
From: Martensson, C-F </O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=AF694CF70F29471BA3C40560E91F80F1-MARTENSSON,>
To: Maguire, Nick; Dutta, June; Hale, Henry; Bagwell, Alexander; Michel, Adam; Blair, Lyndsay
Sent: 10/23/2020 11:23:50 AM
Subject: RE: An Interview Microsoft Executive Vice-President of Gaming Phil Spencer (Stratechery Daily Update 10-22-2020)

It's a good article, some quotes that stood out:

**We believe the biggest games in the world are going to be games that I as a player can play on any screen I want to go play on*

**There are more games that run in AWS today than run in Azure*

**I'm going to run the full game in a server and stream a video stream down, I think you'll see, I think in five, six years, you're going to see things that are much more distributed in the way that these games run*

[REDACTED]

**There are a lot of gamers that continue to tell me they want to own their library of games, and I don't want to take that away. It's why when certain people call us the Netflix of games, it's different because we actually sell our content at the same time we put it in the subscription, and that's part of the core value proposition*

**The difference in the movie space is when people are playing games, many games have a business model unto themselves once you're in them and they're able to make money when people play. Video, that doesn't really work; once you watch a movie, it doesn't monetize you in any way.*

[REDACTED]

**We called it Xbox All Access, but we think about it some more, is it really Xbox Game Pass Platinum. I want to think about it as a tier of Game Pass, to be honest with you, because I think you're going to see lower priced hardware as part of our ecosystem when you think about streaming sticks and other things*

[REDACTED]

Sincerely,

C-F Martensson

Senior Business and Strategy Manager

Phone: (650) 556 - 5413



PlayStation.Plus



PlayStation Now

From: Maguire, Nick [REDACTED]

Sent: Friday, October 23, 2020 7:37 AM

To: Dutta, June [REDACTED]; Hale, Henry [REDACTED]; Bagwell, Alexander

[REDACTED]; Martensson, C-F [REDACTED]; Michel, Adam

[REDACTED]; Blair, Lyndsay [REDACTED]

Subject: FW: An Interview Microsoft Executive Vice-President of Gaming Phil Spencer (Stratechery Daily Update 10-22-2020)

FYI – it's a long interview but an interesting read, [REDACTED]

(Sorry Lyndsay - getting this for the 3rd time...)

Subject: An Interview Microsoft Executive Vice-President of Gaming Phil Spencer (Stratechery Daily Update 10-22-2020)

An Interview Microsoft Executive Vice-President of Gaming Phil Spencer

Thursday, October 22, 2020

Good morning,

It has been long time since Stratechery has had a week with two Weekly Articles, but I felt that the Justice Department's lawsuit against Google was both timely and also a good opportunity to tie together a lot of different threads that have been spun out over the last 18 months in particular.

To that end, no follow-up today. For one, I expect there will be plenty of opportunities to talk more about this case, and for another, today was already scheduled for what I think turned out to be a very interesting interview.

On to the update:

An Interview Microsoft Executive Vice-President of Gaming Phil Spencer

I have written about Microsoft's fascinating approach to gaming and the next generation Xbox several times over the last couple of months:

- [This Daily Update](#) compared and contrasted Sony and Microsoft's approaches, which couldn't be more different.
- [2020 Bundles](#) discussed how Microsoft was seeking to expand the market.
- [This Daily Update](#) covered Microsoft's \$7.5 billion ZeniMax acquisition.

This week I had the chance to discuss all of these topics with Phil Spencer, Microsoft's Executive Vice-President of Gaming. Spencer took over Xbox shortly after the disastrous launch of the Xbox One, and has led a complete overhaul in Microsoft's approach. We discussed that and more in this week's Daily Update Interview.

As a reminder, this Interview is also available as a podcast; to add the Stratechery feed to your favorite podcast player visit the [podcast management page](#).

This interview was lightly edited for clarity.

So Phil, I actually have a question right up top, which is what are you actually in charge of? And the reason I ask this is because everyone thinks of Xbox as a console, but from my point of view, it's hard to grok everything that's going on if you're constrained to that. Am I right in that confusion?

Phil Spencer: Yeah. And inside of the company, if you ask [Microsoft CEO] Satya [Nadella] or any of the SLT [Senior Leadership Team], I'm in charge of gaming at Microsoft. So, from Solitaire to Flight Simulator, to obviously the console, anything that we're doing in the gaming business, even platform work we do on top of Microsoft's Azure and dev platform that's already out there is stuff that sits inside of our organization. There are some things like DirectX, which are still part of the Windows team because those are used both for gaming and non-gaming uses. But the way to think of me inside the company is Head of Gaming for Microsoft.

That leads to a second question: where does gaming fit in Microsoft? Microsoft has had this shift under Satya to being much more of a pure play enterprise company, I think very successfully. The consumer businesses are still there, but definitely not quite as featured — one of the things that I've [written a lot about at Stratechery](#) is how the Windows team has been split up and moved down in the priority stack. In that context, where does gaming fit?

PS: I think gaming has seen a real rise under Satya inside the company. I report to Satya, I think gaming for really the first time that I can think of inside the company is part of our earnings calls, it's part of our strategy discussions, I sit in every senior leadership team meeting the company has every Friday as we're going through the company's strategy. When Satya and I are talking about it, at the core we understand the need for Microsoft to have strong engagement with consumers, it's just important to the long-term success of the company. Gaming is a massive market. Three billion people play video games, \$200 billion top line revenue when you look at the gaming business, both of those growing by double digits. Globally, nearly half of the world plays video games. It's a category that we have presence in, we have history, and we have capability. Relative to some of Microsoft's big tech competitors, it's a unique differentiator for us, the fact that we do have a history in gaming. We challenged ourselves a few years ago to realize the full potential of that and how can Microsoft help Xbox and our gaming ambitions grow to the level that they should. I think that's the journey that we're on.

That's interesting, you mentioned a few years ago, there's a lot in there. You mentioned you go to these strategic meetings, which implies that maybe Xbox wasn't at the strategic meetings previously and then you mentioned that there's a shift in priority and wanting to expand this and blow it out. When did this happen? Was this after the

last generation when you took over the team or is that something that predated you?

PS: I would say it was after I took over this job, I took over this job, six years ago in 2014. Man, that's a long time. And I reported into the Windows division at that point. We looked at gaming as part of our WDG to use our internal acronyms, our Windows division priorities. I reported to Terry Myerson along with my peers, that would have been Panos [Panay] running Surface and people building the Windows operating system. And it was three-and-a-half years ago that we made the decision that we should make gaming a top level function in the company, something that the company wants to focus on and Satya put it to me and challenged me in the right way. He said, "For years we've thought about how gaming can help Microsoft and I want to turn that around and actually think about how Microsoft can help us succeed in gaming." Instead of everything we're doing pivoting on some strategy that Microsoft has and how does gaming help us accelerate a Microsoft strategy, actually talking about and realizing gaming as a top level strategy for Microsoft and what are the assets that Microsoft has that can help us differentiate in the gaming market itself?

This is fascinating and actually leads into maybe the question I most wanted to ask you, which is, I think you look back on the last generation and a lot of people point to Sony had a big lead in exclusives and that was one of the reasons they "won" the generation, obviously, Microsoft still sold a lot of consoles, but I think people forget just what a disaster the rollout of the previous generation was. And I think from my perspective a lot of what drove that disaster and it's okay, you weren't there, so you can-

PS: Well, I was there. I was running the first party at the time. I was in a different job.

That's right. You weren't making particularly decisions about DRM and all those sorts of bits that went into it. I think I felt like a big mistake Microsoft made was they were so focused on the original strategic goal of Xbox which was winning in the living room. They had the whole three screens and a cloud as the genesis of this and they got so wrapped up in their own strategy that they totally lost sight of the customer, which were gamers, and they came out with all these policies and a console that just was directly oppositional to what gamers wanted and it was such a setback before it even launched that the fact that you sold as many as you did is almost a miracle from my perspective.

All that to say, I love what you're doing this generation. I love the Xbox Game Pass idea, the Xbox Cloud, xCloud, all that and the way it's all

tied together. The big concern I have is it feels like such a great fit for Microsoft, but it's like, wait, are they making the same mistake where they're prioritizing what is good for them versus what is good for gamers? And how do you make sure that this isn't a repeat of what happened before?

PS: I think it's an awesome line of thinking and something that our gaming leadership team, we challenge ourselves all the time. We say we put the player at the center of the decisions that we make and we build our strategy and our execution around that player, but it's absolutely right that we should challenge that. We should challenge ourselves in every decision and think through: are we really doing this or is this for our benefit?

I would say one of the things that was fundamental to me in migrating our strategy in this direction was the [acquisition of Minecraft](#). When we acquired Minecraft, one of the things I learned early on is you're not really the owner of an IP like Minecraft, you're the curator of an IP like Minecraft, because there's over a hundred million people every month that play Minecraft, they create, they play on every device, they want to have an experience on their phone and then on a console and on PC and that they want that experience to be complete across all of those devices. And when you look at other games that have subsequently come out, if you think about PUBG or you think about Fortnite, what device do those games live on? Are they console games? Are they PC games? Are they mobile games? And what you find is some of the world's biggest games right now are actually pan-device. They're not tied to any one of the devices that were out there.

I'd say one of the meta trends that we identified early on — absent of any Microsoft strategy or Xbox strategy — is that we believe the biggest games in the world are going to be games that I as a player can play on any screen I want to go play on. That's a very different model from the history of games that were so bespoke to an individual piece of hardware. They were fine-tuned to run on one piece of hardware and the idea that you would play a Halo game not on your television in the beginning was just bizarre to think about. Eventually we went to PC, but even then we got keyboard and mouse versus controller. But when you look at the big games today, they exist where a player wants them to exist much like my music, much like my video, technically they're different, but I should be able to engage with the games I want to play across every device.

That is a player driven point of view, it doesn't help Microsoft to have that point of view. We don't have a bunch of pan-device games so this isn't something that's built on the portfolio that we own and that we hope is happening. It's what we see out in the industry when we see the largest games, they're actually able to be played from any device.

You're right, it's not built necessarily on your portfolio, I do have a question about that, but it certainly does align with Microsoft's broader services strategy, Microsoft's Cloud strategy, having Azure as an asset. My sense is I'm very optimistic about it, I see a ton of alignment here and it makes a lot of sense, it's still hard to shake that sense in the back of my mind that Microsoft would do really well in a cross-device cloud based of world — are they going there because that's where it's going or because they really want it to be there?

PS: I'd say it's totally fair questions. I might challenge a little bit that it's naturally better for us because there are more games that run in AWS today than run in Azure, if you look at kind of third parties and where they're used. We have some other meta trends, the rise of subscriptions across every media type, we went through and really enumerated these trends that we thought were going to come to gaming and we said, "Okay, what should we do?" And what assets do we have both as Xbox and Microsoft build our strategy and our products to go and realize this future that we think is coming for games.

At the time when we were doing this and we didn't have any games that were running in Azure, again, AWS was bigger, but we looked at the space and we said, well, there's three areas we're really going to have to go invest. One of them was content, just because we're going to make some moves on some of these strategies probably earlier than the third parties are going to be comfortable moving, and it's much easier for us to exercise new business models and new distribution models with our own content. Plus gamers love great games, and that's an attractor to our platform and we know that.

The community that we have of Xbox Live, we knew it was a strength. People just like to come together, but that community was really locked to an Xbox console. We had very few Xbox Live customers off of an Xbox console, so over the years we've really taken an approach, bring it to PC, bring it to iOS, Android, and Switch and allow third parties and users to engage with their community wherever they are.

And then you're absolutely right, that cloud was a necessary component of this, but it required at that time that we sit down with Jason Zander and Scott Guthrie and the Azure team and really start to chart out a future of how would we be using Azure, because we didn't have blades in those data centers running games today and building out that strategy and it required work. I'll agree we have some unique strengths relative to the competitors because we have content assets, community assets, and a cloud asset as a company that does create differentiation for us. But there was a lot of work that went on by the teams to put us even in the position that we're at today with Game Pass and xCloud and all this stuff coming together.

That makes a lot of sense. You talked about Minecraft being instructional for you, and I think it's a great point. My question is to what extent do you think that more traditional games, which you take the ZeniMax portfolio, and a lot of them are still console type games or PC games and the console/PC distinction has certainly been blurring for a long time now and Microsoft's really leaning into that. But to what extent are these natural fits for whether it be a streaming future or a cross-device future versus sort of games that ought to be created for a different kind of world where you're playing on lots of devices? Minecraft has in many respects maybe backed into that, but it is such a natural fit for this cross device world in a way that it feels like a first person shooter might not be. Or do you think that I'm seeing a distinction that maybe doesn't exist?

PS: I think there is a distinction. I will say, you look at a game like Fortnite and I would ask the same question, what device is Fortnite built for?

That's a great point.

PS: PUBG, same way. I think there's more mobile players of PUBG now than there is on any other platform and I know CH [Changhan Kim] and the team there really well, it wasn't built as a mobile game, but it ended up there. One thing I will say is our approach to cloud right now is not really the future that we see. We are taking what I call a "lift and shift" of games that were either built for PC or built for console and putting them on the appropriate blades in an Azure data center, and then streaming a video stream down to any local device that somebody can decode that stream and go play. That enables that content to reach more customers or reach the same customer in different contexts, which I think is valuable. But in the longer run we want, and we believe developers will start thinking from the beginning of the creation of their game, that their game might end up on these different screens.

Right. But it has to exist first. The market has to be there

PS: That's right. So this again goes to the first party need. We can kind of bootstrap with and learn with our own teams and we're doing this, we're building games, we haven't announced any of these, but that are more cloud native. If you look at games like EVE or WoW, it's interesting. Are those cloud games, are they native games? Yes, there's a client app that you run, but all the logic and everything happens on the server. I think the future that we'll go to, isn't just going to be, I'm going to run the full game in a server and stream a video stream down, I think you'll see, I think in five, six years, you're going to see things that are much more distributed in the way that these games run. We're just very early in that taxonomy.

So I think your analysis is right, if you look at some games, well this game

was really built for a TV-size screen and me sitting on a couch ten feet away from it, with a controller in my hand and it's not really built to be seen on a small screen and all the challenges there, but you have to start somewhere. And when I look at the successes, like a PUBG, or Fortnite, or a Minecraft, and we could go through others where people are cross-playing across so many different devices and playing with each other and picking up on one device and continuing their experience that they started on another device. I believe that is a player-centered strategy and hopefully not a Microsoft-centered strategy, because that's not why we built it.

I like that. I like the idea that you have to create the market for developers to even figure out what things are possible. One more question on the ZeniMax bit, you mentioned that you will honor your exclusives with Sony and a lot of the question about exclusives were focused on consoles. Whereas the angle I'm actually more interested in is the Steam angle where Steam kind of built this little empire on top of Windows that as I recall from back when I was at Windows, just drove Microsoft up the absolute wall.

I'm curious how you think about distribution there going forward — is it a situation where this is an opportunity to get people buying games directly or using the Microsoft Store? Or is this a situation where, “Hey, if you want to sell through Steam, go ahead. It's going to be a transaction based model, or you can sign up for our subscription and get all these games directly” and where you're competing basically business model on business model?

PS: We've had a really good partnership with Valve over the last few years, I don't believe that exclusivity —

This was a decade ago, to be clear so you're also absolved from everything here (laughing)

PS: I remember those days as well. The fact that our Windows Store is still a work in progress is something that we shouldn't hold our head high as Microsoft in that space.

When people say exclusivity and they think about if you want to buy our games, I want to make our games available to buy in the top marketplaces. I don't think that I win by competing on where you can buy our content, but I wanted to make some promises to my customers that if you buy a version on Steam, you can play with the version you bought on the Windows Store or with the people that are subscribers to Game Pass. There needed to be a continuity of the experience once you own the entitlement, or you have the entitlement on your subscription, that is continuous, regardless of what storefront you bought it in. We've put games in Epic's game store as well,

and that was one of the things that we had to work through with those teams is, yeah, I love people having access to where they want to buy. You can buy an Xbox at different physical retailers, I kind of look at it in a similar way, but once you own that entitlement, I want to make sure you are a Halo customer. You're our Halo customer, and I don't have to think about the Steam Halo customer is separate from the Windows Store Halo customers and so on. I'd say we're along that path, we've made a lot of progress. There's still certain franchises that we have work to go do there and there's stuff to work on to make it complete, but that was the strategy there.

In terms of Game Pass, it's a choice. There are a lot of gamers that continue to tell me they want to own their library of games, and I don't want to take that away. It's why when certain people call us the Netflix of games, it's different because we actually sell our content at the same time we put it in the subscription, and that's part of the core value proposition. But I do believe in the value of Game Pass, and I agree that I think one of the points you're making that the fact that a game is available for \$40, \$50, \$60 in a retail outlet does add value to seeing it in a subscription.

Yeah because you can see the price of exactly what you're getting.

PS: You can, but I don't want to take that away and I don't want to take the ability to purchase games away. For us, the difference in the movie space is when people are playing games, many games have a business model unto themselves once you're in them and they're able to make money when people play. Video, that doesn't really work; once you watch a movie, it doesn't monetize you in any way. For us to reduce access from the ability to play, if you want to go purchase, it's kind of counter to our strategy of just giving you choice.

You've talked about the Series S expanding the market, and I'm curious what you think is going to have a bigger impact? Is it going to be the fact that you have a lower price console from day one or that it's available via this subscription pricing? I think it's \$25 a month to get that out there. I know you experimented with this pricing in the latter years of the current generation, and based on that, I'm curious, how much of an impact do you think that's going to have? Or is the real expansion just going to be, hey, \$300, you can get a current generation?

PS: I'm a huge believer in what Xbox All Access will mean. I think in launch, it'll get muted a little bit just because there's such a core —

The core gamers buying.

PS: Yeah, we'll sell more Series X's than we will Series S's in the first few months. There's no doubt. Those are the people that'll line up and that's

great. We built both consoles for a reason. I wanted to start them both at the same time so that I could build one common development platform for developers, and they knew both hardware were going to be in the market and both would have volumes. Adding something like Series S a couple of years down the road, I think would have been a challenge in terms of software compatibility so I wanted to have them both at launch.

Getting All Access going, as you said, we kind of trialed it at the end of the Xbox One generation because there's credit checks and retailer stuff that we have to do so that when you walk in, we're integrated into their systems so that they can do all the right work that they need to do to attach that. But I love the fact that I wouldn't call it global yet, but we're in more markets than we've ever been. I'm seeing good uptake even on the pre-order where I think we have our most kind of cost unconscious customer at the beginning, our hardcore customer that wants the very best and just wants to own it outright. But I think about over the years, Xbox All Access with that content subscription is going to be just a really strong value proposition for many, many people. I believe that and we see it, you see it in the mobile business, you see it in other places.

When it comes to Xbox All Game Pass, are you buying a console on an installment plan and you get access to all these games? Or are you subscribed to a game service with a console thrown in?

PS: We talk about that all the time internally — is it another tier of Game Pass? We called it Xbox All Access, but we think about it some more, is it really Xbox Game Pass Platinum, which just happens to come with the hardware? And you can even think about other models where maybe there's even some kind of hardware guarantee down the road, we did that a little bit with Xbox One last year, where if you got in All Access, you were guaranteed to get front in line when the Series X came out. People didn't know the name at the time, but yeah. It's a really good question, even in our branding for it.

I think over time, I want to think about it as a tier of Game Pass, to be honest with you, because I think you're going to see lower priced hardware as part of our ecosystem when you think about streaming sticks and other things that somebody might want to just go plug into their TV and go play via xCloud, and they're not really interested in something, even at \$25 a month, you could imagine having us even having something that we just included in the Game Pass subscription that gave you an ability to stream xCloud games to your television and buying the controller. This just goes to branding questions, I want to just think about it all as Xbox. You're a member of Xbox and you might become a member through buying our console or playing on PC or playing on xCloud, but I want you to feel like an equal member and all of these things are accessible to you.

Two quick questions on a very easy to answer issue, which is iOS. Here's the first question. Why is Apple's App Store any different than the Xbox Store? I mean, you guys charge allegedly 30% or in that area and you can't use a different payment system when it comes to console games. Why should we think about iOS as being any different?

PS: Well, let me unwind because I think my problem with having xCloud in iOS is not the 30%. We're banned from having a gaming subscription in the iOS App Store. It's not actually an economic problem for us it's actually an access problem. I can't ship the app. They stopped us.

Would you accept Apple Arcade if they shipped an app on Xbox?

PS: I would have to look at our policies, I don't know. We're having discussions with other companies about bringing streaming apps to Xbox and we think that should be a way that people get to access games. I think at the fundamental level, the difference is a general purpose computing device versus a bespoke gaming console. And there is a difference there just like from a legal interpretation, there is a difference there. But I think you're going to see us be more open on what our console means and how you can acquire games. I know that, it's part of our plans. It's inconsistent for us to have one part of our ecosystem that doesn't function like every other device where somebody's playing Xbox games in terms of the business model and access and we think about that a lot in our building plans to make it more normalized.

So you could almost say the Xbox/PC line is actually going to disintegrate even more? Is that what you're hinting at?

PS: Well, we have the program Xbox Play Anywhere, which allows you to sell a copy of a game on PC and get the entitlement on Xbox and I want to do even more work in that space. You can buy virtual currency on different platforms and have it consumed on an Xbox and I want to continue down that path. Just to be clear again on the iOS thing with xCloud, I actually can't ship the app.

Yeah, no, you're right. I mis-asked the question. My bad. Amazon launched their gaming service and Google with Stadia, they both have controllers that connect directly to the service. Is that a way around to get stuff working on iOS? Where you don't have to deal with the more limited Safari API is as far as controller inputs go and whatnot? Is that where you're thinking as far as getting around the App Store limitation?

PS: It's not going to be a control problem. We have a good solution on iOS

that I think it'll be coming kind of early next year, I feel good about the solution that we have. The WiFi direct connect that both Stadia and Luna and congrats to Marc [Whitten] and the team at Luna on getting their preview out, it's hard shipping a new platform and it's cool to see them doing that. No, that's something that we've looked at. We've had a lot of people like Razer and other companies that are doing bespoke controllers for the mobile platform so we don't really have a need to connect something. They're building controllers that directly connect to those mobile devices, which is I think a great solution in terms of very low latency, because you're literally plugged into the device. We've looked at WiFi connect and it's something that we could put in our roadmap. I think we just continued to evaluate it.

So you have a browser-based solution and you feel confident that it's going to work out and that sort of going to be the path forward.

PS: The biggest issue I think is discovery, right? How do you get customers to actually find it? My friend, Tim [Sweeney] at Epic, he tried with the side loading on Android for a while with Fortnite. I think stores on those devices are as much search engines as they are stores. They're the place that you go to find any content, anything that you might have interest, whether it's the airline you're in or whatever, you go to the store and you search for something and I think the biggest gap for us is you're not going to show up in the listing when people are going for a place to search and we'll have to work around that. That's a challenge for us, it's a challenge for Luna and anybody who's not listed in the App Store, but you expect people to consume your content on iOS.

It's kind of a downer point to end on, I get it, but I do think your point about you might even open up Xbox more is interesting and I believe you. Because I think what's exciting about what Xbox is doing now is having much more of an orthogonal strategy to the traditional console model, the traditional App Store model even and that enables you to do stuff that stays compatible with your nominal competitors while also achieving your goals. I'm very excited about where you're going, I think this console generation will be fascinating to watch.

PS: I appreciate that. Yeah, our console for us is the way we get games on the television, and I really like to think about it that way. People want to play games on the biggest screen in their home with probably the best sound system. I want to think about it though as an equal part of the Xbox ecosystem, but I want to think about PC that way as well, and I've seen you've talked about it. So some of the traditional tropes of how you might look at launch and who's having success, we're kind of pushing against those because I'm not doing everything I can to force somebody to buy one device in order for the Xbox ecosystem to be inviting to them. I want people to play more and to make that content available anywhere. So it's cool to get to talk

about it. And I appreciate that.

Very cool. Well, I appreciate the time and look forward to talking again soon.

PS: Thanks, Ben.

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