

Trust and Safety – Content Moderation Services PEAK Matrix® Assessment 2022

April 2022: Complimentary Abstract / Table of Contents



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Introduction

The scope and applications of trust and safety services are no longer parochial to the social media industry and are increasingly finding use cases across multiple industries such as gaming, and retail and distribution. As more and more enterprises discover the vital need to ensure trust and safety of the users on their platforms, service providers across multiple categories – IT/BPO, Contact Centre Outsourcing (CCO) providers, and niche/specialist providers – are gearing up to serve the diverse needs of the market. With an increasing user base as a result of the proliferation of the internet across the globe as well as enhanced regulatory and media scrutiny, the importance of accurate trust and safety services would continue to grow.

Service providers are also focusing on offering differentiated services to their buyers. Recently, the trust and safety market has seen service providers increasingly embracing the gig/flexi-workforce model, which not only ensures scalability but also caters to the vital need for the localized knowledge of socio-political and cultural nuances – qualities that are important for moderation related decision making. Given its challenges, gig workforce is currently limited to only certain work types, but it would be interesting to see its evolution and adoption in the coming years. Similarly, service providers are also emerging as strategic partners to their buyers by offering services related to the critical element of policy management.

This research aims to assess the capabilities, offerings, and resulting impact created by the service providers in the trust and safety market, and position them on Everest Group’s trust and safety – content moderation PEAK Matrix®.

In this research, we focus on:

- Trust and safety – content moderation services PEAK Matrix® 2022 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 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's PEAK Matrix® for trust and safety – content moderation services

- Everest Group classified 18 trust and safety – content moderation service providers on Everest Group PEAK Matrix® into three categories of Leaders, Major Contenders, and Aspirants
- Accenture, Concentrix, Genpact, Majorel and Teleperformance are Leaders
- Alorica, Appen, Conectys, GlobalLogic, Sutherland Global, TaskUs, Tech Mahindra, TELUS International, Webhelp, and Wipro are Major Contenders
- Besedo, HGS, and TTEC are Aspirants
- TELUS International and Webhelp are Star Performers as they have demonstrated the most improvement in their year-over-year PEAK Matrix® positioning

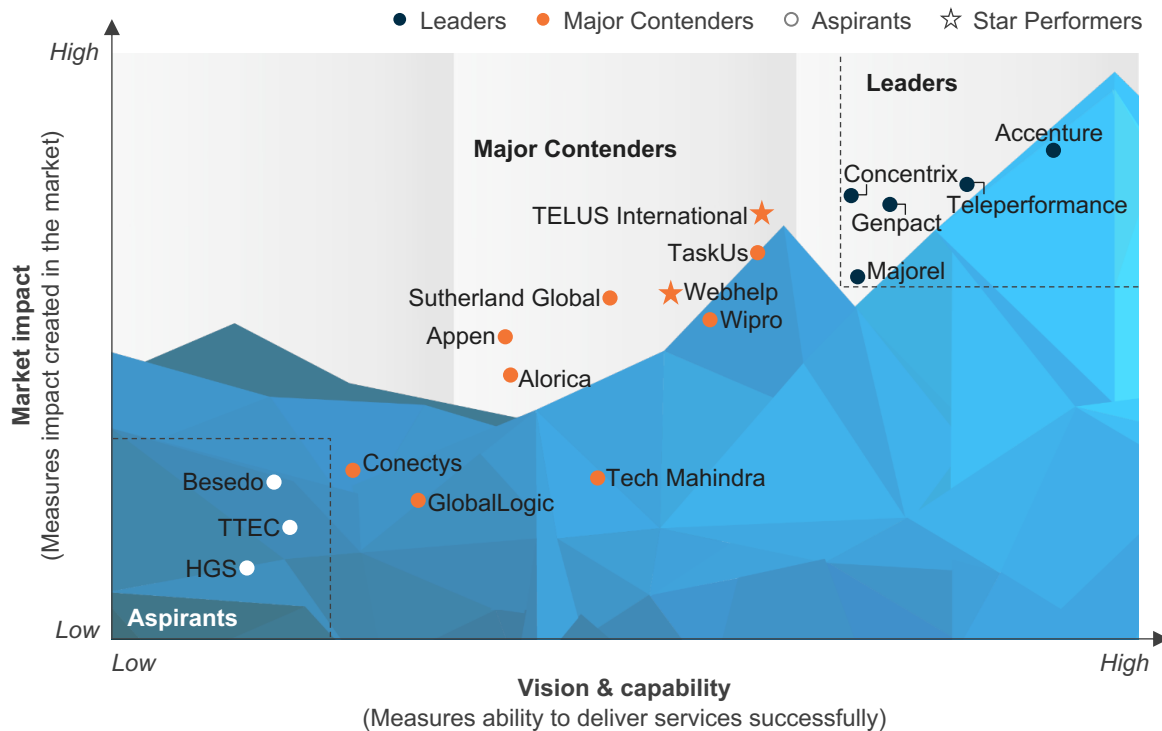
Key insights on trust and safety – content moderation services market

- Accenture and TELUS International have contributed to more than 35% of the market share in terms of ACV¹
- Accenture is one of the leaders in three major geographies. TELUS International, Majorel, Teleperformance, Genpact, and TaskUs are one of the leaders in two major regions
- Accenture, Concentrix, TELUS International, Genpact, and Teleperformance are one of the leaders in three industries. Sutherland Global and Wipro are one of the leaders in two industries

¹ The market shares here represent the respective market share of the total ACV of the 18 service providers featured in this study. These 18 service providers account for ~70% of the total trust and safety – content moderation market

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

Trust and Safety – Content Moderation Services PEAK Matrix® Assessment 2022^{1,2}



1 Assessments for Appen and HGS excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with trust and safety – content moderation buyers.
 2 There have been changes in the assessment methodology and weightages of parameters in the current i.e., 2021 assessment, compared to the 2020 assessment.

Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: 🔄 Low ● High

Providers	Market impact				Vision & capability				
	Market Adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 2	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 3	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 4	🔄	🔄	🔄	🔄	●	🔄	🔄	🔄	🔄
Provider 5	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 6	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 7	🔄	🔄	🔄	🔄	🔄	🔄	●	🔄	🔄
Provider 8	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 9	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄

Everest Group's remarks on providers

Illustrative example

Measure of capability: 🔄 Low ● High

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

- Provider 1 offers services across the trust and safety value chain to buyers from all major industries
- It offers a good mix of offshore, nearshore and onshore delivery options to its buyers

Limitations

- While Provider 1 is experienced in serving the T&S needs of North American buyers, its ability to serve buyers from APAC region is untested
- Provider 1 currently does not provide any services in XXX and YYY work types. Hence, buyers would not be able to get service fulfillment of their end-to-end trust and safety needs

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
Content Moderation Service Provider Compendium 2022	Q2 2022
BPS Trends and Opportunities in the Consumer Packaged Goods (CPG) Market	Q2 2022
Wisdom of the Crowd: The Gig Delivery Model in Trust and Safety (T&S)	Q2 2022
Trust and Safety State of the Market Report 2022	Q3 2022
Binge in Peace: Trust and Safety (T&S) in the OTT Industry	Q3 2022
Walking the Trust and Safety Regulatory Tightrope	Q3 2022
Key "Tech"away: Technology Ecosystem in Content Moderation (CoMo)	Q4 2022
A Beautiful Mind: Wellness in Trust and Safety	Q4 2022

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