helpshift

The 2022 Digital Support Benchmark Report

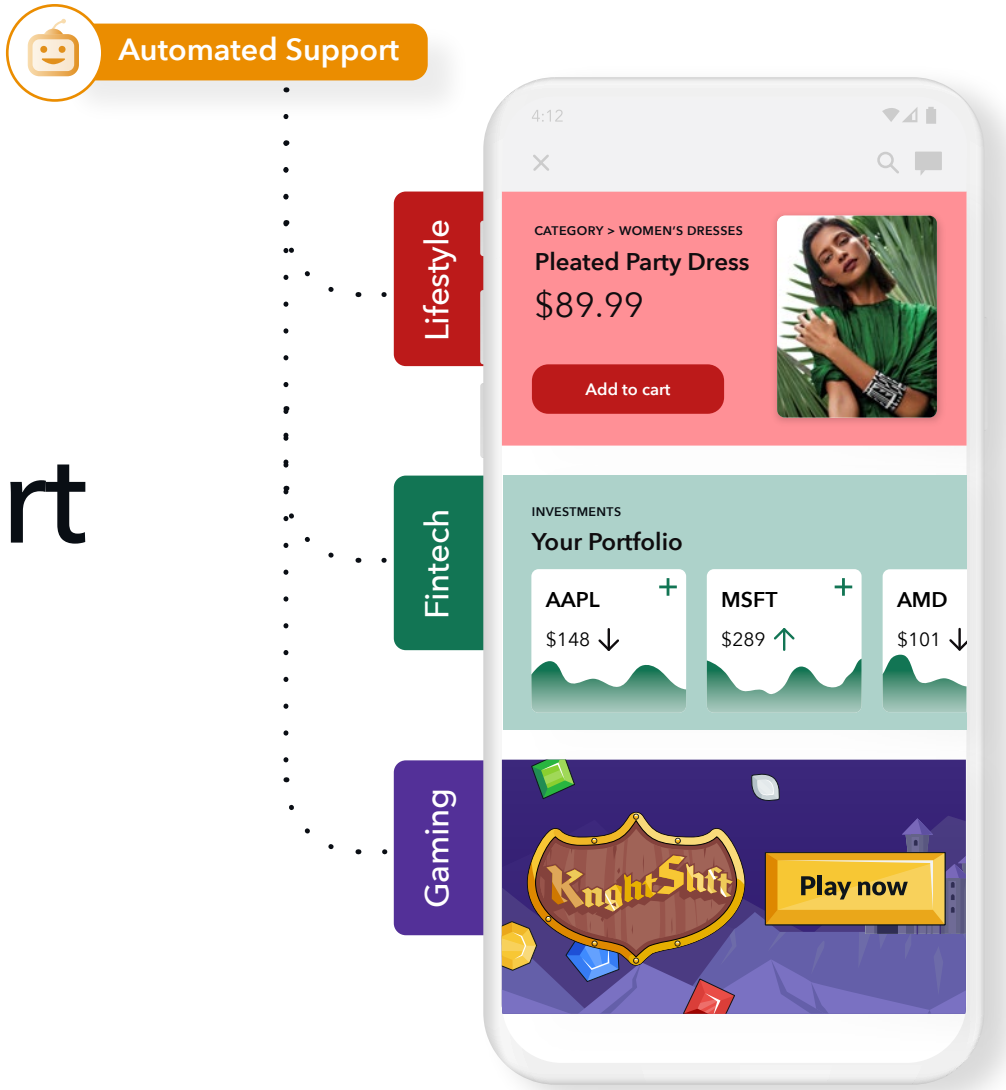


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Dear Reader,

Welcome to the 2022 Digital Support Benchmark Report.

This report covers trends seen across Helpshift's customers in the following verticals: gaming, fintech, and lifestyle (including retail, hospitality, health and fitness, entertainment, and more). It analyzes how these companies have been leveraging conversational AI and customer support automation in a post-lockdown world and amidst concerns of a global recession in an effort to meet the increasing demands of consumer expectations while maintaining costs.

Last year's benchmark report focused on the gaming category. Consumers spent more time at home due to the lockdown and gaming and mobile entertainment soared quicker than anyone could have foreseen. The need for automation was rising as it took time for many companies to integrate the full time WFH business model. Despite the world opening back up again and ticket volumes stabilizing, we have not seen a decrease in the use of automation across our gaming customers. In parallel, there has been a substantial increase in issue volume across fintech companies prompting them to accelerate the use of AI and automation with upwards of 90% of their tickets being handled by a bot at some point throughout the customer support journey that Helpshift provides. While the lifestyle category has not yet caught up to that of fintech in terms of issue volume, there has still been an uptick in the use of automation by these brands amidst staffing challenge and a need to revise their support operations.

Throughout the report, you'll also note that our modern customer support journey – which starts with a guided, in-app self-service experience, followed by an intent-driven workflow, supported by bots working behind the scenes 24/7 – continues to reduce workload for agents, produces faster response and resolution times, and yields a higher CSAT, ultimately driving a better consumer experience and a greater overall impact to a brand's bottom line.

Faced with today's challenges and pressures to optimize tools and costs, automation is no longer just a trend. Rather, it's a transformational shift that many companies are now prioritizing. We hope you find the insights in this report useful and we look forward to assisting you in implementing Helpshift's modern customer support journey so that you can immediately begin using our intent-driven AI and automation tools to meet your goals.

> "This has been a substantial increase in issue volume across fintech companies prompting them to accelerate the use of AI and automation with upwards of 90% of their tickets being handled by a bot at some point..."

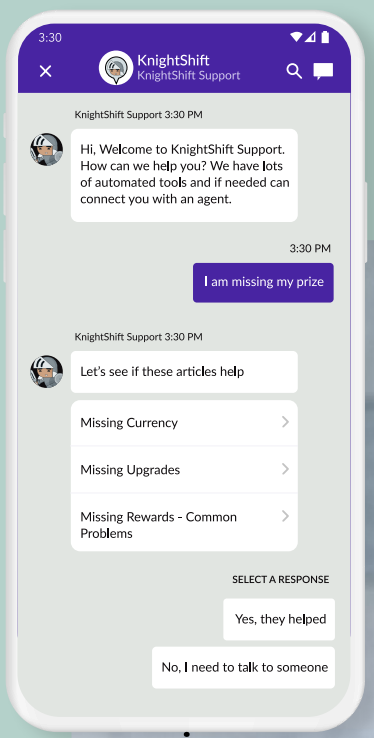
Introduction

The customer support industry is always changing because our consumers are always changing. Therefore, it is necessary to keep adapting to the constant flux of today's world, following a pandemic and amidst concerns of a global recession. It may not be possible to turn time backwards or predict the future, however studying trends helps inform strategic decisions. By gathering user feedback and data usage and reviewing our customers' results alongside them, Helpshift continues to craft a product that meets evolving business needs. This understanding drives the flywheel of product innovation and allows us to tailor-fit the needs of this "new" market. Let's take a look at the trends uncovered this past year across the customer care industry that have been improving the way brands provide customer support even in uncertain times.



The State of App Usage

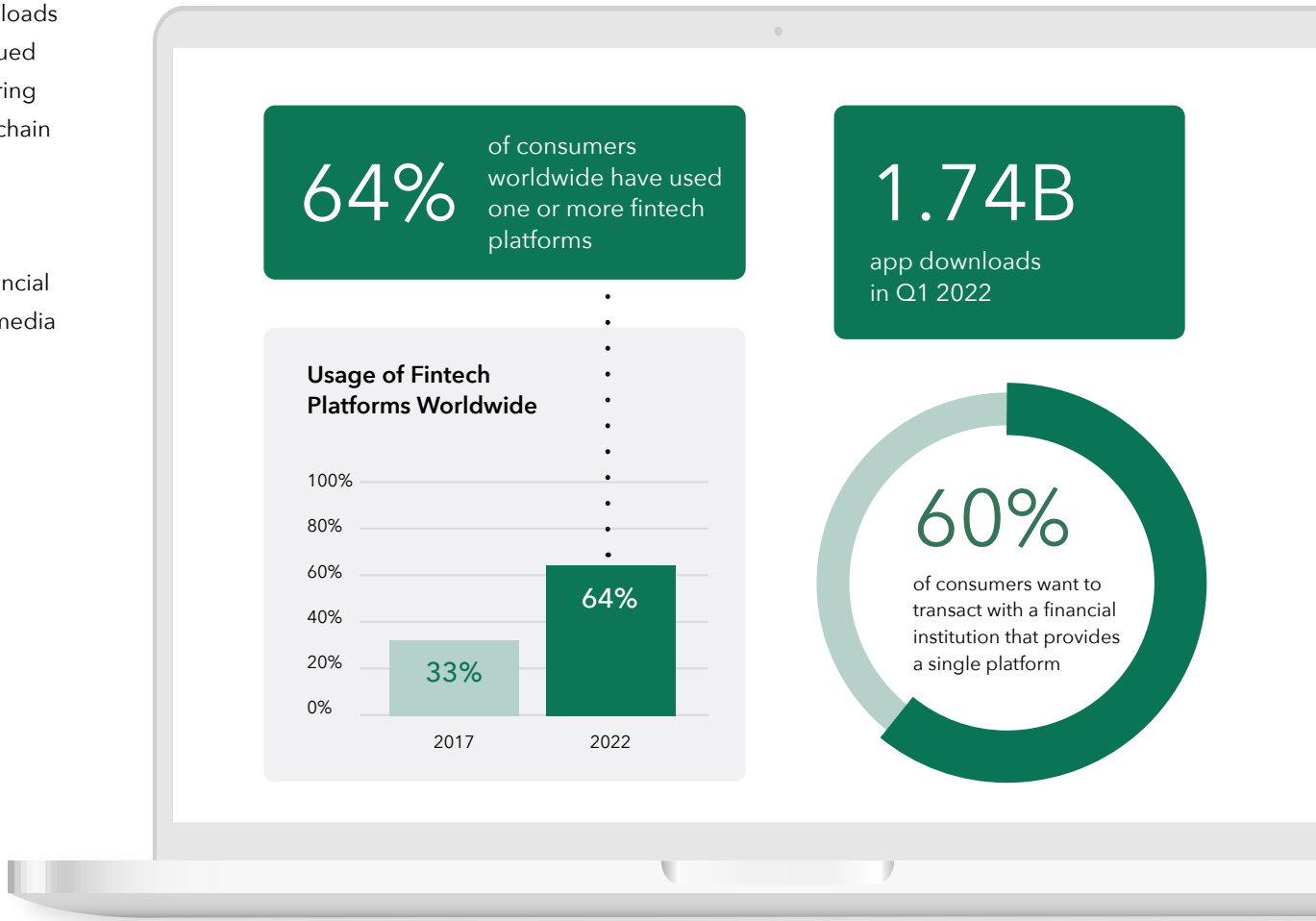
The following download numbers and usage statistics set the tone for the 2022 customer service landscape across the fintech, gaming, and lifestyle app categories.



↑ 48% increase in automated resolution speed

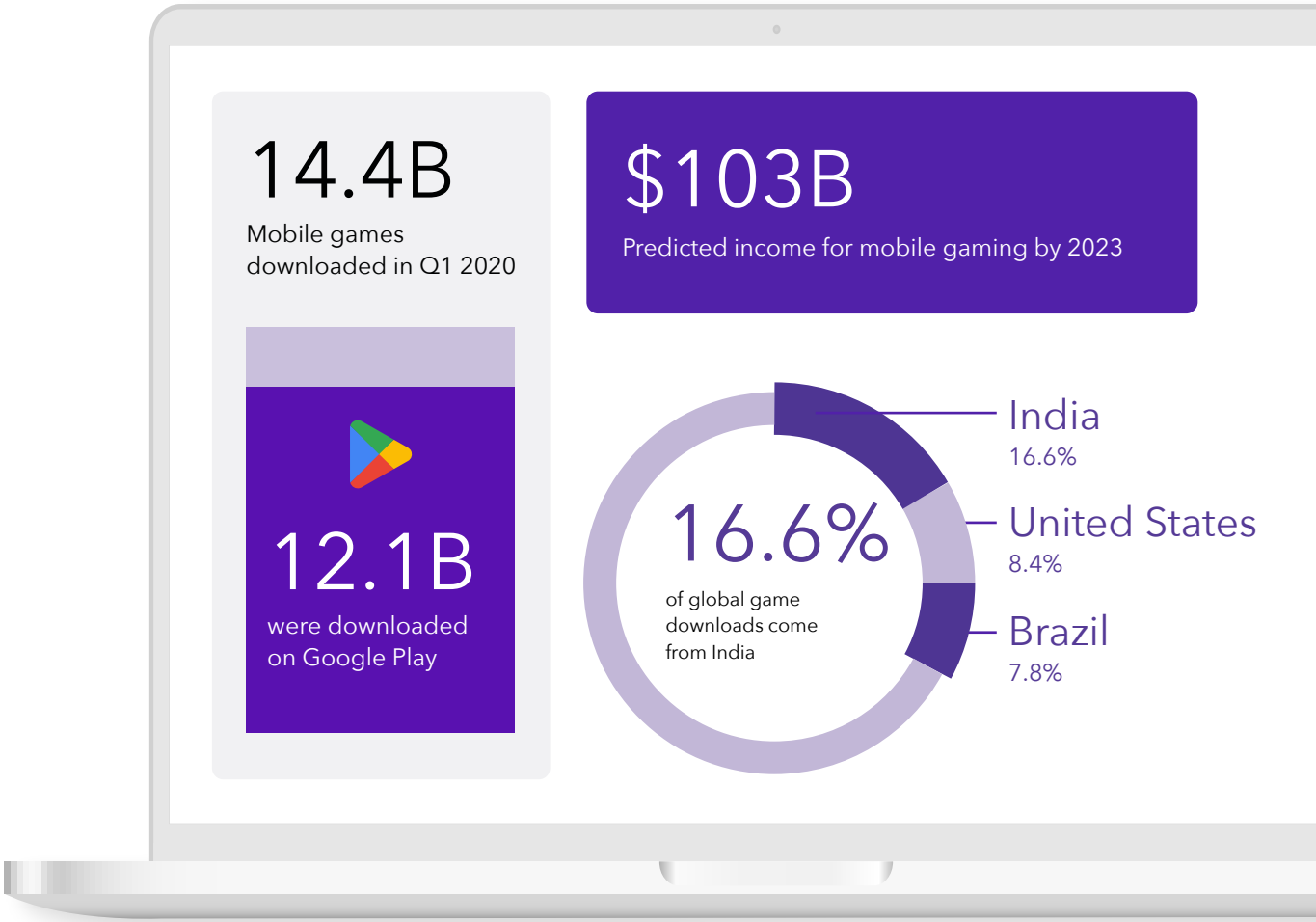
Fintech

According to Sensor Tower, cumulative fintech app downloads reached 1.74B in Q1 2022. Fintech app usage has continued to increase even after its initial pickup in engagement during the height of the pandemic. With advancements in blockchain technology crypto apps have seen a particularly notable increase. Regarding usage, 64% of consumers worldwide have used one or more fintech platforms, contrasting just 33% in 2017. 60% of consumers want to transact with financial institutions that provide a single platform, such as social media or mobile banking apps.



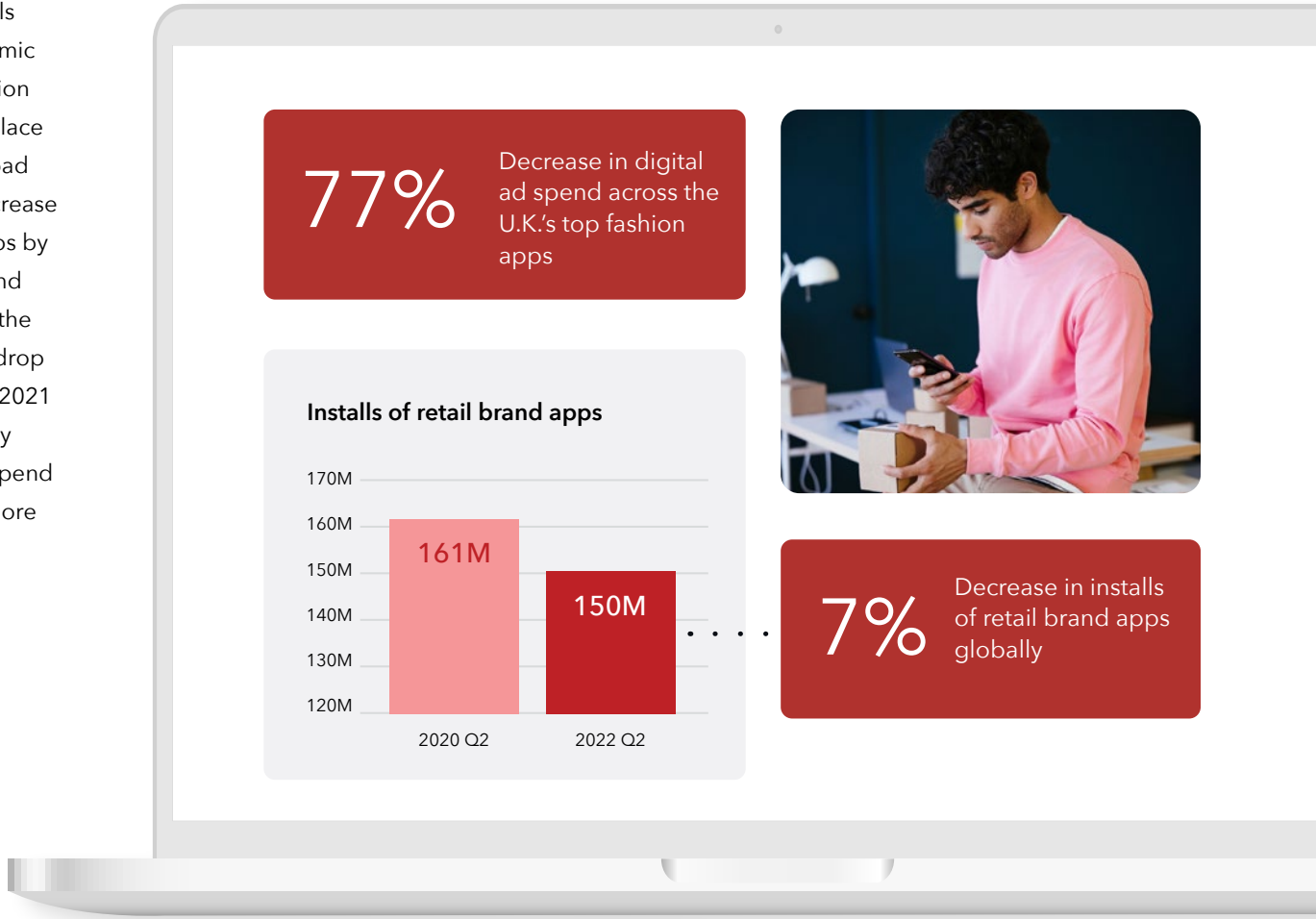
Gaming

A study by Statista revealed that mobile games reached 14.4 billion app store downloads globally in Q1 2022. India was the top market for mobile game downloads, accounting for 16.6% of all global downloads, 12.1 billion of which were on Google Play. The United States was second at 8.4%, and Brazil closed out in third, making up 7.8% of global mobile game downloads. Inferencing 2022 data, experts predict that the mobile gaming category will bring in approximately $103 billion in 2023. That will be $26 billion more than what it was in 2020.



Lifestyle

Retail brand apps endured a 7% decrease in global installs from Q2 2020 to Q2 2022 as lockdowns lifted and economic concerns rose. Sensor Tower data revealed that competition within the retail category has heated up, causing marketplace apps like Amazon and AliExpress to see a drop in download share from 55% in 2019 to 24% H1 2022. Despite the decrease in overall share, Amazon remains one of the top retail apps by MAU. Meanwhile, the download shares of fashion apps and supermarket apps have risen since 2020. Perhaps one of the most noteworthy shifts within the retail category was the drop in U.K. fashion brands' digital ad spend from $78M in H1 2021 to just $18M in H1 2022, a 77% decrease, fueled in part by Apple's IDFA changes. This data suggests that, with less spend dedicated to digital advertising, brands may be relying more heavily on their apps to engage with consumers.



Method

The data displayed in the benchmark section of this report was collected from the analysis of real Helpshift customers using the following tools offered on the Helpshift platform.

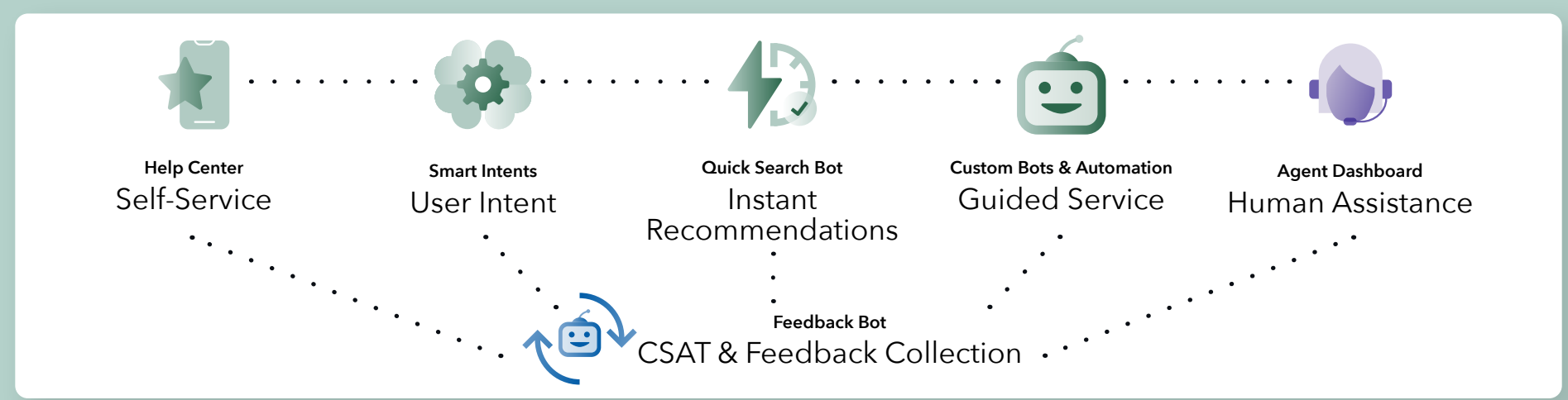


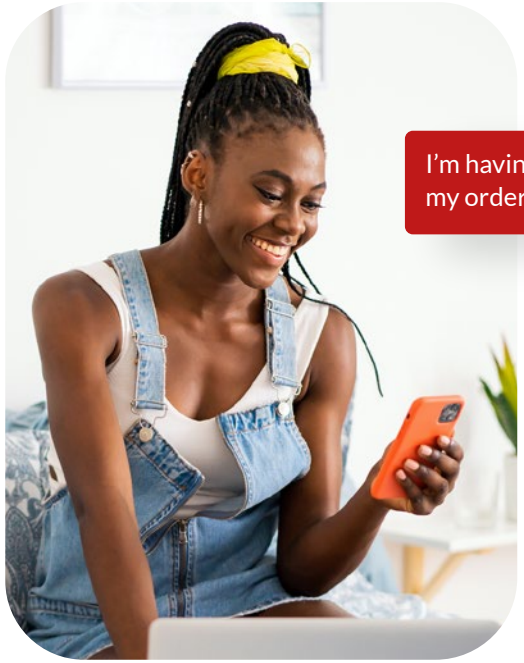
Helpshift's Modern Support Journey

One of the main goals of Helpshift is to modernize the customer support journey. Through the use of automation and conversational AI tools, Helpshift aims to provide a personalized path to a friction-free resolution. Most often, this can be done without requiring the heavy use and cost of a live agent, saving the customer time and the company money.

Understanding The User Support Journey & Trying These Tools Together

According to our data, the majority of app users want a fast and simple solution to their problem, and more often than not, they prefer to be able to solve these problems quickly themselves rather than starting a support ticket. Most Helpshift customers' self-help experiences incorporate our in-app help center. These help centers are where users can conveniently find quick answers to common questions and problems, providing users with one of the most effective first levels of support available. If the help center does not provide the solution to the user's problem, Helpshift's AI-driven Smart Intents is capable of recognizing a diverse subset of text to reference the user's appropriate intent and offer a guided support journey. With Smart Intents, brands can choose to offer a selection menu based on common user problems as well as contextual information about the authenticated user. By identifying user intent up-front, custom bots and automations can more effectively solve the user's issue. If the problem is complex, the issue can be routed to a live agent to resolve the issue. Below is a simplified walkthrough of Helpshift's modern support journey.





3:32 PM: Problem occurs, customer needs help

I'm having issues tracking my order.

The customer still has some questions, and taps the Contact Us button to reach out to support

Let's see if these articles help

Track Order

Return Order

Lost/Missing Order

Help Center
Self Service

- Customer searches for their problem on Help Center
- In-line search results, popular articles and other features assist in locating the right knowledge base articles

Smart Intent
User Intent

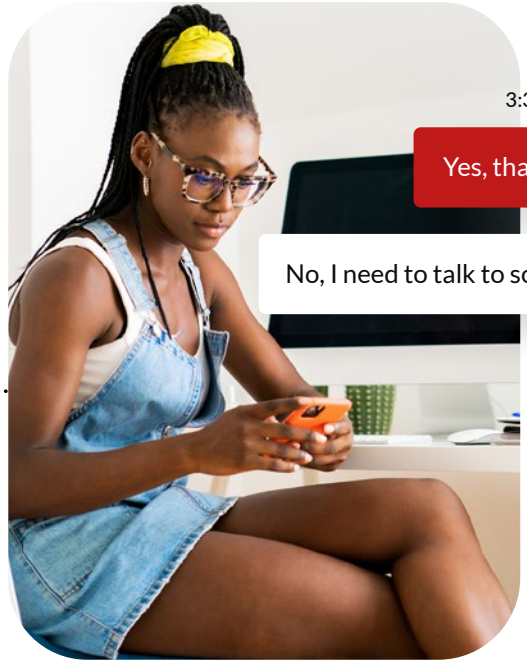
Identify the customer's intent for support

- The customer can select from a list of preset Level 1 and Level 2 categories
- The customer can also type their problem and the AI will suggest intents that are most relevant to their problem

Quick Search Bot
Instant Recommendations

Identify the customer's intent for support

- The top 3 most relevant FAQs are shown to the customer
- FAQs can be read right within the support chat



3:33 PM: Andrea

Yes, that helped

No, I need to talk to someone

3:33 PM: Customer Service Bot

Hmm... Okay, let me check the routing number for your package

3:34 PM: Customer Service Bot

Please hold tight for one sec, we are matching you to a support agent that will be able to help you further...

Automations

Segmentation & Routing

- Created issues pass through Automations executing all processes that the issue qualifies for
- Identifiers such as tags, update custom fields, private notes can be added in the process
- In the end, Automations will route issues to specific Queues or Custom Bots

Custom Bots

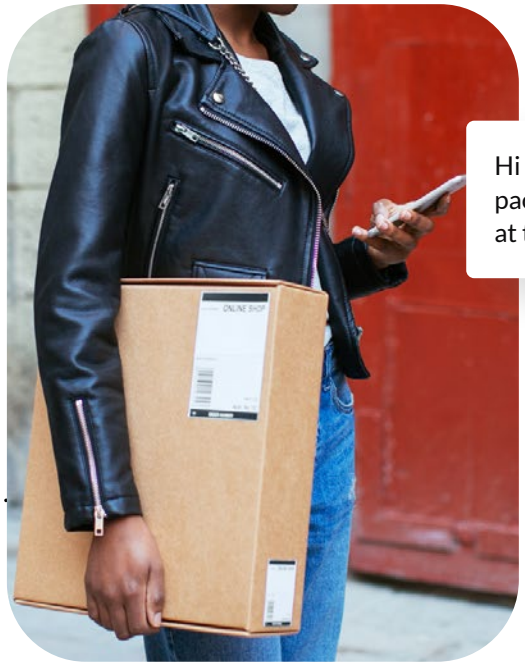
Automated Solutions

- Issues get routed to the Custom Bot that is purpose built to handle those specific problem types
- Custom Bots may attempt to fully resolve, or triage and gather necessary information to hand over to the agent, allowing the agent to resolve faster

Queues

Prioritized Buckets Waiting for Agents

- Agents, Automations & Custom Bots can assign issues to Queues
- Auto-Assignment ensures that issues are assigned in order of their listed priority
- Ensures the most urgent problems are being assigned first



3:35 PM: Andrea

I'm having issues with returning my order.

Rachel - Support Agent 3:35 PM

Hi Andrea, we are here to help. Let me check some of your information to better help you.

Rachel - Support Agent 3:37 PM

Hi Andrea, it appears your package was just delivered at this address.

3:40 PM: Andrea

It just arrived! Thank you!

How would you rate the customer service you received today?

5 - Very Helpful

4 - Helpful

3 - Average

2 - Poor

5 - Very Poor

Agent Dashboard

Human Assistance

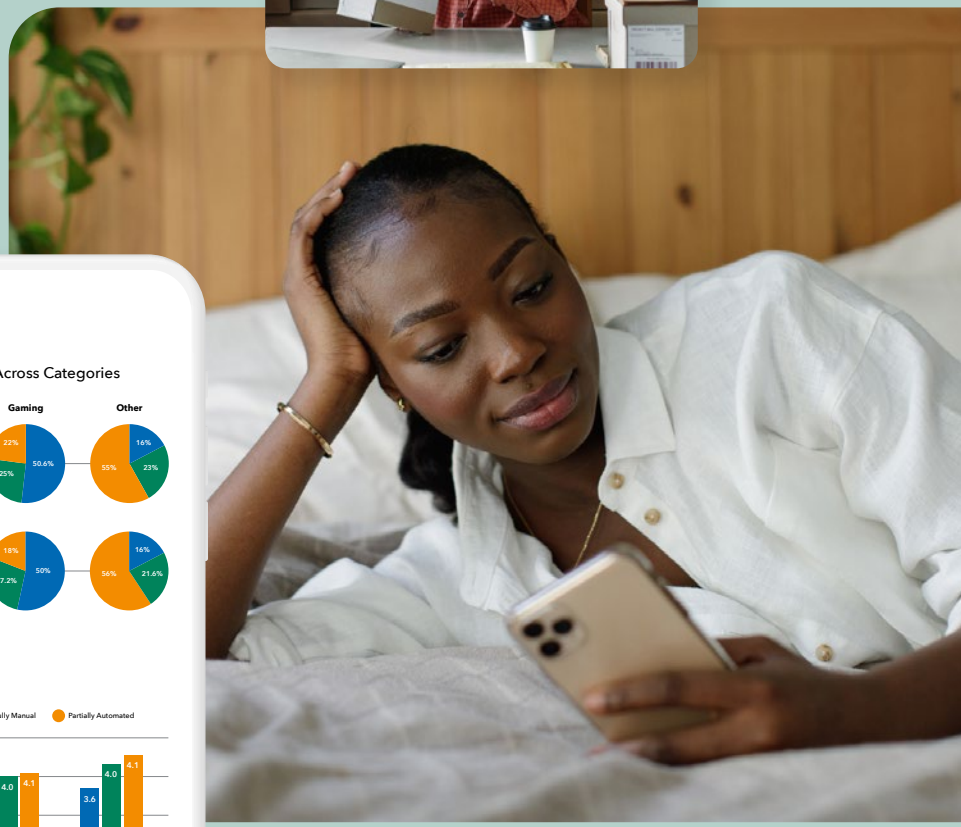
- Finally, an agent receives an issue that will have all the necessary information they need to proceed with a resolution

Feedback

- Final step can be arrived at from any point in the Modern Support Journey where an issue becomes resolved
- Standard 1-5 CSAT survey following in-app or web chat conversations
- Feedback Bots can also be used to design unique / segmented surveys with as much flexibility as Custom Bots

User Support Benchmark Metrics







Automation Trends Across Gaming, Fintech, and Lifestyle

During the pandemic, the adoption of support automation across gaming apps skyrocketed. Many companies started with the most common problem types and simple processes that can be done by a bot, and built from there. This was not just a temporary occurence during the pandemic. Fig. 1 reveals that issues handled by automation have remained at a high rate within the gaming category, with approximately 50% of issues handled fully by automation, roughly 25% handled by partial automation, and about 25% of issues handled manually.

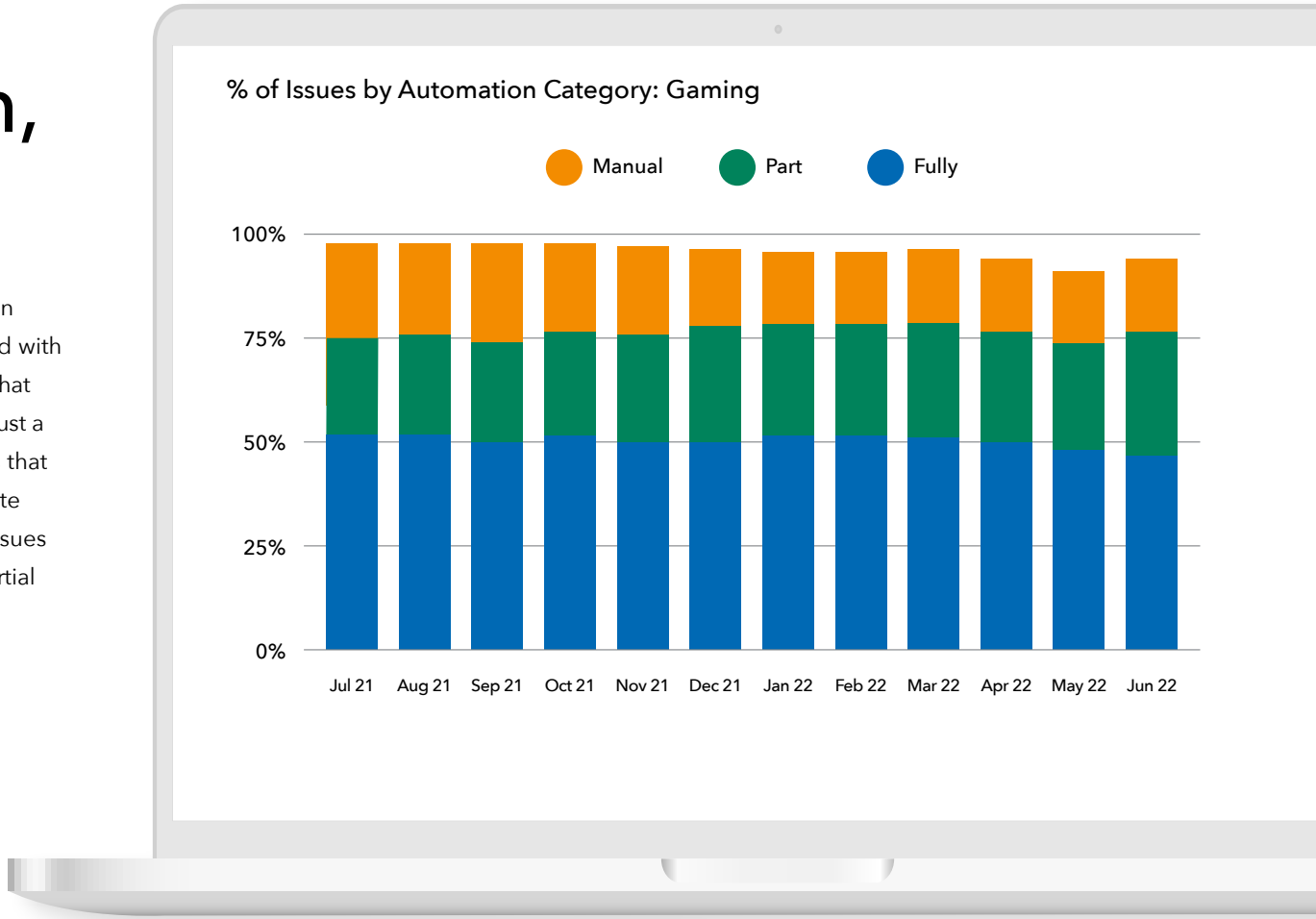


Fig. 1. Issues by Automation Category (Gaming; In-App)
Analyzing Fully Automated, Fully Manual and Partially Automated Issues Over Time

The data shows that the lifestyle category leverages less automation than the gaming and fintech categories. More than 50% of lifestyle category issues were handled manually (Fig. 3). We expect to see this pick up next year as more brands get onboard with digital transformation, navigate staffing challenges, and focus on cost optimization amidst a slower economy.

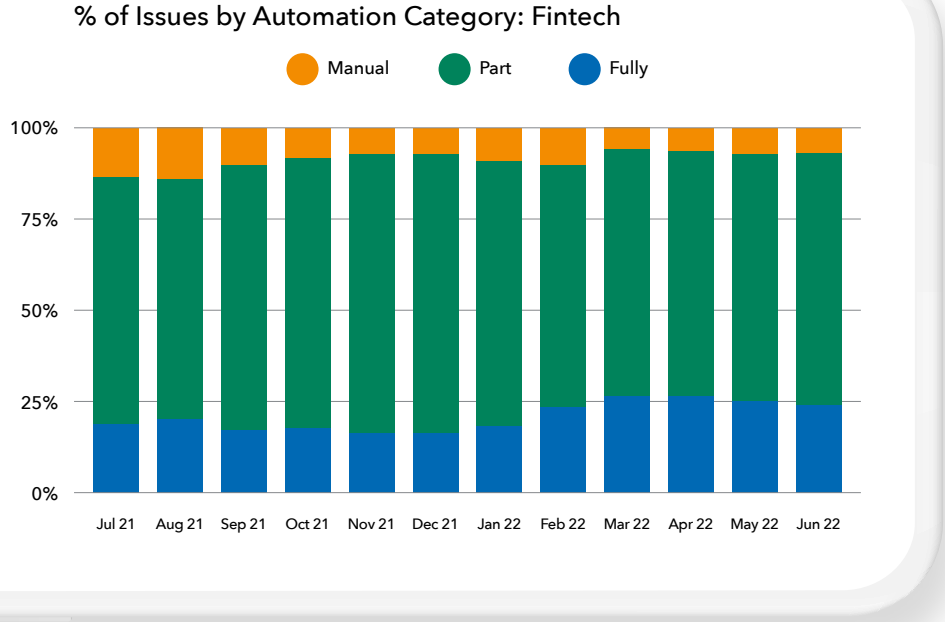


Fig. 2. Issues by Automation Category (Fintech; In-App)

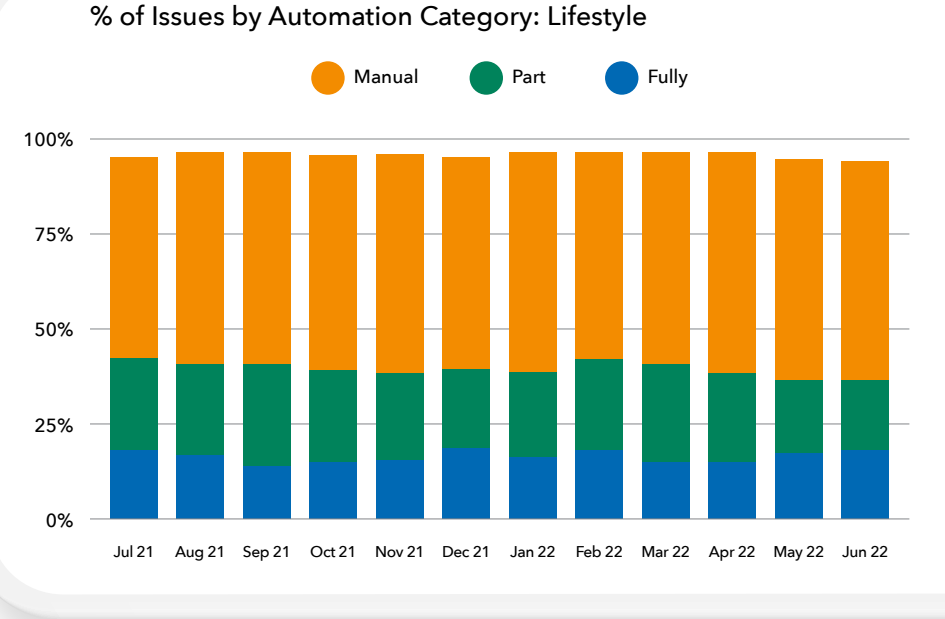


Fig. 3. Issues by Automation category (Lifestyle; In-App)

Comparing Automation Trends Year Over Year

In 2022, automation was leveraged differently across the fintech, gaming, and lifestyle categories (see Fig 4). The gaming category, now a veteran in automation, saw over 50% of issues fully handled by automation and 25% handled by partial automation. This means that 75% of gaming issues are being solved with some sort of automation.

The fintech category has made some huge strides in the past year with the usage of automation. More than 70% of their issues are being partially handled by automation and more than 15% of them are being fully handled by automation. This means roughly **85%** of their issues are being solved with some level of automation!

Lastly, with a little over 35% of the lifestyle category's issues currently being resolved through full or partial automation, the lifestyle category is indeed adopting automation within their support operations, albeit at a slower pace than the other categories featured. Based on the trends, lifestyle categories may soon follow suit in the levels of automation adoption seen by the other categories featured in this report.

In line with the automation trends seen across the featured categories, there has also been a decrease in the number of manually handled issues as companies have begun shifting how they leverage their human resources within the modern support journey. **As a result, agent productivity and focus has increased, allowing for delivery of higher quality responses and, thus, improved CSAT rates as shown in Fig. 5.**

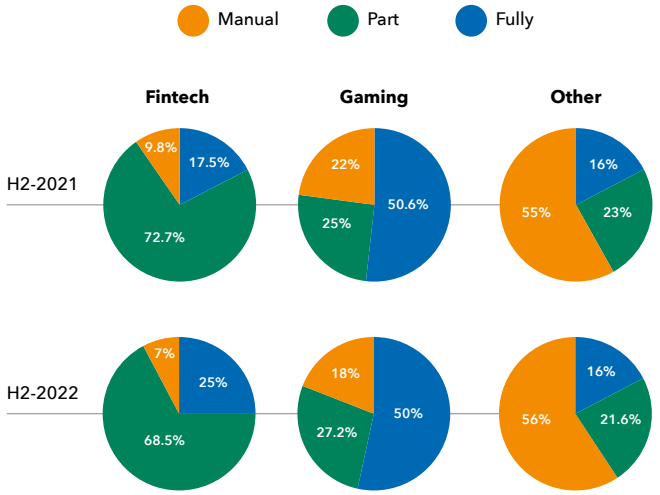


Fig. 4. Automation Utilization Across Categories

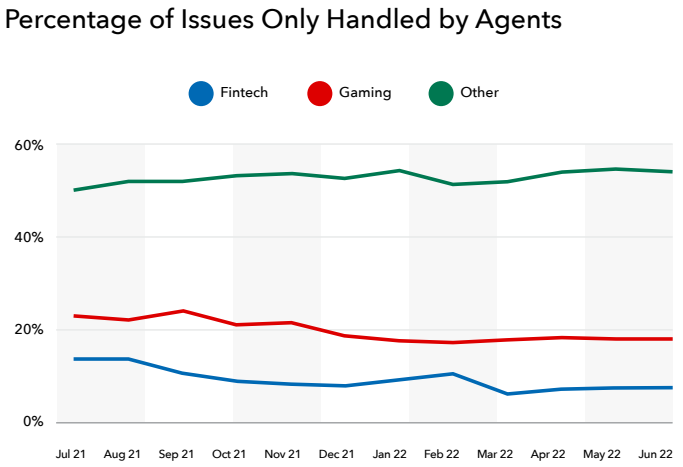


Fig. 5. Percentage of Issues Handled Manually

CSAT Across Automation Categories: Fully Automated, Fully Manual, and Partially Automated

The data reveals that users are more willing to provide feedback when a survey appears right in the app immediately after an issue has been resolved. In-app surveys are less disruptive, providing users with a quick and seamless experience. Across all app categories, the brands that serve a CSAT prompt directly after issue resolution received the highest response rates yielding completion rates north of 30%. On the other hand, email ranks as the least favorable channel for collecting customer sentiment and is the least effective, with only 16% of users responding to a CSAT survey. Convenience encourages survey completion.

As depicted by Fig. 6, partial automation yielded a higher average CSAT than fully automated and manually handled issues. Based on the data, the average user prefers a support experience in which automation is used at the start of the issue resolution process with agents when necessary. The agent is equipped with contextual data about the user and their device, allowing them to resolve the issue effectively and quickly. Additionally, to minimize friction and impact to resolution time, the transition from bot to agent should be as seamless as possible.

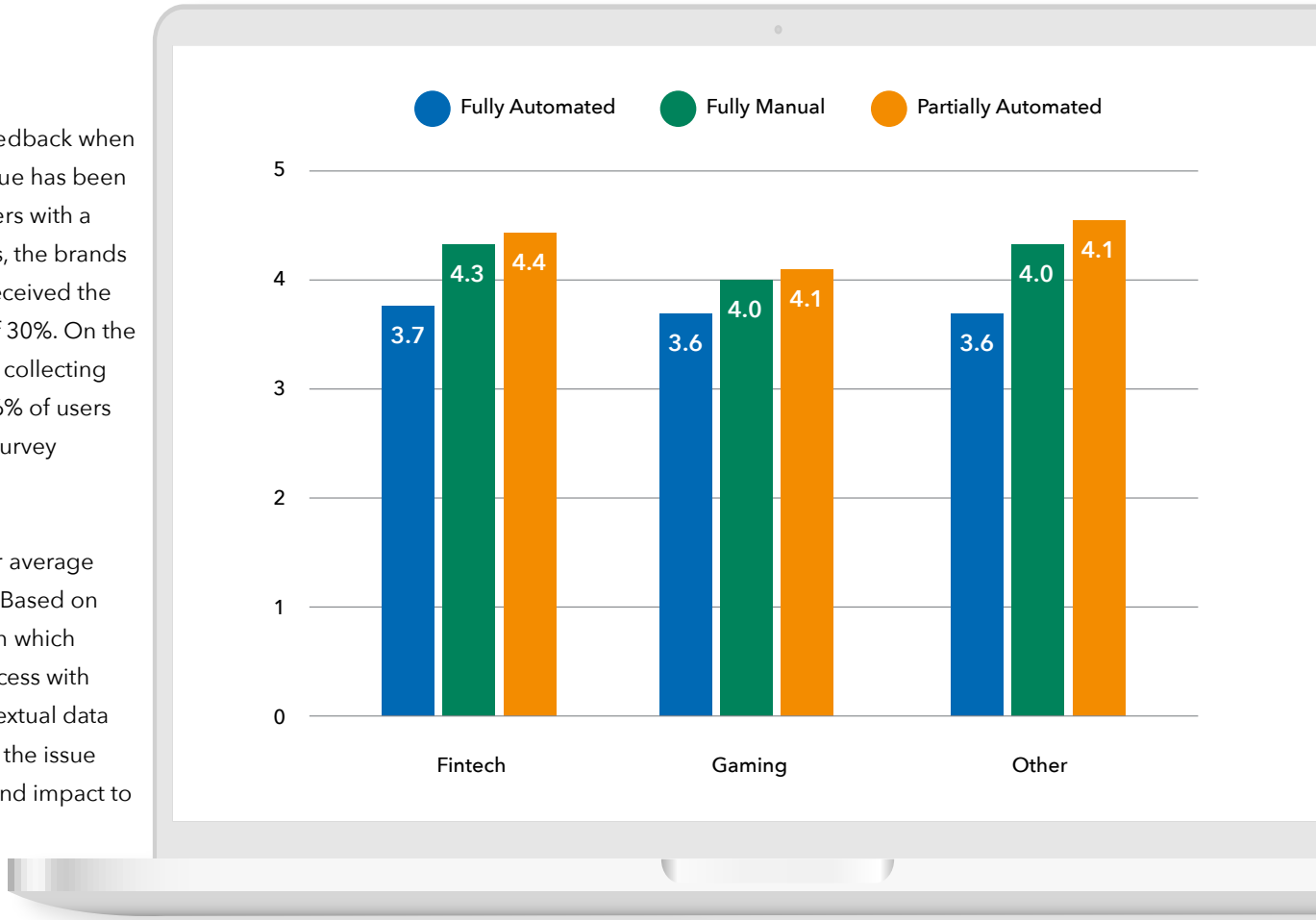


Fig. 6. Average CSAT by Automation Category

First Response and Resolution Trends Across Automation Categories

According to the data, the fintech category has the lowest human time to first response (HTTFR) and time to resolve (TTR), with the longest resolution time for fully manually handled issues at 60 hours only. This is likely due to their business model where their focus is to enable their customers to complete their transactions or get their questions answered in a timely manner. As for gaming, the difference is just as drastic seeing 193 hours spent from the time a user engages help to the point of resolution when dealing with manual assistance versus 126 hours with partial automation and a very minimal 66 hours with fully automated experiences. Lifestyle categories are spending roughly 176 hours to get to a point of resolution when issues are being handled manually, 101 hours when they are involving some form of automation and 74 hours when the entire issue resolution process is fully automated. The time to resolution (TTR) is significantly higher when issues are handled by agents only. Brands should think about how they can optimize this and whether there are opportunities to increase the use of partial automation to help agents resolve issues faster.

Based on these numbers, it's clear that when issues have the ability to be fully handled and resolved with automation tools, that resolution time is the shortest. When issues are being handed off to an agent from a bot, time to resolution does increase, however, those issues are likely more complex. Lastly, the time for fully manual assistance is much longer, which indicates that usage of automation speeds up the process of resolution drastically. The financial benefits that a brand can see from implementing some form of automation can be significant. Not only will a brand see a difference in their bottom line, but their users and agents will be happier as well. Automation is becoming a vital tool in the customer support realm and Helpshift is here to make it as easy as possible.

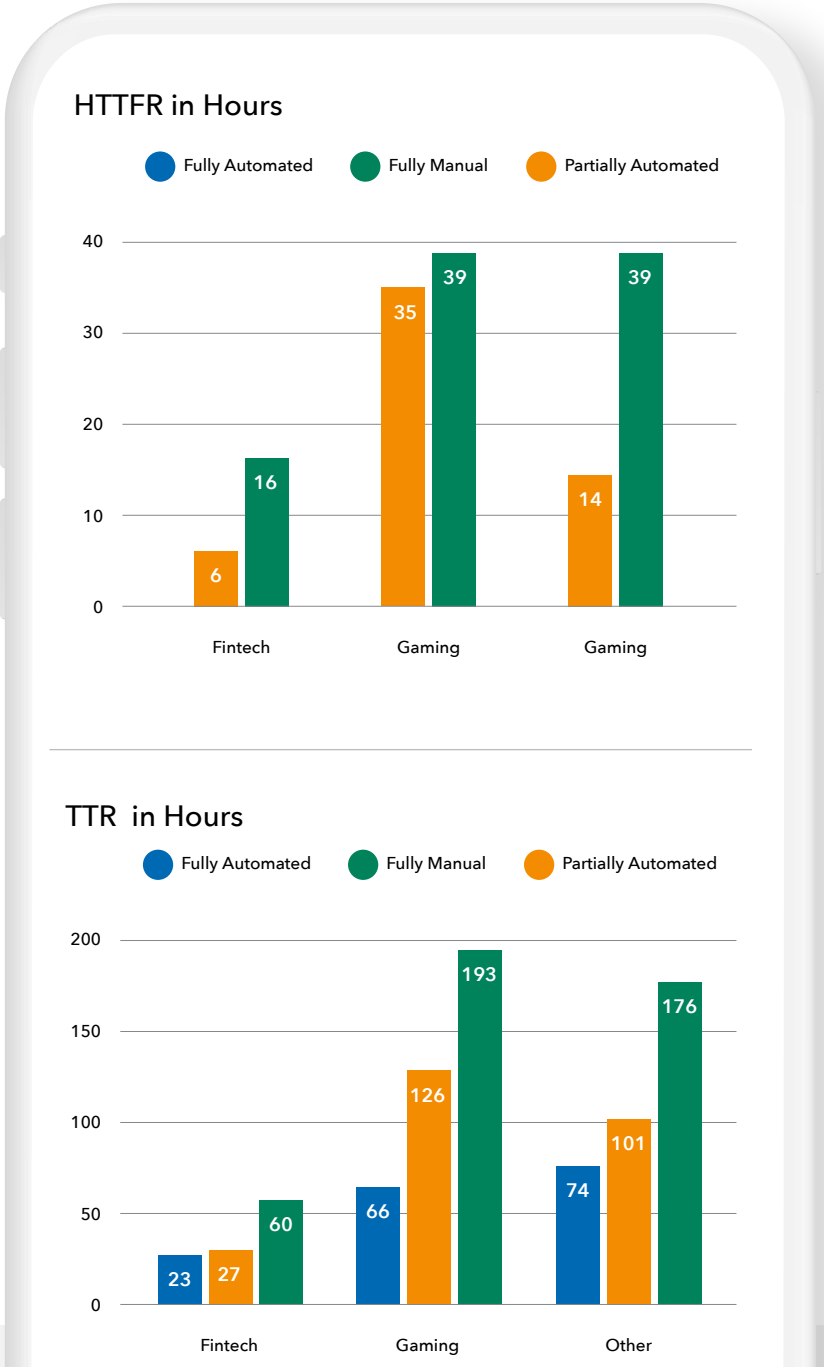


Fig. 7. Average HTTFR and TTR in Hours

Quick Search Bot Performance

Over the last year, Quick Search Bot average deflections across Helpshift customers have increased from 8.9% to 11.40%. This feature serves as a last chance deflection to help our customers provide effective self service and valuable feedback to enable continuous improvement of their FAQs. Users have a chance to provide feedback based on the top 3 FAQs shown, and our AI continuously learns from the feedback to show the best performing FAQs.

Empowering end-users with a rich, efficient, and searchable knowledge base directly in the app meets their need for a quick resolution, allowing them to get back to engaging with the app as soon as possible. Additionally, Helpshift insights make it easy for brands to identify which support content needs to be updated and which articles can be converted into an automated support journey.

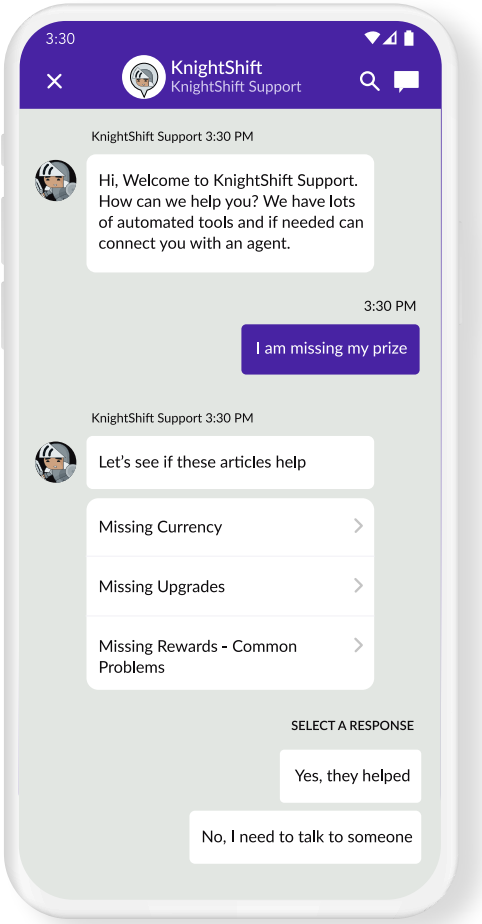


Table 1: Quick Search Bot Performance Across Helpshift Customers

	2019	2020	2021
Percent Deflections	5.40%	8.90%	**11.40%**
Total Additional Deflections	1.9M	3.8M	**6.45M**

In-App Messaging Remains Preferred Channel of Choice

According to Helpshift data, brands across verticals yield a higher CSAT when it comes to in-app messaging on mobile platforms versus email or webchat. Over the past year, CSAT scores related to support cases utilizing in-app messaging trended around 4.1 and higher. However, CSAT scores tended to hover between 3.6 and 3.4 when issues were handled via web or email channels (Fig. 7). It is safe to say consumers have noticed the effectiveness and convenience of in-app messaging. We predict this trend will continue to increase. These metrics indicate that users believe the way they receive support is just as meaningful as the resolution itself.

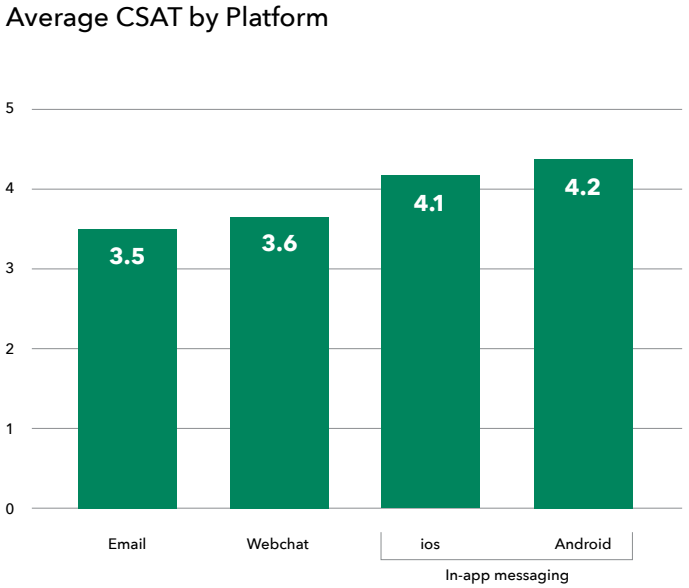


Fig. 7. Average CSAT by Platform; 2019–2020 vs 2020–2021

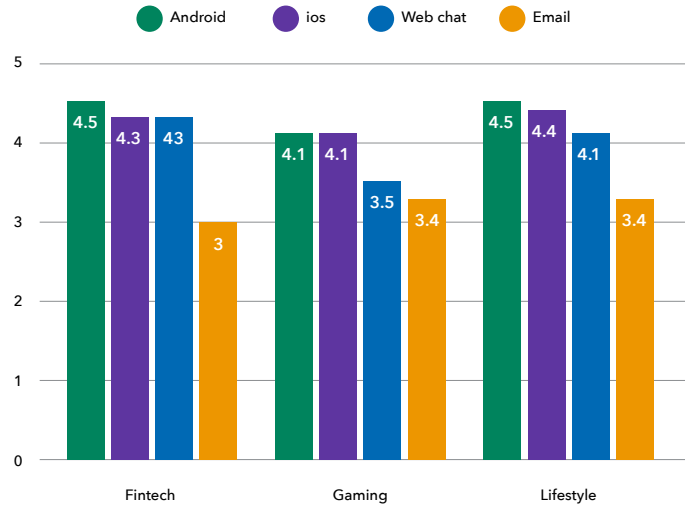


Fig. 8. Average CSAT by Platform and Vertical; 2021–22

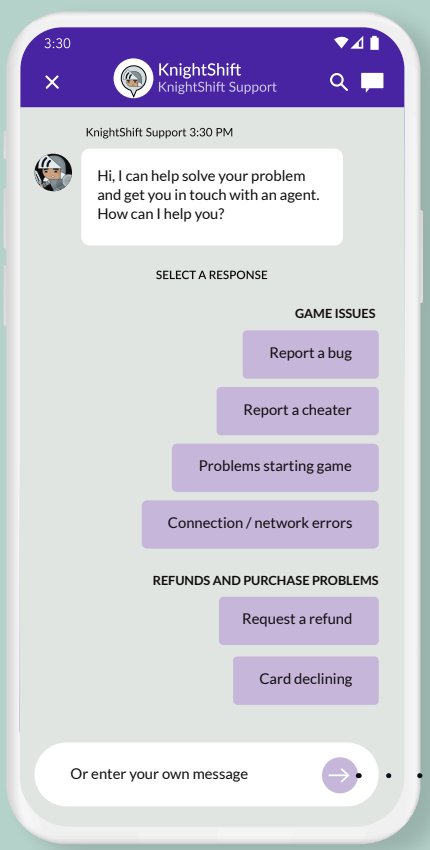
User-Intent: Starting The Conversation by Understanding The Issue

In 2020, Helpshift introduced its patented Smart Intents feature, which utilizes Natural Language Processing (NLP) and AI modeling to instantly identify the reason a user contacts support. Brands then used this intent tool to drive the remaining workflow. This has resulted in an increase in the use of automation, as brands have created segmented experiences that guide users through a fully- or partially-automated process.

The Helpshift model recognizes a diverse subset of text to reference the appropriate customer intent. For example, if a user typed "Someone stole my username," Smart Intents would reply with an "Unauthorized account access" automated workflow, including a security bot for resolving issues with stolen accounts.

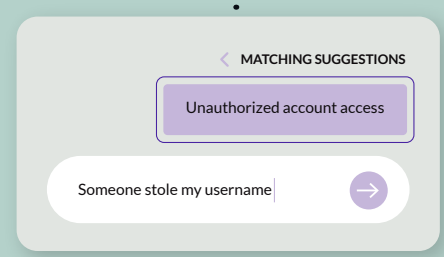
As the need for automation increases, it is increasingly critical for companies to quickly prioritize the most common reasons for users to engage with support, in order to assign specific automated experiences.

As seen in the "Top Issue Categories for Helpshift Customers" tables (p. 24-26), over 90 percent of support conversations can be categorized into a set of common problems. For example, in gaming these can range from gameplay questions, to account- or rewards-based issues. And, since most of these problems can be solved at least partially with an automated workflow, it's more important than ever for brands to have access to tools that enable them to quickly determine what a user needs so they can match that need with an existing automation workflow.



90%+

of support conversations can be categorized into a set of common problems

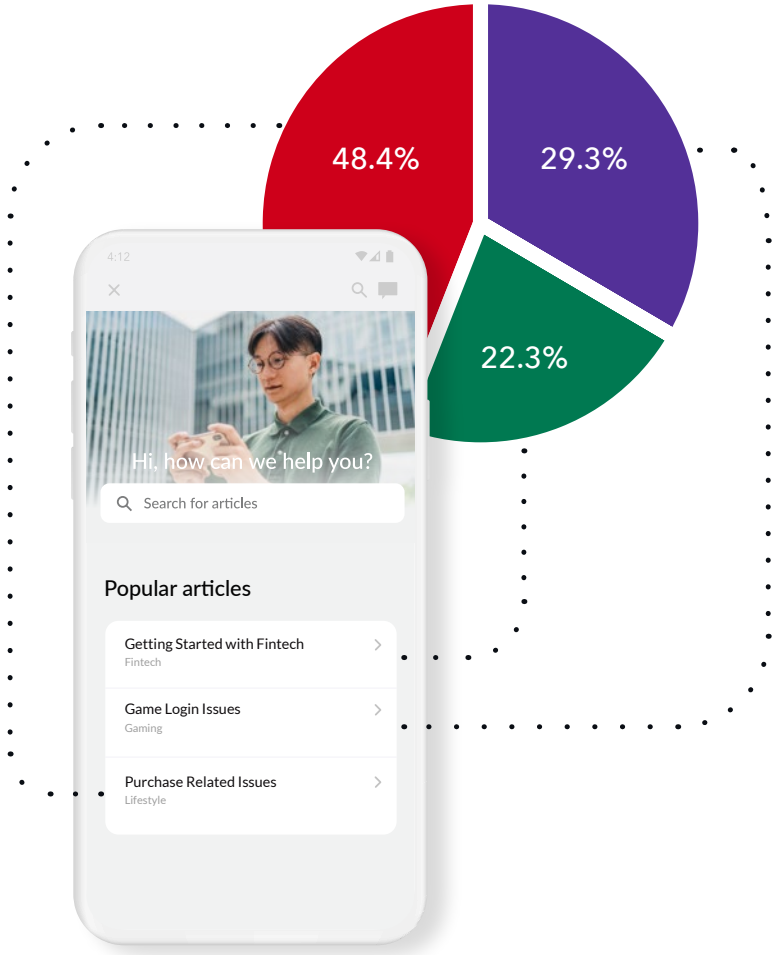


Most Common Intents and Automations

The key to high-scale automation entails knowing which issues can and should be automated. In 2021, our customers leveraged Helpshift AI to classify incoming issues into common categories, like those referenced in the "Top Issue Categories for Helpshift Customers" tables below (based on actual Helpshift data for 2021). This enabled them to focus their efforts on effective automation coverage for the most common reasons that customers contact support.

For example, in "Top Issue Categories for HS Gaming Customers" table data, we can see that approximately 29% of issues were related to resolving 'quests and rewards' discrepancies. Helpshift gaming brands then created a journey for quests and rewards by providing automated knowledge base content that highlighted the quests and rewards processes and procedures. They also trained AI to recognize questions about quests or rewards and deployed chatbots to connect with the backend reward system and confirm the status of a user's quest or reward. And, when necessary, they escalated the issue to an agent. As a result, quest- or reward-related questions were then handled with minimal effort. Brands then repeated this process across other known issue categories.

To achieve the high-scale needed with the increase in issue volume, brands used this known-issue information and automation tools to focus the customer journey, resulting in improved CSAT scores and time to resolution.



Top Issue Categories for Helpshift Lifestyle Customers

29.4%	Payment Related Issues	9.3%	Payment Processing Questions
		6.2%	Cancellation Fee Inquiries
		6%	Subscription Charge Issues
		5.8%	Charged for No-Show
		2.1%	Payout Issues
23.8%	Appointment Related Issues	11.5%	Scheduling Issues
		6.3%	Reminder Text Issues
		4.9%	Reschedule Appointment
		1.1%	Third Party Scheduling Issues
16.6%	Connected Accounts Related Issues	7.5%	Connecting Social Media Accounts
		5.3%	Change Profile Pictures
		3.8%	Change Portfolio Pictures
21.9%	Account Related Issues	6.5%	Cancel Membership / Trial Requests
		4.7%	Pay My Bill
		3.4%	Login Issues
		2.7%	Update Payment Information
		4.6%	Unable to Redeem Offer
2.6%	Contact Request	2.6%	Speak to an Agent

Top Issue Categories for Helpshift Gaming Customers

28.7%	Quests and Rewards	3.9%	In-Game Currency
		3.9%	Assistance with Quests
		6.9%	Didn't Receive Rewards
		3.6%	Lost Rewards
29.3%	Technical Issues	4.9%	Unresponsive Game
		11.8%	Freezing / Crashing
		3.6%	Gameplay Glitch
		5.6%	Connectivity Issues
19.7%	Gameplay Questions	6.1%	Difficulty Issues / Feedback
		1.6%	Fair Play Questions
		6.7%	Gameplay Feedback
		3.2%	Team Questions
20.2%	My Account	2.6%	Unban Requests
		.7%	Invited Friends
		5.4%	Recover Account
		9.9%	Transfer to a New Device

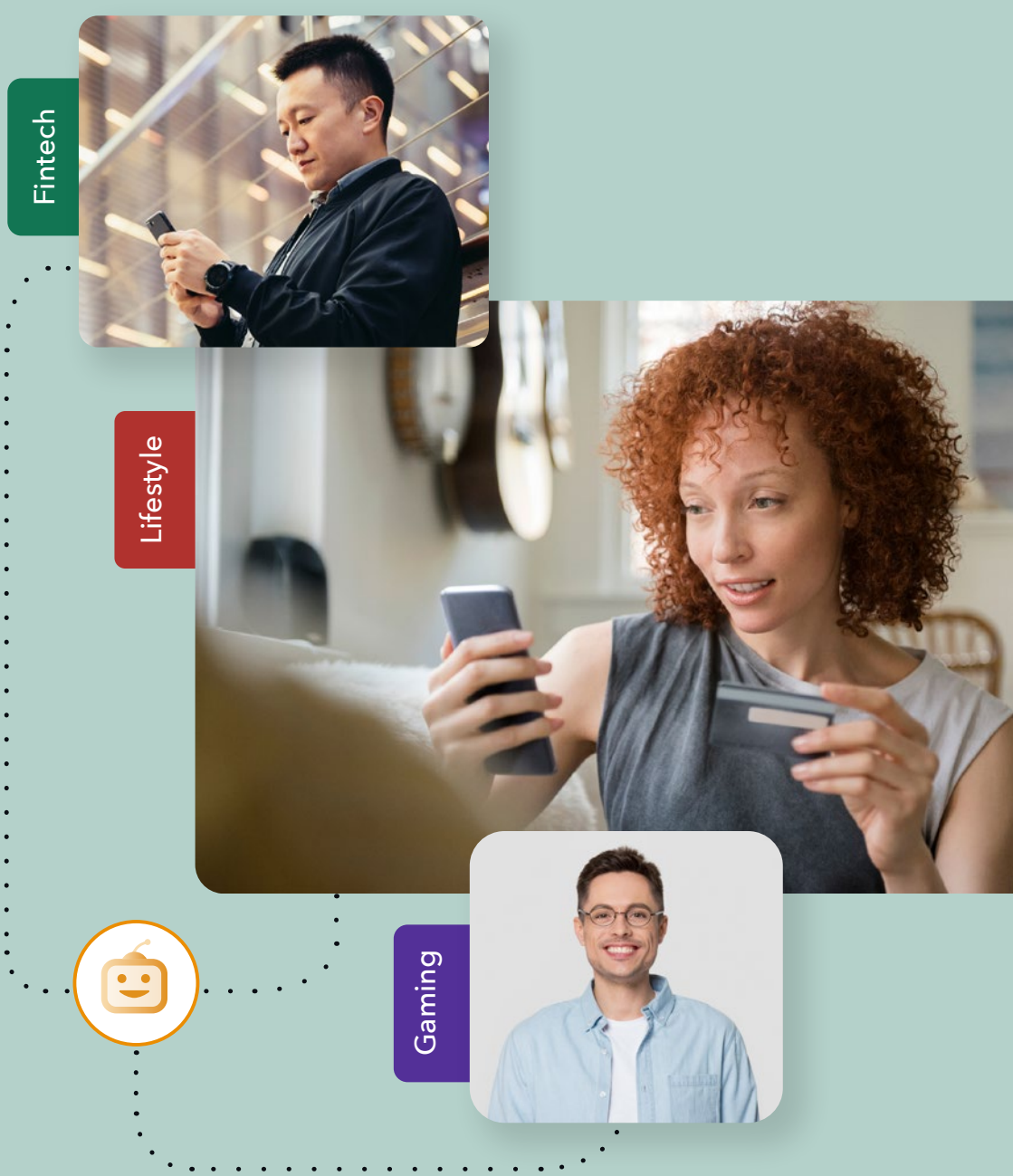
Top Issue Categories for Helpshift Fintech Customers

9.6%	Charges	4.4%	Refunds
		4%	Unauthorized Charge
		1.2%	Charge Error
42.8%	Card Questions	5.1%	Tracking Status
		5.8%	Card Limit / Extend My Limit
		2.6%	Purchase was Denied
		7%	Card was Lost or Stolen / Replace Card
		22.3%	Block / Unblock Card
6.2%	Account Questions	2.2%	First Time Using App
		1.3%	Registration Questions
		1.5%	Forgot Username or Password
		1.2%	Problems with Multi-Factor Authentication
36.7%	Payment Questions	4%	Payment Issues
		1.8%	Schedule Payments
		17.8%	Payment Arrangements
		5.2%	Payment Past Due
		7.9%	Other Payment Questions

Conclusion

Consumer behaviors may have shifted in this post-COVID market, but the necessity of automation and modern customer support remains. Helpshift is dedicated to aiding companies in overcoming the challenges of staffing and the need to optimize costs and support operations. Ticket volumes may be stabilizing in the gaming market with social restrictions becoming lighter, but we are not seeing any trends downward in the effectiveness of automation. On the other hand, fintech has accelerated the use of our AI and automation with upwards of 90% of tickets now being handled by bots during the support journey. With the retail and lifestyle categories strained by staffing issues like so many other markets, the data reveals companies in these categories are making promising moves to leverage more automation tools to optimize their support operations. According to the data over the last few years, lifestyle brands are likely enroute to utilizing automation just as much as fintech and gaming brands are.

Automation is no longer a trendy idea; it is a viable and necessary solution for today's digital brands. As Helpshift continues to focus on the needs and behaviors of evolving consumers, we are dedicated to continuing to innovate the best solutions for modern customer support and maximize ROI for our customers.



About Helpshift

Helpshift is a consumer-first digital support platform, made for companies that want to meet the rapidly evolving needs of their customers wherever they are. Helpshift combines smart segmentation with conversational AI to quickly understand customer intent and facilitate a guided support journey across modern experiences – from mobile apps to social messaging channels and from gaming consoles to the metaverse. Brands are able to solve customer problems quickly, improve the effectiveness of their agents, and transform support from painful events to continuous conversations. Enjoy exceptionally quick time to value as our easy-to-implement SDK, customizable automations, and white glove onboarding experience help you drive transformation and demonstrate ROI in a matter of weeks.

Acknowledgments

Authors:

Exon Smith, Product Marketing Manager
Jacqueline Crespo, Lead Product Marketing Manager
Samantha Pang, Vice President of Customer Success
Christine Dart, Global Head of Marketing

www.helpshift.com

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