

Innovate to Win on The Next Level with Hybrid Genre Games

2021 Go Global Mobile Game New Insights





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Methodology and Definition

Data in this report are compiled from App Annie Intelligence

Terms

- Consumer spend is gross spend the sum of payments made before Apple or Google takes a fee. iOS App Store and Google Play share of consumer spend on apps varies, but was generally 30% in this report. Consumer spend includes paid to download and in-app purchases. They do not include revenue earned from in-app advertising.
- For download and consumer spend figures, the apps in this report are counted based on unified apps made by App Annie. In unified apps, similar versions of the same apps with different names and on different platforms are unified. Apps and publishers are reported under their parent company.
- Cross-genre affinity is the likelihood that the users of one genre will use a game in another genre in comparison to the general population's likelihood.
- Data ready as of June 30, 2021

Game Genres

- called Game IQ.

Publisher Headquarter

- headquarter country.

• Games are classified into genres based on App Annie's proprietary game classification taxonomy

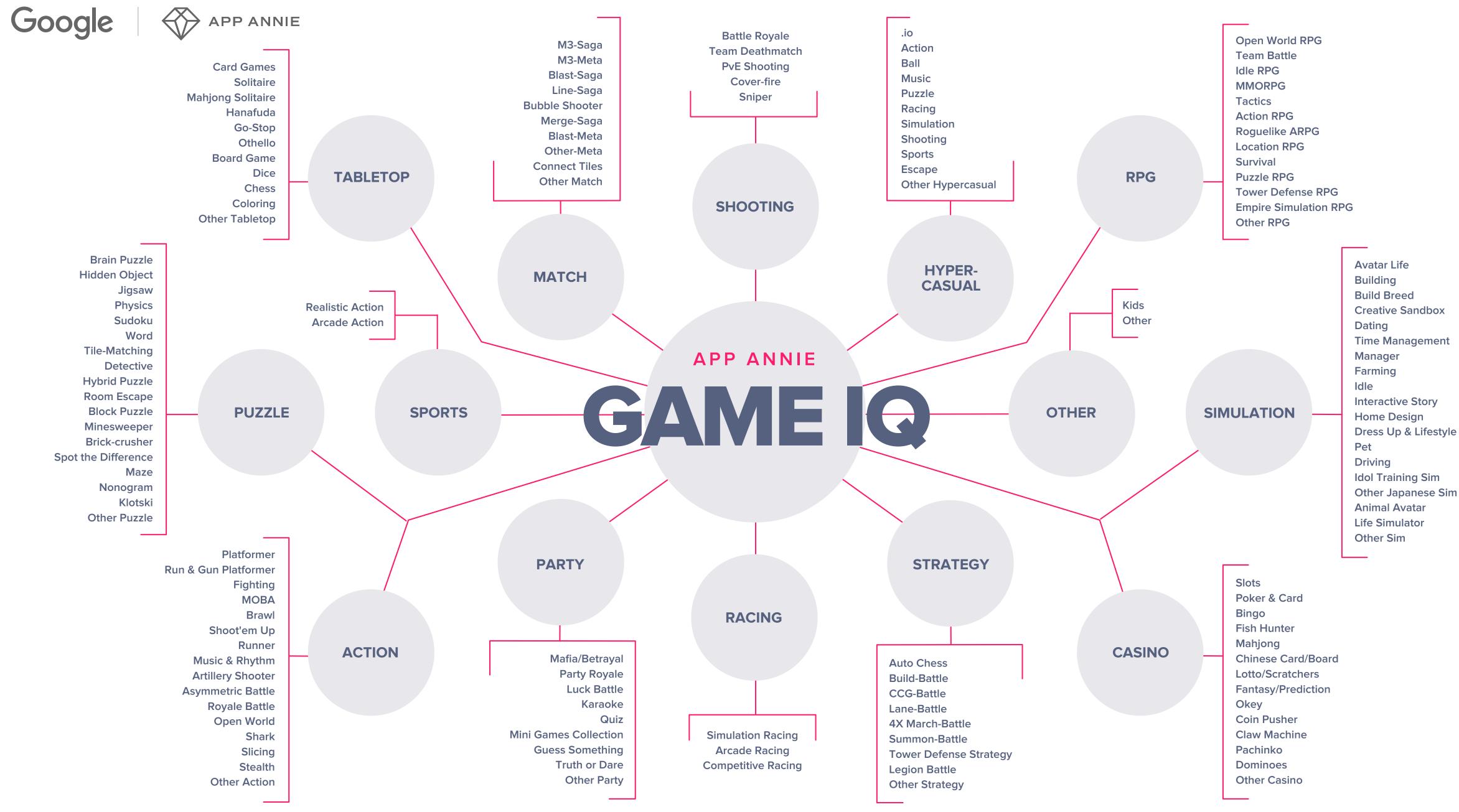
• App Annie's proprietary methodology and framework classifies mobile gaming apps by various attributes such as tuning, genre, subgenre and modifiers, in a scalable manner. This creates a unique classification of the game ecosystem.

• China headquartered publishers were defined as companies which are headquartered in Mainland China. They do not include overseas publishers or companies that are subsidiaries of companies which are headquartered in Mainland China.

• Overseas acquisitions did not change the

Countries and Regions

- Overseas means the markets excluding Mainland China, Hong Kong, Taiwan and Macau.
- North America: United States, Canada
- Latin America: Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Falkland Islands, French Guiana, Guyana, Mexico, Paraguay, Peru, Suriname, Uruguay, Venezuela
- Middle East North Africa: Egypt, Israel, Kuwait, Lebanon, Morocco, Qatar, Saudi Arabia, Turkey
- Southeast Asia: Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam
- West Europe: Denmark, Finland, France, Germany, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom





Take Your Games to the Next Level

Over the years, Google has accompanied Chinese mobile games globalization from zero to hero.

In 2021, we are delighted to see Chinese mobile games reaching new heights in overseas markets. We at Google are grateful to have the opportunity to work with all of you game developers from creating to scaling the games. We look forward to cooperating with more industry partners in 2021 and continue the breakthroughs with our Chinese developers for the next chapter.



Hui Deng Director, Gaming, China Large Customer Sales



New Normal, New Opportunities

It has been a challenging period for everyone globally, trying to adapt to the "new normal." Games have evolved beyond just a form of entertainment and past-time to be a source of bonding, competition, education, relief, and health.

As a global company, App Annie seeks to play our part in this ever-changing landscape by identifying the most granular gaming opportunities and uncovering the best in-game mechanics that impact retention and monetization in every type of game. Together, let us bring the joy of gaming to everyone in the world.



Junde Yu App Annie Vice President and General Manager, Gaming



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Mobile Gaming **Continues to** Level Up







Opportunities for Winners in all Kinds Genres

Growth Can Come in Many Forms



The industry stepped into the new era of growth:

Downloads and time spent are coming down from their pandemic highs but settling into a healthy growth pattern.

• Top-grossing markets are still expanding: Gamers in the top-grossing markets of the US, Germany, and the UK contributed the most to this growth as new areas of opportunity took shape in the markets of Chile and Egypt.



Mobile Gaming Continues to Level Up

Chinese games reached new heights: Since the start of 2020, China HQ'd publishers launched 187 new games into the Top 2000 and grew 47% in consumer spend in H1 2021 to reach the leading mobile game market share position at 23%.



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Top titles are key drivers of growth: The Top 10

Growth opportunities exist in all subgenres:

Opportunities for Winners in all Markets and Genres

grossing subgenres have remained unchanged since last year while new subgenres have leaped into top positions of downloads, signaling a possible shift in gamer preferences.

Applying a scoring model based on the number of games, consumer spend growth, and total time spent can help identify opportunities with subgenres. We have categorized subgenres by their score into Score Leaders, Moderate Middle, and Highly Competitive.



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Innovate and optimize features: Use current market

trends and top-grossing themes and features to grow engagement and revenue.

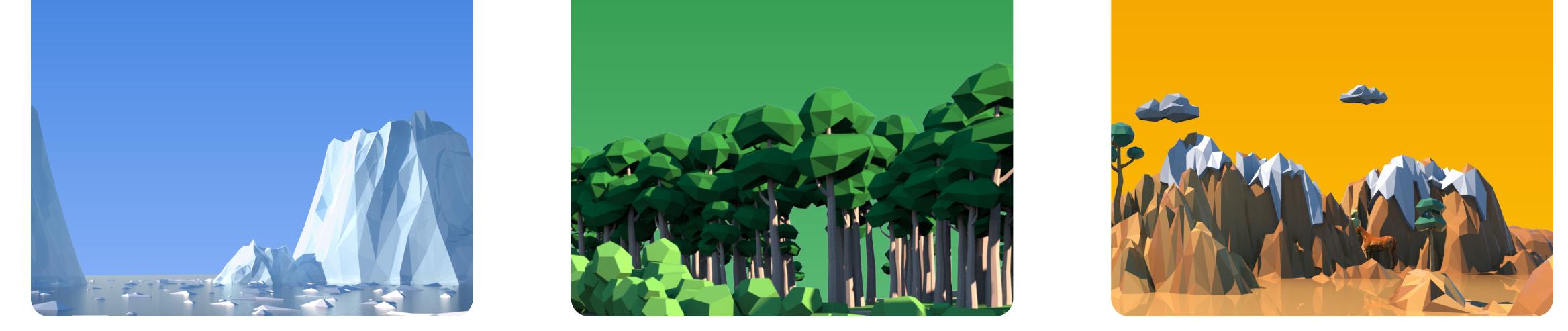
Breakthrough subgenre status quo barriers:

Use hybridization to leverage the strengths of another subgenre to attract a more diverse player base, increase engagement and optimize monetization.

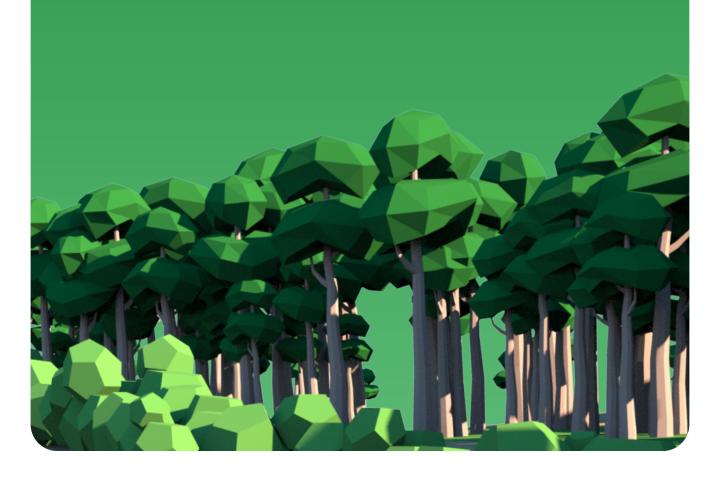
Growth Can Come in Many Forms



Global Market Size & Growth Trends



for China HQ'd Game Publishers



Genre Opportunities

Deep Dive on Subgenre **Opportunities**

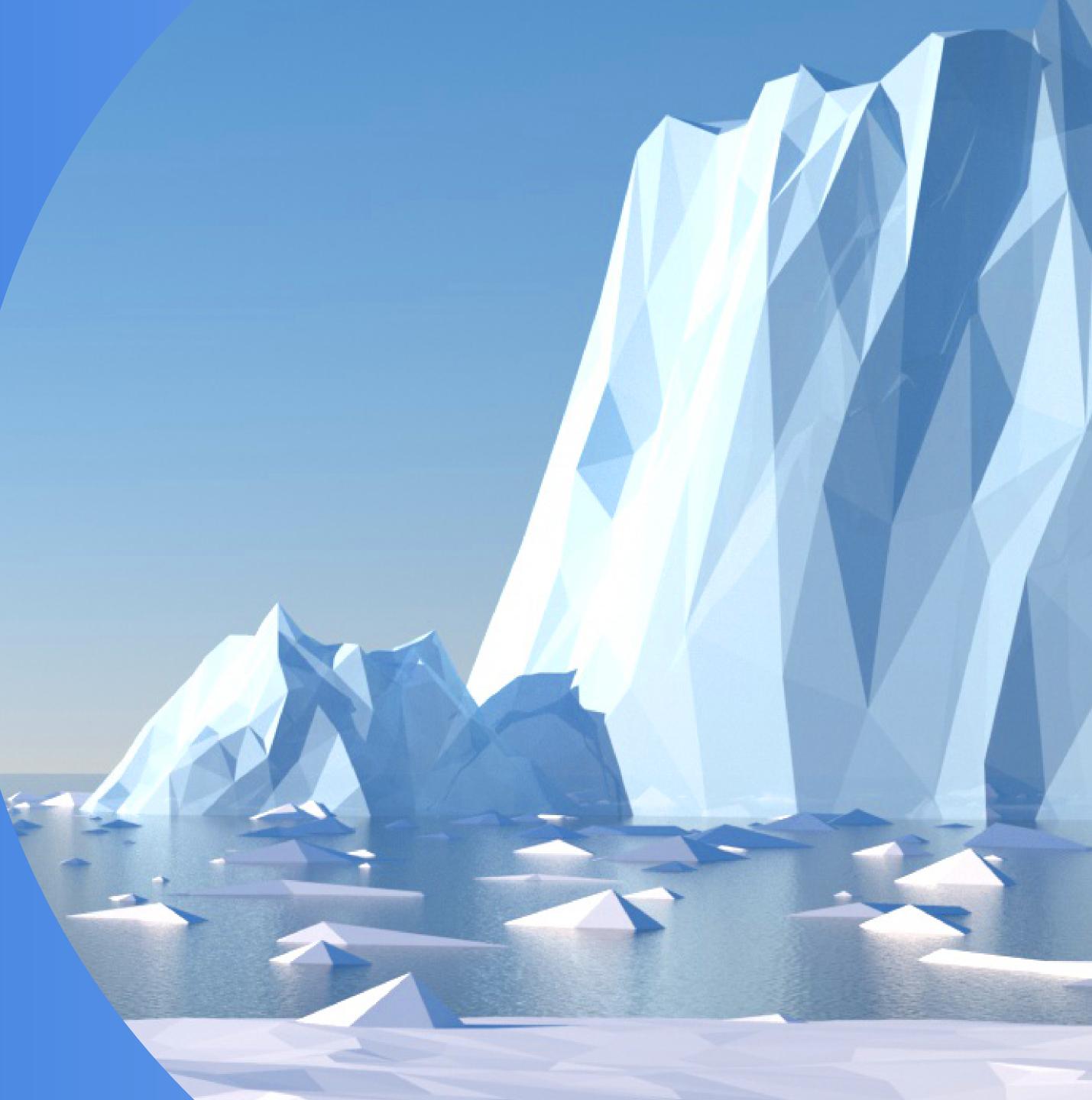






Chapter 1

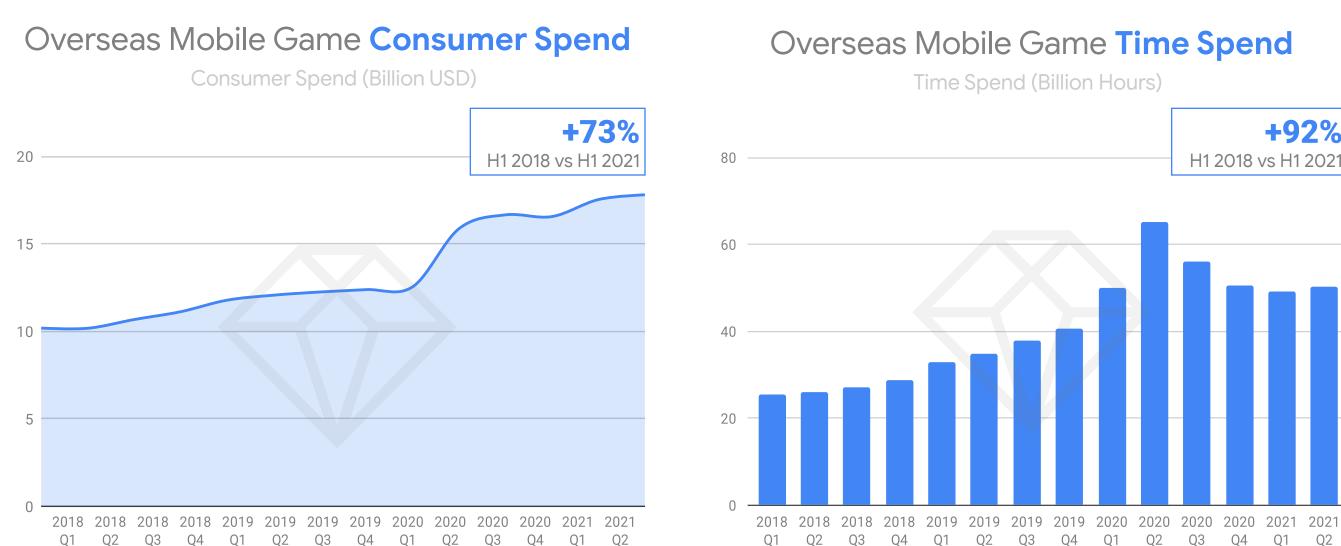
Global Market Size & Growth Trends





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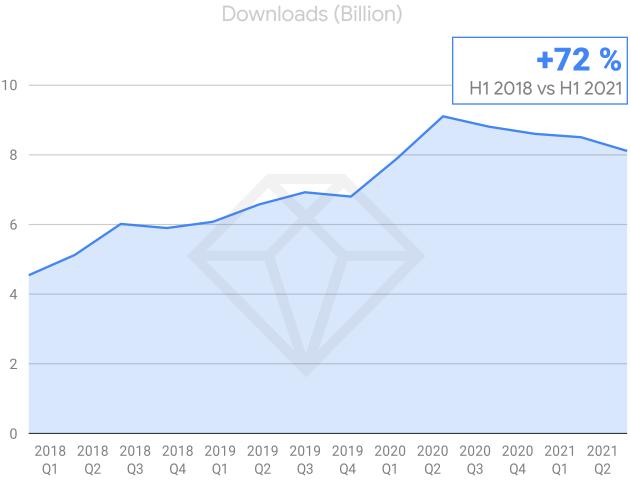
Consumer Gaming Engagement Remains Strong as Pandemic Lockdowns Lift



Overseas Mobile Game Time Spend

Time Spend (Billion Hours) +92% H1 2018 vs H1 2021

Overseas Mobile Game **Downloads**



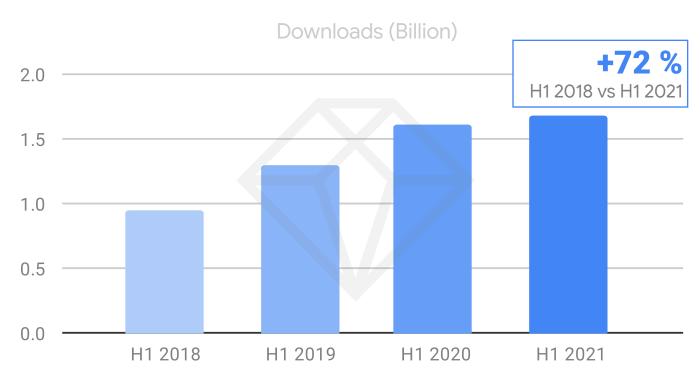




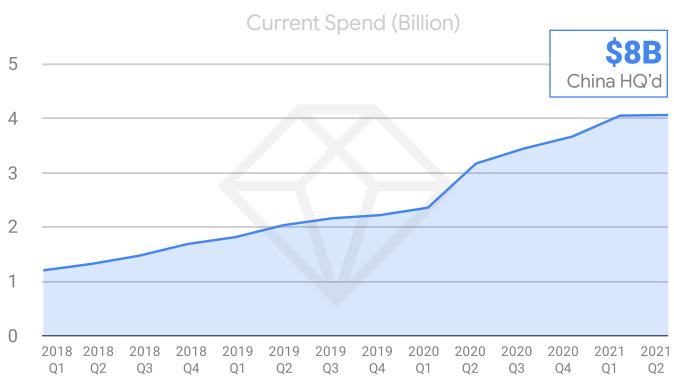
China Mobile Gaming Exports Reached New Highs

- Demand for mobile games remains strong as evidenced by China HQ'd publishers' overseas downloads reaching 1.7B in H1 2021
- Gamers spent \$36B this year globally on mobile games of which **\$8B was spent on** China mobile game exports, 47% year-on-year growth

Downloads in Overseas Market By China HQ'd Publishers



Consumer Spend in Overseas Market By China HQ'd Publishers







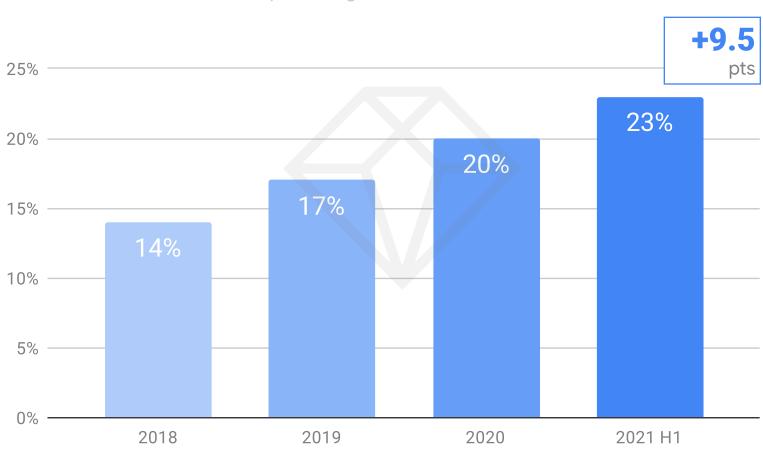
China Grows to Account for Nearly 25% of **Global Consumer Spend on Mobile Games**

- The market share of China mobile game exports in overseas consumer spend has grown steadily by an average rate of 3.2% year over year
- Since 2018, China's share of consumer spend on mobile games has grown 9.5 percentage points

Global Market Size & Growth Trends

Share of China HQ'd Consumer Spend

in Overseas Gaming Market



Top 2000 games, 2018-H1 2021



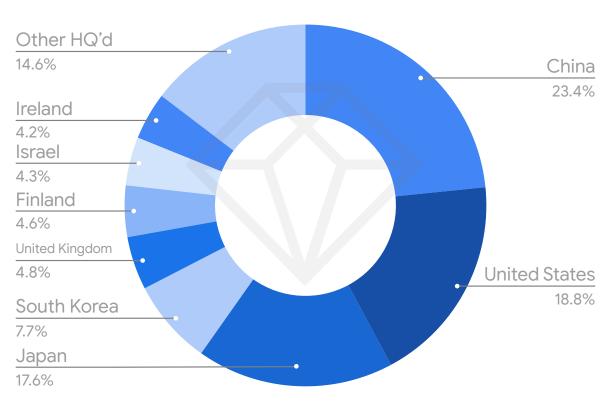


China Game Exports Continue to Increase in Number and Quality-Driving Steady Growth

- China's market share of overseas consumer spend grew by **3.6 percentage points year** over year, establishing China as a leader
- Investments by China HQ'd publishers in 187 new game launches from January 2020 to H1 2020 helped with this growth
- Ireland's growth among top games is primarily due to continued growth in established titles

Share of China HQ'd Consumer Spend

in Overseas Gaming Market



Top 2000 games, H1 2021

Market Share YoY Percentage Point(pp)

vs H1 2020

China 3.6pp United States 0.3pp Japan -3.7pp South Korea -0.6pp

United Kingdom -0.5pp Finland -Isreal -0.2pp Ireland 0.8pp





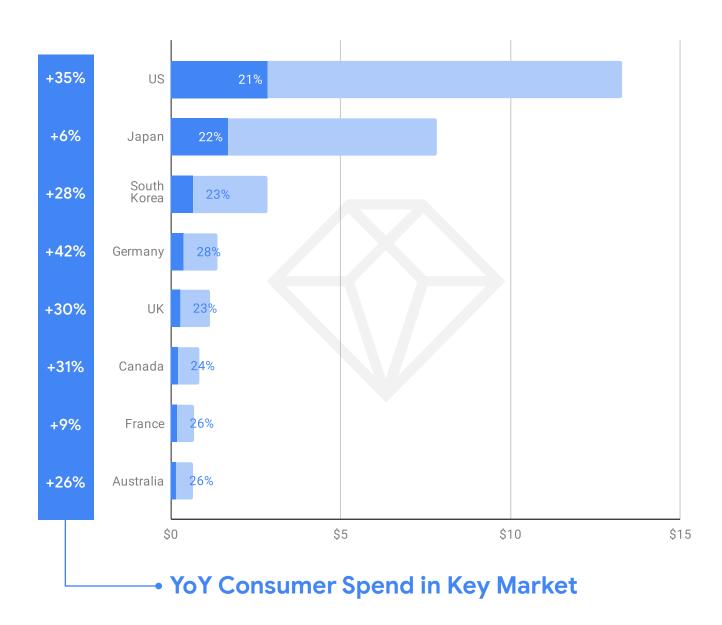
China Publishers Gain Market Share in Top Grossing Markets

- The market share of consumer spend by China HQ'd publishers in Germany surged to 28% in H1 2021
- Slowest market share growth in South Korea (15%) while consumer spend grew 28%.
- China HQ'd publishers saw strong YoY growth in consumer spend in other markets like Chile (+86%) and Egypt (+58%)

Global Market Size & Growth Trends

Share of China HQ'd Games in Key Markets for Overseas Consumer Spend

Top 2000 games, H1 2021, Billion USD







Chapter 2

Genre Opportunities for China HQ'd Game Publishers





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Strategy, Match and RPG Subgenres Remain among the Top-grossing Genres, while Hypercasual Genres Jump in Downloads Rankings for Overseas Spend

Top 10 Subgenres by Overseas Consumer Spend, Top 2000 Games, H1 2021

Rank in H1 2021	vs 2020	Subgenres
1	+1	4X March-Battle (Strategy)
2	-1	Team Battle (RPG)
3	=	Slots (Casino)
4	=	MMORPG (RPG)
5	+1	M3-Meta (Match)
6	+2	M3-Saga (Match)
7	=	Battle Royale (Shooting)
8	-3	Puzzle RPG (RPG)
9	+2	Creative Sandbox (Simulation)
10	-1	Simulation Sports (Sports)

Top 10 Subgenres by Overseas Downloads, Top 2000 Games, H1 2021

Rank in H1 2021	vs 2020	Subgenres
1	=	M3-Meta (Match)
2	=	Runner (Action)
3	+5	4X Match-Battle (RPG)
4	+1	Simulation Sports (Sports)
5	+1	Board Game (Tabletop)
6	+6	Creative Sandbox (Simulation)
7	-3	Battle Royale (Shooting)
8	+1	Team Deathmatch (Shooting)
9	+18	Music (Hypercasual)
10	+3	M3-Saga (Match)





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Diverse Game Play Preferences across Select Markets are Reflected in the Top Subgenres

Top 3 Subgenres by Overseas Consumer Spend in Select Markets Top 2000 Games (H1 2021)

	US		Japan		Korea		Germany	
1	Slots	15%	Team Battle	21%	MMORPG	49%	4X March-Battle	19%
2	4X March-Battle	13%	Idol Training Sim	13%	Team Battle	11%	M3-Meta	9%
3	M3-Meta / Team Battle	7%	Puzzle RPG	10%	4X March-Battle	9%	Team Battle	7%
	UK		Indonesia		Brazil		Egypt	
1	4X March-Battle	17%	4X March-Battle	18%	Battle Royale	12%	4X March-Battle	28%
1 2	4X March-Battle M3-Meta	17% 9%	4X March-Battle Battle Royale	18% 11%	Battle Royale 4X March-Battle	12% 12%	4X March-Battle Battle Royale	28% 21%

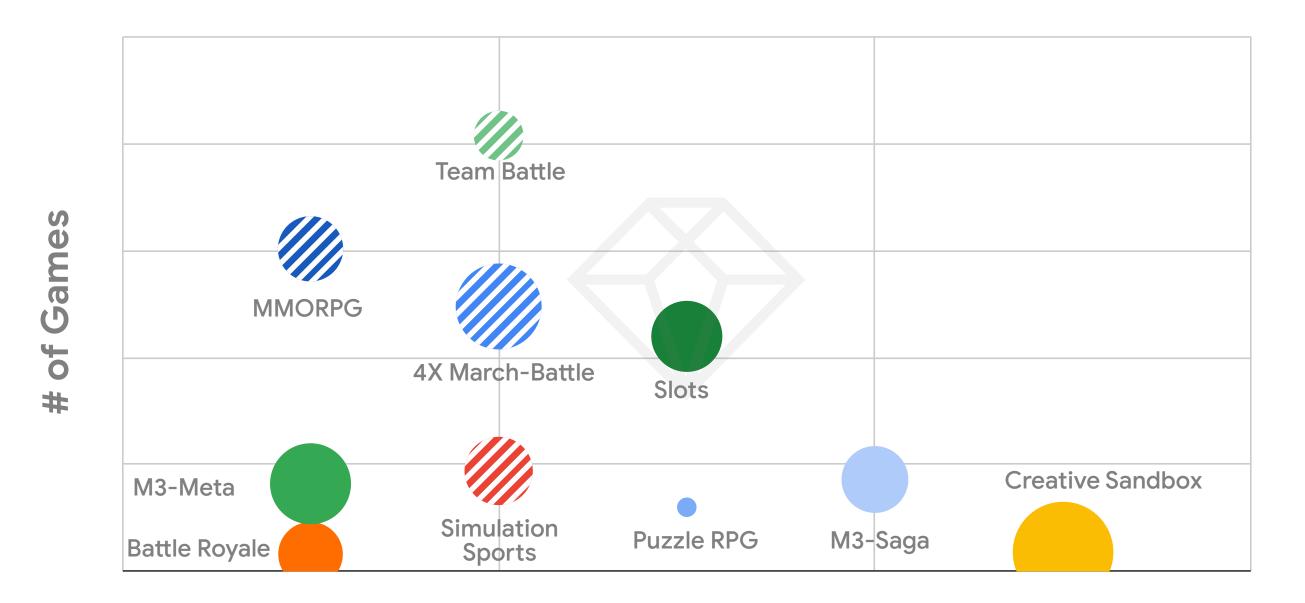
Genre Opportunities for China Game Publishers





Additional Opportunity to Expand Market Share Still Exists in Some Top Subgenres where Mature Titles Have Driven Growth

Count of Games in Subgenre x Average Age of Game Top 10 Subgenres by Overseas Consumer Spend, Top 2000 Games, H1 2021



Avg. Age of Game (Years)

Bubble Size= YoY% Consumer Spend (H1 2021 vs H1 2020)



Less Concentrated Subgenres (Share of total consumer spend of top 5 games in the subgenre is lower than 70%)



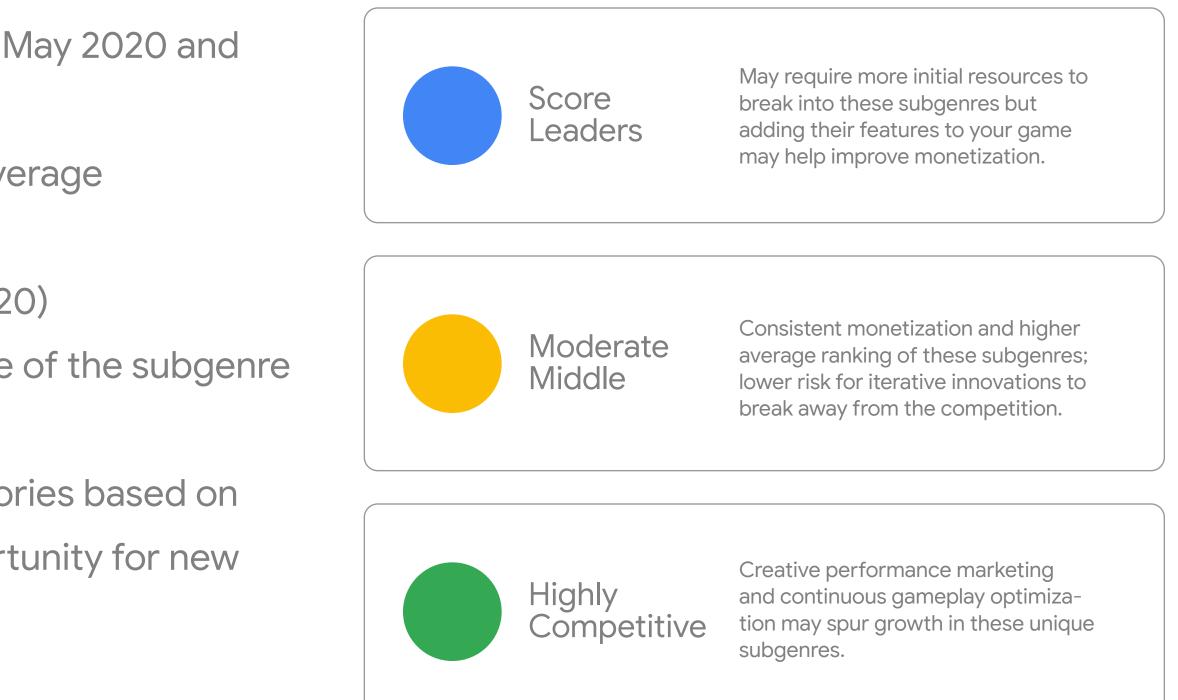


Identifying Opportunities for Growth

We analyzed the Top 2000 games published before May 2020 and scored the subgenres using a combination of:

- Number of games in the subgenre and their average ranking by consumer spend
- YoY consumer spend growth (H1 2021 vs H1 2020)
- H1 2021 total time representing the user base of the subgenre

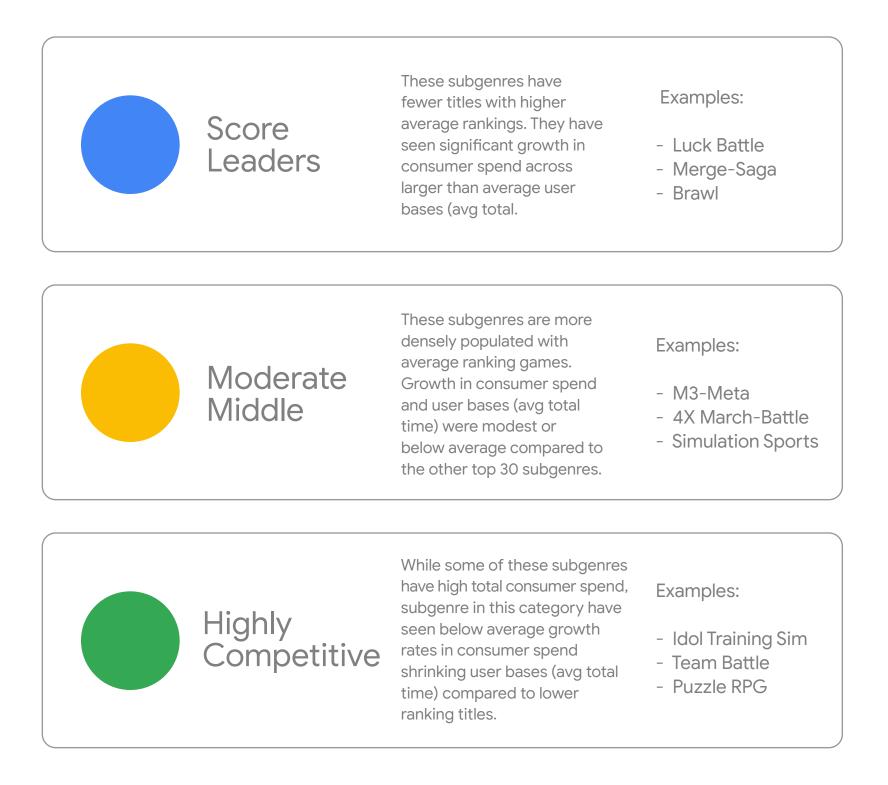
Grouping subgenres by their score into three categories based on their score may help identify specific areas of opportunity for new game launches or growth in existing games.







Subgenre Opportunity Analysis



Genre Opportunities for China Game Publishers

	Score Leaders	Moderate Middle	Highly Competitive
e Score			
Sub-genre Score			
Creative San	abox solitaire Battle Bingo Saga anaton Battle Bingo Brawl Neroe Saga annon Battle Bing Brawl Neroe Saga annon Battle Fighting Brawl	3 Meta MOBA Battle RPG Card oyale ming saga battle ports reports slots saga build battle poker & card oyale non sports ports poker battle poker batt	RPG Battle RPG Battle RPG Sim Action RPG PULLERPG Ide PPG Ide

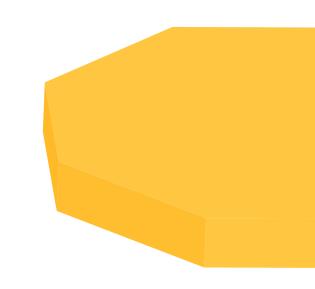




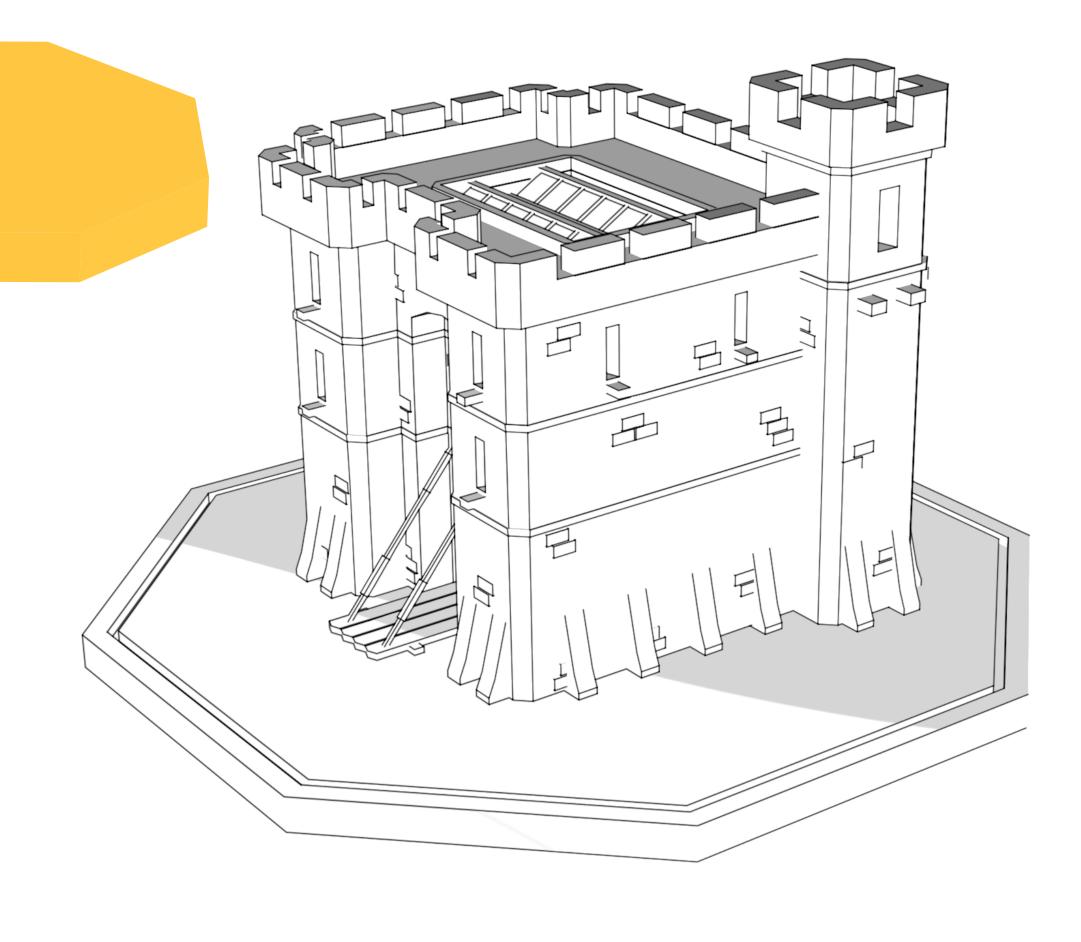
Chapter 3

Deep Dive on Sub-genre Opportunities





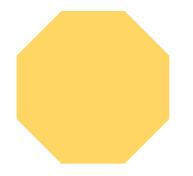
Score Leaders Luck Battle Merge Saga













Player engages with a chance-based game system to battle/loot from other real players Deep Dive for Sub-genre opportunities

Top 5 Games by Overseas Consumer Spend in H1 2021

Rank	Game Name
1	Coin Master
2	Pirate Kings
3	Si Island King
4	Dice Dreams
5	Piggy GO







Luck Battle | Market Overview

Focused on social and community, Luck Battle is one of the top grossing genres where growth predominately comes from a few mature titles



Consumer Spend growth worldwide 2021 H1 vs 2020 H1

Gamers from US, Germany, and UK spent the most



Most downloaded in Brazil, US, and Malaysia Deep Dive for Sub-genre opportunities

Downloads growth worldwide 2021 H1 vs 2020 H1



Total Time Spent growth worldwide 2021 H1 vs 2020 H1

Brazil, US, and France were the top markets for time spent







Luck Battle | Market Opportunities

Broaden appeal of this high-retention subgenre by incorporating farming gameplay and multiplayer elements

Grow with Fan Favorites

Attention getters:

Themes - Fantasy, War, and Asian Culture - Nijigen

Engagement and monetization drivers:

- External Friend Invites (Social)
- Consumables (Monetization)
- Tournaments (Social)
- Any Competitive Multiplayer (Social)
- Events (Gameplay Features)

Deep Dive for Sub-genre opportunities

Expand with High Affinity Subgenres

Luck Battle players also enjoy playing games from these subgenres:

Cross Subgenre Usage

- 4X March-Battle
- Farming
- Slots

13% 13% 12%





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Games with a focus on merging similar items to create more powerful unites or items as well as utilizing saga-based progression

Top 5 Games by Overseas Consumer Spend in H1 2021

Rank	Game Name
1	Merge Dragons
2	EverMerge
3	Merge Magic
4	Mergical
5	Merge Gardens







Merge Saga Market Overview

Maturing category leaders are being challenged by newer games offering fresh combinations that are capturing player spend and attention



Consumer Spend growth worldwide 2021 H1 vs 2020 H1

US, UK, and Germany gamers spent the most

Deep Dive for Sub-genre opportunities



Downloads growth worldwide 2021 H1 vs 2020 H1

Most downloaded in the US, Russia, and Brazil

+11%

Total Time Spent growth worldwide 2021 H1 vs 2020 H1

US, Germany, and India were the top markets by time spent







Merge Saga | Market Opportunities

Iterate on the merge core genre with casual genre combinations or fantasy themes to reach optimal ecosystem mix

Grow with Fan Favorites

Attention getters:

Themes - Fantasy, Lifestyle - Farming

Engagement and monetization drivers:

- Advertising (monetization)
- Events (gameplay features)
- Power Ups (monetization)
- Gacha / Loot Boxes (monetization)
- Consumables (monetization)

Deep Dive for Sub-genre opportunities

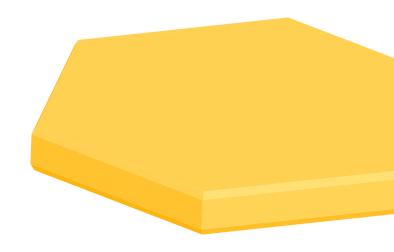
Expand with High Affinity Subgenres

Merge Saga players also enjoy playing games from these subgenres:

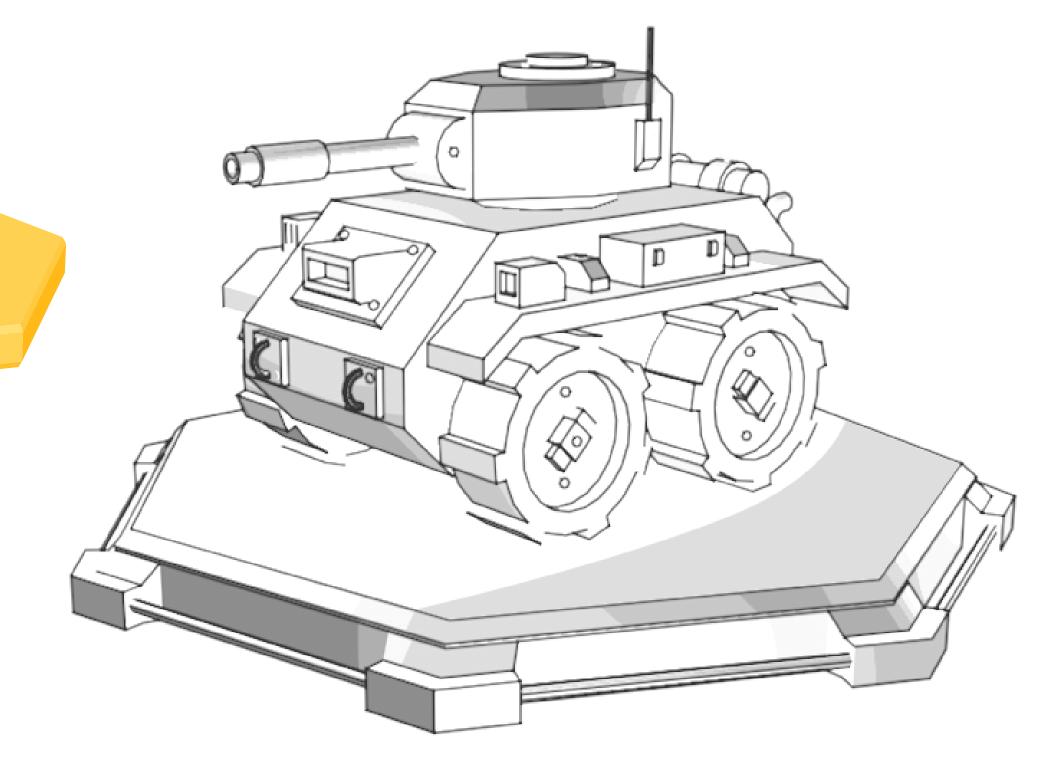
Cross Subgenre Usage

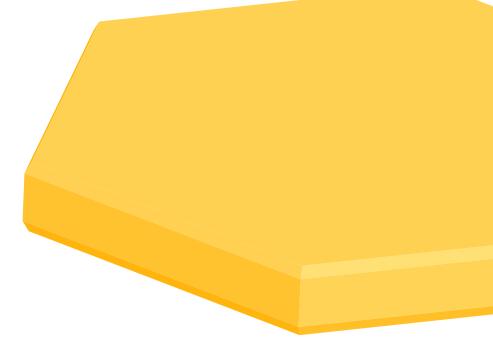
Idle18%Coloring15%Farming13%





4X March Battle M3-meta











4X March Battle

Games where the player grows a city and builds an army that attacks through timed marches on a map

Top 5 Games by Overseas Consumer Spend in H1 2021

Rank	Game Name
1	State of Survival
2	Rise of Kingdoms
3	Lords Mobile
4	Top War: Battle Game
5	Mafia City





4X March-Battle Market Overview

Dominant Strategy genre where growth is mainly driven by existing titles scaling



Consumer Spend growth worldwide 2021 H1 vs 2020 H1

Consumers from US, Japan, and Germany spent the most

Deep Dive for Sub-genre opportunities



Downloads growth worldwide 2021 H1 vs 2020 H1

Most downloaded in the US, India, and Brazil

+31%

Total Time Spent growth worldwide 2021 H1 vs 2020 H1

US, Japan, and Indonesia is the top market on time spend





4X March-Battle | Market Opportunities

Diversify appeal and widen monetization with IP along with simplified casual and core hybridization

Grow with Fan Favorites

Attention getters:

Themes - War, Fantasy, and Western Historical - Medieval

Engagement and monetization drivers:

- Guilds/Clans (Social)
- Chat (Social)
- Events (Gameplay Features)
- Consumables (Monetization)
- Any Competitive Multiplayer (Social)

Deep Dive for Sub-genre opportunities

Expand with High Affinity Subgenres

4X March-Battle players also enjoy playing games

Medieval from these subgenres:

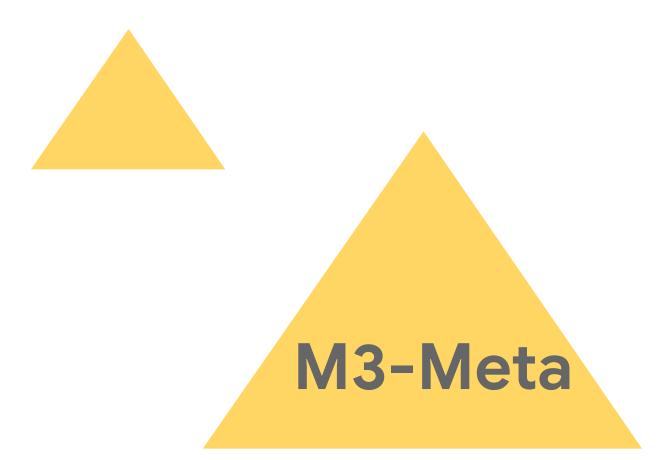
Cross Subgenre Usage

- Idle
- Team Battle
- Shooting

e 18% 17% 11%







Match 3 swapping games with a focus on some form of building in its meta game

Top 5 Games by Overseas Consumer Spend in H1 2021

Rank	Game Name
1	Homescapes
2	Gardenscapes - New Acres
3	Project Makeover
4	Fishdom: Deep Dive
5	Matchington Mansion





M3-Meta Market Overview

Loyal player appetite for different kinds of meta concepts have helped drive consumer spend growth in this crowded casual category



Consumer Spend growth worldwide 2021 H1 vs 2020 H1

Consumers from the US, Japan, and Germany spent the most



Downloads growth worldwide 2021 H1 vs 2020 H1

Most downloaded in India, US, and Brazil; with Brazil seeing the largest growth Deep Dive for Sub-genre opportunities



Total Time Spent growth worldwide 2021 H1 vs 2020 H1

US, Russia, and Japan were the top markets; with US and Russia continuing to grow







M3-Meta Market Opportunities

Match genre with maturing player expectations, new meta concepts, and simplified core genre features focused on motivations of the player

Grow with Fan Favorites

Attention getters:

Themes -Home Design, Female Oriented, and Western Historical - Medieval

Engagement and monetization drivers:

- Power Ups (monetization)
- Events (Gameplay Features)
- Leaderboards (Social)
- Consumables (monetization)
- Social Assists (Social)

Deep Dive for Sub-genre opportunities

Expand with High Affinity Subgenres

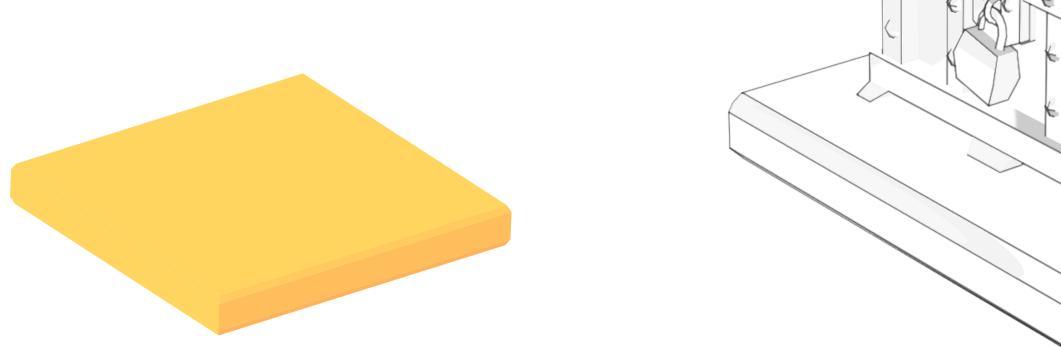
M3-Meta players also enjoy playing games from these subgenres:

Cross Subgenre Usage

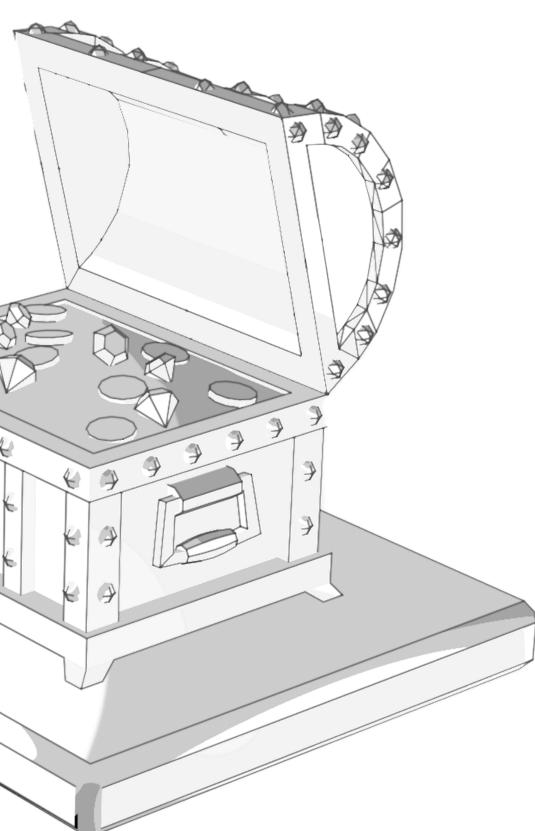
- Coloring
- Farming
- Solitaire

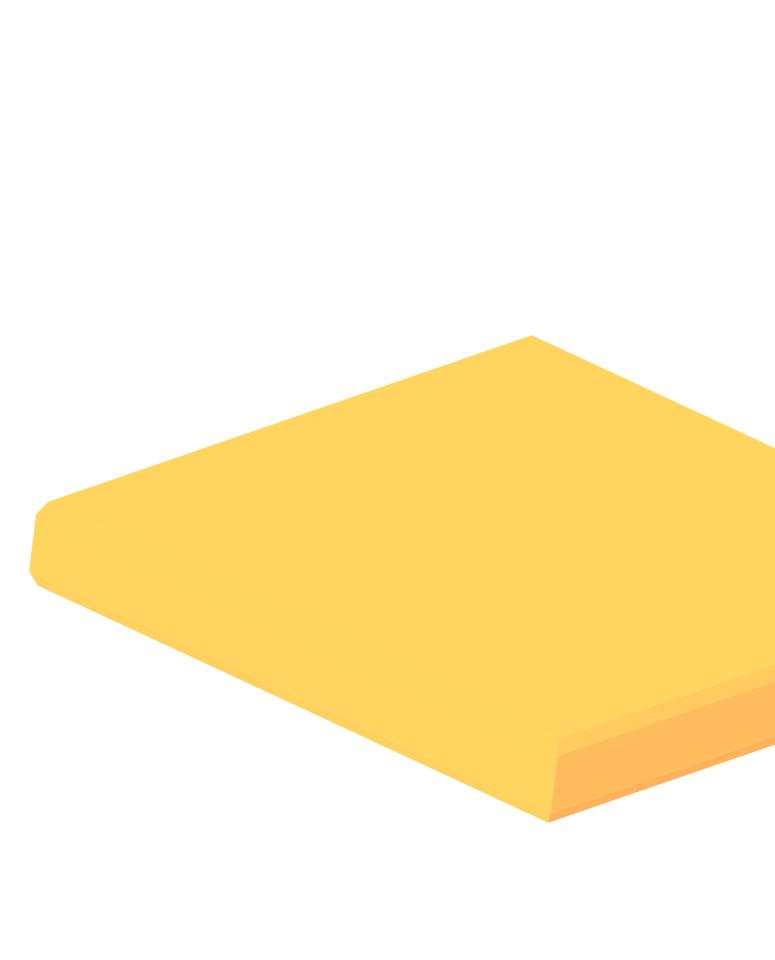
11% 10% 10%





High Competition Idol training Puzzle RPG









Games in which players train and level up Japanese-style idols against different types of activities or professions

Top 5 Games by Overseas Consumer Spend in H1 2021

Rank		Game Name
1		Uma Musume Pretty Derby
2	Music	Ensemble Stars Music
3		Project Sekai Colorful Stage! feat. Hatsune Miku
4		THE IDOLM@STER Starlight Stage
5		BanG Dream





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Idol Training Market Overview

Breakout growth driven by a few new title launches from Japan and China HQ'd publishers



Consumer Spend growth worldwide 2021 H1 vs 2020 H1

Japan, Korea and US gamers spent the most

Most downloaded in Japan, Korea, and US Deep Dive for Sub-genre opportunities



Downloads growth worldwide 2021 H1 vs 2020 H1



Total Time Spent growth worldwide 2021 H1 vs 2020 H1

Japan, Korea, and Indonesia were the top markets for time spent







Idol Training | Market Opportunities

Gacha and Loot Boxes catapult newly launched titles into revenue leader statuses while social features that connect VIPs increase retention and engagement

Grow with Fan Favorites

Attention getters:

Themes - Idol Raising, Asian Culture - Nijigen, and Sports - Other Sport

Engagement and monetization drivers:

- Daily Login Rewards (gameplay features)
- Consumables (monetization)
- Events (gameplay features)
- Gacha / Loot Boxes (monetization)
- Achievements (gameplay features)

Expand with High Affinity Subgenres

Idol Training players also enjoy playing games from these subgenres:

Cross Subgenre Usage

- Dating
- Japanese Sim
- Party

<image>



12%





RPG games that utilize a puzzle system as the primary combat mechanism

Top 5 Games by Overseas Consumer Spend in H1 2021

Rank	Game Name	
1	Monster Strike	
2	Puzzle & Dragons	
3	Empires & Puzzles	
4	Best Fiends	
5	YO-KAI WATCH Wibble Wobble	





Puzzle RPG Market Overview

User acquisition challenges due to new user privacy policies may be impacting growth overall but pockets of it can be found in the subgenre's biggest market, Japan, as well as in the US and Germany



Consumer Spend growth worldwide 2021 H1 vs 2020 H1



Downloads growth worldwide 2021 H1 vs 2020 H1

Gamers from Japan, US, and Germany spent the most, with Germany seeing 17% growth

Most downloaded in Japan, US, and Russia; downloads have grown significantly in Egypt and Philippines Deep Dive for Sub-genre opportunities



Total Time Spent growth worldwide 2021 H1 vs 2020 H1

Japan, Russia, and US were the top markets by time spend, with Russia continuing to grow







Puzzle RPG | Market Opportunities

Nijigen themes are the next opportunity attracting gamers, while for creative design consider incorporating some hardcore game elementsinto consideration, e.g. Team Battle and 4X March-Battle.

Grow with Fan Favorites

Attention getters:

Themes - Fantasy, War, and Asian Culture - Nijigen

Engagement and monetization drivers:

- Consumables (monetization)
- Events (gameplay features)
- Gacha / Loot Boxes (monetization)
- IAPs Starter Pack (monetization)
- External Friend Invites (Social)

Expand with High Affinity Subgenres

Puzzle RPG players also enjoy playing games from these subgenres:

Cross Subgenre Usage

- 4X March-Battle
- Location RPG
- Summon Battle

20% 12% 12%







Appendix





Strategy





State of Survival



Rise of Kingdoms



Lords Mobile



Top War: Battle Game



Mafia City

Summon-Battle Build-Battle



Clash of Clans



Forge of Empires



Castle Clash



Boom Beach



Ark of War

5

3

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Appendix | Top 5 Games by Overseas Consumer Spend of the Top 30 Subgenres



Clash Royale



The Battle Cats



Mighty Party



Castle & Dragon



Art of Conquest

CCG-Battle



Yu-Gi-Oh! Duel Links



WWE SuperCard



Hearthstone: Heroes of Warcraft

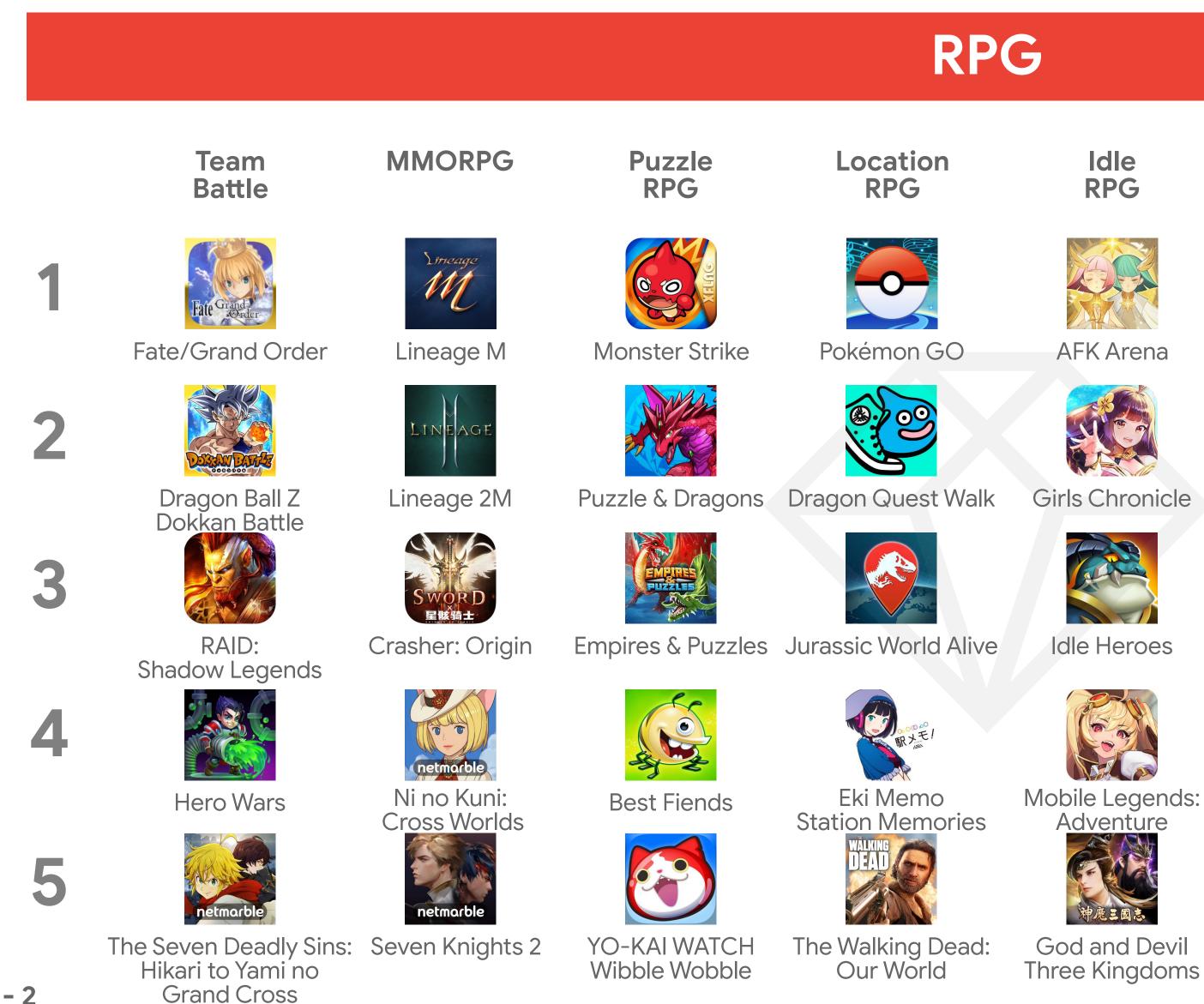


Shadowverse



Magic: The Gathering Arena





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Appendix | Top 5 Games by Overseas Consumer Spend of the Top 30 Subgenres





Empire Simulation **RPG**



Game of Sultans



Be The King



Call Me Emperor



Emperor And Beauties



Kings Throne: Game of Lust

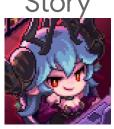
Action RPG



Honkai Impact 3



Story



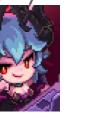
Tactics



Dragon Quest Tact



Colopl Rune Final Fantasy Brave Exvius War Of The Visions



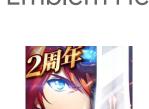
Fire Emblem Heroes



MARVEL Future Fight



BLEACH Brave Souls



Langrisser



For Whom the Alchemist Exists



Guardian Tales





Match

M3-Meta



Homescapes



Gardenscapes -New Acres



Project Makeover



Fishdom: Deep Dive



Matchington Mansion

M3-Saga

Blast-Saga



Candy Crush Saga



Candy Crush Soda Saga



Farm Heroes Saga



Clockmaker



PokoPoko



Toon Blast



Toy Blast



Angry Birds Dream Blast



Pet Rescue Saga



Sugar Blast

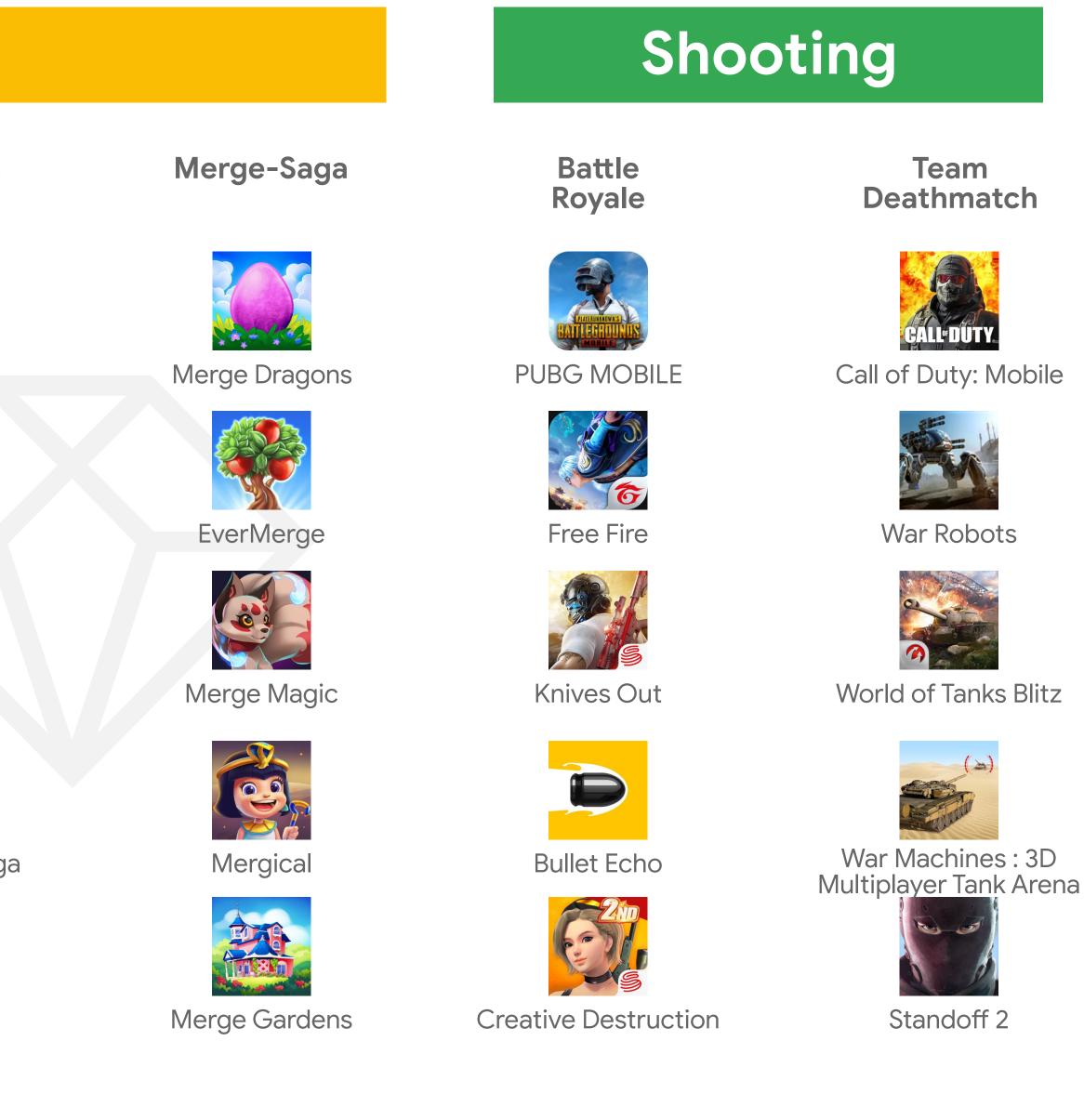
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Appendix | Top 5 Games by Overseas Consumer Spend of the Top 30 Subgenres



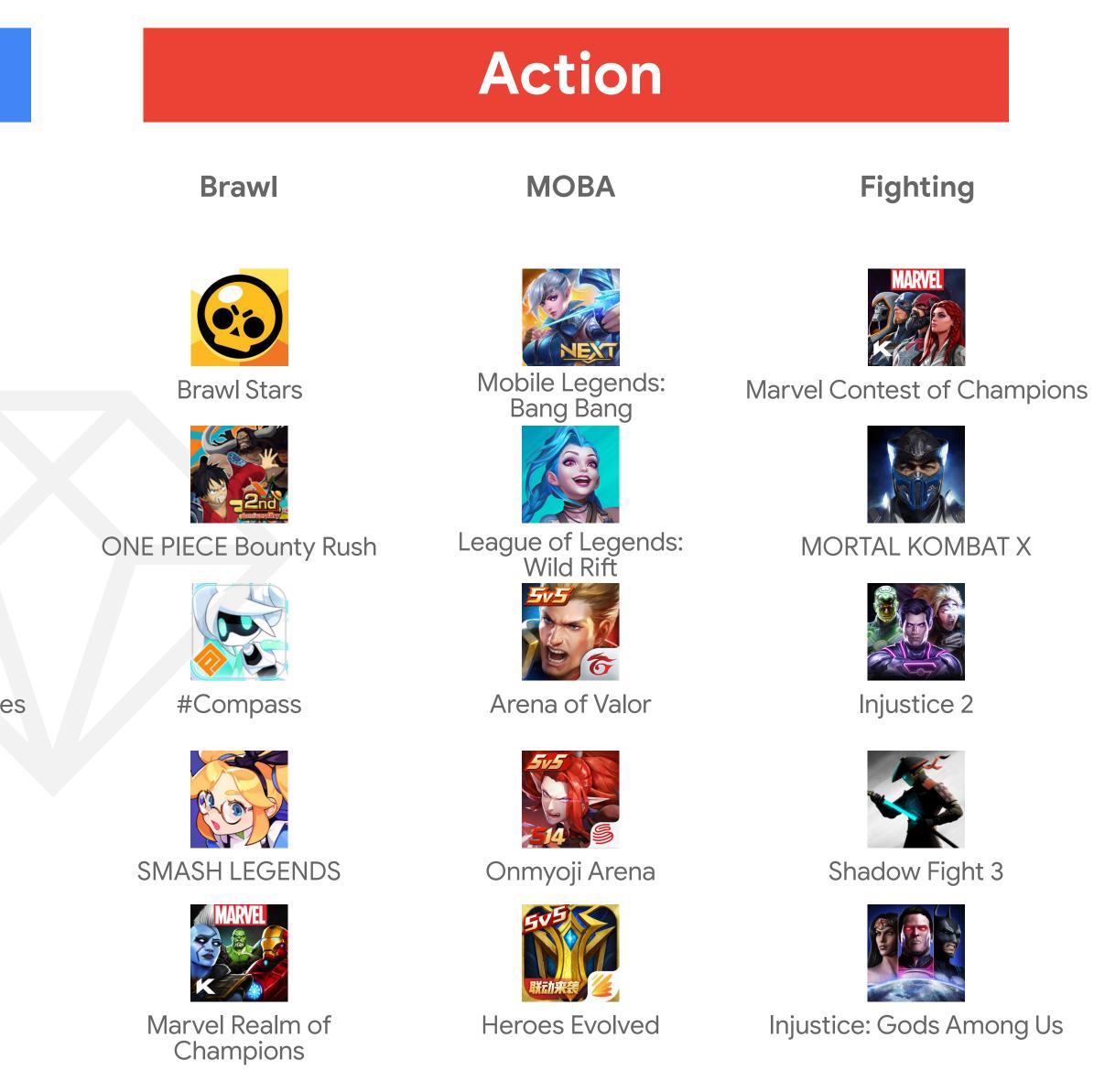




Simulation Creative Idol Training Sim Farming Sandbox ROBLOX Uma Musume Pretty Derby Township MINECRAFT Misic **Minecraft Pocket Edition Ensemble Stars Music** Hay Day 3 Project Sekai Colorful Stage! Klondike Adventures Growtopia feat. Hatsune Miku 4 THE IDOLM@STER Starlight Stage Family Island Blockman Go 5 BanG Dream WorldBox

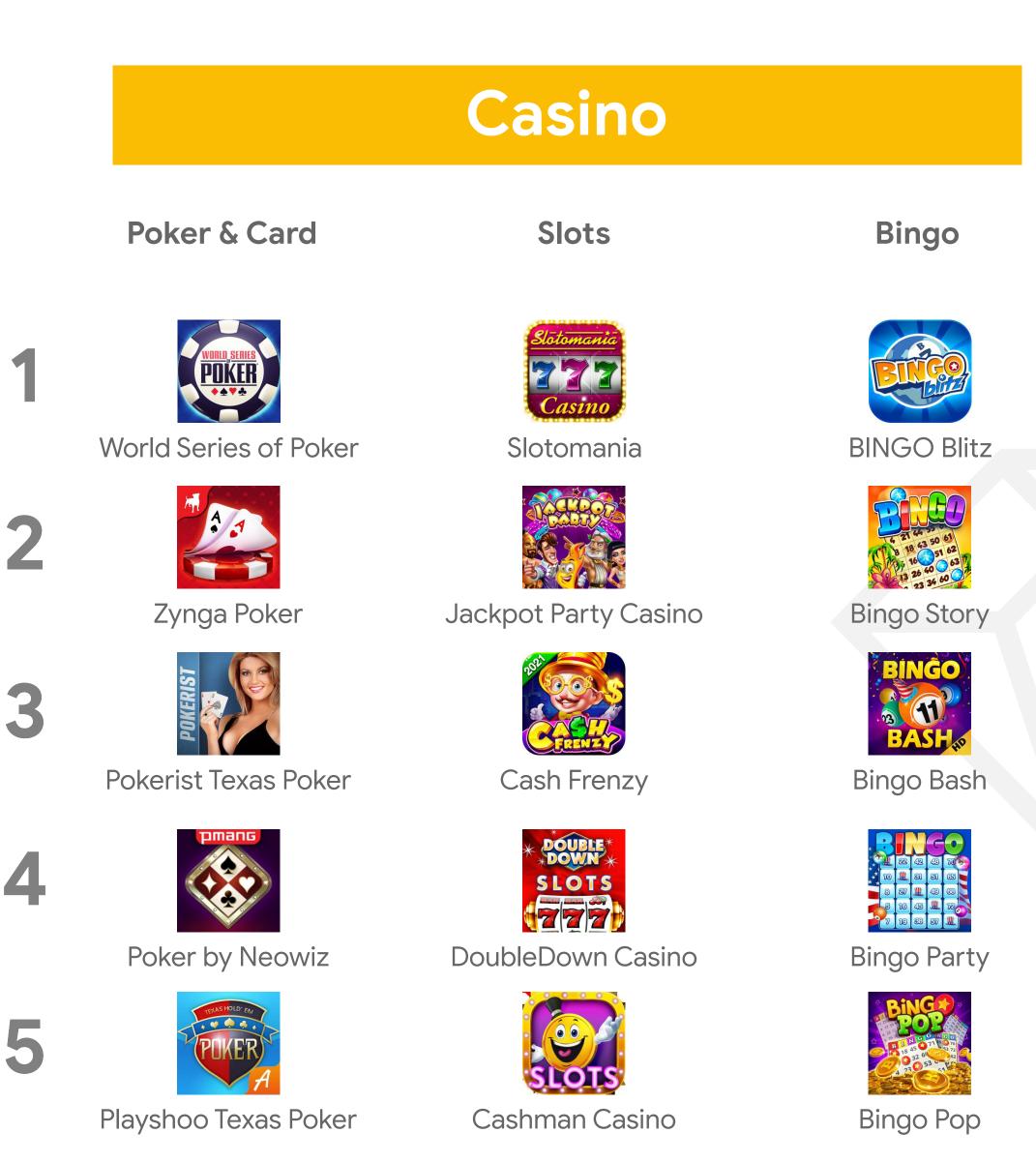
Dragonscapes Adventure

Appendix | Top 5 Games by Overseas Consumer Spend of the Top 30 Subgenres









Appendix | Top 5 Games by Overseas Consumer Spend of the Top 30 Subgenres

Party

Luck Battle



Coin Master



Pirate Kings



Island King



Dice Dreams



Piggy GO



Simulation **Sports**



Professional **Baseball Spirits A**



eFootball PES 2020



Golf Clash



8 Ball Pool



Fash: Fish Gishing Clame 2020



Solitaire



Solitaire - Grand Harvest



Solitaire TriPeaks



Solitaire Cruise TriPeaks Game



Pyramid Solitaire Saga



Solitaire TriPeaks Journey





