Trust and Safety Services PEAK Matrix® Assessment 2024

March 2024: Complimentary Abstract / Table of Contents

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- Market Vista™
- Microsoft Azure
- Microsoft Business Application Services
- Modern Application Development (MAD)
- Mortgage Operations

- Multi-country Payroll
- Network Services and 5G
- Oracle Services
- Outsourcing Excellence
- Payer and Provider Business Process
- Payer and Provider Information Technology
- Price Genius – AMS Solution and Pricing Tool
- Pricing Analytics as-a-Service
- Process Intelligence
- Process Orchestration
- Procurement and Supply Chain
- Recruitment
- Retail and CPG IT Services
- Retirement Technologies
- Revenue Cycle Management
- Rewards and Recognition
- SAP Services
- Service Optimization Technologies
- Software Product Engineering Services
- Supply Chain Management (SCM) Services
- Sustainability Technology and Services
- Talent Genius™
- Technology Skills and Talent
- Trust and Safety
- Value and Quality Assurance (VQA)

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Background of the research

The trust and safety industry has undergone significant changes, driven by the increasing volumes and diversity of content formats, the dynamic regulatory landscape online, and the need for nuanced regional content moderation services. Further, the demand for data annotation and AI support services has increased as enterprises continue to explore the use of generative AI for content creation and moderation.

Service providers are focusing on becoming strategic partners for enterprises and helping them solve their current challenges. The current trust and safety landscape has providers across multiple categories – IT/BPO, Contact Center Outsourcing (CCO) providers, and niche/specialist providers – who are gearing to serve the diverse needs of the market. Providers are adapting to meet evolving enterprise requirements through augmented offerings, technology investments, and partnerships. Additionally, they are expanding their delivery landscapes by identifying and investing in talent-rich regions to enable localized operations.

In this research, we present an assessment and detailed profiles of 27 trust and safety providers featured on the Trust and Safety Services PEAK Matrix®. Each provider profile provides a comprehensive picture of its service focus, through a snapshot of its key strengths and limitations, as assessed by Everest Group. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading trust and safety providers, client reference checks, and an ongoing analysis of the trust and safety services market.
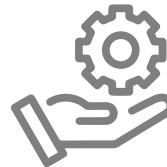
This report includes the profiles of the following 27 leading trust and safety providers featured on the Trust and Safety Services PEAK Matrix® Assessment 2024:

- **Leaders:** Accenture, Concentrix + Webhelp, Genpact, TaskUs, and Teleperformance
- **Major Contenders:** Alorica, Appen, Cognizant, Conectys, Foundever, GlobalLogic, ModSquad, Sutherland, TDCX, Tech Mahindra, TELUS International, transcosmos, TTEC, Vaco, WebPurify, and Wipro
- **Aspirants:** Cogito Tech, Foiwe, ICUC Social, IntouchCX, LXT, and Pure Moderation

Scope of this report

Geography
Global

Providers
27 trust and safety providers

Services
Trust and safety services

Overview and abbreviated summary of key messages

In this report, we present an assessment of trust and safety service providers featured on the Trust and Safety Services PEAK Matrix® and detailed service provider profiles that offer a comprehensive picture of their service focus through a snapshot of their key strengths and limitations, as assessed by Everest Group.

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

Trust and Safety Services PEAK Matrix® Assessment 2024

Everest Group classifies 27 trust and safety services providers on the Everest Group Trust and Safety Services PEAK Matrix® into three categories of Leaders, Major Contenders, and Aspirants

- Accenture, Concentrix + Webhelp, Genpact, TaskUs, and Teleperformance are the Leaders
- Major Contenders include Alorica, Appen, Cognizant, Conectys, Foundever, GlobalLogic, Modsquad, Sutherland, TDCX, Tech Mahindra, TELUS International, transcosmos, TTEC, Vaco, WebPurify, and Wipro
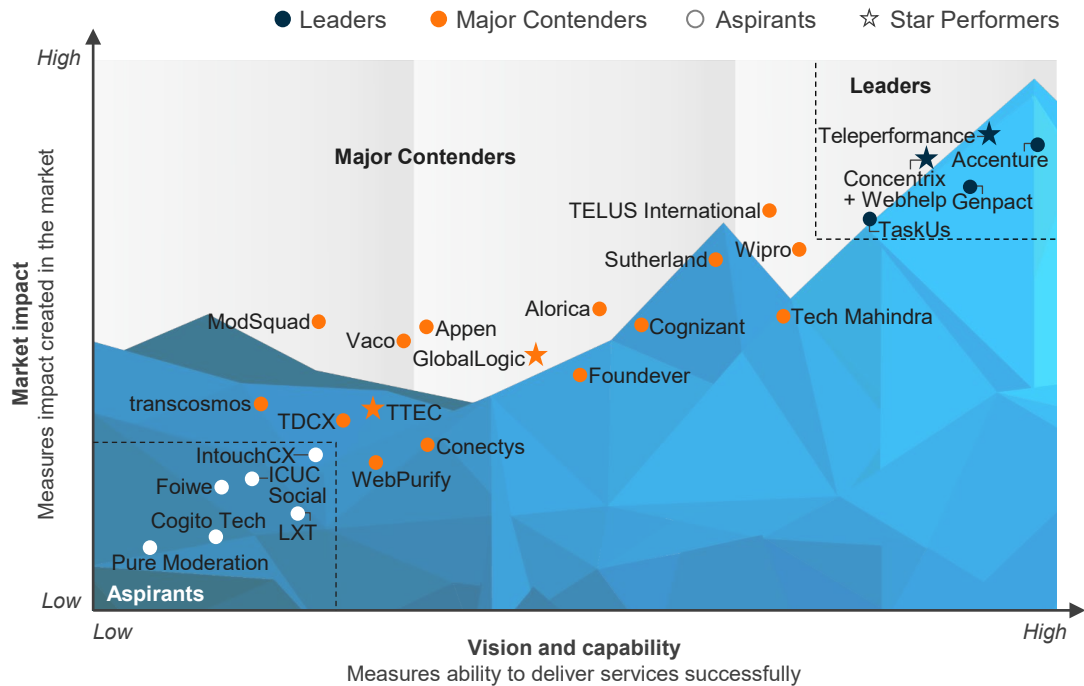- Cogito Tech, Foiwe, ICUC Social, IntouchCX, LXT, and Pure Moderation are the Aspirants

Everest Group also identified Concentrix + Webhelp, GlobalLogic, Teleperformance, and TTEC as the Star Performers. This recognition is based on these providers' relative year-over-year movement on the PEAK Matrix®.

Key insights on trust and safety services market

- The top nine providers account for 80-85% of the market share in terms of ACV
- Accenture, Concentrix + Webhelp, and Teleperformance are one of the leaders in three major geographies. TELUS International is a leader in two major regions
- Concentrix + Webhelp and Teleperformance are one of the leaders in five industries. Accenture and Wipro are leaders in three industries. Genpact and TELUS International are leaders in a couple of industries.

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

Everest Group Trust and Safety Services PEAK Matrix® Assessment 2024[1,2,3]

Illustrative example

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

Market impact — Measures impact created in the market (High / Low)

Vision and capability — Measures ability to deliver services successfully (Low / High)

Leaders: Teleperformance, Accenture, Concentrix + Webhelp, Genpact, TaskUs

Major Contenders: TELUS International, Wipro, Sutherland, Tech Mahindra, Alorica, Cognizant, Appen, ModSquad, Vaco, GlobalLogic, Foundever, transcosmos, TDCX, TTEC, Conectys, WebPurify

Aspirants: IntouchCX, Foiwe, ICUC Social, Cogito Tech, LXT, Pure Moderation

1 Assessments for Alorica, Appen, Cogito Tech, Cognizant, Foiwe, ICUC Social, ModSquad, Pure Moderation, and TELUS International 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 buyers
2 Analysis for Teleperformance is based on capabilities post its acquisition of Majorel
3 Assessment for Accenture and IntouchCX are based on partial primary inputs
Source: Everest Group (2024)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision and 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 and 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 has a balanced delivery presence across onshore and offshore locations, which allows its clients to access localized service delivery from these locations.

Limitations
- While Provider 1 has experience in serving the trust and safety needs of North America-based clients, its ability to serve buyers from APAC region remains untested
- It provides limited support in platform safety and content services. Hence, buyers looking to get end-to-end fulfillment of their trust and safety needs may not find its offering compelling

Research calendar
Trust and Safety Services

Reports title	Release date
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
Safeguarding Brand Reputation in the Digital Era	September 2023
Webinar Deck: The Evolved Trust and Safety Industry and What to Expect Next	October 2023
From Gatekeepers to Guides	December 2023
AI in the Driver's Seat	December 2023
R'AI'sing the Bar: The Enhanced Role of AI in Ensuring Safe Digital Spaces in the Future	January 2024
Webinar Deck: Impact Sourcing: Empowering Communities, Transforming Business, and Creating Long-term Impact	February 2024
The Morphing Face of Threats	February 2024
Trust and Safety Services PEAK Matrix® Assessment 2024	**March 2024**
Preserving the Ballot: The Role of Trust and Safety in Election Misinformation	Q2 2024
Trust and Safety Services – Provider Compendium 2024	Q2 2024
Regulations in AI	Q2 2024

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