Trust and Safety – Content Moderation Service Provider Compendium 2022

May 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
- 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

- 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 Information Technology
- Locations Insider™
- Marketing Services
- Market Vista™
- Mortgage Operations

- Multi-country Payroll
- Network Services and 5G
- Outsourcing Excellence
- Pricing-as-a-Service
- Process Mining
- Procurement
- Recruitment
- Retirements Technologies
- 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)

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Learn more about our
custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Contents

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01
Robust definitions and frameworks
Trust and safety – content moderation value chain, PEAK Matrix®, and market maturity

02
Primary sources of information
Annual contractual and operational RFIs, service provider briefings and client interviews, and web-based surveys

03
Diverse set of market touchpoints
Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04
Fact-based research
Data-driven analysis with expert perspectives, trend analysis across market adoption, contracting, and service providers

Proprietary contractual database of 400+ trust and safety – content moderation services contracts (updated annually)

Year-round tracking of 15+ trust and safety – content moderation service providers

Large repository of existing research in trust and safety – content moderation services

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing decisions

Executive-level relationships with enterprises, service providers, technology providers, and industry associations

The Trust and Safety – Content Moderation Service Provider Profile Compendium 2022 report has 18 service provider profiles

Service Provider X | trust and safety – content moderation services profile (page 1 of 5)
Overview

Company profile:
XX is a global professional services company with leading capabilities in digital, cloud...
Combining experience and specialized skills across more than 40 industries, XX offer...
consulting, interactive technology, and operations services – all powered by advanced...
intelligent operations centers. Over XX, serve clients in more than YY countries.

Headquarters: XX   **Website:** www.yy.com

Key leaders
- AA, Chief Operating Officer, XX Operations
- BB, Business Lead, Trust and Safety, XX Operations
- CC, Global Client Experience Lead

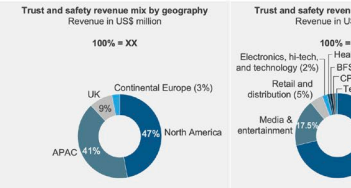| Trust and safety – content moderation services	2019[1]	2020[1]
Revenue (US$ million)		
Number of FTEs		XX
Number of clients		

1   12 months ending December 31 of any particular year, i.e., from January 1, XXXX to December...

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Service Provider X | trust and safety – content moderation services profile (page 2 of 5)
Client portfolio

Key trust and safety- content moderation engagements	
Client name	**Work type**
A leading e-commerce giant	Commercialization / ad sup...
A global web hosting platform	Review and compliance
A UK-based insurance company	Platform safety
A leading social media / instant messaging platform	Review and compliance, co...
A leading internet giant	Review and compliance, co...

Trust and safety revenue mix by geography
Revenue in US$ million

100% = XX

UK 9%
Continental Europe (3%)
APAC 41%
North America 47%

Trust and safety revenu...
Revenue in US...

100% = ...
Electronics, hi-tech, and technology (2%)
Retail and distribution (5%)
Media & entertainment 17.5%
Healt...
BFS...
CP...
Tel...

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Service Provider X | trust and safety – content moderation services profile (page 3 of 5)
Key delivery locations

Montceau
San Bruno
Medellín
Bogota

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Service Provider X | trust and safety – content moderation services profile (page 4 of 5)
Technology solutions/tools

Technology name	Year launched	Description
XX	2021	An AI-powered solution to support the authe... intended is the person using the authorize... unauthorized people or conditions are prese...
YY	2022	A fully-immersive digital environment based... The solution includes a gamified map-based... screening tests, and seek information throu...
XX	2021	A SaaS-based and ML-assisted annotation... within images; supports complex and niche...
YY	2021	Cloud-based virtual learning platform levera... impart outcome-driven learning programs. In... facilitators leverage this platform for more sp...
XX	2020	It helps to identify people in photos, videos, ... as the distance between the eyes or the sha...
YY	2020	A globally scaled, managed training data, da... community of one million professional annot... supports scalable data annotation services f... advanced quality check system, and stream...
XX	2020	A virtualized recruitment process for hiring m...
YY	2019	A real-time translation bot that assists agent... detects languages and integrates them with...
XX	2019	It ensures that content moderated by its tear...

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Service Provider X | trust and safety – content moderation services profile (page 5 of 5)
Everest Group assessment – Major Contender

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
- XX provides services across the trust and safety services value chain and has strong experience in serving North American and European buyers
- With its recent acquisition of **YY**, XX hopes to expand its client base and augment its capabilities, especially in the area of Child Sexual Abuse Material (CSAM) moderation
- It has acquired **ZZ**, which has given it access to leveraging a gig workforce through the **YY** platform. The gig workforce performs services under the content curation and delivery (data annotation) and content services (transcription) work types
- The gig workforce has also enabled XX to expand its language offerings. While historically it used to primarily serve in English, with limited offerings in other languages, it has recently expanded its language capabilities and added language groups such as Indic, European, and African

Limitations
- While XX has experience of serving multiple clients from industries such as electronics/technology, media and entertainment[1] and healthcare, its abilities to serve the trust and safety needs of the gaming and retail and distribution industries remain untested
- XX's delivery geography through FTEs is skewed toward offshore regions, and hence clients desiring an FTE talent pool aligned to local cultural and socio-political nuances for content moderation may find limited scalability for onshore and nearshore locations
- Since its social media clientele is limited, its abilities at handling complex egregious content cannot be proven unequivocally
- It has historically had a strong focus on handling text and image-based content and has limited experience working on audio and video content. While XX has recently made investments in this area, its expertise in moderating audio and video content remains to be seen

1   According to Everest Group's classification (refer to Glossary on slide 111)

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Research calendar
Trust and Safety

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**
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

Note: Click to see a list of all of our published Trust and Safety reports

Everest Group®

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