

Augmented Intelligence: The Future of Trust and Safety (T&S) is Humans + AI

September 2023: Complimentary Abstract / Table of Contents



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Introduction

Over the years, enterprises across industries have recognized the importance of maintaining a strong Trust and Safety (T&S) infrastructure to deliver a superior customer experience. However, there are multiple considerations that they must evaluate while making crucial investment decisions for T&S. On one hand, the technology disruption caused by generative AI is expected to result in a rapid surge of AI-generated content on digital platforms. While there are major concerns regarding the safety of users due to generative AI, we are yet to fully understand what the potential safety threats are or how to manage them. On the other hand, adverse macro-economic conditions are putting pressure on enterprise budgets, compelling them to optimize their T&S spending. Enterprises, service providers, and technology vendors are now looking at how they can exploit the potential of AI, advanced analytics, deep learning, and other key technologies to do more with less. They are also exploring how to unlock synergies between technology and human talent. It needs to be seen how some of the evolving trends in the T&S market will play out, and how the nuanced, dynamic, and constantly increasing demand for T&S can be addressed.

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:

- Background and context
- Emerging trends
- Implications on sourcing priorities for enterprises
- 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

As the Trust & Safety services segment experiences complexities brought by reduced enterprise spending and surging content volume, enterprises are adapting to changes such as generative AI, megamergers and platform-based solutions. In this report, we explore the emerging trends and sourcing implications for enterprises, along with the service provider landscape in T&S. The study will assist key stakeholders, including enterprises, service providers, and technology providers, in understanding the current state of the T&S services market.

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

Emerging trends

- Emerging technologies accelerating human moderation
- Rise of platform-based solutions in T&S
- Mega mergers leading to market consolidation

Implications on sourcing priorities

- During the time of market consolidation in T&S, enterprises may consider restructuring their sourcing portfolio to unlock economies of scale and efficiencies, and to reduce the concentration risk
- Advances in T&S technology rely on a connected ecosystem that encompasses technology providers, service providers, and enterprises working together

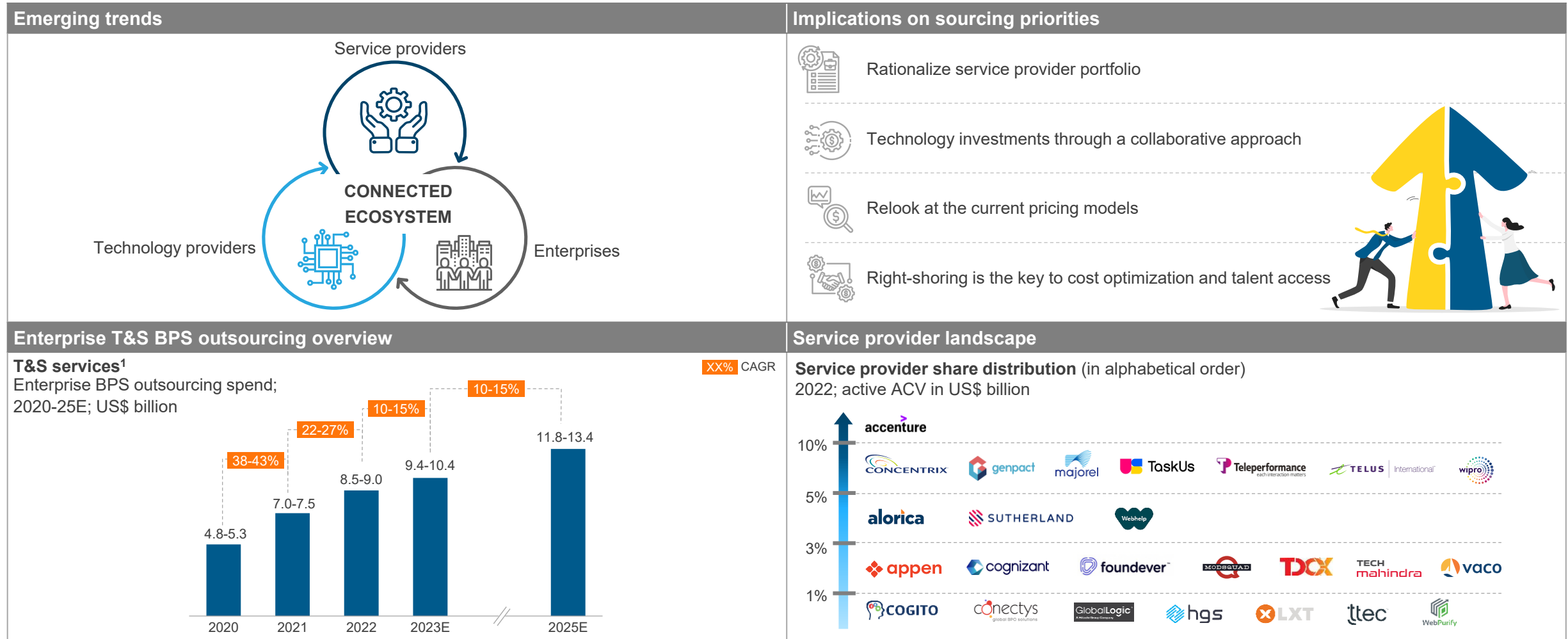
Enterprise T&S BPS outsourcing overview

- The T&S BPS outsourcing spend has shown a strong YoY growth of 22-27%, reaching US\$9 billion ; however, this growth rate is likely to be muted due to the economic downturn in the US and Europe
- North America remains the largest adopter of T&S services, while Europe has grown at a slow pace in the previous year due to the prevailing economic situation

Service provider landscape

- The top eight providers account for more than 45% of the market share in terms of ACV
- Accenture and Teleperformance are the Leaders in three major geographies, with TELUS International and Majorel joining them in two major regions
- Accenture and Genpact are the Leaders in the top three industries contributing to T&S spend

This study offers four distinct chapters providing a deep dive into key aspects of marketing services market; below are four charts to illustrate the depth of the report



Research calendar

Trust and Safety

Published Planned Current release

Reports title	Release date
Trust and Safety Services PEAK Matrix® Assessment 2023	March 2023
Key Tech Away: Technology Providers in the Trust and Safety Landscape	April 2023
Press Play on Player Experience: Level up Beyond Game Design	April 2023
Trust and Safety Services – Provider Compendium 2023	May 2023
Safeguarding Assets: Building Trust and Combating Fraud	July 2023
Augmented Intelligence: The Future of Trust and Safety (T&S) is Humans + AI	September 2023
Safety in Advertising	Q3 2023
Opportunities for Adoption of Generative AI Services	Q4 2023
Content Moderation in the Future	Q4 2023
R'AI'sing the Bar: The Enhanced Role of AI in Ensuring Safe Digital Spaces in the Future	Q4 2023

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