SECOND EDITION · 2026 ANNUAL RESEARCH REPORT

The State of Technology in Value-Based Care

AI Adoption Without Readiness

Findings from a national survey of payers and providers on AI adoption, data confidence, and regulatory readiness

Research conducted by
The Harris Poll · n=200
March 2–13, 2026 · ±6.9pp at 95% CI

Presented By:

reveleer & Mathematica® Progress Together

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Meet the Speakers

AI Governance, Audit Readiness & Defensibility · RISE Webinar · July 16, 2026

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Poll #1 – Which of these best describe your organization's biggest value-based care challenge today?

- Scaling operations as VBC contracts grow
- Too many manual workflows
- Data quality and interoperability
- Keeping up with regulatory requirements

Five Trends Shaping Value-Based Care in 2026

1

Contracts vs. Capacity

VBC contracting is growing faster than the operating model needed to support it.

2

The Infrastructure Paradox

Payers and providers have the technology, but lack the workflows to realize its value.

3

Data Confidence

Organizations are integrating and securing data they struggle to trust.

4

AI Governance & Vendor Trust

AI use is widespread, but confidence in how it's governed lags far behind.

5

Regulatory Readiness

Regulatory pressure is accelerating technology investment, and most organizations remain unprepared.

Technology is deployed. Workflows remain manual.

PROVIDERS

Have right technology infrastructure

+1pp

Platforms too complex for effective use

+17pp

Manual processes dominate VBC workflows

+9pp

PAYERS

Have right technology infrastructure

−1pp

Platforms too complex for effective use

+10pp

Manual processes dominate VBC workflows

+5pp

"Organizations bought the tech they thought value-based care required. Now they're learning that owning the car is not the same as knowing how to drive it."
Ngan MacDonald, Director of Data Innovations, Mathematica

TREND 3 · DATA CONFIDENCE

Organizations are integrating and securing data they struggle to trust.

The 69-Point Gap

98% of payers affirm real-time data are critical for proactive care management

29% name it a top investment priority

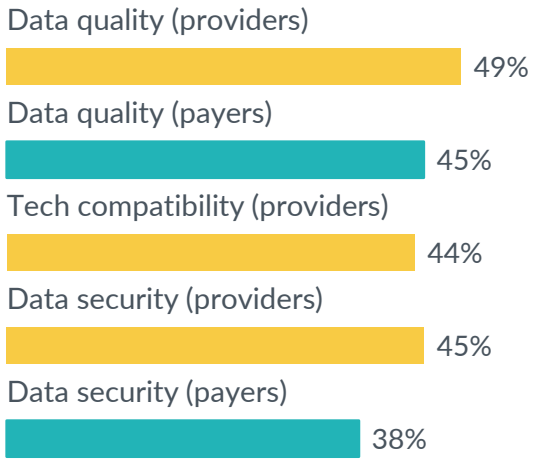
69pp gap

Payer Data Investment Priorities: 2025 vs. 2026

Priority	2025	2026	Change
Data security	49%	42%	New #1
Data quality	56%	37%	▼ –19pp
Real-time data access	34%	29%	▼ –5pp

Data accuracy carries direct financial consequences under RADV. Diagnoses that fail documentation review put RAF scores and quality submissions at audit risk. In 2025, HHS recorded 772 large breaches affecting 138+ million people, the highest annual breach count on record.

Top Integration Barriers: 2026



Poll #2 - How confident are you in your organization's AI governance?

- Very confident—we have documented governance processes
- Somewhat confident—we're building them
- Limited confidence—we're still defining our approach
- Unsure

TREND 4 · AI GOVERNANCE & VENDOR TRUST

AI use is universal. Confidence in how it's governed lags far behind.

Committed to AI as strategic priority

Providers:	38% →	**16%**	▼ −22pp
Payers:	40% →	**23%**	▼ −17pp

Fear of AI hallucinations hinders adoption

Providers:	71% →	**93%**	▲ +22pp
Payers:	77% →	**88%**	▲ +11pp

Vendor Trust Signals: 2026

93%	of organizations say vendors have overpromised on VBC capabilities	▲ *+11pp vs. 2025 (82%)*
35%	have a documented process to detect when AI produces an incorrect output	*New 2026 measure*
68% / 74%	of payers / providers rely on third-party AI vendors	*New 2026 measure*

The Common Thread

Payers and providers have invested in technology, AI, and data faster than in the governance that would make those investments accountable.

01

Governance first.

Only 35% of organizations have a documented process to detect incorrect AI outputs. Governance must keep pace with adoption.

02

Defensibility is the new standard.

Organizations unable to trace AI outputs to clinical evidence face compounding risk as RADV audits expand.

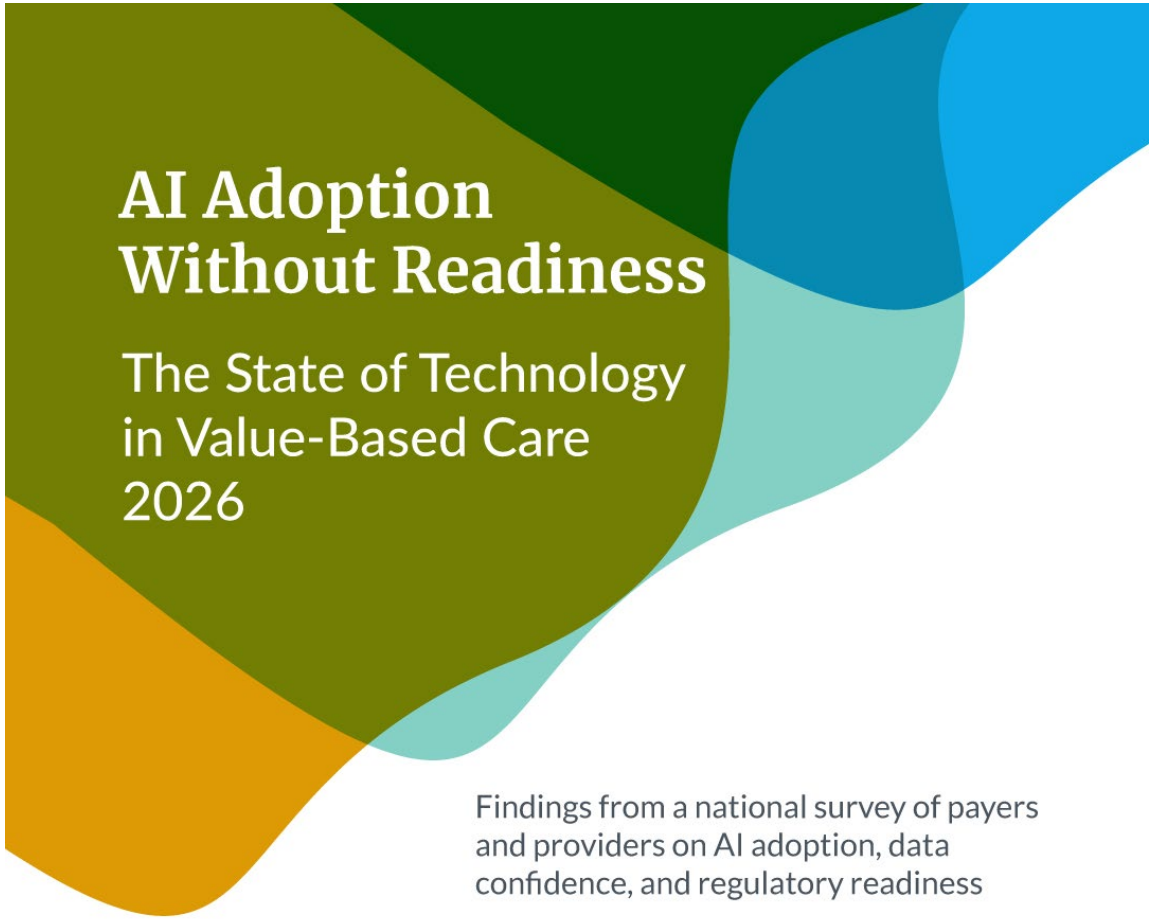
03

Execution over ownership.

The priority is integration depth, workflow consolidation, and governance, the work that makes current deployments perform.

Poll #3 – If CMS increased audit scrutiny tomorrow, how prepared would your organization be?

- Very prepared
- Somewhat prepared
- Somewhat unprepared
- Very unprepared



Download the State of Technology in Value-Based Care Report 2026

reveleer.com/vbc-report26

Questions?

We'd love to discuss the findings with you.

THANK YOU

While we have selected our speakers based on their general knowledge and experience with the subject matter of the program, neither RISE nor the speakers are providing legal or compliance advice to you or your organization. You should consult your organization's legal or compliance advisor(s) regarding your unique circumstances. Any examples discussed in the program are hypothetical only. The presence of vendors or speakers at RISE events does not constitute an endorsement of the vendor or speaker or their views, products or services.

Appendix

About This Research

About the Series

The State of Technology in Value-Based Care is an annual research series commissioned by Reveleer, with independent analysis by Mathematica, tracking how payer and provider organizations use and govern technology across risk adjustment, quality improvement, data management, and AI-enabled workflows.

The 2025 edition found broad alignment on the importance of technology in value-based care but gaps in execution that threatened to stall progress. This 2026 report builds on that baseline to show where organizational posture has improved, where it has deteriorated, and where new risks have emerged.

Methodology

Conducted by: The Harris Poll

Sample: n=200 senior decision-makers

Respondents: Director level or above

Fielded: March 2–13, 2026

Margin of error: ±6.9pp at 95% CI

Payers: n=100

Providers: n=100

Analysis: Mathematica (vendor-neutral)

TREND 1 · CONTRACTS VS. CAPACITY

VBC contracting is growing faster than the operating model can support.

VBC Contract Growth: Reported Past 12 Months

	2025	2026	Change
Payers	92%	100%	▲ +8pp
Providers	81%	95%	▲ +14pp

Alignment on VBC Goals: Year-Over-Year

	2025	2026	Change
Payers	97%	95%	▼ −2pp
Providers	100%	88%	▼ −12pp

Average share of payer business tied to VBC fell from 55.1% to 47.5%, even as contract volume grew, a signal that execution is lagging expansion.

Expect More VBC Contracts Ahead

99%

of payers

43% anticipate significant expansion

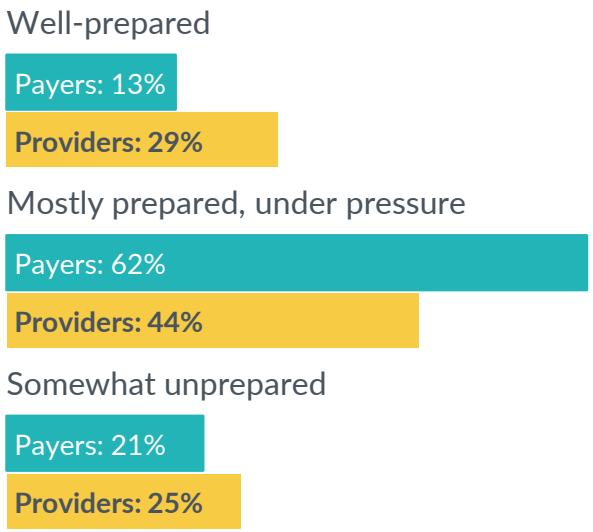
95%

of providers reported growth

TREND 5 · REGULATORY READINESS

Regulatory pressure is accelerating investment. Most organizations remain unprepared.

CMS Preparedness Self-Assessment: Payers vs. Providers, 2026



RADV Audit Context

CMS announced annual RADV audits for all eligible Medicare Advantage organizations on a quarterly cadence. Payment Year 2020 audits launched in February 2026 across approximately 550 contracts.

Diagnoses that are unsupported by records create financial exposure. Organizations unable to trace AI outputs to clinical documentation face compounding risk.

Regulatory Impact vs. Preparedness: 2026

PAYERS

52% significant or transformational impact

13% well-prepared

PROVIDERS

64% significant or transformational impact

29% well-prepared