

Content Moderators: Guardians of the Online Galaxy

August 2021: Complimentary Abstract / Table of Contents



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Background of the research

Enterprises across industries managing online platforms are increasingly facing Trust and Safety (T&S) challenges in multiple forms. The rapid increase in the User-Generated Content (UGC) is one of the primary reasons as this also implies an increase in obnoxious and egregious content such as fake news, hate speech, nudity, profanity, bullying, and harassment. User-safety is also threatened by platform safety-related concerns such as account takeovers and identity theft.

Any lapses in T&S may result in unpleasant experiences for users, which in turn could cause significant financial and reputational losses for digital platforms and brands with an online presence. Inadequate T&S measures can also lead to loss in precious ad revenues from ads placed on platforms. With growing regulatory interest and interventions in this space, the need for enterprises to incorporate robust T&S measures on their platforms cannot be overstated, especially, as the emerging trends in this space continue fueling the demand for such services. The dynamic nature of T&S space dictates that enterprises must be agile enough to adapt not only to rise in volume and complexity of social media content, but also to stringent regulatory considerations, along with increased accountability for online content. At the same time, prudent leverage of automation is becoming inevitable for the enterprises to ensure trust and safety at scale. They must also ensure well-being of their content moderators who are exposed to distasteful and harmful content on a day-to-day basis.

The demand for T&S has remained high in the traditional markets of North America and Europe, Middle East, and Africa (EMEA), while emerging geographies of Asia Pacific (APAC) have exhibited fast-paced growth, albeit with a decline in the overall market share.

In this report, we focus on:

- Introduction to Trust and Safety (T&S) with an emphasis on Content Moderation (CoMo)
- Evolving content moderation trends: key trends in content moderation and corresponding implications for enterprises
- Key focus areas for enterprises
- T&S BPS market overview
- Service provider landscape

Scope of this report:



Geography
Global



Service providers covered

Accenture, Alorica, Appen, Besedo, Concentrix, Conectys, Genpact, GlobalLogic, Majorel, HGS, Sutherland Global, TaskUs, Tech Mahindra, Telus International, TTEC, Webhelp and Wipro



Services

Trust and safety – content moderation 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 T&S service provider landscape

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

The need for T&S in enterprises

- T&S is a rapidly evolving concept that involves a spectrum of activities across industries
- Content moderation (under review and compliance) is the most prominent set of activities within T&S spectrum. However, other activities such as content curation, ad support, content services (e.g., translation and localization), and platform safety are also being increasingly employed
- The repercussions of not incorporating robust T&S measures are manifold and can lead to customer churn, revenue losses, poor reputation and preference among advertisers, and diminished platform credibility

Evolving Content Moderation (CoMo) trends

- Online fake news, short-video format (e.g., Instagram stories), and live audio streaming (through apps like Clubhouse) are adding to the diversity of content that would need moderation
- Regulations around user data safety and content moderation are on the rise with several countries coming up with new legislations which are also complemented by other forms of activities such as multi-stakeholderism
- Due to the lack of technology maturity, automated solutions have not been able to effectively substitute human content moderators. Hence, the key is to have an optimum mix of human and automated moderation for accurate CoMo at scale

Implications for enterprises

- The rise in Gen Z as a generation of internet users would make enterprises strengthen the CoMo activities on their platforms
- With increasing regulations around T&S, enterprises would have to find the sweet spot of balance between the law of the land and the enterprise's own platform regulations

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

- **H2R practices for T&S workforce:** enterprises would increasingly focus on the hire-to-retain cycles of their CoMo workforce and ensure that well-being is embedded into every aspect of employee life cycle
- **Technology investments:** the increasingly crucial role that technology plays in ensuring robust T&S practices, would be driving enterprises to make investments into T&S-related solutions for in-house use, as well as to leverage the same commercially

T&S BPS market overview

- The T&S services BPS market has experienced an impressive growth over the past 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
- Service providers are leveraging a global delivery model that helps enterprises accrue benefits such as cost arbitrage, scale, and localized services
- Service providers are offering a gamut of technological solutions to support the various core and supporting T&S activities of enterprises

Service provider landscape

- The top two providers account for more than 30% of the market share in terms of ACV
- Accenture is a leader in all the major geographies. Genpact, Majorel, Teleperformance, and Wipro lead 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

Evolving content moderation trends

Key themes impacting content moderation services

- Content volume and variety explosion
- Changing demographics
- Increasing regulatory oversight
- Shift toward greater localization
- Technology leverage



Enterprise focus areas for T&S-CoMo

Key market trends

- Content volume and variety explosion
- Changing demographics of internet users
- Increasing regulatory oversight
- Shift toward greater localization
- Technology leverage

translates to...

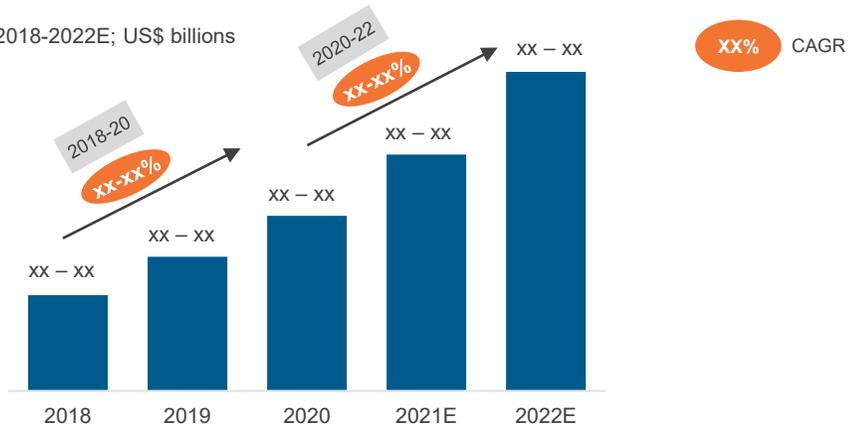
- Negative toll on the well-being of the content moderators due to exposure to egregious content
- Element of dynamism added to T&S policies
- Increased automation requirement to handle the scale of content
- Need for hiring and retaining trained talent to handle CoMo activities
- Focus on ensuring adequate T&S for handling of localized content

Focus areas

- T&S - CoMo policy redesign
- H2R practices for T&S workforce
- Technology investments
- Localized trust and safety

T&S services BPS market size

T&S services BPS market 2018-2022E; US\$ billions



Service provider landscape – major service providers by industry

Social media	Gaming	Retail and distribution
accenture	CONCENTRIX™	accenture
genpact	SUTHERLAND	appen™
majorel	Tech Mahindra	GlobalLogic®
Teleperformance each interaction matters	Teleperformance each interaction matters	SUTHERLAND

Research calendar

Trust and Safety

■ Published
 ■ Planned
 ■ Current release

Flagship reports

	Release date
Trust and Safety – Content Moderation Services PEAK Matrix® Assessment 2021	March 2021
Trust and Safety – Content Moderation Service Provider Compendium 2021	June 2021
Content Moderators: Guardians of the Online Galaxy	August 2021
Trust and Safety – Content Moderation Services PEAK Matrix® Assessment 2022	Q1 2022
Trust and Safety – Content Moderation Service Provider Compendium 2022	Q2 2022
Trust and Safety State of the Market Report 2022	Q3 2022

Thematic reports

	Release date
Play Hard, Play Safe! – T&S Concerns and Solutions for the Gaming Industry	Q4 2021
Walking the Trust and Safety Regulatory Tightrope	Q1 2022
Key “Tech”away: Technology Ecosystem in Content Moderation (CoMo)	Q3 2022
A Beautiful Mind: Wellbeing in Trust and Safety	Q4 2022

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