

TO: Americans For Prosperity

FROM: i360

DATE: September 15, 2025

RE: ACA Enhanced Subsidy Expiration Research

Overview & Methodology

i360 conducted a mixed-mode, probability-based survey of 577 registered voters on September 10-12, 2025, to examine voter awareness, baseline attitudes, and message receptivity around the Affordable Care Act's (ACA) enhanced subsidies — temporary increases passed during the COVID-19 pandemic and extended under the Inflation Reduction Act (IRA). These subsidies are scheduled to expire at the end of 2025.

Respondents were drawn from a stratified random sample of i360's proprietary voter file and interviewed using a mixed-method approach: live phone interviews conducted by US-based operators (calling both landline and cell numbers), and text-to-web recruitment. Sampling quotas were set across demographic and political variables, including age, gender, education, and modeled partisanship, to ensure a representative sample and mitigate potential non-response bias.

Following the completion of interviews, i360 applied post-stratification weighting to variables such as age, gender, race, income, education, urban density, modeled partisanship, and geographic boundaries. This process aligned the survey sample with known and modeled population parameters of the target population. Weights were trimmed when necessary to minimize the impact of any single respondent on the overall results.

The maximum margin of sampling error for the weighted data is ± 4.1 percentage points at a 95% confidence level. This margin reflects sampling precision but does not account for other potential sources of error, such as non-response bias, coverage error, mode effects, or instrument bias.

Voter Awareness & Baseline Attitudes

- **Awareness remains extremely low.** Just 17% of voters say they have recently heard “a lot” about ACA changes. Of those, only 2% — representing 0.3% of registered voters nationwide — could correctly identify that the enhanced subsidies are scheduled to expire. This underscores that the debate is being shaped among a largely uninformed electorate .
- **Baseline opinion tilts toward expiration.** When presented with a neutral description of the policy background, voters favor allowing the subsidies to expire (38%) over extending them (30%), with a large one-third undecided .
- **Partisanship is strong but not exclusive.** Republicans lean strongly toward expiration and Democrats lean toward extension. However, about 20% of Democrats and 12% of Republicans buck their party's line. Importantly, modeled swing voters favor expiration by 10 points, with roughly a third still undecided . This means the coalition supporting expiration already includes millions of Democratic voters — and could expand further among swing voters.

Partisan Breakdown & Political Impact

- **Expiration unites Republicans.** Among GOP voters, allowing the subsidies to expire is a clear net positive: 37% say they would be more likely to support a Republican candidate who favors expiration, with only 8% less likely.
- **Extension risks GOP defections.** A Republican who backs extending the subsidies risks backlash: 26% say they'd be more likely to support such a candidate, but nearly as many (19%) say they'd be less likely.
- **Democrats are not monolithic.** While a majority favor extension, a notable 20% support expiration, and others are undecided. This level of Democratic crossover is unusual in today's polarized environment, suggesting expiration arguments can appeal across party lines in a way many other issues cannot.

Policy Priorities & Reform Preferences

Voters are open to healthcare reform, but not necessarily in the form of ongoing ACA subsidies.

- **Alternative reforms win decisively.** When asked to set priorities, voters overwhelmingly favor broad free-market reforms — such as tax-free Health Savings Accounts (HSAs) and direct primary care — over continuing ACA subsidies.
- **Cross-party appeal exists.** Swing voters favor these free-market solutions by 46 points, and more than a quarter (27%) of modeled Democrats also support this direction .
- **Broader system dissatisfaction is high.** Seventy-one percent of voters say the U.S. healthcare system is not working well. Even among those with employer coverage — traditionally the most satisfied group — views are much more negative than in earlier online surveys . This dissatisfaction creates fertile ground for reform arguments that move beyond defending ACA subsidies.

Conclusion

Public opinion on the ACA's enhanced subsidies is unsettled. Awareness is extremely low, with only a small fraction of voters even able to identify that the subsidies are scheduled to expire. As a result, most of the electorate is approaching this debate without firm views.

At baseline, voters lean toward allowing the subsidies to expire, though a large share remain undecided. Partisanship shapes much of the divide — Republicans strongly favor expiration, Democrats favor extension, but meaningful crossover exists in both directions. Swing voters tilt toward expiration, but with many still undecided, they remain highly important in shaping the outcome.

Broader dissatisfaction with the healthcare system also colors this debate. Voters express frustration across party and coverage types, and when asked about policy priorities, they gravitate more toward alternative reforms than continued ACA subsidies. This context suggests that opinions on the subsidies are not deeply entrenched, and future developments in the healthcare debate could meaningfully shift voter sentiment.

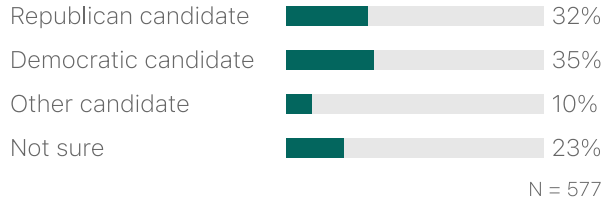


ACA Enhanced Subsidy Expiration

US Registered Voters 09/10/2025-09/12/2025 Filter: Registered Voters

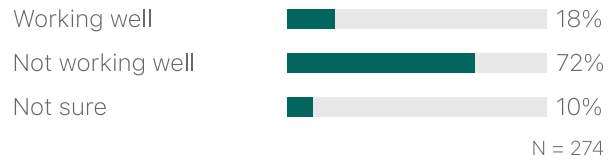
Congressional Election Voting Intent

If the general election for United States Congress were held today, who would you vote for?



Overall Satisfaction with Healthcare

[SPLIT SAMPLE] Overall, would you say the health care system in the United States is working well or not working well for the country as a whole?



Personal Satisfaction with Healthcare

[SPLIT SAMPLE] Overall, would you say the health care system in the United States is working well or not working well for you and your family personally?



Awareness of ACA Changes

In the past few weeks, how much have you seen, read, or heard about potential changes to health insurance purchased through the Affordable Care Act exchanges, sometimes called Obamacare?



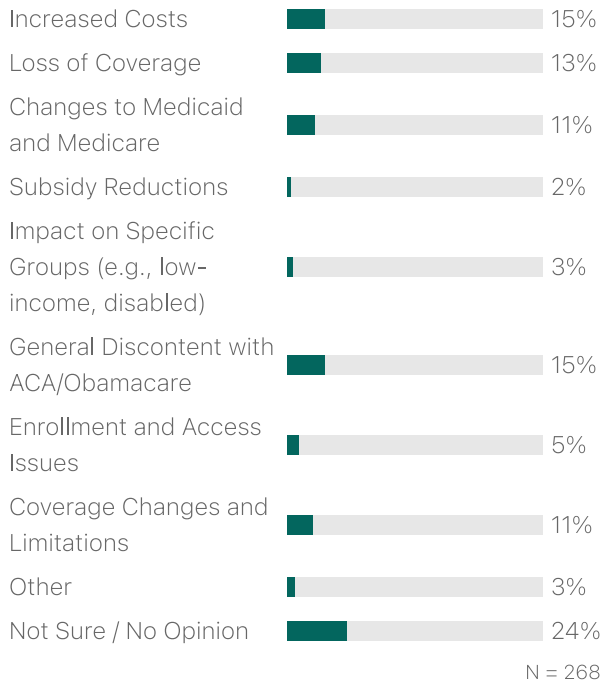


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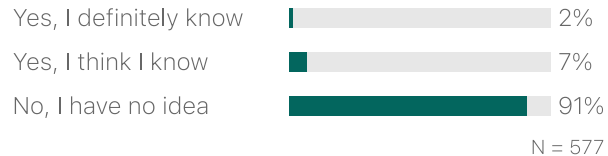
Knowledge on ACA Changes (Coded)

[ASKED OF THOSE WHO HAVE HEARD A LOT OR A LITTLE ABOUT ACA CHANGES] What, specifically, have you seen, read, or heard about potential changes to health insurance purchased through the Affordable Care Act exchanges?



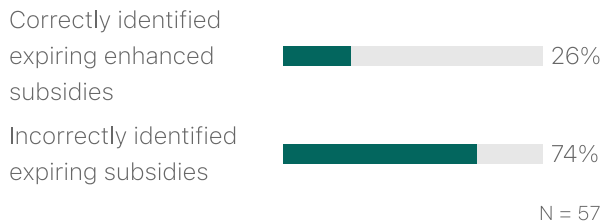
Knowledge of Expiring Subsidies

As you may know, certain subsidies offered to Americans purchasing health insurance through the Affordable Care Act exchanges are set to expire at the end of this year. To the best of your knowledge, do you know which specific subsidies are set to expire?



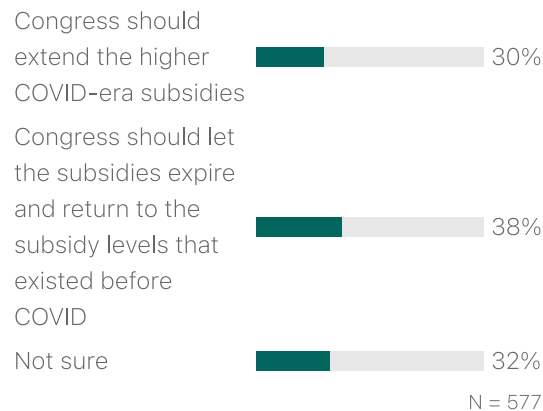
Identifying Specific Expiring Subsidies (Coded)

[ASKED OF THOSE WHO DEFINITELY OR THINK THEY KNOW SPECIFIC EXPIRING SUBSIDIES] To the best of your knowledge, which specific subsidies are set to expire at the end of this year?

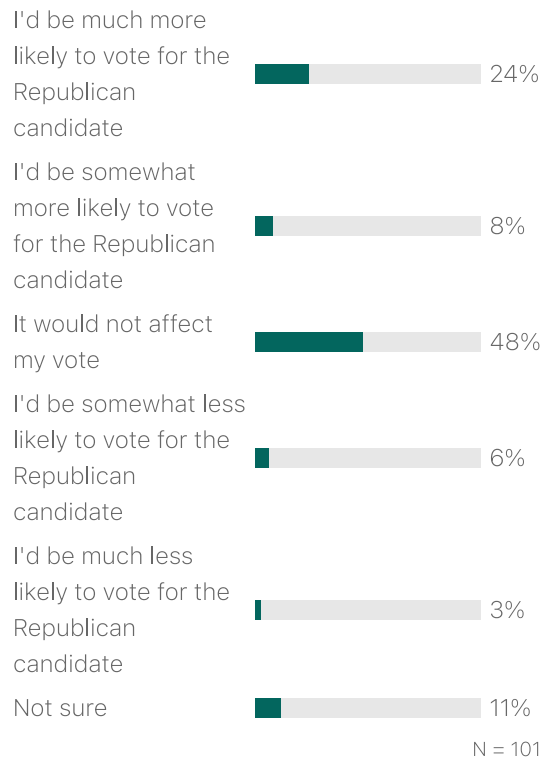


Enhanced Subsidy Expiration

To help Americans get through the COVID pandemic, Congress increased the subsidy amount given to qualified Americans who buy insurance through the Affordable Care Act (ACA), also known as Obamacare. These higher subsidies — passed during the pandemic and later extended by the Biden administration in the Inflation Reduction Act — are scheduled to expire at the end of 2025. Which of the following comes closer to your view?

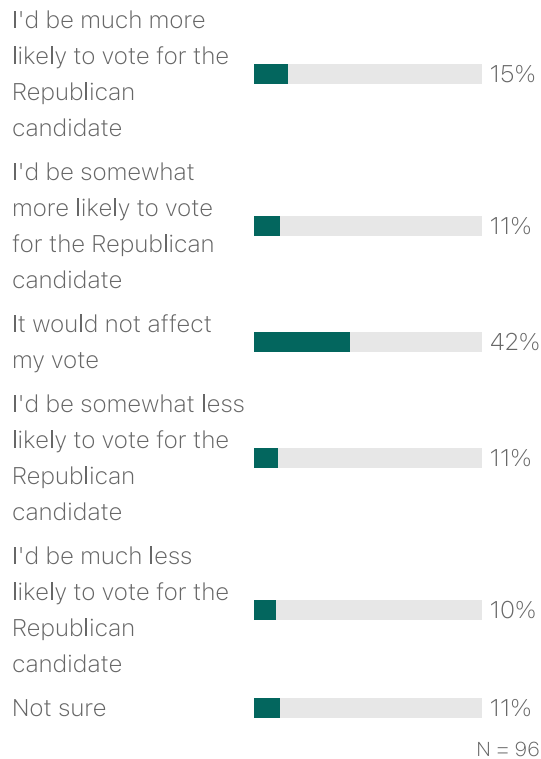
**Vote Impact of ACA Expiration**

[ASKED OF RESPONDENTS VOTING FOR GENERIC CONGRESSIONAL REPUBLICAN CANDIDATE] [SPLIT SAMPLE] You previously said you would vote for the Republican candidate for Congress in your district, if the election were held today. If that Republican candidate was in favor of allowing the enhanced Affordable Care Act subsidies to expire as planned at the end of this year, how would that affect your vote?

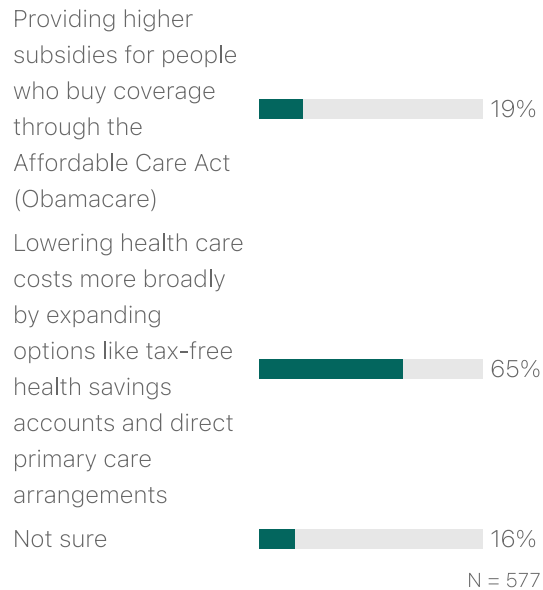


Vote Impact of ACA Extension

[ASKED OF RESPONDENTS VOTING FOR GENERIC CONGRESSIONAL REPUBLICAN CANDIDATE] [SPLIT SAMPLE] You previously said you would vote for the Republican candidate for Congress in your district, if the election were held today. If that Republican candidate was in favor of extending the COVID-era enhanced Affordable Care Act subsidies beyond their planned expiration at the end of this year, how would that affect your vote?

**Health Care Improvement Priorities**

When it comes to improving health care in America, which of the following should be a higher priority for Congress?



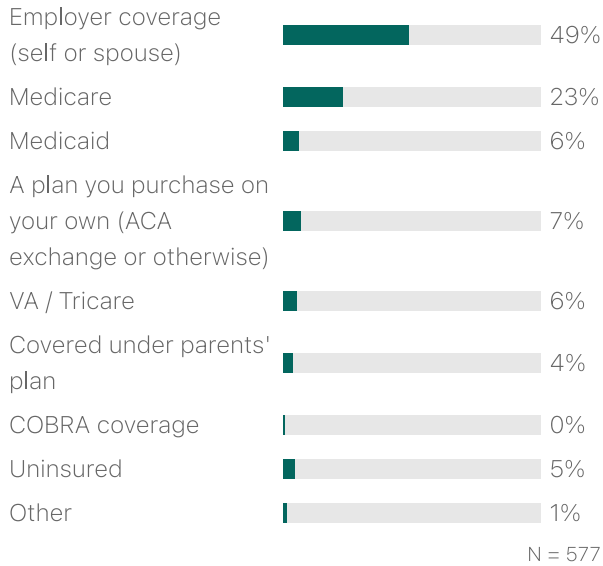


ACA Enhanced Subsidy Expiration

US Registered Voters 09/10/2025-09/12/2025 Filter: Registered Voters

Main Health Insurance Source

Which of the following is your main source of health insurance coverage?



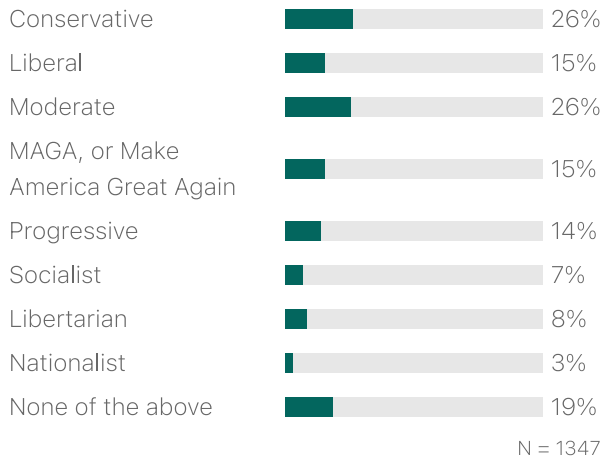
Party ID (Combined)

In politics, as of today, do you consider yourself a...?



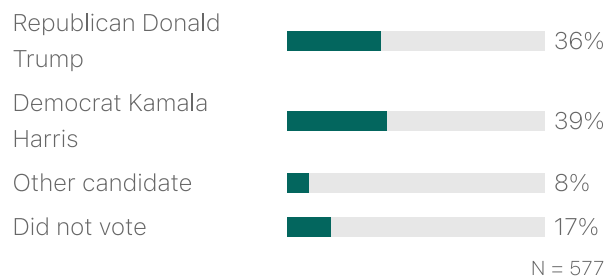
Self-Identified Ideological Group

Which of the following terms would you use to describe your political views?



Voting Record in 2024 Election

To make sure we're speaking to a representative sample of voters, did you vote for Republican Donald Trump or Democrat Kamala Harris in the November 2024 election, or did you not vote?

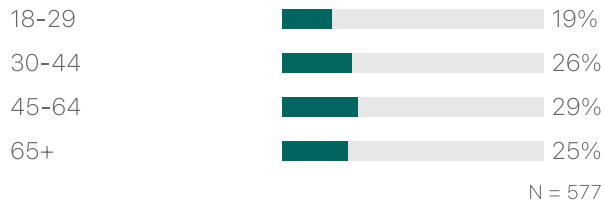




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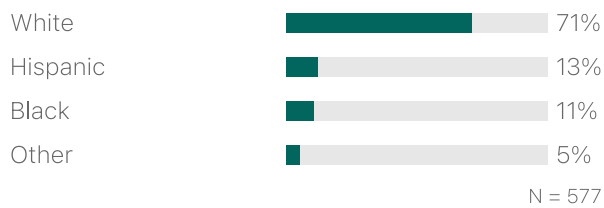
Age



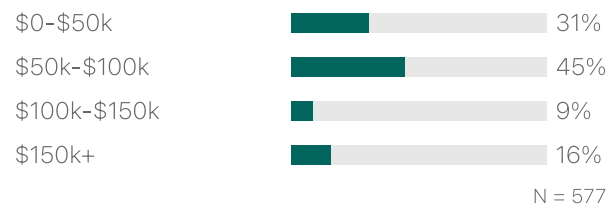
Gender



Race



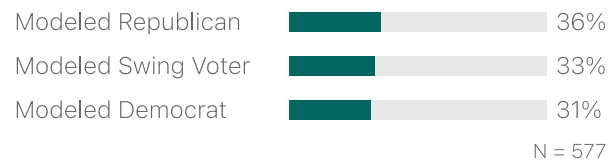
Household Income



Education



Partisanship



Urban Density

