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# GENERATIVE AI IN MUSIC, FILM & TV

UNDERSTANDING THE IMPACT  
ON CREATIVE INDUSTRIES  
AND CONSUMERS

# 2026

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# INTRODUCTION

## ABOUT THE AUTHOR

**Audrey Schomer** is a media analyst and research editor at Luminate Intelligence. She previously covered industry topics and trends in media, digital advertising and emerging technology as a research analyst at Barclays, eMarketer and Business Insider Intelligence.

Generative AI has provoked extreme upheavals in the entertainment sector.

In music, the impact has been immediate: AI song generators have proven capable of high-quality outputs indistinguishable from songs made by human artists. In turn, AI-generated tracks have flooded music streaming platforms, where they compete for streams (and royalties).

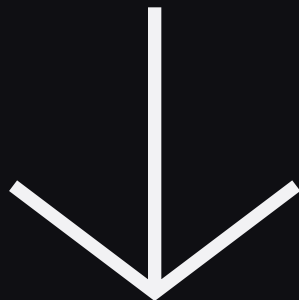
Meanwhile, in Hollywood and the wider film and television industry, AI video hasn't meaningfully displaced movies and shows, but its impact on production workflows and workforces remains a central concern.

What the two industries have in common as far as generative AI goes is copyright chaos. That has meant legal battles with AI companies. At the same time, media companies face an urgent need to build strategies that will ensure consent and compensation for both rights holders and creators at either (ideally both) ends of AI models and services — training and output — and curb the onslaught of unauthorized derivatives of existing works, IP and real-world likeness.

A further question in common for creative industries is the use of generative AI in content production — and how audiences will respond to that use in the content they consume, whether with interest, ambivalence or avoidance.

In ***Generative AI in Music, Film & TV 2026***, Luminate Intelligence lays out the key challenges of the tech in entertainment, progress toward solutions via licensing and partnerships and flux in consumer attitudes toward AI content.

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# MUSIC

GENERATIVE AI IN ENTERTAINMENT

/ 2026



## Music listeners discover the first wave of AI artists.

With the development of AI music generation technology led by companies including Suno and Udio, a tidal wave of AI-generated songs has hit music DSPs over the past two years.

With it, several virtual music artists have accrued millions of streams across their catalogs to date — activity roughly in line with typical emerging artists — and collected associated streaming royalties. Several have had songs rank on Billboard charts, most notably Xania Monet and Breaking Rust.

While the AI artists listed here are likely among the most popular, definitively ranking them isn’t possible yet given a lack of established industrywide standards for identifying AI music at scale, whether with detection or via self-disclosure.

Some human creators have voluntarily noted using AI in songs or claimed responsibility for certain AI artists via DSP artist pages, social accounts or websites. However, such disclosure is not required on most platforms, thus the provenance of many AI artists remains anonymous.

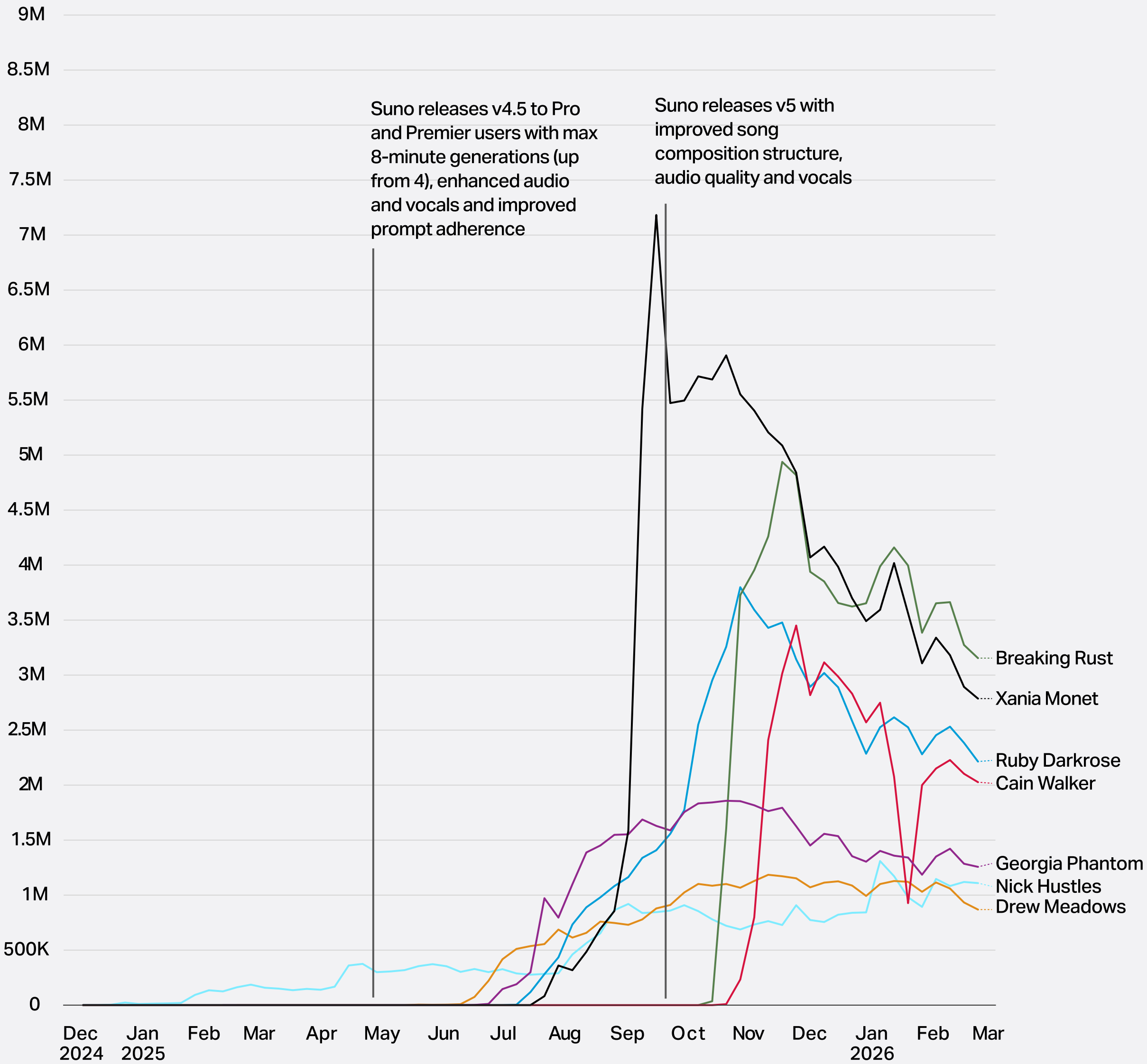
As the ranks of this new wave of performers swell, it raises the prospect of intensifying competition for consumer attention.

### AI RECORDING ARTISTS

| AI Artist/<br>Band | Human<br>Creator              | Main<br>Genre | Billboard Chart<br>Appearances                                                               | AI Song Releases<br>Start Date | Total U.S. Catalog<br>Streams ATD* |  |
|--------------------|-------------------------------|---------------|----------------------------------------------------------------------------------------------|--------------------------------|------------------------------------|--|
| Xania Monet        | Telisha "Nikki" Jones         | R&B/Hip-Hop   | Adult R&B Airplay, R&B Digital Song Sales, Emerging Artists, Hot Gospel Songs, Hot R&B Songs | Aug 2025                       | 117.24M                            |  |
| Breaking Rust      | Aubierre Rivaldo Taylor       | Country       | Emerging Artists, Country Digital Song Sales, Digital Song Sales                             | Oct 2025                       | 71.33M                             |  |
| Ruby Darkrose      | Unidentified                  | Pop           | N/A                                                                                          | Mar 2025                       | 71.16M                             |  |
| Georgia Phantom    | Unidentified                  | Rap           | N/A                                                                                          | Apr 2025                       | 48.30M                             |  |
| Cain Walker        | Unidentified                  | Country       | Emerging Artists, Country Digital Song Sales                                                 | Sep 2025                       | 40.50M                             |  |
| Drew Meadows       | Unidentified                  | Country       | N/A                                                                                          | May 2025                       | 32.86M                             |  |
| Nick Hustles       | Nick Arter                    | R&B/Hip-Hop   | N/A                                                                                          | Dec 2024                       | 32.75M                             |  |
| King Willonius     | Willonius Hatcher             | Comedy        | N/A                                                                                          | Apr 2024                       | 27.01M                             |  |
| Unbound Music      | Terrance LeDoux               | Country       | Emerging Artists, Rock Digital Song Sales                                                    | Aug 2024                       | 26.34M                             |  |
| Solomon Ray        | Christopher “Topher” Townsend | Gospel/Soul   | Hot Gospel Songs, Gospel Digital Song Sales, Emerging Artists                                | Oct 2024                       | 17.92M                             |  |
| Aventhis           | David Vieira                  | Country       | Country Digital Song Sales                                                                   | Mar 2025                       | 13.82M                             |  |
| Juno Skye          | Nguyen Duc Nam                | Pop           | Emerging Artists                                                                             | May 2025                       | 12.58M                             |  |
| Enlly Blue         | Thong Viet                    | Blues         | Emerging Artists, Rock Digital Song Sales                                                    | Aug 2025                       | 5.73M                              |  |
| The Velvet Sundown | Unidentified                  | Rock          | N/A                                                                                          | May 2025                       | 4.39M                              |  |

U.S. STREAMING ACTIVITY AMONG AI RECORDING ARTISTS

Total weekly streams



SOURCE: LUMINATE CONNECT, MARCH 2026; INCLUDES U.S. TOTAL ON-DEMAND (AUDIO+VIDEO)

The rise of song generators sparked music’s AI explosion.

The creators behind several notable AI artists, including Breaking Rust and Xania Monet, have reportedly used Suno to generate full songs or music material. Valued at roughly \$2.5 billion and with around 2 million subscribers, Suno is currently the biggest and most valuable AI music generator to emerge over the past few years.

The timing of these artists’ initial spikes in streaming consumption aligns with Suno’s AI model upgrades released in March and September 2025, which allowed for longer and higher-quality outputs. However, it’s also possible this growth is driven by inclusion in algorithmic playlists or recommendations.

Platform changes coming to Suno and Udio will likely have a significant impact on AI artists’ output and future DSP presence. Under legal settle-ments and partnerships with major labels, both AI companies’ agreements require them to retrain underlying AI models solely on licensed material, which could negatively impact the quality of AI outputs.

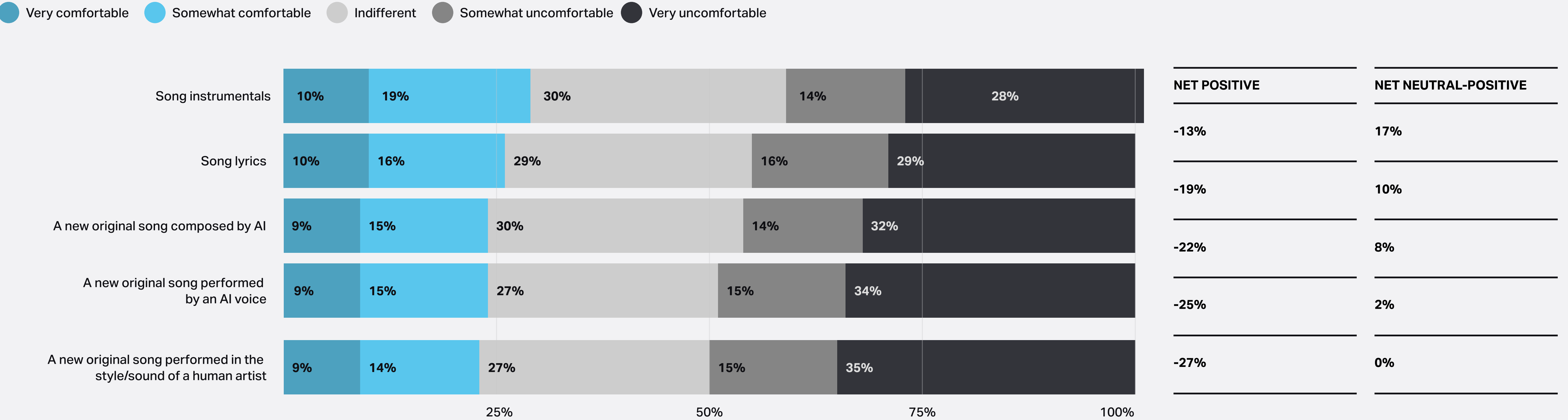
Likewise, both will restrict user downloads of AI songs generated on the platforms. Acting as a “walled garden,” Udio will prevent them altogether, while Suno will limit them to paid subscribers and set a cap requiring payment for additional downloads. It remains to be seen how artists’ growth curves sustain in the long term.

# Consumers are net negative on AI use in music, but a majority are either comfortable or indifferent.

U.S. consumers are more likely to feel uncomfortable than feel comfortable with AI use in music creation. That’s true across the board, whether a song is fully AI generated or partially, such as for a track’s instrumentals, lyrics or vocals, though sentiment is more negative toward fully AI compositions or performances. While negative sentiment outweighs positive, about a third can be described as ambivalent toward AI use in music. If ambivalence is closer to acceptance, this suggests greater openness than rejection, with most listeners either comfortable or indifferent toward AI being used in music they consume.

## CONSUMER COMFORT WITH AI IN MUSIC CREATION

Share of U.S. music listeners on generative AI being used to create each of the following in music they listen to



SOURCE: LUMINATE U.S. ENTERTAINMENT 365, WAVE 16; FIELDIED IN NOVEMBER-DECEMBER 2025 AMONG U.S. MUSIC LISTENERS 13+ (N=1,420); NET POSITIVE CALCULATED AS % RESPONDENTS VERY/SOMEWHAT COMFORTABLE MINUS % UNCOMFORTABLE; NET NEUTRAL-POSITIVE COMBINES % COMFORTABLE WITH % INDIFFERENT AND SUBTRACTS % UNCOMFORTABLE

## AI music interest has declined most among young listeners.

Overall consumer interest in listening to AI-generated music has declined in recent months, from net -13% negative in May 2025 to -20% in November. The trend spans all generations, and older demos remain the most anti-AI in music. But interest among Gen Alpha and Gen Z deteriorated most, dropping 10 points from net -6% to -16%.

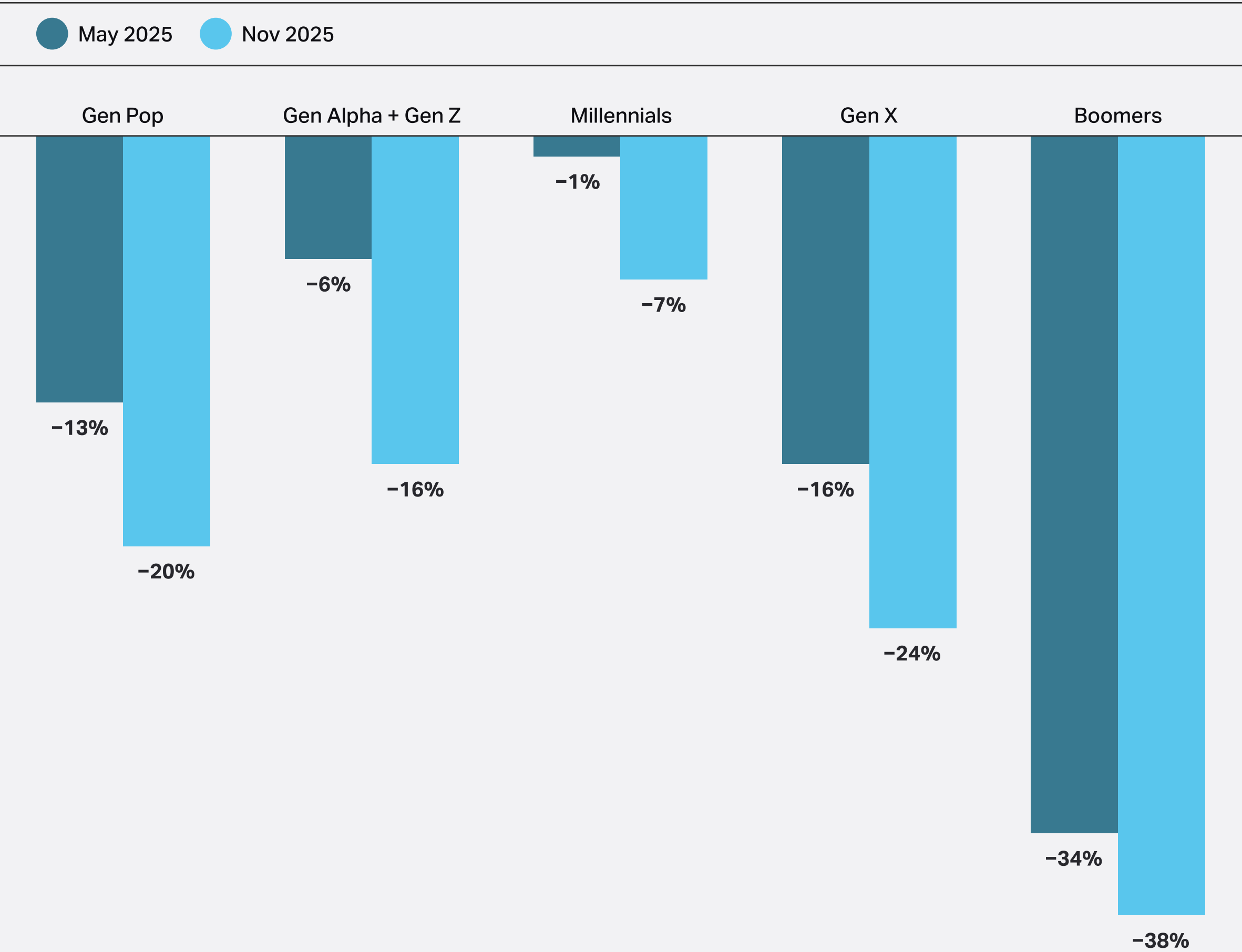
It’s also worth noting that the share of indifferent respondents held steady, meaning net declines came from consumers shifting from positive to decisive negative positions on AI music.

Consumers are undoubtedly more aware of the rising volumes of AI-generated media, better known as “slop,” or low-quality, low-effort content. Given the broad lack of transparency on streaming platforms — labeling AI tracks to indicate when a song is AI generated or contains AI elements — consumers may feel deceived if they later learn a song was produced with generative AI, even if they enjoyed it.

Highly public creative industry and artist campaigns against AI harms have also likely raised awareness and damaged sentiment. This suggests an uphill battle for AI services and AI artists to reverse and improve attitudes. It further highlights the need for platforms to label AI tracks to preserve user trust.

## CONSUMER INTEREST IN LISTENING TO AI MUSIC

Net\* share of U.S. consumers who would be interested in listening to music if they knew it was produced using generative AI



SOURCE: LUMINATE U.S. ENTERTAINMENT 365, WAVES 14, 16; FIELDLED IN MAY 2025 AMONG U.S. CONSUMERS 13+ AWARE OF GENERATIVE AI (TOTAL N=1,697; GENS ALPHA + Z N=448; MILLENNIALS N=421; GEN X N=422; BOOMERS N=372) AND NOVEMBER-DECEMBER 2025 (TOTAL N=1,752; GENS ALPHA + Z N=475; MILLENNIALS N=446; GEN X N=446; BOOMERS N=362); \*NET CALCULATED AS % RESPONDENTS MUCH/SLIGHTLY MORE INTERESTED IN AI MUSIC MINUS % LESS INTERESTED

# Young listeners showed the biggest decline in comfort toward AI use in music.

For each age group and AI use in music creation, negative consumer sentiment has worsened since May 2025. Gen Alpha and Gen Z showed the biggest drop-off, down most severely (-21 points) for a new AI-generated song performed in the style or sound of a real human artist. Attitudes will undoubtedly evolve and may improve as the industry legitimizes gen AI’s opportunity and tamps down harms, as music rights holders enter licensing deals and partnerships with AI developers and new AI consumer services and features for music fan engagement come to market in 2026.

## CONSUMER COMFORT WITH AI USE IN MUSIC CREATION

Net\* share of U.S. music listeners un/comfortable with generative AI being used to create the following in music they listen to

|                                                                  | Gen Pop |      | Gen Alpha + Gen Z |      | Millennials |      | Gen X |      | Boomers |      |
|------------------------------------------------------------------|---------|------|-------------------|------|-------------|------|-------|------|---------|------|
|                                                                  | May     | Nov  | May               | Nov  | May         | Nov  | May   | Nov  | May     | Nov  |
| Song lyrics                                                      | -11%    | -19% | -2%               | -18% | -2%         | -9%  | -17%  | -16% | -22%    | -32% |
| Song instrumentals                                               | -4%     | -13% | 6%                | -12% | 0%          | -5%  | -7%   | -12% | -13%    | -22% |
| New original song composed by AI                                 | -13%    | -22% | -7%               | -21% | -5%         | -12% | -13%  | -21% | -25%    | -32% |
| New original song performed by an AI voice                       | -17%    | -25% | -8%               | -23% | -10%        | -15% | -18%  | -25% | -29%    | -34% |
| New original song performed in the style/sound of a human artist | -16%    | -27% | -6%               | -27% | -7%         | -14% | -16%  | -29% | -33%    | -39% |

# Music industry copyright lawsuits against generative AI companies suggest the necessity of licensing.

Music-related lawsuits against gen AI companies have been brought by major labels, collective management organizations and musicians, with Suno and Udio the most frequent targets. These cases have alleged copyright infringement for unauthorized access (by scraping or “stream-ripping”) and use of owned musical works — song recordings, compositions and lyrics — to train AI models, then released in the market as commercial services. In late 2025, UMG and WMG settled litigation with partnerships that will build fully licensed AI models and revamp platforms to halt or limit market competition risk from AI-generated songs. Meanwhile, German CMO GEMA prevailed in its suit against OpenAI, with the court finding copyright infringement for AI training and outputs of song lyrics.

| AI Copyright Lawsuits Related to Music                                           |             |                |                                                                     |                                                    |                   |                                                                    |                                                                |
|----------------------------------------------------------------------------------|-------------|----------------|---------------------------------------------------------------------|----------------------------------------------------|-------------------|--------------------------------------------------------------------|----------------------------------------------------------------|
| Case Name                                                                        | Month Filed | Jurisdiction   | Plaintiff(s)                                                        | Defendant(s)                                       | Plaintiff Type    | Data/Content Type                                                  | Status                                                         |
| Concord Music Group Inc. et al. v. Anthropic PBC, Dario Amodei and Benjamin Mann | Jan 2026    | CA, U.S.       | Concord Music Group, Universal Music Corp., ABKCO Music             | Anthropic, Dario Amodei, Benjamin Mann             | Music publisher   | Song lyrics                                                        | In progress                                                    |
| Anders v. Stability AI, Inc.                                                     | Dec 2025    | NC, U.S.       | Jerry Anders d.b.a. Anders Manga                                    | Stability AI, Navarr Enterprises d.b.a. AudioSparx | Artist/Songwriter | Song recordings, musical compositions                              | In progress                                                    |
| Koda v. Suno, Inc.                                                               | Nov 2025    | Copenhagen, DE | Koda*                                                               | Suno                                               | CMO               | Song lyrics, recordings                                            | In progress                                                    |
| Woulard v. Suno, Inc.                                                            | Oct 2025    | IL, U.S.       | Class action led by David Woulard, Attack the Sound LLC             | Suno                                               | Artist/Songwriter | Song recordings, musical compositions, NILV and biometric identity | Stay after motion to dismiss                                   |
| Woulard v. Uncharted Labs, Inc.                                                  | Oct 2025    | IL, U.S.       | Same as directly above                                              | Udio                                               | Artist/Songwriter | Same as directly above                                             | Leave to file after motion to dismiss                          |
| Justice v. Uncharted Labs, Inc.                                                  | Jun 2025    | NY, U.S.       | Class action led by Anthony Justice and his label 5th Wheel Records | Udio                                               | Artist/Songwriter | Song recordings                                                    | In progress                                                    |
| Justice v. Suno, Inc.                                                            | Jun 2025    | NY, U.S.       | Same as directly above                                              | Suno                                               | Artist/Songwriter | Song recordings                                                    | In progress                                                    |
| GEMA v. Suno, Inc.                                                               | Jan 2025    | Munich, DE     | GEMA†                                                               | Suno                                               | CMO, PRO          | Song recordings                                                    | In progress                                                    |
| GEMA v. OpenAI Ireland Ltd.                                                      | Nov 2024    | Munich, DE     | GEMA                                                                | OpenAI                                             | CMO, PRO          | Sony lyrics                                                        | Ruled in favor of GEMA (Nov 2025)                              |
| UMG Recordings, Inc. v. Suno, Inc.                                               | Jun 2024    | MA, U.S.       | UMG Recordings, Warner Records, Sony Music Entertainment            | Suno                                               | Music recording   | Song recordings                                                    | Settled by WMG (Nov 2025); UMG and Sony Music proceed          |
| UMG Recordings, Inc. v. Uncharted Labs, Inc.                                     | Jun 2024    | NY, U.S.       | Same as directly above                                              | Udio                                               | Music recording   | Song recordings                                                    | Settled by UMG (Oct 2025), WMG (Nov 2025); Sony Music proceeds |
| Concord Music Group, Inc. et. al. v. Anthropic PBC                               | Oct 2023    | CA, U.S.       | Concord Music Group, Universal Music Corp., ABKCO Music             | Anthropic                                          | Music publisher   | Song lyrics                                                        | Consolidated with Concord II (above)                           |

# Music industry licensing deals and partnerships with AI companies ramped up in 2025 and began to set precedent.

In the roil of lawsuits, 2025 saw the music industry become highly active in striking licensing deals and partnerships with generative AI music companies — three of which settled major litigation against Suno and Udio. While these are the most notable public deals, dozens more smaller-scale licensing agreements have occurred privately. Licensing data is a critical positive step toward ensuring rights holders consent and are compensated for owned content used to train AI models. Early licenses are likely setting important precedents, such as equal revenue splits between music recording and publishing. But deals quickly grow complex when artist and songwriter participation is considered, where the devil is in the details.

| KEY MUSIC AI LICENSING DEALS & PARTNERSHIPS                                    |              |          |                         |                   |                                         |                                    |
|--------------------------------------------------------------------------------|--------------|----------|-------------------------|-------------------|-----------------------------------------|------------------------------------|
| Music Company                                                                  | AI Developer | Date     | Training Data Licensing | Artist Incubator* | Professional AI Music Tools for Artists | Interactive AI Features for Users† |
| Merlin                                                                         | Udio         | Jan 2026 | Yes                     |                   |                                         |                                    |
| Universal Music Group                                                          | NVIDIA AI    | Jan 2026 | No                      | ✓                 | ✓                                       |                                    |
| UMG                                                                            | Splice       | Dec 2025 | No                      | ✓                 | ✓                                       |                                    |
| WMG                                                                            | Suno         | Nov 2025 | Yes                     |                   |                                         | ✓                                  |
| UMG, Sony Music Group, Warner Music Group and their respective publishing arms | KLAY Vision  | Nov 2025 | Yes                     |                   |                                         | ✓                                  |
| WMG                                                                            | Udio         | Nov 2025 | Yes                     |                   |                                         | ✓                                  |
| UMG                                                                            | Udio         | Oct 2025 | Yes                     |                   |                                         | ✓                                  |
| UMG                                                                            | Stability AI | Oct 2025 | Unclear                 | ✓                 | ✓                                       |                                    |
| SMG, UMG, WMG, Merlin, Believe                                                 | Spotify      | Oct 2025 | Unclear                 | ✓                 | ✓                                       | ✓                                  |
| Sony Music Publishing, Universal Music Publishing Group, Warner Chappell Music | Musixmatch   | Oct 2025 | Yes                     |                   | ✓                                       |                                    |
| STIM                                                                           | Songfox      | Sep 2025 | Yes                     |                   |                                         |                                    |
| Merlin                                                                         | ElevenLabs   | Aug 2025 | Yes                     |                   |                                         |                                    |
| Kobalt                                                                         | ElevenLabs   | Aug 2025 | Yes                     |                   |                                         |                                    |
| SourceAudio                                                                    | ElevenLabs   | Jul 2025 | Yes                     |                   |                                         |                                    |
| UMG                                                                            | YouTube      | Aug 2023 | No                      | ✓                 | ✓                                       |                                    |

# Authorized fan remixing will be core to AI music apps.

Under recent deals with major labels, Udio, Suno and KLAY are each building different kinds of AI-powered user interactivity into forthcoming services. Hook and MashApp landed earlier on AI music remixing, with licensing deals that allow users to remix, mash up or otherwise manipulate participating songs from label catalogs. Spotify has also indicated plans to add AI remixing as part of a higher-priced premium subscription tier, described as a superfan tier dubbed Music Pro.

Payment details are scant, and the extent to which artists and songwriters choose to opt in remains to be seen. But song “modding” is already a real trend, with fans sharing manipulated versions of songs that themselves become popular. Further, as described, this new form of user interaction would create a new royalty by monetizing fan-made AI-generated derivatives of existing songs that have been licensed and opted in. The aim is not only to restrain unauthorized user-generated derivatives made with song generators but to turn them into a new monetized revenue stream for artists and rights holders.

| AI Developer | Launch Date | Music Partners                                                              | Remix Features                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------|-------------|-----------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Udio         | Dec 2025    | WMG                                                                         | Developing fully licensed music generation models (and retiring old models) and revamping its AI song generation service, adding features that will let users interact with music from WMG artists and songwriters who opt in their voices or styles, with remuneration for use. Offers off-platform AI song downloads for paid subscribers only, with a download cap and fee for additional downloads.       |
| KLAY Vision  | TBA         | UMG, WMG, SME and their publishing arms                                     | Developing a fully licensed music generation model to power a forthcoming subscription-based interactive AI music streaming service that will let users remake and manipulate songs in different styles.                                                                                                                                                                                                      |
| Udio         | Apr 2024    | Merlin, UMG, WMG                                                            | Converting its service from an AI song generator to a fully licensed music remixing and fan engagement platform that will let users interact with and stream licensed music, with features for remixing, mashups, covers or new songs using the voices or styles of artists or songwriters who opt in, with remuneration for use. Restricts any off-platform downloads. Revamped version launch in 2026.      |
| Spotify      | TBA         | SMG, UMG, WMG, Merlin, Believe                                              | Developing “responsible” AI products for fans and artists under Spotify’s generative AI research lab and product team, in consultation with rights holders, artists, songwriters and producers. Plans to launch a superfan subscription tier called Music Pro that could include in-app AI-powered remix features for fans to create AI derivatives of existing music.                                        |
| Hook         | Sep 2024    | 16 music partners, including Downtown Music, Glassnote Records and Too Lost | Social music remix app that offers AI-powered tools and features letting fans remix, mash up or otherwise manipulate licensed and opted-in songs, add their own photos or video clips to share in the app or on TikTok, Instagram or other social platforms. Offers a catalog of songs from 16 music partners and 1,200+ artists and remunerates when their works are used in user-generated content remixes. |

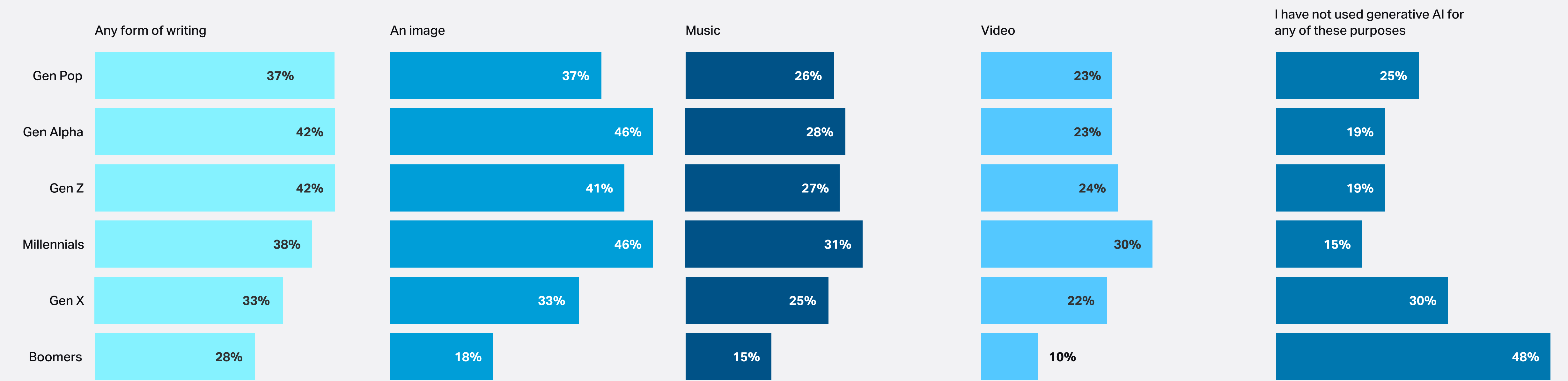
# AI music services might become next-gen DSPs — and vice versa.

After operating as song generators, Udio and Suno are now revamping their platforms to allow users to create, stream and share their own AI works and reworks of songs as well as stream artists’ original tracks. This suggests that Udio and Suno stand to become DSPs in their own right, hybrid platforms converging multiple types of music engagement and interaction, including AI song generation and remixing, music streaming and social sharing, curation and fan communities.

As Spotify, YouTube and likely others work on integrating AI tools of their own, DSPs likewise stand to become such holistic platforms. As envisioned, AI interactivity with an artist's songs becomes an expression of superfandom. The impact of AI-enabled DSPs will depend in part on whether they operate as walled gardens by restricting off-platform downloads of AI-generated songs or derivatives, meaning users would only be able to create or engage with them in-app, where they can directly benefit the artist (rather than compete with them or confuse listeners).

## CONSUMER GENERATIVE AI USE FOR STYLE MIMICRY

Share of respondents who have prompted or used a generative AI tool to create the following types of content in the style of a specific artist or author

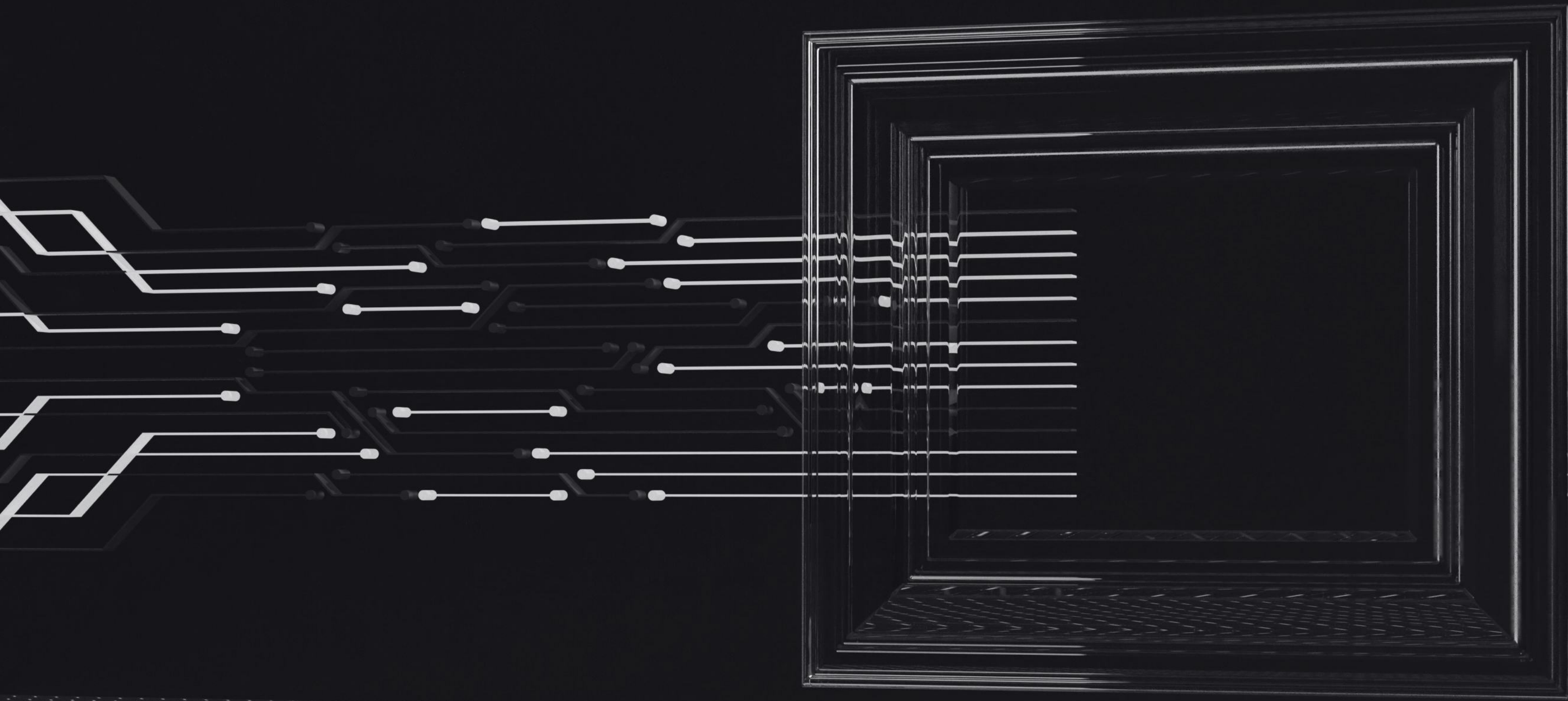


SOURCE: LUMINATE U.S. ENTERTAINMENT 365, WAVES 14-16; FIELDED MAY, SEPTEMBER AND NOVEMBER 2025 AMONG U.S. CONSUMERS 13+ (TOTAL N=3,277; GEN ALPHA N=180; GEN Z N=812; MILLENNIALS N=961; GEN X N=800; BOOMERS N=500)

# FILM & TV

GENERATIVE AI IN ENTERTAINMENT

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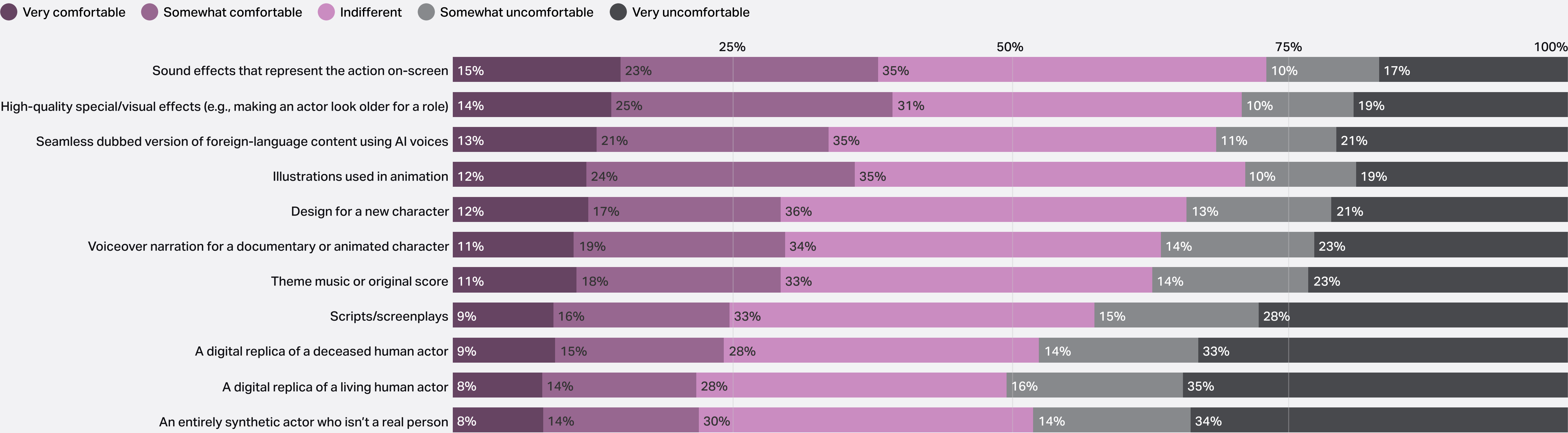


# Consumers tend to be uncomfortable with AI use in most film and TV processes.

Consumer acceptance of generative AI in content will be among the considerations driving decision-making on its use in film and TV content creation. Asked how they felt about a broad range of use cases for AI in film and TV production, consumers consistently lean toward discomfort over comfort, though in most cases about a third are indifferent. The greatest discomfort registers for scenarios that involve replacing actors with digital replicas or fully synthetic performers.

## CONSUMER COMFORT WITH AI IN FILM & TV PRODUCTION

Share of U.S. film & TV viewers on generative AI being used to partially or wholly create each of the following in movies or TV shows they watch

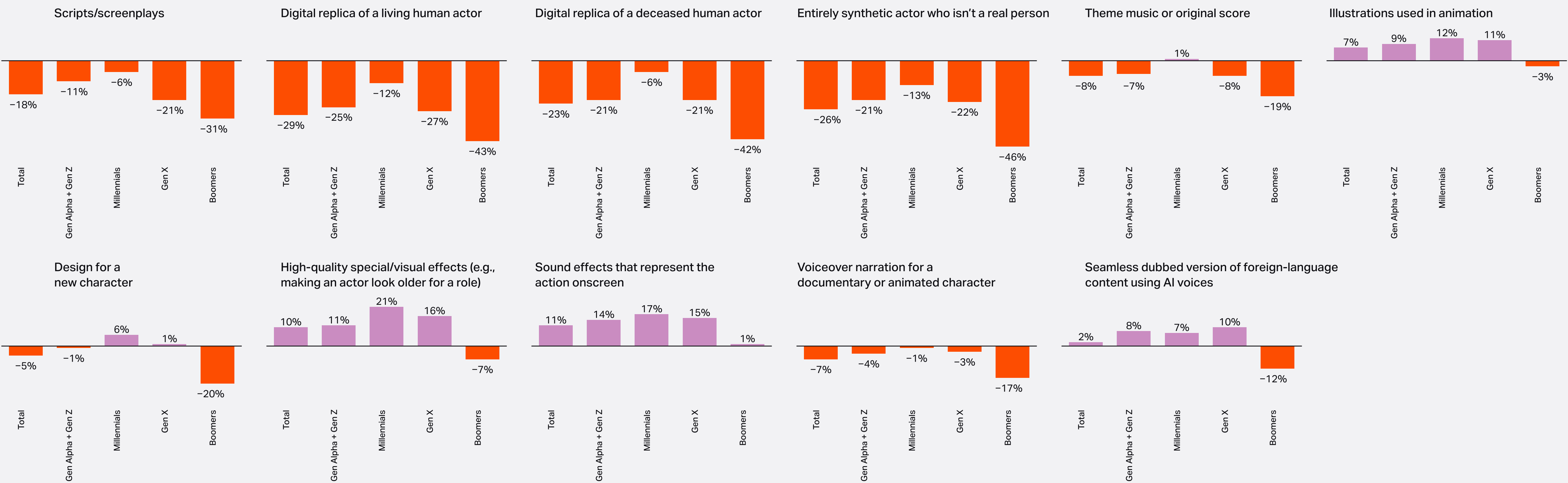


# Older audiences are more anti-AI in film and TV production.

Disregarding indifferent respondents, consumer comfort is net negative toward most uses of AI in film and TV development, production and distribution. Greater discomfort spans all generations, though older audiences are consistently more opposed. However, consumers are notably more likely to be accepting of some uses, as sentiment is net positive toward AI use for visual effects, sound effects, animation and dubbing.

## CONSUMER COMFORT WITH AI USE IN FILM & TV PRODUCTION

Net\* share of U.S. film & TV viewers who would feel un/comfortable with generative AI being used to partially or wholly create each of the following in movies or TV shows they watch



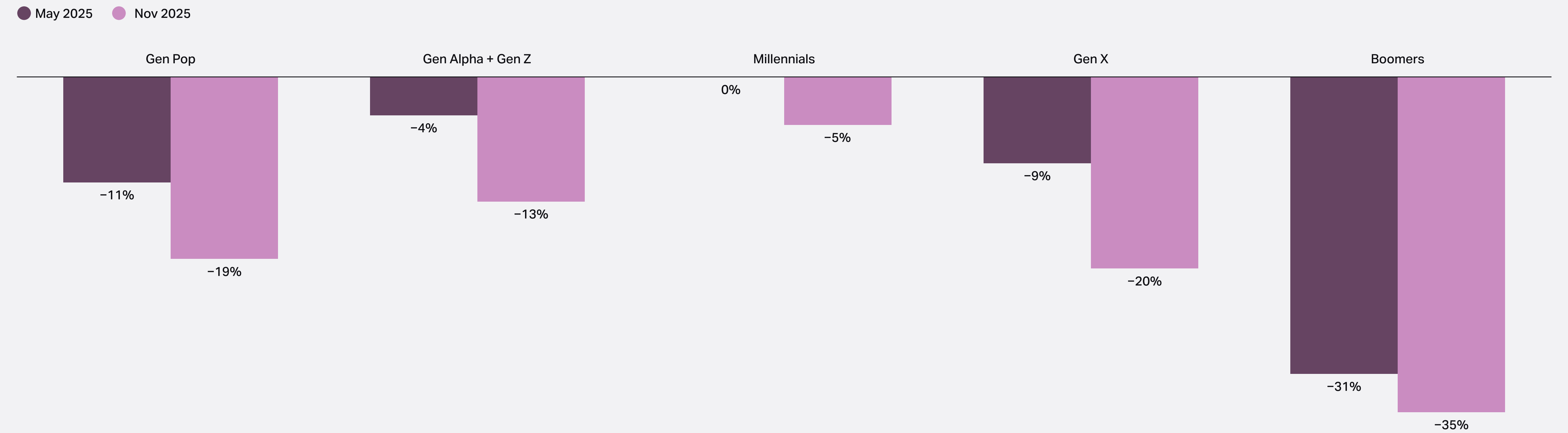
SOURCE: LUMINATE U.S. ENTERTAINMENT 365, WAVE 16; FIELDLED IN NOVEMBER-DECEMBER 2025 AMONG U.S. FILM & TV VIEWERS 13+ (TOTAL N=1,494; GENS ALPHA + Z N=372; MILLENNIALS N=333; GEN X N=404; BOOMERS N=363); \*NET CALCULATED AS % RESPONDENTS VERY/SOMEWHAT COMFORTABLE WITH AI USE MINUS % UNCOMFORTABLE

# Sentiment worsens toward AI-written movies and shows across all generations.

Discomfort with AI use is potentially damaging to interest in consuming content. That’s particularly plausible if AI writes a script. Net consumer interest is negative on watching movies or TV shows penned with generative AI, with older audiences most anti-AI in screenwriting. Interest dropped since May 2025 for all generations, most starkly among Gens Alpha, Z and X.

## CONSUMER INTEREST IN AI-WRITTEN FILM & TV

Net\* share of U.S. consumers who would be interested in watching a movie or TV show if they knew it was written using generative AI



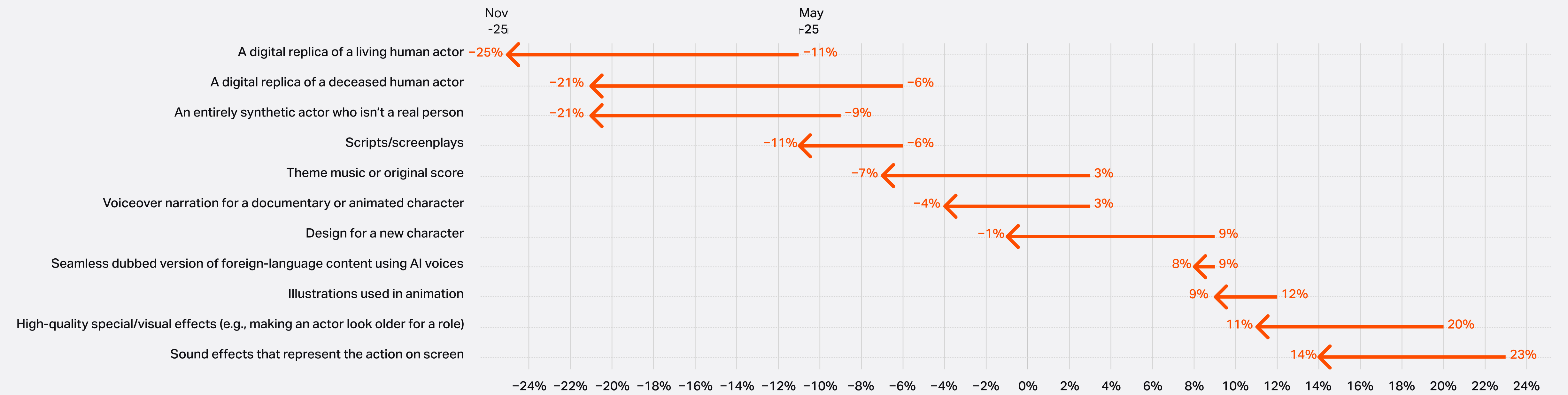
SOURCE: LUMINATE U.S. ENTERTAINMENT 365, WAVES 14, 16; FIELDDED IN MAY 2025 AMONG U.S. CONSUMERS 13+ AWARE OF GENERATIVE AI (TOTAL N=1,697; GENS ALPHA + Z N=459; MILLENNIALS N=412; GEN X N=418; BOOMERS N=384) AND NOVEMBER-DECEMBER 2025 (TOTAL N=1,752; GENS ALPHA + Z N=475; MILLENNIALS N=446; GEN X N=446; BOOMERS N=362); \*NET CALCULATED AS % RESPONDENTS MUCH/SLIGHTLY MORE INTERESTED IN AN AI-WRITTEN MOVIE/TV SHOW MINUS % LESS INTERESTED

# Comfort with AI use in film and TV dampened most among young audiences.

Though older generations are consistently more opposed to AI use to make content they consume, rising discomfort is particularly stark and unanimous among Gens Alpha and Z, with percentage declines observed for every film and TV production use case. The steepest falloffs occurred on using digital performers in place of human actors.

## CONSUMER COMFORT WITH AI USE IN FILM & TV PRODUCTION

Net\* share of Gen Alpha and Gen Z film and TV viewers comfortable with generative AI being used to partially or wholly create each of the following in movies or TV shows they watch



SOURCE: LUMINATE U.S. ENTERTAINMENT 365, WAVES 14, 16; FIELDLED IN MAY 2025 AMONG U.S. GEN ALPHA & GEN Z FILM & TV VIEWERS 13+ (N=364) AND NOVEMBER-DECEMBER 2025 (N=372); \*NET CALCULATED AS % RESPONDENTS VERY/SOMEWHAT COMFORTABLE WITH AI USE MINUS % UNCOMFORTABLE

# Major studio lawsuits against generative AI companies focus on character IP.

Alleged copyright infringement by image and video generators from Midjourney and Chinese firm Minimax made them the first targets of legal action by the Hollywood studios last year. Compared with the dozens of other content-owner lawsuits that have been brought against AI companies since 2023, studio lawsuits are unique for their focus on recognizable characters as the protected IP that’s been infringed, rather than specific published works.

| MAJOR STUDIO AI COPYRIGHT LAWSUITS                  |             |              |                                                                   |                                                                    |                   |                                        |
|-----------------------------------------------------|-------------|--------------|-------------------------------------------------------------------|--------------------------------------------------------------------|-------------------|----------------------------------------|
| Case Name                                           | Month Filed | Jurisdiction | Plaintiff(s)                                                      | Defendant(s)                                                       | Data/Content Type | Status                                 |
| Disney Enterprises, Inc. v. Minimax                 | Sep 2025    | CA, U.S.     | Disney Enterprises, Universal Studios, Warner Bros. Entertainment | MiniMax and parent company Shanghai Xiyu Jizhi Technology Co. Ltd. | Character IP      | In progress                            |
| Warner Bros. Entertainment Inc. v. Midjourney, Inc. | Sep 2025    | CA, U.S.     | Warner Bros. Entertainment                                        | Midjourney                                                         | Character IP      | Consolidated with Disney v. Midjourney |
| Disney Enterprises Inc. v. Midjourney Inc.          | Jul 2025    | CA, U.S.     | Disney Enterprises, Universal Studios                             | Midjourney                                                         | Character IP      | In progress                            |

## Studios prioritize output guardrails over fair use fights.

Recent months have seen studios issue cease-and-desists over the most damaging product releases, threatening legal action targeting the absence of protections designed to restrict model outputs that clearly take from Hollywood movies, TV shows and IP.

Studios have also evidently refrained from suing AI companies, including when the WGA asked them to sue in a letter describing how Hollywood screenplays had been used to train AI models.

Reluctance to sue over training data and explicit focus on character IP suggests a concerted legal strategy, albeit a conservative one. Lawsuits are expensive at a time when media companies are facing cost pressures.

A second likelihood is that studios will refrain from suing deep-pocketed tech companies or existing or would-be AI partners, such as Runway and OpenAI, as long as AI companies show willingness to guardrail their tech to protect studio IP (despite reported evidence of studio content being used for training).

| MAJOR STUDIO AI CEASE-AND-DESISTS |              |                          |                                                                                                              |
|-----------------------------------|--------------|--------------------------|--------------------------------------------------------------------------------------------------------------|
| Month Issued                      | AI Developer | AI Products at Issue     | Studio                                                                                                       |
| Feb 2026                          | ByteDance    | Seedance 2.0             | Motion Picture Association (MPA), Disney, Warner Bros. Discovery, Paramount Skydance, Netflix, Sony Pictures |
| Dec 2025                          | Google       | Gemini, Veo, Nano Banana | Disney                                                                                                       |
| Late 2025                         | Meta         | Unreported               | Disney                                                                                                       |
| Oct 2025                          | OpenAI       | Sora 2                   | CODA* (Content Overseas Distribution Association)                                                            |
| Sep 2025                          | Character.AI | Character.ai             | Disney                                                                                                       |
| Sep 2025                          | OpenAI       | Sora 2                   | Disney                                                                                                       |

# Studio AI deals largely focus on incorporating the tech in production pipelines, not licensing.

Nearly all studio partnerships with AI companies are focused on incorporating AI image and video tech in film, TV, marketing and other multimedia production pipelines, typically concentrated in pre and postproduction. The sole licensing deal is Disney’s agreement with OpenAI, which isn’t for training data but rather licenses Disney characters to appear in AI video and image outputs in Sora and ChatGPT starting sometime in 2026, with some videos eventually migrating to Disney+. Though commonly mistaken for a training data licensing deal, Lionsgate’s partnership with Runway is better understood as training a custom video model, known technically as fine-tuning, for use in production.

| FILM/TV STUDIO AI PARTNERSHIPS |                  |          |                       |                        |                       |                                                                                                                                                                                                                                                                                                                    |
|--------------------------------|------------------|----------|-----------------------|------------------------|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| AI/Tech Company                | Film/TV Studio   | Date     | Training Data License | IP Replication License | AI Tech in Production | Purpose                                                                                                                                                                                                                                                                                                            |
| OpenAI                         | Disney           | Dec 2025 | Unclear               | Yes                    | No                    | License 200+ Disney, Marvel, Pixar and <i>Star Wars</i> animated/illustrated characters (excluding talent likenesses or voices) under three-year term to appear in user-prompted short-form videos on OpenAI's Sora app and images in ChatGPT Images, with a curated selection of Sora videos to stream on Disney+ |
| Runway                         | AMC Networks     | Jun 2025 | No                    | No                     | Yes                   | Incorporate Runway’s generative AI tools in AMC Networks' marketing and TV development processes (e.g., campaign ideation, previs concepts or special effects)                                                                                                                                                     |
| Google DeepMind                | Primordial Soup* | May 2025 | No                    | No                     | Yes                   | Google DeepMind provides three filmmakers associated with Primordial Soup access to generative AI video tools, including the Veo video generation model, to produce short films, with filmmakers providing feedback to help guide AI product development                                                           |
| Runway                         | Fabula†          | Apr 2025 | No                    | No                     | Yes                   | Incorporate Runway’s AI tools into Fabula’s global production pipeline (e.g., pitch materials, concept ideation, storyboarding, VFX)                                                                                                                                                                               |
| Runway                         | EDGLRD‡          | Apr 2025 | No                    | No                     | Yes                   | First-look development deal giving EDGLRD access to Runway’s AI tools for production use on new media projects and formats                                                                                                                                                                                         |
| Meta                           | Blumhouse        | Oct 2024 | No                    | No                     | Yes                   | Pilot program focused on gathering creative industry feedback on Meta Movie Gen, a suite of AI image and video models                                                                                                                                                                                              |
| Runway                         | Lionsgate        | Sep 2024 | No                    | No                     | Yes                   | Train (fine-tune) a custom AI model on a portion of Lionsgate’s film and TV catalog, provided for exclusive use by Lionsgate Studios filmmakers and other creative talent in pre and postproduction on studio projects                                                                                             |

# Artist rights campaigns critique AI training and unethical use.

Thousands of major artists across music, film and TV and other creative industries have attached their names to awareness, activist and advocacy campaigns, open letters, statements and other projects critical of generative AI development and government efforts to weaken copyright to favor it. A central criticism is consistent: The unauthorized training of AI models on creative, copyrighted works without rights holder or creator consent or compensation is harmful to artist livelihoods, incentive to create new works and the survival of human artistry. Fairer approaches to accessing and paying both rights holders and creators for training data are immense and complex but necessary and emerging as creative businesses engage in licensing, partnerships and even lawsuits.

| ARTIST RIGHTS CAMPAIGNS CRITICIZING AI |                                                                                                                                                   |                                                              |                                                                                                           |                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date                                   | Campaign                                                                                                                                          | Organizer                                                    | Signatories                                                                                               | Key Signatories                                                                                                                                                                               | Critiques                                                                                                                                                                                                                                                                                                                                                                      |
| Jan 2026                               | "Stealing Isn't Innovation"                                                                                                                       | Human Artist Campaign                                        | 700+ actors, musicians, songwriters, authors and other creators                                           | Scarlett Johansson, Cate Blanchett, Cyndi Lauper, REM, Questlove, Chaka Khan, Bonnie Raitt                                                                                                    | Argued the unauthorized use of creative copyrighted works to train AI is theft; advocates licensing and partnerships                                                                                                                                                                                                                                                           |
| Mar 2025                               | Open letter to the Office of Science and Technology Policy (OSTP) as public comment in response to the Trump Administration's U.S. AI Action Plan | Natasha Lyonne and Bryn Mooser, cofounders, Asteria Film Co. | 400+ filmmakers, writers, actors, musicians and others                                                    | Ben Stiller, Mark Ruffalo, Cynthia Erivo, Cate Blanchett, Cord Jefferson, Paul McCartney, Ron Howard, Taika Waititi, Guillermo del Toro, Aubrey Plaza, Bette Midler, Olivia Wilde, Chris Rock | Urged the administration not to weaken copyright law to permit AI training on copyrighted works without rights holder consent and compensation                                                                                                                                                                                                                                 |
| Feb 2025                               | Release of the silent album <i>Is This What We Want?</i> as part of the "Make It Fair" campaign                                                   | Ed Newton-Rex, founder and CEO, Fairly Trained               | 1K+ musicians                                                                                             | Kate Bush, Annie Lennox, Damon Albarn, Cat Stevens, Hans Zimmer, Paul McCartney                                                                                                               | Protested the UK government's proposed changes to copyright law that would have allowed text and data mining without permission for AI training for commercial purposes unless rights holders opt out                                                                                                                                                                          |
| Oct 2024                               | "Statement on AI Training"                                                                                                                        | Ed Newton-Rex                                                | 50.5K+ creatives and organizations across literature, music, film, TV, theater, visual and fine art, more | Björn Ulvaeus, Julianne Moore, Thom Yorke, Kate Bush, Kevin Bacon, Max Richter                                                                                                                | Single statement arguing the unlicensed use of creative works to train AI is a "major, unjust threat" to artist livelihoods                                                                                                                                                                                                                                                    |
| Apr 2024                               | "Stop Devaluing Music"                                                                                                                            | Artist Rights Alliance                                       | 200+ musicians                                                                                            | Billie Eilish, Pearl Jam, Nicki Minaj, Katy Perry, Elvis Costello, Stevie Wonder, estates of Bob Marley and Frank Sinatra                                                                     | Argued AI models trained on artist work are designed to undermine and replace human work, as they produce "massive quantities" of AI-generated works that dilute royalty pools paid out to artists and calls on AI developers, tech companies and digital music services not to develop or deploy AI music generation tech, content or tools that harm artists and songwriters |

# METHODOLOGY

**Luminate CONNECT** is a cloud-based music database and analytics platform that tracks, measures and visualizes music consumption activity by ingesting first-party data shared directly by over 500 partners around the world across entertainment, retail and technology.

CONNECT gathers, compiles and attaches performance metrics and meta-data to musical entities including artists, songs, albums and musical releases, processed continually to make next-day consumption data available in the platform interface.

Luminate’s **Entertainment 365** is an original survey fielded online among U.S. respondents 13+ representative of the general population according to the U.S. Census for age, gender, ethnicity and region. This report features findings collected in the following periods.

| WAVES   | COLLECTION DATES      | SAMPLE (N) |
|---------|-----------------------|------------|
| Wave 16 | Nov. 21-Dec. 11, 2025 | 2,000      |
| Wave 15 | Sept. 4-20, 2025      | 2,000      |
| Wave 14 | May 5-16, 2025        | 2,000      |

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# ABOUT LUMINATE INTELLIGENCE

Launched as an extension of the Variety brand in 2020, Variety Intelligence Platform (VIP+) was acquired by Luminate and rebranded as Luminate Intelligence in 2025.

Since that time, Intelligence has established itself as an authority in the entertainment industry, counting executives working at the highest levels of the biggest entertainment brands among its thousands of subscribers.

Luminate Intelligence produces high-quality market research that mixes forward-looking analysis and data on the issues and trends most important to the industry, from film, TV and music to streaming, video games and AI. In-depth white papers are released throughout the year, as are weekly commentaries accessed via email and the Luminate website.

As no Intelligence analysis big or small is complete without statistical charts and tables, we consistently deliver a combination of exclusive Luminate data and a highly curated blend of dozens of relevant third-party data sources, with an emphasis on gathering the most recent numbers.

Our analyses are written in a compelling, provocative style laser focused on putting findings in a prescriptive perspective that drives decision-making.

Intelligence is also available to collaborate with companies looking to create customized reports, either for private internal use or as sponsored marketing material.

## DIG DEEPER

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