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The Cheese Is Moving Faster Than Ever

What a 1998 Parable Teaches Leaders About Disruption in the Age of AI Answers, Robotaxis, and GLP-1s

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On October 29, 2026, investors erased more than $511 billion from Alphabet's market value in a single session. Alphabet's shares fell more than 13%, the largest market-value drop in its history, after search and advertising sales missed forecasts and grew at their slowest pace in five quarters (Los Angeles Times).

The odd part is that Google Search was not shrinking. In the same quarter, Search revenue grew 12% to $63.3 billion (Yahoo Finance), and management said query growth was the highest it had been in five years (Alphabet Investor Relations). The problem was not that people had stopped asking Google questions. It was that they were asking them in a new way. Google's Chief Business Officer, Philipp Schindler, explained that the growing popularity of AI Mode, the AI-generated answer tab inside Search, had weighed on results because AI queries have "lower monetization" (Los Angeles Times).

So the most dominant information company in history now has a painful problem. Customers still come to it, but they want a different product, and that product earns less money. Google is having to move its own cheese and hope the new cheese is as rich as the old.

Nearly three decades ago, Spencer Johnson captured this problem in a short parable that business schools often treat as airport reading: Who Moved My Cheese? This article argues that the book has never been more relevant. The cheese is now moving faster, more often, and in more industries at once than at any time since the book appeared. The leaders who succeed will be the ones who build the habits the parable teaches into strategy, governance, and capital allocation. Skimming the book once is not enough.

IDEA IN BRIEF

The problem: Technology-driven shifts in consumer behavior are now hitting several industries at once and at unusual speed. AI answer engines, autonomous vehicles, low-cost Chinese EVs, AI agents, and GLP-1 drugs are each changing what customers want and how they buy.

Why it happens: Incumbents rarely fail because they cannot see the change. They fail because their profits, metrics, and identity are tied to the old cheese. Like Hem and Haw in the parable, they stay put long after the supply has run out.

The way forward: Leaders must "smell the cheese often" by tracking leading indicators of customer behavior instead of lagging financial results. They must be willing to cut into their own profitable products before rivals do, and they must treat changes in customer expectations as the main strategic signal. Competitors, not the company itself, decide when those expectations reset.

A Parable Built for Our Times

For readers who have not opened it since an orientation week, the story is simple. Four characters live in a maze: two mice, Sniff and Scurry, and two "littlepeople," Hem and Haw. All four find a supply of cheese at Cheese Station C. The mice treat it as temporary. Each day they check its condition and stay ready to move. The littlepeople treat it as a permanent right. They move their homes nearby, build their routines and their sense of identity around it, and stop paying attention to it.

One day the cheese is gone. It had in fact been shrinking for a long time. Sniff and Scurry, who had noticed the decline, quickly head back into the maze and find new cheese. Hem and Haw complain that it is unfair and return to the empty station every day, expecting the old order to come back. In the end Haw overcomes his fear and goes into the maze. As he goes, he writes lessons on the walls: change happens; anticipate change; monitor change; adapt to change quickly; change; enjoy change; be ready to change quickly and enjoy it again. Hem stays behind.

Sophisticated readers often dismiss the book as too simple. That misses what it does well. It does not describe markets. It describes how people and organizations behave when the evidence says the world has changed but their incentives say it has not. Each character matches a type of company in today's economy:

- **Sniff** is the company that spots change early. It watches customer behavior closely and notices when "the cheese is getting old."
- **Scurry** is the company that acts fast. It starts experimenting and redeploying resources before the strategy is perfect.
- **Hem** is the company that refuses to change. It can always explain why the old model will recover: a regulatory fix, a cyclical upturn, a loyal customer base.
- **Haw** is the company that changes late but does change. It can still survive, though usually smaller and with scars.

The maze is the market. The cheese is whatever creates value for customers and profit for the firm. The most important line in the book is a question Haw asks himself: "What would you do if you weren't afraid?" Boards should ask it every quarter.

The Myth of Google's Overnight Death

A popular story has formed around AI search: ChatGPT arrived, and Google became irrelevant overnight. It is an appealing story, and the data do not support it. Students of strategy should be skeptical of it, because the real story teaches more.

Start with usage. As of September 2026, Google still held 89.94% of the worldwide search engine market by StatCounter's page-view measure (Exposure Ninja). Its share has stayed between 89.3% and 91.6% every month since January 2024 (Digital Applied). In 2024, Gartner predicted that traditional search engine volume would drop 25% by 2026 as users moved to AI chatbots and virtual agents (Gartner). Some studies now report declines of that size in specific categories but large differences between them (Fractl). That is evidence of redistribution, not a collapse.

Meanwhile, the challenger has grown at a pace consumer technology has rarely seen. ChatGPT reached 1.2 billion weekly users, a figure announced at OpenAI's DevDay on September 29, 2026, up from 900 million in February (Whizi). That is roughly a sixth of humanity using a product that did not exist four years ago.

How can both things be true? Because Google behaved more like Sniff and Scurry than Hem. It did not defend the ten blue links. It put AI-generated answers on top of them, launched AI Mode, and accepted that this would cut into its own most profitable product. That decision kept customers in Google's maze. It also exposed the real cost of moving your own cheese: when answers replace links, there are fewer places to sell ads. Search ad growth slowed because user queries were migrating to AI Overviews and AI Mode (CNET). One analyst summed up the investor view: "Until Google shows it can charge for AI the way it once charged for search ads," every spending forecast will "read less like ambition and more like a bill" (Los Angeles Times).

Regulation has added more pressure. In 2025, Judge Amit Mehta ruled that Google could keep Chrome, but he barred exclusive distribution contracts for Search, Chrome, Assistant, and the Gemini app, and he required Google to share some search data with rivals (Fortune). Default placement had been one of Google's strongest protections, and it is now weaker.

The lesson for leaders is not "Google is finished." It is more uncomfortable: even a company that moves early and correctly gets punished during the transition, because the new cheese is smaller at first. Moving too early hurts. Moving too late can kill a company. Strategy is mostly about choosing which of those two risks to accept.

The Real Casualties Live Downstream

If Google moved its own cheese, who lost theirs? The companies that built their entire business on the old flow of traffic: users typed a query, Google ranked a link, and someone clicked. Those are the real Hems of the AI-search transition.

Chegg: The Poster Child

Chegg built a business worth billions by selling homework answers to students who found it through Google. Then students began asking ChatGPT directly, and Google began answering their questions on the results page. Chegg's market capitalization peaked at about $14.7 billion and fell to roughly $156 million. In October 2025, the company cut 45% of its workforce, blaming "the new realities of AI and reduced traffic from Google to content publishers" (CNBC). Chegg had already sued Google, arguing that AI summaries were hurting its traffic and sales (same source). A lawsuit is what Hem does: complain about the unfairness of the maze instead of going back into it.

Stack Overflow: When the Community Becomes the Training Data

For fifteen years, Stack Overflow was where software developers went for answers. Its monthly questions peaked at around 200,000 around 2014. They then declined gradually, and the decline sped up sharply after ChatGPT launched in November 2022 (Slashdot). By late 2026, new questions had fallen below 1,000 a month (TokenPost). The irony is hard to miss. The answers that developers had freely contributed helped train the AI tools that replaced the forum. The cheese was not just moved. It was digested.

Publishers: The Click That Never Comes

For the open web, the numbers are stark. In September 2026, the top organic result for commercial Google searches had an average click-through rate of 11.91%. When an AI Overview appeared, that figure fell to 3.51% (eMarketer). One cross-market study found that publishers lost 41.5% of their organic traffic in the United States over two years, compared with a 7.8% decline for non-publishers (Search Engine Land). A European Parliament briefing concluded that the evidence "points in a consistent direction: AI-generated summaries reduce visits to publishers' websites" (European Parliament). The publishers that are holding up are acting like Scurry. People Inc., for example, is moving into social video because Google now accounts for only about 20% of traffic to its portfolio (eMarketer).

Getty Images: Bankrupt in an Image-Rich World

There has never been more demand for images, yet the world's best-known stock photo company filed for Chapter 11 protection in October 2026. Its planned merger with Shutterstock collapsed under heavy debt and growing competition from AI-generated imagery (CNBC). Consumers had not stopped wanting pictures. They had stopped wanting to search a licensed library for a picture that roughly fit, when a model could create exactly the picture they described.

A pattern runs through all four cases. The customer's underlying need stayed the same: an answer, a solution to a coding problem, a news story, an image. What changed was the customer's tolerance for effort. When a competitor delivers the same result with fewer steps, the old route starts to feel like work. This is what I call the expectation reset, and it is the core mechanism of modern disruption.

The Hem Syndrome: Why Smart Organizations Wait at Empty Stations

Business school students tend to assume that the leaders of disrupted companies were foolish. Usually they were not. Clayton Christensen showed in The Innovator's Dilemma that well-run companies often fail precisely because they do what good management recommends: they listen to their best customers, protect margins, and invest where returns are highest. Johnson's parable explains the human side of that dilemma. In practice, four forces keep organizations at Cheese Station C.

1. Profit lock-in. The old cheese is still profitable, often very profitable. Any new cheese starts out smaller, riskier, and less profitable. A CFO who compares the two on next year's numbers will choose the old cheese every time. Google's experience in 2026 shows how high the cost of switching can be even for a company that chooses to switch.

2. Measuring the wrong thing. Most dashboards track revenue, margin, and market share. These are lagging indicators. They report the condition of the cheese after it has gone bad. Leading indicators include share of the customer's first moment of intent, time to answer, and how often customers use competing tools. These are seldom measured and almost never reviewed by the board.

3. Identity. Hem's real problem was not that he lacked information. Cheese Station C had become who he was. Companies can be the same way. "We are a search-advertising company." "We are a photo library." "We build the world's best combustion engines." When the business model becomes the identity, changing the model feels like losing yourself.

4. Waiting for someone to fix it. Lawsuits, lobbying, tariffs, and appeals to regulators can buy time. They rarely bring back the cheese. Chegg sued. Publishers lobbied Brussels. Legacy automakers asked for tariff protection. Each step may be reasonable on its own terms. None of them is a strategy.

Haw's breakthrough came when he realized that his fear was worse than the maze. Most organizations reach that point only when the crisis is already visible in their financial results, and by then much of their bargaining power is gone.

Six Mazes Being Rebuilt Right Now

The AI-search story is the most visible example, but it is only one of several changes happening at once. Below are six markets where the cheese is moving right now, each based on events from the past twelve to eighteen months.

Maze One: Enterprise Software and the End of the Seat

For twenty years, software-as-a-service (SaaS) companies charged per user, per month, for access to an interface. AI agents threaten that model because agents do the work and do not need seats. In early February 2026, roughly $285 billion was wiped from software stock valuations within 48 hours after Anthropic's Claude Cowork raised fears that agents could make per-seat licensing obsolete, a moment the market called the "SaaSpocalypse" (The Globe and Mail). In late October, ServiceNow fell 19% on slowing contract growth even after it beat revenue estimates and raised its AI target. Salesforce, Workday, and Adobe fell along with it (24/7 Wall St.). Gartner estimates that up to $234 billion of enterprise application spending could be at risk from agentic AI through 2030, roughly 20% of SaaS application spending (TradingView/Zacks).

Software is not going away. What is changing is what customers pay for. They are moving from paying for access to paying for outcomes. Pricing models built on access are the old cheese.

Maze Two: Human-Powered Services

The global outsourcing industry was built on a simple advantage: skilled people in lower-cost locations. AI now competes on cost per task, not cost per hour. Concentrix cut the midpoint of its 2026 revenue outlook by about $130 million and warned that some clients had "simply withdrawn customer support altogether in some areas." Shares of its peer TP (formerly Teleperformance) have fallen more than 75% from their December 2021 peak (Outsource Accelerator). Bloomberg reported that investors increasingly view call-center stocks as "uninvestible" (Bloomberg).

India's IT services sector shows the pressure clearly. Combined headcount at TCS, Infosys, HCLTech, Wipro, Tech Mahindra, and LTIMindtree fell nearly 3% to 797,722 over the year to October 2026, even as demand for AI, cloud, and cybersecurity skills kept growing (LatestLY). The traditional staffing pyramid, with many junior engineers at the base billed by the hour, is the cheese at risk.

Maze Three: The Automobile, Rebuilt in China

In 2011, Elon Musk dismissed BYD on Bloomberg TV, saying, "I don't think they have a great product" (USA Today). In 2025, BYD sold more than 2.25 million battery-electric cars, up almost 28%, while Tesla's deliveries fell nearly 9% to 1.64 million. That made BYD the world's largest EV seller (BBC).

For Japanese readers in particular, the more important story is what happened to Japan's automakers in China. Japanese brands held 24.1% of the Chinese market at their 2020 peak. By May 2026, their share had fallen to 10.5% (Business Insider Japan). In September 2026, Honda's sales in China fell about 50% year on year and Nissan's about 60% (Toyo Keizai). These companies were famous for reliability and fuel efficiency. Those strengths did not disappear. Chinese consumers changed what they were measuring. Software, connectivity, and in-car digital experiences replaced the engine as the deciding factors. Engineering excellence that was never in doubt became much less important in the purchase decision.

This is the expectation reset in its purest form. Buyers did not reject Japanese quality. Competitors taught them to value something else.

Maze Four: Mobility Without Drivers

Robotaxis spent a decade as a demo technology. Now they are measured in paid rides per week. Waymo provides more than 500,000 paid rides per week across 15 U.S. metropolitan areas and aims to reach one million by the end of 2026 (AFP). It plans to launch in London this year, in Madrid next year, and in Tokyo in 2027 with Nihon Kotsu and GO, pending regulatory approval (U.S. News). Tesla says more than 300 of its purpose-built Cybercabs are now serving Austin, an eightfold increase in a month (Teslarati).

Every business built around a human driver should pay attention: taxi medallions, driving schools, parking operators, auto insurers that price human error, and car dealerships that depend on individual ownership. The cheese is the assumption that a person owns the car and drives it. That assumption is starting to weaken one city at a time.

Maze Five: The Human Body as a Market

The most surprising disruptor of the decade came from a pharmaceutical lab, not Silicon Valley. GLP-1 drugs such as Ozempic, Wegovy, and Zepbound suppress appetite, and in doing so they change demand across the food economy. A study in the Journal of Marketing Research found that within six months of a household member starting a GLP-1 medication, household grocery spending fell by an average of 5.3%. Spending on savory snacks fell by about 10%, and spending at fast-food and coffee chains fell by about 8%. The share of U.S. households with at least one GLP-1 user rose from about 11% in late 2023 to more than 16% by mid-2024 (Cornell Chronicle).

The first major casualty was WeightWatchers. The 62-year-old program filed for Chapter 11 in May 2025 with roughly $1.6 billion in debt, after the rise of GLP-1 drugs and TikTok fitness influencers (The Columbian/Bloomberg). Big Food is now responding with smaller packs and shorter ingredient lists. PepsiCo and Coca-Cola are among the companies reformulating for GLP-1 users (Reuters). The next stage is generics. Canada became the first G7 country to approve a generic semaglutide injection, priced at less than a third of the original's cost (BBC). Lower prices will broaden adoption, and broader adoption will move more cheese.

Maze Six: Connectivity From the Sky

Rural telecom used to be protected by geography. Laying fiber to remote villages, ships, and aircraft was expensive enough to keep most rivals out. Starlink ended that protection. It reached 13.6 million subscribers in the third quarter of 2026, adding 1.6 million in a single quarter (Satnews), up from 12 million at the end of June (CNBC). For operators whose business depended on being the only provider in a hard-to-reach area, that cheese is gone.

Sniffs, Scurries, and Late-Moving Haws

Not every incumbent is a Hem. Several companies show that a well-established business can still move into the maze in time.

Google is the clearest example of a Sniff. It cut into its own most profitable product before an outsider could do it, and it is paying the price in its share price. The bet is that keeping customers inside its maze is worth more than protecting the old margin. Whether that bet pays off depends on whether Google can make AI answers as profitable as search ads.

Duolingo was labeled an AI casualty because investors assumed chatbots would replace language apps. Instead, the company adopted AI across its product. In February 2026, it gave up more than $50 million of 2026 bookings to focus on user growth, and daily active user growth reaccelerated to 23% in the first half of 2026 (Simply Wall St). Giving up short-term revenue to protect the customer relationship is what Scurry would do.

Expedia is acting like Scurry. Facing fears that AI agents will book travel without visiting travel sites, it released more than 30 AI-driven features across Expedia, Hotels.com, and Vrbo, including natural-language search and an AI voice agent (Perplexity Finance).

WeightWatchers is the clearest Haw: it moved late, but it moved. After emerging from bankruptcy, it partnered with Novo Nordisk to sell Wegovy directly to members at $299 a month and appointed a former Eli Lilly president to its board (The Daily Upside). The company stopped fighting the drug and started distributing it.

Toyota may be the most instructive automotive Haw. In 2025, its sales in China rose for the first time in four years, helped by EVs developed specifically for Chinese buyers (Business Insider Japan). The recovery is fragile, but it shows the principle: build for the customer's new definition of value, not the one your engineering culture prefers.

The difference between these companies and the Hems is not intelligence or resources. It is how quickly they acted after the signal appeared. In Johnson's terms, they shortened the time between noticing that the cheese was going bad and putting on their running shoes.

Where the Cheese Will Disappear Next: A Ten-Year Outlook

Forecasting is risky. The Gartner prediction about search shows that the direction of a change can be right while its timing and scale are wrong. Leaders still have to make bets. The following projections come from the trends described above. Each identifies a business that is likely to become redundant or much smaller, and the force driving that change.

At-risk business	Force moving the cheese	Early warning signal to watch	Likely horizon
Per-seat SaaS and dashboard-based software	AI agents that complete tasks across systems, priced per outcome	Customers renegotiating seat counts; agent-based pricing in RFPs	2026 to 2030
Contact centers, basic BPO, and junior offshore IT work	Conversational and agentic AI replacing work billed by the hour	Clients withdrawing support channels altogether; flat or shrinking headcount	Under way now; largely restructured by 2030
Comparison sites, affiliate marketing, SEO agencies, and some online travel agencies	Agentic commerce: AI assistants that search, compare, and buy	Rising share of transactions starting inside AI assistants; retailers opening product catalogs to agents	2027 to 2032
Ad-funded "how-to" content and homework-help sites	Answer engines that answer directly, so users never click	Click-through rates collapsing when AI answers appear	Largely complete by 2028
Stock imagery, routine translation, voice-over, and basic design	Generative image, video, and voice models	Customers asking for custom output instead of licensed assets	Under way now
Taxi licenses, driving schools, parking, and dealer-centric car retail	Robotaxis and mobility-as-a-service	Weekly paid robotaxi rides per city; falling licence values	2028 to 2035 in leading cities
Auto insurance priced on human error	Autonomous driving moving liability to manufacturers and fleets	Fleet-level insurance contracts; regulators assigning liability to software	2030 to 2035
Combustion-engine supply chains, including exhaust, transmission, and some lubricant chemistry	Low-cost Chinese EVs and the economics of battery platforms	Market-share losses in China spreading to Southeast Asia, the Middle East, and Latin America	2027 to 2035
Diet programs, indulgent snacks, and some quick-service restaurant formats	Cheaper generic GLP-1 drugs and oral formulations	Generic launches in new countries; grocery volume declines in snack categories	2026 to 2032
Rural fixed-line telecom and maritime and in-flight connectivity incumbents	Low-earth-orbit satellite broadband	Starlink net subscriber additions in a region; regulators granting licences	Under way now
Websites as destinations, and the traditional browser	AI assistants and agentic browsers that act for users	Share of tasks completed without visiting a website	2028 to 2035

Three of these projections deserve more explanation.

First, the website as a destination. For thirty years, digital strategy assumed that customers would come to you: to your homepage, your app, or your shopping cart. Agentic commerce reverses that. BCG reports that 68% of retailers expect agentic commerce to have a significant or transformational effect within two years (BCG). Google has launched the Universal Commerce Protocol, an open standard for AI agents to transact with retailers (Google). If an agent does the browsing, the brand's real customer becomes the algorithm, and businesses built on persuading human visitors will lose much of their value.

Second, the entry-level professional. Every professional services firm, including law, accounting, consulting, and IT, runs on a pyramid. Junior staff do routine work that is billed at a profit and that trains them to become partners. AI threatens the bottom layer of that pyramid first. That creates both an economic problem and a talent problem: if firms no longer hire juniors, where will future partners come from? The firms that redesign apprenticeship around AI will move to the new cheese. The firms that simply cut junior hiring may be eroding their own future.

Third, the industrial supply chain. Disruption in end markets travels upstream. When consumers stop buying combustion cars, demand falls for engine parts, exhaust catalysts, transmission fluids, and the specialty chemicals used to make them. At the same time, demand rises for battery materials, including fluorinated electrolyte salts and binders, separators, thermal-management fluids, and semiconductor-grade chemicals. Suppliers far from the consumer often notice last because their customers' orders are a lagging indicator of a lagging indicator. For an industrial company, "smelling the cheese" means watching the end consumer, not just the next customer in the chain.

The Cheese Audit: A Practitioner's Toolkit

How do leaders turn a parable into practice? I propose a discipline I call the Cheese Audit. It has six parts, each based on a lesson Haw wrote on the wall of the maze.

1. "Smell the cheese often so you know when it is getting old." Build a dashboard of leading indicators that customers create before the financial results show anything. Examples include the share of customer journeys that begin on a platform you do not control, the time customers take to complete the main task you help with, and how often customers use competing tools for that same task. Review these indicators at board level every quarter, alongside revenue.

2. "Notice the small changes early." Assign a team to study non-customers and early adopters at the edge of the market. The expectation reset always shows up there first: students using ChatGPT for homework, developers using coding agents, Chinese buyers choosing software-defined cars, households filling GLP-1 prescriptions. Founders of disruptive companies spend their time with these groups. Incumbent executives spend theirs with their largest existing accounts.

3. "The quicker you let go of old cheese, the sooner you find new cheese." Fund a unit whose job is to compete with your own core product, and give it permission to do so. Google's AI Mode is that kind of unit at enormous scale. Most firms need something smaller. What matters is that the unit is judged on customer adoption, not on whether it protects existing profit.

4. "Movement in a new direction helps you find new cheese." Shorten the time between noticing a change and acting on it. Set an explicit decision rule. For example: if a leading indicator moves by a set amount for two consecutive quarters, a preapproved reallocation of capital happens automatically. Making the response automatic removes the endless debate that keeps Hem at the empty station.

5. "Old beliefs do not lead you to new cheese." Separate the company's identity from its business model. Write down your purpose in terms of the customer's need, such as "helping people find answers," "getting people from A to B safely," or "helping people be healthier," rather than your current product. Companies that define themselves by the need can adapt. Companies that define themselves by the product tend to resist change.

6. "What would you do if you weren't afraid?" Hold a yearly "empty station" exercise. The executive team assumes the core profit pool has disappeared and designs the company that would replace it. Then compare that imagined company with the real one. The gap between them is your strategic risk.

Conclusion: Customers Do Not Wait

The most important lesson of the past two years is not about technology. It is about customers. AI answer engines, Chinese EVs, robotaxis, and GLP-1 drugs did not create new human needs. People have always wanted answers, transportation, affordable cars, and good health. What these technologies changed was customers' expectations of how those needs should be met: faster, with less effort, more personally, and at lower cost.

Once a competitor resets those expectations, the change rarely reverses. A student who has received a step-by-step explanation in seconds will not go back to waiting for a forum reply. A developer who has worked with a coding agent will not go back to searching through old threads. A Chinese family that has driven a software-defined car will not go back to a dashboard designed in 2015. Expectations formed in one market also spread to others. Once customers get instant, conversational, personalized service in one part of their lives, they expect it everywhere. An insurer, a bank, or a chemical distributor is now judged against the best experience customers have had anywhere, not just against its direct rivals.

That is why monitoring competitors in the traditional sense is no longer enough. Leaders must watch how competitors, including those from other industries, other countries, and outside the corporate world entirely, are changing what customers consider normal. The threat to Chegg came from a research lab, not another tutoring company. The threat to

Honda came from Chinese companies that think about cars as software products, not from Toyota. The threat to snack makers came from a pharmaceutical company, not a rival brand.

Spencer Johnson ended his parable with Haw finding New Cheese Station N and choosing, this time, to stay alert. He keeps exploring the maze even while the cheese is plentiful. That is the mindset every future leader needs: success is temporary, and the best time to look for new cheese is while you still have plenty of the old.

The cheese has always moved. What has changed is the speed. Sniff and Scurry did not win because they were smarter than Hem and Haw. They won because they never forgot that the cheese could disappear. For the generation of leaders now studying at the world's business schools, that may be the most important lesson they learn.

Questions for Discussion

1. Google chose to cut into its own most profitable product and its share price suffered for it. Was that the right decision? What would have happened if it had protected the ten blue links?
2. Which character, Sniff, Scurry, Hem, or Haw, best describes your current or most recent employer? What evidence supports your answer?
3. Choose one industry from the ten-year outlook table. What single leading indicator would tell you first that the cheese is moving, and who in the organization should be responsible for tracking it?
4. Japanese automakers did not lose their engineering advantage in China. Customers changed what they valued. How can a company detect a change in the basis of competition before it shows up in market share?
5. If AI agents become the main "customers" for many products, what does brand loyalty mean? How should marketing education change?
6. The entry-level layer of professional pyramids is the most exposed to AI. As a future leader, how would you redesign apprenticeship in your industry?

Note on sources: All data in this article come from public reporting and company disclosures available as of October 30, 2026, cited inline. The ten-year outlook represents the author's projections, not reported facts.

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