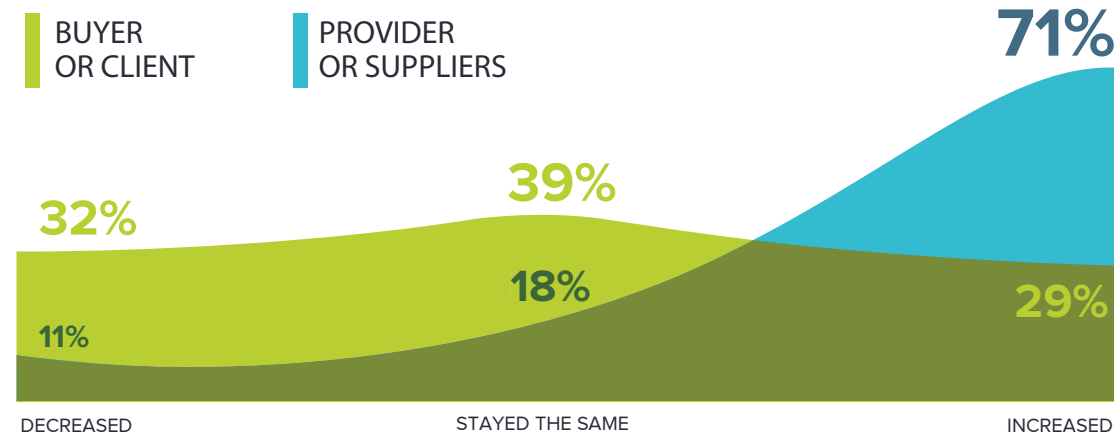


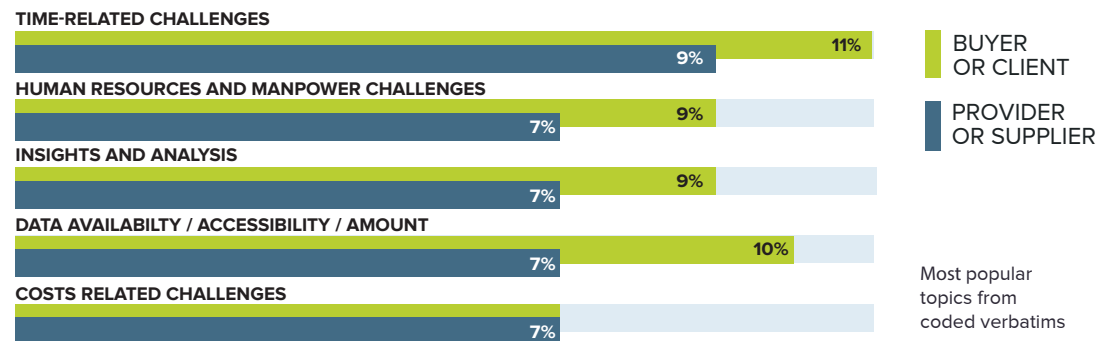
# EXECUTIVE SUMMARY

## BUSINESS OUTLOOK

The apparent disconnect between reported growth in client budgets and supplier revenue continues. We can only surmise that more companies are taking pieces from the same pies, but thankfully they continue to be large pies.



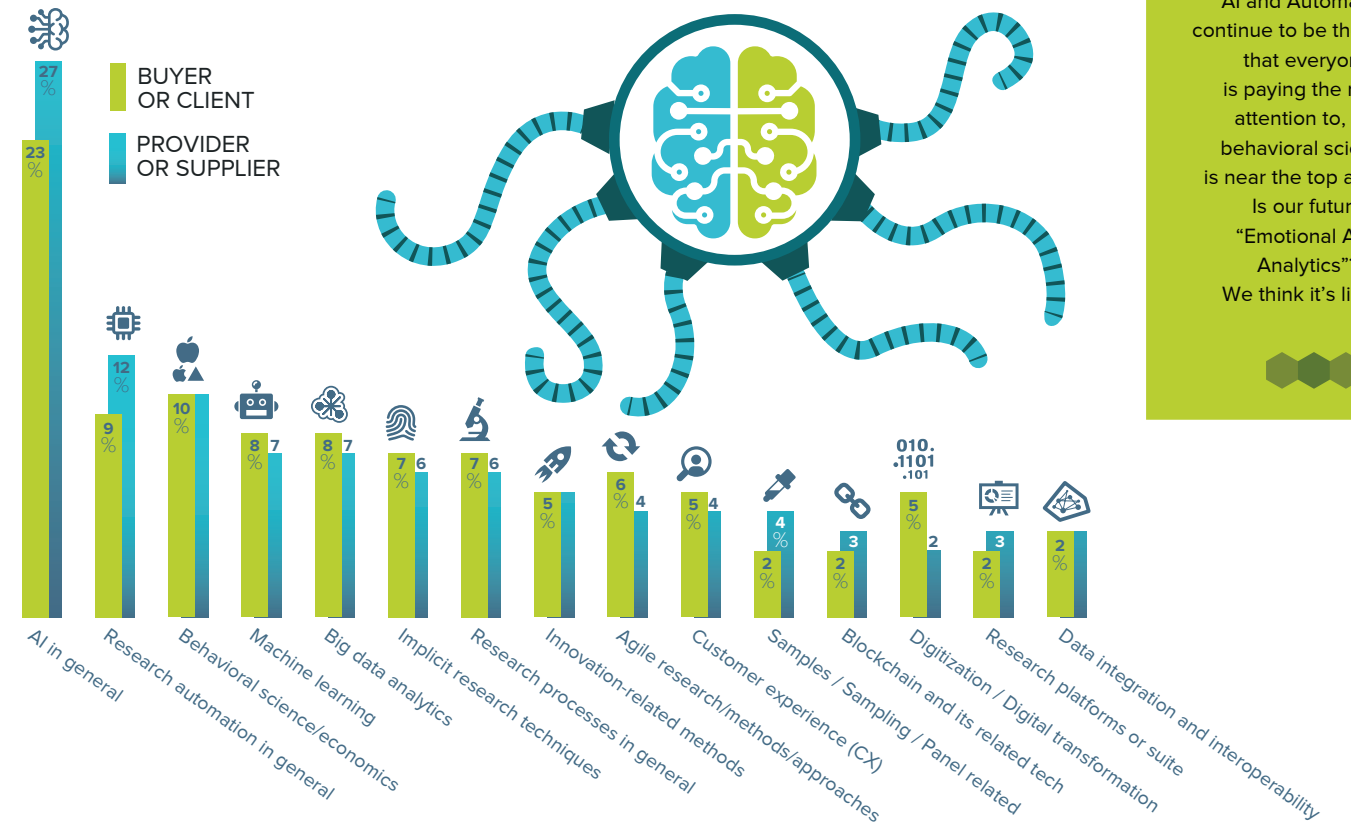
## TOP CHALLENGES



## MOST INNOVATIVE CLIENT LIST IS STABLE

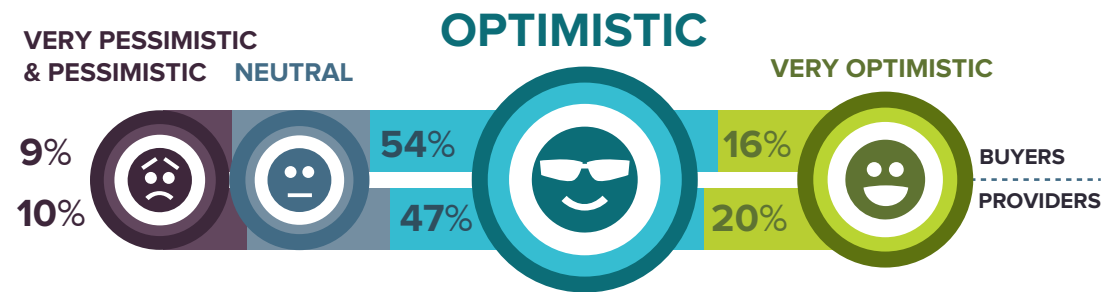


## BUZZ TOPICS: AI AND AUTOMATION STILL IN THE LEAD



AI and Automation continue to be the topics that everyone is paying the most attention to, but behavioral science is near the top as well. Is our future "Emotional AI & Analytics"? We think it's likely.

## OPTIMISM ABOUT THE INDUSTRY



The future's so bright, we gotta wear shades seems to be the prevailing sentiment for the industry, and in almost equal measure for both Buyers and Providers.

## SUPPLIER RANKING CONTINUES TO SHOW CHANGES

