

# 국내 Social Network Online Game(SNOG)의 성공 요인 및 전략: Nexon 사례 연구

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The Success Factors and Strategy of Social Network Online Game  
in Korea: A Case Study of Nexon

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## 요 약

네트워크를 통한 정보의 창출 및 교류는 온라인 커뮤니티를 형성하고 온라인 게임과 접목하면서 Social Network Online Game (SNOG)라는 새로운 엔터테인먼트 분야를 만들고 있다. SNOG는 트위터, 페이스북과 같은 Social Network Service (SNS)의 사회적 요소와 게임적 요소를 융합한 서비스로, 소셜 플랫폼에서 동작하며 사용자들의 오락적 유희와 상호작용 관계를 촉진시키고 있다. 국내 SNOG 시장은 현재 빠르게 변화하고 있으며, 급속하게 교체되고 있는 스마트 환경에 따라 빠른 변화가 예상된다. SNOG는 비용적인 측면에서 기존 온라인 게임과 비교해볼 때 경쟁력을 가지기 때문에 더욱 발전될 전망이다. 이와 더불어 페이스북, 트위터 등 해외 SNS 플랫폼 기반 SNOG 서비스와 관련하여 국내 NHN, Daum, SK 컴즈 등에서 개방형 SNS를 선보이면서 SNG 유치를 위한 경쟁이 치열해 질 것이다. 또한, 모바일 연동 기반 서비스와 관련하여 관련 SNOG 개발이 이루어지고 있으며, 관련 국내 인터넷 업체들이 적극적으로 개발 참여하고 있다. 이러한 환경 속에서 본 연구는 SNOG 시장에 비교적 성공적으로 진입한 Nexon 'Maplestory adventure' 사례를 연구함으로써 성공적인 SNOG 요인 분석 및 전략을 정리하고 분석하였다. Maplestory adventure 성공 가능 요인으로는 기존의 인기 있는 온라인 게임에 SNS 접목, 기존의 유저를 통한 marketing, NexonStar 실패요인이었던 Platform 문제 해결 등을 들 수 있다. 이 연구는 이후 계속 확산 발전될 SNOG 성공 전략 문제에 함의를 제공하여 국내 게임산업 발전에 기여할 수 있으리라 기대된다.

## ABSTRACT

The creation and interchange of information through the Internet network forms online community and makes Social Network Game (SNG) as a new entertainment by grafting it onto the most popular online games. SNG means the service which amalgamates social network service (e.g., Facebook, Twitter, etc) strong points and the fun of online game. It promotes the intimacy of relation between the friends above social network service and the gaming amusement for users. The domestic SNG market is currently fast changing according to the smart environment which is quickly shifted. The existing online game field will continuously maintain a market size. SNOG will be more developed because it is competitive from the business perspective of managing cost and production cost when compares with the existing online game. In relation to Facebook, Twitter, etc. overseas SNS platform base SNOG service, the domestic competition for launching SNG is expected to heat up as NHN, Daum and SK Communication introduce open type SNS. This study examines the successful factors and strategy for domestic SNOG by studying the case of MapleStory Adventures successful possibility. The possible successful factors are combing SNS on the existing popular online game, marketing through the existing users, and solving the platform problem of a failure factor of NexonStar. This case study is expected to contribute to the domestic SNOG industry development by providing several implications for the successful factors and strategy of SNOG which will be continuously developed.

**Keywords** : SNG, SNS, SNOG industry, MapleStory Adventures

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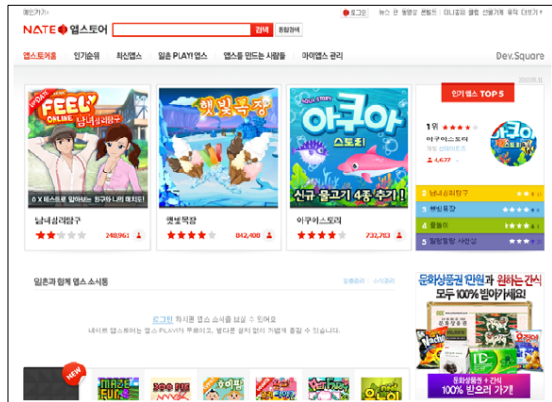
## 1. Introduction

The creation and interchange of information through the Internet network forms online community and makes Social Network Game (SNG) as a new entertainment by grafting it onto the most popular online games. The portable communication apparatus such as smart phone, table PC, etc. leads the expansion of the social relationship which applies mobility and the network. The social connection network formed by online network creates the playing culture which is different from the existing online games mainly characterized by the group activity. SNG in Twitter, Facebook, Blog, etc. means the service which amalgamates Social Network Service(SNS)'s strong points and the fun of online game. It promotes the intimacy of relation between the friends above social connection network[1].

SNG formed by grafting the playing cultural contents onto the social platform<sup>1)</sup> is an online medium of communication which constructs and expands the cyber activities(game play and social relation formation). For example, Facebook and NATE are typical representative SNS platform and app store providing internally and externally SNG as follows:

| App Leaderboard             |            | Developer Leaderboard    |             |
|-----------------------------|------------|--------------------------|-------------|
| Rank By: MAU DAU DAU/MAU    |            | Rank By: MAU DAU DAU/MAU |             |
| 1. CityVille                | 75,391,234 | 1. Zynga                 | 272,204,178 |
| 2. Static HTML: iframe tabs | 51,418,205 | 2. Electronic Arts       | 84,568,385  |
| 3. The Sims Social          | 42,113,987 | 3. Mensing               | 51,418,205  |
| 4. Empires & Allies         | 39,228,589 | 4. Microsoft             | 50,238,468  |
| 5. Texas HoldEm Poker       | 36,366,976 | 5. wooga                 | 40,243,436  |
| 6. FarmVille                | 36,127,670 | 6. Playdom               | 33,944,368  |
| 7. 21 questions             | 31,140,941 | 7. 21 questions          | 31,140,941  |
| 8. BandPage by RootMusic    | 31,012,280 | 8. RootMusic             | 31,012,280  |
| 9. Bing                     | 28,527,011 | 9. Yahoo!                | 22,739,932  |
| 10. Pioneer Trail           | 22,667,931 | 10. 6waves Lolapps       | 20,168,283  |
|                             |            | 11. CrowdStar            | 19,605,758  |
|                             |            | 12. Zoosk                | 18,624,277  |

[figure 1] rank of SNG and developer on Facebook[9]



[figure 2] NATE App Store[10]

SNG is not a new content to people who enjoy the online game as enjoying a game above social connection service. The existing online game grafts social connections onto online games in order to provide the virtual activities, while SNG focuses on the promotion of social connections in order to provide the virtual interaction. That is, SNG focuses on social relationship rather than online game amusement itself comparing to the existing online games[5,6,7].

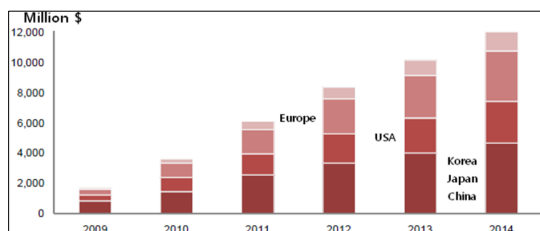
1) The integrated form built up in order to apply user information and the resources of friend relationship for the purpose of enjoying games or other applications in SNS (e.g., Cyworld).

## 2. Theoretical Discussion

### 2.1 Social Network Game(SNG)

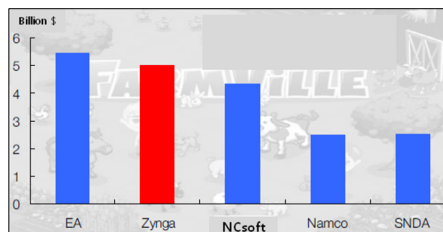
SNG can be defined as a game service which is faithful to social connections relationship[1]. SNG like SNS is to make the relation network which forms connections, but its management plan emphasizes the game activity service instead of the social connections service. Most of SNG is to add the existing online game on SNS service.

SNG diffusion rate is very fast. For example, worldwide SNG market value is presumed as about 0.8 billion dollar in 2010. This year compared to last year, about 25% or more increase is prospective with the fact that will exceed about 1 billion dollar[4].



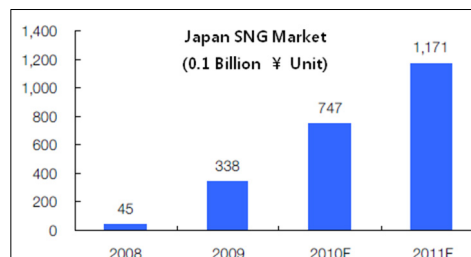
[figure 3] worldwide SNG market change[3]

The worldwide top SNG enterprises ‘Zynga’ started with six people in 2007 and attained the sale of 0.2 billion or more dollars within only two years. The business value of Zynga with 3.3 billion dollars is higher than the aggregate value of listed stock of NCSOFT in Korea.



[figure 4] the business value of Zynga[4]

In case of Japan, the SNG(e.g., mobagetown, etc) size which SNS users create was 33.8 billion yens in 2009. It is presumed that the size will suddenly increase.



[figure 5] Japanese SNG market size presumptions [4]

### 2.2 SNG Quality

#### 2.2.1 SNG Social Quality

SNG has social qualities as follows.

First, users enjoy game amusements in the intimate human relation because SNG fun elements are decided in compliance with user interactions. This is the key point which is distinguished from the existing online game applying interactions under the necessity(e.g., composing party during events)[4,5,6,7].

Second, users can learn and play SNG in a short time because of simple user interface and concise rule. It can become the strong point which draws more latent users into the network.

Third, the existing online game precedes the victory and defeating enemies, while SNG pursues development through mutual cooperation. For example, users get experience points and grow by exchanging gift items and doing side jobs when visiting farm in Farmville of Zynga. That is, SNG has the game structure which pursues cooperation rather than competition[6,7].



[figure 6] a game where you can farm with your friends

Fourth, SNG naturally leads the influx of users through the mutual confirmation of the game contents of a user himself and different users with the information sharing in SNS. This is being located as a SNG diffusion method[4].

### 2.2.2 SNG Game Quality

SNG has game qualities as follows.

First, SNG like MMORPG continuously advances the game through the interactions of users. Thus, SNG provides users with new events or quests and extends the game life through the continuous update[2].



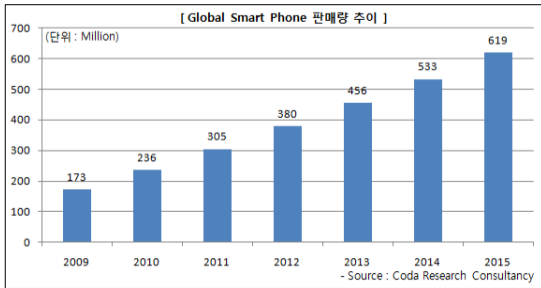
[figure 7] RPG genre SNG

Second, the user interaction happens when users simultaneously connect and play the online game. One particular thing is that the conduct of a user affects different users even when they do not connect and play the SNG at the same time. This game quality indicates that it is not necessary for them to connect to the game for a long time. In addition, it gives a possibility of widening a user base.

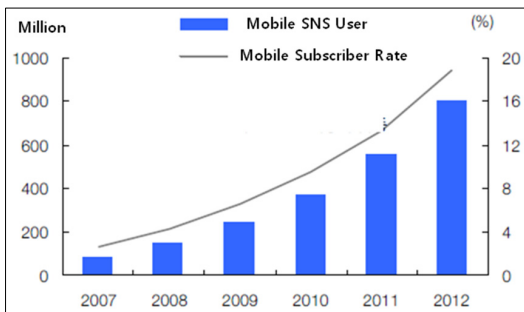
## 3. SNG Developing Environment

The existing online games(MMOPRG, FPS, Sports, Racing, etc) are complex, and users can get good results only after spending much time. However, SNG is simple and appears by releasing the basic instinct about the entertainment and the craving for social networking together[4,5,6,7].

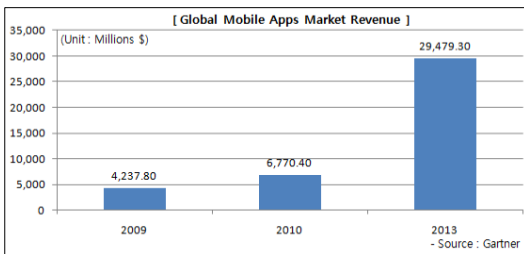
As smart phone becomes one platform where SNG is activated, many people can connect to SNS without regard to time and place. They seek the contents to consume in the mobile connections. SNG satisfies the social needs. Thus, many users enjoy SNG during moving or in a short time because of the quality of SNG.



[figure 8] worldwide smartphone sale volume change[3]



[figure 9] worldwide Mobile SNS users[4]

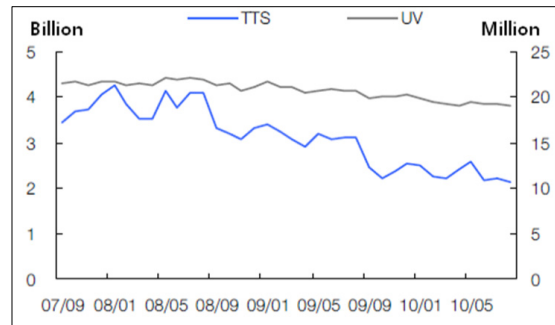


[figure 10] worldwide smart phone game sale change[3]

SNS business owners(e.g., Facebook, Twitter. etc) apply SNG as an important tool in order to raise the network activity.

Cyworld which was enormously popular in Korea became SNS where users' activities fall now. When examines a traffic analysis of Cyworld, Unique View(UV) does not decreases on a large scale, while Total Time Spending (TTS) shows the continuous decrement. For

example, one degree of kinship(ilchon) formation through online expansion of existing offline relationship has made users stay in Cyworld. However, the current services such as Mini room, Guest book, and Photo upload do not give them a fun anymore. Thus, the use time of users decreases.



[figure 11] Cyworld mini homepage UV and TTS [4]

SNG is proposed as a plan to overcome SNS active decrease. SNG can raise SNS activities by providing users with continuous events or missions through interactions with the different users. Thus, a necessity about SNS extends.

#### 4. SNG Type and Trend

When classifies the type of online game with SNS, there are different types as follows; one type grafting online game on the exiting SNS, one type adding SNS functions on the existing online game, one type combining the new SNG on new developing SNS[5].

[table 1] SNG classifications combining with SNS

| Type                                  | SNG Example  |
|---------------------------------------|--|
| SNS + Online Game<br>Sociality > Game | 'FarmVille' Facebook linkage game, Nateon linkage game                           |
| Online Game + SNS<br>Sociality < Game | Nexon 'NexonStar', TreepleStudio 'Project AYU', NCSOFT 'Aion' AvatarBook Service |
| New SNS+New SNG<br>Sociality = Game   | Ngmoco Games provides Mobile SNS Plus+   |

SNG platform types are classified into PC, mobile, table PC, and online mobile linkage base.

[table 2] SNG classifications combining with platform types

| Platform                   | SNG                       |
|----------------------------|---------------------------|
| PC base                    | FarmVille (Zynga)         |
| Mobile base                | Mugeta (KT)               |
| Smartphone base            | Mafia Wars (Zynga)        |
| Tablet PC base             |                           |
| Online-Mobile linkage base | Maplestory Mobile (Nexon) |

The management activity of overseas SNG enterprises is not so long. Many enterprises are established for the development of the new contents suitable for recent smart environments. Now, they propel to develop SNG[6].

[table 3] overseas SNG enterprise examples

| GameFirm         | Description   |
|------------------|---|
| Zynga (Americas) | 2007 July establishment<br>Currently SNG market 1st place sales<br>SNG: CityVille, FarmVille, Mafia Wars, etc |

|               |  |
|---------------|--|
| EA (Americas) | 2007 establishment<br>2009 November first enterprise penetration<br>Undertaking Playfish and Chillingo<br>SNG: The Sims Social, Pet Society, etc |
| DeNA (Japan)  | Ngmoco undertake Mobile SNG enterprise which is famous for SNG 'Mobagetown'  |

The domestic SNG market size does not grow on a large scale because of the limit of the population and the difficulty of globalization.

[table 4] domestic SNG enterprise examples

| GameFirm  | Description  |
|-----------|--|
| Nexon     | Active confrontation in SNG through Nexon USA  |
| NHN       | Active concentration on SNG and smart phone game<br>Opening social applications based on NAVER to the public |
| CJ E&M    | Active investment in SNG fields  |
| Hedgehogs | 2006 December establishment (AhnLab company internal venture)<br>SNG: Catch me if you can on Facebook        |

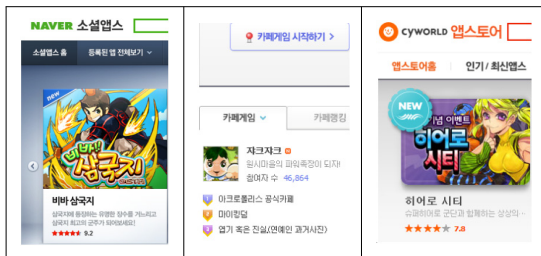
However, the SNG diffusion with mobile Internet activity will give a new opportunity to the SNS platform holders such as NHN, Daum, and SK communication[4].

[table 5] 3 portal companies' SNG services

| Section       | NHN                        | Daum                  | SK Coms                    |
|---------------|----------------------------|-----------------------|----------------------------|
| Type          | Open Market                | Developer cooperation | Open Market                |
| Revenue Model | Advertisement<br>Item sale | Benefit Apportionment | Advertisement<br>Item sale |
| Network       | Me2day<br>Cafe/Blog        | Cafe                  | Cyworld<br>NATEON          |

[table 6] definition of SNG and SNOG

| GameType | Description  |
|----------|--|
| SNG      | A game service faithful to social connection network formation[1]<br>e.g., Farmville                     |
| SNOG     | A game service faithful to online game play with the function of SNS<br>e.g., Maplestory Adventure, Aion |



[figure 12] NAVER Apps, Daum Cafe, NATE Apps

SNOG's developmental plan is as follows.

First, linkage based game portal sites should be developed into the space where users enjoy various games though the online communities. For example, SNOG should provide the service of the community spatial movement of game characters and the social connection formation.

Second, multi platforms linkage SNOG should be provided for the game amusements based on various game platforms(PC, smart phone, tablet PC, mobile)[6].

Third, SNOG should provide SNS, where social side(friend connection and gaming information) is emphasized, and structures amalgamated in online game[2].

## 5. Domestic SNOG Strategic Plan

In domestic game market, the online game which continuously has shown a bullish tendency in development and service will develop the market and advance. In this flowing, the movement which strengthens SNS services in the existing online game will happen.

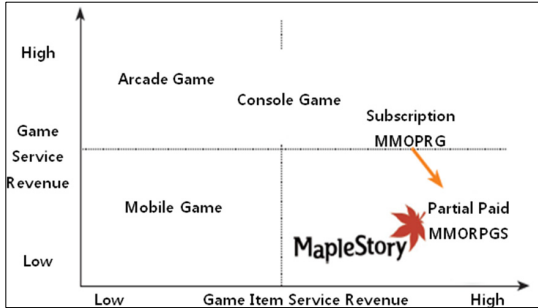
Social Network Online Game(SNOG) is a service amalgamating the online game which is a strong point in the domestic game market and SNS which currently becomes popular in home and foreign[2]. SNOG and SNG are defined simply as follows. However, both games are somewhat similar, rather than completely separate.

## 6. Nexon Case Study

### 6.1 MapleStory Success Factor

MapleStory is an online game which game developer Widget created by admitting the production cost of total 4 billion won. The online game very highly contributes to the internalization of Nexon. MapleStory makes the highest contribution to sales out of 30 online games which Nexon provides. MapleStory success factor is as follows.

First, partial paid business model introduction is a case which exquisitely applies complementary asset<sup>2)</sup> theory.



[figure 13] MapleStory positioning[8]

MapleStory succeeded in achieving a high position from game market by creating the demand about the complementary asset having a differential competitive power. MapleStory can accumulate much more know how in ability developing items and ability advancing the paid system than competitors by introducing the partial paid system in game market for the first time[8]. SNG business model where the basic play is no charge is to sell game items. SNS users who connect to the game by using the mobile device do not reject easily to purchase the game contents. That is, SNG market that early succeeds in encashment is the factor to accelerate a market magnification[4].

Second, MapleStory uses mass market strategy that prefers people of all ages and both sexes to loyal users. The role playing game comprises a complicated manipulation and an unfamiliar game structure. However, MapleStory comprises an easy manipulation and a simple game rule. Thus, it raises an approach to the game from all users. This game quality is equivalent to the quality of

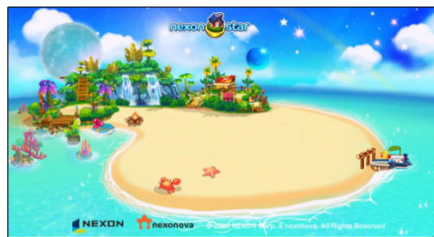
SNG which is simple and came out to release user's desire about entertainment and social networking together

Third, MapleStory's internationalization strategy uses an overseas market advance strategy by synthetically considering the internal ability and the possible disadvantage from establishing enterprise in foreign country.

When the internal ability is high for internationalization, MapleStory builds the direct local corporation in Foreign Direct Investment(FDI) format. However, when the internal ability is insufficient, MapleStory accumulates much know how about a local game market by making partnership contract with a local distribution.

## 6.2 NexonStar Failure Factor

NexonStar is a SNG which Nexonova created and Nexon provided. Online game linkage SNS, Star log, opens the star and house which users decorate to the online public. Users can share all play recorded and information which are accomplished within the game with other users. However, the SNG service was completely ended in 2011 April 28th.



[figure 14] Nexonova NexonStar

2) assets, infrastructure or capabilities needed to support the successful commercialization and marketing of a technological innovation, other than those assets fundamentally associated with that innovation



The Nexon portal could not play a role as a gateway for users who want to enjoy Nexon's contents. NexonStar was planned as an alternative when users stay in Nexon portal and cannot play any game there. It takes the form of the social contents which users lightly enjoy. NexonStar was designed for the purposes that users logging in Nexon make a social relationship and that users who want to simply spend a short time on NexonStar are connected to other game contents which Nexon provides. Furthermore, it was designed for the contents circulation and the continuous social relationship. NexonStar failure factor is as follows.

First, the support of Nexon portal is important to NexonStar being operated on portal platform. Specifically, the support of the existing game studio and the published external games is important. However, the linkage system change to Nexon game contents through NexonStar, the internal trust between NexonStar and other Nexon games are not accomplished well.

Second, the domestic SNS failure factor is due to contents shortage. In general, infinite contents production and active community seem to be possible in SNS. However, NexonStar does not attract users because of insufficient contents. In Korea, users are very familiar to online games. They formed the online community by enjoying the existing various contents rather than by creating contents. In case of NexonStar, just like Animal Forest of Nintendo, narrow inventory, decorative house, the restrictive fatigue system and contents shortage are factors fail to draw the extensive users.



[figure 15] 'Animal Forest' of Nintendo

Third, users form, manage and expand social connections with their friends through Starlog. NexonStar is SNG which adds the social elements on role playing game. However, users can play the game when installs the game program into personal computer(PC). That is, they can enjoy the game on only PC of themselves. Thus, they have to install the program again if they want to play the game on other PC. NexonStar was not sufficient for multi platform linkage base SNG.

### 6.3 MapleStory Adventure

MapleStory Adventures is Facebook SNOG which Nexon develops. The SNOG quality is as follows.

First, there is no health points(HP) in MapleStory Adventures. Instead, user's energy decreases when they are attacked from monsters. However, they can improve the energy shortage through the relationship with friends. All users can recall any player who is registered as their friend once a day because the game provides a recall function. The friend who is recalled assists the hunting of the user as many as energy 15.

Second, users can simply accomplish all functions with one click. All things are solved with one click is very attractive. Game

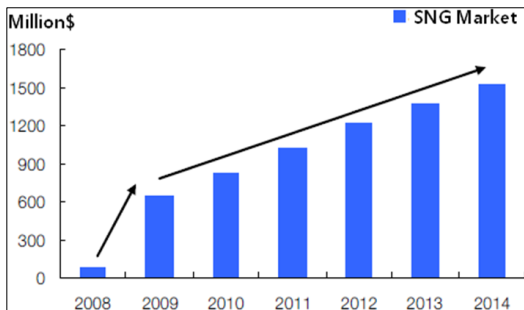
difficulty getting easier and simpler indicates that the age group and the target users come to many.

MapleStory Adventure was developed based on MapleStory which users of worldwide 0.1 billion or more enjoy. MapleStory Adventures which supply fast development and easy manipulation adjusted to Facebook user inclination obtains a big response compared with other domestic SNGs and SNOGs.

[table 7] domestic SNG/SNOG traffic comparison [9]

| GameFirm  | SNG / SNOG            | MAU       | DAU     |
|-----------|-----------------------|-----------|---------|
| Nexon     | MapleStory Adventures | 3,048,756 | 437,027 |
|           | Wonder Cruise         | 5,540     | 658     |
| NHN       | Rich Town             | 591       | 36      |
| CJ E&M    | Netmarble             | 122       | 2       |
| Hedgehogs | Catch MeIfYouCan      | 162       | 5       |

It is not easy that the size of domestic SNOG market grows on a large scale like overseas cases due to the limit of population and the difficulty of globalization. However, the SNG market of the United States suddenly grew and is recognized as one industry.



[figure 16] USA SNG market scale change[4]

Zynga which mainly provides SNG based on Facebook has a 2.3 billion Monthly Active User(MAU). The representative games (CityVille, Empires & Allies, FarmVille) MAU and Daily Active User(DAU) are fairly considerable. The representative game(The Sims Social, Bejeweled Blitz and Pet Society) of different Facebook base SNG service(EA) has also a substantial number of MAU and DAU. On the contrary, the domestic 1st Facebook base SNG, MapleStory Adventures and Wonder Cruise, has a relatively low number of MAU and DAU.

[table 8] internal and external SNG/SNOG traffic comparisons(2011.09.17)[9]

| Game Firm       | SNG / SNOG            | MAU        | DAU        |
|-----------------|-----------------------|------------|------------|
| Zynga           | CityVille             | 75,492,856 | 13,317,122 |
|                 | Empires & Allies      | 39,483,409 | 6,071,805  |
|                 | FarmVille             | 36,033,469 | 7,724,843  |
| Electronic Arts | The Sims Social       | 40,211,274 | 10,675,264 |
|                 | Bejeweled Blitz       | 9,950,186  | 2,698,729  |
|                 | Pet Society           | 8,221,743  | 1,125,384  |
| Nexon           | MapleStory Adventures | 3,048,756  | 437,027    |
|                 | Wonder Cruise         | 5,540      | 658        |

### 6.4 Successful Possibility of MapleStory Adventures

As table 7&8 illustrate, MapleStory Adventures is not popular as much as SNGs of Zynga, EA and foreign developers. However, until now the game shows the quickest upturn of popularity among homemade SNGs based on Facebook. The successful

possibility factors are as follows.

First, MapleStory Adventures is based on the original online game, MapleStory, which has a thick user layer of worldwide 0.1 billion or more. MapleStory Adventures leads the appropriate harmony of SNG and MMORPG by maintaining the original game play and the original story with short game period and interaction of friends, and by including the elements of MMORPG(e.g., item enchant, etc).

Second, when advances the global platform Facebook, Nexon applied the existing awareness of MapleStory. The reason that Zynga's SNG market share is high is owing to marketing of applying the existing users. That is, inviting the existing users into new game instead of attracting new users is most important and strategic successful factor in Facebook base SNG.

When observe synthetically, using Facebook for SNG service platform solves the problem of platform possession enterprise support which was recognized as a failure factor of NexonStar. It got up the good merriment of the existing users by adding new social connections service on the various contents awareness from MapleStory. In case of platform, by executing online mobile linkage service, providing users with a convenient service without regard to time and place is a successful possibility factor for MapleStory Adventures.

## 7. Conclusion

The domestic SNG market is currently fast changing according to the smart environment

which is quickly shifted. The existing online game field will continuously maintain a market size. As a new game territory, SNOG diffusions will become accomplished. It will be more developed because it is competitive from the business perspective of managing cost and production cost when compared with the existing online game. In relation to Facebook, Twitter, etc, overseas SNS platform base SNOG service, the internal competition to lanching SNOG is expected to heat up as NHN, Daum, SK Communication introduce an open type SNS. In case of mobile linkage service, the development of the various SNOG of mobile online linkage style will be accomplished and the relevant Internet enterprise will actively take part in the development. In the game environment, this study examines the successful factors and strategy for domestic SNOG by studying the case of MapleStory Adventures successful possibility.

First, the possession presence of SNS platforms for online game service can be important. In case of NexonStar, the possession of SNS platform was not advantageous to the management of the game. In oversea case, the most powerful SNS service, Facebook and the most popular SNG developer, Zynga caused a complication because both have a different view in a payment way running on Facebook platform. This case shows that game content is very important, but the content without SNS platform is not likely to exist. Thus, the cooperation and restraint between SNOG developer and SNS platform enterprise will continuously appear.

Second, SNOG developer can sufficiently apply the awareness of the existing online game. In the previous case, MapleStory Adventures could obtain a big response from the existing users within a brief period without the mass marketing promotion of Nexon because of the market awareness of the original game MapleStory. NCSOFT plans the fusion of the market awareness of the existing online game and SNS by adding the function of Twitter on Aion.

Third, SNOG developer can provide multi platform linkage SNOG which users enjoy the game on various social platforms. For example, mobile game companies(e.g., Com2us, Gamevil) and online game companies(e.g., Nexon, CJ E&M, JC Entertainment, etc) make inroads into smart phone or mobile linkage SNOG service and magnify the business.

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