



AI AND WORK

IN THE MEDIA, ARTS & ENTERTAINMENT SECTOR

PART 4/4
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

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.

The background is a solid teal color. Faint, light-blue silhouettes of trees are visible in the upper and lower portions. A hand-drawn, dark blue/black line curves across the middle of the image, passing behind the text. The line is composed of several segments, some solid and some dashed, giving it a sketchy appearance.

MUSIC PROFESSIONALS

ANALYSIS OF 93 MUSIC PROFESSIONALS FROM FINLAND AND THE UNITED KINGDOM

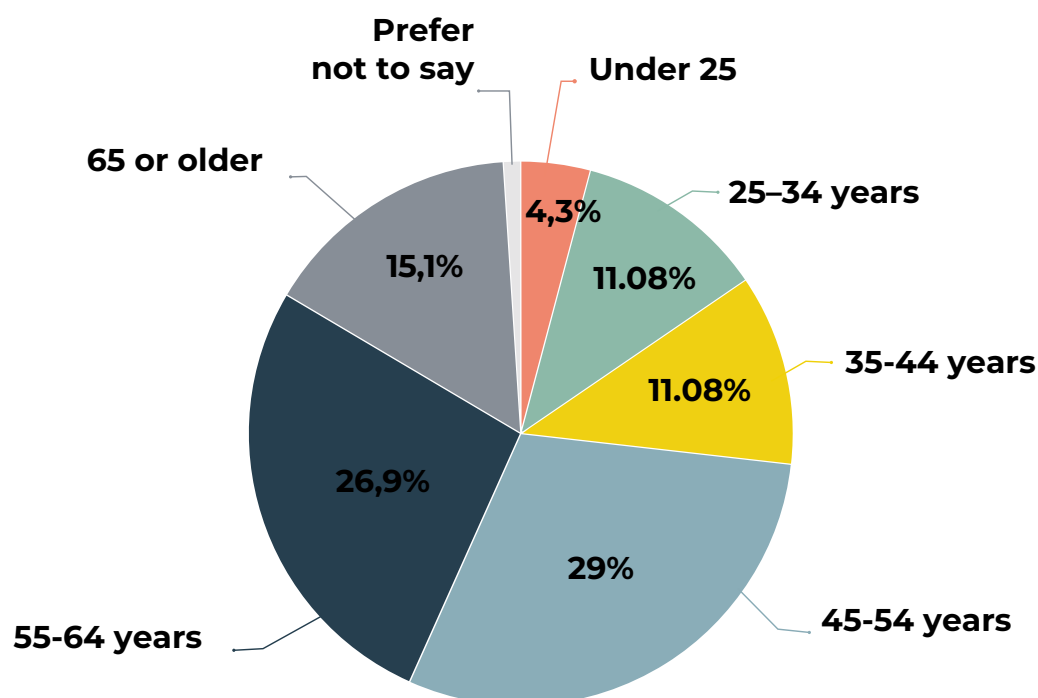
Respondents: 93 music professional

Geographical Focus: Finland (63%), United Kingdom (37%)

PROFILE

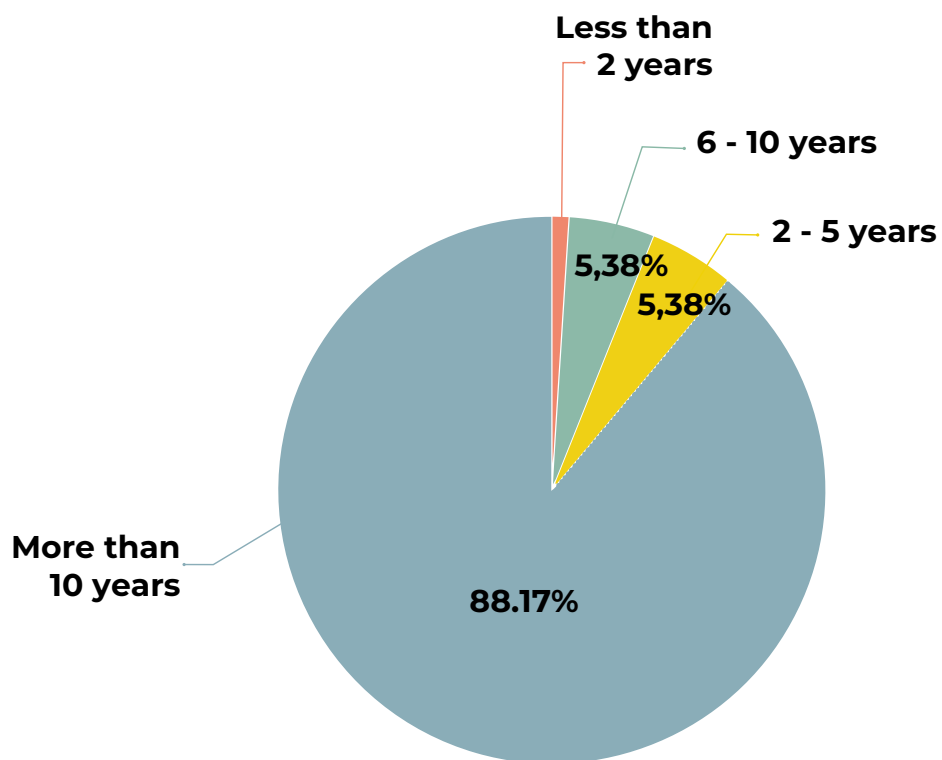
•• Age

Out of 93 music-sector respondents, the profile skews older. The largest age group is 45–54 (29.03%), followed by 55–64 (26.88%) and 65 or older (15.05%). Taken together, respondents aged 45+ make up 70.97% of the sample (66 people). Smaller shares fall in the 35–44 and 25–34 brackets (11.83% each), while under 25 represents 4.30%. 1.08% (1 person) preferred not to disclose age.



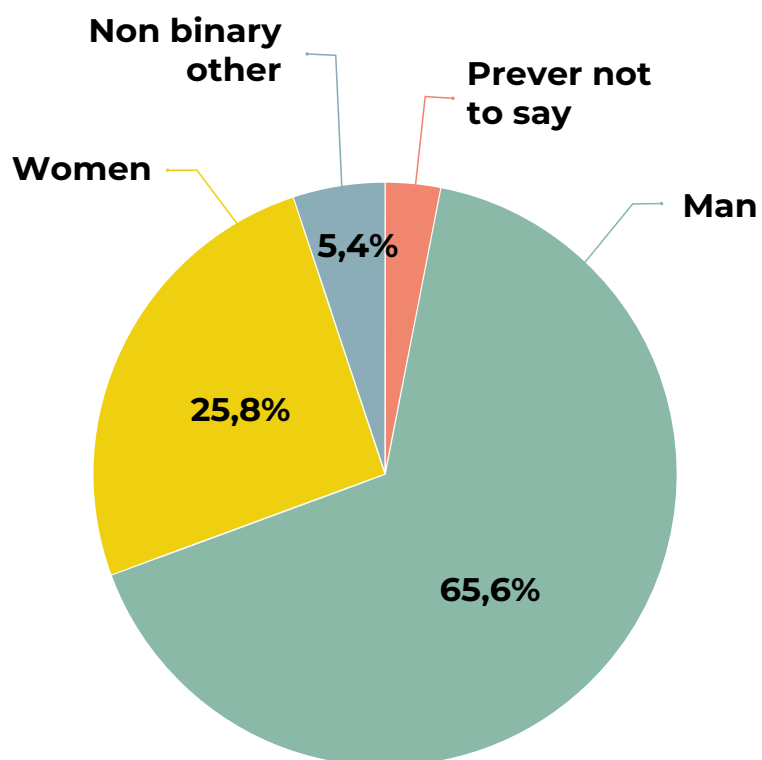
•• How many years of experience do you have in your profession?

The music sample is overwhelmingly composed of highly experienced professionals. More than 10 years of experience is reported by 81 respondents (88.17%), while 6–10 years (5; 5.38%) and 2–5 years (5; 5.38%) are minor shares. Only 1 respondent reports less than 2 years (1.08%). Overall, those with 6+ years account for 93.55% (87 people), indicating that the findings largely reflect long-established careers.



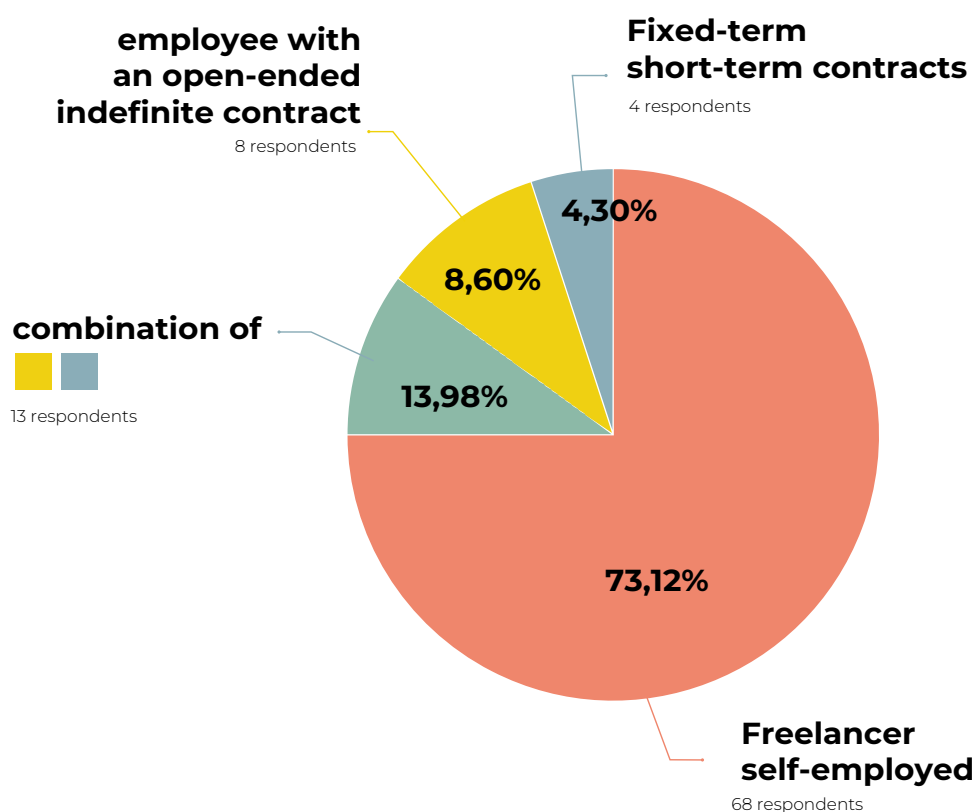
•• Gender

The gender balance leans strongly male. Men account for 61 respondents (66%), while women represent 23 (25%). Non-binary respondents make up 5% (5) and 3% (3) preferred not to say.



•• What are your usual work arrangements?

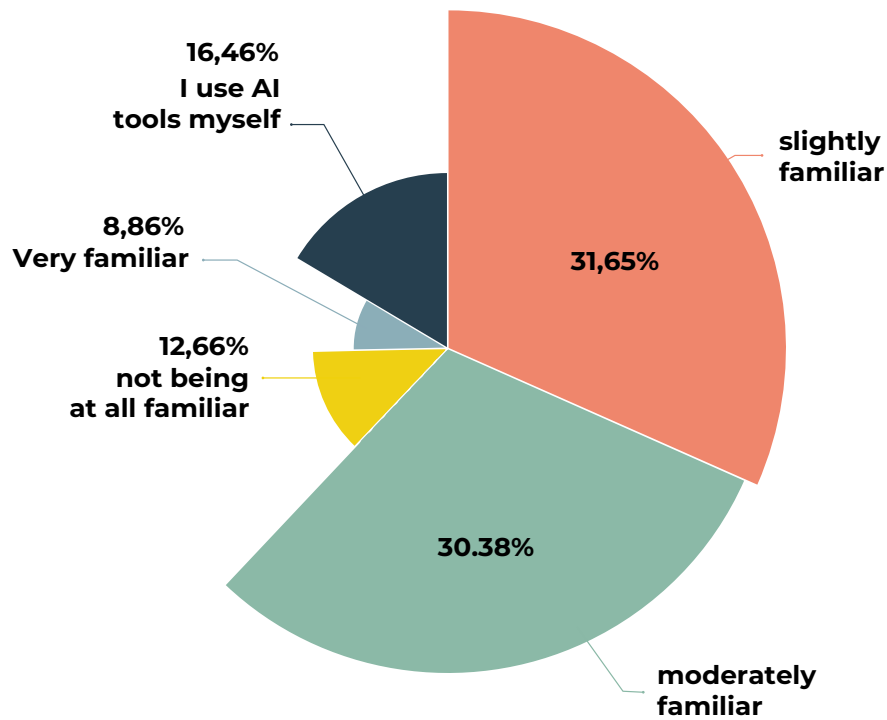
Work patterns are predominantly independent. Freelancer / self-employed is the dominant arrangement (68; 73.12%), with a combination of arrangements at 13.98% (13). Smaller shares report open-ended / indefinite contracts (8; 8.60%) or fixed-term / short-term contracts (4; 4.30%). Taken together, 87.10% (81 people) are in freelance or mixed arrangements, reinforcing a strong project-based/independent employment profile in this sector.



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

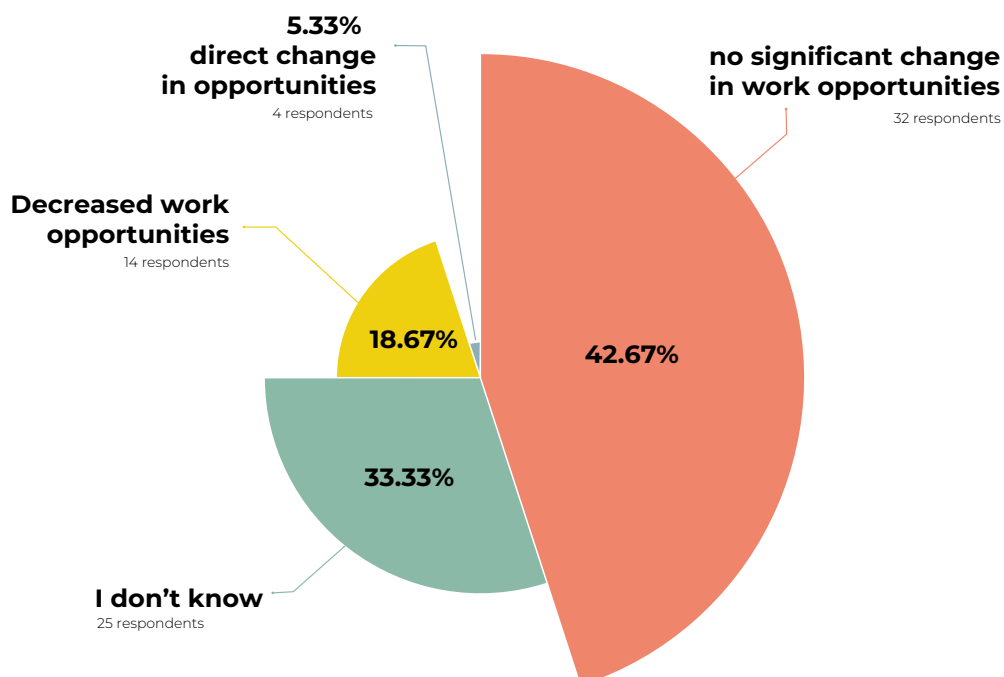
Out of 417 actor respondents who answered this question, familiarity with AI in the work environment is Out of 79 music-sector respondents who answered this question, familiarity with AI is mixed but leans toward basic-to-moderate awareness. The largest group is slightly familiar (25; 31.65%), closely followed by moderately familiar (24; 30.38%). Together, these mid-range categories represent 62.03% of responses (49 people). Smaller shares report not at all familiar (10; 12.66%) or very familiar (7; 8.86%).

Notably, a relatively substantial minority report hands-on use: 13 respondents say they use AI tools themselves (16.46%). Combined, those who either use AI tools or are very familiar account for 25.32% (20 people), suggesting that direct engagement with AI is more common in the music sample than in some other sector groups, even though most respondents still sit in the “slightly” or “moderately” familiar range.



•• Has AI affected your work opportunities?

Out of 75 music-sector respondents who answered this question, the most common response is no significant change in work opportunities (32; 42.67%). A sizeable share remains uncertain, with 25 selecting "I don't know" (33.33%). Fourteen respondents report decreased work opportunities (18.67%), while 4 report increased work opportunities (5.33%).



Overall, 24% of music respondents (18 people) perceive a direct change in opportunities (increase or decrease), and this is more often negative than positive: reported decreases are 3.5 times as common as increases (14 vs 4). The remaining 76% (57 people) either see no change or are unsure, suggesting that within this sample, AI's impact on music work opportunities is most often perceived as stable or not yet clearly identifiable, with negative effects reported by a notable minority.

The remarks fit the quantitative pattern quite well: most music respondents describe no clear change yet or uncertainty, while a notable minority report declining opportunities, especially in more commercial segments. A first cluster consists of respondents who either do not see a direct impact in their own work or feel it is too early to judge. This appears in comments such as *"So far it has not affected me. I create original compositions for multi-disciplinary projects"*, *"I haven't noticed that it has affected my personal job opportunities yet"*, and the simple but telling *"How would I know?"* Others explicitly separate current market difficulties from AI: *"There have been fewer concerts and sessions in 2025 but this is due to economic factors"* and *"Corona killed and changed the purchasing behaviour of the masses quite enough."* These remarks help explain why so many respondents selected either *"no significant change"* or *"I don't know"*.

Where respondents do report declining opportunities, the remarks show a strong concentration in commercial music, sync/catalogue, audio branding, and technical audio services. One respondent gives a direct example of substitution: *"Lost a job where I was contracted to write a theme tune for a holiday park [they] ended getting AI go compose the theme."* Others identify broader shifts in commercial demand: *"The field of commercial music seems to be the first to undergo a transformation"*, *"Less recordings for commercial purposes"*, *"Catalogue music opportunity has decreased"*, and *"I have noticed less demand in channel sound design in particular, because it is now easier and cheaper to do it with AI tools."* Several remarks also point to platform/environmental uses of AI-generated music that weaken musicians' earning models more indirectly, such as *"A.I.-based music can be played in restaurants and on the radio, affecting the musician's earning logic."*

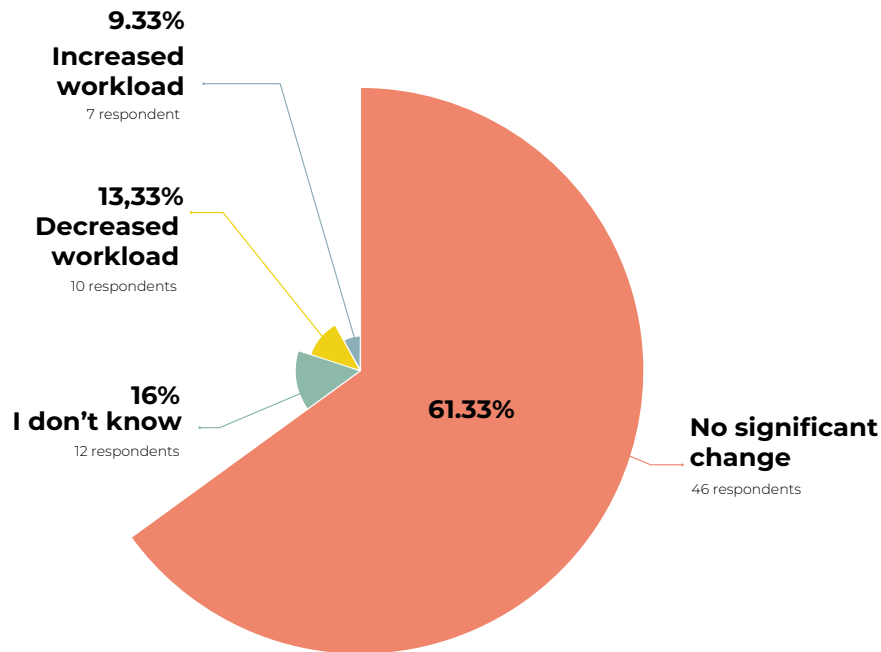
At the same time, some respondents distinguish between AI pressure in certain markets and the continued value of live or specialist human performance. For example, one remark notes, *"Most people don't consider a computer pushing out sounds on its own to be live music"*, suggesting that AI may affect background/commercial uses earlier than live performance-based work. Others describe themselves as less exposed due to their practice or position: *"I'm in the experimental scene, so opportunities feel sparse at the best of times, and I haven't experienced a significant/noticeable downturn"*, or *"I am mainly an amateur actor. AI has no bearing on my musical activities."* This reinforces a key qualitative takeaway: AI's opportunity effects in music are highly uneven by market segment and role.

Positive opportunity effects are rare but do appear, usually as expanded capability rather than more paid music jobs. One respondent explicitly describes AI as enabling work they could not previously do alone: *"I use it as a tool and now I can, for example, produce things that I couldn't do on my own before."* Another note using AI to speed up applications and admin: *"I used AI for correcting my emails and cover letters. It made the application process faster."* These examples align with our survey pattern: reported gains exist, but they are limited, and they tend to relate more to productivity and self-production capacity than to increased demand for musicians' core creative labour.

•• Has AI affected your workload?

Out of 75 music-sector respondents who answered this question, most report no significant change in workload (46; 61.33%). A further 12 selected "I don't know" (16.00%), indicating that for about one in six the workload implications of AI remain unclear. Among those who do report a change, 10 respondents say AI has decreased their workload (13.33%), while 7 report an increased workload (9.33%).

Overall, 22.67% of music respondents (17 people) perceive a direct workload shift (increase or decrease), and when a change is reported, it leans slightly toward decrease rather than increase (10 vs 7). The remaining 77.33% (58 people) report either stability or uncertainty regarding AI's effect on workload.



Country-level patterns in the music sample suggest that these perceived impacts are not evenly distributed. Finnish respondents are more likely to report that their workload has seen **“no significant change”**, pointing to comparatively stable working conditions, while respondents from the UK more often select **“I don’t know”**, indicating a higher degree of uncertainty about AI’s impact. At the same time, AI familiarity is higher among UK respondents than among Finnish respondents, suggesting that greater exposure to AI tools does not automatically translate into clearer experiences of workload change.

The remarks on this section of the survey strongly support the quantitative result that workload impacts in music are mixed but modest overall, with most respondents reporting no major change. A clear cluster describes workload reductions through admin, communication, and technical support tasks, which helps explain why reported decreases slightly outnumber increases. Respondents mention AI helping with **“emails writing or any other text writing”**, being able to **“translate my text in different languages”** and speeding up **“mechanical tasks such as translating a CV into a different language.”** Others describe technical-audio efficiencies: **“I use AI-based mixing tools to create karaoke backgrounds”**, **“AI is saving me time when I am doing technical audio work”**, and **“Speeds up processes.”** In these remarks, AI is mostly framed as a practical support tool that reduces time on peripheral or repetitive work.

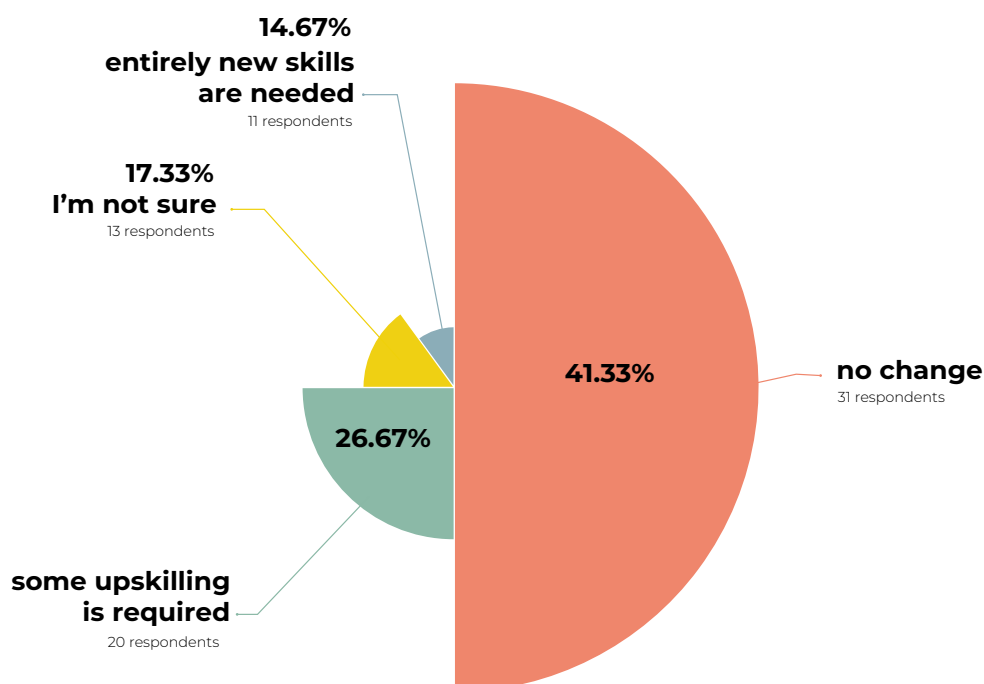
A third important cluster involves rework caused by poor AI outputs, which mirrors patterns seen in other sectors. One respondent reports being **“often presented with a mediocre AI-generated track and asked to fix it”**, adding that the people providing these materials are **“much more difficult to work with than beginners who have some idea what they’re doing.”** Another similarly notes that **“The need to fix, for example, mixes or mastering of recordings ruined by artificial intelligence has increased my workload slightly.”** These remarks are especially useful for interpreting the mixed workload data: AI may reduce time in some tasks, but it can also create new work in the form of cleanup, correction, and managing unrealistic assumptions about what AI outputs are ready for.

The remarks also include a sizeable group whose workload remains stable because they avoid AI, use it only minimally, or work at their own pace. Examples include **“I have no interest in using AI in this capacity”**. Others consciously choose not to adopt AI in teaching or artistic work, even if they recognize it could assist: **“Even though I could use AI applications to assist, particularly in teaching, I prefer to use my skillset gained over many years.”** Overall, the remarks reinforce the quantitative pattern of limited overall workload disruption, with AI functioning as a time-saver for some, a source of rework for others, and largely irrelevant (for now) to many.

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

Out of 75 music-sector respondents who answered this question, the largest group reports no change in the skills needed for their job (31; 41.33%). However, a substantial share already perceives skills impacts: 20 respondents say some upskilling is required (26.67%) and 11 report that entirely new skills are needed (14.67%). 13 respondents are not sure (17.33%).

Grouped together, those who perceive any skills change (upskilling or entirely new skills) make up 41.33% of the sample (31 people). This is exactly the same share as those reporting no change. This suggests a sector that is relatively split: while many music professionals do not yet see AI altering skill requirements, an equally large proportion already experience (or anticipate) clear shifts in the skills needed to do their work.



The remarks of our respondents closely match the quantitative picture of a split sector: many music respondents report no change in required skills, while an equally substantial group already sees or anticipates clear skill shifts. A first cluster describes AI as an increasingly relevant tool layer in studio, production, and workflow tasks. Respondents mention AI being used *“in the studio for mixing, mastering, and songwriting as a tool for demo production and as an idea generator”*, and some explicitly report adaptation: *“I have developed new working methods using artificial intelligence”* and *“I’ve obviously had to learn to use the AI software.”* Others emphasise contextual competence rather than blanket adoption: *“You have to know how to use it in the right situations. It would help me at work if I knew how to use artificial intelligence better.”* These remarks support the survey finding that a large minority already experiences upskilling or new-skill demands.

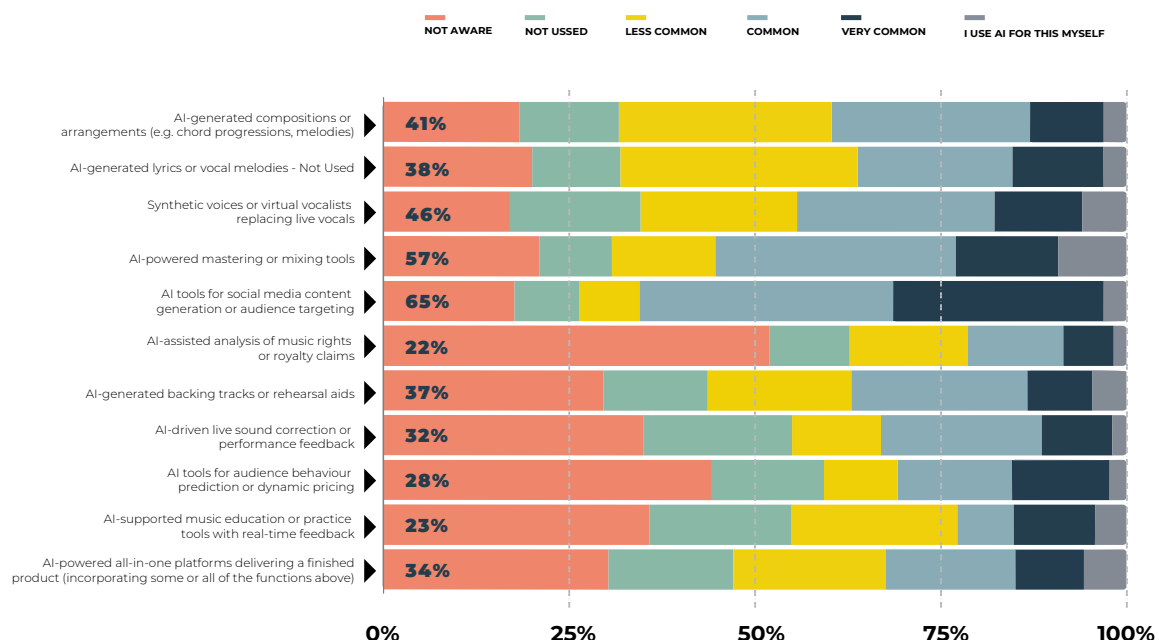
At the same time, many respondents distinguish sharply between technical/administrative uses of AI and core musical craft, especially performance and composition rooted in human interpretation. Several stress that their creative or teaching practice remains largely unchanged: *“For the moment I am not yet impacted by AI for my jobs”*, *“I have not seen any changes in my creative work”*, and *“I teach real students in real time with real sheet music and accompany them on a real piano.”* Similar boundaries are drawn in tradition-based and classical music contexts: *“I work largely with traditional or tradition-rooted music... [AI] has no place on the performance or creation of the music”*, and *“Classical music needs skilled musicians and computers are not even close to replicating string playing.”* This helps explain why *“no change”* remains the single largest response category.

A third recurring theme is that skills change often appears in adjacent areas (marketing, applications, social media, websites and technical support) rather than in musicianship itself. Respondents note that *“Social media requires more investment because the quality of social media has generally improved”*, that AI helps with *“writing projects’ applications and pitching for work”*, and even website building and marketing copy: *“AI was a really big help in designing my new website... it produced a great marketing text...”* (while also revealing limitations). These comments suggest that, for many music professionals, AI is changing the skill profile around the job (promotion, communication, digital administration) at least as much as the artistic core of the job.

The remarks also show strong ethical, pedagogical, and ecological resistance, which shapes whether respondents choose to develop AI-related skills at all. Some respondents are deliberately abstaining: *“I am purposefully avoiding AI at the moment because of its huge ecological impact and because most manifestations of it seem to be based on stealing existing work”*, and *“I have avoided direct contact with AI because I believe that it is fundamentally at odds with creation in all areas of art.”* Others frame AI as a threat to learning and skill formation in education: *“On the teaching front, I see it as threatening students’ ability to develop their skills and confidence, so I encourage them to not use it.”* This is important for interpreting the split in the data: the division is not only about exposure, but also about values and intentional non-adoption.

Finally, a smaller but clear set of remarks frames AI skills as becoming inevitable, regardless of current use. One respondent says directly: *“I think it’s inevitable it’ll be fundamental to everyone’s workflow. Essential we learn to use it.”* Another notes more cautiously that *“Of course, using AI also requires skills. Perhaps the skills will be oriented slightly differently when AI is involved.”* Taken together, the remarks suggest a music sector that is currently fractured: many professionals do not yet see any change in the skills required for their core practice, while others are already experiencing a shift toward AI-assisted production, technical workflows and digital self-management, and a third group is resisting that shift on principled grounds.

AI Awareness:



Among music professionals, AI tools are generally well known and widely used, with relatively few respondents reporting non-awareness. On average, 30% say they are not aware of a given application and 13.2% say it is not used, while 34.7% describe it as common or very common and 3.4% report that they use AI for it themselves.

The lowest use is perceived for AI tools for audience behaviour prediction, AI-supported music education or practice tools and AI-assisted analysis of music rights. For those items, less than 30% of the respondents think it's common or very common. The awareness about tools that can assist rehearsing is similar to what we see in the answers of actors (actors / dancers). There 25% see them as common or very common while 50% is unaware.

The highest reported awareness of use are AI tools for social media content generation, AI-powered mastering or mixing tools and Synthetic voices or virtual vocalists replacing live vocals. Only the first two are seen as common or very common by a majority of respondents (57-65%). The synthetic voices are perceived as common or very common by 45.6% of the music professionals, while 32.9 % thinks they are not used or are unaware of this use.

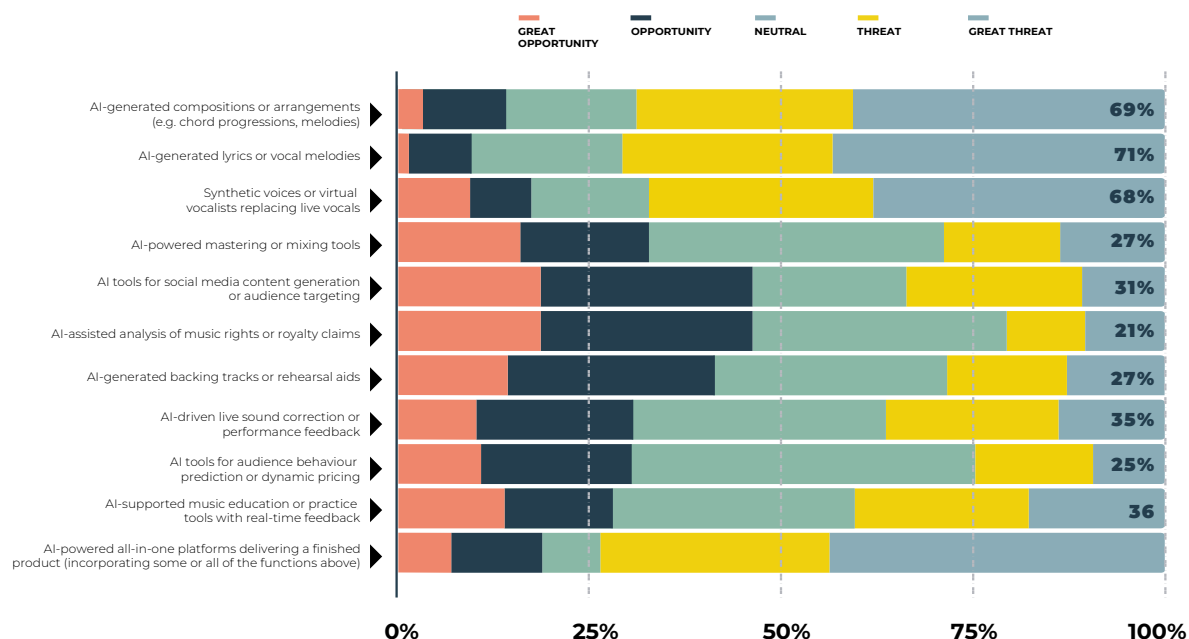
By contrast, awareness of more specialised or back-office tools is lower. AI-assisted analysis of music rights or royalty claims has the highest non-awareness (50.6%) and a lower common/very common share (21.5%), with 1.2% self-use.

AI-powered all-in-one platforms are in the mid-range: 31.6% not aware, 15.1% not used, 34.1% common/very common and 3.8% self-use. Overall, the table shows that, for music professionals, AI is already integrated into many everyday creative, production and promotional workflows, while more technical rights and pricing tools remain less widely known or used.

	USE	NOT AWARE
AI-generated compositions or arrangements (e.g. chord progressions, melodies)	41%	18%
AI-generated lyrics or vocal melodies - Not Used	38%	20%
Synthetic voices or virtual vocalists replacing live vocals	46%	16%
AI-powered mastering or mixing tools	57%	20%
AI tools for social media content generation or audience targeting	65%	18%
AI-assisted analysis of music rights or royalty claims	22%	51%
AI-generated backing tracks or rehearsal aids	37%	30%
AI-driven live sound correction or performance feedback	32%	38%
AI tools for audience behaviour prediction or dynamic pricing	28%	47%
AI-supported music education or practice tools with real-time feedback	23%	41%
AI-powered all-in-one platforms delivering a finished product (incorporating some or all of the functions above)	34%	32%

On the members side, music professionals together with journalists report the highest awareness of AI use in their sector. The average “use” awareness in music is 38% and 39% in journalism, while other actors report 24% use and crew members just under 14%. Linked to this are quite low “not aware” averages of 30% in music & 26% for journalism compared to 53% and 58% for other actors & crew.

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 compositions or arrangements (e.g. chord progressions, melodies)	69%	20%	11%
AI-generated lyrics or vocal melodies	71%	23%	7%
Synthetic voices or virtual vocalists replacing live vocals	68%	19%	13%
AI-powered mastering or mixing tools	27%	40%	33%
AI tools for social media content generation or audience targeting	31%	24%	45%
AI-assisted analysis of music rights or royalty claims	21%	33%	45%
AI-generated backing tracks or rehearsal aids	27%	32%	41%
AI-driven live sound correction or performance feedback	35%	33%	32%
AI tools for audience behaviour prediction or dynamic pricing	25%	43%	32%
AI-supported music education or practice tools with real-time feedback	36%	33%	31%

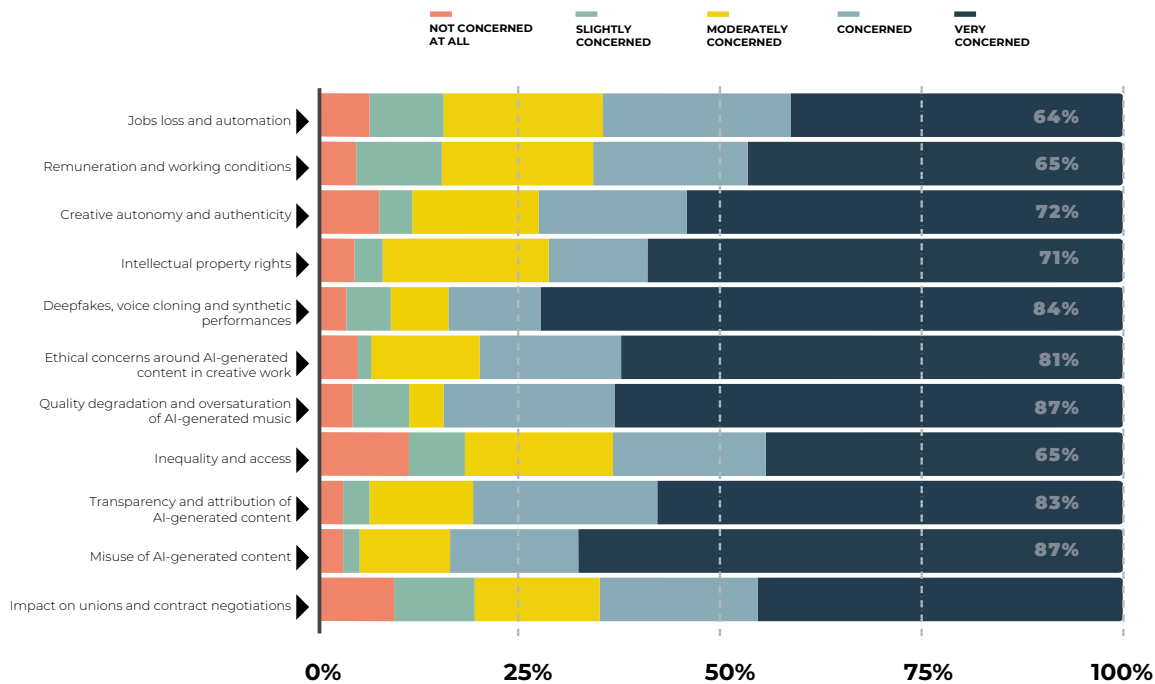
AI's impact on music creation is strongly divided between tools that affect the core of artistic creativity and those that play a more supportive, enabling role. The survey results show that the strongest threats are linked to generative applications that directly imitate or replace human artistic expression: AI-generated lyrics or vocal melodies (71% threat perception), AI-generated compositions or arrangements (69%), and AI-powered all-in-one production platforms (75%). These tools provoke deep concern about creative displacement, authorship, and the erosion of musical originality. They are seen as undermining the artistic identity of composers, lyricists and actors, blurring the line between genuine human creation and algorithmic output.

In contrast, tools that support rather than substitute human creativity are perceived far more positively. Respondents see opportunity in applications that enhance efficiency, access and fairness rather than redefining the essence of artistic work. AI-assisted analysis of rights and royalties (45% opportunity), AI tools for social media content and audience targeting (45%), and AI-generated backing tracks or rehearsal aids (41%) are all viewed as enablers that strengthen the ecosystem around creativity. They can assist musicians in managing their careers, connecting with audiences, and developing their skills without threatening the integrity of the creative process itself.

This contrast suggests that the acceptability of AI in music depends less on the technology itself than on where it intervenes in the creative chain. When AI replaces the generative moment of making art, it is perceived as a threat. When it acts as a facilitator — easing production, education or distribution — it becomes a valuable ally. The critical challenge for the sector will therefore be to set ethical and professional boundaries that protect the autonomy of artistic creation while harnessing AI's potential for fairness, accessibility, and creative support.

Concerns

Across all dimensions, respondents report high levels of concern about AI's impact on the music sector, but their worries cluster around a few core themes. First, there is a strong fear that AI will undermine the economic and professional foundations of musical work: majorities are concerned or very concerned about job loss and automation (64%), remuneration and working conditions (65%), and the impact on unions and contract negotiations (67%). These numbers indicate that AI is seen not only as a technological issue, but as a labour and power issue that may further weaken the bargaining position of musicians and music workers in an already precarious field.



	CONCERNED	NEUTRAL	NOT CONCERNED
Job loss and automation	64%	19%	17%
Remuneration and working conditions	65%	17%	17%
Creative autonomy and authenticity	72%	16%	12%
Intellectual property rights	71%	23%	7%
Deepfakes, voice cloning and synthetic performances	84%	8%	8%
Ethical concerns around AI-generated content in creative work	81%	13%	5%
Quality degradation and oversaturation of AI-generated music	87%	4%	9%
Inequality and access	65%	19%	16%
Transparency and attribution of AI-generated content	83%	12%	5%
Misuse of AI-generated content	87%	9%	4%

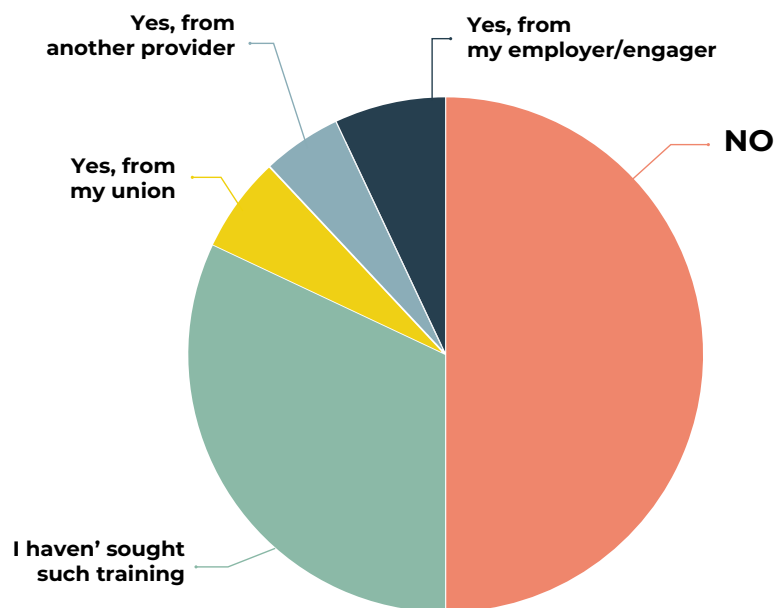
A second cluster of concerns focuses on authorship, integrity, and abuse of AI content. Very high concern levels around intellectual property rights (83% concerned/very concerned), deepfakes, voice cloning and synthetic performances (84%), and the misuse of AI-generated content (87%) show that respondents fear both economic dispossession and reputational or ethical harm. These worries are reinforced by anxieties about quality degradation and oversaturation of AI-generated music (86%) and about creative autonomy and authenticity (72%), suggesting that musicians are deeply worried that a flood of synthetic, low-cost content will crowd out human-made music, blur the line between real and fake, and erode the value and distinctiveness of artistic work.

Finally, respondents warn that AI could make existing problems in the industry worse, by deepening inequalities and making how things work even less transparent. High levels of concern are reported around ethical issues in AI-generated creative work (81%), transparency and attribution of AI-generated content (83%), and inequality and access (65%). This points to fears that powerful actors (large platforms, labels and tech companies) will gain even more control over data, markets and distribution, while independent and smaller players lack the tools, data access or negotiating power to participate on fair terms. In sum, the perceived threats are not only about the tools themselves, but about how AI intersects with existing structures of income distribution, rights management, and governance in the music ecosystem.

Training & support

•• Training

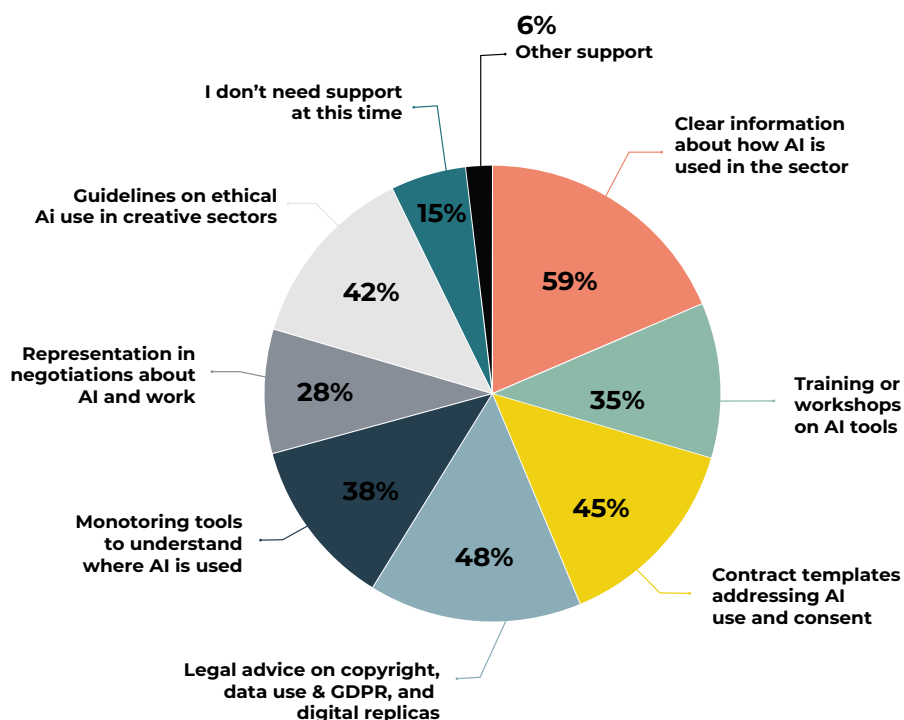
The vast majority of music professionals declare having received or sought no training related to AI. Of the few respondents who did receive training, 5 declared that their union gave this training, 4 got it from their employer, and 8 from another organization.

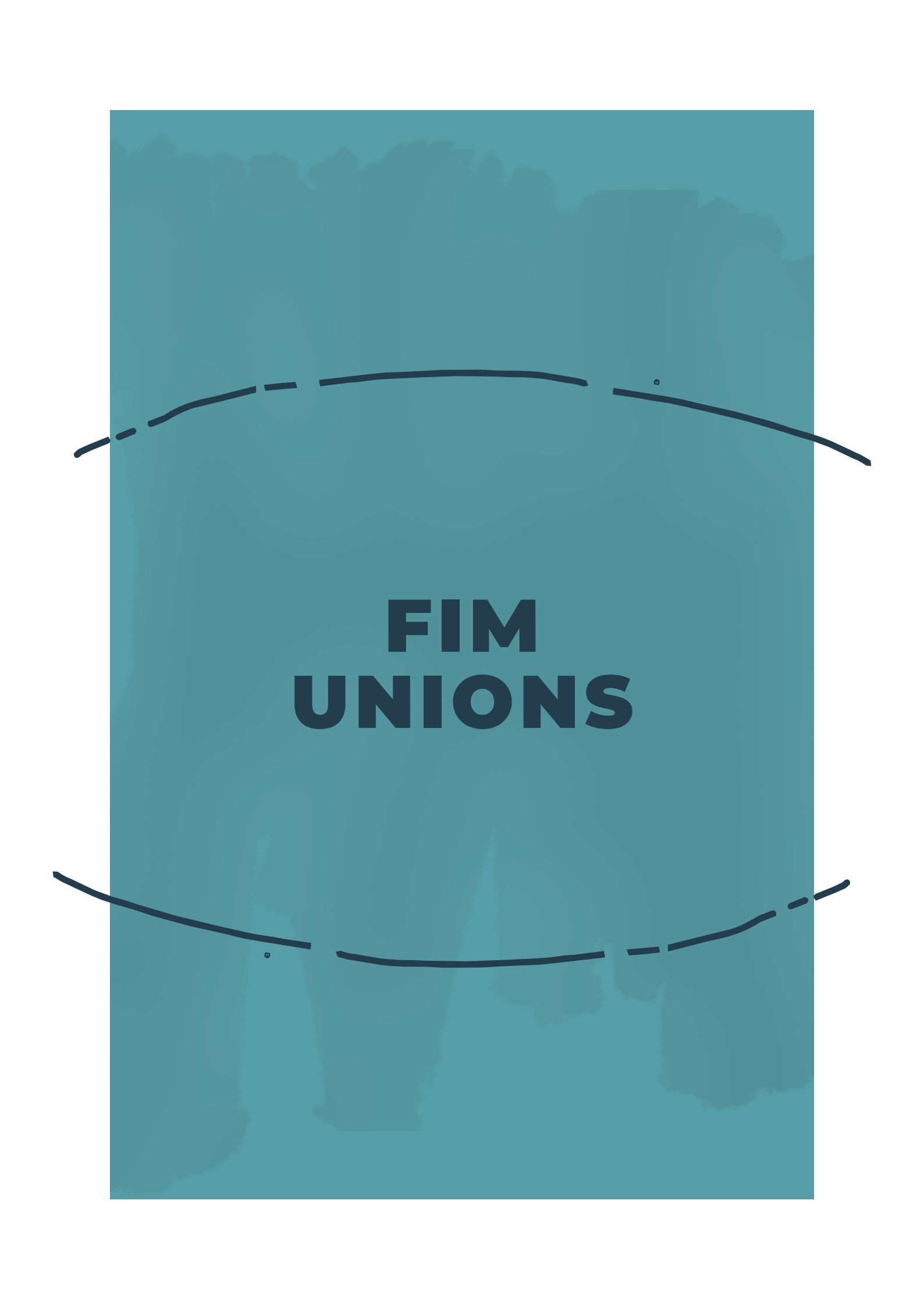


•• Support

We look now at the support relating to AI that music professionals would like to get. Clear information is the number one item sought - just as we saw in other sectors. Third and second in line are legal advice (48%) and contract templates (45%). 15% of the respondents said they don't need support at this time.

In the open answers, there was one respondent who was looking for *"Legislation to stop AI companies ripping off existing work by human artists without payment. Progress and 'everybody else is doing it' is no excuse for stealing."* Others explained that their answers on support are more precautionary than immediate need: *"Even if I don't need support as I am not directly impacted for the moment, I still would apply for all of the above mentioned just for the purpose of staying informed."* and *"I have ticked them out of interest rather than a need to use it. As I work with Collaborators as a mentor in some cases, I need as much information as possible, especially if a collaborator was disguising ai or plagiarising"*.



The background is a solid teal color. At the top, there are faint, stylized white clouds. Two dark teal curved lines, resembling arcs or parts of a circle, are positioned horizontally across the page. One arc is in the upper half, and the other is in the lower half. They are slightly offset from each other.

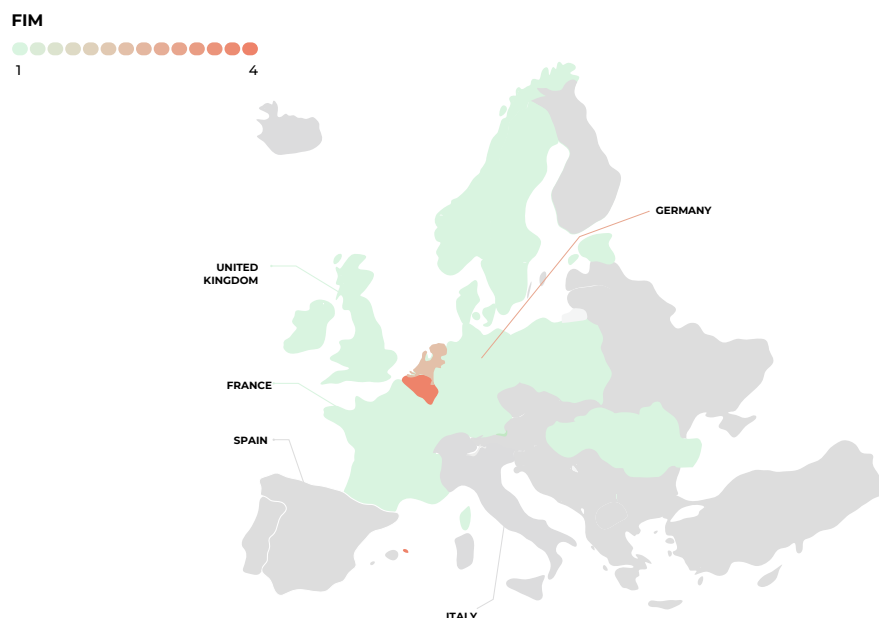
FIM UNIONS

Respondents: 17 musicians' unions

Geographical Focus: 14 European countries

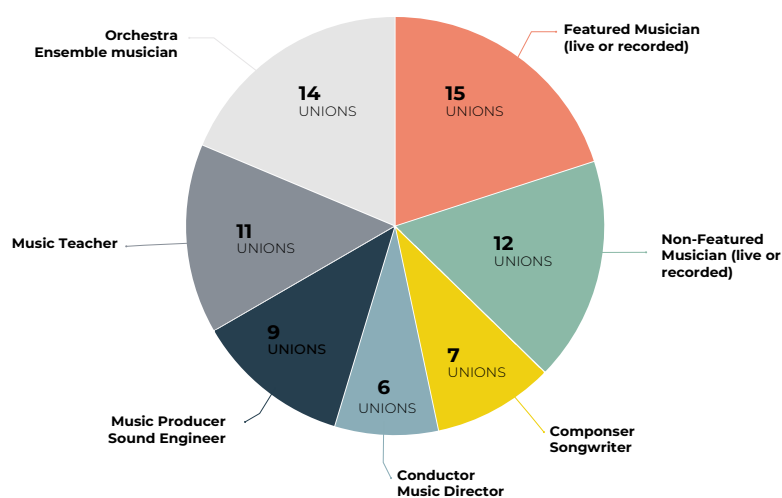
Federation: FIM (International Federation of Musicians)

Profile of the Unions: Who represents the Musicians?



Responding unions are active in Iceland, Belgium (3 unions), France, Romania, Hungary, Denmark, Sweden, Ireland, Netherlands (2 unions), Poland, Norway, United Kingdom, Germany and Georgia.

They mainly represent featured musicians (15 unions), orchestra/ensemble musicians (14), non-featured musicians (12), music teachers (11), music producers/sound engineers (9), composers/songwriters (7) and conductors/music directors (6).

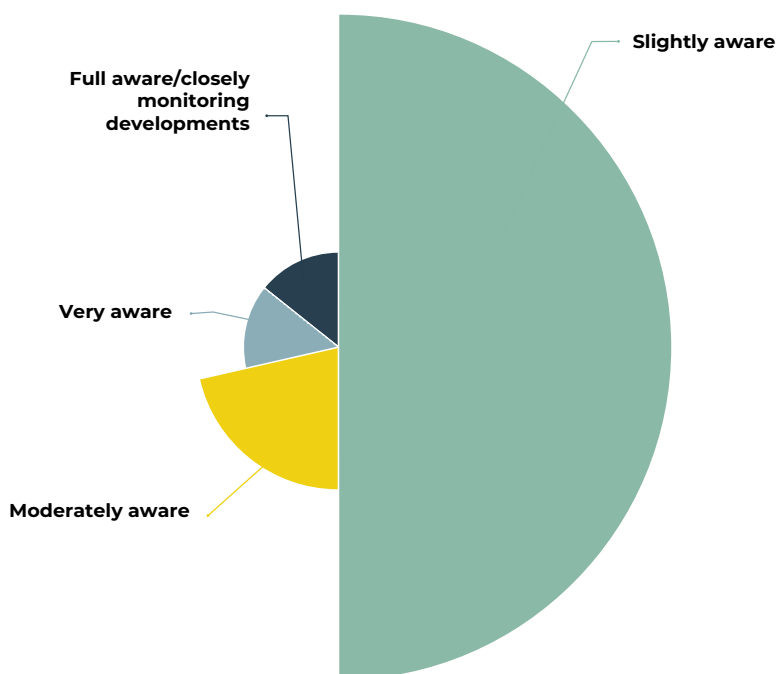


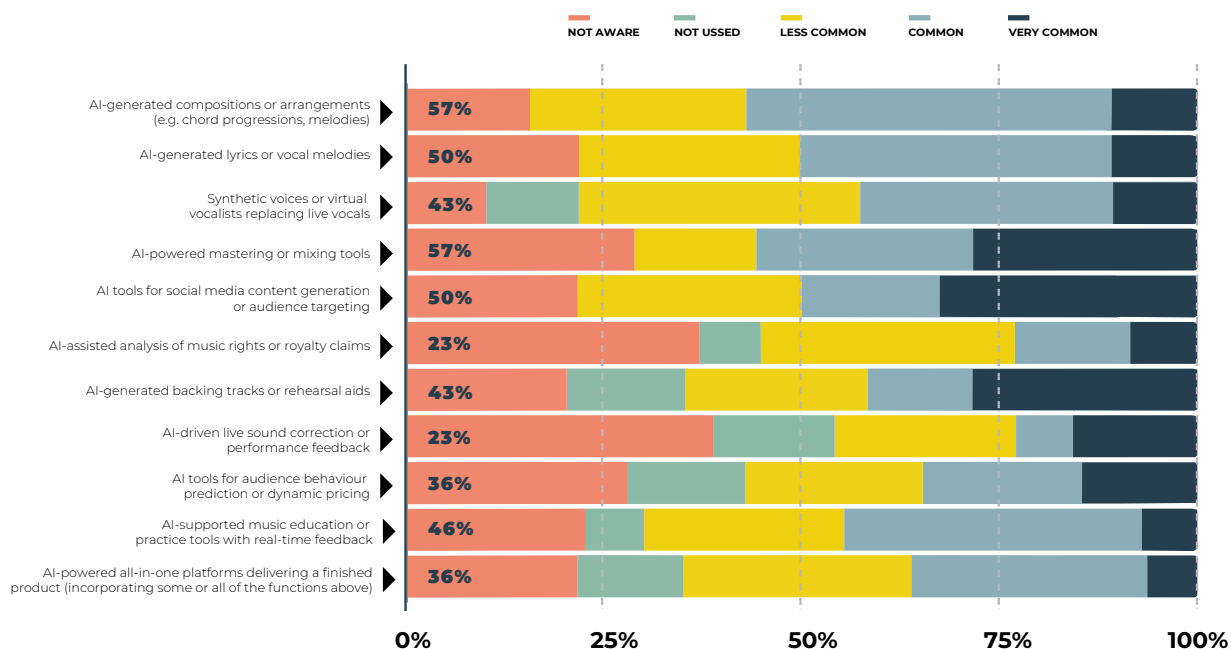
Three unions have 0–250 members, and three have 251–500 members, while two have 501–1000 members, and three have 1001–1500, 1501–2000, and 2001–3000 members, respectively. Two unions fall in the 3001–5000 range, and four very large unions have more than 5001 members.

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

AI Awareness

Most responding musicians' unions already have at least some awareness of AI use in their sector. None describes itself as “not at all aware”; instead, 7 are slightly aware, 3 moderately aware, 2 very aware, and 2 say they are fully aware / closely monitoring developments.





Across the responding musicians' unions, AI tools are no longer marginal experiments but are becoming embedded in multiple stages of musical work, from composition to promotion, albeit with uneven depth and speed. Overall awareness is relatively high: for most tools, a clear majority of unions know about their existence, with "not aware" answers averaging around 25% and peaking mainly in more technical or data-heavy areas such as rights/royalty analytics, audience prediction, and real-time feedback systems. At the same time, outright non-use is low (around 7% on average), which suggests that in virtually every category there are at least some concrete, ongoing use cases among members, even if these are not yet mainstream.

The strongest adoption appears around tools that dovetail with existing workflows and skills. AI-generated compositions and arrangements, AI-generated lyrics and vocal melodies, and AI-powered mastering and mixing all show relatively high shares of "common" and "very common" use, indicating that they are increasingly treated as standard creative or technical aids rather than unconventional add-ons. These tools plug directly into songwriting, demo production, and studio post-production, where time pressure and cost constraints are already strong, making efficiency and idea generation obvious advantages.

All-in-one platforms that combine several of these functions into a near-finished product are still less dominant than single-purpose tools but nevertheless reach a notable "common" level (29%). Their adoption signals an emerging shift towards more integrated AI pipelines in which composition, arrangement, production and basic promo tasks can be partially automated or heavily assisted within one environment. Unions' awareness of these platforms, combined with their perception as significant rather than marginal tools, underlines a medium-term risk that some parts of the value chain (especially lower-budget, lower-margin work) could be compressed into fewer human roles.

	USE	NOT AWARE
AI-generated compositions or arrangements (e.g. chord progressions, melodies)	57%	14%
AI-generated lyrics or vocal melodies	50%	21%
Synthetic voices or virtual vocalists replacing live vocals	43%	14%
AI-powered mastering or mixing tools	57%	29%
AI tools for social media content generation or audience targeting	50%	21%
AI-assisted analysis of music rights or royalty claims	23%	38%
AI-generated backing tracks or rehearsal aids	43%	21%
AI-driven live sound correction or performance feedback	23%	38%
AI tools for audience behaviour prediction or dynamic pricing	36%	29%
AI-supported music education or practice tools with real-time feedback	46%	23%
AI-powered all-in-one platforms delivering a finished product (incorporating some or all of the functions above)	36%	21%

Taken together, the profile that emerges is one of layered adoption: widely used creative and production tools at the core, growing but still uneven use in promotion and workflow integration; and more tentative, niche experimentation with rights, markets and tools for audience behaviour prediction or dynamic pricing. For unions, this implies that safeguarding members' interests will require action on several fronts at once: supporting practical upskilling around the tools that are already common; monitoring how all-in-one systems might reconfigure whole workflows; and building expertise on the more technical, data-driven applications that may silently reshape earnings, audience access, and evaluation of artistic work.

Perception

Across all AI applications, musicians' unions tend to see more risk than upside, especially where human performance could be replaced. For almost every tool, the combined share of "threat" and "great threat" is higher than the combined "opportunity" and "great opportunity", with an average of about 27% "threat" and 23% "great threat" versus 22% "opportunity" and 4% "great opportunity". The highest concern levels concentrate around AI-generated compositions/arrangements, synthetic voices/virtual vocalists, and AI all-in-one platforms, each with 54% rating them as a "great threat", reflecting fears of direct substitution of human creativity and performance.

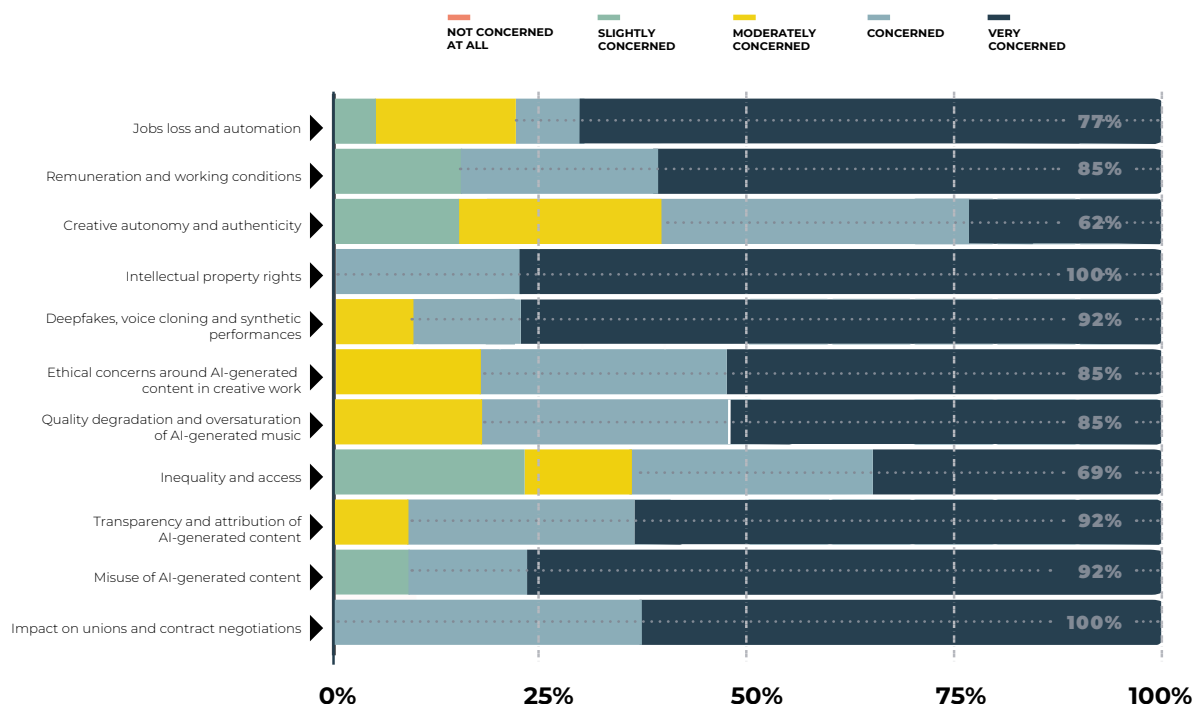


By contrast, some assistive or back-office tools are viewed more positively. AI-powered mastering/mixing, applications such as rights/royalty analysis and social-media/targeting tools attract the highest “opportunity” scores (up to 54% for social media and 62% for royalty analysis), suggesting they are perceived as supportive rather than substitutive, helping with efficiency, promotion and access rather than replacing musicians outright. Applications such as audience prediction/dynamic pricing are more often rated as neutral, indicating uncertainty about their long-term implications or a sense that they sit one step removed from core artistic work. Education/practice tools show more diverse results: 31% see it as an opportunity or great opportunity, and 46% see it as a threat or great threat, with 23% of the unions giving a neutral response.

	OPPORTUNITY	NEUTRAL	THREAT
AI-generated compositions or arrangements (e.g. chord progressions, melodies)	0%	15%	85%
AI-generated lyrics or vocal melodies	0%	23%	77%
Synthetic voices or virtual vocalists replacing live vocals	0%	23%	77%
AI-powered mastering or mixing tools	38%	23%	38%
AI tools for social media content generation or audience targeting	54%	15%	31%
AI-assisted analysis of music rights or royalty claims	62%	23%	15%
AI-generated backing tracks or rehearsal aids	38%	23%	38%
AI-driven live sound correction or performance feedback	23%	31%	46%
AI tools for audience behaviour prediction or dynamic pricing	31%	46%	23%
AI-supported music education or practice tools with real-time feedback	31%	23%	46%
AI-powered all-in-one platforms delivering a finished product (incorporating some or all of the functions above)	8%	23%	69%

Concerns

Musicians' unions report consistently high levels of concern across all listed AI risks, with virtually no respondents unconcerned. For every issue, 0% select "not concerned at all", and only small minorities choose "slightly" (on average 6%) or "moderately" (on average 8%) concerned; the dominant categories are "concerned" (24%) and especially "very concerned" (61%).



The strongest worries cluster around intellectual property, identity, and core labour conditions: 77% are very concerned about intellectual property rights (the rest, 23%, are also concerned), deepfakes/voice cloning/synthetic performances (15% are also concerned), and misuse of AI-generated content (likewise, 15% are also concerned), while 69% are very concerned about job loss and automation, transparency and attribution, and the overall impact on unions and contract negotiations.

Remuneration and working conditions also score extremely highly (62% very concerned), showing that unions see AI as tightly linked to pay, security and bargaining power. Concerns about creative autonomy, ethical issues, quality degradation/oversaturation of AI music, and inequality and access are likewise substantial, with roughly half or more of unions "very concerned" in each case, indicating that artistic integrity and fairness are seen as under pressure alongside employment and rights.

	CONCERNED	NEUTRAL	NOT CONCERNED
Job loss and automation	77%	15%	8%
Remuneration and working conditions	85%	0%	15%
Creative autonomy and authenticity	62%	23%	15%
Intellectual property rights	100%	0%	0%

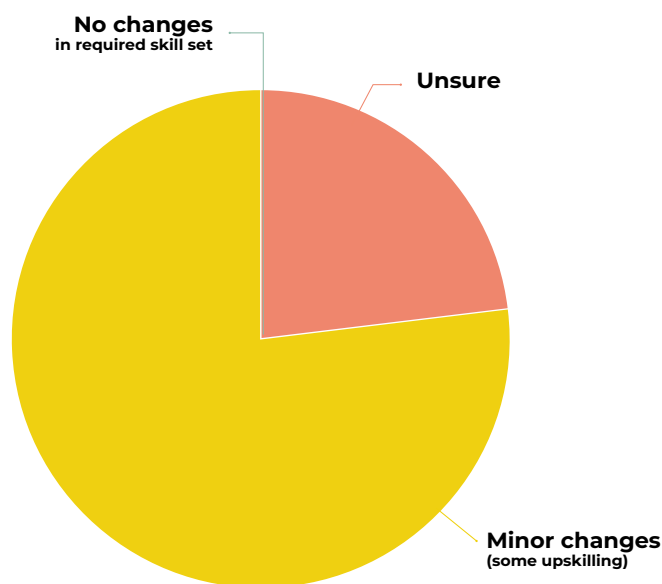
Deepfakes, voice cloning and synthetic performances	92%	8%	0%
Ethical concerns around AI-generated content in creative work	85%	15%	0%
Quality degradation and oversaturation of AI-generated music	85%	15%	0%
Inequality and access	69%	8%	23%
Transparency and attribution of AI-generated content	92%	8%	0%
Misuse of AI-generated content	92%	0%	8%
Impact on unions and contract negotiations	100%	0%	0%
Average	85%	8%	6%

In their explanation, the FIM unions' responses express deep concern that AI undermines both copyright and the basic economic viability of musicians' work. They warn that low-effort AI systems can saturate platforms with cheap content, weaken remuneration models, and side-step existing rights frameworks. As one union puts it, ***"AI requires little effort and know-how, which risks flooding the market with AI-generated material. The platforms (e.g. Spotify) use the Pro Rata remuneration model, which dilutes the remuneration when large amounts of AI-generated music are uploaded. We see a danger that many copyright rules will be thrown out of play. (e.g. Deep fake)."***

Several unions highlight that information is still limited, but the direction of travel is worrying, particularly around inequality and income. One statement captures this uncertainty and anxiety: ***"Again the information we have is minimal. We are concerned though that the impact will drive inequality for musicians. There has been a lot of talk lately of how AI-generated music will affect our members and this is a huge area of concern as it may affect earnings. We would also be hugely concerned as to how this would affect their property rights."***

The strongest worries concern uncompensated use of members' music for training and the way existing contracts and copyright law may fail to protect creators. One union spells this out in detail: "Music created by MU members is being used by AI developers commercially to make a profit for themselves, without the knowledge of those members, without their consent and without them receiving any share of the income generated. This cannot continue — the principle of copyright is that the original creator's permission needs to be sought in order for a musical work to be used to generate profit, and where that permission is granted, the creator should receive fair remuneration for it. If current copyright law doesn't adequately achieve this in relation to AI training, then it needs to be updated to do so." They go on to stress how broad contracts enable labels and publishers to license works to AI without meaningful consent from artists and how this combines with the sheer productive capacity of AI to displace work: ***"AI systems, once trained, have the capability of churning out a significant volume of new musical works. They can be working 24/7 and don't need time or experience to generate creativity. There is potential for all musical markets to be flooded with AI-generated content."*** This leads one union to summarize the overall picture starkly: ***"Intellectual property rights are from our opinion under severe threat from AI."***

Impact on skills and jobs

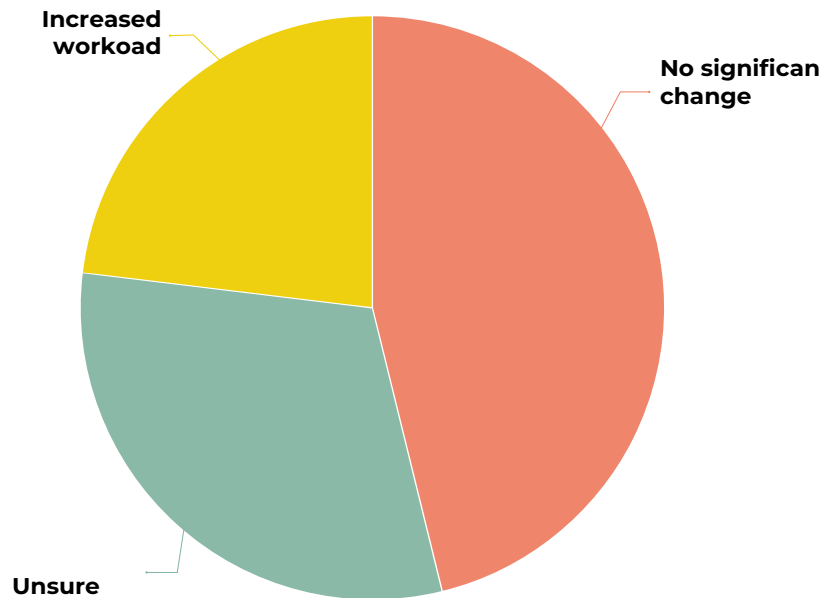


If we look at the survey data, we see that FIM unions don't see major changes in the skill needed. They are either unsure or only expect minor changes.

Upon reading the open answers, we see that unions emphasize that, despite rapid technological change, the core appeal of live performance and musicians' fundamental skills remains intact. One response argues that *"AI has limitations that makes/will make audiences go to live playing for quality and the experience. However certain musicians will be able to compensate for their limitations and create certain work opportunities through AI use. Many capable musicians know how to work with AI and are finding use for AI as an aide."* Others expect the impact to be uneven across styles and genres, noting that *"acoustic and live performances will likely be less affected, as will classical music"* and that for many live actors *"the situation doesn't change that much, but even more so for a music producer. For a DIY, it may be necessary to learn the technique to 'reach through the noise'."*

At the same time, there is clear unease about the scale and direction of change, coupled with a lack of concrete information and public debate in some countries. One union writes, that *"it is difficult for us to assess this impact, as it depends heavily on musical styles"*, while another notes that *"our assessment is that there will inevitably be some changes to how our members operate as AI becomes more prevalent. It is not entirely clear how this will work at the moment as the level of discourse and feedback in Ireland is minimal. This depends on how large the impact of AI will be in the different sectors."* This uncertainty feeds into a broader sentiment captured succinctly as *"we are more afraid of seeing artists replaced by generative AI than of having to adapt to work with it."*

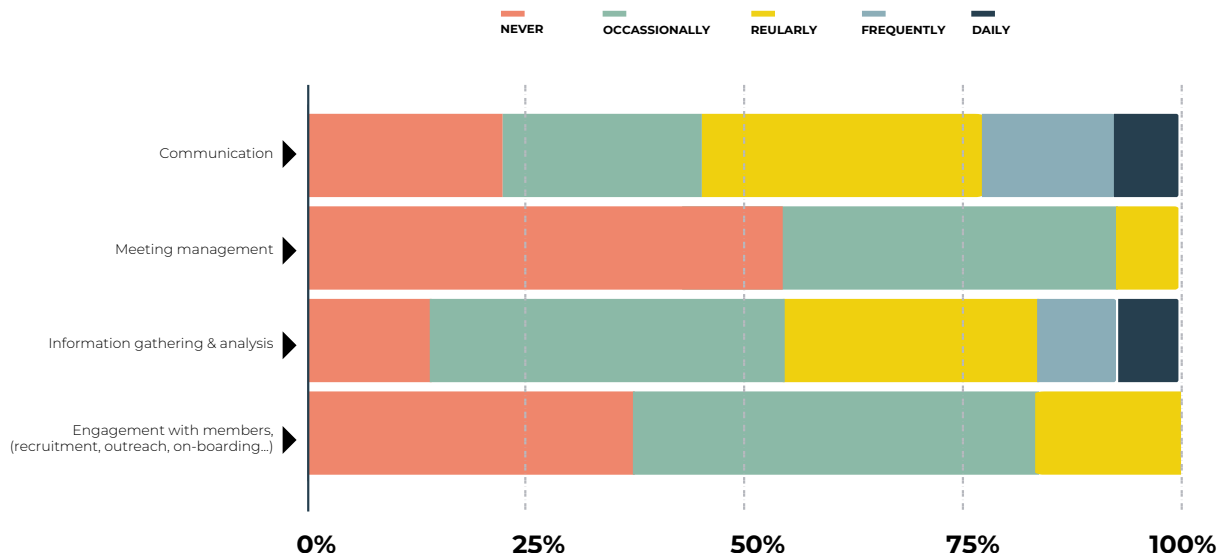
Several unions stress that the biggest adjustments for musicians will be on the business and rights side rather than in the core craft of making music. One response states that *"the main skills required to write / perform / record music will be unchanged"*, but that members will need to *"understand more about copyright and contractual clauses, to protect themselves from unwittingly agreeing for their work to be used by AI"* and to *"find uses of their work by AI and to obtain appropriate payment and to prevent further use if that is desired."* For those who actually use AI tools, new technical and ethical literacies are needed, including awareness of *"any requirements around use of other musicians' work baked-into the AI system they are using."* In the classical field, one union underlines that *"at the moment and in the foreseeable future, AI does not produce relevant content for classical orchestras"*, while also pointing to *"a great opportunity that has not yet been realized"* in areas like dynamic pricing, live feedback, and audience targeting.



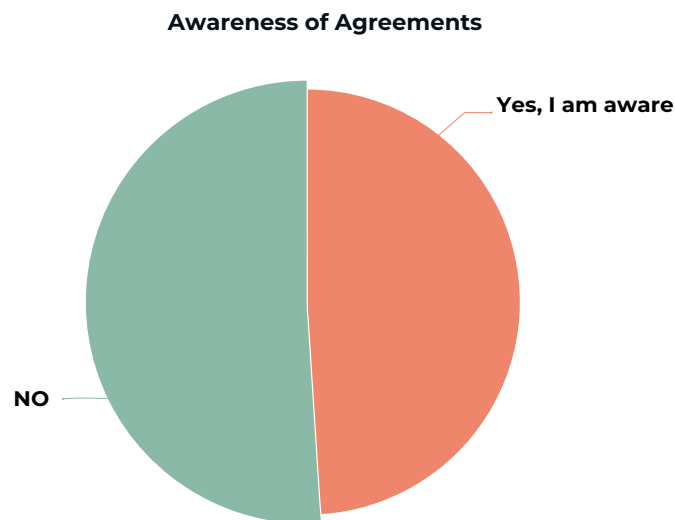
Musicians' unions describe AI's impact on workload and job opportunities as emerging but uneven across genres and roles. Some note continuity with earlier waves of computer-assisted music, saying that musicians had "already been driven out of studios and stages" and are now pushed ***"even further with the advent of AI tools"***, particularly where tasks like mixing, mastering, demo production and marketing are becoming easier and require less know-how, intensifying competition rather than clearly reducing total work. Others stress that it is ***"a little early to estimate"*** the overall impact, that it ***"varies a lot between different member groups"***, and that more local analysis is needed, especially since classical orchestras and choirs report ***"no major impact so far"***.

Several unions also highlight a visibility gap: they are ***"not seeing a significant number of incoming issues"*** about work displacement ***"yet"***, but suspect that members' work may already be shrinking without them realizing that AI is the cause. They add that major broadcasters and music companies in some countries have ***"yet to make any changes"*** towards large-scale AI adoption but warn that once this shifts, they ***"are likely to see a large number of members reporting issues"***, pointing to a potentially sharp rather than gradual uptick in workload and job-loss problems.

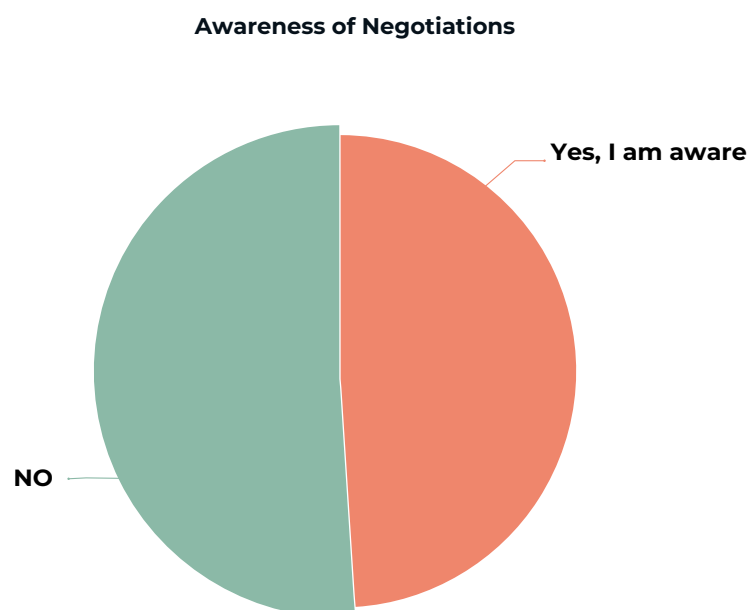
AI work



These figures indicate that musicians' unions are already using AI in internal work, but mainly for communication and information tasks rather than member-facing engagement. Around half never use AI for meeting management (54%), while use for communication and information gathering is more evenly spread across "never", "occasionally", and "regularly", and a substantial minority report at least occasional AI use for member engagement, though daily or frequent use remains rare in all four areas.

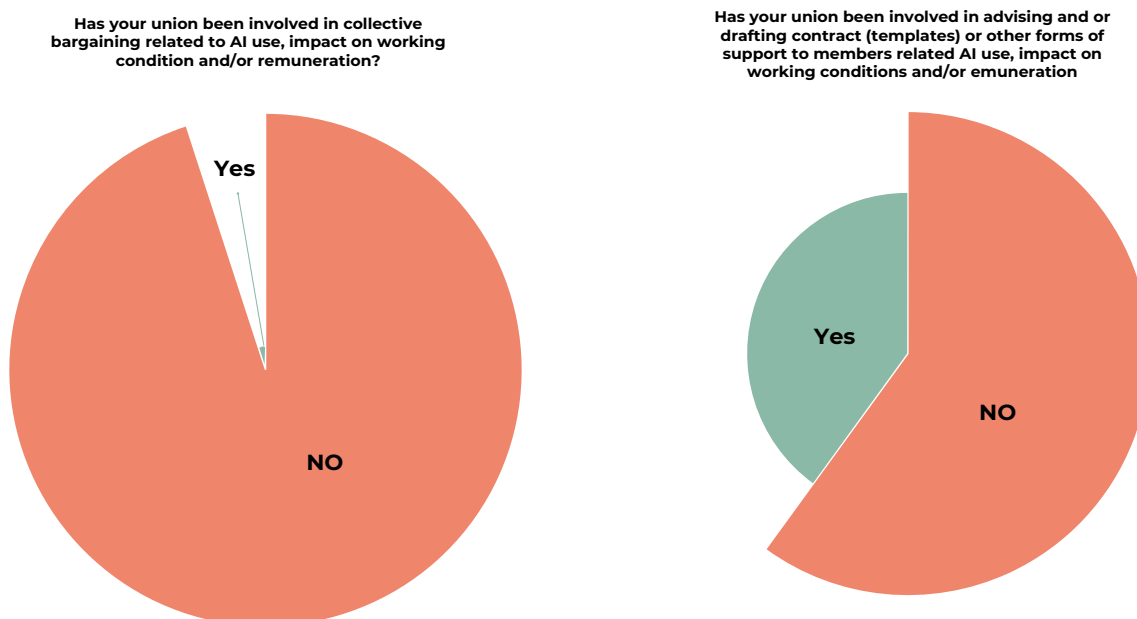


Musicians' unions report that AI is already on the table in several bargaining arenas, but concrete protections are uneven and still developing. Some highlight specific remuneration deals, such as a writers' association agreement with StoryTel that sets a 7% rate and ongoing efforts to align Nordic positions or negotiations by a national library over compensation for a public language model project that are still unfinished. Others **"regularly discuss"** AI with phonogram and audiovisual producers and note that AI has entered contract movements and some individual agreements, even when it is **"not yet included"** in sectoral collective agreements.



There are also examples of failed or partial attempts at AI protection. One union reports unsuccessfully trying to insert clauses into UK broadcaster agreements both to stop AI tracks replacing human music and to prevent broadcasters using human-made catalogues for AI training, illustrating the difficulty of securing binding limits on AI use even when unions are proactive.

In contrast, unions from countries with a less developed music sector state that they have *“not studied this topic so far”*, acknowledging AI risks but prioritising more immediate structural problems, which reinforces the idea of a highly uneven bargaining landscape across Europe. One union says *“Unfortunately situation around musical sphere in Georgia is less developed to be worried about AI although we understand the risks of Artificial Intelligence taking away jobs of many, but we still have other issues to deal with first, so we have not studied this topic so far”*.



Only a small minority of musicians' unions are currently dealing with AI in formal negotiations, but more are supporting members at contract level. Just 1 union reports involvement in collective bargaining on AI, compared to 12 that have not, while 5 unions have advised on or drafted AI-related contract templates or other support tools for members versus 8 that have not.

The British Musicians' Union shares an example of a contract clause on AI.

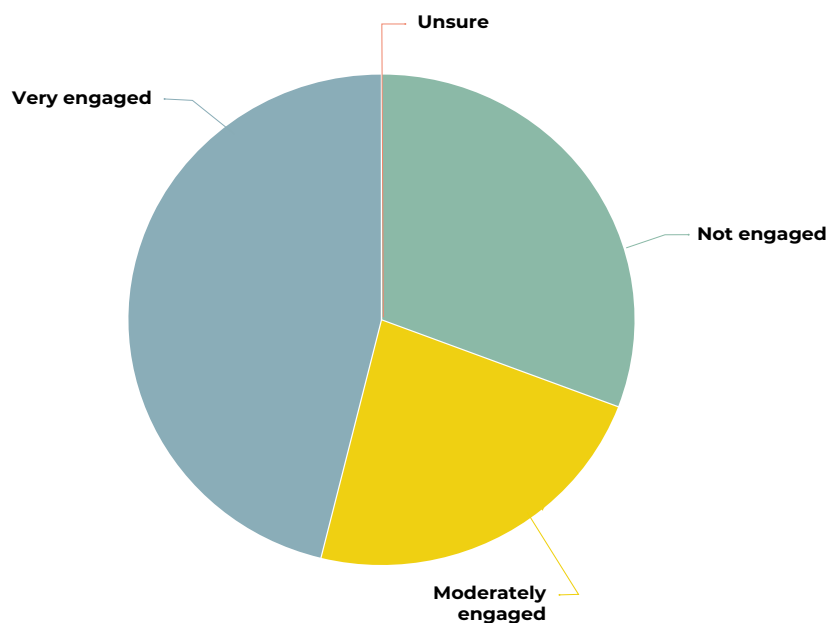
“Artificial Intelligence

No rights are granted for use of any sound or audiovisual recording, song, composition, musical performance or other creative content the [actor / composer] has created or contributed to under this agreement, for the purpose of training, fine tuning or otherwise developing or improving the capability of an Artificial Intelligence model.

Any intended licensing or direct use of such creative content for such use shall be subject to negotiation with the Union. Each instance of any such use not subject to agreement of the Union shall be an infringement of the [actor's / composer's] rights.

Broadcaster agrees to not use any Artificial Intelligence generated sound or audiovisual recording, song, composition, musical performance or other creative content within its broadcast or online output in substitution of human-generated content.”

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



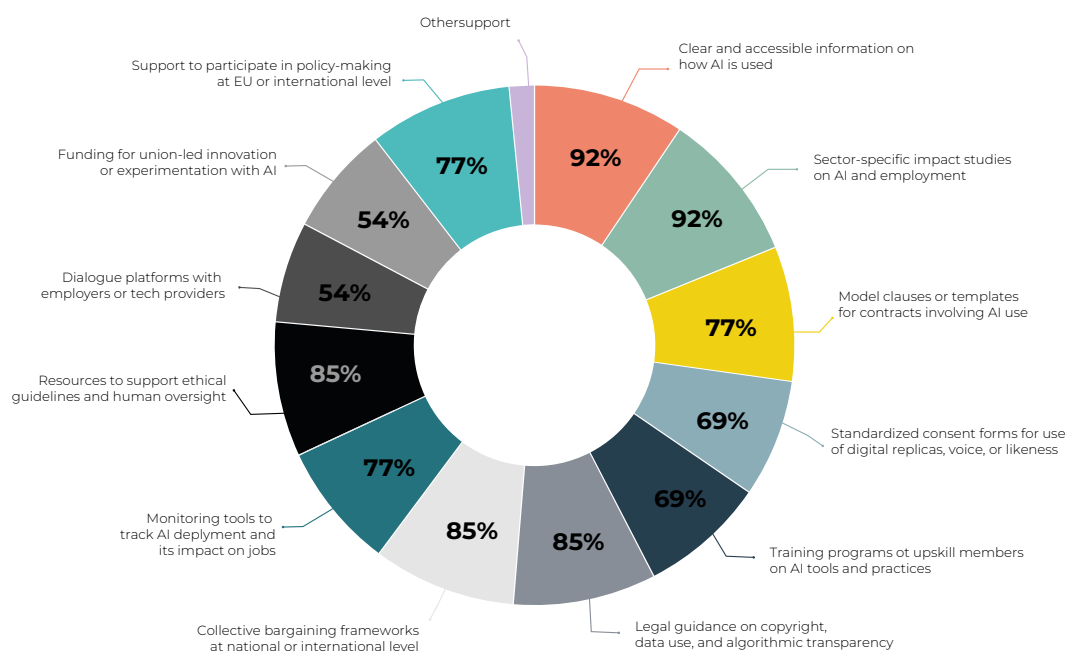
Some musicians' unions are already highly visible actors in national AI policy debates, especially around deepfakes and copyright. Examples include a union that initiated the process leading to the Danish government's "Deep Fake" proposals , another that regularly coordinates AI work with other Swedish cultural organisations under the KLYS umbrella, and the UK Musicians' Union, which continues to lobby its government on upcoming AI copyright proposals .

Support

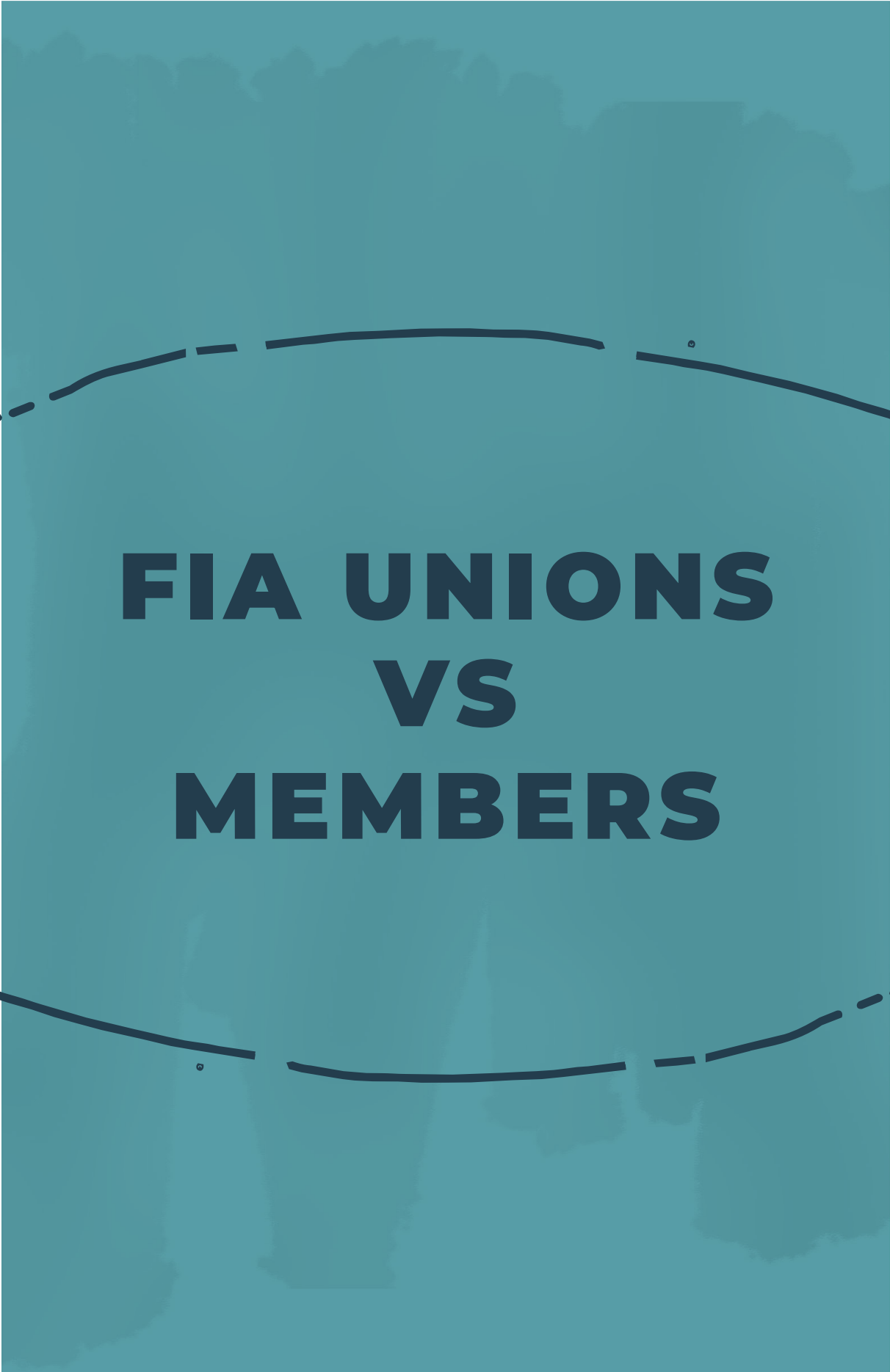
Musicians' unions report very strong and broad support needs around AI, with information, legal tools and bargaining frameworks at the top of the list. Almost all unions (92%) want clear, accessible information on how AI is used in their sector and sector-specific impact studies on AI and employment, while large majorities ask for legal guidance (85%), collective bargaining frameworks (85%), resources for ethical guidelines and human oversight (85%), and model contract clauses and monitoring tools (both 77%). Around two-thirds seek standardised consent forms for digital replicas, voice or likeness and training programmes to upskill members (69%), and just over half call for dialogue platforms with employers/tech providers and funding for union-led AI innovation (both 54%), alongside 77% who want support to participate in EU or international policy-making.

1 <https://hoeringsportalen.dk/Hearing/Details/70269>

2 <https://musiciansunion.org.uk/news/mu-continues-to-lobby-government-ahead-of-new-ai-copyright-proposals>



In addition to these items, unions also proposed other support. One suggested *“maintaining a human-run music production ecosystem seems to us to be a priority”*. And another added *“Coordination on the issue between EU countries is positive”*.



FIA UNIONS VS MEMBERS



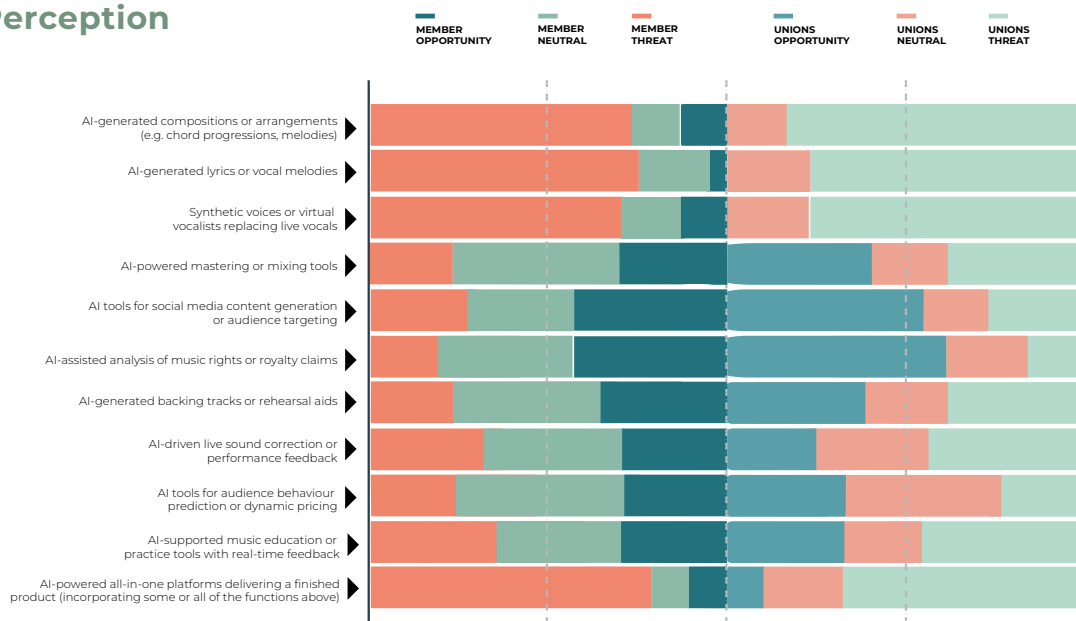
Awareness

Across most AI tools, music professionals and FIM unions describe a broadly similar picture: AI is already part of everyday practice, especially in supporting roles. For applications like AI-powered mastering and mixing, social media and audience-targeting tools, and AI-generated backing tracks, reported use by members and by unions converges relatively closely.

The clearest differences appear around “infrastructure” and learning-oriented tools. For AI-assisted analysis of rights and royalties, AI-supported music education tools, and AI systems for audience behaviour prediction or dynamic pricing, the “not aware” rates among music professionals are substantially higher than the unions’ estimates, sometimes by more than 10–15 percentage points. This suggests that unions, through their legal, policy and educational work, are more familiar with these less visible applications and their potential impact on contracts, revenue flows and touring strategies. Many individual musicians, by contrast, mainly notice the front-end tools they touch directly (plug-ins, practice apps, social media helpers) and may not yet recognise how strongly AI is entering the back-end of the value chain.

For core creative tools such as AI-generated compositions, lyrics and synthetic voices, the pattern is more mixed but still revealing. Use gaps here are modest and can be positive or slightly negative, indicating that unions tend to see these tools as present and growing but not yet dominant, while the professional data show a diverse landscape of early adopters, occasional experimenters and non-users. This aligns with other surveys in which a majority of producers report having tried generative AI, but often in hybrid workflows and without necessarily framing it as central to their identity as artists. Taken together, these findings indicate that there is no fundamental conflict between how unions and music professionals see AI: both acknowledge its growing role, especially in supportive functions, while unions have a somewhat wider radar for systemic and back-office uses that many musicians have not yet fully registered.

Perception

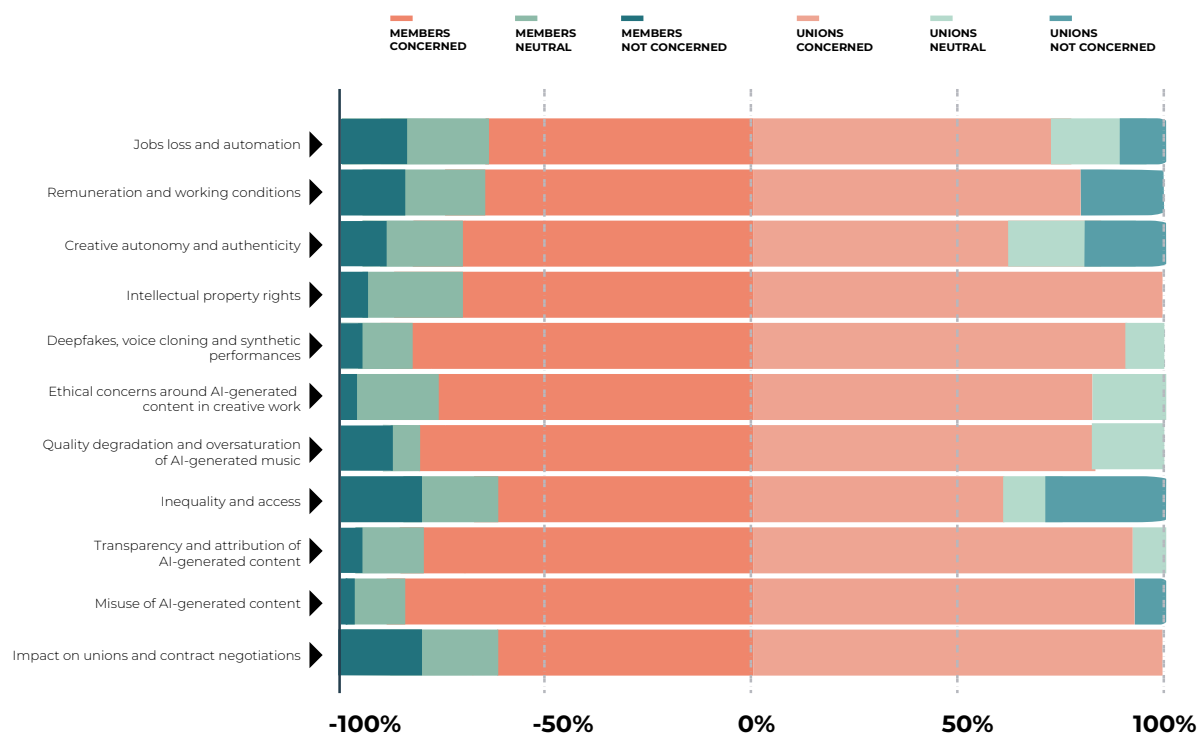


Across both surveys, AI in music is overwhelmingly perceived as a threat, especially when it touches the core of musical creativity and fully automated production. For AI-generated compositions, lyrics, synthetic voices and all-in-one platforms, large majorities of both music professionals and unions see these tools mainly as threatening rather than as opportunities, with threat scores in the range of two-thirds to more than three-quarters. This mirrors wider research showing that creators fear loss of income, erosion of artistic identity, and a flooding of the market with low-cost AI music that competes unfairly with human work. The small “threat gaps” here (generally under 20 percentage points) suggest that, on the level of core creativity, unions and individual professionals are remarkably aligned in their sense of risk.

The most striking differences in perception emerge around supporting and infrastructural tools, where unions tend to see more opportunity and somewhat less threat than individual professionals. For AI-powered mastering/mixing, social media and audience-targeting tools, and especially AI-assisted analysis of rights and royalties, unions are significantly more likely to classify these as opportunities (opportunity gaps of up to around 17 percentage points) and less likely to label them as outright threats. Music professionals, by contrast, remain more cautious: even for these “helper” tools, threat perceptions still outweigh opportunity in your data, reflecting broader anxieties that efficiency gains may come at the cost of jobs, bargaining power or creative distinctiveness. This suggests that unions, with their systemic view of how AI could improve transparency, enforcement and revenue distribution, are somewhat more optimistic about what can be achieved if governance and regulation are shaped in favour of creators.

A third pattern concerns education, live sound and audience analytics, where both groups sit closer to a “wait and see” stance. For AI-supported music education, live sound correction and audience behaviour/dynamic pricing, neutrality scores are relatively high and the gaps in neutrality between members and unions are small. Here, unions again lean slightly more towards opportunity (for example in education and rights analysis), while professionals remain more on the fence or see diffuse threat without concrete benefits yet. Taken together, these perception data show that there is no deep divide between unions and creators: both see generative AI aimed at core creative tasks as predominantly threatening, while unions are somewhat more inclined than individual professionals to recognise potential upside in AI tools that can support rights management, education, and smarter use of data.

Concern



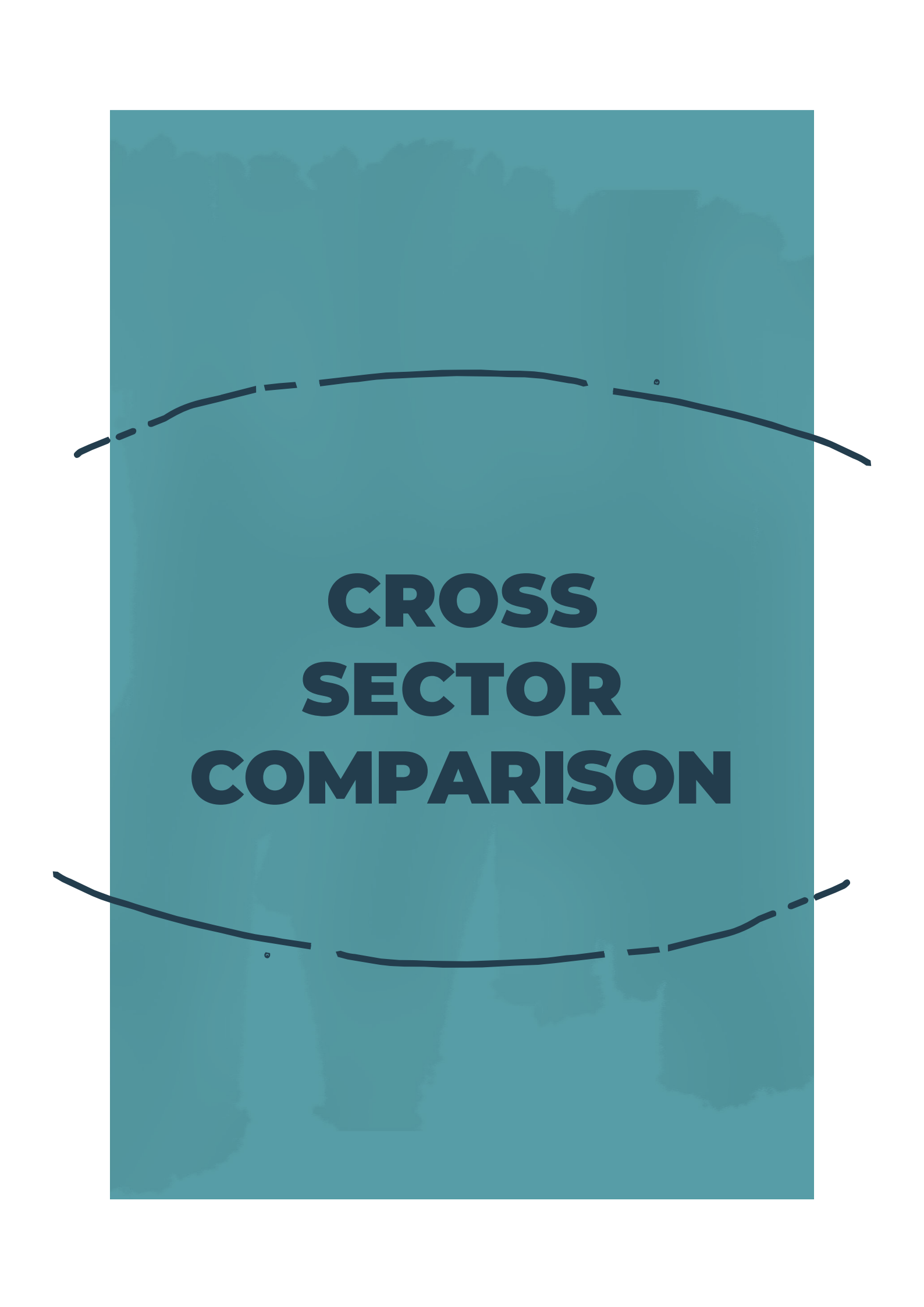
Both music professionals and FIM unions express very high levels of concern about AI, but unions are, on average, even more alarmed. For most issues, roughly two-thirds to more than four-fifths of members say they are concerned or very concerned, and unions often report concern levels that are another 5–30 percentage points higher. The biggest gaps appear around job loss and automation, remuneration and working conditions, intellectual property rights, and the impact on unions and negotiations, where unions repeatedly report near-unanimous concern. This fits wider sector research showing that creators see AI as a structural threat to their livelihoods and bargaining power, not just a technical change.

There is strong alignment on which issues matter most. Both groups rank deepfakes, voice cloning and synthetic performances, misuse of AI-generated content, and the degradation and oversaturation of AI music at the very top of their worry list, with concern levels consistently above 80%. Intellectual property rights, transparency and attribution, and ethical risks around AI-generated creative work also attract very high concern from both members and unions, again echoing broader surveys where the majority of musicians fear unlicensed training, loss of control over their work, and erosion of trust in what is “real” or human-made. In these domains, the “concern gaps” are small: unions and individual professionals are essentially sounding the same alarm, even if unions phrase it more in terms of legal frameworks and collective rights.

The main differences lie in how intensely unions frame certain threats and how little “not concerned” space they leave. For issues like intellectual property rights, transparency, misuse of AI content and the impact on unions and contract negotiations, unions report almost no respondents who are “not concerned”, while a small but visible minority of members still falls into that category. This suggests that unions, through their exposure to legal cases, policy debates and international reports, have a sharper sense of how quickly AI is reshaping rights, contracts and power relations in the background. Members, by contrast, may feel the pressure in their daily work but do not always see the full systemic picture — yet their overall concern levels are already so high that the difference is one of degree rather than direction.

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.

Introduction

The background is a solid teal color. Faint, light-colored silhouettes of people are visible in the background, particularly in the lower half. Two dark, curved lines, resembling stylized eyebrows or decorative elements, are positioned above and below the text.

CROSS SECTOR COMPARISON

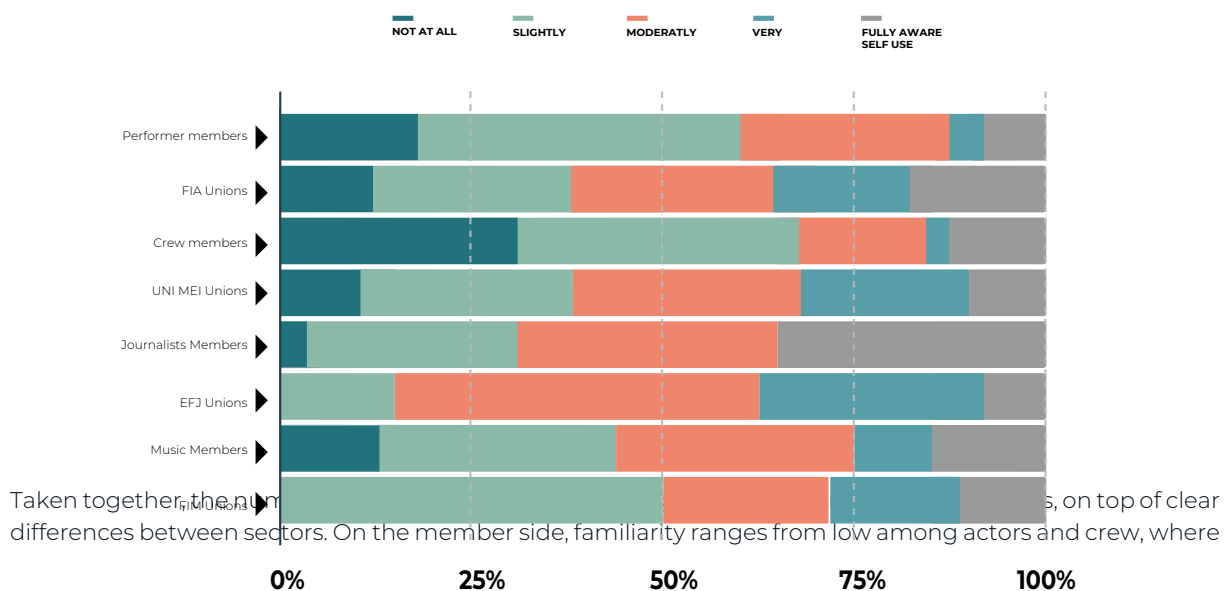
In this last part, we provide some general comparisons between the different sectors and the collected data of the union surveys and the national surveys for members. This chapter brings together the different strands of the study and looks across sectors to identify common patterns and divergences in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

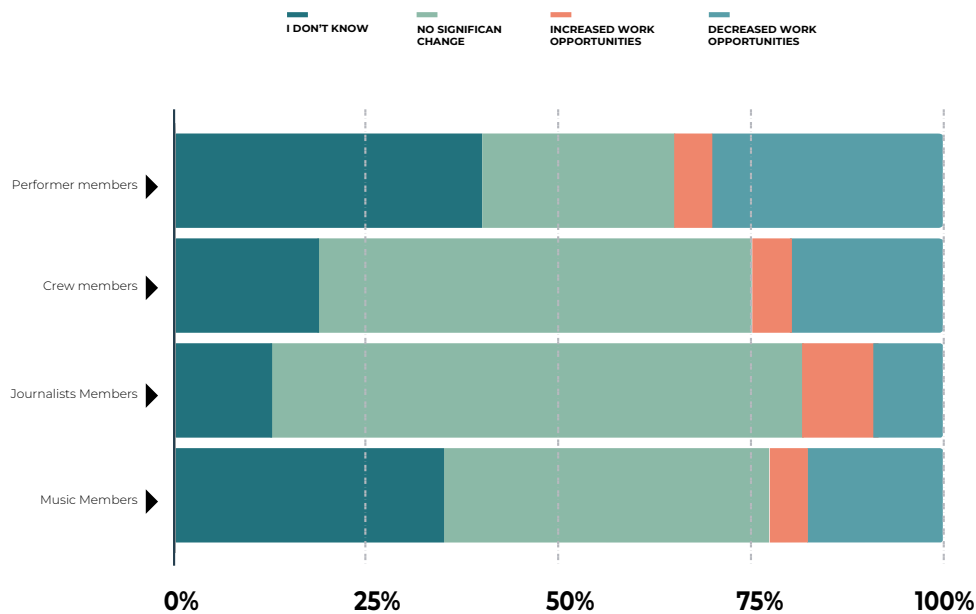
When we compare individual members with unions, a consistent awareness gap appears, although its size differs by sector. For actors (excluding musicians), around 56 percent of members surveyed are in the two lowest categories, while among FIA unions, only about 9 percent are not at all aware and roughly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



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.

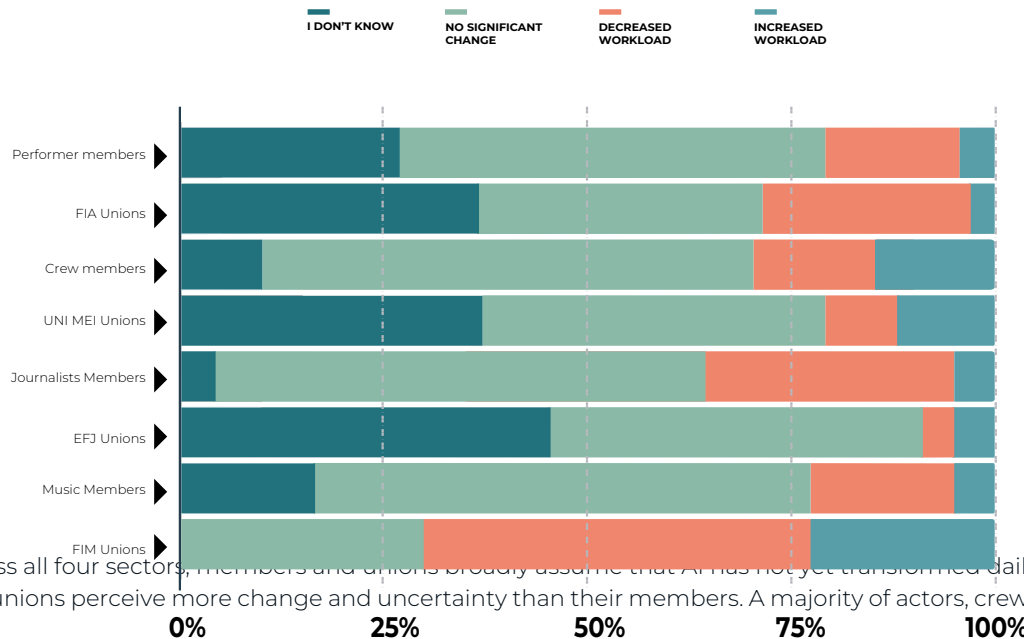
Expected impact of AI

•• 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



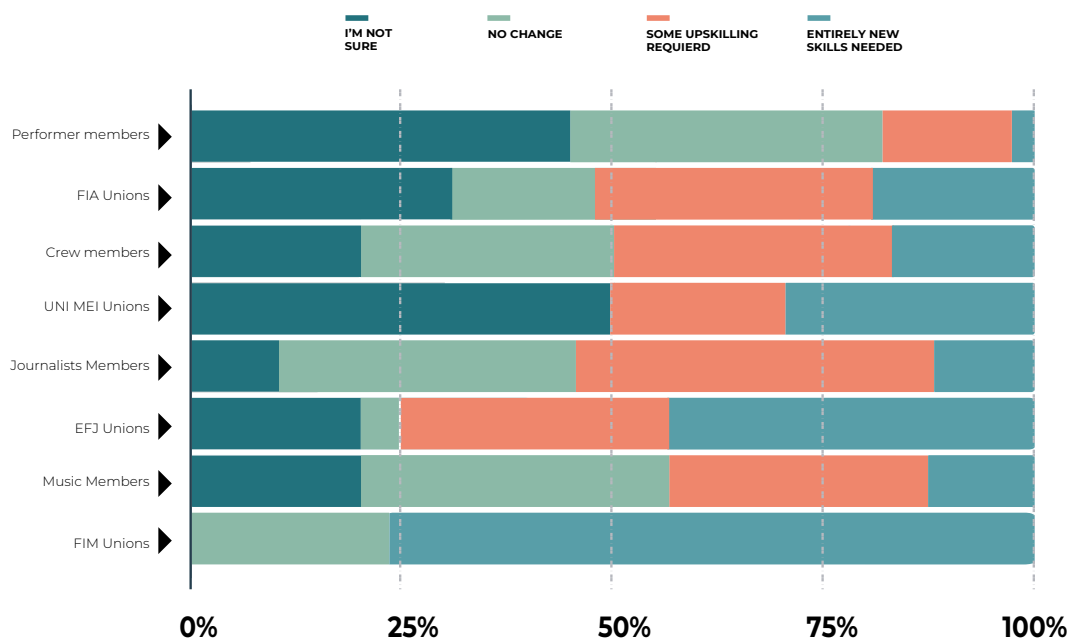
Across all four sectors, members and unions broadly assume that AI has not yet transformed daily workload, but unions perceive more change and uncertainty than their members. A majority of actors, crew, journalists

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



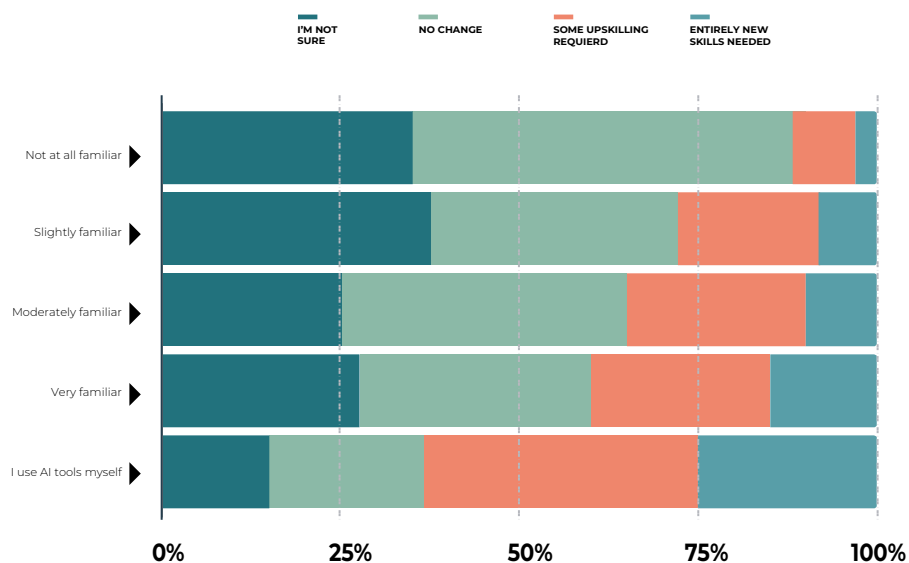
The survey data reveals a striking divergence between how union members and their representative organizations perceive the skill implications of AI. Across all categories (actors, crew, journalists, and music workers) unions consistently report higher rates of “some upskilling required” and “entirely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

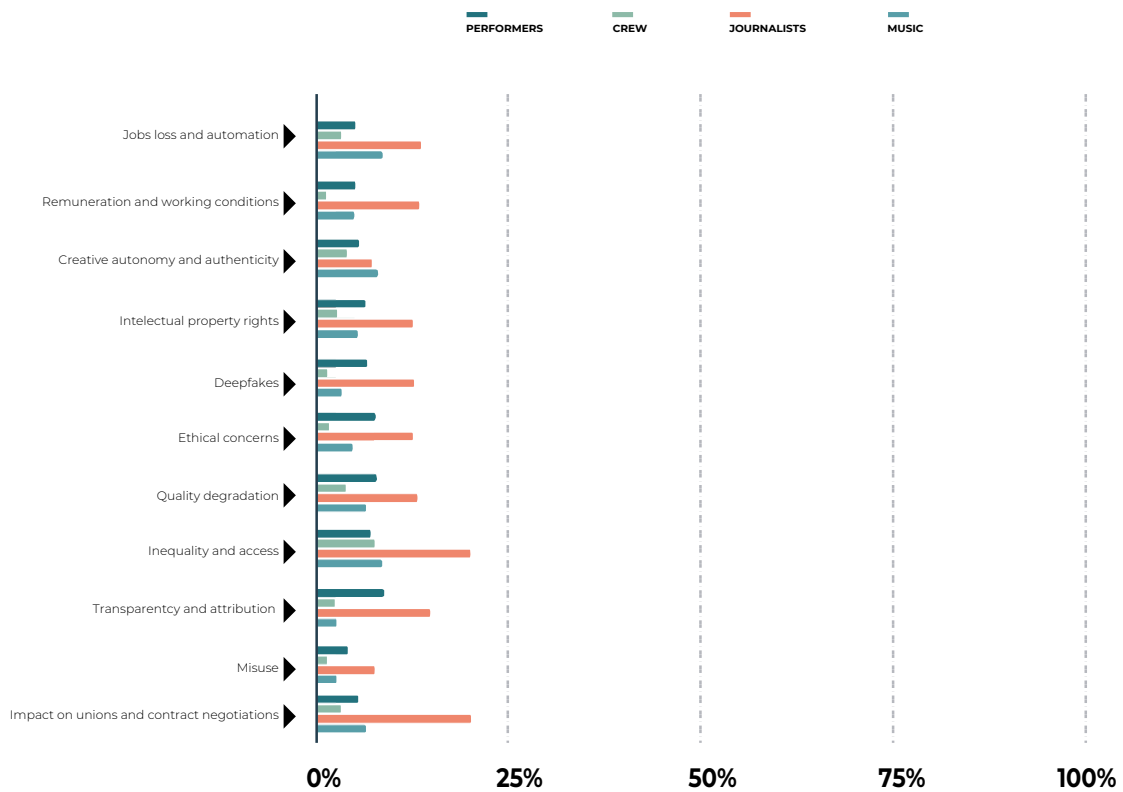
Also notable is the persistently high level of uncertainty (“I’m not sure”) across all groups including the most experienced ones. Even among respondents who use AI tools themselves, 9% remain uncertain about the impact on their skills, and in the “very familiar” group that figure rises to 27%.



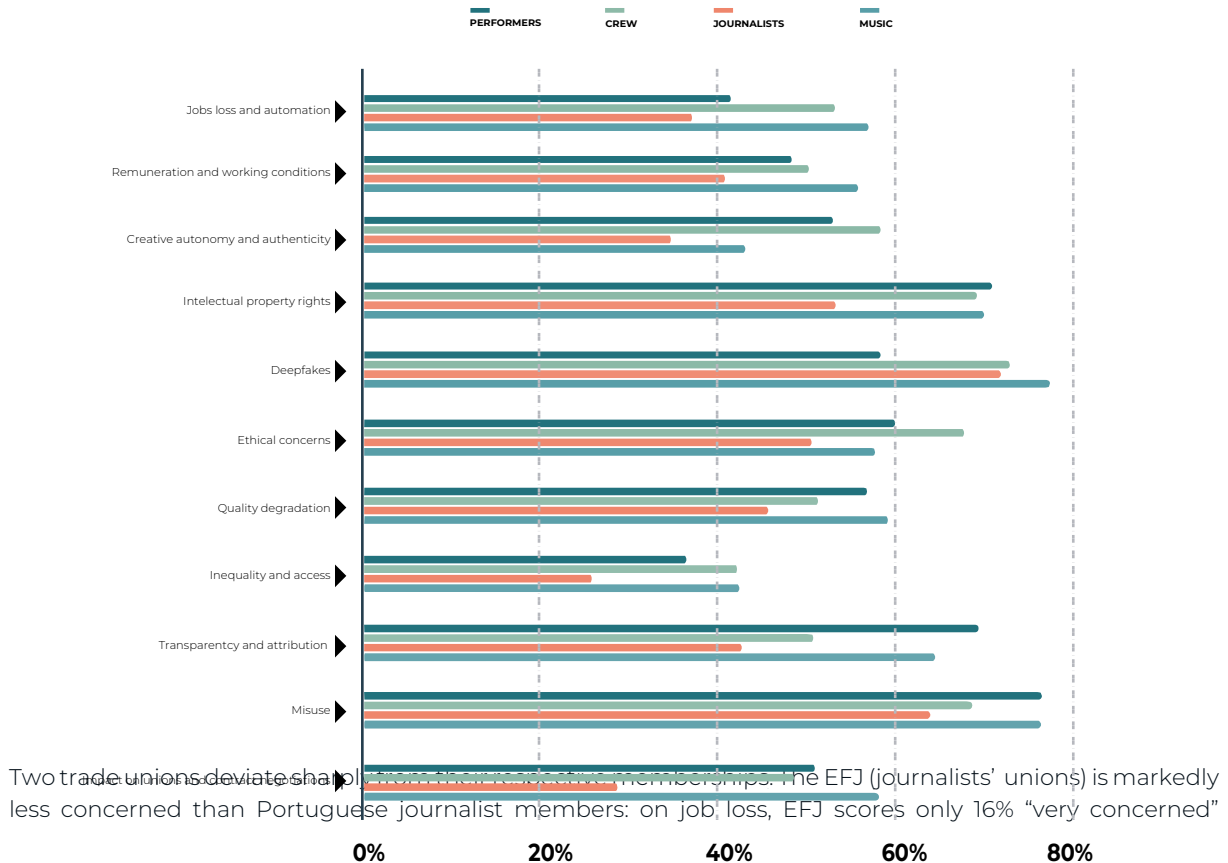
●● Concern

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



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..

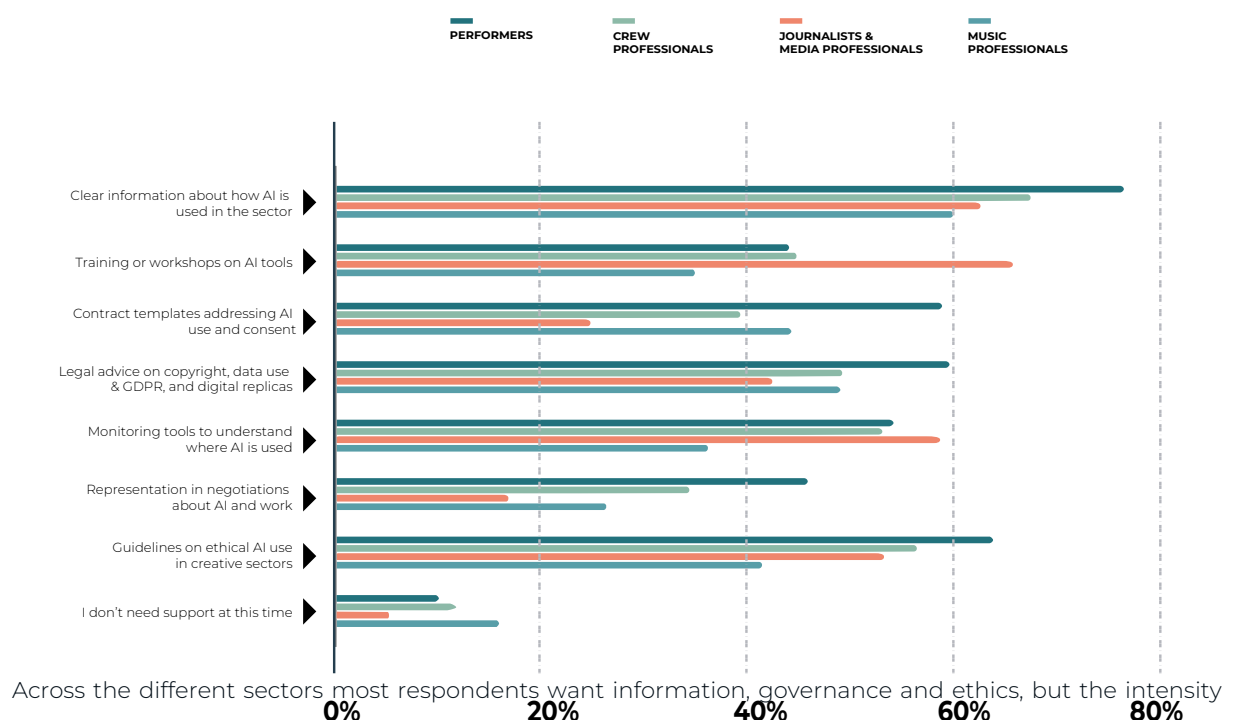
FIM (music unions) shows the inverse pattern: FIM unions are on average slightly more concerned than music members, but score strikingly lower on creative autonomy (23% vs 55%). The fact that music unions rate IP rights, misuse and deepfakes as highly as members do, yet almost disregard creative autonomy,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

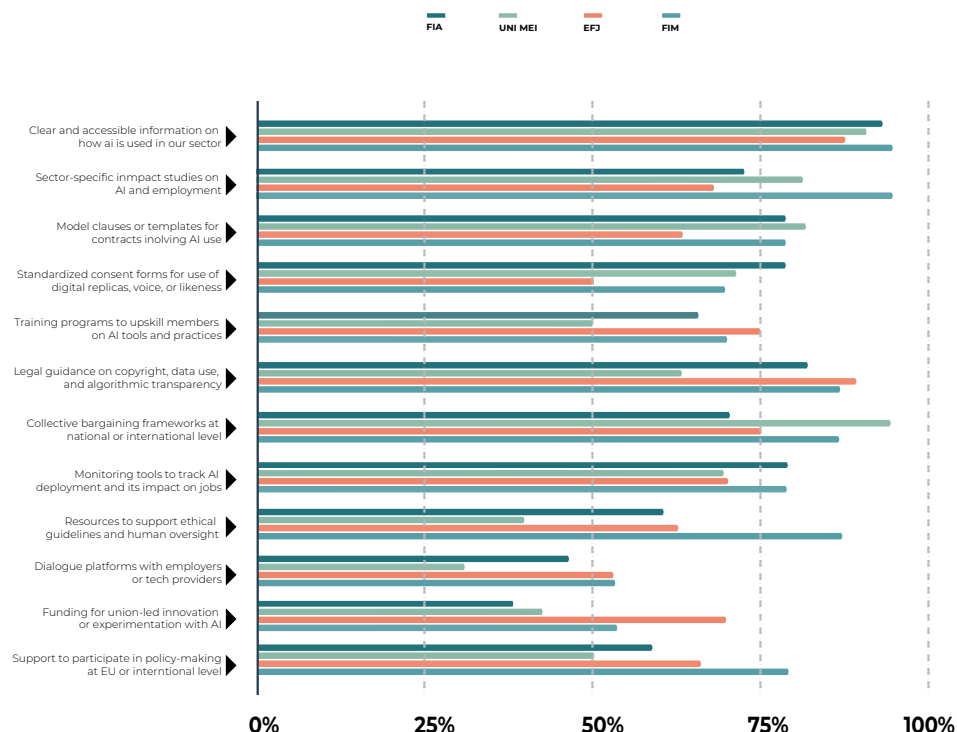
Support needed



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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