

Virtual Care Platforms (Non EMR based)

Expanding Healthcare Access Via Digital Care Delivery

2025 CONSTELLATION SHORTLIST

The Constellation ShortList™ presents vendors in different categories of the market relevant to early adopters. In addition, products included in this document meet the threshold criteria for this category as determined by Constellation Research. This Constellation ShortList of vendors for a market category is compiled through conversations with early adopter clients, independent analysis and briefings with vendors and partners.

ABOUT THIS SHORTLIST

Telehealth has been around for years, and it was a competitive advantage when an organization offered the service. Now it's standard for patient care. This trend leads to the emergence of virtual care technology to enable better and more effective care. Constellation forecasts a \$65.7 billion market by 2030 up from \$13.4 billion in 2024.

The most notable benefit for patients offered by virtual care is convenience. Patients and doctors will not have to travel to and from a hospital or clinic to seek or provide care. Instead, the virtual visits empower people to consult with their providers from the comfort of their own homes. New AI technologies will allow for automated agents, virtual "telly's", and real-time translation.

The trend in healthcare is to move patient care out of the inpatient setting toward ambulatory as much as possible, resulting in the virtual technology platform as a critical component to achieving that objective.

12 SOLUTIONS TO KNOW

Constellation evaluates more than 25 solutions categorized in this market. This Constellation ShortList is determined by client inquiries, partner conversations, customer references, vendor selection projects, market share, and internal research.

- AMAZON (ONE MEDICAL)
- AMWELL
- CAREGILITY
- DOXY.ME
- EVISIT
- HEALTHTAP
- INCLUDED HEALTH
- MDLIVE
- PLUSHCARE
- TELADOC
- TRANSCARENT
- VIRTUWELL

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To learn more about Constellation Research Shortlists visit: www.constellationr.com/ShortList



THRESHOLD CRITERIA

Constellation considers the following criteria for these solutions:

- Electronic medical record system integration
- Clinical documentation
- Insurance verification, if applicable
- Hospital operation integration
- Ability to operate in low-bandwidth geographical areas
- Ease of scheduling
- Virtual waiting room
- E-prescribing
- Revenue cycle functionalities
- Secure platform meeting healthcare industry requirements
- API capabilities
- Easy payment solution and integration with health system's financial platform
- Specialty telehealth solution capabilities
- Mobile app on iOS/Android
- Patient portal
- Real-time translation
- Virtual agents

ABOUT CONSTELLATION RESEARCH

As an award-winning Silicon Valley-based strategic advisory and futurist analyst firm, Constellation Research serves leaders and organizations navigating the challenges of digital strategy, business-model disruption and digital transformation. Constellation works closely with solution providers, partners, C-suite executives, board of directors, and its Constellation Executive Network of buy-side leaders to lead the way in research coverage and advise clients how to achieve valuable business results.

FREQUENCY OF EVALUATION

Each Constellation ShortList is updated at least once per year. Updates may occur after six months if deemed necessary.

EVALUATION SERVICES

Constellation clients can work with the analyst and the research team to conduct a more thorough discussion of this ShortList. Constellation can also provide guidance in vendor selection and contract negotiation.

BUSINESS THEMES



Next Gen Customer Experience



Tech Optimization



R "Ray" Wang Founder & Principal Analyst

R "Ray" Wang provides insight into how disruptive technologies and new business models—such as digital transformation— impact brands, enterprises and organizations. He also focuses on harnessing innovation, creating next-generation business and IT leadership, and applying the new rules of business. Wang has held executive roles in product, marketing, strategy and consulting at companies including Forrester Research, Oracle, PeopleSoft, Deloitte, Ernst & Young and Johns Hopkins Hospital.

