

2026 STATE OF PLAY NATIONAL HEALTHCARE SURVEY

# Navigating the Riptide

## Public views on healthcare, health policy, and healthcare organizations.

Deep concern about the high cost of care and belief that the industry puts profits over patients is fueling a powerful riptide of consumer discontent with healthcare, sweeping providers and payers in a forceful current that leaves them vulnerable to opportunistic politics, damaging misinformation and swift moving, cost-minded competitors.

In our latest national survey, six in ten say healthcare is headed in the wrong direction and seven in ten say the whole system needs significant reform. In our findings:

- + **Three quarters** of people say cost is a top issue for healthcare today.
- + **More than three quarters** say both providers and payers prioritize making money over taking care of people.
- + **Less than half** are confident that their local providers will be able to provide quality care in the years ahead.
- + **A quarter** say their trust in provider organizations has declined in the last year.

Field Dates: 1/2/26-1/5/26

Representative sample of U.S. adults age 18+

N = 1049

Margin of error: + 3.2%

# Swimming to shore

Yet in a sea of national consumer distrust that encompasses most institutions, healthcare – and especially healthcare providers – remain trusted more than most. It's an advantage not to be ignored. And in fact, the public wants (and expects) to hear from providers.

Healthcare has significant strengths the industry can use to change course. The opportunity to (re)build public support and leverage it to meet today's challenges is real. But it requires focus and fortitude to swim out of a rip tide.

## How?

The survey reveals opportunities to get back to the solid ground of trust and mission-driven alignment:

### Get in the game.

People trust providers and expect them to talk about important healthcare issues. Yet few people actually hear from them. While the decision to stay quiet may feel like a safe approach, in reality it creates a vacuum that can be filled by external forces. It's imperative to put energy into telling your story. Acknowledge cost concerns. Balance urgency with realism – don't cry wolf.

### Know that quality + community impact = trust.

Perception that hospitals put patients over profits has declined again. But about half think it's ok for hospitals to make more money as long as they provide quality care and are a good community partner. Another quarter is part of the moveable middle on this question. Emphasize community impact alongside the ever-present focus on quality.

### Focus on the moveable middle.

A notable number of people are unsure about where hospitals are headed in terms of quality care (and about a number of other questions). They can be persuaded. But will it be by you or someone else? A hyper-local and patient-centered story – ideally delivered by a white coat – that shows you understand the real pain points of the people you serve gives you the best chance to win support.

### Nine in 10

*Say hospitals, clinics and nursing homes should be involved in speaking publicly about healthcare policy changes*

### Half

*Aren't worried about provider profits as long as the care is good and they contribute to the community*

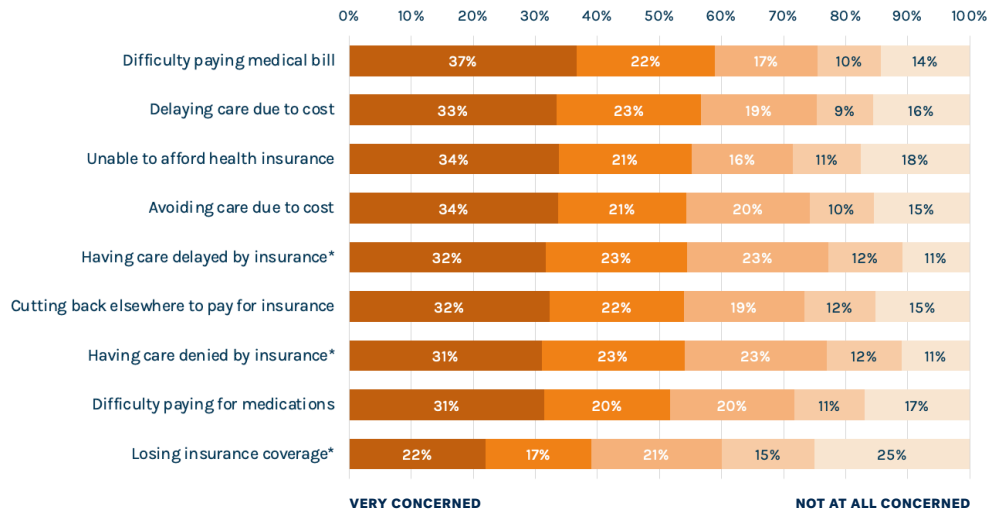
### One Third

*Say they are unsure whether local hospitals will deliver high quality care over the next few years*

# Challenges

**1 A majority are concerned about nearly every cost-related issue except for losing coverage**

*Thinking about the next year, how concerned are you about the following happening to you or your family?*

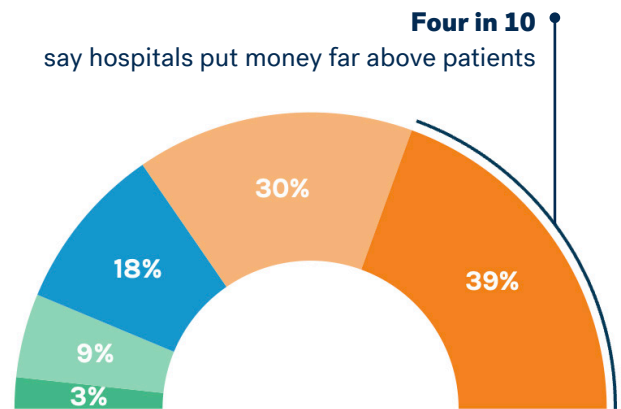


\*Excluding uninsured N = 946

**2 Perception of hospitals' motives has shifted again to match recent lows**

*Now thinking about this issue a little more, which statement about hospitals comes closest to your view?*

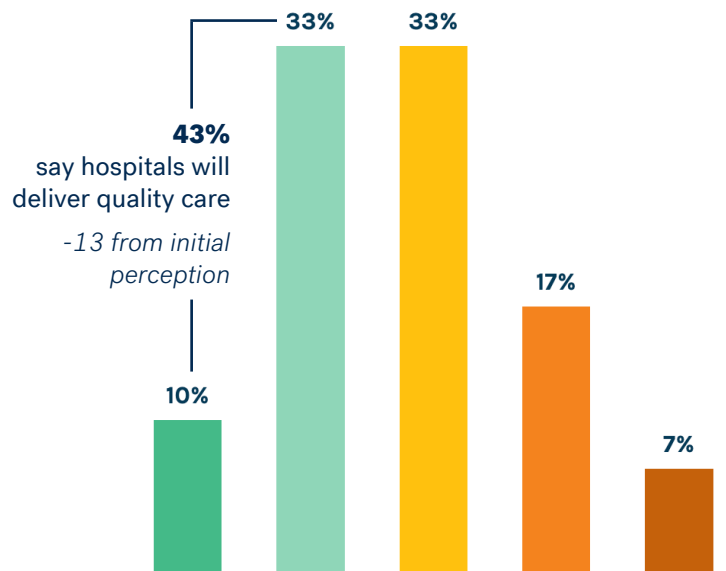
- They prioritize patient care far more than making money
- They prioritize patient care slightly more than money
- They balance making money and patient care equally
- They prioritize making money slightly more than patient care
- They prioritize making money far more than patient care



**3 After considering the state of healthcare and policy, only four in 10 have confidence in providers' ability to deliver quality care in the years ahead**

*Now, thinking about everything we've asked about, do you agree or disagree that local hospitals in your area will deliver high quality care over the next few years?*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

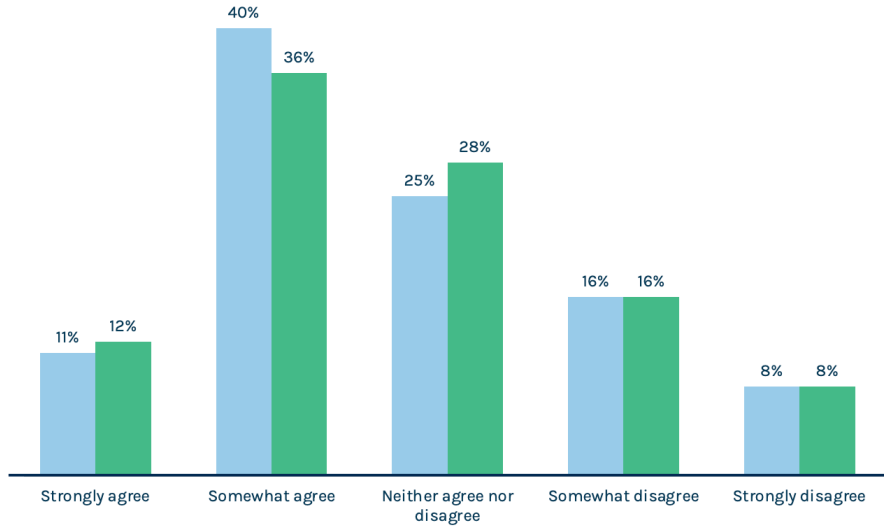


# Strengths

## 1 For many, quality and community impact outweigh concern about profits

Do you agree or disagree with the statement...

- "...It's ok if a hospital, clinic or nursing home works to make more money as long as **the care it provides is good.**"
- "...It's ok if a hospital, clinic or nursing home works to make more money as long as **it contributes positively to the community.**"

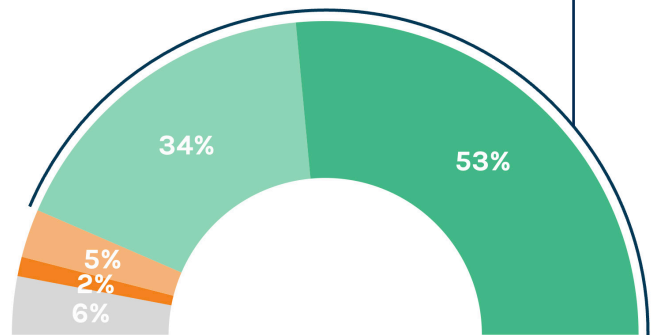


## 2 Nearly nine in 10 expect to hear from provider organizations about policy changes

When there are changes to laws and regulations that affect healthcare, how involved should organizations like hospitals, clinics and nursing homes be in speaking publicly about those changes?

- Very involved
- Somewhat involved
- Unsure
- Not very involved
- Not involved at all

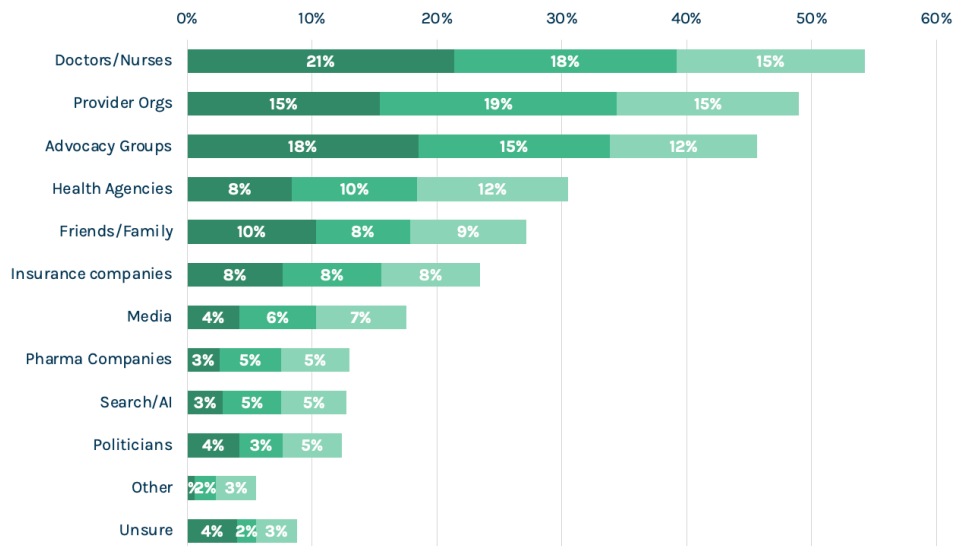
87% say providers should be active in communicating about policy implications



## 3 People most trust clinicians, providers and patient advocacy groups to explain healthcare policy

When there are changes to healthcare laws and regulations, which three of the following do you trust most to explain what those changes mean for patients?

- Most trusted
- Second most trusted
- Third most trusted

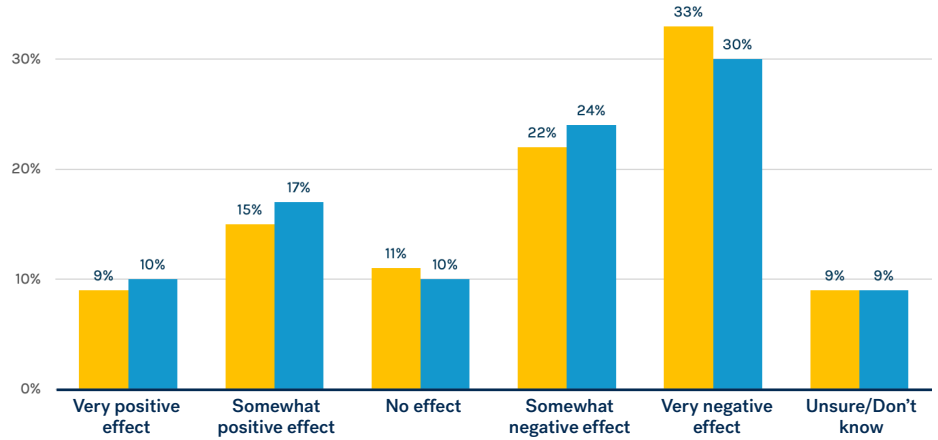


# Other issues we're tracking

## 1 Over half expect negative effects to U.S. healthcare due to changes to ACA subsidies and Medicaid

■ Do you think these funding changes to the **ACA/Obamacare** will have a positive or negative effect on healthcare in the U.S.?

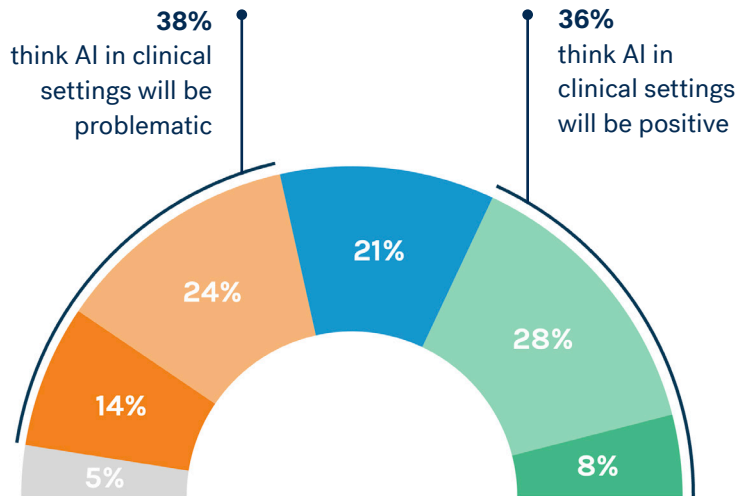
■ Do you think recent changes to **Medicaid** will have a positive or negative effect on healthcare in the U.S.?



## 2 The jury is still out on the use of AI in clinical settings

Doctors and nurses are beginning to use AI to help diagnose and treat patients. Do you think doctors and nurses using AI in this way will have a positive or negative effect on healthcare?

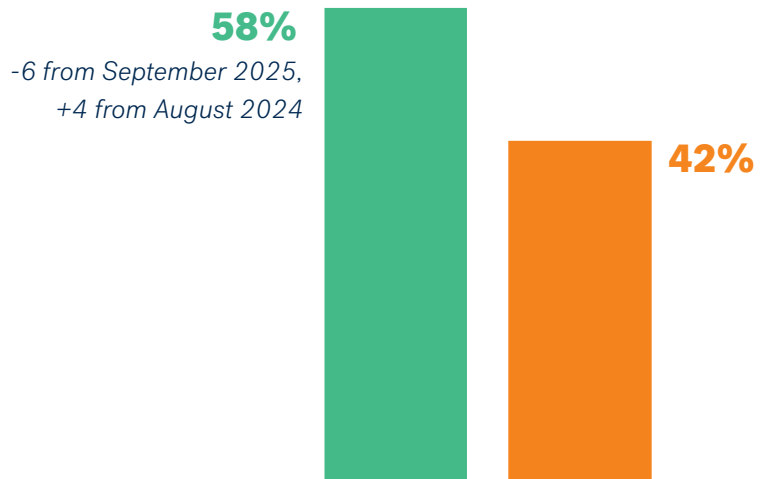
- Very positive
- Somewhat positive
- Neither positive nor negative
- Somewhat negative
- Very negative
- Unsure



## 3 About six in 10 view healthcare consolidation favorably, in line with recent trends

Which of the following views is closer to your own?

- Consolidation between hospitals, health systems and clinics is **good** for healthcare
- Consolidation between hospitals, health systems and clinics is **bad** for healthcare



# A note on differences, divisions and agreement

## **Large-scale public divisions are creating a lot of noise today.**

This is reflected in our survey where, on some healthcare issues, partisanship appears to drive perception. In other areas, we see smaller but still meaningful differences between different groups. It's understandable for the noise and division to feel all-consuming and paralyzing. Don't let it.

Importantly, the data also reveal areas where progress can be made and where you can leverage the strengths that exist:

- + **Trust in doctors and nurses.**
- + **Greater trust in provider organizations than other healthcare entities.**
- + **The immense community engagement and impact you provide.**

By using the tools above to tell a unique, local story, organizations can build trust, close gaps in perception, create clarity about the work underway and demonstrate a commitment to community and mission.

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*Other topics addressed in the full report include 340B, who the public blames for the cost of care, the perceived effect of ACA and Medicaid on access and cost, and differences in perception based on demographic and political differences.*

## **About Our Research Team**

The Jarrard Market Research & Insights (MRI) group specializes in understanding the interplay of stakeholder perceptions, motivations and behaviors – the literal and people politics that permeate healthcare – and the actions and messaging that will drive impact. We explore the right questions and develop solutions to deliver critical wins with measurable results.

Our custom quantitative and qualitative research can be scaled from micro- to national geographies, revealing critical insights and deep understanding of stakeholders that inform winning strategies. As a healthcare leader, you need to know where your most important constituencies stand and what messages resonate with them. This allows you to develop the right game plan to move them toward the action you want them to take. Our tailored strategies enable you to move swiftly with precision, delivering compelling messages through appropriate messengers and building trust.

**Interested in learning more? Connect with our team for a complimentary briefing and report with the full results.**

**[JARRARDINC.COM/MRI](https://jarrardinc.com/mri)**