NC Statewide Healthcare Survey

Executive Summary: May 2026

To: Affordable Healthcare Coalition of North Carolina
From: Differentiators Data

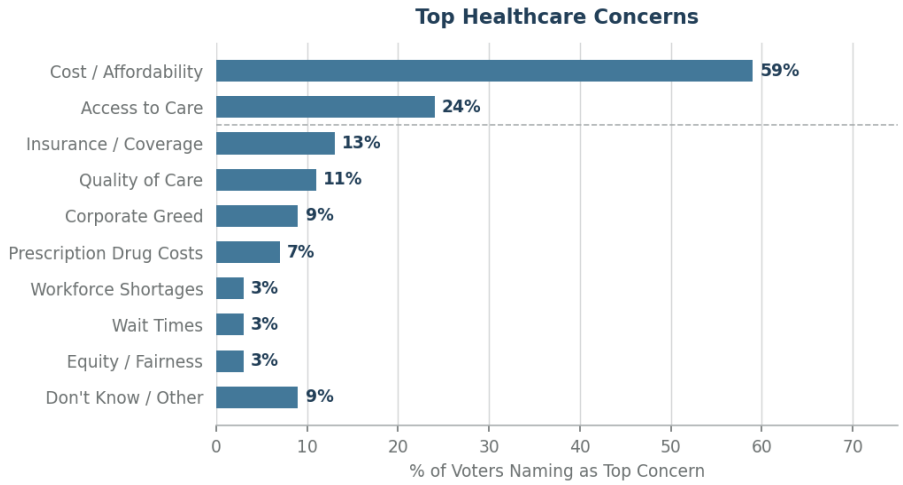
Methodology

Differentiators Data conducted a survey of general election voters to assess public opinion on healthcare issues and specific policy proposals. The data for the survey was gathered through multi-modal responses from 600 likely general election voters April 23-26, 2026, with a margin of error of +/- 4.1%. Interviews were conducted 10% landline, 55% cell phone, and 35% text-to-web.

Big Picture Takeaways

- **Cost is voters' top healthcare concern.** A majority cited cost and affordability as the healthcare issue that concerns them the most, more than access, coverage and quality.
- **Voters overwhelmingly back cost-cutting healthcare reforms**. Every proposal tested in this survey garnered more than 50% support, and seven of the 10 proposals were backed by at least 85% of likely voters.
- In the most jarring sign yet that voters are fed up with healthcare costs, implementing **a single-payer healthcare system – also known as Medicare for All** – is backed by a majority of voters.

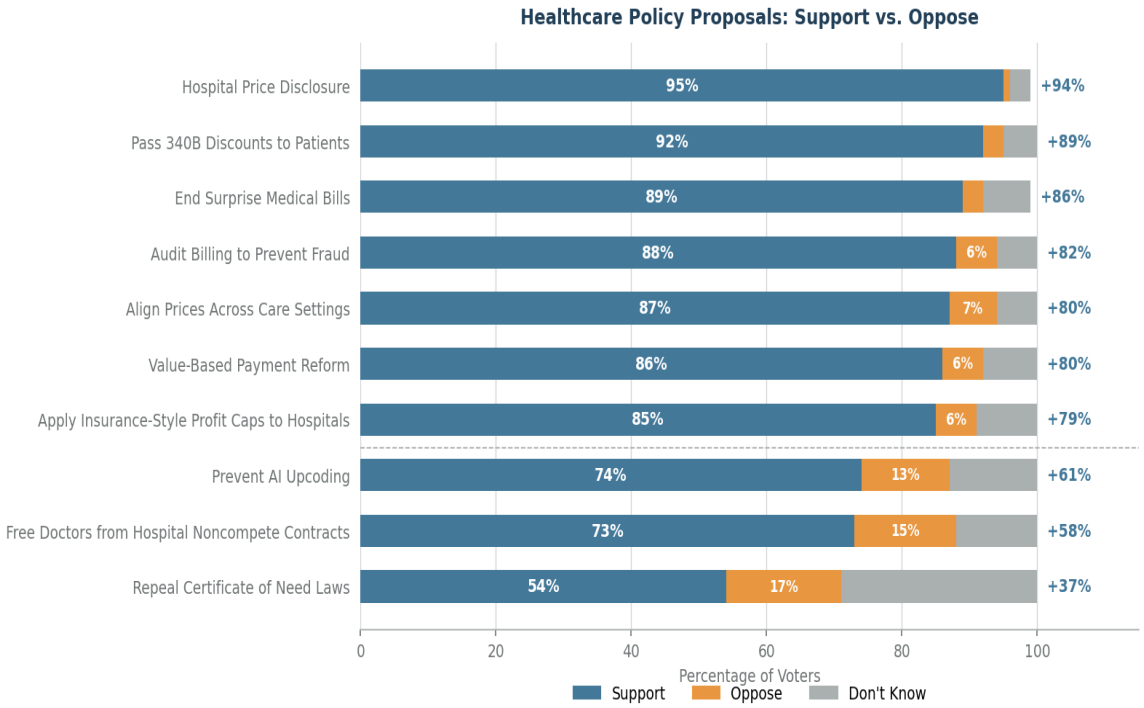
Top Healthcare Concerns



When asked, ***"When you think about healthcare, including doctors, hospitals, treatments, prescription drugs and access to care, what are the one or two issues that concern you most? If you had to name one issue what would it be?"*** 59% of voters name cost and affordability unprompted, including a majority of Republicans, Democrats and Unaffiliated voters. That's more than double the concern about access to care (24%). 13% of voters cited insurance and coverage concerns and 9% said corporate greed.

Healthcare Policy Proposals

We tested 10 policy proposals that could address high healthcare costs: Repealing Certificate of Need (CON) laws, banning hospital non-competes, stopping AI upcoding, capping hospital profits, value-based care reform, site neutrality in billing, auditing hospital billing, stopping surprise medical bills, passing 340b drug program savings to patients, and hospital price transparency.



Net score (support minus oppose) is shown to the right of each bar

Hospital price transparency (95%), passing 340B drug savings to patients (92%), and ending surprise billing (89%) tested the highest. Republicans, Democrats, and Unaffiliated voters almost universally agree on every proposal. While more than half (54%) support repealing CON laws, 29% responded "don't know" – likely a reflection of the issue's complexity.

Proposal	Total	GOP	Dem	Una	Net
Hospital Price Disclosure	**95%**	93%	97%	96%	**+94%**
Pass 340B Discounts to Patients	**92%**	88%	97%	92%	**+90%**
End Surprise Medical Bills	**89%**	84%	98%	87%	**+86%**
Audit Billing to Prevent Fraud	**88%**	83%	92%	89%	**+82%**
Align Prices Across Care Settings	**87%**	84%	96%	81%	**+80%**
Value-Based Payment Reform	**86%**	84%	89%	85%	**+80%**
Apply Insurance-Style Profit Caps to Hospitals	**85%**	81%	92%	82%	**+79%**
Prevent AI Upcoding	**74%**	71%	79%	72%	**+61%**
Free Doctors from Hospital Noncompete Contracts	**73%**	69%	76%	75%	**+58%**
Repeal Certificate of Need Laws	**54%**	56%	50%	55%	**+36%**

% supporting | Net = total support minus total oppose

Single-Payer Healthcare / Medicare for All

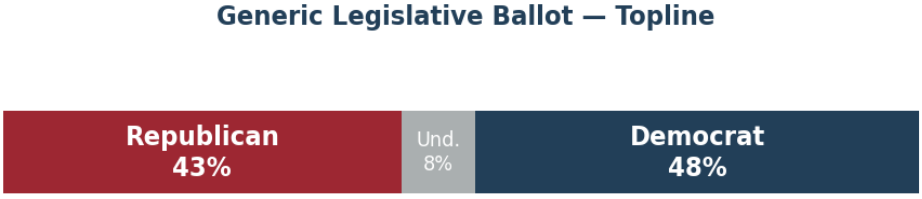
"Do you support or oppose the United States implementing a single-payer healthcare system, sometimes called 'Medicare for All,' in which all Americans would get their insurance from the government?"



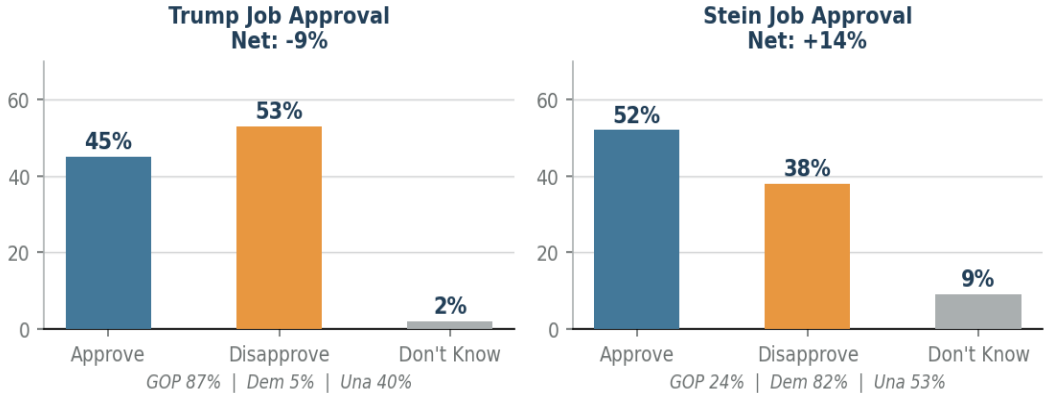
51% of voters support all Americans getting their insurance from the government. More than three-fourths (86%) of registered Democrats support single payer, along with 51% of Unaffiliated voters. Only 17% of Republicans support.

2026 Political Environment

Democrats lead Republicans 48%-43% on the generic legislative ballot (+5%). **Unaffiliated voters are the problem for Republicans:** they break for Democrats 50% to 38%.



And voters disapprove of President Donald Trump's job performance by a margin of 53%-45%. Unaffiliated voters disapprove of Trump by a 17-point margin, 57% to 40%. Governor Josh Stein's approval sits at 52% approve and 38% disapprove.



DIFFERENTIATORS DATA

NC STATEWIDE SURVEY (N=600)
LIKELY GENERAL ELECTION VOTERS
CONDUCTED: 4/23 – 4/26/26
MARGIN OF ERROR: +/- 4.1%
METHODOLOGY: 55% LIVE CELL, 10% LAND, 35% TEXT-TO-WEB

1. Regardless of how you vote, with which political party are you registered?

REPUBLICAN	33%
DEMOCRAT	31%
UNAFFILIATED/OTHER	36%

2. Thinking ahead to the 2026 General Election for US Senate, US Congress and State Legislature — how likely is it that you will vote? Would you say you are very likely, somewhat likely, or not likely at all to vote in the 2026 General Election?

VERY LIKELY	93%
SOMEWHAT LIKELY	7%

3. If the 2026 general election for State Legislature in Raleigh were held today, for whom would you vote?

REPUBLICAN CANDIDATE	**43%**
Vote	41%
Lean	2%
DEMOCRATIC CANDIDATE	**48%**
Vote	48%
Lean	*%
UNDECIDED	8%

4. Do you approve or disapprove of the job Donald Trump is doing as President?

APPROVE	45%
DISAPPROVE	53%
DON'T KNOW/REFUSED	2%
Net Difference	-8%

5. Do you approve or disapprove of the job Josh Stein is doing as Governor?

APPROVE	52%
DISAPPROVE	38%
DON'T KNOW/REFUSED	9%
Net Difference	14%

6. When you think about healthcare, including doctors, hospitals, treatments, prescription drugs and access to care, what are the one or two issues that concern you most? If you had to name one issue, what would it be?

COST/AFFORDABILITY	59%
ACCESS TO CARE	24%
INSURANCE/COVERAGE	13%
QUALITY OF CARE	11%
CORPORATE GREED	9%
PRESCRIPTION DRUG COSTS	7%
WORKFORCE SHORTAGES	3%
WAIT TIMES	3%
EQUITY/FAIRNESS	3%
OTHER	6%
DON'T KNOW/REFUSED	3%

7. Do you believe that healthcare should be a basic human right?

YES	71%
NO	20%
DON'T KNOW/REFUSED	9%

8. Do you believe it is the government's responsibility to ensure all Americans have healthcare coverage?

YES, GOV'T RESPONSIBLE	53%
NO, GOV'T NOT RESPONSIBLE	41%
DON'T KNOW/REFUSED	6%

9. Do you support or oppose the United States implementing a single-payer healthcare system, sometimes called "Medicare for All," in which all Americans would get their insurance from the government?

SUPPORT	**51%**
Strongly	31%
Somewhat	20%
OPPOSE	**43%**
Somewhat	9%
Strongly	33%
DON'T KNOW/REFUSED	7%

Now, thinking more about several healthcare proposals being considered in North Carolina, would you support or oppose the following…

10. … giving the state stronger authority to audit hospital and provider billing, to ensure insurance claims are accurate and prevent fraud or overbilling.

SUPPORT	**88%**
Strongly	64%
Somewhat	24%
OPPOSE	**6%**
Somewhat	3%
Strongly	3%
DON'T KNOW/REFUSED	6%

11. …requiring hospitals to publicly disclose prices for medical procedures so patients know the cost before receiving care.

SUPPORT	**95%**
Strongly	81%
Somewhat	14%
OPPOSE	**1%**
Somewhat	1%
Strongly	*%
DON'T KNOW/REFUSED	3%

12. …changing the healthcare payment system so healthcare providers are rewarded for keeping people healthy and delivering good health outcomes, instead of being paid mainly for the number of tests or procedures they perform.

SUPPORT	**86%**
Strongly	61%
Somewhat	25%
OPPOSE	**6%**
Somewhat	5%
Strongly	1%
DON'T KNOW/REFUSED	8%

13. … requiring hospitals that buy prescription drugs at federally discounted prices to pass those full savings on to patients instead of raising the price of the drugs and reselling the drugs to patients for a profit.

SUPPORT	**92%**
Strongly	80%
Somewhat	12%
OPPOSE	**3%**
Somewhat	1%
Strongly	1%
DON'T KNOW/REFUSED	5%

14. …like insurance companies, requiring hospital systems to publicly report how much money they make each year, cap hospital profits and require them to spend 80-85% on patient care, and publicly disclose their spending on executive salaries, lobbying and administrative overhead.

SUPPORT	**85%**
Strongly	65%
Somewhat	20%
OPPOSE	**6%**
Somewhat	4%
Strongly	2%
DON'T KNOW/REFUSED	9%

15. …repealing North Carolina's Certificate of Need laws, also known as C – O – N. Even when a community has a shortage of doctors or healthcare services, the state's C– O – N laws require hospitals and healthcare providers to go through a costly and time-consuming state approval process before they can build new assisted living facilities, hospitals, or other treatment centers.

SUPPORT	**54%**
Strongly	29%
Somewhat	25%
OPPOSE	**17%**
Somewhat	12%
Strongly	5%
DON'T KNOW/REFUSED	29%

16. …ending surprise medical bills by capping how much patients can be charged for out-of-network care and requiring clear notice when providers are out of network.

SUPPORT	**89%**
Strongly	75%
Somewhat	14%
OPPOSE	**3%**
Somewhat	2%
Strongly	1%
DON'T KNOW/REFUSED	7%

17. …prohibiting hospitals and healthcare providers from using A-I to order medically unnecessary tests and procedures that raise patients' bills and boost provider profits.

SUPPORT	**74%**
Strongly	56%
Somewhat	18%
OPPOSE	**13%**
Somewhat	7%
Strongly	6%
DON'T KNOW/REFUSED	13%

18. …prohibiting hospitals from requiring doctors and nurses to sign noncompete agreements that keep them from leaving the hospital and working at other healthcare facilities. Noncompete agreements reduce competition, limit access to care in rural areas, and drive up costs for patients.

SUPPORT	**73%**
Strongly	55%
Somewhat	18%
OPPOSE	**15%**
Somewhat	8%
Strongly	7%
DON'T KNOW/REFUSED	12%

19. Patients who need medical services – such as MRIs, infusions, tests or specialty injections – often pay much higher prices for these services at big hospitals systems than they would at lower-cost, independent doctor's offices or surgical centers. Aligning the prices so patients pay similar amounts for services no matter where they receive care could reduce out-of-pocket healthcare costs and insurance premiums.

Knowing this, would you support or oppose aligning prices so patients pay similar amounts for the same medical services regardless of where they receive the care?

SUPPORT	**87%**
Strongly	66%
Somewhat	20%
OPPOSE	**7%**
Somewhat	4%
Strongly	3%
DON'T KNOW/REFUSED	6%

20. Now that you've heard more about some of the healthcare policy proposals under consideration in North Carolina, if you could wave a magic wand and make one change today to improve access to healthcare and to make healthcare more affordable what would it be? If you had to name one thing, what would it be?

LOWER COSTS	23%
HC ACCESS FOR ALL	21%
END FOR PROFIT	17%
IMPROVE HEALTHCARE	12%
TRANSPARENCY/REGULATIONS	8%
NOT FOR ILL. IMMIGRANTS	4%
OTHER	7%
DON'T KNOW/REFUSED	9%

21. Thinking back, for whom did you vote in the November 2024 Presidential election?

DONALD TRUMP	48%
KAMALA HARRIS	46%
ANOTHER CANDIDATE	2%
DID NOT VOTE	2%
DON'T KNOW/REFUSED	2%

22. If you were to label yourself, would you say you are a liberal, a moderate, or a conservative in your political beliefs?

LIBERAL	**29%**
Very	13%
Somewhat	16%
MODERATE	**27%**
CONSERVATIVE	**42%**
Somewhat	21%
Very	21%
DON'T KNOW/REFUSED	2%

23. On the issue of abortion, do you consider yourself pro-life or pro-choice?

PRO-LIFE	**42%**
Strongly	28%
Somewhat	15%
PRO-CHOICE	**54%**
Somewhat	16%
Strongly	38%
DON'T KNOW/REFUSED	4%

24. What is the last grade of formal education you have completed?

LESS THAN COLLEGE	**64%**
Less than High School	2%
High School Graduate	10%
Some College/Trade	35%
Associates/2-yr Degree	16%
COLLEGE/POST GRADUATE	**36%**
Bachelors/4-yr Degree	20%
Post Graduate Degree	17%

25. Do you have a child on your health insurance plan?

YES	27%
NO	72%
DON'T KNOW/REFUSED	2%

26. Which of the following social media sites do you use daily?

FACEBOOK	50%
YOUTUBE	40%
INSTAGRAM	34%
TIK TOK	16%
X/TWITTER	14%
LINKEDIN	13%
TRUTH SOCIAL	4%
NONE	21%
DON'T KNOW/REFUSED	3%

27. What is your main racial background?

WHITE/CAUCASIAN	**75%**
NON-WHITE	**25%**
African-American/Black	19%
Hispanic/Latino	3%
Asian/Asian-American	2%
Other	1%
REFUSED	-

28. What is your age? Are you between…?

18-34	16%
35-44	15%
45-54	17%
55-64	20%
OVER 64	32%
REFUSED	-
Mean	52.80

29. Gender:

MALE	45%
FEMALE	55%

30. Interview Mode:

LANDLINE PHONE	10%
CELL PHONE	55%
TEXT-TO-WEB	35%

31. Media Market:

MAJOR MARKETS	**75%**
Greensboro	17%
Charlotte	27%
Raleigh Durham	31%
REST OF STATE	**25%**
Greenville - N. Bern	7%
Wilmington/F-Myrtle B	7%
Spart/Ash/ATL/Chat.	9%
Norfolk	2%

32. Region:

STRONG DEMOCRAT COUNTIES	36%
SWING COUNTIES	28%
STRONG REPUB. COUNTIES	37%

33. Region 2:

RURAL	32%
EXURBAN	26%
URBAN	42%

34. Primary Ballot Indicator (Unaffiliated)

NONE	**49%**
VOTED GOP	**17%**
Only Voted GOP	11%
Voted Majority GOP	6%
VOTED EQUAL GOP/DEM	**2%**
VOTED DEM	**32%**
Voted Majority Dem	9%
Only Voted Dem	23%

35. General Vote History for Household (2024, 2022, 2020):

NEWLY REGISTERED	4%
1 OF 3	13%
2 OF 3	24%
3 OF 3	60%

36. Household Vote in 2024 GEN:

YES	95%
NO	5%

37. Household Vote in 2022 GEN:

YES	67%
NO	33%