Trust and Safety Services – Provider Compendium 2024

May 2024: Complimentary Abstract / Table of Contents

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Background of the research

The Trust and Safety (T&S) 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 T&S 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 T&S providers. Each provider profile provides a comprehensive picture of its scale of operations, recent developments and investments, T&S-specific technology solutions (including generative AI solutions), other technology capabilities, wellbeing initiatives, and delivery locations. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading T&S providers, client reference checks, and an ongoing analysis of the T&S services market.

This report includes the profiles of the following 27 leading T&S service providers: Accenture, Alorica, Appen, Concentrix, Cognizant, Cogito Tech, Conectys, Foiwe, Foundever, Genpact, GlobalLogic, ICUC Social, IntouchCX, LXT, ModSquad, Pure Moderation, Sutherland, TaskUs, TDCX, Tech Mahindra, TTEC, Teleperformance, TELUS International, transcosmos, Vaco, Wipro, and WebPurify

Scope of this report

Geography: Global

Provider: 27 T&S providers

Services: T&S services

Overview and abbreviated summary of key messages

Everest Group's Trust & Safety Services Provider Compendium 2024 provides accurate, comprehensive, and fact-based snapshots of 27 trust and safety services providers. The compendium will enable buyers of trust and safety services to understand the offering and assess the capabilities of different providers.

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

Trust and Safety Services PEAK Matrix® Assessment 2024

- Everest Group classified 27 T&S service providers on Everest Group PEAK Matrix® into three categories of Leaders, Major Contenders, and Aspirants

- Featured players include Accenture, Alorica, Appen, Concentrix, Cognizant, Cogito Tech, Conectys, Foiwe, Foundever, Genpact, GlobalLogic, ICUC Social, IntouchCX, LXT, ModSquad, Pure Moderation, Sutherland, TaskUs, TDCX, Tech Mahindra, TTEC, Teleperformance, TELUS International, transcosmos, Vaco, Wipro, and WebPurify

T&S service provider characteristics

- Leading providers are becoming strategic enablers for enterprises by supporting them beyond scale and proactively serving clients' evolving needs

- Providers are prioritizing the well-being of their workforce. Some are investing in developing in-house tools and partnering with technology providers, while others are offering workforce management tools

- Providers are building delivery presence across onshore, nearshore, and offshore locations to provide cost arbitrage to their clients and meet their requirements for localization

- Some providers have also emerged as strong regional providers and are increasing the scope of their services services

Key insights on trust and safety services providers

- The report provides an overview of each provider and any recent developments/investments made by them

- It provides insights on provider client portfolios, their key delivery locations, and their proprietary tools/solutions

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The Trust and Safety Services Provider Compendium 2024 has 27 provider profiles

Research calendar
Trust and safety services

Published   **Current release**   Planned

Reports title	Release date
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	May 2024
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Ordinance at the Gates: the Evolving Landscape of AI Regulations Around the World	Q2 2024
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