From: Ashley McKissick (SHE/HER) 
To: Gaming Experiences & Platforms LT
Subject: Hardware deck
Attachments: Roadmap to 2030 GLT Pre-Read 04-29-22.pdf
ROADMAP TO 2030
Gaming Devices Approach Document
WHY ROADMAP 2030?

Identify a path to our Xbox 2030 goals:

Inform on our go-forward programs, technologies, investments, and devices to drive our growth for the next 10+ years

GOALS FOR TODAY

01 | Update GLT on devices vision & roadmap
02 | Deep dive into mid-gen portfolio
03 | Inform on current gaps to 2030 goals
04 | Feedback to inform prioritization
GAMING DEVICES: PATH TO 2030

CONSOLE BUSINESS IS THE FOUNDATION
Consoles are considered a key health meter for the brand and will continue to drive majority of revenue & subscribers.

NEW ENDPOINTS ARE THE PATH TO 100M MEMBERS
Unlocking new off-console endpoints and improving the experience will substantially grow subscribers over the next 8 years.

CONTROLLER BECOMES THE HERO
The new Xbox controller is the only thing you need to play on every device. This low barrier to entry will fuel subscriber growth.

PERSONALIZATION AND CUSTOMIZATION
Personalization & Customization continue as a hardware strategic advantage and key profit driver and customer delighter

SUSTAINABILITY AND ACCESSIBILITY
Continued progress towards reduction of Carbon Tax impact Re-energizing our journey of inclusion
XBOX GAMING AT XBOX SERIES LAUNCH
THE PATH TO LEADERSHIP IN GAMING

“CLOUD-FIRST” GAMERS
Smart TV/streaming stick apps, low-end PCs, limited Mobile-only

PC-FIRST GAMERS
Gaming PCs on GP for PC

CONSOLE-FIRST + MULTI-DEVICE GAMERS
Console gamers on XGP for Console and XGP Ultimate

XGP SUBSCRIBERS

- Smart TV app
- Universal Wireless Controller
- Mid-gen Consoles
- Gen 10

FY23 FY24 FY25 FY26 FY27 FY28 FY29 FY30
GAMING DEVICES: BUSINESS INNOVATION

Development Model Innovation
- Outsourced Development Model
  - Wireless / Wired Headset
- One Handed Controller
  - Horn Partnership

Platform Development Efficiency
- Headset platform
  - 70% of Norland tools re-used for Englewood
- Controller Platform

Customization in our Core build process
- One Color / One Qual - Two routes to market
- Maximize build efficiency - Starfield Headset
- Re grind and obsolescence mitigation with Feng Huang

Continuity of Supply
- Numerous efforts to ensure stock continued to flow to retail shelves
- Software-based security to alleviate longer term concerns around HW based security chips and cost savings
BROOKLIN – XBOX SERIES X REFRESH

The most powerful Xbox ever, now adorably all digital

Brooklin will deliver 4K Gen9 console gaming with more internal storage, faster Wi-Fi, reduced power, a more immersive controller and a beautiful redesign that elevates the all-digital experience of the Xbox ecosystem.

Updated Technologies
- All-new southbridge to modernize IO and sustainability efforts
- Wi-Fi 6E radio for better throughput, latency, and interference mitigation
- BT 5.2 radio for improved accessory experiences
- 6nm die shrink for improved efficiency

Giving Our Fans More to Love
- Beautiful and innovative new design
- More internal storage for games (2TB)
- USB-C front port with power delivery
- All-new, more immersive controller
- Same great price $499

Improved Sustainability Story
- Reduced PSU power by 15%
- New low-power standby mode is 20% of current XSS standby mode
- Increased use of PCR on housing to >30%
- 100% recyclable packaging
ELLEWOOD – XBOX SERIES S REFRESH

The best value in next gen gaming, once again, undisputed

Ellewood will deliver Gen9 console gaming with more internal storage, faster Wi-Fi, reduced power, and a more immersive controller, all for the same affordable price.

**Updated Technologies**
- All-new southbridge to modernize IO and sustainability efforts
- Wi-Fi 6E radio for better throughput, latency, and interference mitigation
- BT 5.2 radio for improved accessory experiences

**Even More Customer Value**
- More internal storage for games (1TB)
- All-new, more immersive controller
- Same low price $299

**Improved Sustainability Story**
- New low-power standby mode is 20% of current XSS standby mode
- Increased use of PCR on housing to >30%
- 100% recyclable packaging
SEBILE – THE NEW XBOX CONTROLLER

The world’s best controller, now playing on a screen near you

Ubiquity

Play Anywhere
- Xbox Wireless 2
- Direct-to-Cloud
- Bluetooth 5.2

Seamless Pair & Switch
- New mobile app features:
  o See paired devices & cloud
  o Manage devices & accessories

Immersion

Feel the Game
- Precision haptic feedback
- VCA haptics double as speakers
- Accelerometer
- Quieter buttons & thumbsticks

Sustainability

Do Good, Feel Good
- Rechargeable & swappable battery
- Recycled materials and less resin
- Repair and disassembly

Durable & Reliable
- New modular thumbsticks
- Improved longevity
- Continued build improvements

Approachability

Engage & Delight
- Lift to wake

Familiar Xbox Feel
- Same ergonomics as Merlin
- Same layout & activation forces
- SE/LE/XDL options as expected
MID-GEN GOALS

Delight Players | Enable Creators | Unlock Ubiquity

ADDRESS CUSTOMER FEEDBACK
- Increased storage on Series S
- Rechargeable/removable controller battery
- XDL for consoles
- Updated controller with increased immersion

ENABLE RICHER GAMING EXPERIENCES
- Direct-to-Cloud controller
- Get into games quicker with extra IO lanes
- Reduced developer friction
- Fast controller charging via front USB port

MAINTAIN TECHNOLOGY LEADERSHIP & INNOVATION
- All-new Series X design
- All-digital ecosystem
- Up to 80% reduced power in standby
- Wi-Fi 6E for faster downloads

DRIVE GROWTH + COMPETITIVENESS ON CONSOLE
- MSRP$s & distribution flexibility
- Multiple storage options for broader access
- Refreshed ID + more sustainable materials
- BT radio enables more 3P accessories
THE VOICE OF THE PLAYER

“Loving the new storage options and fresh look of Xbox Series X – but the real highlight is the new controller – awesome new haptics, rechargeable battery, and I can connect it directly to the cloud”

“Xbox has made buying my games digitally as easy & affordable as discs – plus I can play those games on multiple devices I already own. I don’t miss my disc drive at all.”

“I feel like Xbox really knows me, giving me tons of options, ways to customize and personalized suggestions.”

“It’s important to me that the companies I support take sustainability seriously – and Xbox does”
LAUNCH TIMELINES

May | Jun | Jul | Aug | Sep | Oct | Nov | Dec
---|---|---|---|---|---|---|---
FY24 | FY25

XBOX GAMING BEAT

SEBILE LAUNCH $69.99

Sebile announce in FY24 Q4

- 60 day+ separation between launches enables dialog with different audiences
- Allows us to focus on new improvements in Sebile, tell stories beyond console (DtC)
- Adds value to Brooklin & Ellewood atannounce
- Gives Ellewood its own ‘moment’ earlier in the holiday timeframe to maximize sales
- Last Chance Edith 512GB @ $199 as Black Friday offer before EOL
- Starkville EOL ahead of Brooklin launch
- Brooklin arrives just in time for the gifting season but separate from Ellewood

Ellewood 1TB LAUNCH $299

Mid-Gen Console Announce Ellewood and Brooklin announced simultaneously

Brooklin 2TB LAUNCH $499

Additional storage options announced/available in FY25 H2
# MID-GEN DEVICES LINE-UP: DELIVERING ON PLAYER NEEDS

<table>
<thead>
<tr>
<th></th>
<th>XBOX SERIES S</th>
<th>XBOX SERIES X</th>
<th>XBOX SERIES X in XDL</th>
<th>XBOX UNIVERSAL CONTROLLER</th>
<th>XBOX UNIVERSAL CONTROLLER in XDL</th>
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<tbody>
<tr>
<td><strong>Codename</strong></td>
<td>Ellwood</td>
<td>Brooklin</td>
<td>Uther</td>
<td>Sebile</td>
<td>Igraine</td>
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<tr>
<td><strong>GPU TF + Target Res</strong></td>
<td>4TF + 1440p</td>
<td>12TF + 4K</td>
<td>12TF + 4K</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>RAM</strong></td>
<td>10GB</td>
<td>16GB</td>
<td>16GB</td>
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<td>-</td>
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<tr>
<td><strong>Physical Storage</strong></td>
<td>512GB / 1TB</td>
<td>1TB / 2TB</td>
<td>1TB / 2TB</td>
<td>-</td>
<td>-</td>
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<tr>
<td><strong>Content Delivery</strong></td>
<td>All digital</td>
<td>All digital</td>
<td>All digital</td>
<td>-</td>
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<tr>
<td><strong>Connectivity</strong></td>
<td>- Wireless 2</td>
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<td>- BT 5.2</td>
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<td></td>
<td>- 3x USB-A</td>
<td>- 1x USB-C</td>
<td>- 1x USB-C</td>
<td>- 2x USB-A</td>
<td>- 2x USB-A</td>
</tr>
<tr>
<td><strong>In-box Accessories</strong></td>
<td>- Sebile</td>
<td>- Sebile</td>
<td>- Sebile</td>
<td>- Bonnie</td>
<td>- Bonnie / Bonnie Pro</td>
</tr>
<tr>
<td></td>
<td>- USB-C to A cable (0.5m)</td>
<td>- USB-C to C cable (0.5m)</td>
<td>- USB-C to C cable (0.5m)</td>
<td>- USB-C to A cable (0.5m)</td>
<td>- USB-C to A cable / USB-C to C cable (0.5m)</td>
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<tr>
<td><strong>Sustainability</strong></td>
<td>Enhanced</td>
<td>Enhanced</td>
<td>Enhanced</td>
<td>Enhanced</td>
<td>Enhanced</td>
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<tr>
<td><strong>ID Refresh</strong></td>
<td>Light</td>
<td>All-new</td>
<td>All-new</td>
<td>Large</td>
<td>Large</td>
</tr>
</tbody>
</table>
**MID-GEN (FY25-27) SCENARIOS**

### DELIVER FULL FAIRHAVEN VISION

**CONSOLES**
- New storage options
- Refreshed ID
- Fully-featured Sebile bundled-in

**3-YEAR VOLUME:** 29M  
**FY27 MAD:** 59M

**CONTROLLERS**
- Fully-featured Sebile (BOP’d product)
- Refreshed Elite line
- DIC enabling growth in Cloud end-points

**3-YEAR VOLUME**: 80M  
**3-YEAR GM**: $1.5Bn

### LIMIT FAIRHAVEN INVESTMENT

**CONSOLES**
- New storage options
- Refreshed ID
- Pared down Sebile bundled-in

**3-YEAR VOLUME:** 25M (-4M)  
**FY27 MAD:** 56M (-3M)

**CONTROLLERS**
- Pared down Sebile (features shaved to GM%)
- No Elite business (Delphi EOL in FY25)
- Limited attach to Cloud end-points

**3-YEAR VOLUME**: 56M (-24M)  
**3-YEAR GM**: $1.1Bn (-$0.4Bn)

*Note: (*) Baseline volumes and GM without Branded upside; Sebile BOP per-unit Financials assumptions; Elite products held at current volume and GM/u assumptions*
CURRENT GAPS IN FY23 TO REACH 2030 GOALS

Not in Scope for 1st party

Not Currently Funded/Resourced

Funded

- Earbuds
- Media Remote
- Mobile Controller
- Handheld
- Elite Controller (Actium)
- Luxury Controller (Zarasai)
- Console Customization via XDL (Uther)
- PC Accessories
- Accessibility Portfolio
- New Cloud Server blade
- Repairability / Sustainability Progress
- Audio portfolio expansion (Waterloo / Mills)

- Cloud Console (Keystone)
- Gen 10 Investigations
- Mid-gen Consoles (Ellenwood/Brooklin)
- Wireless Headset 1.5 COS (Parkview)
- Core Controller (Sebille)
- SW Security - QCOM DAWN module (Mousatee)
- Xbox Design Lab & SE/LE for mid-gen controller (Igraine)
OPEN ITEMS

**Watch List**
- Sebile full product vision not currently approved due to GM % (Finance)
- Launch timing for Sebile & Ellewood (Gaming Devices + xCloud DTC)
- USB front port inconsistencies on consoles – impacts accessories cable (Gaming Devices)
- 1P game content moment, timed with release, still TBC (Studios)

**Key Product Gaps**
- Elite Controller category (Actium) not funded; LRP at risk (Gaming Devices)
- Mid-gen personalization (XDL Console) not funded (Gaming Devices)
**NEXT STEPS**

01
GLT Feedback on Devices Approach

02
Follow-up with Phil & Tim on priorities & resources

03
Finalize go-forward roadmap, and kick-off collaboration work with teams