Sony has a PlayStation Now problem



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Today, every major gaming company and its subsidiary cousin is aiming to be the “Netflix of games” in some form or another. Xbox Game Pass, Apple Arcade, Google Play Pass, Ubisoft’s UPlay+, EA Access, and even Nintendo’s Switch Online all bundle together access to dozens or hundreds of games for one low monthly fee.

And then there’s PlayStation Now. Sony’s service started offering monthly subscription game bundles back in the beginning of 2015, long before most of the competition. But a mix of confused marketing and limited access to Sony’s own

first-party catalog has left the service to languish with just one million subscribers (compared to a reported 9.5 million monthly subscribers for Xbox Game Pass) [Update: Replaced outdated 700,000 subscriber number for PS Now from May]. Despite its head start, PlayStation Now runs the risk of being lapped by the subscription competition in the market and the public consciousness.

When PS Now was PS Then

Many of PlayStation Now's problems can be traced back to its launch. Back in 2014, the service introduced itself by charging ridiculously high, single-game, time-limited rental rates for streaming access to a small selection of PS3 classics. After just a few months, that changed to an all-you-can-stream subscription model that included functional streams of 100 PS3 games for $15 to $20 a month.

Today's PlayStation Now bears only a casual resemblance to the version you could subscribe to nearly five years ago. For one, the price was recently reduced to as low as $60 a year. For another, the library of available games now includes over 800 streamable titles across the PS2, PS3, and PS4 libraries (playable on PS4 or PC).

Finally, and perhaps most importantly, PlayStation Now *isn't exclusively a streaming service anymore*. A subscription now also includes access to *downloadable versions* of over 300 PS4 and PS2 games.



PlayStation

That last feature was rolled out just over a year ago and seems like a pretty important addition for the significant segment of the audience that might be worried about streaming gaming's potential latency and quality issues (or those who don't have a sufficiently robust broadband connection). By and large, though, PlayStation Now's partial pivot to downloads doesn't seem to have filtered down to the intended audience. Last month, an informal poll of my Twitter followers found 54% of respondents (who all said they had heard of PlayStation Now) still didn't know the service also offered downloads.

That's not a scientific result, of course, but it suggests a large part of the potential audience still sees PlayStation Now primarily as an expensive streaming service for legacy PlayStation titles, as it was when it launched. Turning a brand with that kind of baggage into an Xbox Game Pass competitor is an uphill battle to say the least.

Work the exclusives

Public perception is only part of the problem for PlayStation Now. The service has also suffered because Sony, unlike

Microsoft, has proved unwilling to use high-demand, first-run, first-party exclusives as an incentive for players to subscribe.

Sure, Sony-produced console exclusives like *The Last of Us* and *Bloodborne* have been on PlayStation Now for a while. But a good chunk of the games Sony uses to set the PS4 apart still aren't offered to subscribers. PlayStation Now members who want to play *Spider-Man*, *Detroit: Become Human*, *Horizon: Zero Dawn*, *Ratchet & Clank* (2016), *The Tetris Effect*, or any *MLB: The Show* titles still have to buy them a la carte, to name just a few.



Enlarge / While Xbox Game Pass subscribers get Microsoft exclusives on day one, *The Last of Us: Part 2* will not be available to PlayStation Now subscribers at launch.

Sony is beginning to show small signs of change in this regard, announcing last month that it was adding *God of War (2018)*, *Uncharted 4*, and *Infamous: Second Son* to the PlayStation Now lineup for a limited time. At this point, though, those games are 1.5, 3.5, and 5.5 years old, respectively, and are available for an MSRP $20 or less as "PlayStation Hits" as well. The vast majority of PlayStation Now subscribers who had any interest probably bought and

played through these games months ago, and their addition at this late date might be too little, too late to serve as a major subscription incentive.

Compare that to Microsoft, which pledged in early 2018 that every first-party Microsoft Game Studios release would be available to Xbox Game Pass subscribers from the first day of their original release. Since then, subscribing to Game Pass has meant day-one access to *Sea of Thieves*, *State of Decay 2*, *Forza Horizon 4*, *Crackdown 3*, and *Gears of War 5*, in addition to hundreds of older first- and third-party titles across all three Xbox consoles.

It doesn't look like Sony will be following Microsoft's lead in this regard any time soon. When asked about adding more first-party titles to PlayStation Now, PlayStation CEO Jim Ryan told GamesIndustry.biz that "the nature and scale of some of the first-party games that we are making leads us to think that, right now, it's better to spend energy on making sure that the launch of those games is a massive entertainment event." Ryan added that "*The Last of Us 2* next year will fall into that category."

PlayStation Plus Plus

Ryan did leave some wiggle room in the company's PlayStation Now plans, noting that "our stance on the inclusion of first party games in PlayStation Now… is very different to our stance 12 months ago. I don't want to say this is what PlayStation Now is going to be like forever." However, Ryan said, "certainly right now, given how some of our first party IP is incredibly special and valuable, we just want to treat them with amazing care and respect and have those launches be clean and pure."

In other words, Sony doesn't want PlayStation Now "free riders" to eat into the initial sales for its major exclusives. That is an interesting position, as Microsoft data

suggests Xbox Game Pass has actually led to an *increase* in pre-orders and franchise sales for games outside the service. But it's somewhat understandable given the market-moving power of a big exclusive game launch.



Enlarge / *Spider-Man* may not have set sales records if it was available for free with a PlayStation Now subscription last year…

In a sense, the disparity between Microsoft and Sony in terms of subscription exclusives shows nothing more than the vast gulf in market position between the two companies. With over 100 million PS4 systems sold worldwide, Sony is probably still seeing decent "legacy" sales even for older first-party titles. Microsoft, which has seen Xbox One hardware sales suffer on a relative basis, probably has more interest in using first-party titles (and even console hardware itself) as a kind of loss leader to attract more regular revenue through subscriptions.

But as Microsoft and Sony both prepare to launch new consoles next year, the relative value of their competing game

subscriptions could play a big role in consumers' purchasing decisions. Why spend a bunch of money up front on PS5 games when Microsoft's "Project Scarlett" hardware and a monthly subscription include instant access to *Halo Infinite* and all future exclusives, in addition to every Xbox One exclusive and hundreds of other legacy titles.

If Sony wants to match Microsoft's Xbox Game Pass success, it needs to do so separately from the PlayStation Now branding and the baggage still leftover from its streaming-focused launch. For a monthly fee, a newly rebranded "PlayStation Plus Plus" (or, you know, a better name) could include access to practically everything in Sony's impressive collection of first-party PlayStation exclusives from the past, present, and future. That would help cement PlayStation brand loyalty and lock new PS5 buyers into a cycle of paying Sony money every month, instead of just when a hot new game comes out.

The coming launch of the PlayStation 5 is the perfect opportunity for Sony to regain the ground it lost since launching with a head start in gaming's burgeoning subscription wars. If it waits much longer, that ground could end up much harder to regain.

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