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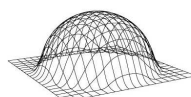
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Another Endless November:
AOL, WoW, and the Corporatization of a Niche Market

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Abstract

The entrance of World of Warcraft (WoW) into the massively multiplayer online role-playing game (MMO) market has drastically altered conceptions of how popular a virtual world could be. Currently servicing over 12 million monthly subscribers (Woodcock, 2008), it has vastly exceeded expectations, and has brought with it more new users to persistent virtual worlds than any other product before it. However, while there has been much academic work exploring developments within the game itself (Bainbridge, 2007; Duchenault, et al., 2006; Castronova, 2007), the processes by which this explosive growth has occurred have been under-explored. The growth of World of Warcraft relative to the MMO market can only be explained via its extrinsic characteristics of the game and how these characteristics interact with processes of standardization and diversification with relative to the market as a whole.

In this paper, I propose that the process that enabled WoW to rise to its current position as market leader amongst MMOs is remarkably similar to that employed by America Online (AOL) in the early 1990's, and that the growth of both firms are evidence of the standardizing influence that a globalizing process such as McDonaldization has when it enters a niche market. The parallels that may be drawn between these cases may be instructive in understanding the future growth of MMOs and other virtual environments.

I will examine the history of the two firms to find evidence of commonalities between them. I will also outline the parallel corporatist models of McDonaldization and Disneyization as proposed by Ritzer (2000) and Bryman (2004). The process by which these firms grew to dominate their spheres will be examined in this context. I will conclude with an examination of what this growth may mean for the future of the MMO industry.

Keywords: MMORPG; AOL; World of Warcraft; WoW; Disneyization; McDonaldization.

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The market for virtual worlds has never been larger than it is right now. Driving this growth has been the proliferation of a particular kind of virtual world, the massively multiplayer online role-playing game (MMO), and the large base of subscribers that they command. Prior to 2004, MMOs were a popular gaming product, yet they still occupied a relatively small niche within the larger digital games market. What changed in 2004 was the entrance of Blizzard Entertainment's *World of Warcraft* (WoW) into the MMO market, and the subsequent paradigm shift that occurred within the industry. WoW currently services over 12 million monthly subscribers (Woodcock, 2008) and has brought with it more new users to persistent virtual worlds than any other product before it.

While there has been much academic work exploring developments intrinsic to WoW itself (i.e. Duchenault, et al., 2006; Bainbridge, 2007; Castronova, 2007), the processes by which this explosive growth has occurred have been under-explored. As WoW does differ significantly from other MMOs with respect to the content provided, it appears that the intrinsic characteristics may be insufficient to explain its rise. The growth of World of Warcraft as the primary choice of consumers in the MMO market has parallels to the rise of other internet-enabled firms, and the growth curve of WoW appears remarkably similar to that experienced by America Online in the the early 1990s. An examination of the historical situation surrounding each product will be conducted, followed by an examination of each of these services as a consumer product in order to understand how extrinsic characteristics of the service can contribute to it becoming a market leader. The parallel models of consumption of McDonaldization and Disneyization as proposed by Ritzer (1993) and Bryman (2004) respectively will form the basis for this comparison. The stages by which each firm grew to dominate their spheres will be proposed, and how in each case the rise of the new model represented a paradigm shift for the old industry. What this paradigm shift may mean for the future of the MMO industry and virtual worlds will be explored. The question is how the degree to which World of Warcraft embodied the processes of a consumerist model such as McDonaldization differentiated it from its competitors, and whether this was sufficient to create the kind of competitive advantage that could achieve this explosive growth.

World of Warcraft: exodus to the virtual

With the announcement of the development of *World of Warcraft* in 2001, Blizzard Entertainment entered a market that was dominated by a number of established firms, including corporate behemoths Sony Online Entertainment (SOE, whose titles included *Everquest*, & *Everquest 2*) and Electronic Arts (EA, *Ultima Online*), as well as industry veterans Mythic Entertainment (*Dark Age of Camelot*) and Turbine (*Asheron's Call*) (Woodcock, 2008). The above titles all had a fantasy theme, which was the most competitive and highly-contested segment of the MMO market. The majority of these were 3D-visualized virtual worlds, providing the user with a first- or third- person perspective. Non-fantasy alternatives did exist on the market at that time: including several which are still active to date such as Cryptic Studios' *City of Heroes*, SOE's *Star Wars Galaxies* and *Eve Online*, produced by Iceland's CCP ht. (Woodcock, 2008). While each of these virtual worlds was able to carve out a respectable niche, none of them came close to the market share commanded by the fantasy games (Bartle, 2003).

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At the time of WoW's launch, the top titles in the North American MMO market were:

- Everquest (EQ): still the largest single MMO in the North American market, with a paid subscriber base slightly below 500,000 users a month (Woodcock, 2008). a fantasy game that graphical features of a 3D game to a multi-user dungeon (MUD) inspired by the DikuMUD code-base (Bartle, 2003). EQ had been the de facto standard in the MMO market since shortly after its launch, and was the benchmark for the industry.

- Final Fantasy XI (FFXI): from Japanese developer Square-Enix also held a sizable user-base, at or around the half-million mark, but some of this was located within the Asian market, which was problematic for reporting purposes. FFXI had been ongoing since 2002, and utilized the traditional 3D perspective of most games in the genre

- Ultima Online (UO): a slightly older game that used a top-down, isometric perspective. Its sandbox style of play was quite different from other MMOs available on the market, and it maintained a steady subscriber base of 175,000 users.

- Dark Age of Camelot (DAoC): shared the 3D perspective of EQ, but provided a realm vs. realm structure for player-vs-player battles to take place. It maintained 250,000 subscribers at the time.

- Everquest 2 (EQ2): SOE's sequel to their flagship game, launched just two weeks prior to the release of WoW and was growing rapidly, peaking at over 300,000 users within 2 months. While it did differentiate itself from its predecessor with new innovations, it also split the user base between two versions of the same product, which was often a recipe for disaster in the computer industry (Chapman, 2006).

- Star Wars Galaxies (SWG): the only non-fantasy MMO with over 300,000 users, SWG was another SOE property, and it was currently wrestling with some post-launch gameplay changes that drastically altered how players interacted with the virtual world.

When looking at subscriber figures, the Korean games Lineage and Lineage II enjoyed higher numbers than their North American counterparts (Woodcock, 2008). However, there may be alternative explanations for their rise (van Rijswijk, 2008). As Raph Koster (2006) details, direct comparisons between the North American and Asian markets are problematic due to differing metrics being used for the reporting of subscriber numbers. For this reason, the focus will remain on the subscriber figures for North America.

Each new entrant to the MMO market brought a number of incremental innovations with it. The features promoted by one company to distinguish themselves from the competition tended to be adopted by its competitors (van Rijswijk, 2008). As a result, a fair degree of homogeneity existed between the various MMOs, as they asymptotically approached an idealized mean. In this regard, the MMOs were little different than other software industries (Chapman, 2006).

Blizzard did not release WoW to the public until November 2004, after a long and well publicized beta-testing period during which some details were leaked to the public. The launch also happened to coincide with Black Friday - the post-Thanksgiving shopping rush in the United States - and Blizzard was able to capitalize on the eager shoppers. At this time the domestic North American market was dominated by the offerings of Sony Online Entertainment (SOE), with three of the top six games (Woodcock, 2008). Within four months of their launch date, Blizzard had weathered *World of Warcraft's* release and the flood of new users during the

holiday season. Despite a few technical difficulties such as the loot-table lock-up (client programs freezing due to massive numbers of players accessing certain files from the server at the same time) and an item duplication bug (slashdot.org, 2005), both of which were handled quickly, WoW now found itself with a user-base equal to that of *Everquest* (Woodcock, 2008).

But while EQ had peaked at the 500,000 user plateau several years earlier, WoW's growth continued unchecked, and this growth did not initially come at the expense of existing titles in the market. EQ's subscriber numbers did not begin to decline until the following year (Woodcock, 2008). WoW's growth represented Blizzard Entertainment bringing in substantial amounts of new users to the MMO market that would not otherwise have participated in it. Other firms that accomplished a similar feat did exist, but not within the MMO sphere: other internet-enabled companies had similar growth patterns during the dot.com era of the previous decade.

America Online: dot.com poster child

While the recent history of America Online (AOL) has been well-documented by authors such as Swisher (1998) and Stauffer (2000), much of the early history of the corporation has disappeared from the public consciousness. Briefly, the company began as Control Video Corporation in 1982, developing a system that would deliver games over telephone lines for the Atari 2600 videogame console. Following the collapse of the console market in 1984 (Wolf, 2008), the company spent the rest of the decade as Quantum Link Corporation providing online services for various computer manufacturers including Commodore, Apple, and Microsoft (Swisher, 1998; Stauffer, 2000). Despite turmoil in the market, AOL managed to survive by being flexible enough to adapt to any platform, allowing it to thrive where larger competitors failed by being reliant on the fortunes of a particular vendor (Chapman, 2006).

The beginning of the 1990s saw the company re-brand itself as America Online, and finish its transition to the personal computer market dominated by Microsoft's DOS operating system. It was in this landscape the modern history of the company began, a landscape already dominated by university campuses, private corporate services, and established firms such as CompuServe and Prodigy (Abbate, 1999). AOL needed to adapt quickly, and soon found a niche within which it could thrive, by beginning an aggressive marketing campaign consisting of the mass-mailout of floppy disks containing the software that would connect users to AOL's services (Stauffer, 2000). Unable to compete on their technical merits alone, AOL innovated in a social dimension by flooding the market with their floppy disks, using novel distribution channels to reach non-traditional computer users and create a ubiquitous brand presence. Shortly after the launch of the floppy campaign AOL began to overtake their competitors, largely due to the double-digit growth that the company maintained throughout the 1990s, which ranged anywhere from 36% to as high as 197% year-over-year (Stauffer, 2000). By 1997 AOL was buying-out its competitors outright, and the market for dial-up internet service was all but locked-up (Swisher, 2003). This growth continued until the end of the dot.com boom in 2001, just months after AOL's purchase of Time-Warner, Inc.

America Online and *World of Warcraft*: comparative characteristics

Based on the previous historical accounts of their rapid growth, a number of common characteristics appear to be shard by the two firms. These include the obvious - such as the online nature of the service they provided, the firm's size relative to their respective markets, and the short time it took for market dominance to be achieved - and those not so readily apparent, such as their business models and the marketing and distribution practices that allowed them to be innovators in their markets.

Both firms had a very similar business model, which can essentially be reduced to providing access to content for a low, recurring monthly charge. The nature of that content is irrelevant to the comparison. Rather, it was the delivery mechanism where they had something in common, creating value from the provision of a service on the internet. Secondly, both AOL and WoW were an order of magnitude larger than their nearest competitor in number of monthly subscribers (Stauffer, 2000; Woodcock, 2008). This is the most obvious indicator of their market dominance. Other metrics, such as percentage share of the market, number of concurrent users, or revenue per user are more problematic when comparing different MMOs (Koster, 2006). Finally, each of the firms went from a new entrant into their market to dominant leader within less than five years. A more thorough survey of explosive firm growth may indicate whether this short period is more prevalent, but at least one other example - that of RCA Victor in the 1920s (Cassidy, 2000) - suggests that this may be the case.

Of the more subtle mechanisms, two similarities stand out. The first is the common price point of under $20 per month. At this price, the firms were able to position themselves as offering the consumer a high-return for the cost, with their unlimited plans comparing favourably against other leisure activities, such as concerts, movie-going or dining out. Finally, it was the non-technical innovations that each company employed, such as the use of mass-mailouts or the leveraging of existing social ties and network effects that contributed to their rapid growth, and not any technological advantage relative to their competitors. The processes by which the firms grew to prominence must be explored.

Processes

The majority of mechanisms which AOL and WoW share are not intrinsic to a virtual world, but rather extrinsic products relating to the service as a consumer product. Firms above a certain size with respect to their market have more in common with each other than with other firms in their market. Evaluating the products of these firms as integrated services in the modern economy requires a framework that can identify these extrinsic characteristics, and the extent to which they have been realized. To this end, George Ritzer's 1993 work *The McDonaldization of Society* provides such a framework.

Ritzer's McDonaldization uses a Weberian framework of control to break down the dimensions by which McDonalds arose to prominence in the mid- to late-20th century. While his original work concentrated on the aspects of the 'brick-and-mortar' business, little attention was paid to the online industries, as the market for them had not yet developed at the original time of publication. Ritzer did revisit his framework to look at online industries in a subsequent work (Ritzer, 2001), and he noted the unique changes that McDonaldization undergoes when 'simulated' or virtual sites are brought into the equation (p.150). However, Ritzer was focused on e-commerce sites such as Amazon.com, 'virtual malls' in cyberspace that 'dematerialized' the process of consumption - most games and MMOs were not recognized as consumption sites, so

the particular characteristics of virtual worlds that are displayed by MMOs went unremarked.

Alan Bryman has extended Ritzer's framework with his "Disneyization" hypothesis that addresses some of these issues (Bryman, 2004), proposing a process that works in parallel to that of Ritzer's McDonaldization. The existence of one does not necessarily exclude the other, as both processes may work in concert within the same corporation at the same time, achieving similar goals of control through different means (p.161). While there is some overlap in the which sites of consumption are studied, particularly with respect to Ritzer's later work, the two processes are attempting to explain different things: McDonaldization's production of goods for consumption via processes of homogenization; and Disneyization's staging of those goods via heterogeneous processes (p. 158). These twin dynamics work in concert to provide a complete picture of the modern dynamics of consumption in modern society. Bryman also explains his desire to leave the door open for other large-scale processes, and it is in this spirit that Disneyization is utilized.

McDonaldization

'McDonaldization' is the term that George Ritzer has used to refer to the corporatist globalizing process "by which the principles of the fast-food restaurant are coming to dominate more and more sectors of American society as well as of the rest of the world" (Ritzer, 2000, p.1). Since the first publication of the book in 1993, McDonaldization has at times been synonymous with the process of globalization, and has often become reified and used as a term of derision without necessarily understanding the root explanations behind it. McDonaldization is fundamentally a Weberian approach to the social aspects of globalization, adapting and extending Weber's core concepts to account for the changes of the post-modern age. For Ritzer, it is the *process* by which McDonaldization takes place that is important, and this occurs along four main dimensions: *efficiency, calculability, predictability, and control* (through non-human technology). The extent to which any given firm may be said to be "McDonaldized" is determined by how much they are optimized along these dimensions (p.19), but McDonalds is by no means the end-point in any of these dimensions. While McDonalds is still the king within the fast food marketplace despite competitors such as Subway, modern exemplars have taken the process to new extremes in other markets. Wal-Mart, the number one retailer in the world (Wiley, 2009), is the most obvious example of a modern McDonaldized corporation (Ritzer, 2001, p. 131).

At its core, McDonaldization's process is one of *rationalization*. The four dimensions of this process are applied in order to homogenize a firm's business methods in a standardized manner. These dimensions are *contextual*: the values that one may attach to a concept like predictability may be different depending on whether one is a customer, an employee, or with management. But there are also trade-offs that occur during the process: when one optimizes for any one dimension (such as efficiency), one often must forgo other concerns. Thus Herbert Simon's concept of "satisficing" often is used in conjunction with elements of McDonaldization.

The dimension of efficiency is the optimum way to achieve a goal. As Ritzer outlines, this is a pathing solution, the way to best get from point A to point B (Ritzer, 2000, p. 12). But this is state-based pathing, and not necessarily geographically related: the customer going from states "hungry" to "full" in the optimum way is an example Ritzer gives on how McDonald's excels (p.12). One of the chief ways streamlining occurs is via a Taylorist model of scientific management, whereby processes are broken down into their component parts, in order to "choose the optimum means to a given end" for each part of the process (p.42). Simplification of the

product occurs, by cutting down the number of options available, or by limiting the choices available with which to interact with the product (p. 55). Efficiency can also be gained by offloading the labour to the customers where the potential exists, citing self-service of all manner of varieties as an example (p. 58).

Calculability is the "emphasis on the quantitative aspects of the products sold and services offered" (p.12). It is the implementation of the Stalinist aphorism: "quantity has a quality all its own", and can be evident not just in the amount of product that a consumer receives, but also the time and costs associated with the good (p.13). Calculability occurs in two dimensions: that of the speed of the process, or in the quantity of the output (p. 62), and Ritzer notes that increasing either of these tends to inversely affect quality. Aesthetic concerns become a secondary factor, when calculability is optimized (p. 71).

Predictability is the assurance that a good will be the same irrespective of time and place. A customer ordering a Big-Mac has a very good idea of what they're going to get (p.13). By creating a predictable setting via systemic standardization (p. 84), predictability allows an aspect of trust to develop between the consumer and firm. By scripting the interactions that occur with customers, the responses that employees are allowed to have, and the products that should result from the process, the customer, firm and employee all can mitigate risk by dissociating themselves from the "process". The 'system' becomes externalized.

Control is the last dimension of Ritzer's model, and the one where his Weberian influences show through most. Control is achieved via the implementation of non-human Technology (p. 14). This is the return to the Taylorist ideals mentioned above, and it works part and parcel with all three previous dimensions. Technological means are used to control the customers, the process, and the product, and those things that can't directly be controlled are minimized as much as possible (p. 110). The main process that can't be controlled is speech, and Ritzer covers some of the technologies released since 1993 that may be able to mitigate even that in his later works (Ritzer, 2001). Ultimately, control is a rationalizing process that allows those in management to claim helplessness to the situation, and both workers and customers to submit to the control in order to obtain the benefits they may enjoy from the other three dimensions. This rationalizing process is the goal of any McDonaldized system. Rationalization is a homogenizing force (Bryman, 2004), leveling distinctions in and between the various dimensions.

Disneyization

Alan Bryman's Disneyization (2004) is a derivative of Ritzer's model, and it outlines a systemic process that works in parallel to Ritzer's own. The need for the parallel model was brought about to explain some of the "changes that are occurring in the service and consumption spheres of modern society (p. 158). Disneyization becomes necessary, as McDonaldization "sits uneasily in an increasingly post-Fordist era of choice," (p. 159). Disney stakes its claim in the service sphere of modern society that McDonald's doesn't address. Much like Ritzer, Bryman's process also occurs across four dimensions: *theming, hybrid consumption, merchandising, and performative labour.* Unlike Ritzer, these dimensions are not as categorically distinct, with some overlap between them. Bryman also abandons Ritzer's concentration on ensuring the dimensions or the process apply to all actors in the system equally, and instead focuses on a narrow set of participants involved in the process.

The first dimension, theming, "consists of the application of a narrative to institutions or locations" that are typically sourced "external to the institution or object to which it is applied." (Bryman, 2004, p. 15) As Bryman notes, the evidence of theming occurring within Disneyland is quite obvious: how theming is actually occurring requires a little more detail. Bryman builds his evidence for the sources of theming from the typologies of two works, that of Gottdiener (2001) and Schmitt & Simonson (1997). Gottdiener had a list of nine "themes" divided amongst geographical locations and social constructions. The Wild West, Arabian fantasy, and tropical paradises coexist with nostalgia, class, and modernism. Bryman is critical of Gottdiener for a number of exclusions from the list (p. 17), and he contrasts this typology with that of Schmitt and Simonson and their list of 'cultural domains' that provides inspiration for themes. Bryman uses these domains to synthesize a list of twelve thematic sources, including Place, Time, Sport, Music, Cinema, Literature, and the Natural World (p. 18).   Bryman also includes the company brand and logo as a theme, and while I will not deny these can be prominent in a given Disney-ized product, they are more relevant to the other dimensions of merchandising and hybrid consumption that follow.

Hybrid consumption is the blending of different modes of consumption by tying them to the environment within which these consumption activities take place (p. 57). It is built on a destination model of retail design, wherein the customer is enticed to an environment and allowed to linger in the presumption that the longer they stay, the more likely they are to break down and begin purchasing. As such, it is strongly linked to Bryman's third dimension of merchandising (p. 81), as an attempt to capitalize on synergistic effects of the marketplace by horizontally extending their potential revenue streams is undertaken. This dimension of merchandising is 'the promotion of goods in the form of or bearing copyright images and logos' (p. 79), and is a specialized form of the generalized franchising process, a distinction that would appear to be more relevant to Ritzer's McDonaldization than here. For Bryman, merchandising is a means by which a firm may maximize the revenue from any one particular piece of intellectual property.

Performative labour is Bryman's final category, and its label may cause some confusion, particularly to those familiar with works of J. L. Austin or Judith Butler. What Bryman means when speaking of 'performative labour' is really Hachschild's concept of 'emotional labour' (1983), in which the employee in an organization "needs to convey emotions and preferably appear as though those associations are deeply held" during the general course of their work for the firm (Bryman, 2004, p. 104). Bryman spends some time detailing the various ways in which this emotional labour may be conducted in modern consumer settings, including the hospitality industry, modern retailers, airlines, and even McDonald's itself. Bryman notes Hachschild's belief that emotional labour is a net negative for both the workers and the customers, but Bryman considers it irrelevant to the larger process at hand.

Critique of Disneyization

While at first glance the model of Disneyization that Bryman proposes appears to provide a solid framework by which to analyze a prospective corporation or brand, it lacks several of the qualities that Ritzer's original formulation provided, including depth, generalizability, and breadth or completeness. With respect to *depth,* where Ritzer's work looked at the effect of his process on all actor's involved in the system - including the perspectives of the consumer, the worker, and management - this multiplicity of viewpoints is largely absent from Bryman's work. While Bryman provides examples where each dimension may take place, this is indicative of the breadth of the industries across which the process of Disneyization is deployed, as opposed to how deeply any single given industry may be Disney-ized.

The second missing quality is *generalizability.* The dimensions given by Bryman are narrowly defined and tightly constrained, to the degree that the utility of his model is limited to explaining the particular thing (Disney) that Bryman wants to explain, and little else. Additional work is required to employ Disneyization as a model outside of its original   context. Disneyization's final missing quality is *completeness*, and this is most noticeable in the categories of hybrid consumption and performative labour, where the dimension that is defined by Bryman is quite different than what the label would suggest. In the first case, what is presented as 'hybrid' appears to be simply 'geographically bound' and 'horizontally integrated', neither of which are particularly novel.   In the case of performativity, a switch occurs as the reader is presented instead with 'emotional labour', which while important, is only a small component of the larger concept of performativity and not representative of the theory as a whole.

The strength of Bryman's model is that he still managed to capture what was occurring within Disneyland. Both consumption and performativity are dimensions that should be part of the process of Disneyization; it is just the particular definitions used which simply need to be more inclusive and generalized, and this may be accomplished by engaging the relevant literature underlying the assumptions made for both these dimensions.

Extending Disneyization

The best way to reconcile Bryman's process and bring depth and generalizability to Disneyization would be to reject the narrowly defined notions of 'hybrid consumption' and 'performative labour' and fully embrace the larger literature of both consumption and performativity. For the first of these, Holt's typology of consumption practices (1995) provides a useful model. Dividing consumption practices by both the purpose of the consumption and the structure in which it occurs, Holt allows for various consumptive activities to be situated relative to one another in a typology, wherein Bryman's 'hybrid consumption' is an instance of Holt's 'consuming as experience'.   Metaphoric and symbolic associations are utilized during the consumptive act to allow for sense-making to be conducted by the consumer. Holt's other forms of consumption - integration, play, and classification - can extend 'hybrid consumption' beyond the narrow definition that Bryman provided.

With respect to performativity, Loxley (2007) builds on the work of Austin, Butler, and Goffman, and notes that what is considered "performative [...] appears to focus a valuable but not too difficult idea, detachable from the circumstances of its formulation without significant loss and usefully applicable to a wide range of differing intellectual challenges or problems" (p. 2). It is for this reason that the broad definition of performative is being appended to Bryman's

restricted one. Citing Austin, Loxley notes that performative means that "words do something in the world" where "linguistic acts don't simply reflect a world but that speech actually has the power to *make* a world" (p. 2, emphasis in original). Loxley also notes the ties performativity has with Goffman's work, in which roles "form the basis for the ways in which we navigate round our social world" (p. 151).

Evaluating AOL

An analysis of AOL reveals how it best exemplifies Ritzer's concept of efficiency in the relative simplicity of the interface provided, with a limited selection of choices available to the user upon launching the service, presented with large, easily delineated 'buttons'. The use of experienced users as 'guides' (Stauffer, 2000) provided the new user with a point of contact when faced with the unfamiliar software. The AOL software was also very predictable from the standpoint of the customer. Outside of major version changes, the user was presented with the same layout and experience each time the program was started. The only unpredictable component of using AOL was the connectivity issues that plagued them early in the company's history when demand exceeded capacity and the firm was struggling to keep up with explosive growth (Stauffer, 2000). Though the user may find something 'unique' online during any given session using software, this does not count against the predictability of the software and service itself. The calculability of AOL can be seen in the flat-rate monthly fee for the service adopted in 1996 due to market pressure from competitors. The customer was able to know ahead of time how much the service would cost, and earlier per-minute and per-hour charges that made budgeting an issue were no longer required. Moreover, apart from localized versions, the service was the same regardless of where geographically the service was used. Aspects of control via technology that manifested in AOL include control usable by the customer, such as privacy settings, parental block lists to safeguard children's surfing, and e-mail filtering programs. Control was also a tool available to AOL as a corporation, including IP address logging, usage-monitoring, and restrictions on the availability of certain newsgroups (Stauffer, 2000) and it was the information that AOL was available to gather by data-mining their customer usage statistics that was one of the factors leading to its high stock valuation (Swisher, 2003).

AOL minimized the number of options available to their customers, but they still existed to some degree. Theming was relatively minimal, aside from look and feel distinctions between different areas of the software. The most prevalent aspect of theme was that of the AOL brand itself, which Bryman considers its own separate category. Given how inextricably linked this is with consumption and merchandising efforts, it is best to deal with all three at once. Hybrid consumption existed primarily though treating AOL as a virtual 'site' or destination (Benedikt, 1991) through which other consumptive activities could take place, such as shopping and accessing media content. Merchandising was available, but these branded products tended towards 'logoware' and other ancillary products. The most common AOL merchandise was the installation floppies and CDs that the company used for promotional purposes (Stauffer, 2000). Performative labour occurred in the customer service area, but it was the expanded notion of performativity that was available in abundance, and the AOL customer could exercise a wide variety of options to construct an online identity (Turkel, 1995), from the choice of username, to participation in official online virtual realms such as Neverwinter Nights, or AOL's unlimited access to Usenet and its own internal forums (Raymond, 1996).

Evaluating WoW

When applying Ritzer's and Bryman's processes to World of Warcraft, we see a quite different pattern emerge. This is due in part to the differences of MMOs relative to the e-commerce sites that Ritzer (2001, p. 150) and Bryman (2004) focused on, and partly due to the differences between WoW and other titles in the MMO market. Beginning with Ritzer's dimension of efficiency, there are a number of intentional design choices which contributed to the streamlined feel of the game. These include the use of a single dual-use disc for distribution, servicing both the PC and Mac user-base. By 2004, the Macintosh represented a sizable fraction of the computer market, especially amongst home users and college students. The low system requirements relative to its direct competitors - where the trend was to larger, more graphics-intensive games, as seen with its contemporary EQ2 - allowed Blizzard to target the largest potential market. Ritzer's notion of limiting choices comes up again in the race and class selection as the 8 races and 9 classes available at launch were significantly less than their nearest competitors. (EQ2 had launched 2 weeks prior with 14 races and 24 classes). Ritzer's notion of "putting customer's to work" (Ritzer, 2000, p.44) didn't involve busing tables, but can be seen in 2 ways: foremost among these is the guide program, in which volunteers provide low-level service jobs such as tier 1 tech support for the MMO company. Additional forms of labour can be seen in guild system itself (Duchenault, et. al., 2006; Silverman and Simon 2009). Blizzard offloads a large amount of human resource management as guilds self-organize to the aim of completing the content that is provided by the developers. Any attempt to quantify the real-world value of this virtual labour can be problematic at best for a variety of reasons (Castronova, 2007).

WoW is also McDonaldized in Ritzer's dimension of calculability. Chief of these is the extrinsic variable of the fixed monthly cost. A player of WoW is aware up-front of exactly how much usage of the service they have available. In this respect, WoW is no different from the other major MMO titles at the time of its release. Intrinsically, the game is quite explicit about the information available to the user. In-game items provide DPS (damage-per-second) numbers for every weapon in the game, in-game quests are undertaken with full knowledge of the reward available for completion, and integrated quest-tools created by third-party publishers can trivialize their undertaking. WoW also diverged from other 3D games by providing a real-time in-game mini-map, previously seen in isometric games such as UO, and floating icons representing the status of NPC agents relative to the user. This in-game knowledge reporting represented a significant shift from the trend in the industry since its inception - where much of the detail of the game was obfuscated from the user, whether for reasons of verisimilitude or competitive balance. The net effect of this hidden information was to increase the learning curve required to play the game, and this time investment made it unattractive to large segments of the digital game market. There is one manner in which WoW directly contradicts Ritzer's calculability: aesthetics are not taken for granted within the world of Azeroth. There is a very strong and consistent style that carries over in all aspects of the game, from the user interface to the in-game artwork. Aesthetics are such a strong component of the WoW's experience that the degree to which WoW is McDonaldized in this dimension is minimized.

The dimension of predictability is also manifest within WoW. The extent to which a player is able to optimize for certain occurrences within the game, and make allowances for small degrees of random variation speaks to the high degree of predictability in-game. One of Ritzer's key components of predictability was the presence of scripted interactions, and while this is used heavily within WoW, it is also true of the entirety of the MMO market. Automated

agents within the game are the primary way story, plot and quest information is distributed to the customers. These non-player characters (NPCs) give out quests, provide information, clues, and rewards, and provide essential in-game services, such as travel, food, item repair, and skill advancement. All are entirely automated, all act without the need for human oversight (beyond the original programming), and all are beyond the ability of the players to deviate from the script. (Blizzard allowing NPCs to be targeted and slain within the world PvP that exists in WoW is one of the few ways that one can go outside the script, and even this is achievable only through a narrowly constrained set of conditions). The automation allows for the MMO genre to achieve in the virtual a level of control over their agents scripted interaction that far exceeds anything achievable in reality by a McDonaldized company. As Ritzer notes: "In fact, such sites [cyberspaces] represent something approaching the ultimate in McDonaldization" (2001, p.149). This 'ultimate McDonaldization" is realized in the degree of control that manifests in the scripted interaction that players have within the game itself. Foremost of these is the reporting function within the game, by which a player can report objectionable language, behaviour, or conduct. Blizzard again offloads the labour to the customer, this time the labour of social control, turning the entirety of WoW into a surveillance society where non-normative actions may be rationalized, or excised completely (Silverman & Simon, 2009). Here again, WoW does not diverge significantly from the rest of the MMO market.

Turning now to the modified dimensions of Bryman's Disneyization, the dimension of theming is available everywhere within WoW. While WoW has followed the lead of Asheron's Call in moving to a seamless virtual world uninterrupted by zoning or loading screens (save for during specialized fast-travel or personalized pocket dungeons or 'instances'), the visual and auditory distinctiveness of each particular in-game area contributes to the strongly-themed feel that exists throughout the game. As with the control dimension above, WoW is not being singled out from the MMO market for special attention here, as a similar list could be provided for every major MMO. There is a high degree of similarity in themes that occur across various MMOs in their implementation of thematic elements. Themes such as the tropical paradise, the Wild West, the encroachment of technology, deserts or Arabian Nights, and elemental realms of fire, ice, and water are obvious in most of these games. Why the prevalence of themes in MMOs? Bryman notes that "theming provides a veneer of meaning and symbolism to the objects to which it is applied." In a world in where all interaction is symbolic, theming provides a method of interaction that is easily knowable to the consumer (Minsky, 1984). It also allows the designers of a virtual world a shortcut to providing the massive amounts of content required to occupy and retain their customers. In effect, theming becomes 'content for free'. This does not mean to suggest that no work is done to create it; it simply implies that much of the heavy lifting can be diffused by relying on a well-known theme.

Examining WoW with the expanded dimension of consumption reveals how multi-faceted the dynamic of this process within WoW really is. There is an intrinsic/extrinsic split in the location where the consumption occurs. Intrinsic consumption is that which occurs within the game, and this is further split between that of virtual goods and the game 'content' itself. Extrinsic consumption is that of goods that are external to the virtual world of the game. One of the manners this occurs is merchandising, which Bryman treats as a separate category, below. The intrinsic act of consumption is a heavily-integrated component within WoW. NPC scripted-agent sales-avatars and the mercantile goods they represent are everywhere. A further part of this consumption is the heavily-stylized animations that occur with the avatars use of consumable items within the game, including the use of virtual food and drink, and the drinking of potions to achieve various in-game benefits. Within WoW, consumption is more than desirable, it is *necessary*.

One of the game's major innovations in the consumption dimension relative to the MMO market   was the auction house. This was a point of divergence from the 'bazaar' model that was prevalent in MMOs at the time, as typified by the vendors of *Ultima Online* and the Bazaar zone of the original *Everquest.* The formal integration of in-game tools to facilitate trade arose from the social innovations that the players of those games undertook to enable trade in the game, providing an example of user-led innovation (Von Hippel, 1987), including marked runes in UO and the 'neutral ground' of the Commonlands tunnel in EQ. WoW changed the dynamic of how player's interacted with virtual goods and each other within the game (Bartle, 2004), by incorporating an eBay-like dynamic with short-term lengths and buyout pricing which served to entice participants to check back regularly.

Bryman's dimension of merchandising is closely linked with consumption, but prevalent nonetheless. It is fairly obvious: there exists a wide variety of branded goods, and Blizzard has been Lucas-like in their amount of WoW branded products available. Goods and services exist to either facilitate game-play (i.e. the subscription to Blizzard to provide the service), or facilitate interaction with other players (e.g. tickets to Blizzcon, or additional consumer products).

Hardcover atlases and art books, licensed fiction and comic books, computer peripherals, action figures, and more all exist for the WoW devotee. There has also been horizontal integration of the WoW brand within the gaming marketplace, with WoW-themed board game, an adaptation of WoW using the Open Gaming License (OGL) (Wizards of the Coast, 2004) of the 3rd edition of Dungeons and Dragons, and a collectible trading-card game (CCG) that featured cards that could be redeemed for in-game tokens and rewards, such as mounts and cosmetic goods, showing a level of synergy between the virtual and material worlds that had not existed prior. Unlicensed, third-party products can benefit from an association with the WoW brand as well. Websites discussing WoW can see a benefit from increased traffic, and other third-party services include commissioned character portrait work, game guides and atlases, and customized plastic figurines.   While SOE had also pursued extrinsic licenses products and hosted the *Fan Faire* convention, the scale to which Blizzard leverage WoW as a brand was unseen in the MMO market.

The final dimension is that of performative labour. With the expanded definition of this category, performativity occurs in two ways. Bryman would likely concentrate on the work that is conducted by the customer service employees and guides within the game itself. Indeed, this kind of labour has been present within the MMO field since its inception, from the appearance of the operators of early MUDs as 'Wizards' within the game, to the guide programs, volunteer or paid, conducted by most modern MMOs (Bartle, 2003). However, WoW is hardly the exemplar within the field in this area. That distinction would likely go to the recently closed Matrix Online (MxO), which had paid actors using avatars in game to lead events and story-lines. This practice was discontinued relatively early on, and by the closing of MxO, the role was filled entirely by volunteers.

MMOs expose the how shallow performative labour was as a concept in Bryman's original proposal. He made no allowances for the performativity that is conducted by the customers themselves (Turkel, 1995). As a RPG, WoW provides the customers a wide latitude in constructing an identity for themselves. The roles that a given player may engage in vary depending on context, whether it is the roles dictated by game logic within a small group or raid, the roles that may be imposed socially, by guild, faction, group, or extrinsic factors (friends, family, gender, etc.), or the roles that one may undertake of their own volition in both intrinsic and extrinsic situations (Williams, et.al., 2006).

Parallel Processes: Homogenization v. Heterogeneity

Pictures a 2x2 matrix: one side is marked with the processes of McDonaldization and Disneyization, operating in parallel in different market segments which are marked on the other axis. McDonaldization represents a process of increasing homogenization of a given firm with respect to its market; Disneyization represents increasing heterogeneity of the product. In the real-world sector, the namesakes of each process stand as representative of their category. As Bryman (2004) has noted, the boundary between the two processes is *porous*: both McDonald's and Disney has elements which can be best explained by processes in the other stream. However, the overall *trend* for each firm is to be in the stream named after them. Given this, we can look to some modern exemplars of the processes: those firms that have taken the original processes to new heights, surpassing the namesakes in some (or all) of the dimensions. Wal-Mart has taken the rationalization processes of McDonald's as far as allowable in the retail sector. (Fishman, 2006; Hicks, 2007). Similarly, Las Vegas is the modern expression of Disney; a playground for adults who grew up with Disneyland as a vacation destination. Bryman (2004) notes the ways it which the modern casinos are emblematic of the Disneyization process: theming occurs in each different casino complex; hybrid consumption occurs everywhere (indeed, the entirety of the strip is one giant zone of consumption); merchandise is also available everywhere, and all of the 'front-facing' labour in the entertainment complex is performative. But Ritzer (2001) notes how casinos operate in a McDonaldized framework at the same time, suggesting that Las Vegas lies closer to that porous boundary between the two streams. On the horizon, Dubai could also stake a claim to being a modern exemplar of the Disneyization process. And while both Wal-Mart and Las Vegas have taken the process to new heights in their respective spheres, this by no means suggests that either McDonalds or Disney are no longer relevant in theirs.

Extending both streams into on-line realm, both AOL and WoW become the exemplars of the cybered versions of the processes. While both Ritzer and Bryman look to cybered analogues of malls and casinos such as Amazon.com as emblematic of dematerialized consumption, they neglect games as one of these potential sites. Within the online realm, firms such as Google may be singularly dominant within their respective spheres (and indeed, several authors have commented on the Google-ization of various spheres (Mckay, 2009)), but AOL and WoW both represent the two-sides of the Ritzer-Bryman dynamic by virtue of the similarity of how they extract revenue from consumers: the monthly billing of customers for unlimited access to their service.

Market Dominance

Both AOL and World of Warcraft came to dominate their respective markets within a remarkably short amount of time. Both utilized elements of homogenization and heterogeneity found in Ritzer's and Bryman's parallel processes. Yet despite the differences in both the companies and their markets, the steps that were undertaken by each firm were remarkably similar. Recalling the histories of the rise of each product, four stages in which these steps took place are apparent. Each successive stage leveraged the results of the one before to produce a mutually-reinforcing system that developed and sustained growth, leading to the firms' eventual market dominance. These stages are not meant to emulate Ritzer's and Bryman's models - which outline the dimensions over which a process occurs - but rather provide an overview of the steps that occurred during the firms' respective rise. The stages of the process are simplification, saturation, engulfment, and establishment, and they occur as follows:

Simplification is most evident in the technical requirements of a given product. It evokes McDonaldization's notion of efficiency and predictability at every turn, providing a carefully constructed user-experience to the largest extent possible. This is evidence of a strong intentionality in the design process (Feng & Feenberg, 2008). AOL provided a simple and accessible interface that obscured the technical details of connecting to the internet, and provided a consistent graphical interface. WoW maximized its market by lowering the technical requirements relative to its competitors, and allowed Mac users to play simultaneously with those playing on Windows systems. They created a highly stylized artistically rendered game-space, and also simplified the user interface, hiding much from novice users to facilitate easy play wherever possible. For both AOL and WoW, this stage was illustrative of Borgmann's "device paradigm" of technological interaction (1984).

Saturation is the next stage, and where the largest innovations by both companies took place. They both saturated the target market with tactics that were novel in their respective spheres. Disneyization's elements of consumption and merchandising begin to come into play here. The leveraging of social ties and cheap distribution allowed for a mass of potential new customers to easily access try their product for the first time. WoW leveraged their existing customer base to bring new participants to the MMO market. These new users found the simplified system created in the first stage, and this enabled a high level of retention of new users to occur.

Engulfment is the stage wherein the high level of retention from the first two stages combines to achieve explosive growth, due to factors from Bryman's performativity and Ritzer's calculability. The extrinsic factors of the first two stages fall away and factors intrinsic to the product itself start to dominate. While no-one begins playing WoW with the goal of slaying Onyxia, this may become an intrinsic motivation once the virtual world is engaged with. As consumers decide they are getting good value for the money, and in-game social ties become stronger, the engulfing firms can mitigate the customer turnover or 'churn' that most firms in their markets experience. By continuing to engage in the saturation practices of the second stage, player retention allows new growth of the customer base to become additive, and not merely just a replacement of departing users.

Finally, we come to *establishment*, where the firm comes to represent not just the majority of users within their respective markets, but also the first point of reference for many of these users. The product becomes the measure by which all competition within that market is judged - even historical antecedents come to be seen via the new lens. A Kuhnian paradigm shift has occurred within the respective spheres, and the brand name of market leader comes to be assumed as representative of their market or class of goods. Just as the iPod is symbolic of the portable mp3-player market, for a time in the mid-1990s, AOL represented the dominant paradigm with respect to internet usage (Swisher, 2003); for MMOs, World of Warcraft is the dominant paradigm.

Virtual Worlds under the WoW Paradigm

The implications of the paradigm shift in virtual worlds brought about by WoW's growth model can be seen in three key areas: the niche market that MMOs were prior to WoW's launch; the trend towards standardization and interoperability amongst MMOs; and the change in alternative business models and revenue streams.

In 2004, Everquest was king of the MMO market with 500,000 subscribers. Even with the large number of titles (Bartle, 2003; Woodcock, 2008), the total user-base for MMOs was only a fraction that of other video games. With WoW's release, the market expanded outside its traditional niche. New players were introduced to MMOs and virtual worlds from Blizzard's other titles. Macintosh users, with their large presence within the college community, finally had a viable MMO option that was native to the Mac OS and interacted with the rest of the user-base. A parallel may be seen with AOL's opening of Usenet to its users in 1993, the infamous 'September that Never Ended' (Raymond, 1996). While a number of Usenet groups were able to weather the storm of an influx of new users and maintain their niche within the larger internet, many were lost. It remains to be seen whether the users that WoW brought to the MMO market are will remain as consumers of other MMOs and virtual worlds, or if WoW's entrance into the market represents a November that never ended for the MMO market, with the bulk of new users drifting off for different pursuits over time?

The second implication is one of standardization and interoperability. Standardization within the MMO market appears to be occurring not through an explicit process with a governing body, but via emulation and iteration. New MMO releases since 2004 have tended to mirror WoW in user-interface, on-screen layout and other design aspects, in order to attract WoW's current customers and prevent them from rejecting their offering for diverging too far from the genre conventions they are used to. As noted above, WoW represents the first experience with MMOs for many of its users, and so defines expectations those users have about virtual worlds products. The gravity of WoW's mass within the marketplace becomes a lens through which all customers expectations are filtered.

Similarly, cross-MMO interoperability is some ways off yet. One of the side-effects of AOL allowing its users to cross its borders to the internet at large was the necessity for AOL to seamlessly deal with the technological systems that were already in place. There are already signs of this occurring around the margins in the MMO market, with innovations such as Sony's Station pass providing access to any game within its stable for a single monthly fee. Other interoperability initiatives such as the OpenSim project (Linden Labs, 2008) or the MPEG-V standard may provide a key alternative, but as capital is always a standardizing influence, new business models and revenue streams in the MMO market may have a greater say indicate where the future really lies.

While WoW may be the dominant MMO player today, it could be the last of its kind, the largest of those charging a monthly fee for access to its servers. Already in 2009, free-to-play MMOs supported by alternative revenue streams such as advertising, retail, or micro-payment based models are on the rise (*Free Realms*, *DDOnline*) . Other models, such as lifetime subscriptions (as seen with *Lord of the Rings Online*) or community supported play on free servers may also find an uptake (Lees, 2006). Micro-payments by necessity require a means to handle the funds being transferred. Once this is in place, what is being transferred is less relevant. The effective market size of the MMO is restricted not by the user-base of one title, but of all titles using that model (Krugman, 1997). If multiple virtual realms are all using the same system, then the micro-payment will become a predictable, calculable and efficient resource, a homogenizing force that influences the shape and growth of those MMOs that utilize it.

This is not to suggest that such a change would spell the doom for the World of Warcraft. Blizzard Entertainment's stewardship of its title has been remarkably sure-footed, and any issues have been dealt with quickly and professionally. If a sea change does occur within the MMO industry, there is no reason WoW could not change with it. It may prove resilient to any underlying currents in the water, unlike AOL, which misread the signals of its industry and foundered (Swisher, 2003).

Conclusion

The aim has not been to suggest that World of Warcraft is the McMMO, but rather it was the MMO that was most heavily McDonaldized relative to the market at the time of its launch in 2004. The aspects of McDonaldization which WoW evoked - promoting efficiency via a simplified and intuitive UI, communicating more information about the world to the player to create a more calculable and predictable experience - all contributed to WoW's success. Using these methods, Blizzard was able to provide a relatively consistent and homogeneous experience across the WoW user-base, and this consistency contributed to WoW's explosive growth. Arguments that the user experience of WoW is radically different depending at the stage of the game the user is at are not without merit; however, despite how the user is playing the game - be it as a new user, a player heavily involved in PvP, or in an end-game raiding guild - there is an internal degree of consistency to the user experience within these phases.

Nor am I suggesting that WoW is CyberDisneyland incarnate: all MMOs are Disney-ized versions of Benedikt's (1991) cyberspaces to some extent. WoW simply evoked the key characteristics of this Disney-ized model better than its competitors at the time, whether it was by distinct thematic ties throughout various locales in the game, performative aspects of play on display via PvP play, or hybrid consumption and competition via the auction house mechanics. Several newer MMOs such as *Free Realms*, *Disney's ToonTown Online*, *Hello Kitty Online*, and *Lego Universe* emphasize the Disney model of controlled heterogeneity to a greater degree than WoW attempted. Whether these will be successful in their endeavor remains to be seen.

Ultimately, it is these two parallel processes that led WoW, as with AOL before it, to achieve dominance in its market via four stages that could be grouped as "AOLification" or "Wowification". Intrinsic features may retain a customer, but it is extrinsic and often social reasons by which these customers are engaged in the first place. As WoW is the first point of exposure for the vast majority of all players of MMOs and virtual worlds, it is now the *de facto* reference point for any and all discussions involving the subject. The features and play-style of this MMO have become the *lingua franca* of the field, and future development becomes predicated on its models, until another homogenizing force provides a new paradigm to the field.

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