

BRAND AMERICA

2026

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BACKGROUND AND IMPLEMENTATION

BACKGROUND

The survey was conducted by Novus on behalf of the American Chamber of Commerce. The purpose of this study is to gain a better understanding of the Swedish public's attitudes towards the United States, what Swedes associate with the American brand and measure if, and how, it changes over time.

RESULTS

The results are delivered in a chart report. Marked significant differences in the report (gender, age, and region etc.) are in comparison with the total. A significant difference means that a value in a subgroup, e.g. gender, deviates from the total value to such an extent that it cannot be seen as random. The result is post-stratified, i.e. subsequently weighted against known population figures in order to correct any distortions in the sample compared with the target population

IMPLEMENTATION

Number of conducted interviews: 1 047

Field period: May 21st – 27th, 2026

The survey was conducted via web interviews in Novus' randomly recruited Sweden panel, which guarantees representative results. This means that the results are generalizable to the target population.

Significant differences between the surveys (2026 vs 2025) are marked with an arrow. Green for increase and red for decrease.



TARGET GROUP

The Swedish general public.



Age:
18-84
years

MARGIN OF ERROR

The margin of error is a measure of the uncertainty in an estimate of a parameter. The size of the margin of error depends on the proportion that responds and the number of interviews that have been conducted. Below are examples of error margins for different outcomes in the survey:

For 1 000 interviews:
At turn-out 20/80: +/- 2,5%
At turn-out 50/50: +/- 3,1%



RESULTS



SHORT SUMMARY

- The top-of-mind brands in the mentioned industries are: Computers and digital platforms (Apple); E-commerce (Amazon); Life science (Astra Zeneca); Car manufacturers (Volvo); Entertainment (Netflix).
- Almost two out of ten (19%) have high confidence in U.S. based companies.
- Significant increase (now 41% vs 36% in 2025) in those who think that the U.S. is an innovative country.
- The most mentioned brand when it comes to innovation is Apple.
- Significant increase (now 16% vs 10% in 2025) in those who believe that the NATO membership has weakened the links between the U.S. and Sweden.
- One in three (33%) believe that the Swedish membership in NATO will change Swedes' perception of the U.S. negatively – a significant increase.
- One in three (35%) would like to see strengthened trade collaboration between Sweden and the U.S. – a significant increase.
- Those who are positive towards the U.S. has increased significantly compared to last year, from 17 percent to 21 percent.
- One in three (34%) has low confidence that American companies keep their promises.
- Almost four out of ten (38%) have actively opted out of American products solely because they come from the U.S.
- *Among those who have actively opted out of any American products in the last six months:* A majority (74%) has actively opted out of food solely because they come from the U.S.
- Half (51%) of the Swedish population have been to the U.S.
- Three out of ten (30%) would like to go to the U.S. in the coming five years – a significant increase.
- When asked to describe the U.S. common descriptions are a large country, President Trump, freedom and corruption.

Top of mind – brands in different industries

QUESTION: Name the first 1-3 brands that comes to mind in the following industries:

COMPUTERS AND DIGITAL PLATFORMS



“Apple” (453)
 “HP” (296)
 “Dell” (202)
 “Microsoft” (196)
 “Samsung” (166)
 “Lenovo” (134)
 “Google” (123)

E-COMMERCE



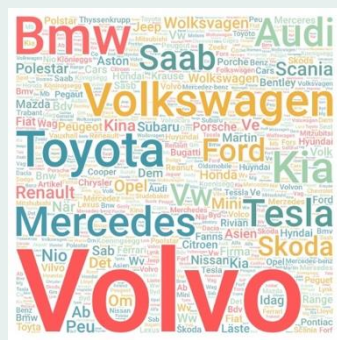
“Amazon” (315)
 “Zalando” (151)
 “Apotea” (116)
 “Temu” (106)
 “Boozt” (62)
 “H&M” (59)
 “Eligiganten” (46)

LIFE SCIENCE



“Astra Zeneca” (330)
 “Pfizer” (170)
 “Novo Nordisk” (120)
 “Apotea” (40)
 “Apoteket” (35)

CAR MANUFACTURERS



“Volvo” (861)
 “Volkswagen/VW” (306)
 “BMW” (218)
 “Toyota” (192)
 “Kia” (150)
 “Mercedes” (148)
 “Audi” (122)
 “Tesla” (121)

ENTERTAINMENT



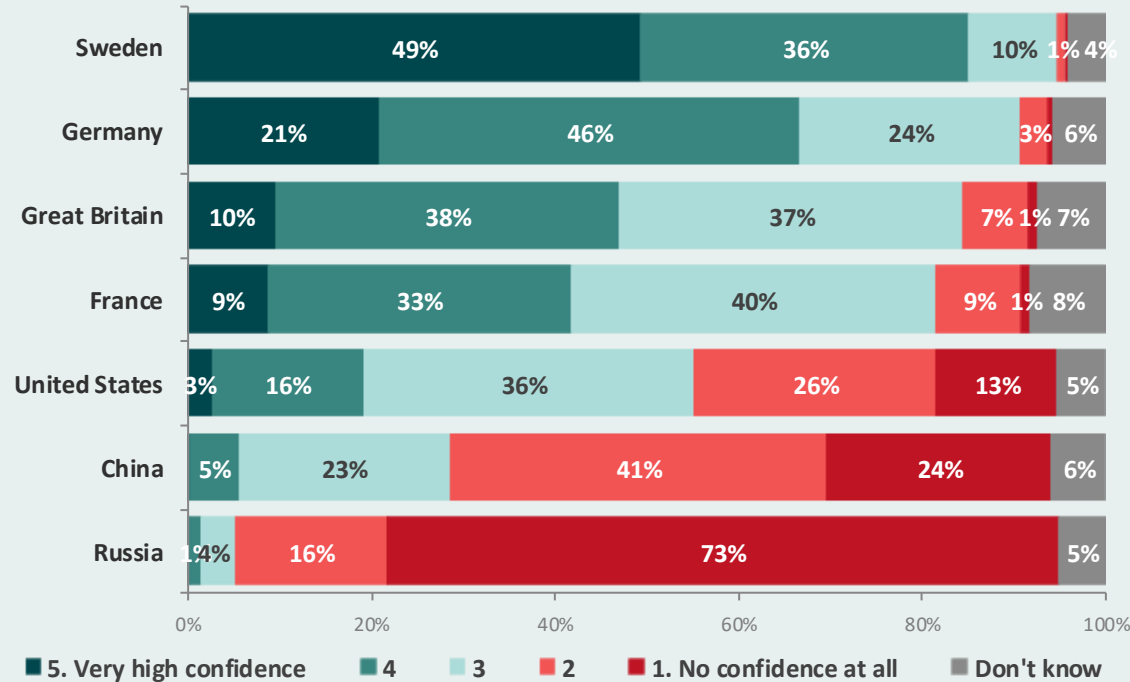
“Netflix” (267)
 “SVT” (120)
 “HBO” (93)
 “Spotify” (79)
 “TV4” (73)
 “Disney” (54)
 “SF” (46)
 “Youtube” (43)

BASE: Answered: (Computers and digital platforms n=860), (E-commerce n=812), (Life science n=582), (Cars n=968), (Entertainment n=652)

Almost two out of ten have high confidence in U.S. based companies

Arrows indicate a significant difference (increase or decrease), compared to previous year

QUESTION: Think about companies in general and state your opinion on how much confidence you have in companies with head office in the following countries:



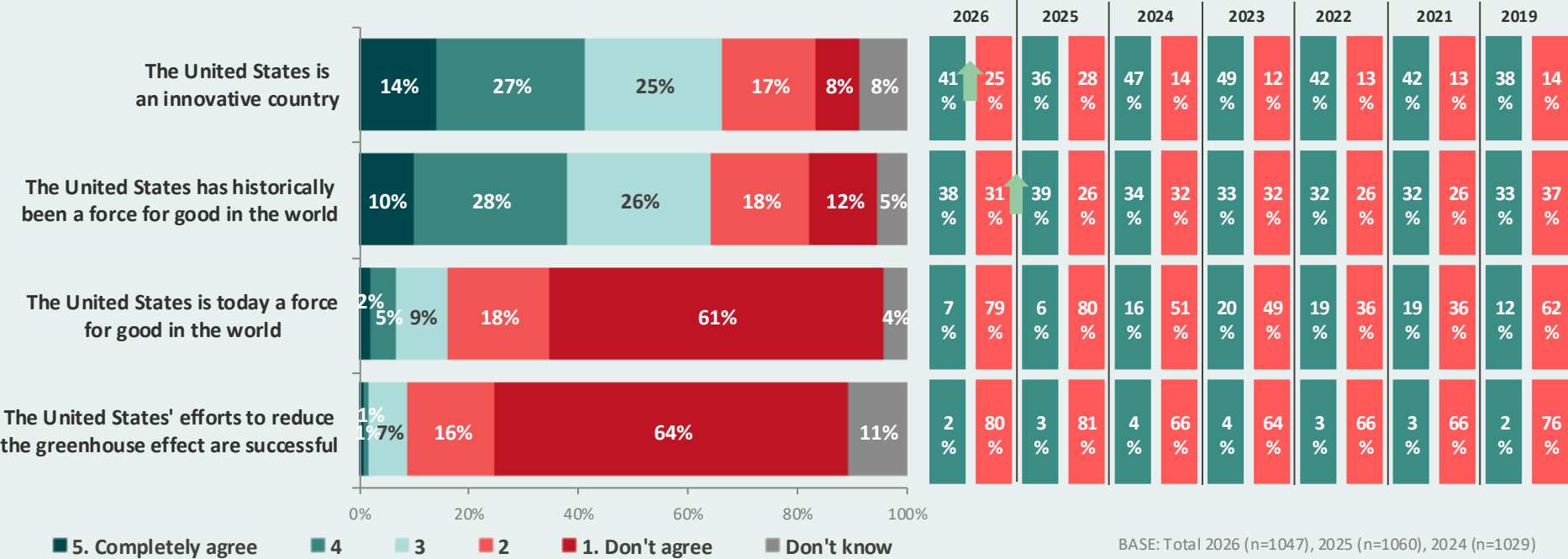
		High confidence (5+4)		Low confidence (1+2)			
		2026		2025		2024	
		2023					
Country	Sweden	85%	1%	84%	1%	79%	1%
	Germany	67%	4%	67%	4%	57%	5%
	Great Britain	47%	8%	49%	8%	45%	8%
	France	42%	10%	45%	10%	31%	15%
	United States	19%	40%	19%	37%	33%	20%
	China	6%	66%	3%	69%	4%	74%
	Russia	1%	90%	2%	89%	2%	87%

BASE: Total 2026 (n=1047), 2025 (n=1060), 2024 (n=1029)

Significant increase in those who think that the U.S. is an innovative country

Arrows indicate a significant difference (increase or decrease), compared to previous year

QUESTION: State your opinion on the following statements:

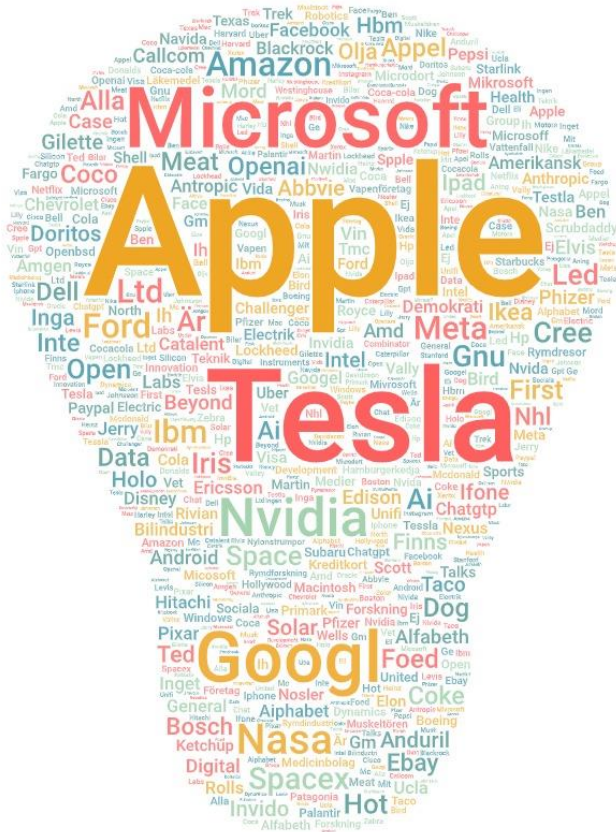


The most mentioned brand when it comes to innovation is Apple

QUESTION: Name the American brands that you most associate with innovation:

Open answer.

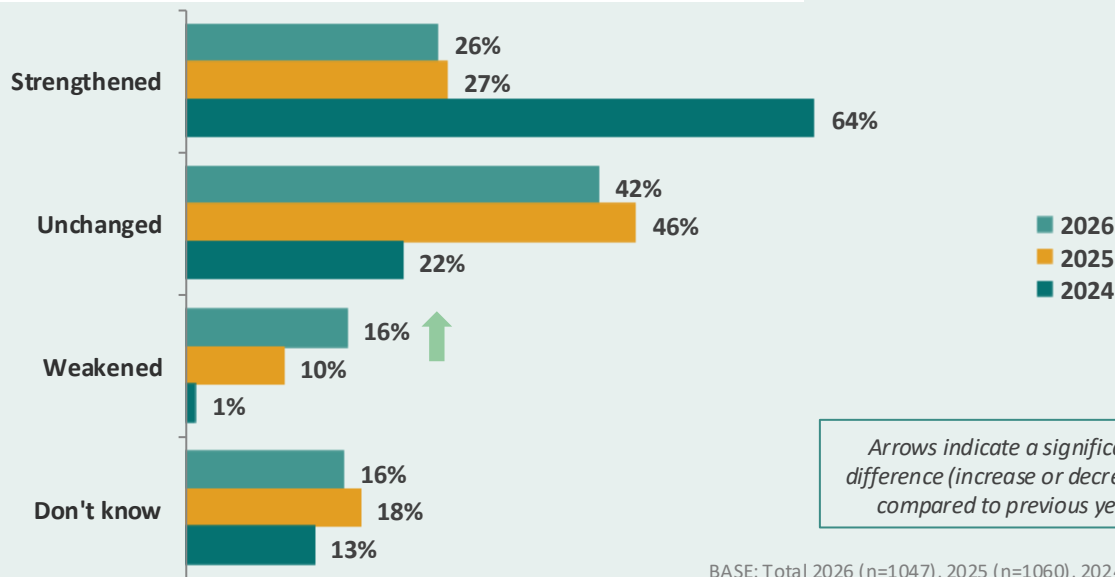
The most frequently mentioned brands associated with innovation are Apple (n=383), Tesla (n=198) and Microsoft (n=178). 39 percent says "Don't know".



BASE: Answered the question (n=640)

Significant increase in those who believe that the NATO membership has weakened the links between the U.S. and Sweden

QUESTION: Do you think that Sweden's NATO membership has* strengthened or weakened the links between the U.S. and Sweden? 2024 and 2025: *will strengthen or weaken



Arrows indicate a significant difference (increase or decrease), compared to previous year

BASE: Total 2026 (n=1047), 2025 (n=1060), 2024 (n=1029)

Significant differences

The following subgroups respond to a greater extent as follows:

Strengthened (26%)

- Gender: Male (36%)
- Gender & Age: Male 35-49 years (33%)
- Household income: -299k (35%)

Unchanged (42%)

- Age: 50-64 years (48%)
- Gender & Age: Male 50-64 years (55%)
- Occupation: Blue collar (52%)
- Has children residing at home (48%)
- Sector: Private (51%)
- Household income: 300k-499k (52%)
- Live in smaller towns/cities and rural municipalities (47%)

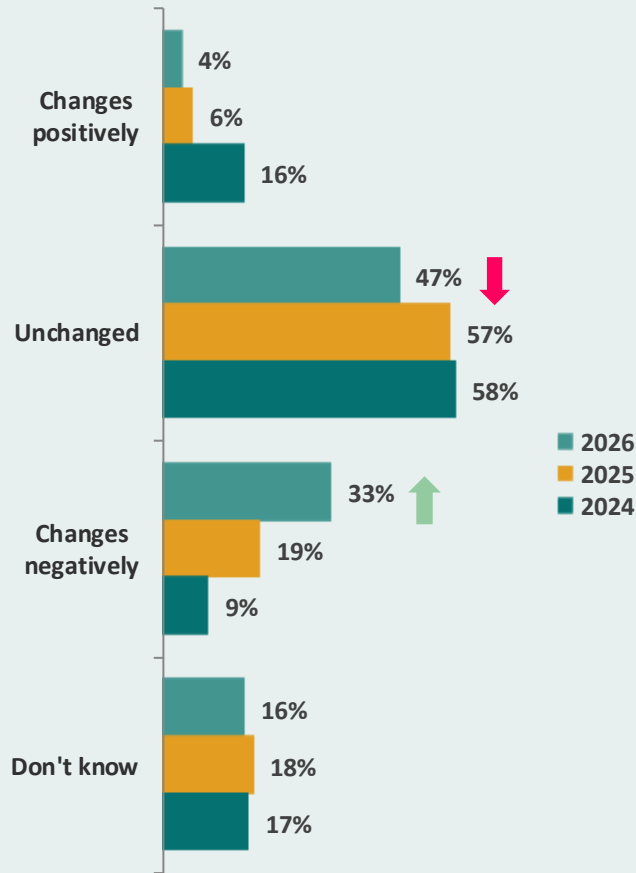
Weakened (16%)

- Age: 65-84 years (23%)
- Gender & Age: Female 50-64 years (23%), Female 65-84 years (24%)
- Occupation: Retired (22%)
- Sector: Public (22%)
- Live in Eastern Sweden (23%)

One in three believe that Sweden's membership in NATO will change Swedes' perception of the U.S. negatively – a significant increase

QUESTION: Do you think that Swedes' perception of the U.S. will change or not change with Sweden's membership in NATO?

Arrows indicate a significant difference (increase or decrease), compared to previous year



BASE: Total 2026 (n=1047), 2025 (n=1060), 2024 (n=1029)

Significant differences

The following subgroups respond to a greater extent as follows:

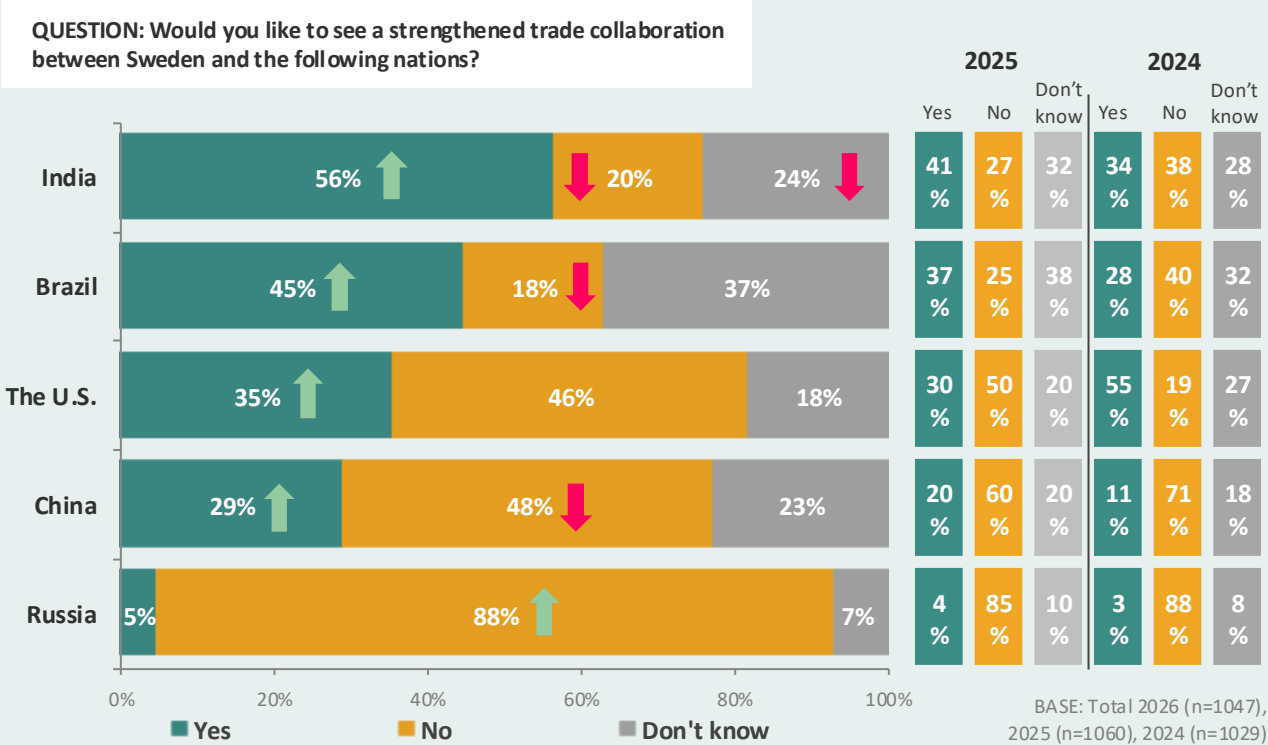
Unchanged (47%)

- Gender: Male (52%)
- Age: 35-49 years (52%)
- Gender & Age: Male 35-49 years (55%), 50-64 years (57%)
- Occupation: White collar (53%)
- Has children residing at home (54%)
- Sector: Private (52%)

Changes negatively (33%)

- Age: 65-84 years (46%)
- Gender & Age: Female 65-84 years (50%)
- Occupation: Retired (46%)
- Household income: 500k-799k (39%)

One in three would like to see strengthened trade collaboration between Sweden and the U.S.



Significant differences

The following subgroups respond to a greater extent as follows:

The U.S. - Yes (35%)

- Gender: Male (50%)
- Gender & age: Male 35-49 years (64%), Male 50-64 years (47%), Male 65-84 years (45%)
- Sector: Private (46%)
- Household income: 500k-799k (44%), - 800k (41%)

The U.S. - No (46%)

- Gender: Female (53%)
- Age: 18-34 years (56%)
- Household income: -299k (54%)

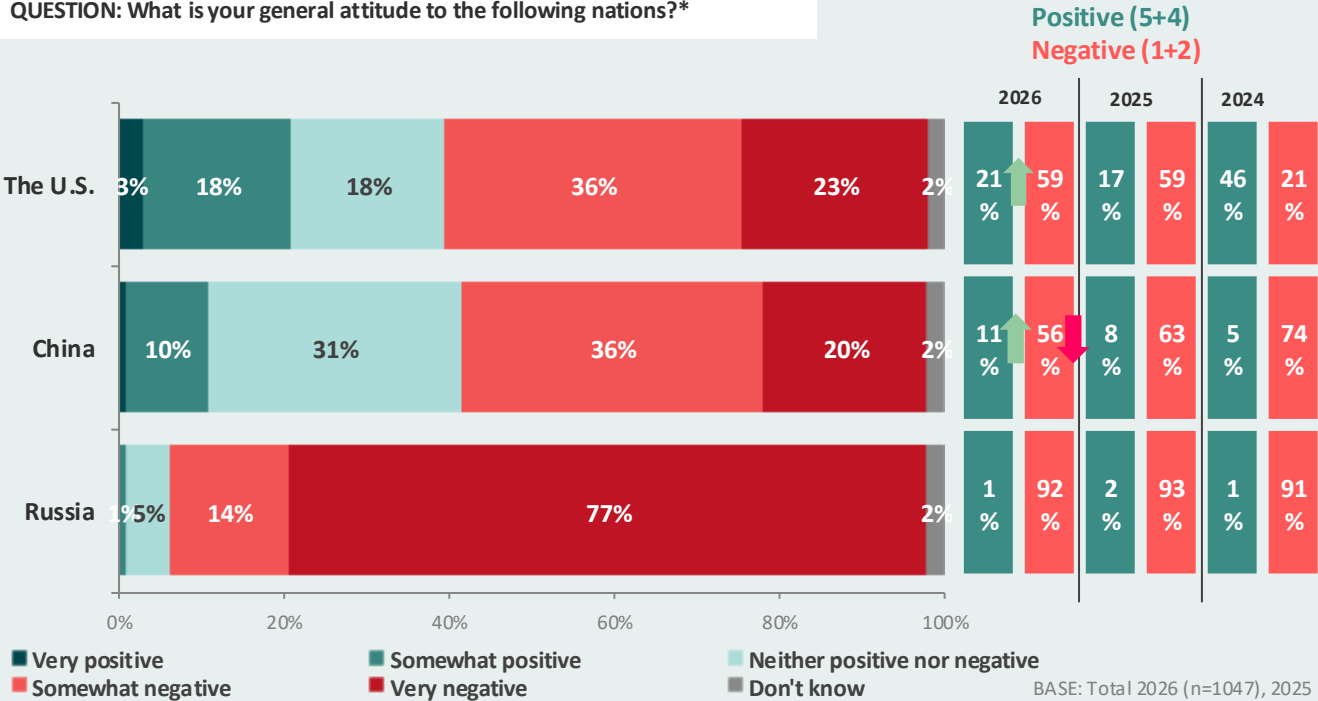
The U.S. - Don't know (18%)

- Gender: Female (26%)
- Gender & age: Female 35-49 years (35%)

Arrows indicate a significant difference (increase or decrease), compared to previous year

Those who are positive towards the U.S. has increased significantly compared to last year

QUESTION: What is your general attitude to the following nations?*



BASE: Total 2026 (n=1047), 2025 (n=1060), 2024 (n=1029)

Significant differences

The following subgroups respond to a greater extent as follows:

The U.S. - Positive (21%)

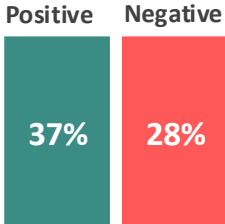
- Gender: Male (30%)
- Gender & Age: Male 35-49 years (37%), Male 50-64 years (30%)
- Sector: Private (27%)
- Household income: 800k- (26%)

The U.S. - Negative (59%)

- Gender: Female (70%)
- Age: 18-34 years (67%)
- Gender & age: Female 35-49 years (78%)
- Household income: -299k (67%)

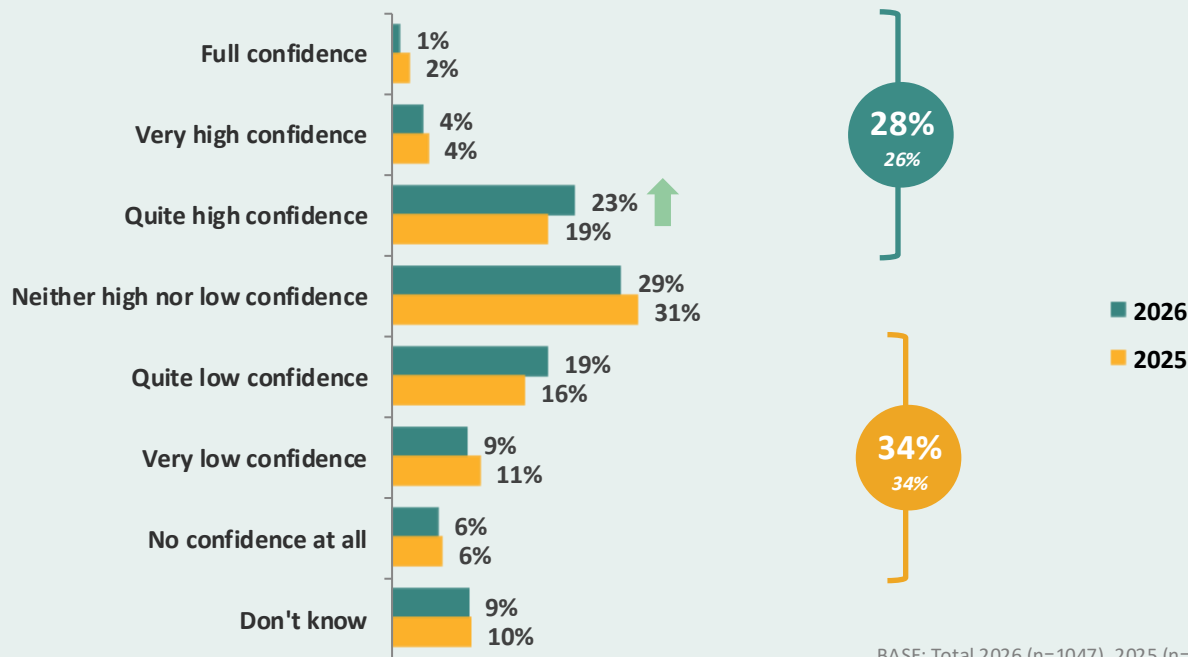
* 2023:

Previous version
QUESTION: Would you in general have a positive or negative attitude to the United States?



One in three has low confidence that American companies keep their promises

QUESTION: How much confidence do you have in American companies keeping their promises?



BASE: Total 2026 (n=1047), 2025 (n=1060)

Significant differences

The following subgroups respond to a greater extent as follows:

Full + Very high + quite high (28%)

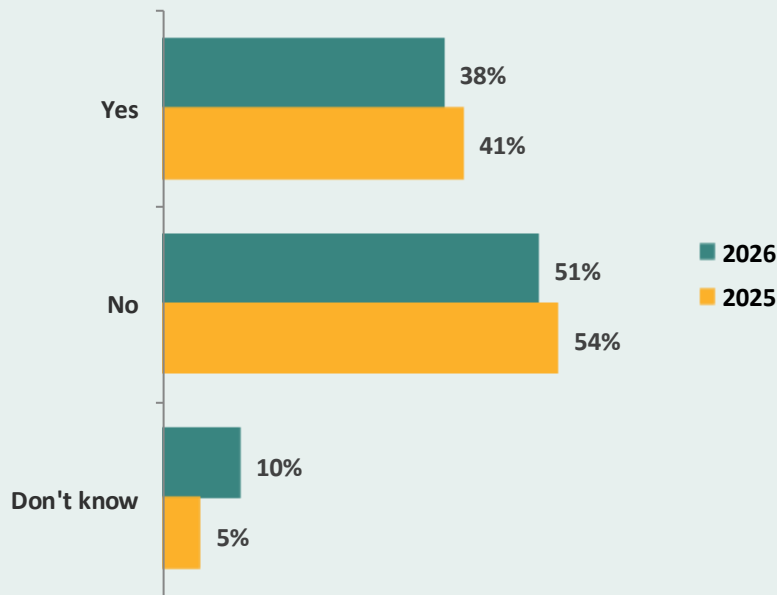
- Gender: Male (37%)
- Gender & Age: Male 50-64 years (37%)
- Household income: 800k- (34%)

No confidence at all + very low + quite low (34%)

- Age: 18-34 years (47%)
- Region: Northern Sweden (44%)

Almost four out of ten have actively opted out of American products solely because they come from the U.S.

QUESTION: In the last 6 months, have you actively opted out of any American products that you previously used solely because they come from the U.S.?



BASE: Total 2026 (n=1047), 2025 (n=1060)

Significant differences

The following subgroups respond to a greater extent as follows:

Yes (38%)

- Age: 65-84 years (47%)
- Gender & Age: Male 65-84 years (48%), Female 65-84 years (47%)
- Occupation: Retired (48%)

No (51%)

- Gender: Male (57%)
- Age: 35-49 years (58%)
- Gender & age: Male 35-49 years (71%)
- Occupation: Blue collar (64%)
- Has children residing at home (57%)
- Sector: Private (60%)
- Live in smaller towns/cities and rural municipalities (56%)

A majority has actively opted out of food solely because it comes from the U.S.

QUESTION: What type of product was it?
Multiple answers possible.

Significant differences. The following subgroups respond to a greater extent as follows:

- Food (74%)** (36%)

 - Highest level of education: University (80%)
 - Occupation: White collar (82%)
 - Sector: Private (84%)
 - Household income: 800k- (81%)
- Social media (17%)**

 - Gender: Male (24%)
 - Large cities and municipalities close to large cities (23%)
- Clothes (32%)**

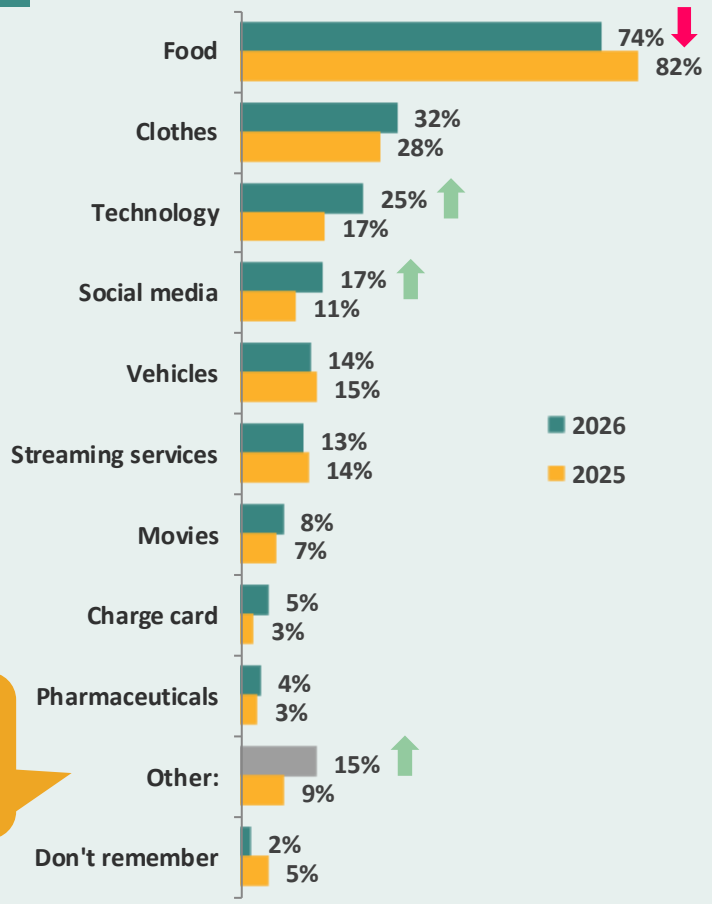
 - Gender: Female (38%)
- Vehicles (14%)**

 - Household income: 800k- (24%)
- Technology (25%)**

 - Has children residing at home

Example of other:

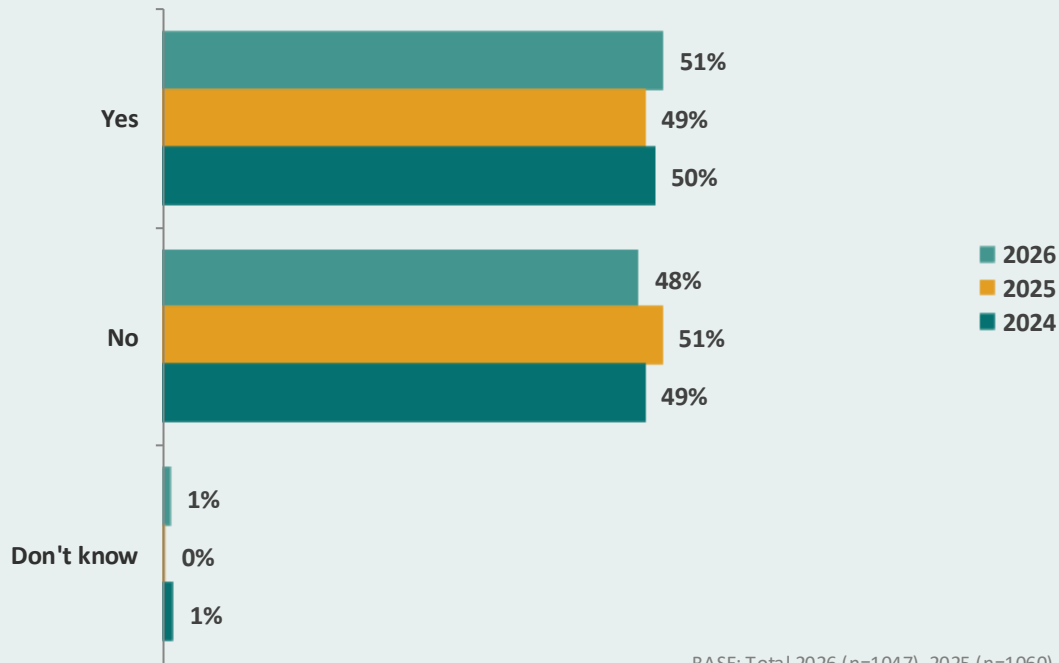
- Wine
- Alcohol
- Cosmetics



BASE: Among those who have actively opted out of any American products in the last six months (2026 (n=401), 2025 (n=435))

Half of the Swedish population have been to the U.S.

QUESTION: Have you been to the U.S.?



BASE: Total 2026 (n=1047), 2025 (n=1060), 2024 (n=1029)

Significant differences

The following subgroups respond to a greater extent as follows:

Yes (51%)

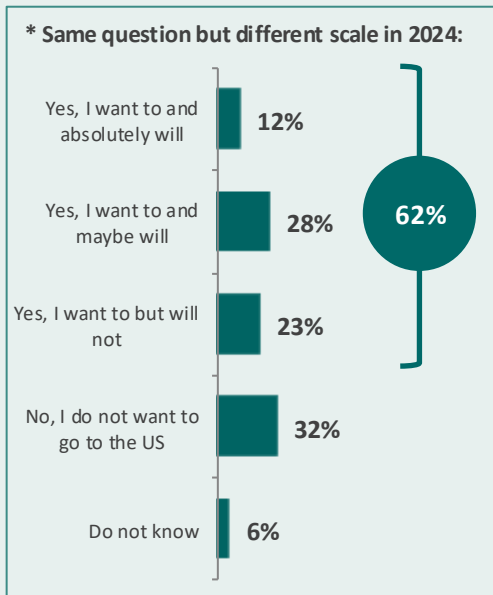
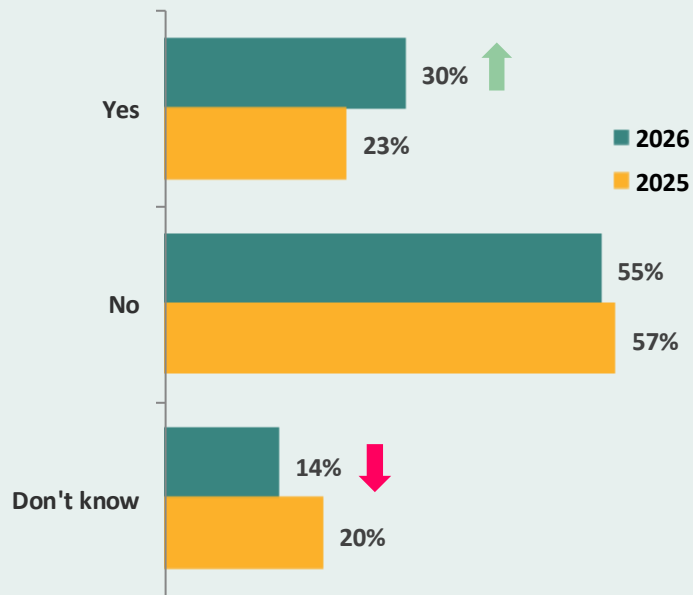
- Gender & Age: Male 50-64 years (60%), 65-84 years (59%)
- Highest level of education: University (64%)
- Occupation: White collar (61%), Retired (57%)
- Household income: 800k- (64%)
- Large cities and municipalities close to large cities (67%)
- Region: Stockholm (72%)

No (48%)

- Age: 18-34 years (55%)
- Highest level of education: Secondary school or lower (57%)
- Occupation: Blue collar (63%)
- Household income: -299k (65%), 300k-499k (55%)
- Live in larger cities and municipalities (56%)
- Live in smaller towns/cities and rural municipalities (59%)
- Region: Southern Sweden (62%)

Three out of ten would like to go to the U.S. in the coming five years

QUESTION: Would you like to go to the U.S. in the coming five years?
*



BASE: Total 2026 (n=1047), 2025 (n=1060)

Significant differences

The following subgroups respond to a greater extent as follows:

Yes (30%)

- Gender: Male (39%)
- Age: 35-49 years (40%)
- Gender & Age: Male 35-49 years (56%)
- Occupation: Blue collar (43%), White collar (38%)
- Has children residing at home (39%)
- Sector: Private (41%)
- Household income: 800k- (40%)

No (55%)

- Gender: Female (63%)
- Age: 65-84 years (68%)
- Gender & age: Female 65-84 years (76%)
- Occupation: Retired (71%)
- Household income: -299k (64%), 300k-499k (64%)

Words to describe the U.S.

QUESTION: If you think of the United States, could you describe the United States in 3-5 words? *Open answer.*



Large country

President Trump

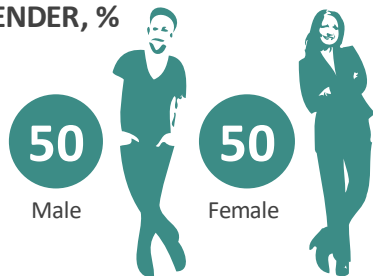
Freedom

Corrupt

BASE: Total (n=1047)

BACKGROUND

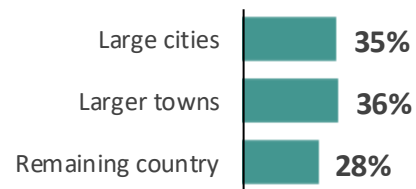
GENDER, %



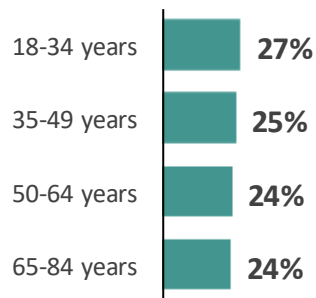
REGION



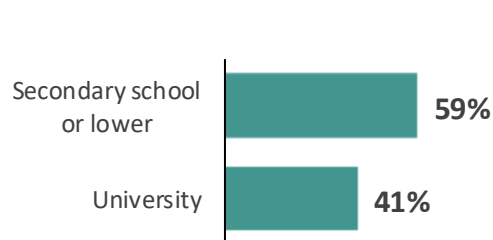
GEOGRAPHY SIZE



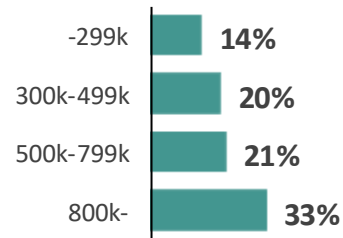
AGE



EDUCATION



HOUSEHOLD INCOME



BASE: Total (n=1047)

CONTACT NOVUS



WE LOVE QUESTIONS!



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THANK YOU!



novus

ABOUT NOVUS' SURVEYS



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DEFINITIONS

In Novus reports, we often report differences between different values, something we call statistically significant differences, statistical significance or that something is "not within the margin of error".

Degree of confidence

Novus standard is 95% confidence level, which means that the true value for the population with 95% probability is within the range given by the sample value +/- margin of error. Using a 95% confidence level corresponds to a significance level of 5%.

What is a margin of error?

The margin of error is a measure of the uncertainty in an estimate of a parameter. For example, the margin of error in a sample of 1000 individuals, at a 5% significance level, will be for the following outcomes:

20/80: +/- 2.5%

50/50: +/- 3.1%

Is it statistically certain?

If a difference is greater than the margin of error, the difference is statistically significant. A statistically significant difference between two different values means that there is a difference that probably cannot be explained solely by chance. What is certain is thus that there is a difference, not the size itself.

IN SHORT, NOVUS'

MUNICIPAL GROUP DIVISION

A. LARGE CITIES AND MUNICIPALITIES CLOSE TO LARGE CITIES

A1. Large cities - municipalities with at least 200,000 inhabitants in the largest urban area.

A2. Commuting municipality near a metropolitan area - municipalities with at least 40% commuting to work in a metropolitan or metropolitan municipality.

B. LARGER CITIES AND MUNICIPALITIES NEAR LARGER CITIES

B3. Larger city - municipalities with at least 50,000 inhabitants, of which at least 40,000 inhabitants in the largest urban area.

B4. Commuting municipality near a larger city - municipalities with at least 40% commuting to work in a larger city.

B5. Low commuting municipality near a larger city - municipalities with less than 40% commuting to work in a larger city.

C. SMALL TOWNS/URBAN AREAS AND RURAL MUNICIPALITIES

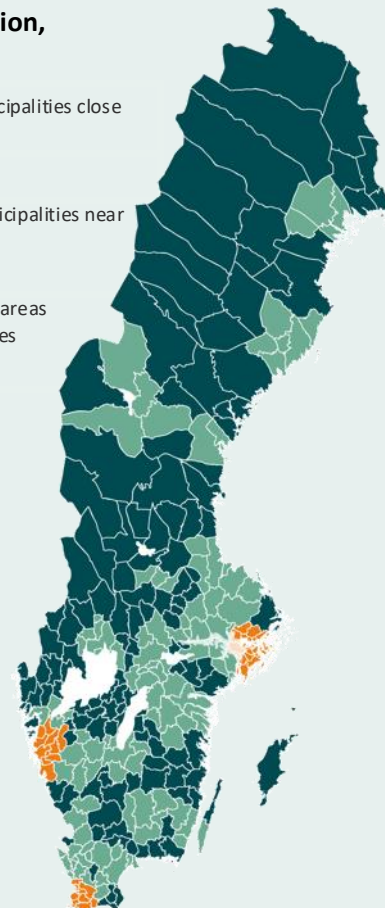
C6. Smaller town/urban area - municipalities with at least 15,000 but less than 40,000 inhabitants in the largest urban area.

C7. Commuting municipality near a smaller town/urban area - municipalities with at least 30% outbound or inbound commuting to a smaller town.

C8. Rural municipality - municipalities with less than 15,000 inhabitants in the largest urban area, low commuting pattern (less than 30%).

C9. Rural municipality with hospitality industry - rural municipality with at least two criteria for hospitality industry, i.e. number of guest nights, turnover in retail / hotel / restaurant in relation to the number of inhabitants.

Municipal group division, main groups

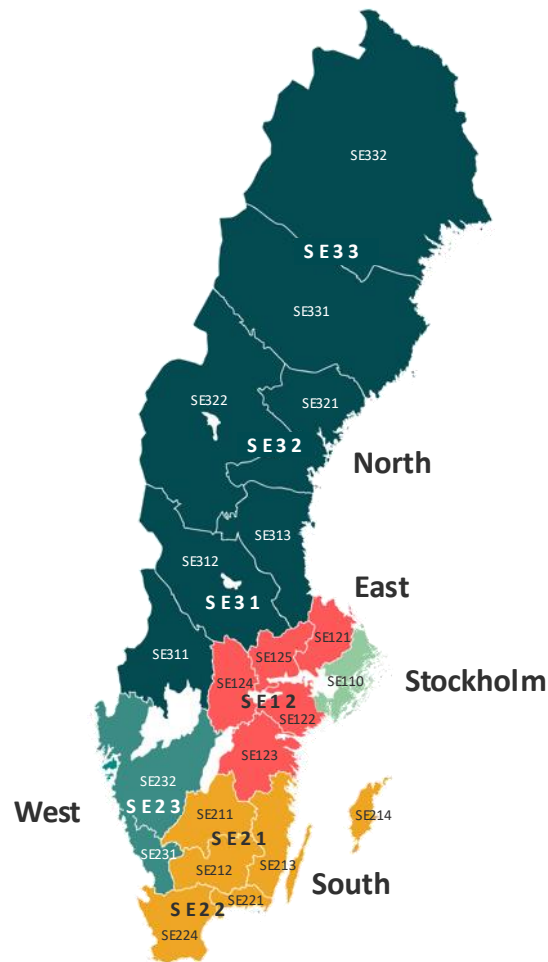


The report reports significant differences for three main groups of municipalities; large cities and municipalities close to cities, larger cities and municipalities near larger cities as well as smaller cities/urban areas and rural municipalities. Novus uses SKR's municipal group division from 2023

NOVUS' SWEDEN PANEL: STANDARD FOR REGIONS

From January 1, 2023

5 regions	Share in %
Stockholm SE11 Stockholm	23,2%
East SE12 Östra Mellansverige	16,7%
South SE22 Sydsverige SE21 Småland med öarna	23,2%
West SE23 Västsverige	20,0%
North SE32 Mellersta Norrland SE33 Övre Norrland SE31 Norra Mellansverige	16,9%



SHORT ABOUT NOVUS' SWEDEN PANEL

Novus Sweden panel consists of approx. 60,000 panelists. The panel is randomly recruited (you can not register yourself to make money or because you want to influence public opinion) and is nationally representative regarding age, gender and region in the age range 18-84 years. Any distortions in the panel structure are remedied by subtracting a nationally representative sample from the panel and by weighting the result.

We take good care of our panel through so-called panel management. This means that we make sure that you can not participate in too many surveys during a short period of time , nor in several similar surveys. We also have a system for rewards for the panel.

Survey implementation

A sample from the panel is drawn. The panelists in the sample receive an invitation to the survey via e-mail. The invitation contains information about how long the survey takes to answer , the last response date and a link that you click on to get to the questionnaire. You can answer all questions at once or take a break and return to the questionnaire at a later time.

When the data collection is complete, the data processing begins. Then tables are produced and a report is compiled.

Feel free to ask for more information about our panel management!



ABOUT QUALITY IN WEB PANELS

Novus Sweden panel is of high quality. We continuously carry out quality checks and validations of both the panel and the answers given by the panel participants.

In comparative studies (with other web panels) we have found that the panel members in Novus' panel take longer to answer questions than panelists from other panels, and that there is a logic in the answers (example: if you like ice cream and chocolate, then you also like chocolate ice cream). In self-recruited panels, we do not see this logic to the same extent.

We also see that our panel members have a more "average Swedish behavior" than self-recruited panels, where you are, among other things, very internet active.

Novus panel members answer an average of 12 surveys per year, which is significantly fewer surveys than in many other panels, and provides a higher quality of implementation. Another very important quality aspect is to state the frequency of participants (response frequency), which is a requirement according to all industry organizations.

Some important checkpoints when conducting web surveys in web panels:

- The panel must be randomly recruited to be able to reflect reality.
- The survey company must always be able to report the frequency of participants for each individual survey.
- The panel members should not be professionals, i.e. get too many surveys. If you get more than two per month, there is a risk that you become a professional respondent and respond to the survey for the wrong reasons.
- The panel must be managed with a good panel management regarding rewards, validation of answers, etc.
- Field work (conducting interviews) must always be reported and preferably include both weekdays and public holidays.

