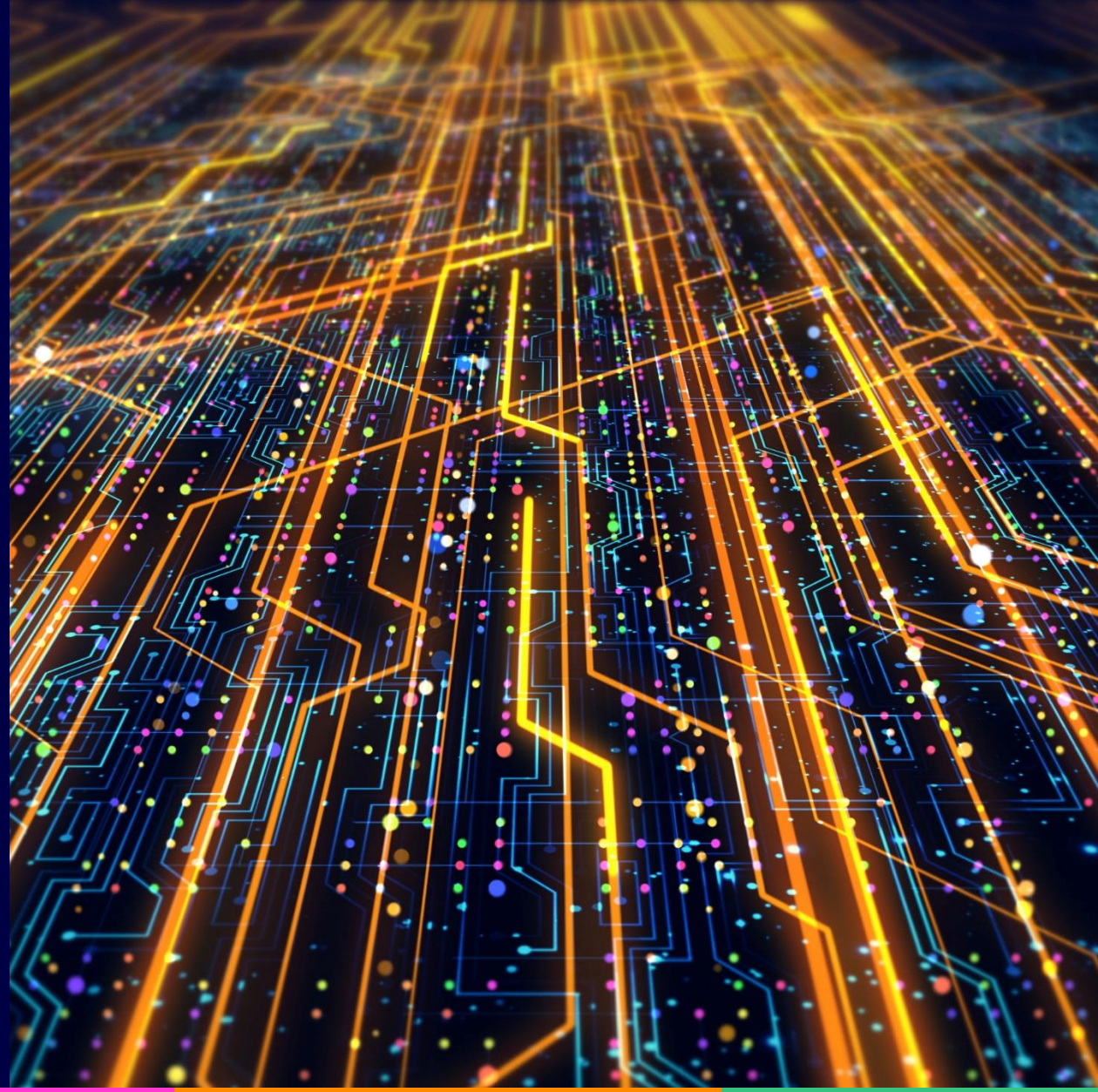
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Ofcom

AI and the telecoms customer experience in the UK

Elizabeth Roberts – Policy Manager

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AI use is becoming mainstream—but telecoms adoption is still emerging

UK customers are increasingly using AI tools in their daily lives and there is some nascent use in telecoms.

GENERAL USE

48%
used GenAI*

23%
used an AI customer – service chatbot*

TELECOMS

8%
used AI in relation to their telecoms services*

6%
used AI to resolve a telecoms issue*

3%
used AI to make a telecoms price, product or service comparison*

Our review examines how AI is being deployed and adopted across the telecoms customer journey, opportunities and risks for customers, and regulatory implications.

*Among UK adult internet users in the past 12 months
Source: Ofcom. Tech Tracker 2026.

Our findings draw on original research and input from ~50 stakeholders

~50

stakeholders

met with Ofcom or submitted evidence

AI labs and developers

Market intermediaries

UK and international regulators

Telecoms providers & trade associations

Consumer groups

Think tanks

ORIGINAL RESEARCH

Quantitative + qualitative

HOSTED EVENTS

2 discussion fora

COMPLAINTS ANALYSIS

Complaints to Ofcom over last 5 years

INTERNATIONAL FORA

CERRE regulatory lab + EU discussions

AI already supports customers across the telecoms journey

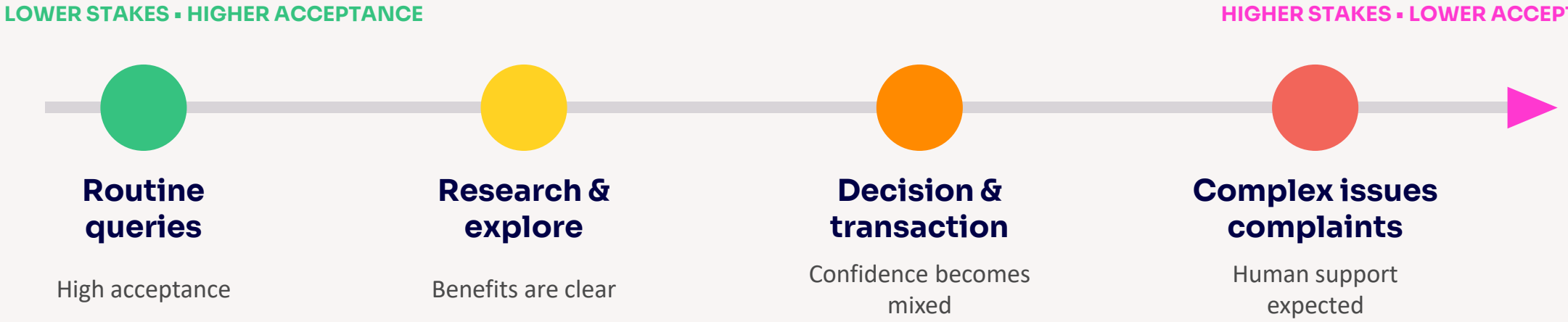
Examples of the capabilities of AI applications in the telecoms customer journey today

	 Consideration	 Set-up	 In-contract	 End of contract
Telecoms providers	GenAI-augmented chatbots answer simple customer queries	On-device AI apps to guide activation or installation step by step	AI supports human agents with real-time advice for routine service cases and troubleshooting	AI-driven insights help human agents tailor renewal offers
Intermediaries*	General-purpose AI assistants and AI-assisted comparison services summarise deals and make comparisons	General-purpose AI assistants help customers understand how to set up a new service	General-purpose AI assistants provide basic information and direct customers to relevant sources of further help	AI-augmented search and advice applications set out switching options

*Intermediaries are distinct from both the telecoms customer and the telecoms provider, and may influence customer decision-making in relation to telecoms services.

Acceptance falls as the stakes rise—and human support remains essential

People welcome the convenience of interacting with AI for routine tasks; trust and acceptance drops when interacting with it at sensitive or consequential moments.



VALUE

Saves time and simplifies complex information

TRUST

Accuracy, reliability and motivation are concerns for some

CHOICE

AI should support—not replace—human contact

Views vary widely depending on need: consensus that customers should be able to choose the channel that works for them.

Source: Jigsaw. 2026. Exploring the impact of AI on the telecoms customer journey.

Benefits are real—but transparency and human access remain essential

POTENTIAL OPPORTUNITIES AND RISKS

GenAI-augmented telecoms chatbot

OPPORTUNITY

24/7 help for routine queries; more personalised service; access to most up-to-date info

RISK

Inaccurate or circular answers; unclear when engaging with AI vs. human; difficult human escalation

AI-augmented search and advice

OPPORTUNITY

Help customers to identify services that align with needs and preferences

RISK

Inaccurate, incomplete and uncited results; hidden commercial influence

LIMITED EVIDENCE OF SYSTEMIC HARM SO FAR

- Complaints show frustration, inaccurate information and difficulty reaching a person – but no systemic harm has been identified so far.
- **Our existing rules and regulatory framework allow us to protect consumers effectively.**
- We have clarified our expectations that providers must ensure that **customers can recognise Gen-AI interactions** and **AI must not obstruct human support.**

Future AI services could improve access—but raise questions about fairness and agency

DEVELOPMENT	OPPORTUNITY	RISK
More accessible and tailored communications	Clearer, more accessible support—especially for those with additional needs	Uneven access or AI literacy could reinforce inequality or disadvantage vulnerable customers
Hyper-personalisation	Offers adapt to customers' changing needs and preferences	Opaque pricing or discriminatory decisions could lead to 'unfair' outcomes or make comparisons harder
One-stop AI intermediaries and personal AI agents	Less effort to find, compare and switch services	Reduction in customer agency; unclear commercial influence; consent and redress become less clear

POTENTIAL REGULATORY ISSUES

Transparency ▪ Accountability and redress ▪ Meaningful consent ▪ Reinforcing existing inequalities ▪ Impact on vulnerability

Existing rules enable us to protect consumers effectively—but Ofcom is ready to act

We will support innovation while monitoring for customer harm.

- AI use in telecoms is emerging but we expect deployment and adoption to accelerate.
- Recognise benefits and risks.
- So far, our rules enable us to protect consumers effectively, but we emphasise our expectations around **transparency** and ensuring **AI does not act as a barrier to human contact**.
- We expect AI innovation to pose new regulatory challenges in the near future.
- We will stay across AI developments, so we can react and intervene as appropriate if harms emerge.

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Thank you

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