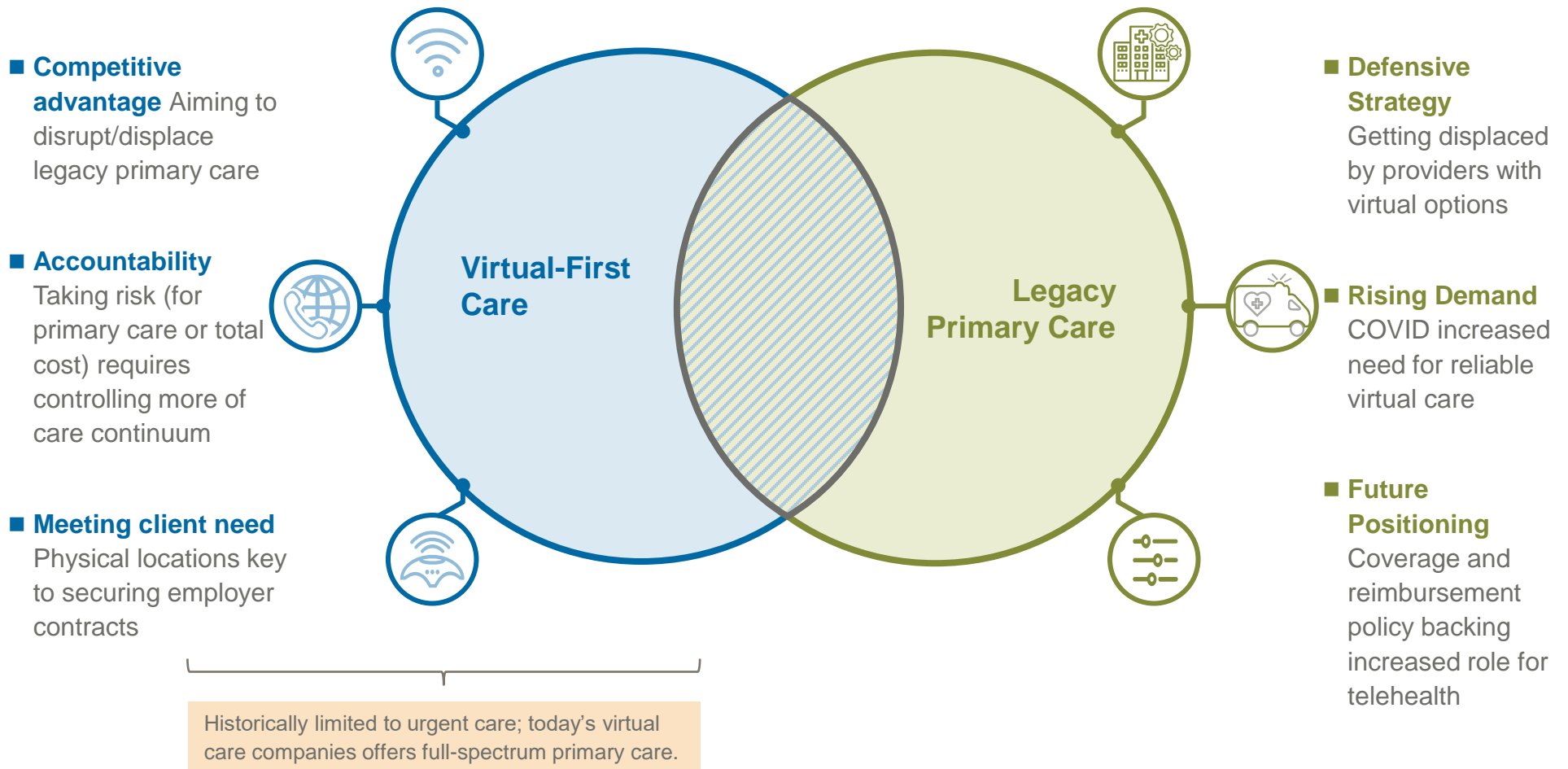

Virtual Care Market Landscape

February 2022

Virtual-first and legacy primary care converging

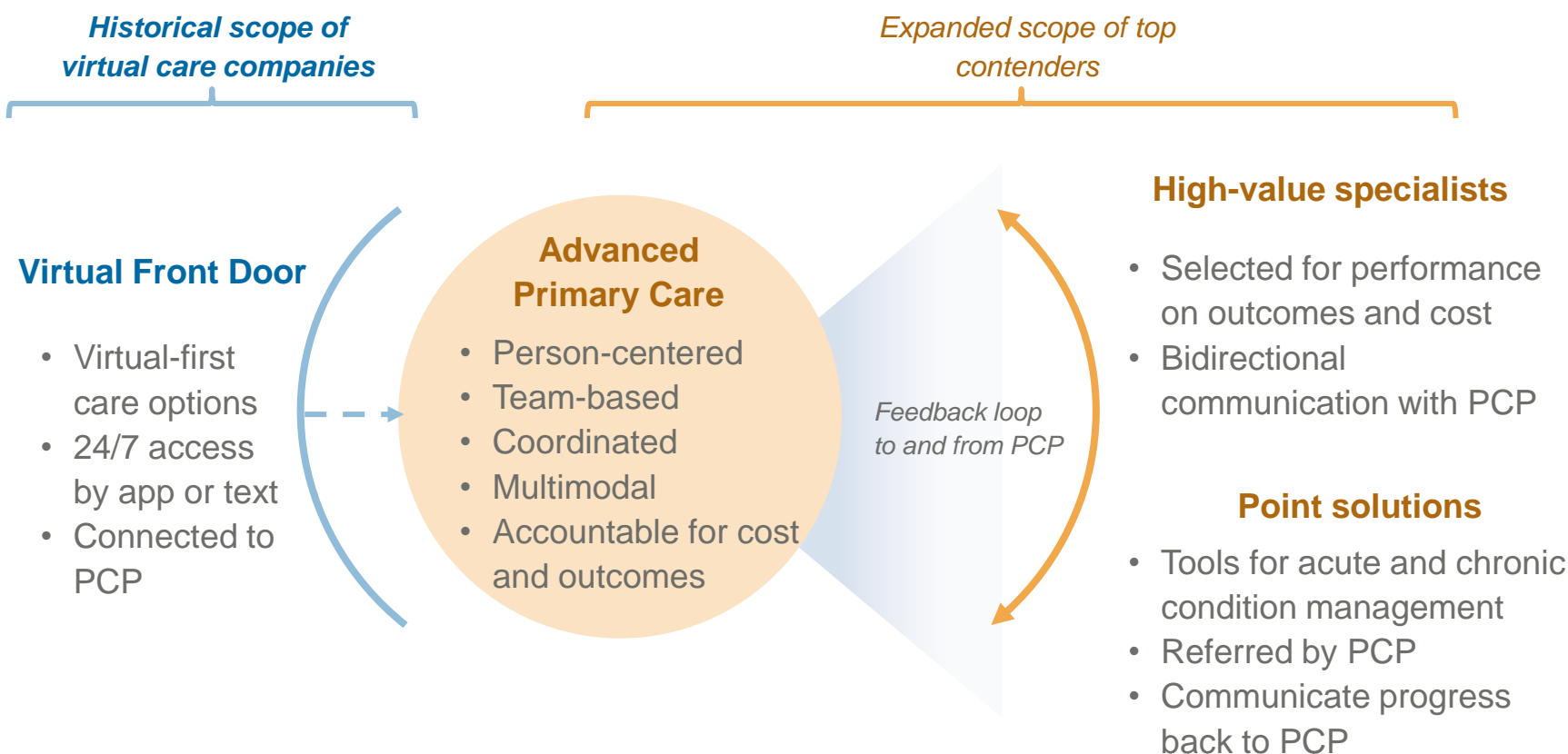
COVID + demand for telehealth driving landgrab for digital + physical assets



Comprehensiveness creates opportunity to test virtual-first accountable care

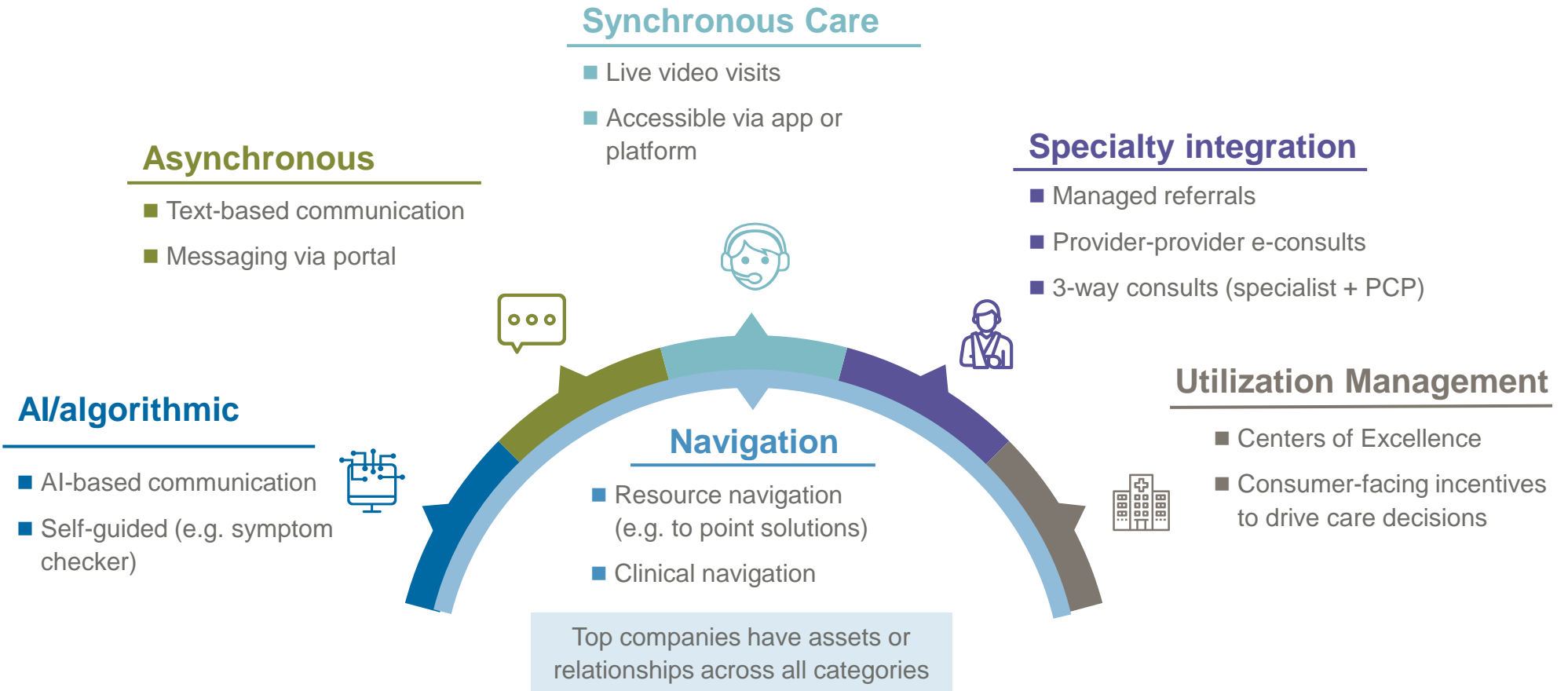
Top contenders could be full-service accountable care solution, integrating across assets and modalities

Accountable Care Ecosystem



Virtual care companies increasingly full-spectrum

Assets both up and down intensity spectrum



Among full-stack companies, some differentiators emerging

