Current online game status in Japan

BroadBand Security, Inc.
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BroadBand Security, Inc.

- We BroadBand Security provides followings
  - Internet connecting line. (ISP)
  - Management and monitoring service. (MSP)
  - Secure mail solutions. (ASPs)
  - Network integration service. (N/I)
  - Security services. (Penetration-Test, Source code analyze service)

- We have many customers of online game distributers
  - Provide network connectings
  - Provide monitoring services
  - Provide network integrations.
  - Provide security check of their web or other systems.

Popular Online Games in Japan

	2004		2005		2006	
1	Ragnarok Online	41.55%	Final Fantasy XI	13.74%	Skatto Golf Pan-ya	10.62%
2	Final Fantasy XI	17.91%	Master of Epic	12.87%	Ragnarok Online	6.07%
3	Han Game	8.45%	Ragnarok Online	12.28%	Maple Story	5.71%
4	Tails Weaber	8.11%	Mabinogi	11.99%	Final Fantasy XI	4.99%
5	Mabinogi	7.77%	Guild Wars	8.77%	RED Stone	4.48%
6	Skatto Golf Pan-ya	5.74%	Tails of eternia online	7.60%	Trick Star +	3.97%
7	Phantasy star online(DC)	5.74%	Tails Weaber	6.14%	Professional Baseball Famista Online	3.11%
8	Trickster	5.07%	Trickster	6.14%	Tails Weaber	2.75%
9	Maple Story	5.07%	Tokimeki-Memorial Online	5.56%	Lineage II	2.67%
10	Phantasy star online(BB)	3.72%	Lineage II	4.97%	Mabinogi	2.10%

From The Annual On-line Game industry Report in 2007

MMO RPG	MMO Simulation
MO Sports	Casual

In Japan, Major online game is MMO RPG

Current status in Japan
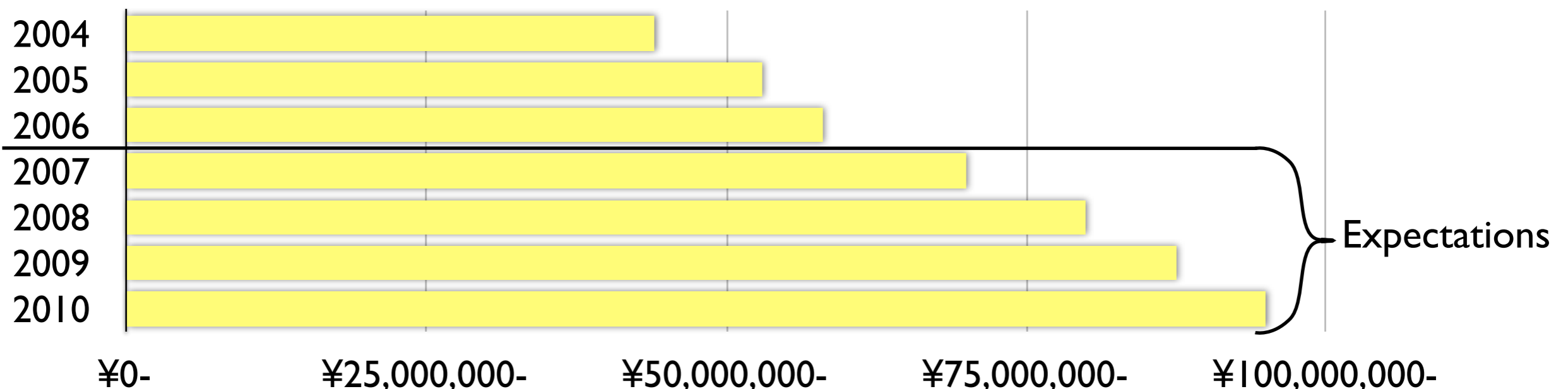
- **Grow up the game title.**
  - Many titles are from KOREA, US, and China.
  - At Mar. 2007, there are 172 game titles are served.
    - This titles are need to install client software on the users PC.
    - Casual games such as flash games or other browser based games are not included.
  - At Mar. 2007, there are 19 game titles are ended the service.
- **Charging models are changed**
  - Many of title move to "Fixed Charge" to "Item Charge"
    - New game titles adopt Item Charge model.
  - Some titles are moved to Hybrid (Fixed charge + Item Charge) model.
    - Many of traditional MMO RPG shifts Hybrid model.
  - Using "Web money", "Credit Card", "Prepaid Card".
- **Market is still grown up**

Year	
2004	
2005	
2006	
2007	Expectations
2008	
2009	
2010	

¥0-   ¥25,000,000-   ¥50,000,000-   ¥75,000,000-   ¥100,000,000-

Current status in Japan(cont.)

- **In Japan, growth the teenage woman player.**
  - for ex. "Skatto Golf Pan-ya", "Livly Island", and so on.
    - Four prize is awarded to "Livly Island"
      - Casual games award
      - Teenage award
      - Woman select award
      - Web money award.

"Web Money Award" vote result

	Man		Women		Total	
	number	%	number	%	number	%
Total	23,742	61.0%	15,152	39.0%	38,894	100.0%
10〜19	6,669	50.3%	6,585	49.7%	13,254	34.1%
20〜29	9,975	65.4%	5,278	34.6%	15,253	39.2%
30〜39	5,468	68.7%	2,495	31.3%	7,963	20.5%
40〜49	1,403	67.5%	677	32.5%	2,080	5.3%
50〜59	227	66.0%	117	34.0%	344	0.9%

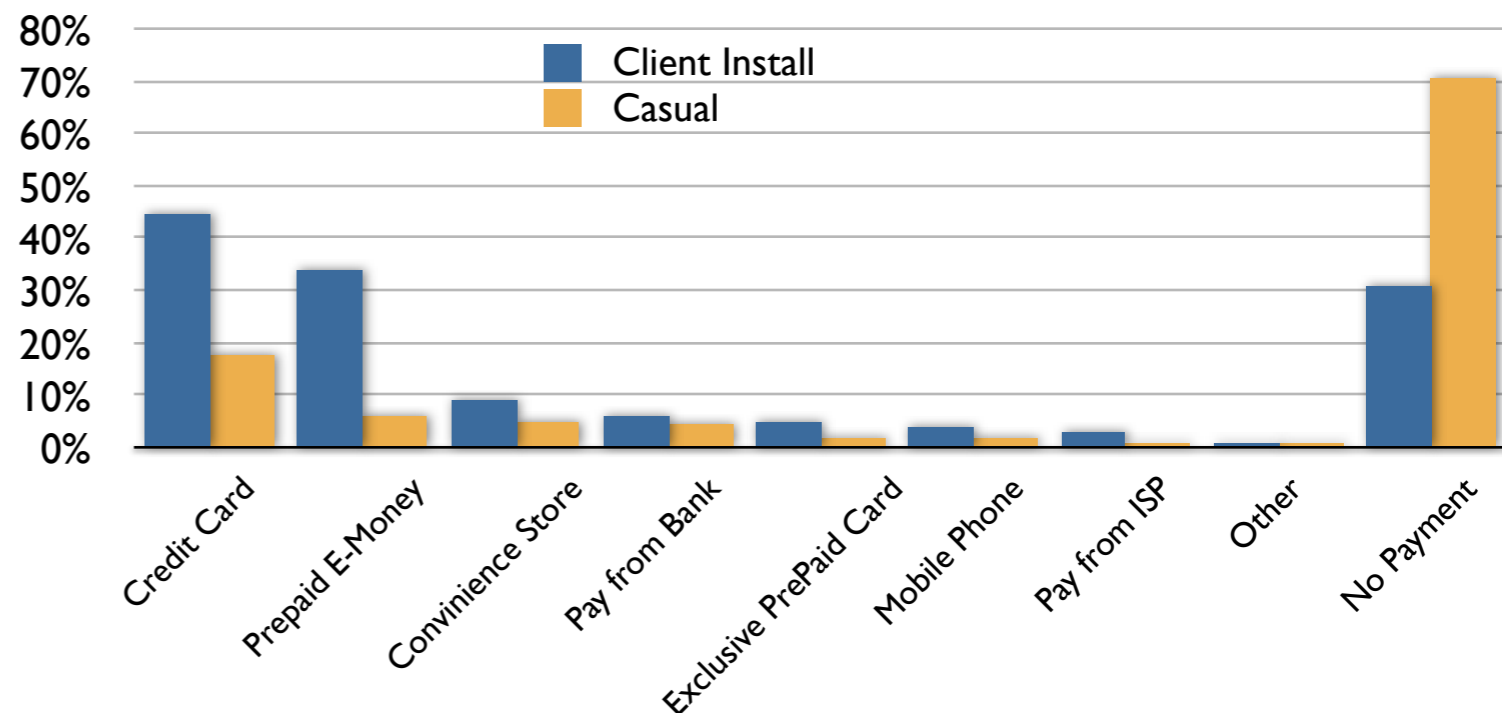From The Annual On-line Game industry Report in 2007

- **Settlement Method**

From The Annual On-line Game industry Report in 2007

Many of casual game players are not pay play fee to play games

Client install games, such as MMO RPGs, players are using Credit cards or Prepaid electric moneys.

- Many of popular games have their players communities.
  - Purpose of communities
    - Exchange their game informations.
    - To make friends.
  - Some players are proud of their "Item completion".
    - They do not compete with completed game mission.
      - Mission completion is very hard because it needs many times.
      - Item completion is relatively easy to complete mission because it can buy.
  - Success key is "User Community Management".
    - Succeeded game has good user community.
    - Community management failure became chaos and game player pass the game.

- Many of Online game company is listed stocks.
  - Gung-Ho Online Entertainment : Mar. 2005
  - GameOn : Dec. 2006
  - Cyber Step : Jul. 2006

- There are many game portal
  - Official game portals are managed by game distributer.
    - They published official game informations
      - Ban!ed players, new events, and others.
    - It distributes their games only.
  - In Japan, there are many 3rd party game portal
    - INSIDE, Online Gamer, BB Games, @nifty games, ...
    - These are distributes "Game community sites", "How to capture" information, "Game comparison" information, "Advertisement of game title and company", and so on.
  - Many of game player uses 3rd party game portal
    - Game player want to get "non-official information", "anonymous information exchange places".
    - Game player candidates want to get reputation of game, charge informations, community informations.

Problems

- From 2006 to now, there are many problems are happened.
  - Cheating games
    - Cheating is the unfairness game play.
    - Cheater uses game-bot(Game Robot)
      - Do same actions eternally.
      - Get character experience, levels, items and so on.
    - Many of distributer introduce security solutions.
      - nProtect: GameGuard
        - Find game-bot players.
      - Cheater and distributer play a cat-and-mouse game.
    - From the ACM, there are 15 genre of cheating
    - Now researching behavior of cheating traffic.
      - By ACM and other society

  - Information Security
    - Online game distributer has users personal informations.
    - Cracker (called hacker) aims users personal informations.
      - for ex. Credit Card number, name, sex, age, and so on.
    - Information leaking is now important risks of online game distributers.

Cheating Method

Specific Method
  Cheating by Exploiting Misplaced Trust
  Cheating by Collusion
  Cheating by Abusing the Game Producer
  Cheating Related to Virtual Assets
  Cheating by Modifying Client Infrastructure
  Cheating by Exploiting Machine Intelligence
  Timing Cheating
Generic Method.
  Cheating by Denying Service to Peer Players
  Cheating by Compromising Passwords
  Cheating by Exploiting Lack of Secrecy
  Cheating by Exploiting Lack of Authentication
  Cheating by Exploiting a Bug or Design Loophole
  Cheating by Compromising Game Servers
  Cheating Related to Internal Misuse
  Cheating by Social Engineering

Conclusion

- Now online game is business.
  - Online game created big economy.
  - Many players are there.
- Game models are changed
  - Package charge → Playing charge(fixed charge) → Item charge
  - MMO RPG → Casual Games → Environment provide model(second life)
- Close up the security issue
  - Leaking personal informations.
  - The occurrence of the gap in the game.
    - Cheating like using game-bot, item copy, and so on.
- Creating the community
  - No face-to-face community of the generic persons.
    - The group which had the common topic of the game was born.
    - The width of the communication spread out.

Thank you very much