

B E L L W E T H E R R E S E A R C H

Presentation of Findings

From a national survey of 1,041
U.S. registered voters.

July 2026



Survey Profile

Bellwether Research conducted a national survey of registered voters between July 7–11, 2026 using a mixed-mode methodology (phone and text). Respondents were randomly selected from an updated list of registered voters. Weights were applied using standard raking across age, gender, education, race, Hispanic ethnicity, and census region.

The demographic targets are based on the 2024 CPS registered-voter population. Weighting also included 2024 presidential vote, and party ID (29% D – 28% R – 43% Ind); When independents who lean toward a party are included in party totals, party ID was: (47% D – 44% R – 9% Ind).

National Survey Results - Families USA

1,041 U.S. registered voters, nationwide · Fielded July 7–11, 2026 · Margin of error ±3%

Respondent Profile

All respondents are registered voters (Q1: 100%).

Q2 · REGION		Q3 · GENDER		Q6 · HISPANIC/LATINO	
South	37%	Woman	52%	No	89%
West	23%	Man	47%	Yes	11%
Midwest	22%	Other / prefer not to say	1%		
Northeast	18%				
Q4 · AGE		Q7 · RACE		Q8 · AREA	
18–24	9%	White	80%	Suburban	45%
25–34	16%	Black	12%	Rural / small town	34%
35–44	15%	Two or more races	4%	Urban	21%
45–54	16%	Asian	2%		
55–64	18%				
65+	25%				
Q5 · EDUCATION		Q9 · FINANCIAL SITUATION			
Less than HS diploma	5%	Doing okay	38%		
HS diploma / GED	25%	Living comfortably	35%		
Some college	20%	Just getting by	19%		
Associate degree	10%	Finding it difficult	9%		
Bachelor's degree	25%				
Graduate degree	15%				

Key findings



Key finding: Health care costs are a dominant concern

- The cost of health care ranks as the top issue priority for voters, with women especially concerned.
- Nearly half of all voters say it is difficult to afford the cost of healthcare.
- A majority says that ACA health insurance premiums have increased “a lot” and that it is “bad news” that ACA enrollment is down.
- Voters overwhelmingly say it is important for the President and Congress to act on health care costs.

47%

say the cost of health care is one of the most important issues for Congress and the President to address—ahead of the cost of housing, which ranks second (at 34%).

48%

say it is personally difficult to afford health care right now, including 18% who say “very difficult.”

87%

say it is important for the President and Congress to act on health care costs, including 74% who say it is “very important.”

Key finding: Voters are unaware of Medicaid cuts -60%oppose

- Just under four-in-ten know that Medicaid funding will decrease. One-in-four say it will stay the same or increase, while the rest are unsure.
- Rural voters are among the least informed about upcoming cuts to Medicaid.
- By a two-to-one margin voters oppose cuts to federal Medicaid funding.
- We identified groups most likely to oppose cuts to Medicaid (Democratic cohorts) and those most likely to favor cuts to Medicaid (Republican cohorts) and we track these two groups as proxies for base support and opposition throughout this analysis.

38%

are aware that Medicaid funding will decrease. 17% say it will increase and 7% say it will stay the same. 38% are unsure.

60%

oppose cuts to Medicaid – 51% “*strongly oppose*,” while 30% support cuts. A majority of Republicans support cuts while a majority of Independents oppose them; Democrats are overwhelmingly opposed.

37%

of GOP women and 38% of Republicans under 45 oppose Medicaid cuts. They are receptive to arguments about impacts on vulnerable people and to communities. GOP women are largely unaware that Medicaid funding will decrease.

Key finding: Hospital pricing is the strongest bipartisan opportunity in the survey

- With wide spread agreement that hospital prices are unreasonable, curbing excessive hospital pricing at large systems has broad bipartisan appeal.
- Voters react more negatively to “corporate health systems” than to “large hospital systems.”
- Voters don’t think consolidation will improve care or lower prices and would support Congress taking action to stop unchecked corporate consolidation.
- A “cut costs not care” message is powerful and a way to bridge potential divides about Medicaid funding by linking it to unchecked hospital pricing.

81%

say hospital fees and prices are unreasonable – one of the most one-sided results in the survey, with broad agreement across party lines.

58%

Expect that when an independent hospital joins a large system, prices will rise without care improving.

70%

are convinced that Congress must take action to stop unchecked corporate consolidation that is driving up prices.

Key finding: Reproductive health care messaging can persuade

- Two-thirds of voters are aligned with the idea that decisions about reproductive health care should be made by patients and their doctors – not politicians.
- Republican women are reachable on messages about reproductive health care, including how funding cuts hurt patients' health and safety. Republican men are resistant.
- Perceptions of Planned Parenthood are polarized by party, and, in this case, Republican women are as negative as Republican men while Democrats are widely positive.

53%

of GOP women say it *is* convincing that decisions about reproductive health care, including abortion, should be made by patients & their doctors –not politicians. 51% say it is convincing that reproductive care is basic health care and that cutting funding for these services puts patients' health and safety at risk.

47%

of GOP men—a plurality –say it is *not* convincing that reproductive health care decisions should be made by patients & their doctors.

20%

of GOP women have a favorable view of Planned Parenthood compared to 83% of Democratic women, and 50% of independent women.

Detailed findings

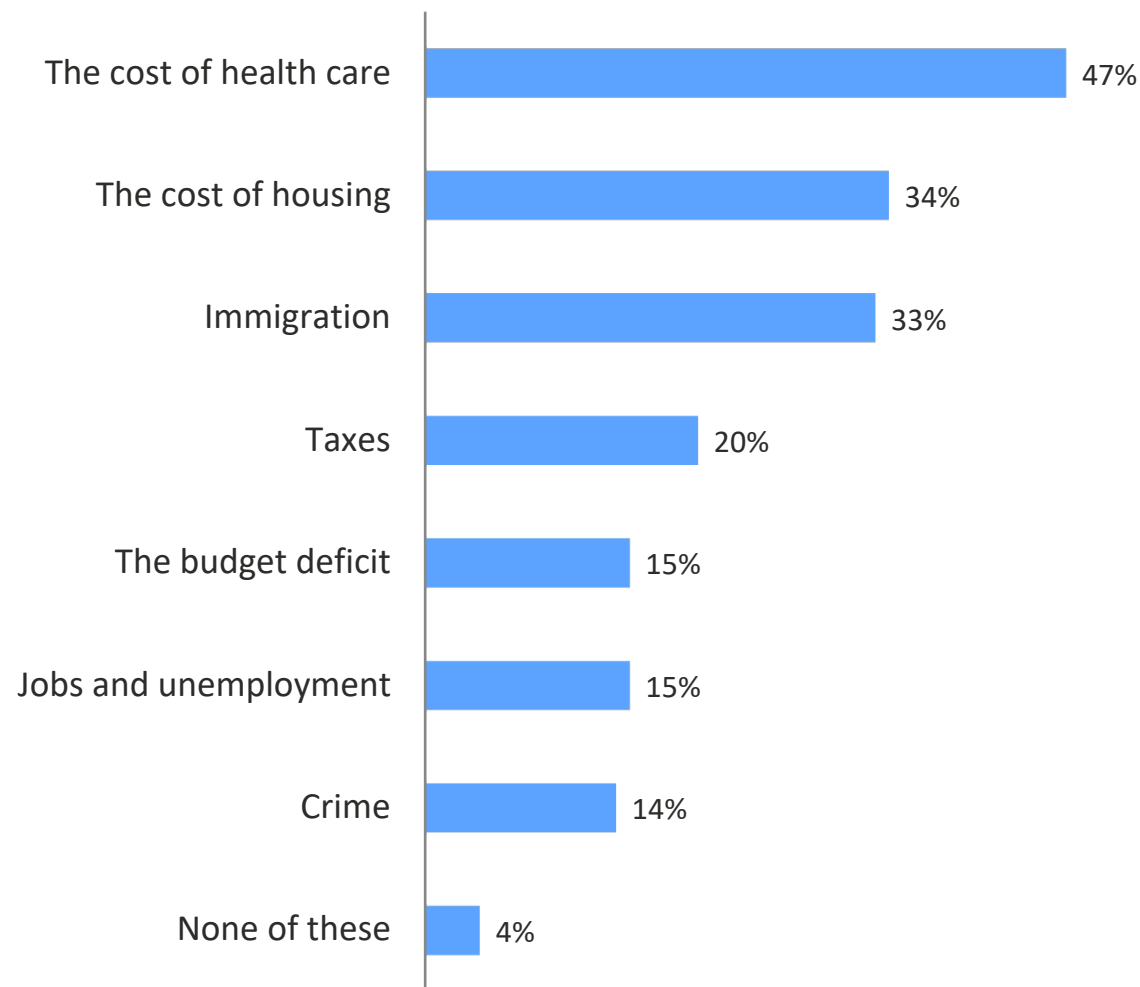


Most important issues for Congress & the President; importance of lowering health care costs

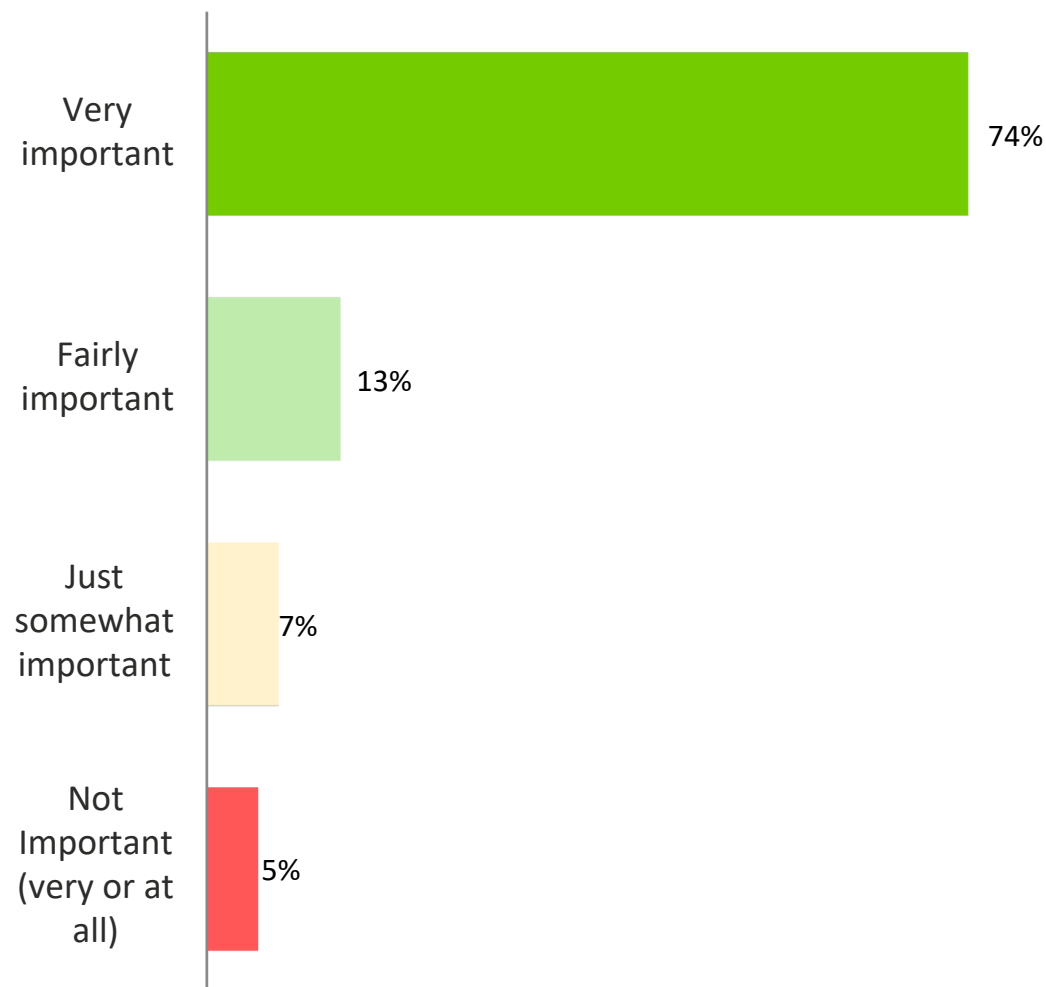
Q10: top two most important issues for Congress & the President.

Q11: importance for the President & Congress to take action to lower health care costs.

Q10: top two most important issues

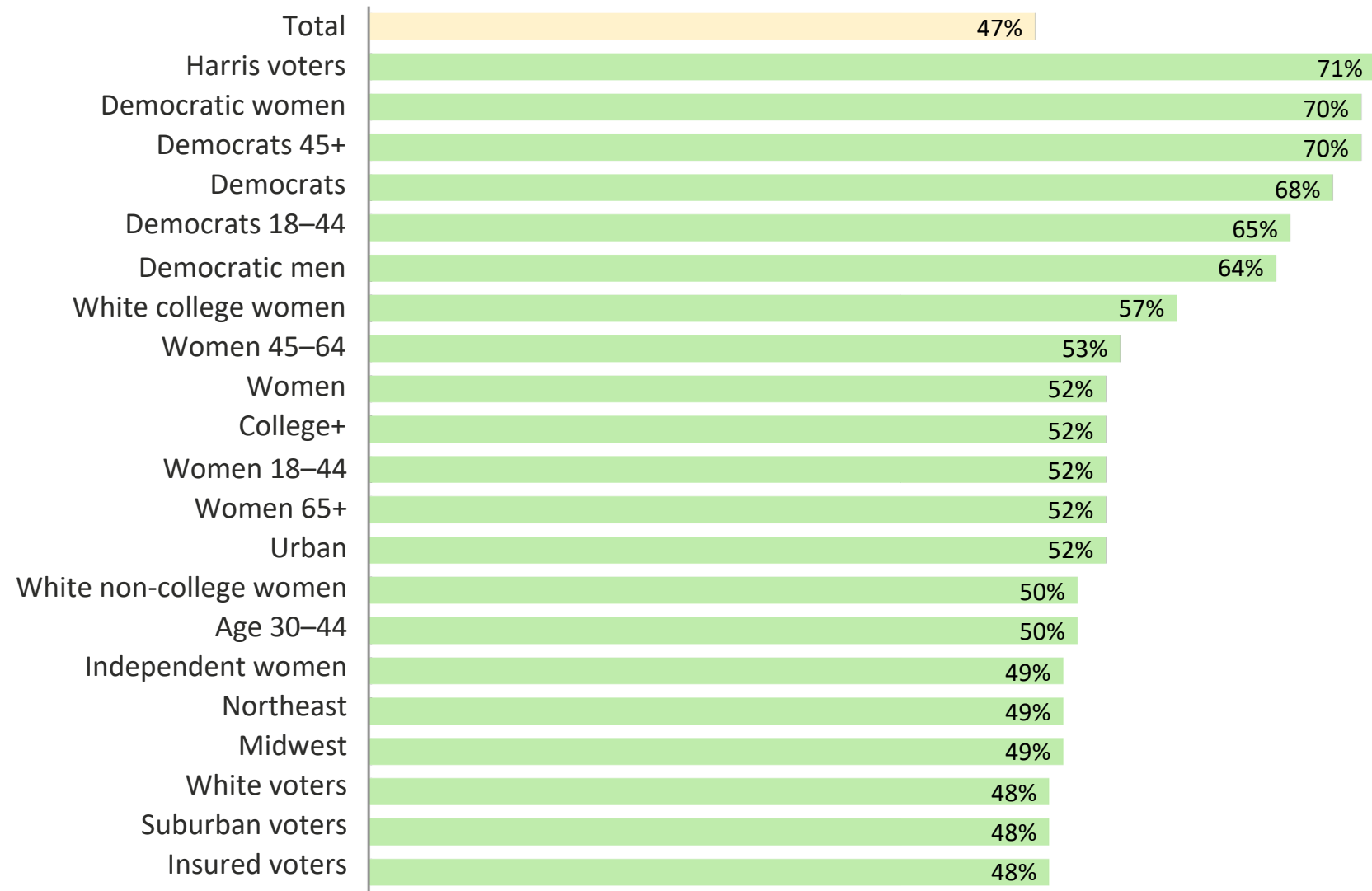


Q11: importance of lowering health care costs



Voter groups most concerned about the cost of health care

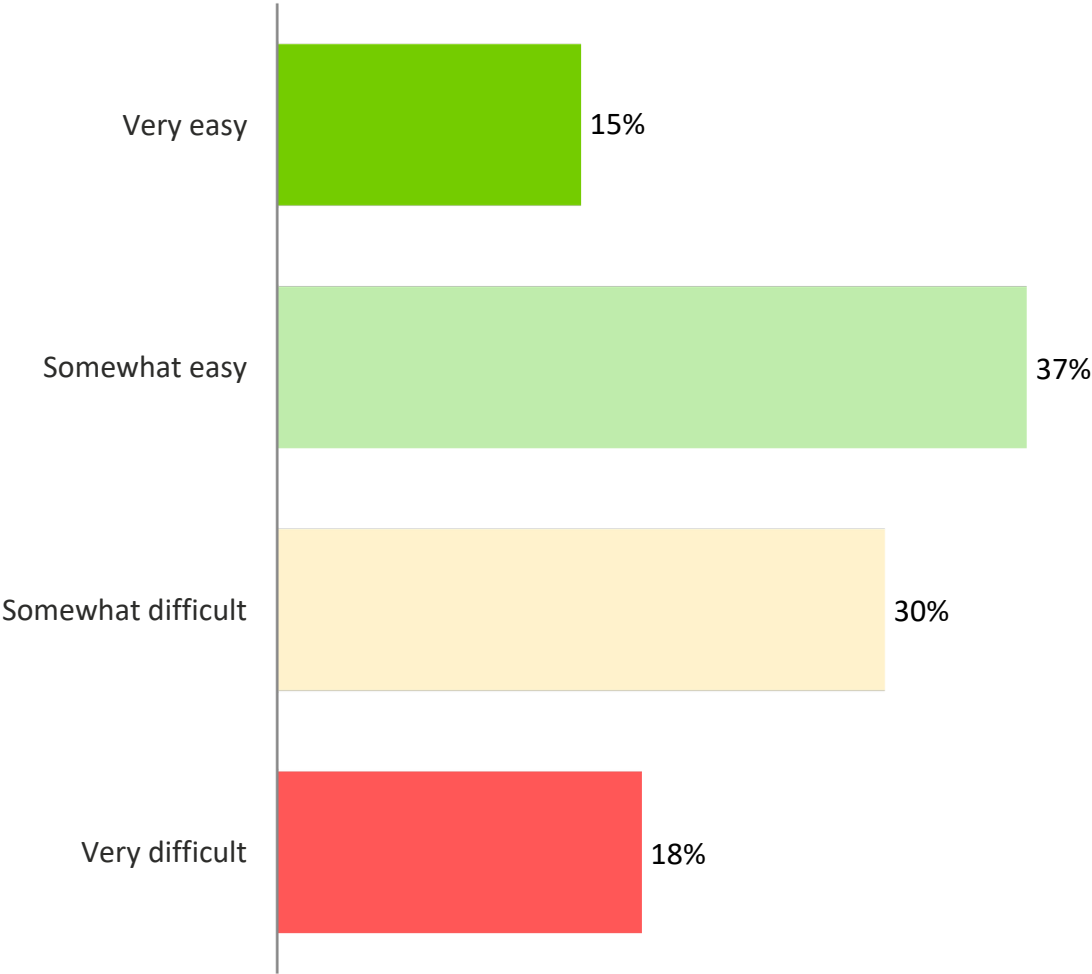
Q10: selected 'the cost of health care' as one of the two most important issues; groups above the total benchmark.



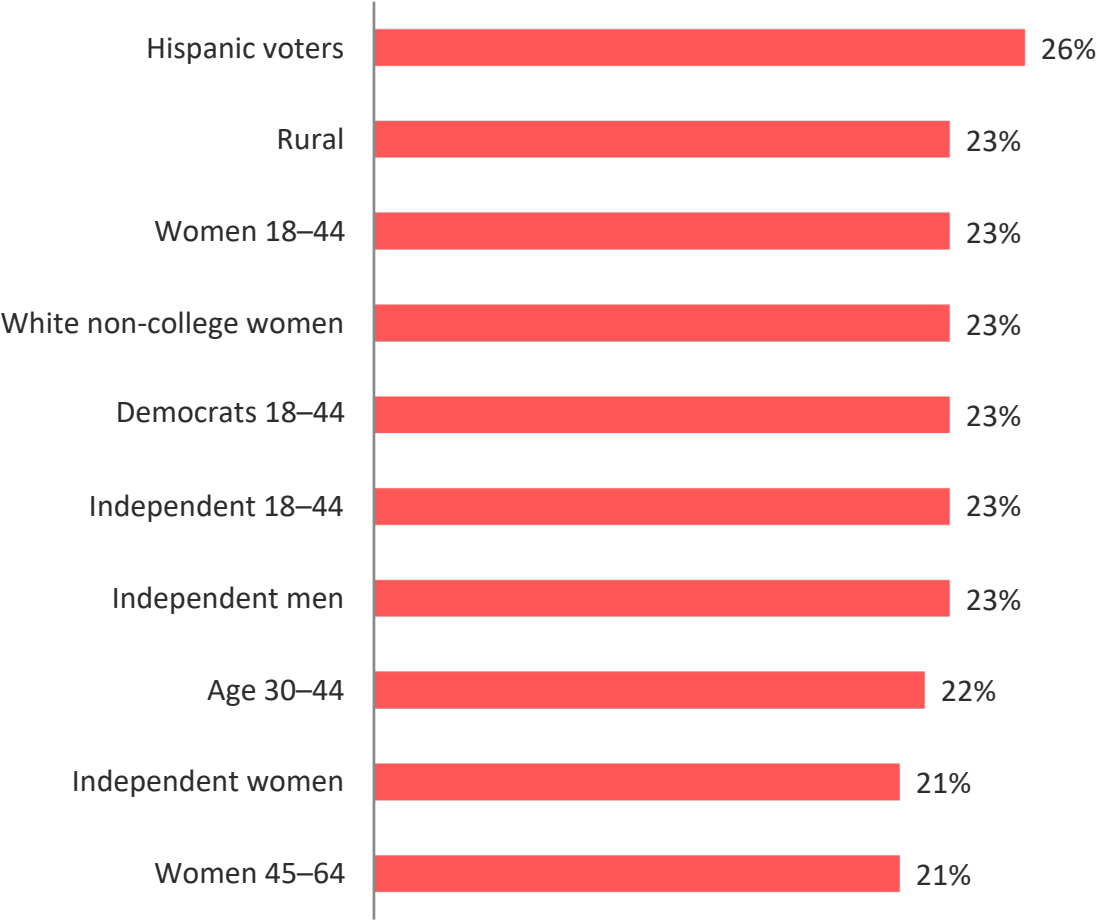
Affording the cost of health care

Q17:how easy or difficult is it for you to afford the cost of health care? **Overall: 52% easy - 48% difficult.**

Ease of affording health care costs

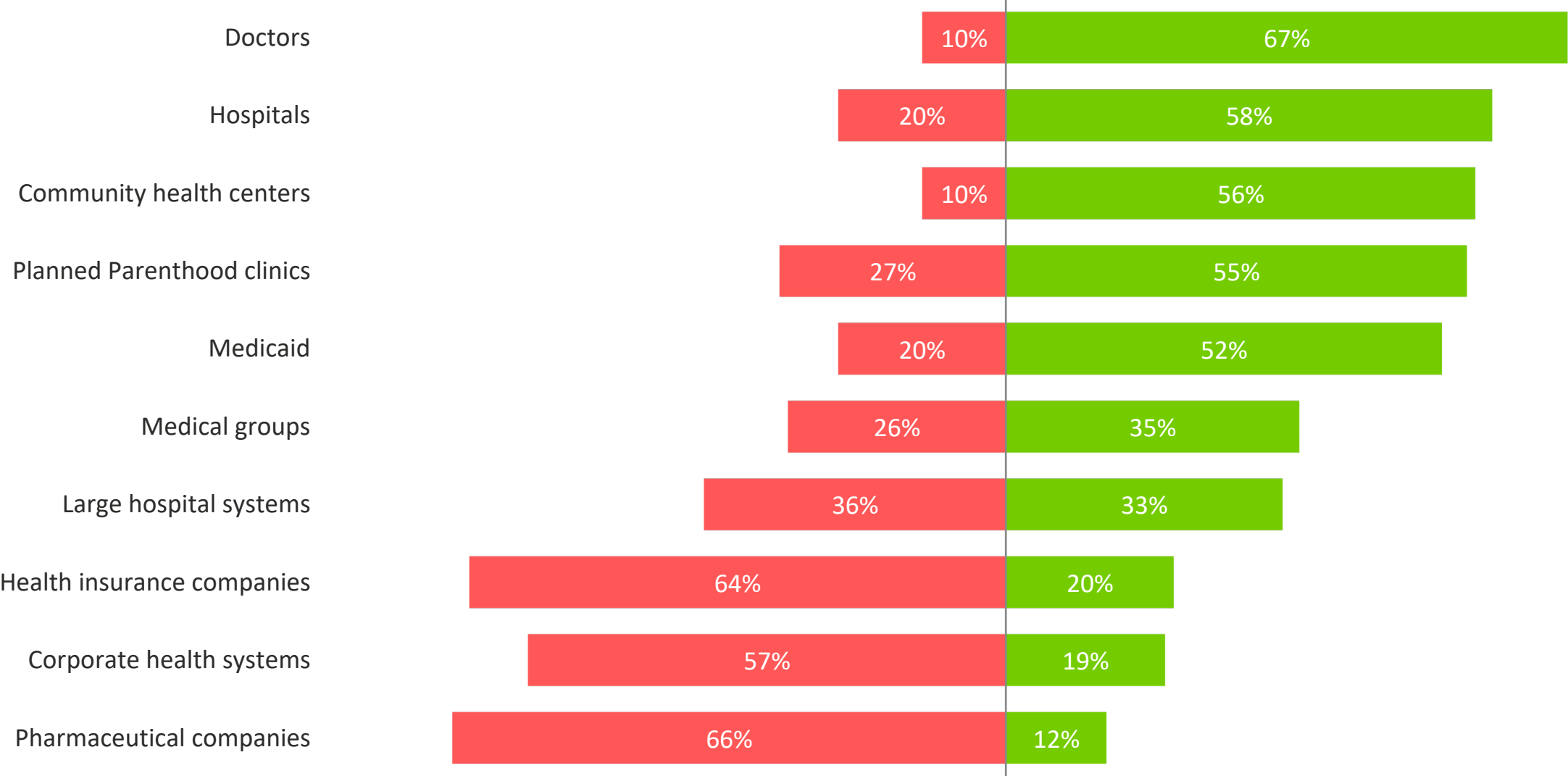


Most likely to say affording health care is “very difficult”



Favorability of health care groups and institutions

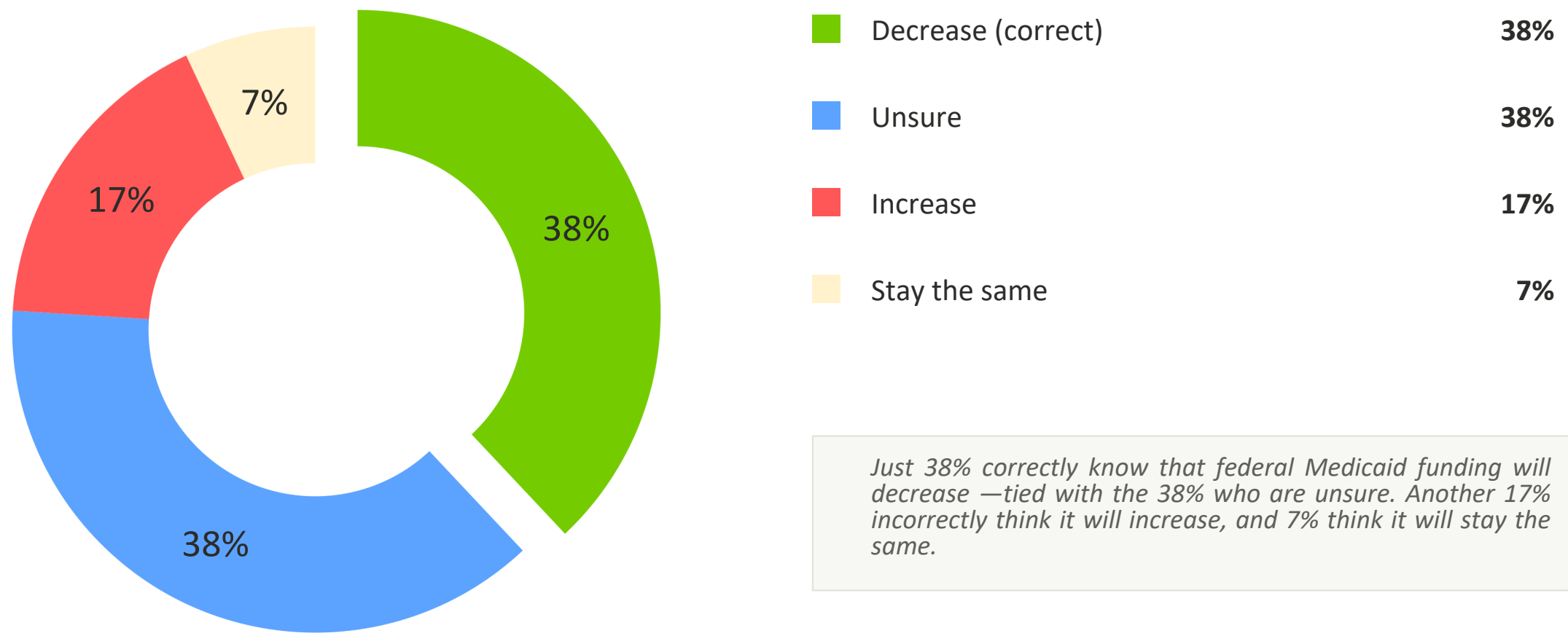
Q12a–Q16b. Total favorable vs. total unfavorable, ranked by favorable rating.



■ Favorable ■ Unfavorable

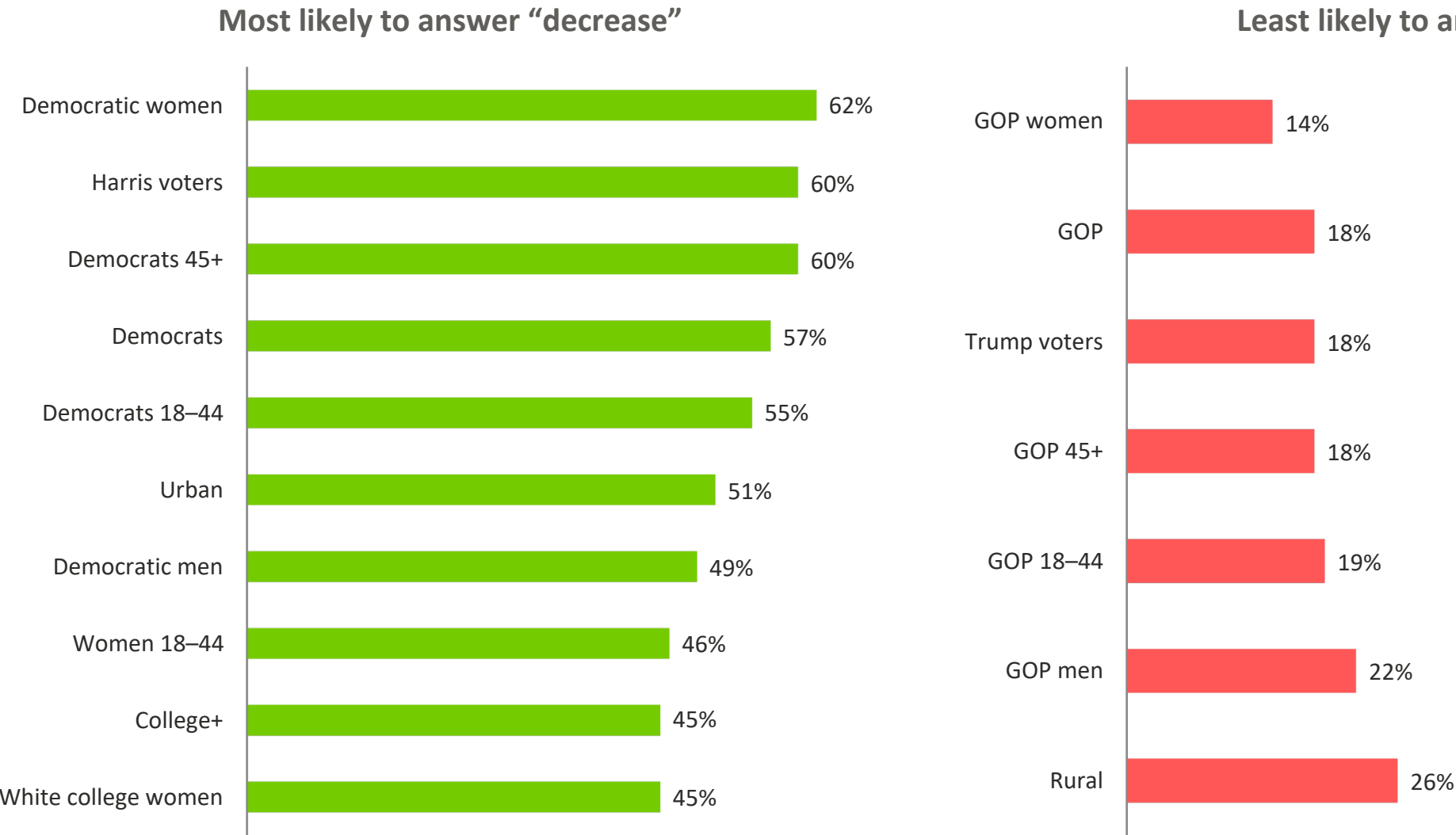
Awareness of federal Medicaid funding changes

Q18:to the best of your knowledge, is federal funding for Medicaid going to increase, decrease, or stay the same in the next year, or are you unsure?



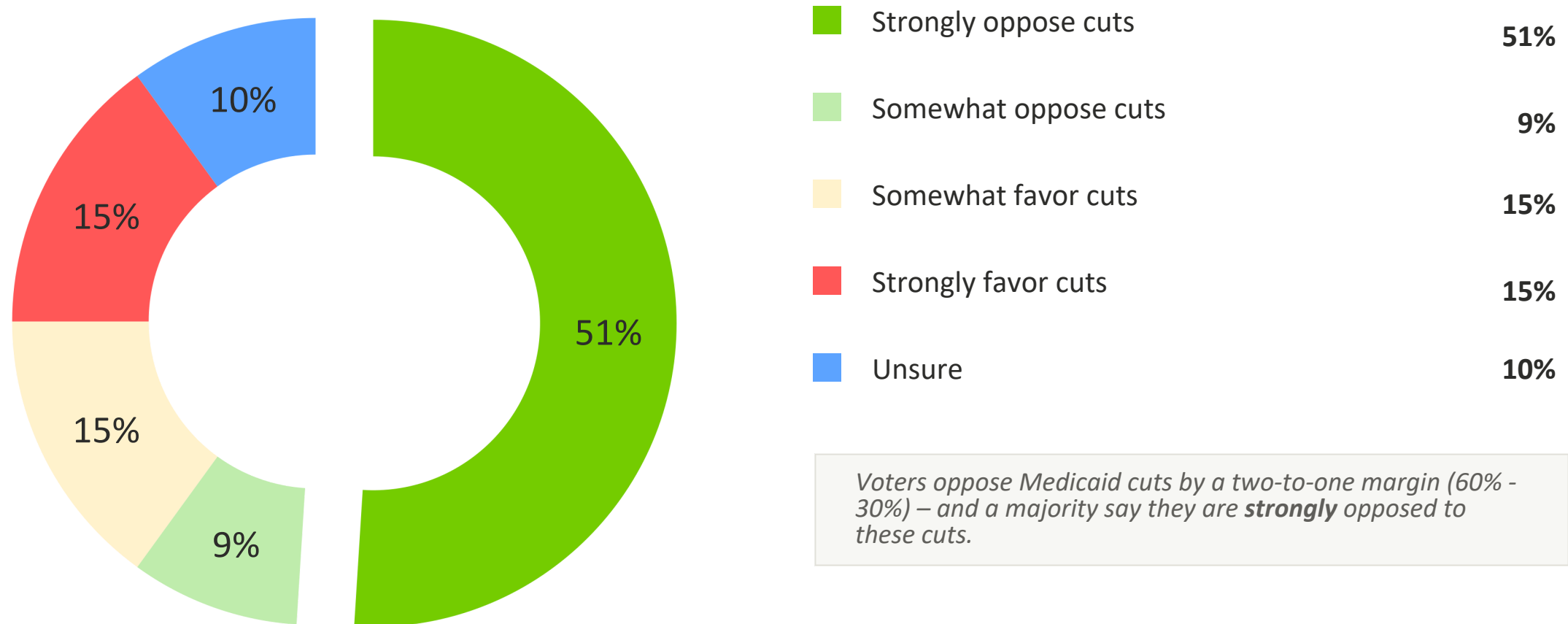
Awareness that federal Medicaid funding will decrease

Q18. Overall: 38% correctly answered “decrease.”



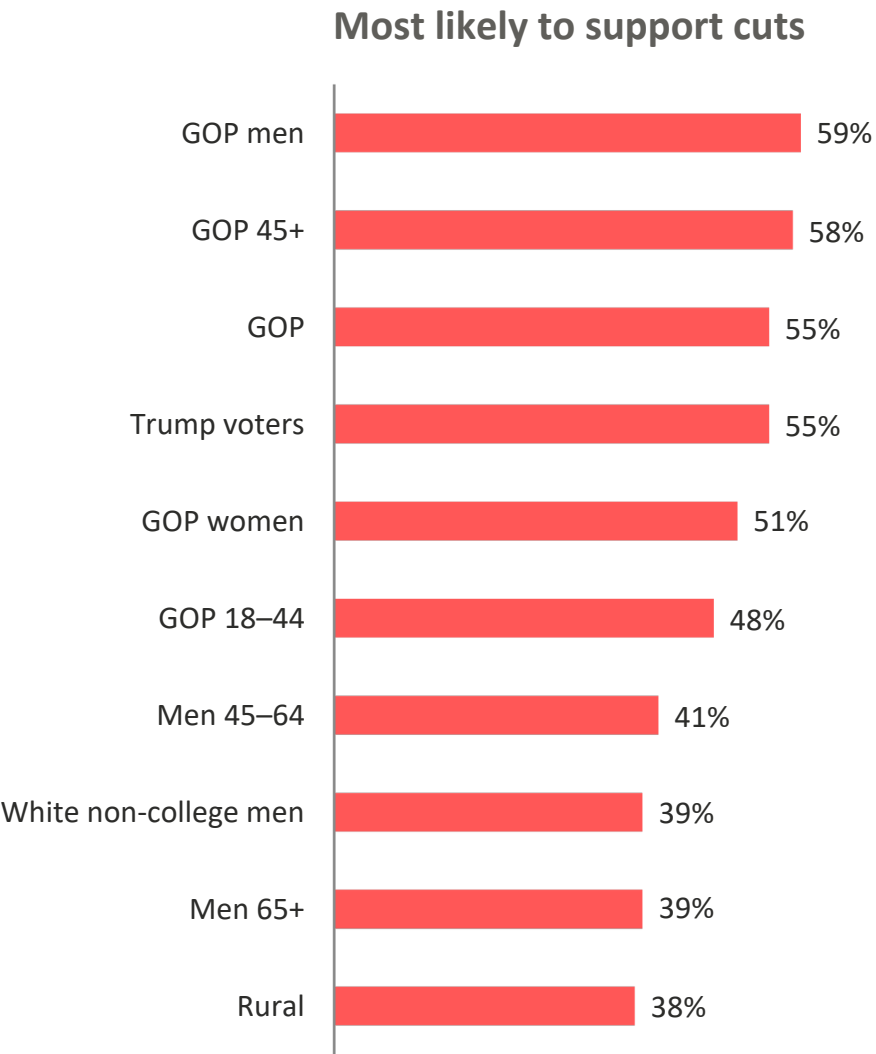
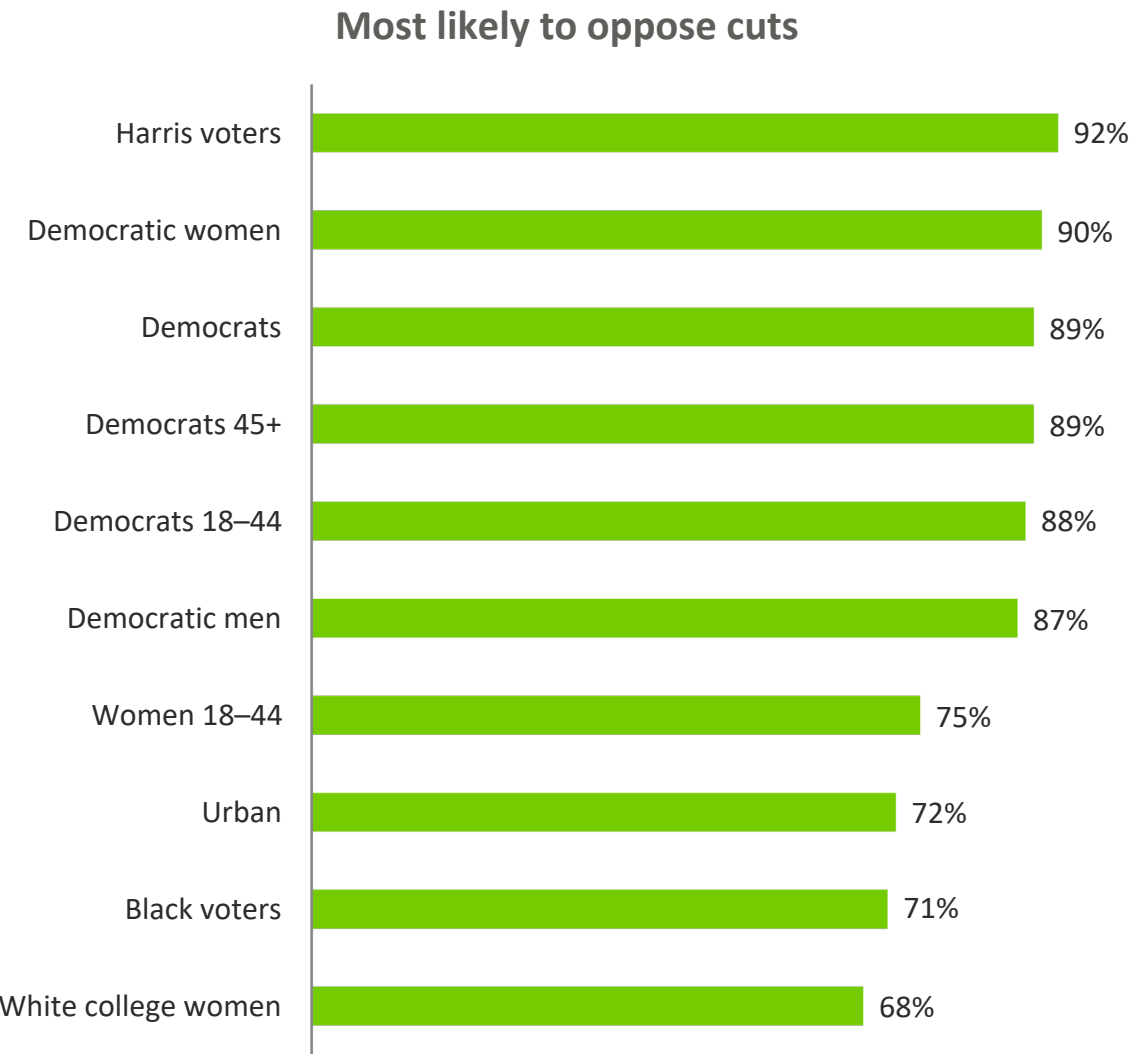
Views on federal Medicaid funding cuts

Q19: Congress passed legislation last year that will significantly reduce federal funding for Medicaid in upcoming years. Do you favor or oppose these cuts?



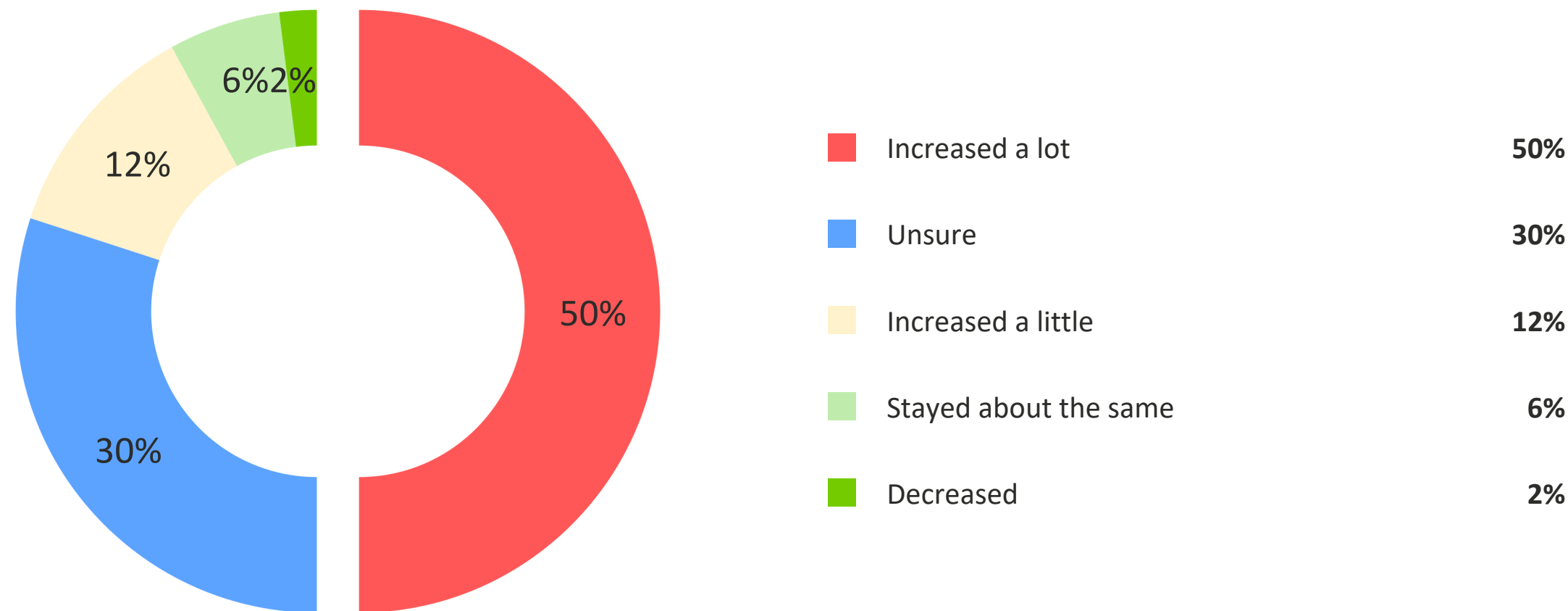
Groups most likely to oppose or support federal Medicaid funding cuts

Q19. Overall: 60% oppose cuts / 30% favor cuts.



Awareness of ACA premium pricing

Q29:in the last year, do you think the cost of health insurance premiums offered through the ACA marketplace has...

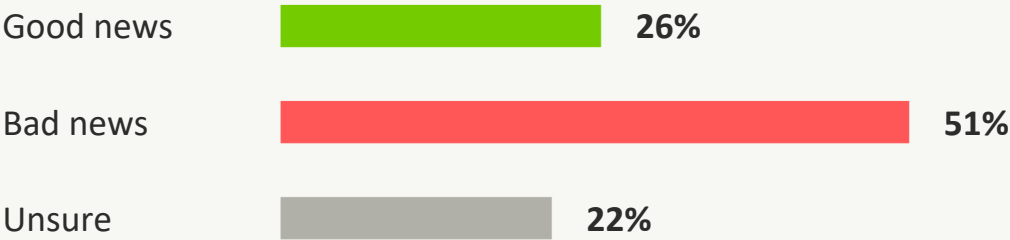


ACA enrollment decline: Comparing narratives

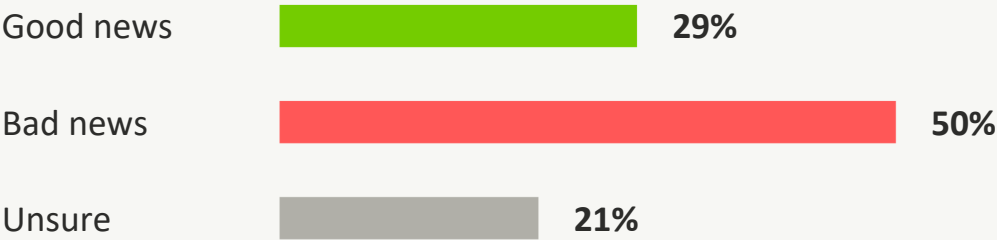
Q30: the government released a report last week that showed ACA enrollment declined by nearly 4 million people in the past year. Respondents saw one of two framings of the disagreeing view (split sample).

The federal government says:
This drop is good news — a result of removing fraudulent and phantom enrollment from the system. COVID-era policies were too loose and expensive, allowing millions of people to sign up improperly or allowing insurance brokers to sign people up for no-cost plans without their knowledge.

STATEMENT B (n=520)
Those who disagree say: This drop is bad news. Blaming millions of Americans who were able to get ACA coverage for fraud is an insult to working families. There are not millions of phantom enrollees signing up for ACA plans—the federal government let health costs rise, and millions of people can no longer afford this coverage.

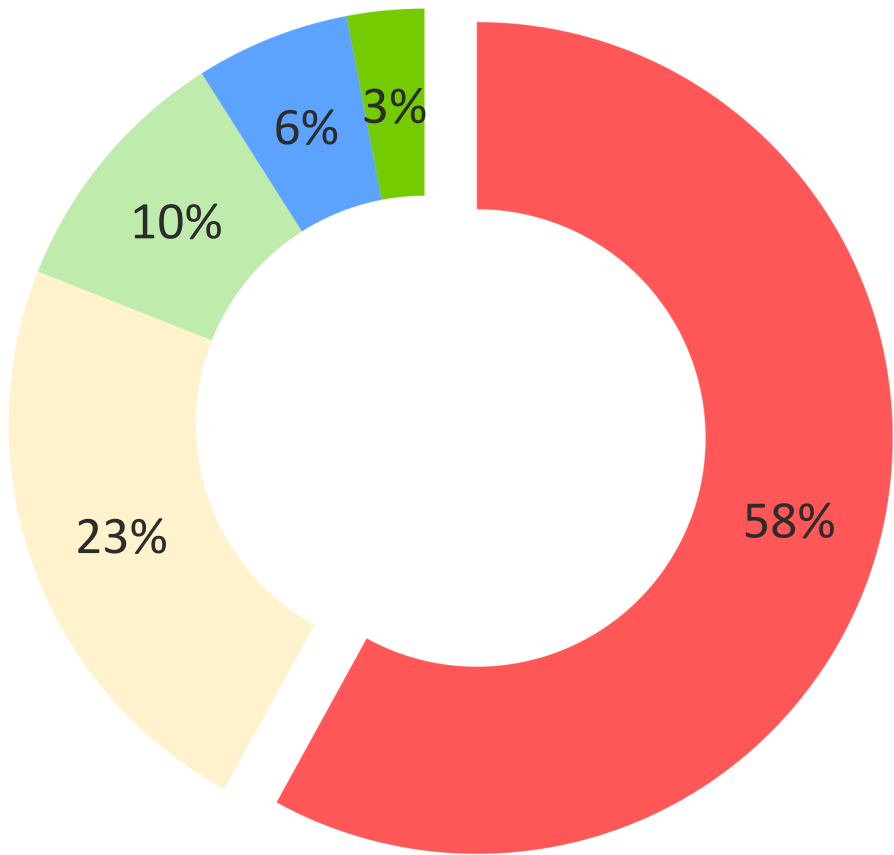


STATEMENT C (n=521)
Those who disagree say: This drop is bad news. Two years ago, ACA enrollment hit record highs because the government expanded tax credits so nobody would spend more than 8.5% of their income on premiums. Now Congress ended those credits and premiums have skyrocketed, forcing millions to drop coverage because they can't afford it.



Perception of hospital prices

Q31:do you think the fees and prices charged by hospitals are...



Very unreasonable	58%
Somewhat unreasonable	23%
Somewhat reasonable	10%
Unsure	6%
Very reasonable	3%

81% say hospital prices are unreasonable—
58% “very” versus just 12% who call them reasonable — a
near-consensus view that crosses party lines.

What happens when a hospital joins a large system?

Q32:if an independent hospital in your community became part of a large hospital system, do you think that...

