中国平安
金融·科技

中国平安保险(集团)股份有限公司
Ping An Insurance (Group) Company of China, Ltd.

(於中華人民共和國註冊成立之股份有限公司)

（股份代號：2318）

海外監管公告

本公告乃根據《香港聯合交易所有限公司證券上市規則》第13.10B條而作出。

茲載列中國平安保險（集團）股份有限公司在上海證券交易所網站刊登的「中國平安保險（集團）股份有限公司關於披露"中國平安2020投資者開放日"相關報告的公告」，僅供參閱。

承董事會命
盛瑞生
聯席公司秘書

中國深圳，2020年9月22日

於本公告日期，本公司的執行董事為馬明哲、謝永林、陳心穎、姚波及蔡方方；非執行董事為謝吉人、楊小平及王勇健；獨立非執行董事為葛明、歐陽輝、伍成業、儲一昀及劉宏。

证券代码：601318　　证券简称：中国平安　　公告编号：临 2020-064

中国平安保险（集团）股份有限公司
关于披露"中国平安 2020 投资者开放日"相关报告的公告

中国平安保险（集团）股份有限公司（以下简称"本公司"）董事会及全体董事保证公告内容不存在任何虚假记载、误导性陈述或者重大遗漏，并对公告内容的真实性、准确性和完整性承担个别及连带责任。

本公司定于 2020 年 9 月 22 日（星期二）举行"中国平安 2020 投资者开放日 — 走进平安集团医疗健康生态圈"活动，并就平安医疗生态圈、平安好医生、平安智慧医疗等主题作出报告。

上述报告的具体内容请见本公司于同日在上海证券交易所网站（www.sse.com.cn）披露的本公告附件。

特此公告。

中国平安保险（集团）股份有限公司董事会

2020 年 9 月 22 日

Ping An Group Investor Day
Healthcare Ecosystem

平安集团投资者开放日

医疗生态圈

2020.9.22

01

Ping An Group Healthcare Ecosystem
平安集团医疗生态圈

Huge Market Potential

市场潜力巨大

Significant healthcare market potential
- Huge market size: Expected to grow from RMB 6trn in 2019 to RMB 16trn in 2030
- Significant demands from key stakeholders
- Supportive regulatory environment

医疗健康市场潜力巨大
- 市场规模巨大：预计2019年到2030年将从6万亿增至16万亿人民币
- 医疗生态圈各方需求显著
- 有利的政策监管环境

Ping An Group Healthcare ecosystem has significant synergies
- Patient + Provider + Payor synergies
- Government Access + Technology synergies
- Insurance + Healthcare synergies

平安集团医疗生态圈战略协同显著
- 用户+医疗服务提供方+支付方
- 政府+科技
- 保险+医疗健康

PAG is a leading healthcare player in China, with unique advantages compared with insurance and internet companies
- Largest online healthcare user portal
- One of largest offline network of medical providers
- Leading healthcare technology capabilities

平安是中国领先的医疗健康企业，与保险公司和互联网公司相比竞争优势巨大
- 最大的互联网医疗流量入口
- 领先的线下医疗服务提供方网络
- 领先的医疗科技水平

Market: Driven by ageing population, consumer affluence & policy support

受人口老龄化、居民收入增长和政策鼓励驱动的庞大市场

Ageing Population
人口老龄化

12.6%

People of >65 years old[1]
65岁以上人口占比

Consumer Affluence
居民收入的增长

9%

Expected YoY growth of disposable income
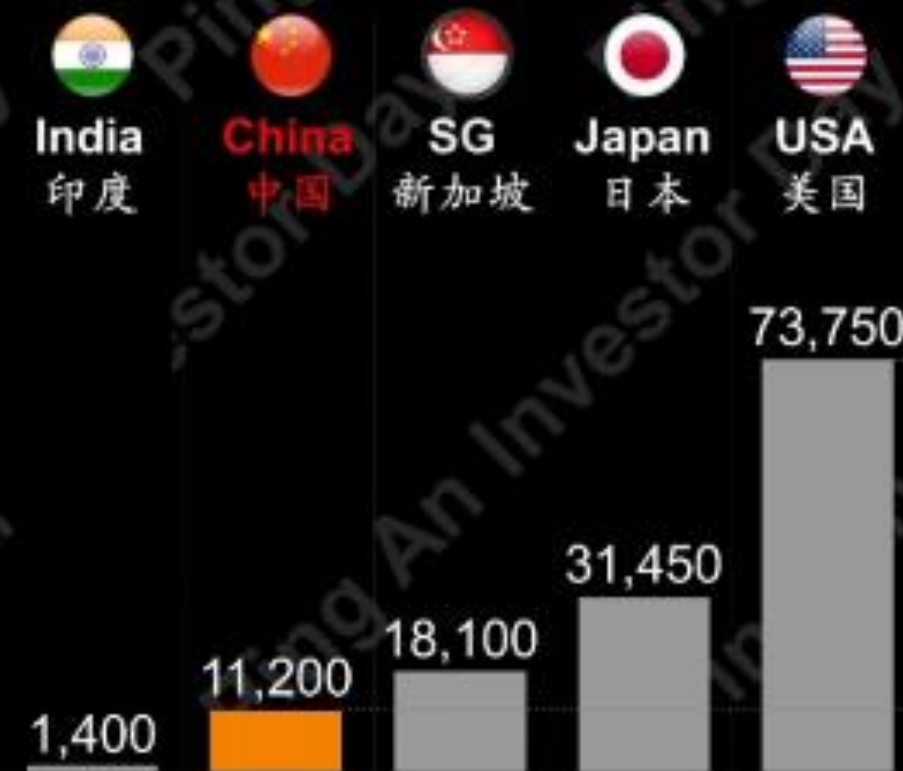未来5年人均可支配收入年增长

Policy Support
政策鼓励

"Healthy China 2030"

As national strategy
"健康中国2030"已上升为国家战略

Healthcare spending per capita (RMB, 2018)
人均医疗健康支出 (人民币，2018)

India 印度 — 1,400
China 中国 — 11,200
SG 新加坡 — 18,100
Japan 日本 — 31,450
USA 美国 — 73,750

~7倍
~7x

China total healthcare expenditure (RMB)
中国医疗健康总支出（人民币）

~6 trn 万亿 — 2019
~16 trn 万亿 — 2030E

Healthcare ecosystem stakeholders face significant pain points

医疗生态中各方的痛点凸显

Government
政府

Patients
居民

Providers
机构

Physicians
医生

Payors
支付方

Government: Significant task to achieve China 2030 Health aspiration

政府需要协助来实现健康中国2030的愿景

Goals and Aspiration
目标及愿景

健康中国 2030

- Life expectancy reaching 79 by 2030
  2030年人均预期寿命达到79岁
- Healthcare sector to be economic pillar
  健康产业成为国民经济支柱性产业
- Improve healthcare service mechanism
  促进健康的制度体系更加完善

Market potential 潜在目标市场

Providers 机构 *(hospitals / clinics医院及诊所)*
~1mn ~100万

Physicians 医生
3.8mn doctors 380万医生
4.4mn nurses 440万护士

Pharma 医药
180k medicine SKU 18万种药品

Diseases 疾病
88% deaths from chronic diseases
88%死亡由于慢性病

Lack of systematic and efficient supervision
缺乏系统化、高效监管

Large shortage of general practitioners
全科医生缺口大

Severe over-prescriptions / unnecessary medications
过度治疗问题严重

Low awareness of diseases
疾病知晓率低

Patients: Inconvenient and expensive medical services

居民：看病难、看病贵

~1Bn sub-health[1] population	**Long waiting time** 非诊时间长
~10亿 亚健康[1]人群	
400Mn+ patients with chronic diseases	
4亿+ 慢病患者	**Expensive treatment** 医院看病贵
4Mn patients with critical illnesses[2]	
400万 重疾患者[2]	
~250Mn people >60 years old	**Inconvenience in Social Health Insurance** 医保便利差
~2.5亿 60岁以上老人	

3hours 3小时	**Waiting time** 就医等待	**5min** 5分钟	**Actual consultation** 实际就诊
2-3x 2-3倍	**Retail prices higher than ex-factory price (medicine)** 药品终端价格高于出厂价	**60%**	**Non-necessary medications rate** 非必要用药比例高达
Online 线上	**Difficult to settle Social Health Insurance payment online** 医保线上支付难		

1. Sub-healthy states refer to non-disease physical or mental disorders such as mild cervical pain and insomnia 亚健康指代非疾病的身体活心理不适，例如轻微颈椎疼痛和失眠; 2. e.g. cancer 以癌症为例

医生：医护人员不足，且基层医疗水平专业性欠佳

Number of General Practitioners as % total doctors
全科医生占医生总数

General practitioners
全科医生

🇨🇳 12%

🇺🇸 30%
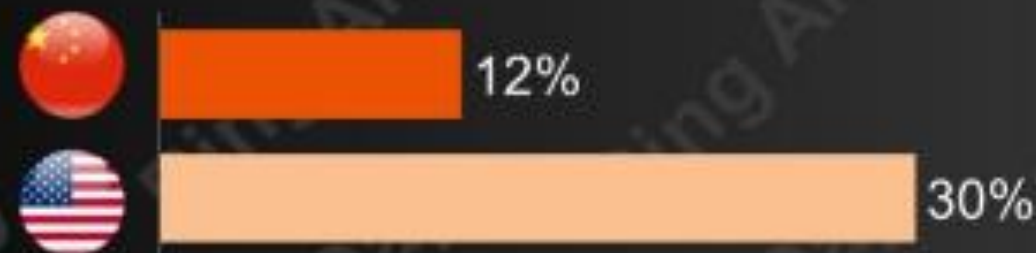
Shortage of 700K
缺口70万[1]

Doctor to nurse ratio
医生与护士人数比例

Nursing staff
护理人员

🇨🇳 1:1

🇺🇸 1:4
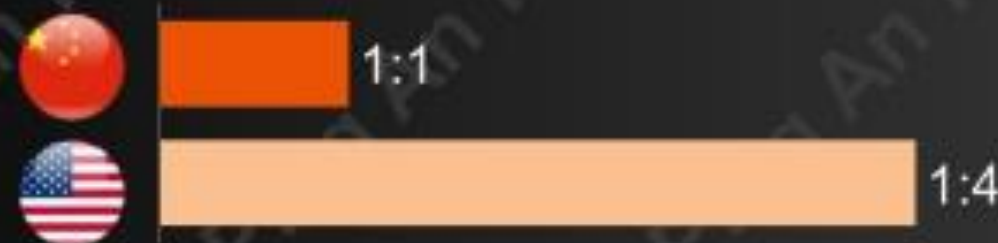
Shortage of 10Mn
缺口1000万[2]

Work Pressure
工作压力大

>50hrs

70% doctors working hours per week
70%医生每周工作小时

Medical Quality
医疗水平欠佳

<50%

Standardized treatment rate of primary healthcare institutions
基层医疗机构规范治疗率

1. The total number of Chinese doctors is 3.8 million, with general practitioners accounting for 12%. According to the proportion of general practitioners in the US, the shortage of general practitioners is 700K 中国医生总数380万，全科医生占比12%，按照美国全科医生占比30%，当前全科医生缺口70万；2. The total number of Chinese doctors is 3.8 million, and the ratio of doctors to nurses is 1:1. According to the ratio of doctors to nurses in the US, there is a shortage of 10 million nursing staff 中国医生人数380万、护士410万（医护比1：1），按照美国医护比例1：4，当前护理人员缺口1000万

Payors: Social health insurance under pressure and low commercial insurance proportion

支付方：医保支付承压，商保覆盖较低

Medical expenditure structure[1] (trn)
医疗支出结构 (万亿)

4.1
0.2 (6%)
2.1 (50%)
1.8 (44%)

0.9
0.02 (2%)
0.3 (33%)
0.6 (65%)

2009

2019

Commercial Insurance 商保支出   Social Health Insurance 医保支出
Individual Costs 个人支出

Mismatch between income and payment growth
医保收支增速不匹配

10%
2019 Social Health Insurance **income increased 10%**
2019年医保收入增长10%

12%
2019 Social Health Insurance **payment increased 12%**
2019年医保支出增长12%

Commercial Insurance covered
商保支出

6% medical costs **in China**
占中国医疗费用支出仅6%

vs.

33% medical costs **in USA**
占美国医疗费用支出33%

1. Government subsidies excluded 不包括政府补贴

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监管：国家出台很多有利的政策支持，特别是在新冠疫情爆发之后

Online

Internet + Healthcare
促进互联网+医疗

- **Allow internet healthcare to be eligible for reimbursement from Social Health Insurance (SHI)** and as an important component of tiered diagnosis and treatment 允许互联网医疗接入医保并作为分级诊疗制度的一大重要组成
- Promote online services including **telemedicine and online appointment** 推动远程医疗、预约诊疗等服务
- Encourage **data connection** between internet hospitals and offline institutions 推进互联网医院与各级医疗机构的数据对接

Provider

Hierarchical diagnosis and treatment
促进分级诊疗

- Encourage **non-governmental capital** to participate the **development of providers** 鼓励社会资本积极参与医疗机构发展
- Continue **system reform** towards **tiered diagnosis and treatment** 持续深化医疗制度改革，进一步促进分级诊疗
  （Divert patients to corresponding types of medical institutions based on the severity level of illness to avoid overloading best quality hospitals 根据病情轻重缓急进行分级，避免三级医院超负荷）

Insurance

Healthcare Management
促进健康管理

- Uplift the cap of **health management cost** of net premium income from **10% to 20%** 将健康管理服务成本占净保费上限从10%提高至20%

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- 用户+医疗服务提供方+支付方
- 政府+科技
- 保险+医疗健康

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We have a long history of 20+ years in healthcare sector

平安在医疗健康领域已有20+年经验

Phase 3 阶段3
Healthcare ecosystem
医疗生态

2018	2018	2019	2019
平安医疗科技	平安智慧医疗	平安医院管理团队	户田研究院[1]
Healthcare Technology	Smart Healthcare	Ping An Hospital Mgmt.	Toda Bio Research[1]

Phase 2 阶段2
Healthcare services
医疗服务

2012	2017	2014	2016
平安创投	平安领航基金	平安好医生	平安医保科技
Ping An Ventures	Voyager Global Fund	Ping An Good Doctor	Health Konnect

Phase 1 阶段1
Insurance
保险

1996	2002	2004	2005
平安海外控股	中国平安人寿保险	平安养老保险	平安健康保险
Overseas Holdings	Life Insurance	Annuity Insurance	Health Insurance

1. Ping An Group's life science research institute in Japan 户田研究院是平安集团在日本的生命科学研究院

横向打通 Horizontal

- Patient: Grasp patient flow and influence their behaviours
  用户端：抓住用户流量，决策医疗健康行为
- Payor: Manage medical institutions and influence users
  支付端：长臂管理机构，并影响用户
- Providers: Empower providers, generate product & service profit
  服务方：赋能服务方，获取产品服务利润

纵向打通 Vertical

- Serve government.: Leveraging core resources of hospitals, doctors, and medicine
  服务政府：撬动医院、医生、医药核心资源
- Technology: Empowers ecosystem and establishes a competitive moat
  科技赋能：赋能生态圈各成员，建立竞争壁垒

主业协同 Insurance+Health

- Customer Acquisition: 15-20% new retail financial services customer from healthcare ecosystem
  助力获客：15-20%新增金融客户来自医疗生态圈
- Improve Quality: Higher # of contracts and AUM per customer
  提高粘性：医疗生态圈金融客户客均合同数更高
- Customer value: Higher value from financial services + health customers
  提高客均价值：金融+医疗客户价值更高

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Ecosystem: Empower key stakeholders through government access and technology

医疗生态圈协同：服务政府撬动核心资源，建立科技壁垒

Government 政府

Provide best-in-class solutions 提供一流的解决方案

Synergy 协同

Key Service Providers 主要服务提供方

Patient 用户

Online 线上 + **Offline 线下**

Payor 支付

Technology 科技

One of the global largest health-tech databases 全球最大的医疗科技数据库之一

- **Government**: Leverage government access to influence hospitals, doctors, and medicine
  政府端：服务政府，来撬动医院、医生、医药核心资源

- **Technology**: Empower ecosystem and establishes competition barriers
  科技端：科技赋能生态圈各成员，建立竞争壁垒

Insurance + Healthcare: Combination of personalized service and protection

保险+健康：有场景、有温度、有服务的保险

Propel financial customer acquisiiton
助力金融主业获客

Number of financial customers 金融客户数（百万 mn）

- 🟧 使用医疗服务的客户
  Customers with PA healthcare service
- ⬜ 不使用医疗服务的客户
  Customers w/o PA healthcare service

	157	180	200	210
🟧	54%	56%	59%	60%
⬜	46%	44%	41%	40%
	2017	2018	2019	2020H1

126mn
Customers 客户

15%-20% New customers acquired from healthcare ecosystem each year
每年新增金融客户来自医疗生态圈

Increase value of financial customers
来自医疗生态圈的金融客户带来更高价值

- 🟧 使用医疗服务的客户
  Customers with PA healthcare service
- ⬜ 不使用医疗服务的客户
  Customers with PA healthcare service

3.1 Vs. 2.0

No. of financial contracts per customer
客均金融合同数

10k Vs. 5.6k

AUM per customer (RMB)
客均AUM （人民币）

成绩斐然

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Government: Provide best-in-class solutions for government

政府：为政府提供一流的解决方案

30 Provinces Covered
省份覆盖

90 Cities Covered
城市落地

Enable Providers
管机构

Enable Doctors
管医生

Enable Disease Control
管疾病

Enable Pharmaceuticals
管药品

5% Potential Hospital Cost Saving 潜在医院成本节约

60%+ Clinical Service Quality Improvement
临床医疗质量提升

95%+ Prediction Accuracy of 42 Diseases
42种疾病预测准确率

130 Traditional Chinese Medicine Production Standard
中药生产标准

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平安好医生
PAGD

平安智慧医疗
Smart Healthcare

110k Partnered Pharmacies 合作药店数 11万	**1,800** In-house Medical Team 自建医疗团队 #1 in China 全国第一	**~10k** Contractual Experts 签约专家 近万名

~20k Institutions Covered 机构覆盖数 近2万	**450k** Doctors Served 服务医生数 45万	**1,000+** Global Hospital Network 全球合作 医院网络

Payors: Leading in both commercial insurance and social health insurance

支付方：领先的商保公司及医保服务商

Commercial Insurance 商保

Social Health Insurance 医保

Life Insurance 寿险

~65mn
~6.5千万

Life Insurance Customers[1]
人寿保险客户[1]

Health Insurance 健康险

No.1
第一

Rank of Health Insurance
Premium in China
健康险保费规模国内排名

Service covered 服务覆盖

~200

Cities Covered
服务医保城市

Subsystem covered 子系统覆盖

~20

Wins out of 73 biding
subsystems
开标的73个子系统中标数量

No.1
第一

Ranking among subsystem providers
中标子系统数量在供应商中排名

1. Effective policy holders 有效保单的投保人

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Technology: We developed one of the largest medical databases in the world

科技：全球最大的医疗数据库之一

World 2nd
全球第二

Largest Health-tech Patents Application
医疗科技专利申请数

6

World Champions of Medical Imaging[1]
6项医疗影像国际竞赛第一

33mn
3.3千万

Medical Literatures
医学文献

36mn
3.6千万

Medical Relationships
医学关系

30,000+

Disease Covered
疾病覆盖数

1bn
10亿条

Medical Records
就诊数据

300mn
3亿次

Service Usage
医疗科技调用次数

180K
18万

Drug Instructions
药品说明书

1. Intelligent reading of pulmonary nodule；stomach cancer, fundus diagram analysis, lung cancer detection and segmentation, endoscopic image quality control, and panthologic myopia 肺结节智能读片，胃癌、眼底图分析，肺癌检测与分割，内镜影像质控，病理性近视

回顾：关键点

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02

Ping An Good Doctor
平安好医生

Weihao Fang

方蔚豪

Ping An Healthcare and Technology Company Limited
Acting Chairman and CEO
平安健康医疗科技有限公司 临时董事会主席、首席执行官

PAGD is largest internet healthcare entry portal in China: 346mn registered users, 830k daily queries, 67mn MAU

PAGD enjoys a synergistic role within Ping An Groups' broader Healthcare Ecosystem: customer resources (210mn financial service customers), channel resources (4mn+ corporate clients), and healthcare technology

We continue to deepen bridge between patients and doctors with strategic upgrade launched in mid 2020: More diversified channels, more innovative services, and more enhanced capabilities in doctor and offline network

平安好医生是中国最大的互联网医疗流量入口：3.46亿注册用户，83万日咨询量，6,700万月活

平安好医生具有与平安集团医疗生态圈强大的协同效应：平安集团生态圈为平安好医生提供客户资源（2.1亿金融用户）、渠道资源（超400万企业客户）、医疗科技支持

我们于2020年中开始全面战略升级，进一步打造专业的医患沟通桥梁：更多元化的渠道，更创新的服务，更深入的医生网络、线下服务网络

PAGD is the leading internet healthcare service provider in China

平安好医生是中国领先的互联网医疗服务平台

Complete user scenarios
完善用户场景

Accumulate traffic and data
流量及数据积累

Sustainable revenue growth model
可持续收入增长模式

Access to quality online healthcare
高质量在线医疗服务

7 x 24

100mn+ registered users 注册用户 突破**1亿**

Launched **"Private Doctor"** 发布产品 "私家医生"

HK$100bn+ market cap 市值突破 千亿港元

Establishment 成立

Listed in Hong Kong Stock Exchange 港交所上市

300mn+ registered users 注册用户 突破**3亿**

Launched **strategic upgrade** 进行**战略升级**

| 2014.08 | 2016.12 | 2018.05 | 2019.08 | 2019.09 | 2020.04 | **Mid 2020** |

We aspire to be China's largest internet vertical entry portal

我们致力打造中国互联网垂直领域最大的流量入口

Among internet vertical areas, healthcare[2] is expected to be the No.1 traffic portal in the future 在所有互联网垂类领域中，医疗健康[2]将会是未来流量最大的领域

No.2
Today 今天

No.1
in 5 years 五年后

Total market MAU rank of Internet healthcare among all internet vertical areas 互联网医疗行业月活在互联网各垂直领域中的排名

PAGD is largest internet healthcare entry portal in China 平安好医生是中国最大的互联网医疗流量入口

MAU 月度活跃用户

> Top 2-10

PAGD's MAU exceeds combined MAU of top 2-10 peers[1]
平安好医生的月活超过互联网医疗行业前**2-10**家公司[1]月活的合计总量

1. Excludes internet health peers with health e-commerce as main business 不包括以医疗电商为主要业务的互联网医疗竞争对手; 2. Medical and health 医疗和健康领域

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PAGD is a synergistic entity within PAG Healthcare Ecosystem

平安好医生是平安集团医疗生态圈的重要战略组成

Government 政府

平安智慧医疗
Smart Healthcare

Patient 用户

平安好医生
Ping An Good Doctor

Grasp users 抓取用户

Providers 服务方

Online 线上

平安好医生
Ping An Good Doctor

+

Offline 线下

平安智慧医疗
Smart Healthcare

平安医院管理团队
Hospital Mgmt. Team

Online component 线上服务

Payor 支付

中国平安人寿保险
Life Insurance

平安养老保险
Annuity Insurance

平安医保科技
Health Konnect

平安健康保险
Health Insurance

Empower insurance 赋能保险

Technology 科技

Research institution 研究机构

平安医疗科技研究院
Healthcare Technology Research Institute

户田研究院
Toda Bio-research

Investment institution 投资机构

平安领航基金
Voyager Global Fund

平安创投
Ping An Ventures

平安海外控股
Overseas Holdings

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We are building a bridge between patients and doctors

我们为用户搭建专业的医患沟通桥梁

E A Bridge between Patients and Doctors

医患沟通桥梁

A Patient 患者

C Health 健康

Health management
健康管理

Sub-health[1] management
亚健康[1]管理

D Medical 医疗

General practice
全科医疗

Specialized healthcare
专科医疗

B Doctor 医生

F Ping An Healthcare Ecosystem Resources 平安医疗生态圈资源

Quality brand
品质品牌支撑

Channel resources
渠道资源支撑

Client resources
客户资源支撑

Healthcare technology
医疗科技支撑

1. Sub-healthy states refer to non-disease physical or mental disorders such as mild cervical pain and insomnia 亚健康指代非疾病的身体活心理不适，例如轻微颈椎疼痛和失眠

四大流量渠道：个人用户、保险服务、企业服务、互联网医院

C-end

Individual customers
个人用户

I-end

Insurance services
保险服务

+B-end

Corporate services
企业服务

+H-end

Internet hospitals
互联网医院

平安好医生

Provide **346mn** users [1] with 7 x 24 access to quality online healthcare
为**3.46亿**用户[1]提供7x24小时的高质量在线医疗服务

Combined healthcare services and insurance for **210mn** PAG financial service customers[2]
为平安集团**2.1亿**金融客户[2]创造保险与健康服务的深度结合

Innovative health solutions for **4mn** PAG corporate clients
为平安集团**400万**企业用户打造创新健康方案

14 internet hospitals launched[3]
上线**14**家互联网医院[3]

1. Registered users as of 2020.6.30 截至2020年6月30日的注册用户；2. As of 2020.6.30 截至2020年6月30日；3. Internet hospitals are virtual hospitals attached to physical hospitals, offering online diagnosis, prescription and treatment services,. They can be connected to Social Health Insurance (SHI) once approved 互联网医院是基于实体医院在线上提供诊断、处方和治疗服务的虚拟医院，如获得批准可接入社会医保系统获得报销；Number of internet hospitals launched as of 2020.6.30, and is still growing 截至2020年6月底的上线互联网医院数量，仍在增长中

Case example (B-end): Professional, convenient, and reliable corporate clinics

B端案例：为企业用户打造专业、便捷、安心的企业医务室

Dedicated medical team
专属医护团队

1
Dedicated in-house general doctor
专属驻司全科医生

+

N
Rotated in-house specialized doctors
定期驻司专科医生

One-stop smart healthcare terminal
一站式智能医疗终端

平安好医生 | 一分钟诊所

7 X 24 availability
7 X 24 小时

Zero-waiting
0 等待

Video consultations
远程视频问诊

Corporate health dashboard
企业健康指标全视通

Visualized health data of employees
员工健康数据 可视化

Already covered **500+** corporates for healthcare and medical check services 已覆盖 **500+** 家企业医疗健康及体检服务

Potential 未来潜力

Innovative health solutions for **4mn** PAG corporate clients
为平安集团 **400万** 家企业用户打造创新健康方案

医生体系：定制化专属工作台赋能医生

Doctor virtual office
医生工作台

Doctor virtual office addressing 5 needs of doctors: research, income, branding, capability, and efficiency
专属医生工作台赋能医生，满足医生学术、收入、品牌、能力、效率五大需求

Renowned doctors 大咖医生	National experts 全国顶尖专家	Brand 创品牌
External doctors 外部签约专家	~10,000 contractual specialists[1] ~1万名签约专家[1]	Professionalism 保专业
In-house doctors 驻司医生	Medical team[2] 1.8k+ 医疗团队[2] 1,800人+	Convenience 增便捷
AI doctor assistant AI医生助手	3k+ common diseases 3千+常见病覆盖	Efficiency 提效率

健康：打造全周期健康管理体系

1 file per person
一人一档

Care from private doctors
以私家医生为核心的全面管理

Multi-pronged management
多管齐下

Online: professional coaches
线上：专业指导

Online health records
电子健康档案

Massive health data accumulated throughout entire management process
积淀海量数据，贯穿健康管理全周期

+ **Health**
健康

Exercise
健康运动

Healthy diet
健康饮食

Healthy lifestyle
健康生活

+AI
人工智能

私家医生

+Experts
专家

Workplace care
职场照护

Consumer healthcare
消费医疗

Target sub-healthy population mgmt.
人群管理

Sub-health[1]
亚健康[1]

+

Private fitness coach
私人教练

Private nutritionist
私人营养师

Psychological counselor
心理咨询师

私人营

O2O[2]

| Dental care 口腔 Pharmacies 药店 | Fitness 健身 Beauty care 美容 | Health checkup 体检 Rehabilitation 康养 |

Offline: 160k+ partnered institutions
线下：16万+合作机构

D Medical: Specialty-driven medical services

医疗：专科引领的医疗服务

Specialty-driven 专科引领

820mn+ cumulative queries[1]
8.2亿+次累计咨询量[1]

23 hospital departments covered
23个医院科室覆盖

General
全科

Dermatology
皮肤科

TCM[2]
中医科

OBGYN[3]
妇产科

Pediatrics
儿科

Urology
泌尿外科

Other specialties
其他专科

Smart phone and other intelligent terminals
手机及智能终端

Photo and text
图文

Phone
电话

Audio
语音

Video
视频

Vital signs
测量体征

Seamless O2O[4] 线上线下全打通

Online to offline testing services
检测O2O[4]闭环

Follow-up management
随访管家

Referral and group consultation
转诊会诊

Private doctor
私家医生

1. Cumulative online queries as of 2020.6.30 截至2020年6月30日的累计咨询量；2. Traditional Chinese medicine 中医科；3. Obstetrics & Gynecology 妇产科；4. Online to offline 线上到线下

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E Ping An Doctor Home: A bridge connecting needs of patients and doctors

平安医家：匹配医患需求，搭建医患桥梁

平安 ❤ 医家

Doctor Home: one-stop service platform
医生之家：一站式的医生服务平台

Income 收入
Brand 品牌
Capability 能力
Research 学术
Efficiency 效率

~10,000 external doctors using our online office
为平安好医生平台上~1万 的外部医生打造专属服务平台

Private Doctors: personalized services
私家医生：每个人的专属医生

一下雨就膝盖疼的毛病
动动手指就能问医生 心里踏实

Lifelong health services for **210mn** financial service customers and **50mn** families of Ping An Group
为平安**2.1亿**金融客户、**5000万**个家庭提供伴随一生的健康呵护

Family Doctors: health gatekeeper
家庭医生：每个家庭的健康守护

教会老爸用手机看病
他特别开心
没想到这么方便 买药还能送到家

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F Incubated by Ping An Group with strong synergies

孵化于平安集团，具有强大的协同效应

- **Brand reputation of Ping An** can evoke user's immediate trust 平安的品牌声誉可以即刻唤起用户信任

- **Ping An Smart Healthcare** provides **smart technology solutions** covering supervision platform, disease prediction, AskBob clinical support (450k doctors), etc. 平安智慧医疗提供包括一体化监管平台、智能疾病预测、辅助诊疗工具AskBob（45万医生）等全方位服务

Quality Brand
品质品牌

Healthcare Technology
医疗科技

中国平安
PING AN
保险·银行·投资

Client Resources
客户资源

Channel Resources
渠道资源

- Cross-sell to **the large financial service customer bsae** of Ping An Group 面向平安集团的大量金融客户行进交叉销售

- Well positioned to benefit from the **close relationship with corporate clients** for new business expansion 和企业客户的紧密合作可助力新业务拓展

1. As of 2020.6.30 截至2020年6月30日

Summary: PAGD enjoys a dominant market position in internet healthcare

总结：平安好医生持续领跑互联网医疗市场

Largest internet healthcare entry portal
最大的互联网医疗流量入口

Registered users 注册用户	346mn 3.46亿
MAU 月活用户	67mn 6,700万
Daily queries 日咨询量	830k 83万

Largest in-house doctor group
最大的自建医生团队

In-house medical team 驻司医护团队	1,800+
Common diseases covered 常见病诊疗覆盖	3,000+
External experts nationally 医生生态聚集全国专家	~10,000

Largest offline network
最大的线下服务网络

Partnered pharmacies[1] 合作药店[1]	110k+ 11万+
Partnered clinics[2] 合作诊所[2]	49k+ 4.9万+
Health check-up centers[3] 体检中心[3]	2,000+

Exceptional financial performances in 2020H1

2020年上半年财务表现亮点

Total revenue
营业收入

(RMB in billion, 十亿人民币)

2.27 → 2.75 **+21%**

2019H1 | 2020H1
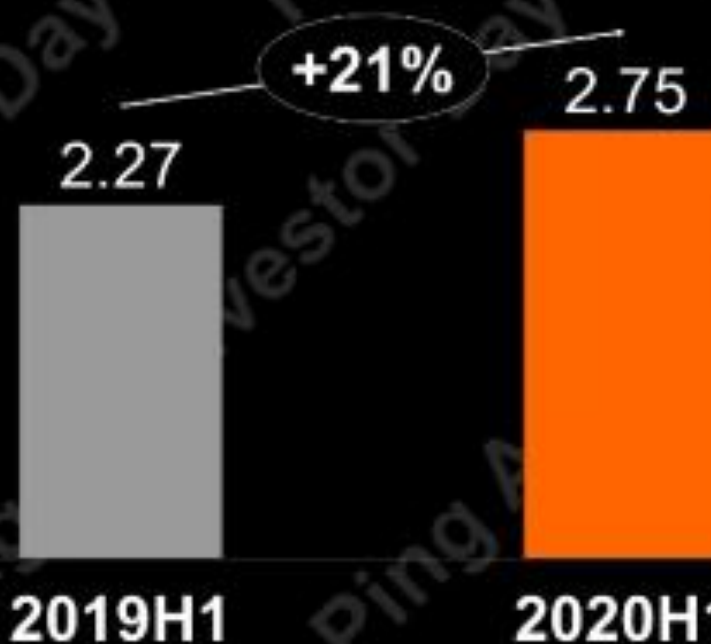
Online medical services revenue
在线医疗收入

(RMB in million, 百万人民币)

336 → 695 **+107%**

2019H1 | 2020H1
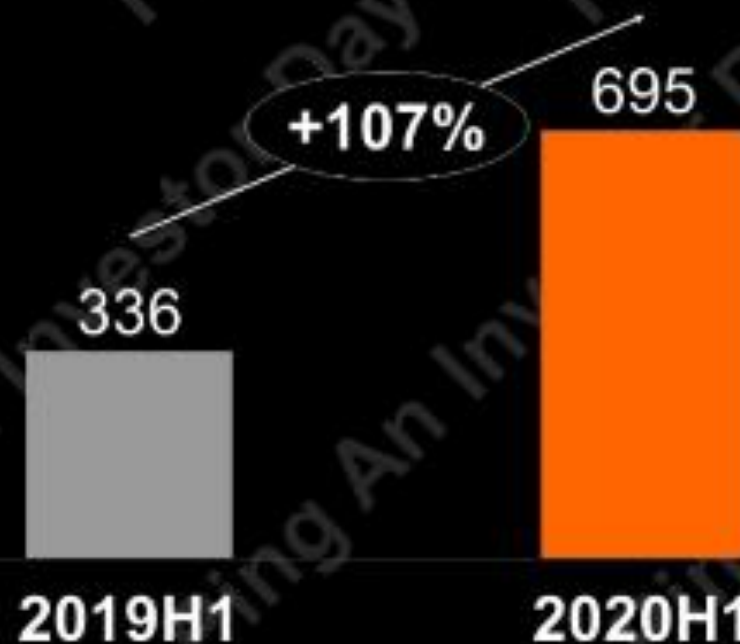
Membership products[1] revenue
会员产品[1]收入

(RMB in million, 百万人民币)

140 → 420 **+200%**

2019H1 | 2020H1

1. Membership products such as Health 360 for critical illness insurance customers, Private Doctor for corporate clients, etc. 会员产品包括为重疾险客户提供的就医360服务包、为企业客户提供的私家医生服务包等

Recap: Key message

回顾：关键点

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03

Smart Healthcare
智慧医疗

Geoff Kau

高孟轩

Co-President, Ping An Smart City
CEO, Ping An Smart Healthcare
平安智慧城市联席总经理
平安智慧医疗首席执行官

Guotong Xie

谢国彤

Chief Healthtech Scientist
Ping An Group
平安集团首席医疗科技科学家

Market attractiveness: Significant market potential for smart healthcare solutions across ecosystem, with diversified revenue model

市场吸引力：跨生态圈的智能医疗解决方案具有巨大的市场潜力，收入模式多元化

Ping An Smart Healthcare: Provides best-in-class solutions to 90 cities, 20k providers, 450k doctors and 2.5mn patients

平安智慧医疗：为约90座城市、2万家医疗服务提供者、45万名医生以及250万名患者提供一流的解决方案

Global leading technology capabilities: World's largest smart clinical support platform, chronic disease management platform and medical database, second highest number of patent application in the world

全球顶尖科技实力：全球最大智能诊断辅助平台、全球最大慢病管理平台、全球最大的医疗数据库、全球第二医疗科技专利申请数

Smart Healthcare targets the four key pillars in healthcare system

智慧医疗致力于医疗系统的四大核心领域

Ping An Smart Healthcare Solution
平安智慧医疗解决方案

A Enable Government 赋能政府

B Enable Providers
管机构

C Enable Doctors
管医生

D Enable Disease Control
管疾病

E Enable Medicines
管药品

F Healthcare Technology Driven 医疗科技驱动

China healthcare market has great potential with diversified business models

中国医疗市场有着巨大潜力，变现模式多元

Market 市场

Four addressable markets as example: 以四大潜在市场为例

Providers 机构

Total Hospital Spending[1]
医院总费用[1]

1.4trn
1.4万亿 VS. 5.3trn
5.3万亿

Doctors 医生

Total Doctor Spending
医生总费用

1.0trn
1.0万亿 VS. 5.0trn
5.0万亿

RMB 人民币

Disease 疾病

Public Health Gov. Spending
公卫总费用

200bn
2千亿 VS. 750bn
7千5百亿

Pharma & device 药械

Pharmaceutical & device market[2]
药械市场规模[2]

2.1trn
2.1万亿 VS. 6.2trn
6.2万亿

RMB 人民币

System & software Revenue
软件系统收入

Platform Development
平台搭建

Software Operation Service Revenue
软件运营服务收入

Software-as-a-Service
软件即服务

Transaction-based Revenue
增值服务收入

Value-added services
增值服务

Payors 主要付费方

Government 政府　　Provider 机构　　Doctor 医生　　Corporation 企业　　Pharma 药企

1. 2018 data, exclude doctor spending 基于2018年数据、不包含医生费用 2. 2018 data and include both pharmaceutical production and circulation 基于2018年数据、包含医药生产和流通

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We are leading our competitors by coverage and technology

平安智慧医疗以落地覆盖和技术成果领先于竞争对手

平安智慧医疗 Smart Healthcare

Traditional IT Co.s
传统信息化厂商

- **Strong stickiness with government & providers**
  与政府、机构客户粘性强
- **Difficult to scale up, limited business model**
  规模化难、商业模式受限

平安智慧医疗 Smart Healthcare

- **Technology driven "IT + Platform" integrated solution provider**
  科技驱动的"信息化+平台"综合解决方案提供商
- **Diversified business models, synergy with Ping An health eco-system**
  多元商业模式、平安医疗生态圈协同效应

Internet Companies
互联网企业

- **Online traffic / transaction driven**
  线上流量和交易驱动
- **Limited access to core HC resources and applications**
  核心医疗资源和应用触及有限

Offline Software Focused 专注软件交付 → **Online Traffic Focused** 专注流量入口

平安智慧医疗 Smart Healthcare VS. Key Competitors[1] 主要竞争对手

平安智慧医疗		Key Competitors[1]
90	cities covered 城市覆盖	**~60**
20k	AI[2] coverage in providers AI[1]机构落地数	**~15k**
~3k	AI models AI 模型数	**<1.5k**

Our smart solutions have been rolled-out in ~90 cities with global footprints

智慧医疗解决方案已落地~90地市，并在海外拓展

China
中国

Hong Kong, China
中国香港

Philippines
菲律宾

USA
美国

Romania
罗马尼亚

Singapore
新加坡

- Being deployed in **90** cities
  90地市合作推进中
- Covering **~20,000** providers
  ~2万家医疗机构覆盖
- Serving **450,000+** doctors
  服务**45万+**医生
- Service used **300mn** times
  服务调用**~3亿**次

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Enable government: creating a gateway to offline stakeholders

赋能政府：作为服务线下医疗相关方的入口

Size 规模

Solution 解决方案

Supervision + Service
监管+服务

Value 价值

~300 city-level and above Health Commission Bureau
~300家市级以上卫健委

1mn+ providers
100万+家医疗机构

Cost Supervision
费用监管

Physician Supervision
医生监管

Treatment Supervision
诊疗监管

卫健全视通平台

Macro Supervision
宏观监管

Disease Type Supervision
病种监管

Prescription Supervision
处方监管

Quality Supervision
质量监管

20+ cities in Gansu, Chongqing etc. covering 100mn population
服务甘肃、重庆的20+座城市

1亿人口

~20,000 providers covered
覆盖接近2万家医疗机构

Rapid access to providers, physicians and patients
快速覆盖机构、医生和患者

Hospital
医院

CHC[1]
社康

Clinics
诊所

1 community health center, 社康中心

赋能医院："五智" 助力医院全面提升运营

Size 规模

33,000+ hospitals nationwide
全国超过3.3万家医院

~1.4trn RMB Hospital Spending
医院总费用

~230bn RMB government subsidies for public hospitals
~2300亿元政府对公立医院的补贴

Solution 解决方案

① **Smart Management** 智慧管理
Save cost and **lean** managenemnt
降低成本并且精益管理

Save **50%**[1] waiting time
节省50%等待时间

② **Smart Service** 智慧服务

⑤ **Smart Recovery** 智慧康复
Improve **20%**[1] recovery treatment efficiency
提升20%康复治疗效率

Improve **30%**[1] diagnosis efficiency
增加30%诊断效率

③ **Smart Diagnosis** 智慧诊断

④ **Smart Treatment** 智慧治疗
Increase **50%**[1] bed productivity
增加50%床位产能

Smart Hospital Core System (including hospital information system, electronic medical record, etc.)
智慧医院核心系统（包括医院信息系统，电子病历等）

Value 价值

100+ hospitals covered
覆盖100+医院

In-depth integraton with offline patient journey
深耕线下患者旅程

1. Expected results 预期效果

58

C

Enable doctors: AskBob aims to be the "Bloomberg" for doctors

赋能医生：AskBob致力于成为医生的"Bloomberg"智库

Size 规模

~3.8mn Total number of doctors[1]
~380万医生[1]

~4.4mn Total number of nurses[1]
~440万护士[1]

~1trn Doctor spending
1万亿医生总费用

AskBob The brand of AI driven database tools in Ping An Group 平安集团AI数据库工具品牌

Solution 解决方案

Clinical Support 临床辅助

AskBob

Diagnosis Recommendation 诊断推荐   Treatment Plan 治疗方案

~3000 diseases covered
~3000 AI辅助诊疗病种覆盖

86% vs. 51%
Wins in AI vs. Doctor
人机比赛胜出

Medical Imaging
AI影像辅助诊疗

Retina Test 视网膜检查
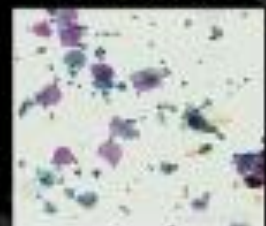
Lung CT 肺部CT

Cervical Pathology 宫颈细胞病理

90+ diseases covered with 90%+ accuracy
90+ 病种覆盖，精度90%+

Research and Communication Support 科研及交流辅助

30mn English and Chinese literatures
3000万中英文文献覆盖
50+ disease management covered
50+疾病管理覆盖
Online forums, conferences & KOL-generated content
线上论坛、会议和专家原创内容

Value 价值

~450k (12%)
Doctor users
医生用户数

15min to 15s
Image diagnosis time
影像诊断时间从15分钟降至15秒

Strong synergy with PAGD to build doctor network
助力平安好医生建设医生网络

1. 2019 data 2019年数据

管病：赋能公卫系统以应对流行病突发事件

Size 规模

Solution 解决方案

Value 价值

~10mn infectious disease cases p.a.
每年传染病例约约十万

200bn RMB public health gov. spending + 45bn RMB one time investment
人民币2千亿政府公卫支出加人民币450亿一次性公卫卫生防控救治能力建设投入

Public health data
公众健康数据

Social activity data
社会数据

Environment data
环境数据

Diagnosis data
诊疗数据

Online medical data
网络数据

Data Network & Analysis mechanism
数据神经网络

Smart Alert 智能预警

- Real-time reporting
  实时上报

- AI-driven data scanning and monitoring
  人工智能辅助数据扫描和监测

Smart Prediction 智能预测

- 40+dimension data analysis
  40+个维度数据分析

- 7-days advance epidemic prediction
  提早7天预测疫情

- Accurate prediction of infection & death
  精准预测死亡与感染

Smart Prevention 智能预防

- Smart clinical assistance
  全流程智能辅医

- Grid-based containment and tracing
  网格化防控和追踪

- Smart decision support and coordination
  智能决策支持和调度

5+
Provinces & cities being deployed
省份和城市落地推广

95+%
Prediction accuracy rate
预测准确率

Integration with public health systems
与公共卫生系统整合

赋能慢病：抗击全民健康的重大威胁

Size 规模

Solution 解决方案

Value 价值

~400mn chronic disease patients nationwide
全国近4亿慢病人群

70% of total healthcare expenditure
占70%整体医疗卫生开支

Smart screening and prediction
诊前-智能筛查和预测

3K+ Index factors 因子

Basic Info 个人基本信息

Service 个人画像服务列表

Lab Test 实验室检查信息

Follow-up 随访信息

Outpatient 门诊就诊信息

Inpatient 住院诊疗信息

40+ Chronic Diseases 慢性疾病

Chongqing COPD example 重庆慢阻肺案例

High Risk 高风险
Coverage 覆盖率：43%

Moderate Risk 中风险
Coverage 覆盖率：50%

Low Risk 低风险
Coverage 覆盖率：7%

Smart treatment
诊中-智能治疗

Risk Prediction Engine 风险预测引擎

Treatment Recommendation Engine 治疗推荐引擎

Treatment Plan 治疗方案

Physician working station 医生工作站

Smart management
诊后-智能管理

Personal Profile 个人画像　**Smart Follow-up** 智能随访　**Monthly Report** 健康月报

Patient mobile end 患者移动端

~2.5mn patients served nationwide
服务~250万患者遍布全国

11.3% to 59.6% HbA1c[1] achieve rate increases from pre- to post-management
管理后vs管理前的糖化血红蛋白达标率

Broaden coverage to providers and patients
扩大机构和患者的覆盖

1. HbA1c : key indicator of blood glucose in diabetic patients; 糖化血红蛋白：衡量糖尿病患者血糖总体控制情况的关键指标

(E) Enable pharmaceuticals: Enable research, control quality and facilitate access

管药：助研究，管质量，控流通

Size 规模	Enable Pharmaceutical R&D 助医药研发	Control Production Quality 管生产质量	Facilitate Medicine Access 控医药流通	Value 价值

~58bn RMB
R&D value
~人民币580亿药物研发价值

~400bn RMB
TCM market value
~人民币4千亿中药市场价值

~800bn RMB
Health insurance payment on medicines
~人民币8千亿医保药品支出

SHIONOGI **T.R.L**
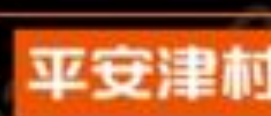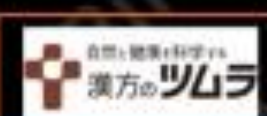
Top New Drug R&D Capabilities
新药研发能力

AI, Nano Biotech and New material Technology in R&D
AI、纳米和新材料技术应用于药物研发

Medical data in Real-World-Evidence Research
医疗大数据应用于真实世界研究

漢方のツムラ **平安津村**

No.1 TCM[1] Granule Producer
汉方颗粒制剂厂商

Build TCM[1] Quality Research Center
建中药质量研究中心

AI driven TCM[1] ingredient origin tracing
AI驱动的中药材智慧溯源

国药集团 SINOPHARM **平安明药**
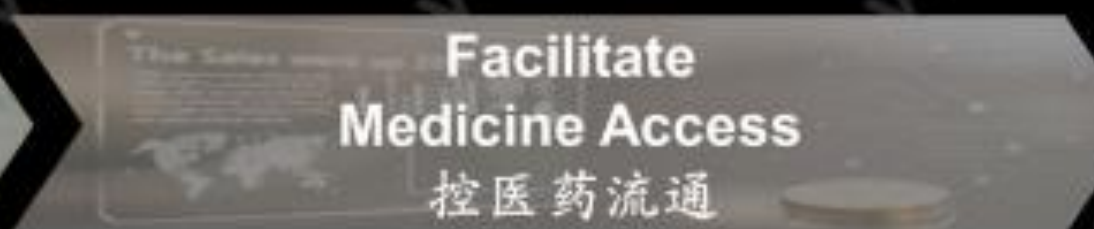
No.1 Pharma Retailor in China
全国医药分销零售龙头

Pharmacy Benefit Management (PBM)
药品福利管理

Group Purchasing Organization (GPO)
集中采购平台

6
Drugs in the pipeline
待上市药物

120+
TCM production standards
中药生产标准

400+
Retail pharmacies covered
零售药店覆盖

1. TCM : Traditional Chinese Medicine 中药

我们的核心优势是领先的数据和知识

Disease Database
疾病库

- ~**100k** disease concepts
  ~**10**万疾病概念
- **11k+** symptoms
  1.1万**+**症状百科
- **420k** disease terms
  42万疾病术语

Medical Product Database
医疗产品库

- ~**180k** drug instructions
  ~**18**万药品说明书
- **84k** Chinese medicine formulas
  8.4万中药方剂
- **57k** medical device info
  5.7万医疗器械信息

Treatment Database
处方治疗库

- **33mn** medical literatures
  3千**3**百万医学文献
- ~**150k** prescriptions
  ~**15**万处方信息
- **17k** medical guidelines
  1.7万医疗指南

Medical Resource Database
医疗资源库

- ~**500k** doctor info
  ~**50**万中国医生信息
- **2.2mn** medical researchers
  220万科研人员
- **2mn** provider info
  200万医学机构信息

Patient Info Database
个人健康库

- **1bn** medical records
  10亿诊疗信息
- **0.3bn** medical examination info
  3亿体检信息
- **29bn** online Q&A
  290亿线上问答

Largest scale database
规模最庞大

Most advanced technology
科技最领先

Most complete dimension
维度最完整

Most abundant application
应用最丰富

We have built one of world's largest smart "medical brain" to support AI decisions

我们建立了强大的"医疗大脑"以支持人工智能决策

Data Processing
数据处理

Smart Data Cleansing
智能化数据清洗

Medical Data Structuring
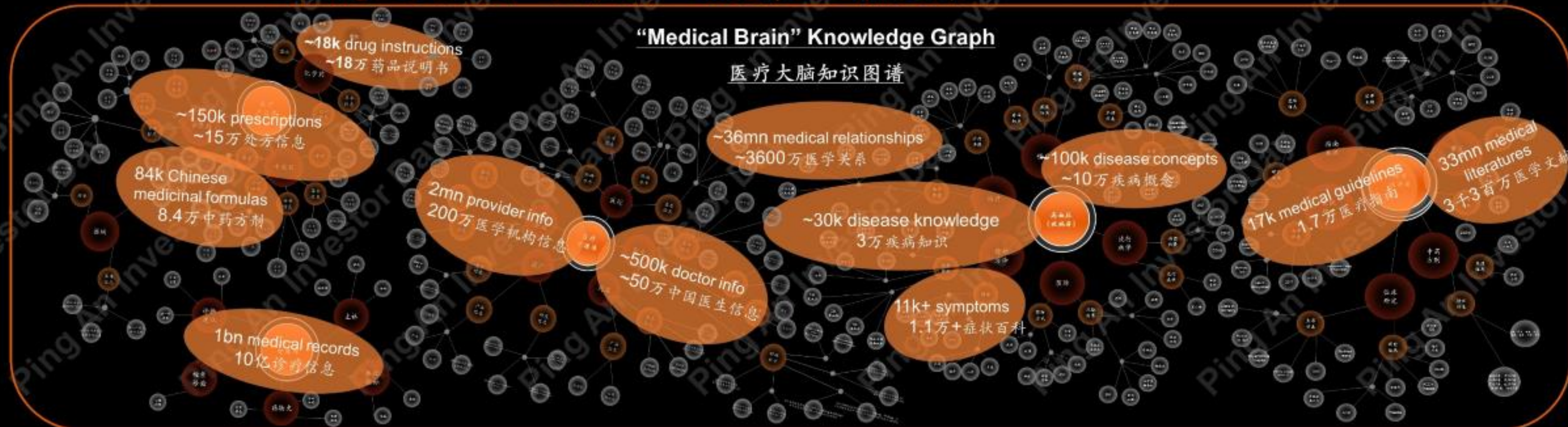结构化医学数据

Standardizing Clinical Terms
标注化临床术语

Comprehensive Data Analysis
全面化数据洞察

"Medical Brain" Knowledge Graph
医疗大脑知识图谱

~18k drug instructions
~18万药品说明书

~150k prescriptions
~15万处方信息

84k Chinese medicinal formulas
8.4万中药方剂

~36mn medical relationships
~3600万医学关系

~100k disease concepts
~10万疾病概念

33mn medical literatures
3千3百万医学文献

2mn provider info
200万医学机构信息

~30k disease knowledge
3万疾病知识

17k medical guidelines
1.7万医疗指南

~500k doctor info
~50万中国医生信息

11k+ symptoms
1.1万+症状百科

1bn medical records
10亿诊疗信息

领先的算法训练平台体现差异化优势

Pain Points 痛点

Long processing time
to train large amount of data
训练大量数据
耗时久

High cost
to maintain multiple
operating environment
维护多个运行环境
成本高

Support large-scale parallel testing
支持大规模并行试验

Intelligent scheduling and
allocation of computing resources
智能调度和分配计算资源

30%～50%
Reduced workload
工作量降低

Labeling 标注

Training 训练

AI

Predicting 预测

Optimizing 优化

3-6X
Faster Prediction
预测速度提升

Up to 100X
Higher computing
speed
计算加速

23%
Reduced RAM[1]
内存消耗减少

Value 价值

100%
Support medical model
development
支持医疗算法模型开发

5-8X
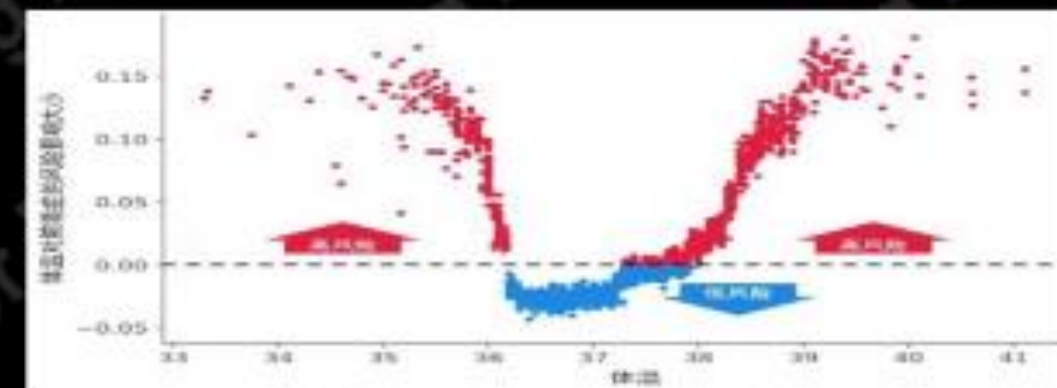R&D efficiency[2] improved
提升研发效率

SFE(赛飞)平台

1. RAM: Random Access Memory. 2. Average execution time for an algorithm to complete work on a set of data. 算法处理数据的平均执行时间。

AI greatly transforms 4 medical areas

人工智能技术使四大医疗领域出现巨大转变

Prediction on multi-dimension data
基于多维数据的预测

Sepsis Prediction in Intensive Care Unit (ICU)
重症监护室（ICU）内脓毒血症风险预测

Built **312** time-based sets of features
构建了**312**种时间相关的特征集合
23% more accurate vs. state-of-art method
比现有最好的方法精度提升**23%**

Image identification and analysis
影像识别与分析

Kidney Pathology Diagonosis
肾脏组织病理分析

95% accuracy of fine-grained lesion classification in IgAN 精度达**95%**的肾小球病变的细粒度分类
92% accuracy of intrinsic cells' recognition
精度达**92%**的肾小球三种固有细胞识别

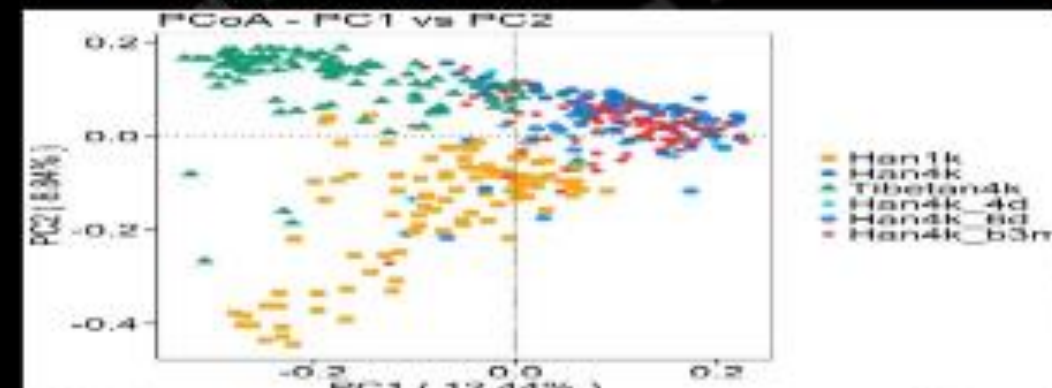### Recommendation with reinforcement learning 基于强化学习的推荐

Diabetic Nephropathy Clinical Decision Support
糖肾的强化学习治疗推荐

Intelligent recommendation for comprehensive and long-term disease treatment
智能推荐综合且长期的疾病治疗方案
The risk of kidney failure reduced by **25%**
降低**25%**的肾衰竭风险

Precision medicine for disease management 精准医学用于疾病管理

Analysis of Intestinal Microflora at high altitude
高原环境对肠道微生物影响分析

New method for diabetes managemtent through Roseburia supplement
研发糖尿病管理新方式：通过补充Roseburia菌或可缓解糖尿病症状

66

Market attractiveness: Significant market potential for smart healthcare solutions across ecosystem, with diversified revenue model

市场吸引力：跨生态圈的智能医疗解决方案具有巨大的市场潜力，收入模式多元化

Ping An Smart Healthcare: Provides best-in-class solutions to 90 cities, 20k providers, 450k doctors and 2.5mn patients

平安智慧医疗：为约90座城市、2万家医疗服务提供者、45万名医生以及250万名患者提供一流的解决方案

Global leading technology capabilities: World's largest smart clinical support platform, chronic disease management platform and medical database, second highest number of patent application in the world

全球顶尖科技实力：全球最大智能诊断辅助平台、全球最大慢病管理平台、全球最大的医疗数据库、全球第二医疗科技专利申请数

Thank you
感谢聆听

中国平安 PINGAN
金融·科技
2020 HEALTHCARE INVESTOR DAY