Mind games: How Sony and Microsoft play the Dutch gamers

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Executive summary

The research of this report revolves around the question: *'due to what reasons do Dutch consumers buy a PlayStation 4 or Xbox One, and how is this decision affected by strategies used by Sony and Microsoft?'* This research was conducted to find out how these two companies defend their positions in the gaming industry, which is continuously developing. This research is based on two theoretical areas. The first area is consumer behaviour, which revolves around everything that drives consumers to buy certain products. The second area involves marketing strategies used by companies to affect and shape this behaviour. Consumer behaviour is generally formed by internal factors (psychological and personal factors) and external factors (cultural and sociological factors). This research focused its attention on the internal factors of consumer behaviour, including personality, lifestyle, knowledge, perception, attitude and motivation. In terms of marketing strategies, the research analyses the marketing stimuli that companies use to influence the internal factors. These stimuli correspond with the standard marketing mix, including price, product, promotion and place (distribution).

Several research techniques were used to gain the necessary information for this report. This includes desk research to acquire information about consumer behaviour, and field research in the form of interviews and a survey to gather information about the strategies of Sony and Microsoft. Looking at the strategies, Sony has been more active in the Netherlands than Microsoft. The PlayStation 4 secured its place through aggressive promotion, while Microsoft entered the Dutch market a year later without any promotional tools other than the sales advertisements by retailers. Additionally, the PlayStation 4 was lower in price than the Xbox One. Based on the answers given by respondents of the survey, it became clear that most of them were motivated to buy a new console because they wanted to replace their old ones. The price of the consoles has also influenced motivation, especially the price of the PlayStation 4. Moreover, the product and price strategies also influenced consumer attitudes, while promotion influenced attitudes of Dutch gamers to a lesser extent. Although the Xbox One did not use heavy promotion, respondents still claimed to have received information through commercials, most likely online.

Sony claimed a strong position in the Dutch market, but should not get overconfident. Microsoft has integrated their console with various sport organisations and offers a larger variety of applications on their machine. Sony should attempt to expand the applications on their console as well. If Microsoft wishes to gain more success, they should start focusing on advertising their console various target groups instead of only core gamers, for example families. Both companies should keep in mind that the competition in the market is increasing due to mobile gaming, and that tech trends such as virtual reality should not be their main concern. Instead, Sony and Microsoft should be focusing on keeping up with the latest consumer behaviour trends.

Table of contents

1. Introduction

The gaming industry is one of the most dynamic industries of contemporary society. Continuous changes in technology require companies to alter their products to meet the ever-changing needs and wants of their consumers. The gaming industry is not kind to those who fall behind, which has resulted in the downfall of multiple companies that once had a relevant position in the market. One who truly loves games can only cringe when remembering the flopped console Sega Saturn, which eventually led to Sega leaving the console market entirely (Hargreaves, 2013). While console gaming used to rule the industry, it seems that the heyday of consoles is slowly coming to an end. Some analysts go as far as to declare that console gaming is already dead (Hachman, 2013). However, a spark of hope remains for console gaming as two companies are fighting an all-out war to hold their ground within the industry they once dominated; namely Sony and Microsoft.

Sony and Microsoft are two of the most prominent names in the modern gaming industry. Both companies have been fulfilling a leading role on the console market in the last decade. Sony first entered the console market in the year 1994 with the original PlayStation, and has claimed a strong position in the market ever since (Kohler, 2014). Microsoft, a company that originally ruled the computer software market, decided to use the knowledge and expertise it had gained to penetrate the console market as well. The first attempt to do so was with the Microsoft Xbox, a console that was released in the year 2001. At that time the console market was almost completely dominated by Japanese companies Sony and Nintendo, which proved to be too much of a threshold for the new American challenger. Although the original Xbox was intended to be a direct rival of the immensely popular PlayStation 2, it failed to live up to the hype it had created around itself (Garratt, 2011). Microsoft was not ready to give in and designed a new and improved console using information gathered from previously made mistakes. This new console was named Xbox 360, which was a major game-changer which marked the instigation of the modern console war.

Nowadays the console war is taking an alternate form, as new platforms of gaming are entering the industry. Video game consoles are no longer a mandatory choice for people who wish to play video games, as pc-gaming has managed to establish a strong position and new platforms such as mobile gaming are on the rise (Takahashi, 2014). With the recently released PlayStation 4 and Xbox One, Sony and Microsoft are aiming to influence the behaviour of their consumers, showing that console gaming is still very much alive (Callahan, 2013).

1.1 Problem statement

To combat the new threats which are entering the videogame industry, it is necessary for both Sony and Microsoft to adapt their strategies. Furthermore, the game industry is currently experiencing some serious changes, which will undoubtedly affect the consuming behaviour of the gamers

(Raymundo, 2015). In the words of Robert D. Blackwell, "consumer behaviour is the activities people undertake when obtaining, consuming and disposing of products and services," (Blackwell, Miniard, & Engel, 2005). In a world that is continuously developing, so are the needs and wants of consumers, thus changing the consumer behaviour process as well. The main issue for Sony and Microsoft is how they will respond these changes, and what types of strategies they will use to do so.

1.2 Research question and sub-questions

To gain a better understanding of the consumer behaviour of Dutch gamers, and how Sony and Microsoft are implementing their strategies to affect this behaviour, the following research question is to be answered: *due to what reasons do Dutch consumers buy a PlayStation 4 or Xbox One, and how is this decision affected by strategies used by Sony and Microsoft?'*

To aid with the answering of this central question, the following sub-questions are formulated:

- What factors influence consumer behaviour?
- What strategies are used in marketing?
- What strategies are utilised by Sony and Microsoft and which factors of consumer behaviour are they affecting?

1.3 Scope

Due to the vast amount of theories that reside within the consumer behaviour concept, it is near impossible to analyse each aspect. Therefore the research focuses on several specifically chosen theories to reach its conclusions. The same method is applied to the concept of marketing; the theories that are deemed most fitting and valuable are used in the research. The exact theories used are explained in more detail in their respective chapters. Since it is a difficult task to measure the consumer behaviour of all individuals in the world, the research mainly focuses on the Dutch consumer market, more specifically Dutch gamers. A second reason is that the Dutch market is the most logical market to analyse, as this research is conducted in the Netherlands. The greater level of accessibility is useful because of the limited amount of time for conducting the research.

1.4 Relevancy

There are various ways in which this research is relevant. Academically, this research gives more detailed insights in how specific marketing theories may affect (or not affect) various aspects of consumer behaviour. Additionally, it presents how two multinational corporations are coping with new challenges and changes within the industry they are operating in. The actions undertaken by Sony and Microsoft may be useful as references for other companies in the same industry or perhaps even in other industries. This research also opens doors for future research on how Sony and Microsoft must continue to adapt to their environment. The research may also be interesting for students who wish to do a thesis on consumer behaviour or marketing strategies, analysts of the gaming market and even gamers who are interested in the developments within the industry.

1.5 Research structure

The second chapter of the report discusses the theories of consumer behaviour that are relevant for this research. This chapter will give a full explanation of the theories and models based on literary research. The third chapter follows the same structure as the second one, but revolves around theories of marketing instead. The combined theories of chapters two and three result are implemented in the fourth chapter. This chapter presents a framework that contains the theories discussed in previous chapters, and provides a justification for this framework. The framework is accompanied by the methodology of the research, explaining which methods of research have been used to reach the conclusions. The fifth chapter is a case study of the companies Sony and Microsoft, providing some general information about the companies followed by the application of theories from the chapters two and three. The data gathered in the case study result in the conclusions and further recommendations.

2. Theories of consumer behaviour

2.1 Scope

This chapter revolves around the theories of consumer behaviour that are important for the research. The basic principles of consumer behaviour theory state that there are four main factors influencing the behaviour of an individual. An overview of these factors is given by Perreau (2013), who defines them as cultural factors, social factors, personal factors and psychological factors. The first two factors are known as external factors, as they are influences that come from outside the individual. The culture of a person for example is not internally generated, but rather taught to them by others. The other two categories are known as internal factors. These factors are formed internally by each unique individual. Although the last two categories are internal, they can be influenced to a certain degree by external factors. Personal factors include things such as personality, demographic factors and lifestyle. Psychological factors are formed by things as motivation, knowledge and attitudes. (Perreau, 2013)

The focus of this research is aimed towards the internal factors of influence. The primary goal of this research is to uncover how the internal thought process of individuals is affected by the marketing strategies of Sony and Microsoft, not how the companies are trying to reach their target audience through the manipulation of external parties. Furthermore, Dutch culture is more dynamic rather than static because of the large amount of foreign influences (Solomon, Bamossy, Askegaard, & Hogg, 2006), which makes it a difficult to measure factor within the limited amount of time. Additionally, the reason why internal factors are chosen rather than external factors is because the internal factors start the entire process of consumer behaviour. As soon as a person witnesses something for the first time, he or she forms an opinion about particular thing. External factors such as family and friends come into play later on in the process. External factors such as family and friends may influence the decision of a person in terms of buying a console, but the internal factors ultimately lead to the decision a person makes.

The aspects that form the internal factors can be found within the mind of the individual. Psychological studies of consumer behaviour tend to see the human mind as a ‘black box,’ and focus on observable aspects of human behaviour. These aspects consist of certain stimuli that go into the box (input), and the responses that come out of the box as a result of those stimuli (output) (Solomon, 2004). The goal of the input is to affect the ‘contents’ of the black box to reach a desirable outcome when reaching the final stage: the response of the buyer (Sandhusen, 2008).

The contents of the black box are divided into two areas: buyer characteristics and the decision-making process. The buyer characteristics are formed by several personal and psychological aspects, namely personality, attitudes, motivations, knowledge, lifestyle and perceptions. The decision-making process simply refers to the steps a consumer takes before, during and post-purchase. This chapter focuses on defining the psychological and personal aspects within the black box of the consumer. The personal factors influencing consumer behaviour are categorised by using various models specifically created for these factors. The psychological factors are simply analysed, and this research focuses on how they can be influenced by marketing strategies. This difference in methods is justified by the fact that personal factors can hardly be affected by marketing strategies.

2.2 Personal aspects

2.2.1 Personality

According to Blythe (2013), the personality of a person is "… the collection of individual characteristics that make a person unique, and which control an individual's responses and relationship with the external environment. It is a composite of subordinate processes, for example attitude, motivation and perception. It is the whole of the person, and is the system that governs behaviour rather than the behaviour itself." Personality is a somewhat controversial topic within psychology, as some psychologists argue about the existence of personality in its entirety. Solomon (2004) explains that multiple studies have found out that people do not seem to possess stable personalities. Some argue that, since people react differently in various situations, personality is nothing more than a tool to categorise people. The validity of this statement is somewhat flawed, as people only see one another in a limited set of situations. Since individuals respond fairly consistently within this set of situations, it is possible to form generalized patterns of how people cope with the world (Kassarjian & Robertson, 1981). Even though not all psychologists have rejected the concept of personality, many of them have recognized that situational factors play a vital role in determining behaviour (Aronoff & Wilson, p. 188).

There are three major theories of personality in terms of consumer behaviour. These are the Freudian Theory, the Neo-Freudian theory and the trait theory. In the words of Schiffman, Kanuk and Hansen (2011), the Freudian theory is based on the analysis of psychoanalyst Sigmund Freud, who claimed that human personality is built from three interacting systems. The theory essentially states that behaviour comes from primal human instincts. The Neo-Freudian theory follows a different approach, stating that social relationships are the key to forming and developing a personality. Psychoanalyst Karen Horney supported this theory and proposed that people can be divided into three personality groups (Horney, 1937). Three groups of people is a rather limited observation though, which makes it unfit for this research.

The third major theory is named the multiple trait theory. As opposed to the Freudian and Neo-Freudian theories, the trait theory has a more empirical and quantitative approach; the focus lies on measuring personality in terms of psychological characteristics, which are defined as traits (Schiffman, Kanuk, & Hansen, 2011). Research has produced a variety of measurable personality traits over the course of time. This has resulted in a five-factor model, which identifies five broad dimensions of personality. These dimensions are often described as openness/intellect, conscientiousness, extraversion, agreeableness and neuroticism (OCEAN). When all three theories are compared, the trait theory is deemed as the most useful of all (Kardes, Cronley, & Cline, 2014).

Those who score low…	**Dimension**	**Those who score high…**
	Openness/intellect	
Unintellectual Unintelligent Unimaginative Uncreative Simple Unsophisticated Unreflective		Intellectual Creative Complex Imaginative Bright Philosophical Artistic
	Conscientiousness	
Disorganised Careless Unsystematic Inefficient Undependable Impractical Negligent Inconsistent		Organised Systematic Thorough Practical Neat Efficient Careful Steady
	Extraversion	
Introverted Shy Quiet Reserved Untalkative Inhibited Withdrawn Timid Bashful		Extraverted Talkative Assertive Verbal Energetic Bold Active Daring Vigorous

	Agreeableness	
Cold Unkind Unsympathetic Distrustful Harsh Demanding Rude Selfish Uncooperative		Kind Cooperative Sympathetic Warm Trustful Considerate Pleasant Agreeable Helpful
	Neuroticism	
Anxious Moody Temperamental Envious Emotional Irritable		Unenvious Unemotional Relaxed Imperturbable Unexcitable Undemanding

Table 1: Five-Factor model of Personality. Altered version of Goldberg, L.R. (1992). The Development of Markers for the Big Five-Factor Structure. *Psychological Assessment, 4, 26-42.*

As shown in the table above, the multiple trait theory makes it possible to create a variety of personalities. The multiple personality trait method is not without its flaws though, and it has been criticised for leaving out other important factors such as masculinity vs. femininity, religion, humour and sexiness (Paunonen & Jackson, 2000). Although the model may not cover each possible personality trait known to man, it is arguably the model that offers the most varieties of personality, making it a useful tool for this research. It allows the categorisation of the gamers in the Dutch industry that is not too broad, but certainly not too limited either.

2.2.2 Lifestyle

Lifestyle studies, also referred to as psychographics, concern the values of people and their approaches to life (Blythe, 2013). In the words of Solomon (2004) "…lifestyle refers to a pattern of consumption reflecting a person's choices of how he or she spends time and money." The way a person tends to live affects their consumer behaviour significantly. For example, an individual who aspires to follow a healthy lifestyle will change his or her buying behaviour to match this particular lifestyle. For marketers and advertisement planners lifestyle marketing has become an invaluable concept (Wells & Tigert, 1971).

What makes lifestyle such an important part of marketing is the fact that it can give marketers a much more detailed profile of a target group. Another form of segmentation, for example demographic segmentation, sketches an image of a consumer in terms of age, gender etc. but it fails to create a complete picture, thus resulting in a market that is not segmented to its full potential (Cooper, 1984). The combination of demographic and lifestyle segmentation is referred to as psychographic segmentation, a term that was popularised by Emanuel H. Demby.

In 1978 a method for psychographic segmentation was created by consumer futurist Arnold Mitchell and some of his colleagues of SRI International (Bhasin, n.d.). This method of psychographic segmentation was named VALS™ (values and lifestyles). The VALS™ framework is based on consumer responses on 35 attitudinal and four demographic questions, which were presented to American consumers (Schiffman, Kanuk, & Hansen, 2011). The framework consists of eight segments based on these responses. Each segment is characterised by its own unique consumer patterns.

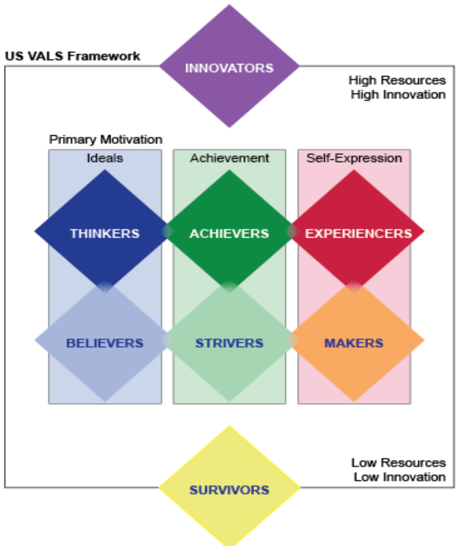


Figure 1: Eight segments of VALS™. Source: Strategic Business Insights, *US Framework and VALS™ Types*. Retrieved on 21 March, 2015 from strategicbusinessinsights.com

Figure 1 displays the eight segments of the VALS™ Framework. The following descriptions are given by Strategic Business Insights. The top of the framework is occupied by innovators, which are described as successful, take-charge people with high self-esteem. Of all groups they are most receptive to new technology and ideas. Additionally, image is important for innovators; as an expression of their taste and personality rather than a display of power. The second group, the thinkers, are known to be motivated by ideals. They are described as motivated, satisfied individuals who value knowledge and responsibility. Moreover, thinkers tend to be conservative and practical, looking for functionality and value in the products they buy.

The achievers have the desire to be recognised by others. They are goal-oriented and are known to have many needs and wants, making them active in the consumer market. They mostly prefer prestigious products to demonstrate their successes to others. Other characteristics of achievers include value of consensus and predictability. Experiencers care more for self-expression, and tend to spend a high portion of their income on fashion and trendy products. Experiencers tend to be younger, enthusiastic and impulsive buyers. Variety and excitement are also important factors for the experiencers.

Each of the three high-income segments has low-income counterparts. The believers follow the same path as the thinkers, getting their motivation through ideals. They tend to be predictable as consumers, often buying the familiar products or brands. Believers are seen as conservative people with concrete beliefs and traditions. Below the achievers are the strivers; fun loving individuals who are motivated through the opinions and approval of others. Strivers tend to copy the styles of people with a more favourable purse than their own. To them, shopping is a social activity as well as an opportunity to prove themselves to their peers.

Makers are the low-income variant of experiencers, being motivated by self-expression. They are practical people who value self-sufficiency. They have the tendency to be suspicious of big businesses. Materialistic possessions are of lesser importance to makers; they are more concerned with practical or functional purposes. At the very bottom of the framework are the survivors. They are the polar opposites of innovators, being comfortable with things that are familiar and cautious in terms of change. Survivors are more concerned with fulfilling needs rather than desires. They tend to be loyal to certain brands, especially when they are available with discounts (Strategic Business Insight, n.d., *US Framework and VALS™ types*).

One issue that may occur by using the VALS™ framework is that the eight segments may not necessarily represent Dutch consumers. Various VALS™ frameworks have been developed for other countries such as China, Japan and the UK, but the Dutch consumers have not been grouped into various categories yet. Overall, the various VALS™ frameworks have similar types of consumers, only with different names or slight differences in motivations. Since the Dutch consumers do not have a VALS™ of their own, the original US version is used in this research. It is possible that Dutch consumers do not entirely recognise themselves in one of the eight categories, but rather choose a category in which they think they belong most.

An alternative for VALS™ was considered for this research, namely the List of Values (LOV) method. This method was created at the University of Michigan Survey Research Centre (Kahle, Beatty, & Homer, 1986). The List of Values method presents consumers with nine primary values. The consumer should then choose the two values that are most important to them, or rank all nine values according to their importance. The nine values consist of self-respect, warm relations with others, and the sense of accomplishment, self-fulfilment, fun and enjoyment in life, excitement, sense of belonging, being well-respected, and security (Hoyer, MacInnis, & Pieters, 2012). The answers given by the consumers lead to assumptions about their respective lifestyles. The VALS™ framework was ultimately chosen as it provides standardised categories, whereas the List of Values requires the researcher to draw conclusions himself. The limited amount of time makes the VALS™ framework more favourable for this research, as consumers can be placed in pre-existing segments. This does mean, however, that the results should be assessed critically, as they may not accurately represent Dutch consumers.

2.3 Psychological aspects

2.3.1 Attitudes

Attitudes are considered to be one of the starting points of consumer behaviour (Blythe, 2013). Michael A. Hogg and Graham M. Vaughan (2005) defined attitudes as "…a relatively enduring organization of beliefs, feelings, and behavioural tendencies towards socially significant objects, groups, events or symbols." The attitude of a person towards a product greatly influences whether or not the consumer will consider buying it. A more detailed breakdown of the definition yields five key points. The first point is that attitudes are learned, as opposed to being instinctive. The second point is that attitude is not behaviour, but rather a predisposition towards certain behaviour. The third point is that attitude implies a relationship between a person and an object, which could also be a person or, in the case of this research, a company. The fourth point states that attitudes tend to be stable and are thus hard to change and the relationship between a person and an object is not neutral. The fifth point is that, expressing an attitude means that a person either likes something or does not (Blythe, 2013).

Attitudes are shaped by experience, but also by indirect means such as communication with friends or family. When a friend refers to a certain movie that you have not seen yet as 'boring,' you are likely to develop the same sort of attitude, increasing the chance you will not watch the film (Schiffman, Kanuk, & Hansen, 2011). Attitude is arguably the internal aspect that is most sensitive to external influences, which means it should be taken into account during this research (by analysing how many gamers bought a console due to friends or family influencing them, for example).

Most researchers agree that attitudes consist of affect, behaviour (or conation) and cognition (Solomon M. R., 2004). These three components are referred to as the ABC model of attitudes. The knowledge and beliefs of an individual towards an object can be found within the cognitive component. The affective component represents feelings about an object, and can thus be considered more of an emotional component. Lastly, the conative component refers to the actions or behavioural tendencies towards the object in question (Blackwell, Miniard, & Engel, 2005). All three components are linked to one another. Beliefs and feelings help form an attitude, which in turn leads to behavioural intention and the behaviour itself.

Aside from knowing whether a consumer has a positive or negative attitude towards a product, it is also important to understand the reasons for these attitudes. According to Blackwell, Miniard and

Engel (2005) most consumer researchers focus on the cognitive component when trying to explain the reasons behind certain attitudes, meaning that attitude is seen as depending on the beliefs of an individual. To gain a better understanding of attitudes, multi-attribute models have been developed. In these models, beliefs typically involve associations between the object in question and various features or attributes of the object (Blackwell, Miniard, & Engel, 2005).

Although there are several models developed for gaining a better understanding of attitudes, this research deliberately avoids using them. Instead, the focus of the research is aimed at determining how to influence the three components that comprise attitudes. The reason why attitude is approached differently than, for example, personality or lifestyle is that these aspects are internal personal factors, rather than psychological ones. The personal factors can be categorised, whereas attitudes can simply be called positive or negative. Therefore, the psychological factors are approached differently in this research.

There are several options when attempting to influence the ABCs of attitude. Some methods of influencing attitude have been noted by Lars Perner (2010). The first method is to change affect. A classic technique of achieving this is to combine a product with a positive stimulus (e.g. Axe deodorant attracts beautiful women). A second method is simply to attempt to make consumers enjoy a commercial and hope it results in the purchase of a product, for example through humour or likeable characters. Aside from trying to influence affect, a marketer can try to influence behavioural intentions. One way to achieve behavioural change is to decrease the price of a product so that people may think of it as a better alternative to what they usually buy.

The third method is trying to influence the beliefs of consumers. While this seems like a logical strategy it is often easier said than done, since some attitudes are resistant to change (Bagozzi & Lee, 1999). Attempts can be made to affect beliefs in four ways: changing current beliefs, which essentially means convincing consumers that their current beliefs are incorrect; changing the importance of beliefs, for example weakening or strengthening existing beliefs in the mind of the consumer; adding new beliefs, which can be done by adding ideas that seem plausible for the consumer; and changing an ideal, which is extremely difficult to achieve (Perner, 2010). This research attempts to unravel the strategies used by Sony and Microsoft to influence these particular factors of attitude. Five other strategies are mentioned by Schiffman, Kanuk and Hansen (2013):

1. changing the basic motivational function of the attitude;
2. associating the product with events, causes or groups;
3. resolving two conflicting attitudes;
4. influencing components of the multi-attribute model;
5. and changing consumer beliefs about the brand of a competitor.

Two of these strategies can be linked to the main research question of this report, namely changing the motivational function of the attitude and changing consumer beliefs about the brands of competitors. The latter is of particular importance as this report focuses on the rivalry between two companies selling products which, in essence, offer the same value.

Although it is often stated that attitudes are fairly stable and resistant to change, it is certainly not impossible to alter them. Attitudes towards brands and products play a significant role in choosing which product is bought, making them a vital factor for marketers. One of the goals of this report is to find out how Sony and Microsoft try to shape the ABCs of consumer attitudes. Furthermore, the research aims to identify which of the motivational functions are most important for both companies.

2.3.2 Motivation

Solomon (2004) describes motivation as the process that guides people to act the way they do. The process occurs whenever a need arises that a person wishes to satisfy. Motivation comes in both positive in negative forms. A positive example would be going to a restaurant when hungry, whereas a negative motivation might be avoiding a dark alley out of fear (Schiffman, Kanuk, & Hansen, 2011). A multitude of motivational theories are presented by Ray Wright (2006). One of these is the drive reduction theory, which was developed by Clark Hull in 1952. The core idea of this theory is that both humans and animals are driven by the needs of the body.

The drive theory is also referred to as a push theory, as internal needs push the organism into seeking satisfaction. According to Blackwell, Miniard and Engel (2005) there are drives that come from utilitarian needs, and drives that come from hedonic or experiential needs. The drive theory is best suited to this research, as both utilitarian and hedonic needs can be considered as the drive to buy a gaming console. Buying a gaming console is most likely always a hedonic need, as people try to gain pleasure and positive experiences from it, but the utilitarian needs (functional product attributes) will be most important to identify.

As Blythe (2013) writes, motives can be divided into six different categories: primary motives, which are the main reasons to buy a product (e.g. a new car because the current one is too old); secondary motives, which involve buying a specific brand; rational motives, which are motives based on the reasoning and logical assessment of a consumer; emotional motives, which involve the feeling a consumer associates with a certain brand; conscious motives, which are the motives we are aware of; and dormant motives, which are motives that lie beneath the conscious level. This research uses Blythe’s approach due to its depth in differentiating multiple types of motivation. The conscious motives and dormant motives are not discussed as thoroughly in the case study because conscious motives can be included in the other categories of motivation, and there is simply not enough time to unravel the dormant motives of the targeted audience.

In summation, motivation always emerges from a certain need. Marketers have a number of options to influence the needs of consumers. It is possible to create a new need, reinforce an existing need or make a consumer more conscious of a need (Perreau, 2013). The primary goal of this research is to find out which whether Dutch gamers are driven by hedonic or utilitarian needs, and what their primary, secondary, emotional and/or rational motives are to buy one of the next-generation consoles.

2.3.3 Knowledge

Before an individual considers buying a product, he or she must know what value the product can add to his or her life. In fact, the individual must be made aware that the product exists in the first place. Blackwell, Miniard and Engel (2005) propose that what consumers buy, how much they will pay, and where and when they will buy all depend on the knowledge that the consumer possesses. A more specific definition of the term knowledge is that "…it can be defined as the information stored within memory. The subset of total information relevant to consumer functioning in the marketplace is called consumer knowledge" (Blackwell, Miniard, & Engel, 2005).

Knowledge about the product is a significant factor in the decision-making process. According to Tyagi and Kumar (2004) product knowledge consists of three components: the characteristics of the product, the positive benefits of using the product and values the product helps consumers to satisfy. This theory is somewhat expanded by Blackwell, Miniard and Engel (2005), who define knowledge as a conglomerate of many different types of information. According to them, product knowledge consists of awareness of the product category and brands within this category, product terminology (e.g. "RPG" for video games), product attributes or features and beliefs about the product category in general and specific brands. This research employs the theory suggested by Blackwell et al. due to the fact that it covers more factors than the theory presented by Tyagi and Kumar. How Sony and Microsoft communicate the necessary knowledge is the primary question for this topic.

2.3.4 Perception

The final aspect within the buyer characteristics of the black box is consumer perception. In the words of Ray Wright (2006) perception is "…the process of selecting, organising and interpreting sensory data into usable mental representations in the world." Schiffman, Kanuk and Hansen (2011) and Blackwell (2005) give approximately the same definition, which reinforces the validity of this definition. The sensory data comes in the form of smells, tastes, sounds, sights and touch, which affect the nose, mouth, ears, eyes and skin respectively. The immediate response of the sensory organs to one of these stimuli is called a sensation (Schiffman H. R., 2001). According to Schiffman, Kanuk and Hansen (2011) consumers subconsciously select which stimuli they receive, as acceptance of every single stimulus each day would lead to perpetual confusion. Therefore people tend to be affected by only a limited amount of sensory stimuli.

This type of selective attention is one of three processes within the perception mechanism of an individual (Perreau, 2013). The other two processes can be referred to as selective distortion and selective retention. Selective distortion means that, in many situations, stimuli are not processed in the exact same way by two separate individuals. Companies can use this to their own advantage, especially if they know whether consumers have a positive attitude towards them. According to Perreau (2013), experiments have shown that consumers tend to like a product more once they hear it is their favourite brand, even though it does not differ from another product given to them. This shows the connection between attitude and perception. Selective retention refers to everything an individual will store in his or her memory after receiving a certain stimulus.

For marketers it is necessary to understand how the consumer perceives a brand or product. Perception is particularly important in the video game industry perception, as video games rely heavily on auditory, visual and even touch stimuli. It is necessary to study how these cues are implemented by Sony and Microsoft and, more importantly, which ones are amplified or placed in the forefront by the companies.

2.4 Conclusion

This chapter has presented the core definitions of the internal factors within the black box of consumers. It is now clear how these factors persuade consumers to engage in certain behaviour. It is interesting to note that many, if not all, of the psychological factors are somehow linked or intertwined. The motivation of a person to buy a certain product can, for example, be influenced by his lifestyle. The personality and lifestyle of an individual may provide explanations for certain attitudes he or she holds, or how the individual perceives stimuli presented to him or her. This interconnection between psychological factors may prove to be a challenging, yet interesting factor to research. The research relies on the various models chosen for each psychological aspect to discover how they apply to Dutch consumers, and/or how Sony and Microsoft are targeting (or not targeting) these factors within the minds of these consumers.

3. Theories of marketing strategy

3.1 Scope

Understanding consumer behaviour is vital for marketers. Many of the most successful companies today acquired their position due to their efforts in serving customers and staying close to them (Peter & Olson, 2009). According to Armstrong and Kotler (2011) the central question for every marketer is: “How do consumers respond to various marketing efforts the company might use?” The starting point of this process is the black box model, which has been addressed in the previous chapter. That chapter briefly mentioned the stimuli (input) that go into the black box, but focused on the psychological and personal factors of consumer behaviour. This chapter concentrates more deeply on the stimuli that go into the black box of the consumer and describes them in them more detail.

There are two categories of stimuli that influence the contents of a consumer’s mind: marketing stimuli and other (environmental) stimuli (Sandhusen R., 2000). The environmental or ‘other’ stimuli category consists of such factors as economic, technological, cultural and social stimuli, whereas the marketing stimuli consist of product, price, place and promotion (Armstrong & Kotler, 2011). This research is about the marketing strategies of the companies, and therefore focuses on the marketing stimuli affecting consumer behaviour. Although environmental stimuli will be mostly disregarded in this research, there will be a minor role for the external factors of ‘family and friends,’ as this factor may be considered the most important of the external factors.

Those who are already familiar with the core concepts of marketing may recognise the marketing stimuli as the ‘marketing mix,’ a concept that is also addressed in this research. The marketing mix is essentially a tool used by marketers to increase revenue (Kotler, 2003). This report follows the trajectory of the marketing stimuli and homes in on several strategies related to this concept, as well as some additional marketing strategies that are of importance. The strategies related to the marketing stimuli share the names of the factors within the stimuli box, thus the strategies focused on in this report are product strategy, pricing strategy and promotion strategy (Peter & Olson, 2009). Although it is not mentioned by Peter and Olsen, this research also takes a limited look at the placement strategy of Sony and Microsoft, as it is an aspect of the marketing stimuli.

Other strategies discussed in this report are marketing segmentation, targeting, and position. These strategies cannot be ignored, as they are inextricably linked to some of the internal factors noted in the previous chapter. Furthermore, the research examines how the strategies followed by these companies fit into various categories of consumer behaviour strategies. Peter and Olsen (2009) list four categories of consumer behaviour strategies. These categories are defined as affective, cognitive, behavioural, and combined strategies. The end goal is to determine which internal aspects are targeted and in which of the four categories they belong.

3.2 Market segmentation

The consumer market consists of many different types of consumers with various needs and wants. To achieve the most profitable results it is necessary for marketers to find the group(s) of people that offer(s) the most. This can be done through marketing segmentation (Armstrong & Kotler, 2011). Kotler (2003) writes that market segments consist of consumers who tend to act or respond in a similar fashion to a specific set of marketing efforts. The process of market segmentation consists of two parts: developing segments followed by prioritising and selecting the segments (McDonald, 2012). Effective marketing segments should be identifiable, sufficient in terms of size, stable or growing, reachable in terms of cost, and congruent with the objectives and resources of the firm defining the segments (Schiffman, Kanuk, & Hansen, 2011).

3.3 Market targeting

Once a company has defined the most profitable segments, it must choose which of these segments it will enter. Armstrong and Kotler (2011) describe this process as market targeting which "…involves evaluating each market segment's attractiveness and selecting one or more segments to enter." According to Kotler (2003) it is practically mandatory for companies to find specific target markets instead of relying on mass marketing, as it is near-impossible to create a product that will meet the needs and wants of every single consumer. The case study in one of the later chapters analyses possible segments in the Dutch gaming scene that are most likely targeted by Sony and Microsoft.

3.4 Positioning

The second step after segmenting the market is choosing how to position the product of the company. A strong definition is given by Armstrong and Kotler (2011), who state that positioning is using a product to occupy a distinctive and desirable place relative to competing products in the minds of consumers, thus creating competitive advantage. Effective positioning starts by differentiating a product from those of its rivals (Armstrong & Kotler, 2011). The case study analyses the positions occupied by Sony and Microsoft, and explains how they have differentiated themselves from one another.

3.5 Marketing mix

As mentioned before, the marketing stimuli within the black box model can also be defined as the marketing mix of a company. The marketing mix is a collection of controllable marketing tools that a company uses to create the response it wants from the targeted market(s) (Armstrong & Kotler, 2011). The marketing mix includes the product, price, promotion and place of a product, which are normally referred to as the 4 Ps of the marketing mix. According to Kotler (2003) there has been a lot of discussion whether more Ps should be added to the mix, such as packaging, physical evidence or personalization. Since this research uses the black box model, it will be confined to the original 4 Ps in that particular model. Not including some of the newer Ps may result in less detailed data, and this must be kept in mind when looking at the outcome of this research.

The first P, which stands for product, revolves around the goods-and-services combination the company is offering to the targeted market (Armstrong & Kotler, 2011). It can include a variety of aspects, such as quality, design, brand name, packaging and so forth. Price is what the consumers must pay to gain access to the product or service. Additionally, it includes discounts, payment periods and credit terms. Promotion revolves around how a company publicizes the product. This can be done through advertising, sales promotion or public relations. Place defines where a product is sold and through what channels it can be bought, and encompasses logistics and inventory (Kotler, 2003).

3.6 Product strategy

Peter and Olson (2009) identify three aspects of product strategy: product affect and cognition, which deal with product (dis)satisfaction; product behaviour, which involves brand loyalty and product contact; and product attitude, which includes packaging and the product environment. We may presume that (dis)satisfaction plays a vital role in the strategies of Sony and Microsoft, as they may have learned from the experience of consumers with the previous generations of consoles, but it is also possible that (dis)satisfaction already occurred without the consumers even using the consoles.

The brand loyalty of players may also have affected the new console strategies, for example by rewarding those who owned the previous generation of consoles. The product attributes are of great importance as well, as consumers evaluate these attributes through their own beliefs, past experiences, or values (Peter & Olson, 2009). In short, the product strategy involves a variety of aspects that are all related to the product in some sort of way, whether it is the design (product attributes) or changes made based on past consumer experiences (affect and cognition). According to Peter and Olson (2009), the ultimate goal of product strategy is to influence consumers in both the short and long term.

3.7 Promotion strategy

The promotion of a product is of great importance, as it communicates the value of that product to consumers. Peter and Olson (2009) state that there are four means of promoting a product or service. These are advertising, which refers to any kind of paid non-personal presentation of a product; sales promotions, which are defined as direct incentives for consumers to make a purchase (e.g. coupons); personal selling, which involves direct and personal interaction between a salesperson and potential customer; and publicity, which consists of unpaid forms of communication, such as reviews in trade publications (Peter & Olson, 2009).

Identifying the promotional strategies of both Sony and Microsoft is necessary in order to unravel how their respective products are presented to their target audiences. The manner of promotion used to communicate their consoles to consumers greatly influences how the consumers perceive the consoles. Moreover, the promotion of a product could alter the entire mind-set of a consumer regarding that specific product, as the product may turn out differently than the consumer initially expected. This research mainly relies on advertising and sales promotions, as publicity does not come from the companies themselves, and personal selling depends on the employees of various stores and outlets.

3.8 Price strategy

The price of a product undeniably affects the decision of a consumer to buy the product or not. As with product strategy, price strategy can be divided into three categories: price affect and cognition, price environment and price behaviour (Peter & Olson, 2009). Price affect and cognition are rather straightforward, referring to the way in which consumers react to a certain price on a rational and emotional level. Price affect and cognition are the main focus for price strategy in this report. This is due to the fact that it relates to affect and cognition, which in turn relate to the main content of chapter two.

Peter and Olson (2009) argue that there are three general situations for creating price strategies. The first situation is the price setting for a new product (initial price), the second situation is a long-term price change and the final situation refers to a short-term price change. This research looks at how the prices of the consoles have changed since their initial release (if they have changed at all), and how this has affected consumer behaviour. The exact type of pricing strategy is defined in the case study when looking at the companies in question.

3.9 Place (distribution) strategy

The final aspect of the marketing mix strategies revolves around the place, or distribution, of a product. The distribution strategy of a company involves choosing the distribution channels through which a product is directed to the customer, and at what locations it is sold (Armstrong & Kotler, 2011). This research focuses on the Netherlands, and both consoles are sold in the same kinds of stores and outlets, making the location of both consoles clear. The distribution, however, may influence the effect that both consoles have had on the public. An example of this could be availability of the consoles, which naturally determines whether the consumer can buy the product.

3.10 Conclusion

The main goal of this chapter has been to introduce the various types of strategy that are of importance in influencing the minds of consumers. The chapter has demonstrated that there is a direct connection between the marketing mix theory and the black box theory, as the contents of the marketing mix are used within the model as the marketing stimuli. Segmentation, targeting and positioning strategies are undeniably connected to personal factors (personality and lifestyle), therefore they must be taken into consideration. Each individual aspect of the marketing mix and its applicable strategies are capable of affecting the internal aspects within the mind of the consumer, creating the challenge of making the correct connections. This challenge forms the foundation of this research.

4. Methodology

4.1 The framework

This chapter discusses the methods used to reach the conclusion of this research. All of these methods are based on a framework that is constructed from the key terms and theories of the report. Essentially, the framework functions as the foundation of the research project and provides a visual representation of how the research was conducted. In addition, this chapter explains the field research and desk research methods that were used to obtain additional information for completion of the report.

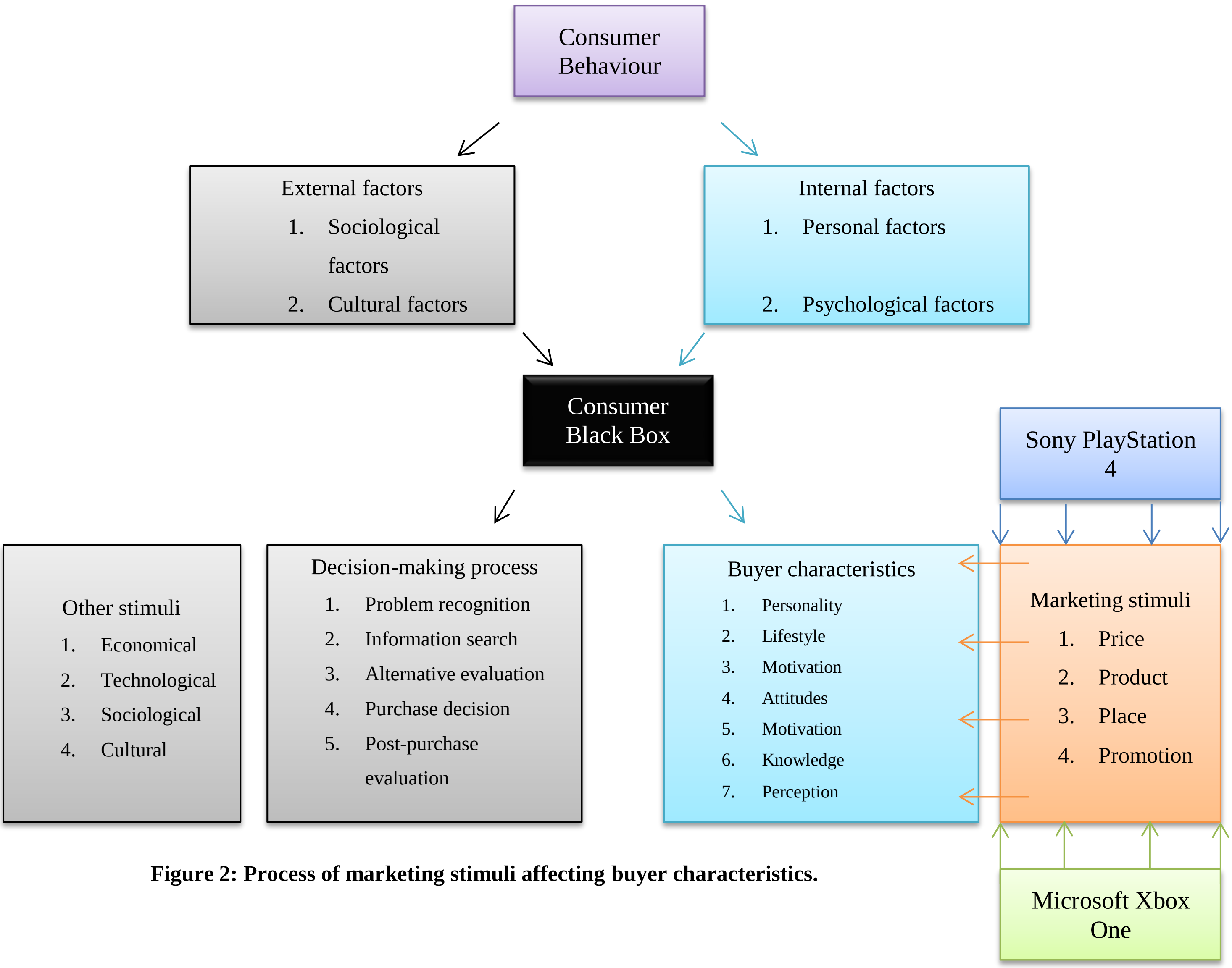


Figure 2: Process of marketing stimuli affecting buyer characteristics.

The framework used for this research follows the trajectory of the internal aspects of consumer behaviour. For this reason, the external factors (and other aspects that are of less importance) appear in grey boxes in Figure 2. As mentioned in chapter two, the internal factors consist of the psychological and personal aspects, which are represented in the consumer black box as buyer characteristics. The marketing stimuli, which were detailed in chapter three, are placed next to the buyer characteristics, since the goal of the report is to find out how these particular aspects of the mind of the consumer are affected by such stimuli.

Though the external factors and decision-making process are not discussed thoroughly, they are still important factors in consumer behaviour. This means that the research should be interpreted with caution, as some data may be left incomplete by omitting the influences of family, culture or reference groups, for example. As the Netherlands are recovering from the economic crisis (Trading Economics, 2015) economic stimuli could be playing a role in the buying behaviour of consumers, resulting in more positive purchasing behaviour.

The decision-making process may be used to identify which internal factors are most active during certain stages of the process. This is only a minor addition though, and the focus remains on the marketing stimuli affecting the buyer characteristics. Although it can be considered a minor addition, leaving out the decision-making process may further call the validity of the research into question. Taking the limited scope of the research into account, the results of this report must be approached critically, and should be considered as part of a greater process.

4.2 Desk research

4.2.1 Literature review

Desk research can be defined as the assembly and analyses of pre-existing or pre-published information Armstrong M, 2006). The first form of desk research used in this report comes from the literature referenced in chapters one and two. The first two chapters of this report focus solely on theories of marketing and consumer behaviour, making desk research the most fitting, if not the only possible method of gathering information. The literature gathered comes largely from books, scientific papers, professional websites, or previously conducted case studies, as these sources tend to be more reliable than articles written by private individuals.

4.2.2 Additional pre-existing information

Desk research through literature is also used in the case study of this report. The case study revolves around the strategies utilised by Sony and Microsoft. There are various sources which report on the actions taken by both companies, such as gaming review websites, journalistic websites and technology websites. Additionally, there is a multitude of gaming magazines that report on new trends and tendencies within the industry. Moreover, Sony and Microsoft publish annual reports which often give more detailed insights into the plans and actions of the companies. Naturally, neither of the two companies publishes their exact strategies, so the use of desk research is necessary to determine the most plausible strategies the companies are implementing.

4.3 Field research

The following paragraphs explain which methods of field research have been used to support this thesis. The chapter discusses several possible interview methods, which type of interview was chosen for this research, and who was approached for interviews. Additionally, this chapter gives an overview of survey questions, and theories that help validate a survey.

4.3.1 Interviews

Multiple types of field research are vital for this study. Two types of field research were used, namely quantitative and qualitative field research. In the words of Saunders et al. (2011), qualitative research is primarily used as "…a synonym for each method to gather data (interview) or as a procedure to analyse data that does not generate numerical data." The quantitative methods are aimed at the consumer behaviour theory of the first chapter, as this theory best applies to Dutch gamers. To acquire credible and representative information, a vast quantity of information must be collected from this group. Qualitative methods are used to gain more information about the marketing theories discussed in chapter two, as more in-depth information on both companies must be gathered.

As mentioned in paragraph 4.2.2, neither Microsoft nor Sony publishes the exact details of their strategies, making it difficult to determine which ones they are actually using. It is possible, however, to gain more information from experts within the gaming industry. Therefore this research relies on interviews as the main source of qualitative field research. Interviews can be defined as goal-oriented conversations between two or more individuals (Kahn & Cannell, 1957). Baarda (2014) describes three types of interviews: structured interviews, semi-structured interviews and unstructured interviews. As the name suggests, structured interviews feature questions that are based on standardised or identical questions, resembling more of a questionnaire rather than an interview. Semi-structured interviews feature a list of specific themes to be discussed, but the questions can vary from interview to interview (Saunders, Lewis, Thornhill, Booij, & Verckens, 2011).

Unstructured interviews, also known as depth-interviews (Baarda, 2014), tend to be informal and do not require pre-determined questions. It is, however, necessary to know which topics are to be discussed. This research uses the semi-structured interview method, as structured interviews may limit the amount of information gained from the respondents. The interviews consist of a list of themes, each of which includes several questions. It is possible, however, for questions to be changed or left out, or for new questions to arise during the interview. As stated earlier, most, if not all, questions in the interview are based on the theory discussed in chapter two.

To ensure that the information from the interviews is relevant for this research, two experts with broad knowledge of the gaming industry were approached. The first interviewee, Peter Warman, is the CEO of Newzoo, a company that analyses the games industry and its markets on a global scale. The second interviewee, Bart Hufen, is the cofounder of Brand New Game, a company that helps other organisations to operationalise their activities by means of interactive games. Both men have an extensive history in the games industry and are highly knowledgeable.

Both of the interviews were conducted personally to ensure that all the answers were understood correctly and to allow further questioning when necessary. Full transcripts of both interviews were made for the purpose of analysis. The most important information is used to support the theories presented in the case study.

4.3.2 Interview questions

The first step in creating good interview questions is to find (empirical) indicators which refer to the theory of the literature study (Leming, 1997), meaning that, for the purposes of this research, all questions must have some relation to the theories discussed in the second chapter. The table below gives an overview of the questions asked during the interviews, and to which theme of chapter two they belong. The questions provided below are merely the standard set of questions asked to both respondents, meaning that the actual questions asked during the interviews may differ from the ones presented here.

Theme	Question(s)
Segmentation, targeting, position	1. According to you, which segments of the game market are targeted by Sony and Microsoft? 2. On what basis do you think the companies segment? (e.g. psychographic, geographical etc.) 3. How are Sony and Microsoft positioning their respective consoles?
Product strategy	1. How do the new consoles differ from their older counterparts? 2. What mistakes from the previous consoles have been remedied/repeated?

	3. In your opinion, what are the most important new attributes of the consoles? 4. With previous consoles, newer versions such as the PlayStation 3 slim and Xbox 360 slim were released. Do you think Sony and Microsoft will repeat this strategy?
Promotion strategy	1. Promotion can target the rational thinking of a consumer or his/her emotions. Which types have been used by Sony and Microsoft? 2. Looking at the Netherlands, are Sony and Microsoft altering their promotional strategies based on the region, or do they not differentiate their strategies? 3. There has been some controversy surrounding the announcement of the Xbox One. In your opinion, how has the initial reveal affected consumer attitudes/opinions?
Price strategy	1. During the initial release, the PlayStation started out cheaper than the Xbox. How important do you think the pricing was for the decision of consumers? 2. The price of Xbox One has been lowered by now, undercutting the PlayStation. Why do you think Sony is not reacting by lowering their price as well?
Place (distribution) strategy	1. The Xbox One only became available for purchase a year after the PlayStation 4 in the Netherlands. How

	big of an impact did this have on sales? 2. Even though the PlayStation released earlier than the Xbox, the PlayStation was sold out nearly everywhere in a short time. In your opinion, was this a strategy from Sony to increase demand, or simply a mistake from the company?
Future strategy	1. Sony is currently developing Project Morpheus, the virtual reality glasses, while Microsoft is not. How important will virtual reality become for gaming? 2. What innovations do you expect from both companies?

4.3.3 Survey

For quantitative research, this report uses a survey as the primary research tool. As the research revolves around the consumer behaviour of Dutch gamers, it is important to know the opinions of this target group. By using a survey, it is possible to reach out to a significant portion of the target group, which increases the validity of the data gathered. To determine the number of respondents needed, this research follows the guidelines of the Dutch company Alles Over Marktonderzoek (AOM), which provides a formula for this purpose. The AOM guidelines determine the required amount of respondents through several factors. The size of the population (in this case the target group, Dutch gamers) and the margin of error play vital roles for developing relevant and valid survey results.

According to a 2009 market analysis conducted by Newzoo, there are approximately 9.3 million gamers active in the Dutch market (Buigues, 2009). Since this research was conducted several years ago, it is to be expected that the number of gamers has grown. To make a rough estimate, this research uses a target group of 11 million gamers. Bart Hufen (2010) states that approximately 51 percent of the gamers played video games on a console in the year 2009. This results in an estimated population rate of 0.51 × 11 million = 5.61 million Dutch console gamers. Following the AOM guidelines, a population rate of 5.61 million gamers requires 271 responses for a validity of 90 percent, 384 responses for 95 percent, and 663 responses for a validity of 99 percent. Taking the amount of time available for the research into account, a 10 percent margin of error margin was used, thus resulting in a validity rating of 90 percent. This means that at least 271 respondents were needed to complete the survey to make the research plausible with this degree of confidence.

To reach the target audience, this survey was distributed mostly on online communities and social media. Gamers tend to be quite active on forums where they can share their opinions on recent topics in the gaming industry. The survey was posted on various popular websites, such as Power Unlimited, Gamer, Insidegamer, Gamersnet and IGN Benelux. To aid the research, IGN Benelux agreed to post a Tweet on their Twitter page containing the link to the survey. Aside from Dutch gaming websites, social media platforms such as Facebook were used to increase the reach of the survey. A link to the survey is posted on the Facebook pages of Sony Nederland, Xbox Nederland and Game Mania. The final number of respondents that completed the survey was 284, all of whom are in possession of one of the new consoles.

As mentioned before, the survey was used to gain more information about the themes discussed in the first chapter. This means that most, if not all, of the questions in the survey are related to the personal or psychological factors of the respondents. The table below presents an overview of the questions contained in the survey, as well as the concepts and indicators that were used to form them.

Concept	Indicators	Questions
Personality	Openness	The following traits are based on extreme characteristics. Select the ones that fit you the most (they do not have to describe you perfectly). Which of these traits describe you best? - Creative, artistic, complex or - Simple, not so creative, not so artistic
	Conscientiousness	- Chaotic, reckless, inconsistent or - Organised, practical, careful
	Extraversion	- Shy, silent, introvert or - Assertive, energetic, talkative
	Agreeableness	- Suspicious, demanding, stubborn or - Helpful, friendly, trustworthy
	Neuroticism	- Emotional, anxious, short temper or - Stable, relaxed, easy-going
Lifestyle	Innovator	Which of these traits describe you the best? I am successful and have a lot of confidence. I love new technology and innovations, and I have the resources to

		buy them. I love luxury or niche products that reflect my personality.
	Thinker	I am mature and think that order, responsibility and knowledge are important. I watch news to broaden my knowledge. I have the resources to buy luxury goods, but I prefer practical things that are functional and can be used for a long period of time.
	Achiever	My motivation comes from the urge to succeed. I live according to life goals and think family, friends and work are important. My image is also important, so I like to buy things that show my success.
	Experiencer	I am motivated by self-expression. I am young, impulsive, and get excited when I discover something new. I spend a lot of money on fashion, entertainment and social activities. I follow the newest trends and buy things that are considered ‘cool’.
	Believer	I am conservative and like traditional norms and values. I follow the same routines in terms of family, friends and work. I tend to buy products that are well-known, or products that I am familiar with.
	Striver	I am trendy and like to have fun. I worry about what other people think of me. I do not have enough money to buy the most expensive products, so I buy things that look like the products bought by the people I look up to. I like to show people that I can also buy the things I want, which makes me somewhat impulsive.
	Maker	I think self-fulfilment is important in life. I live conservative, and I have little interest in new things outside my comfort zone. Materialistic possessions are not important to me. I like to buy simple and cheap products, because value is more important than luxury.
	Survivor	I do not have many resources to my disposal, which is why I live a focused and simple life. I love the things that I am familiar with; they make me feel more comfortable and safe. I only buy things when I really need them, and I love well-known brands as long as they are sold with discounts.

Concept	Indicators	Questions
Knowledge	Product knowledge	Are you involved with the game industry on a daily basis, and are

		you familiar with the brands active in the industry? - yes - no Which of the new consoles are in your possession? - PlayStation 4 - Xbox One - Both Where did you hear about the console for the first time? - Promotions of the Sony/Micro - External websites - Friends and family - Other, namely…
	Product characteristics	What was the first thing you heard about the console? - The price - Hardware specifications - Product features (e.g. applications) - Software (available games) - Other, namely…
Motivation	Primary motivation	What was your primary motivation to buy a new console? Multiple answers possible. - I like to have the newest things - My old console had to be replaced - Gaming is new for me, I wanted to try it out - All my friends bought one - Other, namely…
	Secondary motivation	What were the primary reasons to choose for the PlayStation 4/Xbox One? Multiple answers possible. - I like this console better than the other - I like this brand better than the other - I like the games on this console better than the other - The price of the console - Other, namely…
Attitude	General question	On a scale of 1 to 7 (1 very positive, 7 very negative), what is your opinion about Sony/Microsoft/Both? 1-------7
	Attitude cognition and affect	Which of the following factors have influenced your attitude towards Sony/Microsoft/Both? Multiple answers possible. - Experience with other products of the brand - Promotional tools - Company policy

		- Stories other people told me - Other, namely… What has influenced your opinion about the new console of Sony/Microsoft/Both? Multiple answers possible. - The features of the console - The looks of the console - The price of the console - The promotion of the console - The games available - Stories other people told me - Other, namely…
Perception	Sensory stimuli	On a scale of 1 to 7 (1 very important, 7 not important), how important are the following aspects to you? Visuals (graphics) in commercials and games 1----------7 Audio (sound) in commercials and games 1----------7 The feeling of a controller in your hand and the materials of the console 1----------7
Brand Loyalty	Loyalty strength	Did you own other consoles before this one? Multiple answers possible. - Yes, a PlayStation2 - Yes, an Xbox - Yes, a Nintendo Wii - Yes, an Xbox 360 - Yes, a PlayStation 3 - Yes, a Nintendo Wii U - No, none of these consoles
General information		What is your age? - Younger than 15 - 15-20 - 20-25 - 25-30 - 30-35 - 35+ How many hours per week do you generally spend on games? - 0-1 - 2-3 - 3-4 - 5+

Note: the published version of the survey is in Dutch.

Although the personal factors of the respondents are difficult to measure, the survey nevertheless attempts to gain at least some insight into what type of consumer the respondent is. The questions revolving around personality are based around the five-factor model, which was described in chapter two. Some of the more neutral aspects of the five-factor model are incorporated into the survey to ensure that the answers would not be too one-sided. With these personality traits it is possible to define what types of people are generally reached by Sony and Microsoft.

The same method has been used to determine lifestyle, employing aspects from the eight various VALS™ segments. Since the Dutch consumer is different from the American consumer, the question indicates that the respondents should choose what best describes them, stressing that it does not have to be a perfect description of the person in question. The short descriptions given in the survey are directly based on the information provided by Strategic Business Insights, thus creating a relatively solid representation of the various VALS™ segments. By using this method it is possible to gain some understanding about which type of people, in terms of personality and lifestyle, tend to buy game consoles.

The questions concerning knowledge were included to determine whether the respondent has adequate knowledge of alternatives in the industry, and how he or she acquired knowledge about the new consoles. By asking where the respondent obtained his or her knowledge, it is possible to find out whether the promotion strategies of Sony and Microsoft are having an effect, or are rather insignificant in comparison to external websites or even friends and family. The third question is an extension of the second one, asking what type of information the respondent perceived first. This information can be used to pinpoint aspects of the console that are deemed most important by Sony and Microsoft.

The questions surrounding motivation mainly focus on the primary and secondary motivation, as described in the previous chapters. The primary motivation is important in that it shows where the drive to buy a new console originates. The secondary motivation determines why a person opts for Sony or Microsoft. Looking at the answers given to the question of secondary motivation, it may be possible to reveal some rational or emotional motivations as well. When respondent states that he or she likes the brand more, this is most likely for emotional reasons, while a choice based on the price of the console is more of a rational choice. Drawing conclusions from the primary and secondary motivation obviates the need to ask additional questions, thus making the survey shorter and easier for respondents to complete. One should keep in mind, however, that these conclusions are still based on assumptions formed from the results of the survey. Critical thinking is required when interpreting these results.

The general question regarding attitude is used to determine the basic opinion of the respondent towards the companies. The subsequent questions use the ABC model of attitudes, most prominently affect and cognition. These questions can help explain which factors have influenced respondents' opinions about the company to determine whether particular strategies of Sony and Microsoft were received positively or negatively, especially when looking at company policy. The final question concerning attitude tries to uncover which factors of the traditional marketing mix were most important for shaping the attitude of the respondent. Of course it might also be the case that the marketing stimuli were considered unimportant by many, which would give the research an interesting twist.

The last psychological factor, perception, was included to find out what is most important to gamers in terms of gaming experience. The survey focuses on sight and sound, as well as touch. Scent and taste have been omitted, as these are of no importance for this research. Determining whether gamers attach significant value to touch, visuals or audio may be important for the companies' product strategies. The final two questions are personal in nature to gain additional information about the respondent. These questions, especially the one about age, can be used to substantiate the success (or failure) of the segmentation and targeting strategies of the companies.

5. Case: Sony vs. Microsoft

5.1 Introduction

With the theory fully explained, let us now put it into practice. This chapter revolves around the strategies utilised by Sony and Microsoft to turn their consoles into commercial successes. The strategies described in this case study are based on the stimuli of the marketing mix: the price, promotion, placement (distribution) and of course the products themselves. The strategies discussed are those used in the Netherlands, meaning that localised strategies for other countries are not taken into consideration. Additionally, this chapter provides a brief overview of both Sony and Microsoft in terms of gaming, which includes the history of the companies and their previous products. It is important to note that this chapter does **not** analyse the effects of the strategies on the gamers, but rather describes only the strategies. The analysis of the effects of the strategies comes in a later chapter.

5.2 Sony Corporation

5.2.1 Company overview

According to the official website, Sony is a Japanese tech and entertainment company founded on the seventh of May in 1946. The name was derived from combing the word “Sonus,” which translates to ‘sound’ in Latin, with “Sonny,” indicating small size or a young man. The reason for this choice was the ease of pronunciation, which was largely the same in every language worldwide. As a tech company, Sony has produced notable products such as televisions, cameras and digital imaging, audio and video systems, electronic components, broadcasting equipment and medical equipment. Sony states that the official mission of the company is to “… be a company that inspires and fulfils your curiosity. Our unlimited passion for technology, content and services, and relentless pursuit of innovation, drives us to deliver ground-breaking new excitement and entertainment in ways that only Sony can, by creating unique new cultures and experiences. Everything we do is to move you emotionally,” (Sony, 2015). The current company slogan is “being moved.”

Sony Corporation functions as the parent company of the Sony Group, which consists of various divisions of the company. The division that is featured in this research is the Sony Computer Entertainment division. This division is responsible for the company’s gaming products and services, and recently celebrated its 20th birthday (having been founded in 1993). This division was the result of a joint venture between Sony Corporation and Sony Music Entertainment (Sony Computer Entertainment, 2015). Seeing potential in the gaming industry, Sony Computer Entertainment entered the Japanese market in 1994 and the European Market one year later.

After the success of the first PlayStation, Sony released a new console in both Japan and other regions in 2000. This console was simply named the PlayStation 2, and is still the best-selling console to date with over 150 million units sold globally as of 2010 (Ewalt, 2011). Sony gained a solid position in the gaming industry, and tried to continue their success with another console in 2005 (2007 in Europe), the PlayStation 3. However, Sony failed to replicate the success of the PlayStation 2 for various reasons. The first reason was the false promises made when the console was announced: many of the promised features did not materialise in the actual product (Groen, 2013). A second factor that made the PlayStation 3 less successful was the fact that Sony's console gained a new strong competitor in Microsoft.

After the somewhat disappointing PlayStation 3, Sony went through troubled times, sustaining losses in various divisions of the company, with the worst being suffered in the television, camera, and computer and telephone divisions of the company. Negative forecasts led to a loss of market value of nearly $2.2 billion. (Yasu & Huang, 2013). Although Sony continued their operations, the company was forced to perform heavy restructuring, resulting in the loss of approximately 5000 jobs in 2014, as well as another negative prognosis in terms of profit (Byford, 2014). Recently, Sony Corporation decided to retreat from the smartphone and television markets, as the competition in these sectors makes it nearly impossible for the company to become profitable (Ando, 2015).

Although Sony went through many hardships, the new flagship console of the company has shown tremendous potential, and is currently leading the gaming division of the company towards profits. Between the months of July and September 2014, close to 3.5 million PlayStation 4 units had been shipped, resulting in a massive increase of 84% in the Sony game division (Phillips, 2014). The PlayStation 4 has evolved into a vital asset of Sony in a surprisingly short amount of time, causing Sony to shift their focus to gaming and entertainment. Sony CEO, Kazuo Hirai, stated that "The strategy starting from the next business year will be about generating profit and investing for growth," (Nguyen, 2015).

A recent message from Sony revealed that the PlayStation 4 had reached a sales milestone of 20.2 million consoles, making it the first Sony console to reach this amount in such a short time (Moscaritolo, 2015). Currently, the PlayStation 4 is the leading console in terms of sales, leaving its competitors far behind. The new successes of the Sony gaming division, combined with the losses suffered in the other active divisions, makes for an interesting turn of events.

5.2.2 PlayStation 4 segmentation

The new PlayStation 4 console seems to attempt to reach out to enthusiastic gamers (core gamers). An issue addressed by both Bart Hufen and Peter Warman is that it is nearly impossible nowadays to segment gamers solely by demographic factors such as age. According to Hufen (2015) it is not unusual for people to start playing games as early as the age of three, making it difficult place 'gamers' into age categories. Hufen is of the general opinion that Sony chooses to target the broader audience of gamers, which ranges from 15 to 40 years old, giving them a better position in the market. Hufen also notes that Sony has always tried to present itself as a lifestyle product, thus segmenting on a psychographic, rather than demographic, basis.

Another important factor of segmentation, according to Hufen, is the role that games play in the lives of people. Instead of focusing on demographics and gender, companies should attempt to segment on play mechanics and lifestyle choices. Overall, Sony appears to target gamers between the ages 15 and 40 (estimated) who prefer to play on television screens, and see gaming as an important part of their life.

5.2.3 PlayStation 4 product strategy

According to Peter and Olsen (2009), product strategy revolves around three dimensions: product attitude, product affect and cognition, product behaviour and product attributes. With regard to product affect and cognition, Sony has improved several features in the PlayStation 4 that were seen as bottlenecks in the PlayStation 3. The PlayStation 3 was often criticised for its unstable online servers, which made online gaming less accessible. On the PlayStation 4, Sony improved the stability of the servers, which implies that the company is trying to provide customers with more satisfaction from gaming online.

According to Bart Hufen (2015), a major improvement of the PlayStation 4 was the amount of so-called 'sharability' it allows. The new console allows consumers to link their console to several social media platforms, such as YouTube, Facebook and the livestream service Twitch. Adding the option to create videos and photos has also been an important new feature of the PlayStation 4. As concerns product affect and cognition, and thus customer (dis)satisfaction, the PlayStation 4 has tried to improve upon every feature of its predecessor, to ensure consumers get the most positive experience out of the console.

In terms of product attitude, which involves product environment and packaging, the PlayStation is sold in cardboard boxes that are brightly coloured and feature images of several PlayStation games, or one specific game if it is sold as bundle with the console. With respect to product environment, the consoles are available at various retail stores as well as many online retailers, making it easy for consumers to buy. Product behaviour, which comprises brand loyalty and product contact, is cleverly used by retailers. Several stores allow customers to play on the consoles in order to persuade them to buy one. Brand loyalty, however, is a difficult topic in the world of gaming.

As Bart Hufen (2015) argues, some experts in the area of consumer behaviour have claimed that consumer behaviour does not in fact exist; the brand that shouts the loudest will acquire most of the buyers. Additionally, Peter Warman (2015) confirms that neither the PlayStation nor the Xbox provides anything to those that are loyal to the brand, such as extra features and extra content. It seems that Sony simply relies on its other strategies to create ‘loyalty’ for its console.

The product attributes of the PlayStation 4 have taken quite a step forward from its predecessor. The new PlayStation has taken a different route than its older brother in terms of looks, sporting a more sleek and streamlined design. The PlayStation 4 is of course more powerful than its predecessor in terms of hardware, allowing the system to produce better graphics, create more fluid images and increase overall performance. As most of the previous Sony consoles, the original PlayStation 4 was released in black. A limited edition of the PlayStation was released to celebrate the 20th anniversary of the original PlayStation. This edition was grey and white rather than black, thus mimicking the colours of the original PlayStation (Maiberg, 2014). Today, the PlayStation 4 is also available in pure white.

The controllers of the PlayStation family have remained largely the same throughout the years. The controllers of the PlayStation 4, however, were given a more substantial visual overhaul. The most significant change in the new controller is the removal of the ‘start’ and ‘select’ buttons, which have been replaced by a touchpad in the middle of the controller. Additionally, the shoulder buttons of the PlayStation 4 controller have been redesigned to fit the shape of the players’ fingers better. An interesting new feature is the ‘share’ button, which can be used to take screenshots or make short videos while playing a game. The front of the controller now features a light bar, which constitutes both a cosmetic change and a functional change, as this light bar can track the motion of the controller. Other changes in the design are the two analogue sticks of the new controller, which have been placed slightly higher in comparison to its predecessor, and indentations placed on top of the sticks to give better support to the thumbs.

Image 1: Comparison between the Sony PlayStation 4 controller and PlayStation 3 controller. Source: Brass Monkey Blog, retrieved on 8 May 2015 from http://blog.playbrassmonkey.com/page/2/.

The new PlayStation also supports various applications that were previously not available on Sony consoles. Aside from playing Blu-ray films, the new console allows interaction with social media applications such as YouTube and Facebook, as well as various apps for music and video, such as Netflix or Spotify. This changes the PlayStation from solely a gaming console into a multifunctional media hub. Furthermore, the PlayStation 4 is bundled with a mono-headset with a built-in microphone, so gamers can hear and speak with others during their gameplay sessions as well. Another important aspect of PlayStation is PS Plus. This service allows players to game online and download various games, themes, or additional content for games from the online PlayStation store with discounts. Additionally, PS Plus members can download certain games for free at the beginning of each month. This service is not bundled with the PlayStation 4, but can be bought separately in most, if not all, retail stores that sell gaming products.

5.2.4 PlayStation 4 price strategy

Looking back at the literature study, it can be seen that price strategy follows the same path as product strategy, being comprised of price affect and cognition, price environment, and price behaviour. When looking at the price of the PlayStation 4, it is clear that Sony learned from the mistakes it made with the PlayStation 3. The initial launch price of the PlayStation 4 was set to €399. This is a drastic change from the initial price of the PlayStation 3, which cost €599 when it was released (Wichers, 2007). This lower price may have had positive effects on both the affect and the cognition of consumers. The lower price may give the consumers the idea that Sony listened to them, and wants their products to be more accessible (affect). On the other hand, the console simply costs consumers less money which allows them to spend the rest on something else (cognition).

The interviewees contradicted one another with their statements about price strategies. According to Peter Warman the price of the console matters little, as gamers who want it will buy it anyway.

Bart Hufen, however, stated that a lower price could make the difference between selling your product to 1000 households and selling your product to 10,000 households. Whether the price is truly of importance becomes clear in the analysis chapter.

The literature mentions three general situations for determining the price of a product: the setting of an initial price, the setting of a long-term price, and the setting of a short-term price. Sony has not yet altered the initial price of the PlayStation 4, keeping the product available at a recommended retail price of €399. We can assume, though it is only an assumption, that the long-term price strategy of the PlayStation 4 will include one or two price drops. The first drop should occur after a newer version of the console is released (releasing newer, improved versions of existing consoles has been a trend the last decade). The second price drop will most likely occur in the final stages of the product lifecycle, to make the PlayStation 4 affordable to slow adopters.

Sony also sells PlayStation 4 bundles, which include one or more games for competitive prices. One example is the current ‘Bloodborne Bundle,’ which includes the console and three games for €449. The relatively low price of the PlayStation did not come without a price of its own though, as Sony predicted they would sell the consoles at a loss. This was admitted by the senior vice president of Sony Computer Entertainment, Masayasu Ito, in the year 2013 (Humphries, 2013). However, a new approach towards online gaming was meant to counter-balance these losses.

The PS Plus service mentioned in the product strategy paragraph had been a free service on the PlayStation 3. With the launch of the PlayStation 4, PS Plus became a paid membership service. In the Netherlands, PS Plus membership can be bought for a period of one month (€6.99), three months (€14.99) or twelve months (€49.99). This new strategy is vital for Sony, as paid memberships are a so-called sleeping form of income. Purchasing PS Plus allows the consumer to buy some games on the PlayStation store at a discount, thus buying a membership influences the prices of some games (but not all). It is interesting to note that the prices set by Sony in the digital store are not always the same as the prices in retail stores. An example is the PlayStation 4 game ‘Dragon Age: Inquisition,’ which is sold in the digital store for €69.99. Retail giant MediaMarkt, however, sells the same game for €59.99, which includes the price of shipping. This difference in price makes the digital version seem obsolete.

5.2.5 PlayStation 4 promotion strategy

As noted in the literature review above, there are four main ways of promoting a product: advertising, sales promotions, personal selling, and publicity. Sony has spent vast sums on the promotion of its PlayStation 4, including some promotional materials specific to the Netherlands. In the Netherlands, Sony released a Dutch version of one of its TV commercials, featuring a Dutch voice-over instead of the original English one. Moreover, PlayStation 4 advertisements can regularly be seen on Dutch television, especially those for new blockbuster games.

Aside from television, retailers and newspapers, Sony has released advertisements for other products that also feature the PlayStation 4. An example is the posters found at bus stops or train stations, which depict the new Sony smartphone. The poster uses the catchphrase “I can run through walls,” to indicate the connectivity between the smartphone and the console. A PlayStation console is shown at the bottom of the poster. Additionally, Sony uses advertisements and promotions created by the retailers selling the console. Sony makes clever use of social media to keep gamers up-to-date as well, by regularly posting new updates or discounts for games on platforms such as Facebook. PlayStation has a separate Facebook account for the Netherlands, which currently has approximately 166,000 followers.

The promotion of the console varies in different continents. Sony launched separate commercials in America and Europe. For Europe the slogan “This is 4 the Players” was used to promote the console, while in America the console was advertised with the slogan “Greatness awaits.” Furthermore, Sony extended its Champions League sponsor deal with UEFA, which allowed them to show the first PlayStation 4 TV commercials in Europe during the finals of the Champions League in 2013 (James, 2013). PlayStation 4 banners are now regularly seen during soccer matches on Dutch television.

Among the four main types of promotion, Sony has focused on the method of advertising, presenting their product on websites, television, in newspapers and on social media. Bart Hufen states that Sony also makes good use of their exclusive titles by creating advertisements especially for these games while promoting the console at the same time. Sales promotions are not as often used by Sony itself, but rather by the retailers who sell the console. MediaMarkt, for example, gave certain discounts during the holiday season.

Due to the impressive and somewhat unexpected sales volume, the PlayStation 4 was often mentioned positively in various media outlets, such as newspapers and radio. This publicity has been most valuable for Sony, as it presented their product as the superior console. In short, the main focus of Sony lies on advertising, while sales promotions are used through retailers and publicity is the by-product of the console’s success.

5.2.6 PlayStation 4 placement (distribution) strategy

The PlayStation 4 was launched in the Netherlands on the 29th of November in 2013 (Janssen, 2013). However, even before the official release date it was announced by several Dutch retailers that the first batch of consoles was already sold out, and that new pre-orders would be put in queue (Ubachs, 2013). Sony later stated that they would deliver a second shipment of consoles in December. Like the first batch, the second shipment of consoles was sold out within a few weeks, which led to some gamers having to wait seven weeks for their console. The only option was to pre-order the console and wait for the beginning of the new year (Techmania, 2013). Over the course of 2014, the console became available for purchase again, both in retail stores and online stores. Whether the low availability of the console was a deliberate strategy is unknown, but it may be assumed that Sony simply was not prepared for the enormous success.

According to Bart Hufen retailers are still the foremost distribution channel used by Sony to sell their consoles, as most gamers still prefer to buy their console themselves at a store. Additionally, Hufen dismisses the idea that Sony limited the availability of the consoles intentionally, stating that the primary goal of the company is to sell, so limiting your own stock makes no sense.

5.3 Microsoft Corporation

5.3.1 Company overview

Microsoft is a tech company founded Paul Allen and Bill Gates in 1975 (Bellis, n.d.) The name Microsoft was derived from the words Microcomputer and software. Microsoft gained recognition by developing various forms of software, such as programming languages, essential software and, most notably, operating systems for computers (Zachary, n.d.). Microsoft has now grown into something bigger than just a software company, producing various types of hardware, software and tech products. According to the official Microsoft website, the company mission is to "…enable people and businesses throughout the world to realize their full potential. We consider our mission statement a commitment to our customers. We deliver on that commitment by striving to create technology that is accessible to everyone—of all ages and abilities. Microsoft is one of the industry leaders in accessibility innovation and in building products that are safer and easier to use." (Microsoft, 2015).

The ambitions of Microsoft to develop a gaming console of its own started in 1998, when Seamus Blackley, Otto Berkes, Kevin Bachus and Ted Hase pitched their idea of a games console to Bill Gates (Marshall, 2013). According to Rick Marshall (2013), the initial idea was to create a game system that was similar to a PC, and to transfer the power and flexibility of a gaming PC to the console market. The system was named 'Xbox,' and would run on the Windows 2000 operating system. The console was officially announced at the Game Developers Conference on the 10th of March in 2000 by Bill Gates himself. The original Xbox was released in 2002 in Europe, but failed to convince many gamers (Marshall, 2013). The console did manage to gain more popularity in North America.

Though the original Xbox was not as popular as Microsoft had hoped, they had no intentions of retreating from the console market. Just three years after the launch of the original Xbox, MTV broadcast a huge event in collaboration with Microsoft in which they revealed their next-generation console. This new and improved console was named the ‘Xbox 360,’ and would change the role of Microsoft in the video game industry (Gilbert, 2013). The announcement of the Xbox 360 was presented with celebrities, a young audience having fun and intense music, indicating that this would be the console for enthusiastic gamers.

While the previous Xbox failed to gain significant popularity due to heavy competition from the PlayStation 2, the Xbox 360 rose to become one of the main contenders in the console industry, the other two being Sony and Nintendo. According to estimated numbers from the company Newzoo, there are approximately 535,000 Xbox 360 players active in the Netherlands (as of 2014). Like its predecessor, the Xbox 360 gained substantially more popularity in North America, probably because the product originated there. The Xbox 360 can be seen as the first non-Japanese console to offer serious competition on the console market.

In May 2013 Microsoft announced the newest instalment in the Xbox series. The new console was named ‘Xbox One,’ contrary to the popular belief that it would be named Xbox 720. Microsoft has yet to publish any concrete sales numbers, but the company stated that the Xbox One had shipped (not sold) around 10 million units worldwide by the end of 2014 (Thurrott, 2014). Microsoft has gone through some turbulent times recently, with CEO Steve Ballmer and Xbox Europe vice president Phil Harrison both leaving the company (Usher, 2015). It will be interesting to see how Microsoft attempts to defend its position within the gaming industry.

5.3.2 Xbox One segmentation

As stated before, it is extremely difficult to segment gamers solely based on demographic factors. According to Peter Warman, Microsoft (as well as other gaming companies) uses a new type of segmentation created by Newzoo. Instead of looking at demographic factors, the new segmentation revolves around various types of screens. These screens include television (consoles), handheld screens (portable), smartphones and tablets, and personal computers. This segmentation is used as an expansion of traditional segmentation models. According to Warman, segmentation in the gaming industry will change from standard segmentation to segmentation based on the screens a consumer uses in combination with the genres the gamer plays, a theory which is supported by Bart Hufen.

Hufen adds that, in his opinion, Microsoft has always been directed at more serious gamers (core gamers), who are older (25+) and perhaps a bit “nerdier” than others. He describes Microsoft as being a tech-brand, which appeals more to the older audiences. Peter Warman agrees that Microsoft is trying to target core gamers, but adds that the features of the product make it look more like a family console, thus sending mixed signals. Overall, it can be said that Microsoft is targeting core gamers who are 20 years old or above, and consider gaming a significant part of their life. Additionally, Microsoft targets those who desire multifunctional products with many features and additions.

5.3.3 Xbox One product strategy

In terms of product affect and cognition, Microsoft made several changes to their new console. The Xbox One offers many functions that the Xbox 360 could not, allowing consumers to play video games, as well as browse online, watch their favourite series and listen to music. Most of these features can be performed simultaneously. The Xbox One promises a console that is fully integrated with the living room of the consumer, allowing a full interactive experience for all its users.

An important observation by Peter Warman is that the gap between the generations of consoles becomes shorter with each new generation. The transition from the PlayStation 2 to PlayStation 3 and Xbox to Xbox 360 was a significant leap in technology. The same progress is simply not achievable with the newer generations, as it becomes more difficult to outperform the previous generation. The product attitude of the Xbox One does not differ from the PlayStation 4. Xbox One is sold in cardboard boxes featuring images of Xbox games. The main difference is of course the product on the box, and the colours that are used (Xbox: green, PlayStation: blue). The product environment of the Xbox One is also to the same as that of its competitor.

In terms of brand loyalty, it seems that Microsoft overestimated the loyalty of its consumers. This is the opinion of Peter Warman, who claims that Microsoft has been too arrogant in terms of their new console and strategies. Bart Hufen supports this statement further, and adds that the price, distribution and promotion strategies have also contributed to the relatively low success of the Xbox One.

With regard to product attributes, the new Xbox One replaces the design of the Xbox 360 with a more simplistic, straightforward design. Whereas the Xbox 360 stood perpendicular to the floor, the Xbox One has a rectangular shape so it can lie flat. The Xbox One takes a step forward in terms of hardware to meet the graphics and performance needs of the modern gamer. The Xbox One was released in black, but a special white edition was released to promote the videogame ‘Sunset

Overdrive.' As of today, the Xbox One is available in the Netherlands exclusively in black. When the console was released in the Netherlands, gamers could choose a version sold with an integrated Kinect camera, and another version without this extra piece of hardware.

Unlike the PlayStation, Xbox has consistently tried to improve its controllers in various ways. The latest controller, however, seems to make only minimal changes, especially in terms of design. The new controller had its buttons and grips modified to fit into the hand of the gamer better than its predecessor. The analogue sticks in particular have been altered to make it more comfortable for the thumbs. The Xbox One controller features a more prominent directional pad, which makes moving around in fighting games, for example, easier and more controllable. The shoulder buttons of the new controller are also considerably wider than those of the Xbox 360 controller, giving it a more natural feeling under the fingers. One of the more significant changes is the 'view' and 'menu' buttons, which have replaced the 'start' and 'back' buttons respectively. The controller also has an infrared sensor, which it can use to synchronise with a Kinect camera if one is in range.

Image 2: Xbox 360 controller. Jeff Grubb, website of Venturebeat, retrieved on 8 May 2015 from http://venturebeat.com/2012/06/03/nintendos-wii-u-pro-controller-may-make-microsoft-blush/

Image 3: Xbox One controller. Website of Evil Controllers, retrieved on 8 May 2015 from https://www.evilcontrollers.com/xbox-one-controller-creator.html

The main focus of the new Xbox can be found in the many applications it supports. The Xbox One is intended to be a multimedia centre rather than just a gaming console. It allows users to run two applications at the same time, for example playing a game and watching a soccer match. This feature is especially useful if you often switch back and forth between television and gaming. Other applications, such as Netflix and Twitch game streaming, are also available on the Xbox One. While there is no 'share' button on the controller, it is still possible to make screenshots and videos on the Xbox One through one of its many applications. The support section of the Xbox website allows the user to see which applications are active in his or her region.

The initial Xbox One had a built-in Kinect sensor, but this feature was later removed due to criticism from the public (Kohler, *Microsoft had no choice but to yank Kinect from Xbox One,* 2014). Another feature that was originally present in the Xbox One was a Digital Rights Management (DRM) policy, which prevented gamers from sharing games with friends or buying second-hand games. This new policy was met with heavy criticism from the gaming community, ultimately leading to Microsoft revising its policy and removing the DRM from the Xbox One console (Gilbert B, 2000). If gamers wish to play online with their Xbox One, they are required to purchase an Xbox Live Gold membership. Aside from being able to play online, Xbox Live Gold members receive special discounts for various types of content in the Xbox store, as well as several free downloadable games that are changed monthly.

5.3.4 Xbox One price strategy

The price strategies of the Xbox One clearly differ from those of the PlayStation 4. The first and most noticeable difference is that the Xbox One cost €500, which is €100 more than its competitor. In terms of price affect and cognition this is a rather illogical choice. When thinking rationally, going for the cheaper product makes more sense. Additionally, making the Xbox One so much more expensive may create negative emotions among consumers, as they have to pay more than the consumers of the competitor.

According to Bart Hufen, the price strategy of Microsoft for their Xbox is evidence of their arrogance. As Hufen states, Microsoft thought that, because they made billions with Windows, they could now do the same with Xbox. Sony, on the other hand, had more difficulties than Microsoft and played it safe. Hufen adds that the price difference of €100 had a significant influence on the consumers, even on the core gamers.

The negative effects of the price strategy did not go unnoticed, as Microsoft quickly changed the initial price of their console. During its initial release the Xbox One had a retail price of €499. This price was at least €100 higher than the original price of the Xbox 360, which was sold in two different versions for €299 and €399. The integrated Kinect camera of the Xbox One was presumably the cause of the higher price. The price of the Xbox One was quickly changed to €399 to compete with its rival. This price seems to be the long-term price of the Xbox One until the next model is released. Microsoft, however, has also made use of short-term price strategies, which Sony has not done. During the holiday season, Microsoft lowered the price of the Xbox One in the United States and in the United Kingdom. It did not lower the price for the Dutch market, however (Nu.nl, 2014).

The Xbox Live Gold membership, which allows gamers to play online, is available in three variations. The prices for this service, as stated on the official Xbox website, are €6.99 for one month, €19.99 for three months, and €59.99 for twelve months, making it slightly more expensive PS Plus. When it comes to digital sales, Xbox makes the same mistake Sony is making. In the Xbox marketplace, the game 'Dragon Age: Inquisition,' costs €69.99, while online store Bol.com sells the exact same game for €47.99, which is even cheaper than the PlayStation 4 version. These high prices for digital games seem to defy logic.

5.3.5 Xbox One promotion strategy

The promotion strategies used by Microsoft in the Netherlands appear to be the polar opposite of the strategies used by Sony. Whereas Sony invested heavily in advertising, the launch of the Xbox One took place without any promotional actions. There were no advertisements on television or in magazines. Most of the news concerning the Xbox One launch could only be found on tech and gaming websites. According to gaming journalist Martijn Steinpatz (2014), Microsoft brought the Xbox One to the Dutch market "in silence," leaving the promotion of the console to the retail partners selling it. Steinplatz adds that Microsoft chose to put more effort into the promotion by the retailers through allowing them to sell special pre-order bundles, which included two or three more games than usual. Microsoft also promotes Xbox One and its applications through their social media pages. Xbox has its own Dutch Facebook page with 29,400 followers at present.

In addition to the lack of promotional material, Bart Hufen states that, unlike the PlayStation 4, the Xbox One does not have many flagship games that it can use for advertising. Summarising Hufen, it appears that Microsoft has chosen to not use advertisements in the Netherlands at all. Instead, Microsoft relies on the sales promotions of retailers as their main source of promotion. Publicity is another form that Microsoft could use, but the amount of criticism regarding the Xbox One may have resulted in negative publicity rather than positive. Instead of countering any negative publicity, Microsoft has chosen to remain silent.

5.3.6 Xbox One placement (distribution) strategy

The Xbox One was released in the Netherlands on the 5th of September in 2014. Initially, the Xbox One was planned to have a worldwide release in 2013, but due to a series of complications several countries were excluded from the original release date, including the Netherlands and Belgium (Groeneveld, 2013). According to an official statement by Microsoft, the company had hoped to release the console in all markets at once, but due to multiple factors such as localisation of voice recognition, the Xbox was delayed (Groeneveld, 2013). The unplanned delay resulted in some gamers, and even some retailers, importing the console from nearby Germany. Before the official release date of the console, MediaMarkt already the Xbox One, which they most likely imported through the German branch of the company (Alen, 2014). Currently, the Xbox One is fully available in the Netherlands.

Peter Warman states that the delayed release of the Xbox One was a gross error by Microsoft. It gave Sony the time and opportunity to gain a larger market share in the Netherlands, an opportunity that Sony has made good use of. Bart Hufen adds that the localisation of the console could not have been a valid reason for Microsoft to delay their product, as most gamers in the Netherlands know English. Eventually, some of the larger retailers imported the Xbox One from Germany to gain at least some profits from the consumers with a strong desire for an Xbox.

5.4 Conclusion

After examining the strategies chosen by Sony and Microsoft, it is clear that the companies have taken drastically different approaches. Whereas Sony focused on a console with powerful hardware and sleek design, Microsoft opted for an ‘all-in-one’ machine with lots of added features. Sony made drastic changes in price in comparison with their previous console. By setting the recommended retail price at a relatively low level, Sony has made additional price drops unnecessary. Sony took a risk with this low price, however, as they now sell their consoles at a loss. To balance the losses Sony also changed the price strategy of their online services, as well as the price of their games. Microsoft, on the other hand, decided to increase the price of their console, which may have been done out of sheer (over)confidence. Repeated decreases in the price of the Xbox One show that the initial pricing of the Xbox One hampered its competitive position.

In terms of promotion Sony used a visibly more aggressive strategy than Microsoft. The new PlayStation 4 was promoted on television (alongside some of its flagship games), in newspapers, flyers, advertisements of retailers, and even on Dutch radio. Additionally, Sony made use of its cooperation with the Champions League to give its console a solid advertising platform. The success of the PlayStation was amplified by the publicity it received from other websites and media platforms. The approach of Microsoft appears to be the diametrically opposed, as they launched their console without any promotional material other than the advertisements of retailers and online media. Moreover, Microsoft chose to delay the release of the Xbox One in several countries to ensure the console was adequately localised for each region, while Sony entered the Dutch market almost a year earlier. Overall, it can be stated that Sony has put more effort into securing a solid position in the Dutch market than Microsoft has done.

6. Analysis

6.1 Introduction

The analysis chapter presents the results gathered from the published survey. The results from the surveys are the stepping stones for reaching the final conclusion. The survey, published on various game forums and social media pages, was completed by a total of 284 respondents, resulting in a validity of 90 percent (see chapter 4 for a more detailed explanation of research validity). The analysis focuses on the personal factors of the respondents, which can be connected to the segmentation and targeting strategies of Sony and Microsoft, as well as the strategies that have been used and how they have affected the internal psychological factors of the respondents. Furthermore, the analysis chapter takes a separate look at PlayStation 4 and Xbox One players, to find out if there are significant differences between the opinions of these groups.

6.2 Respondent personal factors

As mentioned in the methodology chapter, several questions in the survey were aimed at understanding the personal aspects of the respondents, such as personality and lifestyle. While it is impossible for companies to influence or change consumer personalities and lifestyles, they can attempt to aim their product towards a specific group of people with certain character traits, and to people following a specific type of lifestyle. Of the 284 respondents, 252 claimed to be involved with the gaming industry in some way on a daily basis, and to know all the current brands active in the industry. This indicates that most of the respondents were in fact avid gamers.

A majority (145 respondents) claimed to be between the ages 20 and 25, followed by 77 respondents between 26 and 30. Of the 284 respondents, 178 people described themselves as being creative, artistic and complex, as opposed to 106 people who think of themselves as simple, not so creative and non-artistic. Ninety of the respondents consider themselves chaotic, impulsive and reckless, while 194 think they are organised, careful and practical. A vast majority (206 respondents) claim to be assertive, talkative and open, as opposed to being silent and introverted. 222 respondents identify themselves as a friendly, helpful and accepting person, while only 62 respondents admit to being stubborn, demanding and distrustful. 200 of the respondents feel stable, relaxed and carefree, as opposed to 84 who claim to be emotional and slightly stressed. Using the five-factor model, the majority of the respondents could be seen as individuals who score high in conscientiousness, extraversion and agreeableness, while scoring low in neurotic tendencies. The area of openness is the most equally divided area of the five factors, although most people consider themselves as high-scoring individuals. Looking at the results of the five-factor questions, the average respondent can be considered a creative, organised, assertive, friendly and stable person between 20 and 25 years old who is active in the gaming scene.

The personality traits that were chosen most often could very well be the ones that are most important for both Sony and Microsoft. Arguments presented by Peter Warman (2015) support this statement. According to Warman, both Sony and Microsoft prefer people who have a large number of friends and are active in a community or on social media, as these people tend to share information more often with friends and acquaintances. It can be assumed that people who are friendly, talkative and relaxed are more likely to make friends than people who are unfriendly, sheltered and stressed. This type of activity and interaction is important for Sony and Microsoft, as these types of people are more likely to share their experiences with their friends and acquaintances. Although introverted, anxious and stubborn people also buy the consoles; it is highly likely that these individuals are not targeted as preferentially as those who are open and assertive, as the former are less prone to share their experiences with other people.

In the opinion of Bart Hufen (2015), segmentation in the gaming industry can no longer be based solely on demographics. He argues that a better way to segment the gaming market is through psychographics (lifestyle choices) and genres of gaming. In terms of lifestyle, two segments of the VALS™ framework were significantly more prominent than the other six. The graph below gives an overview of the survey results with regard to the lifestyles of the respondents.

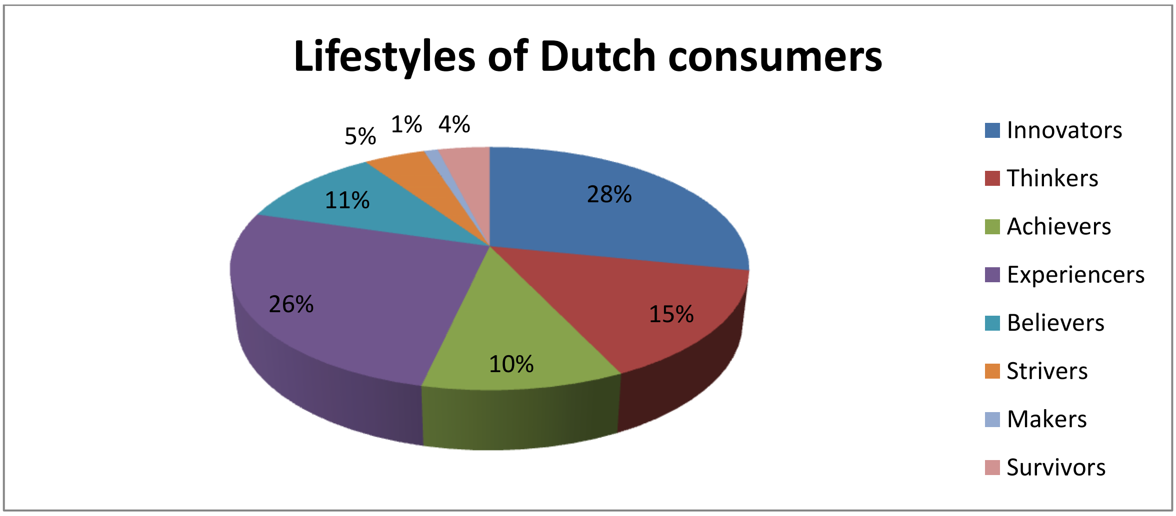


Chart 1: Overview of the lifestyles of respondents based on the segments of the American VALS™

According to the survey results, the majority of individuals who bought one of the new consoles consider themselves to fit best into the 'innovator' segment, meaning that they like new technology and are able to buy these technologies and prefer luxury or niche products. The innovators are closely followed by the experiencers, who identify themselves as young consumers who like to buy products that are seen as 'cool,' and follow the latest trends. In third place we find the thinkers, who consider themselves mature individuals with a tendency to buy products with long product life-cycles rather than luxury goods. The divide between the innovators and experiencers appears to be a logical outcome, as innovators are often the first ones to buy new products. As the new consoles were released recently, it makes sense that the first batches were bought by people who consider themselves to be innovators.

The experiencers, who become enthusiastic when encountering new things and tend to buy new products that represent the latest trends, can be seen as a logical follow-up to the innovators. The third group, the thinkers, tend to buy products with long-lasting functionality. The product life cycle of consoles has slowly increased over the years, so it is not odd that the thinkers buy a new console knowing that it will serve their needs for the following seven to eight years, perhaps even longer. Tied with the achievers are the believers, who prefer traditional norms and values and often buy products with a name that is well known, making them perhaps the group most likely to buy the consoles based on brand loyalty. Interestingly enough, the survivors group is not the smallest group of all, meaning that even people with a low budget and focused lifestyle bought the newest consoles. Eight of the 11 people who chose ‘survivor’ as their lifestyle group fell into the age category of 20 to 25.

Based on the results of the survey, it can be stated that Sony and Microsoft both reached the audiences that they were planning to persuade to purchase their console. With the current pricing and functions, the consoles were primarily bought by the innovators and experiencers, who tend to buy what is new, niche or trendy. In the future, the companies may alter their strategies by, for example, changing the price or focusing advertisements on other groups such as families to reach the other segments of the VALS™ framework as well.

6.3 PlayStation 4 buyer characteristics

The results of the survey indicate that Sony is more prominent in the Dutch gaming market. A total of 173 (61.07 percent) of the respondents own a PlayStation 4, as opposed to 83 (29.29 percent) Xbox One owners. Only 28 (9.64 percent) of the respondents have both consoles. The prominence of the PlayStation 4 is proven further by research conducted by Newzoo in 2014, which revealed that approximately 535,000 gamers in the Netherlands use the PlayStation 4, while the Xbox One is used by 195,000 players –a very significant difference.

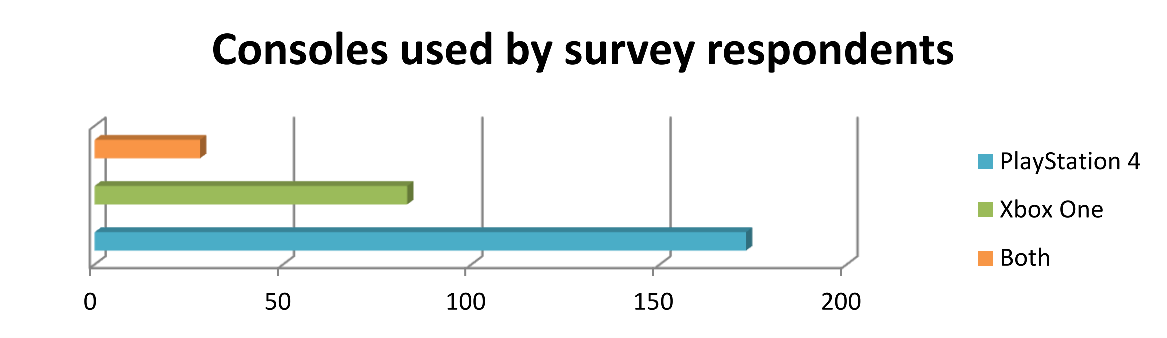


Chart 2: Gaming consoles owned by survey respondents.

Having discussed personality and lifestyle, let us now look at the psychological factors of the gamers. The first aspect examined is knowledge. Where and how the respondents acquired their knowledge can be ascertained from the question "where did you hear about the console for the first time?" According to the survey results, 51.5 percent of the PlayStation owners first heard about the console through promotional activities created by Sony, such as internet and television commercials, but also the initial announcement and E3 press conferences. Around 37 percent of the respondents received their first information through external websites, while only 10 percent found out about the new console by communicating with friends and family. These results indicate that Sony's own promotion of the PlayStation 4 has met with success, as most received their information by this means.

The next question focuses the main emphasis of these promotional tools. When asked about the first thing he or she had heard about the PlayStation 4, most of the respondents answered with hardware specifications (34 percent), product features such as applications and support of other hardware (32 percent), the games playable on the console (19 percent) and the price (13 percent). The other two percent of the respondents gave answers such as "the press conference," and "the looks of the console." The results of this question indicate that the majority of the respondents received information about the hardware of the console first.

Turning now to motives, the primary motivation of PlayStation customers to buy a new console consisted largely of two of the possible answers. The majority of the respondents (approximately 62 percent) claim that they bought a new console because they thought it was time to replace their old one. The other primary motivation for PlayStation gamers to buy a new console is because they simply always want to possess the newest products available (49 percent). A mere 13 percent of the respondents claimed to have bought the new console due to friends buying it as well. Several miscellaneous answers included stating that the console was a gift, or that it was bought to play one particular game (11 percent). Six percent of the gamers answered that they were new to gaming and wanted to try it out for themselves. (Note: the cumulative answers exceed 100 percent as multiple responses were allowed.) Using this data, it can be concluded that most of the PlayStation gamers bought the console because of the drive to replace an older product that, in the opinion of the respondents, had outlived its usefulness, or simply because they wanted the newest console.

The secondary motivation, which is arguably more important than the primary motivation, identifies why respondents chose the PlayStation 4 instead of the Xbox One. A vast majority of the respondents who chose the PlayStation 4 (80.61 percent) did so because they deemed the console to be better than its competitors. Only 22.42 percent, however, chose the console because they consider Sony to be better than its competitors, showing that the Sony brand name is relatively unimportant for the gamers. The product strategy, on the other hand, has had a major influence on the motivation of gamers to buy a PlayStation 4. Nearly 55 percent of the respondents chose a PlayStation due to the games available on the console, most notably Bloodborne. This game was mentioned in the ‘other’ section multiple times. The price of the product was mentioned by 35 percent of the respondents, showing that this factor has certainly affected the choice of the consumers. For about nine percent of the respondents, another reason to buy the console was because they like to play online with friends, and their friends bought this console as well. It was the product itself, however, that was most important for many of the respondents.

The fact that most gamers chose the PlayStation 4 because they deemed it to be a better console, the fact that they want to play online with friends, and the fact that relatively little value was attached to the name of the brand, may indicate that the choice of gamers to buy a PlayStation 4 was mostly a rational choice rather than an emotional one. With only a few exceptions, most respondents claim to have bought the console because they consider it better, thus being able to meet their needs and wants more adequately than the competitor. Buying the console to play with friends is also not an emotional motivation, as players simply chose the console which allowed them to do so – a rational choice.

Following motivation is attitude, which is gauged through a series of questions. The first question elicits the general opinion of the respondent in relation to the company. The second question aims to uncover what factors have influenced the opinions of the respondents. The chart below indicates how positively or negatively the Sony Company is perceived by the consumers who bought the PlayStation 4.

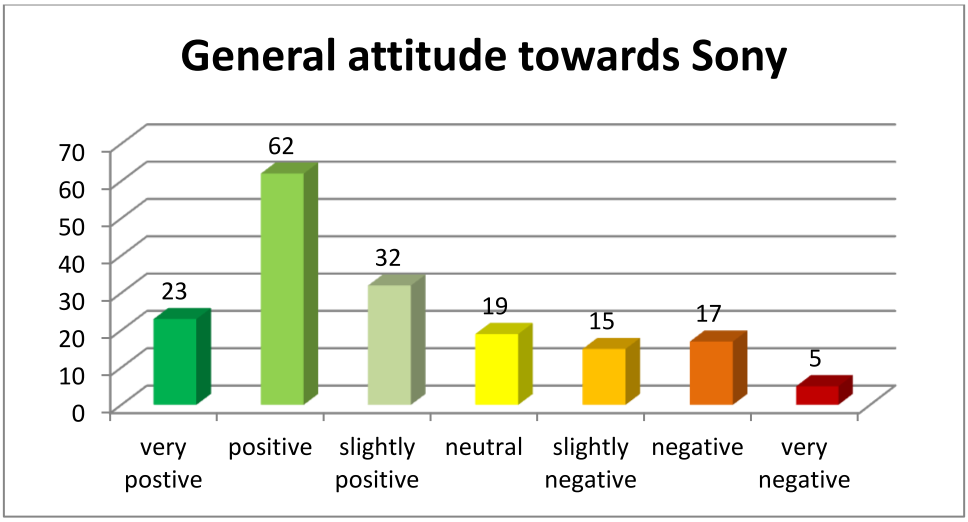


Chart 3: General attitude of respondents towards Sony

As shown in the graph above, the general attitude towards Sony is predominantly positive. The reasons for this attitude can be drawn from the question that follows. When respondents were asked what influenced their opinions, experience with other products of the brand led with 74.1 percent of all responses. In second place were the promotional tools used by the company, chosen by 38 percent of the respondents. 32 percent responded that company policies influenced their attitude, while 23 percent considered communication with family and friends to be the influential factor.

For further analysis of why people have certain opinions, let us take a closer look at the groups that answered this question with ‘very positive,’ ‘positive,’ ‘negative,’ and ‘very negative.’ Of the 23 respondents who have a very positive opinion towards Sony, 19 of them claimed this was due to experience with other products of the company. Nine respondents stated that the promotion of the company played a role, and nine chose company policy. Only four people claimed that friends or family influenced their opinion. The gamers with a positive attitude were mostly influenced by experience with other Sony products (45 respondents). Twenty-five of the respondents state that the promotional tools of Sony influenced their positive attitude, while only 16 respondents cited company policy. 14 people claimed to have been influenced by communication with others.

On the opposite side of the chart, 17 people answered they have a negative attitude towards Sony, even though they have bought a PlayStation 4. Of these 17 respondents, most chose experience with other products as the main reason for their attitude (13 respondents). Only six people listed promotion among their answers, while even fewer people chose company policy (two respondents). Communication from others influenced only four of the 17 respondents. The five “very negative” attitudes came about because of experience with other Sony products (four out of five), promotion by Sony (one out of five), company policy (two out of five), and communication with others (one out of five). It is interesting to see that experience with other Sony products was the main factor for both positive and negative attitudes towards the company.

The next question focuses on the attitude towards the console, rather than towards the company itself. It is immediately noticeable that several factors played a very large role in forming the attitude of gamers, rather than one single factor that stands out. One hundred forty respondents (83 percent) deemed the features of the console to be the most important influential factor. In second place came the games available on the console, chosen by 122 gamers (74 percent). The price of the console was third with 98 (59 percent) of the respondents, showing that the price strategy of Sony has indeed played an important role. Promotion was chosen by 61 (approximately 36 percent) of the respondents, while 50 respondents (29 percent) found the appearance of the console to be important and just 27 (16 percent) were influenced by communication with others. In short, the console's features, games and price were the three most significant factors influencing the attitudes of the PlayStation consumers.

6.4 Xbox One buyer characteristics

The Xbox One buyers were asked the same questions as the PlayStation 4 buyers. By comparing the responses of the Xbox One buyers with the analysis of the PlayStation consumers, it is possible to determine whether Xbox One consumers differ in their means of gaining knowledge, their motivation and attitudes. According to the results of the survey, 39 of the respondents (49 percent) acquired their information through promotional tools from Microsoft. This is interesting, as Microsoft did not particularly promote their console in the Netherlands. This being the case, we may assume that the respondents got their information through the original announcements and press conferences by Microsoft. In second place come external websites, with 30 respondents (35 percent) choosing this option. Friends and family amount to 16 percent of the total answers.

The second question is the first to show clear differences between the answers of the PlayStation gamers and Xbox gamers. Instead of a somewhat equal division between hardware specifications and product features as we saw with the PlayStation 4, the first knowledge that respondents acquired about the Xbox One mainly revolved around the product features of the console. Forty-four respondents (55.7 percent) answered with the features, while only 11 (14 percent) answered with hardware specifications. This seems to indicate a clear difference in the promotional strategies of Sony and Microsoft, with Sony placing more emphasis on the hardware, while Microsoft focuses on the console's multifunctional capabilities. The price follows in third place with 15 (19 percent) of the total respondents, followed by the available games (nine percent).

When asked about their primary motivation to buy one of the new consoles, the Xbox One customers do not differ significantly from the PlayStation 4 respondents. Mirroring the PlayStation consumers, the primary motivation for the Xbox respondents to buy a new console was because they thought their old console was in need of replacement. Sixty respondents (72 percent) chose this option, followed by 32 respondents (41 percent) who simply wanted to have the newest console. Eleven respondents (14 percent) chose the console due to their friends buying the console as well; while a mere three respondents (four percent) claimed to be new to gaming. In brief, Xbox gamers, much like PlayStation gamers, believed the life cycle of their old consoles to be over, resulting in the drive to buy one of the new consoles.

The secondary motivations of Xbox One consumers seem to differ slightly from those of the PlayStation 4 consumers. As with their PlayStation counterparts, Xbox gamers mainly claim to have bought the console because they think of it as the superior console (approximately 54 percent). However, a major difference between Sony and Microsoft consumers is that the Xbox buyers seem to value brand name considerably more than PlayStation gamers. As much as 49 percent of the respondents claimed that they see Microsoft as a superior brand, which is a noticeable difference from the Sony consumers, who fell far short of this percentage. A second noticeable difference is the fact that only 21 (around 27 percent) of the respondents identified available games as their reason for buying the console, whereas Sony gamers exceeded 50 percent for this option. The price of the product was chosen by only three of the respondents. It is possible that these respondents bought the Xbox One after its price was lowered, as otherwise choosing the price as a reason to buy it makes little sense. In the ‘other’ option, several people claim to have bought the Xbox for its multifunctional capabilities, or because they have had good experiences with the previous Xbox.

The responses of the Xbox gamers seem to be quite the opposite of those given by the Sony gamers. The importance of the brand for the consumers that chose an Xbox indicates their choice may have been a more emotional choice, as opposed to a rational one. In the case of Microsoft customers, it seems that there is a bit of a divide in rational and emotional buyers. Five respondents also admitted to have bought an Xbox because their friends bought one, which is more of a rational reason. Additionally, four people answered that their choice was based on the fact they used to own the Xbox 360, and the Xbox gameplay appealed to them. One person stated that he did not choose the Xbox One himself, but it was bought for him. This suggests that brand experience and brand name may be more important for the Xbox respondents than it is for PlayStation respondents.

The attitudes of the Xbox gamers towards Microsoft are visibly more divided than the attitudes of the PlayStation gamers towards Sony. The following graph shows the attitudes of the gamers, ranging from very positive to very negative.

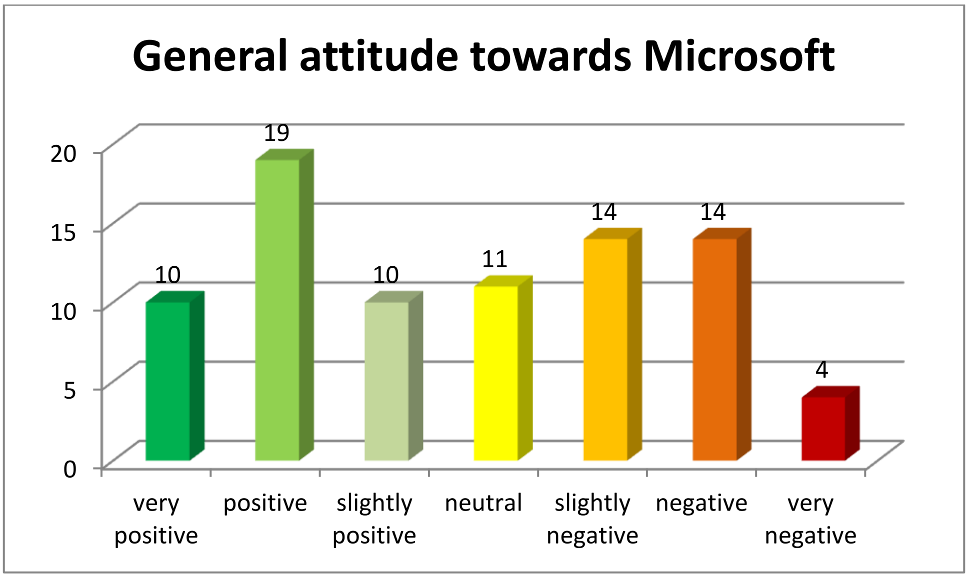


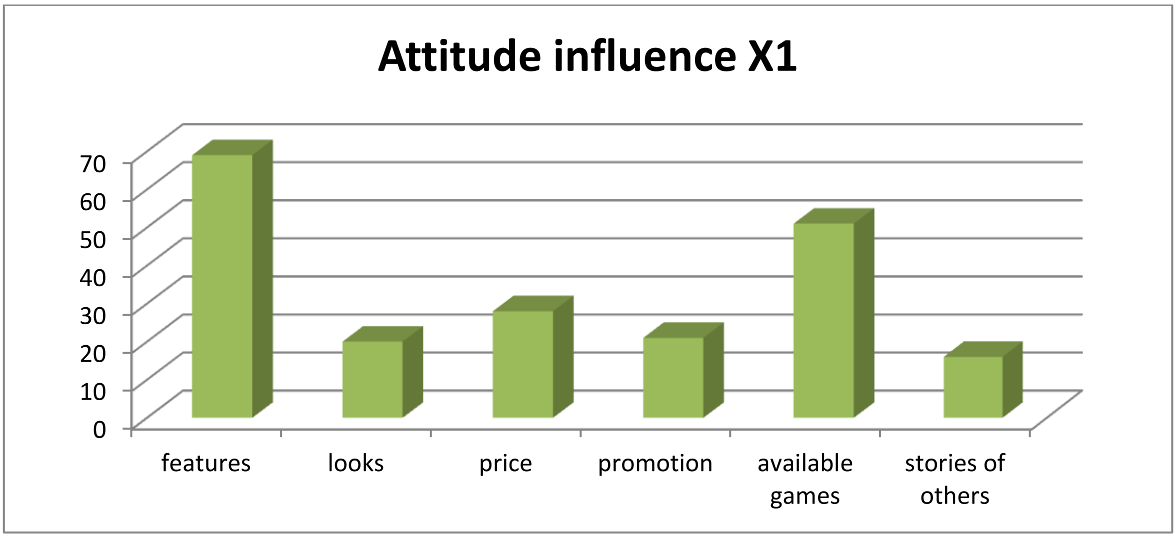
Chart 4: General attitude of respondents towards Microsoft.

While the positive attitudes are the dominant group, just as in the PlayStation chart, it is immediately evident that the chart with the answers of Xbox One buyers is much more evenly divided between positive and negative attitudes. When asked about the dominant factors of influence for these attitudes, experience with other products of the brand was by far the most frequent answer. Seventy respondents (85 percent) chose this option as an influencing factor. The second position goes to company policy with 22 (around 28 percent) of the respondents. Communication with others comes in third place with 19 (24 percent) total votes, followed by promotional materials with ten (approximately 13 percent). The fact that promotion was chosen so infrequently may be due to the lack of any Microsoft promotional activities in the Netherlands.

For deeper analysis, let us turn once again to the very positive, positive, negative and very negative columns. Of the ten respondents who claimed to have a very positive attitude towards Microsoft, six stated that it was due to experiences with other products, while only one person mentioned promotion by the company as a factor. Company policy also received one response, and communication with others received three. Of the 19 respondents with a positive attitude, 15 chose experience with other products of the company. A single person chose promotion by the company. Four people claimed to have been influenced by stories told by others.

Among the respondents with a negative attitude, 13 of the 14 claim to have formed this opinion based on experience with other Microsoft products. Three respondents blamed company promotion for their negative attitude, as well as three votes for company policies. An additional three votes went to communication with other people about the company. Of the very negative attitudes, two out of four respondents identified experience with other products as one of the most prominent reasons for their attitude. One person chose promotion as a factor, and the same person also indicated that company policy was a second reason. Company policy was selected chosen by two respondents in total, while communication with others only amounted to one.

The question regarding the attitude of respondents towards the console itself rather than Microsoft as a company indicates that the features of the console are the most important factor influencing the attitudes of the gamers. Behind their 69 votes (84 percent), the features are most closely followed by the available games on the console, which received 51 (approximately 64 percent) responses. Third place was the price of the console with 28 respondents, which amounts to 35 percent. This is interesting, as in previous questions it was apparent that nearly none of the respondents bought the console due to its price. This leads to the speculation that the price of the console actually affected the attitude of consumers negatively rather than positively. The promotion and appearance of the console share fourth place, followed by communication with friends and family, which garnered 16 (20 percent) of the votes. In brief, the main factors influencing the attitude of the gamers towards the Xbox One were the features, available games, and price of the console.



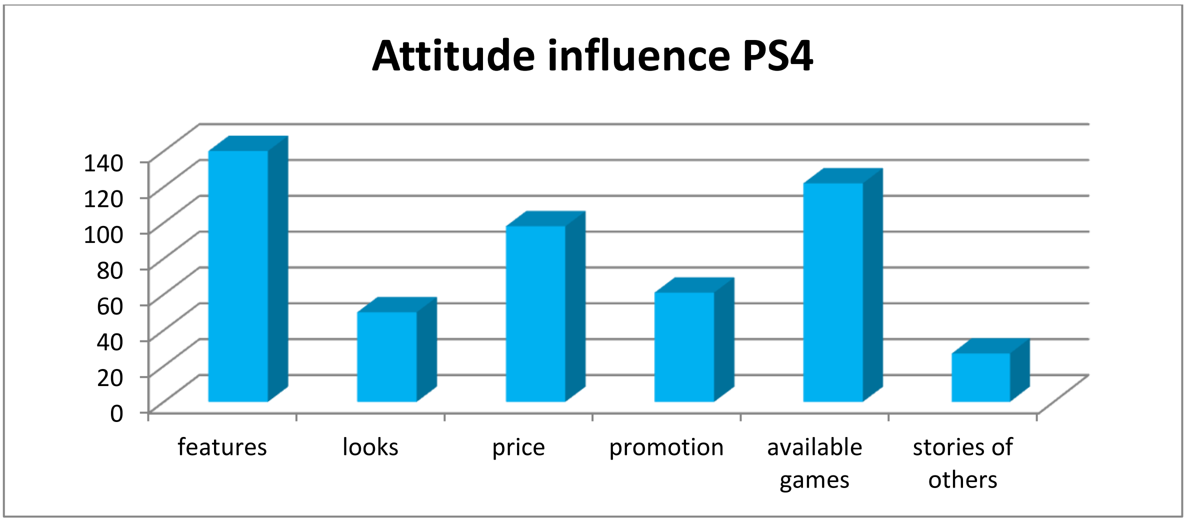


Chart 5 & 6: Comparison of factors influencing the attitude of Xbox One gamers and PlayStation 4 gamers; note that in terms of percentages there is little difference between the two

6.5 Console cross-over

An interesting method to test the brand loyalty within the gaming industry is to see whether consumers have switched between consoles over the years. Using the information gained from the survey, it is possible to get a general overview of how many people switched from an Xbox 360 to a PlayStation 4, or vice versa. For this analysis the report only includes people who had one of both consoles, meaning that if a person had both the Xbox 360 and PlayStation 3, and has now bought a PlayStation 4, he is not taken into account. The following graph meant to include only those respondents who completely switched from one brand to another in the last generation. When analysing the results, it can be seen that of the 173 respondents who own a PlayStation 4, 62 used to have an Xbox 360 without owning a PlayStation 3 as well. Conversely, of the 83 gamers who now have an Xbox One, 23 used to play on a PlayStation 3.

These numbers indicate that a fair amount of Xbox 360 users have switched to a PlayStation 4, while the switch from PlayStation 3 to Xbox One was significantly less frequent. The high number of respondents owning the Sony product, as well as the clear differences between the approval of Sony and Microsoft, show that Sony has gained more followers with the release of their newest generation, and although Microsoft managed to claim some of the former Sony players, this amount is relatively small in comparison to their competitor.

7. Conclusion and recommendations

7.1 Conclusion

The main question of this research, '*due to what reasons Dutch consumers buy a PlayStation 4 or Xbox One, and how is this decision affected by strategies used by Sony and Microsoft,'* can now be answered using the data gathered through the desk and field research. The combination of the case study and survey results indicates the relative success that the strategies of Sony and Microsoft have had. With their product strategies both companies released consoles that provide not only a gaming experience, but also additional features such as television, online entertainment and music. The product strategy itself heavily influenced the motivation of gamers, as they wanted to replace their older consoles or simply buy the newest available technology. Gamers who bought the PlayStation mainly did so because they believe the console is superior to its competitor. Xbox gamers are more divided between thinking their console is the better product and preferring the Microsoft brand name, indicating that Xbox gamers attach greater value to the brand of their console than PlayStation gamers.

The product strategies were also of great importance for the attitude of consumers. This applies to both PlayStation gamers and Xbox gamers. The main aspect of the product strategy that influenced attitude is the product features. For both consoles the features scored remarkably high as factors influencing attitude. The product attributes, such as the appearance of the console, were relatively unimportant, although PlayStation gamers chose it slightly more often than Xbox gamers. In sum, the product strategies of both Sony and Microsoft influenced consumer motivation (both primary and secondary) and consumer attitude. Although the appearance of the consoles was not the most important factor, it was nevertheless chosen by several respondents, thus leading to the conclusion that perception was also influenced to some degree by the product strategy.

The price strategy of Sony was to offer their console at a lower price than that of their competitor, which had positive effects on consumer motivations. In the survey 35 percent of the PlayStation consumers stated that price influenced their motivation to choose this console, indicating that the price was indeed a relevant factor. The price strategy adopted by Microsoft was chosen by very few of the respondents as a factor influencing their motivation to buy the console. The combination of the large number of PlayStation gamers who bought the console due to its lower price, and the lack of motivation influenced through the pricing of the Xbox, lead to the conclusion that Sony succeeded in influencing consumer motivation through their pricing while Microsoft did not.

The survey results show that the pricing also influenced consumer attitudes. For PlayStation gamers the price was a significant factor in this regard. Of the 173 PlayStation respondents, 98 claimed that the price affected their attitude, while only 28 of the 84 Xbox respondents chose this as a factor. While many PlayStation gamers were influenced by the lower price, relatively few Xbox gamers altered their attitudes based on the price of the console. This indicates that the higher price of the Xbox did not necessarily affect their attitudes. In short, the pricing strategy of Sony influenced both the motivations and attitudes of their consumers, while the higher price of Xbox did not motivate people to buy their console, but also did not have detrimental effects on consumer attitudes.

The promotion strategies of the two companies were as different as day and night. Naturally, the promotion strategies influenced the internal factor of knowledge, which is the main goal of promotional materials. The active promotion of the PlayStation 4 certainly reached its audience, as more than half of the respondents claimed to have gotten their first information about the PlayStation 4 through promotion by Sony. However, a relatively small portion of the PlayStation respondents claim that their attitude was influenced by the promotional material used by Sony. The promotional materials for the PlayStation 4 focused on its powerful hardware, exclusive games and additional features. Sony's promotional campaigns seem to have met with success, as 34 percent of the respondents claim that the first information they received about the console was about the product hardware, 32 percent chose features, and 19 percent heard about the available games first.

Although Microsoft did not have an active promotion strategy in the Netherlands, the promotion still had an effect on Dutch consumers. Almost half of the Xbox respondents claim to have obtained their information through promotional tools produced by Microsoft, which indicates that the respondents encountered promotional activities by Microsoft that were not specifically made for the Dutch market. The answers of respondents show that the initial announcement and E3 press conferences in America were important events for the promotion of the Xbox One. Microsoft presented the Xbox One as a multifunctional machine that allowed integration with television and online applications. This strategy seems to have been successful, as more than half of the respondents heard of the features of the console first. The emphasis on the features rather than the hardware is clearly visible in the answers given by respondents, as only 14 percent of the respondents found information on hardware first. The lack of game-oriented promotion regarding the Xbox early on is confirmed by the mere nine respondents who stated they first heard about available games on the Xbox.

For the Xbox gamers promotion was of less importance in terms of attitude, even though Microsoft tried to convince gamers that the Xbox One would be their all-in-one machine without boundaries. Only 21 respondents chose promotion by Microsoft as a factor affecting their attitude. In sum, the promotional strategies of Sony and Microsoft were meant to influence consumer knowledge, motivation and attitude. Sony was successful with its focus on hardware, features and games. Given that the features were also an important influencing factor for motivation, it can be deduced that the promotion of the PlayStation 4 affected consumer motivation as well. Additionally, for some consumers the promotion was a factor in their attitude. Although Microsoft decided not to advertise in the Netherlands, their promotional strategy still reached the Dutch gamers through other media outlets. The promotion, or perhaps the lack thereof, has had some influence on the attitudes of Dutch gamers.

Although the topic was not represented in the survey, the placement strategies of Sony and Microsoft have undoubtedly affected Dutch consumers. As noted by Peter Warman, Microsoft’s choice to enter the Dutch market one year later was a detrimental mistake, as it allowed Sony to gain more market share and loyalty among Dutch consumers. Warman adds that these strategies have resulted in Microsoft being seen as arrogant. Bart Hufen agrees, stating the higher price, lack of promotion and delayed release was a cluster of negative factors resulting in a huge dent in the credibility of Microsoft. As both of these researchers show, the delay of the Xbox may have influenced the attitudes and motivations of Dutch consumers.

7.2 Recommendations

7.2.1 Recommendations for Sony and Microsoft

This research has given a broad overview of why Dutch gamers have chosen either the Xbox One or the PlayStation 4. To ensure that the PlayStation 4 continues its success amongst the Dutch gamers, the company should focus on releasing new (exclusive) games and pairing them with commercials on media platforms such as television. Additionally, Sony should continue releasing new updates for their console to keep up with consumer demands. With the PlayStation 4 already having gathered a stable customer base, Sony could attempt to shape their console into what Microsoft hoped that the Xbox One would be, namely a machine that fully integrates with the living room. To do this, Sony should look for other new platforms to partner their console with, as Xbox has done with various sports organisations.

If Microsoft would like to improve its position in the Dutch market, it must make some changes. First of all, the company should develop at least some form of promotion for the console, whether on television, radio, or in newspapers. By now most, if not all, gamers know that the Xbox is available in the Netherlands, but Microsoft could try a different approach to sell their console. The Xbox One may be primarily a gaming console, but the additional features also make it a ‘family console’ with something for every member of the family to enjoy. Microsoft may have missed most of the core gamers, so switching their attention to families or hobbyist gamers could help them to increase the sales of the Xbox One.

Currently, both companies are developing new technology. Sony is preparing Morpheus (virtual reality glasses), for which they have even opened a separate development studio, while Microsoft is working on the Microsoft Hololens (augmented reality). One of the dangers that both companies are now facing is that they will focus too much on technological innovations. There have been several trends in the gaming industry, such as 3D gaming, that have been rather unsuccessful. As stated by Peter Warman, the biggest mistake a company can make is focusing solely on tech trends while neglecting the trends in consumer behaviour. Both Sony and Microsoft must be aware of the fact that their new 'innovative' products could easily become something that most gamers cannot afford, or turn into more of a gaming gimmick than an actual product that gamers want to use.

Another important factor that both companies should be aware of is the increasing influence of mobile gaming within the sector. For Sony, it may be difficult to utilise the full potential of mobile gaming, as they have downsized their mobile sector. Microsoft, however, has a great deal of potential to develop links between their products. It will be possible to link the Xbox One to the new operating system, Windows 10, allowing Microsoft to connect their console to computers, tablets and phones running on this operating system. This will in turn create new opportunities for mobile gaming and interconnectivity.

One vital trend in the gaming industry that neither Sony nor Microsoft can ignore is the digitisation of gaming. Various services within the gaming sector, most notably Steam, offer games as digital downloads. At the same time, Steam allows developers to set their own prices, which gives developers much more freedom on this platform than on the current generation of consoles. As mentioned in chapter five, the digital prices of games rarely change in the PlayStation Store and Xbox Marketplace, which gives the companies an uncompetitive position relative to their PC counterparts. Sony is currently working on an internet-based game-streaming service. This may prove to be a smart decision, as this generation of physical consoles could very well be the last we ever see.

7.2.2 Recommendations for further research

As has been acknowledged a number of times, this research was limited in various areas. Firstly, it focused solely on the internal factors of consumer behaviour. Future research projects could take external factors into account as well, namely cultural and sociological influences. Additionally, further research could devote more attention to the decision-making process in order to determine the exact points in the consumer decision-making process at which internal factors are influenced. Any future research could also expand the theoretical framework used in this research, for example by adding additional Ps to the marketing mix segment.

Secondly, several methods and models used in this report may not directly apply to Dutch consumers. As mentioned, the VALS™ model was originally developed for American consumers, which calls into question its applicability to other countries. Future researchers could find alternative models specific to the lifestyle segments of Dutch consumers, to ensure that all data is valid. Additionally, the five-factor model was used only partially when conducting the survey, thus resulting in data that may or may not be fully valid. This being the case, the results of this research should not be perceived as the one and only truth, but merely as a reference and helpful tool for future research.

Thirdly, future research projects could be made more accurate by obtaining more information directly from the companies themselves. As a student, the present researcher was not permitted to conduct interviews or gather internal information from Sony or Microsoft, which limited the amount of source materials and resulted in some of the conclusions in this report being based on assumptions. Moreover, future research could attempt to gather data from a larger audience. Due to the limited amount of time available to conduct this research, it was not possible to create a larger sample size. Future research using information from more respondents would lend greater validity to the information.

In short, the main recommendation for this research is to approach its contents critically. The use of models originally created for markets outside of the Netherlands, models that were only partially integrated into the research, and the limited time result in data that should be interpreted cautiously. Instead, this report should be seen as a reference to be used in future research, a part of a greater whole.

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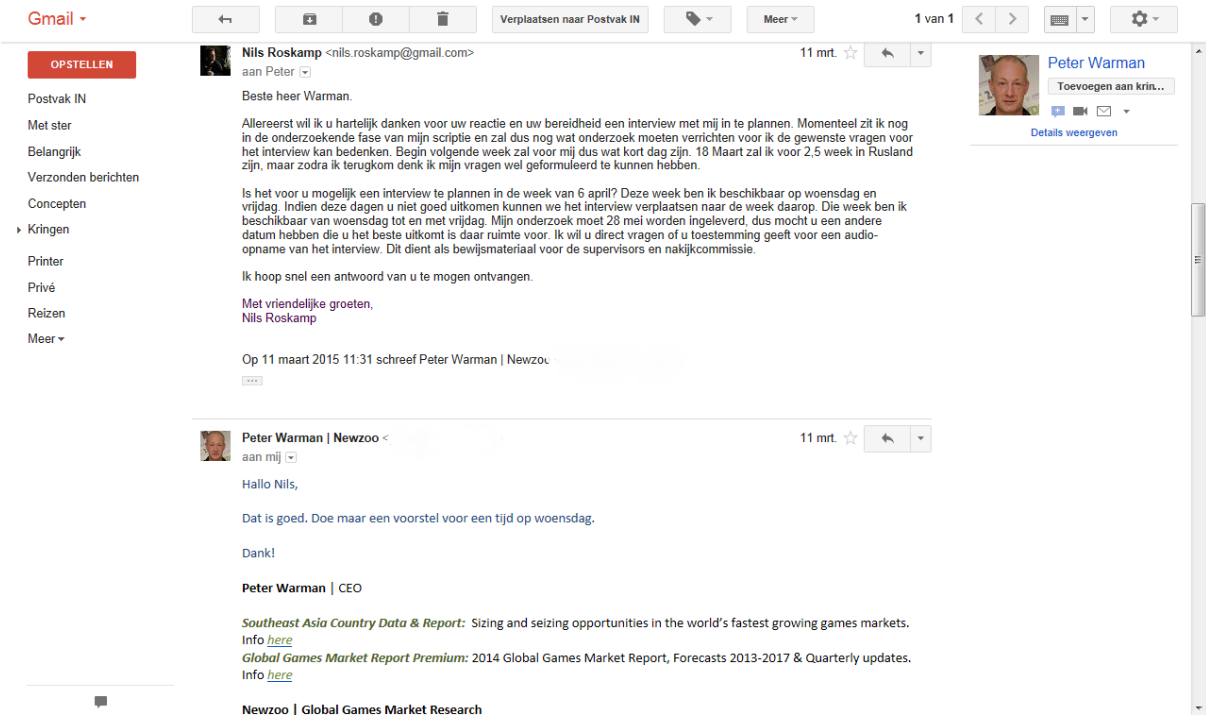
Appendices

Appendix I – email correspondence, Peter Warman



Nils Roskamp <nils.roskamp@gmail.com> 11 mrt.
aan Peter

Beste heer Warman.

Allereerst wil ik u hartelijk danken voor uw reactie en uw bereidheid een interview met mij in te plannen. Momenteel zit ik nog in de onderzoekende fase van mijn scriptie en zal dus nog wat onderzoek moeten verrichten voor ik de gewenste vragen voor het interview kan bedenken. Begin volgende week zal voor mij dus wat kort dag zijn. 18 Maart zal ik voor 2,5 week in Rusland zijn, maar zodra ik terugkom denk ik mijn vragen wel geformuleerd te kunnen hebben.

Is het voor u mogelijk een interview te plannen in de week van 6 april? Deze week ben ik beschikbaar op woensdag en vrijdag. Indien deze dagen u niet goed uitkomen kunnen we het interview verplaatsen naar de week daarop. Die week ben ik beschikbaar van woensdag tot en met vrijdag. Mijn onderzoek moet 28 mei worden ingeleverd, dus mocht u een andere datum hebben die u het beste uitkomt is daar ruimte voor. Ik wil u direct vragen of u toestemming geeft voor een audio-opname van het interview. Dit dient als bewijsmateriaal voor de supervisors en nakijkcommissie.

Ik hoop snel een antwoord van u te mogen ontvangen.

Met vriendelijke groeten,
Nils Roskamp

Op 11 maart 2015 11:31 schreef Peter Warman | Newzoo

Peter Warman | Newzoo 11 mrt.
aan mij

Hallo Nils,

Dat is goed. Doe maar een voorstel voor een tijd op woensdag.

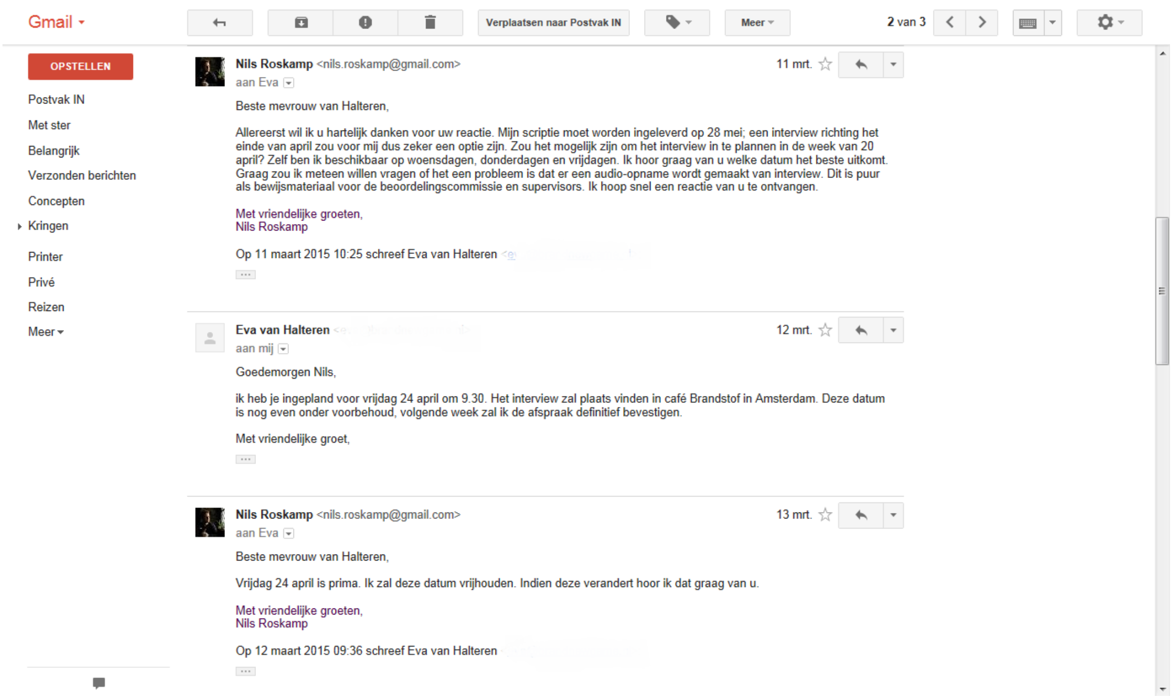
Dank!

Peter Warman | CEO

Southeast Asia Country Data & Report: Sizing and seizing opportunities in the world's fastest growing games markets.
Info *here*
Global Games Market Report Premium: 2014 Global Games Market Report, Forecasts 2013-2017 & Quarterly updates.
Info *here*

Newzoo | Global Games Market Research

Appendix II – email correspondence, Bart Hufen (Eva van Halteren)



Nils Roskamp <nils.roskamp@gmail.com> 11 mrt.
aan Eva

Beste mevrouw van Halteren,

Allereerst wil ik u hartelijk danken voor uw reactie. Mijn scriptie moet worden ingeleverd op 28 mei; een interview richting het einde van april zou voor mij dus zeker een optie zijn. Zou het mogelijk zijn om het interview in te plannen in de week van 20 april? Zelf ben ik beschikbaar op woensdagen, donderdagen en vrijdagen. Ik hoor graag van u welke datum het beste uitkomt. Graag zou ik meteen willen vragen of het een probleem is dat er een audio-opname wordt gemaakt van interview. Dit is puur als bewijsmateriaal voor de beoordelingscommissie en supervisors. Ik hoop snel een reactie van u te ontvangen.

Met vriendelijke groeten,
Nils Roskamp

Op 11 maart 2015 10:25 schreef Eva van Halteren

Eva van Halteren 12 mrt.
aan mij

Goedemorgen Nils,

ik heb je ingepland voor vrijdag 24 april om 9.30. Het interview zal plaats vinden in café Brandstof in Amsterdam. Deze datum is nog even onder voorbehoud, volgende week zal ik de afspraak definitief bevestigen.

Met vriendelijke groet,

Nils Roskamp <nils.roskamp@gmail.com> 13 mrt.
aan Eva

Beste mevrouw van Halteren,

Vrijdag 24 april is prima. Ik zal deze datum vrijhouden. Indien deze verandert hoor ik dat graag van u.

Met vriendelijke groeten,
Nils Roskamp

Op 12 maart 2015 09:36 schreef Eva van Halteren

Appendix III – transcript of interview, Peter Warman (Dutch)

Interview 1: Peter Warman, Newzoo

Nils: Allereerst heel erg bedankt dat ik dit interview mag afnemen. Zou u zich misschien voor kunnen stellen en kort uitleggen wat u doet?

Peter: Mijn naam is Peter Warman, ik ben nu de medeoprichter en baas van het bedrijf 'Newzoo,' dat in principe een marktonderzoeksbureau is specifiek voor de gameswereld. Daarvoor heb ik industrieel ontwerpen gestudeerd in Delft. In 2000 ging ik werken voor Lost Boys, dat was toen het hipste internetbureau. En daar ontwikkelde ik tot de commerciële verantwoordelijke. Na 2 andere kleine baantjes ben ik aanraking gekomen met de games wereld. Toen dacht ik: in die branche wil ik werken. Maar daar mistte wat data voor de komst van mobiel en alles wat er stond te gebeuren voor de games wereld. Toen dacht ik, ik ga een bedrijf starten die dat gaat oplossen.

Nils: Wat voor klanten heeft uw bedrijf vooral?

Peter: Onze voornaamste klanten bestaan echt uit gamebedrijven. Die splitsen zich op in de traditionele gamewereld, zoals Microsoft en Sony. Microsoft is onze grootste klant. Alle jongens die er al wat langer inzitten. En dan heb je de nieuwkomers en de online game en mobiele game partijen, dan heb je het over Riot Games, van League of Legends of Valve van Steam. Deze groep is het moeilijkste te bedienen, maar daar leer je ook veel van. Hardware is een derde groep klanten, Intel, Nvidea maar ook iedereen die een keyboard maakt of headset. En meer recentelijk zijn het mediabedrijven, zoals Twitch, Facebook, Youtube, Amazone etc.

Nils: Waarom is Sony geen grote klant?

Peter: Ik denk om dezelfde reden dat Nintendo geen klant is. Dat is de combinatie van traditioneel en Japans, dat past ons niet zo. Dat komt omdat ze nieuwe trends te laat zien, en wij zitten altijd op de nieuwste trends. En hun hiërarchie in het bedrijf, daar is het heel lastig om zaken mee te doen. We vinden het ook niet erg. We zouden ze graag erbij hebben, maar we hebben genoeg klanten.

Nils: Ik ben momenteel aan het kijken wat voor segmenten er binnen de gamewereld zijn, er zijn natuurlijk veel verschillende groepen onder de gamers zelf. Zou u misschien een indicatie kunnen geven van wat voor segmenten geïdentificeerd kunnen worden op de Nederlandse markt?

Peter: Je raakt een beetje aan de reden van ons bestaan. De markt is zodanig veranderd in de afgelopen 10 jaar, dat het indelen in segmenten heel moeilijk is geworden. Het is daarom ook lastig daar een eenzijdig antwoord op te geven. Het games vakgebied bestond uit heel veel jargon. Dat is allemaal overboord, maar wij als onderzoekspartij hebben wel segmentatie nodig, want je moet dingen kunnen beschrijven. Wij hebben een alternatieve segmentatie gekoppeld aan de oude die voor altijd blijft werken. Je hebt de traditionele opdeling, die voor een groot deel nog opgaat. Je hebt console games, gespeeld op de TV en je hebt handheld. Je hebt smartphone en tablet, en je hebt aan de PC-kant casual webgames en PC gaming. Dus in principe zien we op zijn meest uitgebreidst ongeveer 7 segmenten. Wij moeten dit nog zo segmenteren zodat mensen het begrijpen vanuit het oude perspectief op de markt, maar wij doen ook projecties naar de toekomst. Als al die segmenten door elkaar gaan lopen kan je de toekomst niet voorspellen, dus wat is een eenvoudiger model om te gebruiken? Dat is het schermmodel, wat wij geïntroduceerd hebben in 2012. Tot de tijd dat augmented reality plaatsvindt, vindt interactie met content plaats door schermen. De typische Westerse consument heeft 4 typen schermen om zich heen. Dat zijn de TV, de lean forward scherm (PC), de smartphone (personal screen) en de floating screen (vult de gaten tussen andere schermen, tablet). Als je in onze theorie gelooft, gaat het gebruik van al deze schermen de komende jaren met 25% toenemen. Dus de nieuwe segmentatie zal meer bestaan uit een scherm en een genre game. Hiermee hou je ook rekening met anderen die games leveren voor de TV, niet alleen Sony en Microsoft. Deze nieuwe indeling wordt steeds meer gebruikt.

Nils: De groei die we net zagen was voor de Amerikaanse markt, hoe zit het nou op de Nederlandse markt?

Peter: Vroeger had je de casual gamer, dat was de vrouw. En je had de jonge man, die speelde echt games op de TV. Het type gamer was eigenlijk wel gekoppeld aan een scherm. Met de komst van mobiel is dat vloeibaar geworden. Ongeveer 30% van alle Nederlandse gamers speelt op alle vier de schermen. Het type gamer hangt meer samen met genres en ervaringen, onafhankelijk van het scherm waarop hij speelt. Je hebt nog steeds voornamelijk de mannelijke gamer (70% in Nederland) die veel tijd erin stopt en veel geld uitgeeft aan gaming. Nederland is wat dat betreft nog best traditioneel, want het merendeel van dat geld gaat via consoles.

Nils: En heeft u een indicatie of een percentage van hoeveel er daadwerkelijk naar consoles gaat in Nederland? Hoeveel console gaming inneemt op de Nederlandse markt?

Peter: In Nederland is volgens onze data in 2014 in dollars 430.000.000 uitgegeven vorig jaar, ongeveer 32.000.000 aan Facebook games, 73.000.000 aan smartphone, 42.000.000 aan tablet, 40.000.000 aan MMO, 32.000.000 voor steam-achtige clients, 210.000.000 aan consoles (waarvan 15.000.000 voor handhelds).

Nils: Als we kijken naar alle segmenten die zojuist genoemd zijn, welke van deze segmenten zijn belangrijk voor Sony en Microsoft? Zij hebben natuurlijk hun consoles, betekend dit dan meteen dat de entertainment screens de belangrijkste zijn? Wie willen ze bereiken denkt u?

Peter: Terwijl ze onderling bezig zijn met de slag om de TV, want ze domineren samen gamen op TV, kijken ze wel naar andere schermen. Een van de reden is dat ze weten dat gamers die bij hun geld uitgeven op TV ook geld uitgeven op de andere schermen. Dus mensen die ze nu al entertainen is maar een deel van hun budget, terwijl ze vroeger nagenoeg 100% pakte. Microsoft ziet de oplossing in het streamen van Xbox games naar PC. Met Windows 10 wordt de Xbox App geïntergreerd. Ze willen dus ook naar PC. Microsoft wil ook graag naar mobiel, maar dat is eigenlijk een andere tak van Microsoft. Dat komt omdat alle casual gamers zijn weggezogen door mobiel, dus alles op consoles en PC is nu eigenlijk voor core gamers. Ze kijken er vanuit een bedrijfsmatig standpunt wel naar, maar het is vaak niet direct de verantwoordelijkheid van de bestaande gameorganisatie.

Nils: Dus wat je eigenlijk ziet is dat met de nieuwe consoles meer wordt gericht op de echte core gamers, in plaats van de casuals.

Peter: Ja, en dat is enerzijds noodgedwongen vanwege het weglopen van casual gamers naar mobile en anderzijds omdat de core gamer het meeste geld uitgeeft.

Nils: En hoe ziet de core gamer er gemiddeld uit?

Peter: Over het algemeen is de helft tussen de 21 en de 35, 70% is man, 30% vrouw. Het aantal vrouwen is wat gestegen de laatste jaren.

Nils: Zie je ook verandering in de marketing van bedrijven, aangezien er nu meer vrouwelijke gamers zijn? Of blijft het toch meer gericht op het mannelijke segment?

Peter: Qua directe targeting zullen ze vast ook wel de vrouwen aanspreken, maar in hun uitingen durven ze niet iets vrouwelijks te doen of aan te passen. Als een doelgroep gevoelig is voor wat ‘cool’ is, dan zijn het wel gamers. En de vrouwelijke kant wordt ook liever benaderd als core gamer, niet als vrouw.

Nils: Op basis waarvan denkt u dat Sony en Microsoft segmenteren? Denkt u aan demografisch of geografisch.

Peter: Zij hebben een hele specifieke segmentatie die heel diep gaat. Nou moet ik eerlijk zeggen dat ik er lang niet bij betrokken ben geweest. Het gaat in ieder geval om harde en zachte variabelen. Het gaat om harde variabelen als tijdsbesteding aan games en genres en geld. En zachte variabelen als welke rol games spelen in je leven en wat je digitale lifestyle is. Bijvoorbeeld of je een early adapter bent en of je actief bezig bent in je vriendengroep of op social media. Ze zoeken echt diegene die dat doen. Op strategisch niveau hebben ze segmenten die over de schermen heenlopen, want op lange termijn willen ze ook op andere schermen actief worden.

Nils: Ik zie nog dingen staan zoals gender en age, dus daar wordt wel naar gekeken?

Peter: Ja, er wordt vooral gekeken naar leeftijd in combinatie met levenssituatie, gezinssituatie.

Nils: Dus dat is eigenlijk samen te voegen tot psychografische segmentatie, om het maar even samen te voegen.

Peter: Ja, dat klopt

Nils: Op wat voor manier proberen Sony en Microsoft de nieuwe consoles te positioneren? We hadden het net al een beetje over core gaming bijvoorbeeld.

Peter: Wij krijgen onwijs veel vragen van de pers over consoles vanuit Amerika.Wij hebben hier een vragenlijst van Microsoft waarmee ze vragen stellen aan hun exacte doelgroepen. Je ziet al meteen dat het gaat over familie bijvoorbeeld. *Overgang naar volgend onderwerp* Er wordt heel veel gefocust op de nieuwe consoles. We weten dat van de oude generatie zo'n 80.000.000 zijn verkocht. Nou is de hele Amerikaanse pers gefocust op verkoopcijfers, maar er zijn grotere factoren dan verkoopcijfers. Uiteindelijk heeft de wereld behoefte aan twee gelijkwaardige consoles. Bovendien heeft 40% van alle console eigenaren ze allebei. Uiteindelijk denk ik dat ze beiden ook 80.000.000 gaan verkopen, de 'race' is een irrelevante discussie. Maar waarom start de Xbox one nou langzamer dan de PlayStation 4? Dat komt omdat de waarde die de Xbox 360 heeft, hoger is dan de PlayStation 3. Het verschil om over te stappen naar de One is kleiner dan het overstappen naar de PlayStation 4, omdat echt alle titles nog op de 360 werden gelanceerd. Je moet het succes van de bedrijven meten aan hoeveel mensen op de 360 OF One spelen en hoeveel mensen op de 3 OF de 4 spelen. We zitten nu in een overgangsfase waarin net zoveel games verkocht worden op de 360 als op de One. Wat is het doel van hun console, 1 ze willen geld verdienen aan alle soorten content erop zoals muziek en video. En ze willen allemaal naar China en over verschillende schermen actief worden.

Nils: Dus ze worden wellicht wat meer gepositioneerd als een soort multimedia-apparaat in plaats van een console? Want ze kunnen veel meer dan alleen games afspelen tegenwoordig.

Peter: Ja, en daar zit een grote marketing uitdaging voor hun, aangezien de console door het overstappen van casual gamers naar mobiel meer voor de core gamer is geworden, maar het uitbreiden van je diensten en een media-apparaat zijn lijkt meer een familie-achtige boodschap en is niet zo cool.

Nils: Dus je krijgt ietwat tegenstrijdige boodschappen.

Peter: Dat is het gevaar. En dat zag je ook toen Microsoft tijdens E3 bijna heel zijn presentatie over media features liet gaan en core gamers dachten “what the f*ck.”
Daar heb ik heel erg van geleerd. Ik denk dat ze allebei geleerd hebben dat de belangrijkste groep de core gamers zijn, en dan maar hopen dat ze ook geld uitgeven aan de andere content die ze hebben. Ook belangrijk, de core gamers bepalen wat wordt aangeschaft in een gezin. Onderschat nooit de kracht van een 16 of 18-jarige thuis met ouders van 50 over de beslissingen qua internetprovider of iets dergelijks. Daarnaast moet ik wel zeggen dat ik het onzin vindt om bijvoorbeeld alle TV-kanalen op een console te krijgen, dat is zo lokaal daar wordt je nooit zo compleet in als anderen. Je moet je richten op apps als Netflix, iets wat je iedereen kunt bieden.

Nils: Zoals ik in het begin al zei, mijn onderzoek richt zich voornamelijk op de strategieën gebaseerd op de market stimuli, zoals prijs, promotie, product en plaats. Met betrekking tot de productstrategie, wat zijn volgens u de belangrijkste kenmerken van de nieuwe consoles? Wat proberen ze met deze nieuwe consoles te doen?

Peter: Toegang tot de coolste content die er is bieden. Het gaat om de content die je kan krijgen via hun, en de hardware helpt een beetje om de ervaring te maximaliseren. Maar wat ze verkopen is gewoon de coolste high-end media ervaring, soms beter dan PC. Ze kunnen op een groot scherm, ze hebben games die niemand anders heeft, en dus een beetje voorkomen als media-apparaat. Je kan de strategie van Sony en Microsoft niet los zien van de content die ze bieden. Ze besteden heel veel geld aan games exclusief houden. Ze investeren heel veel in het kopen van studio’s om games exclusief te houden. Hetgeen waar ze het meest mee concurreren zijn de games die ze kunnen bieden. Daarnaast is er een prijsverschil wat volgens de Amerikanen een grote invloed heeft, maar ik denk dat het weinig invloed heeft. Dat het in het eerste jaar van lanceren geen enkele invloed heeft, want iedereen die core games speelt koopt dat ding toch wel. Het is pas bij later dat je terug moet zakken met prijs.

Nils: Als we nou kijken naar de vorige generatie, hoe zijn deze nieuwe apparaten veranderd ten opzichte van de oude consoles? Wat maakt ze uniek?

Peter: Het verschil tussen elke generatie wordt relatief kleiner. Er is geen grote sprong meer in ervaring of functionaliteit zoals die er was tussen bijvoorbeeld de PlayStation 2 en de 3. Dat was echt een wereld van verschil. Nu is het een veel rustigere overgang. Het biedt je voor de komende jaren ook de meest coole en nieuwste ervaring, dus je moet langzamerhand gaan overstappen. Je wilt jezelf verzekeren van de rijkste ervaring. Ik denk dat er ook veel mensen zijn die simpelweg het nieuwste willen hebben. De eerste groep die die apparaten kopen hebben andere criteria, soms geen rationele criteria om zo’n ding te kopen. Die willen hem gewoon.

Nils: Dus de early adapters, of de innovators die kopen eerst, en vervolgens zakt het langzaam terug naar de mensen die meer denken “het nu wel eens tijd.”

Peter: Ja, dat klopt. Dat zijn vaak mensen die iets minder vaak gamen. Ik ben nu zelf ook wat ouder en heb kinderen, dus ik zit in de wat latere groep. Echt qua features, kopen mensen een Xbox One omdat je er echt wat anders mee kan? Dat betwijfel ik. Je hebt wel meer social features wat mensen leuk vinden.

Nils: Is dit belangrijk voor de core gamers? Al die social features die je hebt op de Xbox One maar niet op de Ps4?

Peter: Ik ben niet heel erg op de hoogte van alle verschillen.

Nils: We hadden het net bijvoorbeeld over de core gamer, maar kennelijk hebben deze features toch een vorm van waarde voor deze doelgroep. Maar hoe groot is deze waarde, want uiteindelijk willen de core gamers maar één ding: gamen.

Peter: Ik denk dat de waarde van die social features wel heel erg laag zijn. Het gaat erom of jij Halo wilt spelen of niet, daar moet je die console voor hebben. Het wordt wel gebruikt als excuus naar ouders toe. Bijvoorbeeld dat de console nodig is, want dan kunnen de ouders Netflix kijken. Het helpt gamers het te onderbouwen naar ouders toe. Misschien dat mensen het wel cool vinden dat ze kunnen streamen via Twitch. Apps die dingen in-game doen zijn misschien wel cool, maar die toeters en bellen eromheen hebben minder waarde.

Nils: U had het er net over dat de core gamers beide consoles kopen. Maar toch is er nog steeds een vrij felle strijd tussen de consoles. Daar is dus toch iets van loyalty aanwezig.

Peter: Ja, de meeste mensen hebben toch wel duidelijk een voorkeur. Ook al hebben ze er twee, dat is in Nederland misschien maar 30% of een kwart, maar er is zeker wel een soort van loyaliteit voor de merken. En of dat loyalty is naar de consoles of naar de beschikbare franchises, dat is een beetje de vraag.

Nils: Dan kom je dus eigenlijk weer terug op het verhaal dat ze concurreren op exclusieve games.

Peter: Ik zal even kijken hoe ze het in Nederland doen. Er zijn mensen die de console gebruiken en zich eigenaar voelen en een aantal aanwezige consoles in Nederland, dat zijn twee verschillende dingen. Dat is meestal tussen factor 1,5 en 2. In een gezin heb je meer mensen en de buurjongen heeft niks maar speelt altijd bij ons bijvoorbeeld. Als het gaat om Nederland, dan schatten wij in dat er ongeveer 585.000 mensen zijn die Xbox 360 spelen en 195.000 Xbox One. Ongeveer 850.000 Nederlanders spelen PlayStation 3 en 535.000 spelen PlayStation 4, wat extreem hoog is. Het lijkt erop dat Xbox One, ook vanwege de verlate lancering, echt een onwijze achterstand heeft opgelopen.

Nils: Ook bij de PlayStation 3 en de Xbox 360 zie je dus al een vrij groot verschil.

Peter: Ja, je hebt per land altijd een merkvoorkeur en Nederland is iets meer gericht op PlayStation. Ik zal even voor je kijken wat de crossover tussen consoles. Er zijn momenteel ongeveer 50.000 mensen die allebei de consoles gebruiken.

Nils: Die overlap valt dus nog best mee. Dus in Nederland is er dan toch duidelijk een voorkeur voor PlayStation, als je uitgaat van de gebruikersaantallen. En als we nou even terugkijken naar loyaliteit, wat bieden Sony en Microsoft met de nieuwe consoles voor loyale klanten en/of nieuwkomers?

Peter: Ze proberen met dingen als je account of gamertag je steeds opnieuw te benaderen. Ze dwingen je eigenlijk om een Xbox Live abonnement te kopen. Daarvoor blijf je er wel bij. Maar ik vind ze heel zwak op dat vlak, zeker als je dat vergelijkt met andere dingen als online of mobiele games.

Nils: Bijvoorbeeld geen bonussen voor mensen die de PlayStation 3 hadden en de 4 kopen? Of voor de Xbox in dat opzicht?

Peter: Nee, niet heel actief. Op mobiel heb je bijvoorbeeld al drie dagen niet gespeeld en dan krijg je een melding van het spel dat je punten hebt opgebouwd. Dat doen de consoles niet.

Nils: Kunt u misschien wat vertellen over toekomststrategieën van de bedrijven? Wat moeten ze veranderen in de toekomst? Welke trends moeten ze op inspelen?

Peter: De bedrijven maken allebei een grote fout. Ze zien trends als ‘tech’ en ze denken wij moeten met de nieuwe trends mee, dus doen we 3D-TV, we doen Kinect, we doen Virtual Reality, alleen de trends die de wereld aan het veranderen zijn zijn helemaal geen tech trends. Het zijn trends van consumentengedrag. Het consumentengedrag is heel erg veranderd door de komst van mobiele platforms. En virtual reality bijvoorbeeld, dat interesseert mij geen hol. Het zal een paar miljard verdienen en het is een leuke gadget. Misschien heeft 1 van de 10 vrienden zo’n ding en ga je er een paar keer mee spelen. Google investeert in VR omdat op een gegeven moment de schermen verdwijnen en dan gaan mensen interactie met content hebben en communiceren zonder fysiek scherm. Daarom investeren ze nu, ze willen niet te laat zijn. In de tussentijd kan je er allerlei leuke dingen mee doen, maar het is een gadget, slechts een leuk speeltje.

Nils: Het is eigenlijk meer een gimmick?

Peter: Een gimmick, gewoon leuk en cool. Zo blijf je voorop lopen. De trends die de wereld echt veranderen zijn de beweging naar digitale distributie, consumenten die de baas zijn en mee willen beslissen in het creëren van content, dat is bijvoorbeeld het succes van Minecraft. Het succes van Twitch, dat is create en share. Als jouw platform creëren en delen niet faciliteert, dan ben je f*cked. Dan zit je in een hele kleine niche van hele unieke ervaringen, maar ben je niet echt onderdeel van de consumententrend. En heel praktisch gezien, we weten dat op een gegeven moment de boxed games gaan vervallen zoals de CD’s dat nu doen, maar dat proces wordt kunstmatig vertraagt door de afspraken die Sony en Microsoft maken met de publishers en de winkels. Want probeer nu maar eens FiFa 15 te kopen, die kost nog 50 euro in de PlayStation store, terwijl als je op het internet zoekt je hem voor 25 euro naar je huis kan laten verzenden. Dus het is goedkoper een fysieke versie aan te schaffen. Zolang Sony en Microsoft dat faciliteren, kunstmatige prijsbeïnvloeding, gaan anderen hen voorbij de komende jaren. Ze gaan niet mee met de consumententrends, ze beseffen het belang niet van involvement en sharing. En ze moeten mee in de beweging, waarmee publishers ook digitaal de prijs aan kunnen passen.

Nils: Dus dat is dan eigenlijk de prijsstrategie die zou moeten worden aangepast aan de moderne wereld.

Peter: Ja, consoles zijn nog steeds uitzonderlijke gevallen als het neerkomt op businessmodel en distributie. PC is volledig digitaal geworden, mobiel is sowieso digitaal. De meerderheid van het geld van de PC gaat naar betaald ingame. Hoe langer ze wachten, hoe groter dat verschil wordt en hoe sneller iemand ze voorbij snelt zoals Nvidia met hun nieuwe shield consoles.

Nils: Dus wat ze zouden moeten doen in de toekomst is de console digitaliseren?

Peter: Ja, en openstellen. Laat de developer zelf de prijs bepalen, ga er niet tussen zitten. Want games zijn tegenwoordig een dienst, geen product.

Nils: Dan resteert nog de distributiestrategie, dat is er eentje die ik wel belangrijk vind. Want u zei net ook al, de Xbox One kwam later uit in Nederland dan de PlayStation 4. Daar zat best een groot gat tussen. Wat voor invloed heeft dit gehad? Had dit grote invloed, of hebben loyale klanten hem gewoon ergens anders vandaan gehaald?

Peter: Er zat wel een groot gat tussen, dus het zal zeker invloed hebben gehad. Het heeft ook imagoschade voor Xbox opgeleverd. Het is alsof ze Nederland niet serieus hebben genomen, alsof ze een rangschikking hebben gemaakt qua landen. Misschien dat het niet anders kon, maar dat er bijna een jaar tussen zit daar lijd je simpelweg imagoschade mee, dat heeft invloed op de verkoop. Zelfs de Mediamarkt had geïmporteerde Xboxen liggen, zo lang duurde het. Dat is denk ik een grotere flater geweest dan Xbox dacht op dat moment.

Nils: Okay, dus dat heeft wel degelijk invloed gehad. Eigenlijk heel veel invloed, zeker voor Nederland.

Peter: Even terugkomend op die innovatie, ik denk dat ze ook oude games gaan aanbieden via betaalde streamingdiensten. Dat wordt een nieuw businessmodel. De functionaliteiten van PC naar console en vice versa verbeteren. En wat ik vooral vind is dat ze vergeten te innoveren in businessmodellen en de prijsstrategieën van games. En ook het openstellen van developers. Je moet tegenwoordig nog steeds 10.000 dollars neerleggen om een developer te kunnen zijn bij Xbox of PlayStation, het zijn geen open platforms.

Nils: Je ziet momenteel wel meer ondersteuning van bijvoorbeeld Indiegames. Die geven ze wat meer toegankelijkheid.

Peter: Daar zijn ze inderdaad wel iets beter in geworden, dat is erg belangrijk.

Nils: Okay, dan nu de laatste vraag. Op basis waarvan denkt u dat Sony en Microsoft gekozen hebben voor de prijzen 500 en 400 euro? Heeft u het idee dat dit invloed gehad heeft op het koopgedrag van gamers?

Peter: Ik vind dat heel interessant. PlayStation dacht "wij gaan wat eerder de markt op, dit is onze kans om marktaandeel te winnen," dat hebben ze letterlijk zo gezien. Vervolgens gooide ze er een schepje bovenop door niet alleen eerder te zijn, maar ook goedkoper. Microsoft had exact de andere gedachte. Die dachten, zoals ik daarstraks ook zei, het maakt in het begin allemaal niet zo uit, want de echte mensen willen hem toch wel. Dat was wellicht wat arrogant van Microsoft. Als ik zo terugkijk denk ik wel dat PlayStation er slimmer mee is omgegaan. Ik ben er nog steeds van overtuigd dat er uiteindelijk van beide consoles 80.000.000 verkocht gaan worden, alleen het duurt wel, door meerdere factoren, een stuk langer. Ze gaven Sony de kans om serieus marktaandeel te winnen. Dat zal uiteindelijk slijten, maar als ik nu de cijfers zie had ik verwacht dat Xbox wat sneller zou terugkomen.

Nils: Dus eigenlijk heeft Microsoft, om het maar even zwart-wit te zeggen, de loyaliteit van de Nederlandse gamers overschat. Want ze zijn massaal overgestapt of hebben geen Xbox One gekocht.

Peter: Ja, ze hebben misschien een hele positieve ervaring met de PlayStation 4 en wilde ze ook de Xbox One, maar denken ze nu mwah, het is niet meer nodig. Dus ze hebben Sony de kans gegeven om loyalty te creëren voor de PlayStation 4. Voornamelijk de combinatie van het te laat uitbrengen, de flaters in de pers en de hogere prijs heeft gezorgd voor deze situatie.

Appendix IV – transcript of interview, Bart Hufen (Dutch)

Interview 2: Bart Hufen, Brand New Game

Nils: Zou u zich even kort kunnen voorstellen en uitleggen wat u doet?

Bart: Bart Hufen, ik bedenk spelconcepten voor bedrijven om personeel te trainen over het algemeen, of om andere vraagstukken in beweging te brengen. En ik heb een achtergrond in technische bedrijfskunde en brand management. Als productmanager ooit gewerkt bij Atari en nu al zes jaar zelfstandig in B.V. vorm met een collega.

Nils: Zoals ik net al zei, mijn onderzoek gaat over Sony en Microsoft en hoe zij de klanten beïnvloeden. Mij eerste vraag heeft betrekking tot de segmentatie van de bedrijven. Als we kijken naar de Nederlandse gamersmarkt, wat voor segmenten zijn daarin te onderscheiden?

Bart: Als je dat nog steeds in leeftijd categoriseert zullen dat toch de wat jongere mensen zijn. Tegenwoordig beginnen gamers segmenten al vanaf 3 jaar of 2 jaar zelfs met de applicaties. Qua doelgroepen is het dus moeilijk om te zeggen, maar je ziet tegenwoordig wel dat de jongste mensen tegenwoordig al gamen. Ik denk dat Xbox zich voornamelijk richt op de wat oudere gamer vanaf 25+, en de PlayStation juist weer een beetje richt op 15 tot 40 ongeveer. Toch blijft het moeilijk om de segmentatie te identificeren, want de vraag is “waarop ga je segmenteren?” en “kun je wel segmenteren?” Je kunt bijvoorbeeld niet zeggen dat mannen van rond de 30 een bepaalde game spelen, want ik speel ook Call of Duty met jochies van 14 online. Daarnaast ken ik volwassen mannen die Candy Crush spelen, terwijl je zou denken dat het voor kinderen is.

Nils: U haakte al een beetje in op mijn volgende vraag, namelijk welke segmenten zijn belangrijk voor Sony en Microsoft. Voor Sony zouden dat dus de gamers tussen 15 en 40 jaar zijn, en voor Microsoft de wat oudere gamers?

Bart: Ja, ik denk dat Sony een breder publiek kan aanspreken door toch te kiezen voor een middenmoot positionering. Ik denk ook dat ze iets meer lovability hebben dan Microsoft. Microsoft blijft toch een beetje die grote, boze reus die ook in de Windows software zit. In Nederland denk ik dat PlayStation een betere positie heeft.

Nils: De volgende vraag luidt: op basis waarvan segmenteren Sony en Microsoft? Dat was een wat lastigere vraag.

Bart: Dat zou je inderdaad echt aan de bedrijven zelf moeten vragen, of analyseren vanuit hun aanbod. Want dat zie je aan de websites denk ik ook wel, waar ze zich op richten. Als je kijkt naar soort games is het nog steeds klassiek zo, dat PlayStation echt de middenmoot pakt en Microsoft toch meer de core gamer, die volwassener en nerdier is. Je ziet toch dat Microsoft meer een tech-brand is en Sony meer een lifestyle brand. Dat heeft Sony ook altijd geprobeerd te zijn. PlayStation is om de een of andere reden altijd wat hipper gebleven.

Nils: Maar er wordt dus nog wel gekeken naar dingen als demografische factoren als leeftijd, levensstijl etc. en PlayStation richt zich als lifestyle brand dus op psychografische factoren om het zo maar te noemen.

Bart: Ja, want zoals ik al zei, ik denk niet dat je kunt segmenteren op leeftijd in games. Dat kon 20 jaar geleden misschien wel, maar tegenwoordig gamed iedereen. Mijn moeder zit WordFeud te spelen met mijn zusje bijvoorbeeld. Je kunt dus zeker niet demografisch en op sekse segmenteren, maar wat je wel kunt doen is segmenteren op play mechanics of op lifestyle choices en persona's. Persona's geloof ik zelf alleen niet zo in, want ik geloof zelf dat de context van invloed is op wat ik speel of wanneer ik het spel. Want ik ben nu degene die wordt geïnterviewd, maar morgen ben ik iemand die interviewt, dus je hebt zo veel rollen in je leven. Dus de context bepaald wat ik ga spelen. Stel dat ik op de bank zit en er komen wat vrienden langs en eentje wil een voetbalgame spelen, dan gaan we dat doen. Terwijl ik normaal zelf nooit voetbal zou spelen.

Nils: Duidelijk. Dan de volgende vraag, op wat voor manier proberen Sony en Microsoft de nieuwe consoles te positioneren? U had in uw boek een soort positioneringsmap gemaakt over hoe consoles in de markt staan. Hoe zit het met deze nieuwe generatie?

Bart: Het is duidelijk dat de Xbox destijds van plan was om de woonkamer te claimen. Dat was ooit al de visie van Bill Gates, om te zeggen dat de meterkast vervangen gaat worden door een PC. Ik denk dat het de Xbox niet is gelukt om dit te bereiken terwijl het de PlayStation wel is gelukt, ondanks dat de PlayStation het niet zo hard heeft geschreeuwd. Ik kijk zelf bijvoorbeeld Netflix via mijn PlayStation en dat hoor ik ook veel om mij heen. Ik hoor maar weinig mensen zeggen dat ze hun Xbox gebruiken als een mediacentrum.

Nils: Dat is toch wel apart, want dat was eigenlijk wat ze wilde zijn.

Bart: Ja precies, maar ik he toch het idee dat het gewoon niet van de grond gekomen is. En misschien komt het ook wel omdat Sony altijd een lifestyle brand is geweest. Ze hadden natuurlijk Sony Pictures, Sony Music en Sony PlayStation. Ze hadden alles in huis. Eigenlijk hadden ze de

Spotify van de wereld moeten worden of de Itunes. En Microsoft blijft toch een tech-company die heeft geen content, die hebben die strings niet met andere bedrijven.

Nils: Mijn onderzoek richt zich op de marketingstrategieën, en dan voornamelijk op de marketing stimuli. Dan krijg je dus eigenlijk de standaard marketing mix met prijs, plaats, product en promotie. Kijkend naar de productstrategie, wat zijn de belangrijkste kenmerken van de nieuwe consoles ten opzichte van de oude?

Bart: Ik weet het vooral van PlayStation. Interessante features vond ik toen dat ze koppelingen hadden met Facebook en dat het mogelijk is om content te streamen van je PC. Maar de meest interessant features vond ik de sharability en vooral ook het feit dat je een screenshot kan maken. Sony heeft bedacht dat je niet alleen een screenshot kan maken, maar ook een filmpje. Alleen vind ik het een beetje slecht uitgevoerd. Als je bijvoorbeeld een mooi moment in een game hebt kan het zijn dat je alleen de laatste 10 seconden wilt, dat hadden ze moeten doen. In plaats daarvan heb je een video-editor waarmee je na het spelen de video kan aanpassen. Dat vind ik omslachtig, maar de connectivity is een slimme keuze geweest. Ik denk dat Microsoft daar toch een achterstand in heeft. Het is een beetje vergelijkbaar met Google, die proberen ook Google Hangouts, maar niemand gebruikt het. Soms kun je roepen dat je iets wilt zijn, maar je bent het gewoon niet.

Nils: Als we nou kijken naar de grote verschillen ten opzichte van de vorige generatie, wat voor stappen zijn er dan gemaakt?

Bart: Wat ik eigenlijk had verwacht van de PlayStation 4 was dat er helemaal geen CD-slot meer in zou zitten of een DVD-slot.

Nils: Was dat bij Xbox niet het geval? Dat er geen CD-drive meer in zou zitten?

Bart: Ja, ze wilde het eruit laten, maar niemand durfde het uiteindelijk. Ik denk ook om de retailer niet te by-passen, je moet niet vergeten dat, afgezien van Free Record Shop die al omgevallen is, er nog steeds veel verkopen zijn in de winkel. Maar ik had toch verwacht dat er geen CD-drive in zou zitten. Een ander verschil is het zich openstellen voor developers. Het waren hele gesloten systemen en alleen bereikbaar voor grote publishers en developers. En nu zie je eigenlijk dat iedere leek een game kan maken en uploaden.

Nils: Een beetje de Indiegame industrie.

Bart: Ja, die Indiescene is natuurlijk heel groot geworden. Ze hebben goed gekeken naar Valve van Steam. Dat is een serieuze concurrent voor ze. Steam komt nu ook met een eigen console, maar die prijzen zijn belachelijk voor wat je krijgt. Natuurlijk zou ik graag mijn PlayStation op kunnen pakken en dezelfde games spelen die ik ook op Steam heb, dat zie ik nog wel gebeuren.

Nils: En wat bieden de bedrijven nu voor bestaande klanten en nieuwkomers, bijvoorbeeld om mensen uit te nodigen de nieuwe consoles te kopen.

Bart: Zeker PlayStation doet er wel veel aan volgens mij, ook met reclames op televisie. Ik neem aan dat Xbox dat ook nog steeds doet, maar ik heb er geen idee van.

Nils: Xbox zie ik zelf op de TV nauwelijks adverteren. PlayStation een stuk meer, vooral met Bloodborne.

Bart: Dat is voor Microsoft ook een gemis, je moet er natuurlijk wel zijn. Sony heeft op Facebook ook veel meer likes, dus die hebben klaarblijkelijk de social media beter op orde. Ik denk dat het tegenwoordig ook niet meer de vraag is of je een console in huis neemt, maar welke. En als je jong bent krijg je of een Ipad of een Nintendo, daar zijn toch wat meer verantwoorde games op. Maar goed, zodra een jochie 10 wordt wil hij of een PlayStation of Xbox en wordt het 1 van de 2. Dus wellicht is het ook niet meer nodig om heel hard te adverteren, want tegenwoordig is het bijna de norm. Papa koopt toch wel een console voor het gezin. Het gaat nu eigenlijk alleen maar om de herhalingsaankoop.

Nils: Dat gaat eigenlijk door naar mijn volgende vraag, wat voor promotie gebruiken Sony en Microsoft voor hun consoles. Sony doet dat dus op TV en op billboards. Ik heb wel eens billboards gezien van de Sony Xperia die samengaat met de PlayStation 4. Maar Microsoft, hoe promoten zij het?

Bart: Ja, dat vraag ik me dus af. Ik heb echt geen idee, ik zie ze nergens terug. Dat kan ook door mijn merkvoorkeur komen, dat ik afgeschermd ben van Microsoft.

Nils: Ikzelf volg beide consoles online, maar bij mij komen ook nauwelijks Xbox reclames omhoog. Bij banners niet op websites, of klikadvertenties. Dus ik vraag mij dan af hoe ze zichzelf promoten.

Bart: Ik heb ook het idee dat PlayStation meevaart op het succes van goede games, zoals Bloodborne. Ik heb het idee dat Xbox gewoon minder blockbusters heeft om mee te adverteren.

Nils: Dus eigenlijk is promotie via de exclusive titels wellicht belangrijker dan het promoten van de console zelf.

Bart: Daarnaast denk ik ook dat Sony veel meer met de poten in de klei is gaan staan, die hebben een stukje nederigheid gekozen 2 jaar terug. Ik was toen op de E3 in Amerika en toen merkte al bij de aankondiging van de PlayStation dat als je zag hoeveel independent developers mochten publishen voor hen, dat was enorm. Als alleen al vergeleek hoeveel Sony er had en hoeveel Microsoft er had. Xbox zat met vijf grote publishers te schermen, terwijl PlayStation zei kijk eens, we hebben ons opengesteld. Ik denk dat PlayStation de community veel meer achter zich heeft staan. De developers kit voor PlayStation is denk ik simpeler.

Nils: Je kunt je ook afvragen of dat is wat de community wilt. Willen console gamers indiegames op de systemen?

Bart: Dat weet ik niet, ik ben er zelf niet zo van. Zelf speel ik voornamelijk PC-games, maar als ik PlayStation speel dan zijn het inderdaad vooral meer de story-driven games. Ik denk dat het voordeel van Sony is, dat ze met de indiegames niet alleen de core gamers pakken, maar ook ouders met kinderen die normaal naar Nintendo zouden gaan. Die kunnen bij Sony nu ook vinden wat ze willen. En als je de cijfers goed analyseert van Newzoo dan zie je dat duidelijk terug. Nintendo is fors gedaald, met ongeveer 10% in omzet en winst terwijl PlayStation een kwart omhoog is gegaan. En Xbox is ongeveer gelijk gebleven. Dan kan je dus genoeg concluderen. Een groot verschil wat ik net nog vergat te noemen tussen de vorige generatie en nu, is dat Sony Playstation Home offline heeft gehaald. Home is een prachtige misser geweest van Sony. Ik denk dat als ze gewoon een virtuele wereld zouden maken waar je bijvoorbeeld ook Sony persconferenties live kan bijwonen, dat het dan wel zou werken.

Nils: Dan weer even terug naar de promotie, hebben Sony of Microsoft advertenties gemaakt die specifiek voor Nederland gemaakt zijn. Differentiëren zij in hun promotie, of is het overal hetzelfde?

Bart: Een beetje, maar niet veel. Ik heb een tijdje de brand manager gekend van PlayStation en ik weet dat ze wel eens lokale dingen deden. Dingen zoals lokale bundels of acties met retailers als Bart Smit. Wat ze ook wel goed deden vaak was een epische titel zoals Assassins’ Creed bundelen met de nieuwe PlayStation 4, of dat je bij een PlayStation 4 drie gratis games kreeg. En dat doet Xbox volgens mij ook gewoon.

Nils: En als we kijken naar de promotie van de vorige generatie, zijn er dan duidelijke verschillen te zien?

Bart: Ja dat denk ik wel, maar dat komt door een aantal dingen. Een reden is dat Steve Ballmer is afgetreden, dat heeft denk ik toch effect gehad. Die vent is toch 2 jaar geleden gestopt, misschien wel de grootste gefaalde werknemer van Microsoft. Ik heb de oorspronkelijke Xbox launch nog meegemaakt. Toen kwam de Xbox 360. En die 360,daarbij geloofde ze gewoon in de markt, die was enorm aan het groeien. Dus toen hebben ze nog echt aandeel kunnen verwerven. Maar toen rond 2010 was er ineens smartphone gaming. Gaming was niet meer voor de nerds, maar mass market. En juist door die mobiele games en door de indiescene en Steam, daardoor is elk merk naar de achtergrond geduwd. Sony en Microsoft waren altijd de grote competitors samen met Nintendo, maar tegenwoordig zijn er veel meer spelers.

Nils: Dan over de prijs, dat vind ik wel een interessant. Op basis waarvan hebben Sony en Microsoft gekozen voor de prijzen 400 en 500? En in hoeverre heeft de prijs invloed gehad op de verkoop?

Bart: De prijs maakt enorm veel uit. Die 100 euro dat is voor heel veel gezinnen en andere mensen serieus veel geld, daar kan je ook weer games voor kopen. Dus dat prijspunt heeft zeker effect gehad. Het is soms ook heel moeilijk uit te leggen waarom iets een bepaalde prijs heeft. Dus dat is zeker in hun penetratiestrategie een verstandige keuze geweest denk ik, want je bent meteen in 10.000.000 huishoudens in plaats van 1.000.000. Ik denk dat Xbox gezegd heeft "f*c kit, we hebben een lange adem, we zijn miljardair met Windows en kloppen iedereen zijn zakken leeg," terwijl Sony vrij slecht ging, bijvoorbeeld door verkeerde gokken met plasma-TV. Dus Sony heeft veel meer moeilijkheden gehad, dus ik denk dat ze er goed aan hebben gedaan die prijs laag te houden. Ze verdienen geen cent op de consoles, maar wel op de games die erna verkopen. Dat is ook hun businessmodel.

Nils: Maar de targetgroepen zijn toch een beetje de core gamers, wellicht nog de hobbyisten gamers. Zou die 100 euro daar heel veel voor uitmaken, voor de gamers die hem toch wel gaan kopen?

Bart: Ik denk toch van wel. Vergis je niet, 100 euro is voor bijvoorbeeld studenten of gezinnen serieus geld. Het gemiddelde loon van mensen in Nederland is op dit moment echt niet om over te juichen. Dan is 100 euro veel geld.

Nils: Dus zelfs voor de echte Xbox fans was die 100 euro veel geld en zijn ze overgestapt naar de PlayStation?

Bart: Ja, ik denk toch dat je gerust kan stellen dat mensen die normaal een Xbox kochten dat nu niet meer hebben gedaan. Dit vanwege de prijs, het game-aanbod en misschien in derde instantie het merk. Want als je een Xbox gamer bent dan heb je misschien wat minder met het brand. En volgens een vriend van mij die zich bezighoudt met brands, bestaat loyalty niet. Hij zegt dat het merk wat het hardste schreeuwt en het meeste adverteert continu de meeste klanten krijgt. Merk loyaliteit dat is onzin, dat bestaat niet. Hij heeft 10 of 20 jaar lang wetenschappelijk onderzoek gedaan en zijn school zegt dat het niks is, loyalty.

Nils: Dus bij consoles vooral is het misschien minder belangrijk wat voor merk erop staat, aangezien je gaat voor de content die de bedrijven bieden.

Bart: Precies. De game-industrie is altijd productgericht geweest. Dus het draait uiteindelijk toch om het product zelf in de game-industrie.

Nils: En hebben er veranderingen plaatsgevonden in de prijsstrategieën en hoe gaan deze in de toekomst veranderen? Bij PlayStation zagen we bijvoorbeeld al het verschil in prijs tussen de 3 en de 4.

Bart: Wat PlayStation heel goed doet, en ik weet niet of Microsoft dat ook doet, is het online abonnement. PlayStation heeft PS+, iedereen die economics heeft gedaan weet dat een abonnement een gouden greep is als je dat verkocht krijgt, want het is een slapende inkomstbron. Ik weet niet of Xbox dat ook doet.

Nils: Xbox heeft volgens mij Xbox Live of Xbox Gold. Maar Playstation Plus was altijd gratis op de PlayStation 3, maar tegenwoordig hangt er een prijskaartje aan. Heeft dit invloed gehad op gamers?

Bart: 90% van de mensen gebruikt het misschien niet, maar je hebt altijd dat mensen het een keer proberen. In-game purchases hebben ze nu ook beter geregeld. Xbox is daar volgens mij nog niet zo mee bezig.

Nils: We hadden het net al even over de distributie, want dat is heel belangrijk. Welke distributiekanalen worden hoofdzakelijk gebruikt door Sony en Microsoft? Zijn het alleen retailers?

Bart: Ik denk vooral fysieke retail nog steeds, maar ook Bol.com bijvoorbeeld en aanverwanten. Maar ik geloof dat je een console nog steeds echt in een winkel koopt. Je fysieke distributiekanaal is waarschijnlijk nog steeds het belangrijkste. Dat is nogmaals ook de reden dat ze die CD-drive erin gehouden hebben, want waarom zou je anders nog naar een winkel moeten.

Nils: En hoe zijn de consoles in Nederland gedistribueerd sinds de lancering? En in hoeverre heeft dit invloed gehad op de verkoopcijfers? De Xbox kwam bijvoorbeeld een jaar later uit dan de PlayStation in Nederland. Maar je zag op een gegeven moment ook dat PlayStation nauwelijks leverbaar was in Nederland. Hoe hebben deze zaken invloed gehad?

Bart: Ja, tel die drie maar op bij elkaar. Je hebt het nu gehad over prijs, over een jaar eerder op de markt zijn en een betere promotie. Die drie vullen elkaar aan. Het is niet eens een optelsom van 1+1+1, maar een vermenigvuldiging van 1x1x1. Het blijft mij verbazen als het waar is dat Xbox niet eerder op de markt is gekomen vanwege Nederlandse ondersteuning. Iedereen spreekt Engels! Vroeger lokaliseerde we sommige games voor Nederland door ze te vertalen, dat is helemaal niet nodig. Zeker het momentum is belangrijk geweest, de P van planning wordt vaak niet meegenomen terwijl dat een van de belangrijkste factoren is. Tuurlijk wordt er ook wel eens gespeeld met de beschikbaarheid van consoles, in dit geval PlayStation, maar ik weet niet of het waar is. Het heeft ook te maken met capaciteit.

Nils: Inderdaad, want Sony had zelf ook aangegeven dat ze niet verwacht hadden dat de PlayStation 4 zo succesvol zou zijn, en dat ze daarom niet konden leveren.

Bart: Ik denk eerlijk gezegd ook dat dat zo is. Tuurlijk helpt het soms als iets niet beschikbaar is om de vraag te vergroten, maar ook weer niet. Je wilt gewoon verkopen. Als Xbox beschikbaar was geweest dan had de markt er heel anders uitgezien.

Nils: Het laatste thema is de toekomst. Wat worden volgens u de belangrijkste focuspunten van Sony en Microsoft?

Bart: Ik denk dat een van de pilaren is dat ze hun eigen ecosysteem verder willen uitbreiden. Dus bijvoorbeeld het creëren van een eigen marktplaats zoals Itunes. Ik denk ook dat ze PlayStation Vita niet laten vallen, dat ze toch echt gaan proberen dat succesvol te maken. Een samenwerking met mobiele apparaten lijkt me ook een logische keuze, bijvoorbeeld een deal met Vodaphone, dat Sony games op Vodaphone platformen beschikbaar worden gesteld. Sony zal echt de claim waar gaan maken van het multimedia-apparaat in huis.

Nils: Dus eigenlijk willen ze worden wat Microsoft had willen zijn, of wat Microsoft zegt dat ze zijn.

Bart: Ja, dat klopt. Dat kunnen ze ook waarmaken. Ik denk ook dat indiescene zal blijven groeien. Het wordt daar interessant hoe ze grip kunnen houden op kwaliteit, als je ziet hoeveel apps er zijn, dan zijn er heel veel crap. Dus als PlayStation slim is blijven ze wel kritisch op de waarde van die producten. Ik zie dat de koppelingen met Sony Pictures en Sony Music ook gaat gebeuren, ze zullen wel moeten als antwoord op de Netflix en HBO van deze wereld. Het feit dat je Netflix al op je PlayStation kunt hebben is al slim van ze. Dus dat vooral. En Microsoft gelooft meer in dingen als touchscreens en tablets. Maar dat is hetzelfde als met de Oculus Rift, het is een lelijk ding en is onhandig. Het is een gaming gimmick. Ik geloof er niet zo in. Het is belangrijk om in je achterkamertje innovatief te zijn, maar naar de buitenwereld te presenteren wat op dit moment commercieel waardevol is. En dat doet PlayStation beter dan Microsoft.

Nils: De volgende vraag is, hoe gaan de bedrijven de bestaande producten innoveren en hoe gaan ze nieuwe producten ontwikkelen? U noemde net al de Oculus Rift en Sony is bezig met Morpheus. Dus hoe worden de bestaande consoles geïnnoveerd, hebben we straks nog consoles?

Bart: Ik denk dat dit mogelijk de laatste consoles zijn. Misschien komt er nog eentje, maar die is dan echt alleen maar digitaal. Wat ik tof zou vinden is als er een heel pak komt dat gecombineerd wordt met bijvoorbeeld fitnessapparatuur. Als ik echt die hele beleving wil voelen dat ik in die game zit, dan moet ik vrij kunnen bewegen. Er is niet zo iets als mediocrocy, je doet het of helemaal of helemaal niet. Ik weet niet of het allemaal zo innovatief gaat worden. Ik denk eerder dat er vooral nieuwe toepassingen voor de home consoles worden geschreven en dat de verbintenis te werk en privé versterkt wordt.

Nils: De laatste vraag is eigenlijk een vervolg op de vorige vraag. Zijn er een paar trends die momenteel actief zijn in de game-industrie die mogelijk invloed kunnen hebben op de toekomststrategie van Sony of Microsoft?

Bart: Wat kun je doen? Het is op zijn meest je interface aanpassen. De relevantie van sommige social media pages zoals Facebook wordt steeds lager, omdat ze proberen om meer ‘vrienden’ je kant op te schuiven. Het gaat niet om meer, het gaat om gerichter en relevanter. Ik denk dat de consoles een profiel van de gebruiker moeten opbouwen en leren wie de gebruiker is. Op deze manier kunnen ze relevante suggesties maken. Dat is enorm moeilijk, dat lukt Steam ook niet en Itunes ook niet. Maar daar zou het eigenlijk wel naartoe moeten.

Appendix V – student ethics form

Appendix 6.3 – Student Ethics Form

European Studies
Student Ethics Form

Your name:

Supervisor:

Instructions/checklist
Before completing this form you should read the APA Ethics Code (http://www.apa.org/ethics/code/index.aspx). If you are planning research with human subjects you should also look at the sample consent form available in the Final Project and Dissertation Guide.

a. [ ] Read section 3 that your supervisor will have to sign. Make sure that you cover all these issues in section 1.
b. [ ] Complete sections 1 and, if you are using human subjects, section 2, of this form, and sign it.
c. [ ] Ask your project supervisor to read these sections (and the draft consent form if you have one) and sign the form.
d. [ ] Append this signed form as an appendix to your dissertation.

Section 1. Project Outline (to be completed by student)

(i) Title of Project: Mind games: how Sony and Microsoft play the industry

(ii) Aims of project: Find out how Sony and Microsoft utilise marketing to influence consumer behaviour

(iii) Will you involve other people in your project – e.g. via formal or informal interviews, group discussions, questionnaires, internet surveys etc. (Note: if you are using data that has already been collected by another researcher – e.g. recordings or transcripts of conversations given to you by your supervisor, you should answer 'NO' to this question.)

YES / ~~NO~~

If no: you should now sign the statement below and return the form to your supervisor. You have completed this form.

This project is not designed to include research with human subjects . I understand that I do not have ethical clearance to interview people (formally or informally) about the topic of my research, to carry out internet research (e.g. on chat rooms or discussion boards) or in any other way to use people as subjects in my research.

Student's signature ______________ - date ______________

If yes: you should complete the rest of this form.

Section 2 Complete this section only if you answered YES to question (iii) above

(i) What will the participants have to do? (v. brief outline of procedure):

Fill in a survey, answer interview Questions

(ii) What sort of people will the participants be and how will they be recruited?

Experts on the fields of gaming, direct contact.

(iii) What sort stimuli or materials will your participants be exposed to, tick the appropriate boxes and then state what they are in the space below?

Questionnaires[√]; Pictures[ ]; Sounds [√]; Words[√]; Other[ ].

- Online survey
- interviews

(iv) Consent: Informed consent must be obtained for all participants before they take part in your project. Either verbally or by means of an informed consent form you should state what participants will be doing, drawing attention to anything they could conceivably object to subsequently. You should also state how they can withdraw from the study at any time and the measures you are taking to ensure the confidentiality of data. A standard informed consent form is available in the Dissertation Manual

(vi) What procedures will you follow in order to guarantee the confidentiality of participants' data? Personal data (name, addresses etc.) should not be stored in such a way that they can be associated with the participant's data.

Student's signature: .... **date:** 16-03-2015

Supervisor's signature (if satisfied with the proposed procedures): .... **date:** 16-3-2015