

RETHINKING BRAND AMERICA

How US studios and streamers can effectively navigate a rising global tide of anti-American sentiment

In early May, President Donald Trump sent shockwaves through the entertainment industry by announcing “a 100% Tariff on any and all Movies coming into our Country that are produced in Foreign Lands.”¹ While practical details of the scheme have yet to be announced, life could soon become a lot harder for American media companies looking to film content overseas or import international content to the US.

But what about the other side of the equation: studios and streaming companies looking to export American content to international markets?

Even before this latest announcement, global attitudes toward the United States had been souring. Trump’s re-election in 2024—and the foreign policy agenda he’s pursued since returning to office—has sparked a resurgence of anti-American sentiment in countries around the world.

For American entertainment companies, this poses a new kind of challenge: **how to navigate a climate in which “Brand America” may be more of a liability than an asset.**

This white paper draws on new global research from National Research Group to understand the entertainment industry’s exposure to the broader international backlash against American politics and institutions. We explore how attitudes toward the US have shifted across key international markets, how consumers are adjusting their behavior in response, and what American studios and streaming platforms can do to mitigate reputational risk while maintaining global relevance.

In an era when American businesses are increasingly under scrutiny abroad—in many cases, even becoming the targets of coordinated boycott campaigns—the entertainment industry finds itself

walking a fine line between cultural leadership and political baggage. How studios choose to walk that line could determine a lot more than just their global box office returns; it could have a profound impact on America’s cultural influence on the world stage.

METHODOLOGY

Unless otherwise specified, data in this report comes from a survey of approximately 12,000 consumers across 11 markets, conducted in two stages between April 21st and May 4th 2025, as part of NRG’s ongoing program of theatrical tracking.

In each market, we surveyed approximately 1,100 consumers aged 13 to 64 who had seen at least one movie in theaters over the past six months—with the exception of China, where we surveyed 1,000 consumers aged 18 to 54. In all markets, quotas were set to ensure an even split of male and female respondents.

Markets included:



1. Emma Saunders, “What impact might Trump’s Hollywood tariffs plan have?”, BBC News, May 5th, 2025



IN THIS REPORT, YOU'LL FIND...

- ✓ How the election of Donald Trump and the actions of his administration have impacted global perceptions of “Brand America”
- ✓ The effect of rising anti-American sentiment on consumers’ willingness to financially support American brands
- ✓ The potential impact of global boycotts on American movie studios, streaming platforms, and other entertainment companies
- ✓ How studios can position new releases in international markets to minimize the risk of backlash
- ✓ Key questions American entertainment companies need to ask themselves to chart a path forward internationally in today’s cultural climate

AT A GLANCE

The global outlook for America’s entertainment industry

THREE REASONS FOR PESSIMISM...

1 America’s global brand is in decline

With nearly half of global consumers saying their view of the US has worsened, American-made content risks being caught in the crossfire of geopolitical resentment.

2 Certain demographics are tuning out

Women and older consumers—groups with strong influence over household viewing habits—are leading the anti-American shift, making it harder to engage these audiences with explicitly American narratives and stories.

3 Global traffic for in-person cultural experiences is plummeting

As stories of tourist detentions and rising visa hurdles circulate, international travel to the US is declining—creating a major problem for media brands with significant revenue tied to theme parks, exhibitions, or other physical experiences.

...AND THREE REASONS FOR OPTIMISM

1 Entertainment remains America’s strongest form of soft power

Despite political tensions, US movies and TV shows still enjoy higher favorability ratings than almost any other American export—outperforming tech, retail, and even universities.

2 Boycotts aren’t targeting Hollywood (yet)

While many consumers are cutting back on American goods, comparatively few are avoiding American content, and the entertainment industry has so far remained relatively insulated from organized boycotts.

3 Effective marketing can help to de-emphasize the “American-ness” of content

For global audiences sensitive to American politics, small shifts in how content is framed—downplaying US settings, symbols, or cultural markers—can make a big difference. Marketers who localize effectively and emphasize universal themes can sidestep backlash and keep audiences engaged.



Across the globe, anti-American sentiment is surging

The election of Donald Trump in November 2024, and the political course he has charted since taking office in January, has had a profound impact on global perceptions of the United States.

Across the 11 markets included in this study, **46% of consumers surveyed by NRG reported that their opinion of the US had become more negative over the past six months**—more than four times the number (11%) who reported that their opinions of the country had improved over the same time period.

Of these markets, Australia showed the strongest evidence of anti-American sentiment, with 54% of consumers saying their attitudes toward the US had soured in recent months. Indeed, anti-Trump sentiment has been widely credited as playing a key role in helping the Australian Labor Party secure a landslide re-election victory in the country's recent elections.²

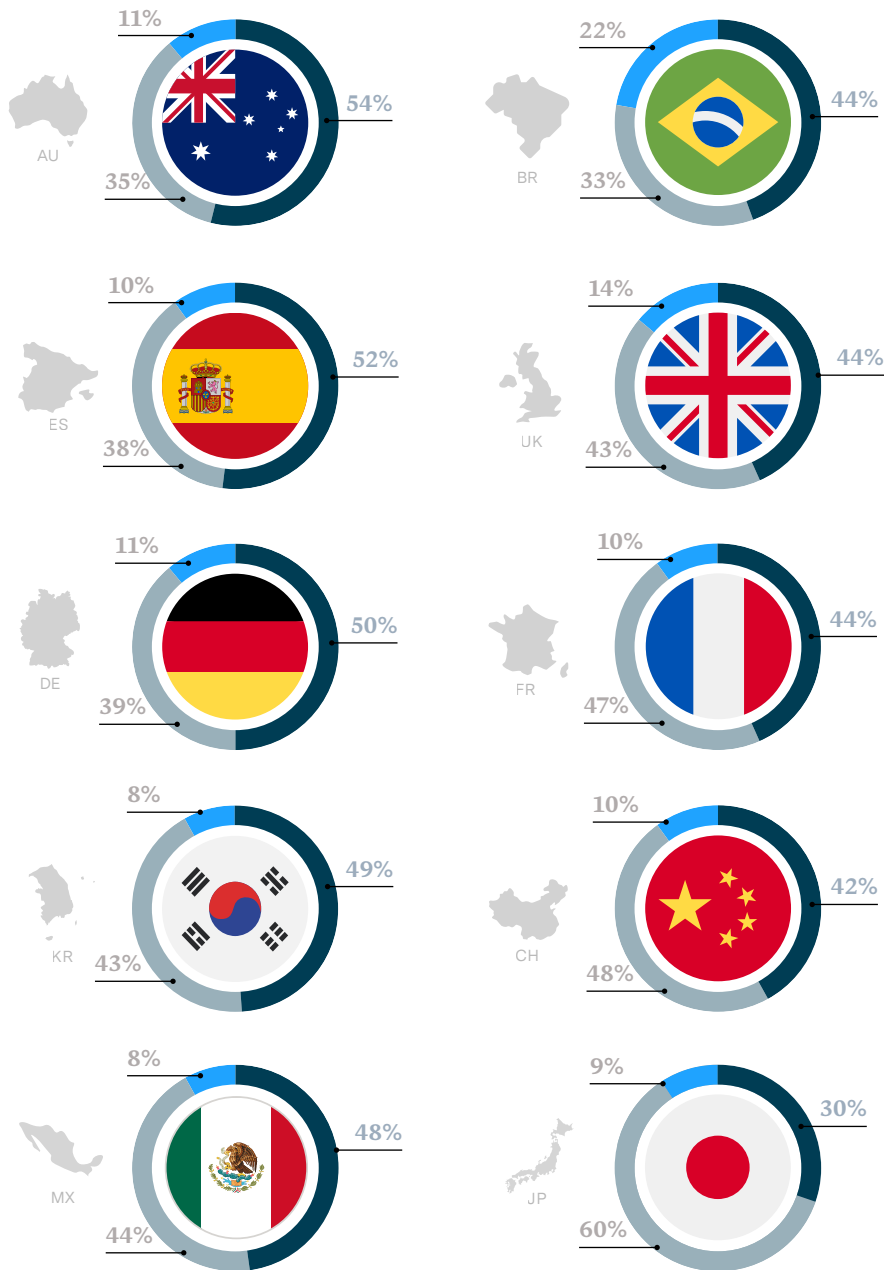
But Australians were far from alone in their disapproval of America's recent political trajectory. In Spain and in Germany as well, at least half of consumers said that their views toward the US were becoming more negative. In the latter case, this may represent a backlash against perceived political interference, following expressions of support from members of the Trump administration—including Elon Musk and Vice President JD Vance—for the country's controversial Alternative für Deutschland (AfD) party.³

2. Rituparna Chatterjee, "Australia's re-elected government says 'dark shadow' of US-China trade war top priority," The Independent, May 4th, 2025

3. Deborah Cole and Helen Sullivan, "Elon Musk congratulates AfD's Alice Weidel on far-right gains in German election," The Guardian, February 24th, 2025

Q: HOW HAVE YOUR OPINIONS TOWARD THE US CHANGED OVER THE PAST SIX MONTHS?

- More **negative** toward the US
- No change
- More **positive** toward the US



Despite regional variation, there's a global consensus that America is becoming a more hostile actor on the world stage

On the other end of the spectrum, consumers in Japan were, by a substantial margin, the least likely to have changed their views toward the US over the past six months. As one of the few countries to have seen diplomatic relations with the US generally improve during Trump's first term in office—due, in part, to the close personal relationship between the president and former Japanese PM Shinzo Abe⁴—it's possible that the Japanese are more optimistic than most about their government's ability to work with the Trump administration and find ways to minimize the impact of tariffs.



Brazil, meanwhile, was the only market surveyed where more than a fifth

of consumers reported that their perceptions toward the US had actually *improved* over the past six months. It's likely not a coincidence that Brazil is also a country whose own politics have been heavily influenced by Trumpism: Jair Bolsonaro, the so-called “Trump of the tropics,”⁵ only narrowly lost re-election in 2022, and recent municipal election results suggest he still has a broad base of political support in the country, despite being banned from running for office until 2030.⁶

Given that Bolsonaro continues to be a vocal supporter of Trump and his agenda, it's easy to see why some of his supporters would see recent political events in the US as a source for optimism—a roadmap, even, for how their country's own brand of right-wing populism could reassert itself on the national stage.⁷



Q: HOW DO YOU THINK THE US HAS CHANGED OVER THE PAST SIX MONTHS?

ALL MARKETS

The US has become...

more **democratic**

19% 33%

The US has become...

more **authoritarian**

48%

more **respected** around the world

22% 31%

less **respected** around the world

48%

more focused on **preventing and defusing** global conflicts

22% 31%

more likely to **provoke or escalate** conflicts

47%

more **welcoming** to people from my country who want to live, work and study there

19% 35%

more **hostile** to people from my country who want to live, work, and study there

45%

more **connected** to the rest of the world

22% 33%

more **isolated** from the rest of the world

46%

more **economically stable**

22% 34%

more **economically unstable**

45%

safer to travel to

21% 39%

more **dangerous** to travel to

40%

more **innovative** and creative

23% 39%

less **innovative** and creative

37%

more **influential** in global affairs

36% 34%

less **influential** in global affairs

31%

● Neutral / unsure

4. Motoko Rich, “Lessons for World Leaders From Japan’s Former Trump-Whisperer,” The New York Times, November 7th, 2024

5. Vincent Bevins, “Trumps of the Tropics: Brazil’s Far Right Plots Its Return,” The New York Times Magazine, August 1st, 2024

6. “Bolsonaro’s right-wing party makes significant gains in Brazil’s municipal elections,” France24, October 7th, 2024

7. “Bolsonaro hoping Trump’s return will help political comeback in Brazil,” Al Jazeera, November 29th, 2024

Among Trump's policies, the "reciprocal tariffs" have been the biggest driver of global backlash

Globally, tariffs were the most frequently cited explanation among consumers who said their feelings toward the US had become more negative over the last six months.

Understandably, consumers outside the US are generally viewing the Trump administration through the lens of its immediate impact on global economic uncertainty and their financial well-being—rather than preoccupying themselves with Trump's domestic policies or his impact on America's internal political institutions.

There were, however, some significant regional differences in the factors underpinning recent anti-American backlash:

TOP REASONS FOR ANTI-AMERICAN SENTIMENT

ALL MARKETS, CONSUMERS WHO FEEL MORE NEGATIVELY TOWARD THE US NOW THAN SIX MONTHS AGO

01	The imposition of new tariffs by the Trump administration	42%
02	The election of Donald Trump as president in November 2024	35%
03	The Trump administration's policies on race, gender, and civil rights	26%
04	Disrespect shown by members of the Trump administration toward my country	25%
05	The Trump administration's treatment of immigrants	23%



UK:

Among the markets surveyed for this research, respondents in the UK were the most likely to point to the increasing influence of **Elon Musk** in American politics as an important factor in their feelings toward the US.



France, Germany, Italy, Spain:

In these European markets, the tariffs were just one among many important factors driving anti-American sentiment. Consumers here pointed to a range of issues to explain their views, such as the Trump administration's positions on **civil rights** and **climate change** as well as recent American interventions in the **war in Ukraine**.



China, South Korea, Japan:

Consumers in Asian markets were the most likely to cite **tariffs** as a reason for negative sentiment toward the US, reflecting the importance of US-bound exports for the region's economy.⁸



Brazil, Mexico:

The Trump administration's **treatment of immigrants** was most salient in these two Latin American markets. The issue was mentioned by 40% of respondents in Brazil and 47% in Mexico, putting it almost on par with the tariffs in terms of relative importance in these markets.

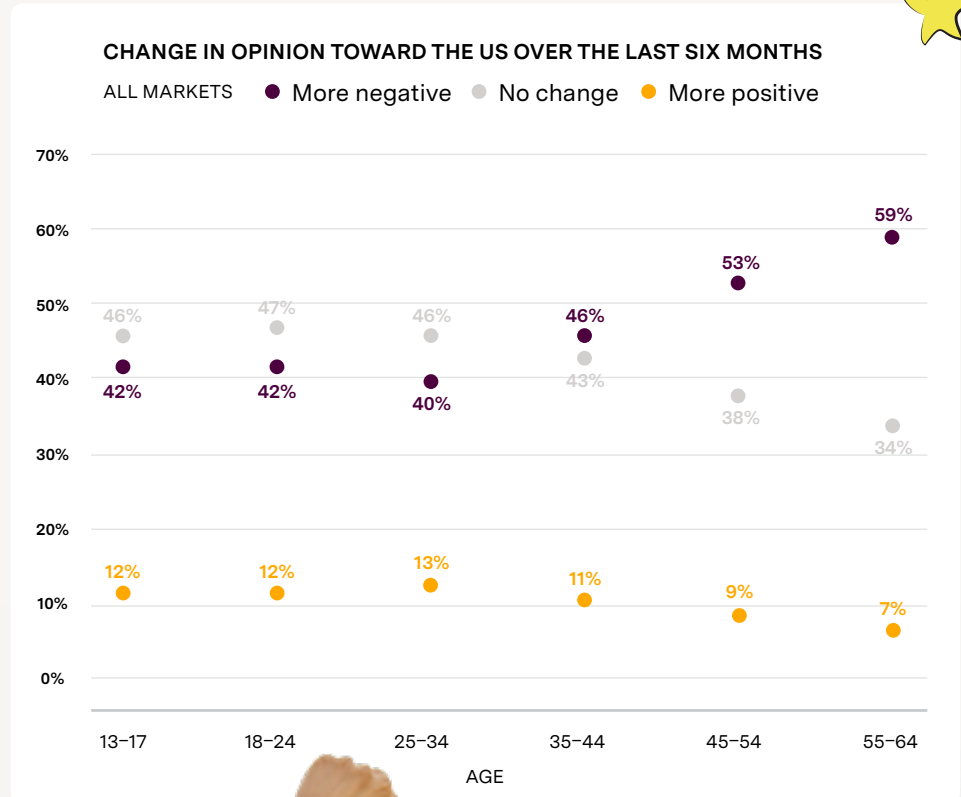
8. Sylvia Ma, "How dependent are these 6 major Asian economies on the US market?", South China Morning Post, April 9th, 2025

So far, global backlash has been strongest among women and older consumers

Not all consumers, however, are embracing this mood of anti-American fervor to the same extent. Across almost all the markets surveyed for this research, women were more likely than men to say that their opinions of the US had worsened over the past six months—reflecting global trends of political polarization between the sexes.⁹

And in most markets, anti-American sentiment has increased most rapidly among Boomers and Gen X, and slowest among Millennials and Gen Z. In this regard at least, Trump's second term is playing out similarly to his first: a Pew Research study in 2017 also found that favorable views toward the US around the world were dropping fastest among older generations.¹⁰

These findings are also consistent with recent electoral data that suggests that, in many markets, it's younger Gen Z men who are among the most open to the particular brand of right-wing populist politics represented by Trump and his allies—and who have been the main drivers of recent gains by insurgent “Trumpist” parties internationally.¹¹



9. Jonathan Yerushalmy, “What’s behind the global political divide between young men and women?,” *The Guardian*, November 14th, 2024

10. Richard Wike, Bruce Stokes, Jacob Poushter, and Janell Fetterolf, “1. The tarnished American brand,” *Pew Research Center*, June 26th, 2017

11. Hanne Cokelaere, “It’s not just boomers, young people are voting far right too,” *Politico*, May 29th, 2024



Global consumers are voting with their wallets, making a conscious effort to limit their spending with US brands

What's more, this rising tide of anti-American sentiment is beginning to have a tangible impact on consumers' purchasing decisions. Globally, almost 3 in 10 consumers (29%) surveyed for this research said that they were now making a conscious effort to avoid buying American goods and using American services, while an additional 39% said they would be open to doing so in the future if relations between the US and their country continued to deteriorate. If the Trump administration doubles down on the tariffs and continues to antagonize other nations, we could soon be looking at a scenario in which almost 7 in 10 global consumers are trying to limit consumption of American products.

In many markets, Trump's trade wars have already prompted the emergence of coordinated campaigns to encourage consumers to "buy local" and avoid supporting American businesses.

In some cases, these campaigns have emerged organically through grassroots movements on social media, while in others, they have been tacitly or explicitly promoted by local political leaders. The provincial government of Quebec, for example, recently invested over \$300,000 in a Trump-themed marketing campaign encouraging Quebecers to prioritize buying from locally-owned businesses.¹²

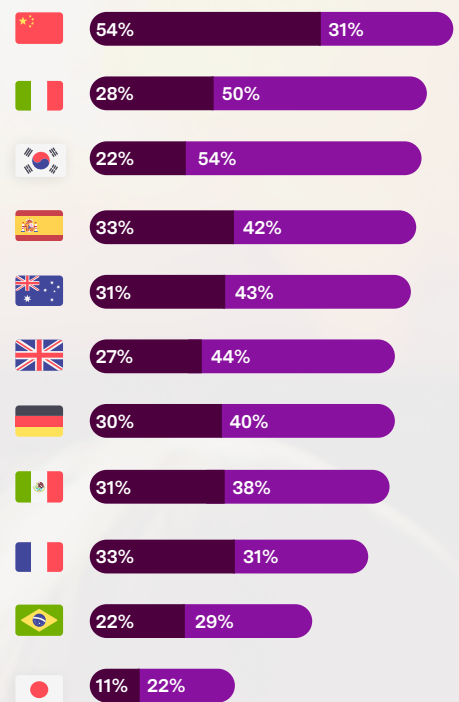
Appetite for such boycotts appears to be particularly high in China, where over half (54%) of consumers say they're already reducing their consumption of American products. Aware that their country is the biggest target in the Trump administration's economic crosshairs, Chinese social media users have been more vocal than most in calling for economic retaliation.

On Douyin, users began advocating for a boycott almost as soon as the tariffs were unveiled: the patriotic "This is China's attitude" hashtag received almost a billion views in the days after Trump's announcement, often accompanied by AI-generated memes critical of Trump and his administration.¹³ Influential Chinese bloggers quickly began calling on their government to impose new restrictions on American cultural imports¹⁴—and indeed, the China Film Administration soon announced plans to further limit the number of American releases allowed to open in the market.¹⁵



Q: ARE YOU CURRENTLY TRYING TO BUY FEWER AMERICAN PRODUCTS AND CONSUME LESS AMERICAN MEDIA?

- Already trying to reduce consumption
- Open to doing so in the future

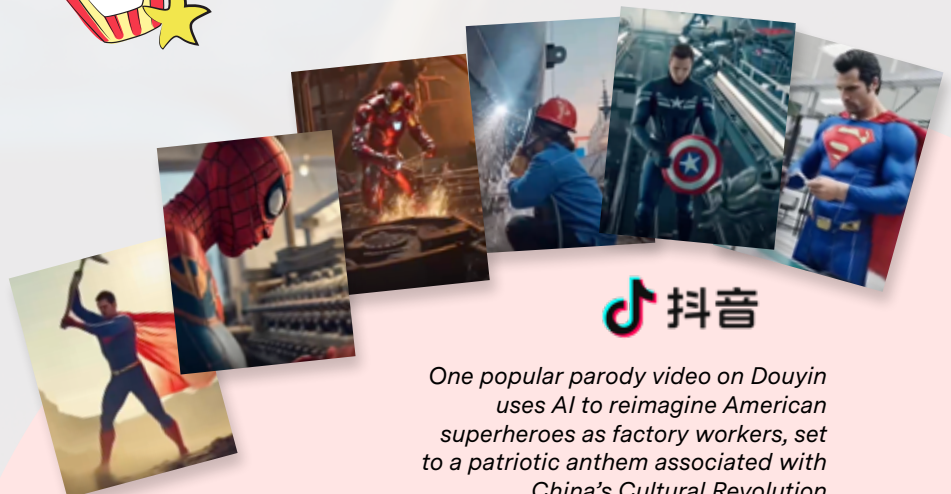


12. Antoni Nerestant, "Quebec takes swipe at Trump in new buy local ad campaign," CBC News, April 10th, 2025

13. Kai Feng and Bang Xiao, "This is China's attitude": Chinese netizens mock US tariffs with memes," ABC, April 11th, 2025

14. "Influential Chinese Bloggers Hint at Possible China Retaliation Against U.S. Tariffs," MarketWatch, April 8th, 2025

15. Catherine Shoard, "China to restrict US film releases after Trump's tariff hike," The Guardian, April 10th, 2025



One popular parody video on Douyin uses AI to reimagine American superheroes as factory workers, set to a patriotic anthem associated with China's Cultural Revolution

Consumers are likely to cut back spending elsewhere before curtailing their consumption of American media

The good news for American movie studios and streaming companies, however, is that their core offerings are not the ones where international consumers plan to cut back their spending first.

Globally, only 16% of respondents said that they were now less likely to go out and watch an American movie in a theater; the same percentage said that they had become less interested in watching American movies and TV shows at home. That's substantially lower than the percentage who said that they were now less likely to spend their money on American fashion brands, American food and beverage brands, and American technology products such as smartphones or computers.

Certainly, there have been scattered reports in some markets of consumers boycotting American movies or cancelling their subscriptions to American-owned streaming services in protest against the Trump administration's policies.¹⁶

But this data suggests that, for now at least, **brands like Nike, Starbucks, and McDonald's are more likely to become the focal points of global anti-American energies than US movie studios or streaming services.** While some consumers who were already thinking about cancelling a streaming subscription may see this moment as motivation to take that final step, the chance of an organized boycott campaign gaining sustained traction is lower than it is for most other sectors.

Arguably, the American media brands most economically exposed to rising anti-Americanism abroad will be those for whom theme parks and other in-person experiences make up a significant portion of their revenue.

High-profile news stories about tourists being turned away or detained while trying to enter the US have deterred many would-be travelers;¹⁷ 40% of the respondents surveyed for this research said they were now less likely than they were six months ago to visit the US on vacation. In March, the total number of overseas visitors to the US dropped by 11.6% compared to 2024; many analysts expect that figure to continue falling, and several airlines have already scaled back flights to American destinations.¹⁸

Q: HOW HAS YOUR WILLINGNESS TO BUY AMERICAN PRODUCTS AND CONSUME AMERICAN MEDIA CHANGED OVER THE PAST SIX MONTHS?



Experiences



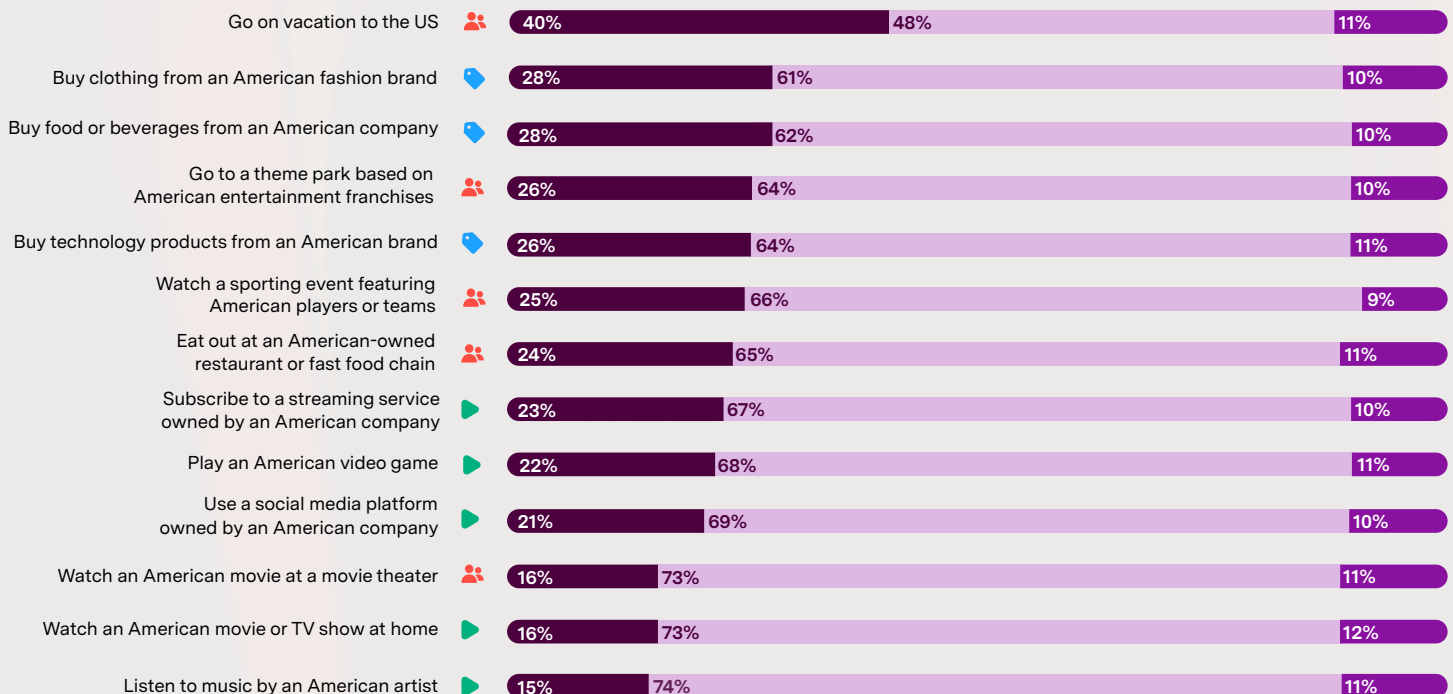
Home media



Consumer products

ALL MARKETS

● Less likely to do this ● No change ● More likely to do this



16. Anne Cassidy, "The Canadians and Danes boycotting American products," BBC News, April 9th, 2025

17. Nick Miroff, "Airport Detentions Have Travelers 'Freaked Out,'" The Atlantic, May 5th, 2025

18. Adam Gabbatt, "US to miss out on billions as Trump's policies deter overseas tourists," The Guardian, April 26th, 2025

In fact, Hollywood may be one of America's last bastions of soft power in the Trump 2.0 era

It's important to recognize that today's global wave of anti-Americanism is, fundamentally, a backlash against America the geopolitical entity and America the economic actor—not a wholesale rejection of American culture.

In fact, of the American industries and institutions evaluated as part of this research, the entertainment industry recorded the highest levels of positivity among global consumers—followed by American universities and the American tech sector.

Conversely, America's politicians appear to be playing the biggest role in driving

overall perceptions of the country downward. Consumers also tended to be fairly skeptical toward US banks, US energy companies, and America's healthcare and pharmaceutical industry.

Hollywood has long been a central component of America's global cultural influence. Travel almost anywhere in the world, and you can find diehard fans of American movie franchises and American TV shows.

And that's unlikely to change anytime soon. Across the globe, "Hollywood" continues to serve as a byword for great storytelling and high production

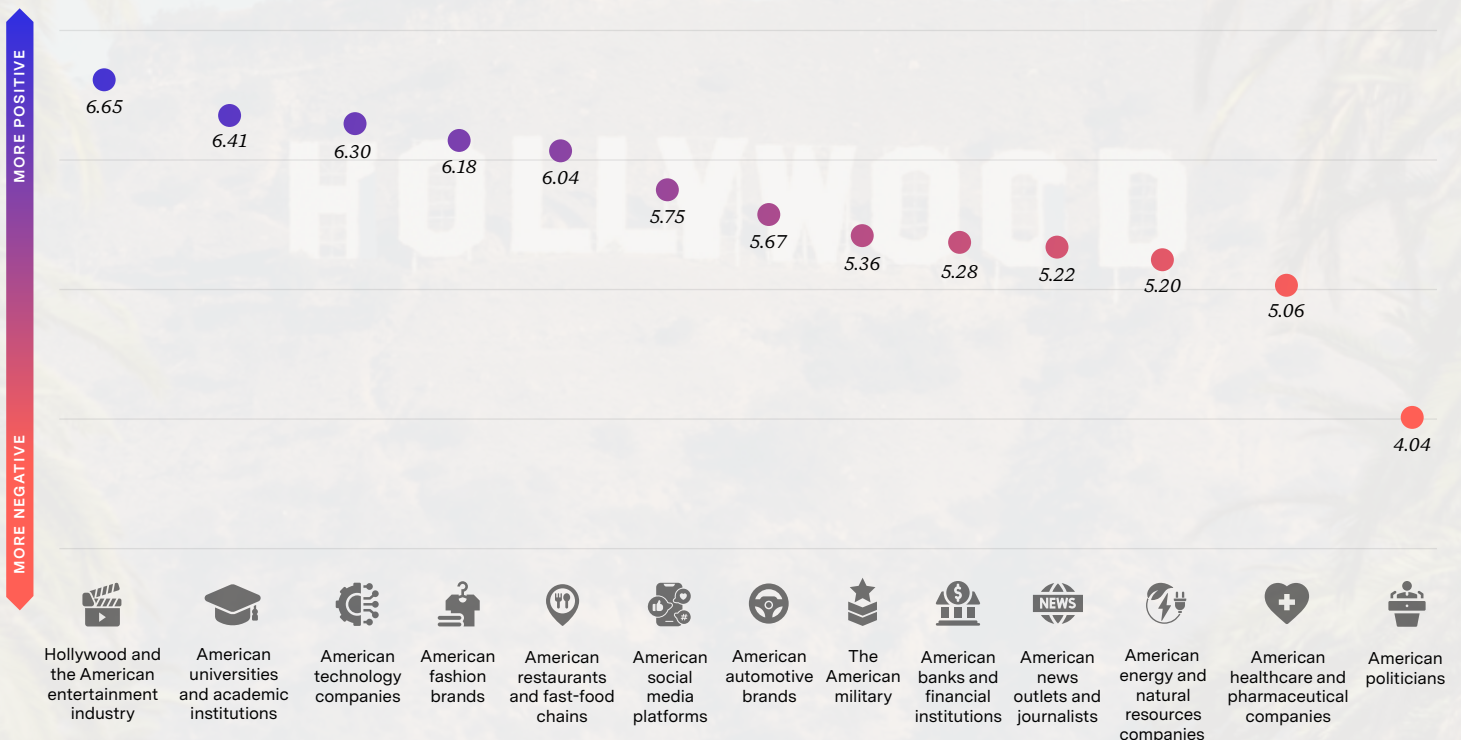
values; with the sole exception of China, **a plurality of consumers in all of the markets surveyed for this research saw American movies and TV shows as, on the whole, more entertaining than those from other markets.**

If anything, declining global sentiment toward other American institutions may make Hollywood's role as a cultural beacon for the country all the more important—provided that industry leaders are willing to consider how the content they're exporting aligns with global preconceptions about Brand America writ large.



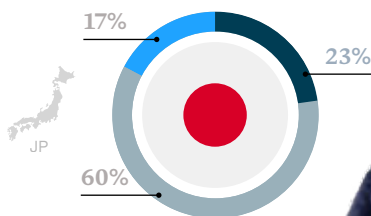
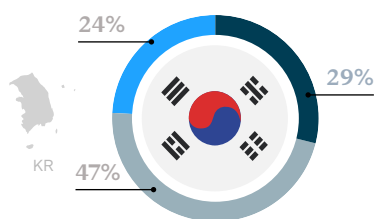
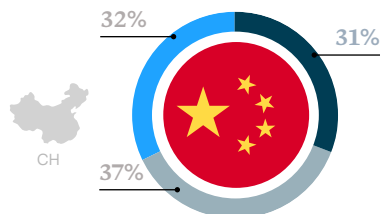
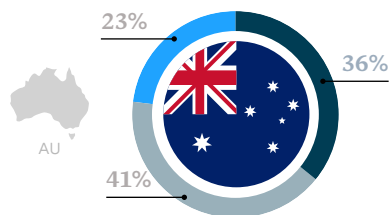
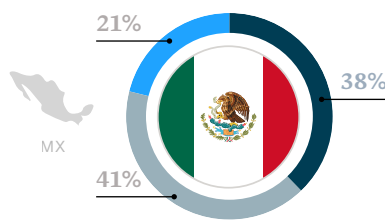
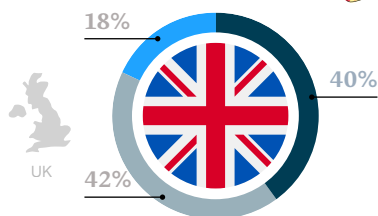
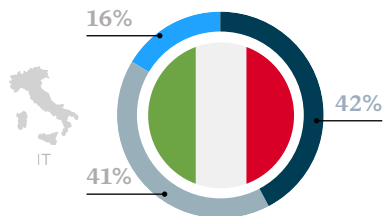
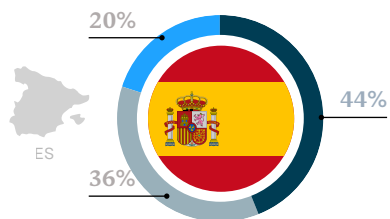
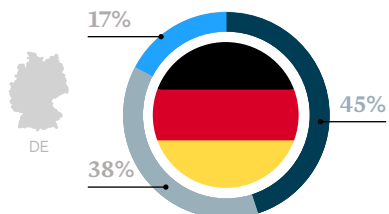
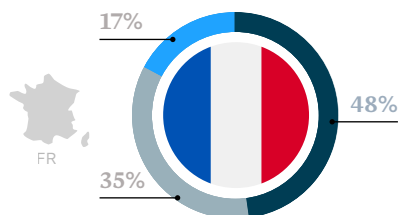
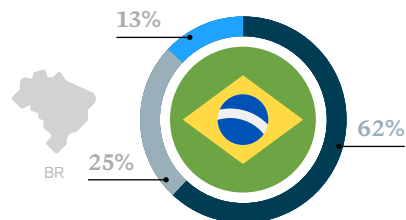
Q: ON A SCALE FROM 1 TO 10, HOW POSITIVE DO YOU FEEL TOWARD EACH OF THESE AMERICAN INSTITUTIONS?

ALL MARKETS



Q: HOW DO YOU FEEL AMERICAN MOVIES AND TV SHOWS COMPARE TO MOVIES AND TV SHOWS FROM OTHER COUNTRIES?

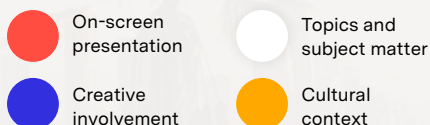
- American content is **more entertaining**
- Neutral / unsure
- American content is **less entertaining**



Despite the lack of organized boycotts, American studios will need to think carefully about how to position new releases in international markets

Q: WHAT MAKES A MOVIE OR TV SHOW FEEL AMERICAN TO YOU?¹⁹

ALL MARKETS



38%

It's mostly set in the US



34%

It portrays everyday aspects of American life

32%

It was mostly filmed in the US

30%

It features imagery and iconography associated with America

30%

It features references to American holidays or traditions

29%

It explores themes commonly associated with America

33%

Most of the actors are American



26%

It features references to American pop culture, music, or sports

25%

It's made by an American studio or streaming company

24%

It features references to American history

Compared to other sectors, America's entertainment industry is unlikely to bear the brunt of global anti-American sentiment. That doesn't mean, however, that American studios and streaming platforms can afford to become complacent and tune out the background noise of global geopolitics.

While global audiences are unlikely to avoid watching new American releases simply because of their country of origin, the American-ness of these movies and shows isn't exactly going to be a selling point.

And that means that **marketers will want to think carefully about how best to position new releases in international markets**—particularly in the case of content targeted toward older consumers, women, and other demographics where anti-American sentiment is particularly high.

For these types of movies and shows, studios and streaming platforms may want to downplay elements that make the story feel like an essentially American one at its core. Of course, this raises an important question: what is it, exactly, that causes audiences to identify a particular piece of content as, in essence, American?

The characters speak English with American accents	24%
It has a patriotic or nationalistic tone	24%
It includes American slang, idioms, or humor	24%
It features references to contemporary American political or social issues	22%
It features references to the American military	21%
It's directed by an American director	20%
It's based on an American novel, comic, or video game	18%
It's written by an American screenwriter	17%
It's popular primarily with American audiences	17%
It's available to watch on an American streaming platform	14%

19. Consumers were asked to select the five attributes that played the biggest role in making a movie or show feel American

For global audiences, it's the setting, themes, and iconography that determine the “American-ness” of content

For most consumers, this determination doesn't have much to do with behind-the-screen talent: the writer, director, and even the production company play, at best, a limited role in making content feel uniquely American. Nor does the context in which it's presented to them make much of a difference. Most people are unlikely to view a show that they discover on an American streaming platform like Netflix—as opposed to, say, a local TV channel—as inherently any more or less American.

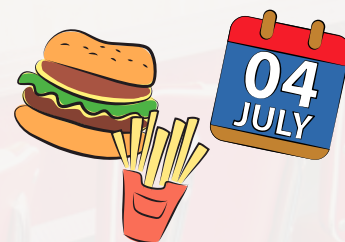
Instead, it's the on-screen assets that tend to be the determining factor: whether, for example, the content

is clearly filmed or set in the US, and whether it's populated predominantly by American actors.

Similarly, respondents were more likely to identify a piece of content as American if it contained iconography like the American flag, if it featured prominent references to uniquely American holidays or traditions—such as Thanksgiving or the 4th of July—or if it dealt with the everyday cultural markers and mundanities of American life: suburbs, high school, burgers and fries, and so on.

These, therefore, are some of the elements that may need to be de-emphasized in

international marketing campaigns in our current cultural moment—especially for content targeted towards audiences that show particularly strong evidence of anti-American sentiment.



While nothing can be taken for granted in today's geopolitical climate, the entertainment industry is better positioned than most to weather global anti-American backlash

Despite rising global skepticism toward American institutions, the entertainment sector remains a rare point of cultural connection and admiration. While industries such as consumer products, tech, and tourism may feel the sting of global boycott campaigns, Hollywood content continues to resonate with international audiences.

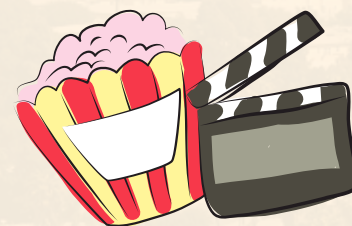
But resilience doesn't mean immunity. In today's political environment, nothing can be taken for granted. It's certainly possible that America's entertainment powerhouses will become further enmeshed into global economic conflicts and cultural clashes—especially now that Trump has declared his intention to make Hollywood the next frontier of his trade war.

Indeed, that escalation could soon put American studios in something of a Catch-22. New tariffs on overseas production, if implemented, will heavily incentivize them to set new releases in the US and film them on American soil. But that, in turn, will make content feel more obviously American, potentially alienating global audiences who feel increasingly uneasy about providing financial support to US businesses.

To get ahead of these challenges, studios and streaming platforms will need to approach international marketing with greater nuance—especially when targeting demographics that show elevated levels of anti-American sentiment. Subtly recontextualizing

content, avoiding overt displays of American exceptionalism, and amplifying universal themes over national identity can help preserve the industry's soft power while navigating a fractured geopolitical landscape.

In an era where “Brand America” may no longer be an asset, the entertainment industry has the rare ability to push against global currents and transcend borders—if it reads the room wisely.



In the Trump 2.0 era, uncertainty is often the only thing that can be taken for granted. With every new policy announcement rewriting the political narrative, entertainment brands cannot afford to be complacent when it comes to monitoring global trends and staying ahead of the curve.

Here are a few of the **key questions** American businesses in this sector should ask themselves to stay ahead of the curve and maximize the impact of their content in global markets:



How will damaged perceptions of “Brand America” impact global consumer appetite for specific content genres or types of American IP?



How can marketing assets and tactics help to reduce friction among increasingly US-skeptical global audiences, without diluting new releases' core appeal?



If international travel to the US fails to rebound, what's the long-term future of physical entertainment experiences—such as theme parks—that rely heavily on global footfall?



Are there tangible reputational risks for talent, franchises, or entertainment platforms that are seen as uniquely “American” relative to the rest of the market?



Will localization become more important as a tool for reframing the presentation of American institutions in content targeted at global audiences?

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How AI products and services are upending the lives of America’s creative professionals

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