

Next-gen Console Purchase Intent, July 2020

In July 2020, market research and video game analytics company VGM surveyed 500 gamers to discover the level of purchase intent in next-gen consoles (i.e., PlayStation 5 and Xbox Series X). Respondents were asked about their purchase intent assuming that each of the next-gen consoles would be in stock at their preferred retailer and sold for the suggested retail price. This particular study is a deep dive into why respondents are motivated to purchase one or both of the next-gen consoles by the end of 2020.

Key takeaways

- Most respondents plan on purchasing one or both of the next-gen consoles in 2020. The PlayStation 5 is a significantly more popular choice than the Xbox Series X, particularly among respondents ages 18-35.
- The most common reason why participants plan on only purchasing the PlayStation 5 is due to their affinity for Sony and/or the PlayStation brand.
- Respondents that only plan on purchasing the Xbox Series X most commonly say it is because they would like to use Xbox-specific subscription programs (e.g., Xbox Game Pass, Xbox Live Games with Gold).
- *Marvel's Spider-Man: Miles Morales* is the console-exclusive title that most often encourages respondents that intend to purchase the PlayStation 5. For those that plan on purchasing the Xbox Series X, the most influential title is *Halo Infinite*.
- The non-exclusive launch titles that most commonly motivate participants that intend to purchase a next-gen console in 2020 are *Call of Duty: Warzone* and *Assassin's Creed Valhalla*.

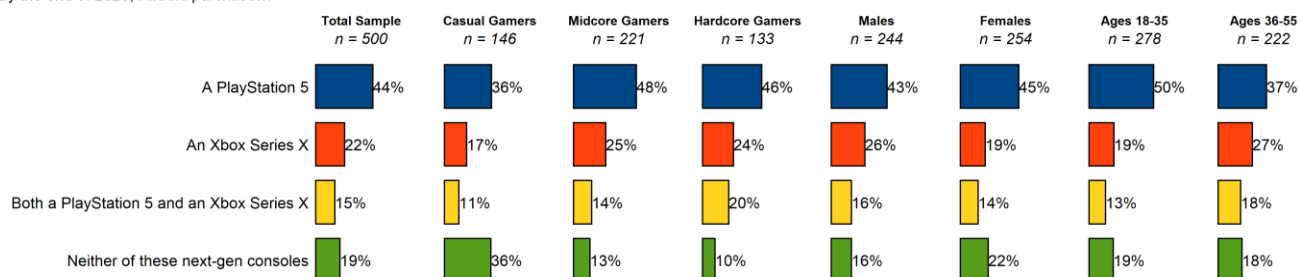
The majority of respondents plan on buying a next-gen console in 2020, with more of them planning to purchase just the PlayStation 5 than just the Xbox Series X

Twice as many respondents only plan on purchasing the PlayStation 5 (**44%**) than respondents that only plan on purchasing the Xbox Series X (**22%**). That difference is most pronounced among respondents ages 18-35, **50%** of which only intend to purchase a PlayStation 5, compared to just **19%** that only intend to purchase an Xbox Series X.

A small percentage of respondents are not planning on purchasing either of these next-gen consoles by the end of 2020 (**19%**); this is most common among Casual Gamers (**36%**), a segment of respondents that self-identify as either "casual" or "very casual" gamers.

Which statement most accurately applies to you?

'By the end of 2020, I would purchase...'

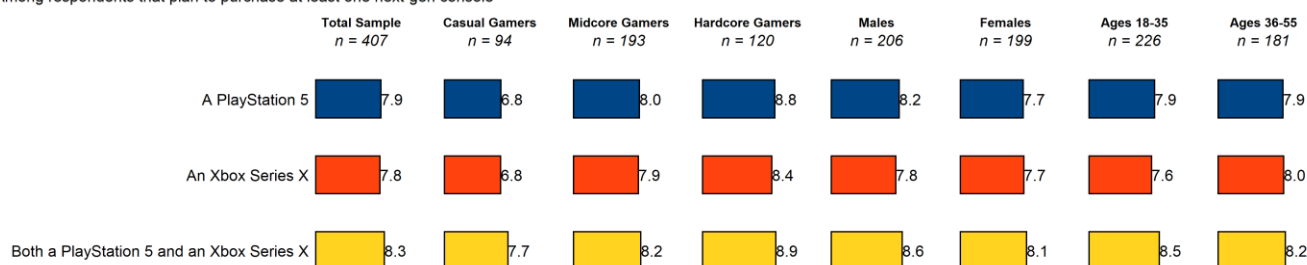


Source: VGM's Next-gen Console Survey Conducted July 2020

Purchase intent is high for both the PlayStation 5 and the Xbox Series X at **7.9** and **7.8 out of 10**, respectively. Hardcore Gamers (a segment of respondents that self-identify as either “hardcore” or “very hardcore” gamers) that intend to buy both next-gen consoles express an especially strong purchase intent (**8.9 out of 10**). Female respondents indicate an equal likelihood for purchasing either a PlayStation 5 or an Xbox Series X (**7.7 out of 10**).

How likely are you to purchase ____ by the end of 2020?

Among respondents that plan to purchase at least one next-gen console



Source: VGM's Next-gen Console Survey Conducted July 2020

Participants that only plan to purchase the PlayStation 5 in 2020 most commonly decide to do so out of an affinity for the Sony and/or PlayStation brand

While fondness for and familiarity with the brand or console family is important for all respondents that plan on purchasing one next-gen console in 2020, this emotional connection is slightly more common among respondents that only intend to purchase a PlayStation 5. **48%** of respondents that only plan on purchasing a PlayStation 5 indicate that one of the reasons for this decision is that they like the Sony and/or PlayStation brand more than the Microsoft and/or Xbox brand. Comparatively, **45%** of respondents that plan on purchasing only the Xbox Series X are doing so in part because of their fondness toward the Microsoft and/or Xbox brand.

- “I’ve always been a Sony fan, no matter what the device is, so I’m keener [on] buying the PlayStation 5 [than] the Xbox Series X.” – 48-year-old male Casual Gamer

- “I’ve been a fan of Sony since the original PlayStation. I’ve had every PlayStation console (or at least one from every generation). I even have a Sony phone.”
– 30-year-old female Midcore Gamer

The ability to use Xbox-specific subscription programs is the most common reason why respondents plan on only purchasing the Xbox Series X, followed by backward compatibility and affinity for the Microsoft and/or Xbox brand

Of the **22%** of respondents that only intend to purchase an Xbox Series X, **48%** say one of the reasons for doing so is that they want to use Xbox-specific subscription programs (e.g., Xbox Game Pass, Xbox Live Games with Gold). In contrast, of the **44%** of respondents that only intend to purchase a PlayStation 5, **25%** say one of the reasons for doing so is that that they want to use PlayStation-specific subscription programs (e.g., PlayStation Now, PlayStation Plus).

- “[I plan on purchasing the Xbox Series X and not a PlayStation 5 in order] to use Game Pass Ultimate and Microsoft Rewards for free games.” – 45-year-old male Midcore Gamer
- “I just prefer the Xbox experience. I’ve been a longtime player and want to stick to the same brand of the console. I enjoy [the] Xbox Live benefits.”
– 41-year-old female Midcore Gamer

Backward compatibility is also important for respondents when deciding on which next-gen console to purchase, particularly for participants that only plan to purchase the Xbox Series X in 2020. **45%** of these respondents say that one reason for their intended-console choice is that they want to be able to play backward-compatible games, compared to **35%** of respondents that only intend to purchase a PlayStation 5 that indicate the same.

- “I already own the Xbox One and I like the thought of being able to possibly play games from the Xbox One on the new console.” – 48-year-old male Hardcore Gamer
- “I have a ton of Xbox games and only a few PlayStation games.”
– 30-year-old male Midcore Gamer

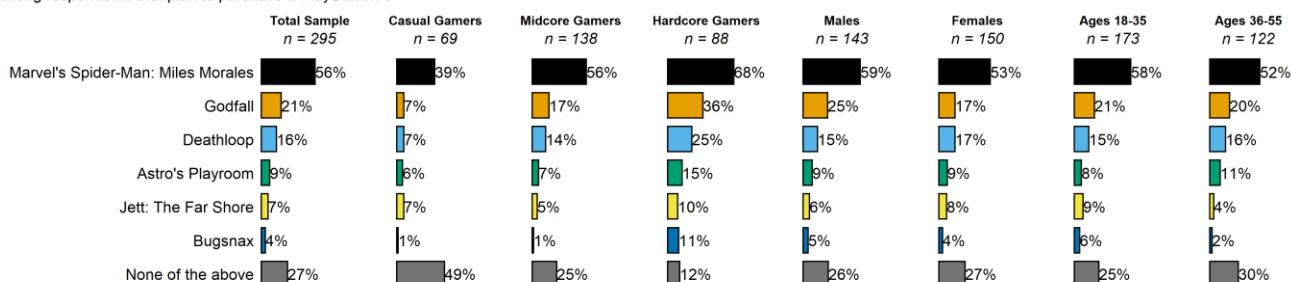
***Marvel’s Spider-Man: Miles Morales* and *Halo Infinite* are the exclusive launch titles that most commonly persuade respondents that intend to purchase a PlayStation 5 or Xbox Series X, respectively**

Marvel’s Spider-Man: Miles Morales is the PlayStation 5 exclusive launch title that is most intriguing to respondents that intend to purchase a PlayStation 5, with **56%** of these respondents stating that this title is encouraging them to purchase the next-gen console.

Meanwhile, *Halo Infinite* is the most intriguing Xbox Series X exclusive title, with **59%** of respondents that intend to purchase the next-gen console indicating that this title is encouraging them to make the purchase by the end of 2020.

Which exclusive launch titles are encouraging you to purchase a PlayStation 5, if any? (Select all that apply.)

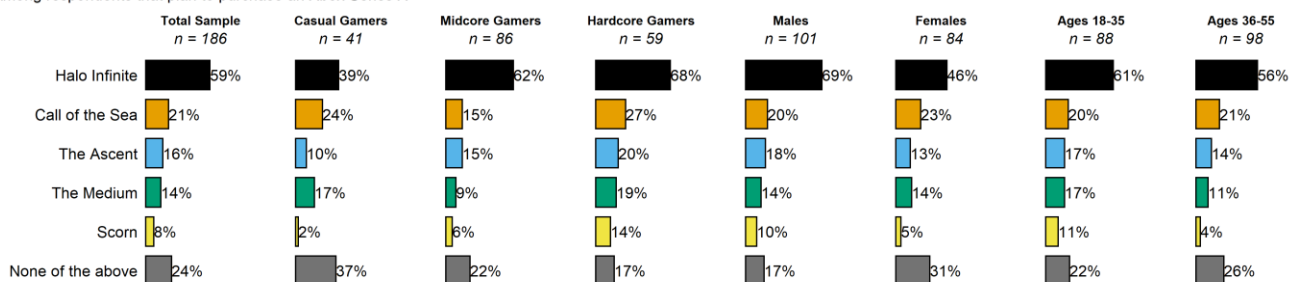
Among respondents that plan to purchase a PlayStation 5



Source: VGM's Next-gen Console Survey Conducted July 2020

Which exclusive launch titles are encouraging you to purchase an Xbox Series X, if any? (Select all that apply.)

Among respondents that plan to purchase an Xbox Series X



Source: VGM's Next-gen Console Survey Conducted July 2020

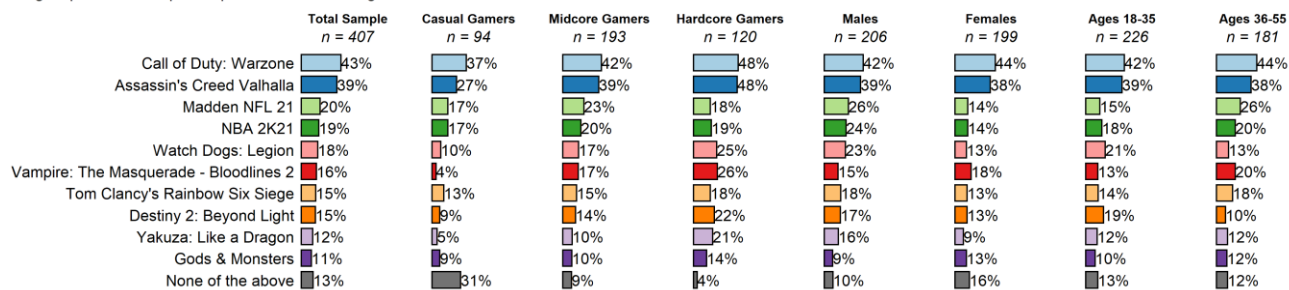
Sole platform exclusivity is a reason given by a few respondents that only intend to purchase the PlayStation 5 as to why they have chosen to purchase the next-gen PlayStation console over the Xbox console. They believe that, in general, PlayStation-exclusive titles can only be played on the respective PlayStation console, while Xbox-exclusive titles can also be played on a PC. This makes these respondents less interested in purchasing an Xbox, as they can play these games on the PCs they may already own.

***Call of Duty: Warzone* and *Assassin's Creed Valhalla* are the non-exclusive launch titles that most often encourage respondents to intend to purchase a next-gen console in 2020**

These two hallmark titles have motivated many respondents to plan to purchase a PlayStation 5 and/or Xbox Series X when they launch. **43%** of respondents state that the recently released *Call of Duty: Warzone* has encouraged them to plan to purchase a next-gen console, and **39%** of respondents are motivated to purchase a console by the upcoming launch of *Assassin's Creed Valhalla*.

Which non-exclusive launch titles are encouraging you to purchase a next-gen console, if any? (Select all that apply.)

Among respondents that plan to purchase either next-gen console



Source: VGM's Next-gen Console Survey
Conducted July 2020

Other games that have motivated players that intend to purchase a PlayStation 5 include *Horizon Forbidden West*, *Grand Theft Auto* titles, and *FIFA* titles. For Xbox Series X purchasers, other motivating titles include *Cyberpunk 2077*, *Forza* titles, *Halo* titles, *Grand Theft Auto* titles, and *Call of Duty* titles.

Methodology

- The VGM Next-Gen Console Survey was conducted during July 2020 using an online sample of 500 respondents within the United States. Respondents were grouped into three segments based on their response to the question, “How would you describe yourself as a gamer?”
 - Casual Gamers: those that answer “casual” or “very casual”
 - Midcore Gamers: those that select the “in between casual and hardcore” option
 - Hardcore Gamers: those that answer “hardcore” or “very hardcore”
- Respondents are representative of the U.S. general gaming population; all those that participated in this study completed a multi-question survey and play video games for at least two hours in a typical week on one or more of the following devices: Nintendo Switch (**36%** of respondents), PlayStation 4 (**55%**), and/or Xbox One (**43%**)
 - **13%** of respondents use both a PlayStation 4 and an Xbox One to play video games for at least two hours in a typical week