Trust and Safety – Content Moderation Services PEAK Matrix® Assessment 2021

March 2021: Complimentary Abstract / Table of Contents

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Contents

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Background and scope of the research

The proliferation of user generated content in digital platforms has raised new concerns regarding safety. There has been a spike in misinformation, hate speech, and violent content in the cyberspace, leading to an increase in government regulations on online platforms to curb such content. Further, increasing instances of account take overs, fake reviews, and fraud in this space have created a situation in which lapses in trust and safety could lead to significant financial losses for digital platforms as well as brands with an online presence. There has been a growing need for trust and safety, driven by these trends. The increased usage of social media and online marketplaces during the COVID-19 pandemic has further increased this demand.

The increasing reliance of small and mid-sized enterprises on trust and service outsourcing has been a trend in the recent past. The demand for trust services remained high in the traditional markets of North America and Europe, while the emerging geographies including Asia Pacific (APAC), the Middle East, and Africa (MEA), exhibited fast-paced growth. Some of the key means that providers are using to differentiate themselves are end-to-end transformative solutions, combined with domain and industry expertise, wellbeing solutions, and the next-generation innovative offerings leveraging automation and analytics. The purpose of this research is to understand and assess trust and safety service providers based on their vision & capabilities and impact on the trust and safety services market and position them on Everest Group PEAK Matrix®.

In this research, we focus on:

- Trust and safety – content moderation services PEAK Matrix® 2021 including service provider capability
- Service provider landscape
- Remarks on key strengths and limitations for each service provider

Scope of this report:

Geography
Global

Service providers
This research covers the following 18 trust and safety – content moderation services service providers: Accenture, Alorica, Appen, Besedo, Concentrix, Conectys, Genpact, GlobalLogic, Majorel, HGS, Sutherland Global, TaskUs, Tech Mahindra, Teleperformance, Telus International, TTEC, Webhelp, and Wipro

Services
Trust and safety – content Moderation Services

Overview and abbreviated summary of key messages

This report examines the trust and safety – content moderation services market and its service provider landscape. It provides detailed analysis of the capabilities and market impact of service providers and their relative position on the Everest Group PEAK Matrix. It will assist its key stakeholders understand the current state of the service provider landscape.

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

Everest Group Services PEAK Matrix for trust and safety – content moderation services

Everest Group classifies 18 trust and safety – content moderation service providers on the Everest Group Services PEAK Matrix into three categories of Leaders, Major Contenders, and Aspirants
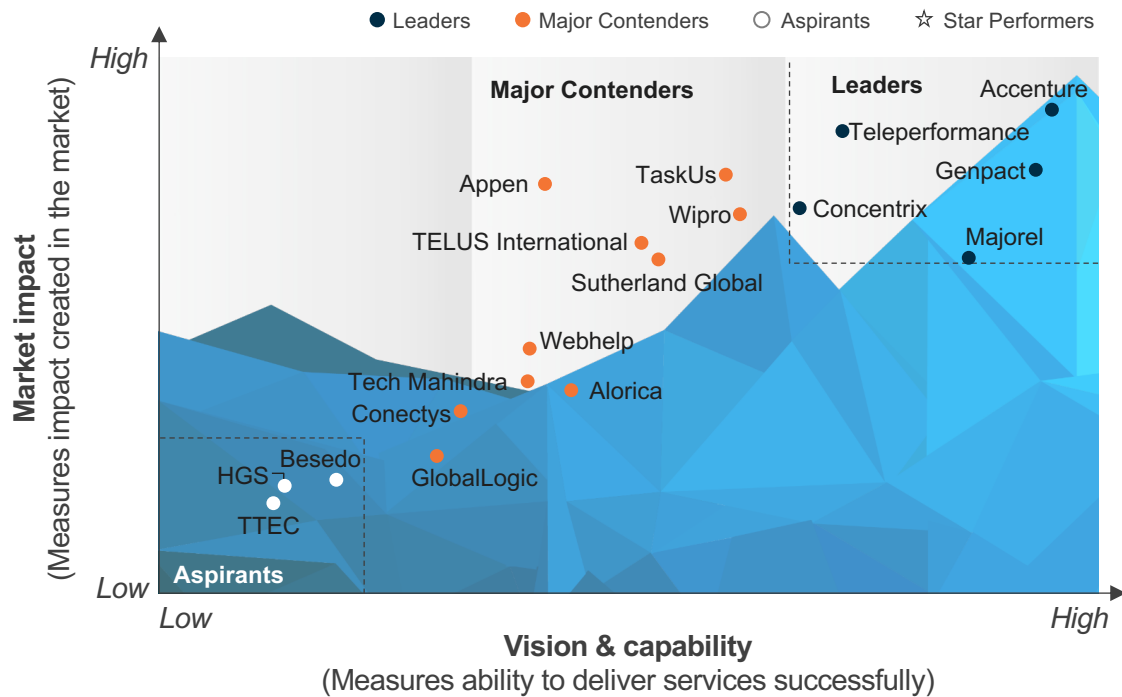
- Accenture, Concentrix, Genpact, Majorel, and Teleperformance are the Leaders
- Major Contenders include Alorica, Appen, Conectys, GlobalLogic, Sutherland Global, TaskUs, Tech Mahindra, Telus International, Webhelp, and Wipro
- Besedo, HGS, and TTEC are the Aspirants on the Services PEAK Matrix for trust and safety – content moderation services

Key insights on trust and safety – content moderation services market

- Accenture and Genpact have contributed more than 30 percent of the market share in terms of ACV
- Accenture is a leader in all major geographies
- Genpact, Majorel, Teleperformance, and Wipro lead in two major geographies
- Accenture is a leader in all major industries. Sutherland and Teleperformance stand out as the top providers in three major industries

This study offers three distinct chapters providing a deep dive into key aspects of trust and safety – content moderation services market; below are three charts to illustrate the depth of the report

Everest Group Trust and Safety – Content Moderation Services PEAK Matrix® Assessment 2021[1]

Illustrative example

- ● Leaders
- ● Major Contenders
- ○ Aspirants
- ☆ Star Performers

Market impact (Measures impact created in the market)

High

Low

Major Contenders

Leaders

- Accenture
- ● Teleperformance
- Appen ●
- TaskUs ●
- Genpact ●
- Wipro ●
- ● Concentrix
- TELUS International ●
- ●
- Majorel ●
- Sutherland Global
- ● Webhelp
- Tech Mahindra ●
- ● Alorica
- Conectys
- HGS ○ Besedo ○
- TTEC
- GlobalLogic ●

Aspirants

Low — High

Vision & capability
(Measures ability to deliver services successfully)

Capability assessment

Illustrative example

Measure of capability: ● High ◐ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1									
Service provider 2									
Service provider 3									
Service provider 4									
Service provider 5									
Service provider 6									
Service provider 7									
Service provider 8									
Service provider 9									

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ◐ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths

- Service provider 1 provides a full spectrum of services in the trust and safety- content moderation space, with wide presence in almost all major processes
- In addition to traditional buyers such as social media, and hi-tech companies, it has rich expertise in catering to clients in the retail and distribution, media and entertainment industry, gaming, and travel and hospitality

Areas of improvement

- While service provider 1 focuses on large clients to drive growth, its ability to successfully cater to small- and mid-sized companies is somewhat untested
- While it has rich experience serving clients in North America and Asia Pacific, its client base in European markets is small

1 Assessments for Appen and GlobalLogic exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with trust and safety – content moderation services clients

Source: Everest Group (2021)

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