

2026 TrendKey®

Global Edition

September 2026

NIQ Consumer Life Roper Reports® Global

NielsenIQ

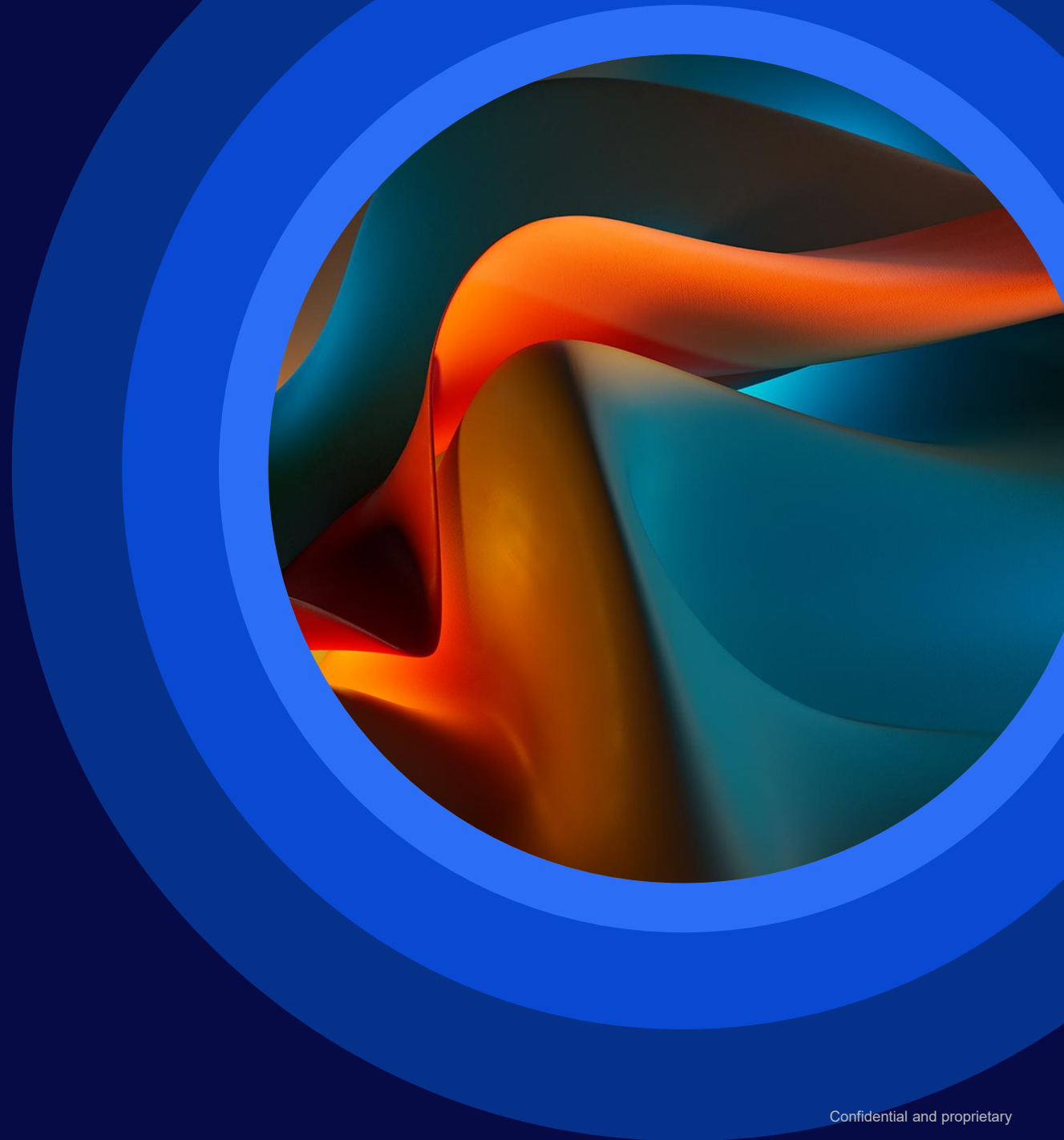


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Introduction



Why TrendKey®

Because the world is always changing, and so are consumers

TrendKey is a launch pad to develop next-stage thinking, helping you plan for the future through a structured and data-rich platform. It is an excellent tool for workshopping strategic business issues based on robust consumer understanding, combining external forces impacting consumers with trends and market manifestations.

Each of the nine macro trends in TrendKey has been identified through analysis of NIQ Consumer Life Global data, as well as observations of the global marketplace.

Recognizing the existence of certain trends is just the beginning. TrendKey provides a toolkit of trend narratives, data-driven insights, and market manifestations to fuel strategic thinking for future market planning.

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The power of trends

Trends are valuable in several business contexts

- **“White space” or innovation exercises:** Input for ideation around new products or services, and insights to help frame each step of the development process.
- **Corporate strategy:** Long-term business planning, getting up to speed on a new target customer, and informing rebranding initiatives.
- **Primary research projects:** Informing expert interviews, developing screening criteria, and supporting effective questionnaire or discussion guide development.
- **Marketing and communications:** Developing culturally relevant messaging and crafting marketing campaigns or brand activations that are “on trend.”
- **Customer and partner collaboration:** Providing a framework for stakeholders that helps align all parties on consumer needs.
- **Internal alignment:** Input for new employee onboarding, professional development, cross-functional collaboration, and broader organizational change initiatives.

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External forces provide the context in which people live their lives. We have identified nine macro trends that describe how people react to those forces, as well as sub-trends that relate to each major trend. This report covers all three areas.

EXTERNAL FORCES (STEEP)

These are social, technological, economic, ecological, and political shifts that are beyond the control of individuals, but are the root causes of consumer change, driving macro trends and sub-trends.

MACRO TRENDS

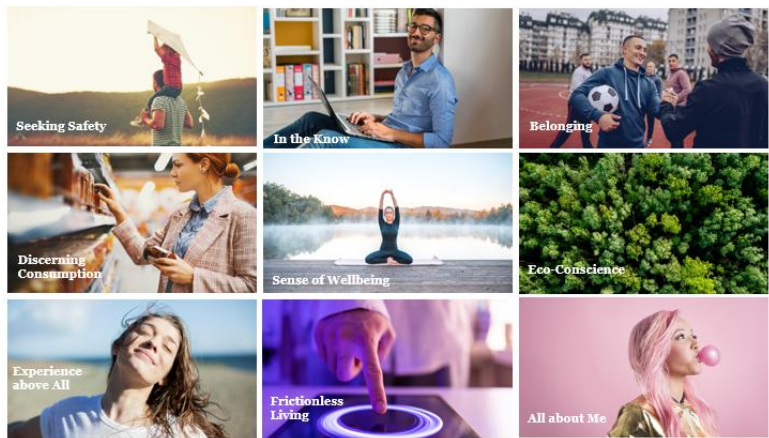
Consumer attitudes and behaviors shaped by external forces, representing genuine, long-term shifts in consumer wants and needs. Macro trends may be shaped by multiple external forces.

SUB-TRENDS

These are specific aspects of macro trends that may be shorter-term and more focused in nature. Note that the sub-trends in this report are not comprehensive, merely illustrative.

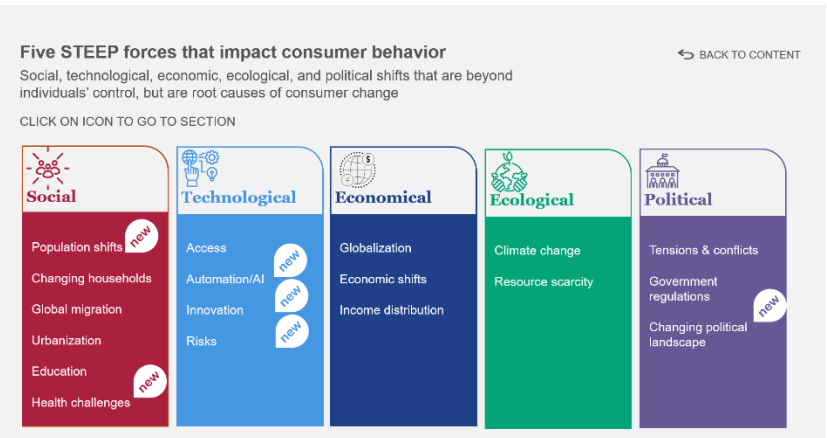
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Nine Macro Trends

A look at the nine macro trends and 27 sub-trends, including a description of what each trend signifies, data highlights primarily from the 2026 Consumer Life US and Global studies, and manifestations of the trend in the marketplace.



External Forces (STEER)

An in-depth look at the global forces that impact consumer behavior, structured around the commonly used STEEP framework: Social, Technological, Economic, Ecological, and Political.



Appendix

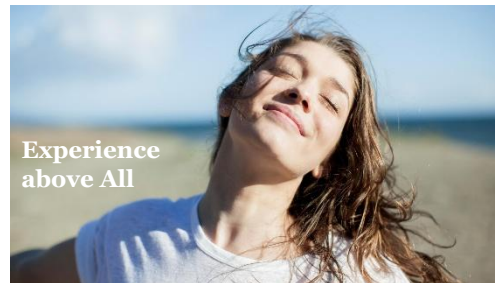
2026 Consumer Life Global study coverage and methodology.

Nine Macro Trends



Lean into the future with nine macro trends

Click on tile to navigate to trend



Seeking Safety

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”

I want to be kept safe and secure in a world of increasing uncertainty, threats, and danger (both real and perceived). I appreciate products and services that help me conquer the fear so I can pursue the life I want and gravitate toward the companies and brands that I can trust for quality, safe products.

The world is a scary place, and I need reassurance.

Seeking Safety

Trend indicators:

“I am always concerned about my safety and security”

“Where and how a product is made is very important to me”

“I worry about getting sick from contaminated food or drink products”

External forces behind this trend:



Social

Health challenges



Technological

Access | Automation/AI | Risks



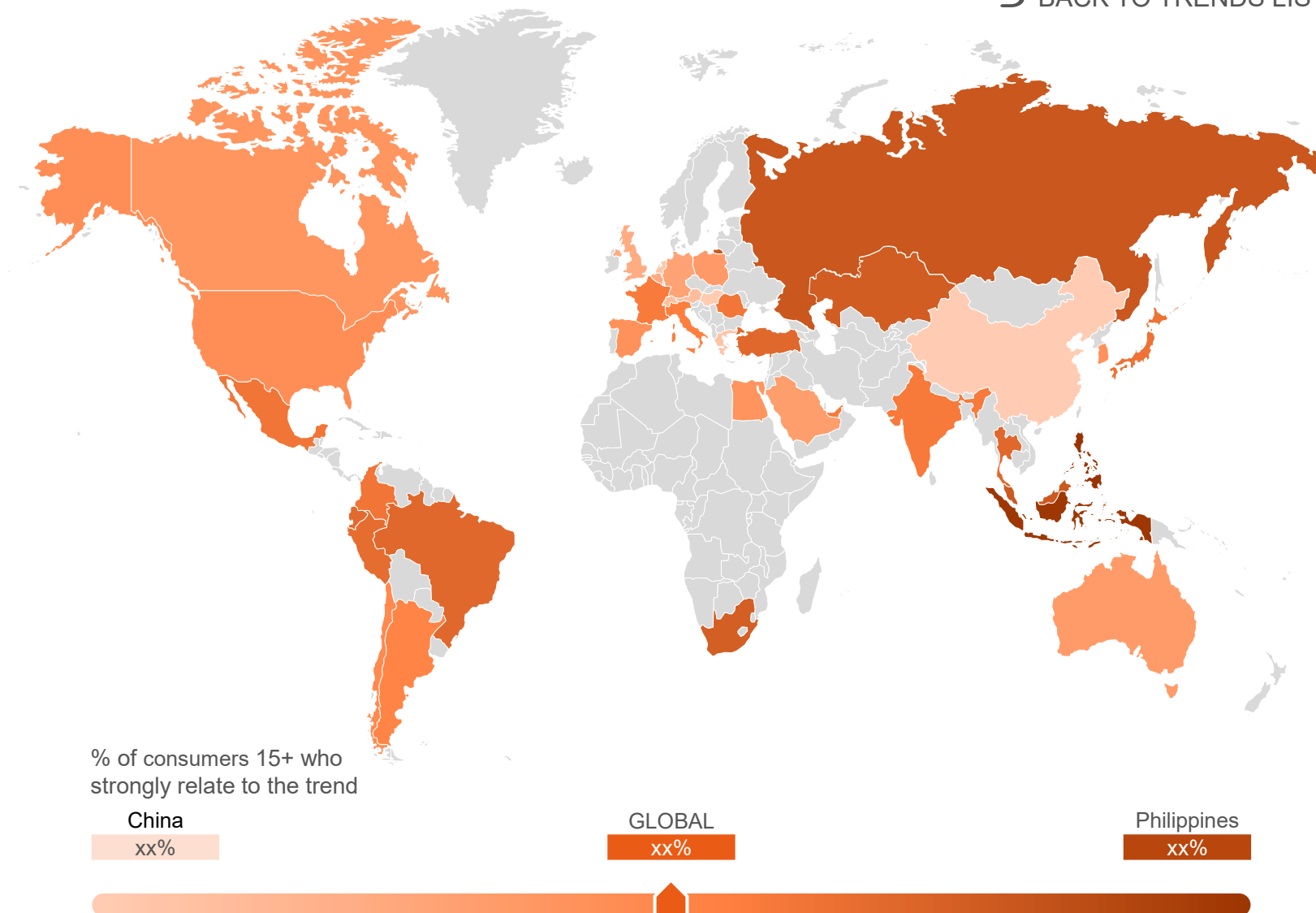
Ecological

Climate change | Resource scarcity



Political

Tension & conflict | Government regulations |
Changing political landscape



NIQ Consumer Life 2026, EJM1 (Global = 39 countries)



I. Protect me

Consumers seek physical safety in a world of old and new threats.



II. Defend me

Consumers expect companies to guard sensitive information.



III. Comfort me

Brands have an opportunity to offer comfort, care, and emotional uplift as consumers navigate a stressful world.

Seeking Safety

I. Protect me

Physical security has always been a fundamental consumer need, but the ways that people protect themselves and their loved ones continue to evolve as the world faces new and emerging threats.

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NIQ Consumer Life Global 2026 C1, EJM (Global = 39 countries),
EJM1 (global = 39 countries),
Google is adding safety features to kids' phones,
*Android safety feature that lets users schedule a check-in when they're in a situation where they may want extra reassurance, such as walking home alone or traveling.



Protecting the Family

Having safety for loved ones

#x personal value globally on a list of 57 values measured

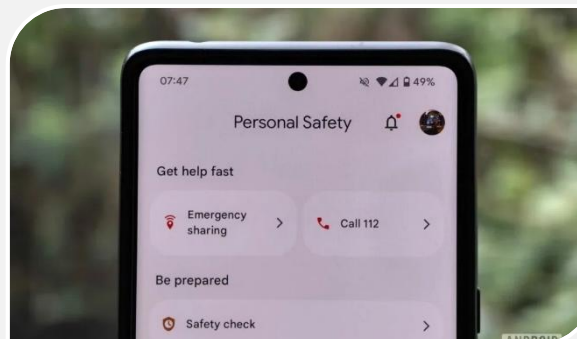
“**xx%** of global consumers agree
I am always concerned about my safety and security,”

making it the #xx life attitude on a list of 44 measured attitudes

#x in Indonesia

#x in Malaysia and Brazil

Trend in the marketplace



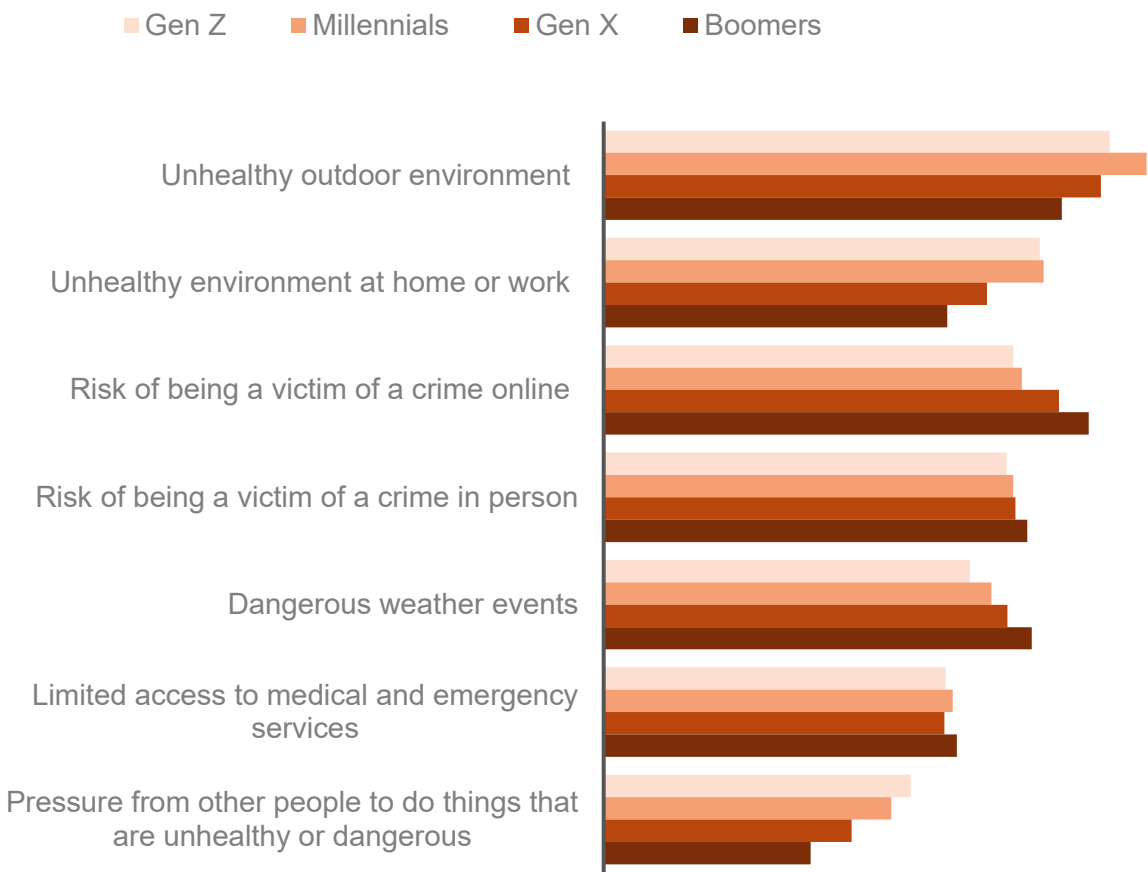
Google turns kids' phones into safety tools

In June 2026, Google expanded several Android safety features to children's and teens' devices globally, reflecting growing consumer demand for tools that help protect loved ones and provide peace of mind. Google embedded safety directly into everyday smartphones by giving younger users access to features such as emergency information on the lock screen, car crash detection, Safety Check*, and real-time location sharing.

Physical threats come in different forms

Unhealthy outdoor environments have emerged as the #1 perceived threat among global consumers

% who consider the following **serious threats** to them or their families



NIQ Consumer Life Global 2025, H48 (global = 40 countries)



Products can protect or harm consumers

Safety can be a fundamental selling point or barrier for adoption



XX% of global consumers

cite **“safety in accident”** as a **VERY important vehicle characteristic**

#x vehicle characteristic globally on a list of 17 measured, following only “reliability”



XX% of global consumers

cite **“safety concerns with the technology”** as a disadvantage of electric vehicles



XX% of global consumers agree

“I worry about getting sick from contaminated food or drink products”

#xx life attitude globally on a list of 44 measured

#x in Indonesia

#x in Malaysia and the Philippines

NIQ Consumer Life Global 2026 D08, SS30 (global = 39 countries), NIQ Consumer Life Global 2026 EJM1 (global = 39 countries), [US diners avoid restaurants as cyclosporiasis fears cut lettuce sales](#), [Restaurant visits fall, grocery store lettuce sales dip. Here's how cyclosporiasis is affecting businesses](#)



In summer 2026, a US cyclosporiasis outbreak linked to contaminated shredded iceberg lettuce from Taylor Farms de Mexico triggered a major food safety scare and sharp drops in fast-food foot traffic.

Seeking Safety II. Defend me

Consumers increasingly recognize the risks of cybersecurity and expect companies to safeguard their sensitive information.

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NIQ Consumer Life Global 2026 A2 (global = 39 countries),
NIQ Consumer Life Global 2025 TDA (global = 40 countries)
[WhatsApp lets users hide their phone numbers](#)

Personal information falling into the wrong hands

#xx personal concern globally on a list of 24 tracked

#xx in Thailand

#xx in Malaysia and Singapore

“ **xx%** of global consumers agree
**Privacy records of brands and technology companies
are very important in my purchase decisions”**

xx% in Indonesia

xx% in Brazil

xx% in India

Trend in the marketplace

Keep your phone
number private with
Usernames



WhatsApp to keep phone numbers private

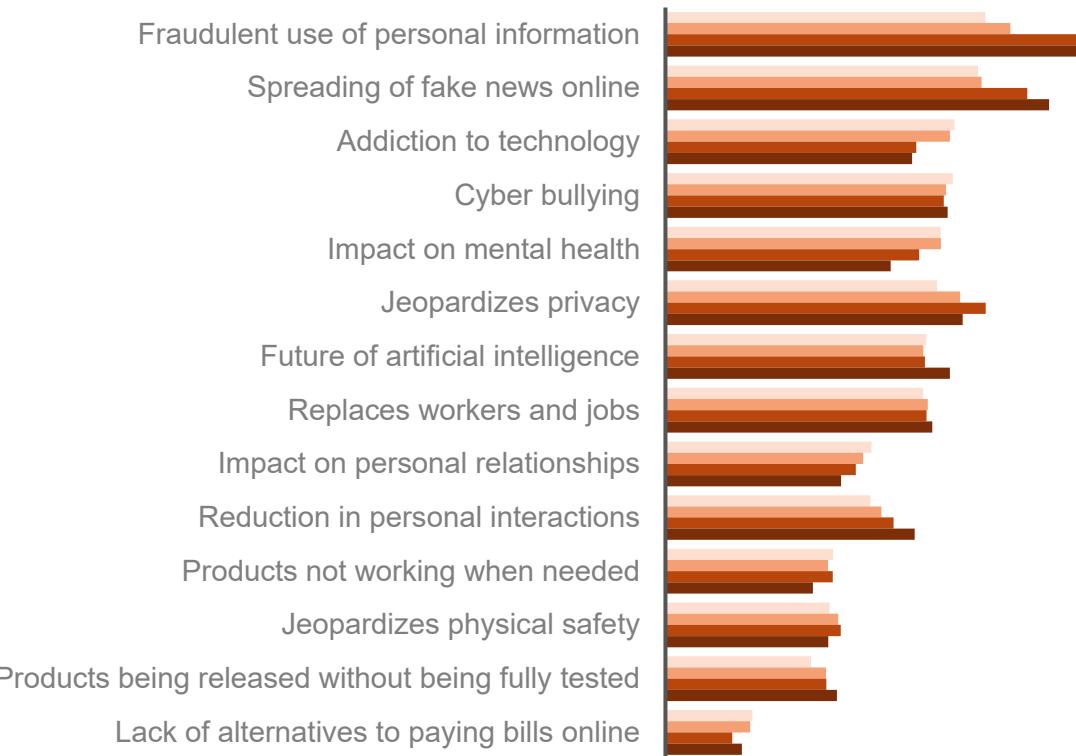
Meta-owned WhatsApp introduced a new username system in June 2026 that will allow people around the world to connect without automatically sharing their phone number, addressing a major privacy concern for users. Instead of exposing personal contact information when joining groups, messaging new people, or interacting with businesses, users will be able to communicate through a username while keeping their phone number private.

Cybersecurity: the #1 tech concern globally

Older generations are the most anxious

% of global consumers most concerned about the following when it comes to technology

Gen Z Millennials Gen X Boomers



NIQ Consumer Life Global 2025 TD_4 (global = 40 countries)



Seeking Safety

III. Comfort me

People seek solace in a stressful world. Companies can provide comfort and peace of mind through trusted brands with transparent provenance.

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“ **xx%** of global consumers agree
I ONLY buy products or services from a trusted brand,”
making it the #xx life attitude globally on a list of 44 consistently measured attitudes
#xx in Russia
#xx in Malaysia and the Netherlands

“ **xx%** agree
Where and how a product is made is very important to me,”
making it the #xx life attitude globally
#xx in the Philippines and Kazakhstan
#xx in France and Egypt

Trend in the marketplace



Tesco builds trust through transparency

In late 2025, UK retailer Tesco expanded its Sustainable Farming Program to help farmers capture and measure soil, water, and nature data across its supply chain. By supporting more consistent environmental reporting and establishing clear sustainability baselines, the initiative responds to growing consumer demand for transparency and trust in food production.

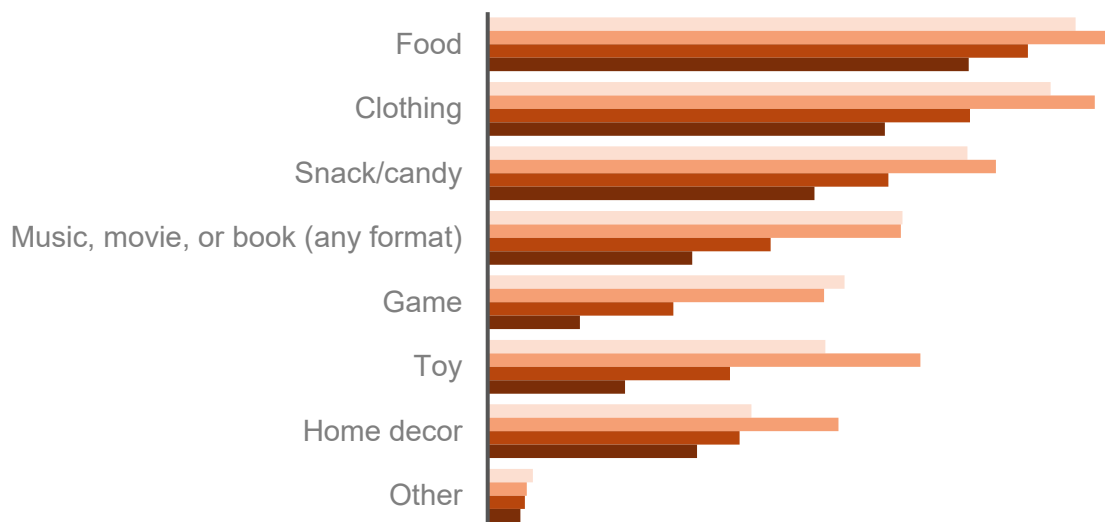
Finding comfort in the good old days

Younger generations drive nostalgic purchases

XX% of global consumers
bought products in the past few years because
of their nostalgic appeal

*% of global consumers who bought any of the following products in the past few years because of their **nostalgic appeal***

■ Gen Z ■ Millennials ■ Gen X ■ Boomers



NIQ Consumer Life Global 2026 R18 (global = 39 countries)





In the Know

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I want to keep up with what's new in the marketplace. **I am willing to put in the time and effort to make solid and informed purchase decisions and am not looking for the easy way out.** My information gathering includes other people's opinions. Increasingly, it also involves separating truth from fiction.

I want to be an informed consumer and make an effort to stay up to date.

In the Know

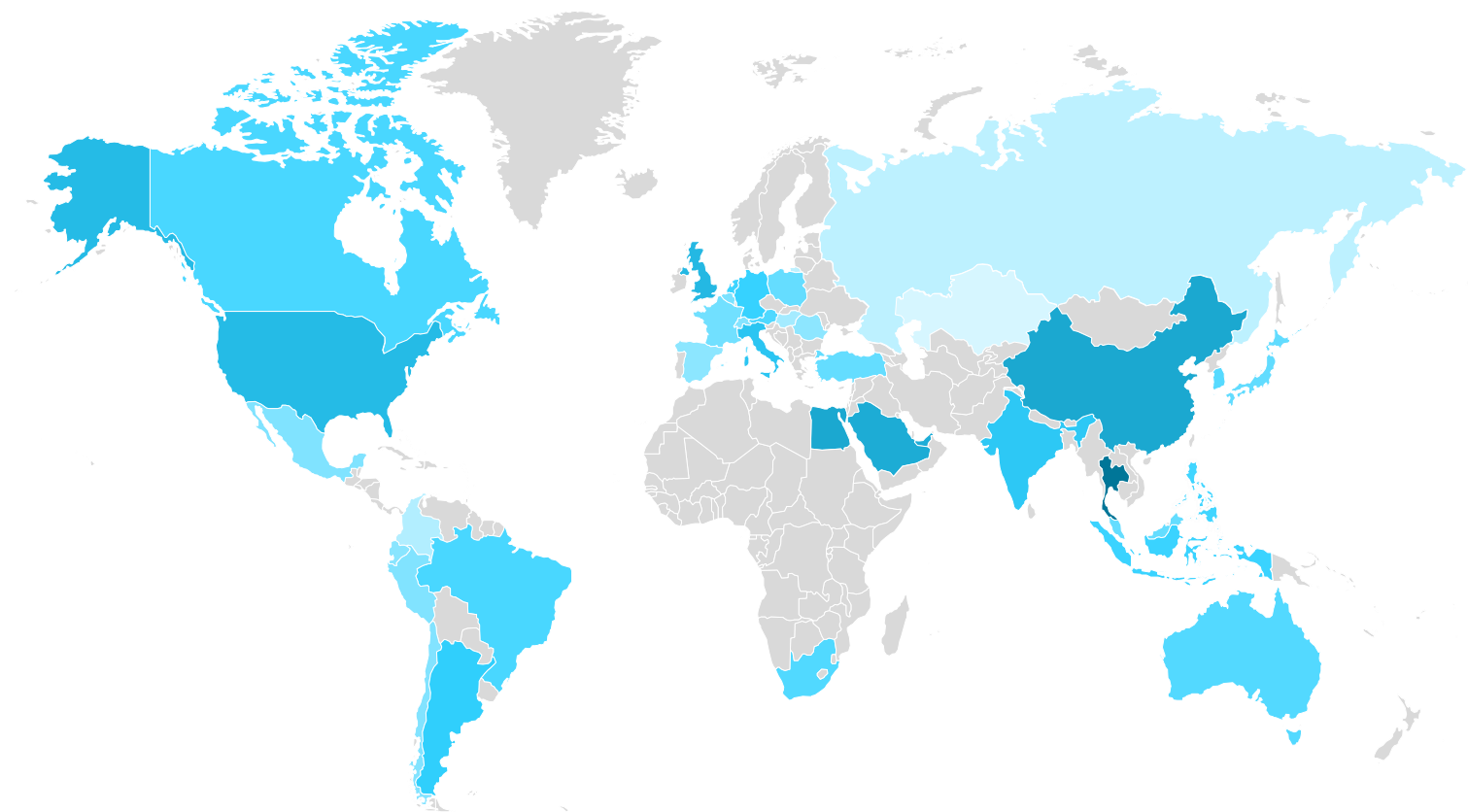
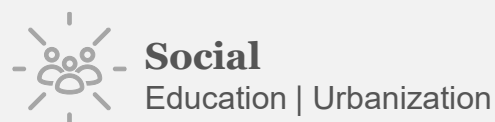
Trend indicators:

“I spend quite a lot of time researching brands before making a major purchase”

“I’m always on the lookout for new products and services”

“I am interested in other people’s opinions about what products and services to buy”

External forces behind this trend:



% of consumers 15+ who strongly relate to the trend

Kazakhstan
x%

GLOBAL
xx%

Thailand
xx%



NIQ Consumer Life 2026, EJM1 (Global = 39 countries)



I. Informed decisions

Consumers have become more determined and equipped to make informed shopping decisions.



II. Influence rewired

The advances and democratization of technology are re-shaping influence and product discovery.



III. Seeking truth & trust

In an age of growing confusion and misinformation, truth and trust are ever more desired.

In the Know

I. Informed decisions

Enabled by technology and trained by inflation and persistent economic uncertainty, consumers are more determined to make informed shopping decisions.

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“ **xx%** of global consumers agree
I spend quite a lot of time researching brands before making a major purchase,”

making it the #xx life attitude globally on a list of 44 measured
#xx in Japan
#xx in Germany
#xx in Argentina

“ **xx%** agree
I am interested in other people's opinions about what products and services to buy,”

making it the #xx life attitude globally
#xx in Thailand
#xx in Spain
#xx in Poland

Trend in the marketplace



AI shopping tools help consumers buy smarter
AI-powered shopping assistants are gaining traction around the world as consumers look for help researching products, comparing options, and evaluating reviews before making purchases. Tools from companies such as Perplexity, Google Gemini, and Amazon enable shoppers to compare products, aggregate reviews, assess trade-offs, and find the best option through conversational search.

Peer reviews are among the most powerful source of influence today

Advertising falls to the bottom of the list

% of global consumers citing the following as **VERY important** to them when shopping

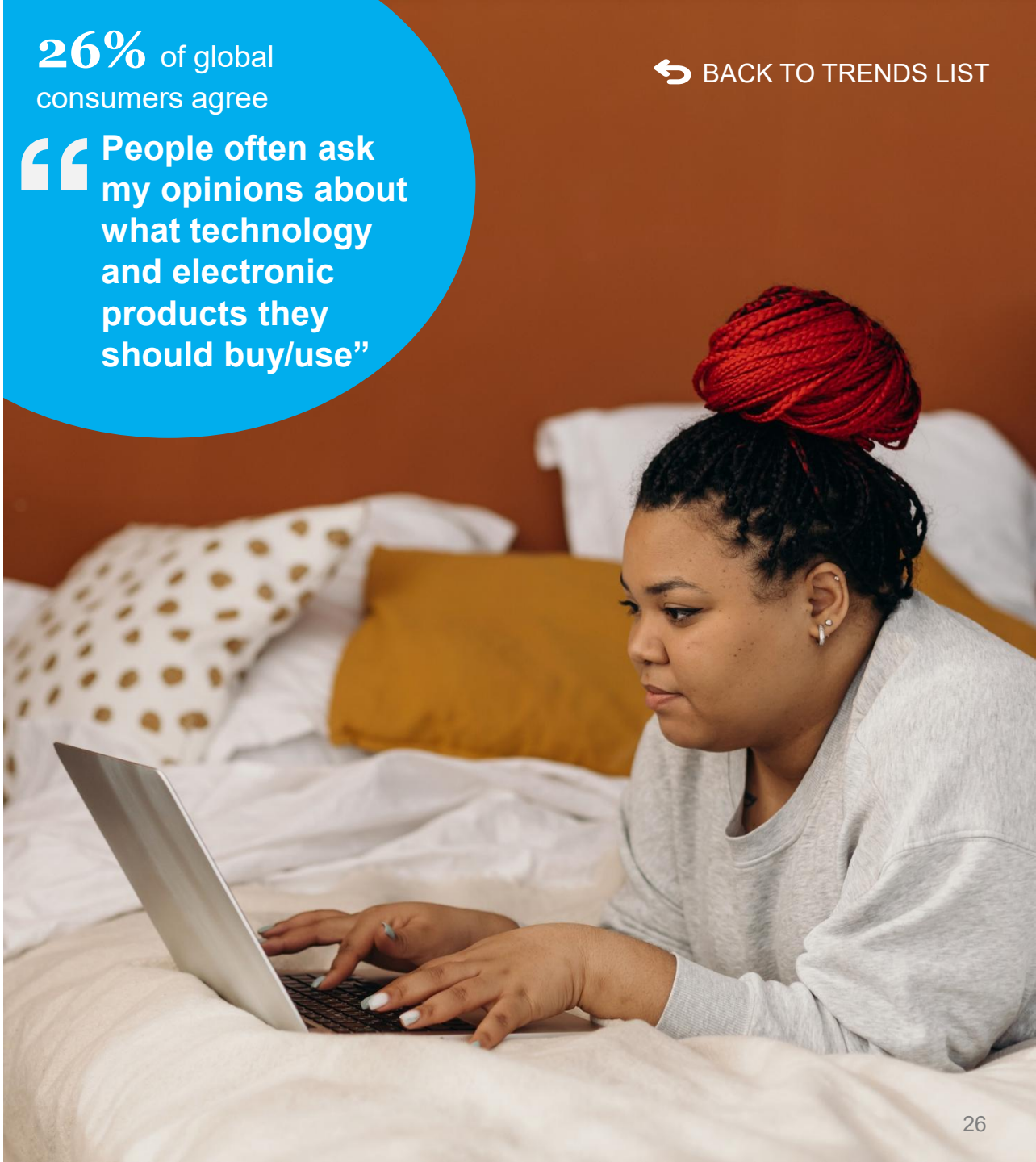


NIQ Consumer Life 2026 Global FB_15N, 06 (global = 39 countries)

26% of global consumers agree

“People often ask my opinions about what technology and electronic products they should buy/use”

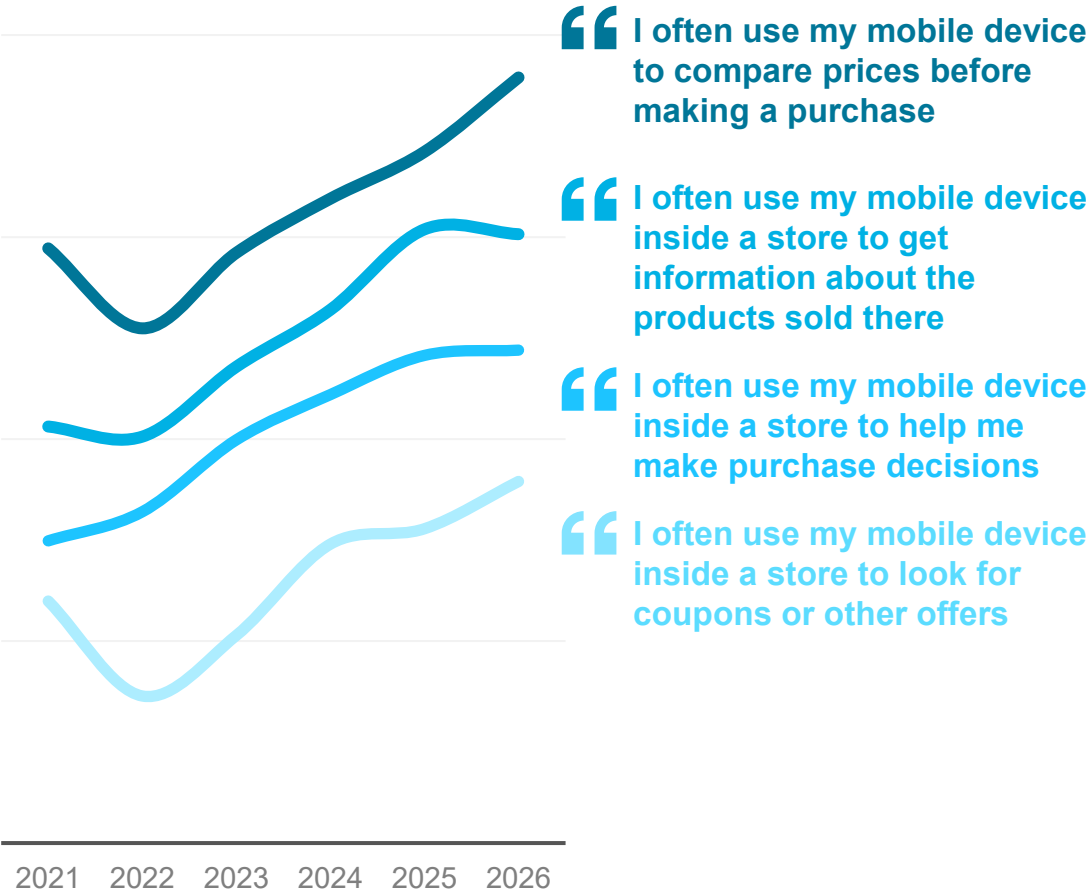
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Smartphones enable in-the-moment information

US as an example

% of American consumers who agree



“ I often use my mobile device to compare prices before making a purchase

“ I often use my mobile device inside a store to get information about the products sold there

“ I often use my mobile device inside a store to help me make purchase decisions

“ I often use my mobile device inside a store to look for coupons or other offers

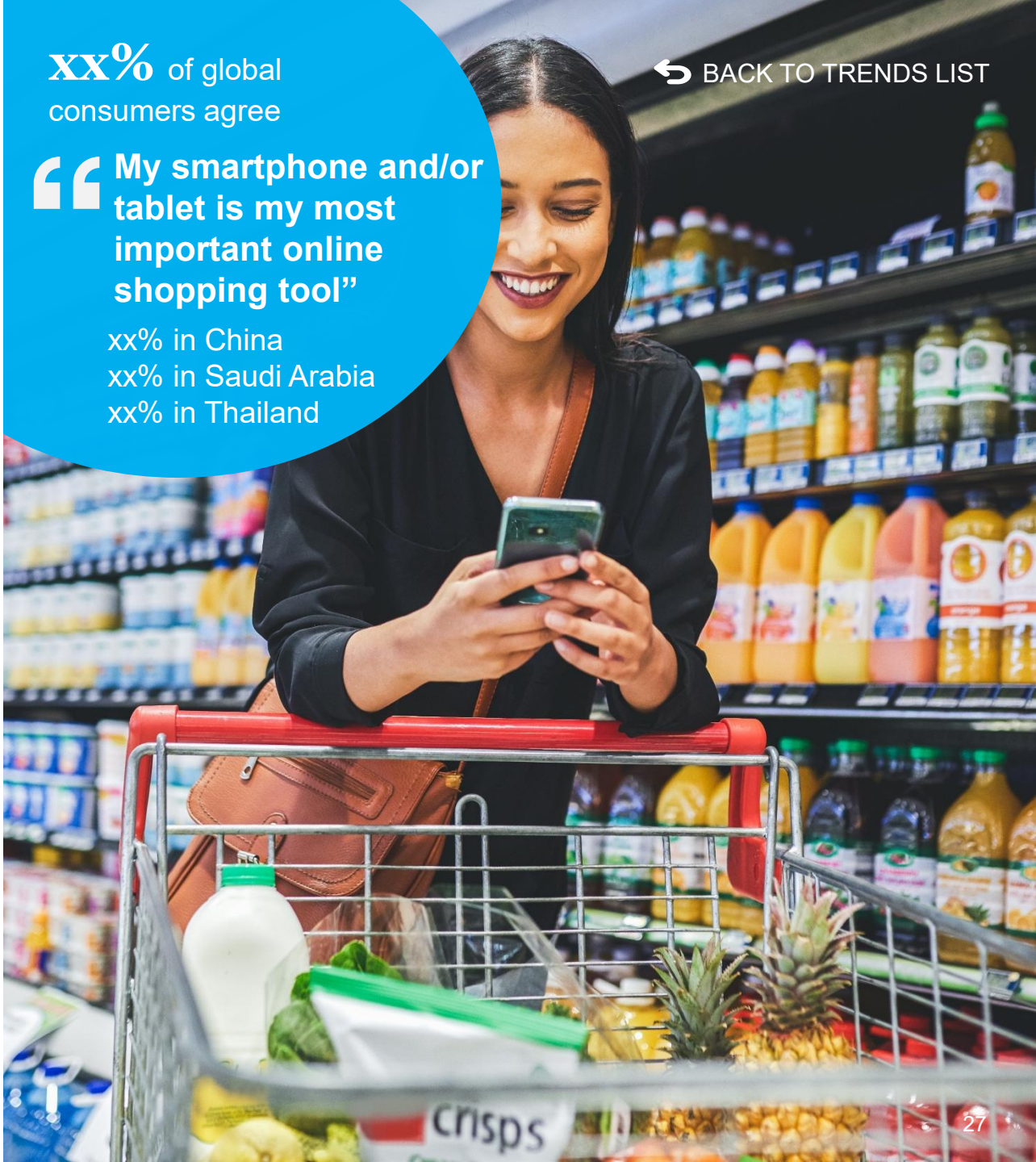
MRI-Simmons 2021-2026 Spring, Consumer Life Global 2025 FB_11 (global = 40 countries)

xx% of global consumers agree

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“ My smartphone and/or tablet is my most important online shopping tool”

xx% in China
xx% in Saudi Arabia
xx% in Thailand



In the Know

II. Influence rewired

The rise of social media and AI is reshaping influence and product discovery.

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NIQ

NIQ Consumer Life Global 2026 and previous years FBS_1, O4 (global = 39 countries)
TikTok World '26: Turning Discovery Into Business Growth

XX% of global consumers
shop on social media using “buy”
buttons or “shoppable posts”
↑**xx pts** from 2024



XX%
used artificial intelligence (AI) tools
or apps in the past 30 days
↑**xx pts** from 2025, ↑**xx pts** from 2024



Trend in the marketplace

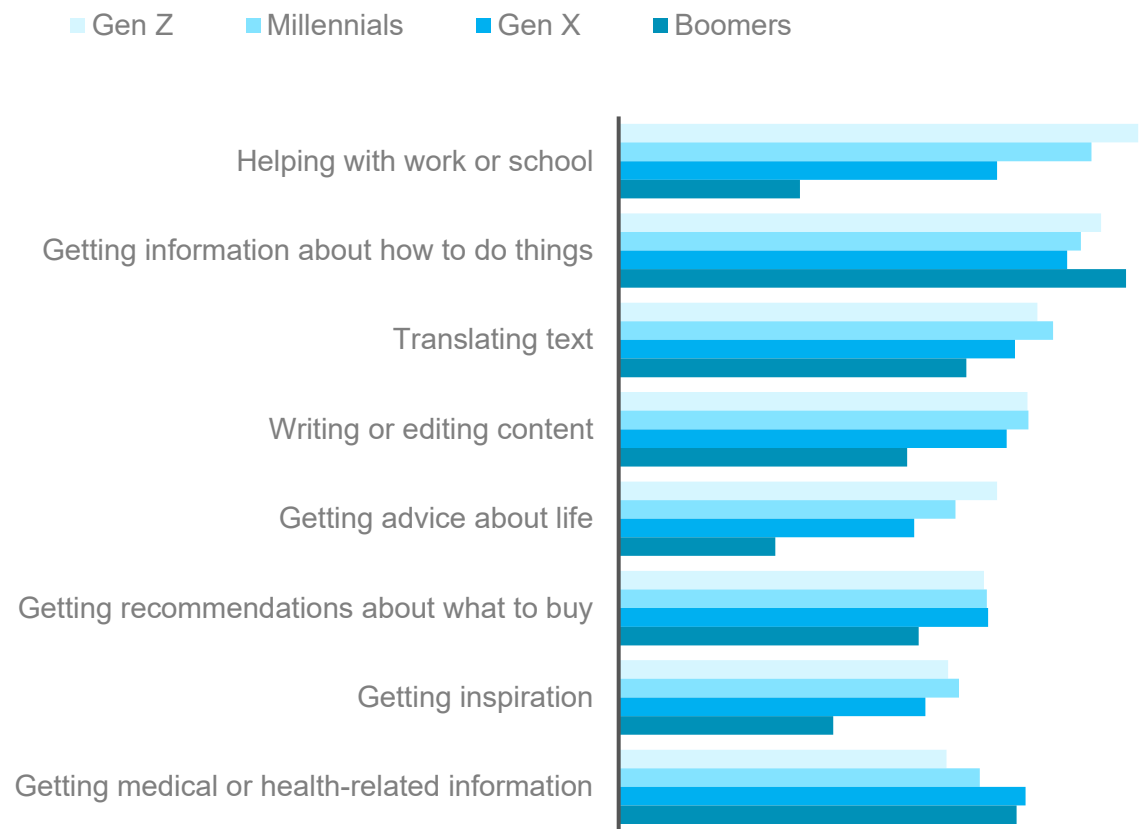


TikTok blends social discovery, AI, and shopping
At TikTok World 2026, TikTok unveiled a series of AI-powered commerce and discovery tools designed to help users find, evaluate, and purchase products without leaving the platform. New features include Creator AI Search to match brands with relevant creators, enhanced product discovery experiences, and expanded TikTok Shop capabilities, further integrating entertainment, influence, and commerce.

AI tools have become a critical part of information gathering

Areas of focus vary by generation (and life stage)

% of global AI users* who personally used AI tools in the past six months for the following



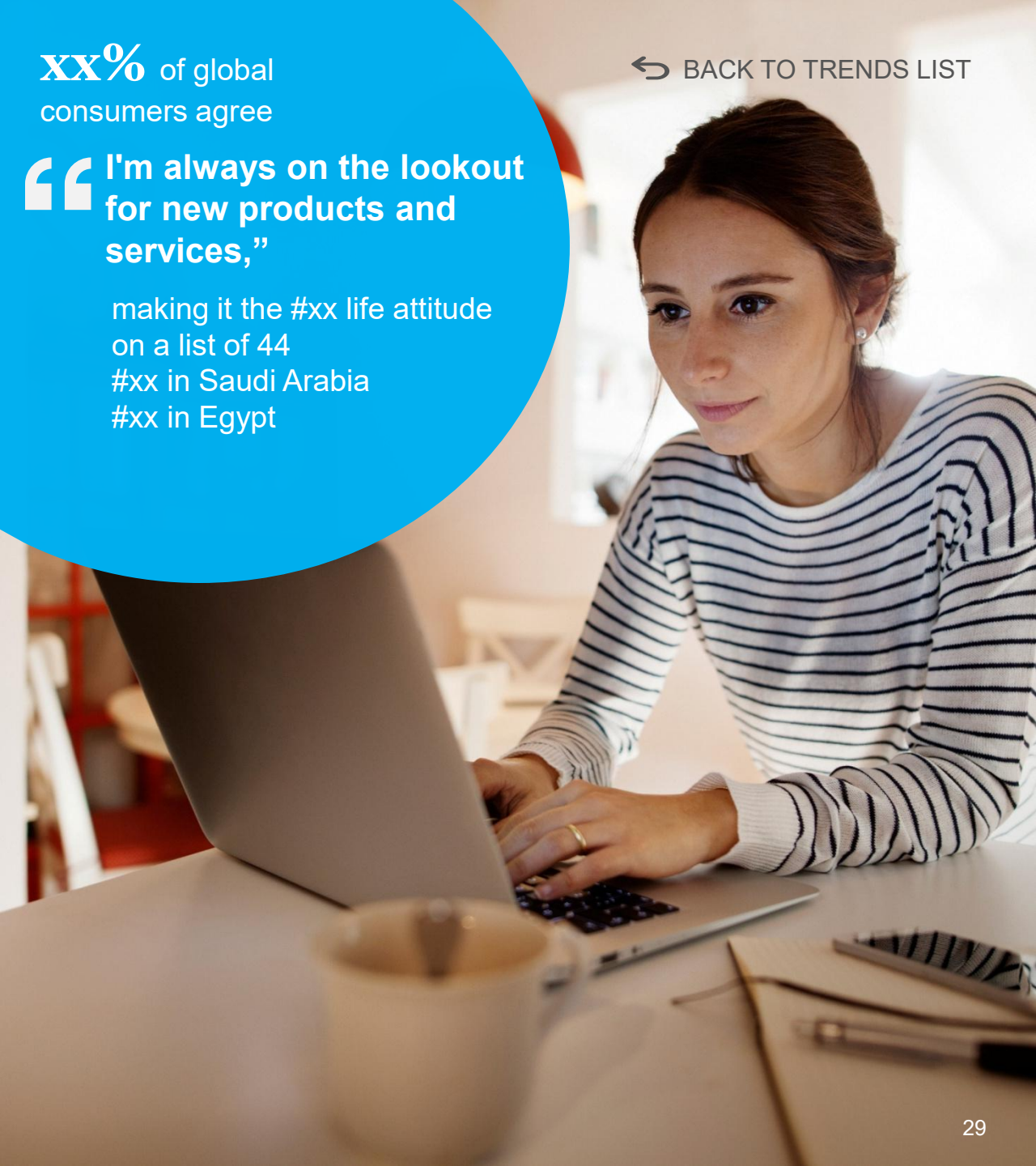
NIQ Consumer Life 2026 Global O44, EJM1 (global = 39 countries),
*defined as those who used AI apps or tools in the past 30 days (45% of global consumers)

xx% of global consumers agree

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“I'm always on the lookout for new products and services,”

making it the #xx life attitude on a list of 44
#xx in Saudi Arabia
#xx in Egypt



In the Know

III. Seeking truth & trust

Trusted voices and credible information are increasingly valued as AI proliferation and growing cultural divides blur the line between fact and fiction.

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“**XX%** of globally consumers worry that **AI will spread misinformation**”
xx% in Japan
xx% in Switzerland and Austria



11% of global consumers fear **Misinformation presented as fact**, making it the #13 personal concern globally on a list of 24 measured
xx% and **#x** in Korea
xx% and **#x** in Poland
xx% and **#x** in Hungary

Trend in the marketplace



Reuters: "Pure News, Straight from the Source"

Global news agency Reuters launched a campaign in late 2025 centered on the importance of credible information and trusted sources. The campaign used the metaphor of clean versus contaminated water to illustrate how information becomes distorted as it moves farther from its original source, and intentionally incorporated AI imagery to demonstrate how easily convincing but false content can be created.

External forces (STEEP)



Five STEEP forces that impact consumer behavior

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Social, technological, economic, ecological, and political shifts that are beyond individuals' control, but are root causes of consumer change

CLICK ON ICON TO GO TO SECTION



Social

Population shifts new

Changing households

Global migration

Urbanization

Education new

Health challenges



Technological

Access new

Automation/AI new

Innovation new

Risks



Economic

Globalization

Economic shifts

Income distribution



Ecological

Climate change

Resource scarcity



Political

Tensions & conflicts

Government regulations new

Changing political landscape

A seismic shift in the age structure

An ongoing decline in fertility and an increase in longevity continues to bring sharp changes in the age structure of economies. Globally, the share of population age 60+ is expected to nearly double between 2010 and 2035, accounting for almost one-fifth of the global population. Meanwhile, the share of the youth population continues to drop. **In more developed economies, people age 60+ already outnumber those under 25** (28% vs. 26% of the population in 2026) and will widen the gap in coming years (31% vs. 25% by 2035).

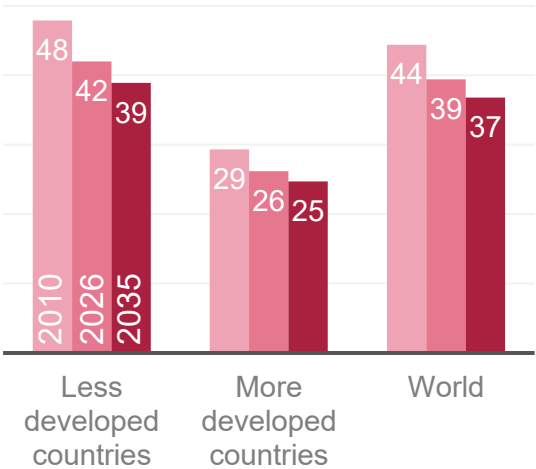
Youth population growth will come from emerging markets

While the population size of youth under 25 is still inching up in less developed markets, it is forecast to continue to decline in more advanced economies.

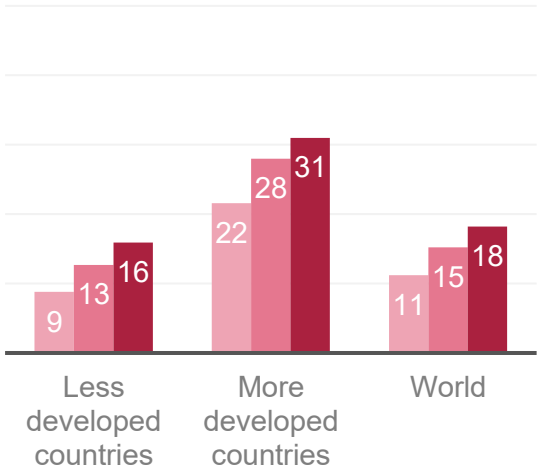
Changes are accelerating in less developed markets

While developed markets lead on population aging, shifts are happening faster in developing countries. The 60+ population is expected to grow by about 36% by 2035 in less developed markets, vs. 11% in more developed ones. Meanwhile, the share of the < 25 population will drop to 39% of the total population, down from 42% in 2026 and nearly half in 2010.

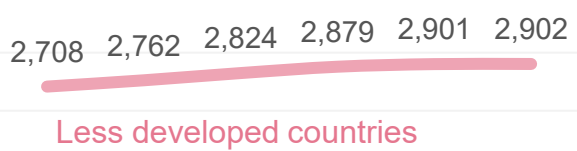
% of population < age 25



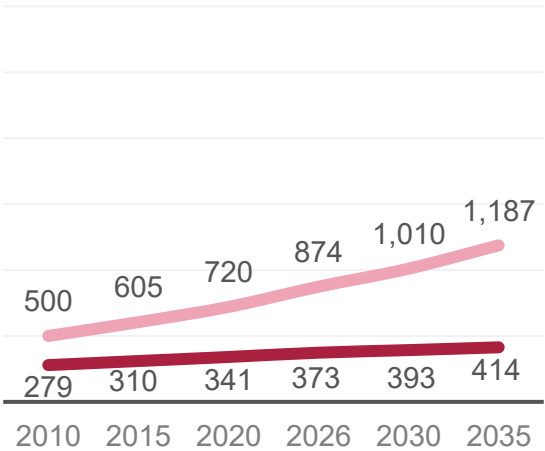
% of population 60+



Population size of those < 25, in millions



Population size of those 60+, in millions



Fewer children as fertility rates plunge to record lows

The global fertility rate falls to 2.3, the lowest in recorded history and less than half its 1950 level, as nations across the globe report historic lows in births. About 71% of the world’s population now lives in countries with birth rates below the replacement level needed to maintain population size.

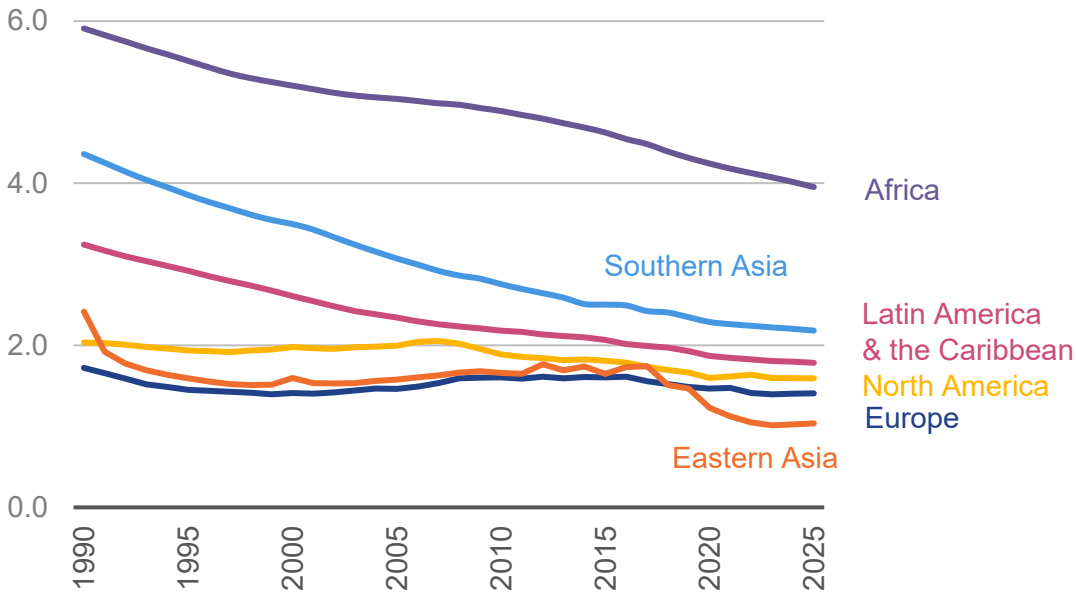
The traditional nuclear family is not the default

In 2025, couples with children still made up the largest group, but their share is set to fall from 36% of households to 33% by 2040. In developed markets like the US and UK, this figure is already below 20%.

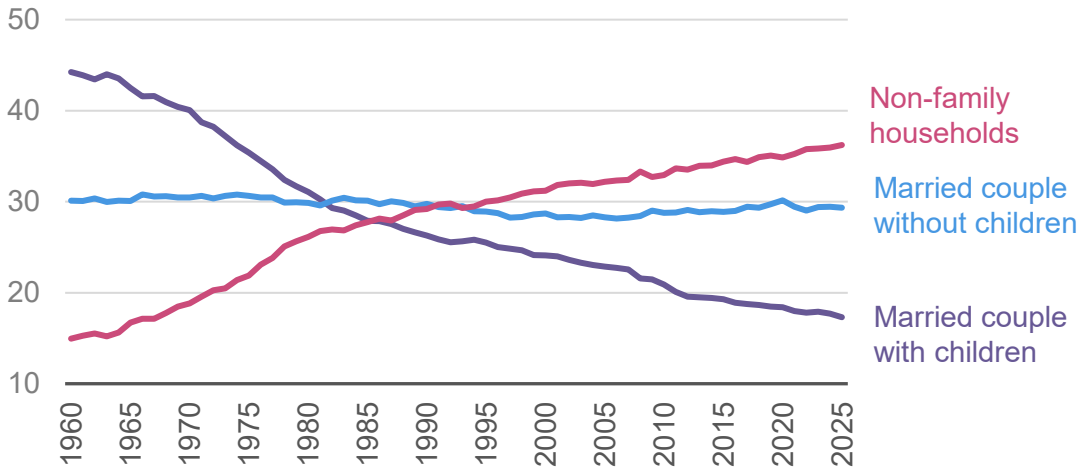
Single-person households see fast growth and new momentum

Living solo soared over the past two decades. In 2023, single person households globally accounted for one fifth of all households. From 2023 to 2040, these households are projected to grow by 48% in absolute terms, outpacing the growth rate of all other household types. In 2025, single-person households surpassed couples without kids to become the most popular type of household in the U.S.

Total fertility rates, 1990-2025



% of American households



[Falling fertility rates spark warnings of population decline](#), [The fertility rate of every country in the world](#), [UN | Data Portal](#), [Rethinking family: s drive consumer growth](#), [Top three trends in households](#), [Census-Family by presence of children.xls](#), [Census-Family vs. non-family households.xls](#), [Census-Household size.xls](#)

Internet penetration reaches a new high, yet growth has slowed

As of April 2026, 73.8% of the global population were estimated to be using the internet. This is up substantially from a decade ago (42.8%) but barely changed from a year before (73.7%).

5G now covers more than half of the global population

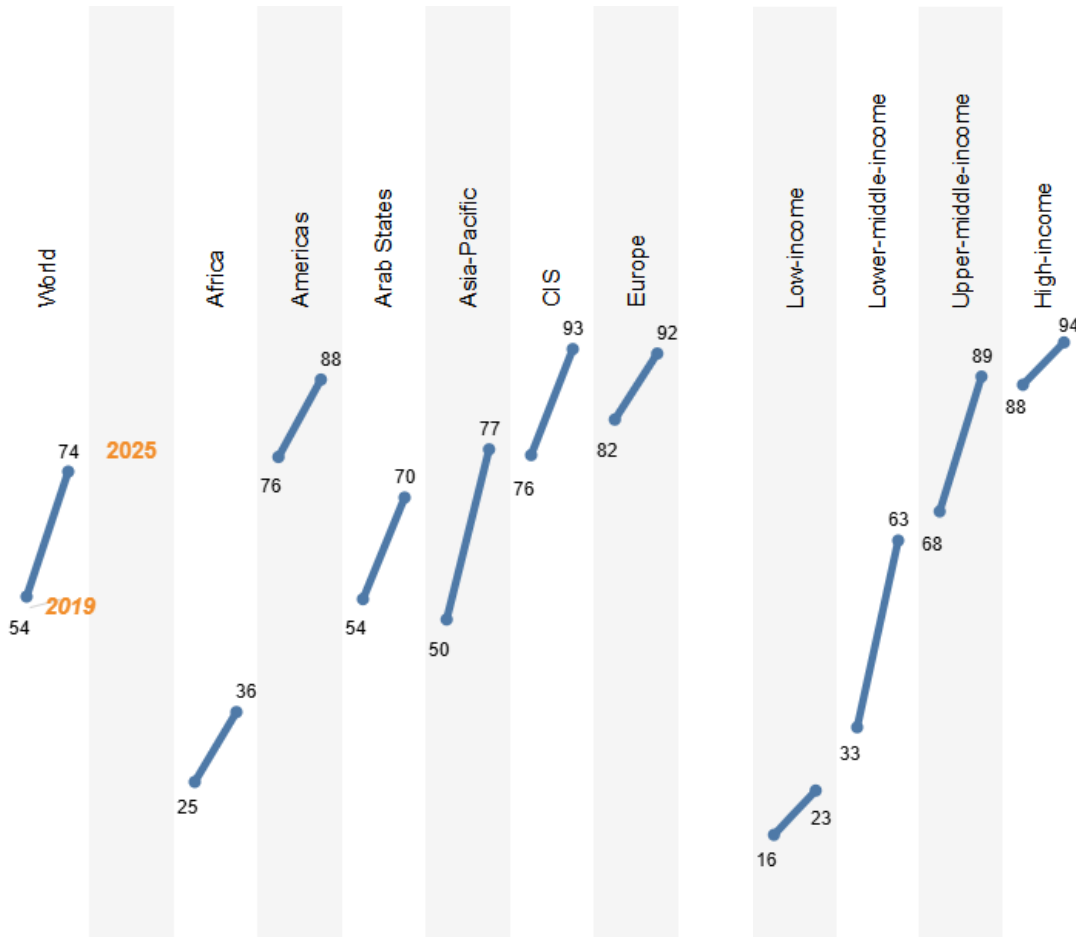
From the early stages of commercialization in 2019, 5G coverage has expanded to cover 55% of the world’s population in 2025. Regionally, Europe leads with 74% of the population covered by 5G, followed by the Asia-Pacific region with 70%, and the Americas region with 60% of the population covered by 5G.

Digital divide persists

Internet use remains closely linked to the level of development. High-income countries are nearing universal internet use with 94% of the population using the Internet. In contrast, only 23% of the population of low-income countries are using the internet. Similarly, 5G currently reaches 84% of people in high-income countries, compared with only 4% in low-income countries

The digital divide also remains substantial between urban and rural populations despite modest progress in recent years. 85% of urban dwellers used the internet in 2025, compared to just over half of the rural population (58%). The urban-rural gap, measured as the ratio of the two percentages, has slowly decreased from 1.6 to 1.5 between 2019 and 2025. The gap is wider in regions with relatively low overall Internet penetration.

Percentage of individuals using the internet by region and income, 2019 and 2025



[Internet penetration](#), [Internet usage](#)

Enterprise AI adoption accelerates

88% of global organizations surveyed by McKinsey & Co. reported regular AI use in at least one business function in 2025, compared with 78% in 2024. According to Deloitte, companies that adopted AI have broadened worker access to AI by 50% in 2025—growing from fewer than 40% to around 60% of workers now equipped with sanctioned AI tools. The rise of Chinese open-source, open-weight models helps drive adoption by bringing down the cost, gaining traction even among American companies.

Agentic AI emerges as the next wave

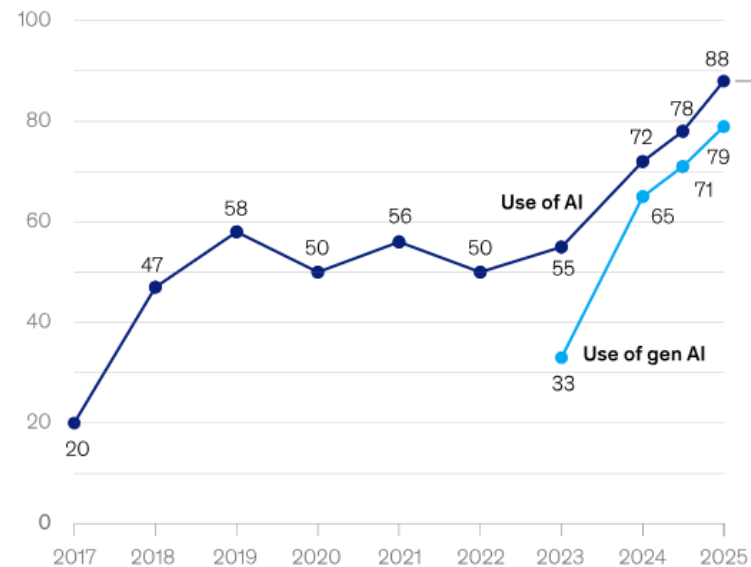
Artificial intelligence is evolving beyond static models into autonomous AI systems that can reason, plan, and act independently. According to Deloitte, today, 23% of companies are using agentic AI at least moderately. However, within the next two years agentic AI is expected to become nearly ubiquitous, with nearly 3 in 4 companies (74%) using it at least moderately, 23% using it extensively, and 5% fully integrating it as a core component of their operations.

Robotics and physical AI see continued progress

For example, self-driving car development has moved past the research stage in several markets, with commercial services now operating at scale. As of spring 2026, Waymo was providing 500,000 paid robotaxi rides every week across 10 U.S. cities, tenfold the number two years before. In China, Baidu’s Apollo Go autonomous ride-hailing service provided approximately 11 million fully driverless rides in 2025, a 175% year-over-year increase.

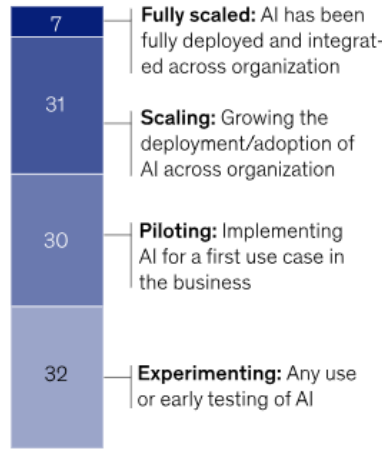
[McKinsey | The state of AI in 2025](#), [Deloitte | State of AI in the enterprise](#), [Four trends in AI experimentation, adoption, and Transformation](#), [Chinese AI models are gaining ground](#), [Waymo’s skyrocketing ridership in one chart](#), [Artificial Intelligence Index Report](#)

Use of AI by respondents’ organizations, % of respondents
Organizations that use AI in at least one business function



¹In 2017, the definition for AI use was using AI in a core part of the organization’s business or at scale. In 2018–19, the definition was embedding at least 1 AI capability in business processes or products. From 2020, the definition was that the organization has adopted AI in at least 1 function, and in 2025, the definition was regular use of AI in at least 1 function.
Source: McKinsey Global Surveys on the state of AI, 2017–25

Phase of AI use among organizations using AI in 2025



“

AI is not just another technology wave. It’s a catalyst that is fundamentally transforming how we work, collaborate, and innovate. Unlike past tech revolutions, when the challenge was simply to adopt new tools, today’s AI reality demands that organizations rethink their very processes, methods, and even the nature of business.

—Harvard Business Review, Mar. 2026

Global economy in crosscurrents of war and technology

According to the World Economic Outlook Update, released by the International Monetary Fund in early July, global growth is projected to be 3.0% in 2026 and 3.4% in 2027, down from the average of 3.5% observed in 2024–25, and slightly below the April projection. While the conflict in the Middle East is weighing on growth, stronger demand driven by advances in AI and the broader technology cycle is helping offset some of the impact.

Outcomes vary significantly by country: energy exporters and economies positioned in the technology chain are benefiting, while many energy-importing countries with limited exposure to the tech boom continue to face weaker growth prospects – a group that includes many low-income countries.

The Iran war has reignited inflation pressure

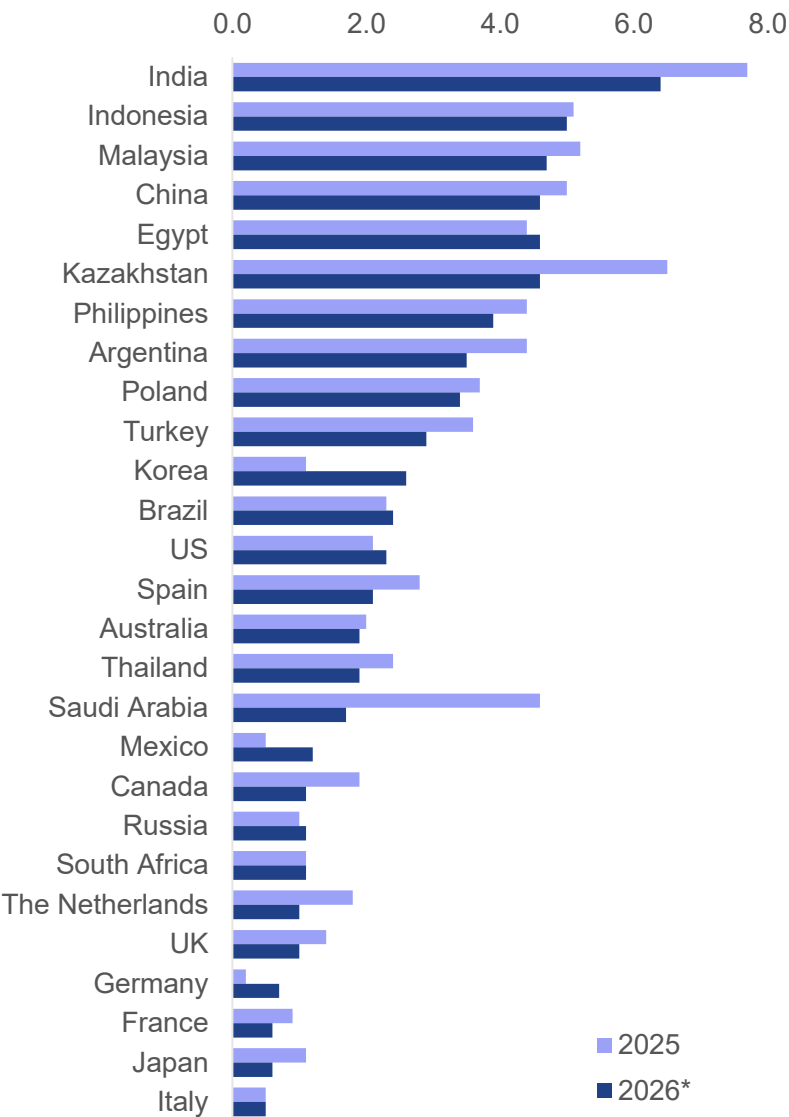
According to the July update from the International Monetary Fund, global inflation is expected to rebound in 2026 after declining in previous years. Headline inflation is projected to rise from 4.1% in 2025 to 4.7% in 2026 before easing to 3.9% in 2027, with the increase for 2026 driven mainly by higher energy and food prices.

Inflation dynamics are expected to remain uneven across countries, reflecting differences in exchange rate pass-through, the persistence of services price inflation, labor market conditions, and the growing importance of country-specific factors.

Global affordability crisis goes beyond inflation

A housing shortage continues to push home prices and rents well above wage growth in many nations, with an estimated 80% of cities worldwide lacking affordable housing options for most residents. At the same time, healthcare costs continue to rise sharply, with global health insurance costs projected to increase by 10% in 2026 alone. In late August, long-term borrowing costs in some of the world’s biggest economies reached a record high, potentially exacerbating the affordability crisis by making loans more expensive for consumers.

Real GDP growth, % change



[World Economic Outlook 2026 July](#), [Sustainable and Affordable Housing Report](#), [Healthcare cost projected to rise 10% in 2026](#), [Global borrowing costs hit fresh highs](#), [High debt, hard choices](#), *forecast

Competition for critical minerals accelerates

The AI data center boom, defense needs, and electric vehicles are driving up the demand for critical metals. Reflecting tight supply conditions, base metals like copper and aluminum surged one-third in price between January 2025 and April 2026, with lithium prices more than doubling and cobalt spiking 130%.

Supply concentration in refining continued to edge higher for most minerals in 2025. Over the past two years, the top refining countries – Indonesia for nickel and China for other key energy minerals – accounted for over three quarters of total growth in refined supply.

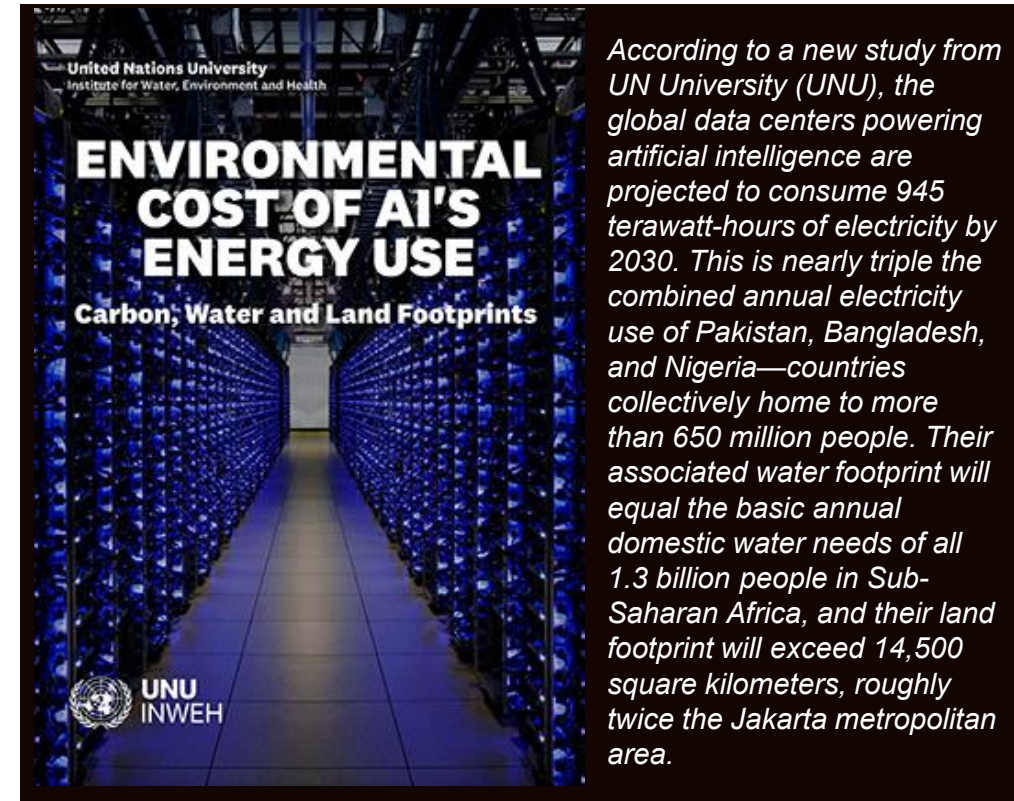
World enters era of “global water bankruptcy”

Nearly three-quarters of the world's population live in countries classified as water-insecure or critically water-insecure. Approximately 4 billion people experience severe water scarcity for at least one month each year, and more than 1.8 billion people were affected by drought conditions in 2022-2023. Drought-related losses, driven not only by rainfall deficits but also by land degradation, groundwater depletion, and climate change, already total an estimated US\$307 billion annually worldwide. The rapid expansion of AI infrastructure could further intensify water stress through its substantial water consumption.

The world is facing a profound energy crisis

Electrification, AI data centers, electric vehicles, air conditioning, and industrial growth are expected to drive sustained increases in global energy demand, despite a temporary slowdown caused by higher fuel costs following the closure of the Strait of Hormuz. The International Energy Agency projects global electricity consumption to rise from 28,600 terawatt-hours (TWh) in 2025 to 30,700 TWh by 2027. Rising demand comes as oil markets remain strained, with global inventories falling by 69 million barrels in July 2026 alone, bringing cumulative stock drawdowns since the Iran conflict to 410 million barrels. At the same time, renewables are strengthening energy security and are expected to become the world's largest source of electricity generation in 2026, surpassing coal after reaching near parity in 2025.

[Global Critical Minerals Outlook 2026](#), [Global water bankruptcy](#), [AI Is Threatening Natural Resources for Billions](#), [US power use to beat record highs in 2026 and 2027 as AI use surges](#), [Global electricity demand growth set to accelerate](#), [Oil Market Report - August 2026](#)



According to a new study from UN University (UNU), the global data centers powering artificial intelligence are projected to consume 945 terawatt-hours of electricity by 2030. This is nearly triple the combined annual electricity use of Pakistan, Bangladesh, and Nigeria—countries collectively home to more than 650 million people. Their associated water footprint will equal the basic annual domestic water needs of all 1.3 billion people in Sub-Saharan Africa, and their land footprint will exceed 14,500 square kilometers, roughly twice the Jakarta metropolitan area.

U.S. power consumption, which hit its second straight annual record high in 2025, will rise further in 2026 and 2027, driven by AI-hungry data centers and electrification, the Energy Information Administration said.

Conflicts reached a historic high

According to researchers at the Uppsala Conflict Data Program (UCDP) at Uppsala University, there were 65 state-based conflicts in 2025, the highest number recorded since World War II. An estimated 244,600 people were killed in organized violence, making 2025 the deadliest year since the 1994 Rwandan genocide and one of the most violent years on record. According to the Institute for Economics & Peace (IEP), global peacefulness deteriorated for the 12th consecutive year, with 99 countries experiencing a decline in peacefulness over the past year.

The Iran war has profound impact

The IEP estimated in June that the annual global GDP losses from the war could total up to US\$3.5 trillion. Beyond its direct economic costs, the conflict has intensified concerns over energy security, supply chain resilience, and regional stability. It may also accelerate investment in alternative energy sources and diversification strategies as governments and businesses seek to reduce exposure to geopolitical shocks.

A multipolar, fragmented world order is emerging

68% of global leaders and experts interviewed by The World Economic Forum describe the global political environment over the next 10 years as a “multipolar or fragmented order in which middle and great powers contest, set, and enforce regional rules and norms.” The Iran war may reinforce this trend by encouraging greater strategic autonomy among regional powers and increasing uncertainty around traditional alliance structures.

“Declining trust, diminishing transparency and respect for the rule of law, along with heightened protectionism, are threatening longstanding international relations, trade and investment and increasing the propensity for conflict.”

—The World Economic Forum, Jan. 2026

“We are seeing a clear increase in conflicts between states. For a long time, interstate wars were relatively rare, but developments in recent years point to growing international tensions and a changing global security order.”

—Shawn Davies, senior analyst, Uppsala Conflict Data Program (UCDP) at Uppsala University

“For the first time in history, machines are making life-and-death combat decisions faster than any human can review them, and the international frameworks meant to govern them barely exist.”

—Vision of Humanity, Jun. 2026

[Conflicts are on the rise globally, at the highest level since WWII](#), [Record conflicts drive peace to historic low as AI warfare surges](#), [The U.S.-Iran war: by the numbers](#), [Global Risks Report 2026](#), [The Iran War Permanently Altered the Global Economy](#), [Global Peace Index 2026](#), *state-based conflicts are conflicts where at least one of the parties is the government of a state

Government regulations have a substantial impact on numerous aspects of business operations across the globe. Below are several examples of regulatory areas that have gained significant momentum over the past year.

Tariffs endure despite legal challenges

The tariffs enacted by the Trump administration in 2025 raised the average U.S. tariff rate to its highest level since 1947. Although the U.S. Supreme Court's February 2026 ruling invalidated tariffs imposed under the International Emergency Economic Powers Act (IEEPA) and triggered more than \$100 billion in refunds, the administration has since introduced new tariffs. This shift reflects a move away from broad emergency-based measures toward more legally durable policy tools, including national security reviews, industrial policy initiatives, export controls, and sector-specific trade actions.

Experts argue that the reintroduction of tariffs signals the White House's intention to preserve import levies as a lasting feature of U.S. economic policy.

AI regulation enters the enforcement era

AI regulation has evolved from broad principles to enforceable requirements. The most significant development has been the European Union's implementation of the AI Act, widely regarded as the world's first comprehensive, risk-based framework for regulating artificial intelligence. The Act went into force on August 1, 2024, and became fully applicable by August 2, 2026, with some exceptions.

Meanwhile, Asia emerged as a major regulatory center: South Korea adopted the region's first comprehensive AI framework law, introducing requirements for "high-impact" AI systems and generative AI transparency, while China expanded its governance regime through mandatory AI-generated content labeling and new security standards for generative AI systems.

Social media faces a regulatory reckoning

Governments around the world are tightening restrictions on children's use of social media. In December 2025, Australia set a global precedent by implementing a first-of-its-kind requirement for social media platforms to prevent users under 16 from holding accounts. Similar measures are being considered or advanced across several jurisdictions, including Austria, Denmark, the European Union, the United Kingdom, Indonesia, and Malaysia.

In late August, Meta reached a landmark settlement of nearly \$17 billion with a coalition of US state attorneys general to resolve federal allegations that it designed addictive platforms that intentionally fueled a youth mental health crisis. As a part of the settlement, Meta has agreed to "make massive transformations that will reduce the risk of harm from its platforms."

Environmental regulations diverge across key markets

On the one hand, the US has moved sharply toward federal deregulation, with the Environmental Protection Agency (EPA) initiating broad rollbacks and reconsidering climate, emissions, and energy-related rules. Meanwhile, US states such as California continue advancing mandatory climate disclosure requirements for large companies. Other nations largely are moving towards more regulation and greater corporate accountability, with the EU refining but retaining its sustainability reporting framework, Australia launching mandatory climate disclosures, and China embedding green considerations into its economic framework and introducing stronger accountability mechanisms.

[Trump admin refunds \\$100 billion in 'liberation day' tariffs](#), [Why Trump's new tariff blitz is very different this time around](#), [Tracking the Impact of the Trump Tariffs & Trade War](#), [5 nations leading the global race in ai regulation](#), [Which countries have banned social media for kids?](#), [States to take Meta to trial in California](#), [EPA launches biggest deregulatory action in U.S. History](#), [Final Rule: Rescission of the Greenhouse Gas Endangerment Finding](#), [California corporate greenhouse gas reporting](#), [EU Omnibus package](#), [European Sustainability Reporting Standards \(ESRS\)](#), [Commonwealth Climate Disclosure](#), [What China's new Ecological and Environmental Code means](#), [Meta settles social media addiction case](#)

Appendix: Methodology



Nationally representative of
the online US population

Fieldwork: January-February 2026



Sample of adults 18 years of age and over in the United States are interviewed for this study using a mix of online consumer panels.



All demographic groups are represented, based on the latest population statistics derived from the United States Census Bureau. Quotas are imposed to ensure representation for each age bracket within gender, education level, as well as income, geographic region, and ethnicity.



Panel blend of online and mobile providers in the US.

2026 NIQ Consumer Life Roper Reports® Global study at-a-glance

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Sample: Between 1000 and 2000 per market

Fieldwork January-April 2026

Argentina*	China*	Hungary	Mexico*	Saudi Arabia	Turkey
Australia*	Colombia	India*	Netherlands	Singapore	UAE
Austria	Ecuador	Indonesia*	Peru	South Africa*	UK*
Belgium	Egypt	Italy*	Philippines	South Korea*	USA*
Brazil*	France*	Japan*	Poland	Spain*	
Canada*	Germany*	Kazakhstan	Romania	Switzerland	
Chile	Greece	Malaysia	Russia*	Thailand	



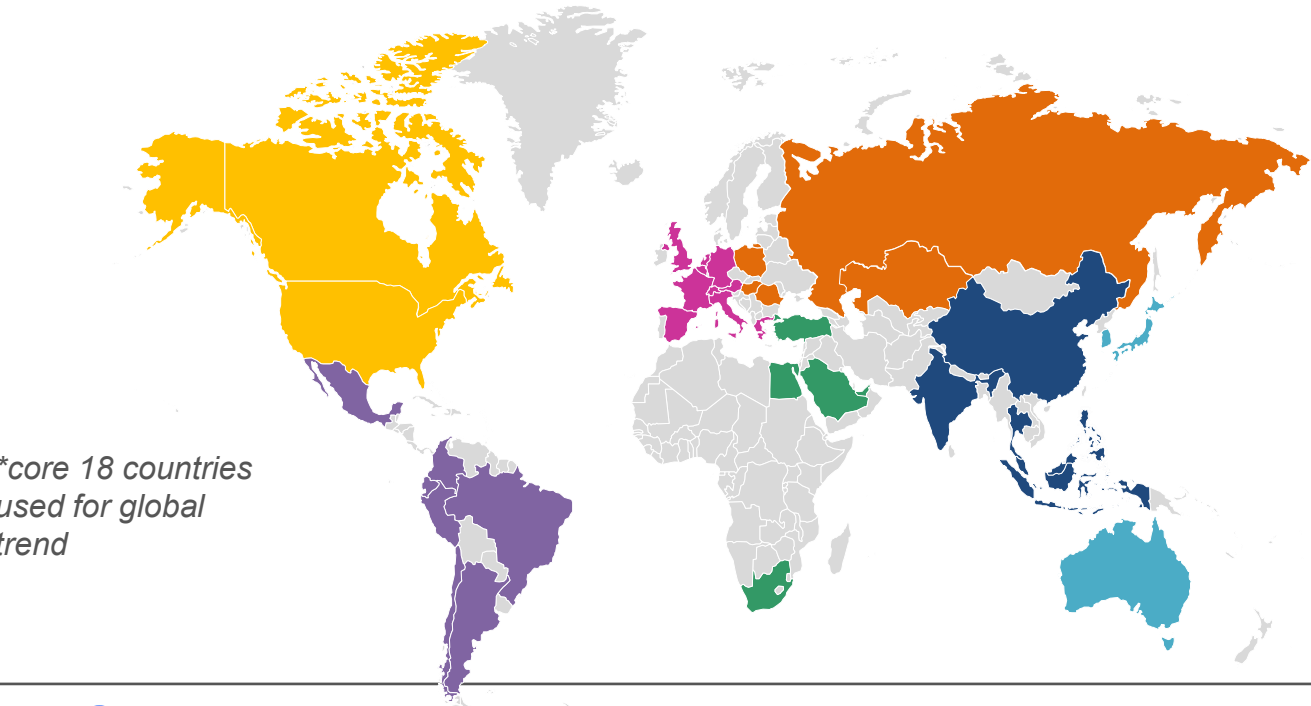
39 Markets

7 Regions: North America, Latin America, Western Europe, Central/Eastern Europe, Middle East/Africa, Developing Asia, Developed Asia



Online

Panel blend of 4-6 online providers for each market



**core 18 countries used for global trend*

2026 NIQ Consumer Life Global

Fieldwork date by country

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	Fieldwork Launched	Fieldwork Completed
Argentina	23-Jan	24-Mar
Australia	20-Jan	24-Mar
Austria	23-Jan	25-Mar
Belgium	23-Jan	19-Mar
Brazil	20-Jan	26-Mar
Canada	22-Jan	2-Apr
Chile	27-Jan	6-Mar
China	22-Jan	1-Apr
Colombia	27-Jan	6-Mar
Ecuador	27-Jan	18-Mar
Egypt	27-Jan	12-Mar
France	20-Jan	23-Mar
Germany	20-Jan	25-Mar
Greece	22-Jan	8-Mar
Hungary	27-Jan	27-Mar
India	20-Jan	24-Mar
Indonesia	20-Jan	6-Mar
Italy	20-Jan	16-Mar
Japan	20-Jan	27-Mar
Kazakhstan	23-Jan	11-Mar

	Fieldwork Launched	Fieldwork Completed
Malaysia	20-Jan	18-Mar
Mexico	26-Jan	25-Feb
Netherlands	20-Jan	22-Mar
Peru	27-Jan	12-Mar
Philippines	22-Jan	23-Mar
Poland	20-Jan	26-Feb
Romania	22-Jan	12-Mar
Russia	22-Jan	28-Mar
Saudi Arabia	27-Jan	7-Apr
Singapore	27-Jan	26-Mar
South Africa	20-Jan	6-Mar
South Korea	20-Jan	12-Mar
Spain	28-Jan	17-Mar
Switzerland	23-Jan	27-Mar
Thailand	20-Jan	23-Mar
Turkey	20-Jan	24-Mar
UAE	22-Jan	7-Apr
UK	13-Jan	27-Mar
US	2-Feb	9-Apr
Malaysia	20-Jan	18-Mar

Definitions

Generations

	Gen Alpha	Gen Z	Millennials	Gen X	Boom
Birth years	2013-?	1998-2012	1980-97	1965-79	1946-64
Age in 2026	<14	14-28	29-46	47-61	62-80