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ForesightLAB

AI in the Screen Sector: Perspectives and Paths Forward

A Foresight Lab Report

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The CoSTAR Foresight Lab

Driven by the UK's leading Creative Industries experts, the CoSTAR Foresight Lab is researching the adoption, use and impact of new, emergent and convergent technologies in gaming, TV, film, performance and digital entertainment. Our findings will inform research, development and innovation across the Creative Industries, including the R&D taking place through the convergent screen technologies and performance in real time (CoSTAR) programme, the UK R&D network for creative technology.

CoSTAR is a £75.6 million national R&D network of laboratories that are developing new technology to maintain the UK's world-leading position in gaming, TV, film, performance, and digital entertainment. Delivered by the UKRI Arts and Humanities Research Council, the programme is supporting new innovations and experiences that will enrich the UK's creative industries, economy, and culture. The network comprises the National Lab, the Realtime Lab, the Live Lab, the Screen Lab and the Foresight Lab. CoSTAR is funded through UK Research and Innovation's Infrastructure Fund, which supports the facilities, equipment and resources that are essential for researchers, businesses, and innovators to do groundbreaking work. You can find out more by visiting www.costarnetwork.co.uk.

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Foreword by Rishi Coupland

The rapid development of generative artificial intelligence (AI) is already affecting how stories are told, how content is made, and how audiences engage with screen media. Within the UK's film, television and video games sectors, there is considerable interest in the possibilities that AI might offer – but also a need to understand where and how these technologies are being used, and their likely impacts, both positive and negative.

AI in the Screen Sector: Perspectives and Paths Forward, produced by the BFI as part of our partnership with the CoSTAR Foresight Lab, emerges to address this pivotal moment. Informed by expert interviews and a wide range of data, surveys and case studies, it fills important knowledge gaps, bringing to light and making sense of the perspectives not only of decision-makers, but also technology experts, creative practitioners, storytellers, freelancers and audiences. It paints a picture of the UK where creative experimentation with AI is prevalent, impressive, internationally connected and growing in ambition. And where, simultaneously, there is a growing demand to ensure human creativity is never undervalued, nor taken for granted, but instead championed as the root of all that makes the sector so vital.

With AI technologies developing at such a fast pace, can all these perspectives be aligned? Navigating through a complex ecosystem of issues and opportunities – ranging from intellectual property and sustainability, to investment, skills development and creative agency – the research proposes three achievable yet strategic desired outcomes that we believe provide the alignment that is needed: namely, that the UK should develop a focussed set of collaborative frameworks; that key parts of our sector require targeted support; and that there are identifiable barriers to growth that urgently need to be unlocked.

Our wider ambition is for this report to be more than just an informative document; it has the potential to be a roadmap for uniting the sector in pursuit of a future where AI enhances, rather than detracts from, our creative power. Rather than being a final statement, it is a foundational effort to bring together a complex and fast-moving topic into a structured form. Our hope is that it can be a catalyst for more coordinated action. In our role as a partner in the CoSTAR Foresight Lab and as the lead body for the screen sector, the BFI stands ready to support that action – by contributing data and analysis, by convening the sector to shape policies, and by championing investment in public value outcomes.

Rishi Coupland
Director of research and industry innovation, BFI
and director of insight, CoSTAR Foresight Lab

Executive summary

This report represents, to the best of our knowledge, the first UK-wide exploration of the overall impact of generative artificial intelligence (AI) on the full breadth of the UK's screen sector. Our film, high-end television and video games industries are not only economic powerhouses – employing more than 200,000 people and contributing an estimated £21 billion in gross value added to the UK economy – but also vital cultural ambassadors, shaping global perceptions of UK creativity and storytelling.

Generative AI has the potential to transform how screen stories are developed, content is produced, and audiences engage with media. In time, the implications will be far-reaching. To ensure that the UK remains a global leader in screen production and creative innovation, policymakers must act to support ethical, sustainable, and inclusive AI integration across the sector. Based on an analysis of available data, together with targeted expert interviews and industry surveys, the report surfaces key insights into the existing and potential effects of generative AI.

Key insights

- Globally, the media and screen sectors are objectively in the vanguard of AI use, and are likely to continue to be over the coming years. AI companies are focusing developments and model advancements around creative tasks such as writing, image and video creation, and music generation, and workers across the screen sectors are making use of these capabilities.

- In the UK screen sector to date there have been relatively few high-profile public examples of home-grown AI developments. Is the UK therefore failing to engage with this new technology? Our research indicates the contrary: under the surface, the UK has a similar breadth of use cases as shown in the USA and Europe. We characterise the UK as being like an iceberg – only a little is visible, but beneath the surface there are promising examples of creative and technical engagement and innovation.

- A focussed analysis of creative experimentation with AI in the UK reveals a large "flywheel" of experimentation happening across the screen sector, which in time could drive the next generation of activity.

- The pace of AI advancement, and the ways in which AI models have been developed, are triggering both innovation and concern. Rights issues dominate, and there is strong support from rightsholders and creatives in the UK to strengthen the copyright framework. Beyond rights concerns, other issues loom and require active mitigation. These include concerns about skills, training and job displacement, cultural homogenisation, environmental sustainability, and data security.

- The UK screen sector should position itself to take advantage of the growth potential of AI. A rounded approach is required which harnesses opportunities and addresses barriers and concerns. One immediate and pressing need is for the sector to coalesce around key areas of strategic importance, agree frameworks, allocate resources and collaborate. A commonly understood strategic roadmap is, therefore, essential.

Paths forward

The stakes are high. Without strategic planning, the UK screen sector may find itself outpaced by global competitors and new AI-native studios. Generative AI could democratise content creation and empower new voices, but it could also erode traditional business models, displace skilled workers, and undermine public trust in content. The sector's future may depend on its ability to harness AI's benefits while mitigating its risks.

To that end, this report offers a set of high-level recommendations (**Figure 1**, page 3). These include establishing the UK as a world-leading market of intellectual property (IP) licensing for AI training, embedding sustainability standards to reduce AI's carbon footprint, and supporting cross-disciplinary collaboration to develop market-preferred, culturally inclusive AI tools. The report also calls for structures and interventions to pool knowledge, develop workforce skills and target investments at the UK's high-potential creative technology businesses. Finally, it urges support for independent creators through accessible tools, funding, and ethical AI products.

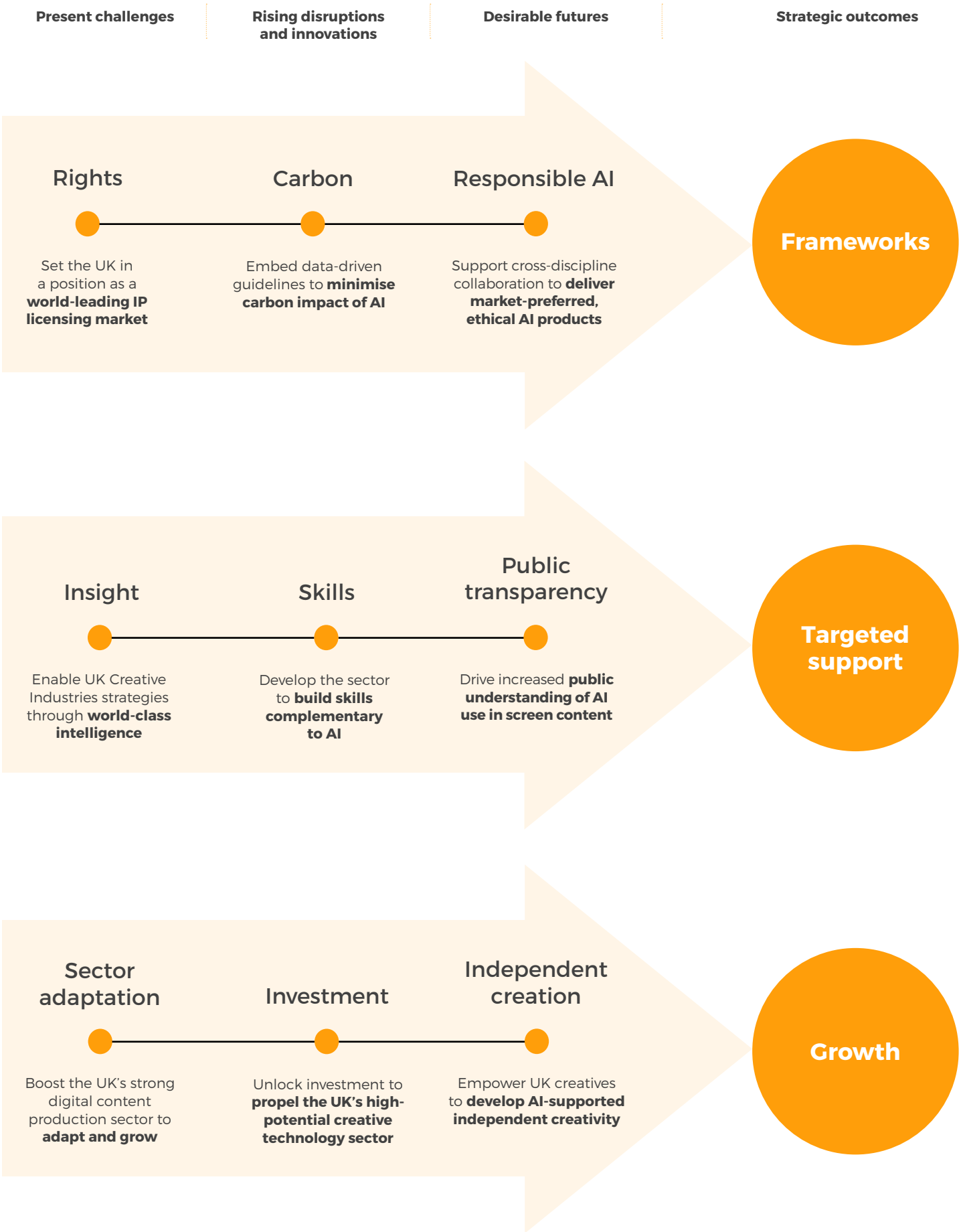

Figure 1: Summary recommendations, over three time horizons, linked to three strategic outcomes.

Methodology

This report focuses on the use of generative AI by UK-based individuals and companies who create, market or distribute film, TV and video game content (the "screen sector"). Information is drawn from published reports and research, and responses to public consultations; surveys of screen sector organisations and creative technologists; and interviews with creatives, technologists, academics, analysts, lawyers, and senior leaders from across the screen sector.

Interviews were designed to explore the following high-level questions:

- What applications of AI are an established part of screen sector workflows?
- What applications of AI are an emerging part of screen sector workflows?
- What areas of the screen sector pipeline have been or may be most disrupted by AI?
- What barriers exist to the adoption of AI technologies in the screen sector?
- What barriers exist to the creation of value in the screen sector from use of AI technologies?
- How might the screen sector work to address or overcome these barriers?

Insights from interviews, surveys and desk research were then analysed using the three horizons framework (Figure 2; Sharpe 2016). Our three horizons encompass:

- **H1:** Present challenges
- **H2:** Rising disruptions and innovations
- **H3:** Desirable futures

In looking across these three horizons, which map to a three-year timescale, we identify recommendations to help the UK screen sector adapt and thrive in the era of generative AI (see **Executive summary**, page 2, and **Paths forward**, page 41).

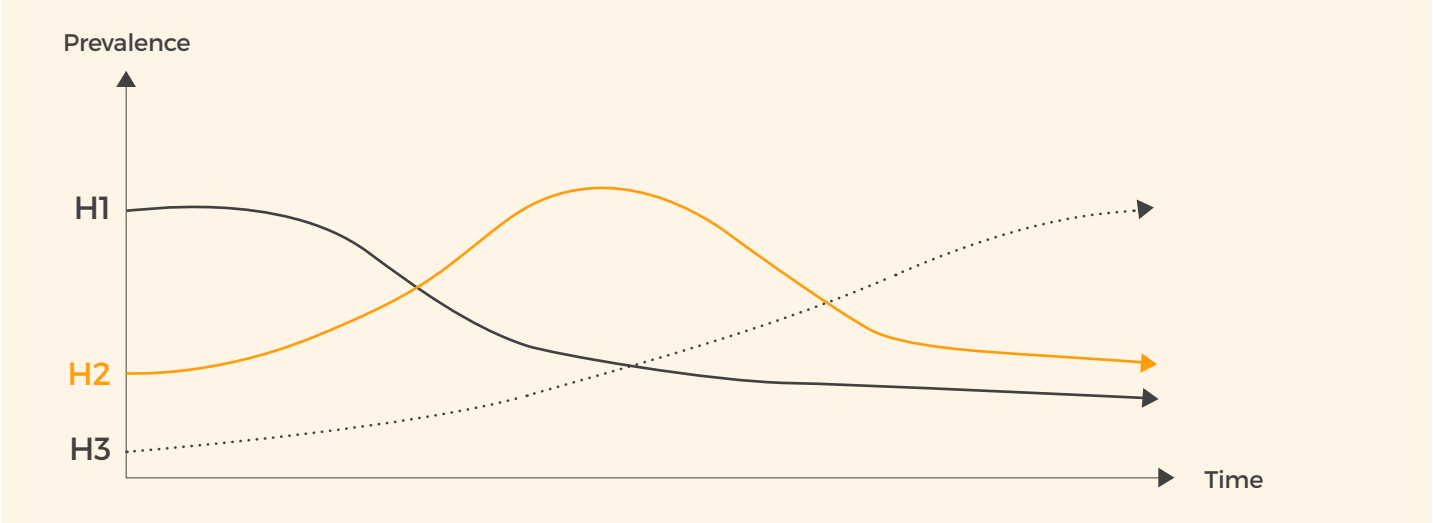

Figure 2: The three horizons framework, adapted from Sharpe 2016.

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Sincere thanks to the following individuals for agreeing to be interviewed for this report and sharing their thoughts and perspectives. Thanks also to our anonymous interviewees, whose contributions are no less valued.

- **Michael Adefehinti, co-founder and technical director, Framesync**
- **Peter Archer, programme director, generative AI, BBC**
- **Simon Barratt, CEO, Cooperative Innovations**
- **Rachel Barton and John Thornewill, founders, Red Nought**
- **Matthew Blakemore, chief executive, AI Caramba!**
- **Charles Cecil, founder, Revolution Software**
- **Adam Cole, filmmaker**
- **Gianluca Dentici, virtual production and visual effects supervisor**
- **David Gardner, co-founder, London Venture Partners**
- **Avi Hakhamanesh, AI consultant and advisor**
- **David Hancock, chief analyst, film and cinema, Omdia**
- **Danijela Horak, head of AI research and development, BBC**
- **Richard Leeming, digital and data consultant**
- **Dr Dominic Lees, associate professor of filmmaking, University of Reading**
- **Xinpeng Liu, PhD candidate, University of Galway**
- **Greg Maguire, founder, Humain**
- **Simon McCallum, producer and curator, British Film Institute**
- **Jonny McCausland, development lead, Hat Trick Lab**
- **Connor Morgan, sales, partnership and development lead, Curious Refuge**
- **Stephen Piron and Harrison Sanborn, Pickford AI**
- **Dr Abigail Rekas, JD, lecturer in law and innovation, University of Galway**
- **JT Rooney, creative producer, Silent Partners Studio**
- **Katrina Stokes, head of archive access, British Film Institute**
- **Cody Updegrave, co-founder, The Ambiguous Company**
- **Jon Wardle, director, National Film and Television School**
- **Kathryn Webb, managing director, AIMICI**

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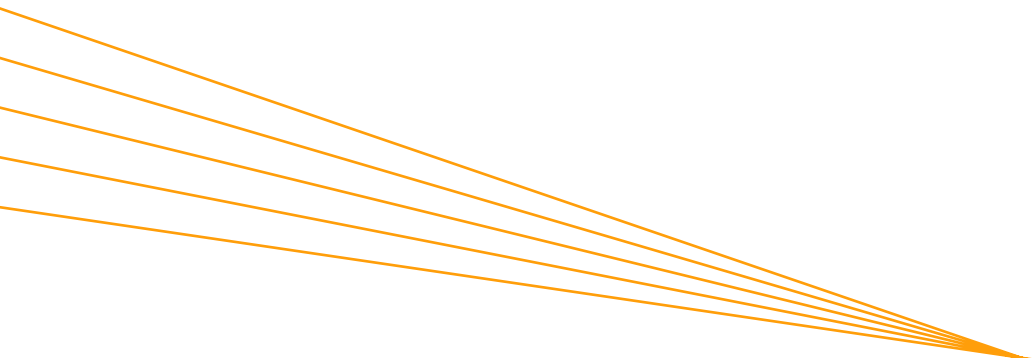
How AI was used in this report

This report was conceived and delivered by a team of human researchers. Its contents were researched, analysed, written and designed by humans. AI tools assisted with several aspects of production:

- Speech-to-text models produced automated transcripts of interviews conducted via Microsoft Teams;
- Google NotebookLM was used to synthesise and extract key themes and quotes from published responses to government consultations and inquiries;
- Microsoft Copilot drafted summaries of the report's contents, including alt text image descriptions.

All AI outputs were manually checked against original sources and their accuracy verified by humans prior to inclusion in the report.



1. Current use of AI in the UK screen sector

Summary

Since the public debut of tools such as ChatGPT and Midjourney in 2022, **the screen sector has been in the vanguard of generative AI uses – prompting both innovation and concern**. As of 2025, applications of the technology range from enhancing the authenticity of accents in award-winning dramas (*The Brutalist*; Pennington 2025) to enabling unscripted, reactive dialogue in video games (upcoming UK title *Dead Meat*; meaningmachine.games). High-profile figures such as directors the Russo brothers are investing in AI development (Ticong 2025), while others, including actor Nicolas Cage, express concerns about AI's impact on artistic integrity, the risks it poses to creative jobs, and the way copyrighted material has been used without permission to train AI models (Saperstein 2025).

This duality – excitement and scepticism – characterises much of the industry discourse surrounding generative AI. Audiences are similarly conflicted. Visible or onscreen uses of the technology, including AI-generated title cards (*Late Night With the Devil*; Bergeson 2024), promotional materials (*Civil War*; Hibberd 2024) and scripts (*The Last Screenwriter*; Dams 2024) have led to a backlash from some quarters. But screen sector adoption of generative AI is also happening behind the scenes, without public outcry. A 2023 survey reported that 17% of UK producers had used AI, with 40% planning to do so (Pact 2024), while 2024 surveys found that nearly half of US media executives and 40% of French screen professionals were using AI (Schomer 2024a; CNC 2024a).

In the UK screen sector, the use of generative AI could be characterised as like an iceberg, with most activity occurring beneath the surface, away from the public eye. The technology is used or experimented with primarily in pre- and post-production, where it is better suited to current workflows and less likely to raise ethical or legal concerns. Companies such as Blue Zoo (blue-zoo.co.uk), for example, refuse to use models trained on unauthorised copyrighted artwork to generate content that will appear in final deliverables. Uptake of generative AI, and frequency of use, therefore varies across roles and organisations. In a 2024 survey, 8 out of 39 individuals working within the UK film, TV and games industries said they "frequently" used AI tools within projects (Phillips 2024). But many software applications now come with generative AI functionality as standard, which may mean that some screen sector workers are using generative AI without realising it.

Where generative AI is being used in the UK screen sector, the focus is on driving efficiencies, stimulating creativity, and opening new possibilities – mirroring the objectives highlighted by French screen agency CNC in a 2024 study (CNC 2024b).

For example:

- A video game company used AI to help upscale thousands of low-resolution art assets for a game remake (Tucker 2023).
- AI is streamlining tasks like **rotoscoping** (see page 11) in visual effects (VFX), according to a VFX supervisor.
- An artist described generative tools as playing the role of "assistant" in the creative process (Drass 2024).

Generative AI is seen as having a "democratising" potential (CNC 2024b), helping break down "barriers" to content creation, according to a UK filmmaker (Fink 2024). One perspective encountered in our desk research and interviews is that the technology could empower a new wave of creators to produce high-quality content with modest resources (Shapiro 2024). However, concerns about copyright and ethical use remain significant barriers to adoption, and academics and industry stakeholders have warned that widespread use of a limited number of models may lead to homogenised (and biased) outputs, resulting in a flattening of originality (Nicoletti 2023; Anderson 2024).

Besides efficiencies and creativity, generative AI is spurring technological innovation. Flawless (**flawlessai.com**), a UK-based creative technology company, has reimagined dubbing through "vubbing", which synchronises actors' facial movements with translated dialogue. Other UK firms, including Humain (**humain-studios.com**) and Metaphysic (**metaphysic.ai**), are pursuing innovations in digital human creation and real-time visual effects. AI-supported innovations also extend to how screen content is managed and classified. The BFI National Archive and the British Board of Film Classification (BBFC) are experimenting with AI for subtitling, metadata generation, and content classification, enhancing accessibility and operational efficiency.

Interactive storytelling is also emerging as a generative AI use case. UK-developed games including *Dead Meat* and *1001 Nights* (**1001nights.ai**) use generative AI to allow players greater control over dialogue and gameplay. At a BAFTA screening, the company Pickford showcased an AI-powered animated show that adapts in real-time to audience input, hinting at a future of participatory entertainment (Piron 2025).

Experimentation is a defining feature of the UK's approach to generative AI. While some organisations, such as the BBC, are piloting structured AI initiatives, others remain in exploratory phases, seeking external expertise to guide their adoption strategies. The UK's strong foundation in creative technology – home to over 13,000 "CreaTech" companies – positions it well for innovation (Easton 2025). However, an uneven distribution of AI expertise and limited internal resources in smaller organisations pose challenges to experimentation. Bridging this gap will be essential to unlocking the full potential of generative AI in the UK screen sector.

1.1. The screen sector is in the vanguard of generative AI uses, prompting innovation and concern

Globally, screen sector applications of generative AI are expanding and attracting greater attention following the public release of tools such as ChatGPT and Midjourney in 2022. As of early 2025, we see award-winning dramas using generative AI to improve the authenticity of accents (Pennington 2025); major Hollywood players, including directing duo Joe and Anthony Russo, investing in the development of new AI tools (Ticong 2025); specialised "AI studios" engaging in "aggressive experimentation" to embed generative AI into the process of film production (Schomer 2024c); and video game developers such as Ubisoft looking to generative AI to increase player immersion through unscripted and reactive character dialogue (O'Brien 2024).

Visible or identifiable uses of generative AI, such as *Late Night With the Devil*'s AI-generated interstitial card images (Bergeson 2024), *Secret Invasion*'s opening credits (Millman 2023), and *Civil War*'s poster designs (Hibberd 2024), have been the focus of much discussion and debate. However, applications of the technology are more numerous and widespread behind the scenes, away from the public eye. Surveys chart a notable uptake of generative AI by those in the screen sector and related industries in recent years. A 2023 survey of 70 UK-based film and TV producers found that 17% had used generative AI in their production processes and 40% planned to do so (Pact 2024), while an August 2024 survey of 65 US-based media and entertainment decision-makers found 49% using generative AI within their organisations (Schomer 2024a).

Reactions to the technology are mixed and often conflicted. US-based filmmaker and academic Aleem Hossain, for example, says he is "simultaneously deeply sceptical and very excited" about generative AI (Hossain n.d.). Scepticism is rooted in the way AI models have been trained on human creative works, often without permission, and the risks they pose to creative jobs. Audiences are also wary: a 2024 cinema screening of a film with an AI-written script (*The Last Screenwriter*) was cancelled due to customer concern about "the use of AI in place of a writer" (Dams 2024). *The Brutalist*'s well-documented use of Respeecher technology in 2024 to "enhance" the pronunciation of Hungarian dialogue was seen as a threat to the craft of acting by some: Nicolas Cage warned of a "dead end if an actor lets one AI robot manipulate his or her performance even a little bit" (Saperstein 2025). However, the film's editor Dávid Jancsó has called for an open discussion about "what tools AI can provide us with", while the Russo brothers have urged "artists … to lead the innovation" in the use of AI. British filmmaker Andy Serkis says: "We have to get over the fear [of AI] … We have to be the ones to write the rule book" (Tabbara 2024).

Adoption of generative AI will be partly the result of a "hype cycle" effect, as described by research firm Gartner, in which a technological innovation triggers rapid uptake and inflated expectations, followed by a period of disillusionment as hype is not met and more realistic expectations set in (Chandrasekaran 2024). There is some evidence for this disillusionment: a 2024 international survey of game developers, by development platform Unity, concluded that "AI hasn't quite been the creative cure-all that some hoped" (Unity 2025). But studies also find that AI adoption is not a fleeting occurrence, even if some claims fail to live up to the hype. In France, a survey by CNC of 794 screenwriters, producers, directors and cinematographers, presented during the Cannes Film Festival 2024, reported that 40% of respondents had used generative AI and that 77% of those AI users had continued to use generative AI at least occasionally (35% daily or regularly; CNC 2024a). Meanwhile, the 2023 and 2024 waves of Unity's game developer survey show little year-to-year change in the use of AI for tasks such as generating artwork and game levels (36% versus 35%), but some growth in the use of AI for writing or improving code (37% versus 47%).

JT Rooney, a creative producer at Los Angeles-based Silent Partners Studio and one of the founders of XR Studios, says that AI has become "just part of the toolkit". This is not the case for all screen sector workers: only 8 out of 39 respondents to a 2024 survey of screen sector workers by Queen's University Belfast agreed that they "frequently use specific AI tools or software" in projects (Phillips 2024). However, the general pattern in adoption of generative AI – across creative, technical and managerial roles, and its use for tasks such as coding, artwork and VFX creation, and post-production – has laid the groundwork for a widespread and fast-developing understanding of the benefits and limits of the technology for screen production.

AI developers are monitoring and responding to the growing use of AI for creative tasks. Analysis of interactions with the Claude AI chatbot by developer Anthropic suggests that around 10% of conversations are about tasks related to arts, design, sports, entertainment and media occupations, second only to those related to computer and mathematical occupations (37%; Anthropic 2025). User insights such as these are leading model developers to focus on advancements in these areas and seeing growth in user numbers as a result. OpenAI, for example, is reported to have added one million ChatGPT users in the space of an hour following the March 2025 launch of its GPT-4o image generator, fuelled by a social media trend for turning photos into Studio Ghibli-style images (Cuthbertson; Sky News 2025). CEO Sam Altman has also spoken publicly about an unreleased model the company has developed that is "good at creative writing" (Coleman 2025).

As AI model developers see opportunities to expand their customer base in the Creative Industries, the screen sector should anticipate further refinements to tools and capabilities and a greater focus on the specific needs of film, TV and video game creatives. At a May 2025 developer event, for example, Google announced a new "AI filmmaking tool", Flow, with in-built camera controls, asset management and a "scenebuilder" functionality to edit and extend generated video clips (Hume 2025).

1.2. The UK's generative AI 'iceberg'

Relatively few examples of generative AI use by the UK screen sector are either publicly known or identifiable. However, our research and interviews have uncovered a wide variety of applications across film, television and video game production. We therefore characterise the use of generative AI in the UK screen sector as being like an iceberg, with the greatest volume of activity located beneath the surface. Several reasons explain this situation: many use cases are at an experimental stage so have not been widely publicised yet; the technology is currently better suited to pre-production tasks (such as ideation and concept development) or post-production and VFX workflows, so uses are not overtly visible onscreen; and there are ethical, legal and reputational concerns about the use of generative AI, particularly in final creative outputs, which make individuals and organisations hesitant to use the technology in certain ways or discuss how they use it. (These issues are explored further below, and in more detail in **Section 2**, page 21.)

In the UK screen sector, current applications of generative AI can be mapped to three broad objectives – as outlined by France's CNC in an April 2024 report on the impact of AI on the audiovisual sectors – which sees AI being used to:

- Drive efficiencies
- Stimulate creativity
- Open new possibilities

Drive efficiencies

Generative AI is deployed as a tool for automating repetitive tasks or speeding up otherwise time-consuming and costly processes (Price 2018). UK game developer Revolution Software used a type of generative model (a generative adversarial network) to upscale thousands of pieces of low-resolution artwork to native 4K resolution in the remake of its *Broken Sword* game. Studio co-founder Charles Cecil described this as removing the "drudgery" of the upscaling task (Tucker 2023). London-based VFX and virtual production supervisor Gianluca Dentici describes "tedious processes like rotoscoping" – a technique to extract characters or objects from one scene or background and overlay them on another – as being made more efficient with the aid of AI automation.

The benefits of this type of AI automation are echoed by creators outside the UK. Gints Zilbalodis, the Latvian director of Oscar-winning animation *Flow*, says: "We have methods that take a long time and are very boring to do, and AI can help us improve these kinds of technical or artistic problems… Currently I'm working on a project with [French animator and director] Michel Ocelot which will use AI for the final step in the animation process. The style requires an almost acrylic paint look, having that realistic feel while keeping the brush strokes – so that might be a good example of using [AI] as a tool" (Gill 2025).

Generative AI is also being deployed to bring early-stage concepts to life. Text and image generators speed up and reduce the costs of producing initial designs to present to potential partners. Use cases include the creation of pitch decks, which Jonny McCausland, development lead at Hat Trick Lab, an arm of Hat Trick Productions, describes as a common "entry point" in AI adoption.

These three quotes demonstrate how a diverse group of creatives, artists and technical specialists are finding ways to drive efficiencies by applying generative AI at different stages and across different types of production, freeing up time to focus on higher-level, value-added work. In Revolution Software's case, using generative AI to help with upscaling allowed artists to spend their time "adding the expressions and the character and all of those good things", says Charles Cecil (see **Case study: AI and video game remakes**, page 20).

Creatives are also attempting to find efficiencies from the use of generative AI in administrative tasks. We see large language models (LLMs) being used for text editing purposes – to improve grammar and sentence structure, consistency of tone and to meet word count limits when applying for funding, for example. Neurodivergent creatives, and creatives for whom English is not their first language, have described generative AI applications like Grammarly as accessibility tools. But benefits must be considered alongside potential downsides: for example, academic studies have found that LLM-based tools can lead to the production of more homogenised, "less semantically distinct ideas" (Anderson 2024), and Arts Council England (**artscouncil.org.uk**) notes that "use of these tools can lead to the submission of applications with similar language and text, which can distract from an application's unique proposition".

Over the period August/September 2023 to March 2025, approximately 8% of more than 3,000 UK-based fund applicants to the British Film Institute (BFI) reported using AI to complete their submissions. Data in **Table 1** (page 13) shows a steady increase in this use case over reporting waves. In comparison, less than 2% of fund applicants reported any intended use of AI in project outputs. Follow-up surveys are not conducted by the BFI to ascertain final levels of AI use by successful applicants. However, a survey by the Flemish audiovisual fund, VAF, found a lower level of AI use in completed projects (22%) versus those at application stage (28%). VAF's study concluded that, to date, AI is "mainly used to assist with administrative and technical tasks" and that this "primarily involves the use of text tools like ChatGPT" (Vlaams Audiovisueel Fonds 2025).

Meanwhile, a 2023 survey by UK producers' alliance Pact asked 10 producers about their use of generative AI and found that seven had used it in development and pre-production, and five had used it for post-production and for other tasks including image generation and transcription. Eight producers said generative AI had made their organisation "more efficient" (Pact 2024).

Efficiency gains from the use of generative AI may be perceived as a win for the UK screen sector. However, questions have been raised about the impact this may have on the existing workforce. Generative AI, in its current state, is most efficient at tasks that are frequently the responsibility of junior or entry-level workers, as noted by studies conducted by CNC and CVL Economics, and the concern is that if generative AI automates entry-level jobs and tasks, it will limit routes into the screen sector, restricting career opportunities as well as "exposure to key processes", "professional networks" and the development of "domain knowledge" (CNC 2024b; CVL Economics 2024).

	Application period			
	August/ September 2023 - March 2024	April 2024 - September 2024	October 2024 - March 2025	Total
Did you use Artificial Intelligence, or a tool based on it, to complete this application?	%	%	%	%
Yes	4.6	7.6	10.1	8.1
No	94.1	91.2	88.0	90.5
Unsure	1.4	1.2	1.8	1.4
Are you applying for funding for a project that contains outputs (e.g. script, completed film, events, screenings and related activity) from Artificial Intelligence, or a tool based on it?	%	%	%	%
Yes	1.8	2.0	1.1	1.7
No	95.9	96.9	97.7	97.1
Unsure	2.3	1.1	1.2	1.3

Table 1. Reported and intended use of AI by BFI fund applicants, August/September 2023 to March 2025.
Source: BFI. Based on 3,257 application records (Aug/Sept 23 to Mar 24 = 438; Apr 24 to Sept 24 = 1,665; Oct 24 to Mar 25 = 1,154).

Stimulate creativity

Generative AI is driving filmmakers and game developers to explore new creative development processes. For creatives like UK artist Eric Drass, these tools are playing the role of "artist's assistants" (Drass 2024). One British producer has spoken of using generative AI to voice characters at the script development stage, to help bring character dialogue to life. American comedy writer Fred Graver takes a similar view of these tools as "brainstorming partners, not replacements" (Graver 2025).

Turning ideas into reality is one of the fundamental challenges of any creative or storytelling endeavour but this can be prohibitively expensive without access to resources and financing. Generative AI is helping remove some of these hurdles to creative expression. Tom Paton, the UK-based director of the AI-generated film *Where the Robots Grow*, says that with AI, "we're able to break down barriers that have kept so many creators on the sidelines" (Fink 2024). Generative AI is also recognised for its potential to support the emergence of new creative voices. The Charismatic consortium, launched in April 2024 with the backing of Channel 4 and Aardman Animations and £1 million in Innovate UK funding, is looking to understand "how we make cutting-edge transformative tech like AI accessible to all creators, irrespective of experience or budget". A key element of the consortium's work is "to support creators disadvantaged through lack of access to funds or the industry to compete with better funded organisations" (Channel 4 2024).

As in the United States, AI-first creative studios have started to emerge in the UK. These companies seek to remake existing models of screen content production by embedding AI throughout the process. "Traditional creative pipelines are too slow, expensive, and gatekept for the pace of AI-native storytelling," says Justin Hackney, a co-founder of London-based AI studio Wonder, which secured £2.2 million in pre-seed funding in April 2025 (Cendon Garcia 2025).

New types of storytelling are also being realised through generative AI capabilities, offering new forms of expression for creatives. Adam Cole (**adamcole.studio**), a UK-based artist, won the 2024 SXSW XR Audience Award for his installation, *Kiss/Crash* (**kiss-crash.com**), in which AI melds images of head-on car crashes into those of people kissing. "I'm very interested in AI both as a tool and as a new material: one with its own capabilities, but also a tradition," says Cole. "We talk about [AI] as this radically new thing that came from nowhere, likely because that's how it's marketed by tech companies, but it's really tied to this history of images that has its own baggage and also its own potential."

AI-stimulated creativity is expected to lead to a rapid increase in the amount of audiovisual content being produced. Doug Shapiro, a former chief strategy officer for Turner Broadcasting System, thinks generative AI will trigger "a tsunami" of content that is self-produced and self-distributed by individuals or independent teams of creators (Shapiro 2024; 2025), while one former studio executive shared their view that "there are going to be very small teams of creators who can churn out stuff that audiences like more than the bigger budget studio stuff".

In the UK, this may mean that generative AI tools support the emergence of successful new and distinctly British creative voices who are able to realise their visions with only modest budgets. One senior technologist sees "an enormous opportunity for the creation of new types of product, with new types of IP owner". But, for many creatives, concerns about the unauthorised use of copyrighted material in AI model training need to be addressed first before AI-generated outputs can be fully embraced. UK animation studio Blue Zoo (**blue-zoo.co.uk**), for example, says it may use generative AI "when brainstorming or creating mood boards … to help explore and communicate ideas" but it "will not use AI trained on unauthorised copyrighted artwork to generate content that will appear in final deliverables".

UK creatives may also need to guard against homogenisation and "cultural flattening" (Stasiuk 2025) arising from widespread use of generative AI models, many of which have been developed by US companies and trained predominantly on US-centric content, which may skew outputs towards US cultural norms (Walker Rettberg 2024). The UK currently lacks its own large-scale foundation models, so domestic creators will often find themselves using AI tools and platforms built on technology that has been designed and trained elsewhere, to different standards and regulatory frameworks. Katharina Viken, co-founder of Metrotone (**metrotonemedia.com**), a UK-based AI film and TV studio, said during a May 2025 Cannes Film Festival panel: "I would be very happy if the UK actually made something that's sovereign, something that's local to the UK, because right now – as a maker – I am using US models, I'm using Chinese models" (ScreenUK 2025).

Open new possibilities

In the UK screen sector, generative AI models and capabilities are integrating with other machine learning techniques to deliver new and enhanced applications, novel problem-solving approaches and new creative technology businesses. Examples include Flawless (**flawlessai.com**), a company co-founded by British film director Scott Mann, which visually dubs films by applying 3D facial tracking and generative models to synchronise actors' mouth shapes and movements to different words and languages. Mann has described traditional dubbing methods as "limited and broken" and sees visual dubbing – or "vubbing" – as preserving a more "authentic representation" of the filmmaker or actor's work (Macaulay 2025).

Belfast-based Humain (**humain-studios.com**) brings together performance capture and AI models in the design and creation of realistic digital humans, including those developed for video game titles *Avowed*, *Microsoft Flight Simulator 2024* and *Warhammer 40,000: Space Marine 2*. And London-based Metaphysic (**metaphysic.ai**) used generative AI to digitally de-age the cast of the 2024 film *Here*. The company innovated a "youth mirror" system to allow *Here*'s actors to see their younger selves on screen with only a two-frame delay.

Alongside these new approaches to shaping what audiences see on screen are applications of machine learning and generative models that analyse, describe and transcribe screen content, and document it in the form of metadata for further analysis. Within the BFI National Archive, for example, LLMs, vision models, and methods of natural language processing are being deployed to make content more accessible (through automated subtitling) and discoverable (through automated video descriptions and by cross-linking key terms to Wikipedia articles or other relevant sources). Meanwhile, at the BBFC (2024), generative AI is being tested for deployment as part of its age ratings process, supporting the work of compliance officers by identifying "key classification issues in video content" – such as instances of swearing, sex or violence – "and tagging those issues for further viewing or final classification".

For audiences, generative AI offers the possibility of more interactive or reactive experiences. Two UK-developed video games, *Dead Meat* (**meaningmachine.games**) and *1001 Nights* (**1001nights.ai**), employ language models (and, in the case of *1001 Nights*, image generation models) to give players more control over dialogue and gameplay interactions. At a BAFTA screening in January 2025, the Los Angeles-based company Pickford demonstrated an interactive animated TV show in which audience reactions and suggestions are filtered through an LLM to change story elements in real-time (Piron 2025). And at Royal Holloway, University of London in May 2025, a CoSTAR AI Conjuring demo deployed AI-created images to support an evolving, reactive narrative in an experience that blended "live audience participation, AI-driven visual generation, and improv storytelling" (Nelson-Tabor 2025).

These examples show the emergence of innovative technologies, businesses and storytelling experiences, underpinned by generative AI capabilities. Such innovations represent growth opportunities for the UK screen and creative technology sectors. Other similar innovations will likely benefit from targeted funding and support as they look to commercialise and further develop their offerings.

Below:
Installation of *Kiss/Crash* (2023) by Adam Cole (**adamcole.studio**).

1.3. A large 'flywheel' of experimentation

Experimentation is a feature of the generative AI use cases being developed and deployed within the UK screen sector, whether the objective is for generative AI to drive efficiencies, stimulate creativity, or open new possibilities. Surveys conducted by the BFI of seven members of the Screen Sector Task Force (a group of leading voices within the UK screen sector) and 27 creative technologists affiliated with the Frame:work and Starting Pixel communities found AI in use, or being tested and developed for use, across 2D and 3D design, video editing and creation, animation, music creation and other workflows. But respondents cited skills shortages within the sector as a barrier to growth of AI, suggesting that there is insufficient AI expertise to go around, and that more effective mechanisms need to be found to facilitate AI knowledge sharing and upskilling.

UK screen sector organisations are at different stages of experimentation. One UK-based production company head, for example, described being at an "exploratory" stage in early 2025, feeling as if they were lagging behind, and looking to meet with external experts to figure out what AI might mean for their organisation. Others are at a more advanced stage: the BBC, for example, is following a "scan > pilot > scale" approach to AI adoption (as outlined in the UK government's *AI Opportunities Action Plan*; Department for Science, Innovation & Technology 2025). It has commissioned 12 pilot projects and, as of January 2025, was "fast-tracking" a number of those into production "where we believe it is safe and valuable to do so" (Talfan Davies 2024; 2025a).

The UK has a strong foundation of AI and technical expertise. *The Coronation Challenge CreaTech Report* identifies more than 13,000 creative technology companies based in the country, including more than 4,000 businesses focused on applying emerging technologies to drive business value across film, games and other sub-sectors (Easton 2025). UK creative technology firms include VFX studio Framestore, virtual production and "visual experience" technology provider Disguise, and virtual world builder Improbable. **Table 2** (page 18) lists the highest valued generative AI companies with UK headquarters (all in London) operating within the media market. And there are examples of cutting-edge research being spun out of universities to drive new AI-enabled creative technology businesses, including DAACI, which offers tools for editing and generating music and syncing it to video (Lyske 2018), and digital humans company Humain (Maguire 2019).

The challenge is to develop more of this AI and technical expertise, or find ways for screen sector organisations to access existing expertise and gain support, where needed, for experimentation and innovation. Many of the BBC's generative AI projects depended on "entrepreneurial individuals in the business who are enthused by the technology and could drive [the projects] forwards", says Peter Archer, generative AI

programme director at the BBC. But few screen sector organisations compare with the BBC in terms of workforce size, and may not have access to the necessary AI skills or capabilities. Dr Jodi Nelson-Tabor, head of Final Pixel Academy, says that "without broader talent capable of bridging creative and technical domains, the deployment of … innovative tools risks remaining niche, limiting their broader impact and commercial viability" (Nelson-Tabor 2025).

Company	Specialism	Launch date	Valuation
Synthesia	Video generation	April 2017	$2.1bn (£1.7bn)
Stability AI	Video, audio, 3D and text generation	November 2019	$1.0bn (£0.8bn)
VEED.IO	Video generation	March 2018	$210m (£165m)
Papercup	AI dubbing	November 2017	$120m (£94m)
Haiper AI	Video generation	2021	$83m (£65m)

Table 2. Top UK-headquartered generative AI companies operating within the media market, by valuation (as of January 2025).
Source: Dealroom (dealroom.co). Exchange rate £1 = $1.2707, based on HMRC published exchange rate for January 2025.

Further reading

Advanced Machine Learning in Film Production
A publicly accessible, work-in-progress framework examining the use of AI tools across filmmaking stages, from pre-production to post-production. It classifies the input-output types to identify the tasks these tools can perform and, based on these types, explores the corresponding technologies and models underpinning them. The project also investigates real-world use cases to understand the role of AI in filmmaking, using information from online and academic sources.
costarnetwork.co.uk/resources/advanced-machine-learning-in-film-production

British TV and AI: explore and exploit
Alex Connock, a Saïd Business School senior fellow and head of department in creative business at the UK's National Film and Television School, describes how British TV is "exploring the frontiers of AI creativity – in synthetic humans, AI agents, the use of LLMs and camera-less innovation".
doi.org/10.3389/ejcmp.2024.13225

AI 101: How AI is Actually Used in the Video Games Industry
Game AI developer and consultant Tommy Thompson presents an overview of how symbolic AI and machine learning – including deep learning and generative AI – are used within the video games industry in 2024.
aiandgames.com/p/how-ai-is-actually-used-in-the-video

Case study: AI in screen archives

The BFI National Archive has been experimenting with large language models, vision models, and established natural language processing methods, to assess their usefulness for enhancing and augmenting collections data. After this experimental phase, the team intends to build an inference pipeline to connect these services, and to deploy to an Nvidia H-100 GPU in the Archive network.

The experiments focus on three areas:

Speech-to-text
Testing OpenAI's Whisper and various derivatives – such as WhisperX – as well as alternative models like Nvidia's Parakeet, to run speech-to-text on files from digitisation of videotape from the national television collection. The aim is to generate a WebVTT subtitles file to enhance accessibility on digital platforms, and to generate a text output to pass into the next service.

Named entity recognition (NER) and wikification
Using spaCy for NER, and passing extracted entities to EntityFishing or ReFinED for Wikidata/Wikipedia matching. The aim is to utilise the speech-to-text from videotape digitisation above, plus subtitle text from automated off-air TV recording, to explore the creation of a semantically enriched search and discovery approach for the national TV collection.

Video understanding and description
Experimenting with Google Gemini 1.5 Pro to catalogue, shortlist and contextualise moving image content from the collection. The team provided examples of cataloguing and achieved promising results from Gemini, and is now looking to expand this experiment and replicate it with open models in the Archive network, as video understanding becomes stronger in open models – such as Qwen2-VL or LLaVA-Video. The aim is to augment historically variable documentation to enhance search and discovery of key BFI National Archive collections.

By Stephen McConnachie, head of data and digital preservation, British Film Institute

Case study: AI and video game remakes

The first instalment of the *Broken Sword* series of adventure games was released in 1996, and when developers Revolution Software set about remaking the original game for its "Reforged" edition, they used generative AI models to help make the visuals "fit for 2025", says studio co-founder Charles Cecil.

Broken Sword's original sprite artwork was created for VGA monitors with a resolution of 640 x 480 pixels, and the aim was to upscale to render natively at a 4K resolution of 3,840 x 2,160 pixels. Generative adversarial networks (GANs) were employed to assist with this upscaling process, and "it worked well where we had huge amounts of data", says Cecil. "For our main hero character, George, we had several thousand sprites, and the GAN started doing a fairly good job because it had so much training data that it could then build on that."

The model outputs weren't perfect, even for George, says Cecil. "It could never get the hands or the heads right. So, basically, what we did, as far as possible, was to upscale, get the line around the outside [of the character], and then an artist would go in, tweak it, stick the head on, put the facial expression on – all of those things."

"Generative AI is a tool like any other tool, and it's incredibly valuable," says Cecil. "But where it mines data from the internet without any regard for intellectual property, then it is morally dubious."

2. Barriers and challenges to AI adoption

Summary

Adoption of generative AI within the UK screen sector raises legal, ethical, and practical challenges that need to be addressed to ensure sustainable and equitable integration. The primary issue in the first half of 2025 is the use of copyrighted material to train generative AI models – including more than 100,000 film and TV scripts (Reisner 2024). In the vast majority of instances, copyrighted material has been used without the permission of rightsholders, and creators have not been paid for this use of their works. AI developers including OpenAI (2025) and Google (2025) advocate for broad text and data mining exceptions to allow training on copyrighted material to continue unimpeded, while the UK Creative Industries push for stronger copyright protections (ITN 2025). Proposed solutions to this issue include licensing copyrighted material for AI training (see Figure 3, page 26) and ensuring transparency in AI training data.

Rights concerns dominate now, but other issues loom (see Table 3, page 24):

- AI's ability to automate tasks raises fears of **job losses**, particularly for junior or entry-level positions, and a CISAC (2024) study suggests audiovisual creators risk losing 21% of their revenues by 2028 as the market for AI-generated content grows. Training and upskilling are seen as essential to prepare the workforce for AI integration, but a BFI survey of creative technologists found AI training to be more "informal" than "formal", while a survey of creative workers by Creative Informatics pointed to "lack of funding" as a barrier to AI training (Black 2024).

- Computational resources required for training and operating AI models result in high energy consumption and **carbon emissions**, challenging the screen sector's sustainability goals. A *Nature* article reports that image generation tasks can consume up to 1,000 times as much energy as question answering tasks (Luccioni 2024). But resource usage may be hidden or obscured from AI users in the Creative Industries, according to a recent CoSTAR Foresight Lab report, prompting calls for transparent data on energy and water consumption, industry standards for clean energy use, and less energy-intensive models (Nieman 2025).

- In April 2025, the US Academy of Motion Picture Arts and Sciences said that "the degree to which a human was at the heart of … creative authorship" would factor into Oscars awards decisions. We discovered **human creative control** as an important topic across our desk research and interviews. YouGov (2025) reported that 86% of British respondents wanted AI content disclosures, and Screen Sector Task Force members surveyed by the BFI called for standards on content provenance and authenticity.

- AI models are trained on datasets that are **biased** in a variety of ways, and without adequate checks and mitigations, those biases will be reproduced in model outputs. The predominance of US-trained models risks globalising US narratives at the expense of local cultures, according to academics and UK screen sector organisations (Walker Rettberg 2024). Addressing these issues requires transparency in AI training data, participatory approaches to AI design – such as those advocated by UK innovation agency Nesta (Berditchevskaia 2021) – and fine-tuning methods that debias base models, such as "Gender-tuning" (Ghanbarzadeh 2023).

- The use of AI tools poses risks of data leakage, which may compromise commercial and personal **data security**. Developing proprietary AI models may be an expensive solution to this problem (CNC 2024b), but running open-weight models locally (as the BFI National Archive is doing; see Case study: AI in screen archives, page 19) or on managed cloud services presents a more affordable alternative.

The Creative Industries (including film, TV and video games) are identified as one of eight "growth-driving sectors" and AI as one of the country's "existing strengths" in the UK government's 2024 industrial strategy (Department for Business & Trade 2024). However, **lack of training and investment** to support AI innovation are seen as significant barriers to wider AI adoption in the Creative Industries, which may constrain economic growth. Creative Informatics highlights funding gaps at early ideation stages (Black 2024), and the House of Lords Communications and Digital Committee (2025a) points to infrastructure weakness and limited growth capital as fuelling a technology scaleup challenge. The UK boasts expertise in AI research, engineering, and filmmaking, and a reputation for merging technology and culture, according to UK creative technology businesses Metaphysic and Flawless (Davis 2020; Culture, Media and Sport Committee 2024). Combining these strengths through regional Creative AI hubs, funding for AI projects and training, and promoting AI adoption through infrastructure and support have been put forward as solutions by several reports.

Generative AI technology is not perfect but is improving in its suitability for creative tasks. Technical limitations may act as a brake on AI adoption, but common bugbears are being addressed. Runway's latest generative video model, for example, promises consistent characters and scenes (Runway 2025), and Google's Veo 3 video model generates audio natively (Hume 2025). UK-based creators such as Meaning Machine are exploring the potential for running smaller models locally, fine-tuned for specific tasks, to remove cost and latency issues associated with cloud-based services (Burnes 2025). Collaboration between creatives and technologists to shape AI development (Inie 2023), inclusive approaches to AI design (Green 2025), and fine-tuning models for creative needs are increasingly recognised as essential for the successful integration of generative AI in the screen sector. However, further research is needed to understand how many creative organisations are actively engaged in the development of creative AI tools, and how many are instead using off-the-shelf products and services.

2.1. Rights dominate now, but other issues loom

AI experimentation in the screen sector is taking place under fraught conditions. While generative AI presents opportunities to drive efficiencies, stimulate creativity, and open new possibilities, it raises a multiplicity of legal and ethical issues for the screen sector.

Copyright is the dominant concern in early 2025. Many of the generative AI models in wide use today have been trained on copyrighted material without the permission of rightsholders or any form of payment to creators. For screen sector organisations, this prompts difficult questions about whether they can (legally) and should (morally) use generative AI outputs in their own processes and productions. The CEOs of international video games developers and publishers, for example, have spoken of the potential for AI to make development "more efficient", while acknowledging that generative AI is "tricky when it comes to legal IP ownership" and that it needs to "make sure that it respects others' intellectual property and allows us to protect our own" (Chalk; Blake 2025).

Besides rights issues, the screen sector is wrestling with concerns relating to job security, the risk of cultural homogenisation, and negative sustainability impacts from use of generative AI tools. Drawing on international reports, surveys, and interviews conducted for this report, we have mapped the current legal and ethical landscape in Table 3 (page 24).

Below:
Screenshot from *1001 Nights* by Yuqian Sun / Ada Eden (1001nights.ai).

Issues	Risks	Solutions
Copyright	• Models trained on copyrighted works replace or compete with original creators, leading to loss of earnings and jobs, and devaluing of IP creation. • Infringing material "regurgitated" in AI-generated outputs.	• Licensing of copyrighted material for AI training. • Payment to creators for agreed use of material in AI training. • Transparency in AI training data, to check for copyright infringements. • Model guardrails to prevent copyright infringements in AI-generated outputs.
Employment and training	• Loss of jobs/income through AI automation. • Impact on junior or entry-level jobs restricts pipeline of talent for mid-level and senior roles. • Skills shortages for AI-supported or specialist roles.	• Industry-wide training and reskilling to meet demand for new AI-assisted or AI-related roles. • Funding to support access to training. • Creation of hubs or other mechanisms for knowledge-sharing, innovation and upskilling.
Carbon and sustainability	• AI use by screen sector adds to carbon emissions associated with screen production activities. • Growing adoption of energy-intensive AI models challenges screen sector's push for sustainable production.	• Transparent data on energy and water consumption associated with AI training and use. • Industry standards around use of clean energy and sustainable practices for model development and deployment. • Development and use of less energy-intensive models – e.g. small language models – for generative tasks.
Authorship and attribution	• AI replaces or competes with human creative output, leading to loss of earning potential. • Rise of AI "slop" and growth of mis- and disinformation.	• Guidelines and agreements on protection of human creativity and authorship. • Transparent labelling of AI uses to safeguard audience trust in screen content. • Verification and storage/archiving of human creative output.
Bias and cultural output	• Biased data used for training leads to biased AI outputs. • Widespread use of predominantly US-trained AI models results in cultural homogenisation and loss of diverse narratives and content.	• Transparency in AI training data, to check for biases in model inputs. • Diversity of views in model design, development and testing. • Fine-tuning to debias base models or to generate outputs with distinct written or visual styles.
Data security	• Commercial or personal sensitive data "leaks" into model training and is "regurgitated" by or for other model users.	• Safeguards/controls over use of prompts and other user inputs for AI model training in off-the-shelf tools. • Development of properietary models. • Use of open-weight models running on self-managed (local or cloud) infrastructure.

Table 3. Legal and ethical issues relating to the use of generative AI within the screen sector.

Sources include: Bergquist 2023; Black 2024; CNC 2024b; CVL Economics 2024; Nieman 2025; OpenAI 2024; Smith 2023; Vlaams Audiovisueel Fonds 2025.

Copyright

The existing training paradigm for generative AI models poses a threat to the fundamental economics of the screen sector and its ability to create value from making and commercialising new IP. Sources of AI training data include scripts from more than 130,000 films and TV shows, YouTube videos, and databases of pirated books (Longpre 2025; Reisner 2024, 2025; Sato 2024). As generative models learn the structure and language of screen storytelling – from text, images and video – they can then replicate those structures and create new outputs at a fraction of the cost and expense of the original works (Cendon Garcia 2025). These learned capabilities can be used to assist human creatives, but AI tools may also be used to compete against the original creators whose work they were trained on.

AI model developers have, in some instances, struck licensing deals with rightsholders to use their content for training purposes. The Centre for Regulation of the Creative Economy (CREATe) lists 79 deals over the period March 2023 to February 2025 (see **Figure 3**, page 26), with more than half signed by Perplexity and OpenAI, 70% relating to news content and 15% to image banks (**Table 4**, page 26). However, the default position of many AI developers is that they should be free to train models on copyrighted content without licences or payments to rightsholders. Songwriter Elton John has described this as "thievery on a high scale" (Kuenssberg 2025).

OpenAI (2025), for example, has called for a broad text and data mining (TDM) exception for AI training in the UK – meaning that copyrighted works found on the open web can be used in model training without the express permission of rightsholders. In the US, developers make arguments for free use of copyrighted works under the country's "fair use" doctrine. However, judges and copyright experts have questioned how "fair" it is when models trained on copyrighted material can be used to produce competing products. In May 2025, a US federal judge was reported to have told lawyers for AI developer Meta: "You are dramatically changing, you might even say obliterating, the market for that person's work, and you're saying that you don't even have to pay a license to that person" (Brittain 2025). The same month, a report from the US Copyright Office (2025b) said that "making commercial use of vast troves of copyrighted works to produce expressive content that competes with them in existing markets, especially where this is accomplished through illegal access, goes beyond established fair use boundaries".

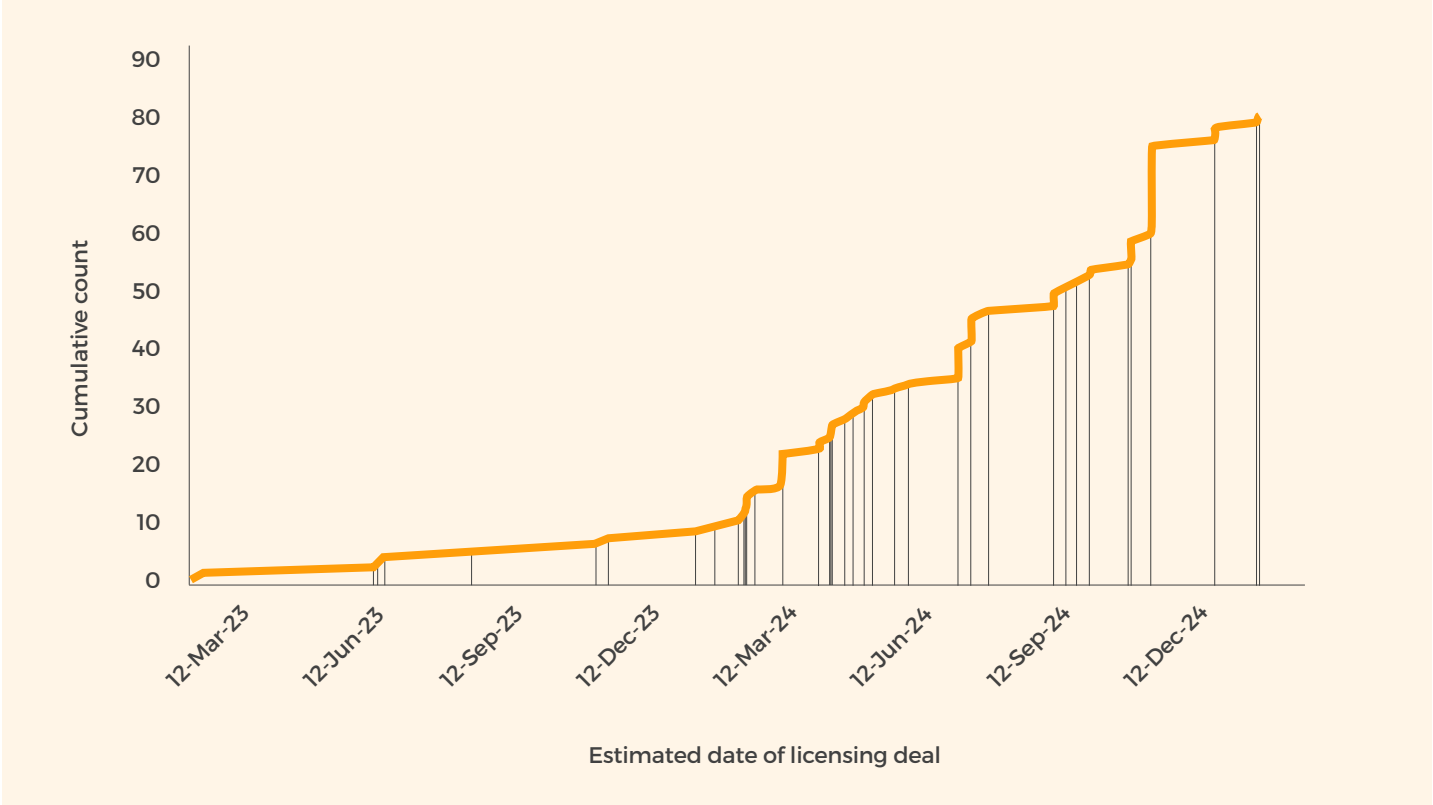


Figure 3: Cumulative count of licensing deals for AI training, identified by CREATe as of February 2025 (Thomas 2025). Dates of deals are estimated. Includes one deal in which AI training is implied (OpenAI and the American Journalism Project, July 2023). One AI training licence excluded from analysis as date of deal and purchaser are unknown.

Content type	Licensing deals
Image bank	12
Music	3
News	55
Scholarly	4
Social media	5
Total	**79**

Table 4. Count of licensing deals for AI training by content type, identified by CREATe as of February 2025 (Thomas 2025). Includes one deal in which AI training is implied (see Figure 3 caption for further information). Note that Ithaka S+R (sr.ithaka.org) tracks a greater number of licensing deals for scholarly content as of May 2025.

In the UK, the AI and copyright debate has focused on a proposal by the government to allow AI developers to train on copyright works unless rightsholders expressly refuse (Intellectual Property Office 2024). This represents a significant change to the country's existing copyright framework, under which "copying works to train AI models requires a licence from the relevant right holders unless an exception applies."

Neither the Creative Industries nor AI model developers are in favour of the government's opt-out proposal (Williams 2025). OpenAI (2025) and Google (2025) have publicly stated their support for a TDM exception, whereas the Creative Industries have urged the government to strengthen the existing copyright framework and require licensing of content for AI training purposes. "We believe that AI developers should not scrape creative sector content without express permission and that a framework that supports licensing of copyright content for AI training is the best way for the UK to share in the opportunity created by AI," says a coalition of screen sector organisations, including the BBC, Channel 4, Fremantle, ITN, ITV and Pact (ITN 2025). Without such a framework, widespread scraping of copyrighted content for AI model training "could seriously undermine investments in the high-quality content that UK creative industry organisations have made", says one respondent to the BFI's Screen Sector Task Force survey.

The Creative Industries are keen to "maximise the value of their creative endeavour by reaching fair and equitable commercial partnerships with AI developers", says another BFI survey respondent. The UK is well-positioned to facilitate these partnerships, given its existing copyright framework and the presence of startups such as Human Native (**humannative.ai**), which aims to build a marketplace for AI training data. UK-based media publishers are pursuing licensing deals (Thomas 2024), including through US-based startups that are securing backing from investors (Heikkilä 2025). Meanwhile, in April 2025, the UK's Copyright Licensing Agency announced plans to develop a generative AI training licence that "will further demonstrate that licensing is the answer and can provide a market-based solution that is efficient and effective" (Cormack 2025).

Employment and training

AI's text, audio, video and image generation capabilities fuel concerns about loss of jobs and income for screen sector workers. A December 2024 study by CISAC, the International Confederation of Societies of Authors and Composers, projected that "music and audiovisual creators will see respectively 24% and 21% of their revenues at risk of loss by 2028" as the market for generative AI content grows, and a January 2024 report by CVL Economics estimated that more than 200,000 US entertainment industry jobs could be disrupted by AI by 2026.

Generative AI's ability to replicate voices, likenesses, and performances also prompts fears about job displacement and the loss of personality rights, and these concerns have culminated in strike action. A 2023 dispute between actors and Hollywood studios and streamers, for example, included objections to proposals that would allow scanned images and likenesses of actors to be used by studios in perpetuity with no further consent or compensation (Goldberg 2023). Concerns about AI and digital replicas again led to a strike by actors against video games employers in 2024, and that strike was ongoing at the time of publication (SAG-AFTRA n.d.).

AI presents both opportunities and risks for creative workers. It can be used as a tool to augment human work, or it may replace tasks and job roles entirely through automation. JT Rooney, creative producer at Los Angeles-based Silent Partners Studio, illustrates this tension through the example of a creative director using generative AI to produce a style frame for a client or customising backgrounds for a shoot, rather than hiring in more junior designers to handle this work. Anthropic's analysis of user interactions with its chatbot, Claude, suggests that "in just over half of cases [57%], AI was not being used to replace people doing tasks, but instead worked with them" to validate or iterate on their work (Anthropic 2025). The researchers speculate that as AI capabilities broaden, "new tasks and even entirely new occupations may emerge around these capabilities". This idea is echoed in a February 2025 policy brief from the University of Cambridge: "while some professions are under threat from the use of AI on the data input side (e.g., voice artists, actors, musicians); other professions are likely to emerge or be enhanced via use of generative AI in their arts" (Glenster 2025).

Workers in the screen sector are generally downbeat about job prospects in the age of AI. A 2024 survey of 39 film, TV and games industry workers by Queen's University Belfast found a clear majority disagreeing with the statement that AI technologies have "a positive impact on job opportunities within the creative sectors" (Phillips 2024). Other studies, including those by CNC (2024b) and CVL Economics (2024), raise concerns that jobs most susceptible to consolidation, replacement, or elimination by AI will be concentrated among entry-level positions, and that this will disproportionately impact workers from less affluent backgrounds and underrepresented communities.

Screen sector organisations recognise the need to train staff (including freelancers) in AI knowledge and skills in the next several years. Respondents to the BFI's survey of Screen Sector Task Force members anticipate a requirement for staff who can engage with AI at all levels, including workers (e.g., staff who use AI as part of their role), professionals (whose core responsibilities concern AI) and leaders (with responsibility for the introduction of AI technologies). However, the Queen's University survey of screen sector workers suggests that the industry does not currently provide "adequate resources for learning about AI" (according to around half of respondents). The BFI's survey of creative technologists found that AI training is currently more "informal" than "formal", and no large-scale investments in AI skills training/retraining have been identified during the research for this report. Meanwhile, a survey of creative workers in Scotland by Creative Informatics points to "lack of funding" as a major barrier to AI training (Black 2024).

These data points suggest a fast-growing need for a detailed mapping of how AI intersects with screen sector roles and its impacts on skills requirements, as well as the development of cross-sector training opportunities and funded placements, which may be of particular benefit to the UK screen sector's majority freelance production workforce (Cade 2024).

Carbon and sustainability

Training and operating generative AI models requires significant computational resources, resulting in high energy consumption and associated carbon emissions. Without concerted action to make AI development and deployment more sustainable, growing use of generative AI for film, TV and video game production may increase the screen sector's carbon emissions.

One major challenge in understanding the environmental impacts of AI use is a lack of comprehensive data on resource consumption (Nicoletti 2025). Academic studies have looked at how much energy is used in the training of certain AI models (Luccioni 2022). They have also compared energy use associated with different model tasks – such as text generation versus image generation. A study published in *Scientific Reports* found that "the combined impact of training and operation for ChatGPT amounts to approximately 2.2g CO_2e [carbon dioxide equivalent]" per user query (Tomlinson 2024), while a *Nature* article reported that image generation tasks can consume up to 1,000 times more energy than question answering tasks (Luccioni 2024). However, a recent CoSTAR Foresight Lab report concluded that the "infrastructure of AI – and information about its environmental impacts – may be hidden or obscured from end users in the Creative Industries" (Nieman 2025). Screen sector organisations such as Blue Zoo (**blue-zoo.co.uk**) prioritise running AI models on their own local or cloud infrastructure for this reason: in these managed environments, "we have full visibility of the energy usage and choice of energy providers".

Organisations such as the Oeko-Institut in Berlin want AI applications to be subject to regulations that insist on accurate provision of their environmental impact, just as a new fridge needs to display an energy efficiency label (Gröger 2025). The CoSTAR Foresight Lab report made similar calls for transparency around energy and water consumption (Tarnovskaya 2025), as well as:

- strengthening sustainable AI regulation and governance;
- promoting green AI certifications;
- using clean energy for training models;
- minimising computational costs by adopting energy-efficient models;
- adapting pre-trained models to new tasks/domains; and
- making data centres more efficient.

Authorship and attribution

Safeguarding the primacy of human creative control is of vital concern for screen sector workers amid growing adoption of generative AI tools. The 2023 Hollywood writers' strike concluded after 148 days with an agreement that AI cannot be considered a "writer" nor own copyrights, that writers must be paid for AI-assisted work, and that writers may use AI but cannot be forced to do so (Writers Guild of America West 2025). In the UK, the Writers' Guild of Great Britain has articulated a comprehensive stance on the use of AI in the Creative Industries, emphasising the protection of the rights and intellectual property of writers. Key aspects of its guidelines include proper attribution for authors when AI-generated content is derived from existing works, and clear labelling of AI-generated content.

Audiences are also demanding transparency around use of AI, particularly as the volume of so-called "AI slop" increases (Hoffman 2024). A survey by YouGov, conducted between December 2024 and January 2025, found 86% of British respondents, and 75% internationally, in favour of disclosures where generative AI has been used to create content, and a 2024 survey for the BBC reported that audiences "want to know when media is 'AI-assisted' and if it has been 'human-verified'" (Archer 2024).

Misuse of AI – including the creation of deepfakes and misinformation – is recognised as a major reputational risk for brands and organisations (The Global Situation Room Inc 2025). Respondents to the BFI's survey of Screen Sector Task Force members highlight the risks of mis- and disinformation in generative AI outputs, and call on regulators to explore standards around content provenance and authenticity, which will play "an important role in supporting trust" in screen content.

Demonstrating human authorship is also a prerequisite for securing copyright protection in the US for AI-assisted works, as in the case of Invoke's artwork, *A Single Piece of American Cheese* (Keirsey 2025; see also United States Copyright Office 2025a). And for awards recognition, the US Academy of Motion Picture Arts and Sciences (2025) has said that it will consider "the degree to which a human was at the heart of the creative authorship" when choosing which movies to award Oscars.

Together, these positions and perspectives align with the UK screen sector's ambition for generative AI to enable human creativity, rather than replace or devalue it (Pact n.d.). They also caution organisations and individuals to be wary of any perceived sidelining of human agency in the process of screen content production.

Bias and cultural output

Datasets used to train generative AI models contain biases. Training sets largely consist of human-generated creative works, and these works capture the underlying biases of their creators. The selection of what data to include in training sets is also subject to the biases of AI developers and their determination of what is most important or valuable for their model.

These layers of bias are encoded in model parameters and, without adequate testing and mitigation, may be manifested in model outputs – leading, in some cases, to distorted or biased presentations of different peoples, cultures and ideas. Image generators, for example, have been shown to have "systematic gender and racial biases" in their outputs, specifically that "women and Black individuals are significantly underrepresented" (Zhou 2024). Text produced by LLMs has demonstrated similar biases (Fang 2024). Such biases – if unchecked – risk appearing in screen sector outputs, further replicating and reinforcing biases and misrepresentations.

Within the screen sector, guidelines are being developed that acknowledge the risk of bias and seek to promote responsible use of generative technologies (Ruszev 2024). The Archival Producers Alliance (2024), for example, advises filmmakers that "GenAI encodes every bias of its dataset" and that "most GenAI models draw from an incomplete version of the historical record". It warns of the danger of synthetic material being passed along and "forever muddying the historical record".

Use of generative AI may also contribute to a homogenisation of cultural output. The predominance of US-trained models could lead to "a globalisation or Americanisation of content", says a respondent to the BFI's Screen Sector Task Force survey: "Much of the value of the UK creative sector is [in] portraying British identity both to UK audiences and to the world. A homogenisation of this content would result in a tangible loss of value for the UK creative sector." Norwegian academic Jill Walker Rettberg (2024) echoes concerns about homogenisation and the "loss of diverse cultural narratives, content, and heritage". Sasha Luccioni, a research scientist at AI community Hugging Face, says that, with AI model outputs, "We are essentially projecting a single worldview out into the world, instead of representing diverse kinds of cultures or visual identities" (Nicoletti 2023).

Risks of bias and homogenised cultural output require the UK screen sector to reflect on how models are built and used. The innovation agency Nesta, for example, advocates "participatory" approaches to AI design, which involve "a wider range of stakeholders than just technology developers in the creation of an AI system, model, tool or application" (Berditchevskaia 2021). Designing generative AI models for the screen sector should therefore involve both creative professionals and screen audiences, to provide a counterweight to the biases of model developers and their choice of training data (Tarran 2023). It should also involve the use of balanced training sets – FairFace (Karkkainen 2021), for example, has been shown to improve the classification accuracy of computer vision models – while a 2023 research paper proposes a fine-tuning approach called "Gender-tuning" to debias pre-trained language models (Ghanbarzadeh 2023). Fine-tuning models using specific (licensed) catalogues of text, images or videos can also shape outputs to reflect a more distinct visual or written style. The BBC, for example, is fine-tuning large language models to reflect the corporation's editorial standards.

Data security

Screen sector organisations have a plethora of generative AI tools to choose from at different stages of production (Huang 2025), and the decision of which tools to use must include consideration of data security. Terms and conditions of many AI tools, particularly free-to-use tools, may permit the AI developer to reuse prompts and other inputs for training or model improvement, but this poses a risk that commercially sensitive data, including IP, may leak out to other users of an AI tool (Tozzi 2024).

In the UK, our research and interviews surfaced only limited discussion of data security issues, including one virtual production technology vendor who referred to AI audits

undertaken by their clients' data security teams. Limited discussion may indicate that screen sector representatives are aware of the risk of data leakage and confident in how to manage it. But it may also point to a lack of due consideration, as is suggested by a survey of applicants to the Flemish audiovisual fund, VAF: it found widespread use of free tools across projects that employ AI but a weak grasp of associated terms and conditions – for example, 18 out of 22 AI users indicated that they did not know whether their chosen tool granted IP rights to model outputs (Vlaams Audiovisueel Fonds 2025).

Building proprietary AI models ensures "a maximum level of [data] security and confidentiality", notes a report by French screen agency CNC (2024b). However, this approach may be cost-prohibitive for all but the largest organisations. A more accessible alternative is running open-weight models locally or via managed cloud services within custom-built workflows. While this requires investment in infrastructure and technical expertise, it offers greater control over data and mitigates the risk of it being scraped for model training. This open-weight approach has been adopted by the BFI in its National Archive team (see **Case study: AI in screen archives**, page 19) and could be pursued by other screen sector organisations. However, many would benefit from targeted funding and technical support to develop their own AI workflows. For example, the BBFC (2023) received Innovate UK funding and worked with Amazon Web Services to develop a bespoke AI tool for content tagging.

Below:
Still from *Window Pane* (2025), an AI-generated short film, by Holden Boyles / The Ambiguous Company (**theambiguous.co**).

2.2. Lack of training and investment hold back AI adoption and growth

The Creative Industries (including film, TV and video games) are identified as one of eight "growth-driving sectors" and AI as one of the country's "existing strengths" in the UK government's 2024 industrial strategy (Department for Business & Trade 2024). However, lack of training in AI and limited investment to support AI innovation are cited as barriers to wider adoption of AI within the Creative Industries, which may constrain economic growth. Creative Informatics identified funding for AI projects and training as a key need, while highlighting a particular funding gap "at early ideation and exploratory stages" (Black 2024). Meanwhile, academics from the University of Reading have warned that "failure to develop a national programme of AI upskilling could weaken the competitive status of the UK's screen workforce, undermining inward investment" (Purse 2023). Recruiting AI skills into the screen sector is seen to be a challenge due to the significant salary gap between film and TV companies and AI firms – making it all the more crucial to train and upskill the existing screen workforce (Culture, Media and Sport Committee 2025).

Support for AI innovation needs to work together with the promotion of AI adoption, according to a February 2025 report from the House of Lords Communications and Digital Committee. The report found that the UK has a "vibrant startup environment" but "a technology scaleup problem", with "poor infrastructure, a culture of risk aversion, and comparatively limited domestic growth capital" making it difficult for homegrown businesses to continue to grow within the UK. It also pointed to "comparatively low levels of AI adoption and public trust in AI technologies" as a key challenge.

The UK is seen, broadly, to have strong competencies in both AI and screen production. There are "extensive technical skills in AI in UK research institutions", according to the Creative Industries Policy and Evidence Centre (Davis 2020); the country has "a good brand as a place to come if you want to combine technology and traditional culture", says Martin Adams, co-founder of Metaphysic; and the UK is in an "exceptional position" when it comes to both engineering and filmmaking skillsets, says Nick Lynes, co-CEO of Flawless (Culture, Media and Sport Committee 2024). The opportunity, therefore, is to find ways to bring these capabilities together and spur new, funded, development opportunities.

Studies have put forward solutions to support innovation, upskilling and adoption of AI and other creative technologies. Creative Informatics recommended the establishment of regional Creative AI hubs to broker relationships "between creative SMEs [small- and medium-size enterprises] and freelancers with necessary infrastructure, funding opportunities, training and skills development, and peer support" (Black 2024). And the *Coronation Challenge CreaTech Report* called for a new Innovate UK-funded "CreaTech Catapult", which would serve as "a hub for cutting-edge experimentation, knowledge transfer, and collaboration, propelling [UK] businesses into global leadership roles" (Easton 2025).

2.3. The technology is not perfect but is improving

Not all generative AI tools are well-suited to the needs of production workflows. General-purpose AI models have wide-ranging capabilities but may not be optimised for specific creative tasks. Game AI developer and consultant Tommy Thompson (2024b) compares the use of some off-the-shelf generative AI tools in game development to "square pegs being slammed into round holes". Image generators, for example, typically export flat image files, "which [are] generally kind of useless in a game development situation", says Thompson, as developers are not able to manipulate the various layers of the image. Filmmakers also point to a lack of consistency in generative model outputs. Cody Updegrave of The Ambiguous Company describes generative video as "pure improv" in terms of character design and movement.

Current technical limitations may act as a brake on AI adoption. But it would be unwise to assume that developments will stall or that applications of generative AI in screen sector contexts will fail to expand. Model developers are increasingly aware of the creative use cases of generative AI and are exploring new approaches to model development and evaluation, informed by the needs of human creatives. For example, a Microsoft research team based in Cambridge, UK, built a World and Human Action Model called Muse to address limitations in model capabilities that were identified through interviews with games developers (Kanervisto 2025). In March 2025, generative video platform Runway claimed to have solved a major creative bugbear with its new Gen-4 model promising "consistent characters, locations and objects across scenes". And in May 2025, Google released Veo 3 – the first generative video model to produce audio natively (Hume 2025).

Alongside model advancements are improved model "wrappers" – custom software that allows users to interact with generative AI capabilities through user-friendly interfaces. Increasingly these interfaces are designed from an understanding of the needs and typical workflows of creators. Examples include Invoke (**invoke.com**), which began as an open-source project to develop a web-based interface for Stable Diffusion image models and is now available as a paid-for creative production platform. Entirely new products have also emerged from the collaboration between creatives and technologists. In France, for example, scriptwriter David Defendi partnered with AI engineer Louis Manhès in 2019 to create Genario (**en.genario.fr**), a writing tool for novelists. Genario has since expanded to include generative AI capabilities and now supports film and TV screenplays.

Screen sector organisations are developing their own AI applications, or fine-tuning existing models, to meet specific needs. Netflix, for example, has US patents for creating AI-generated trailers and previews (Follows 2025). French games publisher Ubisoft built an AI "Ghostwriter" to script "bark" lines – short snippets of dialogue spoken by in-game background characters in response to actions or events (Barth 2023). And Lionsgate Studios has partnered with Runway (2024) to build custom models trained on the

studio's own content. Meanwhile, Bristol-based games developer Meaning Machine, creator of *Dead Meat*, has fine-tuned a version of an Nvidia small language model to run locally on a player's graphics card – avoiding the expense and latency that would come from having the game's character dialogue generated off device, using a cloud-based LLM (Burnes 2025).

These developments point to an ongoing effort – by model developers, screen organisations and creatives themselves – to shape the evolution of generative AI to the needs of content production. Google, for instance, provided filmmakers with early access to its Veo 3-based AI filmmaking tool Flow, "to better understand how our technology could best support and integrate into their creative workflows". The active participation of creatives is to be welcomed; academics have called for "inclusive" approaches to AI development (Green 2025) and argued that "generative AI can reach its full potential only if creative professionals truly participate in its development" (Inie 2023). However, further research is needed to understand how many creative organisations are actively engaged in the development of creative AI tools, and how many are instead using off-the-shelf products and services.

There exists a certain amount of uncertainty about where AI technology may go next (Sanscartier 2025). But while screen sector workers see limitations today, they also see the potential for transformations to come. In a 2024 survey of screen sector workers by Queen's University Belfast, just over half of respondents agreed that "the next generation of AI will significantly change the creative process", and just under half agreed that innovations in AI "have the potential to revolutionise my field" (Phillips 2024).

Further reading

Time to ACCCT
A CoSTAR National Lab report, outlining a framework built around five priorities – Access, Consent, Control, Compensation and Transparency – that aims to incentivise technology companies to work with rightsholders in building a workable solution to the AI training challenge.
costarnetwork.co.uk/resources/time-to-accct

Do Britons care if a film uses artificial intelligence?
What do the public think about artificial intelligence at the cinema? YouGov data shows that nearly half of Britons say it is acceptable for filmmakers to deploy AI while making a movie (48%).
business.yougov.com/content/51704-do-britons-care-if-a-film-uses-artificial-intelligence

ProMark: Proactive diffusion watermarking for causal attribution
Creatives are "not well supported to receive recognition or reward for the use of their content" in generative AI training, but a new causal attribution technique aims to address this issue. ProMark's creators suggest that this type of attribution "offers opportunities to recognise and reward creative contributions to generative AI, underpinning new models for value creation in the future creative economy".
arxiv.org/pdf/2403.09914

3. Risks and opportunities of disruption

Summary

Our research has found that, while we cannot know for certain the exact trajectory of AI within the UK screen sector, the potential for increasing disruption is significant. While this technology presents opportunities, it also poses threats. Unlicensed training of generative AI models on copyrighted content has sparked backlash from creators, with concerns about economic harm and loss of creative control. AI-first studios such as Wonder (Cendon Garcia 2025) aim to show how AI can reduce production costs and timelines, but this raises questions about the future of traditional job roles and business models in the sector.

Generative AI is starting to reshape demand for skills. Respondents to the BFI's Screen Sector Task Force survey identify a need to equip workers with AI knowledge and skills in the next several years. Tasks such as writing, translation, and now technical aspects of VFX can be automated or assisted by AI, which may lead to reduced demand for certain skillsets. Tools such as Wonder Dynamics (2023) automate character animation, prompting fears of obsolescence among professionals. However, growing adoption of AI is expected to create new opportunities for workers with complementary skills and expertise, in areas like machine learning engineering and chatbot development, for example (Teutloff 2025). The challenge lies in furnishing the UK's screen sector workforce, including freelancers, with the training and resources needed to adapt and thrive alongside AI.

The sector demonstrates strong potential to harness AI's benefits. It boasts a culture of innovation, a proactive creative technology community, and institutions including the BBC and BFI who are actively experimenting with AI. However, bodies such as the House of Lords Communications and Digital Committee (2024) have identified "barriers to UK advantage" in AI, including the need for more high-end computing facilities and equitable access to compute (including for small- and medium-size enterprises), as well as scaleup support that helps UK AI and creative technology startups "grow into global competitors" (2025b). The House of Commons Culture, Media and Sport Committee (2025) has also recommended government backing for initiatives including an "AI observatory" and "tech demonstrator hub" to bridge knowledge and training gaps and foster collaboration between creatives and technology experts.

Without strategic planning, the UK screen sector risks being outpaced by global competitors and new market entrants offering AI-generated content. While AI can democratise content creation and empower independent voices, its integration must be managed thoughtfully to ensure sustainable growth and protect the livelihoods of creative professionals.

3.1. Key risks: AI disruption may overtake opportunities

Generative AI is becoming integrated with creative tools, products and services. Experimental use cases are being developed. AI-first companies, AI-native content (Sun 2023), and AI-driven productions are in their nascency. The full impact of this technology cannot be known at this stage. However, our research indicates several areas where the valuable and creative UK screen sector could be threatened by rising disruption caused by AI.

The unlicenced training of generative models on screen content by AI technology companies represents the primary source of disruption facing the film, TV and video games industries. "We are at an unprecedented place in history where people have created tools without asking permissions for data," says one UK-based creative technologist. Creators recognise the threat this poses: Baroness Beeban Kidron, a British director turned politician who sits in the House of Lords, describes unauthorised training on UK creative works as an "assault on the British economy" and rejects the idea "that [creators] should have to build AI for free with our work, and then rent it back from those who stole it" (Milmo 2025).

Generative AI may disrupt the market for human-authored works, as suggested by a CISAC (2024) study that warns of a potential 21% reduction in earnings for audiovisual workers within three years. The technology has already disrupted several media sector business models. Licensing deals between news media and AI developers (see **Table 4**, page 26) are, in part, a reaction to AI-produced summaries that are "leaving publishers fearful of losing readers and ad revenue" due to a decline in direct internet traffic (H. Miller 2024). Stock image providers have also pivoted to offer AI-generated images alongside human-authored shots due to competition from Midjourney, DALL-E and other AI tools (O'Brien 2023).

New AI-first studios, such as UK-based Wonder, show the potential for generative AI to disrupt the standard filmmaking business model (Cendon Garcia 2025). These emerging companies are built to be "capital-light" and deploy AI tools to significantly reduce the time and cost of production – with cost savings linked to the reduced need for physical materials and human labour. "There are so many mechanical processes in film and animation production that are very well suited to being 'optimised' – a gross business word," says one screen creative. "But [AI] can lower production rates and probably be, maybe not as good, but perhaps good enough."

Academic studies find that generative AI is affecting demand for certain skill sets. An analysis of freelance work post-ChatGPT reports increased demand for skills that are "complementary" to LLMs, such as machine learning programming and chatbot development, but a 20-50% decrease in demand for "substitutable" skills such as writing and translation – the sorts of tasks LLMs can complete without expert input (Teutloff 2025). These findings demand considered discussion by the screen sector: it has a large freelance production workforce (Cade 2024), and the development of powerful multi-modal models extends the scope of what skills might be considered either complementary to, or substitutable by, AI.

Some technical VFX skills or tasks, for example, can now be handled by AI, as demonstrated by motion capture and character animation tool Wonder Dynamics (**wonderdynamics.com**), which automates the process of replacing human actors with computer-generated characters in live-action scenes. One VFX specialist expressed the concern that "tools like these … are going to really take over … to the point where we'll become obsolete. It's going to take some time, but I think they're the danger". The challenge facing the UK screen sector, therefore, is to develop greater understanding of the capabilities of generative AI, how these may evolve and become integrated into workflows, and to invest in training and upskilling for sector workers to ensure skillsets remain complementary to AI tools.

Failure to anticipate, plan for and adapt to generative AI will undermine the UK screen sector's ability to capitalise on the opportunities the technology provides. It has the potential to democratise content creation by lowering technical and financial barriers to entry, making it more feasible for new, independent creators to fully realise their visions. Wonder Dynamics co-founder, actor Tye Sheridan, sees AI automation as enabling filmmakers to "tell stories bigger than our pockets". He says he would "never put myself out of work" by creating a tool that would reduce opportunities for actors (Wonder Dynamics 2023). But the introduction of such tools will affect some workers, so AI adoption needs to be planned for and managed in a way that supports affected workers to retrain for new or emerging roles in the sector.

Lack of planning and adaptation also risks UK screen sector organisations being crowded out by new market entrants. Chinese TV manufacturer TCL, for example, has built a free streaming platform to serve AI-generated, ad-supported content to owners of their devices (Koebler 2024). Tools such as Showrunner, meanwhile, allow audiences to create their own versions of shows that look similar to existing IP (Welk 2024), and social media content creators are already using AI to produce fake trailers for real movies which generate hundreds of thousands of views on YouTube (Kanter 2025). These content offerings might not – yet – directly compete with the UK screen sector's premium output. But academic reviews of disruptive technologies find that these technologies typically move from the "low end of the market to the high end over time" as they rapidly "improve on the attributes demanded by the mainstream market" (Cozzolino 2018).

3.2. Harnessing potential and confronting barriers

Our research into the UK screen sector suggests areas of significant strengths as well as some limitations that will influence the sector's ability to grasp the potential opportunities of generative AI, mitigate threats and risks, and continue to drive growth in jobs and economic value (**Table 5**, page 40).

The strengths reflect a culture of innovation, openness to experimentation, and an ecosystem that has the potential to support creative and commercial exploration of generative AI. There is a clear appetite for responsible AI integration, underpinned by a collaborative spirit and a foundation of technological curiosity. "The creative industries – and especially visual effects – have always been defined by a mix of creative and technical people finding solutions to storytelling problems by embracing new technologies," says Graham Jack, UK-based chief technology officer of VFX house beloFX (Tabbara 2025).

The sector's limitations, meanwhile, are centred on uneven access to AI skills, resources, and infrastructure. These challenges are compounded by fragmented governance, funding constraints, and uncertainty around legal and technical standards, all of which hinder the sector's ability to scale and adapt at pace. Generative AI has "unprecedented transformative potential," says Jack, "and it's important that we have frameworks to support and encourage innovation, while also respecting the rights of IP owners."

An April 2025 report into British film and high-end television (HETV) by the House of Commons Culture, Media and Sport (CMS) Committee observed that UK producers and creatives are "keen to embrace the opportunities that AI offers" but need "guidance and help doing so". The committee urged the UK government to fund a proposal from the BFI to establish an "AI observatory" and "tech demonstrator hub" – the former "to bring together academics and researchers to share insights with the industry", and the latter "to help those in the film and HETV sectors understand what AI tools could mean for their work". The CMS recommendation broadly echoes other studies (Black 2024; Easton 2025) calling for networks and hubs of knowledge sharing and collaboration within the Creative Industries, recognising that such interventions capitalise on the sector's strengths and address its limitations.

Strengths	Limitations
• The UK screen sector has a history of adopting new technologies, with many generative AI use cases already identified. • Organisations including the BBC, BBFC, and BFI are actively experimenting with generative AI, demonstrating sector-wide curiosity and openness. • A strong creative technology community, including university spin-outs, contributes to AI knowledge generation and experimentation. • Some organisations (e.g., Blue Zoo, the BBC, Pact) have developed their own AI principles, and proposals for responsible AI use are evolving. • New AI-first companies and AI-enhanced products are emerging, indicating growing commercial interest and opportunities.	• AI skills shortages and limited R&D capacity among SMEs reduce the sector's ability to explore and innovate with AI. • Many screen sector workers, including freelancers, lack access to formal training or resources to learn about AI, and there is an absence of networks or hubs for local, regional and cross-sector knowledge sharing on AI. • No industry-wide standards or policies on AI use, and the UK copyright framework is under review, creating ambiguity. • Proprietary AI models can be expensive to develop, and the UK lacks its own foundation models. • Limited funding and growth capital restrict innovation and the scaling of UK creative technology startups. • Significant investment may be needed to integrate AI into legacy systems or overhaul backend infrastructure. Fast pace of AI development creates fear of "first mover disadvantage" and accumulating "technical debt".

Table 5. Summary of UK screen sector strengths and limitations relating to generative AI adoption.

Further reading

Introduction to Moments

The CoSTAR Foresight Lab's *Moments* report focuses on emerging areas of complexity in the Creative Industries. The disruptive potential of generative AI and advanced machine learning is one facet, and the report explores uncertainties around ownership of machine learning, its application, and the redefinition of creative practice. The report presents diverging future scenarios – ranging from grassroots-driven innovation through to "data alchemy" and "collective intelligence", "IP fracking" and "auto-pipeline" – each showing starkly different outcomes in terms of creative control, business models, and ethical implications.
costarnetwork.co.uk/resources/introduction-to-moments

4. Paths forward

Summary

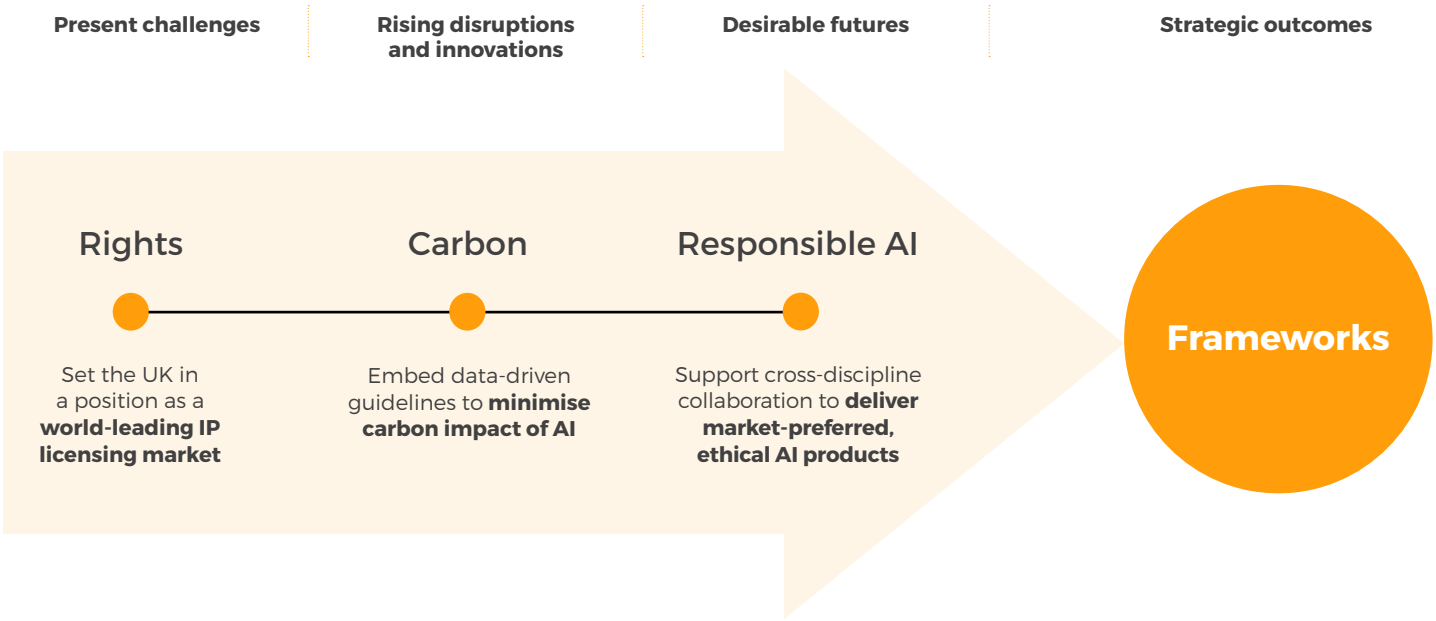
The UK screen sector has many potential paths forward over the next three critical years. Based on an analysis of the insights in this report, it is clear that in all of the most likely scenarios, the sector will have to navigate a number of key barriers and opportunities that are already present, or developing quickly. Using a strategic analysis, we present these barriers and opportunities as a nine-point strategic roadmap for the sector. To structure the roadmap, we present three key strategic outcomes that should be delivered over the next three years, and offer high-level recommendations to guide the sector towards these outcomes.

Our recommendations identify current challenges, including unresolved concerns over AI training on copyrighted material, and the need for world-class intelligence and insights to enable the sector to strategise, adapt and grow in the generative AI era. To address rising disruptions and innovations, the recommendations call for upskilling the screen sector workforce with AI-complementary skills, unlocking investments in the high-potential creative technology sector, and embedding data-driven guidelines to reduce AI's carbon impact. These steps are designed to ensure the UK remains competitive and innovative in the face of rapid technological change, but with a crucial focus on sustainability.

Finally, the vision for a desirable future includes empowering independent creators to harness AI in their work, thereby supporting a vibrant and diverse creative ecosystem. We also call for cross-disciplinary collaboration to ensure AI products are both market-preferred and ethically sound. We emphasise the importance of public understanding of the use of AI in screen content, aiming to build trust and transparency in its application.

The overarching goal is to align technological advancement with ethical responsibility and economic opportunity, ensuring long-term growth and success of the UK screen sector.

4.1. Frameworks



Recommendation 1

Rights: Set the UK in a position as a world-leading IP licensing market

There is an urgent need to address copyright concerns surrounding generative AI. The current training paradigm – where AI models are developed using copyrighted material without permission – poses a direct threat to the economic foundations of the UK screen sector. A viable path forward is through licensing frameworks: 79 licensing deals for AI training were signed globally between March 2023 and February 2025, the UK's Copyright Licensing Agency is developing a generative AI training licence to facilitate market-based solutions, and companies such as Human Native are enabling deals between rightsholders and AI developers. The UK is well-positioned to lead in this space, thanks to its "gold standard" copyright regime (Talfan Davies 2025b), a vibrant creative technology ecosystem, and a coalition of creative organisations advocating for fair licensing practices. For this market to be effective, new standards and technologies are required, as outlined in a May 2025 CoSTAR National Lab report (Bennett 2025). By formalising IP licensing for AI training and fostering partnerships between rightsholders and AI developers, the UK can protect creative value, incentivise innovation, and establish itself as a hub for ethical and commercially viable AI-supported content production.

Recommendation 2

Carbon: Embed data-driven guidelines to minimise carbon impact of AI

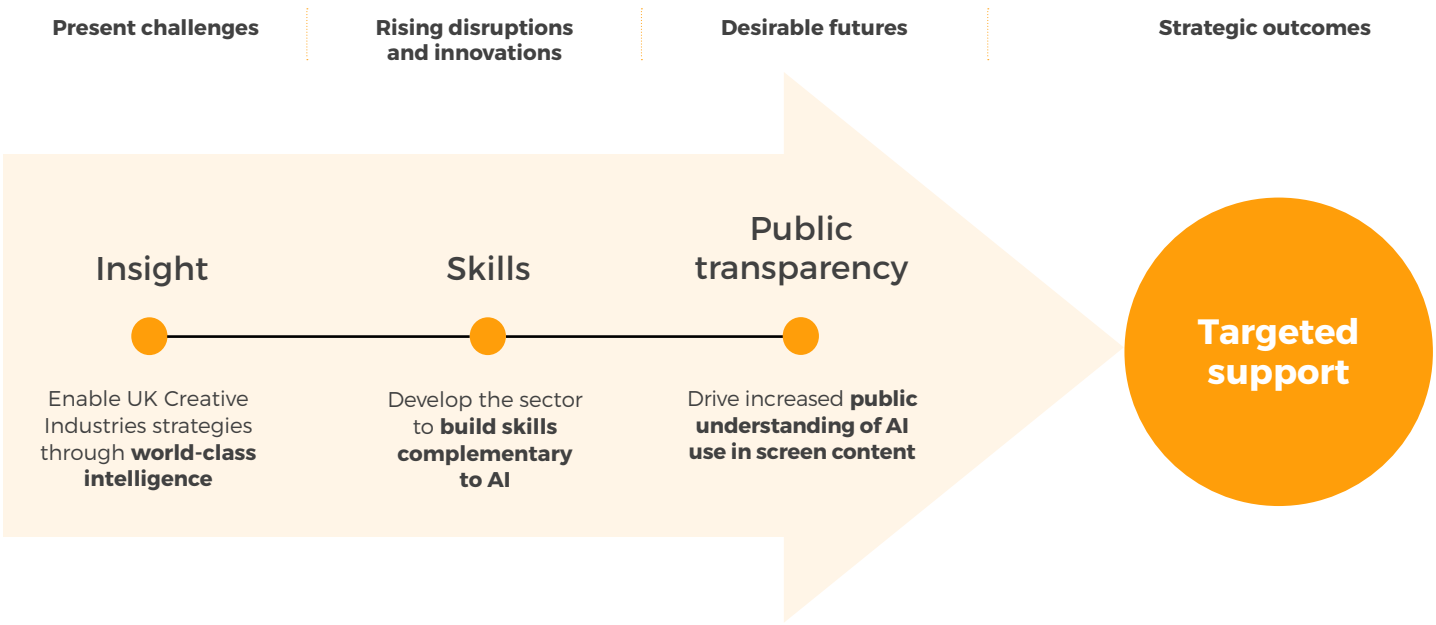
Generative AI models, particularly large-scale ones, demand significant computational resources, resulting in high energy consumption and associated carbon emissions. Yet the environmental footprint of AI is often obscured from end users in the Creative Industries. Transparency is, therefore, a critical first step to addressing AI's environmental impact. UK-based companies such as Blue Zoo are already choosing to run AI models on infrastructure where energy sources and consumption are fully visible. These practices, combined with calls for regulatory frameworks akin to appliance energy labels, demonstrate a need for sustainability-focused AI guidelines. With the screen sector in the vanguard of generative AI uses globally, it is ideally positioned to push the demand for carbon minimisation, and the UK screen sector should lead by example.

Recommendation 3

Responsible AI: Support cross-discipline collaboration to deliver market-preferred, ethical AI products

Generative AI must align both with industry needs and public values. Many models, tools and platforms have been developed without sufficient input from the screen sector (or, indeed, screen audiences), leading to functionality and outputs that are poorly suited to production workflows or that risk cultural homogenisation and ethical oversights. (Use of large language models trained predominantly on US data may marginalise local narratives, for example.) Academics have called for "inclusive" approaches to AI development, arguing that generative AI's full potential can only be reached if creative professionals participate in its development. The feasibility of cross-disciplinary collaboration is demonstrated by Genario – a screenwriting tool created in France by a scriptwriter and an AI engineer. Embedding collaborative, inclusive design processes can enhance the relevance of AI tools to creative tasks, as demonstrated by Microsoft's Muse experiment. These processes also ensure that AI models reflect ethical standards and cultural diversity. The UK should look to combine its strengths in AI and humanities research, and its reputation for merging technology and culture, to deliver responsible, ethical AI.

4.2. Targeted support



Recommendation 4

Insight: Enable UK Creative Industries strategies through world-class intelligence

The UK has over 13,000 creative technology companies (Easton 2025) and a strong foundation in both AI research and creative production. However, across the UK screen sector, organisations, teams and individuals – especially SMEs and freelancers – lack access to structured intelligence on AI trends, risks, and opportunities. This absence of shared infrastructure for horizon scanning, knowledge exchange, and alignment limits the sector's ability to respond cohesively to disruption. The BFI has proposed creating an "AI observatory" and "tech demonstrator hub" to address this urgent challenge, and the proposal has been endorsed by the House of Commons Culture, Media and Sport Committee as a way to centralise insights from academia, industry, and government, and provide hands-on sector experience of emerging tools and capabilities.

Recommendation 5

Skills: Develop the sector to build skills complementary to AI

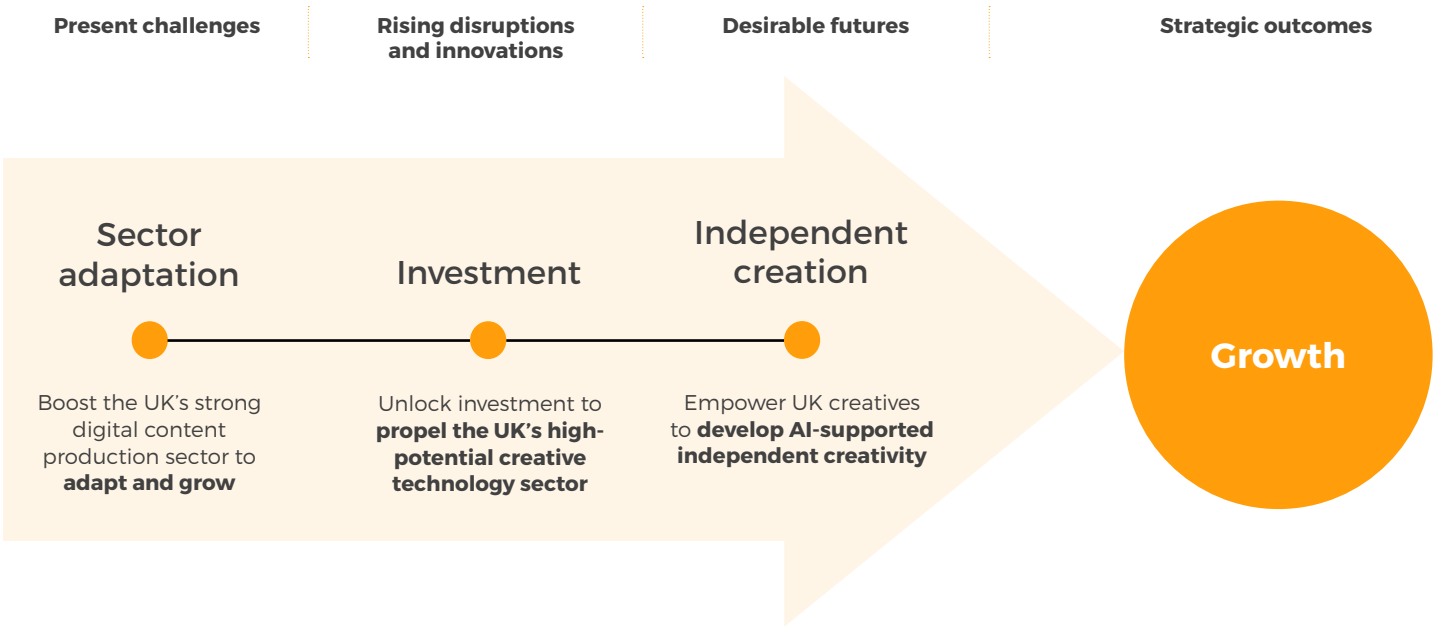
AI automation may, in time, lower demand for certain digital content creation skills. It may also create new opportunities for roles that require human oversight, creative direction, and technical fluency in AI systems. Our research identifies a critical shortfall in AI training provision: AI education in the UK screen sector is currently more "informal" than "formal", and many workers – particularly freelancers – lack access to resources that would support them to develop skills complementary to AI. However, the UK is well-positioned to deliver AI upskilling due to its strong base of AI research institutions, a globally respected creative workforce, and a blending of technology and storytelling expertise. By helping workers transition into AI-augmented roles, the UK can future-proof its creative workforce and maintain its competitive edge in the global screen economy.

Recommendation 6

Public transparency: Drive increased public understanding of AI use in screen content

Transparency will drive audience trust in the age of generative AI. Surveys reveal that 86% of British respondents support clear disclosures when AI is used in media production, and this demand for transparency is echoed by screen sector stakeholders, who call for standards on content provenance and authenticity to counter the rise of AI-generated misinformation and "slop". National institutions such as the BBC are already experimenting with fine-tuning AI models to reflect their editorial standards, and the BFI is deploying AI in archival work with a focus on ethical and transparent practices. These efforts demonstrate the UK's capacity to lead in setting audience-facing standards and educating the public about generative AI's new and developing role in content creation.

4.3. Growth



Recommendation 7

Sector adaptation: Boost the UK's strong digital content production sector to adapt and grow

The UK boasts a unique convergence of creative excellence and technological innovation, with a track record of integrating emerging technologies into film, TV, and video game production. London is the world's second largest hub (after Mumbai) for VFX professionals (Bell 2024). Generative AI is already being used across the UK screen sector to drive efficiencies, stimulate creativity, and open new storytelling possibilities – from AI-assisted animation (*Where the Robots Grow*) and visual dubbing (Flawless) to reactive stories and dialogue (*Dead Meat*). However, surveys identify a lack of AI training and funding opportunities, while parliamentary committees point to fragmented infrastructure and an absence of industry-wide standards that could hinder the continued growth and development of AI-supported creative innovation. Our own roundtable discussions with the sector highlighted the need for resources to better showcase the R&D work of the sector, to support collaboration and reaching new investors.

Recommendation 8

Investment: Unlock investment to propel the UK's high-potential creative technology sector

The UK is home to global creative technology leaders including Framestore and Disguise, as well as AI startups such as Synthesia and Stability. However, the House of Lords has identified a "technology scaleup problem" in the UK, with limited access to growth capital, poor infrastructure, and a culture of risk aversion acting as barriers to expansion. *The Coronation Challenge CreaTech Report* points to "significant" funding gaps at secondary rounds of investment (Series B+ stages) which are "often filled by international investors … creating risks of IP and talent migration out of the UK". The report also found that physical infrastructure is needed, stating that: "Those involved in CreaTech innovation can struggle to find space to demonstrate, and sell, their work." Commenting on a February 2025 House of Lords Communications and Digital Committee report into the scaleup challenge, inquiry chair Baroness Stowell called for action to "unravel the complex spaghetti of support schemes available for scaleups" and "simplify the help available and ensure it is set up to support our most innovative scaleups to grow".

Recommendation 9

Independent creation: Empower UK creatives to develop AI-supported independent creativity

Generative AI is lowering traditional barriers to entry in the UK screen sector, enabling individuals and small teams to realise ambitious creative visions without the need for large budgets or studio backing. UK-based director Tom Paton describes how AI breaks down barriers that have "kept so many creators on the sidelines", while the Charismatic consortium, backed by Channel 4 and Aardman Animations, sees the potential of AI "to support creators disadvantaged through lack of access to funds or the industry to compete with better funded organisations". The emergence of AI-first studios such as Wonder, which secured £2.2 million in pre-seed funding, further demonstrates the viability of independent, AI-supported content creation. By investing in accessible tools, training, and funding for independent creators, and developing market-preferred, ethical AI products, the UK can foster a more inclusive and dynamic creative economy where AI enhances, rather than replaces, human imagination.

Appendix

AI year in review, 2024

Researched and compiled by John Sandow

January-March

A report on the impact of generative AI on entertainment industry jobs revealed that 75% of respondents to a survey, co-commissioned by a range of bodies including the Animation Guild, indicated that "Gen AI tools, software, and/or models had supported the elimination, reduction, or consolidation of jobs in their business division" (CVL Economics 2024).

Meta responded to a class action lawsuit in California by admitting that it – like other developers – had used the Books3 dataset (which includes the text of over 195,000 books) to train its Llama LLMs but denied that their "use of copyrighted works to train Llama required consent, credit, or compensation" (Van der Sar 2024).

Nine new AI research hubs were announced for the UK, aiming to tackle complex problems including combatting cyber threats, supporting health treatments, and delivering faster development of electronic devices (UKRI 2024).

OpenAI unveiled Sora, a prompt-to-video AI model (it was released publicly in December 2024). The tool generates short video clips, up to 20 seconds in length, from either text or image/video inputs (Roth and Robison 2024).

Google introduced Gemini 1.5, saying that it can "perform highly-sophisticated understanding and reasoning tasks for different modalities" using, as an example, the model analysing a Buster Keaton film (Pichai 2024).

OpenAI told the House of Lords that "it would be impossible to train today's leading AI models without using copyrighted materials" (Communications and Digital Committee 2024).

The European Union passed the AI Act, a legal framework that classifies AI systems by risk level and imposes corresponding obligations, aiming to ensure safety and transparency, as well as actively prohibiting a range of AI systems deemed to have unacceptable risk (e.g., those being used for deceptive purposes; Future of Life Institute 2024).

The Labour Party (2024), who went on to win the UK's 2024 General Election, published its plan for the Creative Industries, including the objective to "Find the right balance between fostering innovation in AI while ensuring protection for creators and the ongoing viability of the creative industries".

The BBC piloted generative AI tools to support article writers around headline writing and article summarisation, although it abandoned plans to use similar tools for marketing the latest series of *Doctor Who* after complaints (CDO Magazine Bureau 2024; Graves 2024).

62% of studios surveyed for the 2024 Unity Gaming Report "said they used AI in their workflows, mainly to prototype quickly and for concepting, asset creation, and worldbuilding" (Unity 2024).

April-June

The New York Times claimed that Google and OpenAI transcribed YouTube videos to train their respective AI models (Metz 2024).

The AI Seoul Summit in May, building on work from the 2023 AI Safety Summit held at Bletchley Park, saw the UK further its international collaboration around AI concerns, including committing to work with other countries developing proposals to assess AI risks (Buckley 2024).

The Department for Science, Innovation and Technology announced the "Systemic AI safety fast grants" programme, which would see researchers collaborate with the UK AI Safety Institute to advance systemic approaches to AI safety (Department for Science, Innovation & Technology and AI Safety Institute 2024).

Tim Richards, CEO of cinema chain Vue, revealed that "AI is responsible for booking all of our screens" (Ntim 2024).

DNEG (2024), the UK/India visual effects company, secured a $200 million investment to "evolve from a pure services provider to a content production and AI-powered technology partner, providing the highest quality solutions across media, entertainment, and gaming", including the development of an "AI-powered, photo-real CGI editor".

Forbes accused Perplexity, an AI search startup, of infringing on its copyright and threatened legal action (Fischer 2024).

London's Prince Charles Cinema cancelled the private hire premiere of ChatGPT-scripted feature *The Last Screenwriter* after customer backlash, with it instead being released online (Dams 2024).

The BBC commissioned a report delving into audience views on generative AI, revealing that "many people already believe GenAI is the real deal", although "65% of UK adults agree products and services using AI make them nervous" (Archer 2024).

News Corp agreed a multi-year deal for OpenAI to train models on articles from News Corp publications including, from the UK, *The Sun* and *The Times* (Roth 2024b). This is one example of a raft of licensing deals that happened throughout the year, with the list of other companies licensing their content including Reddit, Stack Overflow, *Le Monde*, *Financial Times*, Informa, Vox Media, Wiley, Shutterstock, Getty Images, and many others (with some deals not being publicly disclosed; Schomer 2024b).

Anthropic (2024) released the Claude 3.5 Sonnet model, claiming to "raise the industry bar" and that its "models are subjected to rigorous testing and have been trained to reduce misuse", including allowing the UK Artificial Intelligence Safety Institute access to facilitate safety evaluations.

Meta paused plans in the UK to "use Facebook and Instagram user data to train generative AI" following concerns from the Information Commissioner's Office (ICO 2024). The plan was restarted in September after making "changes to its approach, including making it simpler for users to object".

July-September

The UK's Competition and Markets Authority (CMA) signed a joint statement with the European Commission and the US, setting out principles to protect competition and consumers, including the shared view that AI has the potential to spur innovation but this comes with risks to competition and consumers which could, if unchecked, become entrenched (Competition & Markets Authority 2024).

The Council of Europe Framework Convention on Artificial Intelligence was signed by the European Union, the UK, the USA and others. It aims "to ensure that activities within the lifecycle of artificial intelligence systems are fully consistent with human rights, democracy and the rule of law, while being conducive to technological progress and innovation" (Council of Europe 2024).

Two UK organisations (the AI Safety Institute, and the Centre for the Governance of AI), co-hosted a "conference in San Francisco for discussions with AI developers on how they can put into practice commitments made at the AI Seoul Summit" (AI Safety Institute 2024). The level of international co-operation on AI was later criticised by Ted Cruz, the lead member of the US Senate Commerce Committee, who subsequently "urged US officials to investigate whether European governments have tried to unduly influence the country's laws around artificial intelligence" (Coulter 2024).

The Creators' Rights Alliance, representing half a million UK creatives, penned an open letter addressed to leading AI companies calling on them to be transparent, offer fair remuneration, and respect creators' wishes (Scott 2024).

OpenAI launched o1, its most advanced model, but at a considerably higher cost-per-prompt than before (Bind AI 2024).

In a deal with film studio Lionsgate, Runway (2024) began training a new AI model on Lionsgate property, with the resulting model only being available to the studio.

The developer behind popular video game platform Roblox announced it was "building a generative AI model to allow creators to more easily build 3D objects and scenes" (Fried 2024).

A consortium led by Charismatic.ai and Channel 4, funded by the government's Innovate UK programme, planned "to create an [AI] prototype and publish new research into how AI could support under-represented content creators and established producers to enhance storytelling in film and television" (Bickerton 2024).

An open letter, entitled "Europe needs regulatory certainty on AI", was published and signed by representatives from companies including Meta, SAP and Spotify, calling for "a modern interpretation of GDPR provisions" so that Europe does not get left behind and left out (Lebrun 2024).

October-December

The UK government published the *Artificial Intelligence sector study 2023*, revealing that "there are more than 3,000 AI companies in the UK, generating more than £10 billion in revenues, [and] employing more than 60,000 people in AI related roles". Of these companies, 3% were identified as working specifically in the entertainment and media sector, but many companies work mainly in other sectors (e.g., information technology) that could overlap with media (Department for Science, Innovation & Technology 2024).

Invest 2035: the UK's modern industrial strategy, published by the government in November, highlighted emerging technologies, specifically AI, as one of the UK's "existing strengths", identifying a need to capitalise on this and the impact that AI will have on the economy (Department for Business & Trade 2024).

National Geographic documentary *Endurance*, which premiered at the BFI London Film Festival, used AI to recreate Ernest Shackleton's voice (Sancton 2024).

The latest iteration of Coca-Cola's iconic "Holidays Are Coming" advert was generated using AI (Carroll 2024).

HarperCollins followed its parent company News Corp in signing a licensing agreement allowing an AI developer – in this case, Microsoft – to use "select nonfiction backlist titles" in model training. Authors would need to opt-in and one author claimed to be offered $2,500 per book (Roth 2024a).

An AI video generator developed by Chinese company Minimax was observed creating videos with UK broadcaster logos, suggesting that the model's training data would have included their copyrighted media (M. Miller 2024).

An AI-training dataset "commonly used in the industry" (including by Apple, Anthropic, Meta and Nvidia) was found to have included text from illegally sourced subtitles of copyrighted films and TV shows (Reisner 2024).

UK public broadcasters the BBC, Channel 4 and ITN discussed how there was a high level of collaboration between them with regards to AI, with there also being a high level of involvement from the European Broadcasting Union (Curtis 2024).

Meta released its Llama 3.3 70B model, said to operate "at a significantly lower cost" compared to other models (Wiggers 2024).

The UK government went out for consultation on the subject of copyright and artificial intelligence. Their preferred option – requiring rightsholders to actively opt-out of allowing their work to be data mined – was met with backlash from within the Creative Industries (Milmo 2024).

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