



博雅互动国际有限公司
(股份代号: 0434.HK)



2015年中期业绩

目标成为网络棋牌类游戏的领先全球品牌

1

受到网页棋牌游戏整体市场的下行风险和国内移动短信支付渠道整顿的影响，尽管及时调整运营和市场策略，第二季度业绩还是出现一定幅度的下滑

- 2015年上半年，收益约为人民币437.0百万元，同比减少4.6%

2

移动端用户数量持续增长，与网页端两极分化的情况愈加明显

- 移动端每日活跃用户数达到5.3百万人，按年同比增加30.4%
- 移动端每月活跃用户数达到22.6 百万人，按年同比增加26.5%

3

依靠灵活多变的支付渠道转换和货币化策略，保持移动端的付费玩家增长

- 移动端的付费玩家群体数量增加至2.6百万人，同比增加82.3%
- 移动端付费玩家平均收益
 - 《德州扑克》系列：按年同比上升 31.0%
 - 其他游戏：按年同比上升 2.4%

4

扩展海内外在线分发管道

国内

- 继续保持了跟国内三大电讯营运商的紧密合作，最大限度争取资源，为移动短讯支付渠道整顿后的市场布局打下了良好的基础
- 积极推进线下活动和比赛

海外

- 深化与Facebook、Google、LINE等大型社交平台的合作关系
- 加强本地化的线下活动配合
- 扩大玩家群体和加强玩家对游戏的热衷程度

2015年中期业绩



2015年中期业绩

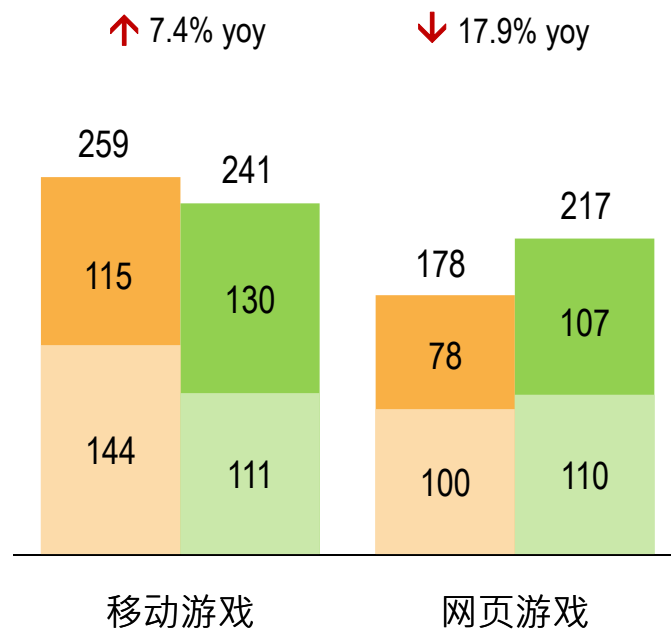
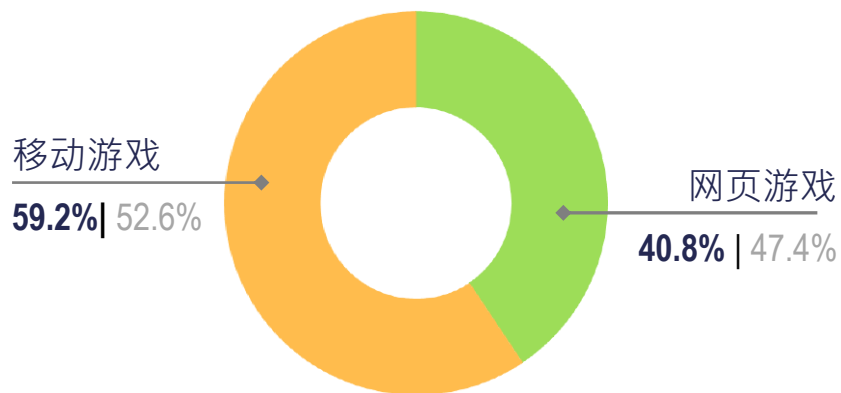


| 人民币 千元 | 2015年 上半年 | 2014年 上半年 | 变化 |
|----------------|--------------|--------------|-----------|
| 收益 | 437,036 | 457,951 | -4.6% |
| 毛利 | 221,873 | 283,851 | -21.8% |
| 本公司拥有人应占利润 | 73,830 | 137,836 | -46.4% |
| 毛利率 | 50.8% | 62.0% | -11.2个百分点 |
| 纯利率 | 16.9% | 30.1% | -13.2个百分点 |
| 每股基本盈利 (人民币 分) | 10.44 | 21.49 | -51.4% |
| 每股摊薄盈利 (人民币 分) | 10.08 | 18.79 | -46.4% |

收益按游戏类型分析

2015年上半年 | 2014年上半年

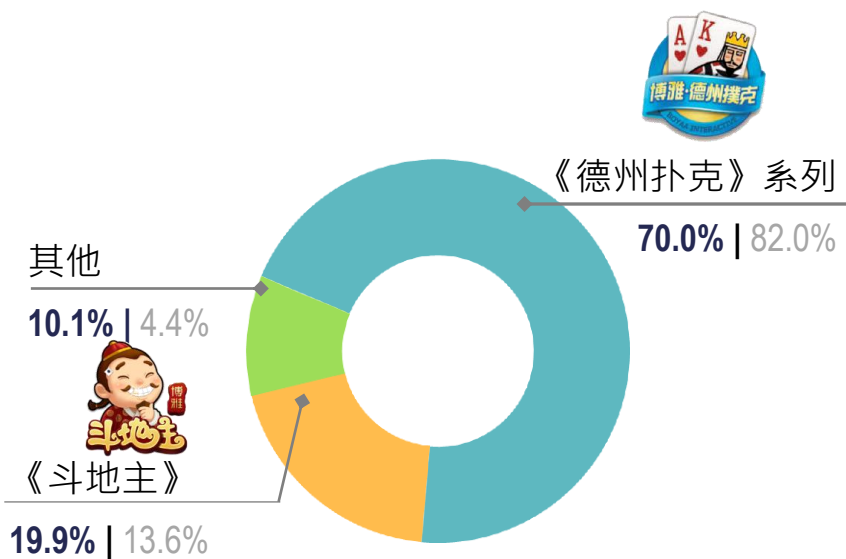
(人民币 百万)



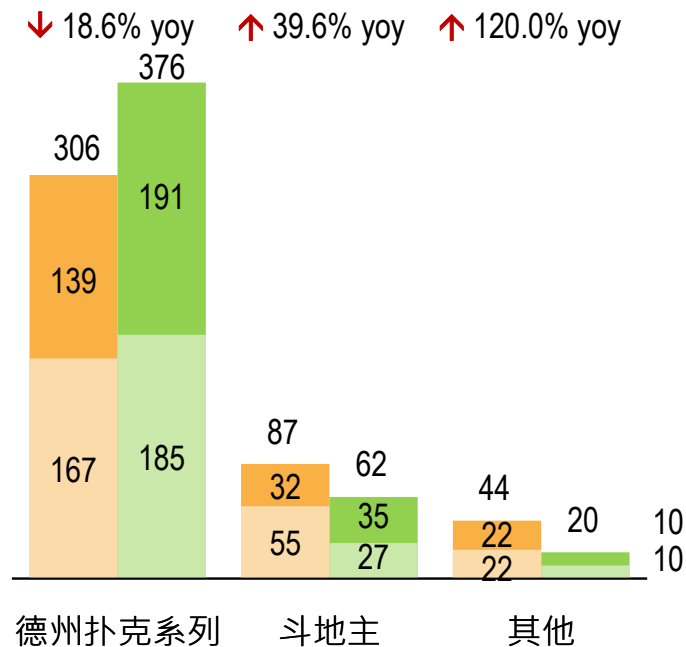
■ 2015年第二季度 ■ 2014年第二季度
■ 2015年第一季度 ■ 2014年第一季度

收益按游戏分析

2015年上半年 | 2014年上半年



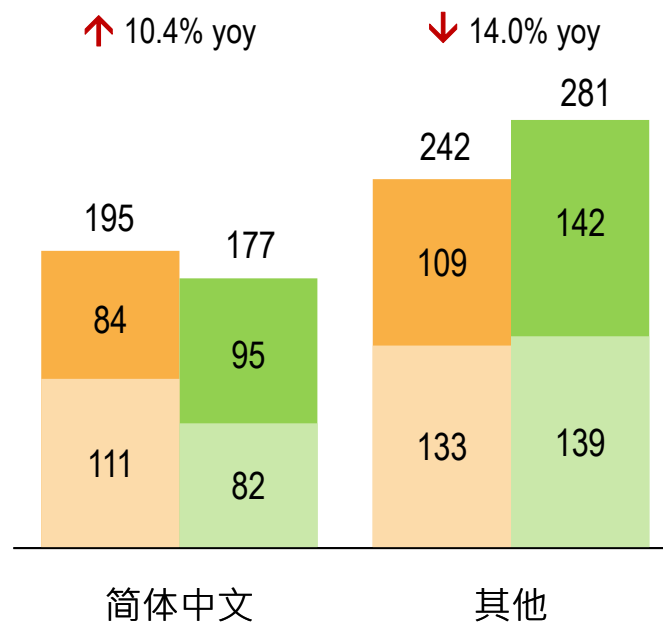
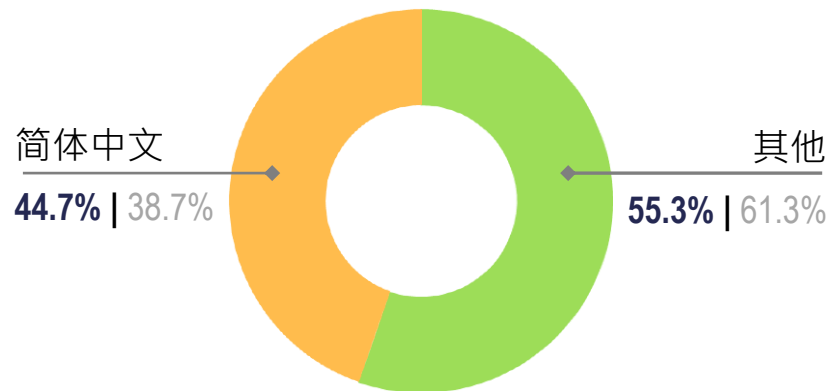
(人民币 百万)



收益按游戏语言版本分析

2015年上半年 | 2014年上半年

(人民币 百万)

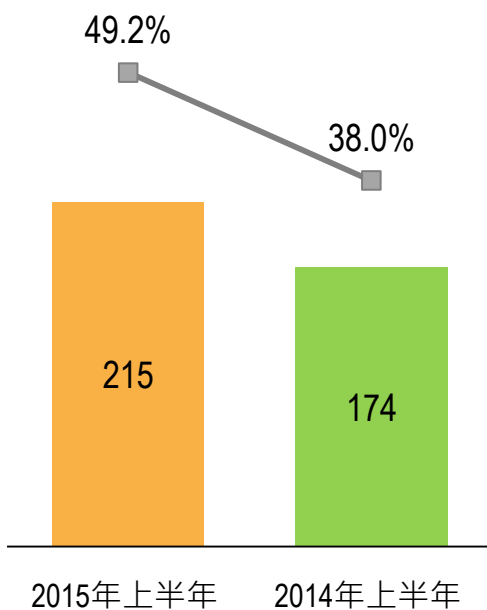


■ 2015年第二季度 ■ 2014年第二季度
■ 2015年第一季度 ■ 2014年第一季度

2015年上半年成本及开支

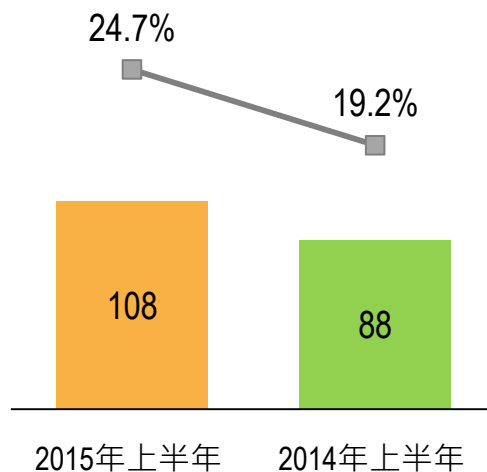
收益成本

(占收益百分比, 人民币百万)



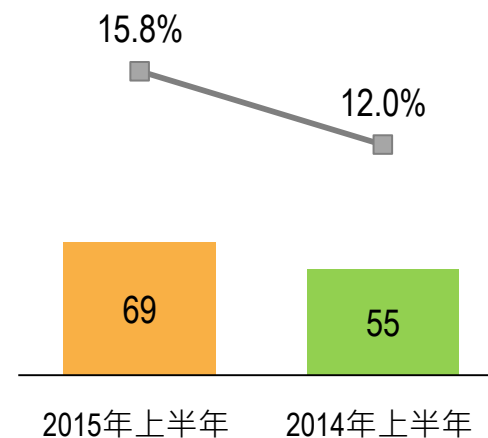
销售及市场推广开支

(占收益百分比, 人民币百万)



行政开支

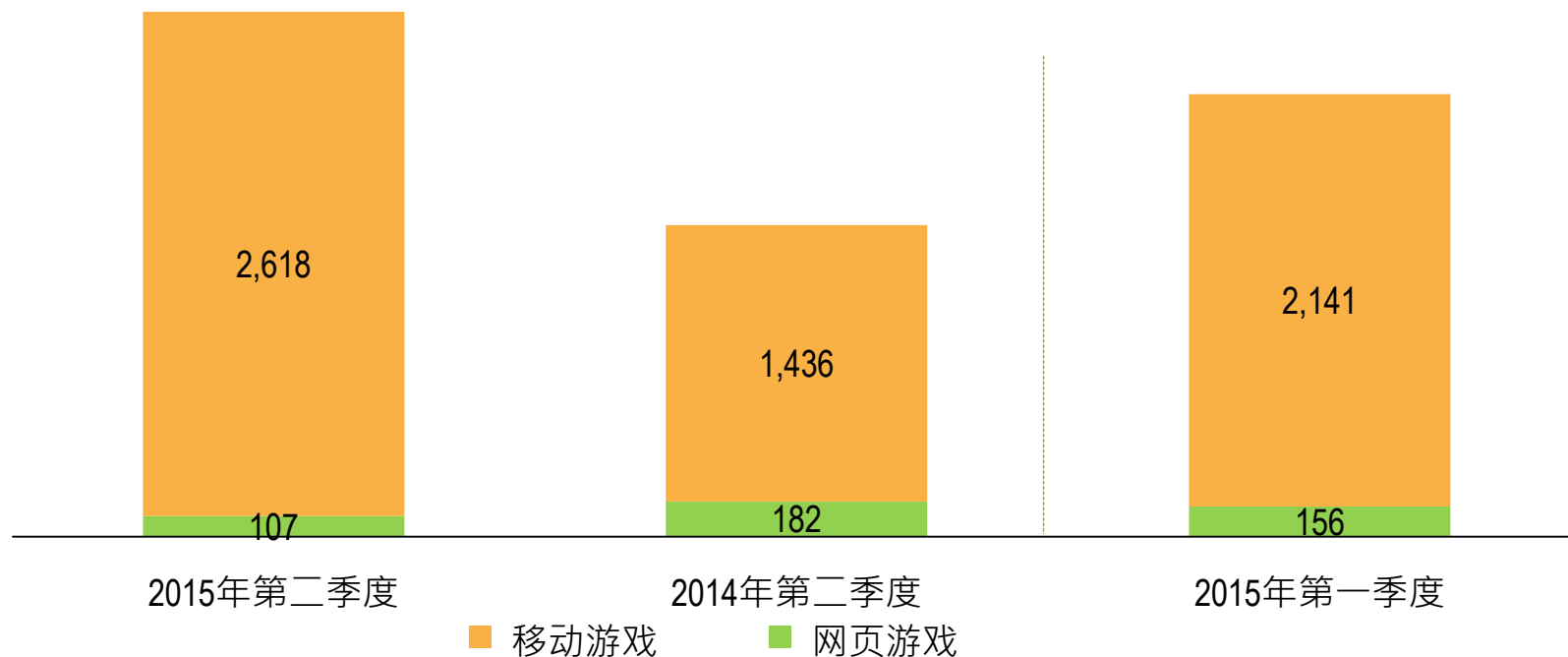
(占收益百分比, 人民币百万)



- 依靠灵活多变的支付渠道转换和变现策略，保持移动端的付费玩家增长

付费玩家

(‘000)



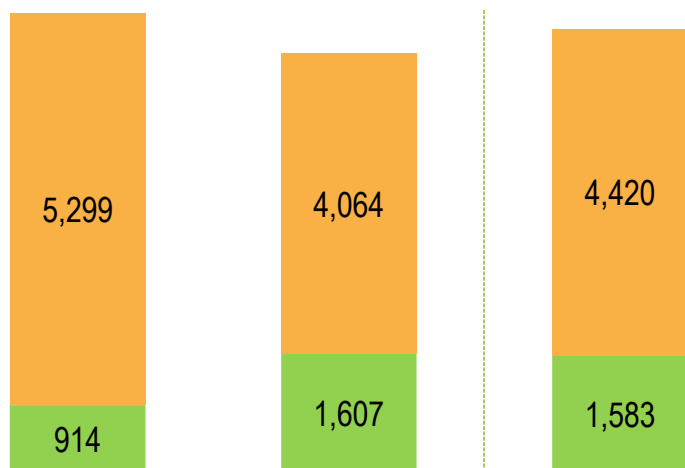
| 付费玩家 | 同比变化 | 环比变化 |
|------|--------|--------|
| 总计 | +68.4% | +18.6% |
| 移动游戏 | +82.3% | +22.3% |
| 网页游戏 | -41.2% | -31.4% |

每日活跃用户及每月活跃用户

- 移动端游戏市场增长，持续推动每日活跃用户及每月活跃用户的增加

每日活跃用户

('000)

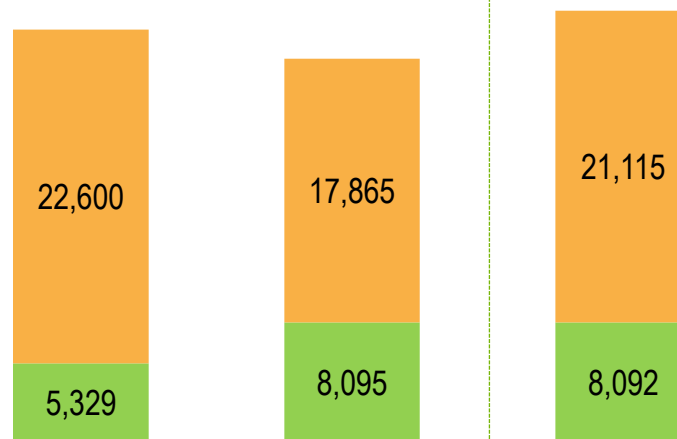


2015年第二季度 2014年第二季度 2015年第一季度

■ 移动游戏 ■ 网页游戏

每月活跃用户

('000)



2015年第二季度 2014年第二季度 2015年第一季度

■ 移动游戏 ■ 网页游戏

| 每日活跃用户 | 同比变化 | 环比变化 |
|--------|--------|--------|
| 总计 | +9.6% | +3.5% |
| 移动游戏 | +30.4% | +19.9% |
| 网页游戏 | -43.1% | -42.3% |

| 每月活跃用户 | 同比变化 | 环比变化 |
|--------|--------|--------|
| 总计 | +7.6% | -4.4% |
| 移动游戏 | +26.5% | +7.0% |
| 网页游戏 | -34.2% | -34.1% |

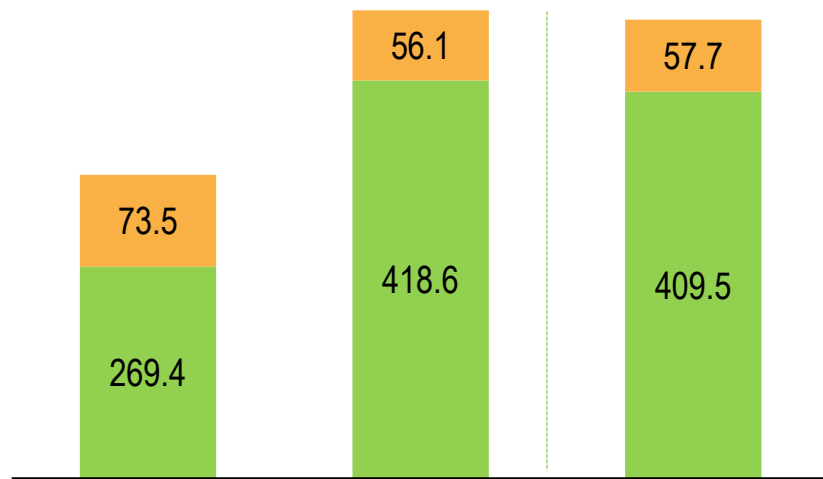
主要游戏的每名付费玩家平均收益 (ARPPU)



- 斗地主在移动端的ARPPU受国内移动短讯支付渠道整顿的影响较大

德州扑克ARPPU

(人民币元)

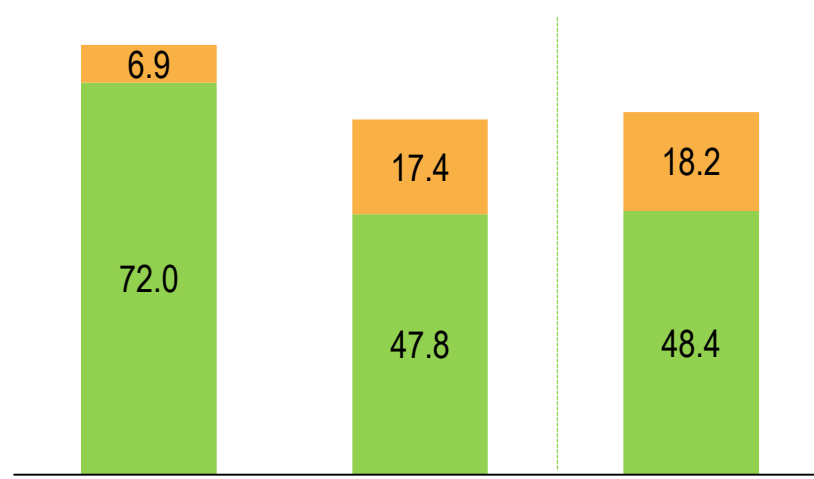


2015年第二季度 2014年第二季度 2015年第一季度

■ 移动游戏 ■ 网页游戏

斗地主ARPPU

(人民币元)



2015年第二季度 2014年第二季度 2015年第一季度

■ 移动游戏 ■ 网页游戏

德州扑克 ARPPU

同比变化

环比变化

移动游戏

+31.0%

+27.4%

网页游戏

-35.6%

-34.2%

斗地主 ARPPU

同比变化

环比变化

移动游戏

-60.3%

-62.1%

网页游戏

+50.6%

+48.8%

展望



1 游戏开发

| | |
|--------------------|----|
| 截至2015年6月30日游戏总数 | 31 |
| 截至2015年6月30日提供语言版本 | 19 |
| 2015年下半年新增游戏 (目标) | 5 |

- 继续加强和扩大棋牌类游戏组合:
 - 地方性棋牌游戏
 - 重点发展新渠道 (如移动设备及互联网电视)

2 举办有影响力的赛事及玩家活动



3 渗透新兴市场



中国

- 针对地方性棋牌游戏加大研发及推广, 保持增长势头



泰国



印度



越南



中东地区

4 物色业务发展新商机

2015年第一季度

- 成功收购棋牌游戏开发及运营商 Coalaa 100% 股权
 - 代价人民币500万
 - 进一步完善游戏品类
 - 进一步拓展海外市场份额, 尤其是泰国市场

2015年第二季度

- 投资极思维12%股权, 一家专注于电子产品的发展及销售及智能应用的发展的公司
 - 代价人民币360万

加强在前沿技术的发展, 保持在技术领域的领先地位

问答环节



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