



M.CASTTM

2027 TRENDS REPORT

The Human & Machine Economy

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M.Cast Trend Leaders



Terrie Ard

Partner, President & COO

[linkedin.com/in/terrieard/](https://www.linkedin.com/in/terrieard/)



Jordan Jacobs

Partner, Senior Vice President

[linkedin.com/in/jordanwilsonjacobs/](https://www.linkedin.com/in/jordanwilsonjacobs/)



Audrey Goff

Partner, Vice President, Client Development

[linkedin.com/in/audrey-morris-goff-a032826/](https://www.linkedin.com/in/audrey-morris-goff-a032826/)



Nanette Schimpf

Partner, Vice President

[linkedin.com/in/nanetteschimpf/](https://www.linkedin.com/in/nanetteschimpf/)



D'Arcy Toffolo

Partner, Associate Vice President

[linkedin.com/in/darcylynchtoffolo/](https://www.linkedin.com/in/darcylynchtoffolo/)



Liz Underwood

Partner, Associate Vice President

[linkedin.com/in/liz-shawen-underwood-850/](https://www.linkedin.com/in/liz-shawen-underwood-850/)



Emily Read

Partner, Executive Managing Director

[linkedin.com/in/emilywread/](https://www.linkedin.com/in/emilywread/)



Fern Senra-James

Partner, Executive Managing Director

[linkedin.com/in/fernsenrajames/](https://www.linkedin.com/in/fernsenrajames/)



Courtney Cox

Partner, Managing Director

[linkedin.com/in/courtneyecox/](https://www.linkedin.com/in/courtneyecox/)

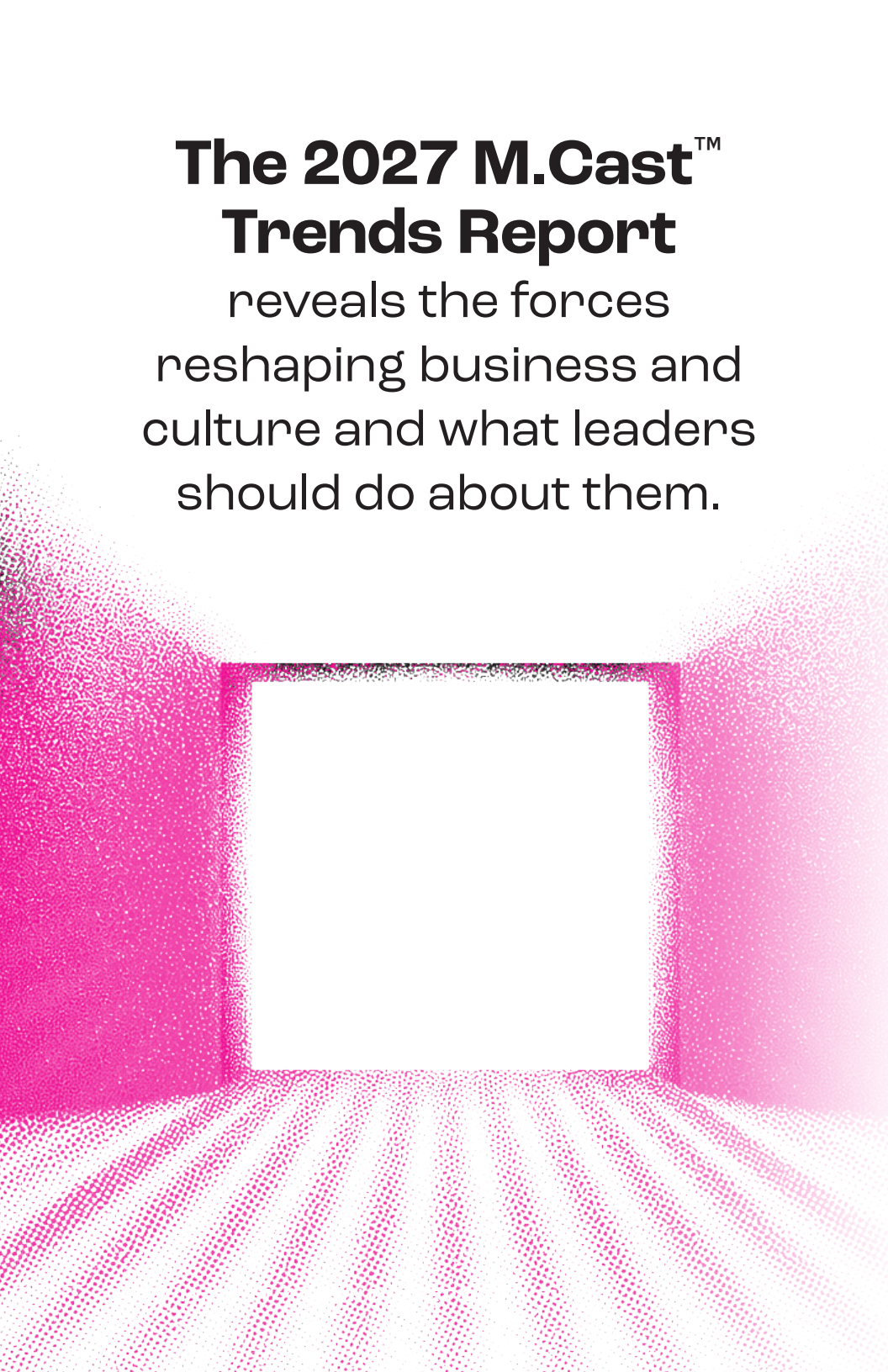


Executive Advisor

Karen B. Moore

Founder & CEO

[linkedin.com/in/karenbmoore/](https://www.linkedin.com/in/karenbmoore/)



The 2027 M.Cast™ Trends Report

reveals the forces
reshaping business and
culture and what leaders
should do about them.

2027 is an AI hinge year. AI moves into the middle. It stands between brands and their customers, between leaders and the public, between employers and the people they hire, and even between workers and their own thinking.

More of how your audiences find you, judge you, and choose you will run through a machine first. That makes 2027 a pivotal year for every organization that depends on being understood, chosen, and trusted.

When familiar signals fail, waiting for certainty means falling behind. Every leader now has to think like a futurist. Leaders must notice early evidence and act while the outcome can still be shaped, or get left behind.

Moore's M.Cast trend leaders have identified seven key trends and grounded each in current research. Trust now shapes how organizations lead, sell, and communicate so deeply that each trend carries its own Trust Factor. We've provided a focused look at what the shift demands of the trust you've built and the trust you still need to earn. Trust will become the operating system of growth, determining who gets believed, chosen, and recommended by both people and machines.

**Share these findings with your team and use them
to test your 2027 readiness to maximize what's next.**

The Orchestration Advantage: **Rise of the AI Conductor**

The Why

Think of AI integration like a musical ensemble. Until now, most organizations have focused on improving their overall performance by adding instruments and soloists: the tools and talent. Now, organizations are being challenged to take AI to new levels of integrated harmony by braiding AI systems that can plan, decide, and execute across entire workflows.

In 2027, success will require more than playing AI like single instruments. The new competitive edge is learning to conduct AI systems like a maestro.

How

Organizations are now building capacity to coordinate fleets of specialized agents effectively across operations. Deloitte finds **74% of organizations expect to be using AI agents** at least moderately by 2027, with 23% expecting to use them extensively. Gartner projects that by 2028, **at least 15% of day-to-day work decisions** will be made autonomously, up from zero in 2024.

By 2028, a third of enterprise software will ship with agentic AI built in. That's up from less than 1% in 2024.

Gartner projects more than 40% of agentic AI projects will be scrapped by the end of 2027 due to escalating costs, unclear value, and inadequate risk controls.

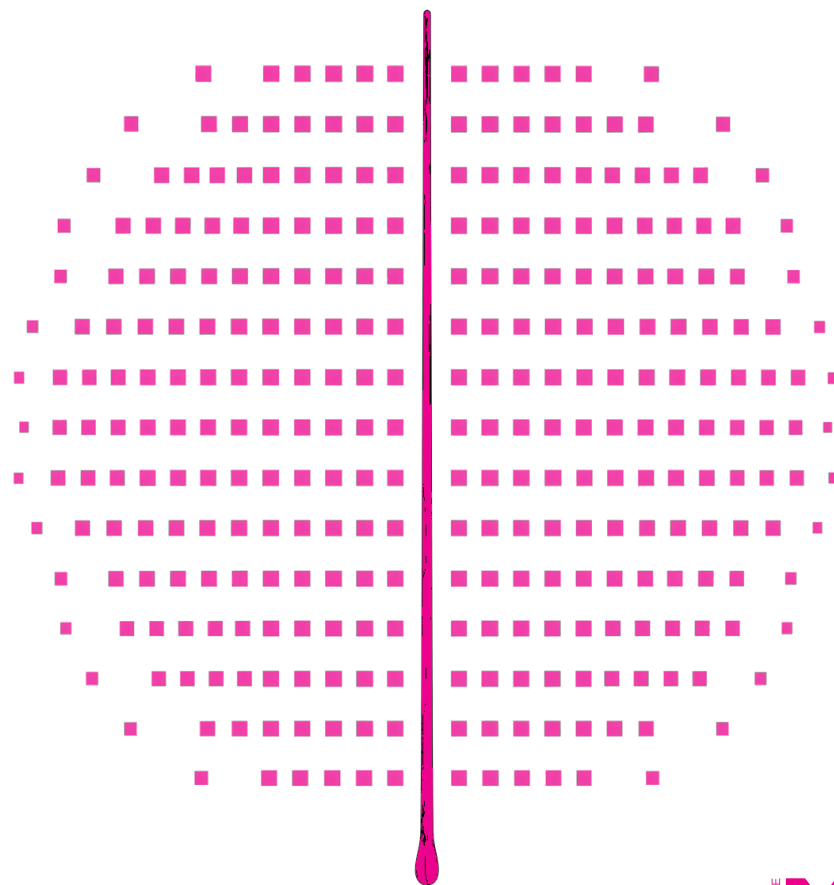
Microsoft's blueprint for the organizations of the future puts it plainly: "AI-operated, but human-led" — where employees become an "agent boss" who builds, delegates to, and conducts a team of agents. The AI orchestration trend will accelerate in two ways in 2027:

- **The Organizational Actor.** As AI tools lift heavier loads, they take longer. The length of task an AI can reliably complete has doubled roughly every seven months since 2019 and every four months since 2024. A two-hour agent is a productivity tool. A four-day agent is an organizational actor — one that needs governance, an oversight structure, defined autonomy boundaries, and human checkpoints.
- **The Control Plane.** Organizations will create central dashboards that sit above AI agents, letting people oversee what the agents are doing, set the rules they follow, and step in whenever something needs a human's judgment. This lets a company automate its routine work. People can shift from doing every task themselves to supervising and making the bigger decisions.

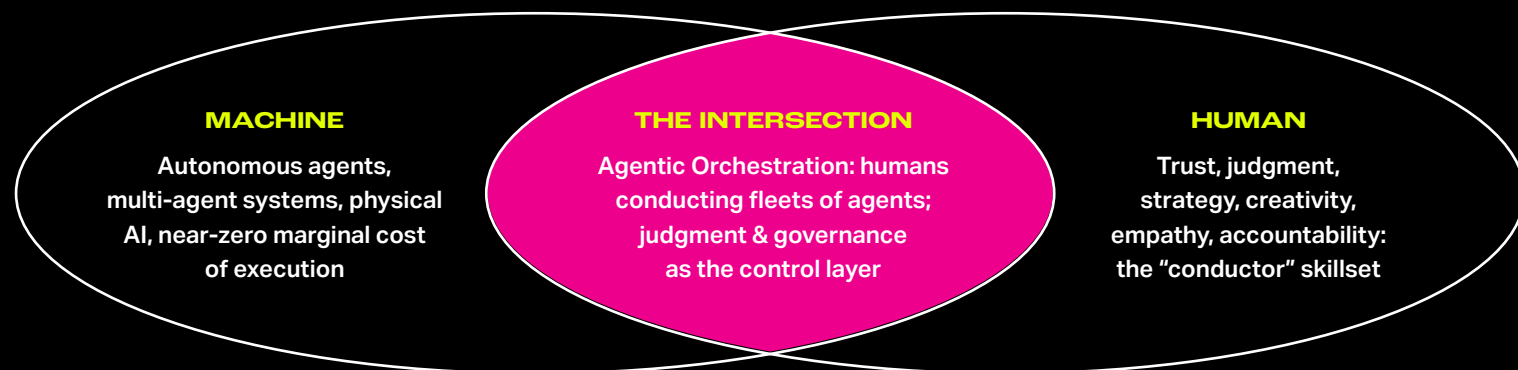
McKinsey estimates 75% of roles will need fundamental reshaping for AI.

Trust Factor

According to Deloitte, only 21% of respondents say their organizations have a **mature governance model** in place for agentic AI. Orchestration is more than an IT capability. It is a human leadership competency, with governance acting as the conductor's baton. The best musicians become so through hard work and consistent practice. Organization leaders must adopt a similar discipline, emphasizing that agents be directed with transparency, accountability, and in ways that hold up to regulatory scrutiny.



What's Next



Build the orchestration layer. Design end-to-end workflows around human-agent handoffs. Make governance a prerequisite. Reposition your people as conductors, moving them up to higher-order work — judgment, direction, and oversight — while agents take on execution. The bottleneck is leadership and work redesign, not employee readiness or technology access.

There is a window in 2027 where orchestration is a true differentiator. The advantage won't go to whoever adopts agents fastest, but to whoever learns to conduct them best. And the advantage compounds. Beyond 2027, the same skill extends to agent-to-agent commerce: low-cost AI concierges that negotiate with other agents around the clock and transact on our behalf, on decisions as big as home-buying or estate planning.

Conducting today's agents is how you get ready to conduct tomorrow's.



"In 2027, the smartest AI is the kind you can direct. The advantage no longer comes from having better tools. It comes from leading people and AI together. As AI agents become part of every workforce, the leaders who best combine human creativity, judgment, and empathy with AI's speed and scale will define what's next."

- Terrie Ard, President & COO

Verified Voices: The New Standard for Influence

The Why

Raising our voices for the causes we care about is one of the most basic ways people shape the world around them. We sign petitions, flood public comment periods, and rally our communities. We know when enough people speak, leaders listen and change follows. That collective voice has always been the raw material of influence.

In the age of AI, raw material can be counterfeited. Organizations are entering a reality where public sentiment, stakeholder feedback, and grassroots support can be manufactured, amplified, and shaped with speed and precision. The risk is even bigger than fake content: it's fake consensus. When AI systems can conjure the appearance of a movement before anyone confirms the people behind it are real, leaders may misread the moment and overcorrect, underreact, or act on pressure that was manufactured.

How

A sudden flood of comments, a wave of similar personal stories, a spike in advocacy activity — any of it may reflect genuine concern. Or it may reflect artificial coordination engineered to look organic.

This is no longer hypothetical. In early 2026, a [Los Angeles Times investigation](#) found that a California air quality district received roughly 20,000 comments — many more than usual — opposing a proposed pollution rule. The agency decided to check for authenticity and reached out to a small sample of 172 commenters, and several indicated they knew nothing about comments filed under their names, a strong sign the surge was manufactured.

Deloitte's 2026 Human Capital Trends research found that **48% of executives worry AI could introduce misinformation into their organization's data.**

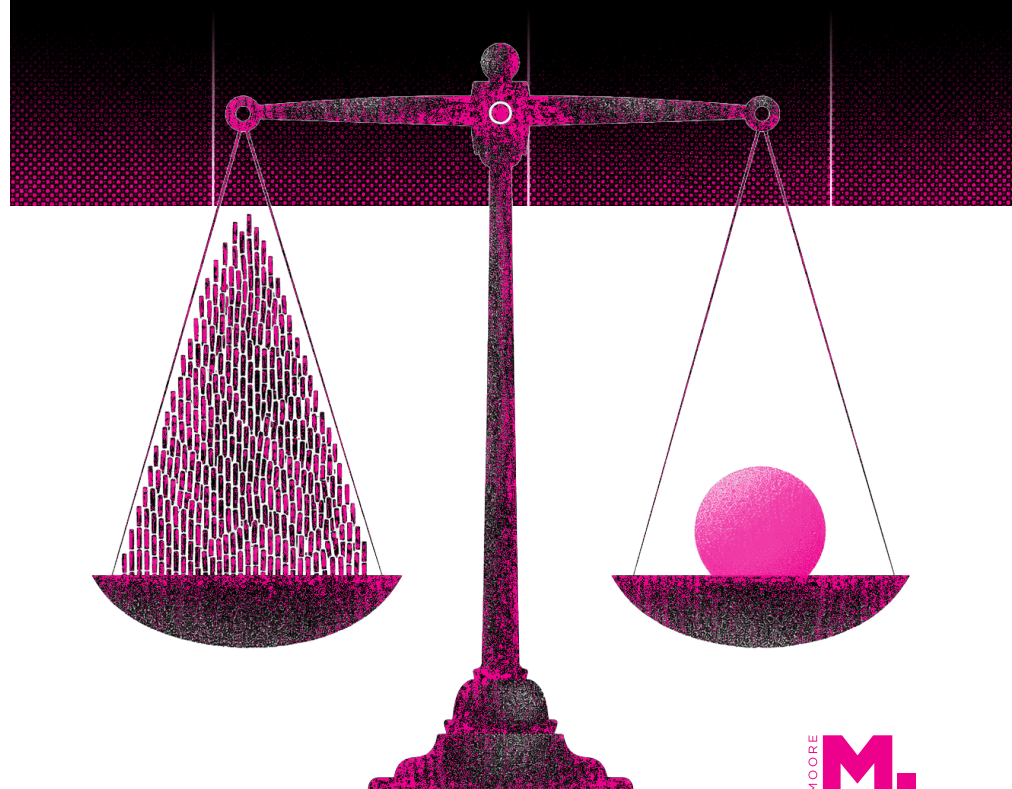
Researchers at [USC's Information Sciences Institute](#) modeled what a coordinated AI network might look like, running a simulated social platform populated entirely by bot agents. Even simple agents, they found, could "autonomously coordinate, amplify one another, and push shared narratives online without human control." It was a controlled simulation, but the lesson for leaders is plain: What works in the lab is a short step from the wild. When manufactured activity looks human at first glance, every public-facing issue — regulatory debates, economic policy, advocacy campaigns, brand reputation — becomes harder to trust.

Among every threat facing the world, the [World Economic Forum](#) ranks misinformation and disinformation the No. 2 global risk of the next two years.

As synthetic voices grow more sophisticated, authenticity becomes harder to prove and more valuable to protect. Detection tools will keep improving, but so will the fakes. The organizations that hold their ground will be the ones that can point to credible messengers, trusted relationships, owned channels, and a documented record of engagement that proves who stands behind their message.

Trust Factor

The threat is serious enough that governments are already responding: Gartner predicts that 40% of government organizations will establish "TrustOps" teams to counter deepfake threats by 2028. Synthetic voices do damage in both directions: A fabricated movement can be believed, and a genuine one can be dismissed as fake. Leaders must exercise discretion and care to avoid making mistakes on either side.



What's Next

Start with community. Build trusted networks before you need them. The organizations that can respond credibly under pressure are the ones that already have real relationships with the communities closest to the issue.

Create pathways for participation. Don't speak for your stakeholders when you can make space for them to speak for themselves. Standing advisory councils, community roundtables, and verified stakeholder panels give you a documented record of who was consulted, what they said, and how it shaped your strategy. And don't underestimate the power of face-to-face: When almost anything online can be manufactured, presence is the one signal a synthetic voice can't fake.

Validate before you react. Reactive advocacy has its place, but speed without verification is its own risk. Build a protocol that watches patterns: Manufactured activity tends to arrive in bursts, echo the same phrasing, and amplify itself on an unnatural clock. Behavioral and network-analysis tools like Cyabra and ZeroFox can surface those signals at scale. Don't lean on AI-text detectors to make the call; they're unreliable, and a false positive means dismissing real people as bots.

"As AI makes it easier to replicate voices and manufacture authenticity, organizations can no longer treat this as a future concern. Understanding, mitigating, and preparing for this risk should be a standard component of every crisis communications plan."

- Liz Underwood, Partner & Associate Vice President

"Authentic influence is built long before a moment of pressure. In a world where AI can manufacture momentum, long-standing trust becomes the foundation. Organizations that have invested in their reputation, credible messengers, and real community relationships will have proof points no algorithm can fake."

- Courtney Cox, Partner & Managing Director

Out of Sync: **Life Stages Are Losing Their Timing**

The Why

For the past century, life ran in a tidy sequence: learn, then earn, then retire. We built everything around it: education structured for the young, retirement accounts planned for the old, hiring pipelines, mortgages, and entire marketing playbooks to support them all. That schedule is quietly fraying. Young adults arrive at milestone moments later, delayed by debt and housing costs. Older adults stay in the workforce longer or come back, some pushed by necessity, some pulled by purpose.

The institutions meant to serve people across their lives were built for a timeline many people no longer follow. Simultaneously, the technology meant to modernize those institutions is quietly hard-coding the old model. The result is a widening gap between how people live and how every system built to serve them assumes they do. Leaders who invest in understanding the realities behind increasingly individualized life paths will be better positioned to attract talent, earn customers, and build lasting relationships.

How

By around **2029**, for the first time in U.S. history, adults 65 and older are projected to outnumber children under 18. For years after, more workers will leave the labor force than enter it. But just as organizations need experienced workers more than ever, their systems are quietly screening those workers out. Roughly **two-thirds of workers over 50** say they've seen or experienced age discrimination, and more than one in five feel they're being forced out because of it.

For the first time in U.S. history, adults 65 and older are projected to outnumber children under 18 around 2029. (U.S. Census)

AI screening tools are now standard infrastructure, trained on decades of hiring data. Researchers have documented significant **racial and gender bias** in AI resume screening. Now, age bias is being tested in court: A federal judge has allowed a nationwide collective action to proceed **alleging that Workday's hiring software prevented people over 40 from getting hired.**

A similar timeline collision shows up where Millennials and some Gen Xers now sit — squeezed from below by delayed milestones and from above by aging parents who need care. Nearly half are part of the "sandwich generation," supporting children and parents at once. They didn't fall behind so much as arrive out of order, on a foundation too thin to absorb the shock.

78% of employees say balancing work and caregiving raises their stress at work, yet fewer than half have ever told a manager. (Care.com)

In the meantime, personalization engines keep optimizing for a 35-year-old who finished school, bought a house, and started a family on schedule — a customer who no longer exists at scale. The distinction most systems can't make is why someone is off the old timeline. For example, the systems can't tell older adults who work by choice from those who can't afford not to, so they serve neither cohort well.

Trust Factor

Trust breaks fast when a system gets someone's story wrong. People extend loyalty to institutions that see their actual circumstances and priorities instead of an average data point that has shifted.

What's Next

Whether you're recruiting, selling, or communicating with an audience, one truth holds: Understand what your audience values, and you earn their loyalty. Knowing what they truly value becomes the center of the opportunity versus age and life stage predicting what people want. Start with three moves:

- **See the people the systems miss.** Your automation screens out capable applicants and loyal customers before a human ever looks. Pressure-test hiring and personalization systems for age bias, not just the race and gender bias that gets more scrutiny.
- **Segment by value, not age.** Retire the life-stage brackets and group people by the needs and behaviors that actually predict what they want.
- **Communicate to circumstance, not assumed choice.** Some people didn't choose to be off schedule, so a message that celebrates the choice will alienate them. It's better to let people signal where they are than to infer it from their age. Then speak to the range, not the average.

"People are pursuing education, careers, caregiving, major purchases, and retirement on increasingly individualized timelines. Leaders should strive to understand what matters to people now, meet them where they are, and build experiences, workplaces, and brands that reflect new realities."

- Emily Read, Partner & Executive Managing Director

Cognitive Debt: **When We Let the Machine Do the Thinking**

The Why

AI promised to free our minds. But a price has been quietly accruing, and in 2027 the cost increases. As individuals hand more of their thinking to machines, the mental muscles they stop using weaken. Skills like critical thinking, memory, and the capacity for hard judgment suffer. As AI use spreads, more people are taking on this cognitive debt. Early research shows heavy AI users think less deeply and struggle to recall work they supposedly produced. Researchers even have a name for it now: “AI brain fry,” the mental fatigue that comes from overseeing AI. In 2027, both the number of people experiencing it and the cost they feel will climb.



How

Cognitive offloading isn't new; calculators and GPS have long handled our arithmetic and navigation. But some individuals are now offloading judgment itself — analysis, synthesis, decision-making, and the hard cognitive work that used to define expertise. Generative AI often hands back an answer so fluent that some users opt not to thoroughly review.

AI output that looks polished but says nothing, often called “workslop,” costs a 10,000-person company roughly \$9M a year. 40% of workers say they receive it monthly. ([BetterUp Labs](#))

The science is now measuring the drain. An MIT Media Lab study titled [“Your Brain on ChatGPT: Accumulation of Cognitive Debt”](#) used EEGs to study AI-assisted writers. It found “LLM users consistently underperformed at neural, linguistic, and behavioral levels” and “these results raise concerns about the long-term educational implications of LLM reliance.” A [separate study](#) found a strong negative correlation between frequent AI use and critical thinking. The effect was worst among the youngest users, who should be building judgment muscle for their future careers.

Workers who use AI to replace routine, repetitive tasks report 15% lower burnout. ([BCG](#))

Researchers define AI brain fry as “mental fatigue that results from excessive use of, interaction with, and/or oversight of AI tools beyond one’s cognitive capacity.” Symptoms include mental fog, difficulty concentrating, information overload, slower decision-making, constant context switching, and a persistent sense of cognitive exhaustion from managing AI-generated work.

AI brain fry is different from burnout, the chronic emotional exhaustion that builds from sustained workplace stress. The same study found AI can, in fact, lower burnout when it clears away routine toil. But workers deepest in AI oversight showed 33% more decision fatigue, a 39% higher intent to quit, and more serious errors.

42% of workers who receive AI-generated filler trust the sender less afterward. ([BetterUp Labs](#))

Trust Factor

This trend turns on trust, and that trust runs in three directions. Most workers are anxious AI will leave them behind; they need to trust that leaders are advancing AI with them, not over them. That means being honest about what’s changing and visibly valuing their well-being. Leaders, in turn, must trust their people to exercise the judgment the machine can’t. And all of us need to be wary of fully trusting AI outputs.

What’s Next

The winning organizations in 2027 will continue to deploy AI while protecting the minds that direct it. Cognitive fitness becomes a shared responsibility across leadership, HR, wellness, and professional development. The edge goes to the organizations that keep human judgment sharp while pressing their advantage in AI.

Where Cognitive Debt Builds and How to Pay It Down

Every pressure that builds cognitive debt carries a human cost, and every cost has a response.

The Cause: What's Driving the Debt	The Effect: The Human Cost	The Response: Protect the Minds
Judgment itself offloaded, from analysis to synthesis to decisions	Critical thinking atrophies from disuse	Professional development: Teach people to think before they prompt; train them in problem framing and knowing when to stop iterating
Fluent output accepted without checking	Colleagues downstream pay for it in rework and lost trust	HR & talent: Reward judgment, not output volume; track rework and review cycles as business risk
Always-on oversight of too many tools and agents	AI brain fry: 12% more mental fatigue, 19% more information overload	Wellness: Cap continuous oversight time; protect AI-off deep-work windows HR: Productivity dips when workers use more than three tools simultaneously, so set a limit
The most productive people absorb the most oversight	They become the highest flight risk with 39% higher intent to quit	Wellness: Check on the heaviest AI oversight users first
Every hour AI saves is immediately reclaimed	No time to check the work; employees hear "do more" and strain climbs	Leadership: Let some of the time AI frees up stay with the people doing the thinking; don't rush to backfill what someone just automated
Teams left to navigate AI alone	Fatigue runs higher across the organization	Leadership: Coach adoption — managers who answer their team's AI questions cut fatigue; make work-life balance a stated value, tied to 28% lower mental fatigue
Early-career workers split: some delegate to AI, some build with it	Left to chance, the delegators never develop senior judgment skills	Professional development: Rotate juniors through think-first assignments

Data sources: [BCG](#), [BetterUp Labs](#)

"We go faster with AI precisely because we protect the thinking. Advance the machines and protect the minds. Do only one, and you've already lost the next decade."

- Terrie Ard, President & COO

"A machine can't hand a young professional judgment skills. Growing it deliberately is an investment worth making."

- Nanette Schimpf, Partner & Vice President

Made by People: **The Edge in the Age of Infinite AI**

The Why

In 1969, Seiko's quartz watch arrived, and it was cheaper and more accurate than anything previously made. The Swiss watch industry nearly didn't survive; roughly two-thirds of Swiss watchmaking jobs disappeared between 1970 and 1984. The prestige end of the Swiss industry survived by making mechanical watches scarce on purpose: hand-finished, limited, and positioned as heirlooms. Today, a Patek Philippe can sell for hundreds of thousands of dollars while some claim it keeps worse time than a \$20 quartz. Buyers aren't paying for accuracy. They're paying for not only the status of owning something scarce, but also the human hours behind it and the story it carries.

That is the pattern generative AI is about to repeat across the economy. For decades, competitive advantage came from producing more — more content, more analysis, more reach. Now, high-quantity output is both instant and infinite. While that tier of performance suffices in certain circumstances, discerning organizations and consumers want to know a human is behind the work. The premium now belongs to humans based on their craft, judgment, and accountability.

How

Sometimes, the human premium is credited to personal accountability. For example: Machine translation is free and fast, yet courts, hospitals, and immigration offices still require certified human translation for their documents. The value isn't the words; it's the responsibility attached to them. Did a person look before a patient hears the results? Can a citizen trace information back to who approved it? Accountability is what matters.

In other cases, the human premium is based on creativity and craft. Even a decade ago, shoppers paid about **17% more for handmade goods than machine-made ones**. Today, work is often perceived as less valuable once people know AI made it. In one **controlled study** of AI-created music, listeners couldn't tell the difference and even slightly preferred the AI tracks. But once they were told AI had made the compositions, they appreciated it less and were less willing to pay for it. That instinct is shaping brand preference: **Half of consumers now say they'd rather give their business to brands that don't use GenAI in their consumer-facing messaging, content, or advertising**. Organizations can remain relevant by ensuring AI-generated information has human oversight of the work.

Just 5% of organizations consider themselves leaders at blending human and AI decision-making, even as 60% of executives now use AI regularly. (Deloitte)

But accountability, creativity, and craft aren't the whole of it. Knowing a person is behind the work creates a feeling of connection. In a world of infinite synthetic output, people increasingly crave the sense that a real human is on the other side. There's emotional value in knowing someone chose to make this, and they meant it for you.

As consumer skepticism grows, 68% of people frequently question the authenticity of the content and information they see. (Gartner)

Trust Factor

At enterprise scale, the "human premium" becomes something you have to prove. It isn't about proving that a human participated; it's proving that a human is accountable. What earns trust is the ability to answer three questions: Who created it? Who reviewed it? Who owns the outcome?

Trust runs both ways: Audiences must believe a human is answerable, and leaders must trust their people to make the calls a machine can't.

What's Next

The human premium concentrates wherever judgment, consequence, and connection matter most. For leaders, the opportunity is to design those moments.

- Map where human judgment actually changes your outcomes, and staff them deliberately.
- Build the systems that can answer those three questions. (Who created it? Who reviewed it? Who owns the outcome?)
- Treat "made by people" as a provable feature of your brand.

We spent the last decade optimizing for speed. The next decade belongs to organizations that know when speed should give way to the human — the craft, the judgment, and the person willing to put their name on the work.

"The companies that win won't be those that think they can economize by eliminating human effort. They'll be the ones that know where human judgment creates the most value, and they will design their systems around it."

- Jordan Jacobs, Partner & Senior Vice President

"Even as machines take on more of the work, people still want to be at the center of their own ingenuity and contributions. They crave ownership, purpose, and the sense that the ideas and outcomes are truly theirs."

- Fern Senra-James, Partner & Executive Managing Director

The Simple Button: **Optimized for Machines, Chosen by People, Built for Trust**

The Why

Over twenty years ago, a red plastic button labeled “easy” became a desk toy and a shorthand people still reach for. Who couldn’t relate to the desire for life and work to feel less hard? Now, AI is delivering more than the easy button. It’s delivering the simple button. Consider how a Google search has evolved. Not long ago, a query returned links for further exploration. Today, it returns an AI-generated answer that suffices most of the time.

This has big implications for brands, which have long worked to build direct relationships with customers: to earn attention, to make their case, and ultimately to be chosen. This two-sided effort between brand and consumer created a kind of relationship. Now, AI-powered simplification stands in the gap and does the work of choosing on the customer’s behalf. And the relationship goes where the effort goes: to whoever does the simplifying.



How

This relationship erosion is further along than it looks. A decade ago, fewer than half of U.S. Google searches ended without a click; today, about **two-thirds do**. News publishers are also feeling the hit. According to **Reuters Institute**, ongoing rollout of both AI Mode and AI Overviews to Google's search experience is widely assumed to be affecting referral traffic to news websites. Google's organic traffic to news sites fell by a third in a single year, and publishers expect it to almost halve again within three years. The reader still gets informed, but the newsroom doesn't get the click — or the relationship.

Commerce is a few steps behind and on the same path, but with a twist. According to **Adobe's numbers**, AI-referred shoppers generate more revenue per visit (+53%) than non-AI traffic, a massive swing from just 12 months ago when non-AI visits were worth 128% more. In this case, the mediated customer is no longer a lower-quality customer.

Less interaction with customers has wide-ranging impacts. If the customer doesn't land on your site, then their data-rich visits, queries, and sign-ups stop arriving. If the machines can't see your organization, you get skipped. If nothing sets you apart, you get picked only when you're cheapest. When customers stop coming to you directly, you start paying whoever they go through instead, diminishing your margins. You'll pay commissions to marketplaces, fees to delivery apps, and advertising dollars to search.

And this raises a harder question: How does a brand get chosen inside an AI answer? Winning the machine works nothing like winning the consumer. Machines don't read minds; they read records. Your standing gets assembled from what credible third parties say about you, rather than from the impression you made. Borrowed authority replaces earned authority.

The market is already pricing that in. Outside sources are valuable enough to the machines that platforms now buy them outright: **Amazon pays** The New York Times up to \$25 million a year to put Times journalism inside Alexa and other Amazon products. And brands are taking note that AI answers get built from what's already written. With LLMs replacing traditional search, **Gartner** predicts that PR and earned media budgets will double by 2027.

Trust Factor

Underneath all of this sits a question about trust, and it's older than the technology. Sociologists have long argued that trust exists to reduce complexity: We trust so we can stop evaluating. That has always been a brand's real work. A trusted name is a shortcut that spares people the effort of choosing. AI now does that job for everything at once, which is why people hand it their trust so readily.

So here's the imperative: Build a record worth citing. The machines look for a record of what others have said about you. Make sure there's one worth finding. Also, the record has to be real. AI systems keep getting better at catching fake reviews and gamed profiles, which makes honesty the only version that lasts.

What's Next

The brands that win in 2027 will be legible to the machine and unmistakably human everywhere else.

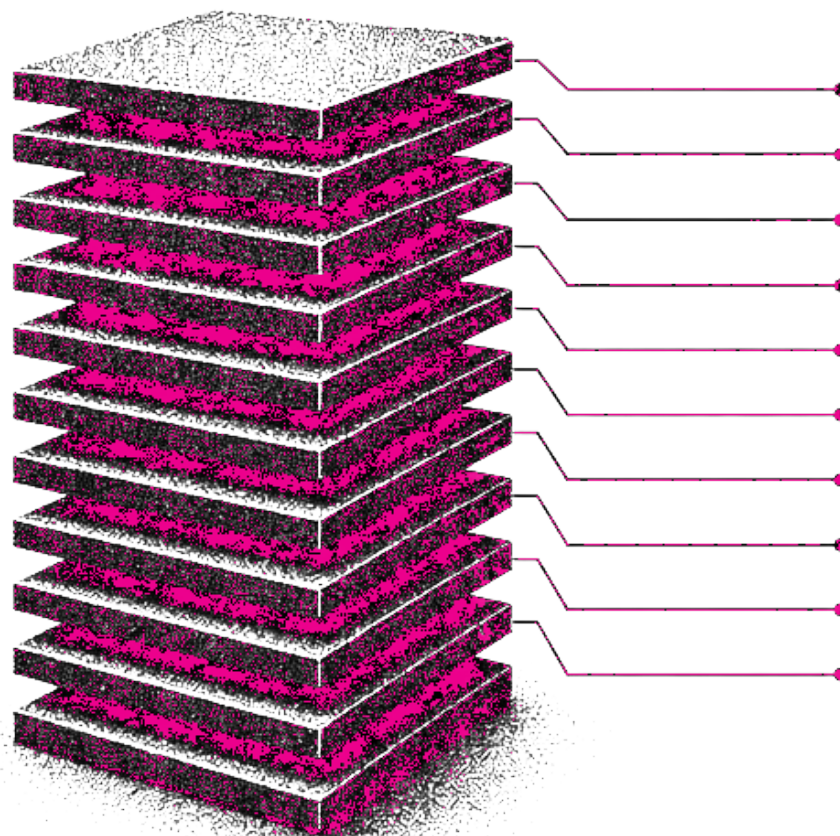
Start by looking. Find out what AI answers say about your brand today, and have your team pull the same for your two closest competitors so you have a comparison. Then ask your people how they made their last three purchases or picked their last vendor. Listen for how many took the simple answer instead of doing more research.

Make yourself visible to the machines. Start with your website, where you have the most control and where the gap is already measurable. (Adobe puts a score on this: The average retail product page rates 66% readable by machines.) But the machines read well beyond your site. Reviews, profiles, directories, and forums feed the answer too, alongside the expertise and press coverage you earn. All of it counts only if it's online where the machines can find it.

Protect the human moments. Some decisions carry too much weight to hand to a machine. Map which ones those are for your customers, and put your best people there.

Signal	Where it Stands
Search	68% of US Google searches now end without a click. For every 1,000, only 276 reach the open web.
News	Google's organic traffic to more than 2,500 sites fell 33% globally and 38% in the US in a single year. Publishers expect a further 43% decline over the next three years.
Commerce	In July 2026, AI-referred shoppers at U.S. retail sites converted 60% better than other traffic. AI-driven retail traffic was up 62% year over year.

Sources: [Similarweb](#) | [Reuters Institute](#) | [Adobe](#)



"The brands that win will do two things at once: optimize their digital footprint to be picked by the machines and remain unmistakably human to build trust and loyalty."

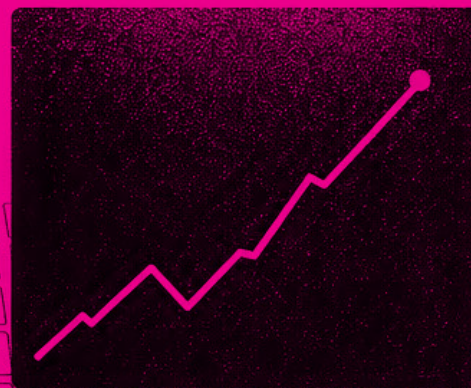
- Audrey Goff, Partner & Vice President

Intent Intelligence: The Metric That Matters Most

The Why

Through answer engines and generative search, AI is changing how audiences discover, evaluate, and act on information. As it does, the metrics leaders have leaned on for a decade are losing their grip. Accenture finds 54% of people usually get everything they need from the AI summary, and two-thirds now use AI search weekly. Measuring “did we get the click?” tells you nothing about whether the story that reached your audience was even yours.

The click, the impression, and the shared dashboard were built for a world where the customer journey was visible and traceable. That clear line of sight is fading. In 2027, organizations must respond by going back to the basic question: What, specifically, are we trying to change? The answer becomes the top rung of a new customized framework for the customer journey.



How

For a century, marketers have pictured the customer journey as a funnel. It's wide at the top and narrow at the bottom; prospects pour in and filter down to the buyers. Standard frameworks measure it by counting how many people reach each stage, but AI is draining these metrics of meaning. This moment calls for a new shape: The Influence Ladder.

54% of people say they usually find everything they need in the AI summary; two-thirds now use AI for search weekly. (Accenture)

Picture influence as five rungs. You set your sights on the top rung — the change you want to create — and climb toward it, letting that goal define every measure below.

Delivered → Seen → Noticed → Remembered → Acted On

- **Delivered.** Your message landed where it was meant to: the page, the feed, the inbox.
- **Seen.** It actually rendered on a real person's screen or other channel.
- **Noticed.** It won at least a genuine sliver of attention.
- **Remembered.** It left a trace that outlasts the moment.
- **Acted On.** It changed what someone did through a purchase, a choice, a recommendation, a shift in behavior.

Nearly one in three marketers already name measuring effectiveness across channels as their single biggest challenge. (BCG)

Most organizations measure the bottom two rungs and stop there. In the old funnel, that was enough: A click stood in for interest, so what happened at the bottom let you infer what was happening at the top. AI breaks that shortcut. The middle of the journey now happens inside answer engines you can't see, so guessing no longer works. You have to measure the top of the ladder directly.

That's the job of a customized measurement framework. Think of it as a system for defining, capturing, and valuing outcomes — a system shaped by an organization's mission and business model, as well as the decisions it needs to make. The framework comes down to four parts:

- **Outcome definition.** Choose three to five real-world changes that count as success, such as behavior change, policy movement, enrollment, donor retention, trust recovery, etc.
- **Signal selection.** Set obtainable indicators that credibly move with those outcomes, including the qualitative and non-digital signals most standard frameworks throw away.
- **Value weighting.** Agree on what each outcome is worth relative to the others. This step is especially helpful if budgets tighten.
- **Decision cadence.** Establish rhythm of reviewing the data and decision rules in advance — what gets scaled, paused, or reallocated, and when. A framework with no decision trigger is just a report.

Organizations that engage in public affairs, advocacy, and regulated industry sectors like healthcare already have deep experience in this. In advocacy campaigns, behavior-change communications, and public sector programs, a click can no longer be the proxy for "did anything actually change?" The organizations that have had to prove behavior change, not just reach, are the ones with a head start on where every marketer is heading.

Leading marketers are twice as likely as their peers to embed AI into the core of their measurement approach. (BCG)

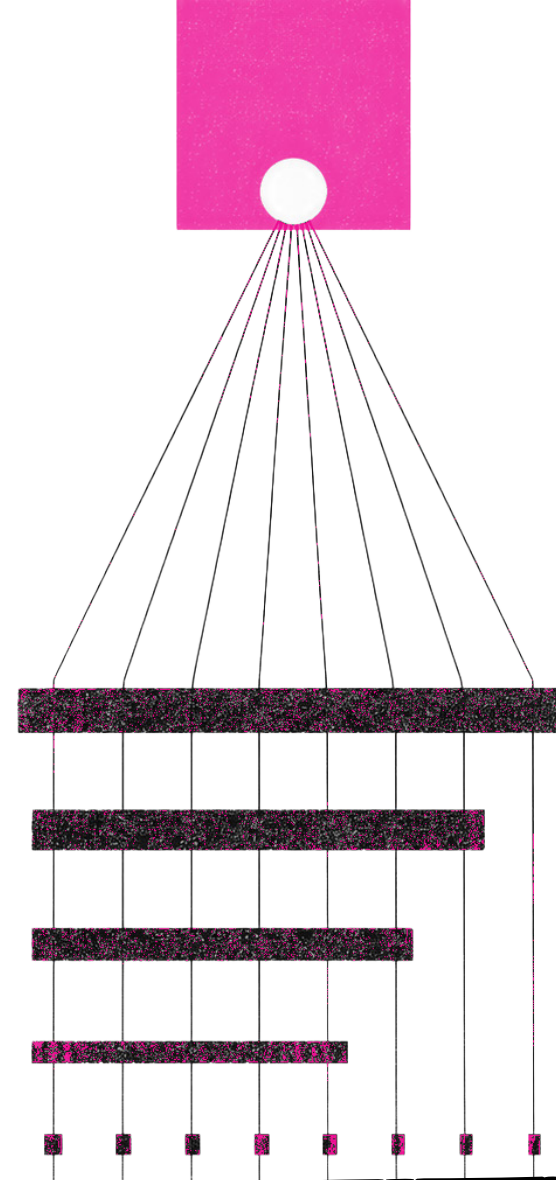
Trust Factor

New measurement creates an advantage only if people trust it enough to act. Trading the metrics everyone shares for a customized framework means giving up a quiet reassurance — a number the whole industry recognizes — and asking leaders to steer real decisions by attention scores and simple tests instead. That trust runs two ways: Teams have to report what's true, not just what flatters the work. And leaders have to act on an honest number even when it disappoints, rather than retreating to vanity metrics. Build that trust, and you climb the ladder faster.

What's Next

Before a campaign, decide which rung it's really for — to be noticed, remembered, or acted on. That choice shapes both the work and what you measure. Use attention data, quick brand surveys, and simple tests to measure the top rungs. Then add those measures to the dashboard you already run. Each rung calls for a different measure, and the higher ones are both more valuable and harder to discern:

- **Delivered and Seen.** The ads and emails you send still track easily, but in AI search, your content can reach someone with no click and no impression to count. New measures must be added to determine whether your brand actually shows up in this new AI landscape. There's a young, crowded cohort of AI-visibility or generative engine optimization tools to try.
- **Noticed.** Here you measure attention: whether people actually looked, and for how long. New standards from the Interactive Advertising Bureau (IAB) in collaboration with the Media Rating Council (MRC) make attention something you can track with more confidence.
- **Remembered.** Here you measure what stuck. Short surveys can tell you whether people remember your brand after seeing your work, and a rise in people searching for you by name is another sign it stayed with them.
- **Acted On.** Here you measure what people did. The cleanest way is a simple test: Show the work to one group, hold it back from another, and compare what each group does.



"For a decade, marketers measured what was easy to count. Given the accelerated transformation of marketing in the era of AI, the new focus must be on the metrics at the top of the ladder: whether people remembered and acted."

- D'Arcy Toffolo, Partner & Associate Vice President

2027 M.CAST TRENDS REPORT TEAM

EXECUTIVE LEADERSHIP & STRATEGY

Terrie Ard, President & COO

TerrieA@themooreagency.com

Candide Mullin, Managing Director

CandideM@themooreagency.com

TREND LEADERS

Terrie Ard | Jordan Jacobs | Audrey Goff | Nanette Schimpf | D'Arcy Toffolo | Liz Underwood

Emily Read | Fern Senra-James | Courtney Cox

RESEARCH & ANALYSIS

Adam Montgomery | Justin Spencer | Mitch Krueger

CONTENT STRATEGY

Julie Hatfield

MARKETING & DESIGN

LeeAnn Phillips | Candide Mullin | AJ Goodrum | Miguel Castillo | Melissa Key West

Natalee Singleton | Grace Jordan | Lawton Campbell | Emily Underwood | Savannah Wiegand

EXECUTIVE ADVISOR

Karen Moore, CEO & Founder

M.Cast 2027

Taken together, these trends prompt leaders to keep two commitments at once: Move quickly with AI and protect the judgment, relationships, and trust that make your organization worth choosing. Either commitment alone falls short. The leaders who win in 2027 will decide deliberately where machines take the lead and where people stay in charge, then build their teams, measures, and messages around that choice.



MAXIMIZE
WHAT'S NEXT.

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Moore helps organizations make those decisions with foresight and act on them with confidence. As a top 50 U.S. Agency and a Top 200 Global Agency, we bring deep expertise across public relations, public affairs, branding, crisis communications, digital marketing, and data intelligence.

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