



AI AND WORK

IN THE MEDIA, ARTS & ENTERTAINMENT SECTOR

PART 2/4
2026 SECTOR REPORT



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



This project and publication have received the support of the European Union. The publication reflects the views of the authors only and the European Commission cannot be held responsible for any use of the information contained therein.



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

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.

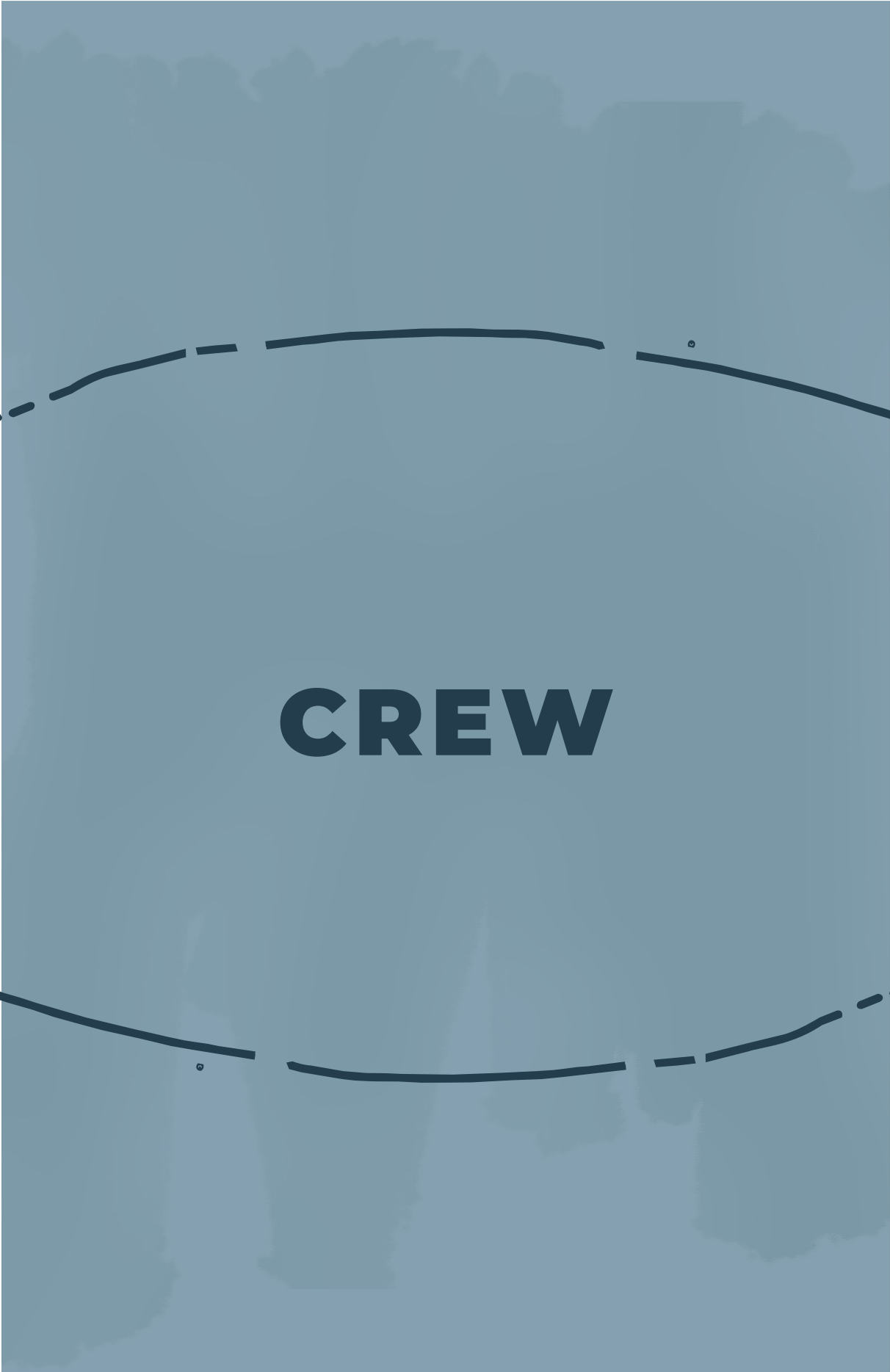
•• Participation

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.



CREW

ANALYSIS OF 295 FILM AND TV CREW IN BELGIUM & FRANCE

Respondents: 295 crew members of Belgian Union ACV Puls and French CGT union SPIAC

ACV PULS

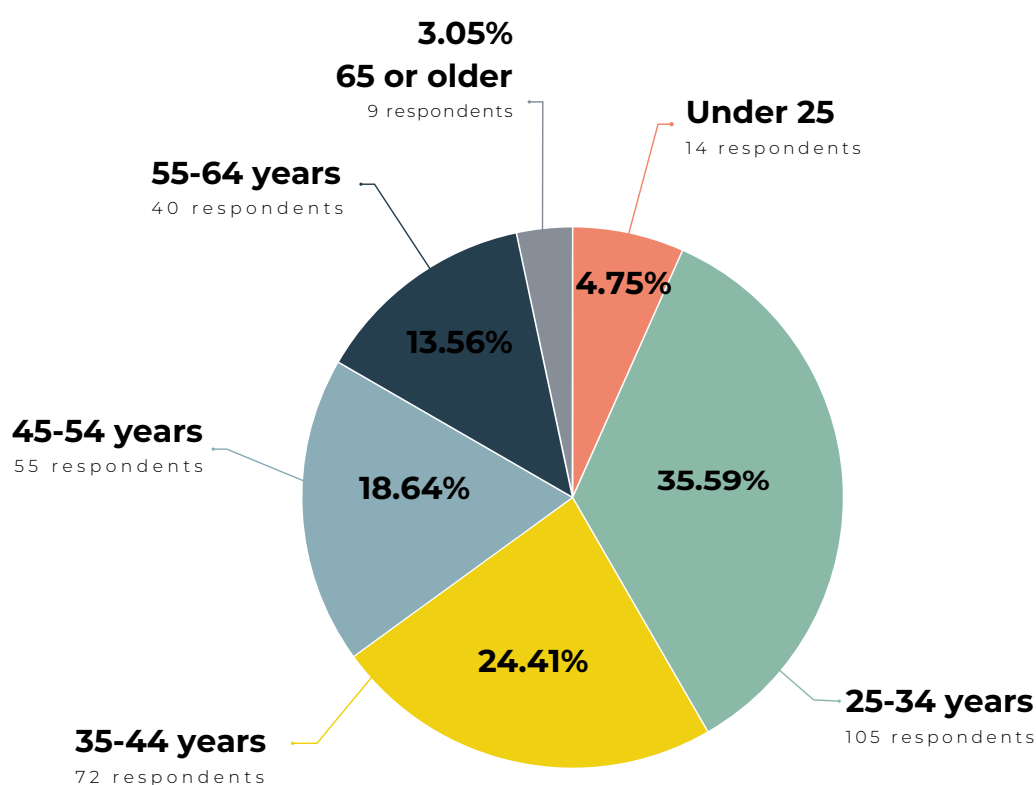
SPIAC

Geographical Focus: Belgium (BE-FR) & France

PROFILE

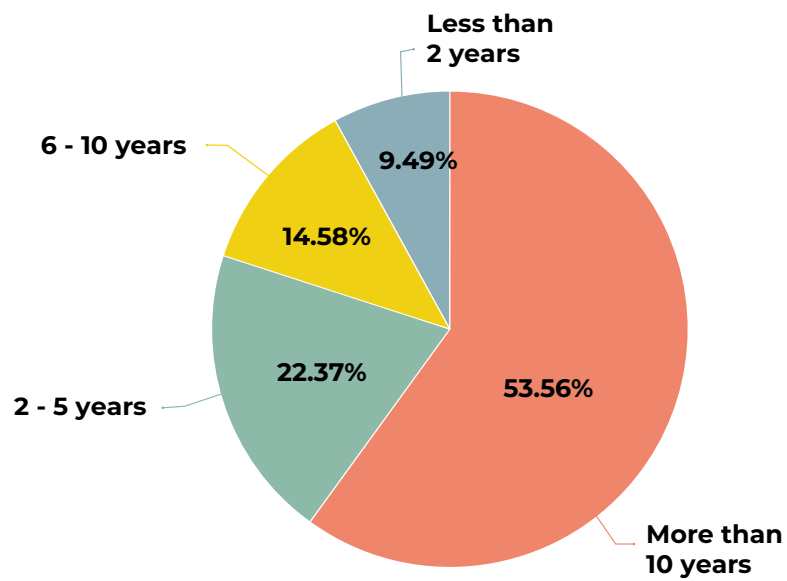
•• Age

Out of 295 crew member respondents, the largest age group is 25–34 (105; 35.59%). The next most represented cohort is 35–44 (72; 24.41%), meaning 25–44-year-olds make up 60.00% of the crew sample (177 people). A clear majority concentrated in the early-to-mid career range. Participation then declines with age: 45–54 accounts for 18.64% (55) and 55–64 for 13.56% (40), so 45–64 represents 32.20% (95) overall. Smaller shares appear at the ends of the spectrum, with under 25 at 4.75% (14) and 65 or older at 3.05% (9), indicating relatively limited representation from the youngest and oldest respondents in this group.



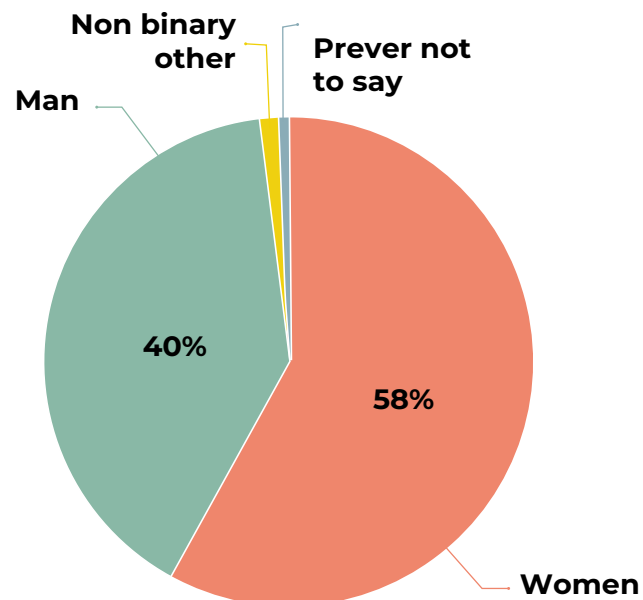
•• How many years of experience do you have in your profession?

Out of 295 crew member respondents, a majority report more than 10 years of professional experience (158; 53.56%), indicating that the crew sample is weighted toward established practitioners. The remaining respondents are spread across earlier career stages: 2–5 years accounts for 66 respondents (22.37%), 6–10 years for 43 (14.58%), and less than 2 years for 28 (9.49%). Overall, those with 6+ years of experience make up 68.14% of crew respondents (201 people), while those with 5 years or less represent 31.86% (94 people), showing a more mixed experience profile than the actor group, but still clearly leaning toward longer tenure.



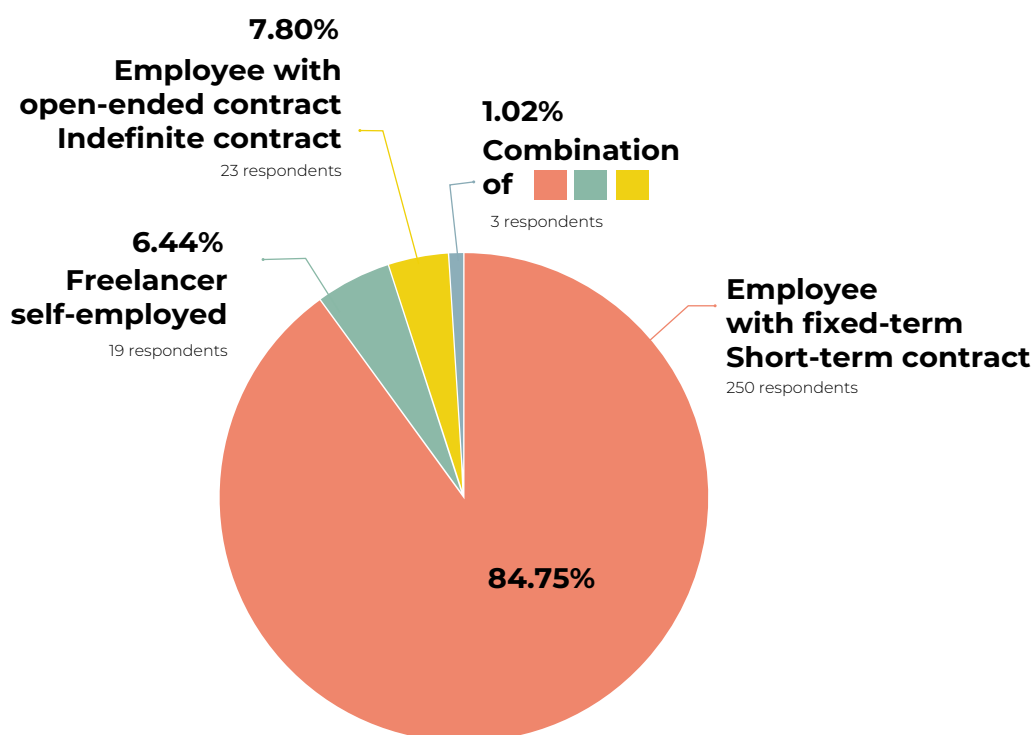
•• Gender

Out of 295 crew member respondents, women make up the majority with 171 respondents (57.97%), while men account for 118 (40.00%). A small share identify as non-binary (4; 1.36%) and 2 respondents preferred not to say (0.68%).



•• What are your usual work arrangements?

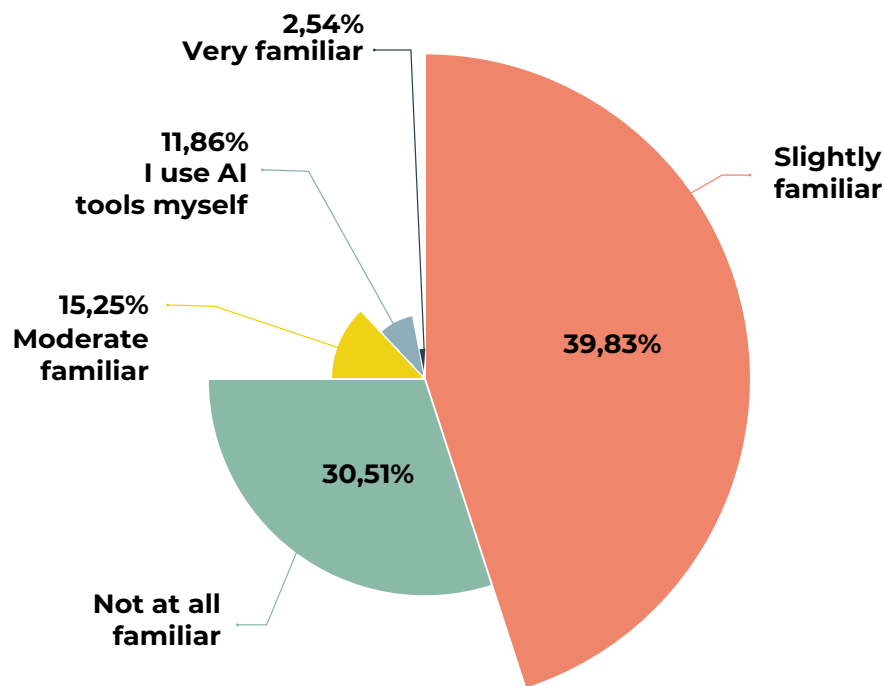
Out of 295 crew member respondents, the most common work arrangement by far is being an employee with a fixed-term / short-term contract (250; 84.75%). In contrast, relatively few report an open-ended / indefinite contract (23; 7.80%), and an even smaller share are freelancers / self-employed (19; 6.44%). Only 3 respondents report a combination of arrangements (1.02%). Taken together, 92.20% of crew respondents (273 people) are in employee roles (fixed-term or indefinite), indicating that (unlike actors) crew work in this sample is predominantly structured around employment contracts, albeit largely time-limited rather than permanent. This pattern likely reflects, at least in part, the survey's national coverage (France and Belgium), where specific labour-status regimes for cultural workers can make project-based work more commonly reported as fixed-term employment rather than freelance/solo self-employment (e.g., the French intermittence system and Belgium's arts worker framework)."



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

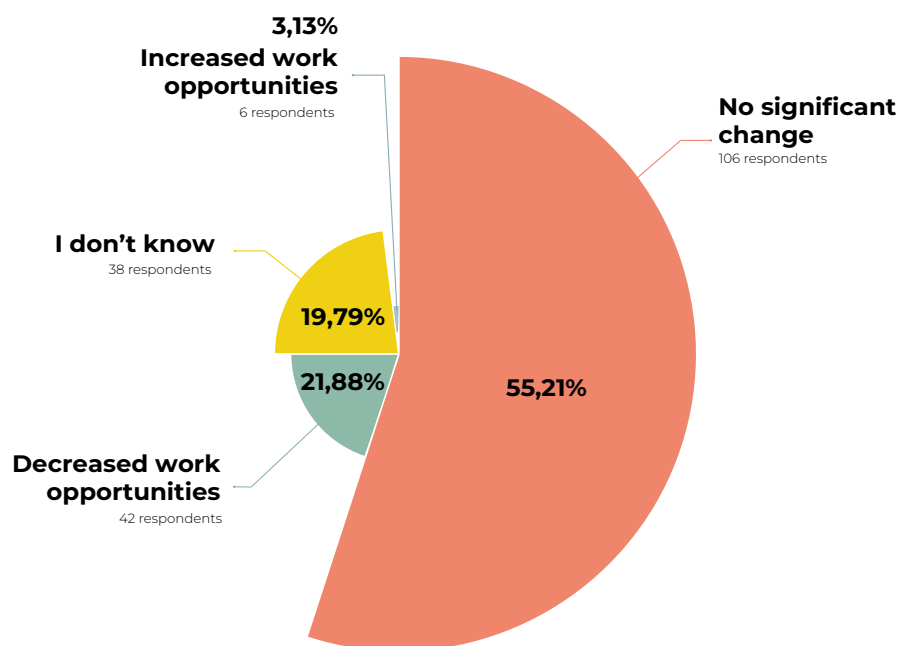
Out of 236 crew member respondents who answered this question, familiarity with AI in the work environment is generally limited. The largest group reports being slightly familiar (94; 39.83%), followed by not at all familiar (72; 30.51%) and moderately familiar (36; 15.25%). Taken together, these three categories account for 85.59% of responses (202 people), indicating that most crew members are not yet strongly acquainted with AI in their work context.

More advanced engagement remains a minority: 28 respondents say they use AI tools themselves (11.86%) and 6 report being very familiar (2.54%). Combined, 14.41% of crew respondents (34 people) indicate direct use or high familiarity. This is slightly higher than in the actor sample, suggesting that hands-on AI adoption may be somewhat more present among crew roles, even though overall familiarity remains largely low-to-moderate.



••Has AI affected your work opportunities?

Out of 192 crew member respondents who answered this question, the most common experience is no significant change in work opportunities (106; 55.21%). A smaller (but still meaningful) share reports negative effects, with 42 saying AI has decreased their work opportunities (21.88%). 38 respondents selected "I don't know" (19.79%), indicating lingering uncertainty for about one in five. Only 6 respondents report increased work opportunities (3.13%).



Overall, 25.00% of crew respondents (48 people) perceive a direct change in opportunities (increase or decrease), and this is overwhelmingly tilted toward decline: reported decreases outnumber increases by 7 to 1. The remaining 75.00% (144 people) either see no change or are unsure, suggesting that (so far) AI's impact on opportunities is either limited, unclear, or unevenly felt within crew roles.

The remarks strongly support the quantitative pattern that most crew respondents do not yet see a clear change in opportunities, but that a meaningful minority already reports decline, with very few clear gains. A large cluster describes no direct impact so far, often because AI is not yet central in their specific role or department: *"I have not had any experience of someone replacing my job with AI", "To this point I didn't notice any change", "I am a builder... the productions I work on have chosen to build at least part of the set in real life", and "The use of AI is not currently a required skill for film electricians. It is not a hiring factor."* Several also frame this as a *"not yet"* situation rather than long-term reassurance: *"For now, I'm not affected", "I don't think my job is affected yet. However, that could change in the coming years", and "For now, the arrival of the great replacement within 3 to 5 years... is still in the planning stages."*

Where negative effects are described, they are concentrated in advertising/digital work, voice-related services, and visual pre-production/design tasks, rather than evenly across all crew functions. Respondents mention reduced demand in dubbing and audio work (*"clients who came for e-learning or corporate work have decreased considerably due to AI-generated voices", "Almost no more voice recording/mixing for short digital ads", "Less need for a sound engineer"*), but also in graphics, storyboard, and set-related imagery (*"Example: an agency that replaces me for storyboard creation by Midjourney", "Many advertising shoots (especially packshots) have already been replaced by AI generating a video as a finished product"*). A recurring mechanism is not just replacement but task devaluation and time compression: *"Before, people would call on me for days of work; now they ask me to do it in a few hours", and "I'm no longer being asked to do subtitling... because 'I can ask GPT chat,' so we have to lower our rates to compete with AI."*

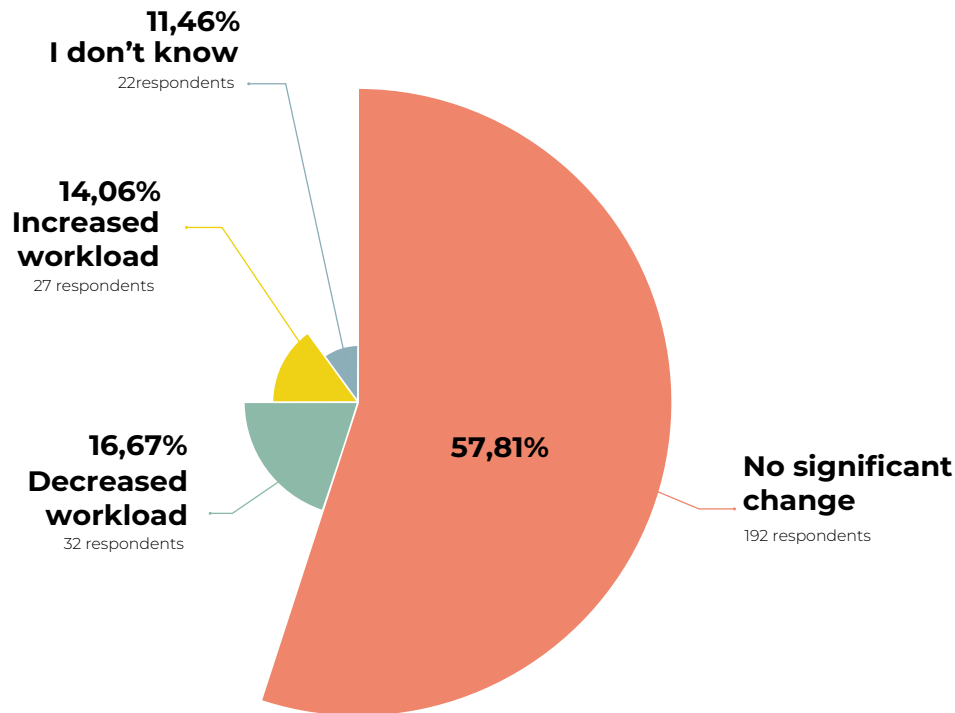
At the same time, several remarks complicate the story by separating AI effects from broader market and economic pressures. Some explicitly say current declines are not primarily due to AI (*"Filming activity is currently lower, but that's not due to AI. As far as I know"*), while others describe AI as one factor among many, including investment shifts and weak labour-market conditions for juniors: *"As a junior, the job market for young creatives is catastrophic... Employers prefer to use AI rather than hire young people", and "the lack of work... has been exacerbated more by the political and economic context than by the arrival of AI itself."* This helps explain why many respondents remain in the *"no change"* or *"I don't know"* categories even while expressing strong concerns about future opportunity loss.

Positive opportunity effects do appear, but they are rare and usually role-specific. A few respondents report that AI has expanded the scope of projects they can take on rather than replacing them: one explains that some requests are now *"AI-powered, rather than requiring Photoshop"*, and that they have also been able to work on advertising projects they *"simply wouldn't have been able to do before (generating animated sequences from images)."* Others frame AI proficiency as an employability advantage: *"Proficiency in AI is an additional asset to my profile"*; or emphasise constant training to stay relevant (*"Many AI projects are emerging, and I am constantly training to stay up-to-date"*). Overall, however, the remarks reinforce the quantitative finding that opportunity effects are currently uneven and role-dependent, with reported declines significantly outweighing gains.

•• Has AI affected your workload?

Out of 192 crew member respondents who answered this question, a majority report no significant change in workload (57.81%). Among those who do perceive a change, the direction is mixed but leans slightly towards reduction: 32 respondents say AI has decreased their workload (16.67%), while 27 report an increased workload (14.06%). A further 22 selected "I don't know" (11.46%), suggesting a smaller but still notable level of uncertainty.

Overall, 30.73% of crew respondents (59 people) report a direct workload change (increase or decrease), while 69.27% (133 people) report stability or uncertainty. Where change is reported, decreases only modestly exceed increases (by 5 respondents), pointing to a more split experience of AI's effect on workload among crew members.



The workload remarks align closely with these quantitative results showing a more split experience than in opportunities: many crew respondents report no change, but among those who do report change, both decreases and increases are common. A first cluster explains the **“no change”** responses through limited adoption or role distance: *“I am not currently personally involved in the use of AI tools in my department”, “I don’t use digital tools in my daily work life, so it doesn’t change my workload”, “I haven’t felt any changes on set in the last two years that would be related to the use of AI”, and “My job is not impacted at the moment.”* This is consistent with the large share reporting stability.

Where respondents do report workload reductions, these are mostly in transcription, translation, admin, research, and repetitive post-production support. Crew members describe significant efficiencies: *“AI saves me a lot of time on office and purely administrative tasks. This frees up my time for more creative and intellectual tasks”, “I save some research time on my edits thanks to AI”, and “Transcription is a really quick and important tool in documentary film editing.”* Some remarks are particularly clear about the practical value of AI in multilingual editing workflows: one editor explains that AI transcription and translation that once required **“several weeks”** can now be done in minutes, while still stressing that a human translator remains **“crucial for a perfect translation at the end of the filmmaking process.”** Others point to specific post-production gains, such as removing visible spotlights in frame: *“AI in post-production allowed us to remove spotlights... We would have had more work if we had to hide them.”*

At the same time, a large and very consistent cluster shows why workload also increases for many respondents: AI often creates extra correction, verification, and expectation management, rather than simple relief. Multiple comments challenge the idea that AI is a **“magic wand”**: *“AI image generation is really random... it is sometimes longer to create an image than searching one in a database”, and “Contrary to popular belief, an AI-generated image isn’t created with just a single prompt...”* In post and editing, transcription/subtitling tools are described as useful but error-prone: *“everything needs to be reviewed and corrected”, “AI-generated transcripts and subtitles require additional work in terms of proofreading, corrections, and interpretations”, and “Use of automatic translation/subtitling software... with completely wrong subtitles, therefore more time wasted redoing everything by hand.”* This **“time saved vs time spent correcting”** dynamic appears repeatedly and directly explains the mixed workload outcomes in the data.

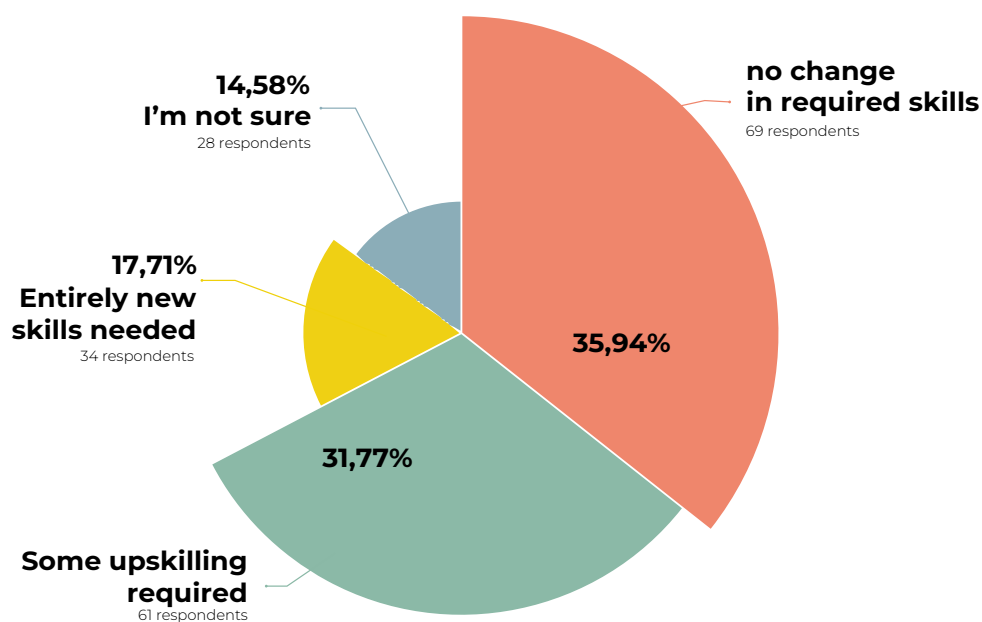
A fourth cluster highlights workload intensification through role compression and unrealistic scheduling, especially in design and production support. Respondents describe AI as increasing demands without

increasing time or staff: *“we hire one less graphic designer, and the workload is shifted onto the designer in charge of the project for a shorter period”*, *“the attractive possibilities offered by AI increase the diversity of demands and requirements without requiring more working time”*, and *“Production managers and set designers are increasingly turning to AI, but they’re forgetting to factor this extra work time into the production schedule.”* Several remarks also point to psychological strain and professional anxiety as part of workload: *“Competition with AI, increased stress, increased workload and speed under threat of being replaced”*, *“Fear for those around us: VFX, subtitling, translation...”*, and even *“50% decrease in revenue since the democratization of generative AI (2023).”* Overall, the remarks strongly support the quantitative finding that crew experiences are divided: AI can reduce workload in some tasks, but it can also increase workload through correction work, faster expectations, role compression, and stress.

•• How has AI changed the skills needed in your job?

Out of 192 crew member respondents who answered this question, the largest share reports no change in required skills (69; 35.94%), but a comparable proportion already see clear skills impacts. The sample reports that 61 say some upskilling is required (31.77%) and 34 report that entirely new skills are needed (17.71%). Only 28 respondents selected “I’m not sure” (14.58%), indicating relatively less uncertainty than among actors.

Grouped together, those who perceive any skills change (upskilling or entirely new skills) account for 49.48% of the crew sample (95 people) while 50.52% (97 people) either see no change or remain uncertain. This suggests that, for crew roles, AI is more often associated with tangible shifts in skill requirements, even if the direction and scale of change vary across respondents.



The remarks strongly reinforce this quantitative finding that, compared with actors, crew members more often perceive tangible skill shifts. The dominant theme is straightforward and repeated across roles: new tools require learning. Many respondents state this explicitly: *“We need to learn how to use the new tools”*, *“Software using artificial intelligence requires learning how to use it”*, *“Using AI is a skill that can be learned; it should be viewed as continuous training”*, and *“We need to train ourselves on the new tools.”* This is especially visible in post-production, editing, and graphics, where AI functions are increasingly integrated into existing software environments.

At the same time, the remarks make clear that this shift is highly uneven by department. Many manual, on-set, or craft-specific roles still report little or no direct impact: *“As a seamstress and dresser, AI does not affect my manual skills as an executor”*, *“To date, AI has had virtually no impact on camera work on set”*,

"As a boom operator, AI currently has no direct impact on my job", and "Hello. My job as a film electrician... AI hasn't yet become widespread in these areas." This supports the near-even split in our quantitative data: skill change is real and widespread in some crew functions, but not yet universal across all craft roles.

Where skills are changing most clearly, the remarks point to graphics, set design, art departments, editing, and post-production, where AI is not only a tool but increasingly an employer expectation. Graphic and set-design respondents describe direct pressure to adopt AI workflows: *"They expect you to master the AI", "I needed to learn fast some AI tools to keep up", "During the hiring process, set designers ask us if we are proficient in using AI to generate images... We therefore need to master a workflow comprised of several applications", and "The briefs and storyboards are now done by AI and it is necessary to be able to offer an equivalent."* Several also stress the hidden cost of upskilling, including personal subscriptions and unpaid training time: *"To train ourselves on these new tools at home outside of work hours, we have to pay exorbitant amounts for subscriptions out of our own pockets."* In editing and post, respondents emphasise learning AI-assisted transcription, translation, phrase search, and integrated tools in Avid/DaVinci/Adobe, often as part of normal software evolution: *"Editing software is increasingly integrating AI tools, and this will require training to understand and master them."*

A crucial nuance in the remarks is that *"new skills"* do not only mean operating AI tools; they also mean critical judgment, verification, and quality control. Several respondents reject the idea that AI reduces expertise: *"The required skills remain the same, but we must double-check the conformity of the information received by AI!"* Others describe needing to learn not just prompts but tool selection and framing: *"How to know which AI tool will be best suited to the job", "Learning the prompt, the tools", and "AI training: tools, their uses, potential pitfalls, and user framing within the company"*. This is often coupled with concern about declining standards and standardisation: *"Art direction is becoming standardized. Styles are becoming uniform", and "there's not enough oversight or quality control regarding the final product (distorted faces, hands with six fingers, etc.)."*

Finally, a strong undercurrent of the remarks frames AI-related skills as bound up with speed pressure, replacement risk, and loss of professional identity, not just technical adaptation. Respondents describe being expected to deliver faster because *"AI gives this impression of speed/efficiency"*, being pushed into broader tasks because *"Clients expect me to do all kind of graphic jobs... They believe AI is a all-powered and magic tool"*, and, in some cases, direct labour consequences: *"I lost my job because I refused to use AI instead of doing what I was hired and trained to do", "We are being replaced by AI by clients or production agencies", and "Some 'AI artists' are starting to emerge without training... replacing the work of real artists."* At the same time, some respondents still position AI as useful when kept under human control. For example, in audio: cleaning, transcription, mask tracking, or export upscaling, suggesting that the skill shift in crew work is not simply *"use AI or don't"*, but increasingly about knowing where AI helps, where it fails, and how to maintain professional standards under pressure.

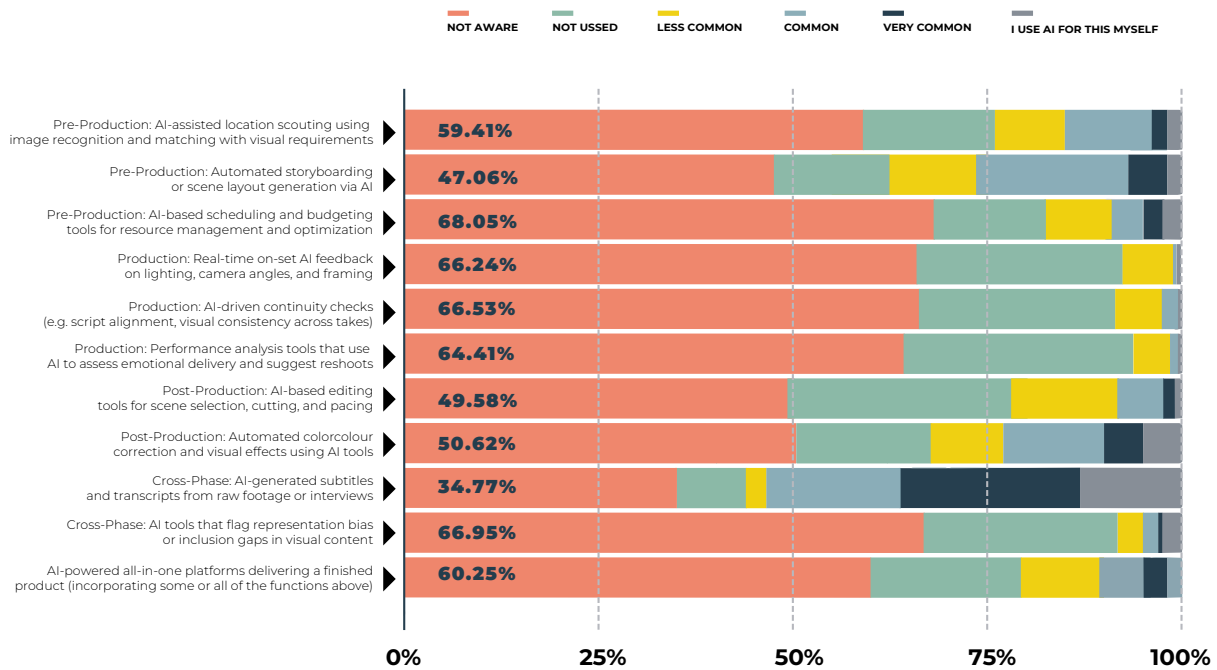
AI Awareness:

Across all listed applications, a majority of crew respondents either do not know these AI tools or report that they are not used. On average, 57.6% indicate they are not aware of a given application and 20.8% say it is not used, while 11.1% describe it as common or very common and 2.7% report that they use AI for it themselves.

Most of the AI tools are perceived as "not aware" or "not used". Only AI-generated subtitles are considered "normal". For AI-driven continuity checks, AI tools that flag representation bias, Real-time on-set AI feedback and Performance analysis tools, 92%-94% are convinced that they are not used or are unaware of those tools being used in the sector.

The reported self-use of AI is very low in this sector. For most tools there's max 2% reported use. The only exception is AI-generated subtitles and transcripts. 12.8% of respondents use AI for it and 40% think it is common or even very common.

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 widespread the awareness of certain tools is in the sector.



	USE	NOT AWARE
Pre-Production: AI-assisted location scouting using image recognition and matching with visual requirements	14.64%	59.41%
Pre-Production: Automated storyboarding or scene layout generation via AI	26.05%	47.06%
Pre-Production: AI-based scheduling and budgeting tools for resource management and optimization	8.71%	68.05%
Production: Real-time on-set AI feedback on lighting, camera angles, and framing	0.84%	66.24%
Production: AI-driven continuity checks (e.g. script alignment, visual consistency across takes)	2.12%	66.53%
Production: Performance analysis tools that use AI to assess emotional delivery and suggest reshoots	1.27%	64.41%
Post-Production: AI-based editing tools for scene selection, cutting, and pacing	7.98%	49.58%
Post-Production: Automated colour correction and visual effects using AI tools	23.24%	50.62%
Cross-Phase: AI-generated subtitles and transcripts from raw footage or interviews	53.13%	34.77%
Cross-Phase: AI tools that flag representation bias or inclusion gaps in visual content	4.60%	66.95%
AI-powered all-in-one platforms delivering a finished product (incorporating some or all of the functions above)	10.46%	60.25%

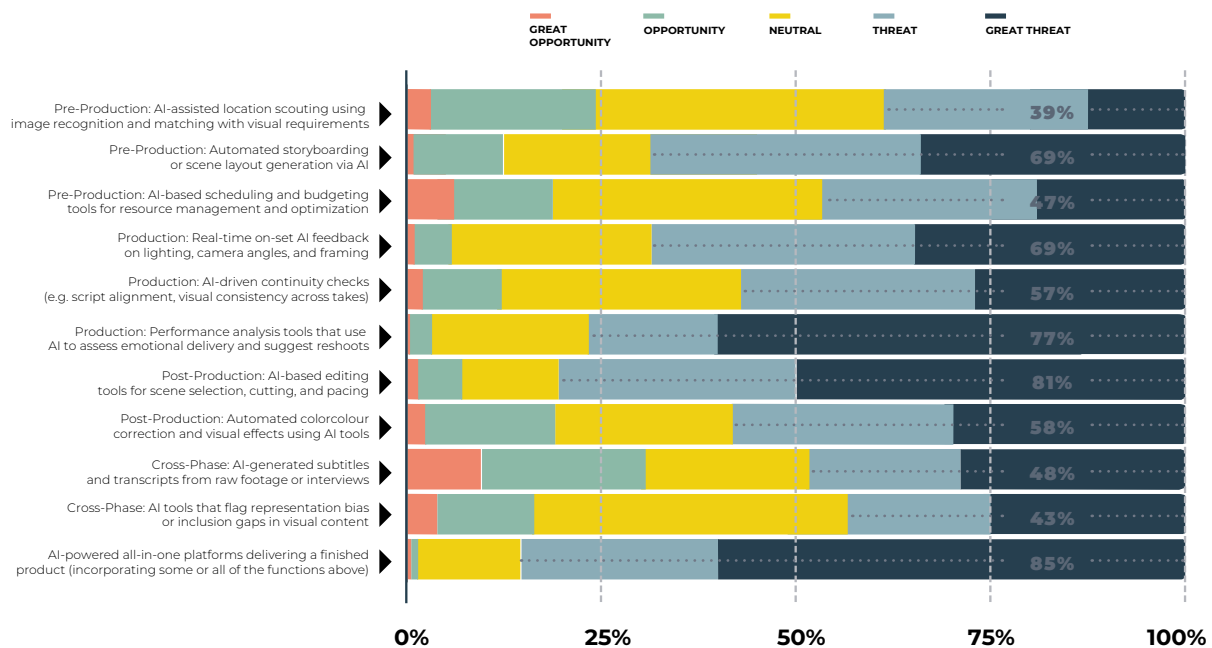
Crew has one unmistakable “visibility anchor”: subtitles/transcripts. It’s the only item where a clear majority reports use (53.1%) and the only one with “not aware” below 35%. This mirrors what we see in other sectors: language/transcription is the most recognisable AI layer because it’s tangible, frequent, and often integrated into everyday tools.

Automated storyboarding (26%) has also a relatively high use in pre-production, impacting storyboard artists and pre-vis professionals. The same goes for Colour correction and VFX (23.2%) AI tools like DaVinci Resolve and Adobe Sensei are already mainstream in post-production. But these applications also have a relatively high “Not Aware” response.

These are meaningful signals: either these tools are not widely deployed, or they are used in ways that aren’t visible to most respondents and therefore aren’t recognised as AI.

Of all members in the different sectors we surveyed, crew members had the highest average percentage of “unaware” answers (57.62%) and in the meantime the largest difference between union and member score (average “unaware” score for unions was 23.64%).

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).

	OPPORTUNITY	NEUTRAL	THREAT
Pre-Production: AI-assisted location scouting using image recognition and matching with visual requirements	24%	37%	39%
Pre-Production: Automated storyboarding or scene layout generation via AI	13%	19%	69%
Pre-Production: AI-based scheduling and budgeting tools for resource management and optimization	19%	34%	47%

Production: Real-time on-set AI feedback on lighting, camera angles, and framing	6%	26%	69%
Production: AI-driven continuity checks (e.g. script alignment, visual consistency across takes)	12%	31%	57%
Production: Performance analysis tools that use AI to assess emotional delivery and suggest reshoots	3%	20%	77%
Post-Production: AI-based editing tools for scene selection, cutting, and pacing	7%	13%	81%
Post-Production: Automated colour correction and visual effects using AI tools	19%	22%	58%
Cross-Phase: AI-generated subtitles and transcripts from raw footage or interviews	31%	21%	48%
Cross-Phase: AI tools that flag representation bias or inclusion gaps in visual content	16%	41%	43%
AI-powered all-in-one platforms delivering a finished product (incorporating some or all of the functions above)	2%	14%	85%

Crew perceptions are dominated by a concern about automation at key craft and decision points. The strongest threat signal in the entire crew set is “all-in-one platforms”, which is perceived as threatening by 85% while barely registering opportunity (2%). This reads as a very direct fear of end-to-end replacement, rather than partial augmentation.

A similar replacement logic appears around decision-heavy, labour-defining tasks. Post-production editing for selection/cutting/pacing is highly threatening (81%), and performance analysis tools that suggest reshoots are nearly as high (77%). These results imply that crew are especially sensitive to AI that claims to judge, select, or optimise creative/technical choices that traditionally justify specialist roles.

There is still a meaningful contrast within crew: applications framed as support rather than substitution look less extreme. Location scouting and scheduling/budgeting hold noticeably higher opportunity shares (24% and 19% respectively) and lower threat than the replacement-leaning items. Even subtitles/transcripts are less polarising than the all-in-one/editing cluster, although still threat-leaning (48% threat vs 31% opportunity), which suggests that in crew the “language layer” is not automatically seen as harmless or the sector that has already become used to the use of AI.

Crew perceptions resemble animation more than any other sector in the sense that the strongest fears cluster around role compression and workflow replacement, especially when AI claims to make end-to-end or judgement-heavy decisions. “All-in-one platforms” being viewed as a threat by 85% mirrors animation’s 86.3% and 75% with music professionals, showing a shared cross-sector anxiety about integrated systems that can absorb multiple job functions.

Concerns

	CONCERNED	NEUTRAL	NOT CONCERNED
Job loss and automation	71%	14%	16%
Remuneration and working conditions	74%	14%	11%
Creative autonomy and authenticity	78%	12%	10%
Intellectual property rights	84%	6%	9%
Deepfakes and misinformation	91%	5%	4%
Ethical concerns around digital actors	90%	5%	5%
Quality degradation in storytelling	84%	7%	9%
Inequality and access	52%	21%	27%
Transparency and credit	80%	11%	9%
Misuse of AI-generated content	89%	7%	4%
Impact on unions and contract negotiations	73%	14%	13%

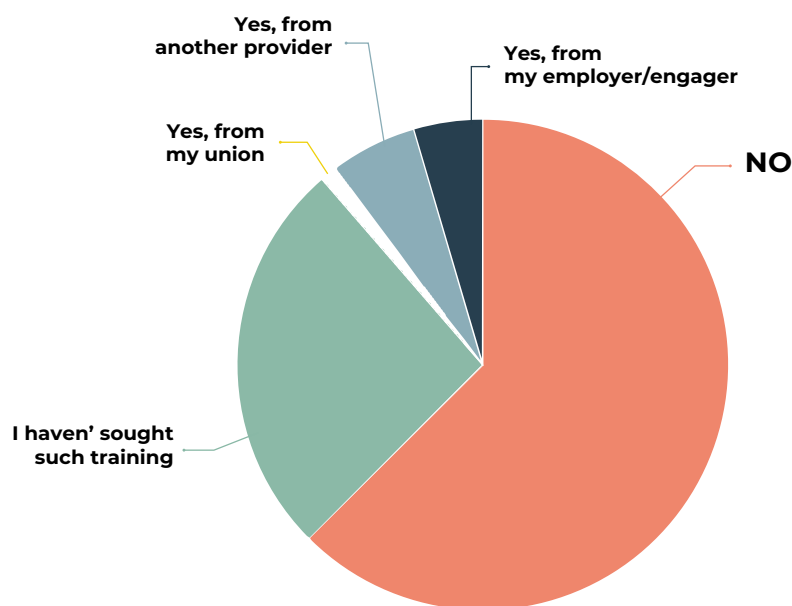
Crew concerns are structurally “system-level”: they are very high on misuse (89%), deepfakes/misinformation (91%), and digital-actor ethics (90%), but they are also high on quality in storytelling and IP (84%). Across most issues, crew members’ concerns broadly mirror those of other groups, especially around deepfakes, misuse, and core labour risks. They are highly likely to be very concerned about deepfakes and misuse, and their levels of concern about job loss, remuneration, working conditions and intellectual property rights sit in the same band as actors, animation, music and journalists. In that sense, crew clearly share the general sense that AI poses serious threats to job security, creative control, and rights.

At the same time, crew members stand out in a few important ways. They show particularly strong concern about ethical issues and the broader misuse of AI, scoring higher on ethics than most other member groups, which reflects their proximity to the technical and visual side of production. By contrast, they are less often very concerned about inequality and access, and somewhat less focused on transparency and attribution than actors and some other groups. This combination suggests that crew tend to frame AI risks primarily in terms of ethical practice on set and in workflows, rather than in terms of distributive questions or credit and visibility.

Training & support

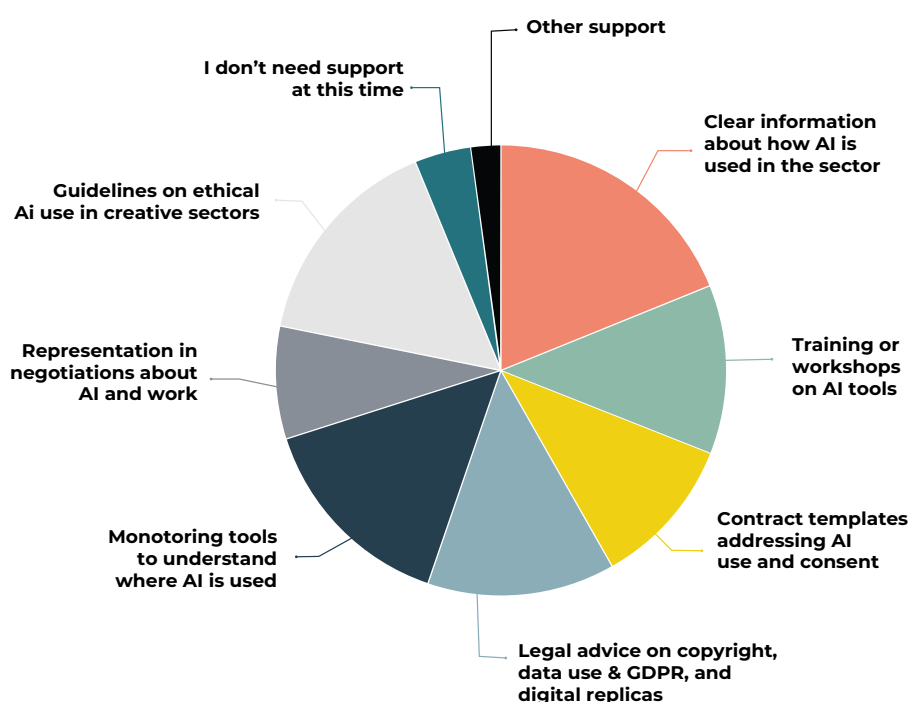
••AI training

The vast majority of crew members has not received any training related to AI (53%) and almost 20% wasn't looking for such training either. Only a very small percentage has received training: 5 respondents reported that their employer provided training and 12 respondents (4%) said “another provider” did this.



••Support wanted

Similar to other sectors, crew members also ask most for “clear information” to help them cope with the impact of AI on their work. Next in line is guidelines on the ethical use of AI in creative sectors. Only 10% says they don't need support at this time.



Crew professionals use the “*other support*” field to push for much stronger limits and clearer rules around AI, often in uncompromising terms. Several respondents insist that “*there is no ethical use of generative AI*” and call for hard legal constraints: “*I want laws to limit access to AI so I can feel safe at work.*” Others link this directly to copyright and labour law, demanding “*a legislative framework for the use of generative AI in accordance with copyright law*” and even going as far as “*ban AI. Thanks.*” They do not just ask for guidance; they want enforceable protections and clear boundaries, including “*limitations on AI based on ethical, sociological, ecological and cultural issues.*”

Alongside this call for regulation, some answers highlight confusion, opacity and the uneven way AI is handled in practice. One respondent notes that ***“each production company has a different stance regarding AI usage rights”***, with some allowing AI freely, others banning generative AI for rights reasons, and a few even prohibiting AI altogether ***“(even though our software is riddled with it!).”*** For them, the real danger lies in ***“this lack of understanding”*** and in treating AI as only generative tools, when ***“AI isn’t just generative AI; we can’t take such a rigid position.”*** Another respondent offers a detailed technical critique of current models, pointing out that AI systems ***“provided primarily by Chinese teams under the Apache 2.0 license... are completely opaque regarding the data on which they were trained”*** and suggesting that this ***“technicality raises questions about copyright management in the future.”***

Several comments also stress representation and visibility, especially for roles that feel overlooked in AI debates. A graphic designer for the audiovisual industry writes: ***“I’ve noticed that you haven’t taken our work into account, which is quite surprising since we’re at the very heart of this AI demand, right down to post-production.”*** They point to everyday practices like ***“the manipulation of actors’ images that we do daily”*** and ***“the need to search for images to populate a set”*** and explicitly ask researchers to ***“include us more in your questionnaire if that’s still possible.”*** Others look for collective strategies to respond to automation, asking ***“how to structure ourselves to regain control over the production tool and thus avoid job losses linked to productivity gains related to AI.”***

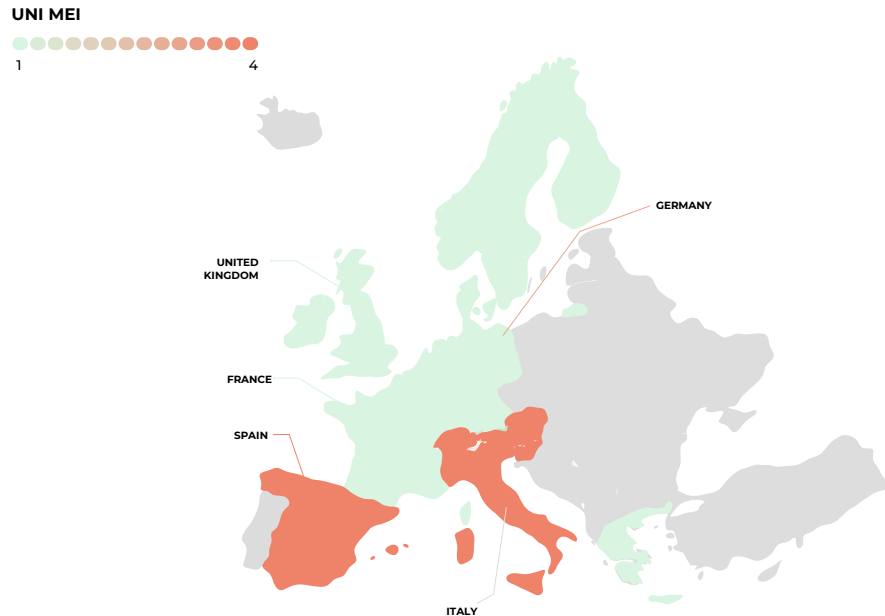
Finally, a number of crew frame AI as an attack on the core of creative work and on self-worth. One answer calls for ***“widespread awareness that AI’s novel approach to automating work is that it aims to replace us in the most exciting task: creation”*** and concludes: ***“The fact that we find this idea acceptable demonstrates humanity’s lack of self-esteem”***. Another respondent connects this to broader debates and ongoing discussions in the field, noting that ***“there are quite a few meetings and debates on this subject in the editing industry.”***



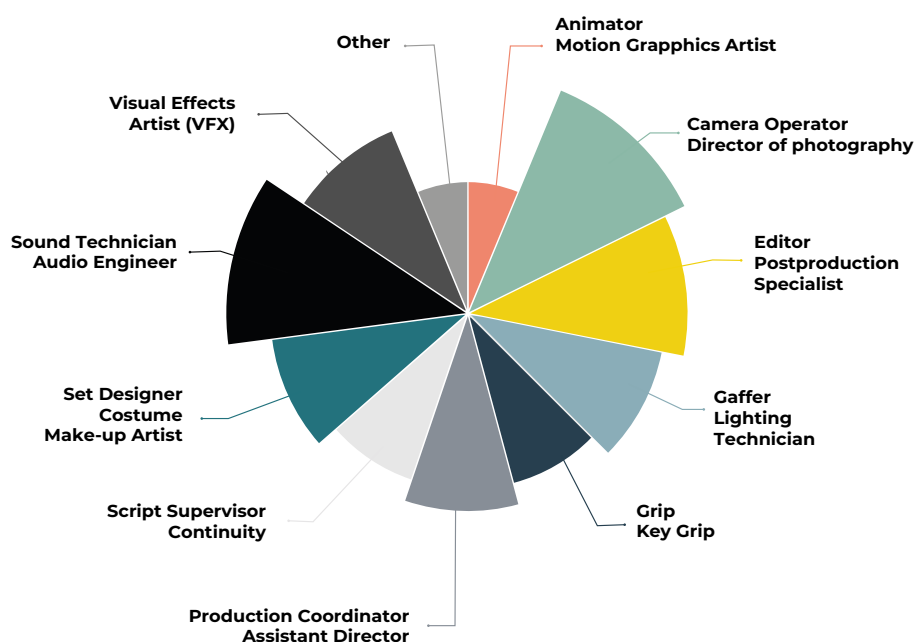
UNI MEI UNIONS

Profile of the Unions: Who represents the actors?

The unions representing crew who responded to the unions' survey are drawn from a range of European countries, with participation from the United Kingdom, Italy, Belgium, France, Sweden, Greece, Spain, Ireland, Austria, and Germany.



Across these countries, unions mainly represent technical and production-side roles in audiovisual work. The largest groups are camera operators/Directors of Photography and sound technicians/audio engineers (11 each), followed by editors/post-production specialists (10), and gaffers/lighting technicians, production coordinators/assistant directors, set/costume/make-up artists and VFX artists (9 each). Grip/key grip and script supervisors each appear eight times, and six respondents list “other” crew-related roles, confirming that the crew cohort in the survey primarily covers the technical and production backbone of film and TV, including freelance and atypical workers.

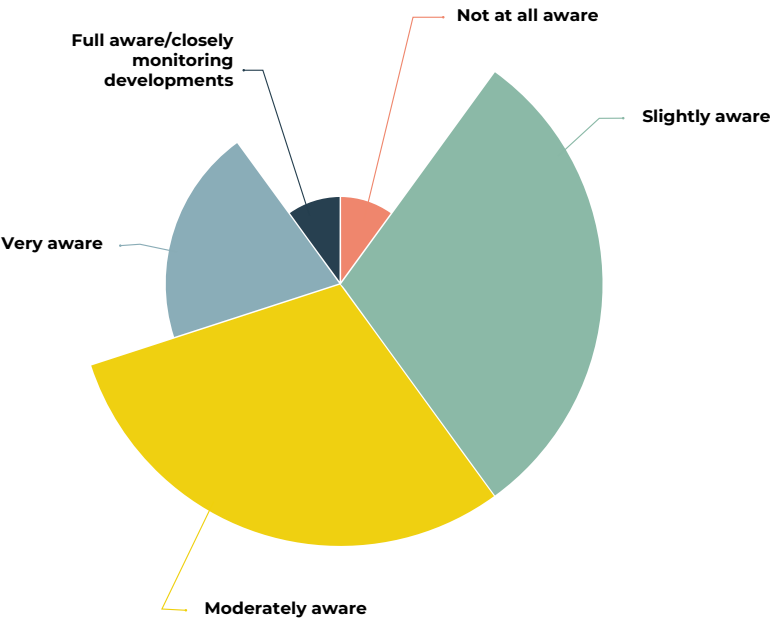


The sample of unions representing crew covers organisations with very different membership sizes in the relevant cohort. One respondent reports up to 250 members, two between 251 and 500, and four between 501 and 1,000 members. At the higher end, two unions report cohorts between 1,501 and 2,000 members, one between 2,001 and 3,000, and three unions represent more than 5,000 crew members in this cohort.

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

AI Awareness

Most responding crew unions report at least some familiarity with AI use in their sector. One organisation says it is not at all aware, three are slightly aware, three moderately aware, two very aware, and one describes itself as fully aware or closely monitoring developments.





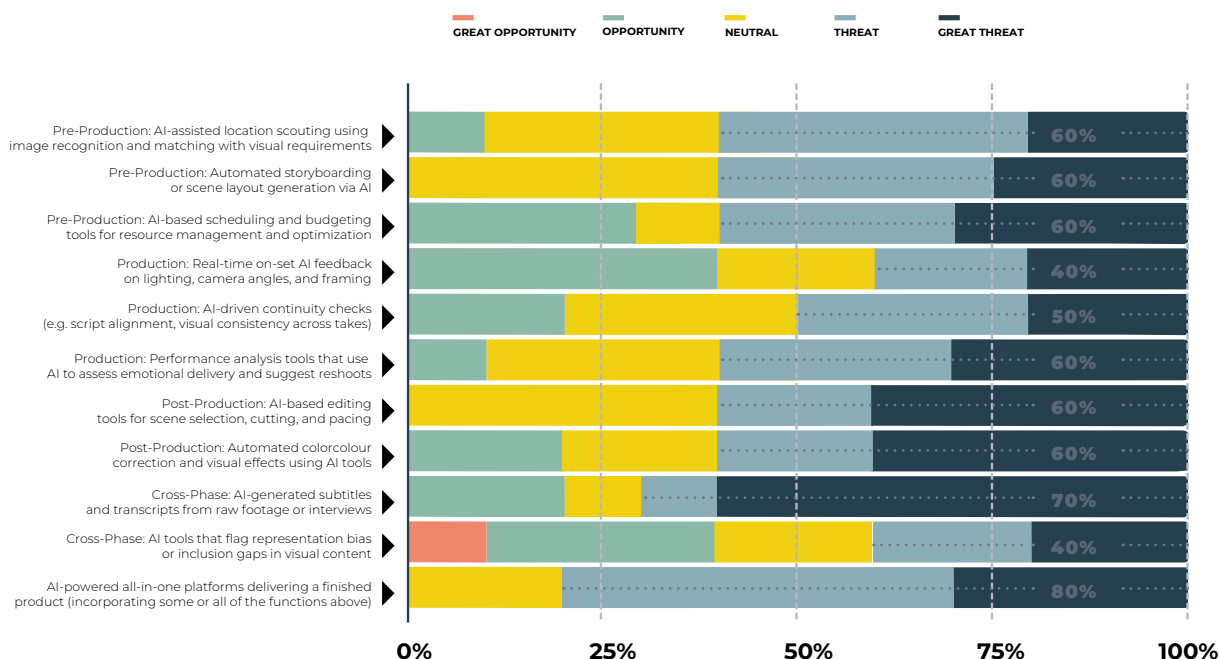
Across these applications, the respondents of unions representing crew members most often classify AI tools as common or very common, with relatively high awareness and relatively low “not used” shares. On average, 24% report “not aware”, 8% “not used”, 22% “less common”, 29% “common” and 17% “very common”, with the result that common/very common together account for roughly 46% of responses.

AI-based scheduling and budgeting tools, Automated storyboarding, AI-based editing tools, Automated colour correction and AI-generated subtitles are all considered common or very common by the unions (70%-80%). 3 out of 10 unions state that they are unaware of the use of AI feedback on lighting, Performance analysis tools, AI-based editing tools and AI tools that flag representation bias.

	USE	NOT AWARE
Pre-Production: AI-assisted location scouting using image recognition and matching with visual requirements	30%	20%
Pre-Production: Automated storyboarding or scene layout generation via AI	70%	20%
Pre-Production: AI-based scheduling and budgeting tools for resource management and optimization	80%	20%
Production: Real-time on-set AI feedback on lighting, camera angles, and framing	20%	30%
Production: AI-driven continuity checks (e.g. script alignment, visual consistency across takes)	40%	20%
Production: Performance analysis tools that use AI to assess emotional delivery and suggest reshoots	30%	30%
Post-Production: AI-based editing tools for scene selection, cutting, and pacing	70%	30%
Post-Production: Automated colour correction and visual effects using AI tools	70%	20%
Cross-Phase: AI-generated subtitles and transcripts from raw footage or interviews	70%	20%
Cross-Phase: AI tools that flag representation bias or inclusion gaps in visual content	10%	30%
AI-powered all-in-one platforms delivering a finished product (incorporating some or all of the functions above)	20%	20%

Perception

The perception of unions representing crew members of AI tools is dominated by “threat” and “great threat,” with only limited “opportunity” responses. On average across all applications, about 1% of answers fall under “great opportunity,” 16% under “opportunity,” 24% are neutral, and 58% are split between “threat” (27%) and “great threat” (31%).



No single application is strongly seen as a great opportunity. Only tools that flag representation bias or inclusion gaps register a small 10% “great opportunity” share; all other items have 0% in this category. Standard “opportunity” responses peak for real-time on-set AI feedback (40%), scheduling and budgeting tools (30%) but even here, threat and great-threat responses together remain higher.

Neutral responses vary between 10% and 40%. The highest neutral shares are for automated storyboarding (40%) and colour correction (40%)

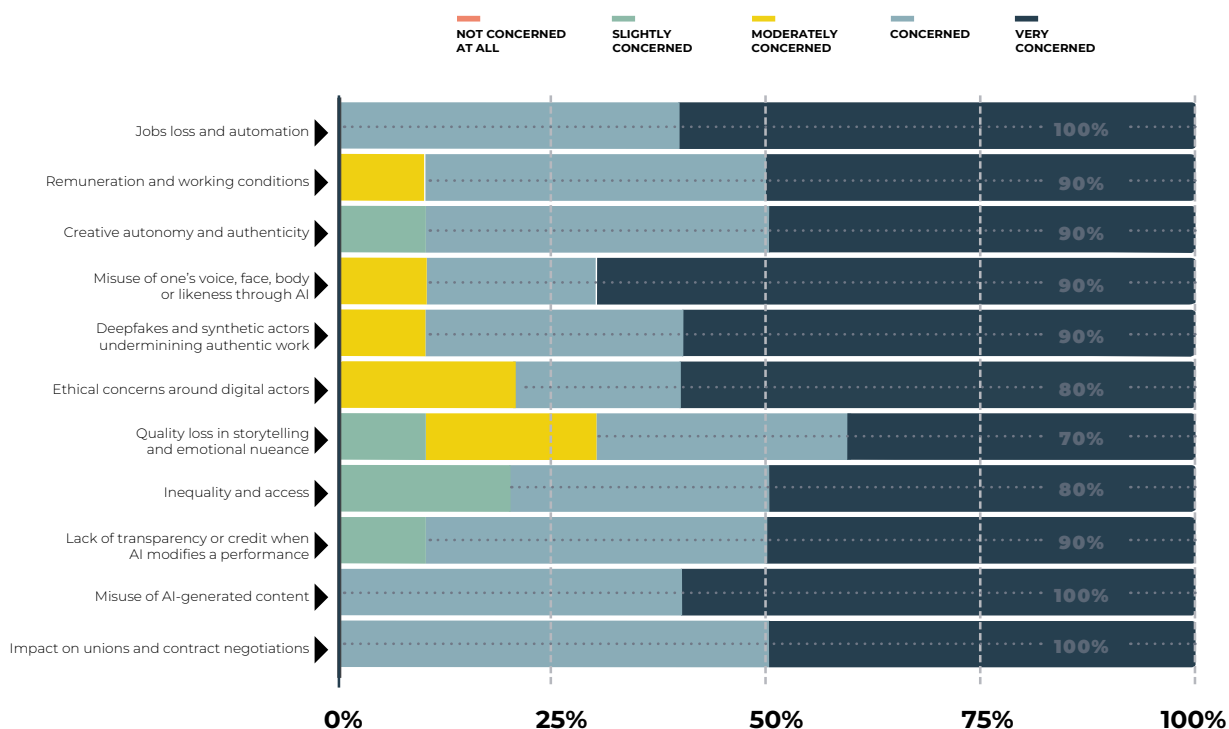
Across all items, “threat” and “great threat” together are consistently high, generally between 40% and 80%. AI-powered all-in-one platforms (80%) and AI-generated subtitles (70%) are seen as a threat by almost all unions.

	OPPORTUNITY	NEUTRAL	THREAT
Pre-Production: AI-assisted location scouting using image recognition and matching with visual requirements	10.00%	30.00%	60.00%
Pre-Production: Automated storyboarding or scene layout generation via AI	0.00%	40.00%	60.00%
Pre-Production: AI-based scheduling and budgeting tools for resource management and optimization	30.00%	10.00%	60.00%
Production: Real-time on-set AI feedback on lighting, camera angles, and framing	40.00%	20.00%	40.00%
Production: AI-driven continuity checks (e.g. script alignment, visual consistency across takes)	20.00%	30.00%	50.00%

Production: Performance analysis tools that use AI to assess emotional delivery and suggest reshoots	10.00%	30.00%	60.00%
Post-Production: AI-based editing tools for scene selection, cutting, and pacing	0.00%	40.00%	60.00%
Post-Production: Automated colour correction and visual effects using AI tools	20.00%	20.00%	60.00%
Cross-Phase: AI-generated subtitles and transcripts from raw footage or interviews	20.00%	10.00%	70.00%
Cross-Phase: AI tools that flag representation bias or inclusion gaps in visual content	40.00%	20.00%	40.00%
AI-powered all-in-one platforms delivering a finished product (incorporating some or all of the functions above)	0.00%	20.00%	80.00%

Concerns

Unions representing crew members report concern across all listed topics, with no respondents selecting “Not concerned at all” for any item. On average, 5% are slightly concerned, 6% moderately concerned, 35% concerned and 55% very concerned, with the result that 90% fall into the concerned/very concerned categories overall.



The UNI MEI unions have the highest amount of items where the concern is 100% negative. Job loss and automation, misuse of AI-generated content & impact on unions and contract negotiations is a concern for all unions. 7 out of 10 unions say that they are very concerned about the impact of AI on intellectual property rights.

	CONCERNED	NEUTRAL	NO CONCERNED
Job loss and automation	100%	0%	0%
Remuneration and working conditions	90%	10%	0%
Creative autonomy and authenticity	90%	0%	10%
Intellectual property rights	90%	10%	0%
Deepfakes and misinformation	90%	10%	0%
Ethical concerns around digital actors	80%	20%	0%
Quality degradation in storytelling	70%	20%	10%
Inequality and access	80%	0%	20%
Transparency and credit	90%	0%	10%
Misuse of AI-generated content	100%	0%	0%
Impact on unions and contract negotiations	100%	0%	0%
Average	12%	13%	75%

Unions representing crew members' concern scores are reinforced by qualitative examples that describe concrete risks in current productions.

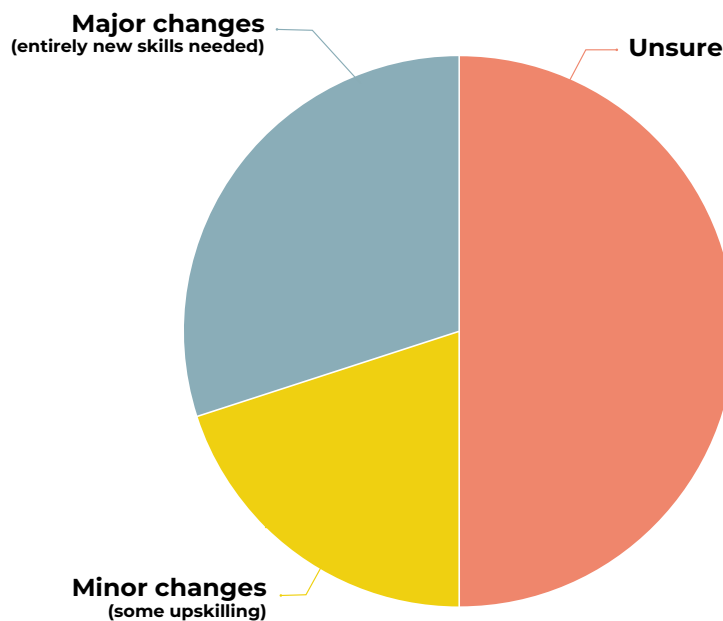
Several responses point to misuse of members' work for AI training and reuse. One union reports a case where an art department freelancer created a 3D model without a formal contract, was paid for the job, and later discovered that their model had been ***"fed into an AI model, with replicas of their original work reproduced and used by the production company, without notifying or reimbursing the original designer"***, raising complex questions about rights and proof of copying. Others mention sound-post members being asked ***"to clone artists' voices to add to a library"*** and working with generated AI content in ways that ***"potentially jeopardise other members' rights and access to work"***.

There are also examples of AI reducing days of work for specific groups. Unions note ***"an increase in digital scanning being used to scan supporting artists"***, which allows studios to ***"digitally use their voice and image ... in crowd scenes"***, with the result that ***"those workers would only be hired for one day rather than multiple days"***. Another case describes a post-production member who developed an AI model to generate realistic mouth movements for dubbed content in Welsh, halving production time for dual-language programmes, and who was themselves ***"concerned about the implications of this model"***.

More generally, unions characterise AI as a poorly regulated, transformative shift. Comments state that ***"AI is a revolution whose impact on both production and labour organisation is not adequately addressed by"***

trade unions”, that “there are no (at least) rules at all”. Someone says “We are concerned about all of these things. We hope we will be able to convince employers that a regulated use of AI is needed.” Another adds worries about property rights and substitution: “AI can be used to replace individuals on screen or with certain areas of creative work”, and there is “a concern that work will change in some areas if AI facilitates automation”.

Impact on skills and jobs

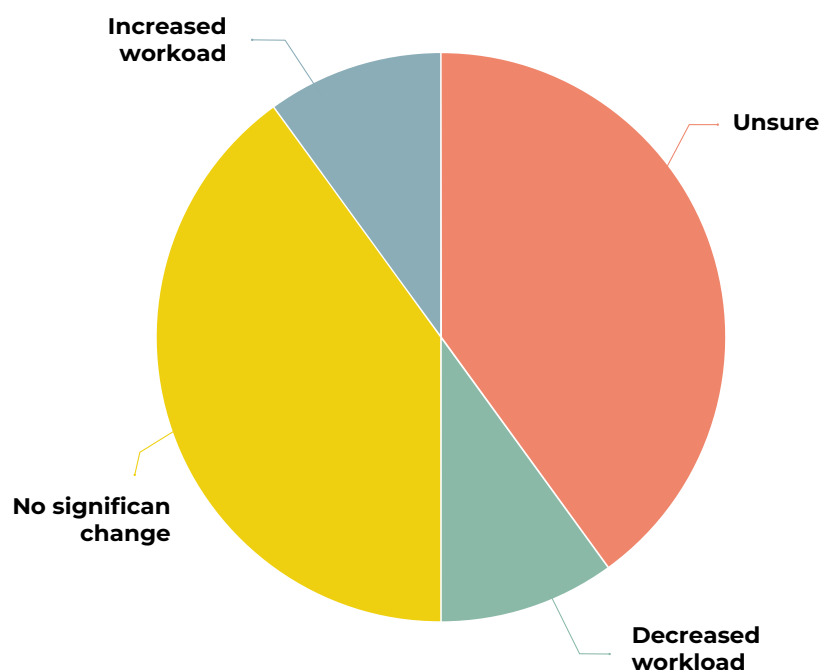


How AI will impact the skill requirements is for most unions unsure. 2 expect only minor changes while 3 state the entirely new skills will be needed.

The comments show that crew unions see AI as both a skills issue and a risk to career entry points. A union says “We are especially concerned about skills when it comes to AI replacing entry-level roles that allow workers to train on the job. We are also aware that currently there are very few members being upskilled to use AI tools, though the union is rolling out training. We are concerned about value being transferred into the tech space as there is not sufficient attention being paid to upskilling creative workers.”

Others comment that new skills are needed for the use of AI tools and that “for those who are accustomed to using software in film production the leap will not be huge”, whereas “for those who have limited experience with software ... the changes will be bigger”.

There is also a sense that unions themselves must adapt. One response says “our union needs a great change, but we are still struggling to get ready for that”, while another describes a lower sense of urgency among members “AI in general hasn’t been massively raised with us by members. There is a general belief it will impact the work, however it does not seem to be something extensively spoken about.”



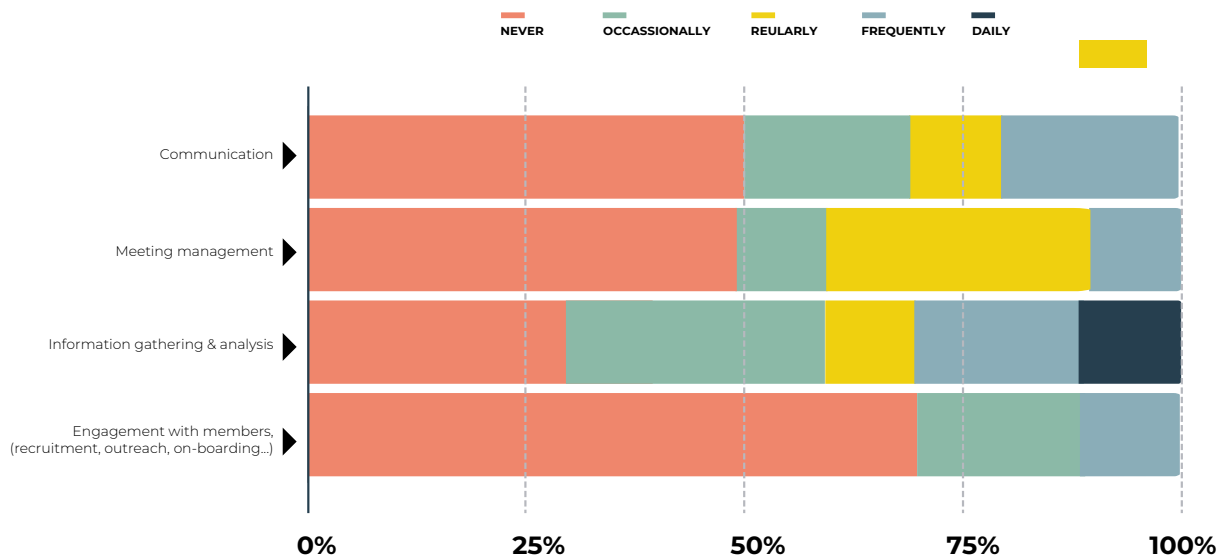
Crew unions describe AI's impact on workload and work opportunities as significant but hard to measure precisely. One notes *"We do not have a way of understanding the impact across our membership while there is little to no transparency on the roll out of AI across the creative industries. We know that for some, their opportunities are diminishing as AI replaces human creative capacity, though due to the freelance, short term nature of this work, it is very difficult to trace."*

The qualitative answers indicate that job opportunities are already shrinking in some areas. Unions report that *"many job roles are being replaced by AI"* and that *"for some, their opportunities are diminishing as AI replaces human creative capacity"*. One respondent observes that *"the workload that is taken away by AI is usually replaced by new workload."*

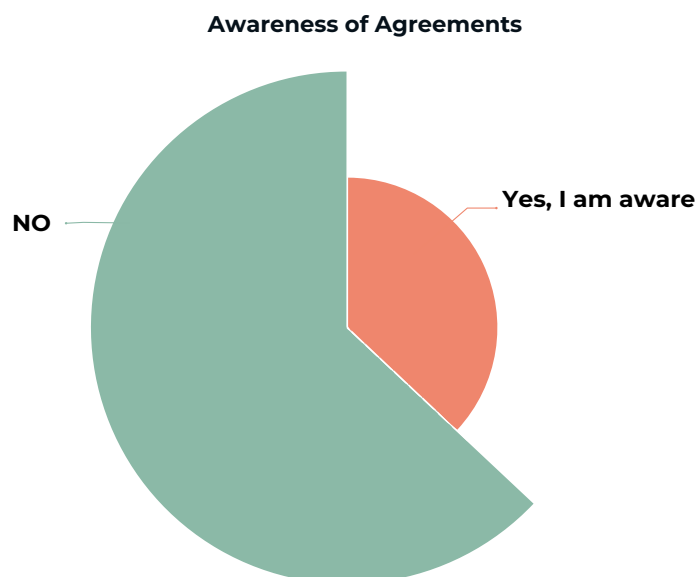
On workload distribution, unions describe a pattern of substitution rather than simple reduction. Comments state that AI *"is able to do more routine tasks, [so] people have been either fired or assumed more duties"*, and that it has *"helped in communication between production sectors but also shifted the workload to other situations"*. At the same time, another union underlines *"a lack of reporting on this from members"*.

AI work

For communication, usage is split: 50% say they never use AI, 20% use it occasionally, 10% regularly, and 20% frequently. For meeting management, 50% never use AI, 10% occasionally, 10% frequently, but 30% use it regularly. In information gathering and analysis, one third never use AI, another third uses it occasionally, 10% regularly, 20% frequently and 10% daily. For member engagement (recruitment, outreach, onboarding, advice), 70% never use AI, 20% occasionally, and just 10% frequently, with no unions reporting regular daily use.



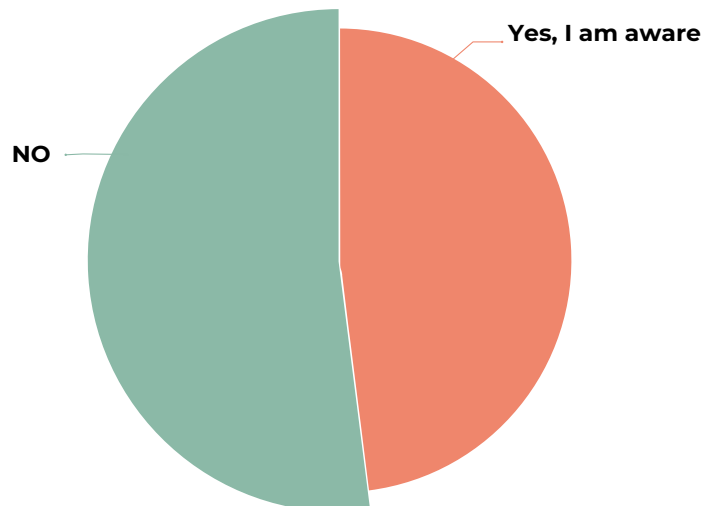
Across the open answers, unions describe AI as a fast-moving issue where they are already active, but still *“assessing the full impact on workers.”* One union notes that *“we have some clauses around image use for actors (supporting artistes) but otherwise there is little transparency over AI use – though we are aware there are some negotiations and agreements being looked at, the details remain unclear at this stage.”* Others emphasise that bargaining has started at sector level, explaining that *“in the film and audiovisual sector we are in sectoral negotiations. In both sectors we want to reach agreements with the employers on the use of AI”*, while another highlights that *“our organization, ..., submitted a draft regulation and restriction on Generative Artificial Intelligence to collective bargaining for the animation film production sector.”*



Concrete disputes and regulatory initiatives are beginning to emerge around specific practices. One union reports that *“discussions have arisen between members and employers about the use of AI dubbing and we have informed the members about how to approach such situations”*, often focusing on *“artist and payment for the use of their image or voice.”* At the same time, unions point to new legal frameworks in the

making, such as the announcement that *“the future Statute of the Artist in Spain will include protection of employment against the use of generative AI in the arts and culture sector.”*

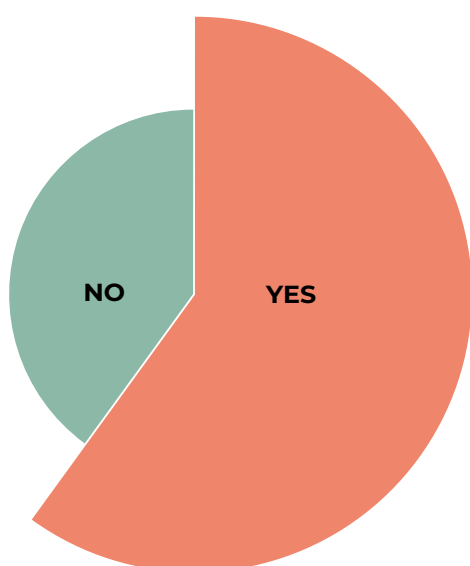
Awareness of Negotiations



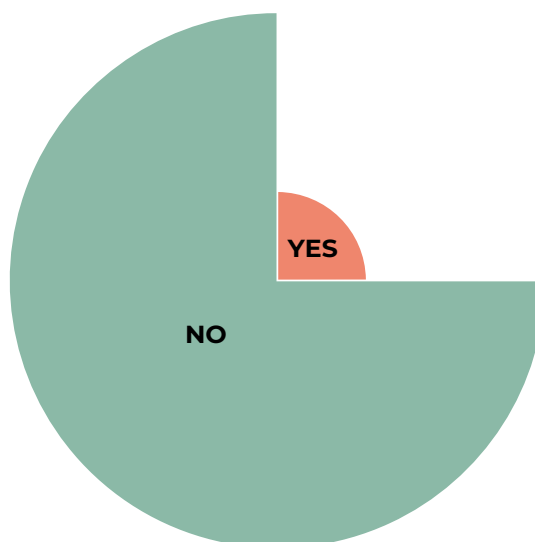
A small majority of crew unions are already active on AI in collective bargaining, but far fewer provide direct contract support to members.

Out of the 9 responding unions, 6 report involvement in collective bargaining on AI-related issues, while 3 have not been involved. In contrast, only 2 unions have so far advised on or drafted AI-related contract templates or similar support tools for members, compared to 7 who have not.

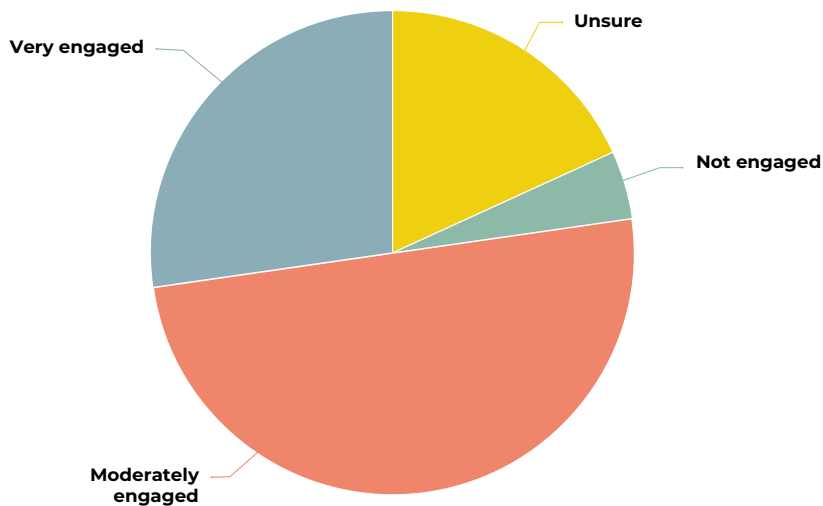
Has your union been involved in collective bargaining related to AI use, impact on working condition and/or remuneration?



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 emuneration

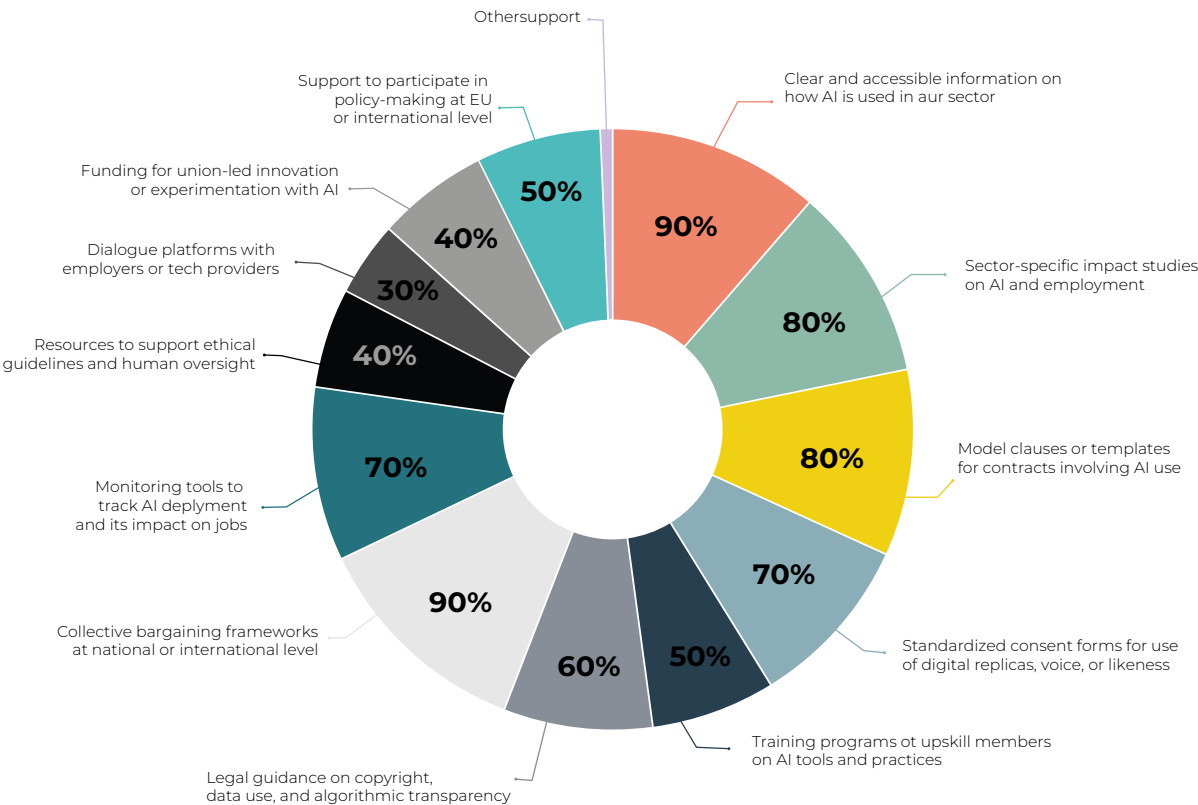


How engaged is your union in AI-related union or policy negotiations at the national or EU level?

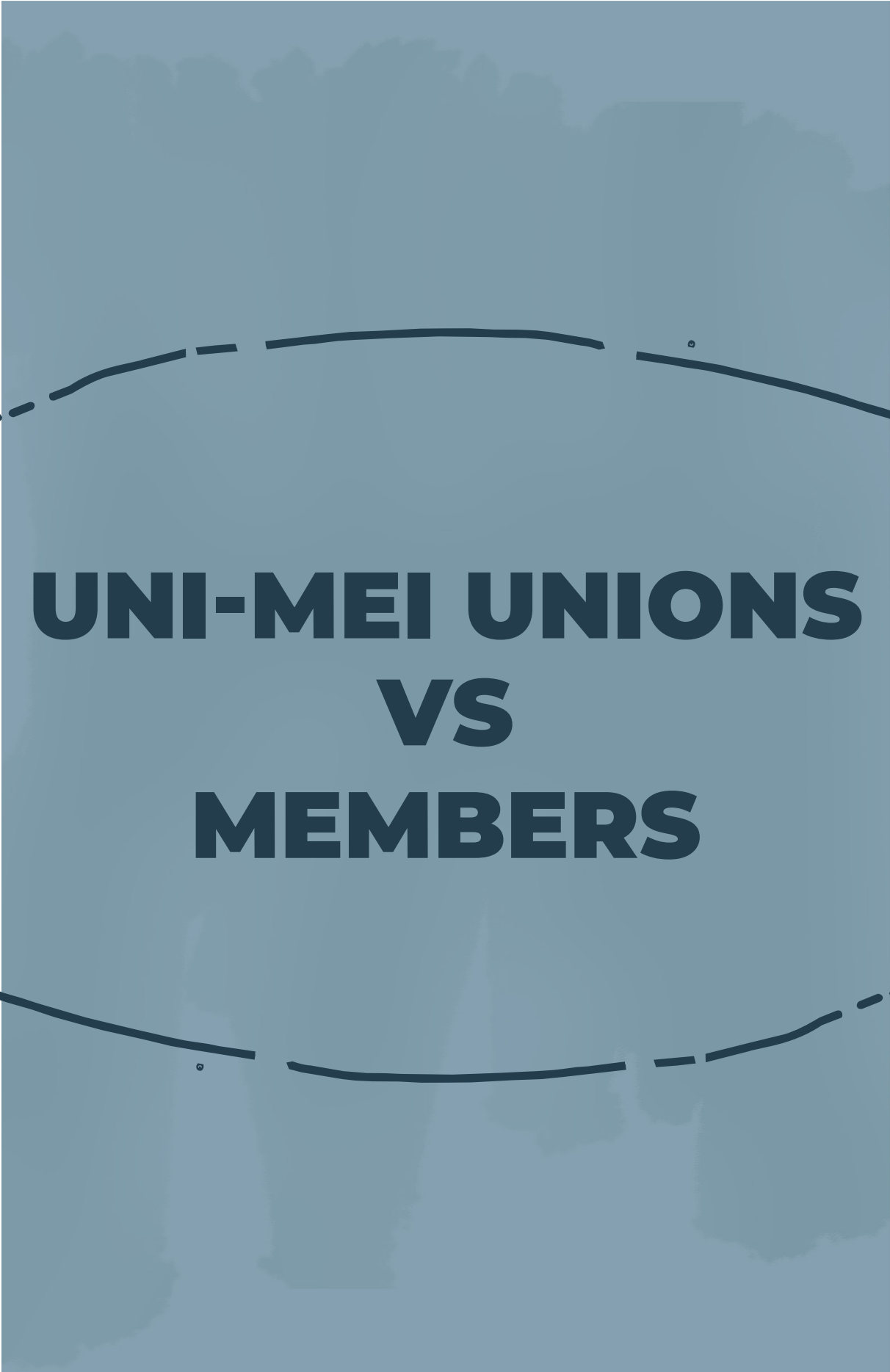


Two unions say they are very engaged, for example by submitting detailed demands in film and audiovisual negotiations or launching projects to unionise AI workers. Four unions report being moderately engaged, two are unsure, and one is not engaged in AI-related union or policy negotiations at national or EU level.

Training and support

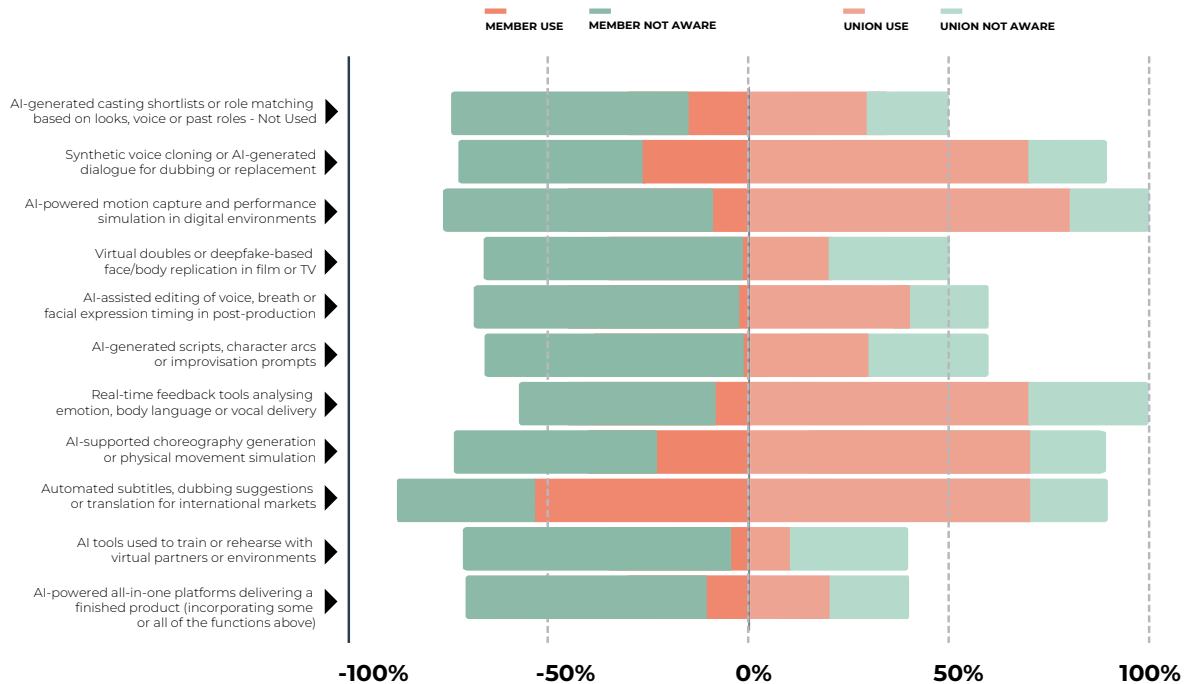


Out of all responding unions, 90% want clear information on how AI is used in their sector, 80% call for sector-specific impact studies on AI and employment, and 80% ask for model contract clauses. Around 70% seek standardised consent forms for digital replicas, voice or likeness and 50% want training programmes to upskill members on AI tools. In addition, 60% need legal guidance on copyright, data and transparency, 90% want collective bargaining frameworks, 70% ask for monitoring tools to track AI deployment, 40% for ethical-guideline resources, 30% for dialogue platforms with employers or tech providers, 40% for funding for union-led AI innovation, and 50% for support to participate in policy-making at EU or international level.



UNI-MEI UNIONS VS MEMBERS

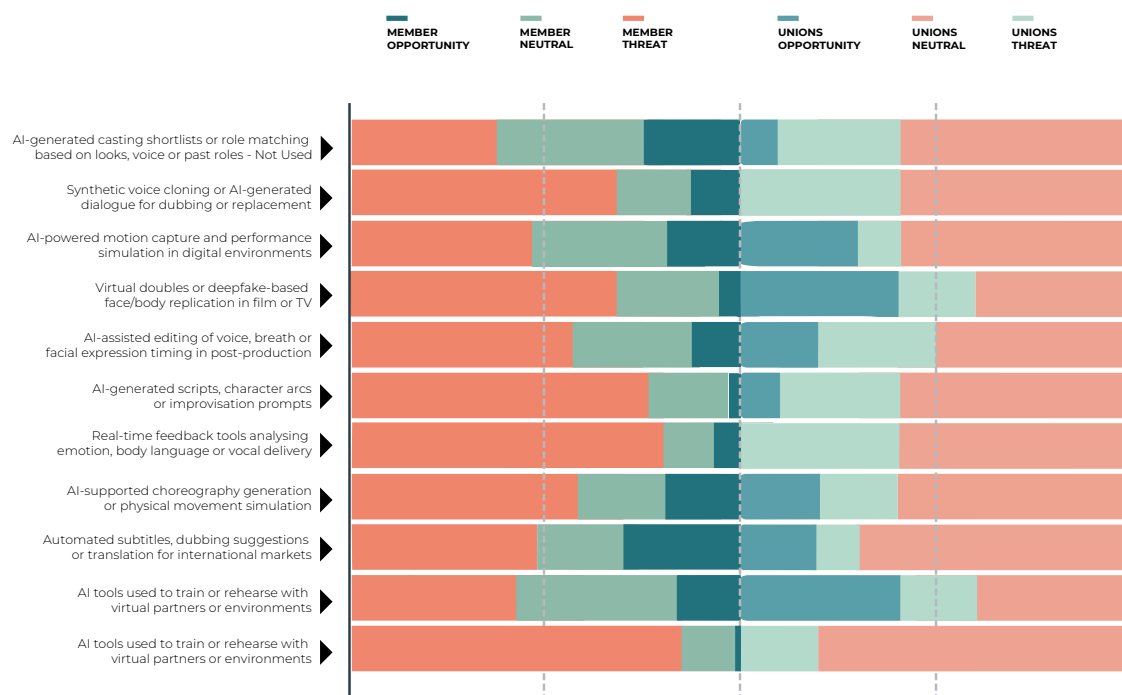
Awareness



For most AI tools in the crew workflow, UNI-MEI unions report much higher use than crew members themselves. For several pre-production and post-production applications – such as AI-based scheduling and budgeting tools, AI-based editing tools, automated colour correction and VFX, and AI-generated subtitles and transcripts – unions estimate that around 70–80% of productions use these systems, while member-reported use is far lower. For example: 8.7% of the members see a use of AI-based scheduling and budgeting tools while 80% of the unions report a use of these tools. Across the full list, average reported use differs by more than 30 percentage points, with the only relatively modest gaps appearing for all-in-one platforms and bias-flagging tools.

If we look at the “not aware” responses, the pattern flips into a consistent information gap. For almost all tools, the share of crew members who say they are not aware of the application exceeds the union share by 20–50 percentage points. The highest differences appear for AI-based scheduling and budgeting tools, performance analysis tools, and AI-driven continuity checks, where roughly two thirds of crew members report being not aware (around 64–68%), compared to only about 20–30% of UNI-MEI unions. Even for heavily promoted tools such as AI-assisted location scouting and automated storyboarding, member “not aware” rates remain close to or above 50%, while unions again sit around 20%. Taken together, these numbers suggest that UNI-MEI unions see AI already embedded across pre-production, production, and post-production workflows, whereas a large majority of crew either do not encounter these tools directly or do not recognise them as AI in their daily work.

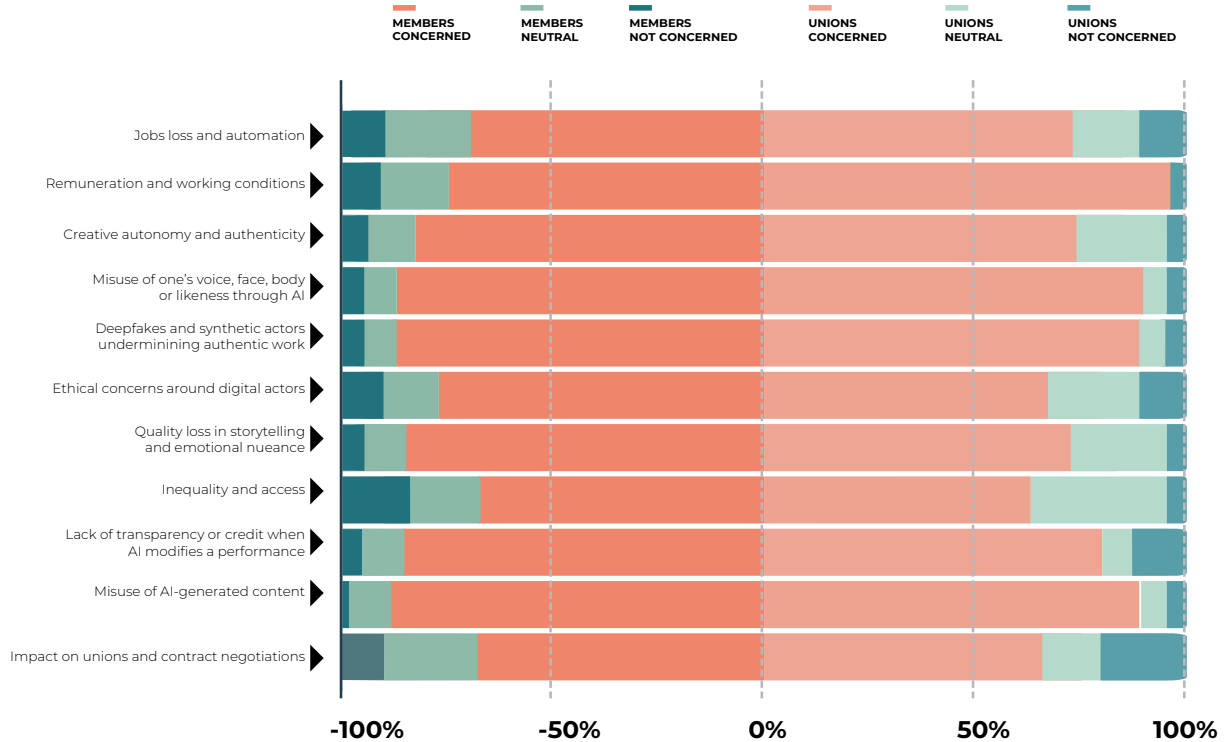
Perception



For most AI tools in the crew workflow, both UNI MEI unions and crew members predominantly see them as a threat, but unions are generally less alarmed and more willing to classify specific applications as opportunities or neutral. Across the full list, crew members' threat scores are systematically high (averaging 61%), and reach 77–85% for performance analysis tools, AI-based editing tools, and AI-powered all-in-one platforms, whereas unions' threat scores for the same tools sit 5% to 10% lower. The largest threat gap appears for real-time on-set AI feedback where crew are 29 percentage points more likely than unions to see these tools as a threat (69% vs 40%).

At the same time, unions are markedly more inclined to see some tools as opportunities or at least as neutral. For real-time on-set AI feedback and AI tools that flag representation bias, union opportunity scores are 24–34 percentage points higher than among members, and for AI-based scheduling and budgeting unions report 30% opportunity versus roughly 19% among members. Neutral evaluations show a similar pattern: for AI-based editing tools, 40% of unions take a neutral stance compared to about 13% of members, creating a neutrality gap of nearly 30 percentage points. Overall, this perception profile suggests that crew members experience many AI tools as immediate threats to jobs and craft, while UNI-MEI unions, although still largely critical, are somewhat more open to framing certain applications—especially scheduling, feedback and bias-detection tools—as manageable or even potentially beneficial within a negotiated framework.

Concern



For most issues, both crew members and UNI MEI unions report very high levels of concern, but unions are even more likely to say they are concerned about AI's impact on work and collective bargaining. Across topics like job loss, pay and conditions, autonomy, intellectual property, misuse, and the impact on unions, between 90% and 100% of UNI-MEI unions say they are concerned, compared to roughly 70–84% of crew members, with concern gaps of up to around 29 percentage points for job loss and over 26 percentage points for the impact on unions and contract negotiations. Crew members are also strongly concerned, especially about deepfakes, ethical issues and misuse, where around 89–91% are concerned and only about 4–5% are not concerned, but their responses show a slightly larger “neutral” and “not concerned” share than those of unions.

The main divergence appears around inequality and access. Here, crew members are much less likely to be concerned (about 52% concerned, and more than a quarter not concerned), whereas 80% of UNI MEI unions are concerned and only 20% not concerned, producing a concern gap of nearly 28 percentage points. This suggests that unions are more attuned to structural distributional effects of AI — who wins, who loses, and how access is organised — while crew members focus their strongest concerns on more immediate threats to jobs, rights, and the integrity of audio-visual content. Overall, the pattern confirms that both groups see AI as a serious problem, but unions express a more consistently high level of concern across all dimensions, especially where collective bargaining and sector-wide inequalities are at stake



CROSS SECTOR COMPARISON

Introduction

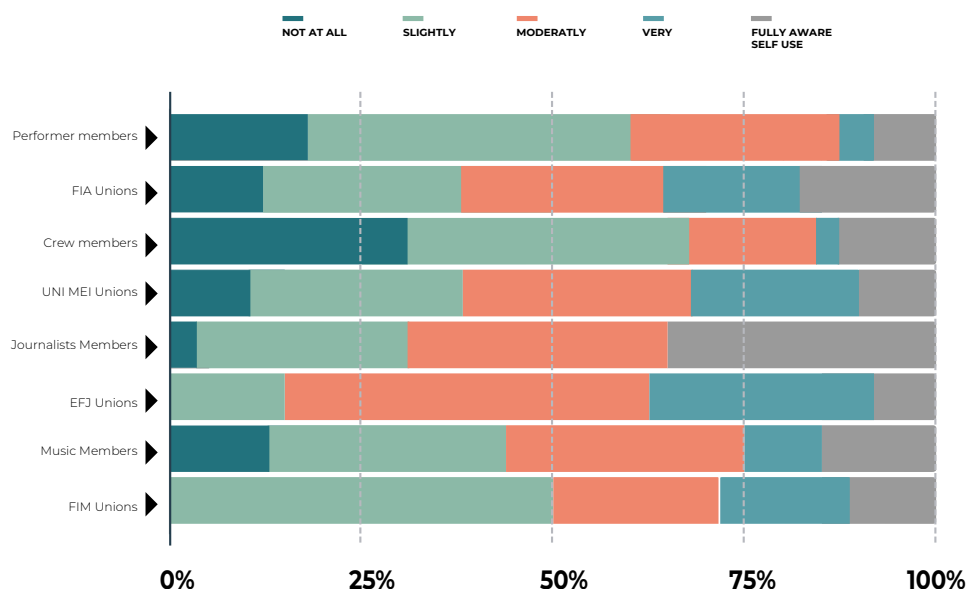
In this last part, we provide some general comparisons between the different sectors and the collected data of the union surveys and the national surveys for members. This chapter brings together the different strands of the study and looks across sectors to identify common patterns and divergences in 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.

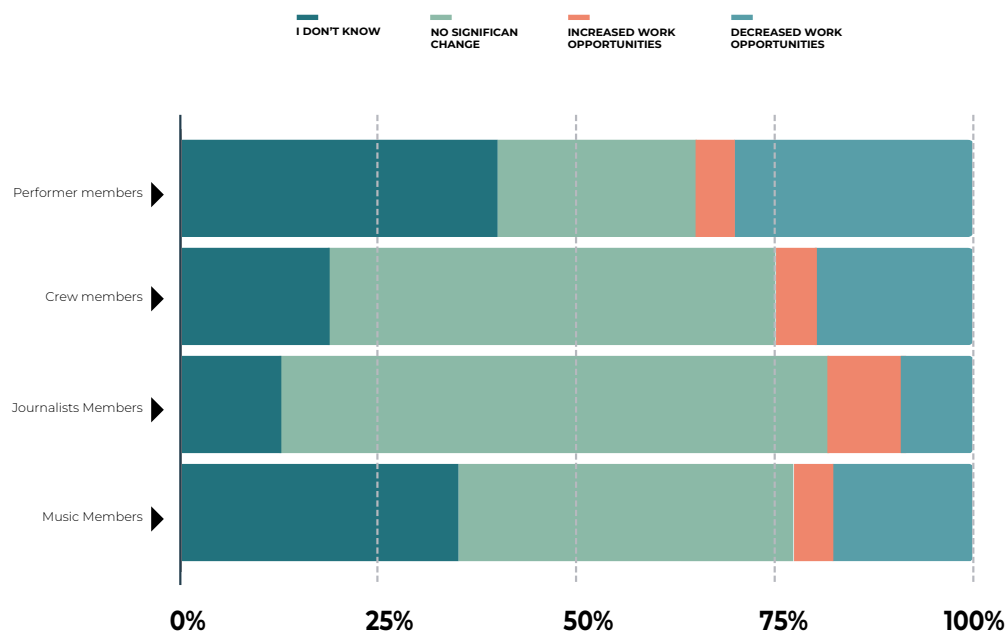
When we compare individual members with unions, a consistent awareness gap appears, although its size differs by sector. For actors (excluding musicians), around 56 percent of members surveyed are in the two lowest categories, while among FIA unions, only about 9 percent are not at all aware and roughly 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.

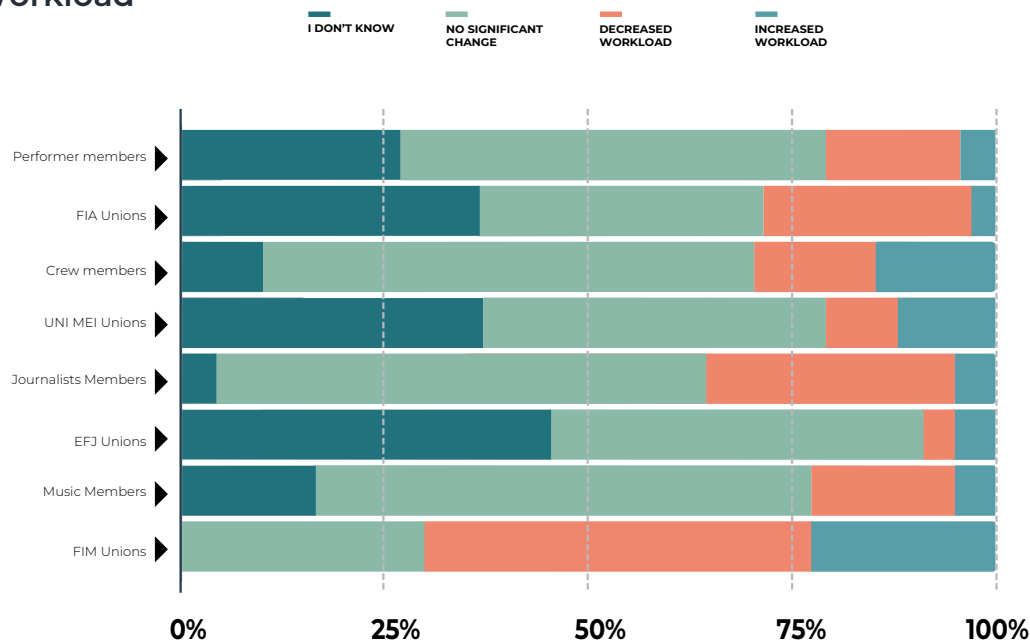
Expected impact of AI

•• 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

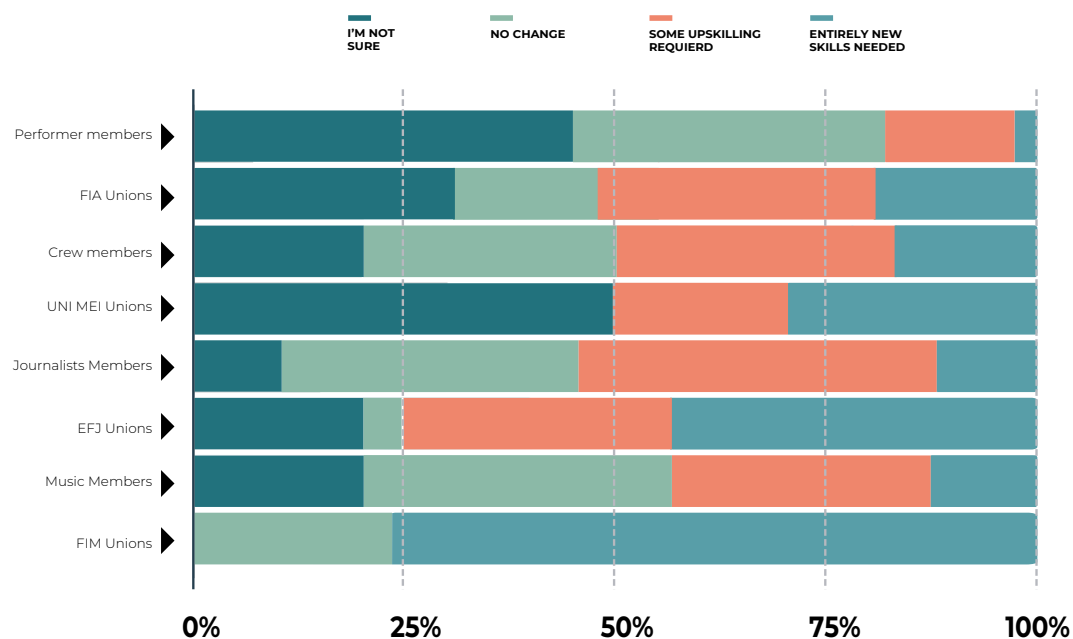


Across all four sectors, members and unions broadly assume that AI has not yet transformed daily workload, but unions perceive more change and uncertainty than their members. A majority of actors, crew, journalists and music professionals report “no significant change” (55–61%), while unions in each 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

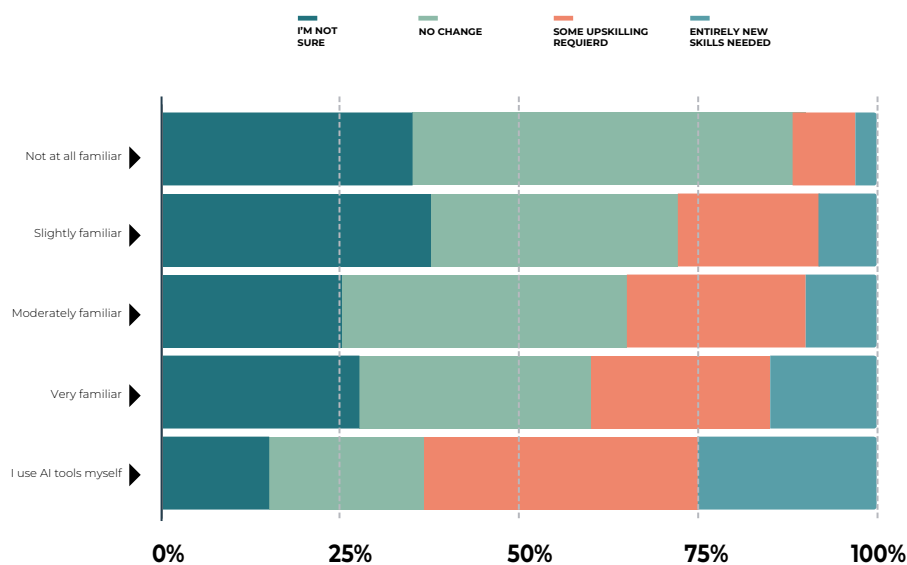


The survey data reveals a striking divergence between how union members and their representative organizations perceive the skill implications of AI. Across all categories (actors, crew, journalists, and music workers) unions consistently report higher rates of “some upskilling required” and “entirely 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.

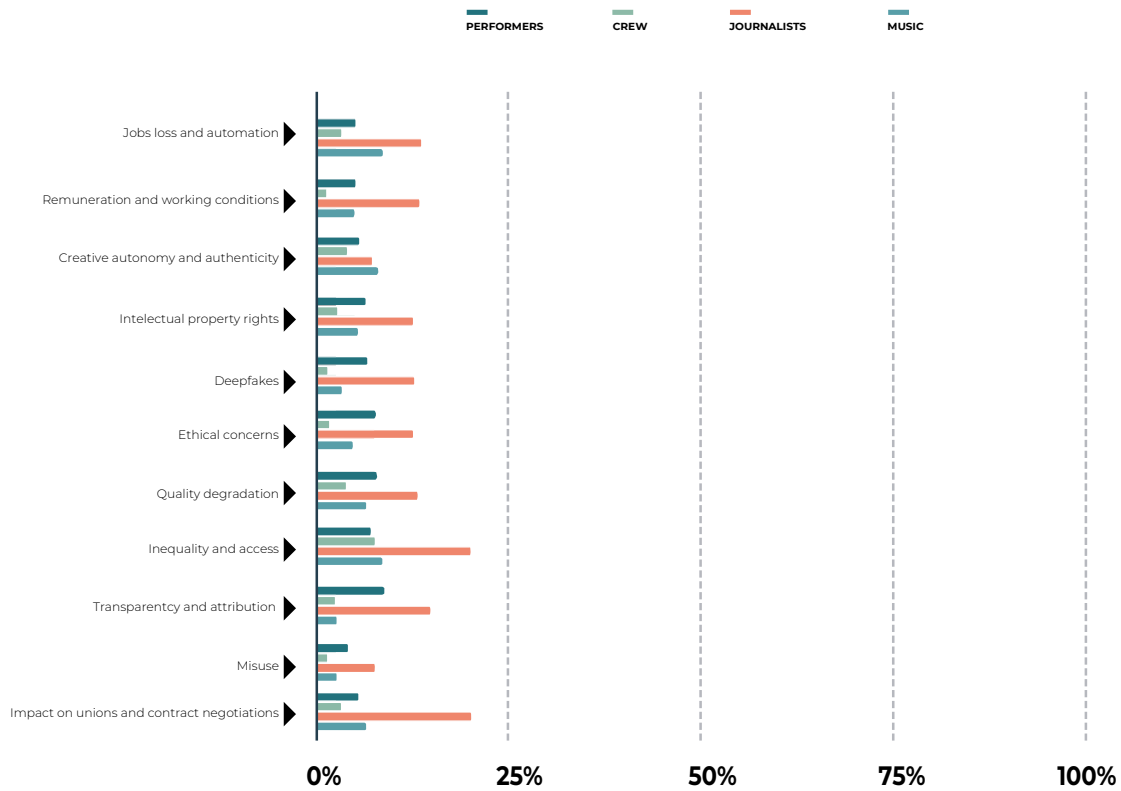
Also notable is the persistently high level of uncertainty (“I’m not sure”) across all groups including the most experienced ones. Even among respondents who use AI tools themselves, 9% remain uncertain about the impact on their skills, and in the “very familiar” group that figure rises to 27%.



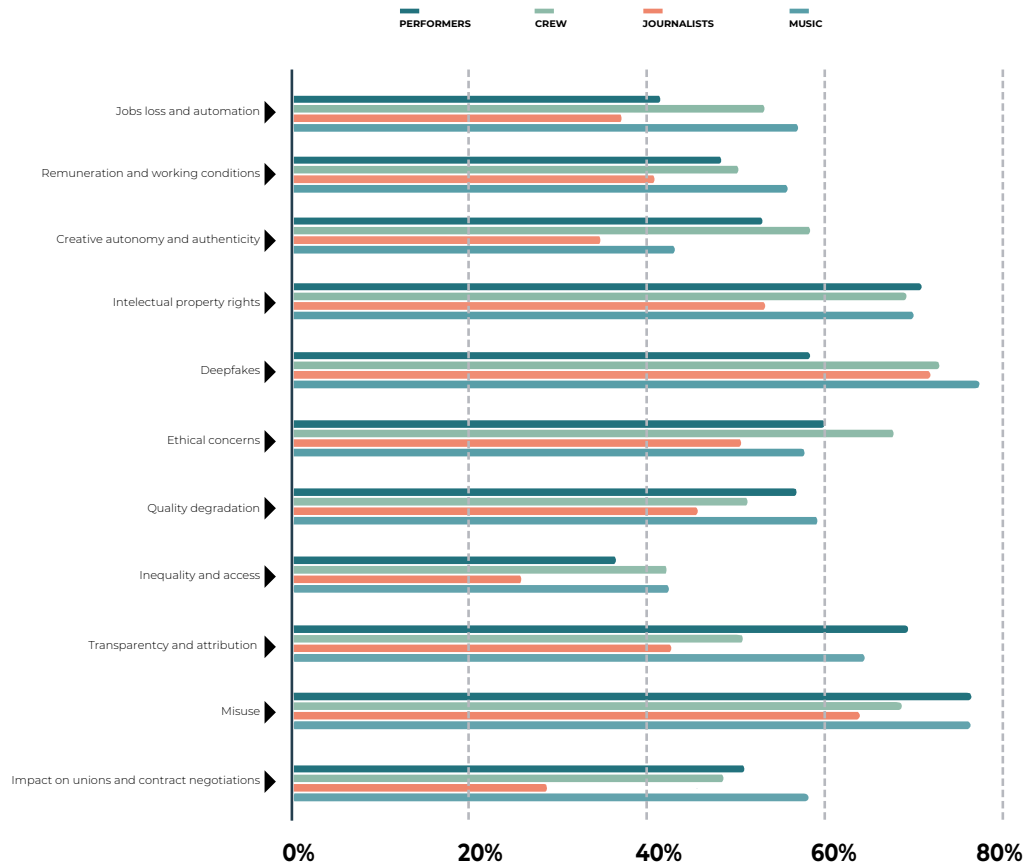
Concern

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..

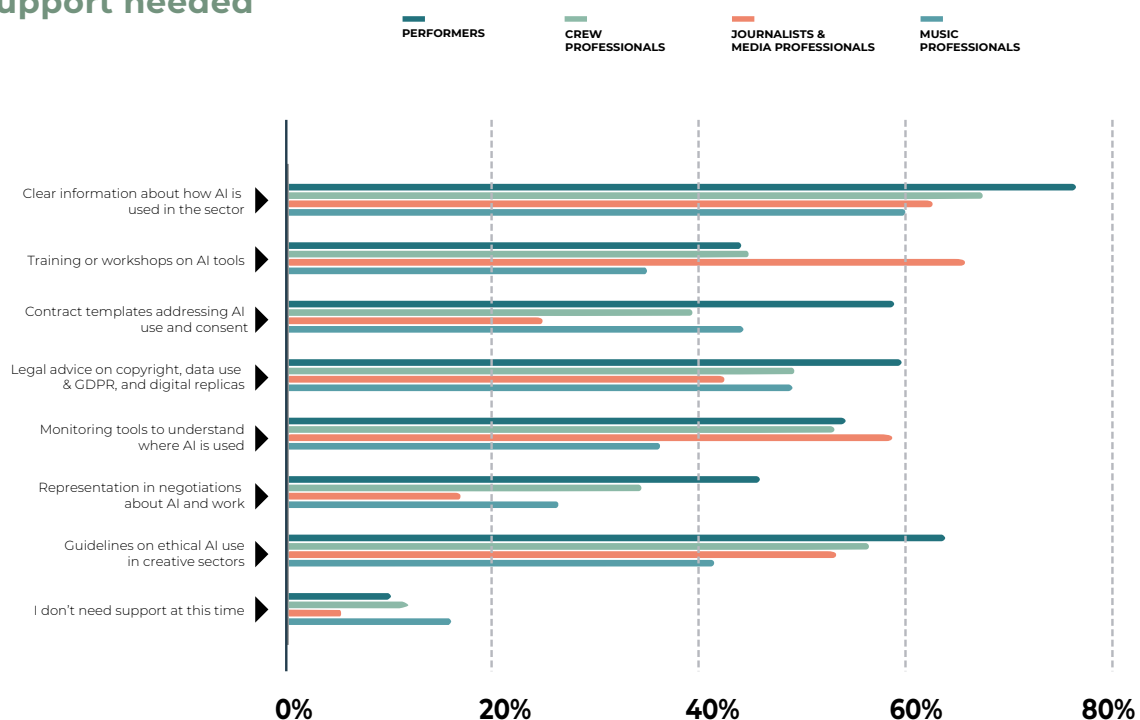
FIM (music unions) shows the inverse pattern: FIM unions are on average slightly more concerned than music members, but score strikingly lower on creative autonomy (23% vs 55%). The fact that music unions rate IP rights, misuse and deepfakes as highly as members do, yet almost disregard creative autonomy, 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.

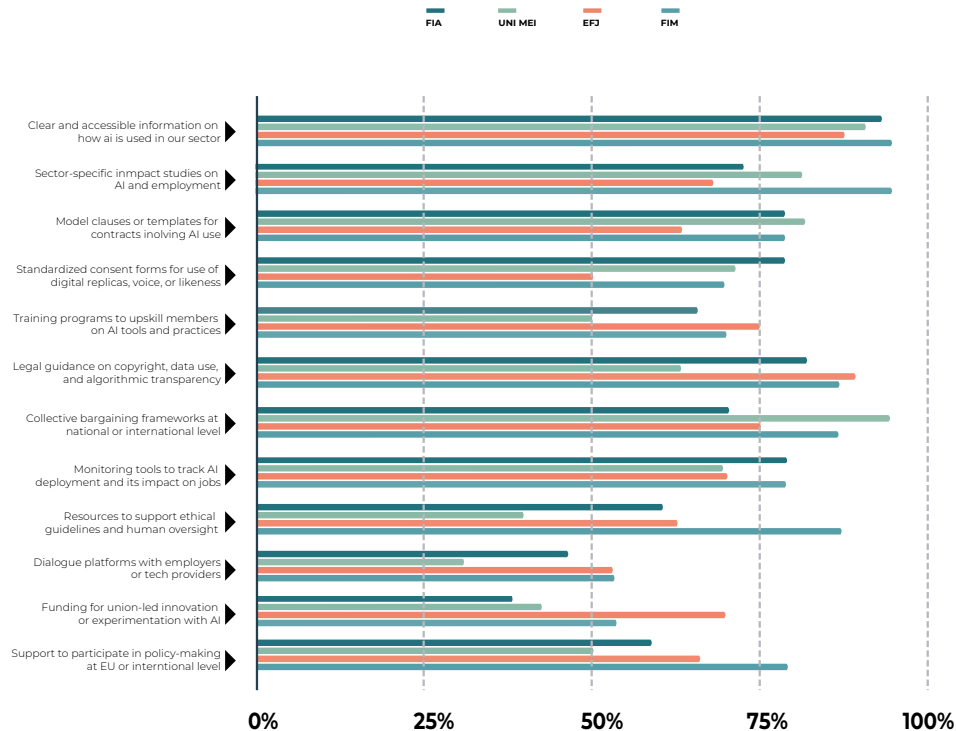
Support needed



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.



This project and publication have received the support of the European Union. The publication reflects the views of the authors only and the European Commission cannot be held responsible for any use of the information contained therein.