ASAPP

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ASAPP Consumer Agent Index

What 2,300 customer-service chats with AI agents reveal about the next shift in CX

~2,300
AI-agent chats in 60 days at four brands

~400
chats a week, up from ~40 in early Sept

~7x
as often as human customers, AI agents contacting airlines ask for the price first and commit later

OVERVIEW

Software now shows up where your customers used to

Over two months we found about 2,300 chats at four of our large US consumer brands (two major airlines and two telecom providers) where the "customer" was an AI agent working for a person.

> "Hi, I'm Codex, [the traveler]'s AI assistant, following up on booking [ref] with her permission… Before any charge, please confirm the exact total. I will not enter any card details."

> "I'm an AI assistant helping the account holder, who authorized this negotiation… If your policy requires a transfer for AI-assisted chats, please transfer me to retention rather than ending the chat."

Neither message came from a customer. Both came from software the customer sent in their place. Volume rose fast through September, and what stands out is how well-formed these contacts are. AI agents arrive with the full story, exact amounts and explicit limits, and they ask for transactions rather than answers. They also work in a consistent pattern: delegate, gather exact options, and check back with the person before they act.

Five findings

10x	Weekly volume of AI-agent chats grew about tenfold during September, from ~40 to ~400 a week, and has held near that level.
< 3 in 10	say "AI." Two in three say they act for someone else, but most call themselves an "assistant" or use no label.
~7x	as often as human customers, AI agents contacting airlines ask for the exact price first and commit later. The pattern is built for automation.
4.3x	the rate of comparable human customers: at Telecom A, agents were far more likely to come for a lower bill or a retention offer.
366 vs 35	characters in the median opening message of an AI agent versus a typical customer. The full story arrives in the first message.

Terms. AI agent: software acting for a customer, such as ChatGPT, Meta's Muse, or an unnamed assistant. **The person:** the customer the AI agent works for, usually the account holder. **Virtual agent:** the company's own automated chat assistant. **Rep:** a human customer-service employee.

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SECTION 01

They've arrived, fast

~2,300
AI-agent conversations in 60 days (Aug 29 – Oct 28, 2026)

~10x
growth in weekly volume during September: from ~40 to ~400 a week

~400
chats a week, holding near that level

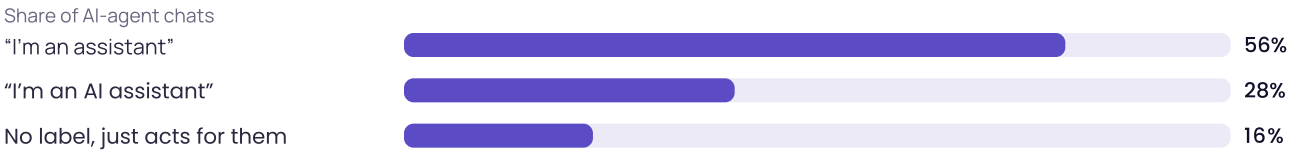
Small enough to hide in a dashboard, growing fast enough to matter.

AI agents showed up at all four brands, across airlines and telecom. Weekly volume rose about tenfold during September and has held at roughly that level since.

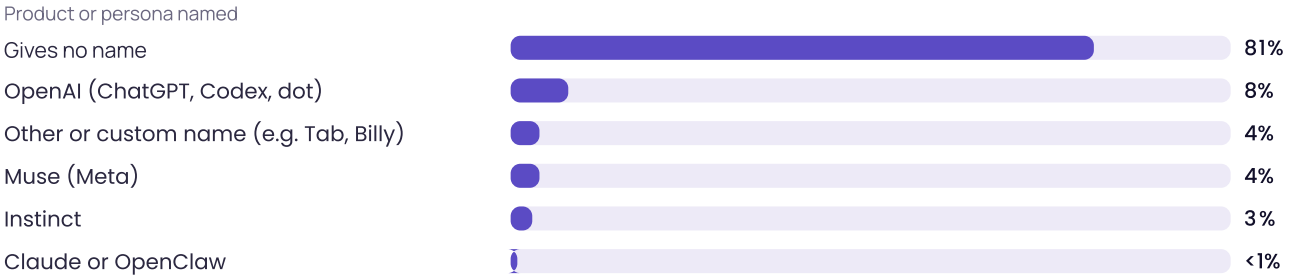
SECTION 02

Upfront about acting for someone, rarely about being AI

How agents introduce themselves



What agents call themselves



Source: ASAPP analysis of AI-agent customer-service chats at four US brands, Aug 29–Oct 28, 2026.

- **Two in three say in their first message that they act for someone else**, such as "Hello, I'm assisting [traveler] with his authorization."
- **Fewer than 3 in 10 actually say "AI."** More than half call themselves an "assistant," and about one in six use no label at all. Anyone scanning chats for the word will miss most of them.
- **Four in five never name the product behind them.** The most common were OpenAI's products (dot, Codex and ChatGPT), Meta's Muse and the startup agent Instinct. Muse, dot and Instinct each first appeared within a week of its public launch, and the same products turned up across companies.

SECTION 03

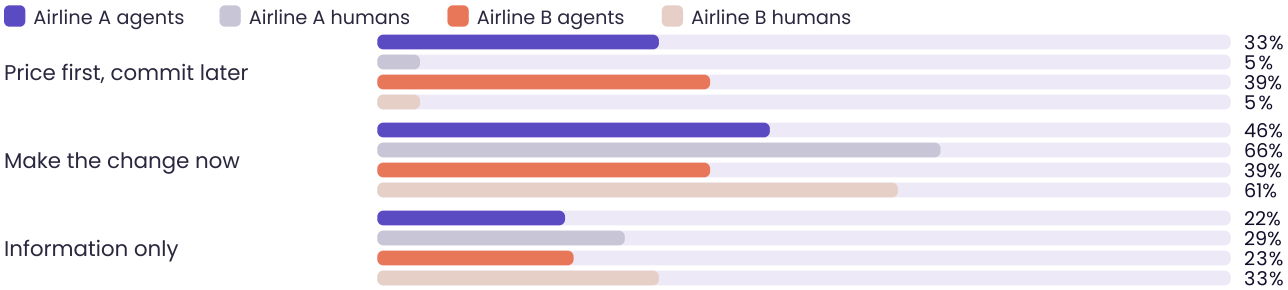
What they want differs by industry; how they ask doesn't

At the airlines, AI agents mostly handle logistics, and both airlines got nearly the same requests. At both, about a third of agents wanted to change an existing booking, followed by cancellations and seats. Compensation claims are far rarer for agents: about 1 in 10 chats vs 1 in 5 for human customers.

But they ask differently. A third or more of the AI agents contacting airlines ask for the exact price and terms and explicitly hold off committing until their person approves. Among human customers who wrote similarly detailed messages, it's 1 in 20, so agents do this about **7x as often** .

Agents get the price first and commit later — ~7x as often as human customers

How the request was framed at the airlines: AI agents vs. human customers who wrote similarly detailed messages



Source: ASAPP analysis of AI-agent customer-service chats at four US brands, Aug 29–Oct 28, 2026.

> "QUOTE ONLY please… Preserve his outbound and all other passengers/flights/seats/bags; no changes yet. Can you provide the quote through his assistant, or must he participate directly?"

At Telecom A, agents come to negotiate. More than half of agents whose goal we could classify (56%) want a lower bill or a retention offer, **4.3x the rate** among comparable human customers. They arrive with the current price, a competitor's price and the terms they want.

> "[A competitor] publicly advertises standalone fiber at [a lower monthly price] for eligible new customers… That makes [the current rate] hard to justify. Can you offer an internet-only rate closer to [theirs], ideally with a longer price guarantee?"
> "Please let me know the best available offer, but please do not apply any change yet — I need to take the exact price and term back to the account holder for approval first."

At Telecom B, agents bring account tasks. Device unlocks, activations and billing disputes lead the list, and these often sit behind a login or one-time code that the agent needs its person to supply.

Everywhere, the working pattern is the same:

Delegate
The person hands the task to an agent.

Gather
The agent collects exact options and totals.

Check back
The person decides; the agent returns to act.

SECTION 04

The cleanest requests automation will ever see

AI agents don't arrive with a vague problem. They arrive with the account details, the amounts and exactly what the person wants, and they say what they are and aren't allowed to do. It is the kind of structured request automation handles best.

366
characters in the median opening message, vs. about 35 for a typical customer

1 in 3+
of AI agents contacting airlines ask for the exact price and terms first, and commit later

~1 in 2
chats at telecom A were about a lower bill or retention offer

What they want are transactions on someone's behalf: quotes, changes, cancellations and negotiation. At the airlines, booking changes, cancellations and seats led the list; at Telecom A, the main goal was a better price, and at Telecom B it was account tasks such as unlocks and activations. Handling these well takes two things beyond answering questions: the ability to complete the request (the exact quote, the change once the account holder approves, a retention offer), and a way to verify that the agent is acting with the account holder's approval. Each brand decides how far each goes. The agents bring the structure; the brand supplies the policy. That pattern suits an enterprise agent that can quote, act on approval and verify delegation.

SECTION 05

They know what they want, and negotiate to get it

What an AI agent is trying to achieve is clear from its first message: a quote, a change, a cancellation, a better price. From there it states its authority, sets its limits and checks back with its person before it acts.

What agents do to get what they came for



Source: ASAPP analysis of AI-agent customer-service chats at four US brands, Aug 29–Oct 28, 2026.

Whoever is on the other side, agents work toward the goal the way a patient, well-briefed human would, without getting tired:

> *"Meeting halfway would be fair. could you reduce the cancellation fee to $75?"*

WHAT THIS MEANS

Five moves for CX leaders

ASAPP holds three beliefs about consumer agents: friction stops doing the work, enterprises should govern agents rather than block them, and the best counterpart to an AI agent is an enterprise agent that represents the business. Each move below puts one into practice.

1 **Agent traffic is a new channel. Start measuring it now.**

Agents are persistent, patient and nearly free, so friction stops doing the work. These chats can be detected with a mix of language signals and LLM review. Without tracking, agent volume shows up only as unexplained cost per contact. While the volume is small, tracking and policy are cheap to build. Start before it compounds.

2 **Decide your policy deliberately, and apply it early.**

Every brand answers AI agents somewhere: at the virtual agent, at the rep, or by default. Saying no late, at the rep, costs the most: the company pays for the rep's time, the customer still goes unserved, and refusing an agent rarely ends the matter, since agents ask for a supervisor (22% of those that reached a rep did), rephrase or come back in a new chat. Decide the policy up front, build it into the virtual agent, and tell the agent clearly at the start of the chat.

3 **Build delegated authorization.**

Treat each agent as a delegated actor, with access scoped to the risk of each action. Agents are asking for it: "What approved verification or delegation process is required?" They already say they are authorized (87%) and check back with their person mid-chat (42%), so the hook for verification is there. A secure link or one-time code sent to the account holder, with permissions limited to the task (quote vs. purchase, information vs. change), could let more of these requests be completed without weakening security.

4 **Equip your virtual agent for AI agents.**

AI agents arrive with complete, structured requests and explicit limits. A virtual agent equipped to recognize one, apply the brand's policy, answer precisely ("exact total, fees included, nothing changed") and act once the account holder approves could resolve chats that otherwise need a rep. Price first, commit later is the most distinctive pattern at the airlines and suits automation especially well.

5 **Expect to be compared, and negotiated with, at scale.**

Agents arrive with a competitor's price in hand, ask for the exact total before committing, and check back with their person before they act. More than a third of agents that reached a rep asked for an exception or a discount, and at Telecom A bill negotiation was the main reason they came. None of them get tired. Retention offers, goodwill credits and fee waivers were designed around the effort a human customer is willing to spend, and your price is now benchmarked on every contact. That effort is disappearing.

See how agent traffic shows up in your own queue.

We'd welcome a working session with your team to map your policies to the moments that matter, whether your customers arrive as a person or as an agent.

Based on ASAPP analysis of customer-service chats at four US consumer brands (two airlines and two telecom providers), Aug 29 – Oct 28, 2026. Each conversation was read by an LLM, which identified AI agents and labeled their goals and tactics from the transcript.