

**MARIO VERSUS THE LICH KING:  
How Culture Affects American Consumers'  
Preferences for American or Japanese Video Games**

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## **ABSTRACT**

In order for the American video industry to continue to grow and attract more American and international consumers, it is vital to understand which attributes of video games are most important in determining consumers' purchasing choices, and it is equally important to know how cultural and social values contribute to these norms. My primary research goal is to determine which video games American consumers most often prefer, why do they prefer them, and what underlying cultural attributes affect these preferences. To answer these questions, I grounded my research in historical context, analyzed sales statistics from credible online resources, conducted two extensive surveys of American video game consumers, and used widely accepted theories about Japanese and American culture to interpret this information. I found that Americans prefer multiplayer games whereas Japanese players like single-player games, and American consumers can be broken down into four overlapping categories with distinct preferences. From these results, I concluded that culture and social structures do affect consumers' video game preferences to a degree, and that American consumers can be further broken down based on gender and play style.

## INTRODUCTION

The original purpose of my thesis research was to find out why some American video game players prefer Japanese games over American games and how I could exploit these findings in an original game design. Over time, I became more interested in the social and cultural reasons consumers like American or Japanese games, different genres, or respond to different play styles like multiplayer versus single-player. Preliminary research into the history of the American and Japanese video game industries led me to appreciate the economic as well as cross-cultural exchange that the international video game market facilitates between Japan and the United States.

After more than a year of spontaneous and planned research, the purpose of my Senior Honors Thesis has matured into the following goals: to understand the historical and economic context of the American video game industry in its present form; to analyze the preferences of American video game consumers and, to a lesser extent, Japanese video game consumers; to interpret these preferences in the language of socio-cultural theories; and to condense this knowledge into design recommendations that will effectively target a broad range of American video game consumers.

I began my project with historical research. My primary sources were two books: *Supercade: a Visual History of the Videogame Age, 1971-1984* by Carl Steadman and *Game Over: How Nintendo Zapped an American Industry, Captured Your Dollars, and Enslaved Your Children* by David Sheff. *Supercade* begins with the earliest scientific inquiries into video game technology and ends just after the industry crash of 1983. Sheff's intrusive history of the Nintendo company picks up where Steadman leaves off, detailing the Japanese giant's entrance into the American market and its rising success through 1992. In conjunction with online research about video game history after 1992, these books gave me a firm grasp on the industry from its conception to its present state. The first section of my thesis gives a concise overview of this information in order to establish the historical context of my research.

The second section presents sales statistics from a reliable market research website, VGChartz, that illustrate the difference between the success of multiplayer and single-player games in the United States and Japan. I present possible theories as to why Americans, who are primarily Western individualists, favor multiplayer games while group-oriented Japanese consumers prefer single-player games. These theories attempt to explain these surprising statistics in terms of socio-cultural research.

The next two sections focus on the results of two surveys I conducted using an online survey engine called SurveyMonkey.com. The first survey looks at the overall American video game consumer

population to determine which discreet attributes of video games most strongly affect their enjoyment and purchasing decisions. I point out several significant findings and attempt to explain social attributes of American and Japanese cultures that may contribute to these cases. The second survey breaks down the American video game consumer population using demographic data in order to see how factors such as gender, playtime, and console availability affect gamers' consumption patterns.

The final section describes an ideal game based upon the results of my surveys and cultural analyses that would most effectively appeal to the largest possible number of American video game consumers.

I would like to point out that the research and analyses presented in this paper are preliminary in nature and do not represent final and concrete conclusions.

## A BRIEF HISTORY LESSON

In order to understand the current international video game market and the state of the American video game industry, it is vital to have a rudimentary knowledge of the history of video games, especially concerning the emergence of Japanese companies as the dominating powers in the American industry.

Below is a basic timeline of video game history, from its earliest forms to the present (Kudler):

### Video Game History Timeline

1958	First "video game" invented by Willy Higinbotham on an oscilloscope
1961	Steve Russell invents first interactive computer game, called <i>Spacewar</i> , at the Michigan Institute of Technology
1967	Ralph Baer and team create the first interactive TV game, which Magnavox licenses
1971	<i>Computer Space</i> , modeled after <i>Spacewar</i> , becomes first video arcade game
1972	Magnavox releases first home video game system: the Odyssey
1975	Atari releases the smash hit <i>Pong</i> home console
	<b>Golden Age of American Video Games begins</b>
1976	Debut of Channel F, the first cartridge-based home video game console; from now on, the same console can play games that are not directly programmed into it
1978	<i>Space Invaders</i> introduces high score tracking on arcade machines
1980	Activision becomes first third-party developer for console games
	Namco releases Pac-Man in the US
1983	Cinematronics releases <i>Dragon Lair</i> , the first laser-disc video game

	Commodore 64 is released
	<b>Industry Crash of 1983</b>
	<b>Beginning of Japanese Dominance of American Video Game Industry</b>
1986	Nintendo distributes the Nintendo Entertainment System (NES) throughout America
1989	Nintendo debuts the Game boy handheld console
	Sega releases the Genesis in America
1991	The Super NES comes out in America
1995	Sony PlayStation comes to US
1996	Tamagotchi released in America (handheld pet game)
1999	Sega releases Dreamcast in US
2000	Sony PlayStation 2 debuts
	<i>The Sims</i> releases and quickly becomes the best-selling PC game ever
2001	Microsoft releases the Xbox
	Nintendo releases the GameCube
	Nintendo releases GameBoy Advance
	<b>Beginning of the Next-Generation Console Wars</b>
2004	Nintendo DS hits shelves
2005	Sony releases the PSP
	Microsoft releases the Xbox 360
2006	Nintendo Wii comes out
	Sony PlayStation 3 comes out
2008	Grand Theft Auto 4 breaks sales records with 6M copies sold first week
	Nintendo launches Wii Fit
2009	Wii Sports becomes best-selling video game ever, taking title from Super Mario Bros

This timeline tracks many of the major developments in video game history, starting with its inception in America. Like the car and the television, the video is another product originally invented in America that the Japanese copied, improved, then shipped back to the US at the expense of American industries. What makes the video game industry unique, however, is how sudden and complete the shift from American-dominated industry to Japanese-dominated industry was.

Most Americans are unaware of the fact that their own Golden Age of Video Games has long passed. Though exact dates are contestable, the majority of scholars agree that it took place from the late 1970s to early 1980s. During this period, the video game industry included both arcade games and home console games. In the Golden Age, the video game industry grew exponentially, swallowing quarters after school and on weekends, invading homes with first embedded game systems, then cartridge based systems (Wikipedia).

Though dozens of American-made consoles were available at the time, one stood out as being the forerunner in US households: the Atari 2600. It was originally released by Atari as the Atari VCS in 1977 and it became one of the most popular home video game consoles of all time.

Unfortunately, it was this incredible popularity that eventually brought about the downfall of both Atari and the entire video game industry. By 1983, third-party developers had flooded the market with hundreds of poorly-designed games. The proliferation of bad games drove down prices, which put many companies out of business. They then sold their stock to firms who put them back on the shelves at bargain prices, only to contribute to the market flooding. This vicious cycle continued until cartridges were worth so little than even the largest and most profitable companies- including Atari itself- went bankrupt and closed their doors forever (Steadman, 148-151).

The infamous crash of 1983 was so devastating to the American video game industry that it still hasn't completely recovered from it. Before the industry had time to heal and possibly experience a renaissance, Nintendo invaded.

Nintendo had been dominating the Japanese industry for years when it launched its American campaign in 1985, just after the American industry had imploded. Nintendo had a chokehold on 90% of the video game industry in Japan (Sheff, 171). Within a few short years, it would achieve a similar position in the United States.

Before making its US debut, Nintendo did all it could to prevent the fates of American companies befalling their console in turn. One of the biggest problems that Nintendo faced in Asia was counterfeiting. Other Asian companies, mostly based in Taiwan, regularly pumped out inferior copies of popular Nintendo games that found their way into major East Asian markets, like China. This practice prevented Nintendo from achieving significant financial success in other parts of Asia. To prevent the same issue from arising in America, Nintendo developed a "security chip" to be embedded in cartridges. This chip allowed the cartridges to "talk" to a console, allowing the two to cooperate. If a cartridge did not have the special chip, the console would simply lock it out and refuse to play it (Sheff, 181).

Not only did this invention prevent further counterfeiting, but it allowed Nintendo direct regulation over third-party developers, who would have to negotiate a contract with Nintendo if they wanted access to the security chips. This system elevated Nintendo to an extremely advantageous bargaining position; if a developer wanted to make games for the Nintendo, they needed to meet the company's high standards. Nintendo also dictated that only they, not third party developers, could actually make the games. Developers would gain approval of their design, then order cartridges of their own game from Nintendo, which they could then sell.

In Japan, this sort of vertical organization is normal for large businesses. Companies acquire smaller businesses that contribute to the overall development of their product in order to achieve self-sufficiency for the company (Koda). In America, however, Nintendo's death grip on the video game industry was eventually labeled a monopoly, and after several court battles over its relationships with third-party developers, the company relaxed its grip on the market, if only slightly.

In spite of these developments, Nintendo enjoyed incredible success in the United States. In 1991, Nintendo surpassed Toyota as Japan's most successful company, and in the early 1990s, the company netted "as much as *all the American movie studios* combined and profited more than any of them" (Sheff, 5). Within 5 years of entering the American market, the Nintendo Entertainment System could be found in more than one third of all US and Japanese households.

If that isn't convincing enough, Sheff points to "Q" ratings, which measure the popularity of celebrity and cultural icons using controlled surveys, to illustrate how deeply Japanese games had invaded the American collective consciousness (9). A 1990 study using "Q" ratings showed that more American children recognized Super Mario, Nintendo's beloved mascot, than Mickey Mouse.

But Nintendo couldn't hog the spotlight forever. As is marked on the timeline, 1989 saw the debut of Sega's first console released in America: the Genesis. In 1995, Sony entered the field with its PlayStation. These three Japanese companies continued to battle it out at home and in the US throughout the 1990s, each releasing a second-generation console in that time (the PlayStation 2 came late in 2000).

It wasn't until 2001, more than 15 years after the original industry crashed, that an American company dared to put a new console out on the market: Microsoft's Xbox took over Sega's place as one of the Big Three companies involved in the Console Wars.

Today, Nintendo still dominates the worldwide market with the Wii, followed distantly by Sony's PlayStation 3 and Microsoft's Xbox 360. The situation is much the same in the US; though the Xbox 360 far outstrips the PS3 in American sales, it remains 10 million units behind the Wii (VGChartz).

The software side of the industry also shows Japan dominating when it comes to market permeability. Of the top 10 games sold in America in 2009, 7 were made by Nintendo. Of the top 10 games sold in Japan in 2009, not a single one was made by an American company. Nintendo, in conjunction with other successful third-party developers such as Capcom and Square Enix, continues to pour Japanese-origin artifacts into American homes.



Thanks to a brilliant combination of savvy business practices, ingenious technological innovations, a strategic marketing campaign, and the incredible luck of being in the right place at the exact right time, Nintendo succeeded in placing, for the first time in its nation’s history, Japanese products with cultural significance in an overwhelming number of American homes. Unlike cars or televisions, video games contain meaning inherited from the culture in which it was designed. Even today, with the proliferation of *anime* and *manga*, video games remain the number one cultural product imported from Japan. For this reason, video games should and must be examined as the vehicles of intercultural exchange that they are. That is one of the reasons why I decided to center my thesis topic around the video game industry.

In the remainder of my paper, I will present research on the preferences of American and Japanese video game consumers with the purpose of examining them from a cross-cultural perspective as well as a marketing perspective. This research will culminate in design recommendations that will allow American video game developers to more successfully produce and market games for an American audience.

## **MULTIPLAYER VERSUS SINGLE PLAYER**

A striking difference between the preferences of American and Japanese video game consumers is their feelings toward single player versus multiplayer games.

VGChartz, a website that tracks video game sales worldwide and organizes them according to multiple categories including US and Japanese sales, presents the following 2009 bestsellers list for America and Japan, respectively:

### **Top 10 Bestseller Lists for American and Japan in 2009**

	Top 10 Bestselling Video Games in America 2009	Console	Publisher	Genre
1	Wii Sports	Wii	Nintendo	Sports/Family
2	Call of Duty: Modern Warfare 2	Xbox 360	Activision	FPS
3	Wii Sports Resort	Wii	Nintendo	Sports/Family
4	Wii Fit	Wii	Nintendo	Fitness
5	New Super Mario Bros.	Wii	Nintendo	Platform
6	Wii Fit Plus	Wii	Nintendo	Fitness
7	Mario Kart Wii	Wii	Nintendo	Racing
8	Wii Play	Wii	Nintendo	Family
9	Halo 3	Xbox 360	Microsoft	FPS

10	Call of Duty: Modern Warfare 2	PS3	Activision	FPS
	Top 10 Bestselling Video Games in Japan 2009			
1	Dragon Quest IX	DS	Square Enix	RPG
2	Pokemon HeartGold and SoulSilver	DS	Game Freak	RPG
3	New Super Mario Bros. Wii	Wii	Nintendo	Platform
4	Tomodachi Collection	DS	Nintendo	Life Simulation
5	Final Fantasy XIII	PS3	Square Enix	RPG
6	Wii Sports Resort	Wii	Nintendo	Sports/Family
7	Wii Fit Plus	Wii	Nintendo	Fitness
8	Monster Hunter Tri	Wii	Capcom	Action RPG
9	Inazuma Eleven 2	DS	Capcom	Sports RPG
10	Monster Hunter Portable 2nd G	PSP	Capcom	Action RPG

Out of the top 10 games sold in America in 2009, 8 are console multiplayer, meaning they can be played on the same video game console by more than one person. 3 are online multiplayer- players can play together from different locations. If you happen to know a bit about video games, you might recognize that at least half of the games on this list heavily emphasize multiplayer.

In contrast, the list for Japan 2009 bestsellers barely has any multiplayer games. Only 3 are console multiplayers, and 4 have wireless multiplayer modes. Only 2 of the games on this list heavily emphasize multiplayer modes.

At first, this information was jarring to me because it seemed to directly contradict a core difference between Japanese and American societies that were emphasized again and again throughout my studies of Japanese culture: Japan has a group-oriented society and America is an individualistic society. When applied to video game preference, this knowledge would imply that the Japanese would favor multiplayer games that allow them to enjoy the game as a group (Reischauer, 135), while Americans would prefer single-player games. However, video games sales statistics are exactly the opposite.

As shocking as these statistics may seem at first, it would be overreaching to say that they in any way disprove social theories that are widely accepted by experts of Japanese and American cultures. Rather, this surprising data can be explained in terms that actually reinforce what we already know about group-orientation and individualism.

## **Group Permeability**

Like other Asian peoples, the Japanese are a group-oriented society. The groups to which a Japanese person belongs are varied, and they “usually play a larger role and offer more of a sense of individual self-identification than do corresponding groups in the United States” (Reischauer, 134). Thus, in Japan, heavy emphasis is placed on the group, even to the expense of individuals, and group cohesion must always be maintained (Reischauer, 128- 139).

Because of exclusive character of social groups, the Japanese have constructed strong, largely impermeable barriers distinguishing *uchi* (insiders) and *soto* (outsiders) (Davies, 196). For most people, the nuclear or extended family is their most immediate and inflexible group.

If you’ve ever had the opportunity to visit a residential area in Japan, you might notice that houses are constructed within outer walls that are taller than most people. On the other hand, American houses usually only have fences in their backyards. Rarely do they have walls that enclose the entire house, and fences in the front yard are only waist-high. This visible difference is a metaphor for how the Japanese and Americans see their homes- to the Japanese, the house is a private space for family members, not outsiders. On the rare occasion that outsiders are invited into the home, they “are treated courteously as formal guests” (Takeuchi, 213). In America on the other hand, it is not unusual for neighbors or friends to “drop by” casually, and children often have friends over. The permeability of American households is unheard of for Japanese homes.

This difference in permeability may explain why multiplayer games are more popular in America than in Japan. In America, friends can congregate at one person’s home to play a multiplayer console game. In Japan, multiplayer console games would largely be restricted to family members, limiting their use and attractiveness to Japanese video game consumers.

## **Social Gyroscope**

Another possible explanation would be the use of video games as a form of social gyroscope. In other words, Japanese and American consumers may use video games as a way to achieve individual or alone time to balance out their usual social routines.

The Japanese spend the great majority of their day moving from one tightly-bound group to another. In the morning, they leave their core family group and go to school or work, where they spend the day interacting with their classmates or colleagues. After school, students participate in extracurricular clubs, followed by cram school or study groups. Workers may stay late at work if their fellow employees do so, then they are likely to go out with the same people they work with for a drink

(Reischauer, 135). Both students and workers then arrive home very late. Very little of their day is spent alone on personal activities.

Americans, on the other hand, are more likely to find ways to insert alone time into their days. Students come home from school much earlier than their Japanese counterparts, giving them the opportunity to enjoy leisure time watching TV or doing other individual activities. American workers also leave work much earlier than Japanese employees, and rarely do they go en masse for drinks afterwards. More likely, they break off to meet with friends outside of work, run errands, or go home.

And most importantly, Americans do not feel obligated to plan their day around the groups to which they belong- if their colleagues are going for a drink but they are tired, Americans feel no qualms about calling for a rain check and going home. Students feel less guilty about playing hooky from after-school organizations. A Japanese worker, however, would feel socially obligated to accompany their coworkers to the bar, and a good student would never think of skipping a club meeting. Though on the surface, Americans' and Japanese's days seem fairly similar, Americans spend their day as individuals in group settings; Japanese spend their day enmeshed within various groups.

If most of their day is spent considering the needs of the group, it stands to reason that a Japanese person might appreciate an activity that necessitates individual, not group, participation. Single-player games would fill this role nicely. Whether on a console at home or on a handheld system on the train, the Japanese apparently prefer single-player video games. As a social gyroscope, these video games would give them some much needed alone time.

For the individualist Americans, however, video games present an opportunity to engage in group activity. In essence, multiplayer video games have replaced board games of previous generations, providing friends and acquaintances a chance to engage in friendly competition or cooperation in the comfort of their living rooms. Four of the top-selling video games on the American list above are competitive in nature yet easy for beginners and non-gamers to learn, facilitating participation from a larger population. Three on the list are most often played by more experienced gamers, but they also encourage group cooperation in order to beat the game. As a social gyroscope, these video games foster participation in groups.

I have no doubt that there are a variety of other explanations as to why group-oriented Japanese consumers play single-player games and individualist American consumers prefer multiplayer games. Some may even directly oppose widely accepted theories about these two cultures. But from what I have learned about the Japanese and what I know from personal experience as an American

gamer, I am inclined to believe that consumers' preferences provide further insight into our cultures, insight that strengthens, not contradicts, what we assume to be true. It is unlikely that one isolated example of consumer habit could be used to undue decades of socio-cultural research, however surprising it may be at first.

## **SURVEY 1**

The primary purposes of survey 1 were as follows:

1. To determine which attributes of video games are most influential to consumers' preferences
2. To reveal the extent to which consumers are aware of these attributes' effects on their enjoyment of video games
3. To discover any correlations between which attributes consumers prefer most and which games, American or Japanese, they prefer

60% of participants completed the survey start to finish, and I only analyzed the responses of those who completed the entire survey; therefore, my survey pool was 181 people. These participants were American video game consumers over the age of 18. I solicited most heavily from the students at Carnegie Mellon University. Participants also included students at other universities and adults outside of college. Because I did not include demographic questions in Survey 1, it is impossible to know for sure how many people from each group completed the survey. A reasonable estimate of the pool would be mostly CMU undergraduates, some undergrads from other universities, with a small population of working adults from the late twenties to early fifties.

In selecting video game attributes to observe, I looked to the most popular gaming magazines and websites that rank video games in discrete categories: ign.com, GameInformer Magazine, etc. The majority of sources I reviewed grade video games on the following five attributes:

- Gameplay- how the player interacts with the game, its rules, how the game progresses, the genre of game, design, game mechanics
- Graphics/Art- how the game is rendered in 2D or 3D graphics
- Music- the background music and original score in a game
- Story- the plot, character development, script, themes
- Value- length of the game versus cost, replayability

My assumption going in was that consumers who prefer story over gameplay would prefer Japanese video games over American ones; I hypothesized that gameplay lovers would choose Japanese and American games about equally. I felt that people who placed the greatest importance on music, value, or graphics would most likely be niche-consumers and therefore not a large enough population to warrant particular attention.

My hypothesis about story-people preferring Japanese video games stems from my personal experiences with Japanese video games and what I know about East Asian cultures in general. According to scholars like Richard Nisbett, author of *The Geography of Thought*, one of the major differences between Western and Eastern cultures is how they each deal with context (Chapter 4). East Asian cultures place comparatively heavier emphasis on context than Western cultures do. Therefore, it makes sense that Japanese video games would feature more elaborate and thoroughly constructed narratives than American games. Based on this cultural knowledge, one may assume that a Japanese gamer would feel more comfortable playing a game where the character's world, i.e. the game's context, was more painstakingly developed. Westerners, however, are more comfortable functioning independently of context; therefore, American developers making games for American audiences are freer to develop games that do not necessarily require fully fleshed-out storylines.

### **Question 8**

Question 8 asks:

*Which of the above two games is your favorite?*

It follows questions about the survey taker's favorite Japanese video game and their favorite American video game, so it forces them to choose one over the other as his or her favorite. I base my assumption of the participants' general preference for American or Japanese video games on this response in particular. Granted, someone who usually plays Japanese video games might just happen to like an American game the best overall, or vice versa, but in general, I feel confident that a person's favorite game reflects their usual tastes. Also, as people are asked to list subsequent preferences, their responses become less and less confident, so the top choice is usually the strongest and most accurate. If there were such cases where a participant's top pick was a personal outlier, I think we can rely on the size of the sample to balance itself out.

The results of this question turned out to be nearly half-and-half:

### Favorite Video Game's Country of Origin

American game	48%
Japanese game	52%

The difference between the percentages is so small as to possibly be statistically insignificant. What these results tell us is that my sample was made up of nearly equal parts American-style video game consumers and Japanese-style video game consumers, an ideal mix for the purposes of my study.

### Question 3

The first game-related question of Survey 1 (question 3) was structured in the following manner:

*Scenario: You have been offered the chance to make The Best Video Game Ever. You have five weeks to complete it, and each week you can focus on a different element of the game. Starting with the most important element, list which areas of the game you would focus on from week one to week five.*

My intention was to prompt participants to spontaneously reproduce the five video game attributes in a specific order, assuming that they would start from the most important element (in their opinion) to the least important. I felt it important to begin with an open answer question because it would garner the most honest responses from participants about their conscious reasons for liking a video game. It is a gut-reaction type of response without extensive forethought. The subliminal question inherent in it is: What makes you buy a video game?

Because this question was formatted as a spontaneous response, I had to examine every answer and decide whether the first attribute listed was one of the five attributes described above. Most of the time, participants used diction that either copied or closely mimicked my pre-selected attributes. However, there were a few cases where I could not confidently place a participants' response into a category; for example, "fun" was an unacceptable answer. These answers were not counted.

The results of question 3 were:

### Most Important Video Game Attribute

Gameplay	48%
Music	0%
Graphics/Art	9%
Story	43%
Value	0%

Because this was the first question asked and it was open response, we can assume that these answers reflect the attributes that most consciously affect participants' preferences for video games.

#### Question 14

This question appears last in Survey 1 because its purpose is to contrast chiefly with Question 3. It is worded:

*Rank the following video game attributes from most important (1) to least important (5).*

This question was organized as a forced ranking chart where participants had to rank the above five attributes from most important to least important. The results were the following:

**Video Game Attribute Ranking**

	1	2	3	4	5
Graphics/Art	10.60%	25.00%	27.20%	25.00%	12.20%
Music	18.30%	10.90%	16.00%	23.40%	31.40%
Gameplay	32.80%	17.20%	12.60%	10.30%	27.00%
Story	22.60%	26.00%	17.50%	18.10%	15.80%
Value	14.50%	21.20%	26.80%	23.50%	14.50%

It is apparent that gameplay beat out all other attributes as the top choice by more than 10%. Not only was story chosen by the next highest percentage for first, but it was most often chosen as second. Graphics and value tied for third, and music trailed a distant fifth, though it did beat out both graphics and value in tier 1. One might assume that those who feel music is especially important in video games are the same people whose favorite games are Rock Band, Guitar Hero, or others that center around music.

Question 14 essentially asks the same question as number 3: namely, what about a video game is most important to you? However, they differ in two vital respects: 1) question 14 presents the participant with specific attributes, and 2) it follows a series of questions designed to force participants to consider their preferred video games and why they enjoy them. At this point, the survey takers have spent about ten to fifteen minutes considering their personal preferences. By the last question, they are more aware of what they really desire in a video game and what actually affects their enjoyment of a game, rather than why they initially picked it up. Therefore, answers to question 14 are more representative of what makes players loyal to a specific franchise, replay a game, or spend more time on it. If question 3 asks why players buy a video game, question 14 asks why they keep playing it.



This is also evidenced in the fact that while no participants wrote down value or music as their primary concern in question 1, several people chose it in question 14. These responses show that after forcing participants to seriously consider what makes a game appealing to them, and by providing specific responses that they must rank, some consumers become aware that attributes other than gameplay or story have the greatest effect on their enjoyment.

The most important difference in the results between questions 3 and 14 is the relationship between gameplay and story. According to question 3, consumers buy video games most often because of gameplay, but almost just as often because of story. The discrepancy between these percentages is larger in question 14- it doubles from 5% to 10%. This shows that while gamers may initially respond to a game's story nearly as much as its gameplay design, they are more likely to keep playing the game and remember it well afterwards for its gameplay elements.

This is an important distinction for video game developers because it tells them to focus more time, energy, and money into developing gameplay as opposed to story. Recently, there has been an increase in narrative-driven stories, in part due to the incredible technology of next-generation consoles that allow developers to push the limits of their story-telling capabilities. One of the drawbacks to this has been a tendency for some companies to spend an unprecedented amount of time on story and less on gameplay; these story-heavy games, loaded with artistically rendered cutscenes, are often dubbed "interactive movies" by gamers, a term implying too many cutscenes, not enough gameplay.

An excellent example of this is *Final Fantasy XIII*, a Japanese-style role playing game (J-RPG) released this March by one of the leading video game studios in the world: Square Enix. Though applauded in Japan, it has received a lukewarm reception in America that is uncharacteristic for a title in the *Final Fantasy* franchise. Most negative reactions are related to the unusually linear structure; one of the trademark characteristics of this franchise is the open-world format which allows players to explore vast areas and discover secret locations, hidden items, etc. But for the majority of *FFXIII*, players are forced to traverse narrow paths with few to no side avenues, no hard-to-find items, and no side quests. The omitting of these elements results in a very controlled environment that detracts from the player's ability to customize his or her experience.

A recent article in *The New York Times* by Seth Schiesel attempts to explain why this change in game design might turn traditional American *FF*-fans off of the series. He relays the position of a Square Enix designer on the differences between Japanese and American role-playing games:

*North American role-playing gamers, he said, want to feel that they are in control. They want to design their own characters, and they want to be set loose in an*

*environment in which they can shape the world and its story according to their own choices.*

*...The top Western role-playing games of recent years- Dragon Age: Origins, Fable II, Fallout 3 and Mass Effect games (not to mention online games like Eve and World of Warcraft)- have been built around the concept of player agency. Japanese players, he went on, have a different taste in role-playing games: They want to be presented with characters and a story that have been meticulously created and shaped for their consumption.*

This description of the difference between American gamers' and Japanese gamers' desire for agency (or lack thereof) coincides with theories about cultural differences presented in Nisbett's book. In describing generalizations that can be applied to Westerners, he states, "[Westerners] feel better when they are in situations in which choice and personal preference determine outcomes" (47).

The linear style gameplay of *Final Fantasy XIII* is in part a result of its overbearing story. While trying to craft a thorough and extremely detailed plot with remarkably lifelike and complex characters, the Square Enix team sacrificed player agency, a trade-off that hurt its appeal with American video game consumers. Thus, *Final Fantasy XIII* is a perfect illustration of my findings so far: gameplay, not story, has a greater affect on American consumers' enjoyment of video games.

## Questions 5 and 7

Question 5 is another open response question; it asks:

*What about [your favorite Japanese video game] do you like best?*

Results were as follows:

### Favorite Attribute of Japanese Video Game

Gameplay	41%
Music	3%
Graphics/Art	11%
Story	40%
Value	4%

Participants wrote gameplay or story about the same amount of times, which graphics followed at a distant third and value and music represent only a handful of responses. These answers show that

when it comes to Japanese video games, American consumers find gameplay and story equally important in determining enjoyment.

Question 7 asks the same about American games:

*What about [your favorite American game] do you like the best?*

Results were:

**Favorite Attribute of Japanese Video Game**

Gameplay	57%
Music	1%
Graphics/Art	11%
Story	30%
Value	4%

This time, participants picked gameplay almost twice as often as they did story for why they like their favorite American game. Graphics and value were chosen the same number of times as before, whereas music dropped a couple of percentages.

**Gameplay-lovers**

When I first saw the results of the two questions above, I jumped to the conclusion that the discrepancy must indicate that consumers who feel gameplay is most important must like their American video game over the Japanese one; I thought that the statistics presented in question 7 indicated that American video games better satisfied these particular participants' love of gameplay, whereas with the Japanese games, gameplay seems to be equally as important as story.

However, my review of question 8 revealed that I was entirely mistaken. I applied a filter to Survey 1 that showed me the responses of only those people to had ranked gameplay as their number one attribute in question 14. Then I looked at their responses to question 8:

*Which of the above two games (the Japanese or the American) is your favorite?*

**Gameplay-Choosers' Favorite Video Games' Country of Origin**

American	30%
Japanese	70%

What I had mistaken for strength being displayed in American video games' gameplay was actually weakness in their stories. These three tables show that for participants whose enjoyment is most influenced by gameplay, Japanese video games surpass their American rivals for dominance. Question 5 indicates that Japanese video games are equally strong in both gameplay and story, whereas American video games are significantly weaker in story, leading participants to more often choose gameplay as those games' strongpoint in question 7.

One potential explanation for the Japanese developers' relatively heavy emphasis on story is the idea that their society falls into the "high-context" category (Nisbett, chapter 3). Like other Asian societies, the Japanese view themselves and the world as being fluid and interdependent; in order to understand something, one must understand the context in which it exists. This mode of thought directly contrasts with "low-context" Western society, which views the world in terms of discreet objects with particular attributes- context is relatively unimportant. In this light, it makes sense that Japanese developers would place heavier emphasis on story, i.e. the context of the game.

However, one might interpret this information as meaning that American gamers wouldn't care as much about story *because* they operate in a low-context society. But my findings show that story is indeed important in determining consumers' enjoyment of video games. The Japanese developers' heightened awareness of context must influence them to craft more intricate and satisfying plotlines and characters, and this dedication to story clearly appeals to American gamers.

Keeping the gameplay filter on, I looked again at question 3 to see how the 100% of people who declared for gameplay in question 14 initially responded. Here is question 3 again:

*Scenario: You have been offered the chance to make The Best Video Game Ever. You have five weeks to complete it, and each week you can focus on a different element of the game. Starting with the most important element, list which areas of the game you would focus on from week one to week five.*

#### **Most Important Attributes to Gameplay Choosers**

Gameplay	55%
Music	0%
Graphics/Art	12%
Story	33%
Value	0%

Surprisingly, only about half of the people who eventually ranked gameplay as number one initially chose it as their primary focal attribute. It seems that 45% of these people switched sides from either story or graphics.

This comparison reinforces the conclusions I drew earlier regarding the relationship between questions 3 and 14: the increase in discrepancy between gameplay people and story people reflect participants' realization that gameplay is more important to their enjoyment of video games than story after a period of reflection. It also implies that though some gamers may initially feel that story is most important to their enjoyment of a game, a healthy chunk of them eventually switch sides and find that gameplay is more vital to their enjoyment of the game.

### **Story-lovers**

Naturally, after examining the responses of people who ended as gameplay devotees, I had to then examine the same responses for people who elected story as their first attribute in question 14.

Their responses to question 8, which asked them to choose either the American or Japanese game as their favorite, yielded these percentages:

#### **Story Choosers' Favorite Video Games' Country of Origin**

American	50%
Japanese	50%

Remarkably, these people split themselves right down the middle; each side garnered 19 votes. This division almost exactly reflects the overall responses to question 8, which showed a 52-48 split in favor of Japanese games.

This equal division between American and Japanese video games implies that both sides produce games with excellent storylines, narrative, and characterization, yet this conclusion contradicts my earlier one about why gameplay-lovers rated American games as being significantly better at gameplay than story; I attributed this to American games' weak story attribute. The problem is further exacerbated by the fact that these participants then went on to choose Japanese video games a significant number of times over American ones as their favorite.

So which camp is right: are American and Japanese developers equally skilled at creating the story behind their games as the story-lovers claim, or do Japanese games surpass American ones in both gameplay *and* story, as the gameplay-lovers seem to suggest? This conflict embedded in my data is

beyond my knowledge to mediate, and I don't see an answer in any of the other questions in my survey. This will have to be one mystery that is solved by more experienced scholars than I.

Still looking at story-concerned participants: I filtered out their responses to question 3 and found these results:

#### **Most Important Attributes to Story Choosers**

Gameplay	15%
Music	0%
Graphics/Art	1%
Story	80%
Value	0%

It seems that story people, far more than gameplay people, are largely aware of their preferences for video games. The consistency of these participants shows that people who feel story is most important to their enjoyment are more consciously aware of that fact than those who prefer gameplay.

When considering the nature of gameplay versus story, one cannot avoid acknowledging that most of the development that goes into a video game falls under the heading of "gameplay"; considerably less of the game is considered story-related. That might make it easier for people who do respond most significantly to story to be more aware of this preference, whereas people who actually respond best to gameplay might have a more difficult time discerning what falls under the gameplay category.

#### **Music-Lovers**

After making so many assumptions about music-lovers being those people who chose music-centered games as their favorite, I thought it would be best to apply a filter to see if I was correct. I was dismayed to find myself yet again woefully mistaken: not a single person who picked music as the first category in question 14 chose a music-centered game such as Rock Band or Guitar Hero for their favorite American game. However, several people in the unfiltered version named either of these games as their favorite; clearly, there is some other attribute that draws people to these games. Music is a secondary draw for them.

#### **Graphics- and Value-Lovers**

I did not see any significant trends when applying filters for either of these groups.

## Summary

The main points to take away from Survey 1 are:

1. Though American video games consumers are equally as likely to be initially attracted to video games by gameplay or story, gameplay more often affects consumers' lasting impressions of the game.
2. American video games' stories are significantly weaker than their gameplay.
3. Consumers who are most affected by gameplay prefer Japanese video games.
4. For consumers whose video game preferences are most swayed by story, American and Japanese video games are equally appealing.
5. Story-drawn consumers are largely conscious of the fact that story is the most important factor determining their enjoyment of video games.
6. Contrary to what one (I) might assume, consumers who are most drawn to music are not most drawn to music-centered games.

## SURVEY 2

The primary purposes of survey 2 were:

1. To see how various segments of the American video game consumer population exhibit different purchasing habits
2. To identify important differences between male and female game consumers, as well as important trends within the groups
3. To determine how console access affects game preference
4. To find a link between play style (single versus multiplayer) and console/video game preference

86.2% of participants completed the survey start to finish, and I only analyzed the responses of those who completed the entire survey and marked themselves as Americans; therefore, my survey pool was 94 people. These participants were American video game consumers over the age of 18. I solicited most heavily from the students at Carnegie Mellon University. Participants also included students at other universities and adults outside of college. 70% were female, 30% were male. 81% marked themselves as being between the ages of 18-24; 11% marked 25-34 years old; the remainder were older.

Following this basic demographic data, I asked various questions regarding video game and entertainment/communications technology consumption. I analyzed this data for all complete

responses, then I applied various filters distinguishing groups based on gender, time spent playing games, and console availability. The following comparisons highlight significant discrepancies between response groups.

### **Males vs. Females**

One of the most dramatic differences between male and female video game consumers who participated in my survey is the amount of play time they log per week. 65% of female participants said they play video games for 1 hour or less per week; at 32%, the most-often selected playtime for males was 10 or more hours. This indicates the women are most likely to purchase and play casual games, whereas males are more likely to play serious games that require a larger time commitment. It is important to note, however, that the percentage of females who chose casual games is twice as high as the percentage of males that chose serious games. From a developer's point of view, this is important because it indicates that they could reach a potentially larger audience with casual games than with serious ones.

I included a question that asked participants to choose all the social settings in which they play video games: alone, with friends in the same room, with friends online that you know in person, with friends online that you've never met in person, or with a guild or similar in-game organization. Both men and women chose alone the greatest number of times, but women chose it at a rate 20% less than men. Both groups then chose "friends in the same room" for the second spot, with males leading the females by a 7% margin. After these two categories, female participants chose the other options at rates of less than 16%. In contrast, male respondents chose both "friends online that you know in person" and "friends online that you've never met in person" 46% of the time. I would posit the explanation that males' tendency to play the Xbox 360 might help explain these high percentages. 57% of males indicated that they own or have regular access to an Xbox 360 console. This console, which typically sells best amongst male gamers, facilitates online gameplay and many of its most popular titles, such as Halo and Call of Duty, heavily emphasize online cooperative play. Less than 14% of female respondents said they have regular access to an Xbox 360; the most commonly-used console for them is the Wii, which does not facilitate online gameplay.

The last area in which males and females exhibited important differences is in genre preference. Nearly all video games fall into discreet genres that conform to specific attributes such as gameplay style, length, player options, etc. Video game consumers tend to play games within only a few genres with attributes that appeal to them. Knowing which genres consumers prefer is important because



development studios usually make games in only a few genres, and when considering the global market, Japanese and American developers excel in different genres for various reasons.

The results of survey 2 show that males most strongly favor role-playing games (RPG), action-adventure games, and real-time strategy games. The majority of these types of games are single-player games, though there are some notable exceptions such as *Borderlands*, a first-person-shooter/action-RPG that has cooperative and multiplayer modes. In contrast, female participants chose rhythm games, family entertainment games, and puzzle games as their favorites. Both rhythm games and family games center around group play. Though both groups chose “alone” and “friends in the same room” as their top two play styles, the results of the genre question clearly show that women are far more inclined to play multiplayer video games than men are. This finding links to the fact that most players on online social games such as Zynga’s hit Facebook flash games, *Farmville* and *Café World*, are female (Gross).

In summary, the ideal video game for male consumers is a serious Xbox 360 title that focuses on single-player gameplay but may include multiplayer options. For female consumers, a casual Wii game that heavily emphasizes group play is the ideal product.

### **Casual Gamers vs. Serious Gamers**

For the purposes of this study, I placed survey participants into three categories based on their reported play times per week. Those who marked 1 hour or less per week are to be considered “casual gamers”; those who play 10 or more hours are “serious gamers”; those who play between 2 and 9 hours per week are moderate gamers. I decided it would be most valuable to compare the two extremes of this spectrum: casual and serious gamers.

The differences between casual gamers and serious gamers are very similar to those between females and males, probably due to the fact that most females are casual gamers and serious gamers tend to be males. For serious gamers, the ratio of men to women was 3:1; for casual, it was 1:7. The survey did yield a few interesting statistical points that deserve some attention, though.

Over 80% of the serious gamers surveyed fell within the 18-24-year-old range. For casual gamers, that range only claimed 66% of the group; the rest fell under 25-34 years old. This difference shows that older gamers are more likely to play casual video games than serious ones.

75% of serious gamers chose an American title as the game they spent the most time playing in the past year. Casual gamers exhibited a split 50/50 preference for American and Japanese video games. This indicates that American developers make video games that have a greater appeal to serious

American gamers, while Japanese developers hold an equal footing with American companies in casual game genres.

Unsurprisingly, serious gamers chose role-playing game titles as their favorite most often. RPGs tend to be longer in duration and are often designed such that longer play periods are either necessary or desirable. As expected, casual gamers most often chose family entertainment titles as their favorite game. Family games are designed to be user-friendly and require relatively little time commitment from players.

The most interesting difference between serious and casual gamers is with whom they prefer to play. Serious gamers chose “alone” and “friends online you’ve never met in person” most often and in almost equal amounts. In contrast, casual gamers chose “friends in the same room” the most, even more often than “alone”. This information is important because it tells developers under what conditions their audiences are playing their games. Those consumers who spend the most time using video games prefer to do so alone or with an online network of people they’ve never met. This indicates that certain genres, such as RPGs or MMORPGs, would be most attractive to them. On the other hand, casual gamers are most likely to purchase games that they can play with other people on the same console. This means that the largest and hardest-to-reach sector of the market can best be accessed using multiplayer console games.

### **Wii vs. Xbox 360**

Finally, I thought it would be worthwhile to pit Nintendo’s Wii, the bestselling console in the world and the #1 console out of Japan, against Microsoft’s Xbox 360, the only next-generation console currently made by an American company.

There is actually a great deal of overlap between Wii owners and Xbox 360 owners. 72% of Xbox 360 owners also marked that they have regular access to a Wii. Only 53% of Wii owners said they also have access to an Xbox 360; a lesser percentage, but still a majority. This means that the responses of both groups are probably quite similar. Relatively narrower margins of difference than appear when using other types of filters should warrant attention.

One of these marginal differences appears when looking at social gaming habits. Both Wii and Xbox 360 players chose “alone” more than 80% of the time, but Wii people picked “friends in the same room” 7% more often than Xbox 360 people. This makes sense when you take into account how many more of the top-selling Wii games emphasize multiplayer modes. A large number of casual games on the Wii also accounts for the 32% of Wii owners who play for 1 hour or less per week; conversely, the

high number of serious games on the Xbox 360 agrees with the statistic that 40% of its players log 10 or more hours a week.

When looking at the video games each group played the most in the past year, Xbox 360 users chose American over Japanese games in a 3:1 ratio; Wii players also played more American games, but in a 3:2 ratio. Wii players are more likely to spend time playing Japanese video games than Xbox 360 people, though both are most likely to be found enjoying an American-made game.

The results of the question concerning favorite genre were interesting. Both parties chose role-playing games as their favorite genre, but each tied an additional genre with RPG for first place: Xbox 360 players picked massively-multiplayer online role-playing games (MMORPGs) and Wii users picked family entertainment games. What is interesting is that both genres are multiplayer genres, but MMORPGs allow consumers to play with other people online from other consoles or computers while family entertainment games allow people to play together in the same room. This finding reflects actual video game market trends and emphasizes the importance of genre-specific multiplayer options in accessing different sectors of the video game consumer population.

## Summary

The most important points to take away from the result of survey 2 are the following:

1. Male video game consumers are most likely:
  - a) Xbox 360 users
  - b) “serious” gamers who log 10 or more hours of playtime a week
  - c) players who prefer games which emphasize single-player gameplay but also include console and online multiplayer capabilities
2. Female video game consumers are most likely:
  - a) Wii users
  - b) “casual” gamers who log 1 hour or less in playtime per week
  - c) players who prefer games that heavily emphasize multiplayer gameplay on the same console
3. Casual gamers are:
  - a) most often female
  - b) more likely than serious gamers to fall into the 25-34-year-old age range
  - c) equally likely to prefer Japanese or American video games
  - d) most inclined towards games that fall into the family entertainment genre

- e) those that most often play with friends in the same room
4. Serious gamers:
    - a) are most often male
    - b) most often fall between the ages of 18 and 24
    - c) prefer American video games 75% of the time
    - d) play role-playing games more than any other type genre
    - e) would rather play single-player games or online multiplayer games with people they've never met in person
  5. Most people with regular access to a Wii also have access to an Xbox 360, and vice versa.
  6. Wii players are somewhat more likely than Xbox 360 players to prefer games that allow them to play with friends in the same room.
  7. Wii users are most likely casual gamers.
  8. Xbox 360 users are most likely serious gamers.
  9. Both Wii users and Xbox 360 users prefer American games over Japanese games, but Wii users are more likely to prefer Japanese games than Xbox 360 users are.
  10. Xbox 360 users prefer RPG or MMORPG games; Wii users prefer RPG and family entertainment games.

## **THE PERFECT GAME**

Don't let the title fool you- the results of my research are far from being comprehensive enough to predict the qualities of a perfect video game. However, they do reveal important information about American video game consumer preferences that video game developers can and should use to their advantage. These are some ideal qualities and attributes that a developer should use when trying to make a video game with the greatest possible appeal to American video game consumers.

### **Development Process**

One of the primary goals of survey 1 was to determine which attributes of video games have the greatest influence on a consumer's preferences. The clear winner was gameplay, followed closely by story. Therefore, developers should spend the greatest amount of time developing gameplay elements; the next area of focus should then be story. It is especially important for American game developers to

improve the quality of their gameplay elements because my results show that American gamers to whom gameplay is the deciding factor in their choice of game (i.e. most consumers), Japanese video games are preferable to American ones. Therefore, American developers need to concentrate first and foremost on their product's gameplay designs. Survey 1 also illustrates that American developers need to strengthen their stories. Japanese video games are beating American ones in terms of story, perhaps due to underlying cultural reasons. American companies should take their cue from their Japanese counterparts and create more elaborate and convincing contexts for their games. The other three elements (music, graphics, and value) should be dealt with only after the gameplay and story elements are fully developed.

### **Agency**

One attribute of video games that had a large effect of American gamers' preferences for American and Japanese games is the degree of agency within the game. As my research shows, American gamers need to feel that they have agency within the game. Developers can achieve this by using an open-world format that allows extensive exploration rather than a linear format that dictates player progression. It is also important to allow the player to feel they can create a customizable experience in the game. This feeling may come from side quests, upgradable weapons or items, or optional story branches. Whatever the method, American consumers want to feel that they have an active role to play in the game's development, unlike Japanese gamers, who prefer to experience a game that has been completely planned out for them.

### **Genre and Social Setting**

When it comes to how Americans play video games, the bottom line is this: they want the option of playing with other people. Most often, this means people in the same room, but playing with people online is also a viable option. In order to reach the maximum amount of potential video game consumers, developers should focus on genres that facilitate group play, such as family entertainment, rhythm, MMORPG, and FPS (first-person shooter). These genres all emphasize either console or online multiplayer gameplay and appeal to the full range of gamers from casual to serious, female to male. These are the core genres that have something for everyone.

## **Console**

In order to reach the most consumers at this point in time, developers would benefit most by making games for the Wii. Not only is it the top selling console in the United States, but an overwhelming majority of people who have access to Xbox 360s also have access to a Wii, whereas fewer Wii owners also own Xbox 360s. The PlayStation 3 has not yet sold enough units in the US to be included in this race. If, however, the Xbox 360, PlayStation 3, or another console were to become most popular with casual gamers while overlapping significantly with owners of the Wii and Xbox 360, then developers would be wise to shift production to that console.

In accordance with the results of the body of my research, a game which includes the elements and specifications described above should achieve commercial success across the majority of the American video game market. By following these recommendations, American video game developers can more aggressively compete with Japanese developers for the American audience.

## **CONCLUSION**

Though the research and analysis presented in this document are preliminary, it contains some results which are valuable in understanding the differences between American and Japanese video game consumers, and why American consumers are attracted to certain kinds of video games.

By contrasting the 2009 bestseller lists for Japan and America, I have shown how divergent preferences for multiplayer or single-player video games may depend upon group-identification or individualism. If my interpretation is correct, then the Japanese tendency to play single-player games and the American trend for multiplayer games are based on social structures, and will therefore likely change only when the underlying cultural norms change.

One aspect of Japanese culture I proposed as affecting the success of Japanese video games in America is its high-context status. The importance of context in Japanese society may be an underlying cause for their comparatively elaborate and well-developed storylines in the games they develop. The results of my survey indicate that story is one of the factors that cause American consumers to prefer Japanese over American games. High contextualization may also have a negative effect: if a game is so linear that the player's agency is decreased, it may not appeal to American consumers as strongly as it does to the Japanese. What American developers can learn from this is that they need to improve their

storylines to better compete with Japanese companies, but they should take care to preserve the agency of the player.

American video game consumers can most easily be divided into four groups: male, female, serious, and casual. Female and casual gamers greatly overlap, as do male and serious gamers. Both groups enjoy playing with others, though female and casual gamers more strongly prefer to play in the same room. Male and serious gamers also heavily prefer to play with people they may or may not know online. Female and casual gamers play the Nintendo Wii; male and serious gamers play Microsoft's Xbox 360, but the majority also have regular access to a Wii as well. The similarities and differences between these groups are important to recognize if companies want to exploit larger populations of American consumers.

Like many other industries begun in America, the Japanese have adopted video games, improved them with remarkable technological innovations, and have been selling them back to us for over two decades. But unlike other products, video games are cultural artifacts that represent the countries where they are developed. If American companies want to increase their ability to compete with Japanese developers in the American and global markets, they need to understand how cultural values and societal structures affects their success and how they can exploit awareness of their own culture to better satisfy American consumers.

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