
GENERATIVE AI IN MUSIC, FILM & TV

UNDERSTANDING THE IMPACT
ON CREATIVE INDUSTRIES
AND CONSUMERS

2026

INTRODUCTION

ABOUT THE AUTHOR

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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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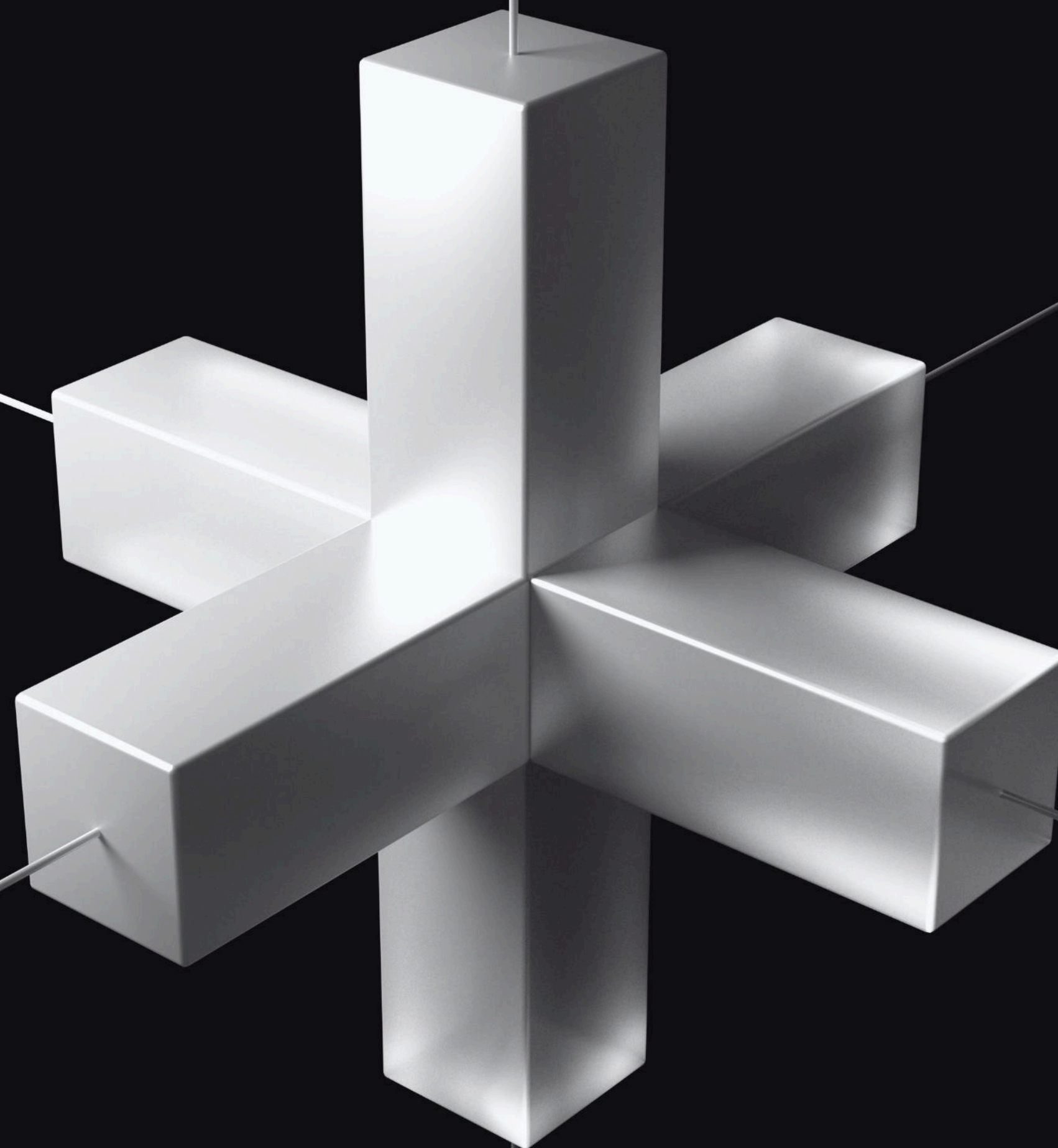
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MUSIC

GENERATIVE AI IN ENTERTAINMENT

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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.

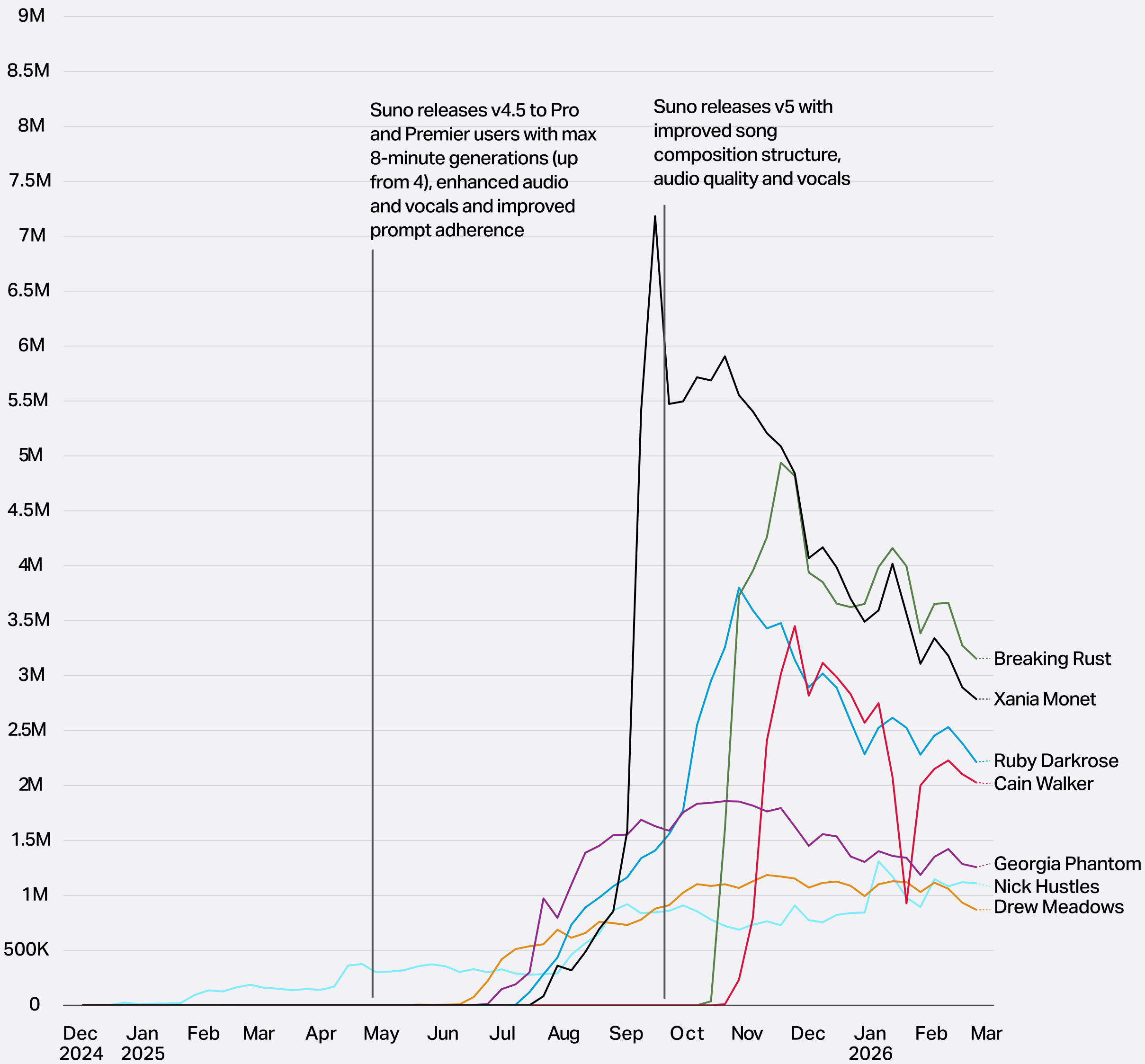
As the ranks of this new wave of performers swell, it raises the prospect of intensifying competition for consumer attention.

AI RECORDING ARTISTS

AI Artist/ Band	Human Creator	Main Genre	Billboard Chart Appearances	AI Song Releases Start Date	Total U.S. Catalog 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.

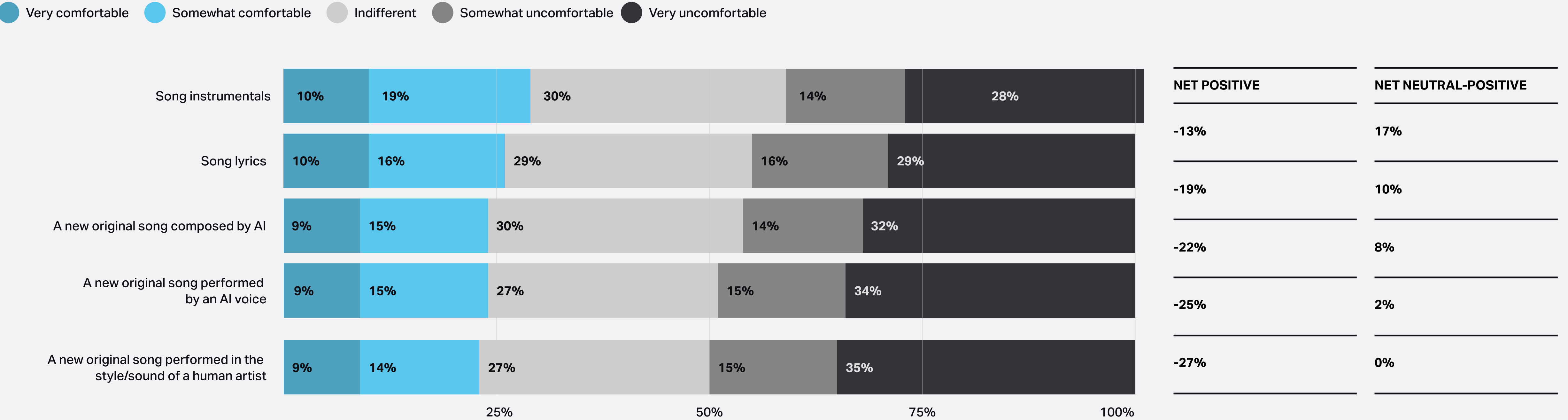
Likewise, both will restrict user downloads of AI songs generated on the platforms. Acting as a “walled garden,” Udio will prevent them altogether, while Suno will limit them to paid subscribers and set a cap requiring payment for additional downloads. It remains to be seen how artists’ growth curves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

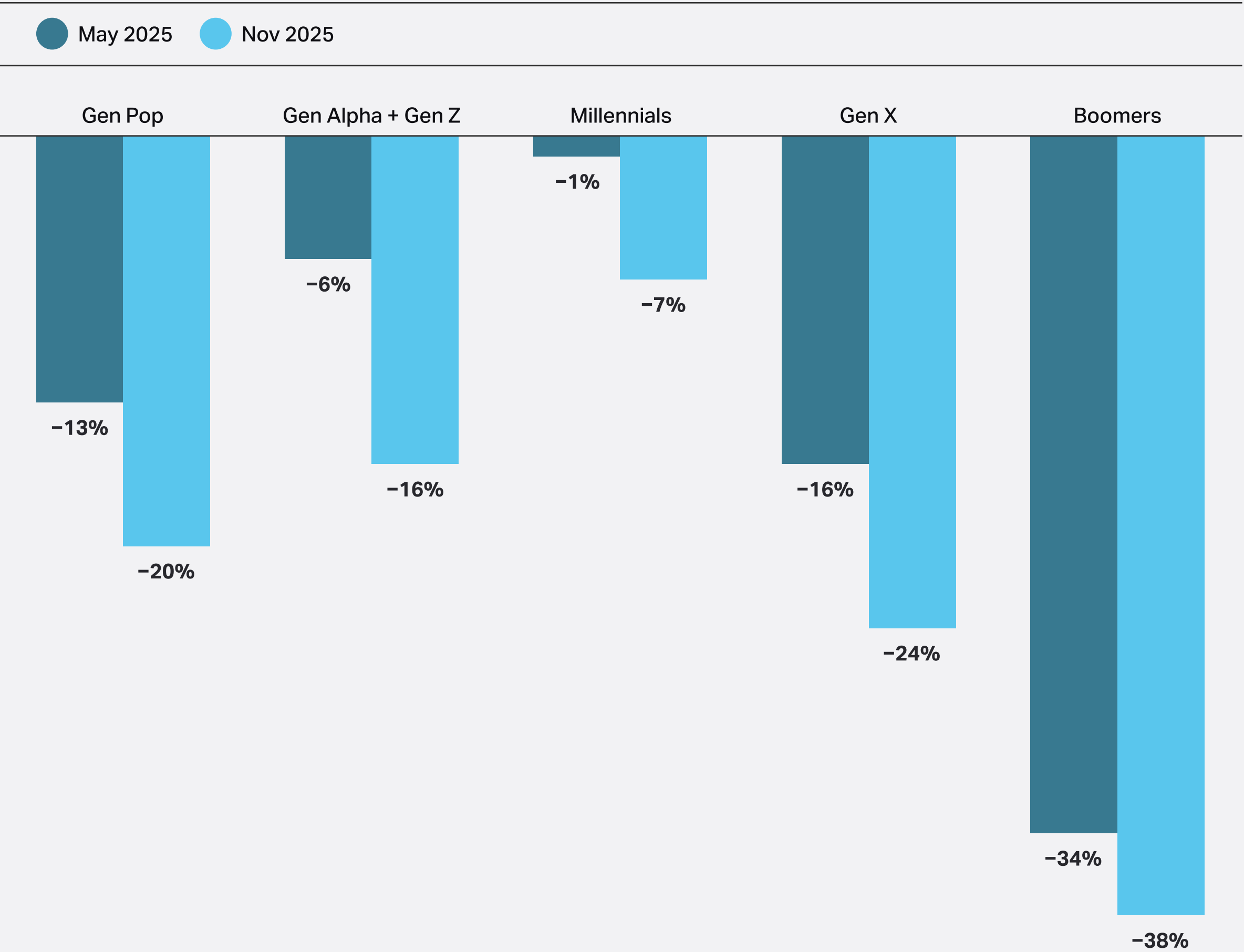
It’s also worth noting that the share of indifferent respondents held steady, meaning net declines came from consumers shifting from positive to decisive negative positions on AI music.

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
Suno	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.

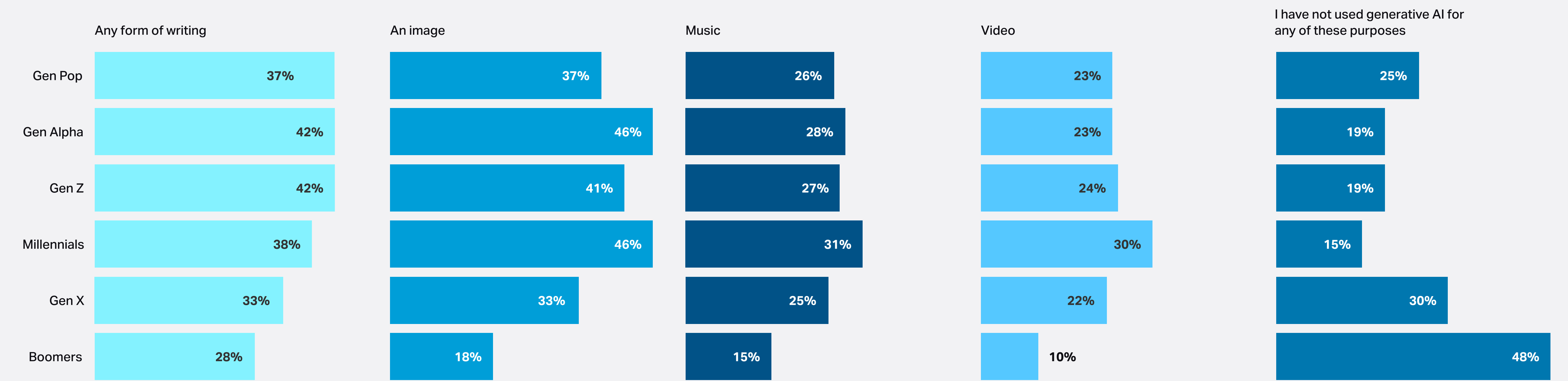
AI music services might become next-gen DSPs — and vice versa.

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

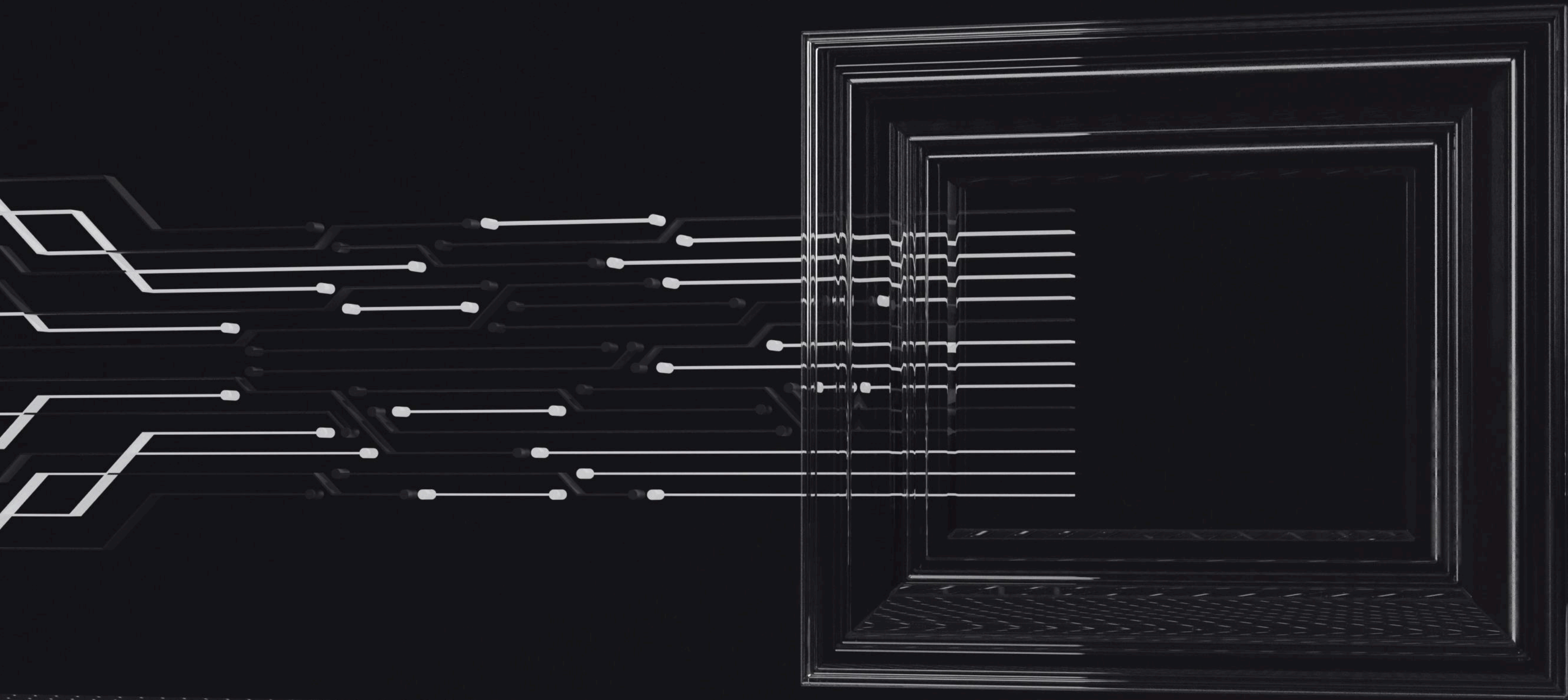


SOURCE: LUMINATE U.S. ENTERTAINMENT 365, WAVES 14-16; FIELDED MAY, SEPTEMBER AND NOVEMBER 2025 AMONG U.S. CONSUMERS 13+ (TOTAL N=3,277; GEN ALPHA N=180; GEN Z N=812; MILLENNIALS N=961; GEN X N=800; BOOMERS N=500)

FILM & TV

GENERATIVE AI IN ENTERTAINMENT

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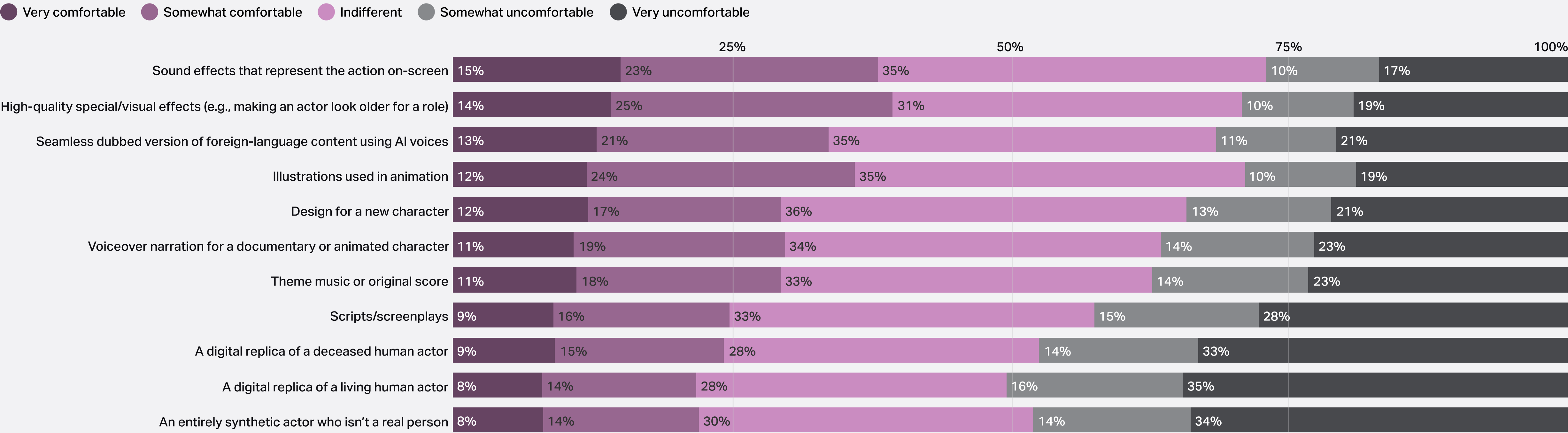


Consumers tend to be uncomfortable with AI use in most film and TV processes.

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

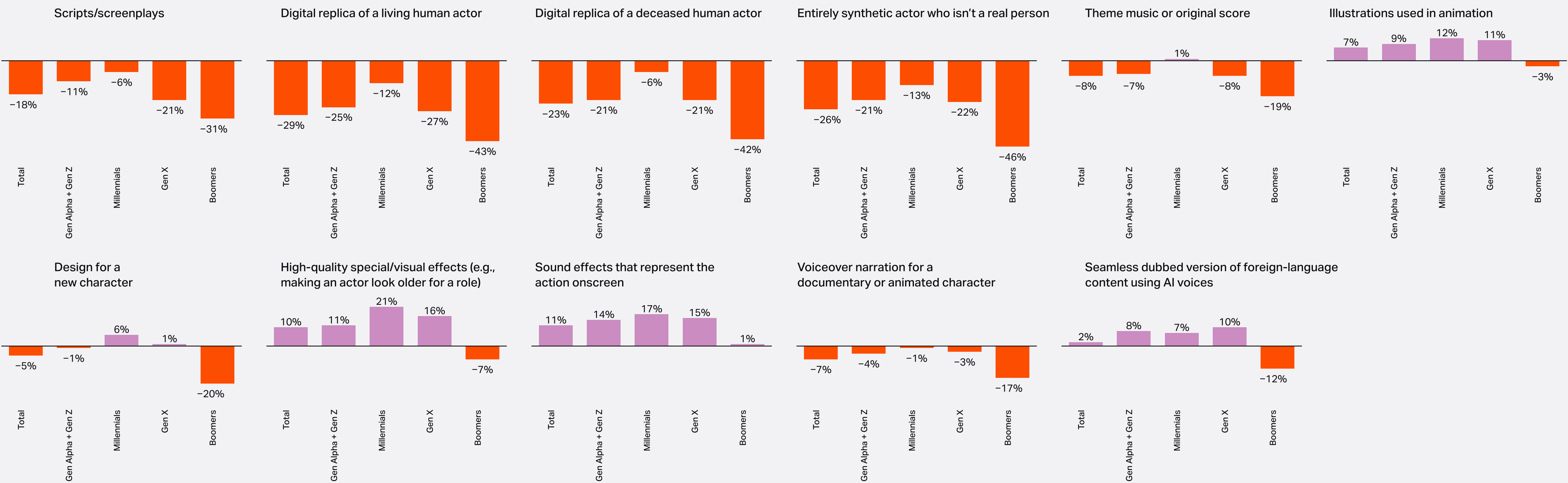


Older audiences are more anti-AI in film and TV production.

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



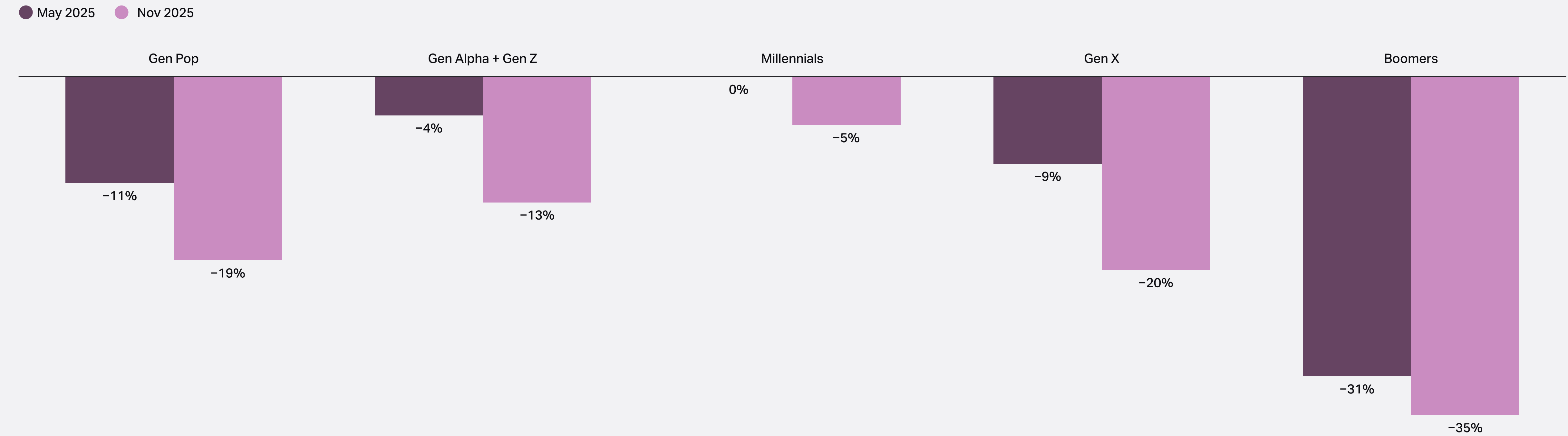
SOURCE: LUMINATE U.S. ENTERTAINMENT 365, WAVE 16; FIELDLED IN NOVEMBER-DECEMBER 2025 AMONG U.S. FILM & TV VIEWERS 13+ (TOTAL N=1,494; GENS ALPHA + Z N=372; MILLENNIALS N=333; GEN X N=404; BOOMERS N=363); *NET CALCULATED AS % RESPONDENTS VERY/SOMEWHAT COMFORTABLE WITH AI USE MINUS % UNCOMFORTABLE

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



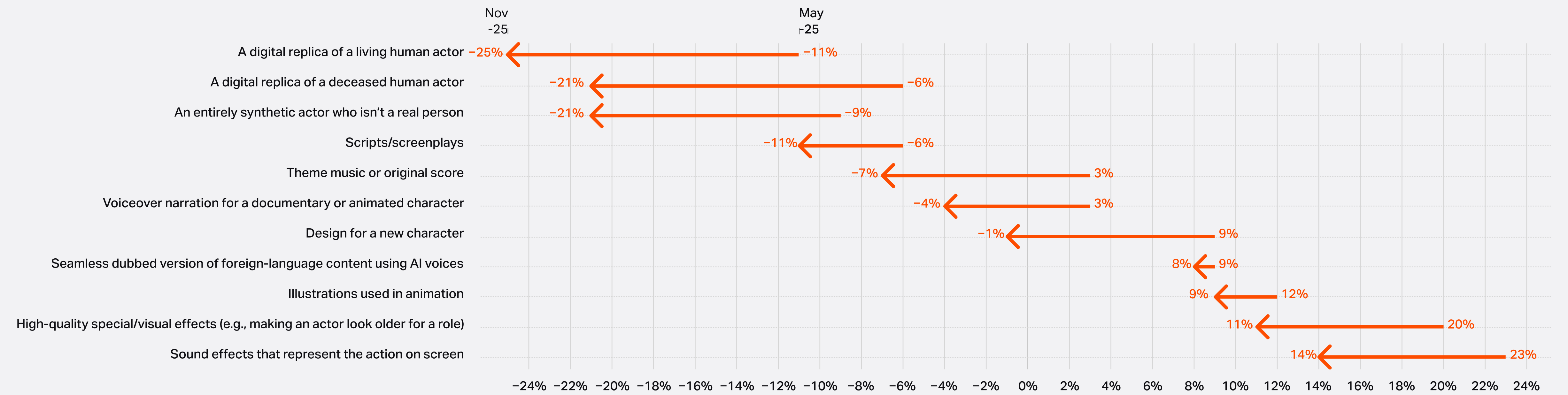
SOURCE: LUMINATE U.S. ENTERTAINMENT 365, WAVES 14, 16; FIELDDED IN MAY 2025 AMONG U.S. CONSUMERS 13+ AWARE OF GENERATIVE AI (TOTAL N=1,697; GENS ALPHA + Z N=459; MILLENNIALS N=412; GEN X N=418; BOOMERS N=384) AND NOVEMBER-DECEMBER 2025 (TOTAL N=1,752; GENS ALPHA + Z N=475; MILLENNIALS N=446; GEN X N=446; 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

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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