## Concerns

Across all topics, FIA actor unions report very high concern about AI, with between 69.5% and 95.6% (with an average of 83.7%) of respondents marked as “concerned” or “very concerned” for each item. On average across the list, 4.7% are “not concerned at all”, 2% “slightly concerned”, 9.6% “moderately concerned”, 34.7% “concerned” and 49.2% “very concerned”, with the result that concern and very high concern clearly dominate the response pattern.

The item “Remuneration and working conditions” gets the highest concern score (95.65%). Deepfakes and synthetic actors undermining authentic work, misuse of one’s voice, face, body or likeness through AI and misuse of AI-generated content all score above 90% concern. The “lowest” concern goes to the impact on unions (69.57%) and “Inequality and access” (72.7%) that also gets the highest “neutral” score (22.7%).



In their written explanations, unions describe these concerns as spanning legal, cultural and social dimensions. One union calls AI use in the sector *“still undefined”* and says that *“the power this technology brings poses significant threats”*, noting that they are *“currently working on the legal defence against some of these threats (replacement, deepfakes, misuse)”*, but that *“social debates are not occurring with the same intensity”* as legal developments. Another reports practical obstacles in collective bargaining: *“we are unable to include the clauses drafted with a lawyer in our contracts that would protect us from abuses generated by AI. The producers’ association is hindering the inclusion of these clauses”*.

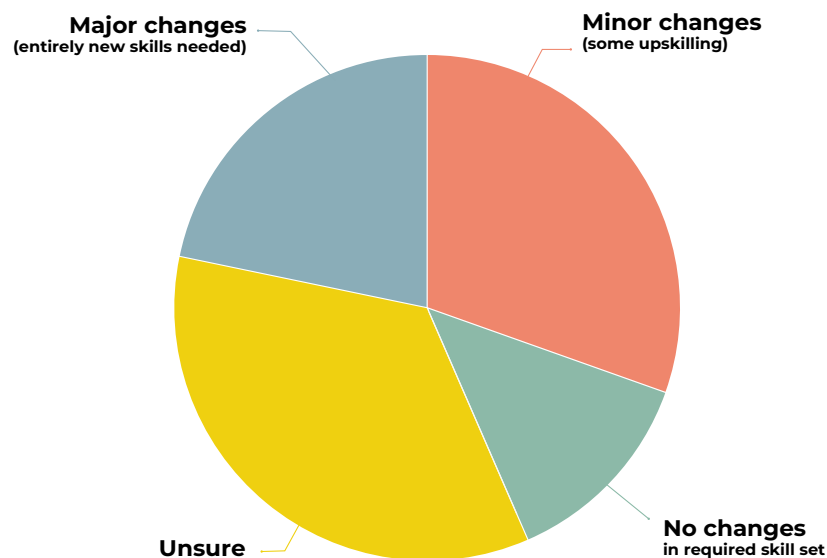
Several contributions link high concern on job loss, likeness and misuse to concrete experiences, especially in voice work. One union writes that they are *“already seeing misuse, especially in the non-commercial sector, and a decrease in available jobs for voice actors”*, and another describes *“the theft and exploitation of their voices ... without the artist’s consent and without compensation”*, alongside *“an increase in deepfakes in the pornography industry”*. Others stress enforcement and transparency problems: *“one of the biggest problems we have is not having enough data about how AI is generating the contents”*, and *“when it comes to AI generation, we don’t know who we are talking to. This undermines the essence of our work”*.

Some comments emphasise distributional and cultural effects behind the concern scores on inequality, access and quality. One union warns that AI *“could become a class issue”*, lowering prices for AI-generated content *“of lower value”*, so that some groups retain access to *“the real thing”* while *“low income groups*

and middle class groups with no cultural background have none". Another situates AI in a longer history of technological revolutions oriented to *"cost optimization, faster production, and the availability of cheaper goods and services"*, and fears that if live performance remains *"a bastion of authenticity"* it may become *"more elitist, only for those who can afford it"*, while ubiquitous digital content *"will diminish all the elements of collective culture that come with attending a theatre or a movie theatre"*.

Finally, unions underline that they are trying to respond within different national contexts. A union notes that their AV landscape is *"small and easier to manage (we mostly all know each other)"*, that AI use *"would therefore quickly become known"* and may currently be limited by cost, but that *"there are more opportunities for abuse in dubbing and subtitling"* and *"there is still no collective agreement for the AV sector in Slovenia"*. An Estonian union states *"We believe that there is a risk in all options, but we believe that the Estonian film industry is small enough and the domestic audience wants to see its actors. The belief is the same in the case of voice work, but we perceive a greater risk in the case of job loss. We are actively working with the state and market participants to create good practices and strong legislation that would protect the work of members, their fees and, if necessary, create a compensation measure."*

## Impact on skills and jobs



Several unions state that core acting skills have not yet fundamentally changed. One notes that *"no AI-related skills are required for our members to obtain work"* and that *"the skill set needed to get jobs has not changed"*, while another expects *"different new tasks when filming"* but finds it *"difficult to say if any new skills are needed in acting itself"*, apart from *"a lot of technical education and also new technical knowledge in negotiating contracts"*.

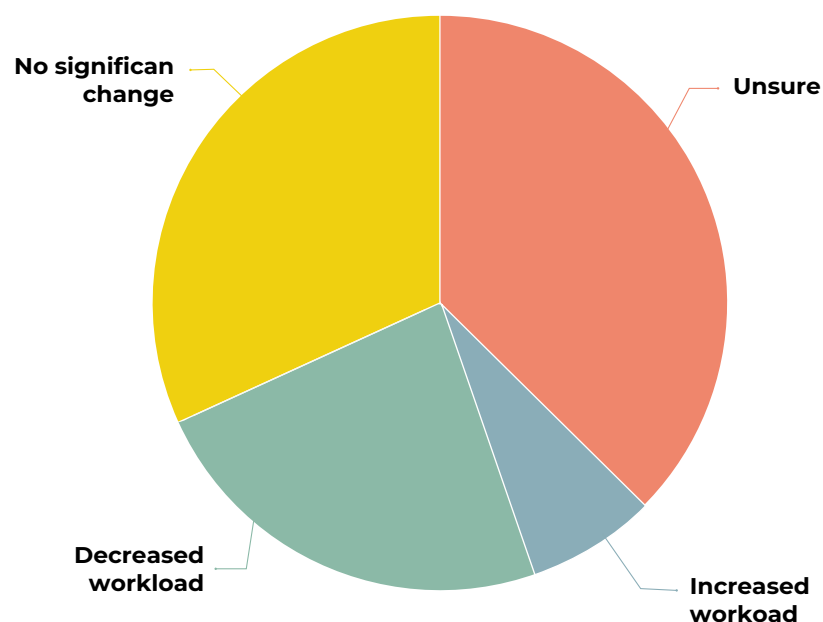
At the same time, multiple unions see AI reshaping the wider professional environment, especially in post-production, dubbing, casting and digital performance. One contribution argues that *"the greatest impact will be in post-production, with a neutral impact on the employment of actors"*, but that actors *"must have a greater awareness of their image and voice"*, as these become *"a fundamental asset"*, requiring *"greater knowledge of digital terminology"* and *"empowerment regarding the right to one's own image"*. Another stresses that members *"increasingly need to understand how AI can alter or replicate their image, voice and performance"*, and that this requires *"technical literacy (working with virtual environments, motion capture, or AI-assisted dubbing)" as well as "legal and ethical awareness regarding consent, data use and performance rights in the digital sphere"*.

There is also a strong current of scepticism and fear of replacement. Some unions write that *“as actors, we are very concerned about the arrival of AI”,* and that *“regarding skills, we don’t see how we can improve because it’s about replacing us completely or partially. It’s not about improving or adapting”.* Another states that they *“don’t see how performing artists could be trained to work with AI”* and that *“the intention of those who own AI models is to provide a means of replacing performing artists’ jobs by exploiting their labour”.* One comment summarises this tension by saying: *“actors nowadays use AI as a tool to get help but the industry is using AI to replace the workers”.*

Several unions stress that impacts differ by role. Voice actors are described as *“the first in the firing line”,* with jobs *“already fading away”* and in many cases *“beyond repair”,* implying that *“new skills [are] needed, to be able to do entire new/other things”,* or possibly *“go in depth with studying technology and being able to make a (several) clone(s) of your own voices and stay in business that way”.* For screen actors and dancers, unions more often mention *“upskilling”* to act on virtual sets, with digital characters or in mixed environments, rather than complete restructuring of their craft.

Some unions also point to country-specific contexts. A Slovenian respondent notes that, given *“the small and recognizable AV production”* and the specificity of the language, they *“have not yet noticed the impact of AI on the AV landscape and/or the skill requirements of our members”.* An Estonian union sees potential in AI *“as a tool for Estonian actors, for example, when making self-tapes and reaching foreign markets”,* but stresses that *“members need to be educated and made aware of the dangers associated with the use of AI and the contractual traps”* where actors might *“train an artificial intelligence with a performance”* without realising it.

Across the comments, unions agree that some new competencies are emerging – especially around digital self-presentation (self-tapes, virtual environments), contract literacy (AI clauses, rights to image and voice) and basic technical skills – but they also underline that these do not automatically translate into better or better-paid work. One union notes that *“technical requirements for selfies and editing are constantly increasing, without this resulting in better or better-paid work”,* and that such practices *“represent a general reduction in costs that doesn’t translate into higher salaries for artists”.*



Several unions report limited or not yet clearly measurable impact on acting employment overall. One notes that *“at the moment we do not observe a large impact of AI tools in the acting field, which has not yet generated major changes in the volume of employment”,* and another says *“it has definitely had an impact, but it’s hard to say in what way”.* Some emphasise that they *“haven’t yet had the opportunity to assess its*

*impact*” and that *“a full picture hasn’t been formed yet”*, while still assuming that, as with earlier technologies, AI may *“decrease some workloads while increasing others”*, without increasing artists’ remuneration.

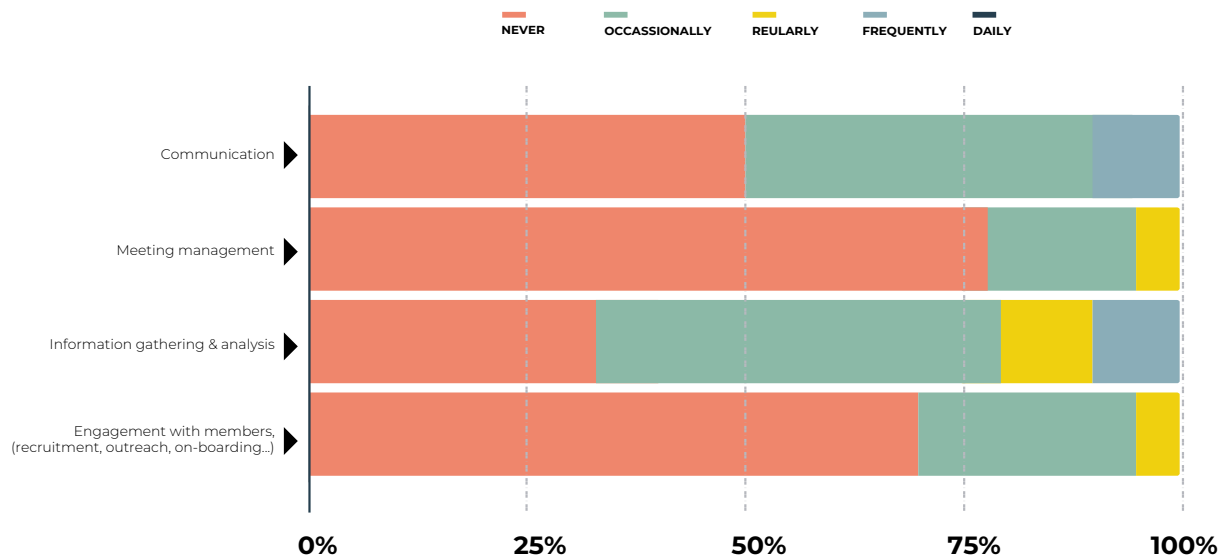
By contrast, impacts in voice and dubbing work are described as concrete and negative. Unions report that *“our voice actors, especially in the gaming sector, are already experiencing a decrease in available jobs”*, that *“when AI replaces us for things like dubbing, we automatically lose days of work”*, and that *“voice-over artists who previously recorded multimedia educational materials have been replaced in part by AI-generated voices”*. One contribution summarises that, *“what I hear from voice actors [is that] there is an obvious and visible decrease in work. AI is definitely one of [the reasons], even if not the only factor.”*

Some unions highlight a distinction between workload on existing jobs and overall job opportunities. One states that they are *“not seeing a decrease or an increase in workload BUT a decrease in employment opportunities”*, because for audiobooks, documentaries, cartoons, advertising and some image-based work *“AI is being used to the detriment of artists who could have worked on these projects”*. Another notes that actors *“now face an increased workload”* in terms of responsibilities—*“protecting their digital likeness and understanding AI-related clauses in contracts”*—even when day-to-day tasks on set have not yet changed dramatically.

The comments also mention sectoral and national differences. An Estonian union notes that there have been isolated cases regarding voice-overs and audiobooks, but that the language *“robots are not yet good enough”* and the market remains *“heavily dependent on the actor”*; at the same time, they recognise that *“as for the big players in the world, it’s hard to assess the impact at the moment, but it’s definitely there”*.

Finally, some unions point to industry hesitation and preparation. One reports that *“there is still a hesitance from producers to use AI technology. It doesn’t really deliver, but it’s also uncertain when it comes to IP-rights. It’s like we are waiting for it to happen”*, while another describes Dutch studios already using AI tools for small voice recordings (like breaths, one word etc.) and body scans before shooting, as signs that *“the industry is preparing for more and more use of AI”*

## AI in Unionwork

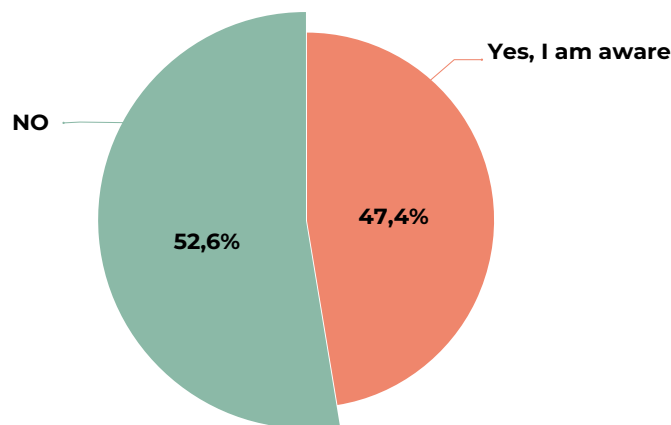


Across these four union functions, AI use is generally low and mostly occasional. For all items, no respondents report daily use, and “frequently” appears only in communication (5%) and information gathering & analysis (9%).

- **Communication:** 50% say they never use AI, 45% use it occasionally, 5% frequently, and none use it regularly or daily.
- **Meeting management:** 76% never use AI, 19% use it occasionally, 5% regularly, and 0% frequently/daily.
- **Information gathering & analysis:** 32% never use AI, 45% use it occasionally, 14% regularly and 9% frequently.
- **Engagement with members:** 73% never use AI, 23% occasionally, 5% regularly, and 0% frequently/daily.

Overall, information gathering & analysis shows the highest regular/frequent use (23% combined), while meeting management and member engagement remain largely AI-free in current union practice.

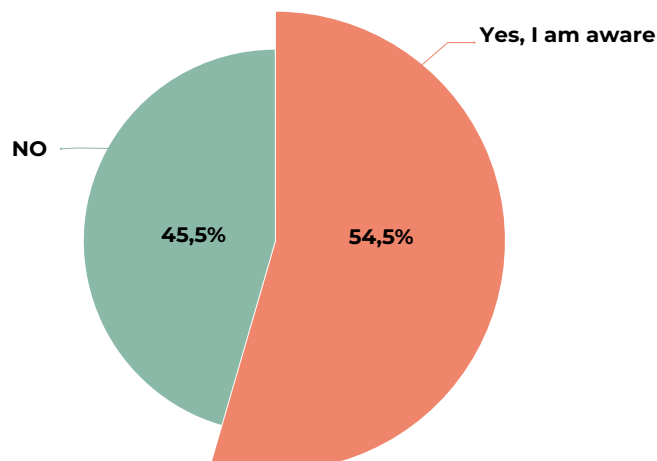
#### Awareness of Agreements



Unions report that work on AI is already visible in their bargaining agendas, but at different stages of development. Some describe early coordination, such as efforts to *“work with other unions in UK & globally to understand and share knowledge”*.

Several unions are involved in ongoing or planned negotiations. One notes that it (along with other entities in the sector) is trying to negotiate with the Ministry of Labour of the Spanish government a Royal Decree on artistic contracting that includes a clause to safeguard the rights of our actors and actresses”. A further union reports that they are *“in the process of negotiating an indigenous film agreement which will aim to include this among other issues”*.

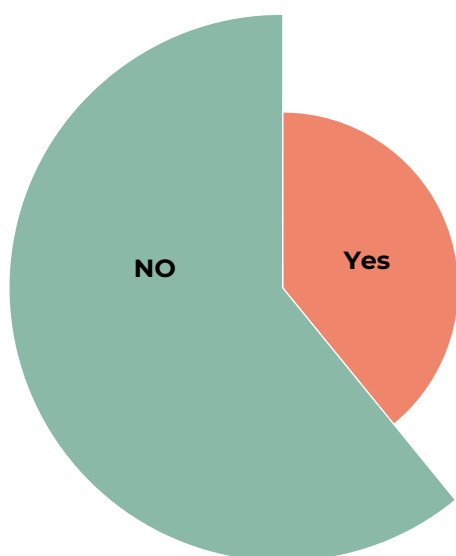
#### Awareness of Negotiations



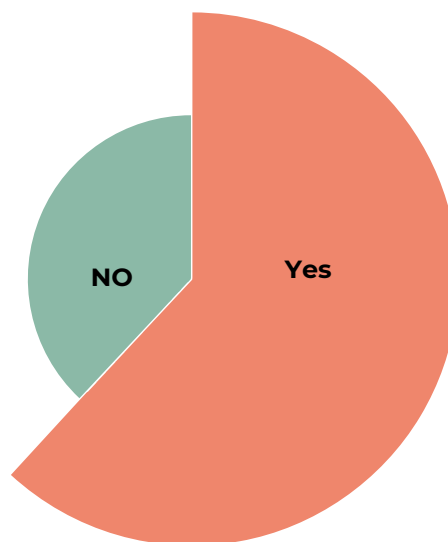
A number of respondents already report concrete AI clauses or agreements. A respondent union in Germany states that they are ***“so far ... the only one that has concluded concrete agreements regarding AI for dubbing and screen acting”***. Another lists several Dutch collective agreements (opera & ballet, orchestras, theatre & dance) that state ***“It is agreed that the Employer and the Employees shall not, without prior written consent, cooperate in any manner with the use of recordings for the training of any AI application. The Employer shall, using all reasonable means available, endeavour to prevent any recorded material from being used, downloaded, or scraped for the purpose of training AI applications or generating material by means thereof. The Parties shall continue to engage in dialogue regarding the development and responsible use of AI. The Parties further attach importance to continuously monitoring developments in this field.”*** A French union reports an agreement in public radio ***“prohibiting AI without the express consent of artists”***, as well as difficult negotiations in dubbing, film and audiovisual, and joint advocacy for an AI clause in the video-game industry. In Estonia, a Good Practice Agreement between the Actors' Association and the Film Industry Cluster includes clauses that ***“prohibit the training of artificial intelligence through performances”***, although ***“there are currently no remuneration or compensation measures”***.

Unions also refer to specific sector examples and public agreements. One respondent notes that they also unionise musicians and have seen ***“several contracts ... where the artist is asked to give away a right for the purpose of training and generating with the use of AI”***. Others point to German agreements on AI with producers and platforms, citing union press releases on tariff agreements and rules for AI use with Netflix as reference points. At the same time, some unions stress that discussions remain ***“very tentative because there's a lot of ignorance about the potential impact”***, and that, particularly in dubbing and image-rights sectors, they are ***“already starting to recommend including protective clauses in contracts”***, even where formal collective agreements do not yet exist.

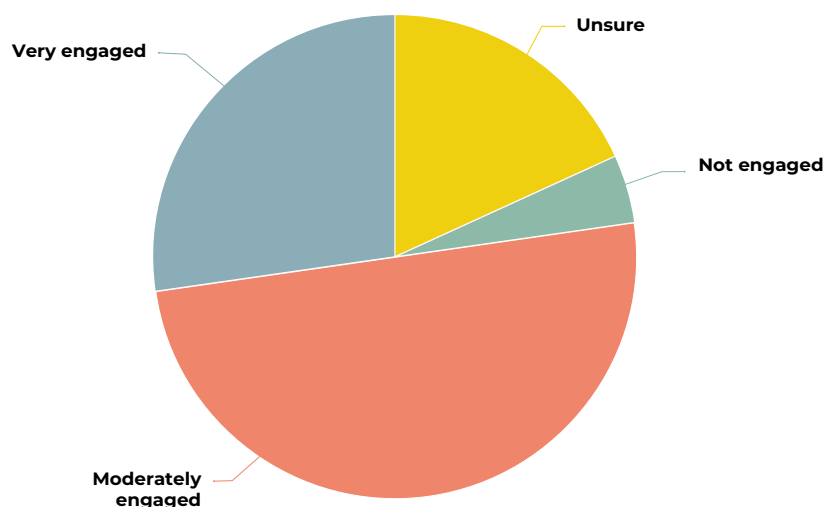
Has your union been involved in collective bargaining related to AI use, impact on working condition and/or remuneration?



Has your union been involved in advising and or drafting contract (templates) or other forms of support to members related AI use, impact on working conditions and/or remuneration



### How engaged is your union in AI-related union or policy negotiations at the national or EU level?



These responses show that many unions are already active around AI in policy, legislation and collective bargaining, but at very different levels of intensity and maturity.

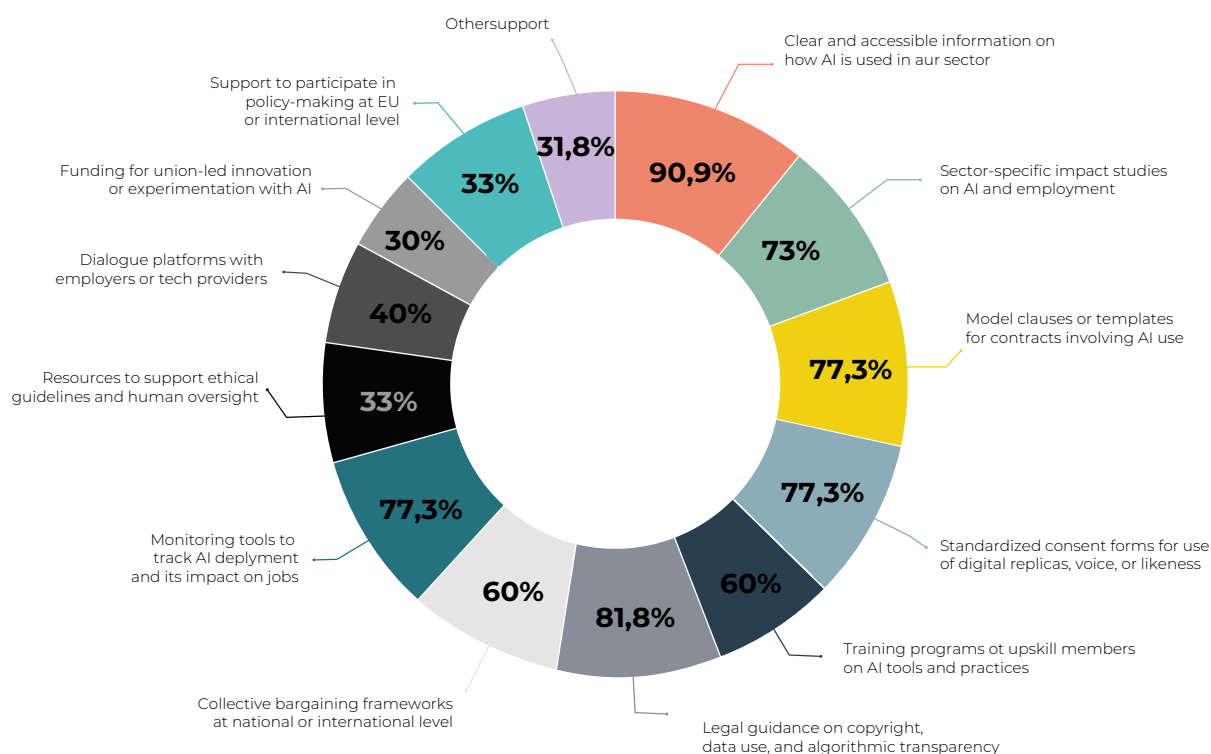
Some unions emphasise formal negotiations and agreements. One reports that, at national level, it is ***“actively participating and playing a leading role in negotiations on AI regulation”*** and ***“driving negotiations within the framework of collective bargaining agreements”***, including sectoral deals with producers and platforms. Another notes that AI-related bargaining in Spain is ***“still in its infancy”***, where they ***“express our concerns in negotiation forums and warn our members against signing certain clauses that would relinquish rights for AI training”***, while detailed documents are still under development.

Others describe broad advocacy and campaign strategies. A French union recalls how, as early as June 2023, it submitted demands in letters to ministers and parliament, launched the ***“#TouchePasMaVF”*** petition (which had gathered nearly 242,000 signatures by December 2024), and participates in forums such as the High Council for Literary and Artistic Property, while also tabling AI demands in collective agreements where it is representative. In the Netherlands, the respondent union details a multi-year trajectory: publishing a position paper on AI, engaging with ministries, parliament, social partners and EU bodies, calling for a transition fund and protective clauses, running public campaigns on GenAI’s impact on jobs, and securing AI provisions in several collective agreements (for Opera & Ballet, Orchestras, Theatre & Dance) that prohibit the use of recordings to train AI and commit employers to prevent scraping and unauthorised use.

Unions also mention cooperation with other organisations and at EU level. Some work ***“with other unions in UK & globally to understand and share knowledge”***, others refer to joint appeals and statements with European federations on the AI Code of Practice and on copyright and generative AI. There are also examples of collaboration with collective management organisations (CMOs) and language institutes, such as the Estonian union’s cooperation with the Ministry of Justice and Digital Affairs and the Institute of the Estonian Language, including a specific ***“text and data mining reservation”*** to limit unconsented AI training on protected works.

Overall, these accounts indicate that AI is now a standing item in unions’ external action, ranging from early awareness-raising and defensive contract advice, through targeted national legislation and reservations on text and data mining, to concrete AI clauses in collective agreements and structured participation in European policy processes.

## Training and support

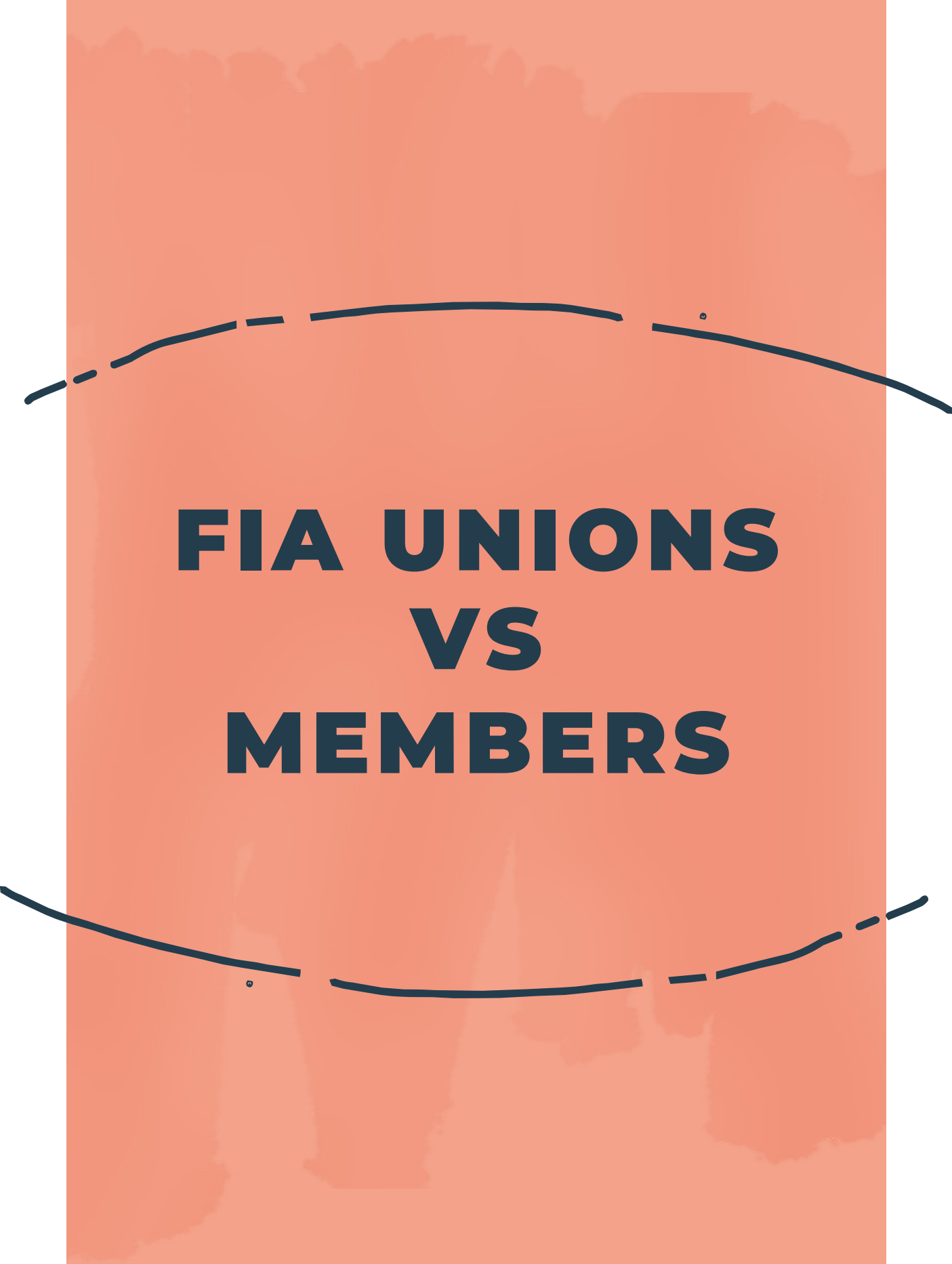


FIA unions report very high support needs across almost all listed items. Only funding for union-led innovation and digital dialogue platforms are embraced by less than 50% of the unions. The strongest needs are for clear and accessible information on how AI is used in the sector (90.9%) and legal guidance on copyright, data use, and algorithmic transparency (81.8%). Close behind are model clauses or contract templates (77.3%), standardised consent forms for digital replicas/voice/likeness (77.3%) and monitoring tools to track AI deployment and job impact (77.3%).

The **“Other support”** responses from FIA unions highlight a small but important set of additional needs beyond the predefined categories. Seven unions (31.8%) selected this option.

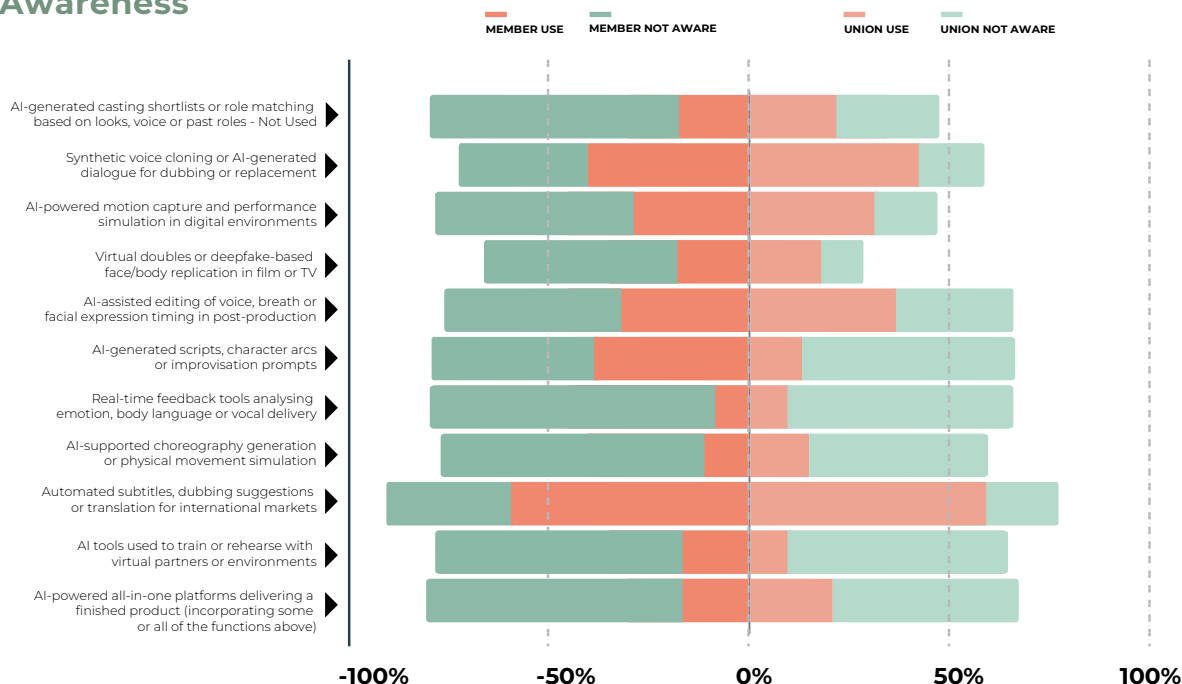
Several unions point to dedicated resources and expertise. One stresses the need for **“extra financing in tackling AI matters on top of old challenges”**, while another notes that their sector is increasingly dominated by technological tools, digital exploitation and IT developments but union staff usually has a more legal background, and suggests **“gather[ing] techno-brothers”** at umbrella level to better understand **“how the AI machine works”** and **“fight it on that (techno) level”**.

Others underline the asymmetry of resources between artists and large economic actors. One comment states that **“all the funding we pour into AI lags far behind the powerful interests that sustain economies with which artists ... cannot compete”** and concludes that unions **“must focus on legislation and the training of our members”**. Another emphasises that **“the most important thing right now is to take swift action at the EU level to ensure transparency, clarity and compensation measures”**, signalling a need for strong, coordinated regulation alongside the more operational forms of support listed in the questionnaire.



# **FIA UNIONS VS MEMBERS**

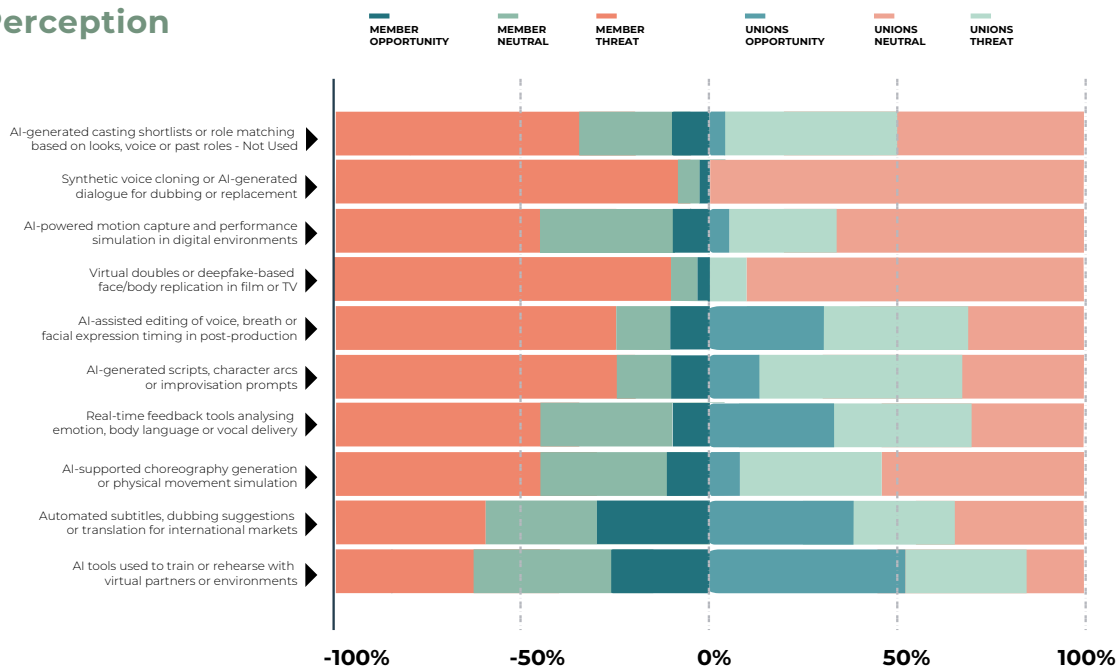
## Awareness



For AI-generated casting shortlists, Synthetic voice cloning, AI-powered motion capture and AI-assisted editing unions perceive a slightly higher use than that reported by individual actor members. It's the other way round for AI-generated scripts, Automated subtitles and AI tools used to train or rehearse. Overall unions and members differ less than 8% in reported use. Only for the AI generated scripts do we see a large difference in reported use. More than 35% of the members see it as common, very common or are using it themselves while only 12% of the unions think that use is common or very common.

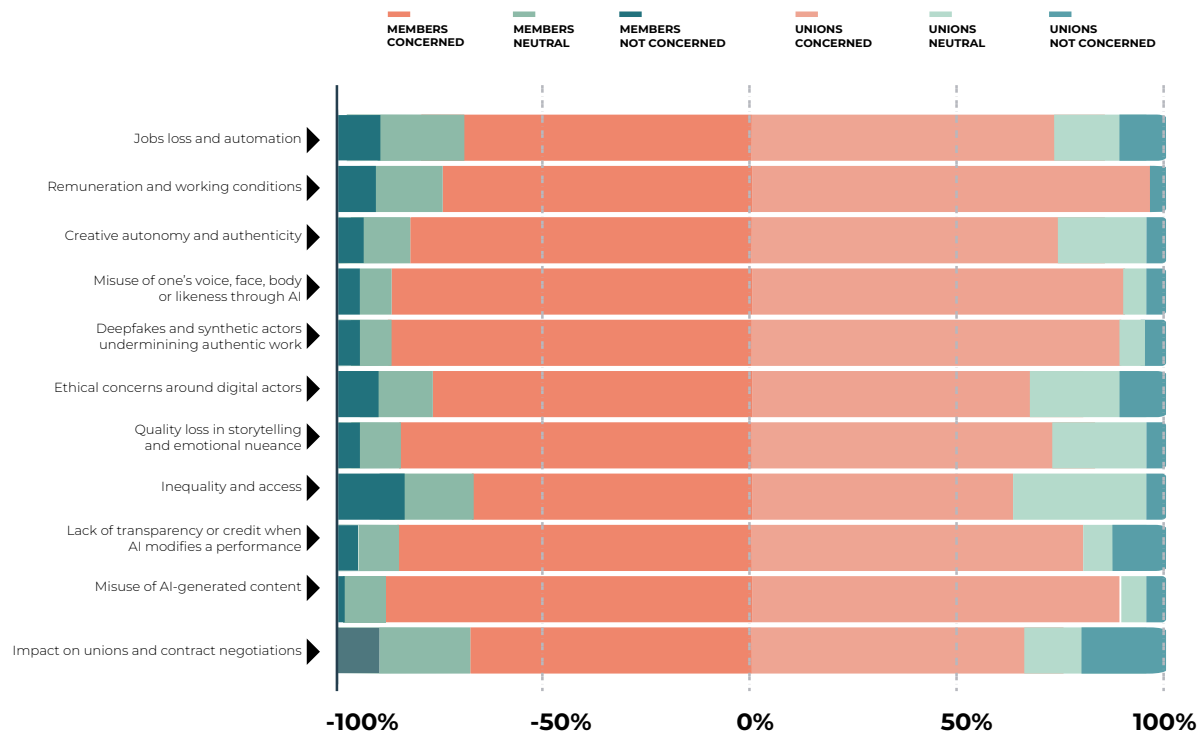
If we look at the percentages of "not aware" we see a very different trend. For almost all AI-tools the percentage of members stating that they are "not aware" exceeds the percentage of the unions with over 20%. We see the highest differences we see for AI-generated casting shortlists, AI-powered motion capture and Virtual doubles where at least 55% of the members say that they are not aware of these tools. For the same tools, only 12% to 28% of the unions give the same answer.

## Perception



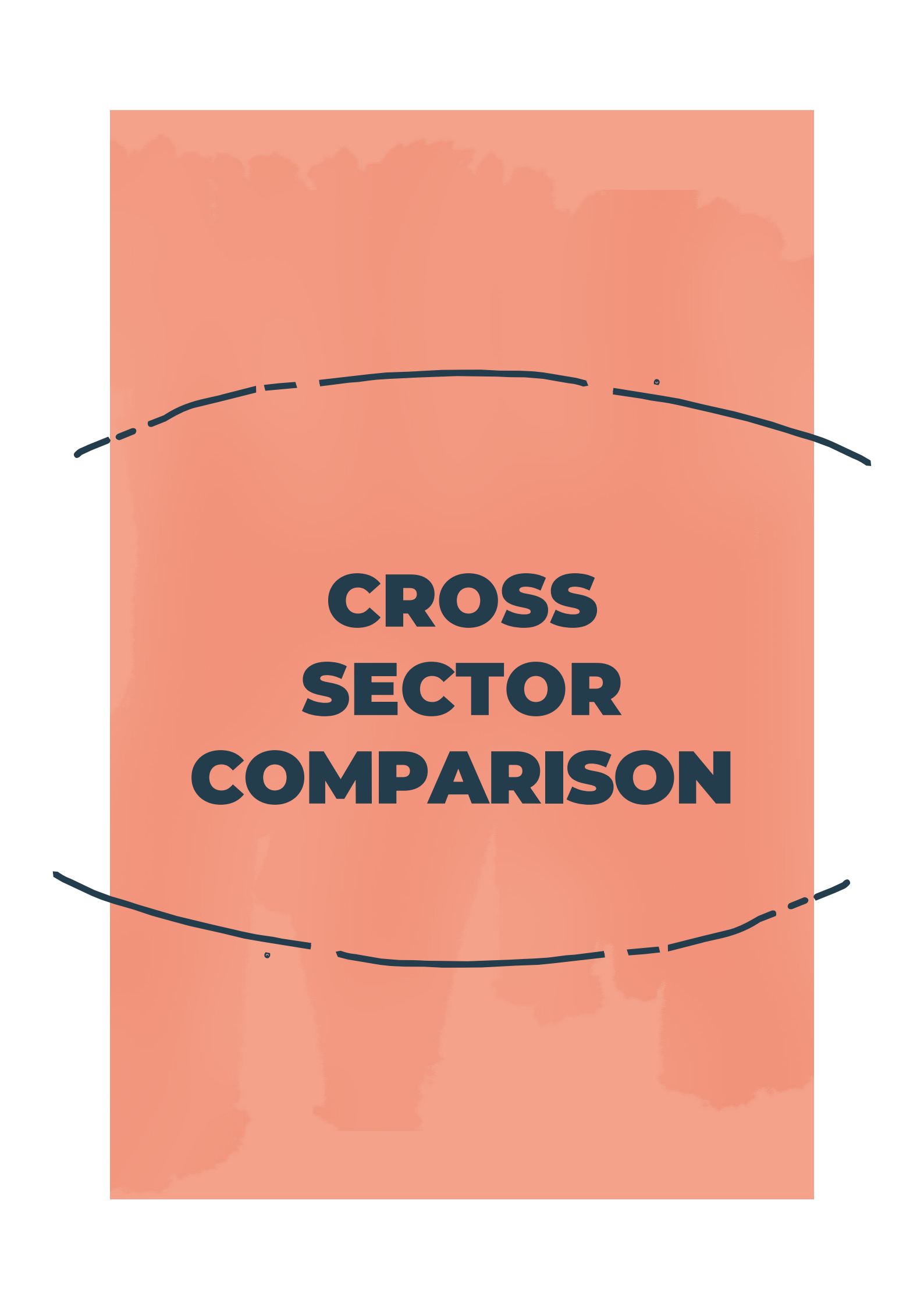
The perception of the AI tools is very much the same. Both members and unions see synthetic voice cloning and virtual doubles as the biggest threat. In some cases unions have a slightly more positive perception than members. The AI-assisted editing and real-time feedback tools are considered an opportunity by more than 30% of the unions and only 12% of the members. Even more: 71% of the members consider AI-assisted editing as a threat compared to 27% of the unions. Another big difference is the score of AI-generated scripts. For 71% of the members, it is a threat while for 55% of the unions it is neutral and 32% sees it as a threat.

## Concern



The average gap between the average score of the members versus the average score of the unions is less than 1%. But looking at the different concerns we see some big differences. The biggest difference is the amount of concern about remuneration and working conditions. 95.6% of the unions are concerned about this and only 4.3% are not concerned at all. At the member level 75.4% is concerned and 9.9% is not concerned at all.

Overall both unions and members score and average of about 83% concerned and less than 7% not concerned across the different subjects.



# **CROSS SECTOR COMPARISON**

## Introduction

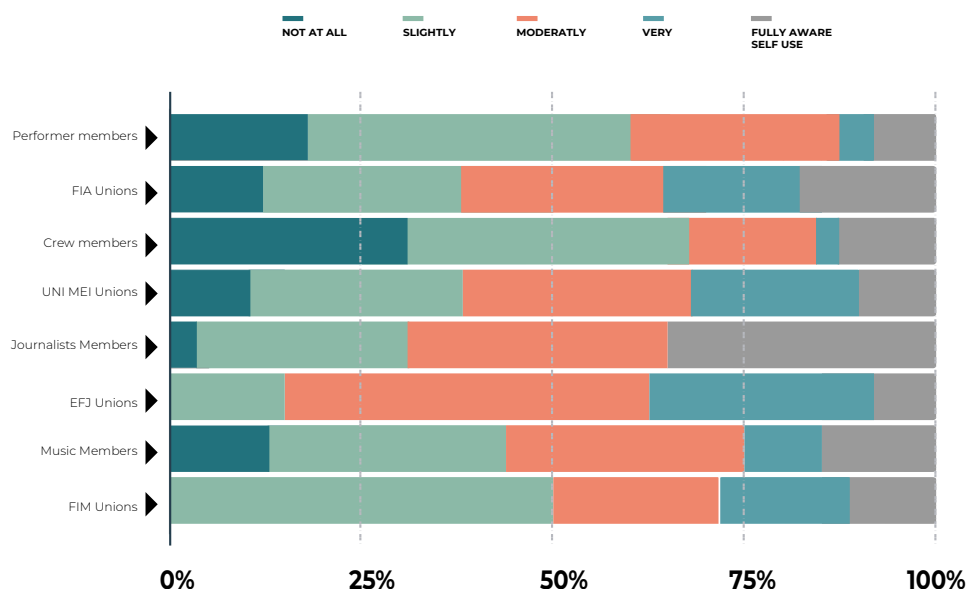
In this last part, we provide some general comparisons between the different sectors and the collected data of the union surveys and the national surveys for members. This chapter brings together the different strands of the study and looks across sectors to identify common patterns and divergences in how AI is experienced in the audiovisual, performance, music and journalism fields. Rather than examining individual case studies, it compares survey results from union organisations and their members, highlighting how perceptions align or differ on key themes such as impact, skills, concern and support needs.

The chapter thus functions as a panoramic view of the dataset, allowing the sector-specific findings from earlier sections to be read in relation to one another and to the broader strategic questions facing unions and their members in the age of AI.

## General awareness

Across the different member groups, awareness levels differ significantly, yet they share one important similarity. In most of the sectors, members mostly respond with not at all aware or slightly aware. Among actors around 18 percent are not at all familiar and about 38 percent slightly familiar, which means roughly 56 percent sit in the bottom categories, while only about 3 percent are very familiar and 7 percent fully aware or self users. Crew show a similar pattern, with around 24 percent not at all familiar and 31 percent slightly familiar, so roughly 55 percent in the bottom categories, and only about 2 percent very familiar and 9 percent fully aware or self users. Music professionals are more balanced, with roughly 11 percent not at all familiar, 27 percent slightly familiar, 26 percent moderately familiar and together about 22 percent in the very familiar plus fully aware categories. Journalists stand apart, with roughly 3 percent not at all familiar, about 29 percent slightly familiar and around 42 percent responding with fully aware or reporting self-use, which clearly makes them the most AI-exposed and AI-literate member group.

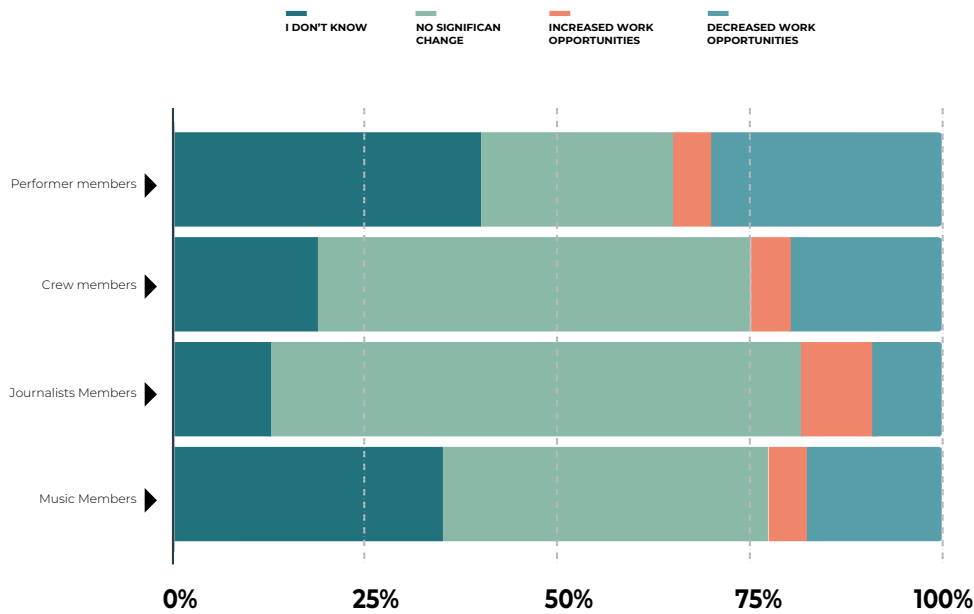
When we compare individual members with unions, a consistent awareness gap appears, although its size differs by sector. For actors (excluding musicians), around 56 percent of members surveyed are in the two lowest categories, while among FIA unions, only about 9 percent are not at all aware and roughly 21 percent are slightly aware, so around 30 percent are at the bottom, and about 45 percent are in the moderate to fully aware bands combined. For crew, roughly 55 percent of members are in the bottom categories, whereas among UNI MEI unions only about 5 percent are not at all aware and around 15 percent slightly aware, so roughly 20 percent at the bottom and about 40 percent in the moderate to fully aware categories. In music, about 38 percent of members are in the bottom categories and roughly 22 percent in the top ones, while among FIM unions, close to one-third are not at all aware, but another third sit in the very or moderately aware bands, which still lifts their high awareness share above that of music members. For journalists, roughly 32 percent of members are in the bottom categories and more than 40 percent in the top, while among EFJ unions only about 12 percent are not at all aware and roughly 22 percent are slightly aware, and close to two thirds place themselves from moderately to fully aware. In every sector the share in the lowest category is higher among members than unions, and the share in the top categories is higher among unions than members, confirming that unions operate from a more informed vantage point.



Taken together, the numbers show a structural awareness gap between unions and members, on top of clear differences between sectors. On the member side, familiarity ranges from low among actors and crew, where roughly 65 to 70 percent are not at all or slightly familiar, to relatively high among journalists, where more than 70 percent are moderately familiar or higher and about one third use AI themselves. On the union side responses of no awareness are much lower than the member side, and a much larger proportion responds with moderately, very and fully aware than amongst most member groups, especially in sectors where AI is already a “hot” topic on a policy level, for example music around intellectual property and synthetic voices and journalism around deepfakes and misinformation.

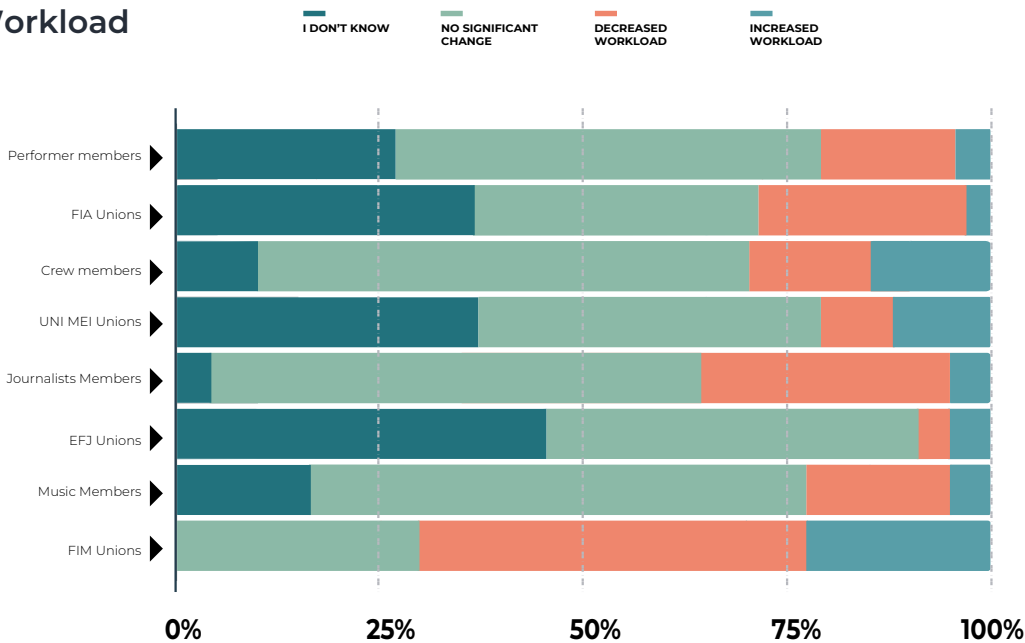
Expected impact of AI

●● Work opportunities



Across different sectors the members report very low clear impact. The percentages of “no significant impact” and “don’t know” are well over half the responses. If there is perceived impact, it mostly is negative. On average the percentage of respondents that see decreased opportunities is four times higher than those that see a increase (28% vs 7%).

●● Workload

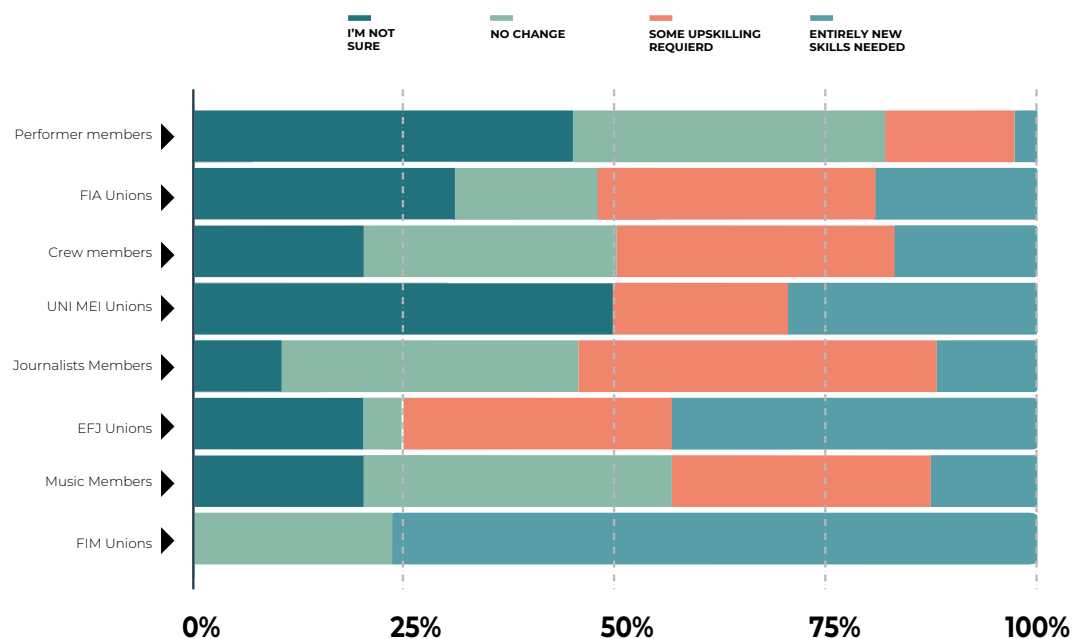


Across all four sectors, members and unions broadly assume that AI has not yet transformed daily workload, but unions perceive more change and uncertainty than their members. A majority of actors, crew, journalists and music professionals report “no significant change” (55–61%), while unions in each corresponding sector give notably lower “no change” scores (30–46%), suggesting they foresee more disruption than workers are currently perceiving. Members also show a clearer pattern of outcomes, especially among journalists and musicians, suggesting that where AI is already embedded in everyday tools (newsrooms, some music workflows), workers feel able to categorise its impact. By contrast, actors have a much larger “don’t know” group (27%), pointing to more diffuse and less visible workload effects in acting and voice work.

Differences between members also emerge in how they experience change in workload. Journalists are the only group where a substantial minority of 26% reports decreased workload, reflecting the strong role of AI in automating transcription and translation. Crew members show the highest share reporting increased workload (14%), slightly above music (9%), journalists (10%) and actors (6%), which can be explained with AI adding coordination and oversight tasks in already compressed production schedules. Actors and musicians sit in between, with 12% and 13% respectively reporting decreased workload.

Compared with the responses of members, unions in every sector perceive more complexity, more change, and less stability. Their “no significant change” scores are consistently lower (30–46%), and their “I don’t know” responses far higher, especially in journalism where unions score 48%, while only 3 % of the members respond with “I don’t know”. Unions for actors and musicians are also more likely than their members to see decreased workload (26% vs 12% for actors and 23% vs 13% for music). Taken together, the data suggest layers of difference. Across sectors journalists see the clearest efficiency gains, while crew addresses the most added tasks. Actors and musicians on the other hand are in general more uncertain than journalists and crew. Between members and unions, unions are reading the same signals as part of a still-unfolding pattern rather than a stable “no change” status quo.

## ● Skills needed

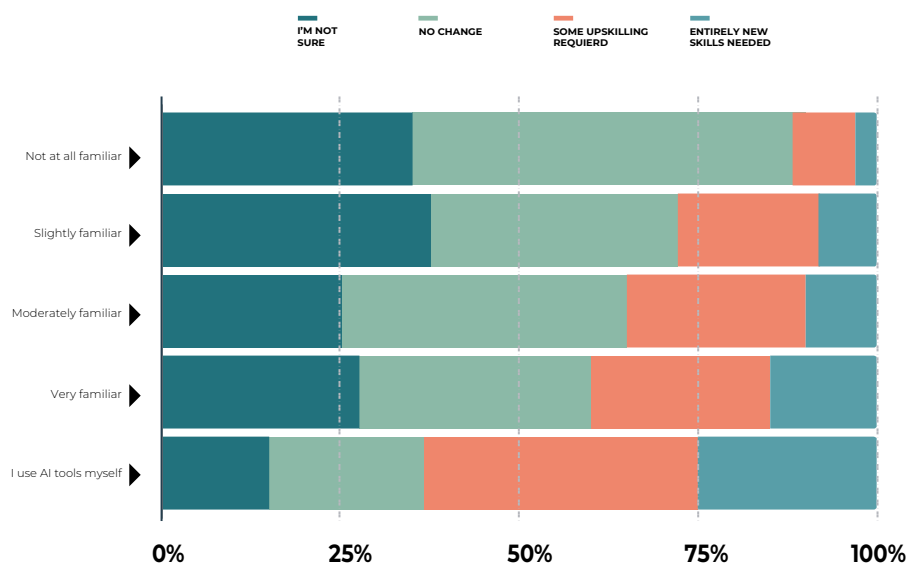


The survey data reveals a striking divergence between how union members and their representative organizations perceive the skill implications of AI. Across all categories (actors, crew, journalists, and music workers) unions consistently report higher rates of “some upskilling required” and “entirely new skills needed” compared to their own members. The gap is most pronounced among music workers: while 77% of FIM unions signal that some upskilling is required, only 27% of music members share that view. This suggests that unions may have a clearer strategic awareness of where AI is pushing the profession, while individual workers are still in an earlier stage of recognizing the full scope of change ahead.

The “no change” responses are telling in their own right. A substantial portion of members across all groups (ranging from 32% to 41%) report feeling no impact on their skills at all. This likely reflects a combination of factors: workers in roles where AI has not yet visibly penetrated day-to-day practice, a degree of normalisation where AI-assisted tools are absorbed without being recognized as such, or a genuine lag between technological adoption at the organizational level and felt experience on the ground. The 0% “no change” response from FIM unions stands in sharp contrast and underlines how differently institutions read the landscape compared to individuals.

An interesting co-relation was found between the measure in which respondents are “used” to AI tools and the perceived impact on skills. The data reveals a striking pattern: the more familiar respondents are with AI tools, the less likely they are to perceive their work as requiring no change at all. Among those with no AI experience (“not at all familiar”), over half (55%) report that no new skills are needed — a figure that likely reflects a blind spot rather than reassurance. Those unfamiliar with AI are, by definition, poorly positioned to assess what competencies it demands. Conversely, among respondents who use AI tools themselves, nearly 42% indicate that some upskilling is required, and 26% say entirely new skills will be needed. Familiarity with AI thus goes hand in hand with a sharper awareness of its impact on one’s own skill set.

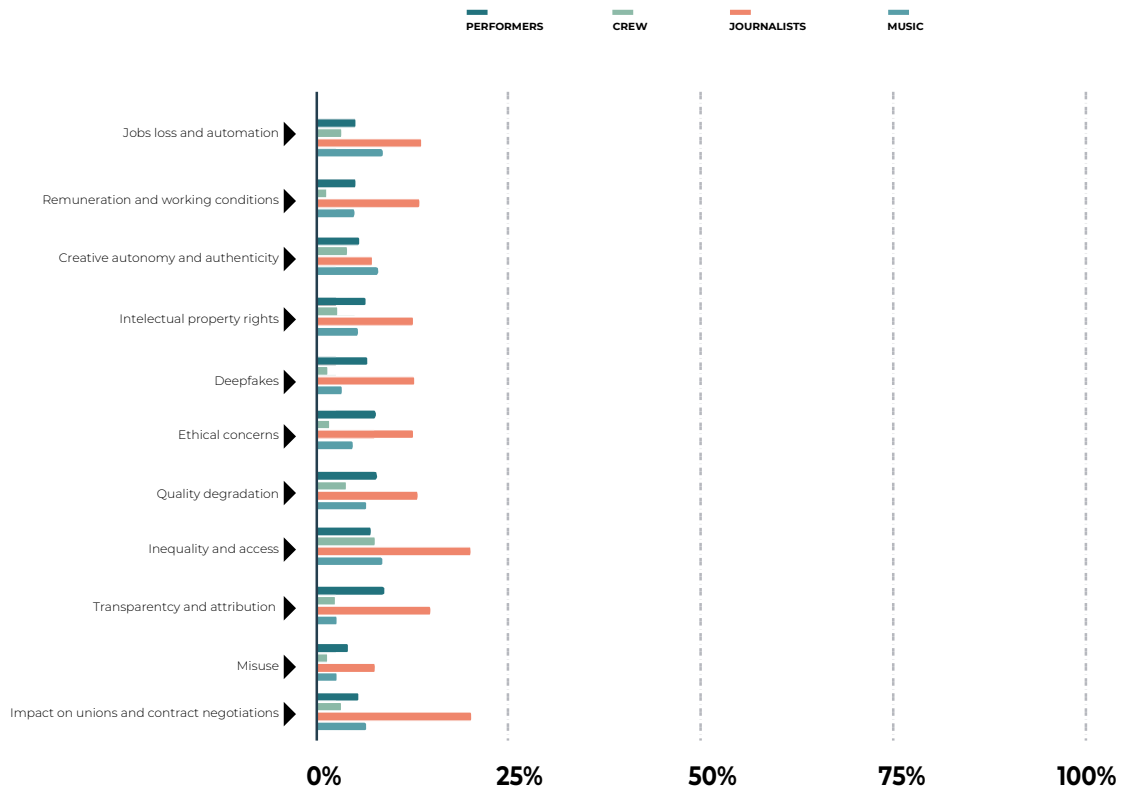
Also notable is the persistently high level of uncertainty (“I’m not sure”) across all groups including the most experienced ones. Even among respondents who use AI tools themselves, 9% remain uncertain about the impact on their skills, and in the “very familiar” group that figure rises to 27%.



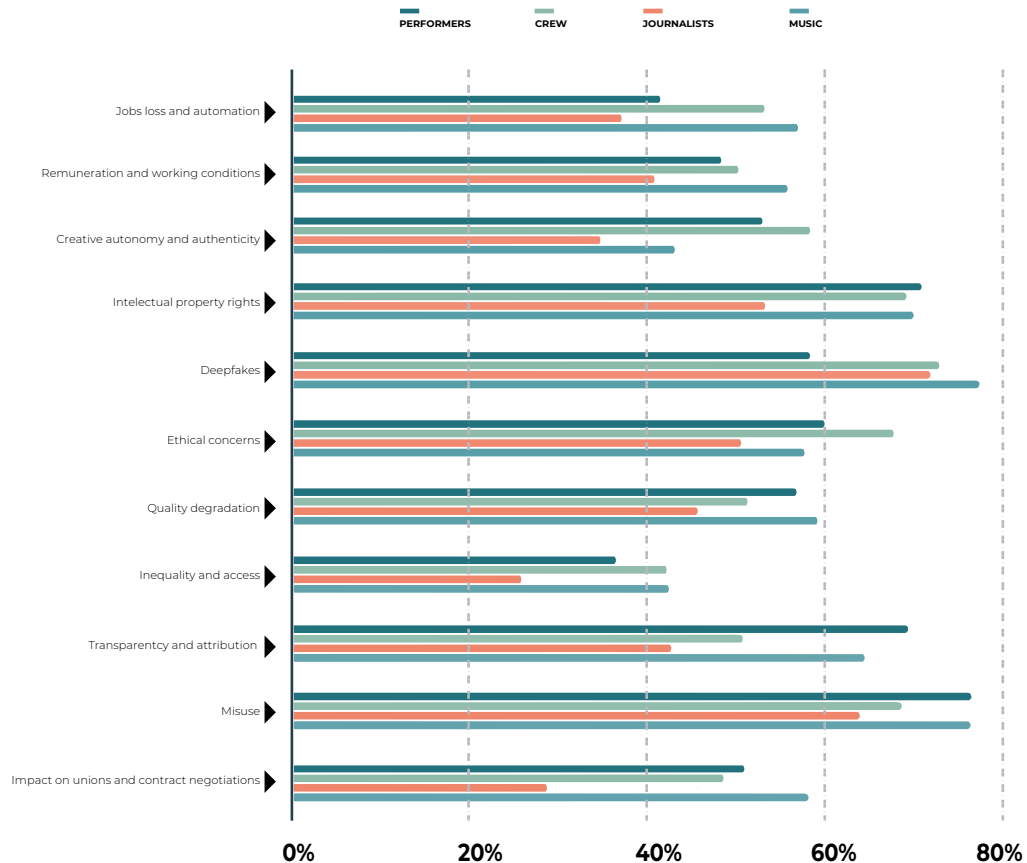
## ●●Concern

The most striking finding is how extremely low the percentage of “not at all concerned” responses is across the entire study. Across all sectors and respondent groups, the average sits below 6%, and among actors it reaches barely 1.63%. This is not a measurement of a problem, it is a near-complete consensus about its existence. The “very concerned” percentages are correspondingly high: an average of 61% among actors, 58% among crew members, and notably also 61% among FIM trade unions. The picture the data paints is therefore not of a divided field, but of a sector sounding the alarm across the board. The exceptions are all the more telling for it.

## NOT CONCERNED AT ALL



## VERY CONCERNED



Two trade unions deviate sharply from their respective memberships. The EFJ (journalists' unions) is markedly less concerned than Portuguese journalist members: on job loss, EFJ scores only 16% "very concerned" compared to 48% among members, a gap of over 32 percentage points. On creative autonomy the difference is 29 points, and on impact on union negotiations as much as 26 points. At the same time, EFJ sits at the top of "not at all concerned" on equality and access (16%) and impact on unions (16%), categories on which journalist members are considerably less relaxed. Warning: once again we must remember that the number of respondents in the journalist survey was dramatically low (36) so conclusions must be drawn carefully..

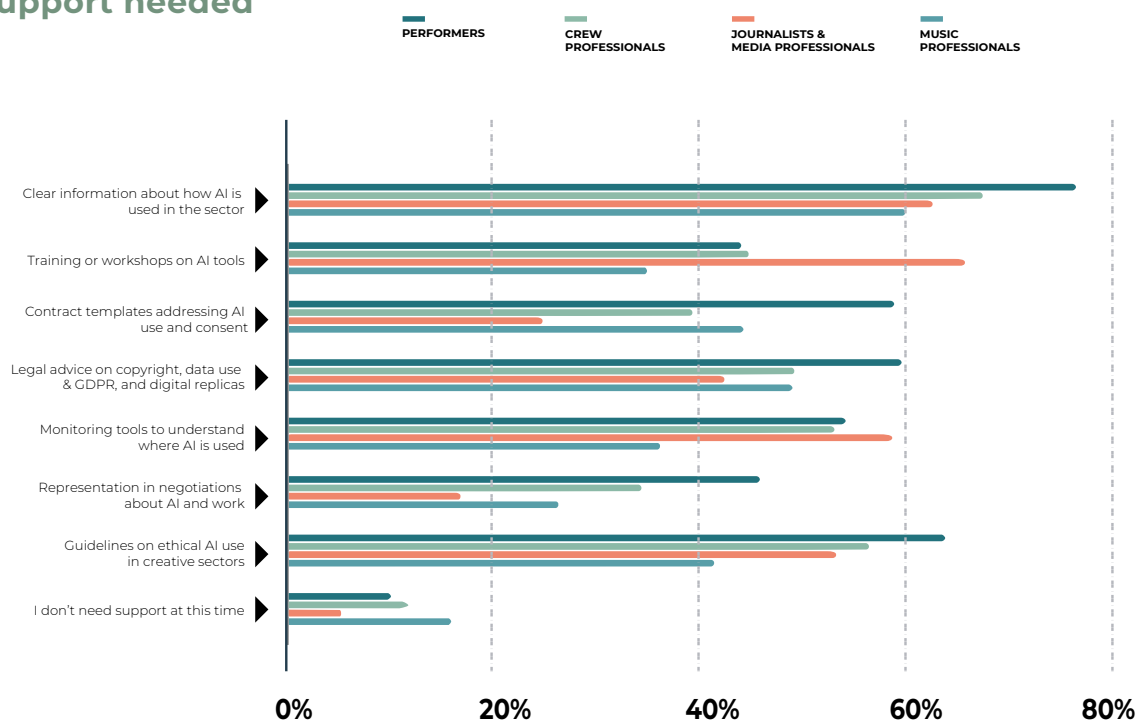
FIM (music unions) shows the inverse pattern: FIM unions are on average slightly more concerned than music members, but score strikingly lower on creative autonomy (23% vs 55%). The fact that music unions rate IP rights, misuse and deepfakes as highly as members do, yet almost disregard creative autonomy, suggests that FIM frames the struggle primarily in legal and contractual terms, while members also feel the artistic domain shifting.

Two unions stand out at the opposite end of the spectrum: UNI MEI and FIM score exactly 0% on "not at all concerned" across every single theme. This is not coincidental. It points to an institutional baseline of total alertness, or to a response dynamic in which union representatives cannot or will not allow themselves to say they are "not concerned." In contrast, EFJ unions record percentages of 8% or even 16% on multiple themes. That gap likely also reflects the profile of the respondents: EFJ represents sectors where AI is in some respects experienced as a useful tool, not solely as a threat.

One theme that is considered relatively "safe" across sectors is equality and access. From actors to journalists, from unions to members: "inequality and access" consistently scores the highest "not at all concerned" percentages and the lowest "very concerned" scores. That is itself an insight. Direct, personal threats (misuse of likeness, deepfakes, job loss) mobilise intense concern. The structural, societal question of who can make use of AI tools and who cannot recede into the background. The same tendency is visible with "impact on unions and collective bargaining": journalist members and EFJ unions score remarkably low on "very concerned" here, while FIM unions (69%) and UNI MEI (50%) rate this theme very highly. This suggests that the institutional reflex to place AI on the bargaining agenda differs substantially depending on union tradition and the extent to which collective bargaining is already an established practice in that sector.

Finally, the comparison between members and unions illustrates a pattern that deserves policy attention: in three of the four sector pairings, unions score on average lower on "very concerned" than their members. Only FIM marginally exceeds the member score.

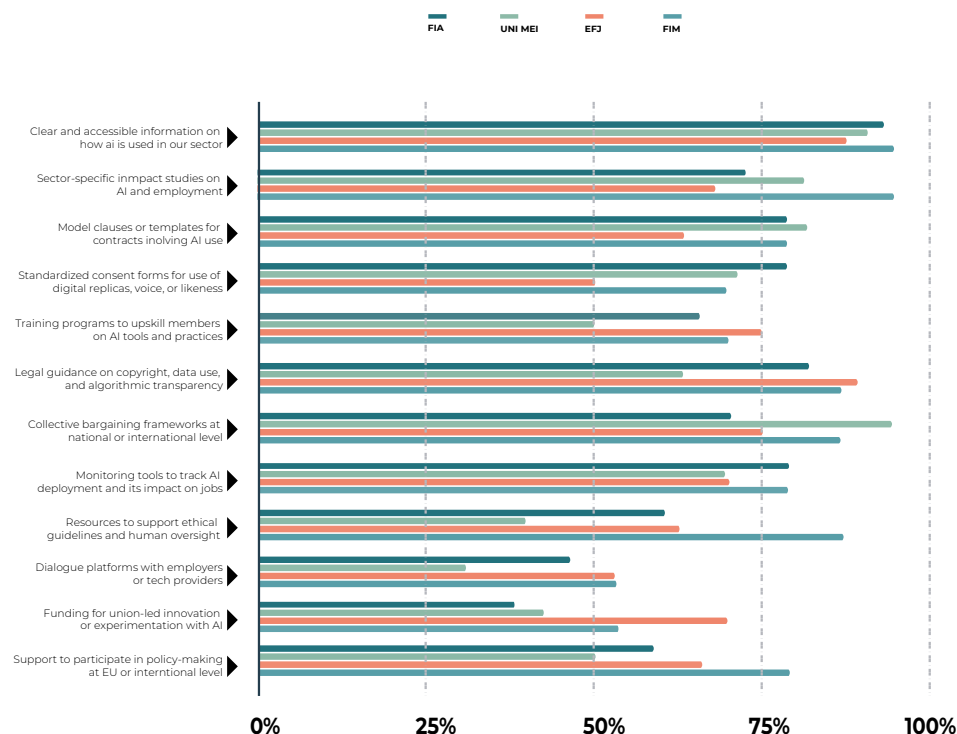
## Support needed



Across the different sectors most respondents want information, governance and ethics, but the intensity and emphasis differ by profession. Actors stand out as the most information seeking group with 77% asking for clear information about how AI is used and 64% for ethical guidelines, closely followed by crew (67% information, 58% guidelines) and journalists (61% and 55%), while music professionals are clearly lower on ethics (41%) despite similar demand for information (60%). This suggests a common sense of lack of transparency around AI deployment, but with actors and crew pushing harder for sector-wide norms than musicians, who appear more fragmented in how they see AI's ethical stakes.

A second key finding is that members ask for training and upskilling, as well as legal protection rather, than being left to navigate AI individually, though again with distinct sector profiles. Journalists are the clear outlier on training, since 65% want workshops on AI tools, far above actors and crew (both 43%) and music professionals (35%), which fits their position as high users who now need skills and standards to catch up with practice. Actors, by contrast, are the group demanding the most for clear legal frameworks and advice. 60% want legal advice on copyright, data use, GDPR and digital replicas and 59% want contract templates addressing AI use and consent, compared with lower but still substantial demand among crew (48% legal, 40% contracts), music professionals (48% legal, 44% contracts) and journalists (42% legal, 23% contracts). This points to actors focusing on formalising consent and rights around their likeness and recordings, while journalists prioritise learning to manage tools already embedded in their workflow.

Finally, there is clear appetite for collective governance of AI, but how that should happen differs by sector. Actors and crew combine a strong demand for monitoring (54% and 53%) with relatively high support for representation in negotiations about AI and work (44% and 33%), and only 9–10% say they need no support at this time. Journalists and music professionals lean more towards transparency and individual support than explicit bargaining, since 58% of journalists and 36% of music professionals want monitoring tools, but only 16% and 25% respectively prioritise representation in negotiations, and 6% of journalists versus 15% of music professionals say they need no support. Taken together, the data suggest a gradient from actors and crew, who see AI as something to be negotiated and constrained collectively, to journalists, who emphasise training and transparency in already AI-saturated environments, and music professionals, whose demands are more diffuse and less sharply concentrated on any single form of support.



Across the board, unions mirror and amplify members' call for information, governance and ethics, but at a higher and more structured level. While 60–77% of workers across sectors want clear information about how AI is used, unions are almost unanimously aligned on this. 90–92% of FIA, UNI MEI and FIM, and 87.5% of

EFJ, ask for clear and accessible AI information in their sector. They go further by demanding sector-specific impact studies on AI and employment (from 67% in EFJ to 92% in FIM) and monitoring tools to track AI deployment (70–77% across all federations), signalling that unions are thinking in terms of systematic evidence and ongoing monitoring rather than ad hoc transparency alone. Ethical governance is also framed more institutionally. Where 41–64% of members ask for ethical guidelines, 59–85% of unions want resources to support ethical guidelines and human oversight, often combined with dialogue platforms with employers and tech providers (30–54% across unions).

On contractual, consent and legal protections, unions confirm and deepen members' priorities but again with a more formal architecture. Members' demand for contract templates and legal advice is strongest among actors and music professionals, to which unions respond by placing very high emphasis on model clauses and consent tools. Between 77% and 80% of FIA, UNI MEI and FIM, and 63% of EFJ, want model clauses or templates for contracts involving AI use, while 69–77% in all federations want standardised consent forms for digital replicas, voice and likeness. Legal guidance is even more prominent. 82% (FIA), 60% (UNI MEI), 88% (EFJ) and 85% (FIM) want legal guidance on copyright, data use and algorithmic transparency, clearly exceeding the already high demand for legal support among members. Unions also look beyond individual contracts to structural tools, since 72–90% call for collective bargaining frameworks at national or international level, and 50–77% want support to participate in EU or international policy-making. This shows unions translating individual worries about consent and rights into a perceived strategy spanning contracts, sector agreements and regulatory influence.

Finally, unions' view of capacity-building, experimentation and representation is broader and more proactive than members' more immediate requests. Where members focus on training for day-to-day tools (with journalists peaking at 65%), unions in all federations see training programmes as one element of a wider infrastructure. A further 50–75% of unions' answers call for training to upskill members, but they also ask for funding for union-led innovation or experimentation with AI (30–71%) and dialogue platforms with employers or tech providers (30–54%). Monitoring tools, which 36–58% of members say they want, are demanded by 70–77% of unions, reflecting a stronger emphasis on systematic tracking of AI's job impact rather than case-by-case problem-solving. Overall members articulate concrete, immediate needs (information, training, contracts, legal advice), while unions articulate a more comprehensive governance ecosystem combining information, legal frameworks, collective bargaining, monitoring, ethics resources, dialogue and policy access, designed to turn their higher awareness into sector-wide rules rather than individual strategies.



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