

The Telecommunications Marketing AI Impact Report

AI Ambition, Adoption, and Critical Disconnects in Telecommunications Marketing



The AI Decisions Made Today Will Determine Tomorrow's Winners

AI has officially rewritten how telecommunications consumers buy and marketers sell. Discovery now starts in AI-native interfaces, and purchase decisions unfold through a zigzag of clicks, conversations, and AI-driven interactions. All the while, telecommunications marketers are adopting AI to engage, track, optimize, and connect every touchpoint along the way.

The result is a buyer journey that rewards brands using AI to connect first-party signals end-to-end and penalizes those still treating AI as a side project. Nearly 90% of survey respondents stated that the AI winners in their category will be determined within the next 12 months, indicating that telecommunications marketers understand this is a leaderboard moment, not a pilot year.

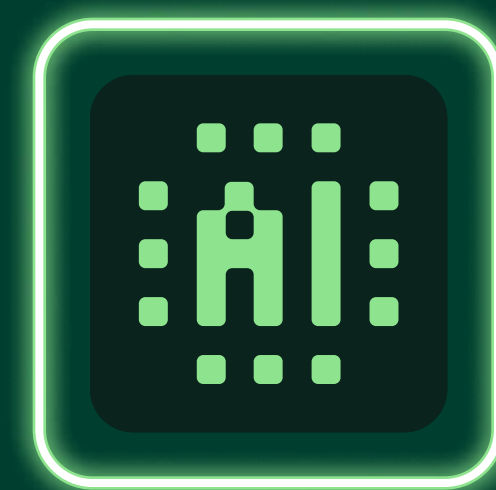
But this urgency often outpaces reality. Most telecommunications respondents believe that pausing AI would jeopardize 2026 targets. However, most telecommunications organizations still allocate a minority of their martech budgets to AI, though notably fewer feel current AI spending is already too high compared to other industries. That disconnect signals less a lack of belief than a struggle to turn investment into measurable outcomes.

Many also fail to execute on first-party, unstructured data sources and take action on that data in real time, making it difficult for them to meet the demands of the new AI-powered buyer journey. Buying journey optimization is only as strong as the weakest link, and this lack of first-party data execution is creating a critical gap.

At the same time, overconfidence is compounding the risk of overlooking these shortcomings. The vast majority of telecommunications marketers believe they are moving at the right speed on AI. This is fueling a bias for speed and tolerance for risk, which can be a powerful asset or lead to significant blind spots.

We surveyed 600 marketers, including 100 U.S. telecommunications marketing professionals, for The Marketing AI Impact Report to provide marketing leadership with a clear view of the industry's trajectory. The report quantifies where ambition, budgets, and capabilities diverge; where operational latency undermines ROI; and where perception breaks from customer reality.

The results of the survey show that strategic decisions made today about AI investment, adoption, and integration will unequivocally define your market position tomorrow. It's clear that it's time to make bold AI moves, but not without being informed of the hurdles, potential pitfalls, and sentiment on the ground floor.





The Prevailing Mindset Is An Atmosphere Of Optimism And Urgency

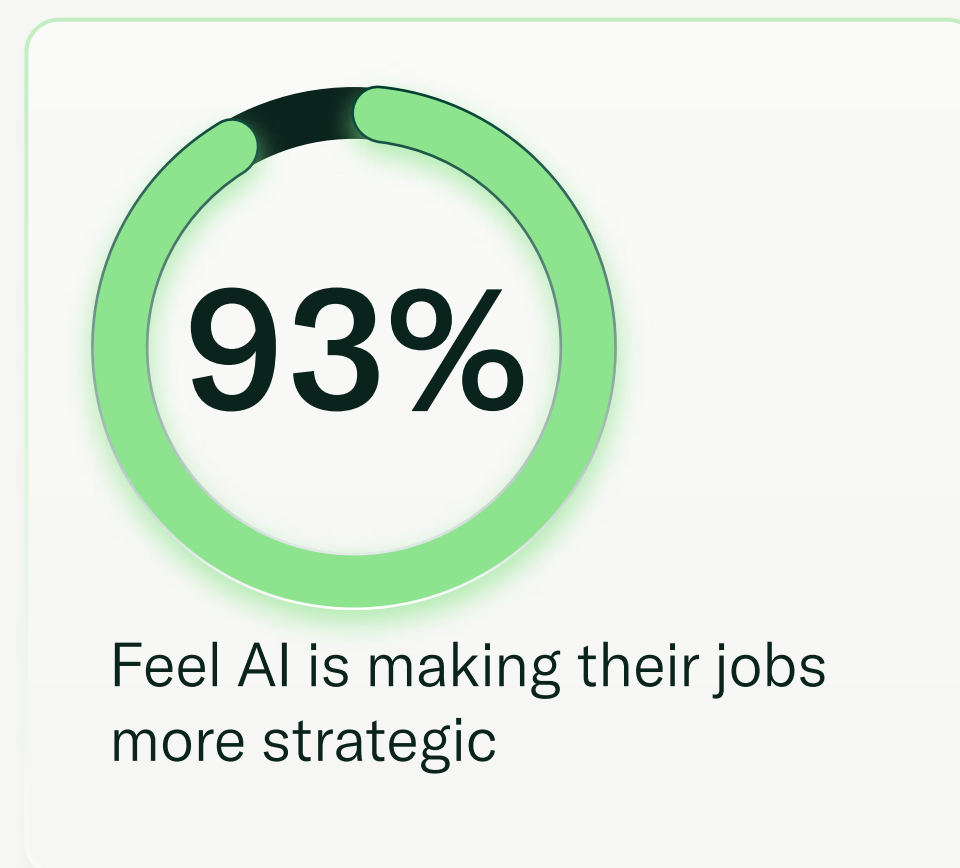
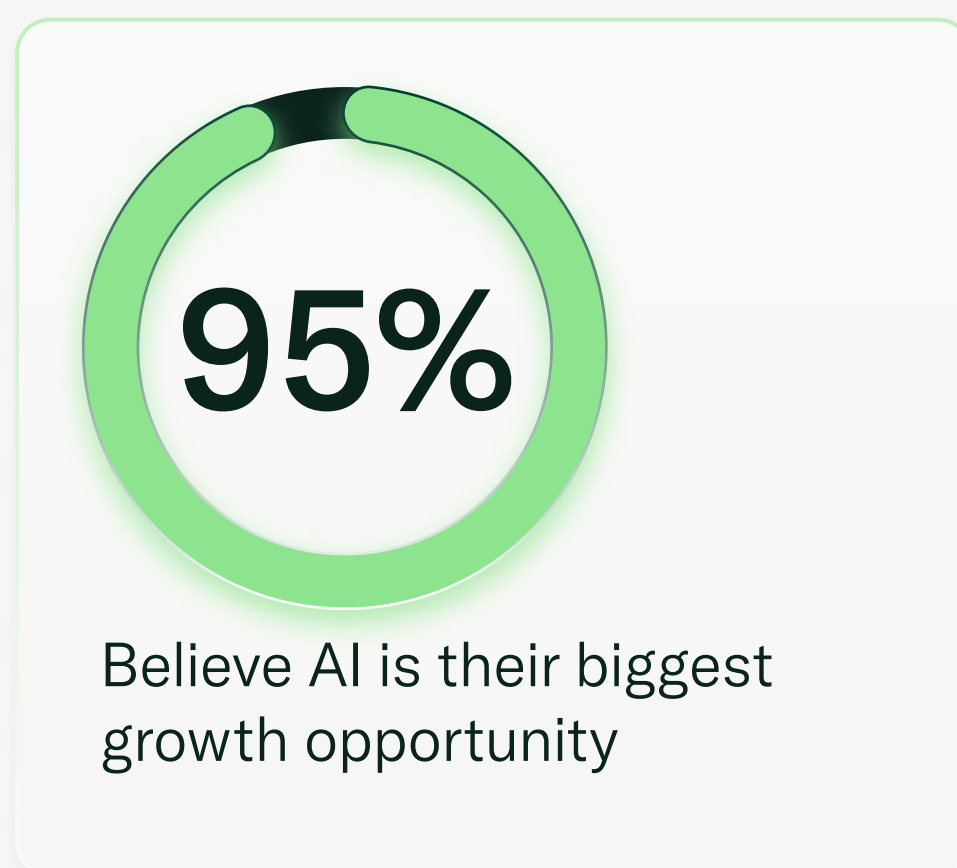
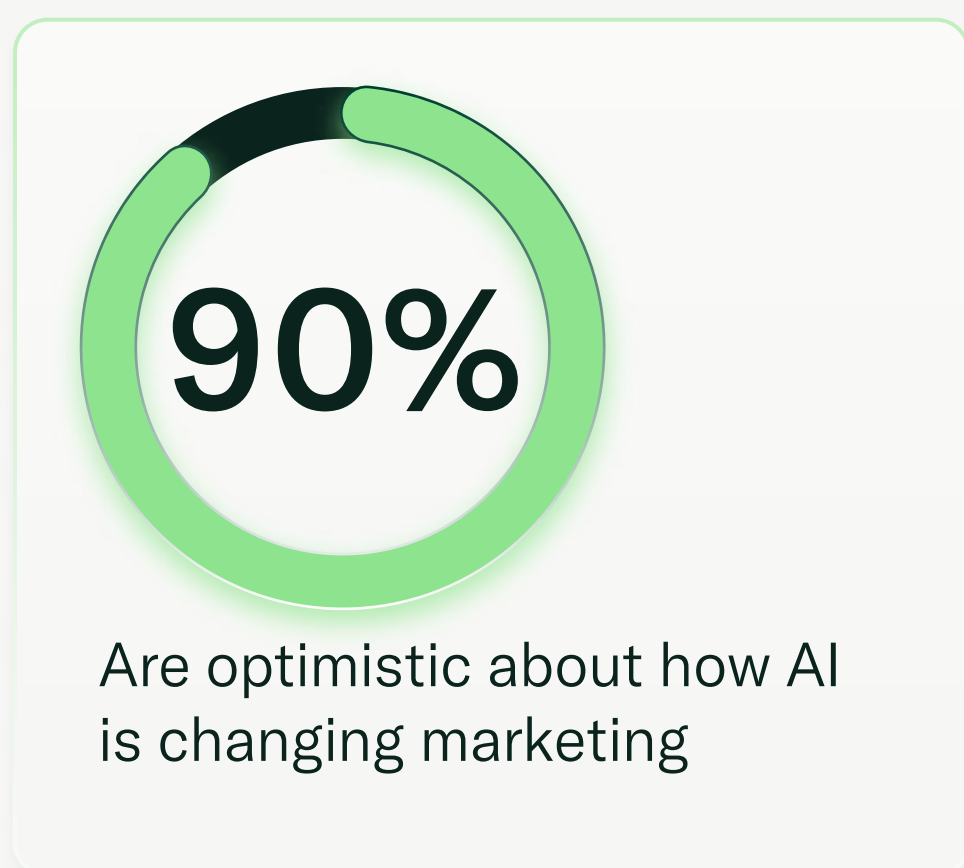
To understand the current state of AI in telecommunications marketing, one must first grasp the collective mindset of its practitioners. This combination of powerful optimism, intense competitive pressure, and personal stress is the primary engine driving the rapid pace of AI adoption and shaping critical investment decisions. This psychological landscape is not merely a backdrop; it is the force propelling the industry forward.



Overwhelming Optimism Is The AI Catalyst

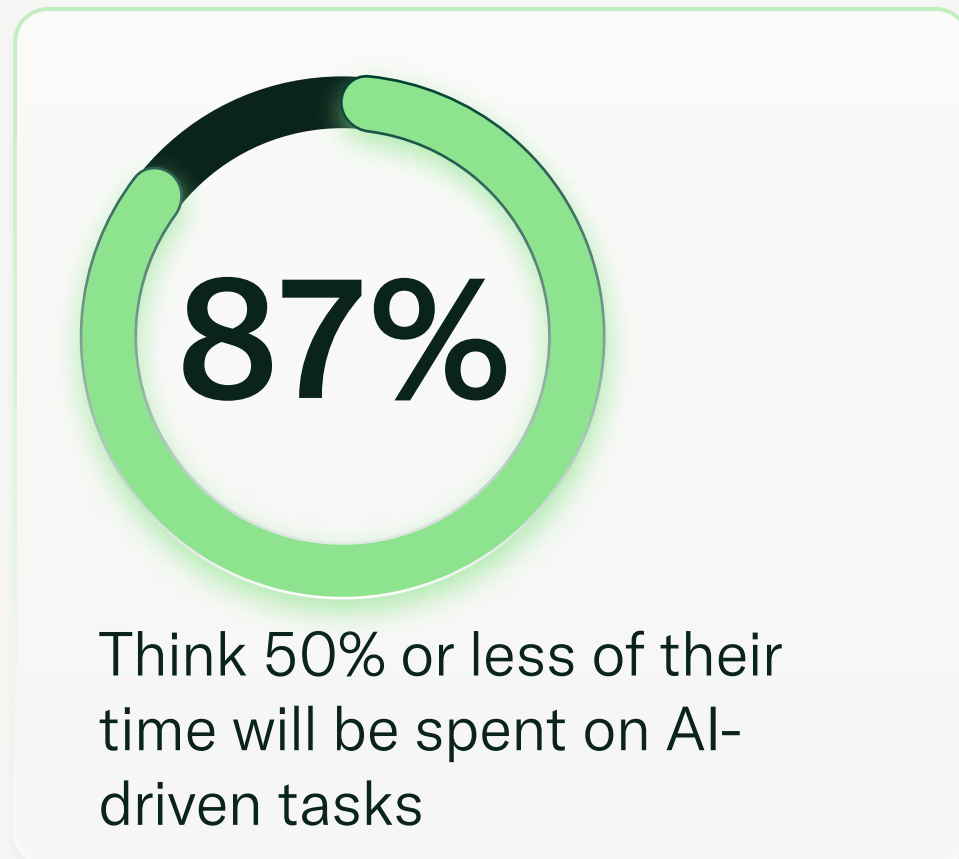
Telecommunications marketers are not just accepting AI; they are embracing it with remarkable enthusiasm, viewing it as a transformative force for both their organizations and their personal careers. This optimism serves as a powerful catalyst for change and investment.

An overwhelming 90% of telecommunications marketers are "very" or "somewhat" optimistic about how AI is changing the marketing landscape. Telecommunications marketers also see AI advancing their careers, with a striking 95% believing it is the single biggest growth opportunity in their careers (notably higher than the 84% overall) and 93% reporting that it is already making their work more strategic (also higher than the 84% overall).



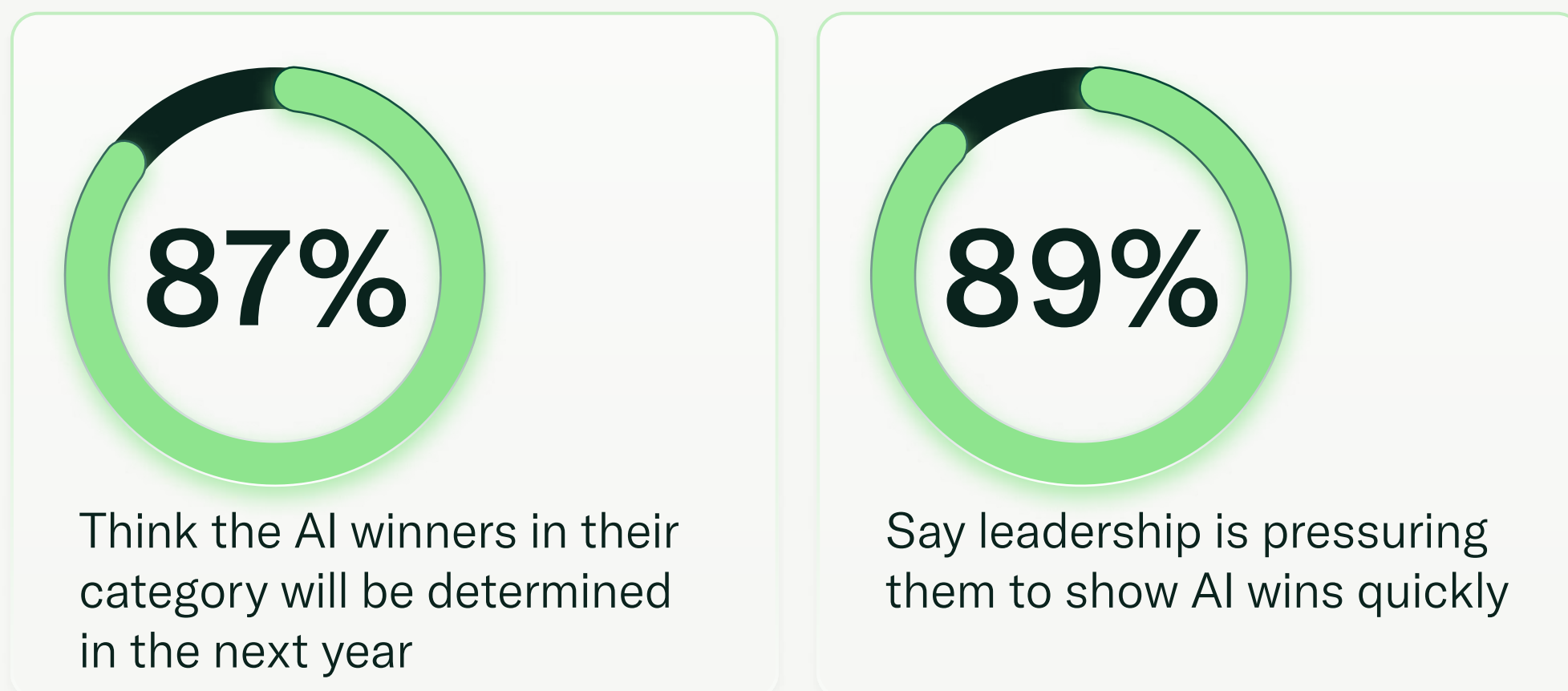
Humans Will Stay In The Loop

While telecommunications marketers are optimistic about AI, they don't think it will replace them. They firmly believe that humans will stay in the loop. A significant 87% believe that 50% or less of their time will be spent using AI tools to do their jobs, and only 13% think that AI-driven tasks will take up more than 50% of their time. This is notably higher than the overall sample, where 75% expected AI to occupy half or less of their time, suggesting telecommunications marketers are even more confident about maintaining human centrality.



The High-Stakes Race For AI Supremacy

Beneath the surface of this optimism lies an intense sense of urgency. The industry views the current moment as a pivotal opportunity to establish AI leadership. This belief has created a high-stakes environment where inaction is seen as the greatest risk.

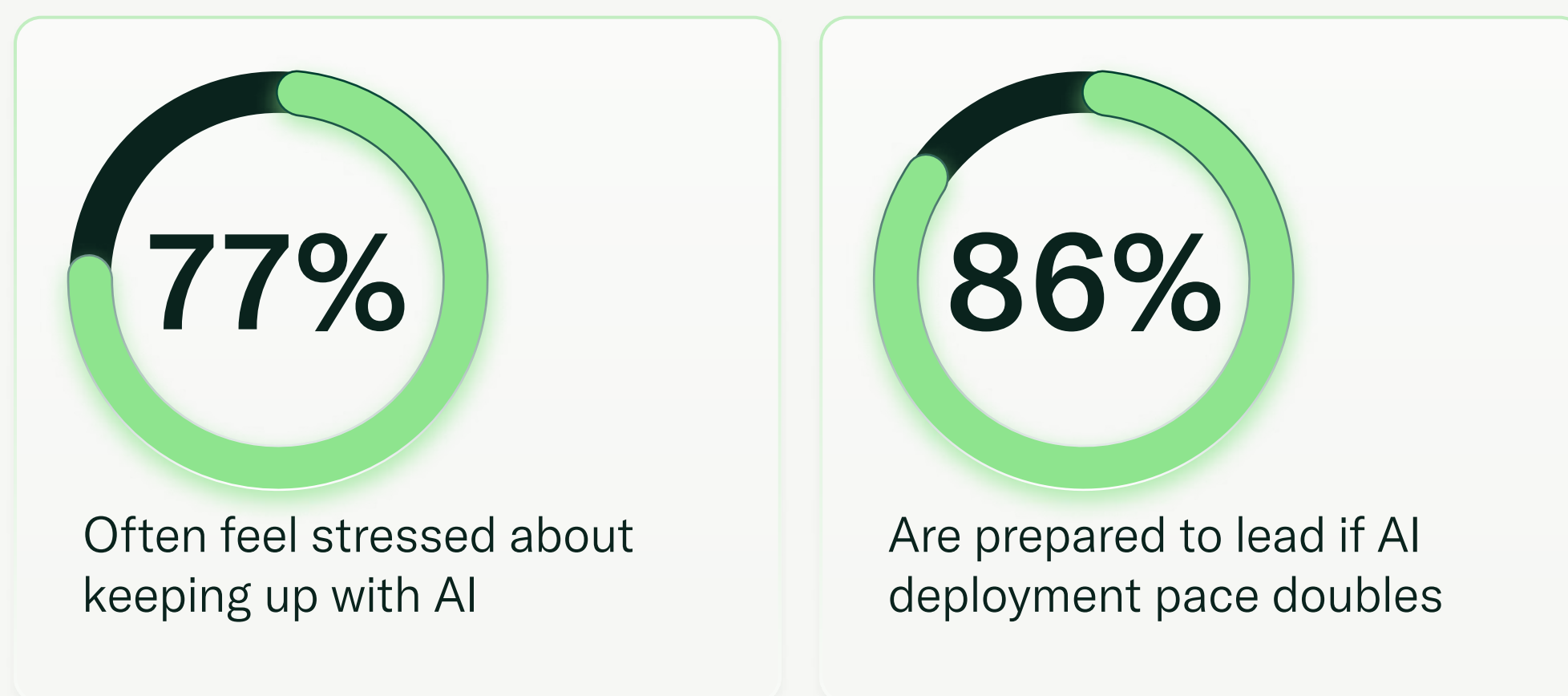


The data reveals a widespread conviction: 87% of telecommunications marketers believe the next 12 months will determine the AI winners in their category, and a striking 89% report that their leadership is pressuring them to demonstrate AI wins quickly (notably higher than the 80% overall).

The Personal Toll Of The AI Revolution

This industry-wide sprint comes with a significant personal and professional toll. While telecommunications marketers feel equipped for the challenge, the relentless pace of innovation is a considerable source of pressure.

A significant majority (77%) report that they "often" or "very often" feel stress or urgency about keeping up with AI.



In a testament to their commitment, this stress is contrasted by a high level of personal readiness, with 86% feeling prepared to lead or contribute effectively even if their organization were to double its pace of AI deployment.

Telecommunications Marketers Have Concerns About Job Impacts

While telecommunications marketers are very optimistic about AI, they have mixed expectations about how it will impact their roles. A notable 41% expect pressure to hit outcomes will increase—significantly higher than the 22% in the overall sample—representing one of the most substantial differences between telecommunications and other industries. Only 22% expect their workload to decrease, and 21% anticipate fewer repetitive tasks. However, 25% worry it will make their roles less creative, and over a third think there's a danger that it will make their roles less important.

How Telecommunications Marketers Expect AI to Change Their Roles in the Next Year

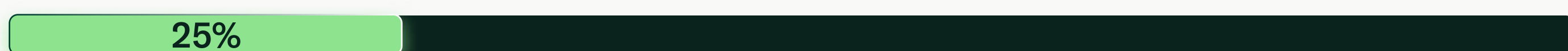
Workload will increase



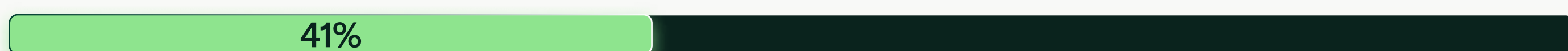
Workload will decrease



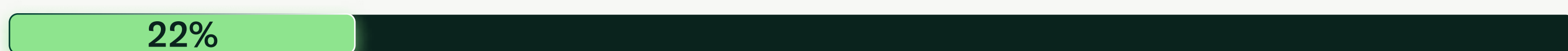
My role becomes less creative



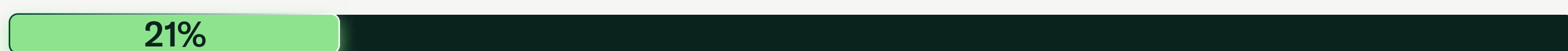
Pressure to hit outcomes will increase



Fewer repetitive tasks



My role becomes less important



This potent psychological cocktail of ambition and anxiety is the driving force behind strategic decision-making, setting the stage for major financial commitments.

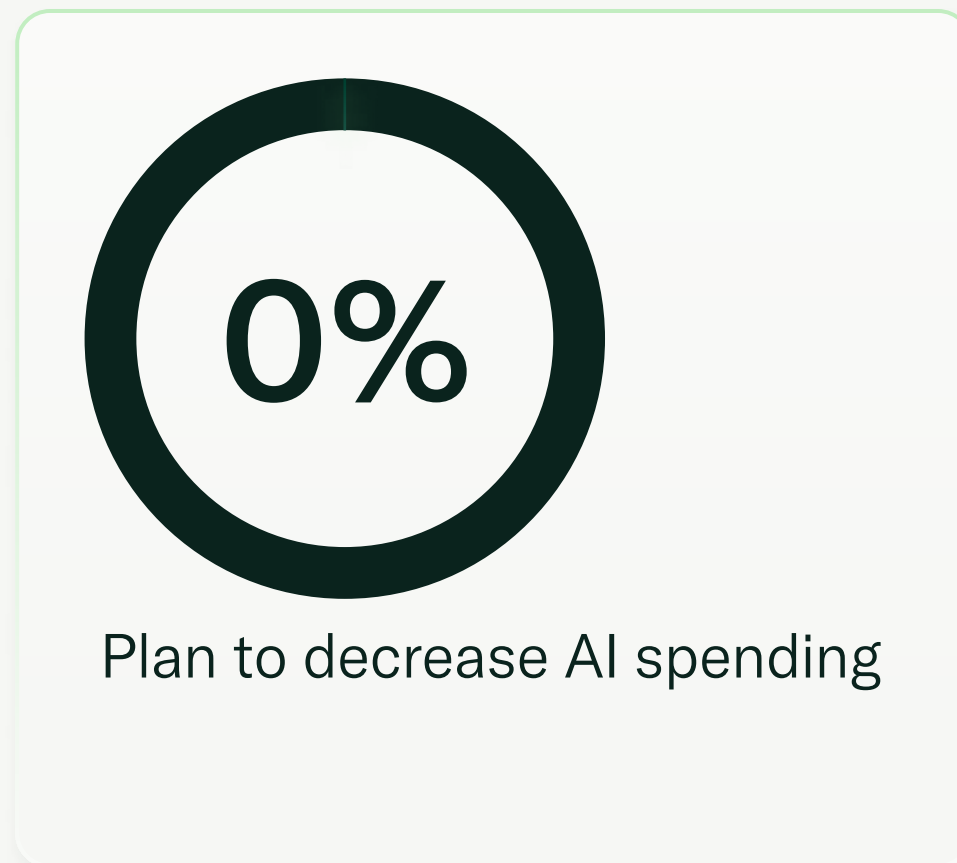
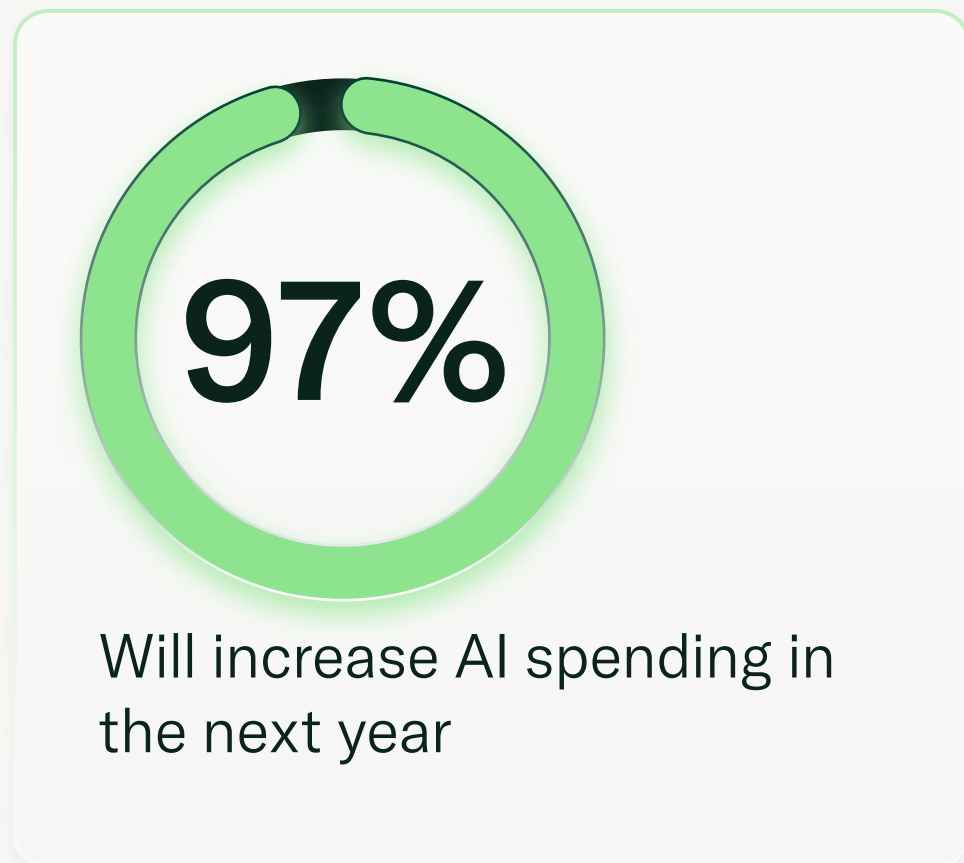


How Telecommunications Marketers Are Reconciling Ambition With Budget Allocation

While sentiment is a powerful motivator, an organization's true priorities are ultimately revealed in its budget. The survey data uncovers a series of contradictions between the stated strategic importance of AI and the actual financial resources being allocated, highlighting a critical disconnect between ambition and action.

Unwavering Commitment To Increased Investment

At a high level, the commitment to AI appears absolute. A commanding 97% of telecommunications marketing organizations plan to increase their investment in AI over the next 12 months, notably higher than the 90% for the overall sample. None plan to decrease spending, signaling near-unanimous agreement on the necessity of continued investment.

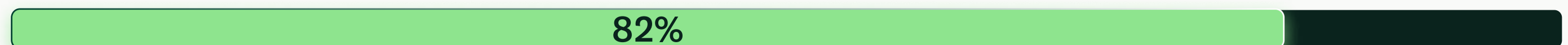


A Contradiction In Perceived Spending

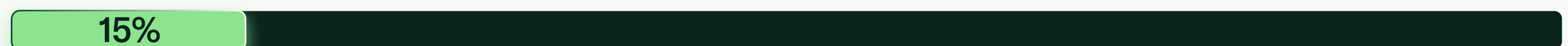
Despite the overwhelming consensus to increase spending, there is a telling disconnect in how telecommunications marketers perceive current investment levels.

How telecommunications marketers perceive their organization's current investment in AI

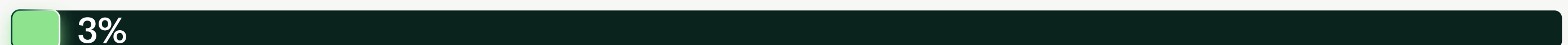
Investing the right amount



Investing too much



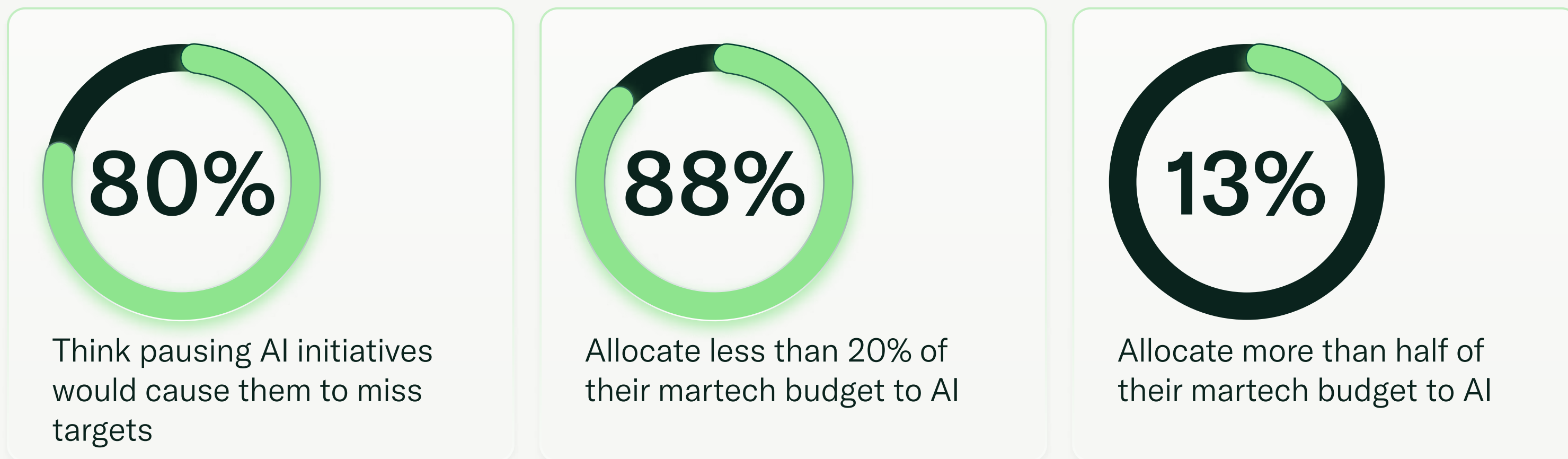
Not investing enough



While a majority (82%, notably higher than the 67% of the overall sample) believe their company is investing the "right amount," 15% feel they are investing "too much" (notably lower than the 28% overall). Conversely, only 3% feel their organization is not investing enough. This suggests telecommunications marketers are more satisfied with current investment levels than marketers in other industries, though the issue may still be one of efficiency or a disconnect between central AI spending and the tangible tools available to marketing teams.

The Budget-Expectation Mismatch

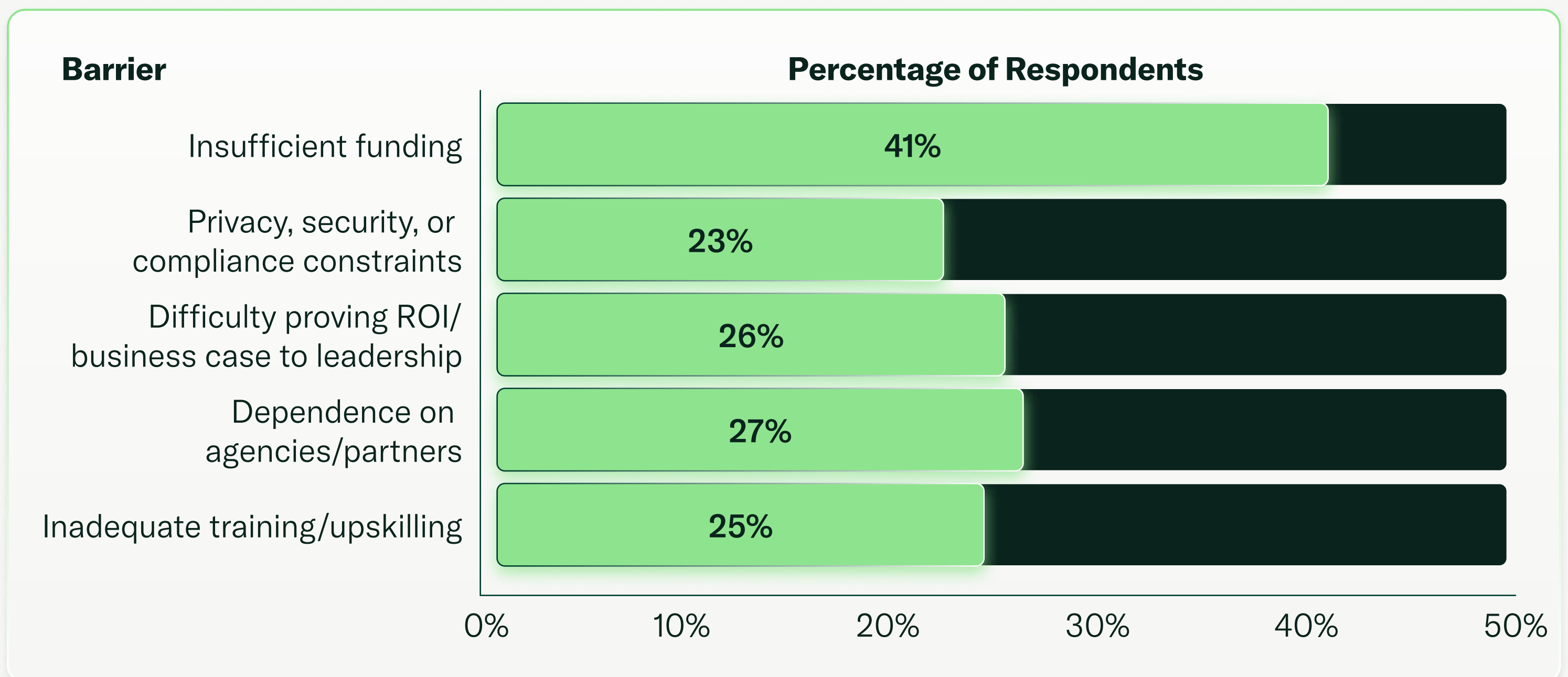
The most significant paradox emerges when comparing strategic expectations to martech budget allocations. An overwhelming 80% of telecommunications marketers believe that pausing AI initiatives for just 12 months would likely cause them to miss their key 2026 targets.



Yet, this "do-or-die" perspective is not reflected in budget planning. A staggering 88% of telecommunications organizations allocate 20% or less of their martech budget to AI (significantly higher than the 68% overall), and only 13% dedicate more than half of their budget to these critical tools.

Identified Barriers To AI Advancement

This mismatch may be explained by the significant hurdles telecommunications organizations face in scaling their AI efforts. The primary obstacles are not a lack of will but a complex mix of financial, regulatory, and organizational challenges.



Notably, insufficient funding ranks as the top barrier at 41%, significantly higher than the 29% in the overall sample, suggesting telecommunications organizations face particularly acute budget constraints despite their high ambitions.

This investment paradox reveals the first critical disconnect: the ambition for AI leadership is not yet matched by the reality of budget allocation.



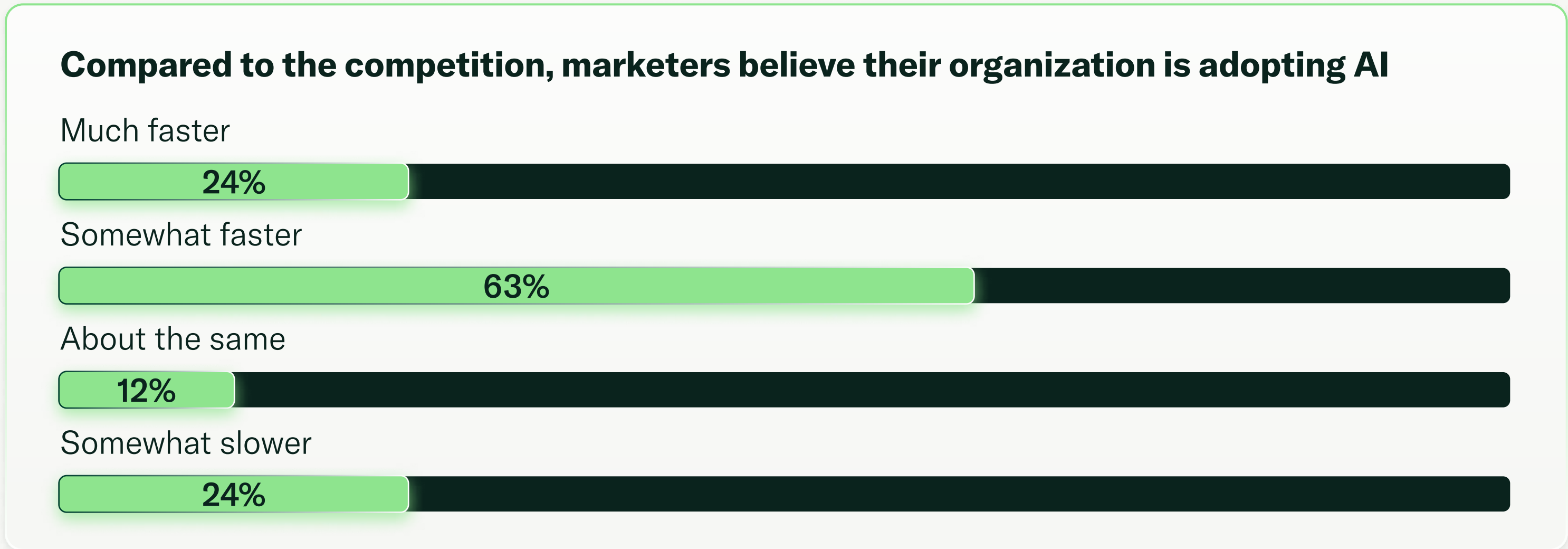
The Confidence Conundrum: A Widespread Overestimation Of AI Prowess

Organizational self-perception can be a powerful asset or a significant strategic blind spot. The survey data reveals a striking level of confidence among telecommunications marketers, though self-assessments of internal AI expertise are more grounded than those of some other industries. This confidence gap could lead organizations to underestimate emerging threats and miscalculate strategic risks.



The "Ahead Of The Pack" Illusion

The data points to a systemic overestimation of competitive maturity, a statistical improbability where 87% of respondents believe their organization is adopting AI "much faster" or "somewhat faster" than its closest competitors.

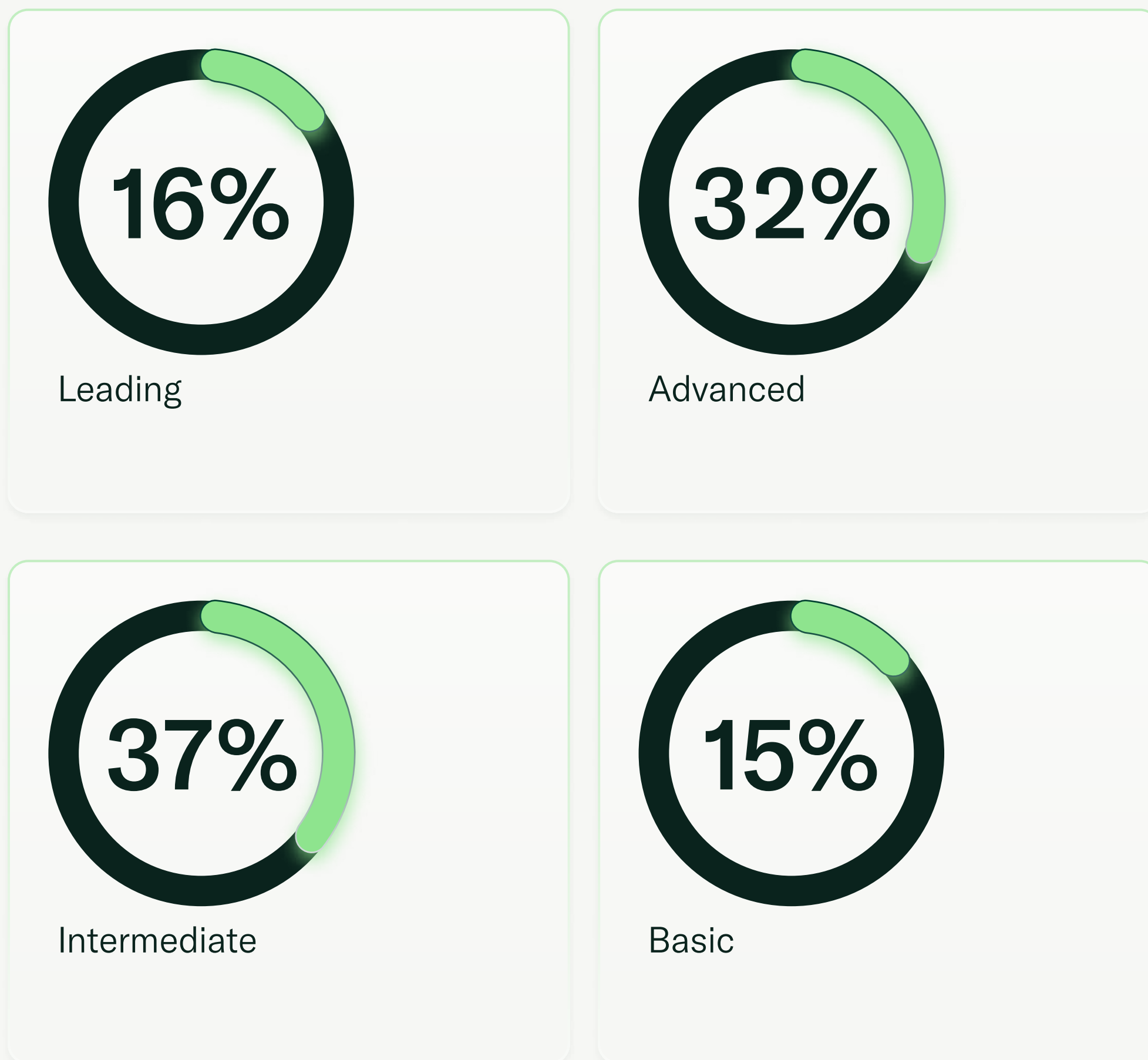


The strategic implication is clear: a vast majority of the market may be operating with an inflated sense of their competitive advantage, potentially leading to complacency and a failure to recognize the true pace of innovation set by rivals.

A More Sobering View Of Internal Expertise

Self-assessments of internal AI expertise are relatively modest compared to some other industries. While ratings vary by specific capability, such as personalization or ad optimization, telecommunications organizations' self-ratings show room for growth.

Compared to the competition, telecommunications organizations' AI capabilities are

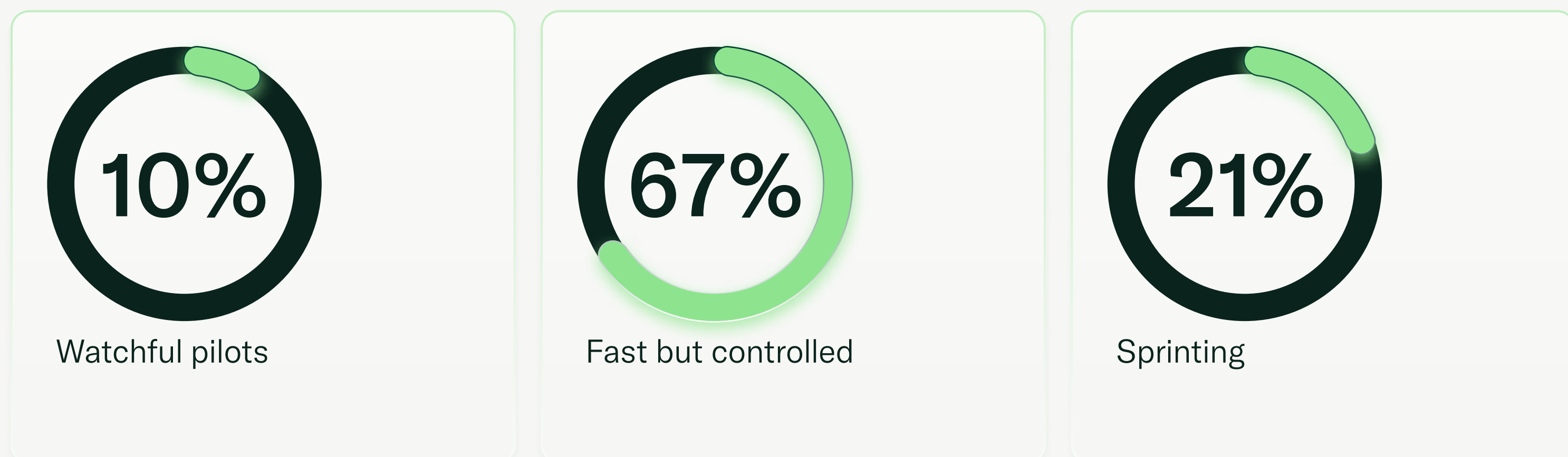


Notably, telecommunications marketers rate their personal expertise at nearly identical levels, indicating a strong alignment between perceived individual and organizational capabilities.

Deployment Posture Is Past The Pilot Phase

This confidence is reflected in the industry's operational posture. The era of cautious AI experimentation is largely over.

AI deployment posture



The data shows that only 10% of telecommunications organizations are in a "watchful" AI pilot stage. The vast majority are moving decisively, with 67% describing their approach as "fast but controlled" (notably higher than the 58% overall) and another 21% "sprinting" to secure a competitive advantage, accepting the risks that come with that velocity.

This confident, aggressive posture directly informs how organizations are approaching the inherent risks of a fast-moving technological revolution.

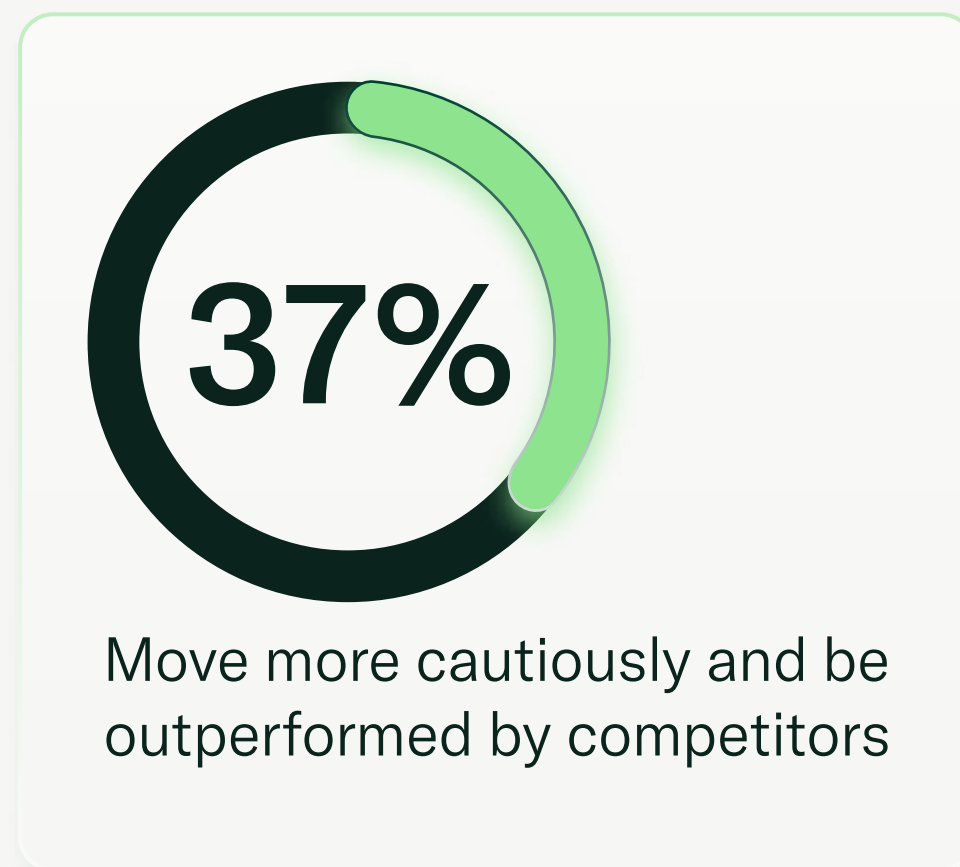
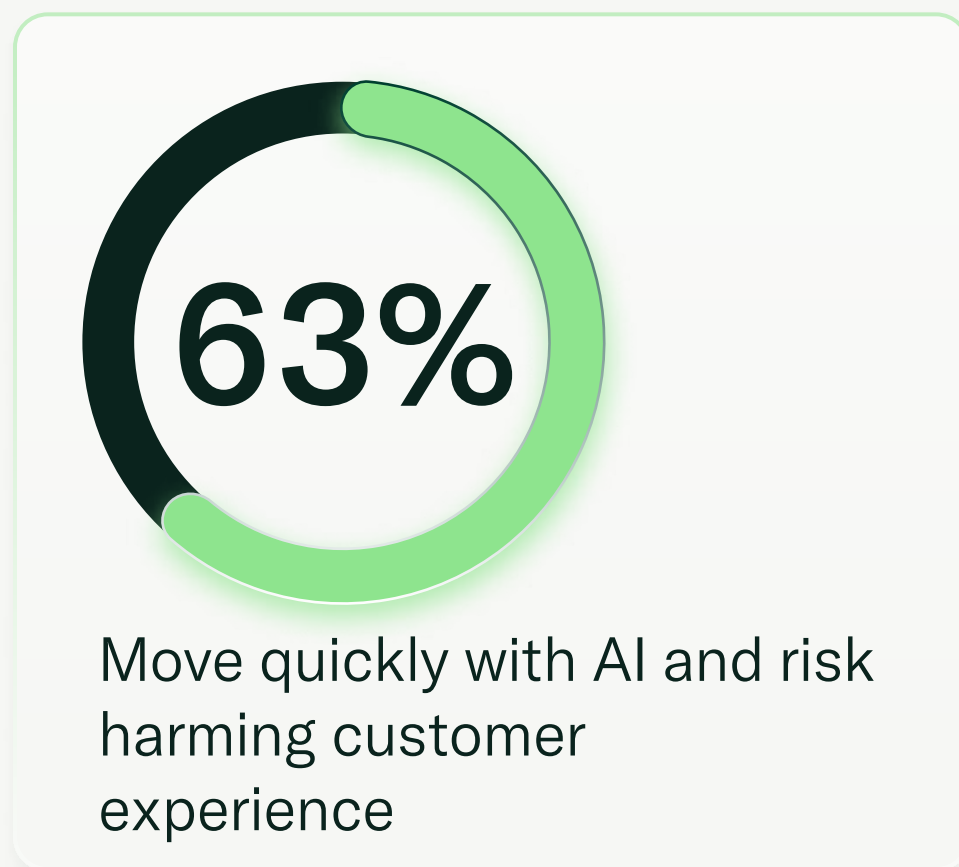


High-Stakes Strategy: The Industry's Gamble On Speed

Telecommunications marketing leaders today face a classic strategic dilemma: move fast to capture a first-mover advantage, or move cautiously to protect brand reputation and customer experience. The survey reveals that in the high-stakes race for AI supremacy, the industry is prioritizing speed, creating a dynamic where risk tolerance is high and potential consequences are significant. The strategic question is how to gain speed without committing avoidable errors.

Prioritizing Pace Over Perfection

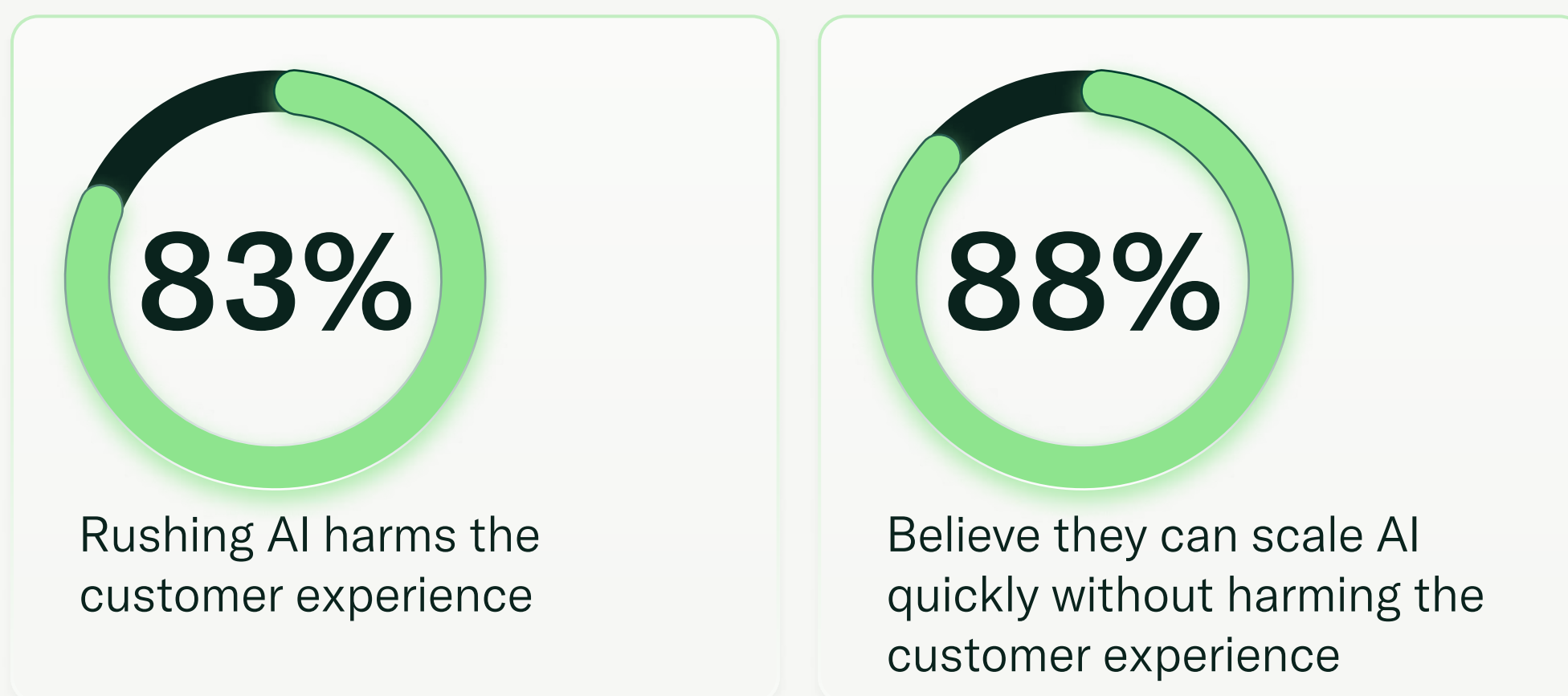
The most stark finding on risk tolerance comes from a direct choice presented to telecommunications marketers. When forced to decide between two negative outcomes, a clear majority (63%) stated they would rather accept the risk of harming customer experience and brand trust than be outperformed by competitors (37%). This "win-at-all-costs" attitude underscores the intense pressure to keep pace in the AI race.



The Risk-Confidence Paradox

This reveals a cognitive dissonance at the heart of AI strategy: telecommunications marketers simultaneously acknowledge the risk of rapid deployment while expressing supreme confidence in their ability to avoid it. First, a large majority (83%) agree with the statement, "Rushing AI risks hurting our customer experience" (notably higher than the 74% overall).

Yet, in a seemingly direct contradiction, an even larger majority (88%) is confident that their organization "can scale AI quickly without harming customer experience or brand."



This belief that "risks apply to others, not to us" reflects the widespread confidence that telecommunications organizations can successfully navigate AI adoption.

Dueling Concerns: The Risks Of Moving Too Fast Vs. Too Slow

The specific anxieties diverge based on an organization's perceived AI pace, with slow movers fearing market loss and fast movers fearing internal breakdowns. Notably, telecommunications marketers show distinct concern patterns compared to other industries.



Concerns if Moving Too Quickly

Internal change fatigue or backlash

50%

Wasted spend on unproven tools/automation

50%

Model/automation errors that are hard to diagnose

50%

Damaging customer experience/brand trust

42%

Compliance/privacy violations

42%

Tech debt/vendor lock-in

42%



Concerns if Moving Too Slowly

Budget cuts/reduced influence

67%

Slower innovation/testing velocity

67%

Falling behind on measurement/attribution

44%

Higher CAC/lower ROAS vs peers

33%

Talent retention/recruiting risk (team wants to work with modern tools)

33%

Loss of market share to faster adopters



22%

Telecommunications marketers exhibit two notable differences: they are significantly less concerned about losing market share to early adopters than the overall sample (22% vs. 39%), and are more concerned about wasted spend on unproven technologies (50% vs. 38%).



This strategic balancing act between speed and safety ultimately depends on how effectively AI is being operationalized within the marketing function.



Gaps In Application And Insight Activation Are The Operational Reality

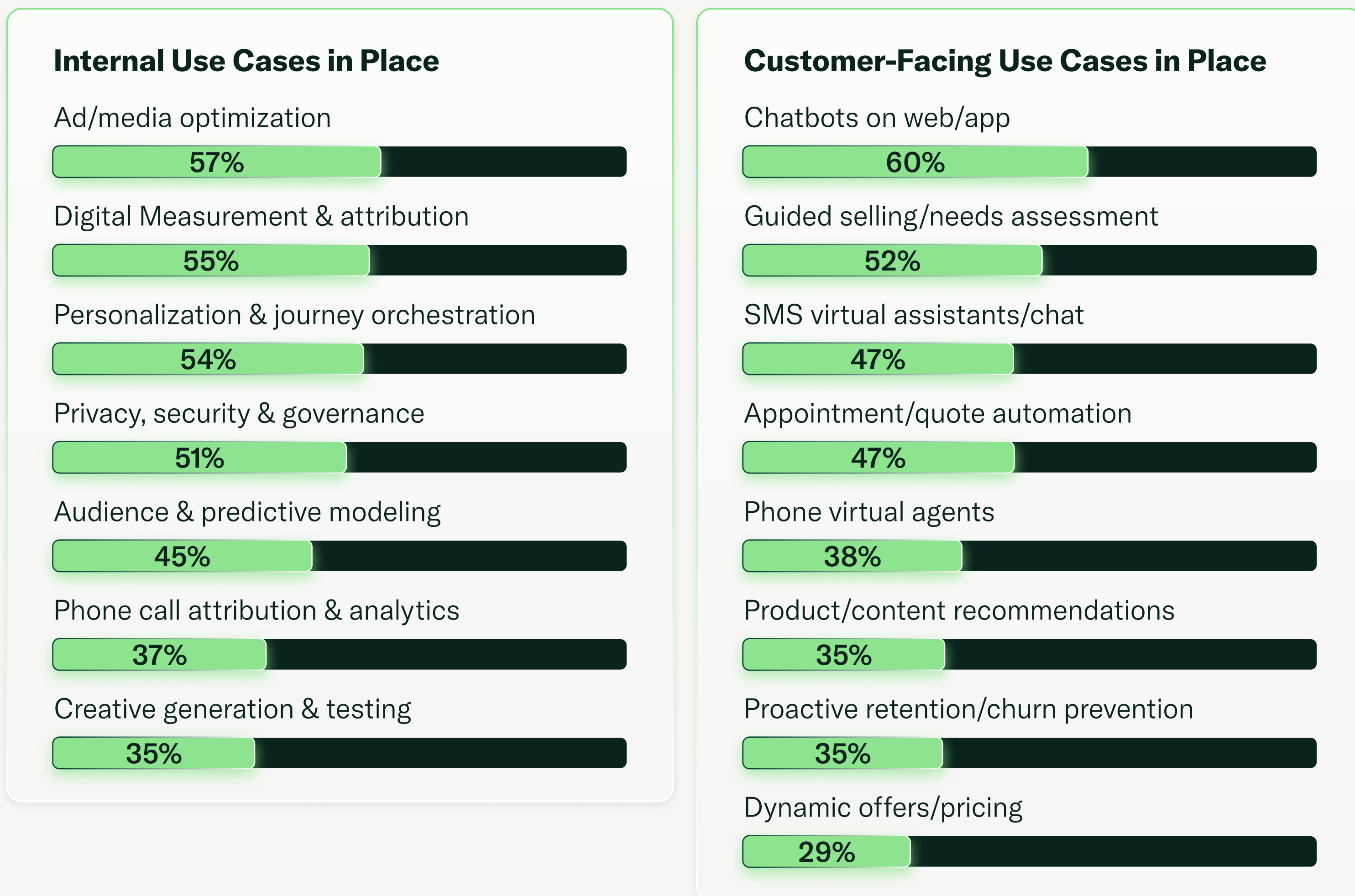


Strategy and ambition are meaningless without effective execution. The ultimate value of AI is determined not by the size of the investment but by how deeply it is embedded into daily workflows and, most importantly, how quickly insights can be transformed into action. This section identifies key areas of AI application and reveals critical latency gaps that are leaking value from the marketing funnel.



Current AI Deployment Across The Buying Journey

AI is being applied across a wide range of marketing functions, with a relatively even split between internal process optimization and direct customer-facing interactions.

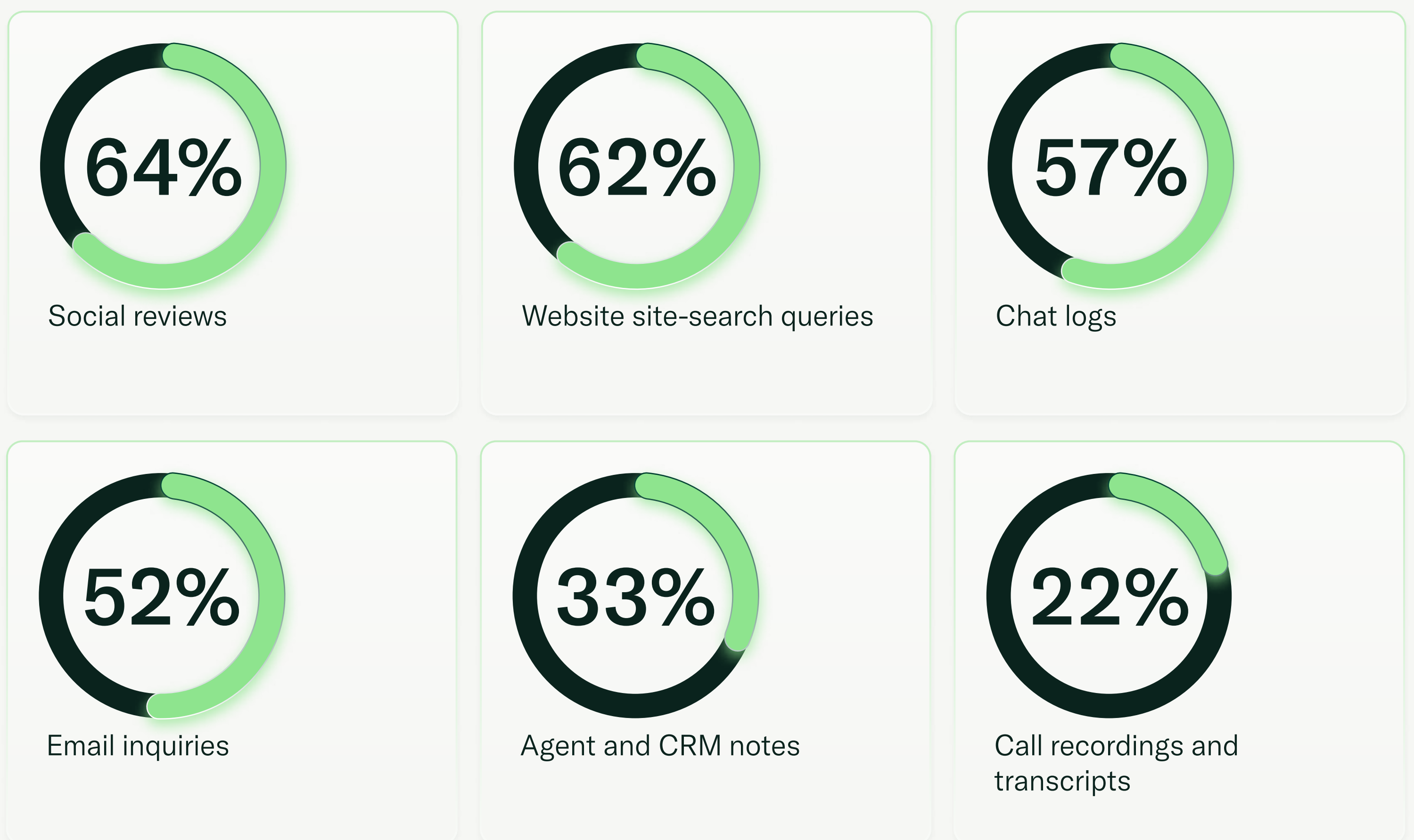


Notably, telecommunications organizations show significantly higher adoption of chatbots on web/app (60% vs. 47% overall) and guided selling/needs assessment (52% vs. 42% overall), while showing lower adoption of creative generation & testing (35% vs. 46% overall) and dynamic offers/pricing (29% vs. 46% overall).

The Unstructured Data Opportunity Gap

While telecommunications marketers are actively using AI to mine various data sources, a significant opportunity is being underutilized. Organizations are highly likely to analyze text-based sources, such as social reviews (64%), website search queries (62%), and chat logs (57%), but are notably less likely to mine the rich, high-intent data contained within call recordings and transcripts. Surprisingly, the telecom industry is significantly less likely to mine call transcripts than the overall sample (22% vs 37%).

Unstructured data sources telecommunications marketers are actively mining with AI

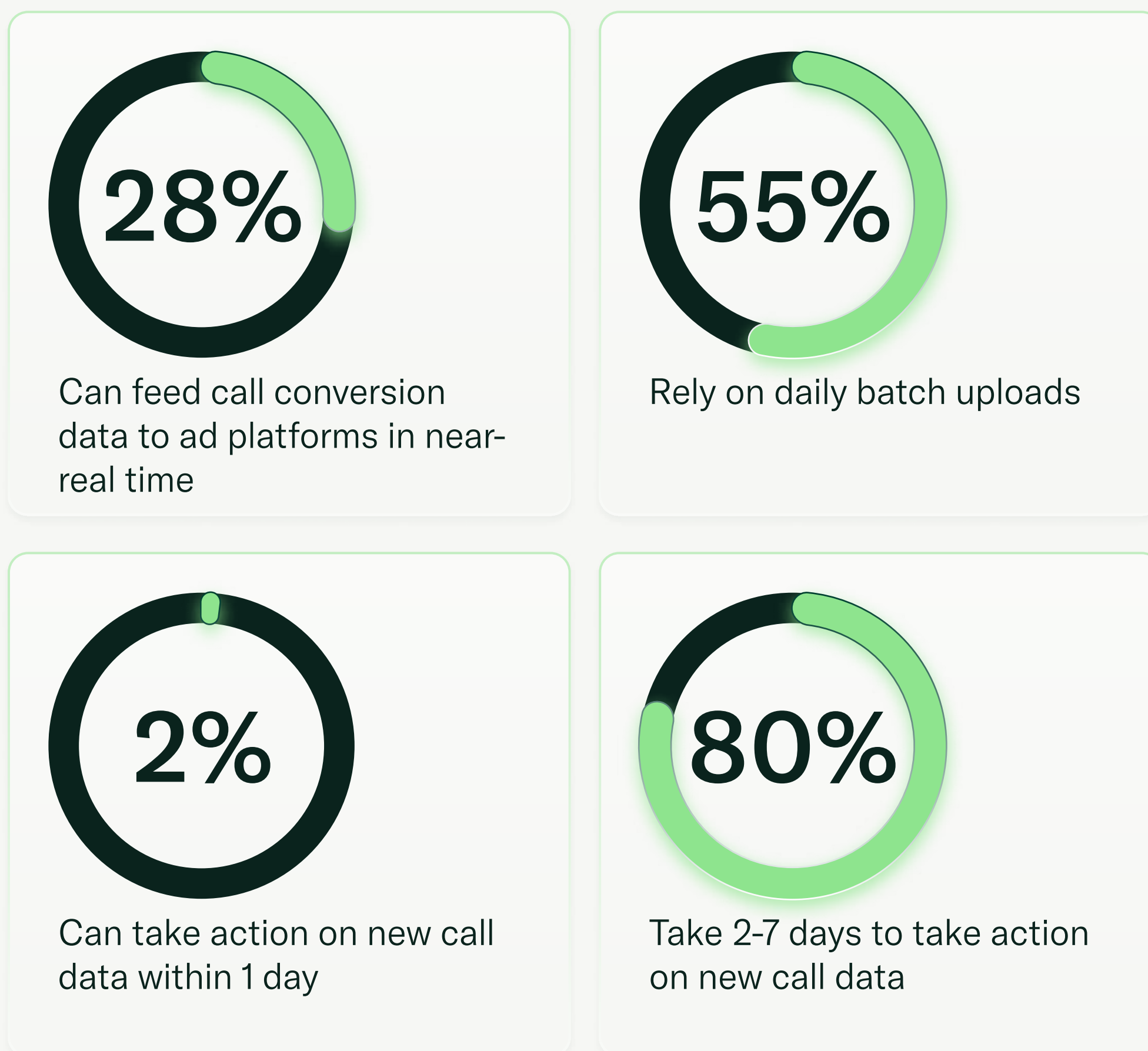


This gap is a strategic vulnerability, as calls contain the unfiltered voice of the customer—their explicit intent, objections, and sentiment—data that is orders of magnitude richer than clicks or form fills. Buying journey optimization is only as strong as the weakest link, and this lack of first-party data creates a critical gap in understanding qualification, objections, conversion drivers, and revenue attribution.

The Critical Latency Problem

Perhaps the most significant operational failure identified is the "insight-to-action" gap—a major leak in the marketing funnel. The data reveals a costly delay between when an insight is discovered and when it can be acted upon. When optimization signals are delayed, budget is spent on yesterday's picture of demand.

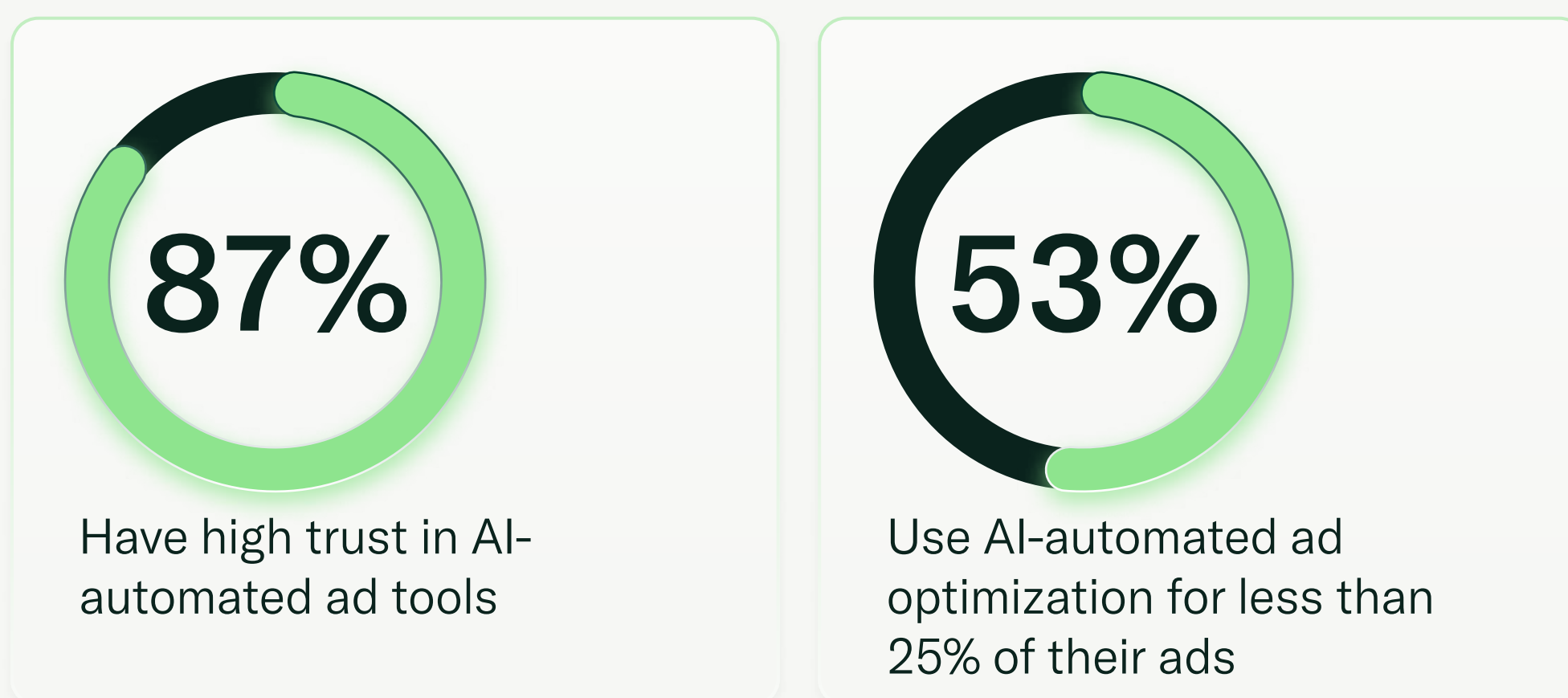
We found that only 28% of telecom organizations can feed call conversion data to ad platforms in near real-time, which is essential for agile optimization. A majority (55%) still rely on slower daily batch uploads.



Critically, the latency is severe for insights from unstructured data. A mere 2% of telecom marketers can turn a new insight from a source like a phone conversation into a live campaign change on the same day. The vast majority—80%—take between two and seven days, a delay that severely blunts the competitive advantage AI is meant to provide.

AI Advertising Optimization Confidence Is High, Utilization Could Be Higher

Digital advertising platforms, such as Google and Meta, utilize powerful AI systems that can automate the management of ad campaigns. While telecommunications marketers trust this technology, a gap exists between their confidence in the tools and their actual usage of them.



The data reveals a core tension: 87% of telecommunications marketers have high or full trust in AI-automated ad tools like Google Performance Max, Smart Bidding, and Meta Advantage+. Yet many use them to optimize a limited portion of their total ad spend.

This gap suggests telecommunications marketers are comfortable ceding tactical execution to AI but are somewhat reluctant to surrender strategic control.

What Marketers Need To Increase AI Ad Automation

Telecommunications marketers want more AI oversight—a glass box, not a black box. So, what's holding them back from handing over more control? Telecommunications marketers say they need more transparency and better guardrails to feel comfortable scaling up.

This operational friction leads directly to the final, and most critical, disconnect: the chasm between how telecommunications marketers believe their AI is performing and how customers are actually experiencing it.



The Great Disconnect Of Marketer Perception And Consumer Reality

The gap between internal perception and external reality represents one of the single greatest risks in any business strategy, and AI is no exception. The survey data, when contrasted with consumer reporting, quantifies a profound disconnect between how telecommunications marketers view their AI-driven customer interactions and how consumers actually experience them.

This blind spot has the potential to erode brand trust and undermine the very customer experience that AI is intended to improve.



Perception Vs. Actual Consumer Sentiment

Telecommunications marketers are overwhelmingly confident that their AI-powered tools are creating positive customer experiences. Consumers, however, report a starkly different reality.

Telecommunications Marketers

85%

believe consumer sentiment toward AI interactions is "very/somewhat positive"

The consumer reality

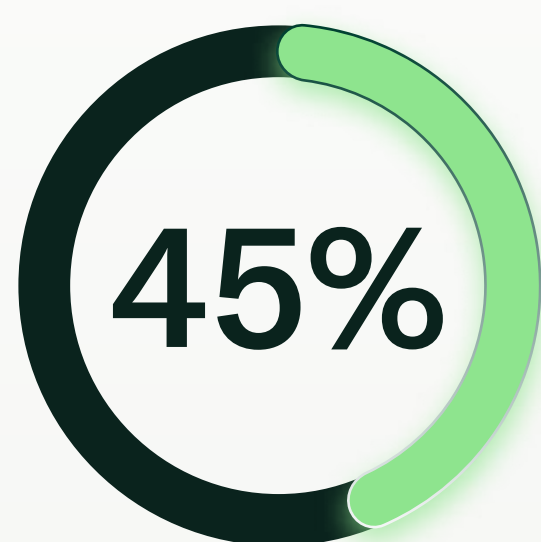
Only 47%

of consumers felt positively about their interactions with a brand's AI*

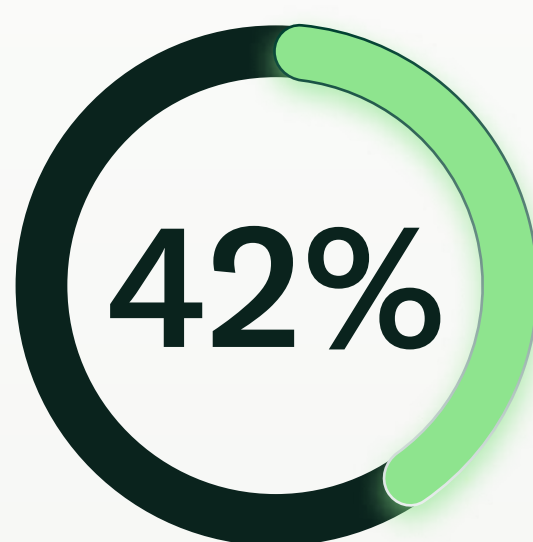
*Source: [Telecom Buyer Experience Report, Invoca, 2025](#)

Misalignment On High-Stakes Interactions

This disconnect narrows when we look at how AI should be utilized for various customer needs. Telecommunications marketers believe consumers are ready to trust AI with significant decisions at about the same level as consumer confidence.



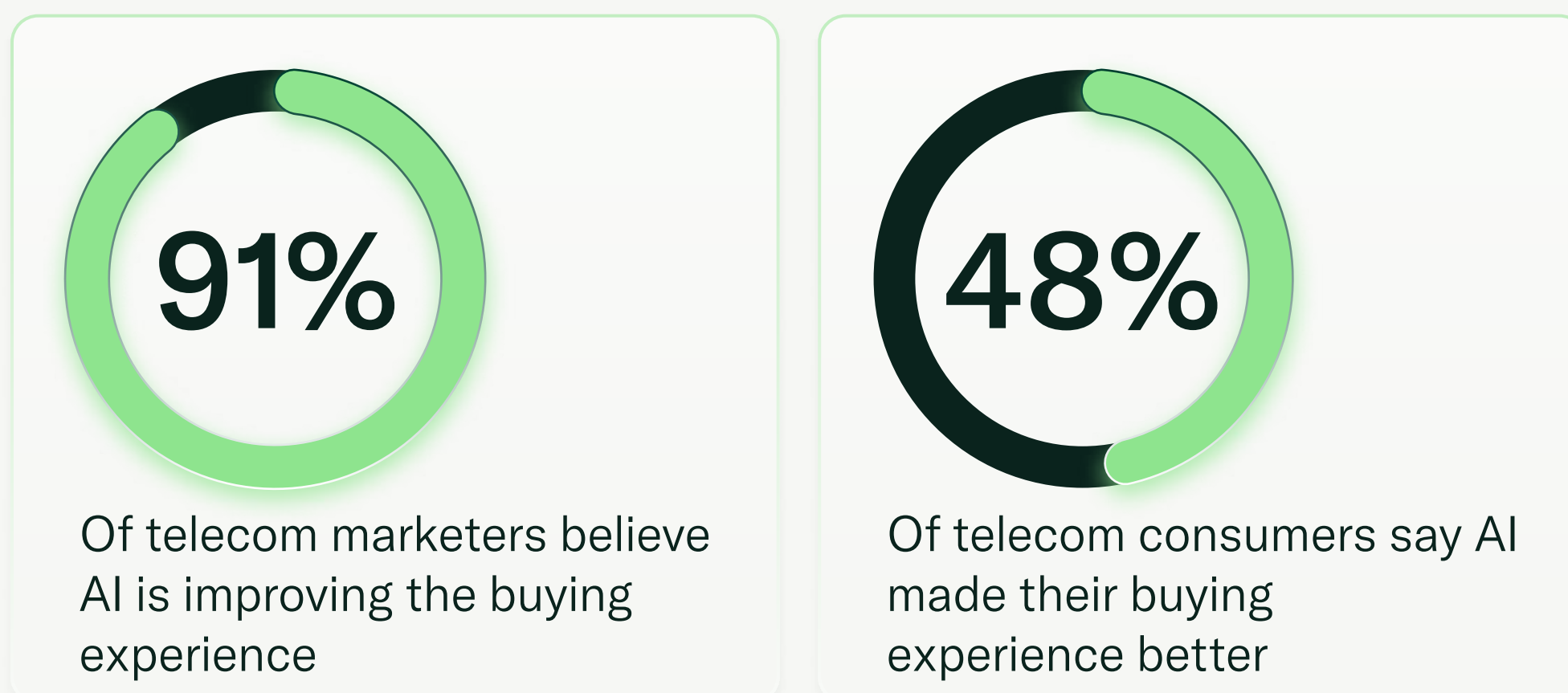
Of telecom marketers think consumers prefer AI for complex tasks



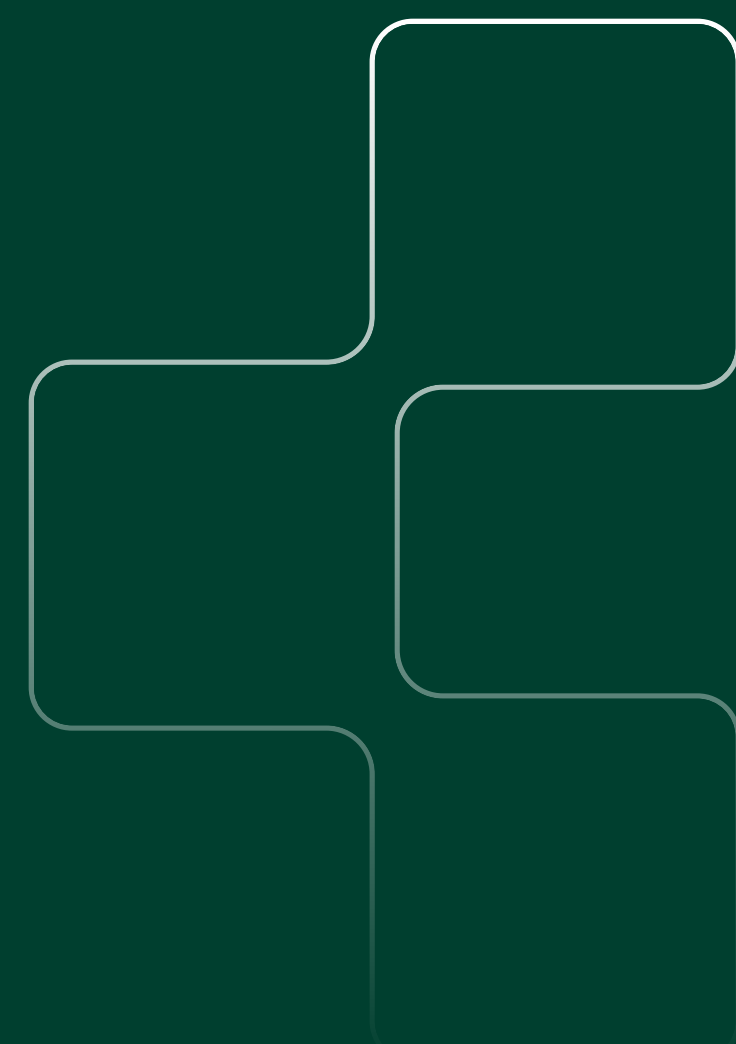
Of telecom consumers are confident that AI can resolve complex issues

The Bottom-Line Impact On Customer Experience

The ultimate measure of success is whether AI is enhancing the buyer journey. On this point, the disconnect is most severe. A remarkable 91% of telecommunications marketers believe AI is improving the customer experience across the buying journey. This optimistic internal assessment is directly contradicted by consumer feedback, which indicates that only 48% of consumers report that AI has actually improved their buying experience.

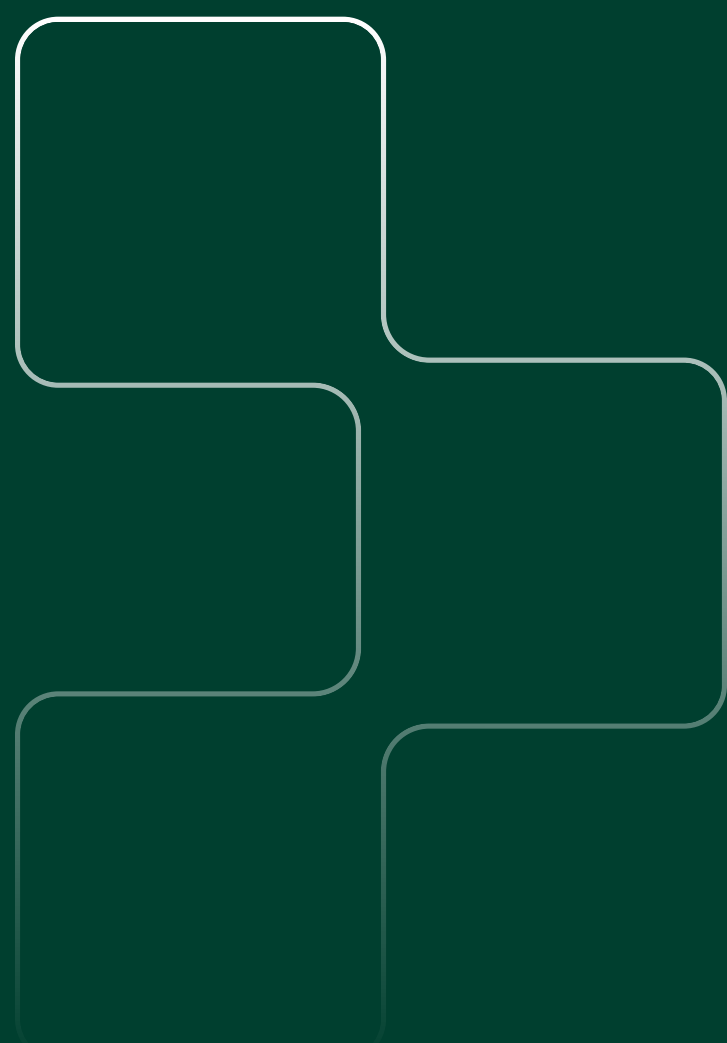


This chasm between belief and reality is not a minor discrepancy; it is a fundamental strategic threat that requires immediate and decisive action from leadership.



Strategic Imperatives For Telecommunications Marketing Leadership

The findings of this report reveal a market in a state of productive turmoil. It is an industry fueled by immense optimism and urgency, but simultaneously facing strategic challenges, operational friction, and a dangerous disconnect from its customers. To navigate this landscape successfully, telecommunications marketing leaders must move beyond ambition and address these challenges directly. The following imperatives provide a clear and actionable framework for closing these critical gaps.



Mandate An Objective Reality Check On Competitive Standing

While telecommunications organizations show confidence in their current AI pace, leadership must challenge internal assumptions and commission a formal, data-driven competitive intelligence review. Grounding AI strategy in the reality of the market—not in collective optimism—is the first step toward building a sustainable advantage. Failing to do so means navigating the market with a potentially distorted map.

Bridge The Investment-Ambition Gap

There is a fundamental misalignment between the strategic importance placed on AI and the budgets allocated to it. If 80% of telecommunications leaders believe AI is essential to hitting 2026 targets, then allocation models where 88% of firms spend less than 20% of their martech budget on AI (significantly higher than the 68% overall) are unsustainable. Budgets must be critically re-evaluated and realigned to match the strategic imperatives the organization has identified, or ambitions must be scaled back to reflect reality. The telecommunications sector's particularly acute funding barriers must be addressed.

Prioritize The "Insight-To-Action" Workflow

Insight latency is a primary inhibitor of AI's value. The multi-day delay between data discovery and campaign activation neutralizes the speed advantage AI should provide. Leadership must prioritize investments in the technology and processes required to close this gap. A specific focus should be placed on integrating high-value, first-party unstructured conversational data—currently mined by only 22% of telecom organizations—and enabling near real-time optimization, a capability just 28% possess today. First-party conversation data must be part of the control system for AI. Combine digital interactions, conversation data, and confirmed conversions to ground models in real outcomes, in real time.

Ground AI Strategy In Validated Customer Feedback

The profound disconnect between marketer perception and consumer reality is the most significant threat to brand trust revealed in this study. Leadership must immediately institute closed-loop mechanisms for validating every AI initiative against actual customer sentiment and preference data. With 91% of telecommunications marketers believing AI is improving the customer experience while only 48% of consumers agree, relying on internal assumptions is no longer acceptable when the stakes are this high. Without this validation loop, the organization is not innovating; it is merely guessing at the customer's expense.



Charting A Course For AI-Driven Growth

The findings from this research present a clear verdict on the state of telecommunications marketing. The landscape is defined by a potent combination of competitive urgency, confident deployment, and a willingness to move quickly on AI. This mindset has created significant disconnects between internal beliefs about AI's success and the market's actual experience—gaps rooted in operational challenges surrounding first-party data activation and a substantial perception gap with consumers.

The true AI winners will not only be the fastest adopters, but the most astute. They will be the organizations that ground their AI strategy not in ambition alone, but in operational excellence and an unwavering commitment to using data to understand and enhance the actual, not perceived, buyer experience. The capital and brand equity lost by today's overconfident sprinters will become the market share acquired by the more deliberate, customer-obsessed organizations of tomorrow. Telecommunications marketers are well-positioned to be among those winners, provided they address the critical gap between their confidence and consumer reality.

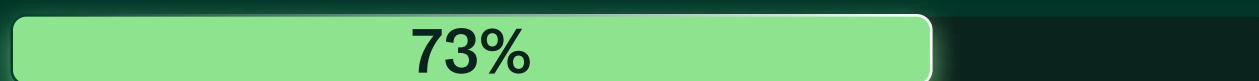
Report Methodology

100 full-time telecommunications marketing professionals with manager or higher titles at U.S. telecommunications companies with 100 or more employees were surveyed. Results may not total to 100% due to rounding and multiple selection options. The field survey was performed by Sago Online Research.

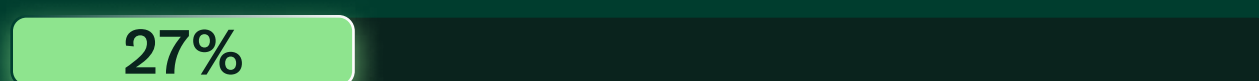
Demographics

Gender

Male

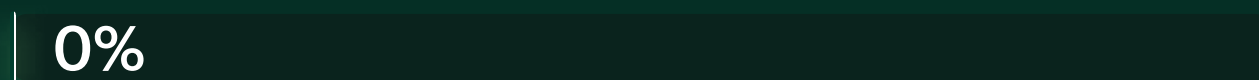


Female

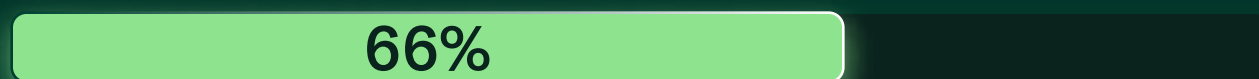


Number of Employees

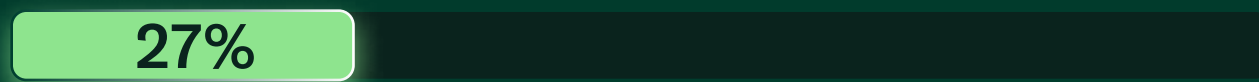
100 - 499



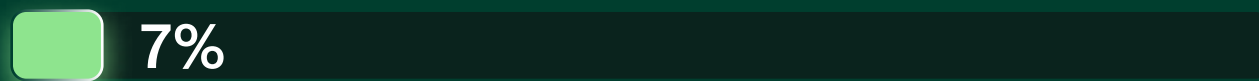
500 - 999



1,000 - 4,999

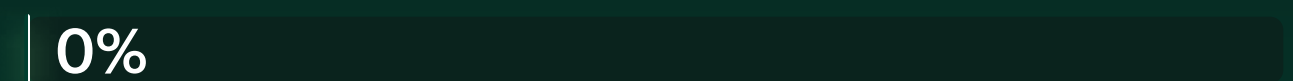


5,000 or more

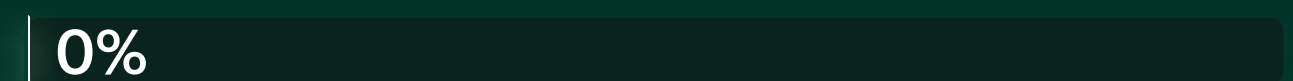


Title

Manager



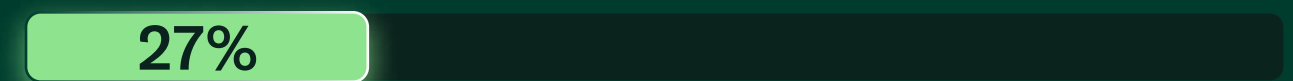
Director



Vice President



President



C-Level

