

# Braving New Frontiers: Trust and Safety State of the Market Report 2022

August 2022: Complementary Abstract / Table of Contents



# Our research offerings

This report is included in the following research program(s):

## Trust and Safety

- ▶ Application Services
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Conversational AI
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms (DAP)
- ▶ Digital Engineering Services
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Engineering Services
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ Global Business Services
- ▶ Healthcare Business Process
- ▶ Healthcare Information Technology
- ▶ Human Resources Outsourcing
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing (IDP)
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Executive Insights™
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Outsourcing Excellence
- ▶ Pricing Analytics as a Service
- ▶ Process Mining
- ▶ Procurement
- ▶ Recruitment
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at [info@everestgrp.com](mailto:info@everestgrp.com)

Learn more about our  
**custom research capabilities**

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations,  
risk, technologies

Locations: costs, skills,  
sustainability, portfolios

# Contents

For more information on this and other research published by Everest Group, please contact us:

**Manu Aggarwal**, Partner

**Abhijnan Dasgupta**, Practice Director

**Aseem Nousher**, Senior Analyst

**Dhruv Khosla**, Senior Analyst

<b>1. Introduction and overview</b>	<b>5</b>
• Research methodology	6
• Everest Group trust and safety services process map	7
• Source of information	9
• Background of the research	10
<b>2. Summary of key messages</b>	<b>11</b>
<b>3. Introduction to T&amp;S</b>	<b>15</b>
<b>4. Key trends</b>	<b>17</b>
• Growing need for moderation in niche languages	19
• Rising cost of T&S outsourcing	21
• Dynamic regulatory landscape	22
• Increasing demand for live moderation	24
• Evolving ESG mandate	27
• Technology disruptors in T&S	30
• Trends continuing from the previous market study on T&S	32
<b>5. A note on the metaverse</b>	<b>33</b>
<b>6. Focus areas</b>	<b>35</b>
• Delivery scope expansion to non-traditional areas	37
• Alternate delivery models	38
• Growing collaboration in T&S	40
• Investment in policy development	41

# Contents

<b>7. T&amp;S BPS market overview</b>	<b>42</b>
• T&S BPS market size and growth	43
• T&S market adoption trends	44
• Delivery landscape	45
• Technology landscape	46
• Pricing models	47
<b>8. Service provider landscape</b>	<b>48</b>
• Overall service provider market share	49
• Major service providers by geography	50
• Major service providers by Industry	51
• Everest Group PEAK Matrix	52
<b>9. Appendix</b>	<b>53</b>
• Glossary of key terms used in the report	54
• Research calendar	56

## Background and scope of the research

Enterprises are facing numerous Trust & Safety (T&S) challenges that are driven by the rising volume and variety of content on digital platforms as well as the dynamic regulatory environment. In fact, there is no digital product or service that is immune to toxic content or conduct. For enterprises, the safety of the users in platforms has become the cornerstone of delivering a superior customer experience. More importantly, it is also the responsibility of any organization to prevent its platforms from being misused to propagate any harm in society. Serious efforts from various stakeholders to address these issues have resulted in the development of robust technology interventions and structured processes dedicated to T&S. Service providers are also making significant contributions to support the endeavor by managing the human talent requirement for content moderation – another crucial component of the T&S ecosystem. With the challenges in the space constantly evolving and disruptors such as the metaverse on the cards, it needs to be seen how enterprises and service providers can match the nuanced, dynamic, and constantly increasing demand in the space.

This research provides comprehensive coverage of the T&S market and analyzes it across various dimensions, such as market overview, service provider landscape, and the evolving market situation.

### In this research, we focus on:

- Introduction to T&S
- Key trends
- A note on the metaverse
- Enterprise focus areas
- T&S BPS market overview
- Service provider landscape

### Scope of this report



**Geography**  
Global



**Industry**  
All



**Services**  
Trust and safety services

## Overview and abbreviated summary of key messages (page 1 of 2)

This report examines the global T&S state of the market and provides a deep dive into critical T&S aspects like the trends driving the content moderation space and their implication on enterprises, the areas of focus for the enterprises, the T&S BPS market overview, and the service provider landscape

Some of the findings in this report, among others, are:

### Key trends in the T&S space

- While the share of niche languages on the internet is rising, content moderation in such languages remains inadequate due to low accuracy of ML models, a multitude of languages and dialects, and a shortage of skilled workers
- Enterprises need to provide content moderation in niche languages by translating policies into local languages, sourcing talent via hyper-local models, and strengthening capabilities in AI and NLP for niche languages
- Cost of T&S outsourcing has been on the rise due to the demand-supply gap for talent, demand for higher quality service from enterprises, rising cost of talent, and geopolitical triggers
- Legislations on content moderation and liability for service providers vary across countries, compelling enterprises to maintain a balance of local and global policies
- While live-streaming continues to gain popularity, inadequate moderation has hampered customer experience on digital platforms
- The requirement for immediacy, presence of multiple broadcasters for the same live event, lack of technological sophistication, and the need for real-time contextualization are the biggest challenges for moderating live content on platforms

### A note on the metaverse

- T&S challenges faced by enterprises in the metaverse would include abuse of avatars, concerns regarding data privacy and user security, safety of virtual assets, well-being of content moderators, and regulatory ambiguity
- The risk mitigation strategies that enterprises can adopt include establishing T&S policy infrastructure adaptable to the metaverse, enhanced safety interventions, rigorous authentication process, metaverse-centric well-being policies for moderators, and adopting a multi-stakeholder approach

## Overview and abbreviated summary of key messages (page 2 of 2)

Some of the findings in this report, among others, are:

### Areas of focus for enterprises

- There has been a shift toward delivery from non-traditional areas such as Africa and LATAM due to factors including ESG considerations and rising local demand
- Adoption of gig workers varies across different work types – mature adoption is seen in content curation & delivery, while adoption is in the initial pilot phase in case of content moderation

### T&S BPS market overview

- The T&S BPS market has seen impressive growth over the last few years, and this growth rate is likely to be sustained in the near future too, as providers are gearing up to expand their T&S capabilities and offerings
- North America remains the largest adopter of T&S services; social media, entertainment, and gaming collectively constituted the segment with the highest T&S outsourcing spend; review & compliance account for almost half of the total spend in T&S
- A mix of global as well as hyper-localized delivery model has emerged in the recent years to offer cost-effective and scalable solutions to clients

### Service provider landscape

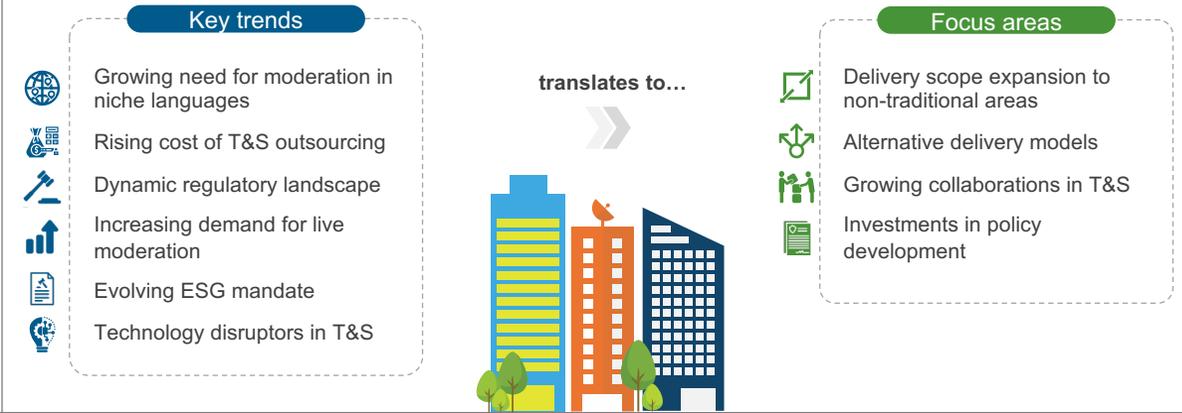
- The top two providers account for more than 35% of the market share in terms of ACV
- Accenture is one of the Leaders in three major geographies. TELUS International, Majorel, Teleperformance, Genpact, and TaskUs are among the Leaders in two major regions

# This study provides a deep dive into key aspects of the T&S market; below are four charts to illustrate the depth of the report

## Emerging trends in T&S

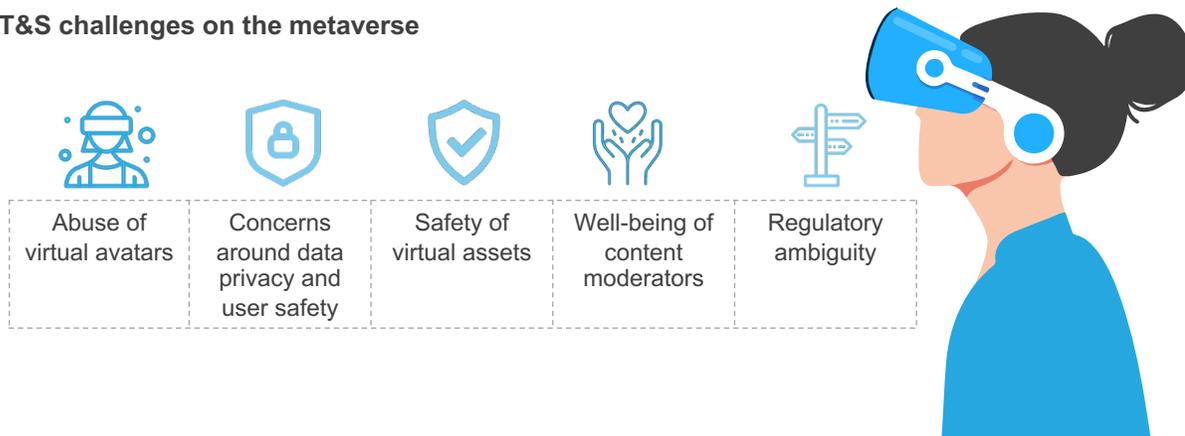


## Enterprise focus areas



## A note on the metaverse

### T&S challenges on the metaverse



## Service provider landscape – major service providers by industry

Top four service providers with respect to trust and safety engagements (in alphabetical order)

Social Media	Gaming	Other Media and entertainment
accenture	SUTHERLAND	accenture
genpact	CONCENTRIX	CONCENTRIX
majorel	Teleperformance <small>each interaction matters</small>	genpact
TELUS	TELUS	wipro

# Research calendar

## Trust and Safety

Published Planned Current release

Reports title	Release date
Content Moderation PEAK Matrix® Assessment 2021	March 2021
Content Moderation Service Provider Compendium 2021	June 2021
Content Moderators: Guardians of the Online Galaxy	August 2021
Play Hard, Play Safe	December 2021
Trust and Safety – Content Moderation Services PEAK Matrix® Assessment 2022	April 2022
Trust and Safety – Content Moderation Service Provider Compendium 2022	May 2022
Taming the hydra: Trust and Safety (T&S) in the metaverse	July 2022
Wisdom of the Crowd: The Gig Delivery Model in Trust and Safety (T&S)	August 2022
<b>Braving New Frontiers: Trust and Safety State of the Market Report 2022</b>	<b>August 2022</b>
What's the Deal?: Deal Trends in T&S	Q3 2022
Walking the Trust and Safety Regulatory Tightrope	Q4 2022
A Beautiful Mind: Wellness in T&S	Q4 2022
Key "Tech"away: Technology Ecosystem in Content Moderation (CoMo)	Q1 2023

Note: [Click](#) to see a list of all of our published Trust and Safety reports



Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our research also covers the technologies that power those processes and functions and the related talent trends and strategies. Our clients include leading global companies, service and technology providers, and investors. Clients use our services to guide their journeys to maximize operational and financial performance, transform experiences, and realize high-impact business outcomes. Details and in-depth content are available at [www.everestgrp.com](http://www.everestgrp.com).

## Stay connected

### Website

[everestgrp.com](http://everestgrp.com)

### Social Media

 @EverestGroup

 @Everest Group

 @Everest Group

 @Everest Group

### Blog

[everestgrp.com/blog](http://everestgrp.com/blog)

### Dallas (Headquarters)

[info@everestgrp.com](mailto:info@everestgrp.com)  
+1-214-451-3000

### Bangalore

[india@everestgrp.com](mailto:india@everestgrp.com)  
+91-80-61463500

### Delhi

[india@everestgrp.com](mailto:india@everestgrp.com)  
+91-124-496-1000

### London

[unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com)  
+44-207-129-1318

### Toronto

[canada@everestgrp.com](mailto:canada@everestgrp.com)  
+1-647-557-3475

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.