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Ingrid Wong

Striking a Critical Balance: An Institutional
Analysis of Knowledge Production in the J-pop
and K-pop Idol Industries in Tokyo and Seoul



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Author Ingrid Wong, University of Toronto, Email: ingridjaye.wong@mail.utoronto.ca

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Abstract

Unlike other types of entertainment actors, J-pop and K-pop idols are multifaceted; beyond singing and dancing, they also appear on television dramas, films, variety shows, and advertisements. The idol industry is thus a thriving part of the cultural and creative economy. This paper uses cluster theory to highlight the importance of balancing local and global knowledge creation in the idol industries to maintain a sound level of competition through innovation and generate sustained economic growth. Without knowledge production, the J-pop and K-pop industries' competition and economic growth may stagnate. In comparative perspective, the paper investigates how the J-pop and K-pop industry have different structures and institutional conditions to create knowledge for economic growth: while J-pop in Tokyo has relatively more local collaborations, K-pop in Seoul has stronger global connectivity. The paper concludes that further empirical studies are necessary to unpack the relationship between the structure of local and global networks and economic development in cultural industry clusters.

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Striking a Critical Balance: An Institutional Analysis of Knowledge Production in the J-pop and K-pop Idol Industries in Tokyo and Seoul

1 Introduction

The international success of several East Asian cultural industries in the past 50 years, such as cinema, animation, and music, has highlighted the region's accomplishments in cultural exports. This is similar for the entertainment industries in Japan and South Korea (hereafter "*Korea*"). Mainstream J-pop and K-pop (short for Japanese popular music and Korean popular music, respectively) are known for their systematic and rigid organisation of all areas of production; its processes of selecting music and specific performers are highly conceptualised and calculated. Yet, innovation occurs even within these seemingly fixed structures. Both industries have gained and maintained great popularity, as evidenced in the staggering growth of K-pop in the 2010s with the tremendous popularity of Hallyu (translates into "*Korean Wave*"), and J-pop has continued to see high revenues although it peaked in the 1990s (Messerlin and Shin 2017; Ng 2004).

The advantages of similar firms being clustered in the Tokyo and Seoul regions has hardly been considered in looking at the idol industries. Literature on clusters has identified that clusters generally encourage innovation and economic growth. Malmberg and Maskell (2002) state that clusters reduce the costs of interfirm transaction because distances between firms are shorter, which helps create trust, increase spillovers, and stimulate knowledge creation. Porter (2000) claims that participants in clusters, including firms and governments, cooperate with each other and amplify peer pressure to appear attractive in the local community, which stimulates rivalry and supports the development of a competitive advantage. However, what is interesting is that different kinds of efforts are necessary to optimise the knowledge gained from local and global environments (Bathelt et al. 2004) and that clusters have unique conditions and strategies to generate both types of connections. Using cluster theory to analyse the J-pop and K-pop industries, this research paper will argue that industries, depending on their structure and conditions, need to sustain a healthy balance between local and global knowledge flows to generate sustained economic growth within their core locations. How then, do the idol industries in Tokyo and Seoul create knowledge for innovation, and how does this impact economic development? A study into the J-pop and K-pop idol industries is also informative for other cultural industries and its firms as a case study on how to generate a delicate balance between local and global connections. This paper examines local, regional, and international collaborations for innovation as an indicator of local buzz and global pipelines. It will use existing work on idol industries from various fields and reinterpret that work in terms of knowledge flows, interactions, and their effects, using a cluster approach.

The structure of this paper is as follows: the framework used to analyse the two clusters will be explained, highlighting the benefits of local buzz and global pipelines for clusters. Section two defines the idol industry and discusses the methodology used, considering that activities encompass multiple areas in the creative industries. Section three presents cluster theory as the framework to analyse the Tokyo and Seoul idol industries. Section four

takes a deeper dive into the East Asian idol industries. Sections five and six present how the Tokyo and Seoul idol industry clusters, respectively, utilise strategies of local and global networking in different ways to generate knowledge for innovation. The paper concludes with final remarks and suggestions for further research.

2 Definitions and Methodology

2.1 Defining the Idol Industry

An idol in the context of this paper is an East Asian individual in the popular music industry, typically in their late teens or early twenties, with appearances and personalities produced and dictated by firms catering to targeted audiences and markets (Keith and Hughes 2016). Idols are conventionally attractive, and beyond singing, can also dance and act – which separates them from other singers or music artists. This paper defines the idol industry as a group of organisations in the creative industries that “*manufacture*” idols to consumers, typically fans, as a form of entertainment. The creative industries involved in the idol industry include but are not limited to: music, film, television, fashion, marketing and advertising, and the entertainment industry more broadly. This paper will focus on organisations involved in the industry, such as talent agencies and production firms.

To some extent, idols are involved in the service industry. A defining characteristic of East Asian idols is the extent of intimacy within the idol–fan relationship, something that has “*no apparent equivalent*” in the Western music and idol industry (Aoyagi 2015). This is displayed through intimate handshaking and autograph sessions with idols, where fans can interact directly with idols to experience a more personal relationship. Fans typically pay a premium to interact with their favourite idol in such a manner, which generates an economic impact. Idols are reproduced through these interactions as they know that fans want them to act a certain way when meeting them, which ultimately creates positive feedback loops within the cluster, as explained below, through local buzz and economic growth triggers.

As a result, fans are seen as a key indicator driving economic growth in the idol industry. This is because firms produce idols to penetrate various aspects of fans’ lives through merchandise, often appearing in photo albums, fashion, and accessories (Galbraith and Karlin 2012). Idols deliver services to their consumers through music and are incorporated into products, thereby also representing a good themselves. Idols’ visual and physical characteristics are incorporated into these goods since fans are more likely to purchase products featuring their favourite idols, which reinforces the industry’s reliance on visual aesthetics. When considering idols as products, and fans as consumers whose attitudes can affect industry demand, the idol–fan relationship becomes significant in the industry.

Indirectly, idols’ emotional labour also creates positive feedback loops because fans desire to be understood by their favourites. Emotional labour refers to the act of expressing emotions in a social setting that requires the management of emotions through acting, meaning that the emotion an individual expresses may not necessarily represent how they feel (Hochschild 1979). As a constructed product by management firms, idols sing songs about growing up so that adolescent fans can empathise with their idols and feel like they are experiencing the journey of life together, minimising the mental distance between fan and idol (Aoyagi 2015). However, the reality is that the idol industry

is rigidly structured and manufactured, in that idols typically do not even write their own music (Epstein and Turnbull 2014). The role of idols as a “*service*”, the production of idols and the emphasis on emotional labour through singing and acting helps fans solidify their positive image of idols. The idol–fan relationship and associated social interactions are therefore important to reinforce positive feedback loops that support economic development within and beyond clusters.

2.2 Methodology

While the idol industry’s links to multiple related industries makes measuring economic output more difficult since there are many factors to consider, there are also other factors, such as the monetary effects of idols’ influence on merchandise and product placement sales, that have no standardised measure or are difficult to capture. In this paper, the idol industry’s economic performance will be measured by examining the monetary effects of music production, such as industry revenues, and also accounting for non-monetary indicators, such as the number of followers on social media platforms and the number of views from music videos on digital media distribution platforms. The latter capture the effects of the idol industry in a much broader way, including its visual aesthetics alongside auditory aesthetics. While this paper will focus on the idol industries in Tokyo and Seoul, statistics will be taken at the national level for Japan and Korea more broadly. The two idol groups are heavily concentrated in the form of two urban clusters, for which corresponding data is unavailable. The locations in Tokyo or Seoul will be used as a proxy to classify whether firms interact on local and global levels.¹ Furthermore, the creative industries rely heavily on interactions through informal networks, which are typically hidden and excluded in studies of their general development and trends (van Heur 2009). As a result, this paper will consider descriptive data through events to provide more context for the idol industries’ spatial interaction patterns.

3 Cluster Framework in a Comparative Analysis of National Idol Industries

3.1 Cluster Theory

Interactions between firms within a cluster can generate a competitive advantage and increase economic productivity. A cluster is a “*geographically proximate group of interconnected firms and associated institutions in a particular field, linked by commonalities and complementarities*” (Porter 2000: p. 16). It fosters healthy competition due to informational, transactional, incentivised interactions and stimulates regional economic development (Porter 2000: 16). Due to commonalities and complementarities, clusters include firms across various industries. Porter uses the California wine cluster as an example, which includes players such as wine grape growers, equipment suppliers, public relations and advertising firms, and also has weaker linkages to local agriculture, food and restaurants, and tourism (Porter 2000). The idol industries have a similarly wide range of related industries that are often co-located.

¹ AKB48, one of Japan’s most successful idol girl groups in the past two decades, developed out of and is based in Akihabara district in Tokyo’s Chiyoda Ward (Kiuchi 2017). In Korea, the largest entertainment agencies, consisting of SM Entertainment, JYP Entertainment, YG Entertainment, and HYBE Corporation, all operate in Seoul.

Geographical proximity reduces transaction costs in interactions between firms in clusters (Malmberg and Maskell 2002) and stimulates increased knowledge spillovers. Termed as local buzz, knowledge and information are exchanged within a cluster through the shared presence of both employees and firms in the same technology field, place, and/or region in coordinated and uncoordinated ways (Bathelt et al. 2004). Communication networks and knowledge flows in a successful cluster are often spontaneous and fluid. They can occur during organised negotiations between two firms, or even in a casual setting like at a lunch or taking a phone call (Bathelt et al. 2004). Such communication benefits clusters because competition emerging out of these conversations forces firms to work with and against each other to generate economic growth.

Porter (2000) lists numerous ways clusters generate competitive advantage: increasing productivity within firms, increasing capacity for innovation within the cluster, and stimulating new business strategies which support growth. The increased access to knowledge, especially about competitors' products and strategies, stimulates the improvement of existing and development of new products which helps reach more consumers and new markets. Such knowledge spillovers from their competitors often occur through informal linkages (Storper and Venables 2004). Furthermore, clusters can facilitate better coordination through complementarities because firms in related industries can collaborate effectively (Porter 2000). Clusters therefore generate economic benefits for participating firms due to the way how local firms interact and connect with each other.

Despite these benefits, clusters can also stagnate or even shrink if there is little competition to stimulate innovation, or if firms choose not to interact with each other. When there is not enough pressure on firms to compete, there may be a lack of differentiation and "*groupthink*" may suppress creativity and the development of new ideas (Porter 2000; Malmberg and Maskell 2002). Even though competition in clusters can force firms to take risks and have negative impacts, the absence of competition may cause homogeneity in firms' approaches with negative regional impacts.

To prevent economic stagnation related to a lack of diverse ideas, global pipelines – which expand beyond the local cluster – are crucial to boosting economic development by bringing in new ideas and demand. Global pipelines refer to knowledge acquired through strategic partnerships beyond the local sphere based on regional and international interaction beyond the clusters (Owen-Smith and Powell 2004). Unlike local buzz, which is generated through a mix of formal and informal relationships, global pipelines are more calculated and intentional. This is because firms strategically reach beyond the cluster to contact other firms, which is typically more costly and time-consuming because trust needs to be established between organisations involved in the process (Bathelt et al. 2004). Global pipelines can also strengthen competition within the cluster because new knowledge gained and introduced to the cluster can trigger differentiation efforts by local firms (Bathelt et al. 2004). The significance of global pipelines is that even if knowledge flows within a cluster are stunted due to low levels of local buzz, knowledge flowing in from outside the cluster can reinvigorate such buzz. All of this suggests that cluster may want to develop and sustain critical balance between local buzz and global pipelines. Since improved information and communication technologies have reduced the cost of knowledge exchanges across distance, barriers to constructing global pipelines in the form of strategic partnerships have been drastically lowered in the past decades (He et al. 2017). The internet also helped firms to expand their influence beyond the local geographic market (de Barranger and Meldrum 2000).

While local knowledge flows are almost natural in the formation of clusters, global networks are crucial as well. They are often created by individuals or communities who establish the connections between places and establish businesses in different locations and develop institutional settings to accommodate knowledge flows between them (Saxenian 2006). Immigrant and transnational entrepreneurs can even spawn cluster emergence through the integration of distant knowledge ecologies by slowly developing local networks and establishing new pipelines (Henn and Bathelt 2018). Generally, these entrepreneurs facilitate the development of a cluster due to their social networks across multiple regions and countries, and their ability to transfer knowledge over distance (Henn and Bathelt 2017). Transnational entrepreneurs with qualities to create and sustain innovation and economic growth across national boundaries have played an important role in Asian cluster formation (Yeung 2009). As will be shown in the case of the Japanese and Korean idol industries, transnational entrepreneurs experienced the development of music and entertainment markets in their host country and identified opportunities to transport and adapt trends from abroad to their home context. As such, they created global pipelines to strengthen and enrich existing local buzz.

3.2 Existing Research on Creative Industry Clusters

There is a considerable amount of research on how local buzz and global pipelines inspire knowledge creation within creative industries. Berg (2018) demonstrated how extra-local knowledge linkages help expand the Korean film and television industry and also promote Hallyu. Buchholz (2018) showed how zines act as a form of knowledge exchange for punks in the San Francisco Bay Area punk rock scene, where creativity is enhanced as a result of knowledge exchanges in local peripheries and across distances. Vang and Chaminade (2007) illustrated how global-local linkages impact the competitiveness of clusters in the Toronto film industry, emphasising that technological development helps the industry benefit from globalisation. Lin (2013) demonstrated the importance of historical contexts that structurally shaped the music industry cluster in Taipei and supported innovation synergies in the city. Several studies have also shown the importance of cultural industries and cultural policies for cities, with governments supporting these industries' development in the form of the "*Korean Wave*" (Berg 2018) or the "*Cool Japan*" national cultural strategy (Tamari 2017). Despite the plethora of research, few studies have analysed the idol industry, which hardly any other case encompasses a multiplicity of creative industries, and reaches into many other industries at the same time.

The cluster conception is used in this paper to compare the J-pop and K-pop idol industries in Tokyo and Seoul, respectively, as both clusters use a combination of local-buzz and global-pipeline knowledge environments to sustain growth, although this occurs to varying extents in both, thus leading to different results. Given the success of both J-pop and K-pop, I will explain how each cluster has been able to utilise local buzz and global pipelines to facilitate knowledge flows and contribute to economic success by the way of innovation. I also demonstrate in my analysis that specific characteristics in the Tokyo and Seoul clusters, such as institutional conditions, generate limitations for their development: J-pop caters more to its domestic market in Japan, while K-pop has more of an international reach, which affects social interactions and strategies within and beyond each respective cluster.

4 East Asian Idol Industries

4.1 Characteristics of the Japanese and Korean Idol Industries

K-pop and J-pop differ from other types of music, especially in conventional Western settings, because it relies less on auditory aesthetics but heavily depends on visual aesthetics like an individual's or group's physical complexion and dance abilities (Shin 2017). To focus solely on the music industry to explain the success of K-pop and J-pop would therefore be inaccurately capturing the full impacts of the respective idol industries.

The Japanese music industry has a mix of both physical and digital content sales, but the overall trends indicate a move towards the digital realm. Japan is the second largest music market in the world, only behind the United States (IFPI 2021). In 2020, the Japanese music industry saw a total production value of 194.4 billion JPY (Japanese yen, equivalent to 1.9 billion USD), including an 11 per cent increase in digital sales (RIAJ 2021). Despite the growth of digital music in Japan due to the rise of digital streaming services, CD production continues to influence the industry with a value of 96.3 billion JPY (935 million USD), making up almost half of total production value in the music industry (RIAJ 2021). With that said, the overall sales revenue for audio recordings, music videos, and digital downloads has shrunk in revenue by 92 billion JPY (893 million USD) from 2012 to 2020 (RIAJ 2021).

In contrast, the Korean music industry is more focused on digital sales and has a much smaller domestic market. With a total population of 51.8 million, firms are compelled to look internationally to grow and diversify their audience. The Korean music market is the sixth largest in the world and was largely unaffected by the COVID-19 pandemic, seeing a 45 per cent revenue growth in 2020 compared to the previous year (IFPI 2021). In 2019, music industry exports from Korea were valued at 756.2 million USD (Statistics Korea 2021). Digital music is dominant in Korea, with 88 per cent of the population using smartphones to listen to music (KCCA 2021). The popularity of digital music was reinforced by total sales of the Korean music industry in 2019, when online music distribution saw a spike in total sales by 1.84 trillion KRW (South Korean won, equivalent to 1.59 billion USD), in contrast to 200 billion KRW (173 million USD) in physical record distribution sales (KCCA 2021).

4.2 Related and Supportive Industries

Beyond music, the idol industry also includes other aspects of the broader entertainment complex due to the linkages idols develop during their career. Many idols begin their career as a music artist and then expand into other branches of the industry based on their skillset. These can include appearing in films and television shows with their acting skills, or in variety shows with their hosting skills and unique personality and charm which attracts viewers. Idols' involvement has even extended into the gaming industry as well, with members of K-pop girl group (G)I-DLE participating in K/DA, a girl group composed of characters from the video game League of Legends (Purslow and Cardy 2021). The game is developed and published by Riot Games, a firm with Korea as one of its most important markets (Purslow and Cardy 2021). Idols' participation across a variety of media allows fans to embrace Korean and Japanese popular culture beyond what they are already exposed to through positive feedback loops within the cluster, thereby increasing economic growth in the entertainment industry.

Many entertainers are recruited within the advertising industry because their status and produced image creates beneficial gains for advertised products and their firms. While it appears that celebrities are promoting products, commercial advertisements promote the celebrities as well, as fans are the consumers of idols. Advertisement statistics are often noted without citations, but an estimated 70-75 per cent of Korean advertisements featured celebrities in the 2000s (Fedorenko 2014), and an estimated 50-70 per cent of Japanese commercials also featured a celebrity (Karlin 2012). These estimates demonstrate the advertising industry's heavy reliance on entertainers (especially idols) to promote products. The industry in East Asia also employs ambiguous imagery to appear less advertising-like (Fedorenko, 2014), choosing to focus on the idols instead of the products. It implores fans to use their prior knowledge of the idol to read between the lines and consume the product they endorse, demonstrating the power that the advertising and idol industry have on consumers. The relationship between an idol and the product that they endorse aims to create a sense of brand loyalty to fans, or in this case, potential product consumers, by closely associating the idol with the product (Karlin 2012).

Since the advertising industry to a large degree relies on idols to ensure that products sell, the industry becomes important for idols too. In essence, there is mutual benefit for both the (firm of the) idol and the endorsed product. Marketing managers consider how a celebrity's image can project onto a brand's outlook; in Japan, contracts for top celebrities cost between 50 to 100 million JPY (538 thousand to 1.08 million USD) in 2009 (Karlin 2012). In return, both the celebrity and product gain exposure when fans post about these endorsements on social media and blogs (Karlin 2012). When a commercial for Nintendo's 2010 "*Wii Party*" video game was released online and then broadcast on national television featuring J-pop boy group Arashi, its sales rankings on Amazon Japan jumped from #68 to #15 and #5 on June 24th and June 30th, respectively (Karlin 2012). This highlights the power of celebrity endorsement on brands and their products – a co-dependency for economic growth that allows celebrities to also maintain fan loyalty.

5 J-pop Industry in Tokyo

5.1 Industry Structure and Conditions

J-pop refers broadly to Japanese popular music; it does not refer to any specific genre, but rather caters towards audiences in Japan by encapsulating a variety of genres. While it has roots in Japanese traditional music, J-pop has global roots as well. Johnny & Associates² was one of Japan's largest entertainment firms founded by an American-born Japanese man in 1962, and organised what is known to be one of Japan's first idol groups in the same year (Chun 2017). arrived in Japan during the Korean War to work for the United States embassy, but later transitioned into the entertainment industry – an example of the United States' cultural influence in Asia (Chun 2017; Tamari 2017). The inspiration for an idol group in Japan materialised out of their roots in Los Angeles, but it needed to localise/customise American trends to fit the Japanese audience. The establishment of the J-pop idol scene in Japan

² As of October 2023, Johnny & Associates has been renamed to SMILE-UP and no longer operates as a talent agency due to a sex abuse scandal by the founder and former President; a new independent firm is being set up to take over clients and performers of former Johnny & Associates (Kageyama, 2023).

is an example of cluster formation triggered through distant knowledge (Henn and Bathelt 2018) since the founder chose to capitalise on the potential future of the Japanese idol market.

The idol system and its organisational model was invented in post-war Japan during the 1960s and was created with a strong step-by-step structure to systematically produce idols. Under the jimusho (Japanese for “office”) system, promotion agencies and management firms worked together to control the process of producing a J-pop idol, which includes: scouting talent, coordinating artistic content, production and concerts, long-term market planning, negotiating contracts with record labels and media, and organising fan clubs (Shin 2017, 18-19). Shin (2017) emphasises that firms within this system are small and have limited access to capital, but are able to exert control through keiretsu structures, which are extensive informal network ties that are formed when independent firms “cluster into informal business groups” – involving and creating local buzz (18-19). The jimusho system’s success is indicated by the rise of J-pop in Japan and idol music in East Asia more broadly, as well as a consolidation of the system in the region. As will be shown below, Tokyo’s business systems and reliance on the domestic market and resources leads to a heavier emphasis of local buzz in the cluster.

Despite the presence of local buzz through keiretsu structures, the way firms interacted with each other tended towards a uniform approach where most firms acted with similar strategies, which likely made it more difficult for innovation processes to occur in the cluster. Keiretsu structures created a heavy oligopoly within the industry in Tokyo because only the top jimusho firms were able to showcase entertainment on major television shows and commercials (Marx 2012). Although local buzz supported knowledge flows in the industry, the oligopoly among top firms hampered smaller firms developing new ideas, likely limiting their economic success.

As J-pop became more popular in the 1980s, fans became increasingly important to the success of the industry. While idols were traditionally expected to perform, they became an important medium to organise audiences into three categories for promotion: television, music, and advertising (Galbraith and Karlin 2012). Idols started to sign more contracts to be broadcasted in television dramas, made more appearances on music shows where they promoted their songs, and started working with corporate brands to endorse consumer products (Galbraith and Karlin 2012). In essence, they became principal figures in Japanese public media, solidifying their presence for localised programming. Due to their success in the domestic Japanese market, idol firms had fewer incentives to seek further economic growth in other Asian or global markets.

Overall, the large domestic market thus hampered potential economic growth as it did not incentivise collaboration with players in the international market. This was the case for CD production, which remains a significant portion of revenues in the Japanese music industry. When the rest of the world was responding to the rise of the digital market by digitising music production, the Japanese music industry continued to rely on CD production and other means of physical distribution since it was popular in Japan (Shin 2017). This is not to say that Japan never attempted to expand abroad but early expansions in the international market in the 1990s created losses for the J-pop industry (Shin 2017). This was attributed to several factors: a slump in the Japanese and Asian music industry, K-pop’s rise, the end of the Japanese drama boom, and product piracy issues (Ng 2004). As a result, the J-pop industry was late to adopt technological changes associated with a lack of global pipelines, and its strong focus on catering to Japanese consumers in the domestic market.

Despite a decline in the global CD production market in the 2000s, the Tokyo idol industry utilised CD production to sustain itself. AKB48 is one of Japan's largest girl groups and ranks its members through elections; fans helped boost CD sales in Japan because each unit sale was used as a "*ballo*" to vote for a group member (Kiuchi 2017). Moreover, AKB48 also pioneered the concept of using CD sales to redeem other benefits, such as tickets to concerts and handshaking events, which incentivises fans to purchase more CD units (Jin 2020a). The widespread success of CD sales across Japan as a growth strategy demonstrated knowledge transfers, likely encouraged through local-buzz networks spilling from AKB48's firm into other firms and creating competition between entertainment firms within the Tokyo cluster. All of this had a much broader impact also on the Japanese consumer electronics industry.

Tokyo's idol industry cluster structure, such as the jimusho system and keiretsu structures, and institutional conditions, such as the large domestic market and consumer/fan preferences, led it to focus on creating knowledge flows primarily through local buzz. Since the Japanese market delayed its transition into digital music, the cluster missed out on potential economic activity, showing the importance of balancing local buzz and global pipelines.

5.2 Current Industry Landscape

When conducting research on entertainment firms in Tokyo, including talent agencies and production firms, I found that 24 of 52 firms identified were based in Shibuya, with Minato (10), Chiyoda (6), and Shinjuku (5) demonstrating a significant share of firms as well. Of the 52 firms, 17 publicly displayed the number of employees at their firm with a total of 7,825 employees, ranging from 5 to 3,700 (Table A.1). It is important to note that the total number of people involved in the Tokyo idol industry cluster is much larger, given that only a third of relevant firms provided data on their official website and that the cluster encompassed many related and supporting businesses. However, some firms are also conglomerates or major firms involved in other industries, such as Avex and Sony Music Entertainment.

Despite the emphasis on local buzz in the past, firms in the cluster today are creating new knowledge flows by shifting strategies. AKB48's creator, Yasushi Akimoto, has changed the production and distribution process by organising sister groups in other Japanese and Asian cities, like NMB48 in Osaka and JKT48 in Jakarta (Kiuchi 2017, p.34). The significance of these groups outside the cluster is that AKB48 is able to learn from trends outside of Tokyo's knowledge ecosystem with strategic partnerships and networks through global pipelines. The sister groups are also considered to be an extension of the AKB48 project, helping it gain greater popularity, thereby increasing economic success (Kiuchi 2017, p.34). Knowledge spillovers occur during coordinated events between AKB48 and their sister groups based on interactions and analysing which specific strategies have been successful across each group. The Japanese music industry has seen growth in digital music and a decline in CD production in recent years, demonstrating a shift in the industry that aligns with global trends (RIAJ 2021). Despite the imbalance with respect to global pipelines in the Tokyo idol industry cluster, collaborations with idol groups outside the cluster creates new knowledge flows, which leads to triggers in innovation.

Japanese entertainment firms are now making elaborate efforts to create global partnerships with organisations beyond the Tokyo cluster, leading to higher exposure for Japanese idols beyond the domestic market. Produce 48 is the third season of Produce 101 – a Korean competition show where trainees (idols-in-training) competed to gain a spot to debut in the idol group IZ*ONE. Of the 96 potential girl group members, half were Korean trainees, while

the other half were Japanese idols from AKB48 and its regional sister groups from all over the country (Herman 2018). The first teaser for the show was released on April 11, 2018 on YouTube, and the show ended August 31 that year when the final contestants were selected to be in the group. During the show, Japanese trainee Hitomi Honda was a part of AKB48 and had 34,500 followers on Instagram on July 7 (Honda Hitomi 2018). Honda ranked 9th in the final episode of the show and debuted in IZ*ONE in October 2018. After her debut, Honda's Instagram following reached 313,000 followers in March 2019 (Honda Hitomi 2019). The growth in Instagram followers demonstrates the impact and reach of strategic partnerships abroad. After IZ*ONE's disbandment in 2021, Honda returned to AKB48 and was selected as the centre idol for a 2022 single (Tokyohive 2022) and has 1.4 million Instagram followers as of November 2022 (Honda Hitomi). The exposure gained from the collaboration infers that global pipelines have been very beneficial for the growth of the J-pop idol industry.

It appears that local buzz continues to drive technological innovation. The emergence of vocaloids – virtual characters that are developed using voice synthesiser software – and virtual YouTubers (VTubers) have been highlighted to rethink the industry as virtual idols become increasingly popular. Vocaloids such as Hatsune Miku emerged as a novel model when the recording market was in global decline (Condry 2017). Kizuna AI is a virtual YouTuber created by entertainment firm Activ8 in 2016, who designed the character by modelling the characteristics of Japanese idols, such as offering fan services by participating in social media challenges (St. Michel 2022). Before her hiatus, Kizuna AI also launched a music career, making her a J-pop idol herself (St. Michel 2022). The VTuber market has proliferated in Japan, with a growing number of firms that have capitalised on the trend and modelled their firms using the jimusho system (St. Michel 2022). The benefits of virtual idols are undoubtedly clear: firms no longer need to worry about their idols making mistakes that could cost them revenue in music sales or commercial advertisements and sponsorships. Such an innovation expands the boundaries of an idol by eliminating the human aspect, and accelerates creativity since firms are encouraged to create something new to get ahead.

Players in the cluster have also shifted industry conditions in recent decades and created new knowledge flows for innovation. The Japanese government has become involved in pushing boundaries for knowledge creation through its creative economy policies. The *"Cool Japan"* initiative has been developed since 2000 with the aim to recreate Japan as a global cultural power (Tamari 2017). This cultural policy has been supported by the Tokyo government, which sees the value of using the city's *"historical tradition of cultural and intellectual creativity in order to increase competitiveness in the global nation brand market and enhance Japan's presence in the world"* (Tamari 2017). In essence, idol industry firms have the Japanese government's support in establishing more global pipelines using national cultural policies and guidelines. Even though idol industry firms in Tokyo have generated more global pipelines in recent years, the government's support should also be considered in the industry's formation of global pipelines.

The J-pop industry in Tokyo found initial success through its large domestic market. With an estimated population of just over 125 million as of late 2021 (Statistics Bureau of Japan 2021), the substantial consumer base and strong keiretsu business structures helped J-pop sustain the industry's popularity through CD sales. This ultimately influenced the industry to focus its efforts on creating local buzz to support the domestic market. However, technological advancements, emerging from digitisation, sent traditional sales into decline to leave the idol industry in a lull. Despite this, the cluster continues to create new knowledge flows through local buzz and global pipelines and a better balance between local buzz and global pipelines has been achieved in recent years.

6 K-pop Industry in Seoul

6.1 Industry Structure and Conditions

Korea's start to the idol industry is similar to the origins of the J-pop idol industry. Large entertainment firms, like SM Entertainment, JYP Entertainment, and YG Entertainment, looked beyond Seoul to refine the idol production system to fit the needs of local audiences. Like the J-pop idol industry, transnational entrepreneurs contributed to the emergence of the K-pop idol industry cluster due to distant knowledge ecologies. SM Entertainment founder Lee Soo-man had multiple careers in the entertainment industry, and having spent time in the United States, he incorporated procedures that would cater towards the Korean consumer base and also expand beyond its relatively small domestic market (Shin and Kim 2013). These included expanding systematic recruitment overseas through global auditions to hire potential artists of non-Korean ethnicity or from the Korean diaspora (Shin and Kim 2013). Realising its smaller domestic market, players in the K-pop industry knew it needed to expand beyond its borders if it wanted to expand its audience and boost revenue. The small Korean consumer market put pressure on firms in the Seoul cluster to turn globally starting in the early stages of K-pop. This set up the foundations for easier pipeline creation later, which is demonstrated below by investigating the reliance on international partnerships.

Korean conglomerates, also known as chaebols, have a major influence over the national economy, including the entertainment industry. Chaebols are a small number of large heterogeneous business groups, usually family-led, that are involved in many industrial sectors and attempt to vertically control entire production processes (Shin 2014). As a result, chaebols have been criticised as being monopolistic and sources of political corruption due to their intimate relationship with the government (Frater and Ravindran 2022). This is the case in the entertainment industry as well. After a period of media censorship under Chun Doo-hwan's dictatorship in the 1980s, the new democratically-elected government and the repealed Basic Press Law which removed the previous censorship – both of which occurred in 1987 – helped chaebols maintain their dominance over the economy (Shin and Kim 2013; Whitley 2016). While it is difficult to argue that the CJ Group conglomerate has a monopoly over the Korean entertainment industry through its entertainment division, CJ ENM, their contributions to the industry are significant. These range from hosting events like the MNet Asian Music Awards across East and Southeast Asia to international KCON conventions to celebrate the success and widen exposure to K-pop, as well as partnering with over a dozen entertainment firms for music distribution and management (Herman 2021). While chaebols assist economic activity in Korea, their dominance in industrial sectors can impact knowledge creation in the cluster since local knowledge spillovers may be deterred by the small number of large firms that influence the industry.

Vertical integration is common business practice due to chaebol influence in Korea. Rather than coordinating between firms focused on a single process, Korean firms prefer to vertically integrate the production process, meaning that most aspects of idol production are managed in-house (Shin and Kim 2013). This is known as the K-pop formula (Shin 2019) and includes aspects ranging from talent discovery and training to music production, recording, marketing, and management. Integration can also appear in the form of a larger firm taking ownership of smaller firms, as is the case for HYBE Corporation. HYBE Corporation is best known for debuting and managing BTS, one of the most popular boy groups in the industry, but in the 2020s has acquired other entertainment firms

in a collaboration with CJ ENM, including well-known firms such as Source Music, Pledis Entertainment, Koz Entertainment, and Belift Lab (Herman 2021). Through vertical integration, local buzz between larger firms may remain limited because production processes tend to stay within the corporate network. However, local buzz may still be sustained even in large corporations because the barriers to knowledge spillovers are lowered when subsidiaries are united under the same corporation, acting as a network of smaller firms to collaborate with each other.

The introduction of democracy and removal of censorship were significant for the music and emerging idol industry in Seoul. Many liberal and democratic changes were made during the late 1980s; the freedom to travel within Korea, freedom to interact internationally, and the newly liberalised economy helped to transition the national economy from a centrally-planned to market-oriented one (Shin 2019). Even with chaebol influence in the idol industry, pioneers such as Lee in SM Entertainment were able to innovate as a result of global influences. Lee used his experiences in the United States as an example of how to introduce K-pop in Korea, taking inspiration from MTV music videos and genres like hip-hop and reggae, and also used Japanese equipment to create music (Shin 2019). In essence, the origins of the Seoul idol industry cluster were a result of knowledge gained from external interactions, which was then customised to domestic market needs.

The presence of global pipelines and the need to build networks and alliances beyond the Korean domestic market helped create new knowledge flows between entertainment agencies in Seoul. In 2000, SM Entertainment established a joint venture with Avex Group in Japan – one of Japan's entertainment conglomerates, and then established American and mainland Chinese subsidiaries (Shin and Kim 2013). Subsequently, other Korean entertainment agencies also established strategic partnerships, such as YG Entertainment's YGEX with Avex Inc. in 2011 and YG USA and YG Hong Kong in 2012 (Shin and Kim 2013). The increased collaboration from strategic overseas partnerships forces firms to actively engage in innovative processes to sustain economic growth and revenue. In contrast to Japan, the perceived initial disadvantage of having a smaller market benefitted the K-pop idol industry in Seoul because it forced entertainment agencies to look beyond cluster borders for ideas to expand its audience and boosted economic growth by maintaining a competitive environment through balanced levels of local buzz and global pipelines.

There are additional benefits to tapping into international networks and alliances; observing and keeping pace with global trends prevents the K-pop industry in Seoul from losing its competitive edge. While part of the reason why the industry looked towards international markets may be attributed to the devastated local economy after the 1997 Asian Financial Crisis and subsequent bailout by the International Monetary Fund (Kim 2017), K-pop entertainment agencies capitalised on upcoming shifts within the idol industry by staying informed with global trends and marketing themselves to international audiences. In the early 2000s, the rise of internet platforms and digital distribution allowed firms in Seoul to expand K-pop beyond its national borders (Shin 2019). Even despite losing revenue in album sales to product piracy and lack of copyright protection, it has made the idol industry more resilient to shifts in trends, allowing entertainment agencies to easily re-strategise during the rise of social media platforms like YouTube in distributing and promoting K-pop (Shin 2019). This is in contrast with the Tokyo idol industry which was unable to utilise global pipelines to the same degree.

6.2 Current Industry Landscape

The consumer base for K-pop has continued to grow as a result of drawing international audiences to make up for their relatively small domestic market, gaining fans from Japan and Southeast Asia in the early 2000s, to the rest of Asia and other parts of the world in the late 2000s and 2010s (Messerlin and Shin 2017). Like Tokyo, the idol industry in Seoul is concentrated in certain districts. Of 40 entertainment firms in the city, 21 were based in Gangnam district, with Mapo (7) and Seocho (4) being districts with a significant share of firms (Table A.2). Although almost half of all firms are based in Gangnam, an interesting observation is that larger entertainment firms are primarily located outside the district: SM Entertainment is based in Seongdong, while JYP and YG Entertainment are based in Gangdong and Yeongdeungpo, respectively. Furthermore, conglomerates involved in the entertainment industry, such as CJ ENM, are located in Mapo. The fact that larger firms and conglomerates are located outside Gangnam suggests that they can afford to create global pipelines, in contrast to smaller firms based in Gangnam. Nonetheless, smaller firms still benefit from global partnerships that larger firms create due to knowledge spillovers and informal networking through local buzz, boosting the entire cluster.

The K-pop industry has been successful in capitalising on global pipelines, taking advantage of knowledge flows from technological advancements and international networks. From 2006 to 2013, K-pop exports grew 17 times, with a mean growth of 62 per cent per year (Messerlin and Shin 2017). SM Entertainment's published successes on their website, of which many are related to knowledge gained from global pipelines; as of March 31, 2021, the firm had over 69.5 billion views on its YouTube channel, over 20 million audience members in attendance at worldwide concert tours, over 172 thousand applicants at global auditions, and over 1,500 music composers in its international network (SM Entertainment n.d.). These statistics demonstrate the impact of reaching beyond the cluster and into global markets. The firm's ability to create strong global production networks and audiences has led it to become a well-known name worldwide with a sales revenue growth from 284 billion KRW (239 million USD) in 2014 to 702 billion KRW (590 million USD) in 2021 (DART 2022). Its networks allow for access to a wider range of producers and media platforms like YouTube give its idols more exposure.

Even despite its deep intertwinement with global alliances, local buzz is maintained within the Seoul cluster as well. Production processes in K-pop have gone as far as globally contracting artists to compose music and choreography for idol groups, demonstrating the extent to which global pipelines have been established for increased knowledge flows and perhaps even questioning the authenticity of K-pop being Korean (Shin 2019). Nonetheless, local buzz has been sustained through smaller entertainment agencies that take on a unique perspective in their innovation processes. HYBE Corporation, the agency that manages BTS, created success through authenticity because idol members produce their own songs and lyrics which are "*suffused with social awareness and generational unease*" (Jin 2020b). This unconventional method of innovation within the idol industry not only creates new knowledge flows via novel concepts, but also maintains local buzz because other entertainment agencies may choose to experiment and popularise such ideas, putting pressure on these firms to continuously produce incremental innovation to gain a competitive advantage. Moreover, smaller agencies also produce music with more diverse musical styles, which demonstrates the ability for all actors in the Seoul cluster to participate in the innovation process (Shin and Kim 2013). This contrasts the Japanese oligarchic agencies where keiretsu structures made it difficult to introduce unconventional and innovative processes, thus dampening local buzz and competition within

the Tokyo cluster. The impact of smaller agencies also demonstrates that competition sustains in Seoul despite Korean chaebols and their desire to have full control over the industry.

Like Japan's "*Cool Japan*" initiative, the Korean government has also shown support for national cultural policies, which furthers knowledge flows in the cluster by adding a new player. The "*Korean Wave*" refers to the success of Korean popular culture exports internationally, including K-pop. With the boom in Korean exports in recent decades, some authors argue that Hallyu is a policy that was initiated by firms, and then later supported by the government due to the increase in Korean exports (Messerlin and Shin 2017). Such support may encourage individuals to participate in the industry and when more individuals transition into the idol industry from other or related industries, they will bring them relevant expertise and ideas, thus pushing the boundaries of innovation and placing pressure on the industry to continue with collaboration and innovation.

From its inception, the K-pop industry in Seoul realised the importance of reaching beyond its domestic market given its small consumer base. While its business systems made it more difficult for local buzz to occur, the idol industry has taken advantage of global partnerships and networks to remain competitive and up-to-date with international trends. The establishment of overseas subsidiaries means that more knowledge can flow into the Seoul cluster to boost innovation. Despite the presence of chaebols and larger corporations, local buzz is maintained through knowledge spillovers when smaller firms become a part of these larger corporations, and through the government's support of Hallyu. Even though strategic decisions are made beyond the cluster using global pipelines, knowledge flowing within the cluster still encourages lively local buzz, demonstrating that there is a synergy of local buzz and global pipelines in the Seoul K-pop cluster.

7 Conclusion

As argued by Bathelt et al. (2004), the combination of local buzz and global pipelines generates crucial knowledge flows within and between clusters that can impact the level of innovation within clusters by maintaining competition between firms. This is because gaining a competitive advantage through innovation and taking risks may lead to higher economic productivity. Through the perspective of local buzz and global pipelines in clusters, the J-pop and K-pop idol industries in Tokyo and Seoul respectively illustrate how striking a balance between the two can be critical to sustain knowledge flows and innovation. However, institutional structures and conditions illustrate how knowledge flows, and as a result innovative success, can become difficult to achieve if there is a lack of heterogeneity as that within the J-pop industry or if small firms are excluded from knowledge flows due to vertical integration in the K-pop industry.

This paper demonstrated that the clusters in Tokyo and Seoul are dependent on its participants. The actions and activities of industry players and governments are indicators of collaboration since strategies and campaigns, such as taking advantage of global advancements in technology and media, are used to promote the industry. Ultimately, various players in a cluster collaborate to assert pressure for innovation and economic growth within the industry. The two clusters investigated used different methods to create knowledge flows and maintain economic development. Firms within the idol industries have taken careful yet creative measures to generate innovation for

economic growth, especially when considering that both Japan and Korea are influences for other Asian idol industries.

While the J-pop industry has a larger domestic market, the keiretsu structures that formed networks and alliances within the industry were very rigid. Top entertainment agencies gained excessive control over the cluster, which hampered local buzz – leading the cluster towards a uniform approach in that firms take on similar strategies for innovation. The lack of global pipelines through minimal international partnerships made the industry more reliant on CDs, which was a successful method in the domestic market, in contrast to industries in other countries and clusters that were digitising music and setting new global trends. However, recent developments in the industry, like cross-border collaborations, have demonstrated how Tokyo has become better in utilising global pipelines.

On the contrary, the K-pop industry in Seoul recognised that expanding to global markets would significantly increase economic growth, which gave them an advantage in creating global pipelines since entertainment agencies needed to know what trends were popular beyond national borders. As a result, the K-pop industry unlike their Japanese counterparts transitioned into digital music. Moreover, while established entertainment agencies in Seoul pioneered certain innovative processes in the cluster, such as adapting the idol production process and creating international alliances, smaller entertainment agencies were also able to gain competitive advantage by presenting unique and unconventional ideas that gained popularity within the industry. Nonetheless, given the smaller domestic market and the heavy hands of larger firms, Seoul continues to place heavier emphasis on global pipelines than local buzz to generate knowledge.

This paper has also generated further questions and identified needs for future research, particularly about the idol industry. For one, there is currently little research in economic geography on the idol industry, making efforts to define it difficult, since it includes various aspects of the creative industries, including music, advertising, television and film, and more. While this paper attempts to identify the knowledge-creation structure behind the success of this industry, further empirical studies are needed to generate original empirical material to support the conclusions drawn in this paper about the role of local and global networking and related knowledge flows. A closer consideration of the idol industry through surveys or interviews would be beneficial to creating a more nuanced understanding of the factors underlying its growth dynamics.

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Appendix

Table A.1 – List of Japanese Idol Industry Firms in Tokyo

Firm	Ward	Number of employees	Link
KING RECORD	Bunkyo	308	https://cnt.kingrecords.co.jp/info/company/
AquaLuna Entertainment	Chiyoda	-	https://aqualuna.net/
Arc Jewel	Chiyoda	-	https://arcjewel.com/
Cover Corporation	Chiyoda	154	https://cover-corp.com/company/
SML Management	Chiyoda	-	https://sml-management.jp/s/sml/page/about?ima=5430
Sony Music Entertainment	Chiyoda	3700	https://www.sme.co.jp/company/overview/
Vernalossom	Chiyoda	-	https://vernalossom.jp/#about-sec
Origami Production	Chuo		https://www.origami-pro.co.jp/#company
LDH	Meguro	-	https://www.ldh.co.jp/company/profile/
ROOFTOP	Meguro	-	https://www.rooftop.tokyo/company
Amity Production	Minato		http://amity-pro.com/company/index.html
AVEX	Minato	1409	https://avex.com/jp/en/corp/outline/
C Major Works	Minato	-	http://cmajorworks.co.jp/company.html
Johnny's	Minato	170	https://www.johnny-associates.co.jp/company/
Leaders Entertainment	Minato	-	http://leaders-entertainment.official.jp/%e4%bc%9a%e7%a4%be%e6%a6%82%e8%a6%81/
MAGES	Minato	-	https://mages.co.jp/about/company/
NBCUniversal Entertainment Japan	Minato	-	https://nbcuni.co.jp/company/index.html
pony canyon	Minato	450	https://company.ponycanyon.co.jp/profile-en
Starbase	Minato	-	https://starbase.jp/company/
UNiCORN	Minato	23	https://unicorn-ent.jp/company/
Daredemo Dream	Ota	-	http://mmdd.jp/about.html
A-light	Shibuya	60	https://a-light.jp/company
A-Sketch	Shibuya		https://www.a-sketch.com/company/
Amuse	Shibuya	333	https://www.amuse.co.jp/corporate/outline/
AtoM Entertainment	Shibuya		http://atom-ent.com/company/
F.M.F Music	Shibuya		http://www.fmf-music.com/
FIFTY-FIFTY	Shibuya	-	https://fifty-fifty.co.jp/company/

FlyingDog, inc.	Shibuya		https://www.jvcmusic.co.jp/flyingdog/company.html
Imagine	Shibuya	31	https://www.imagine.jp/
Lapone	Shibuya	-	https://lapone.jp/company/
Lexington	Shibuya	16	http://lexington-management.jp/#company
Mark Production	Shibuya	-	https://mark-pro.tokyo/company/
sakebi	Shibuya	-	https://sakebi.net/about/
stardust productions	Shibuya	-	https://www.stardust.co.jp/company/
Toy's factory	Shibuya	-	https://www.toysfactory.co.jp/docs/company
Try Hope Production	Shibuya	5	https://tryhope.themedia.jp/pages/4688635/static
Tsubasa Group	Shibuya	-	https://tsubasa-ent.co.jp/company
Twin Planet	Shibuya	116	https://twinplanet.co.jp/company/
Union entertainment	Shibuya		http://www.union-et.jp/company.html
Union Music Japan	Shibuya	-	http://www.union-mj.jp/company.html
universal music	Shibuya	550	https://www.universal-music.co.jp/about-us/
Vancia entertainment	Shibuya		https://www.vancia-ent.com/company/
Victor entertainment	Shibuya	400	https://www.jvcmusic.co.jp/company/profile.html
WACK	Shibuya	-	https://www.wack.jp/pages/818125/page_201701261456
Zest	Shibuya	-	https://www.zest-corp.com/company/#company_overview
Up-Front Group	Shinagawa	-	http://www.ufg.co.jp/company/
Dear Stage Entertainment	Shinjuku	50	https://dearstage.co.jp/company/
FreeK-Laboratory	Shinjuku	50	https://www.freek-laboratory.com/
N production	Shinjuku	-	https://nproduction-japan.com/about
Oubu Production	Shinjuku	-	https://www.oubu-llc.com/company-s-profile/
RINDO Entertainment	Shinjuku	-	https://rindo-entertainment.co.jp/company/
Kabukimono'dogs	Toshima	-	https://www.kabukimonodogs.com/about

Table A.2 – List of Korean Idol Industry Firms in Seoul

Firms	District	Number of employees	Link
JYP	Gangdong	-	https://www.jype.com/ko/JYP/Contact
A team entertainment	Gangnam	-	http://ateament.co.kr/skin/page/company_info.html
Around Us Entertainment	Gangnam	-	http://www.aroundusent.com/about/contact
Beat Interactive	Gangnam	-	http://beatkor.com/company

Big Ocean ENM	Gangnam	-	http://www.bigoceanenm.com/theme/boe/page/contact.php
Brand New Music	Gangnam	-	http://www.brandnewmusic.co.kr/contact/
DSP Media	Gangnam	-	http://dspmedia.co.kr/company/introduction
Fantagio	Gangnam	-	http://www.fantagio.kr/about-fantagio/introduction/
FNC Entertainment	Gangnam	-	https://www.fncent.com/c/1/5/21
Genie Music	Gangnam	-	https://www.geniemusic.co.kr/company/overview.html
Jellyfish Entertainment	Gangnam	-	http://www.jelly-fish.co.kr/sub/company.html
Kakao M	Gangnam	-	https://kakaotent.com/introduce/company
Key East Entertainment	Gangnam	-	http://www.keyeast.co.kr/page/page.html?mcd=01/01&langs=en
Konnect Entertainment	Gangnam	-	https://www.konnectent.com/company.php
Kpop Live entertainment	Gangnam	-	https://www.kpoplive-ent.com/aboutus
MNH	Gangnam	-	http://mnhenter.com/page/company
P Nation	Gangnam	-	https://www.pnation.com/
Starship Entertainment	Gangnam	-	http://www.starship-ent.com/company/about.php
Top Media	Gangnam	-	http://www.itopgroup.com/bbs/page.php?hid=M01_02
Vine Entertainment	Gangnam	-	http://www.vine-ent.co.kr/subpage/contact.aspx
Yuehua Entertainment	Gangnam	-	http://www.yhfamily.co.kr/
Zanybros	Gangnam	-	http://www.zanybros.com/about
Rainbowbridge World	Gwangjin	-	http://www.rbbridge.com/?page_id=15896
131 (ONE THREE ONE)	Mapo	-	https://www.131online.net/about
CJ ENM	Mapo	-	https://www.cjenm.com/en/history/
KQ Entertainment	Mapo	-	https://kqent.com/about
Urban Works	Mapo	-	http://www.urbanworks.co.kr/home/sub01.php?mid=7#h31
WM entertainment	Mapo	-	http://www.wment.co.kr/?c=user&mcd=wma001
Woollim Entertainment	Mapo	-	http://woolliment.com/woollim_intro.php
YG	Mapo	-	
10x Entertainment	Seocho	-	https://10x.so/index#CONTACT
Brave Entertainment	Seocho	-	http://www.bravesound.com/bbs/content.php?co_id=company
FLO House	Seocho	-	https://www.dreamuscompany.com/company/aboutus

Sony Music Entertainment	Seocho	-	https://sonymusic.co.kr/
BlackBerry Creative	Seongbuk	-	http://blockberrycreative.com/Contact
Cube Entertainment	Seongdong	-	http://cubeent.co.kr/
SM	Seongdong	522	https://www.smentertainment.com/Overview/Introduction
YG Plus	Yeongdeungpo	-	http://www.ygplus.com/contact/contact_us
HYBE	Yongsan	-	
UPVOTE Entertainment	Yongsan	-	https://www.upvote-ent.com/contact-1