ANALYSIS OF THE STATUS AND DEVELOPMENT OF TENCENT GAME IN THE INTERNATIONAL MARKET

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Abstract: This paper takes online games as the research subject and Tencent games as the research object to investigate and analyze its overseas distribution and operation strategy. And Tencent games as a reference system, summed up the experience of Chinese games in the world, problems and deficiencies. The purpose of this paper has two aspects: one is to study the current situation of Tencent games' overseas dissemination, and try to summarize effective overseas game publishing and operation strategies, so as to provide overseas exploration paths for the game industry, which has become an important part of Chinese society, culture and entertainment. Second, it is committed to combining the operation strategy of overseas release of games with cross-cultural communication, trying to explore ways to tell good Chinese stories and "go global" Chinese culture on the basis of game communication. The first chapter of this paper is a research review, which mainly expounds the research background, research significance, research content, literature review and research methods of Tencent games' overseas market development status and development analysis. The second chapter mainly uses SWOT analysis method to study the current situation of Tencent games' overseas market development. The third and fourth chapters are the development problems and countermeasures of Tencent games. The fifth chapter is the summary, summarizing the significance of Tencent games for other game enterprises.
Keywords: Video games; Game overseas distribution and operation; Cross-cultural communication; Game industry

1. INTRODUCTION

The Internet process of the world has reached the second half, and digitalization is subtly affecting everyone. Game manufacturers build virtual worlds, endowing virtual worlds with unique video game cultural core, so as to provide similar game players with a communication place beyond the time and space barriers. Chu Jinyong pointed out that with the increasingly strong momentum of game industry to spread abroad, the game industry market has been regarded by the Chinese game regulatory authorities as a feasible channel to export products and cultural confidence, and as an available international media carrying "Chinese stories" to serve the cultural export.

Our country's game industry is far more than the film and other cultural carriers, become the leader of Chinese culture to the world. Many domestic games with Chinese culture as the background are loved by overseas players, and with the development of the game market, Chinese food and beauty, historical allusions, local conditions and customs are rapidly spread to all over the world. For example, Tencent's popular game "Honor of Kings" fully demonstrates the long-standing Chinese civilization through many historical figures and characters with rich ancient rhymes; Food Language promotes cuisines from all over China, creating a colorful "gluttonous feast"; NetEase launched "Painting true. Brilliant brush Thousand mountains" with "thousands of miles of rivers and mountains map" as the game scene, to show the world China's famous paintings.

This paper tries to clarify the effective strategies of Tencent Games to develop overseas markets, so as to provide impetus for the overseas development of Chinese game industry. At the same time, it tries to combine the operation strategy of overseas release of games with cross-cultural communication, and explores the path of "going out" of Chinese culture based on game communication.

2. RESEARCH REVIEW

2.1 Research on Chinese Games Going Overseas

With the accelerated expansion of the video game industry, the audience tends to be younger and doubles year by year, and the game has become an important channel of national cultural export. Since 2016, the academic research on Chinese games going abroad has become more and more hot, with 10 relevant academic results published in 2019, 18 in 2021, and a total of 54 published by March 2022 (the statistical condition is that the title of the article contains the keyword "games going abroad").

In recent years, online games in China have developed rapidly. Among them, self-developed mobile games have not only achieved high overseas sales, but also made new breakthroughs in e-sports related to the game industry[1-5]. Online games have advantages in the construction of cultural soft power, and gradually tell the mainstream way of Chinese stories. In the context of the export of American game culture and the "second dimension" of Japanese games, Chinese games are going abroad in recent years with distinct "Chinese style" elements. For example, NetEase Games' "Hashi Kibo" is the most popular mobile game among Japanese players in the three countries. Another popular game to

go abroad is Miha's Original God, which shows the charm of Chinese aesthetics to the world through the plot and scene with strong Chinese color. With the rapid development of the game industry, the domestic market tends to be stable after nearly 10 years of rapid development, and the importance of exploring overseas markets for the development of enterprises has become increasingly prominent.

Case studies are common in the study of the game industry's overseas strategy, mainly including enterprise case studies and game product case studies. In the enterprise case study, taking LT Company as the object, based on the game strategic marketing management theory and game marketing theory, this paper deeply analyzes LT company's market selection and positioning, marketing strategy formulation, price and channel strategy[6]. Based on the Original God, Zhang Yan et al. discussed the innovation and promotion mode of domestic games under the background of the integration of culture and tourism. In addition, the study of Chinese games going abroad from the perspective of cross-cultural communication is also a representative direction.

2.2 Research Questions

Through the investigation and analysis of Tencent games' overseas distribution operation strategy and communication effect, this paper answers the following questions:
What is the development status of Tencent Games in overseas markets?
What strategies do Chinese game companies represented by Tencent Games use to expand overseas markets?

2.3 Methods of Research

Literature research method. Through the literature library, library collection and the Internet and other channels, the collection of relevant works, literature, papers, research reports and analysis[7-12].
Case study and SWOT analysis. By selecting representative Tencent games in China's game industry, this paper investigates the development and reform of Tencent games' overseas distribution operation strategy. At the same time, SWOT analysis is carried out to summarize the problems and development countermeasures of Tencent games and the publishing strategy of Chinese game industry.

3. TENCENT GAME OVERSEAS DISTRIBUTION STATUS ANALYSIS

3.1 Tencent Games Overseas Market Development Process

3.1.1 The First Stage
Tencent games are aimed at mobile and mobile gamers around the world. Tencent was not like a typical game company in the early days, and its many mass casual games were not mainstream compared with the medium and heavy games that core Chinese game players were keen on at that time. However, it has accumulated a large user base through casual games, and gradually transitioned to medium and heavy games with the foundation of the whole people (See Figure 1).
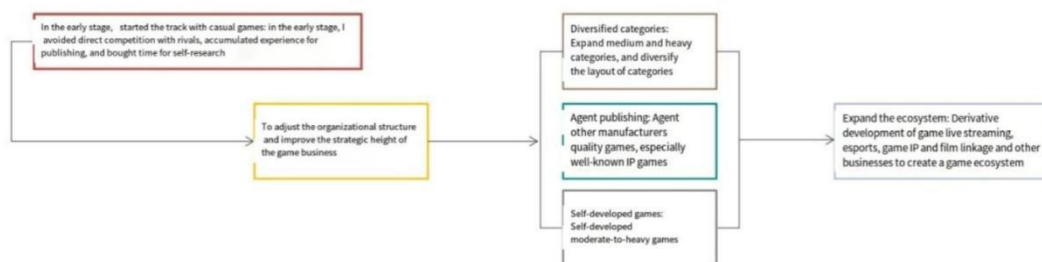

Figure 1 Organizational structure of Tencent game business
Data source: Founder Securities

In 2005, Tencent Games took a stake in South Korea's GoPets. In 2011, Tencent Games took a stake in Riot Games, and soon after developed League of Legends, which became a global hit. Before 2021, the main strategy of Tencent Games to develop overseas markets is to exchange capital for shares, and quickly layout overseas markets by binding overseas well-known IP and mature mobile game content. Over the past ten years, Tencent Games has invested extensively in and acquired more than 100 game enterprises around the world. Tencent accounted for three-quarters of the $22 billion in acquisitions and investment in the global gaming market in 2017-2018. In 2021, Tencent invested in another 61 gaming companies with a total amount of more than 18.6 billion yuan.

3.1.2 The Second Stage
In December 2022, Tencent Games launched the overseas distribution brand Level Infinite (hereinafter referred to as LI). The establishment of LI solves the problem of the separation of R&D, promotion and operation of multiple internal departments, establishes IEGG and global distribution platform, and takes an important step out of globalization with "system". Taking the potential Latin American market as an example, Tencent announced in early June 2022 that it would open an office in Brazil and set up a local business team. In addition, it hired the head of market development in

the Americas from Garena, the Sea game division, to lead its game business in Brazil. The second is to output more categories of self-developed games[13-16]. So far in 2022, LI has launched a total of 9 games in overseas markets, with diversified game types and overall moderate to heavy. Third, accelerate the entry into the console market. Although mobile games are still overwhelmingly mainstream, the global game industry is increasingly emphasizing portability and versatility across console, PC and mobile platforms. Tencent has also invested in many console and PC games before, a pace that accelerated significantly after LI's establishment. Tencent disclosed in its financial results for the third quarter of 2022 that in September 2022, the total number of daily active accounts of adult users of computer games and mobile games achieved double-digit year-on-year growth, and the total time spent by adult users of computer games and mobile games achieved single-digit year-on-year growth (See Figure 2).

Figure 2 Tencent online game revenue and growth rate
Data source: Founder Securities

3.2 SWOT Analysis of Tencent Games' Overseas Market Development

3.2.1 Strength

The scale of the Chinese market is huge. As a local game company in China, Tencent Games can take advantage of the huge domestic market scale, number of users and game market experience, and use the expansion in overseas markets. That could help Tencent quickly build brand recognition and commercial scale in new markets[17-21].

Rich game product line. Tencent has many best-selling games in the field of games, covering all kinds of game types and gameplay, such as League of Legends, PUBG, Honor of Kings, etc. In recent years, it has also continuously launched new games, which can help Tencent Games build its brand in overseas markets (See Figure 3).
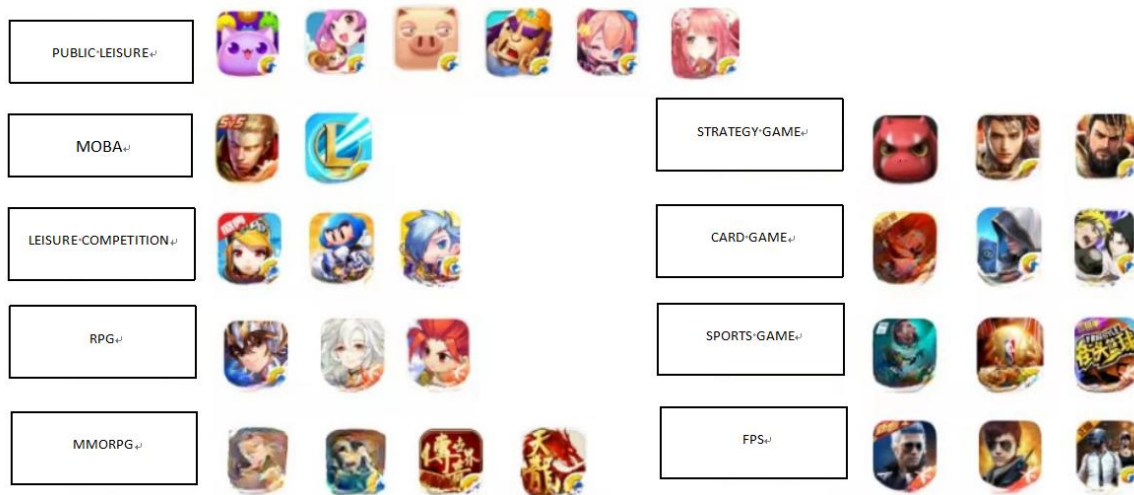

Figure 3 Tencent games in multiple categories
Data source: Founder Securities

Actively layout overseas markets. Tencent Games has gradually expanded its influence in the overseas game market through investments and acquisitions. For example, Tencent Games has acquired well-known game companies such as Supercell, Epic Games and Riot Games, and invested in overseas game companies such as Activision Blizzard and Ubisoft.

3.2.2 Weakness

The engine is costly and difficult to develop. Engine is the core technology of online game operation, but also the key competitiveness of game enterprises in overseas markets, and is an important factor affecting players' game loyalty. For now, Chinese gaming companies, including Tencent, typically use commerce engines. UE engine is the most commonly used commercial engine for most enterprises to go abroad for large-scale game projects, but the licensing cost accounts for 5% of the total flow, which is too high. However, the domestic self-developed engine is not yet mature, and the gap with the international top commercial engine is still very large.

Product homogeneity and lack of original IP. Tencent's many game products in the overseas market homogenization phenomenon is more serious. That leaves Tencent facing strong competitors in overseas markets, such as Steam and Epic Games. Tencent lacks independent intellectual property rights in overseas markets, such as independent innovation and game IP with certain brand influence, which makes it difficult for Tencent to gain a leading position in overseas markets.

Differentiation of operation style. There are great differences in cultural habits between the overseas market and the Chinese market, so Tencent may need to make improvements in operation and marketing, such as localization of game content and diversification of publicity channels, so as to find a balance between localization and globalization.

3.2.3 Opportunity

National policy support. In recent years, the Chinese government has adopted a number of policy support measures for the game industry and issued a series of rules and regulations, such as the Notice on Printing and Distributing Opinions on Promoting Innovative Development in the Field of Digital Culture and other documents to promote innovative development in the field of digital culture[22-26]. Some city governments have created digital economy industrial demonstration zones to attract high-quality game enterprises to settle down and encourage their development through preferential policies, technological innovation and financial support. In addition, the government will further strengthen its support for listing and financing in the game industry and encourage excellent game enterprises to go to the capital market.

The scale of overseas market is huge. The overall size and development potential of overseas markets are huge, providing ample business opportunities. Tencent can use its advantages and name recognition in China's gaming market to gain more users and market share. As shown in the figure below, in recent years, the marketing revenue of China's self-developed games at home and abroad has maintained a growing trend.

Diversified market demand. There are huge cultural differences in the game market in different countries and regions, and there are also diverse user needs of different types, age groups, and genders in the same country or region. Tencent can develop and promote games according to different market characteristics and user needs.

Many opportunities for copyright cooperation. There are also different copyright cooperation opportunities in the overseas market from the Chinese market, such as cooperation with overseas game manufacturers and well-known ips, which will help Tencent gain more market share and revenue in the overseas market.

3.2.4 Threat

International competitors. In overseas markets, Tencent games also faces threats from international competitors such as Nintendo of Japan and Activision Blizzard of the United States. These companies have strong influence and brand recognition in overseas markets and cannot easily gain a leading position.

There are great risks in overseas policies, and the copyright protection problem is still serious. The policy and legal environment in overseas markets is complex and unstable, including politics, economy, culture and other aspects, which may hinder Tencent games' development in overseas markets. The main form of online game infringement is still piracy, private service and plug-in, so copyright protection is still very severe. In less developed regions, pirated games are less expensive to produce, less risky to sell, and therefore more profitable. This makes pirated games more prevalent in these regions. In South America and the Middle East, complex links between piracy vendors and copyright authorities lead to unauthorized business transactions and unfair competition, making copyright protection a difficult topic to talk about due to inadequate market regulation[27-33]. Due to the different levels of development, history and culture between different countries or regions, the international copyright protection organization is not clear about the legal provisions of online game copyright protection, so that international copyright protection disputes often occur.

Emerging technology threats. With the development and popularization of new technologies, such as cloud gaming and 5G technology, these technologies will bring new user habits and game market potential, and may have an impact on the traditional game market. Therefore, Tencent needs to continuously improve its competitiveness from the perspective of technology and product research and development (See Table 1).

Table 1 SWOT Analysis of Tencent Games' Development in Overseas Markets

SWOT analysis of Tencent Games' development in overseas markets	
Strength	1. Huge scale of the Chinese market 2. Rich game product line 3. Actively layout overseas markets
Weakness	1. The engine is costly and difficult to develop 2. Product homogeneity and lack of original IP 3. Differentiation of operation style
Opportunity	1. National policy support 2. The scale of overseas market is huge 3. Diversified market demand 4. Many opportunities for copyright cooperation
Threat	1. International competitors 2. There are great risks in overseas policies and the copyright protection problem is still serious 3. Emerging technology threats

4. THE DEVELOPMENT PROBLEM OF TENCENT GAME IN OVERSEAS MARKET

4.1 Fierce Competition in the International Market

As China's gaming market has become saturated, companies like Tencent have begun to expand their businesses overseas, but that also means they need to face more fierce global competition. In Europe and the United States, there are many local competitors, such as Electronic Arts, Activision Blizzard and Ubisoft, while in Asia, there are game giants such as Japan and South Korea.

4.2 Foreign Exchange Control and Policy Risks

Currently, many countries and regions in the world have different standards for reviewing game content. For Chinese game companies such as Tencent, these issues need to be fully considered to ensure that their game content complies with local regulations and cultural requirements. Many countries have certain restrictions and censorship on the entry of foreign enterprises, and some countries also have political and geopolitical risks, which will have a certain impact on the overseas business of Tencent and other companies.

4.3 Adjustment and Acquisition in Overseas Markets

In overseas market expansion, Tencent also faces problems such as market adjustment and company acquisition. In 2018, for example, Tencent bought a majority stake in European game developer Funcom, though not all of those acquisitions have been successful.

In general, although Tencent games has made a lot of progress and achievements in overseas markets, it also needs to face multiple problems and challenges, and needs to have a more comprehensive and scientific development strategy and planning.

5. TENCENT OVERSEARS MARKET DEVELOPMENT STRATEGY

5.1 Localization of Products

According to the market needs of different countries and regions, the product localization processing, including translation, cultural adaptation, review, etc. For example, Russia, Brazil and other populous countries have a single cultural identity of players, so the degree of market aggregation is high, which largely solves the difficulties of enterprises in market cognition[34-36]. As a result, game companies can more easily achieve established and large-scale product output in these markets, while reducing the difficulty of game development and gaining more players.

5.2 Looking for Partners

Look for opportunities to cooperate with local businesses or institutions in overseas markets to jointly promote their products. Cooperate with local peers to open joint distribution channels to help the game go overseas. With the rise of new media platforms, the attention of players is becoming more and more scattered, and the promotion and distribution channels of game products have developed from a single to a diversified one. Therefore, opening up the co-distribution channel can help games work better when they go overseas. By understanding the allocation of resources inside and outside the enterprise, we can use the resource replacement and joint distribution with domestic and overseas manufacturers to market the heat of local products in the overseas market, so as to promote the overseas progress of the game. In recent years, smartphone penetration has been rising in East Asia and the Middle East, while Chinese smartphone makers such as Huawei and OPPO have been expanding in these regions. Tencent can deeply cooperate with these mobile hardware manufacturers to quickly introduce its game products to the target market through advertising and application recommendations.

5.3 Adhere to All-round and Multi-dimensional Thinking of Cultural Integration

Develop new products based on local characteristics and culture: Develop new products that meet the tastes and needs of local consumers based on the culture, history, customs, social ways and other factors of the countries and regions where they are located. Companies need to re-examine and define the concept of cultural integration in game development[37]. In the process of cultural integration, it is necessary to deeply intervene and think about the ideology, social environment and living habits of the players in the target market, and consider and integrate them from multiple aspects and dimensions. Although the success of overseas games is affected by many factors, all-round and multi-dimensional cultural integration thinking plays an irreplaceable role in it. The seller's market thinking relying on domestic "traffic + channel" should be abandoned, and game R&D should not only look at the market from the perspective of games, but should look at games more from the perspective of market environment.

5.4 Focus on Product, Technology and Brand Building

In order to gain a better market share in overseas markets, a certain level of infrastructure and technology is required, such as the handling of local languages, payment methods and data privacy. Strengthen brand building and publicity: in overseas markets, strengthen brand building and publicity can enhance the grade and awareness of products. Use social

media, advertising, sponsored events, and more.

5.5 Expand the User Base

At present, Tencent games are in their infancy and mainly need to expand the user base to obtain economies of scale. In addition, accelerate the update and iteration of products in mature markets and further explore emerging markets. Even in mature markets, players still want the novelty of the game, so single-play games can't hold the market for long. In order to extend the sales cycle of Tencent games in overseas markets, it is necessary to give full play to the advantage of short product update and iteration cycle, and accelerate the update and iteration speed of products in mature markets in terms of game story, special effects, gameplay or expression, so as to improve user engagement and game playability.

In conclusion, Tencent games face difficulties and challenges in overseas market development, including homogenization, lack of original IP and other disadvantages; However, the company also has the advantages of a large Chinese market and rich products[38]. Meanwhile, the large scale of overseas market, diversified market demand and copyright cooperation opportunities provide opportunities. Tencent Games needs to balance localization and globalization, continuously improve technology and product research and development capabilities, develop more targeted marketing strategies, and further improve overseas market layout and operation management.

6. CONCLUSION

Based on the significance, current situation and development trend of Tencent games going abroad, this paper analyzes the challenges and opportunities encountered by Tencent games in overseas markets, and puts forward some strategies and suggestions for coping with market competition and developing overseas markets[39]. Although there will be some difficulties and challenges in the process of developing overseas markets, we believe that with the deepening of the global digital era, Tencent Games will achieve more brilliant results.

Tencent Games provides the following reference for other game enterprises in China:

1. Strengthen overseas market layout: With the advent of the global digital era, strengthening overseas market layout by setting up regional centers and offices overseas can provide reference for Chinese game enterprises to expand overseas markets.

2. Product development based on localization requirements: Different countries and regions have different regulations and review standards, and differences in language and cultural habits also need to be considered. Therefore, Chinese game companies should develop and adjust their products according to local needs and requirements.

3. Strengthen brand publicity and marketing: The international market is highly competitive, so Chinese game enterprises need to strengthen brand publicity and marketing, improve user experience and product quality, in order to attract more overseas players.

In short, Tencent's overseas game publishing strategy can provide reference for other Chinese game enterprises and help them gain better competition opportunities in the international market.

COMPETING INTERESTS

The authors have no relevant financial or non-financial interests to disclose.

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