Virtual Care Market Landscape

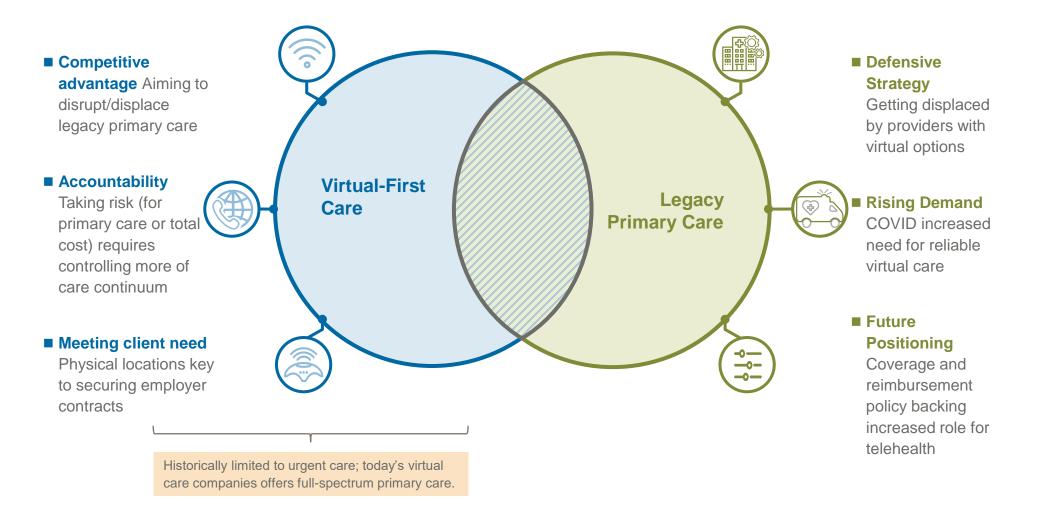
February 2022



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Virtual-first and legacy primary care converging

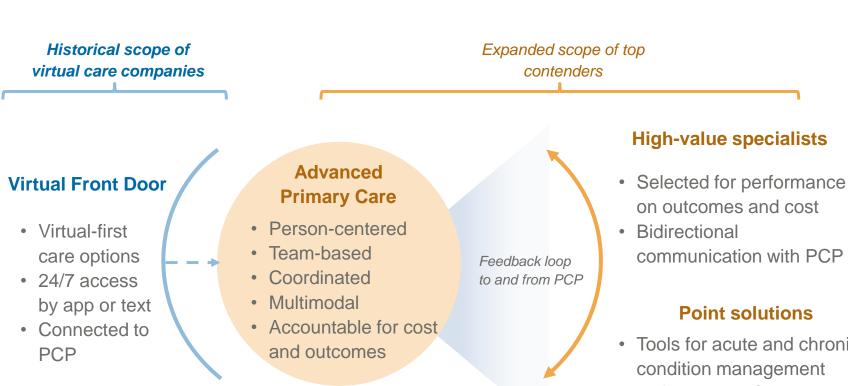
COVID + demand for telehealth driving landgrab for digital + physical assets



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Comprehensiveness creates opportunity to test virtual-first accountable care

Top contenders could be full-service accountable care solution, integrating across assets and modalities



Accountable Care Ecosystem

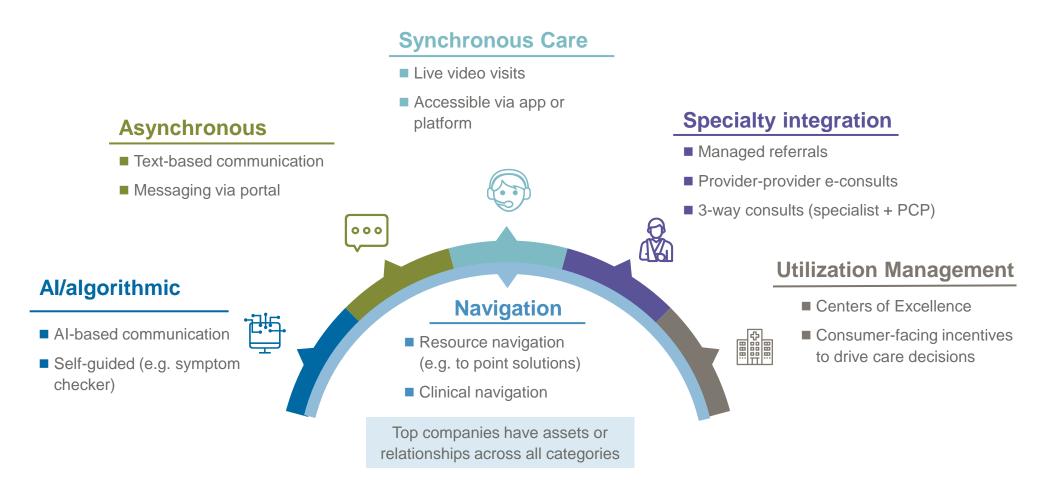
- Tools for acute and chronic
- Referred by PCP
- Communicate progress back to PCP

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Virtual care companies increasingly full-spectrum

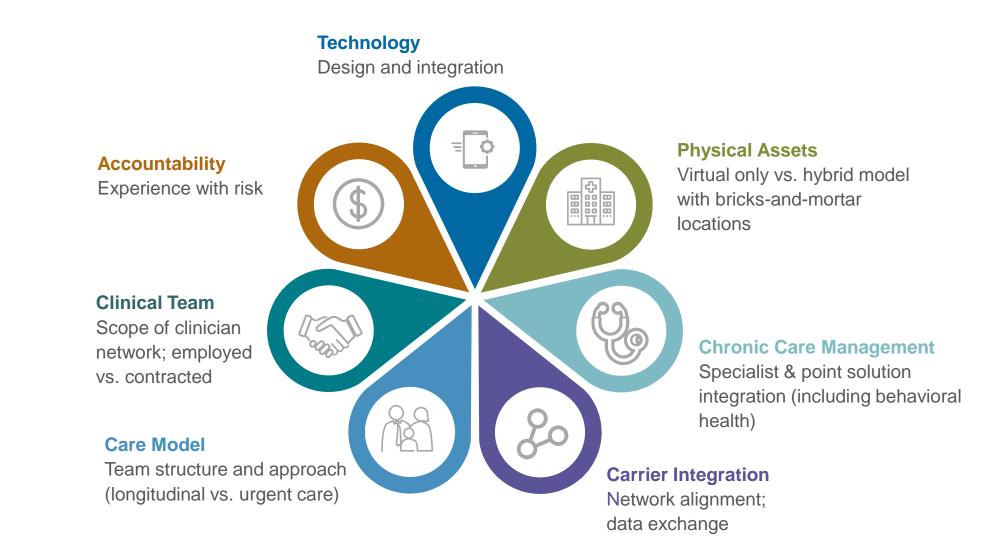
Assets both up and down intensity spectrum



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Among full-stack companies, some differentiators emerging



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