



Digital Experience Services

Content Transformation

Report Abstract

November 2023

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91 pages

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Who is This Market Analysis For?

NelsonHall's Market Analysis on Content Transformation is a comprehensive assessment of the market, designed for:

- Sourcing managers monitoring the capabilities of existing suppliers of CX services and identifying vendor suitability for CX services RFPs
- Vendor marketing, sales, and business managers looking to benchmark themselves against their peers
- Financial analysts and investors specializing in the CX Services sector.

Key Findings & Highlights

The global content moderation market is \$7.1bn, growing at 8.7% CAAGR through 2027. The global content creative services market is \$6.3bn (back-office activities), growing at 5.7% CAAGR.

The Content Moderation market is led by TELUS International, followed by Majorel, Teleperformance, Concentrix, Alorica, and Accenture.

Traditional trust and safety outsourcing drivers are scalability, improved accuracy and compliance, access to skilled talent, multi-shore delivery, and risk diversification.

The main challenges for adopting content moderation outsourcing are the demand for greater control of moderation technology and resources, including brand protection and de-prioritization of online safety.

Scope of the Report

The report is based on interviews with trust and safety providers and clients. It analyzes the worldwide market for Content Transformation and addresses the following questions:

- What is the current and future market for content moderation, trust and safety, and content creative services?
- What is the market size and projected growth for content moderation?
- What is the market size and projected growth for content moderation by geography?
- What are the top drivers for the adoption of content transformation services?
- What is the current content moderation market structure and vendor market shares, and how are these changing?
- What are the benefits currently achieved by content transformation clients?
- What factors are inhibiting client adoption of outsourced content moderation services?
- What are the main content transformation offerings provided by vendors?

- What is the current pattern of delivery location, and how is this changing?
- What are the current pricing mechanisms, KPI, and contract duration patterns, and how are these changing?
- What tools and frameworks are used by CX services vendors for domain delivery, and how are these changing?
- What are the main external technology partnerships used by CX services vendors, and how are these changing?
- What are content transformation selection criteria, challenges, and critical success factors?

About The Author

Ivan Kotzev is NelsonHall's Customer Experience (CX) Services Lead Analyst, with global responsibility for CX services research and client support.

Known for his keen analytical ability and knowledge of the latest developments in CX services delivery and transformation, Ivan assists clients worldwide in understanding and getting the most from CX services across areas including analytics, social media, omnichannel integration, and multi-process CX. Ivan is also a leading voice on how automation is revolutionizing the customer experience.

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About NelsonHall

NelsonHall is the leading global analyst firm dedicated to helping organizations understand the 'art of the possible' in digital operations transformation. With analysts in the U.S., U.K., Continental Europe, and Asia, NelsonHall provides buy-side organizations with detailed, critical information on markets and vendors (including NEAT assessments) that helps them make fast and highly informed sourcing decisions. For vendors, NelsonHall provides deep knowledge of market dynamics and user requirements to help them hone their go-to-market strategies. NelsonHall's research is based on rigorous, primary research, and is widely respected for the quality, depth and insight of its analysis.

We would be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager: Guy Saunders at guy.saunders@nelson-hall.com

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