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To: Gaming Experiences & Platforms LT
Sent: 5/2/2022 9:29:58 PM
Subject: Hardware deck
Attachments: Roadmap to 2030 GLT Pre-Read 04-29-22.pdf



ROADMAP TO 2030

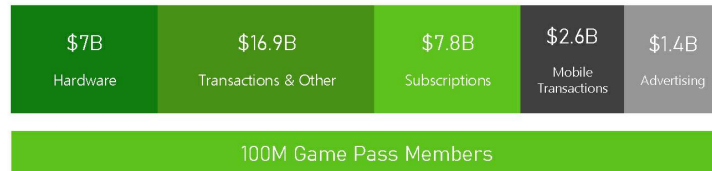
Gaming Devices Approach Document

Gaming LT  Gaming Devices LT  Devices Marketing LT

05.02.22

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

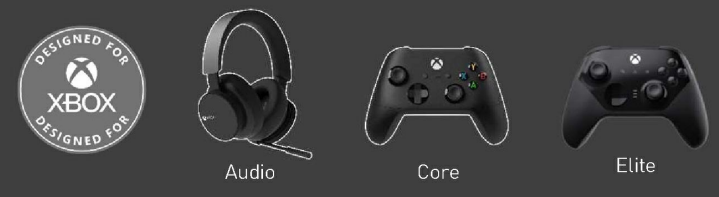
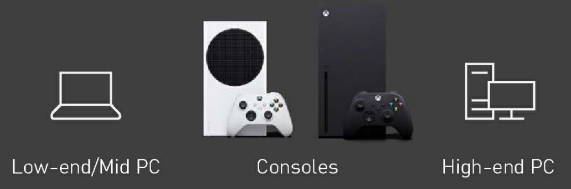
Personalization & Customization continue as a hardware strategic advantage and key profit driver and customer delighter

SUSTAINABILITY AND ACCESSIBILITY

Continued progress towards reduction of Carbon Tax impact
Re-energizing our journey of inclusion



XBOX GAMING AT XBOX SERIES LAUNCH



XBOX GAMING TODAY



Browser



Mobile
(Android & iOS)



Smart TVs



Low-end/Mid PC



3P Streaming
Sticks &
Set-Top-Boxes



Cloud
Device



Consoles



High-end PC



Cloud Blade



Audio



Core



Elite

Sustainability 

Accessibility 

XBOX GAMING BEYOND



Browser



Mobile (Android & iOS)



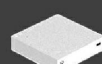
Smart TVs



Low-end/Mid PC



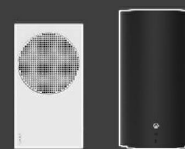
3P Streaming Sticks & Set-Top-Boxes



Cloud Device



Handheld



Consoles



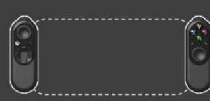
High-end PC



Cloud Blade



One-hand Controller



Mobile Controller



Audio



Core




Premium



Elite

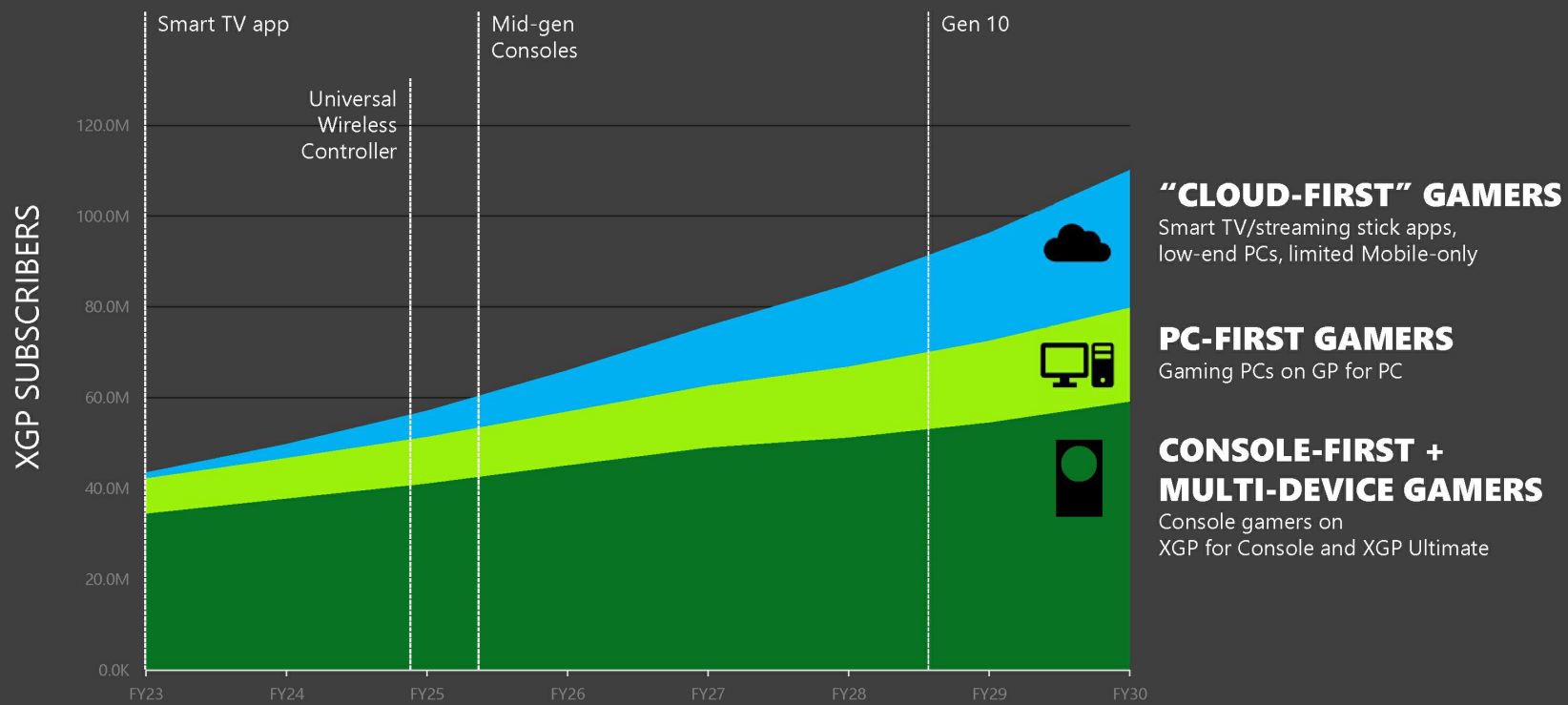


Gaming Keyboard & Mouse

Sustainability 

Accessibility 

THE PATH TO LEADERSHIP IN GAMING



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
- Regrind 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.

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



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

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

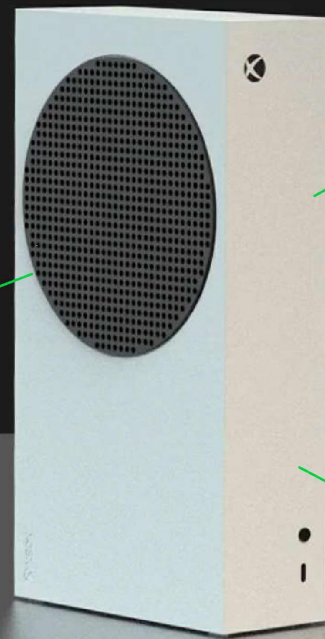
ELLEWOOD – XBOX SERIES S REFRESH

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.

Even More Customer Value

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



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

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:
 - See paired devices & cloud
 - 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

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

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

DRIVE GROWTH + COMPETITIVENESS ON CONSOLE

- MSRPs & distribution flexibility
- Multiple storage options for broader access
- Refreshed ID + more sustainable materials
- BT radio enables more 3P accessories

THE VOICE OF THE PLAYER



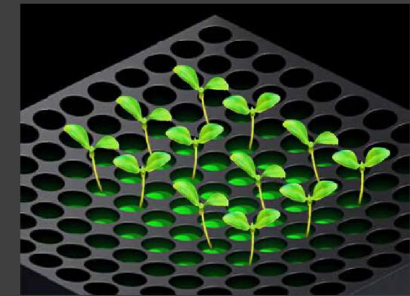
*"Loving the new storage options and fresh look of Xbox Series X – but the **real highlight is the new controller** – awesome new haptics, rechargeable battery, and I can connect it directly to the cloud"*



*"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."*

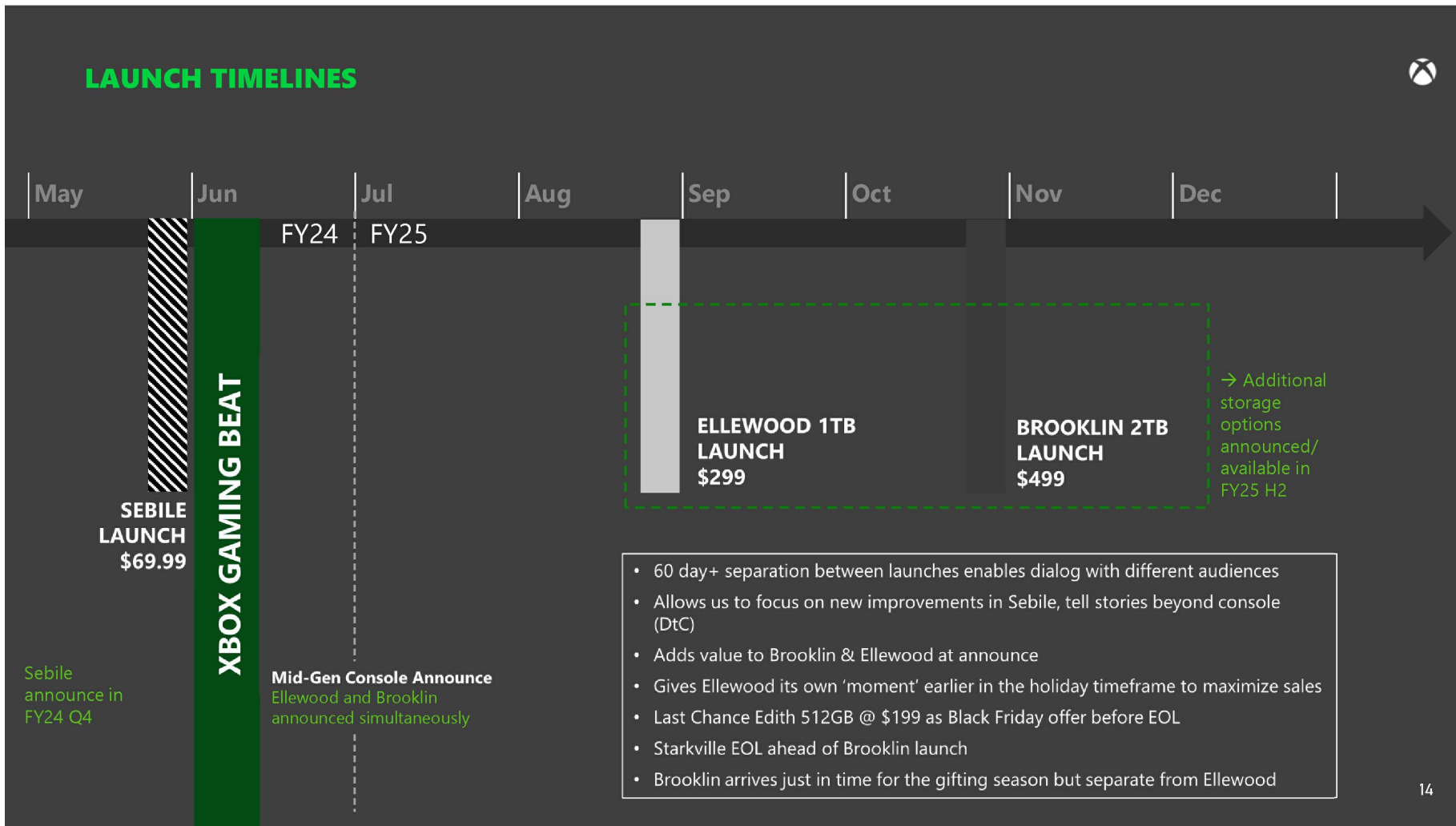


*"I feel like Xbox really knows me, giving me tons of **options, ways to customize and personalized suggestions**"*



*"It's important to me that the **companies I support take sustainability seriously** – and Xbox does"*

LAUNCH TIMELINES



- 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 at announce
- 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

MID-GEN DEVICES LINE-UP: DELIVERING ON PLAYER NEEDS



	XBOX SERIES S	XBOX SERIES X	XBOX SERIES X in XDL	XBOX UNIVERSAL CONTROLLER	XBOX UNIVERSAL CONTROLLER in XDL
Codename	Ellewood	Brooklin	Uther	Sebile	Igraine
GPU TF + Target Res	4TF + 1440p	12TF + 4K	12TF + 4K	-	-
RAM	10GB	16GB	16GB	-	-
Physical Storage	512GB / 1TB	1TB / 2TB	1TB / 2TB	-	-
Content Delivery	All digital	All digital	All digital	-	-
Connectivity	<ul style="list-style-type: none"> • Xbox Wireless 2 • BT 5.2 • Wi-Fi 6E • 3x USB-A 	<ul style="list-style-type: none"> • Xbox Wireless 2 • BT 5.2 • Wi-Fi 6E • 1x USB-C • 2x USB-A 	<ul style="list-style-type: none"> • Xbox Wireless 2 • BT 5.2 • Wi-Fi 6E • 1x USB-C • 2x USB-A 	<ul style="list-style-type: none"> • Xbox Wireless 2 • BT 5.2 • Direct-to-Cloud 	<ul style="list-style-type: none"> • Xbox Wireless 2 • BT 5.2 • Direct-to-Cloud
In-box Accessories	<ul style="list-style-type: none"> • Sebile • USB-C to A cable (0.5m) • HDMI cable • Power cable 	<ul style="list-style-type: none"> • Sebile • USB-C to C cable (0.5m) • HDMI cable • Power cable 	<ul style="list-style-type: none"> • Sebile • USB-C to C cable (0.5m) • HDMI cable • Power cable 	<ul style="list-style-type: none"> • Bonnie • USB-C to A cable (0.5m) 	<ul style="list-style-type: none"> • Bonnie / Bonnie Pro • USB-C to A cable / USB-C to C cable (0.5m)
Sustainability	Enhanced	Enhanced	Enhanced	Enhanced	Enhanced
ID Refresh	Light	All-new	All-new	Large	Large

MID-GEN (FY25-27) SCENARIOS



DELIVER FULL FAIRHAVEN VISION

LIMIT FAIRHAVEN INVESTMENT

CONSOLES



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

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

New storage options
Refreshed ID
Pared down Sebile bundled-in

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

CONTROLLERS



Fully-featured Sebile (BOP'd product)
Refreshed Elite line
DtC enabling growth in Cloud end-points

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

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

Earbuds
Media Remote
Mobile Controller
Handheld

Not Currently Funded/Resourced

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)

Funded

Cloud Console (Keystone)
Gen 10 Investigations
Mid-gen Consoles (Ellewood/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

