

PlayStation vs Xbox

Next generation of console wars will be like no other

MarketLine Case
Study

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1. Overview

1.1. Catalyst

After seven long years, gaming behemoths Sony and Microsoft have released their highly anticipated next generation of consoles, the PlayStation 5 and the Xbox Series X/S. While the release of these consoles has undoubtedly reignited the fierce competition between the two companies, the release is set to encounter new challenges and opportunities in the face of the COVID-19 pandemic and the success of the consoles will be defined by business models to court customers and generate revenue.

1.2. Summary

In the previous generation of console wars, PlayStation emerged as a clear winner, as a result Xbox will surely be eager to solidify itself as a formidable challenger upon the latest generation of consoles releases. The PS4 received critical acclaim and demonstrated once again Sony's effective strategy of releasing exclusive titles, which was crucial in winning over consumers. While the Xbox 360 was a resounding success, challenging the decade long dominance of Sony, the Xbox One didn't have the same impact and as a result Microsoft is keen on redeeming itself after a resounding defeat.

With little to separate the new consoles specification wise, the success of the PS5 and Xbox Series X will be determined by Sony and Microsoft's differing strategies. As expected, PlayStation has opted for its traditional approach of releasing exclusive content, which has proven highly successful in the past. Xbox on the other hand has skewed its focus toward offering a service in addition to the console itself. Ultimately, PlayStation's tried and true strategy of enticing in gamers with blockbuster titles will likely prove effective once again. However, both consoles will achieve commercial success, boosted by a thriving console market and by the favorable conditions created by the COVID-19 pandemic.

The COVID-19 pandemic has had a profound impact on virtually every market/industry around the globe and the games consoles market is no exception. At the peak of the virus, global lockdowns and stay at home policies induced a surge in console sales, in addition to bolstering digital software sales for major game publishers. The trend of increased demand could continue following the release of next generation consoles, although global economic difficulties could inhibit spending amongst price conscious consumers. Ultimately, the pandemic will make the latest release of next generation consoles the most unpredictable yet.

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2. Sony outperformed Microsoft in the eighth generation of video game consoles

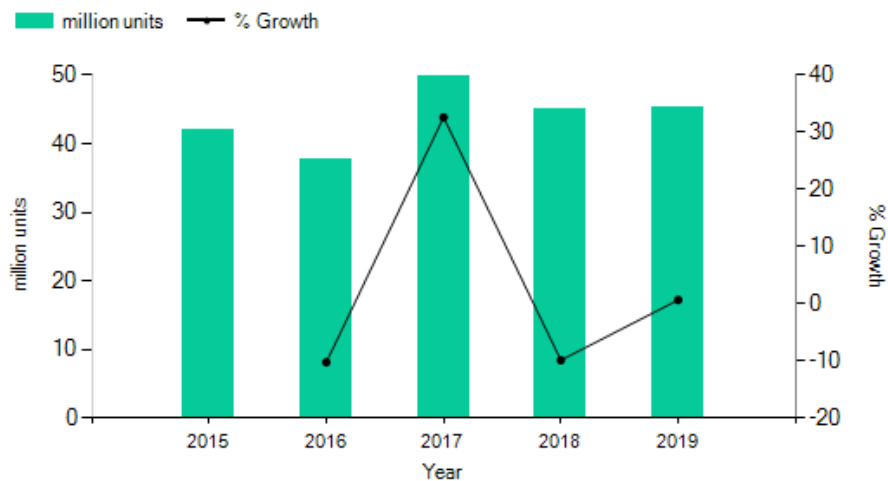
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2.1. The PlayStation 4 has been a major success for Sony

Announced as the successor to the PlayStation 3 in February 2013, the PS4 was launched on November 15, 2013 in North America, November 29, 2013 in Europe, South America and Australia, and on February 22, 2014 in Japan. The console was released to critical acclaim, with critics praising Sony for acknowledging the customer's needs, embracing independent game development, and for not imposing the restrictive digital rights management schemes like those originally announced by Microsoft for the Xbox One.

On November 10, 2016, Sony released the PS4 Pro, marking the first time ever that PlayStation introduced an upgraded console in the midst of a platform's lifecycle. The PS4 Pro leverages the latest imaging technology by supporting dynamic 4K quality resolution. The powerful CPU and GPU of PS4 Pro allows developers to create higher quality games that output dynamic 4K quality graphics with unprecedented visual precision, or smoother and more stable frame rates. As with all PlayStation 4 systems, the PS4 Pro is also compatible with HDR imaging technology that produces more realistic, strikingly vivid visuals that are truer to the way the human eye naturally sees. According to in-house data, in 2017 the number of console units sold globally grew by 32.6% to reach 49.9 million units, of which 20.1 million of those units were of the PS4, suggesting that the release of the Pro was a major contributor to the strong growth registered that year. The release of the PS4 Pro, three years after the release of the original PS4 boosted sales for Sony and as of October 2019, the PlayStation 4 had become the second best-selling console of all time, surpassing the original PlayStation, which sold 102 million units. Just two months later, on December 31, 2019 the console had sold a total of 106 million units, marking another milestone for Sony.

Figure 1: Global games consoles market volume: million units, 2015-19



Source: MarketLine

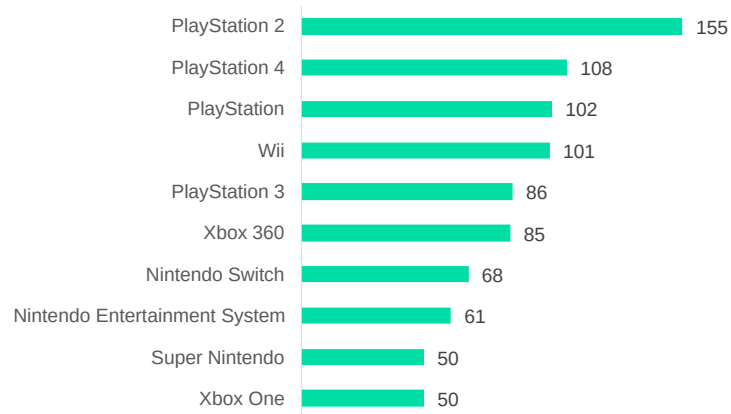
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2.2. The Xbox One's performance has been underwhelming, especially when compared to its predecessor

Announced in May 2013, the Xbox One is the successor to hugely popular Xbox 360 and the third base console in the Xbox series of video game consoles. It was first released in North America, parts of Europe, Australia, and South America in November 2013, and in Japan, China, and other European countries in September 2014. While Microsoft had bold ambitions for the Xbox 360, few within the company anticipated that it would go on to become the most successful Western-made console in history, breaking Sony's 11-year spell of dominance in the market. Its success was largely due to its popularity in the colossal US market.

Microsoft only publicized its sales figures for the Xbox One during the first year after release. The latest official sales figure of 10 million units sold was released in November 2014, with the company announcing in October 2015 that it would no longer publish sales figures for the system. In January 2016, Blake Jorgensen the CFO of Electronic Arts reported during a financial call that the Xbox One has sold "around 18 to 19 million" units, just half of the 36 million units of the PlayStation 4 that Sony claimed at the time. More recently, at Turtle Beach Corporation's Q3 2019 earnings call, Xbox One sales were estimated to have reached around 50 million. While these figures are unconfirmed by Xbox itself, Turtle Beach Corporation is a global gaming accessory manufacturer based in San Diego, California, producing gaming headsets for Xbox, so has a strong insight into the market. The Xbox One's failure has been attributed to Microsoft's inability to ensure a steady flow of solid exclusive games, something which its competitors were able to do. While it did release a select few popular exclusives, including Forza Horizon 4, Gears 5 and Halo 5: Guardians, the quantity is incomparable to that of PlayStation.

Figure 2: Bestselling consoles of all time (millions of units sold)



Source: MarketLine

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2.3. Nintendo also struggled against PlayStation

2012 marked the launch of the Wii U, the successor to its hugely popular Wii console, making it a highly anticipated release. The console was intended to compete against Microsoft's Xbox One and Sony's PlayStation 4. Despite high expectations, the console became perhaps the biggest flop in the 130-year-old company's history, marking a turning point for the brand. Like the 3DS, the Wii U failed to meet Nintendo's sales projections upon its release, and in its lifetime, the console sold just 13.56 million units, dealing a devastating blow to the company. Four years after the console's release, Nintendo made an operating loss of JPY5.13BN (\$48.6m) in the first quarter of its 2016 fiscal year, as Wii U sales plunged 53% year over year.

3. Differing strategies will determine the success of the new consoles

With little to separate the new consoles specification wise, the success of the PS5 and Xbox Series X will be determined by Sony and Microsoft's differing strategies. As expected, PlayStation has opted for its traditional approach of releasing exclusive content, which has proven highly successful in the past. Xbox on the other hand has skewed its focus toward offering a service in addition to the console itself. Ultimately, PlayStation's tried and true strategy of enticing in gamers with blockbuster titles will likely prove effective once again. However, both consoles will achieve commercial success, boosted by a thriving console market and by the favorable conditions created by the COVID-19 pandemic.

3.1. Consoles are almost on par specification wise

In terms of the new consoles themselves there is little to separate them specification wise as has been the case with previous releases. The new Xbox processor is slightly more powerful than that of the PS5, being able to go up to marginally higher clock speeds of 3.8 GHz compared to 3.5GHz. Conversely, the PS5 can push data at 5.5GB per second compared to just 2.4GB per second on Xbox, which could mean marginally faster load times, and less time spent on a loading screen. The Xbox Series X has 1.7 more teraflops, a unit to measure computing speed, on its graphic processing unit (GPU) than Sony's new device, meaning Microsoft does appear to have the edge on paper in terms of computational power. Despite this, differences in the PlayStation GPU architecture may lead to better graphics than the numbers suggest. As a result, the two consoles should be relatively close in terms of overall technological capabilities, therefore the success of each console will be determined instead by the differing strategies each have adopted.

Figure 3: The PS5 and Xbox Series X have been highly anticipated



Source: Techradar

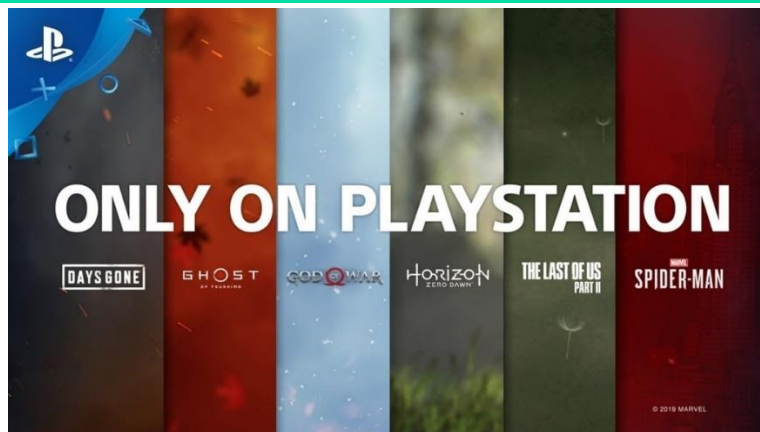
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3.2. Sony is banking on its traditional strategy of exclusivity

Sony has opted for its traditional approach for promoting the PS5, which has proved successful in previous releases. The firm is pushing the exclusivity of games and the console itself through specific new releases in a bid to gain an edge over its competitor. Some of the most popular releases globally in 2018 were Marvel's Spider-Man, God of War and Detroit: Become Human and in 2019, Days Gone and Death Stranding. Other notable exclusive games released since the 2016 include Bloodborne, Horizon Zero Dawn and Uncharted 4. In terms of figures, five of the top 10 best-selling PlayStation 4 games of all-time can't be played on any other console, highlighting the importance of exclusivity in terms of the console's success. Sony's large catalogue of popular exclusive game releases can be considered as one of its major strengths and it is hoping that it will remain so upon the release of the PS5.

Sony's livestream event, "PS5: The Future of Gaming" on June 11 showcased 25 new games, some of which are not available to the Xbox Series X. Prominent examples include Gran Turismo Sport and flagship title Marvel's Spider-Man: Miles Morales. The new Spider-Man game developed by Insomniac Games is a sequel to the hugely successful and critically acclaimed Marvel's Spider-Man, perceived by experts as one of Sony's best exclusive games. The game has thus far received "generally favorable reviews" according to review aggregator Metacritic, receiving a score of 85 based on 62 critic reviews. The hugely popular Demons Souls has also been remade exclusively for the PS5 and was released November 12, 2020 in North America and Oceania and worldwide a week later on November 19, 2020. Its exclusivity to the PS5 will likely lure in its cult following. While it is difficult to determine how many consoles are purchased on the grounds of having access to exclusive content, the success of previous consoles and the popularity of a number of titles released in earlier generations suggests that this strategy will once again position PlayStation strongly against Xbox.

Figure 4: PlayStation has benefited from its critically acclaimed exclusives



Source: PlayStation

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3.2.1. Xbox exclusives remain elusive for the time being

While PlayStation announced a large catalogue of exclusive games at its livestream event, Microsoft has failed to compete with Sony in terms of exclusives. With the exception of Halo, Microsoft has not had success in developing new exclusive franchises, giving Sony the upper hand. Halo Infinite was meant to be the stand out exclusive released alongside the Series X and Game Pass, and was initially set to launch on November 10. However, in August it was delayed until 2021 to the dismay of fans, which could harm console sales in the short term. Piers Harding-Rolls, director at Ampere Analysis games research, suggests that as a result of this Sony will triumph again, with an estimated 66 million consoles sold by the end of 2024, compared to an estimated 37 million for Microsoft. However, Microsoft has recently showed signs of a move toward a more exclusive content

based business strategy. On September 21, 2020 Microsoft made a major acquisition that suggests that a number of blockbuster titles could become exclusive to the console in the future. The company acquired Bethesda's parent ZeniMax Media for a sum of \$7.5bn (GBP5.85bn), the company behind a number of hugely popular titles including Doom, Fallout, Skyrim and Wolfenstein. Xbox has said that the publisher's franchises would be added to its Game Pass subscription package for consoles and PCs. The acquisition of Bethesda makes Game Pass an even better deal, which is, without question, Microsoft's most pivotal priority in its transition into the next console generation. Since 2018, it has made a number of acquisitions, picking up RPG maker Obsidian, Double Fine, and British studio, Ninja Theory.

3.3. PlayStation's DualSense could be a game changer

Another factor which could give PlayStation an edge over Xbox is its new DualSense controller, which has so far received overwhelmingly positive reviews. The DualSense wireless controller offers a range of features including immersive haptic feedback, dynamic adaptive triggers and a built-in microphone, all integrated into an iconic design, which PlayStation says transforms the overall gaming experience. Haptic feedback allows the player to feel physically responsive feedback to in-game actions with dual actuators, which replace traditional rumble motors found in earlier controllers. In a player's hands, these dynamic vibrations can simulate the feeling of everything from environments to the recoil of different weapons. Although some have called this new feature a gimmick, the majority of critics has expressed the opinion that this additional technology offers the immersion and gaming enhancement, which is now needed to make one consoles stand out from one another.

Figure 5: The DualSense controller has received positive reviews



Source: PlayStation

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3.4. Microsoft has opted for a service base approach

Microsoft has looked to a different strategy in increasing the appeal of the Xbox Series X, through promoting extra services alongside the console itself. For example, the firm has been much more proactive in marketing the new Xbox Game Pass than Sony has been with its similar service PlayStation Now. This is mainly due to the new approach with the Game Pass, which is Microsoft's Netflix-style games feature, where for a monthly subscription of \$9.99, users are able to download and play

different games. In addition to this, it is promising that many games will be backwards compatible with the previous generation console, the Xbox One, meaning buyers won't have to buy the new console to access many of these features and will have "thousands of games to play", spanning four generations. Conversely, there is no Game Pass equivalent for new games for the PS5 as Sony's subscription service, PlayStation Now, only includes games from the PS4 and earlier.

Microsoft also has its own cloud gaming platform, xCloud, which offers more than 150 Xbox One and Xbox Series X and S games to be played on Android devices over a data connection. The platform is designed as a complementary service to its new consoles and is available in 22 countries globally. The concept is not a new one, with competitors including PlayStation Now and Google Stadia. However, Microsoft's offering has no additional cost to its existing Xbox Game Pass Ultimate membership scheme. The company has also stated that xCloud is one of the best cloud gaming services around because it utilizes its enormous network of data centers around the world. Jason Ronald, Xbox Series director stated the firm is "really focusing on the player and not trying to force the player to upgrade to an individual device or to make things exclusive to this device or that device" a clear pointed remark to Sony's approach. Despite this user oriented approach, its ability to compete with the range of exclusives Sony offers and convince gamers to switch platforms is questionable. It could be argued that the promotion of backwards compatibility, despite pleasing Xbox gamers, will prevent people from upgrading as there is little need to. Whereas, the promotion of exclusivity by Sony could be more likely to tempt people to spend big.

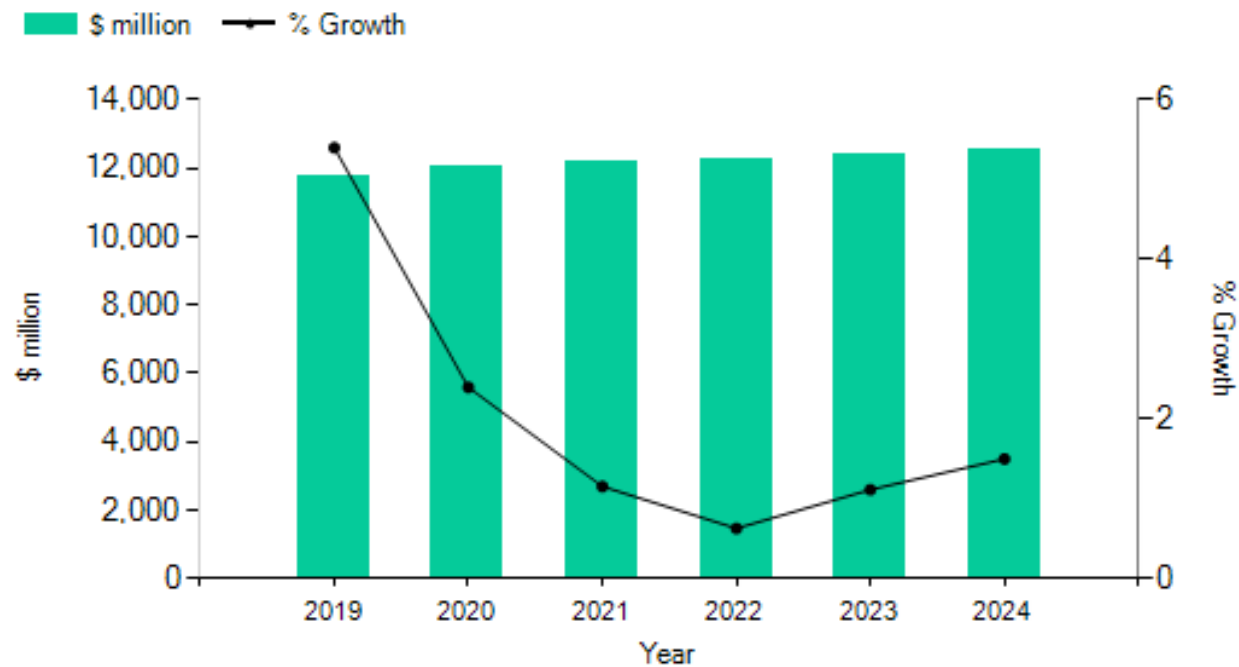
3.4.1. Competitor Google increases its cloud gaming market share during lockdown

Google has used the lockdown as an opportunity to promote its cloud gaming platform, Stadia, which was released November 2019, which could bode well for Xbox. In response to the pandemic, Google announced it would offer Stadia Pro for free for 2 months, removing a \$130 entry fee, allowing totally free access to the cloud streaming platform. Google is relatively new to the video gaming industry; its free tier strategy has allowed the company to take advantage of an increased demand for gaming services during lockdown. Based on Google's success in the cloud gaming field, xCloud could also prove an important feature in attracting customers to purchase the Xbox.

3.5. PlayStation will likely come out on top

Based on previous generations of console wars, it is likely that PlayStation will once again sell the most units in the years following its release. Its tried and true strategy of enticing in gamers with blockbuster titles will prove effective once again, based on the hype and anticipation stirred up by many of the releases and forthcoming releases. Ultimately, consumers rarely buy a console because it has slightly better technical specifications but because it is compatible with the games they want to play. It is also worth noting that Microsoft only relies on its gaming activity for around 10% of its overall revenue, compared to 27% for Sony, which means that is much more motivated to its success in the gaming division. Despite this, both consoles will generate millions of sales in the coming years given the global love of gaming. According to in house research, in 2024, the global games consoles market is forecast to have a value of \$12bn, an increase of 7% since 2019. The compound annual growth rate of the market in the period 2019-24 is predicted to be 1.4%. Strong growth over the forecast period, bolstered by the pandemic, will ensure that PlayStation, Xbox and Nintendo will all have space to excel in the market in the coming years.

Figure 6: Global games consoles market value forecast: \$ million, 2019-24



Source: MarketLine

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4. COVID-19 has had a profound impact on consoles market

The COVID-19 pandemic has had a profound impact on virtually every market/industry around the globe and the games consoles market is no exception. At the peak of the virus, global lockdowns and stay at home policies induced a surge in console sales, in addition to bolstering digital software sales for major game publishers. The trend of increased demand could continue following the release of next generation consoles, although global economic difficulties could inhibit spending amongst price conscious consumers. Ultimately, the pandemic will make the latest release of next generation consoles the most unpredictable yet.

4.1. Console sales surged in the first half of 2020

The unprecedented global economic climate caused by the coronavirus outbreak means markets are not performing as expected, making future performances more unpredictable. The gaming industry has been boosted by the pandemic, with stay at home policies across the world encouraging gaming habits demand has surged as consumers find ways to entertain themselves at home. Even the World Health Organization has advised staying home and playing video games with its 'Play Apart Together' campaign, aimed at producing special events exclusives, activities, rewards, and inspiration across major gaming platforms.

In the US, NPD Group reported that video game sales in March 2020 increased by 34% compared to the previous year whilst spending across the first quarter was up 9% compared to the previous year. It is unusual to see a rise like this in a year when a next-gen console release is expected and can therefore be wholly attributed to the effects of the virus. According to a report published by GSD (Games Sales Data), which tracks software and hardware sales across 17 territories, console sales for the week of March 16 - 22 rose a whopping 155% to 259,169. This surge was across the board between Xbox One, PlayStation 4, and Nintendo Switch, with all three systems seeing a massive boost. In the US, sales of gaming hardware, software and accessories grew 35% to \$1.6bn in March. Sales of gaming consoles including Xbox One, PlayStation 4 and Nintendo Switch rose 63% year-on-year to \$461m in during the same month.

In response to increased demand, console competitor Nintendo reported in April 2020 that it would be ramping up production of its Switch range in order to meet booming demand. Demand for the Nintendo Switch and its hand held counterpart, the Switch Lite has been bolstered by the ongoing COVID-19 lockdown, as consumers seek to escape the bleak reality of being stuck inside. The Japanese game developer has stated that it expects to produce approximately 10% more units of the Switch series in 2020, up from around 20 million last years, in accordance with parts suppliers. This is particularly impressive given that the original Switch was released four years ago, as the performance of a console typically shows a huge growth spurt during the release of new generations of consoles, before demand naturally tapers off. Nintendo Co. Ltd.'s profits surged more than 400% in its fiscal first quarter ended June 30, as demand for the company's Switch console and Animal Crossing video game skyrocketed.

4.1.1. Video games have also seen increased demand

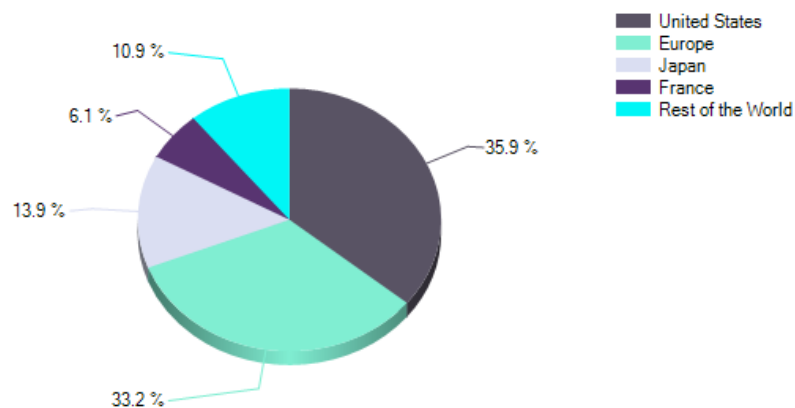
The surge in gaming activity has resulted in video gaming companies as well as console producers experiencing a boost to profits during the first half of 2020. Activision Blizzard's Call of Duty and Electronic Arts' (EA) FIFA, have increased in popularity since lockdown restrictions were put in place. During Q1 2020, Activision exceeded its first quarter outlook generating \$184m in operating income, with an operating margin up 12 percentage points higher to 35%. Sales were driven by Call of Duty: Modern Warfare and Warzone in-game revenues. Activision Blizzard's free-to-download "Call of Duty: Warzone," saw 15 million players in just four days following its launch on 10th March 2020. With more people staying at home, EA experienced, and is continuing to experience heightened levels of engagement. The esports developer doubled its net income to \$418bn in three months ending March 31st 2020.

4.2. Global economic difficulties could inhibit spending amongst some consumers

Despite the initial surge in console sales at the height of the pandemic, demand could peter off as consumers become increasingly weary regarding spending. With global economic difficulty expected and a recent increase in spending on previous generation consoles such as the Xbox One, PS4 and Switch, many consumers are likely to be put off from upgrading their console until deemed absolutely necessary. Major consoles markets across the globe, such as the US, Europe and Japan, are facing great economic uncertainty due to the economic impact of the pandemic. The US is the largest games consoles market globally, accounting for 35.9% of its total value in 2020, as a result the performance of the next generation of consoles lies in their success in the country. The US economy shrunk by 9.5% in the second quarter of 2020, as the social distancing measures implemented created roadblocks for economic activity. The economy is expected to witness an average annual growth rate of 1.15% over 2020–2024. While diehard fans of the latest consoles are likely to make purchases upon their release, many consumers will look to lower-cost avenues for gaming, sticking to older hardware like PS4 and Xbox One, or lower-cost mobile games.

However, Sony have increased production of PS5 consoles in an optimistic move. It had previously aimed for around five million consoles by March 2021 but now intends to reach 10 million. This shows how it is hard to predict how consumers will react to the new consoles, with Sony ensuring that they are prepared if demand spikes. There is undoubtedly a greater audience for consoles than ever before, but whether this audience is ready to make the significant financial outlay to upgrade in the current economic climate remains to be seen.

Figure 7: Global games consoles market geography segmentation: % share, by value, 2019



Source: MarketLine

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4.3. Global pandemic could bolster sales of 'digital' consoles

Due to lockdowns imposed around the globe, gamers have been stuck at home, often unable to visit video game retailers to make purchases and as a result the ability to make one-click digital purchases for instant entertainment has become increasingly appealing. In its July 30 call with investors, Electronic Arts reported that 52% of its full game sales, on consoles, came from online purchases over the preceding 12 months. Similarly, Take-Two Interactive, the parent company of 2K Games and Rockstar Games, told investors on August 3 that 77% of its current generation console game sales were delivered online.

The company also projected that 63% of next quarter's sales will also come digitally, surpassing the 51% figure it saw in the same quarter of 2019. Sony also noted in its call on August 4 that 74% of software unit sales for PlayStation 4 were digital for the preceding quarter, well above the 53% figure of the same quarter in 2019. The pandemic has undoubtedly sped up the inevitable shift to digital, but this has not yet come at the expense of packaged software, which still accounts for a significant proportion of sales.

In addition to the PS5 and Xbox Series X, PlayStation and Xbox have released digital only versions of their consoles, the PS5 Digital Edition Console and the Xbox Series S. The digital only versions of the next-gen consoles are cheaper, which creates a lower barrier to entry for price conscious consumers. The Series S costs \$299 (GBP249.99), which is just over half the price of the Series X, while the PS5 Digital is priced at \$400 (GBP360) and the PS5 at \$500 (GBP450). As digital purchases of games have become increasingly popular amid the pandemic, this may force consumers to reconsider whether they require a console with a disk drive. The cheaper prices combined with the current surge in digital video game sales could bolster the sale of digital edition consoles. On Tuesday September 10, the UK's leading internet providers BT, Virgin Media, TalkTalk, Vodafone, City Fibre and Zen Internet stated that they had all had to cope with a spike in demand on Tuesday. Much of the activity was generated by video gamers downloading large files upon the release on the Xbox Series X and S, suggesting that digital downloads will become increasingly popular going into the next generation.

5. Appendix

5.1. Abbreviations and acronyms

PlayStation 4 - PS4

PlayStation 5 – PS5

5.2. Sources

PlayStation

<https://www.playstation.com/en-gb/ps5/>

ISFE

<https://www.isfe.eu/games-sales-data/>

5.3. Further reading

MarketLine Industry Profile - Global: Games Consoles

MarketLine Industry Profile – Global: Games Software

MarketLine Analyst Insight - Release of next-gen consoles to intensify Sony and Microsoft's rivalry: COVID-19 to cause sales to be unpredictable

MarketLine Analyst Insight - The Nintendo Switch: A turning point in Nintendo's turbulent past decade

6. Ask the analyst

We hope that the data and analysis in this case study will help you make informed and imaginative business decisions. If you have any questions or further requirements, MarketLine's research team may be able to help you. The MarketLine Research team can be contacted at ReachUs@MarketLine.com.

7. About MarketLine

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