REGLAB RADAR

Creative Futures

How Artificial Intelligence is reshaping the creative industry in Brazil

1st Edition - 2025

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Creative Futures: How Artificial Intelligence is reshaping the creative industry in Brazil

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The first edition of the **Creative Futures** study examines how generative artificial intelligence (GAI) is transforming Brazil's creative economy, analyzing its effects on use cases, revenue, employment, and sectoral perceptions. The report combines a systematic review of secondary data, such as quantitative surveys, market analyses, and opinion panels, to identify economic and sociocultural patterns, articulating empirical evidence with regulatory debates on innovation, authorship, and creative labor.

Key findings include:

- **AI-enabled creation is no longer an exception** and has become part of the daily workflow of Brazil's creative economy. AI use is widespread and permeates different stages of the production chain, with some areas standing out (digital creation, fashion, and games) and others showing steady but slower adoption (traditional audiovisual and the publishing industry).
- **Creative sectors have shown uninterrupted growth over the past five years.** There is no evidence that AI has reduced overall sector revenues, and most future projections indicate that AI is likely to accelerate this growth trajectory.
- **There is no evidence of mass job losses attributable to AI in the creative industry**, but there are significant indications of the revaluation of roles and professions. This dynamic reflects the predominantly augmentative—rather than automating—use of AI in the sector, while also creating professional upskilling challenges that must be addressed.
- **Perceptions among professionals in areas with lower levels of technological absorption contrast with macro-level data.** This may suggest (i) that some creators feel sector-wide gains are not evenly reflected at the individual level, and (ii) that barriers related to AI digital literacy need to be overcome.

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introduction

Brazil's creative industry is experiencing one of the most promising moments in its history.

In 2023, Brazil's creative industry generated BRL 393.3 billion, equivalent to 3.6% of national GDP, and employed more than 1.26 million formal workers.

This growth has unfolded alongside an unprecedented wave of technological transformation.

The rapid advancement of generative artificial intelligence (GAI), which gained momentum from 2022 onward, has become part of the everyday reality of creators, companies, and cultural institutions. These technologies are reshaping how ideas are produced, distributed, and consumed. Across sectors such as design, fashion, audiovisual, advertising, and music, GAI tools are increasingly integrated into processes of creation, editing, and content circulation. While they expand productivity, they also raise new ethical, economic, and cultural questions.

The *Creative Futures report* is grounded in this context of expansion coupled with uncertainty. Its goal is to **investigate how the adoption of generative artificial intelligence is transforming production processes, circulation dynamics, and value creation within Brazil's creative industry**, drawing on national and international empirical evidence to inform and qualify the debate on the sector's future.

The report seeks to measure impacts and to understand how human creativity is being reconfigured in the face of a new technological landscape, as well as **which pathways are emerging for a sector that combines culture, ideas, and the economy as drivers of development.**

Sources: Mapeamento da Indústria Criativa no Brasil (Firjan, 2025); O futuro da economia criativa: área vai criar um milhão de vagas até 2030 no Brasil (CNI, 2023). Mapping of the Creative Industry in Brazil (Firjan, 2025); The Future of the Creative Economy: The Sector Is Expected to Create One Million Jobs by 2030 in Brazil (CNI, 2023).

sample data

what is the creative industry ?

The creative industry is a sector that transforms ideas into economic, social, and cultural value, encompassing activities grounded in creativity and intellectual knowledge.

Beyond generating products and services, it drives economic and social development, strengthens cultural identity, and expands Brazil's soft power globally.

Creative professionals are at the forefront of experimentation and the application of new technologies, business models, and production formats. They act as agents of change, capable of anticipating trends and generating value for both companies and society.

The creative industry emcompasses áreas such as:

Consumer: advertising, marketing, architecture, design and fashion;

Culture: music, performing arts, cultural expressions;

Media: publishing and audiovisual;

Technology: information and communication technology (ICT), biotechnology, and research and development (R&D).

Given the broad scope of the creative industry, this research focused on the ten subsectors with the highest levels of formal employment in Brazil[1]:

- **ADVERTISING AND MARKETING;**
- **R&D;**
- **ICT;**
- **ARCHITECTURE;**
- **DESIGN;**
- **PUBLISHING;**
- **BIOTECHNOLOGY;**
- **CULTURAL EXPRESSIONS;**
- **AUDIOVISUAL;**
- **FASHION.**

Source: 1. Mapeamento da Indústria Criativa no Brasil (Firjan, 2025). Mapping of the Creative Industry in Brazil (Firjan, 2025);

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the importance of AI in these sectors

AI, particularly generative AI, has increasingly consolidated its role as a **transformative force within the creative industry**, with rapid adoption among sector professionals.

AI is primarily used as a tool for support and capability enhancement, automating repetitive tasks and enabling creators to devote more time to activities with higher artistic and strategic value. At the same time, ethical and cultural debates have emerged around issues of authenticity, authorship, and trust, alongside perceptions regarding the potential substitution of human roles, reflecting the complexity of creative work in an increasingly digital ecosystem.

Influencers and content creators use AI to edit content and generate images and videos, while writers rely on AI for grammatical revision and brainstorming. In music and audiovisual production, GAI has been applied to editing and automated translation, potentially expanding the global reach of creative works and cultural experiences.

In marketing, the use of data-driven models and campaign automation accelerates processes and supports message personalization. In design and architecture, AI has been incorporated to support prototyping and the generation of visual references.

These transformations require continuous training and professional adaptation in order to realize the positive potential of the technology, as proficiency in AI tools is becoming an essential competency in contemporary creative work.

Sources: The Sky is Rising (The Copia Institute & CCIA, 2024); The Ipsos AI Monitor (Ipsos, 2025); The economic potential of generative AI (McKinsey&Company, 2023); A Realidade do Marketing no Brasil (HubSpot, 2025); A.I. and Creators: The Future of Tech and Creativity (Youtube; Radius, 2025); The Effects of Generative AI on Productivity, Innovation and Entrepreneurship (OECD, 2025); Jobs of Tomorrow: Large Language Models and Jobs (World Economic Forum, 2023).

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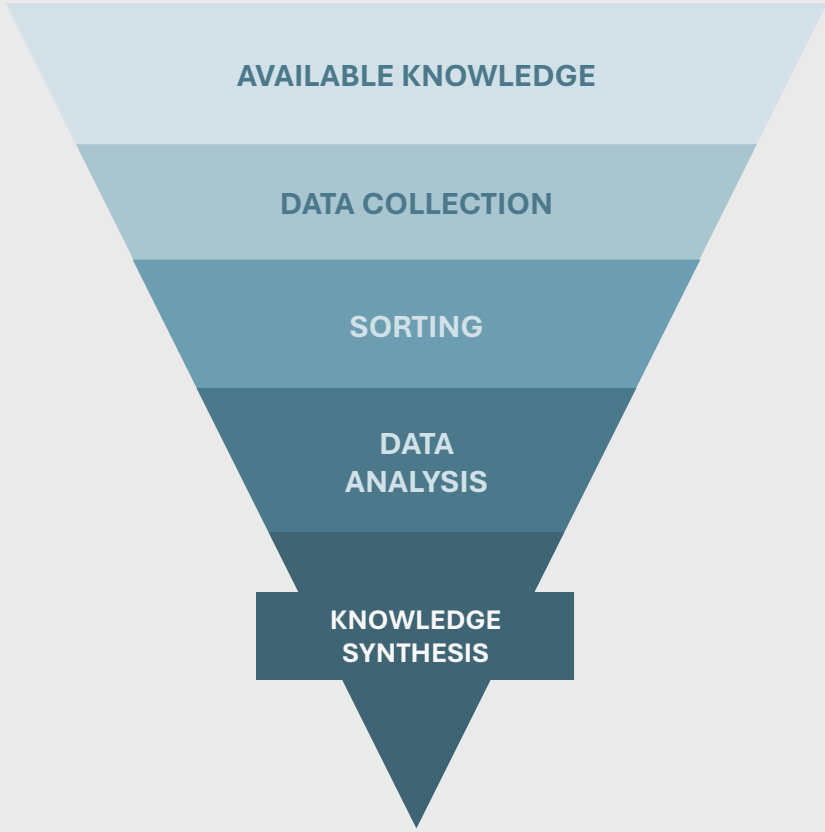
methodology: knowledge synthesis

A knowledge synthesis is a **systematic process of collecting, analyzing, and integrating existing research and evidence on a specific topic.** Its purpose is to identify findings, reveal patterns, highlight gaps, and generate conclusions or recommendations based on a rigorous review of multiple studies, commonly referred to as a **literature review.**

To ensure transparency and reproducibility, **this study adopted a systematic review approach. This method relies on a rigorous, transparent, and pre-defined protocol designed to minimize bias**. The process involves a comprehensive and reproducible search strategy to identify all relevant studies, independent screening by multiple reviewers, and quality assessment of the included studies.

In addition, Reglab pursued new references and methodological innovations for this research. Given a field marked by competing narratives and the difficulty of ensuring full coverage of all relevant studies, particularly due to the breadth of the topic, the study adapted a bias-reduction approach commonly used in the hard sciences: **the red team / blue team method.**



Sources: ANDERSON, C.; REYNOLDS, Travis. **Conducting a Literature Review**. Washington, DC: University of Washington (Evans School of Public Policy and Governance), 2020. FERRIS, T.; CAMELIA, F; MATTSSON, T; MACHADO, R. Red-teaming as a research validation method for systems engineering thesis students. INCOSE International Symposium, v. 32, n. 1, p. 529-544, 2022. Disponível em: https://doi.org/10.1002/iis2.12947. TORRACO, Richard J. Writing Integrative Literature Reviews: Guidelines and Examples. **Human Resource Development Review,** v. 4, n. 3, p. 356–367, 2005.

sample data

the blue/red team approach

This methodology was designed to **test opposing interpretations** observed in the use of GAI within the creative industry, with the objective of **reducing bias in the selection and assessment of evidence**. To this end, the research team was divided into two groups:

Blue Team	Red Team
Focused on **identifying evidence of positive impacts of GAI on the sector,** such as economic growth, job creation, market diversification, and the expansion of audiences for creative content.	Focused on **identifying evidence of negative impacts of GAI on the sector**, including job displacement, reduced remuneration, the precarization of creative roles, and risks to the authenticity of creative work.

Following data collection and screening, the review resulted in **51 documents, including institutional reports, peer-reviewed academic articles, public policy documents, and market studies**. The analysis considered public and empirical sources, with a geographic scope encompassing global, national, Latin American, and upper-middle-income country research, covering a **three-year period from August 2022 to August 2025.**

The complete methodology is presented in the Methodology Annex to this report

In addition, we encourage other organizations and researchers to contribute to ongoing data collection—either by incorporating new studies or by addressing areas not identified in this review—so that periodic updates of this report can be published.

sample data

key results

Based on the data collected, it was possible to assemble an exploratory overview of how generative artificial intelligence is being incorporated into the creative industry. The findings were organized around four analytical axes:

1. Uses

applications of generative AI across tasks and workflows within the creative industry.

2. Revenue

estimates and evidence regarding the potential economic impact and value added across creative sectors.

3. Employment

Transformations in roles, functions, and professional profiles.

4. Perceptions

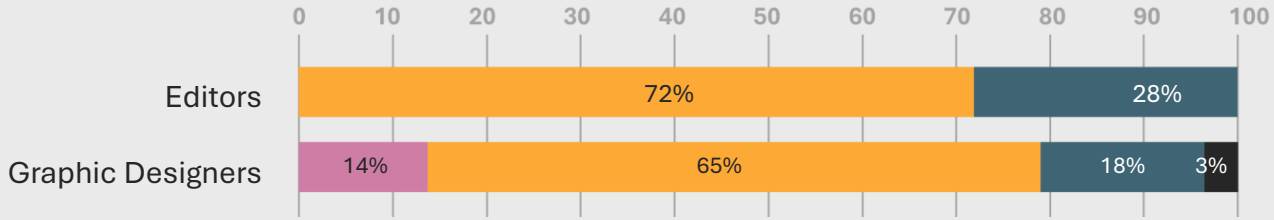
Views of creative industry professionals on the risks, opportunities, and broader implications of AI.

overall, there is greater use of AI to augment existing activities than to automate them

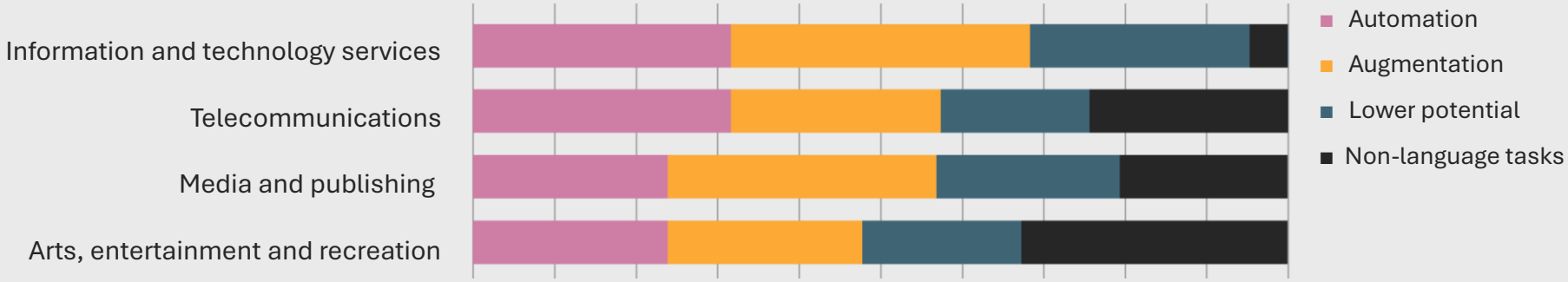
Creative sectors demonstrate a **higher capacity for augmentation -** where AI enhances productivity - than for automation, which involves the substitution of tasks by automated systems. This dynamic may suggest greater net gains for the sector, including increased productivity and the emergence of new roles.

However, this potential is contingent on institutional conditions, infrastructure, and access to technologies, and is closely linked to factors such as technical training, connectivity, innovation policies, and the distribution of economic benefits.

JOBS WITH THE HIGHEST POTENTIAL FOR AUGMENTATION



INDUSTRIES WITH THE HIGHEST EXPOSURE (AUTOMATION AND AUGMENTATION)



Source: Adapted from Jobs of Tomorrow: Large Language Models and Jobs (World Economic Forum, 2023, p. 11 and 15).

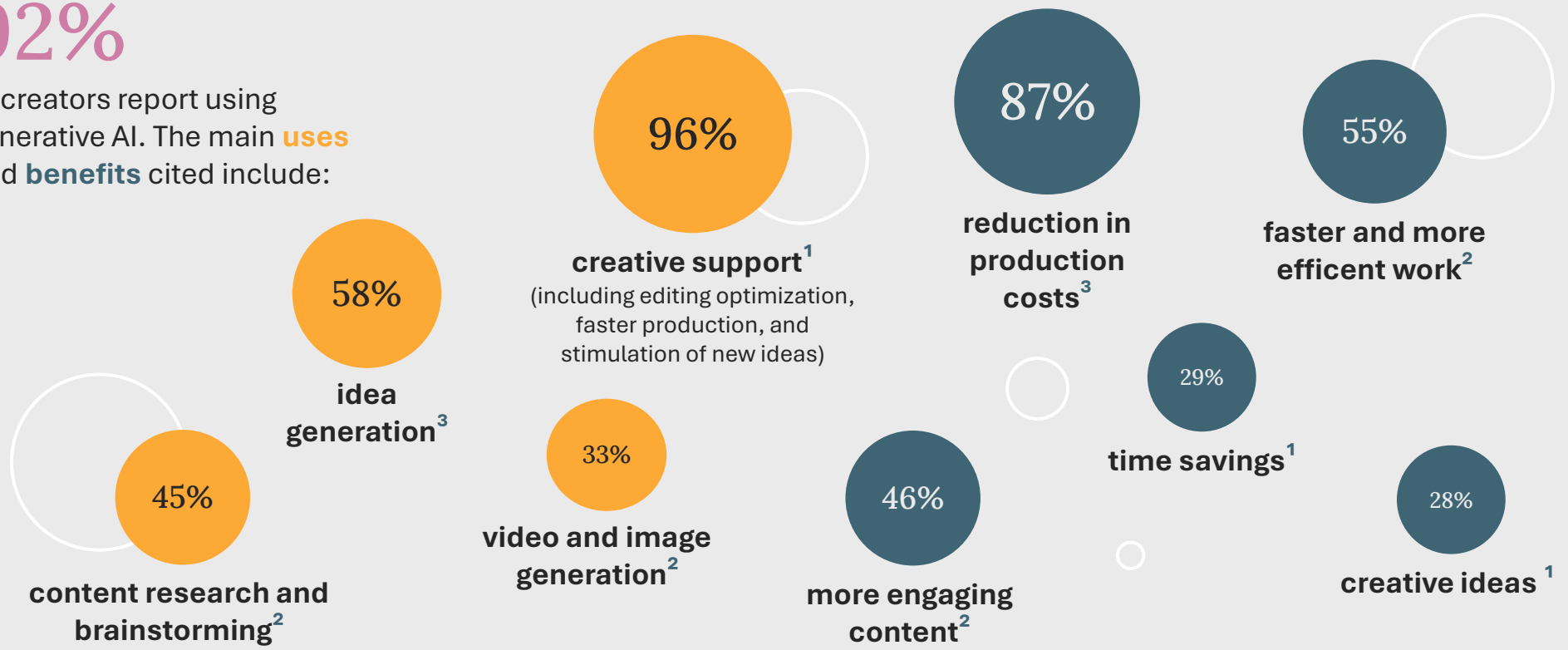
uses

digital creators are likely to benefit significantly from these uses

Generative AI has increasingly consolidated its role as a strategic ally for content creators and digital influencers, enhancing productivity, creative diversity, and opening new monetization opportunities.

92%

of creators report using generative AI. The main **uses** and **benefits** cited include:



uses

Sources: 1. A.I. and Creators: The Future of Tech and Creativity (YouTube; Radius, 2024); 2. Creator Economy 2024: Insights, Achievements, and the Road Ahead (Schwarzwald Capital, 2025); 3. AI in Influencer Marketing: 2023 Study (SocialPubli, 2023); The Socioeconomic Impact of Digital Businesses in the Creator Economy in Brazil (FGV ECMI; Hotmart, 2024).

audiovisual: film and music show different uses of AI, with expanding adoption

The use of generative AI in the audiovisual sector combines **creative diversity with ethical concerns**. While **challenges related to authorship, voice rights, cultural identity, and transparency in model training data** continue to emerge, the evidence also points to a scenario of **growing cooperation between technology and creativity**. Key uses include:

Technical and operational use:
AI tools are applied to the editing, mixing, and finalization of works, optimizing processes and reducing costs. The automation of repetitive tasks enables greater efficiency and supports independent production[1].

Creative cooperation:
Record labels and artists use AI to expand artistic possibilities and recreate fan experiences. Cases such as the recreation of Brenda Lee's voice (interpreter of the classic *Rockin' Around the Christmas Tree*, in a Spanish-language version) and the restoration of recordings by The Beatles illustrate how AI is redefining artistic creation[2].

Engagement and personalization:
AI enhances personalization and expands the global reach of content, including films and music, enabling richer entertainment options and creating more immersive experiences[3].

Sources: 1. Inteligência Artificial e Cultura: perspectivas para a diversidade cultural na era digital (Cetic.br, 2022, p.131); 2. Global Music Report 2025, (IFPI, 2025); 3. The IPSOS AI Monitor 2025 (Ipsos, 2025); Global Music Revenues Are Forecast to Double to $200 Billion in 2035 (Goldman Sachs, 2025); Efectos de la Inteligencia Artificial en Derechos Laborales y Creativos en la Industria Audiovisual (2020 a 2024) (Ortiz, 2025).

marketing and advertising: high technological absorption and a positive professional outlook

The advertising sector has emerged as one of the most dynamic in the adoption of artificial intelligence, with marketing professionals among the most frequent users of generative AI[1]. Studies point to gains in productivity and operational efficiency, while other analyses also highlight the need for caution regarding risks of creative homogenization and the potential erosion of critical judgment.

HOW IS AI BEING USED IN ADVERTISING?	
Campaign personalization and optimization	AI enables messages and formats to be tailored to consumer behavior, allowing for more individualized communication and greater potential for audience loyalty[2].
Process automation	AI tools already streamline operational tasks such as text generation, ad creation, and reporting, freeing up time for more strategic activities.
Predictive analytics and segmentation	AI processes large volumes of data and identifies consumption patterns, making marketing practices more analytical and data-driven.

61% of Brazilian marketing professionals see AI working alongside their teams to accelerate results[3].

71% of respondents in digital advertising believe that the benefits of artificial intelligence outweigh its drawbacks[4]

27% identify the learning curve as a barrier to AI adoption in marketing, a relatively low figure compared to other professions[3]

Sources: 1. IBM Global AI Adoption Index – Enterprise Report (IBM; Morning Consult, 2023, p. 38); 2. The economic potential of generative AI (McKinsey&Company, 2023); 3. A Realidade do Marketing no Brasil 2025 (Hubspot; Canva; Hypeauditor, 2025); 4. Decodificando os desafios da IA no mercado de publicidade Digital (IAB Brasil; Nielsen, 2025); Marketing Digital: contribuições da Inteligência Artificial na Criação de Conteúdo Estratégico Personalizado (Kanezaki; Oliveira; Canella, 2024);

in the visual arts, augmentation significantly outweighs automation, enabling new forms of expression

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The visual arts encompass a wide range of applications of generative AI. Due to their market characteristics, this is one of the creative subsectors most exposed to augmentation, rather than automation[1].

USES AND TRENDS – VISUAL ARTS	
Image creation	Designers use text-to-image generation models to test ideas and visual compositions. AI-generated works often achieve higher engagement rates and are more frequently favorited. [2]
Digital exhibitions	AI is used to create digital galleries and immersive exhibitions with global accessibility, expanding access to art and connecting artists and audiences within virtual environments.[3]
Architecture	Algorithms support architects in testing forms, predicting lighting conditions, and optimizing structures.[3]
Craftsmanship	AI assists in the production and design of handcrafted pieces, automating repetitive tasks and enabling professionals to shift toward roles focused on creation, maintenance, and programming[3]
Digital Art	African artists employ AI in multimedia installations and digital portraits, combining algorithms with traditional painting techniques to explore identity and cultural representation [3]

uses

Sources: 1. Barômetro de empregos de inteligência artificial 2025 (PwC, 2025, p. 25) 2. The effects of generative AI on productivity, innovation and entrepreneurship (OECD, 2025, p. 21); 3. Creative Economy Outlook, (UNCTAD, 2024);

in journalism and the publishing market, use is more diversified and adoption is progressing at a slower pace

Generative AI has been incorporated in multiple ways into journalism and the publishing sector, enhancing activities related to analysis, curation, and content production[3]. The publishing field is among those most exposed to augmentation activities, rather than automation[4].

Data analysis: GAI tools are used to map narratives and detect and analyze sentiment on social media, supporting investigative journalism and the analysis of online behavior[1].

Content automation and personalization: newsrooms integrate AI into processes of personalization, automation, and news summarization, increasing productive efficiency and diversifying formats[2].

Support for production and editing: AI tools assist journalists with transcription, research, and the creation of headlines and summaries[2].

Human oversight: The application of AI requires contextual understanding and editorial supervision to avoid bias and ensure analytical accuracy. Journalists remain essential for interpreting results and guiding complex investigations[1].

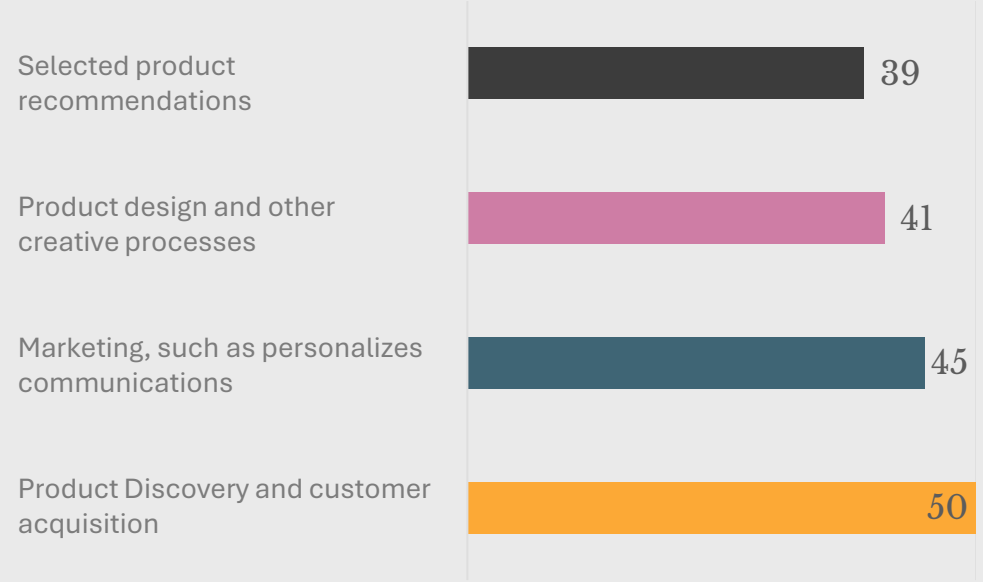
Sources: 1. O potencial da Inteligência Artificial Generativa no Jornalismo: Novas perspectivas para análise de dados nas plataformas de mídias sociais (Paulino; Cabral, 2025); 2. Reuters Institute Digital News Report 2025 (Reuters Institute; University of Oxford, 2025); 3. Artificial Intelligence (AI) in Brazilian Digital Journalism: Historical Context and Innovative Processes (Pinto; Barbosa, 2024); 4. Jobs of Tomorrow: Large Language Models and Jobs (World Economic Forum, 2023.

in fashion, there is a high level of experimentation with AI uses and applications

The fashion industry has demonstrated multiple forms of GAI use, spanning both creative and operational processes.

	EXAMPLES OF USES
Creative Processes	AI converts sketches into detailed designs, generates product variations, and accelerates the development of collections.
Marketing	AI generates personalized content and identifies trends in consumer behavior and consumption patterns.
Personalization	AI enables virtual fitting rooms, personalized recommendations, and interactive shopping experiences.
Operational efficiency	AI is used to optimize inventory management and logistics operations, reducing costs and shortening time to market.
Consumer perceptions in luxury fashion	in experimental settings, consumers have shown a preference for AI-generated designs, with preference levels increasing when the origin of the design was not disclosed.

Generative AI use cases with the highest potential in 2025, according to fashion executives (%)



Adapted from The State of Fashion 2024 (McKinsey&Company; The Business of Fashion, 2025, p. 42).

Sources: The effects of generative AI on productivity, innovation and entrepreneurship (OECD, 2025, p. 21); Generative AI: Unlocking the future of fashion (McKinsey&Company, 2023); The State of Fashion 2024 (McKinsey&Company; The Business of Fashion, 2025).

uses

in the games industry, AI is being integrated across multiple stages of production

The adoption of AI in the games sector has proven strategic across different stages of the creative process, from design to player experience. The main uses and applications include:

	MAIN USES AND APPLICATIONS:
Personalization and adaptive learning	The Egyptian company Warrd develops AI-based educational games capable of automatically adjusting difficulty levels according to each student's performance. The platform has already reached more than 30,000 students in countries such as Egypt, France, Nigeria, and Senegal.
Automation of creative workflows	Iota Kreatif Media , an Indonesian studio specializing in games and digital entertainment, uses AI to optimize creative design workflows.
Dynamic experiences and interactive narratives	AI is increasingly used to automatically generate levels, environments, and game rules, as well as storylines that adapt to player choices, enabling more personalized and immersive gaming experiences.

Source: Creative Economy Outlook 2024 (UNCTAD, 2024, pp. 57-58)

however, there are challenges and obstacles to implementing these uses in an efficient and inclusive manner

Evidence and professional perceptions also point to significant **challenges in the implementation** of GAI within the creative industry. These **challenges include preparing the workforce for the effective use of GAI and addressing inequalities in access to digital resources**.

SKILLS GAPS[1]
may hinder the efficient adoption of generative AI

INEQUALITY IN ACCESS[1]
to digital tools and education limits the complementarity between human tasks and generative AI

TEAM TRAINING AS AN IMPLEMENTATION BARRIER[2]
marketing professionals frequently identify workforce upskilling as a key obstacle to more strategic AI integration

CONCERNS ABOUT INACCURACIES AND BIAS[3]
lead to caution among leadership and reduce trust in AI-generated outputs

INSUFFICIENT QUALITY OF TRAINING DATA [3]
is identified as a critical factor undermining the performance and reliability of AI systems

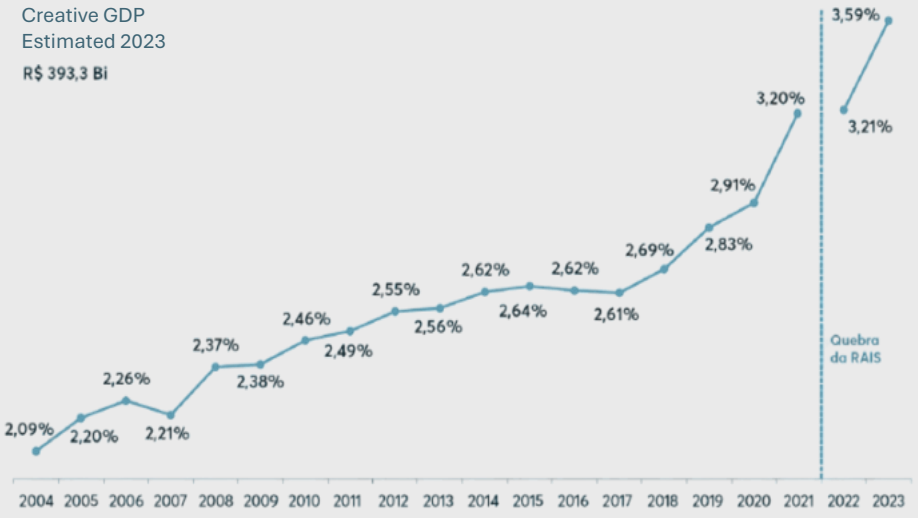
the productivity gains and augmentation enabled by GAI will only be sustainable if institutional, educational, and technological conditions are strengthened. Without this supporting infrastructure, the benefits are likely to concentrate among a limited number of actors, reinforcing existing asymmetries rather than promoting inclusion and creative development[4].

Sources: 1. Buffer or Bottleneck? Employment Exposure to Generative AI and the Digital Divide in Latin America (Gmyrek, Winkler & Garganta, 2024); 2. A Realidade do Marketing no Brasil (Hubspot, Canva & HypeAuditor, 2025); 3. The State Of GenAI In Media And Entertainment (Forrester; AWS, 2024, p. 10); 4. Jobs of Tomorrow: Large Language Models and Jobs (World Economic Forum, 2023, p. 19)

creative sectors have shown uninterrupted growth over the past 5 years

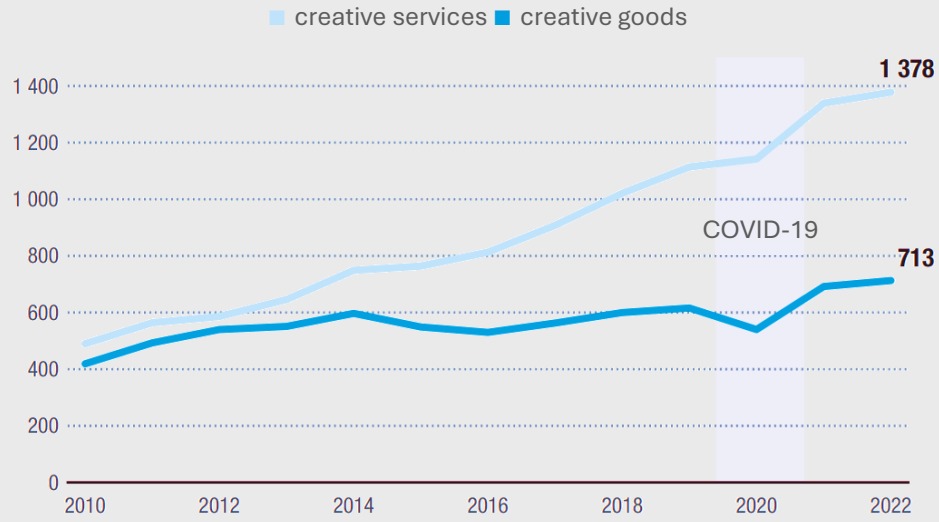
Both in Brazil and globally, **aggregate data on the creative industry indicate sustained growth, even in the post - COVID-19 period**. The economic and social transformations of the early 2020s had a direct impact on the creative industry, marked by accelerated digitalization and the expansion of social and sectoral policies that helped stimulate sectoral growth[1]. At least **for now, there is no evidence that generative artificial intelligence has negatively affected overall sector revenues.**

SHARE OF THE CREATIVE ECONOMY IN BRAZIL´S TOTAL GDP (2004-2023)



Mapeamento da Indústria Criativa no Brasil (Firjan, 2025, p. 16)

GLOBAL EXPORTS OF CREATIVE GOODS AND SERVICES (USD BILLION)



Adapted from Creative Economy Outlook 2024 (UNCTAD, 2024, p. 22).

Sources: 1. Mapeamento da Indústria Criativa no Brasil (Firjan, 2025); Creative Economy Outlook 2024 (UNCTAD, 2024).

total revenue in the media and entertainment industry may increase with the use of generative AI

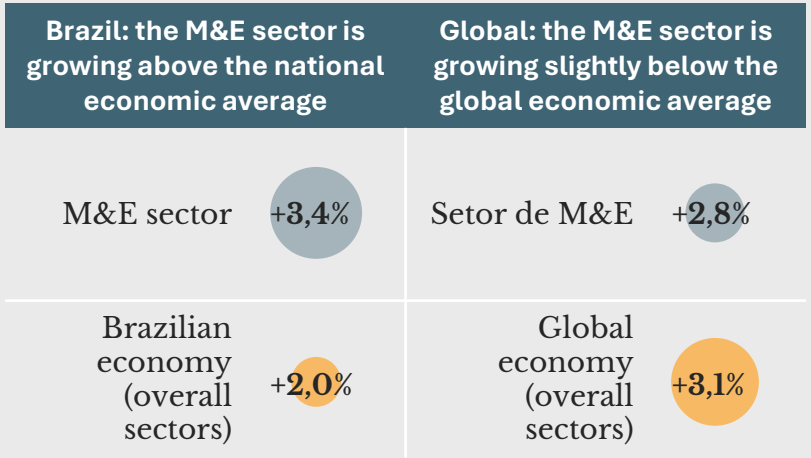
With the accelerated digitalization of content consumption, the media and entertainment (M&E) sector is expected to capture a significant share of the gains generated by generative artificial intelligence. PwC's **Global Entertainment & Media Outlook 2023–2027** projects sustained growth over a five-year horizon. In this context, generative AI emerges as a new driver of productivity and creative innovation, increasing the value added across the M&E sector.

GENERATIVE AI USE CASES WILL HAVE DIFFERENT IMPACTS ON BUSINESS FUNCTIONS ACROSS SECTORS [1]

	TOTAL, % OF INDUSTRY REVENUE
Administrative and professional services	0.9–1.4
Agriculture	0.6–1.0
High technology	4.8–9.3
Media and Entertainment	**1.8– 3.1**
Telecommunications	2.3–3.7

Generative AI could generate between USD 80 and130 billion per year, representing approximately **1.8% to 3.1% of global revenue**.

PROJECTED GROWTH OF M&E INDUSTRY THROUGH 2027 [2]



Source: 1. developed based on The economic potential of generative AI (Mckinsey, 2023, p. 25)
Source: 2. developed based on Pesquisa Global de Entretenimento e Mídia 2023-2027 (PwC, 2023, p. 5)

in some creative industry sectors, the economic impact of generative AI is significantly higher, particularly in fashion and digital creation

> In the **fashion, apparel, and luxury** sector, generative AI could add between USD 150 and 275 billion in operating profit over the next 3 to 5 years.

Projected growth is driven by the use of generative models in design processes, personalization, and supply chain management.

The potential gains in efficiency and creativity help explain the projected increase in value, particularly among companies that successfully integrate generative AI into sustainable and consumer-centered practices[1].

> The **digital creation sector** is also undergoing a period of expansion, estimated at **USD 300 billion in 2024, with the potential to double by 2030**,

This growth is driven by factors such as increased fan engagement, new monetization tools, and shifts in consumer behavior toward more personalized content.

Within this transformation, the role of artificial intelligence stands out, as it is redefining how creators produce, distribute, and monetize their content[2].

Sources: 1. Generative AI: Unlocking the future of fashion (McKinsey, 2023); 2. Creator Economy 2024: Insights, Achievements, and the Road Ahead (Schwarzwald Capital, 2024);

music and audiovisual sectors are expected to continue growing, but revenues may become more concentrated among companies, meaning gains are unlikely to be evenly distributed

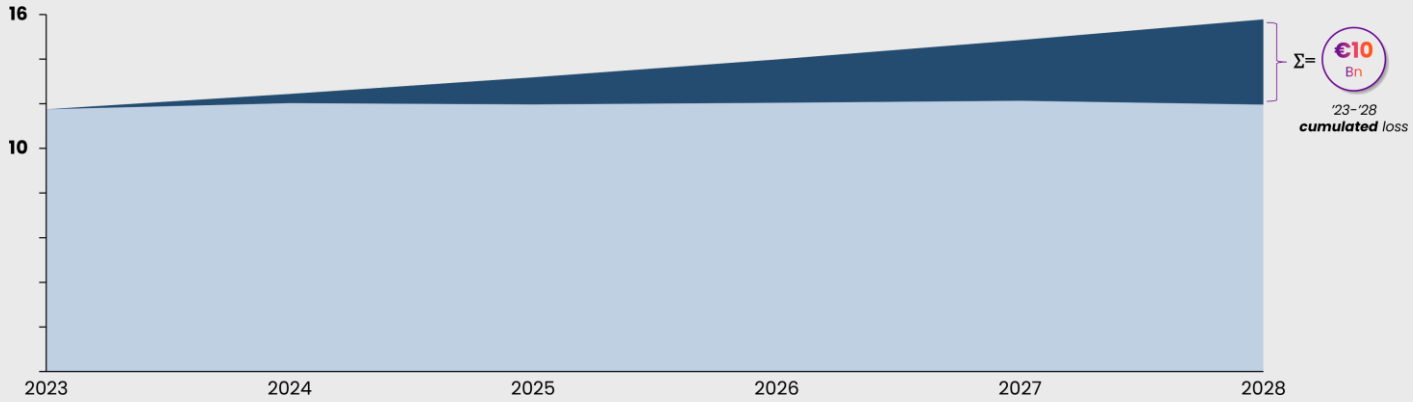
Revenues in the music sector driven by AI are expected to increase, supported by the expansion of prompt-to-output tools and AI-assisted creative software.

However, individual creators may experience revenue losses, potentially forfeiting up to 24% of their income in music and 21% in audiovisual by 2028.

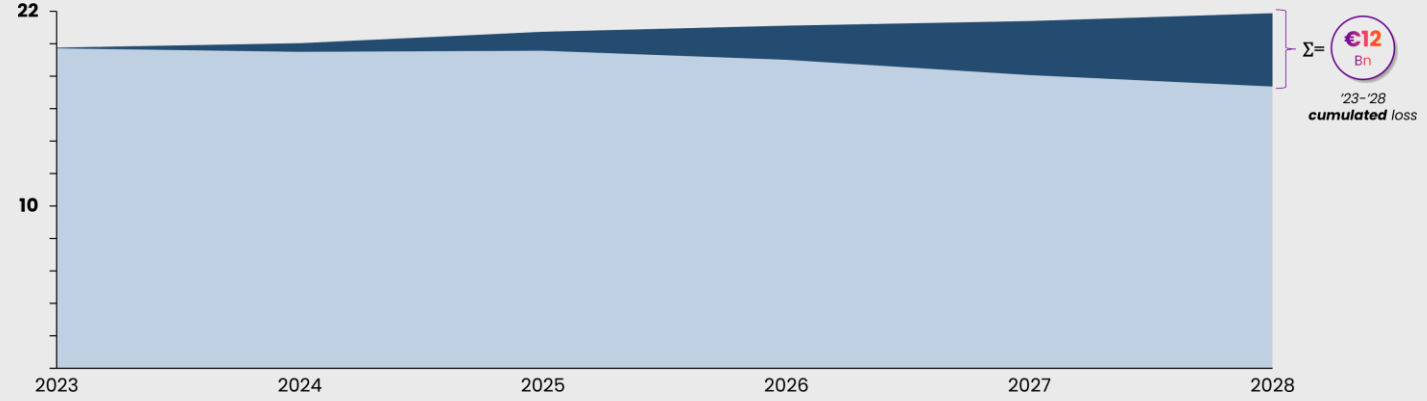
LEGEND

- Share of sector revenue that creators may lose due to AI adoption
- Share of sector revenue that may be captured by creators

REVENUES FOR MUSIC CREATORS WITH AND WITHOUT THE IMPACT OF GENERATIVE AI | € BILLIONS AND %, 2023 - 2028



REVENUES FOR AUDIOVISUAL CREATORS WITH AND WITHOUT THE IMPACT OF GENERATIVE AI | € BILLIONS AND %, 2023 -2028



Adapted from Study on the economic impact of Generative AI in the Music and Audiovisual industries (CISAC, 2024, p. 67, 83).

Sources: Study on the economic impact of Generative AI in the Music and Audiovisual industries (Cisac, 2024)

evidence and projections point both to the displacement of existing jobs and to the emergence of new occupations in the creative sector

On the one hand, there is a reduction in the supply of positions and in demand for roles involving mechanical or freelance tasks:

↓ Between eight months and one year after the launch of ChatGPT and AI tools for image generation, a **21% decline was observed in writing and programming job postings, and a 17% decline in 3D modeling and graphic design roles**[1]

↓ **A 2% decrease in freelance jobs was recorded on Upwork, with similar effects observed in the design field,** associated with the release of ChatGPT[2]

On the other hand, the sector **continues to show strong labor demand:**

↑ **389,000 creative industry job openings were posted on the Hotmart platform in 2024, representing a 30% increase compared to the previous year**[4]

↑ **Information and communication technology professionals are among those most exposed to AI, yet they continue to experience positive levels of labor demand**[5]

Creative freelancers have increasingly faced substitution by AI in roles such as video editing, content authorship, and graphic design[3]

The graphic design sector shows a high potential for complementarity with AI use, estimated at around 75%, indicating significant opportunities for augmented work rather than substitution[6].

Sources: 1. Who Is AI Replacing? The Impact of Generative AI on Online Freelancing Platforms (Demirci, Hannane & Zhu, 2023), 2. The Short-Term Effects of Generative Artificial Intelligence on Employment: Evidence from an Online Labor Market (Hui, Reshef & Zhou, 2023), 3. Artificial intelligence and technological unemployment (Nigar et al. 2025); 4. The Socioeconomic Impact of Digital Businesses in the Brazilian Creator Economy (FGV ECMI & Hotmart, 2024), 5. Barômetro de Empregos de Inteligência Artificial 2025 (PwC Brasil, 2025), 6. Jobs of Tomorrow: Large Language Models and Jobs (World Economic Forum & Accenture, 2023)

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new occupations may also be driven by large language models and generative artificial intelligence

According to the *Jobs of Tomorrow study*[1], the expansion of large language models and generative AI has fostered new forms of human–AI collaboration, **giving rise to occupations that require creativity, technological proficiency, and critical thinking.** Among these emerging roles are:

AI-ENABLED CONTENT CREATORS

Professionals who use large language models (LLMs) to generate and enhance content across different fields. They have a strong command of AI model functionality, enabling the production of original and personalized content.

INTERFACE AND INTERACTION DESIGNERS

Professionals responsible for making AI systems accessible, intuitive, and creative. They work on the design of personalized assistants, immersive environments, and creative tools, ensuring usability, aesthetics, and inclusivity in human–AI interaction.

Sources: Jobs of Tomorrow: Large Language Models and Jobs (World Economic Forum, 2023, p. 13)

in Brazil, there is a strong outlook for job growth in the cultural sector, above the average of other sectors

By 2030, the **creative industry is expected to generate approximately one million new jobs** in Brazil, equivalent to one in every four jobs created during the period, reaching a total of 8.4 million employed workers[1].

↑ **13.5%** **projected growth of Brazil's creative industry** by 2030

↑ **4.2%** **projected growth of other sectors** of the Brazilian economy by 2030

This increase is part of a broader trend. In Brazil, jobs requiring AI-related skills grew by 30% in 2024, compared to a global average of 7.5%, even amid an 11% decline in total job postings worldwide[2]

Sources: 1. Observatório Nacional da Indústria (CNI, 2023), 2. Barômetro de Empregos de Inteligência Artificial 2025 (PwC Brasil, 2025)

AI-related skills have enabled wage increases for workers with these qualifications

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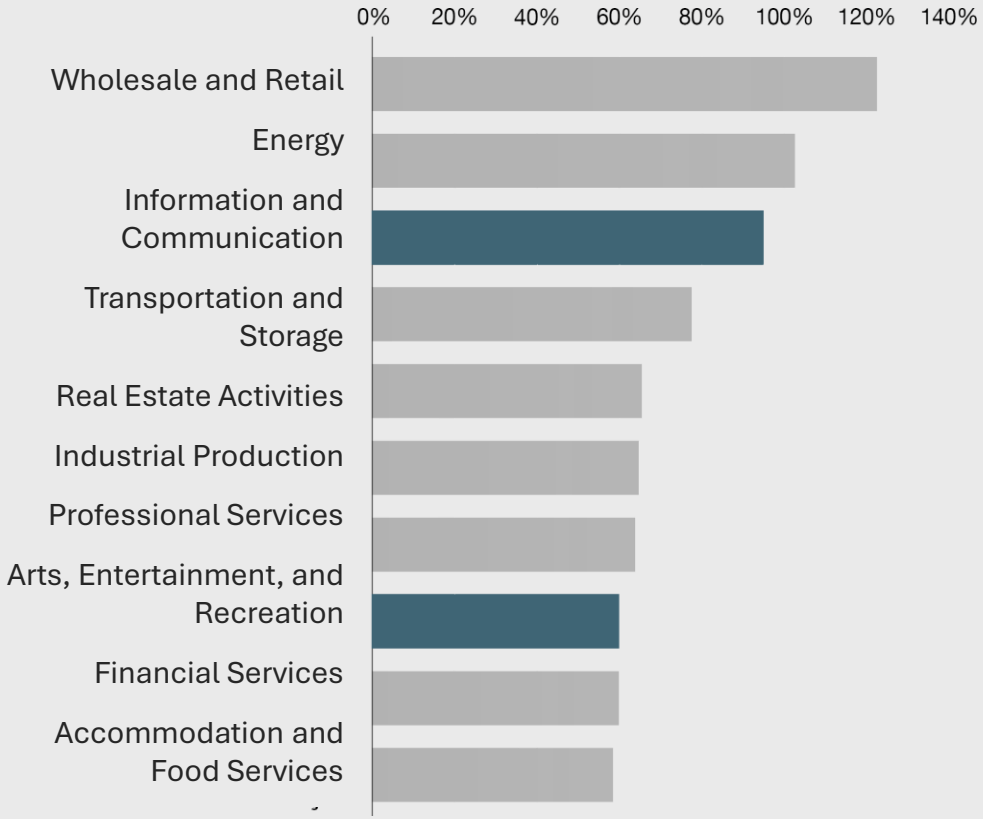
AVERAGE WAGE INCREASE FOR JOBS REQUIRING AI SKILLS IN 2024, BY SECTOR



Adapted from: Barômetro de Empregos de Inteligência Artificial 2025 (PwC Brasil, p. 18)

According to a PwC study, professionals with AI-related skills earn, on average, 56% higher wages. This gap is observed across all analyzed sectors, including arts, entertainment, recreation, and information and communication, indicating a broad trend toward the valorization of digital skills*.

**Higher wages also reflect the scarcity of these talents. However, rarity alone does not explain the increase: to justify higher pay, organizations must recognize the strategic value that these competencies represent.*

Source: Barômetro de Empregos de Inteligência Artificial 2025 (PwC Brasil, 2025);

the lack of human upskilling remains a significant barrier to AI adoption.

Education and human skills are decisive factors in enabling workers, particularly in occupations with high productivity-gain potential, to benefit from generative AI.

A **lack of upskilling constitutes a critical barrier**, especially in developing economies such as Latin America and the Caribbean, where shortages of foundational skills limit the absorption of productivity and innovation gains enabled by technology[1].

This trend is also evident in the marketing sector:

34% of marketing professionals report that **insufficient team training is a barrier** to implementing AI in operations[2]

This indicates that AI adoption may combine efficiency gains with human and operational challenges, requiring continuous training and ongoing professional adaptation.

Sources: 1. Buffer or Bottleneck? Employment Exposure to Generative AI and the Digital Divide in Latin America (Gmyrek, Winkler & Garganta, 2024); 2. A Realidade do Marketing no Brasil (Hubspot, Canva & HypeAuditor, 2025)

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lack of legal clarity and regulatory gaps weaken the protection of creative work in the context of generative AI

Evidence gathered from sectoral studies indicates that the absence of clear legal frameworks governing the use of generative artificial intelligence may have significant impacts on creative work.

Such regulatory gaps can undermine authorship protection and labor security for those working in creative sectors.

- In **Colombia**, for example, **gaps in labor and copyright legislation related to AI use leave authors unprotected** with respect to the use of their voices and prior works, while failing to define the relationship **between human dignity at work and the deployment of AI systems**[1].
- **In Brazil**, there is still a **lack of objective legal definitions** regarding what constitutes "artificial intelligence," as well as clear rules on authorship and ownership of works created with the assistance of generative systems. This **legal uncertainty creates risks of devaluation of human creative labor and weakens legal certainty for creators**[2].

Sources: 1. Efectos de la Inteligencia Artificial en Derechos Laborales y Creativos en la Industria Audiovisual (2020 a 2024) (Ortiz, 2025), 2. A INTELIGÊNCIA ARTIFICIAL COMO AMEAÇA OU OPORTUNIDADE? UMA ANÁLISE DO IMPACTO NO TRABALHO DOS ROTEIRISTAS (Müller, 2025),

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perceptions of generative AI are generally negative, but concerns are more focused on creative effects, market concentration, and regulation than on substitution

Among Brazilian screenwriters,

Concerns primarily center on the impact of generative AI on creativity and on the concentration of market power among technology companies, even though there is a degree of trust in existing intellectual property rules as a means of protecting authorship.

Overall, a skeptical view prevails regarding the potential of AI to replace human screenwriters.

There is a growing demand for regulation of generative AI within the film industry.

These perceptions resonate with the international context:

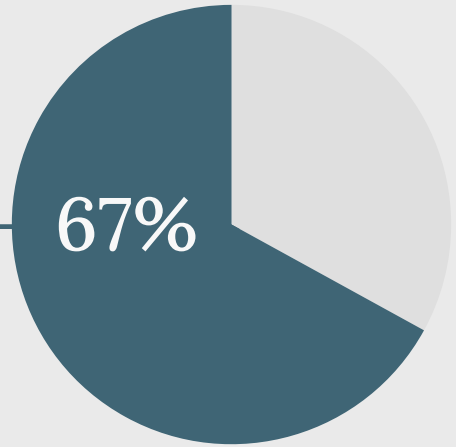
In 2023, the **Hollywood writers' strike** in the United States highlighted similar tensions, centered on demands for authorship guarantees and fair compensation in the face of advancing generative AI. The agreement that ended the strike established clauses **preventing AI systems from being credited as authors and ensuring that human screenwriters retain their credits and compensation**, even when AI is partially used in the creative process.

Source: Direito do autor e inteligência artificial generativa: a perspectiva do roteirista na indústria cinematográfica (Veloso, 2023)

the general public believes AI will expand entertainment options

Within the creative industry context,

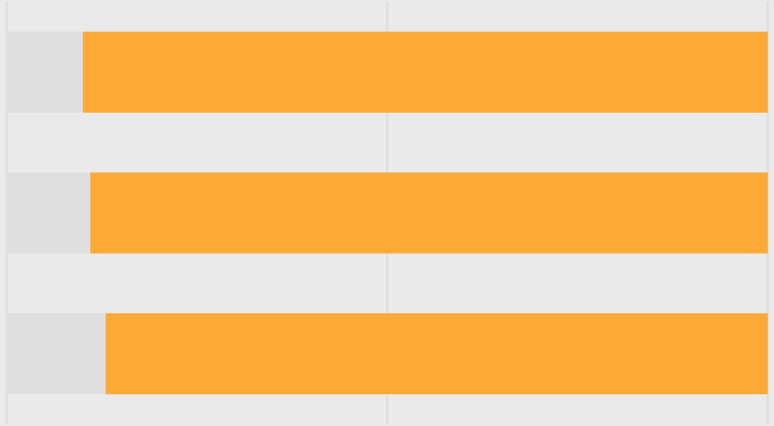
approximately two-thirds of respondents believe that the use of AI will improve their entertainment options (such as films, music, and books) over the next 3-5 years.



Despite concerns related to misinformation and trust in brands, the research points to a mixed but predominantly positive impact, particularly in media, entertainment, and advertising.

Source: The Ipsos AI Monitor (Ipsos, 2025)

perceptions and reported uses among digital creators are generally positive



87% believe AI will enable the global expansion of their content through automated translation.

89% view the technology as an indispensable support for adding value to their work in coming years.

9 out of 10 believe they are not yet using AI to its full potential[1]

Brazil is the second-largest creator market worldwide[2]

However,

71% of creators fear a loss of originality with the use of AI, highlighting the tension between efficiency gains and creative authenticity[2]

Sources: 1. A.I. and Creators: The Future of Tech and Creativity (YouTube & Radius, 2024), 2. Creator Economy 2024: Insights, Achievements, and the Road Ahead (Schwarzwald Capital, 2024)

perceptions

in advertising and marketing, perceptions point to productivity gains and increased ROI with AI adoption

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When incorporating AI into their work:

95.4% of marketing professionals observed a positive impact on ROI[1]

72.3% of marketing professionals reported significant improvements in quality[1]

97.9% of marketing professionals plan to increase their use of AI over the next 12 months [1]

Among the main benefits reported by respondents from using AI were increased efficiency (80%) and greater speed (68%)[2]

Source: 1. A Realidade do Marketing no Brasil. Hubspot, Canva & HypeAuditor , 2025),2. Decodificando os desafios da IA no mercado de publicidade digital (IAB e Nielsen Brasil (2024)

This section analyzes the research data through the lens of the authors of this study

there is a clear gap between empirical data and professional perceptions, an asymmetry that may point to pre-existing structural issues within the sector

Although revenues across companies that comprise the creative industry continue on an expansionary trajectory, both in Brazil and globally, the diffusion of AI technologies has not generated equally positive perceptions among all professionals in the field.

As a working hypothesis, this divergence between macroeconomic indicators and individual perceptions may be linked to historical dynamics, such as the concentration of production infrastructure and intellectual property catalogs, processes that predate the advent of AI.

This inference is reinforced when juxtaposing sustained sector-wide revenue growth, the negative perceptions reported by segments of creators, and projections of income stagnation at the individual level in more traditional sectors, alongside rising corporate revenues.

Such a mismatch reflects a well-known dynamic in cultural markets: productivity gains, in certain contexts, tend to be appropriated by actors who already control production infrastructure, distribution channels, or proprietary rights.

The regulatory challenge, therefore, lies in ensuring that the digital transition of creative sectors, including the adoption of AI, does not exacerbate structural asymmetries between those who create, those who distribute, and those who control proprietary rights and the means of production.

AI may accelerate creative democratization by narrowing the distance between production and consumption

The research data show that **digital creators, precisely the segment with the lowest barriers to entry, are among the most enthusiastic and active users of generative AI**, not only to increase productivity but also to expand their aesthetic language.

This adoption is reconfiguring the symbolic structure of cultural production. Cases such as Marisa Maiô, created entirely with AI by screenwriter Raony Phillips, illustrate how image and video generation tools are making forms of production accessible that were previously restricted to large studios and substantial budgets. The character's viral circulation highlights AI's capacity to lower creative barriers, enabling the construction of new audiovisual narratives.

This form of "creative democratization," however, is not without risks. Content abundance may reinforce new forms of aesthetic homogenization, increase dependence on digital platforms, and make it more difficult to address unlawful practices.

AI literacy remains a major barrier for sectors with lower technological adoption

The widespread appropriation of AI among digital creators contrasts with the resistance observed in sectors with lower capacity for technological absorption, such as traditional audiovisual production and the publishing market.

This is evident in the negative perceptions expressed by some professionals, even in the presence of sophisticated tools for editing, scripting, and design.

This finding points to an **urgent need to place public policies on AI digital literacy at the center of the debate**, not only to promote technical training, but also to foster critical analysis of AI use and of the political economy shaping relationships among creators, entertainment companies, and technology firms.

There is no evidence of mass job losses due to AI, but there are significant indications of the revaluation of roles and professions

The research data indicate that, in Brazil, the creative sector is experiencing job creation and wage growth above the national average, even amid the increasing adoption of AI technologies. In other words, the use of AI has not, thus far, translated into a generalized elimination of jobs. However, there are clear signs of structural reconfiguration of roles and skills - that is, **what is changing is not the number of job openings, but the type of competencies required and who is prepared to meet them.**

This transition tends to favor those who already possess greater cultural and educational capital, while disproportionately affecting less-qualified workers. These findings reinforce the importance of cultural and educational policies incorporating the labor dimension as a structural priority in AI governance. Such policies should focus on **creating conditions for the emergence of new professional profiles** and ensuring that productivity gains driven by AI are socially distributed.

The regulatory agenda has yet to keep pace with the economic and symbolic sophistication of the phenomenon

The research findings indicate that public and regulatory debates on the use of artificial intelligence in the creative industry, particularly in the context of Bill No. 2338/23, are still shaped by a limited understanding of the phenomenon. While public opinion shows increasing familiarity with and openness to AI use, **institutional debates remain centered on more moralistic perspectives and are less connected to economic data and opinion research.**

This asymmetry between public perceptions and regulatory approaches warrants deeper examination in future studies. Although this challenge is not unique to technology-related debates, the legislative process surrounding AI and culture risks producing regulation with low social adherence - failing to adequately grasp how people interact with, consume, and reinterpret technologies in their everyday lives.

conclusion

- **Generative AI is already an integral part of the creative industry**, both in Brazil and globally. The analysis shows that its adoption is concentrated in areas such as marketing, design, and digital content creation. The advancement of these tools is redefining processes, expanding creative possibilities, and reshaping the dynamics of cultural production and circulation.
- The landscape is marked by **ambivalent perceptions** and uncertainty. Among companies and professionals in the creative industry, enthusiasm coexists with apprehension regarding potential losses of control, authorship, and authenticity. Expected **changes in occupational profiles**, including the emergence of new roles and the reconfiguration of existing ones, pose **challenges related to skills development and equitable access to technology.**
- The evidence suggests that the impact of generative AI is highly context-dependent, shaped by public policies, infrastructure, and business practices that condition its economic and cultural effects.
- Even cases highlighting positive evidence come with important caveats, suggesting that the augmentation of creative sector activities through generative AI only materializes when accompanied by technical training, ethical policies, and inclusion mechanisms, ensuring that AI is positioned as a tool that supports, rather than replaces, human labor.
- As a **recent and rapidly evolving phenomenon**, this study was designed as an exploratory effort. It does not seek to exhaust the topic or provide definitive answers regarding the impact of generative AI, but rather to **map emerging evidence and trends that help clarify the direction of this transformation.**

direction for future studies

The study covered materials published up to august 2025, reflecting a socioeconomic context undergoing rapid transformation and impacts that are still in the process of consolidation. For this reason, the findings should be interpreted as a snapshot of a moving landscape, rather than as definitive conclusions.

Extending the timeframe and evidence updates: future research may conduct longitudinal studies and periodic data updates to track the evolution of AI adoption across creative subsectors after august 2025. Given that the growth of generative AI adoption is relatively recent, this approach would allow for the observation of more consolidated trends.

Exploring the hypothesis on individual perceptions and the distribution of gains: future studies may systematically investigate the hypothesis regarding the gap between macroeconomic indicators of the creative industry and the perceptions of segments of professionals. Such an analysis would enable a deeper examination of how pre-existing structural asymmetries within the cultural ecosystem interact with AI adoption, helping to clarify potential distributive effects within the sector.

In-depth qualitative analysis of cultural and ethical effects: as this research relied primarily on secondary data, future studies should develop qualitative approaches (such as structured interviews, netnography, and reception studies with creative industry professionals) to better understand perceptions of authorship, authenticity, and trust in AI-mediated creations.

Professional upskilling initiatives: the consolidation of technologies within the creative industry requires policies that combine digital literacy with technological inclusion. Future research may map educational programs and private-sector initiatives focused on professional training and on the adoption of AI within the creative industry.

Geographic expansion: the current scope, centered on upper-middle-income countries, Brazil, and Latin America, may be expanded to include benchmarks from other regions, enabling comparisons of regulatory strategies, development incentives, and models of technological adoption.

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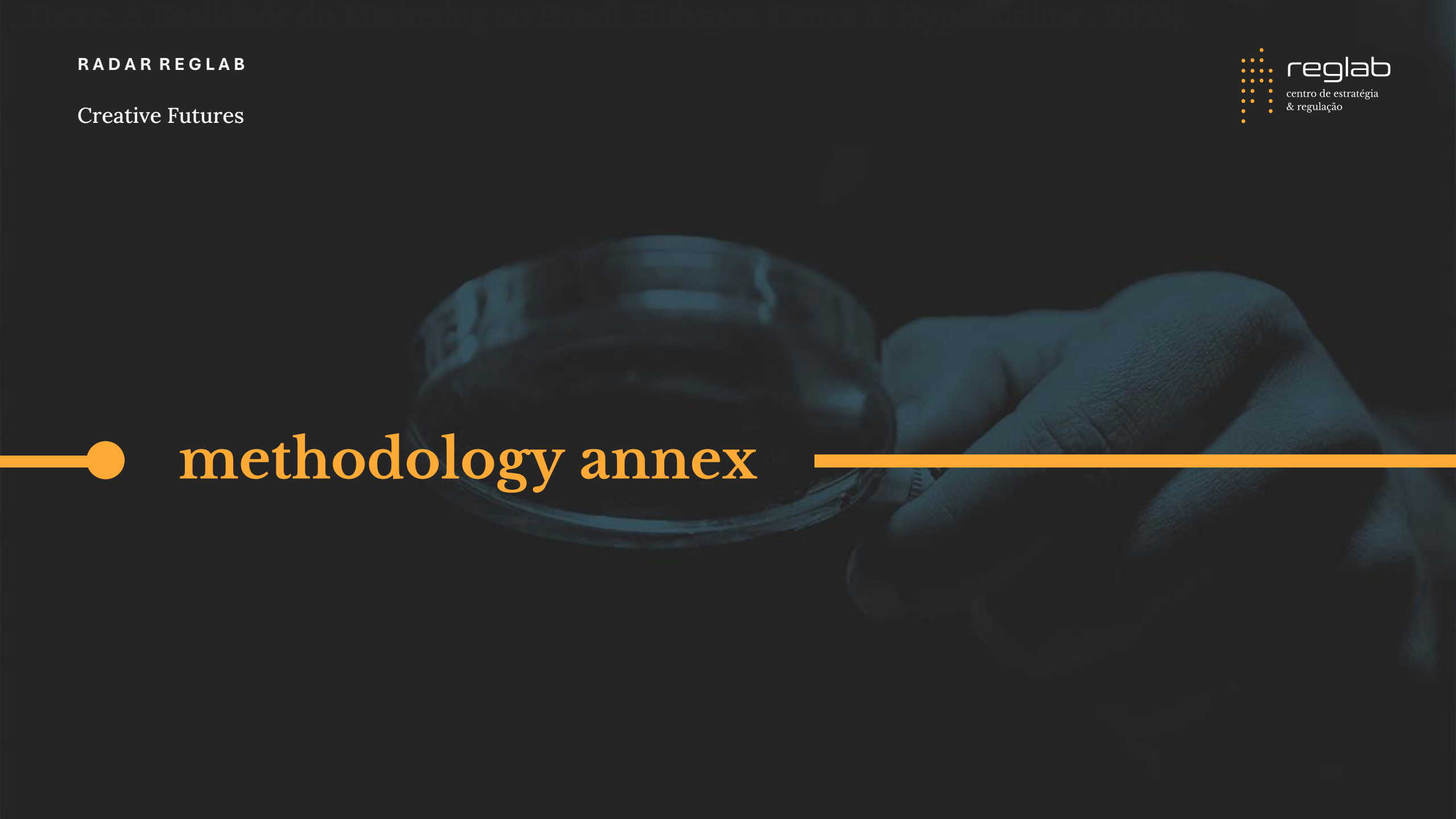


methodology annex

Methodology annex

Methodology

General information

Reglab's research adheres to rigorous methodological standards to ensure objectivity and transparency. All data and findings are available for independent verification, reinforcing the credibility of our studies.

Data collection and analysis were conducted between September 18 and October 30, 2025, with double validation to reduce bias and the use of software tools to organize results.

1. **Data collection**
2. **Data Analysis**
3. **Bias Reduction Procedures**
4. **Additional Information**
5. **Ethical guidelines**

Title of the Study

Creative Futures: How Artificial Intelligence Is Reshaping the Creative Industry in Brazil

Research Question

How is the adoption of generative artificial intelligence technologies transforming - across production, circulation, and value creation - the creative industry in Brazil?

Methodology Summary

This study examines how the adoption of generative artificial intelligence is transforming production processes, circulation dynamics, and value creation within Brazil's creative industry. The methodology is inductive and exploratory, combining documentary analysis and secondary data analysis with qualitative content analysis. Data collection followed criteria focused on empirical materials, encompassing global and Brazilian contexts as well as comparable markets, and applied an evidence-validation model based on the identification of both positive and negative impacts of GAI on the sector. Inferences derived from the dataset were categorized into thematic axes, enabling the identification of trends and transformations across creative subsectors.

Methodology annex

1. Data collection

Data collection was conducted through **documentary analysis of secondary data (desk research)**, using a systematic review of empirical sources. The process involved identifying and selecting materials related to the creative industry and the adoption of generative AI. Predefined criteria guided the inclusion of documents in the study.

General criterion	The study covers publicly accessible materials with a focus on empirical data. It includes academic articles, sectoral reports, databases, search engine results, and AI research tools, applying predefined inclusion criteria. The geographic scope encompasses global, national, and comparable markets - defined as Latin American countries and/or other upper-middle-income economies, according to the World Bank classification (2025–2026).
Search sources	General search engines (Google, Google Scholar); Databases such as Statista and AI research tools (ChatGPT – deep research, Perplexity, DeepSeek).
Data publication period	August 2022 to August 2025
Data collection period	September 18 to october 3, 2025

Methodology annex

1. Data collection

The inclusion criteria used in the source search were based on the **blue team / red team methodological approach**, with the objective of testing opposing interpretations of the impacts of generative AI on the sector and minimizing bias in the research findings. **Inclusion criteria:**

BLUE TEAM: seeks evidence of positive impacts	RED TEAM: seeks evidence of negative impacts
PT: 1. "inteligência artificial generativa" + "crescimento econômico" or "impacto positivo" + "indústria criativa" ou "economia criativa"; 2. "IA generativa" + "novas oportunidades" ou "inovação" + "mídia e entretenimento"; 3. "Inteligência Artificial" + "engajamento" ou "expansão de público" + "setores criativos"; 4. "Inteligência Artificial" + "produção cultural" ou "produção criativa" + "benefícios" ou vantagens"; 5. "Indústria criativa" + "IA generativa" + "Crescimento de receita" ou "geração de empregos".	**PT:** 1. “desemprego” ou “redução de empregos” + “IA generativa” + indústria criativa ou “economia criativa” ou “mídia e entretenimento”; 2. “perdas” + “IA generativa” + “indústria criativa” ou “economia criativa” ou “mídia e entretenimento”; 3. “impactos negativos” + “IA generativa” + indústria criativa ou “economia criativa” ou “mídia e entretenimento”; 4. “disrupção” + “IA generativa” + indústria criativa ou “economia criativa” ou “mídia e entretenimento”; 5. “efeitos adversos” + “IA generativa” + “indústria criativa” ou “economia criativa” ou “mídia e entretenimento”
EN: 1. "Generative Artificial Intelligence" + "economic growth" or "positive impact" + "creative industry" ou "creative economy"; 2. "Generative AI" + "new opportunities" or "innovation" + "media and entertainment"; "Artificial Intelligence" + "engagement" or "audience expansion" + "creative sectors"; 3. "Artificial Intelligence" + "cultural production" or "creative production" + "benefits" or "advantages"; 4. "Creative industry" + "Generative AI" + "revenue growth" or "job creation".	**EN:** 1. “Disruption” + “generative AI” + “creative industries” ou “media and entertainment” ou “creative economy”2. “Employement loss” ou “job reduction”+ “generative AI” + “creative industries” ou “media and entertainment” ou “creative economy”; 3. “negative impacts” + “generative AI” + “creative industries” ou “media and entertainment” ou “creative economy”4. “adverse effects” + “generative AI” + “creative industries” ou “media and entertainment” ou “creative economy”5. “loss of authorship” + “generative AI” + “creative industries” ou “media and entertainment” ou “creative economy”
ES: 1. "Inteligencia Artificial Generativa" + "crecimiento económico" ou "impacto positivo" + "industria creativa" ou "economía creativa"2. "IA generativa" + "nuevas oportunidades" ou "innovación" + "medios y entretenimiento"; 3. "Inteligencia Artificial" + "compromiso" ou "expansión de público" + "sectores creativos"; 4. "Inteligencia Artificial" + "producción cultural" ou "producción creativa" + "beneficios" ou "ventajas"; 5. "Industria creativa" + "IA generativa" + "crecimiento de ingresos" ou "creación de empleo".	**ES:** 1. “disrupcción” + “IA generativa” + “midia e entretenimiento” ou “economía creativa” ou “indústria creativa”; 2. “desempleo” ou “pierda de empleo(s)” + “IA generativa” + “midia e entretenimiento” ou “economía creativa” ou “indústria creativa”; 3. “impactos negativos” + “IA generativa” + “midia e entretenimiento” ou “economía creativa” ou “indústria creativa”; 4. “efectos adversos” + “IA generativa” + “midia e entretenimiento” ou “economía creativa” ou “indústria creativa”; 5.“perdidas” + “IA generativa” + “midia e entretenimiento” ou “economía creativa” ou “indústria creativa”

Methodology annex

1. Data collection

To ensure methodological replicability and transparency, an evaluation matrix based on two axes was applied:

Thematic relevance – the extent to which the material relates to the core concepts of the research and to the predefined criteria. These criteria include:(i) Geographic scope: data from global, national, Latin American, or upper-middle-income country contexts;(ii) Temporal scope: materials published between August 2022 and August 2025;(iii) Sources presenting empirical data.

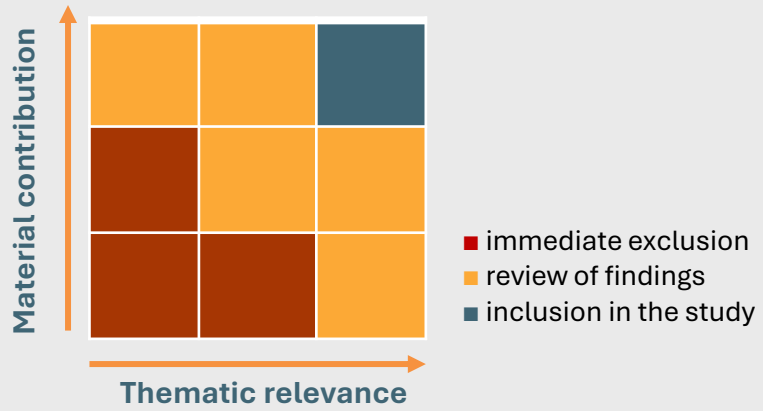
Classification:

- **Low**: contains relevant keywords but they are not central to the study and/or does not meet the inclusion criteria;
- **Medium**: addresses related concepts, but in a tangential manner and/or partially meets the criteria;
- **High**: meets all inclusion criteria and is directly connected to the core research concepts.

Material contribution – the potential of the document to address the research question.
Classification:

- **Low:** does not contribute to answering the research question;
- **Medium:** provides limited or partial contribution;
- **High:** directly contributes to the formulation of the study's analyses and inferences.

Data collection model – review of findings



51 documents were included in the research:

- **9 collected by the Red Team**
- **37 collected by the Blue Team**
- **5 collected through snowballing and expert referral**

2. Data analysis

After the selection of materials based on the predefined inclusion and exclusion criteria, the references included in the study were organized into a consolidated spreadsheet for systematic analysis.

Records were structured into the following columns:

(i) document reference (title, authorship, date, and link);

(ii) source of collection — Blue Team, Red Team, or snowballing (researcher referral);

(iii) document methodology;

(iv) main inferences extracted*; and

(v) region of origin of the document.

*Based on these references, analytical inferences were produced in paragraph form, synthesizing the main findings of each document. A single reference could generate more than one inference. For example, even among sources collected by the Blue Team findings related to risks and challenges of generative AI in the sector were also recorded.

2.1 Content analysis

Using the consolidated table, **the inferences were classified into four main themes**, defined inductively after analysis of the materials:(i) employment;(ii) sector revenues;(iii) types of artificial intelligence use in the creative industry; and(iv) perceptions.

2.1 Data analysis

2.1.1 Thematic classification of inferences

To facilitate understanding of each theme derived from the inferences extracted from the research documents, each category is described below.

- **Employment:** Includes inferences related to the creative industry labor market, encompassing the emergence of new roles, the transformation of existing positions, and the reduction or substitution of jobs in specific subsectors.
- **Sector revenues:** Groups inferences concerning economic and financial data related to the creative industry, such as GDP participation, revenues, subsector growth, and projections of future revenues, both globally and in Brazil.
- **Uses of artificial intelligence in the creative industry:** Brings together inferences on practical applications of generative AI, identifying tasks, workflows, and processes in which the technology is used by creative professionals, including production, editing, creation, and the automation of work stages.
- **Perceptions:** Comprises inferences related to the perceptions and attitudes of different actors within the creative industry, such as executives, creators, artists, and marketing professionals, regarding the impacts, opportunities, and risks associated with the use of generative AI.

These themes served as the basis for structuring the report, guiding the organization of the analyses and results by thematic axis.

3. Bias reduction procedures

We acknowledge that all research, especially qualitative and exploratory in nature, is subject to inherent biases. In Creative Futures, we sought to exercise continuous reflexivity throughout all stages of the study, adopting practices designed to mitigate subjectivity and balance interpretations.

Adoption of predefined criteria

From the data collection stage onward, predefined search and inclusion criteria were applied, including geographic scope (Brazil, Latin America, and upper-middle-income countries) to ensure comparability with the Brazilian context and avoid projections based solely on high-income economies; temporal delimitation; and the prioritization of empirical materials.

Search for evidence with opposing impacts

The study employed a Blue Team / Red Team evidence-validation model, in which different researchers independently searched for positive and negative impacts of generative AI on the creative industry. This division helped reduce the influence of individual perspectives.

Collaborative validation of findings

Search results were stored in a shared database, enabling the exchange of observations and interpretations among researchers. Inferences and classifications were subsequently reviewed by a third researcher, adding an additional analytical perspective.

Documentation and transparency

All stages of data collection, classification, and analysis were documented in spreadsheets and on the research page, ensuring traceability and transparency of the methodological process.

4. Additional information

4.1 methodological limitations

The study covered data published between August 2022 and August 2025.

Materials released after August 2025 were not included. As a recent and rapidly evolving topic, the research is exploratory in nature, reflecting the current stage of available evidence. Only publicly accessible materials were included, which may limit access to proprietary data or internal market studies.

In addition, during data collection, relevant reports and evidence from high-income countries, particularly the United States and European countries, were identified, offering robust data on the use of generative AI in the creative industry. However, these materials were not incorporated into the dataset, in line with the predefined geographic inclusion criteria.

4.2 personal data protection

For this research, publicly available personal data and information contained in reports, statistical databases, and open-access documents were consulted. Access to such data was strictly limited to analytical purposes and to the extraction of inferences related to the references analyzed, without direct use of personal data.

The processing of publicly accessible personal data complied with the principles of purpose limitation, good faith, and public interest that justify their availability. No data were used for individual identification, commercialization, or monitoring.

4. Additional information

4.3 Software use

SOFTWARE	USE IN THE RESEARCH
MS Office	Text editing, spreadsheets, and charts
ChatGPT 4o	Brainstorming, Information systematization, Data structuring, Chart editing, Organization of pre-textual elements, ABNT review, alignment with the Reglab Writing Manual.
Notion and Notion AI	Text editing, Organization of data and files, Chart editing.
NotebookLM	review of secondary data findings
Perplexity	Search tools for identifying secondary data findings
Deep Seek	Search tools for identifying secondary data findings

5. Ethical guidelines

This research was funded by Google Brasil Internet Ltda. To ensure the integrity of this work, **the authors designed, conducted, and analyzed the study independently, without any contribution or interference from the company**, which also did not influence or interfere with the interpretation of the results. The authors retain full professional independence and responsibility for the content and conclusions of this work.

	Respect for privacy and confidentiality. The data used are publicly available and were obtained from accessible sources, without violating the privacy or confidentiality of any individual or institution.
	Responsible use of public data. Although the data analyzed are public, they were used in a responsible and ethical manner, exclusively for the purposes of independent research.
	Methodological transparency. The research methodology was detailed to ensure transparency and replicability, contributing to scientific integrity and enabling independent validation of the results.
	Non-discrimination and respect for diversity. The research was conducted in a manner that respects diversity and avoids any form of discrimination.

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