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**THE CHANGING ROLE OF THE
KOREAN FOOD STORE IN
NEW YORK CITY**

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Abstract

New York City boasts one of the world's largest urban areas and metropolitan populations. These conditions present enormous challenges to the distribution of food products for New York City residents. The distribution system that has emerged in response to these challenges is unique: specialty store food sales, in particular, are more important in New York than in any other state. Yet very few studies have attempted to examine or document the system's uniqueness. This paper reports on a study conducted of one especially distinctive aspect of New York's food distribution landscape, the Korean Grocery Store.

Ninety Korean food store owners were personally interviewed, by trained interviewers fluent in Korean, regarding their perceptions, standard retail operating practices and performance measures. The Korean store owners/operators reported a number of practices and performance indicators that are substantially different from the similar measures in other food retailing channels. They rely, for example, on "traditional," often Korean controlled, distribution networks to source their products from wholesale markets in lieu of the standardized transportation systems typical of most convenience stores and supermarkets. Further, the sales mix, business motivations, merchandising practices and labor cost structures of most Korean stores depart significantly from that of other grocery stores.

At the same time, one of the significant findings of this study is that Korean retail operations have evolved considerably since prior research was conducted nearly ten years ago. No longer simply "green grocers," they now can be more properly described as small, convenience-oriented grocery stores. Their stores have been adapted to more closely meet the needs of the lives of their urban customers: store hours have been increased, new grocery lines have been added and fresh food offerings have been expanded from simply fresh fruits and vegetables to a wide array of bakery items, meats and fully prepared foods.

Acknowledgments

The data reported in this study resulted from the energetic efforts of the 12 Cornell students who carefully interviewed nearly 100 Korean grocery store owners in Manhattan during the January break between their semesters. Without their important contribution, this study would not have been possible. Similarly, we are grateful to all the Korean store owner/operators and their staffs who willingly and patiently responded to our inquiries. Our hope is that information in this report may provide new information to assist them in their future business planning.

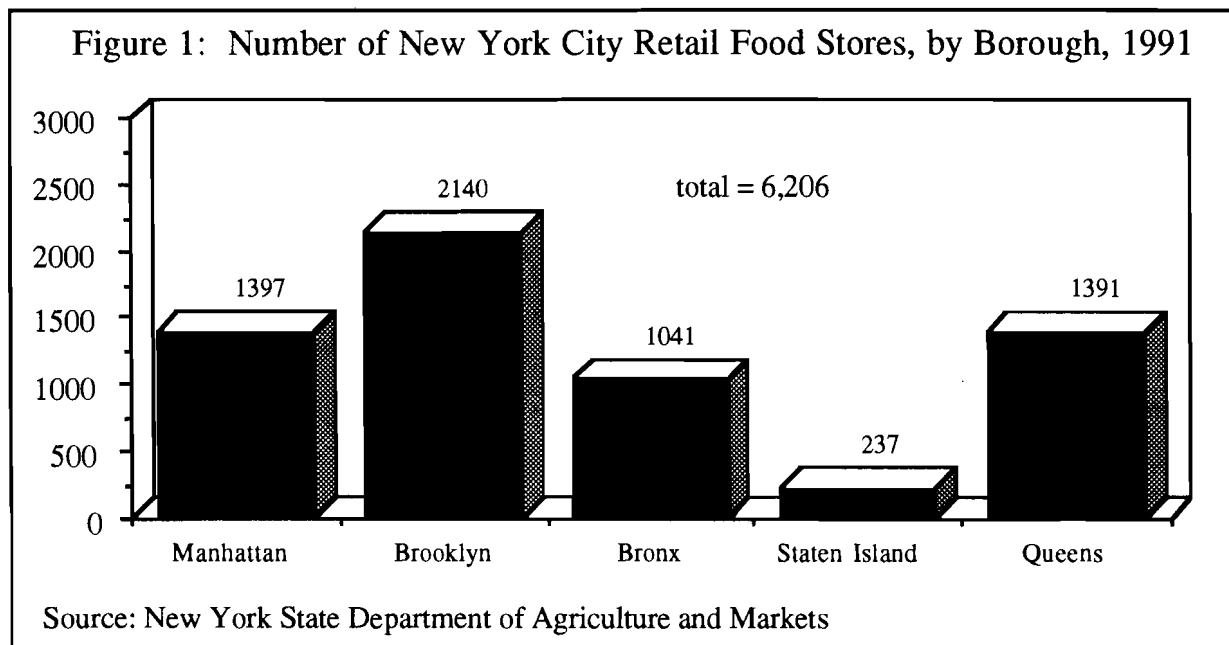
This report is one part of a much larger research project directed by Dr. Jeanne B. Mueller, Department of Human Services and Dr. David R. McCann, Department of Asian Studies, both at Cornell University. Their guidance of the project methodology and student interviewers as well as their comments on this report are gratefully acknowledged. The authors also thank Professor Enrique Figueroa for his comments and review of this report. Of course, any shortcomings in the report are the responsibility of the authors.

Introduction

Boasting one of the world's largest urban areas and one of its highest population densities, New York City presents an enormous number of challenges to the distribution of food products. The conventional means of transport, wholesale distribution facilities and retail outlets that are taken for granted in much of the food industry are often not feasible in New York City. High real estate costs preclude the spacious supermarkets that have become familiar landmarks in most of suburban America and the premium on space demands different kinds of distribution logistics and technology. Moreover, the diverse cultural backgrounds of New York City residents requires not only a different product assortment in food stores than one would find in a typical supermarket but adds to the complexity of otherwise standard supermarket industry labor practices as well.

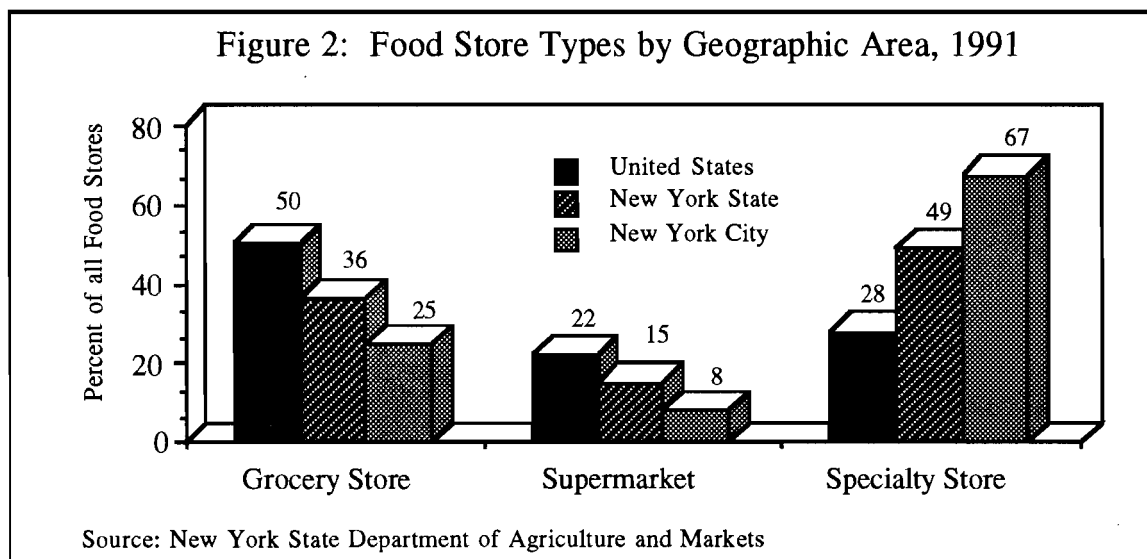
Food Retailing in New York City

The industry that has grown in response to these challenges is unique in the U.S. food distribution system. In 1991, there were 6,206 food stores in New York City, with two boroughs, Manhattan and Brooklyn, accounting for 57 percent of the total (Figure 1). A much greater diversity exists, however, in the format of New York City's food stores than in the rest of the United States.



Food stores can be categorized broadly into three principle groups: supermarkets, grocery stores and specialty stores. The distribution of these food

store types in New York City is vague. Whereas supermarkets¹ in the rest of the United States constitute about 22% of all food stores, they only constitute 8% of food stores in New York City (Figure 2).



The principal reason for this difference can be seen in the number of specialty food stores in New York City relative to the rest of the United States. Only about 28% of all the food stores in the United States are classified as "Specialty Food Stores,"² however, over two-thirds of all food stores in New York City are of this type. In fact, New York City alone contains approximately 3,440 specialty stores or approximately 56% of all specialty stores in the State. Moreover, New York City has a disproportionate share of U.S. specialty stores as well, particularly in produce, meat, fish and seafood stores (Table 1). Although space limitations and tradition are contributing factors, the significantly higher ratio of specialty food stores in New York City (and State) may be explained by the greater ethnic diversity that exists in New York relative to the demographic makeup of the rest of the U. S.

As a result of the large share of total food spending that takes place in New York City's specialty food stores—believed to be the highest in any major U.S. market—New York State is second only to California in total sales of the various types of specialty foods (Table 2). Specialty food sales per capita are nearly twice as high in New York state or the rest of the U.S. (Table 3). Furthermore, whereas New York City's population is only 3.5 percent of the U. S. total, over 6.5 percent of the nation's specialty food shops are found within the five boroughs of New York City.

¹"Supermarkets" are typically defined as a retail outlet selling at least \$2 million worth of a broad range of grocery products. Whereas, a "grocery store" is a retail outlet selling less than \$2 million a year of a broad assortment of grocery items.

²"Specialty Stores" tend to specialize in a narrow range of products that include meat, fish and seafood stores, bakeries and produce markets.

Table 1: Specialty Stores in New York City, 1987

	NY City	Percent of New York State
Meat, Fish, Seafood	1,127	64%
Bakery	1,193	54
Produce	367	69
Candy, Nut, Confection	257	44
Dairy	135	37
Miscellaneous	<u>361</u>	<u>55</u>
	<u>3,440</u>	<u>56%</u>

Source: Census of Retail Trade

Table 2: Specialty Food Store Sales, leading five states

State	Sales (bil.)
California	\$2.52
New York	2.19
Massachusetts	1.60
Florida	1.02
Pennsylvania	1.00

Source: Census of Retail Trade

Table 3: Specialty Store Numbers and Per Capita Spending by Store Type, New York State and United States, 1987

	Per Capita Spending			Number of Stores		
	US	NY	NY % of US	US	NY	NY % of US
Meat, Fish, Seafood	\$23	\$52	230%	11,364	1,722	15.6%
Bakery	20	32	160	21,790	2,203	10.1
Produce	7	15	210	3,271	536	16.4
Candy, Nut, Confection	5	6	120	6,124	580	9.5
Dairy	4	9	230	3,302	368	11.1
Miscellaneous	<u>8</u>	<u>12</u>	<u>150</u>	<u>7,271</u>	<u>655</u>	<u>9.0</u>
	<u>\$67</u>	<u>\$126</u>	<u>190%</u>	<u>53,122</u>	<u>6,064</u>	<u>11.4%</u>

Source: Census of Retail Trade

The special challenges associated with distributing food in New York City, coupled with the unique nature of its ethnic and specialty food stores, suggests the need for a closer examination of this under-researched segment of the U.S. food

distribution system. This study sheds light on an especially distinctive and growing part of the food retailing landscape in New York City for the last twenty years, the "Korean Grocery Store."

Methodology

In January 1992, 12 Cornell University seniors conducted a field survey of 90 Korean-owned food stores in the borough of Manhattan. The Korean stores were chosen from a New York State Department of Agriculture and Markets listing of all food stores in Manhattan. A random sample of the store owners with Korean surnames was chosen. The store owners were subsequently notified by mail, in Korean, that a survey team would be visiting them shortly. An extensive personal interview was held with each Korean shop owner and, generally, several of the store personnel as well. The interviews were conducted by Cornell students, in teams of two, at least one of whom was a Korean-American fluent in Korean.

The primary survey instrument had been translated into Korean since it was known from previous research (Young 1983) that many of the store owners were not completely comfortable speaking English and, moreover, were unlikely to share potentially confidential information with unknown academic researchers. The survey instrument was first developed in English and translated into Korean. Subsequently, the Korean was proofread and "back-translated" to English to verify correct interpretation. The questionnaires were pre-tested to identify any potential problems with interpretation or wording. The final questionnaires were printed in both English and Korean. In this way, it was hoped that Korean-American researchers conducting the survey in Korean, would be able to gather information on operating practices of this food retailing segment otherwise inaccessible to researchers. A similar technique has been used by Young (1983) in a Korean neighborhood of Los Angeles and by Kaufman and Hernandez (1991) in a Hispanic neighborhood in Philadelphia.

Empirical Results

Korean Grocery Store Owners: A Profile

Although once associated principally with the hawking of fresh fruits and vegetables from sidewalk markets and thus known by the name of Korean "green grocers," the information gathered in this survey reveals that the once "green grocers" and their stores have evolved and become considerably more complex since the last research study of their businesses and cultural practices conducted by Young (1983.)

In nearly all cases, the Korean store owner today—like in the 1983 study—is a still recent immigrant to the United States, generally within the last 20 years. The data in this study indicate that the average time operating his current store is 7.3 years. In the past, Korean store owners were shown to be unusually well-educated relative to the average education levels of other grocery store and supermarket owner/managers. In fact, Young (1983) found that 73% of Korean store owners had

college degrees (generally from Korean universities) in 1983, a figure nearly double that of the average educational levels of traditional retail grocery store owners.

However, the current study finds a significant reduction in the education levels of Korean store owners: only 53% of the owners in 1992 had even some college education. This level of education is now very close to the average educational attainment of most grocery store and convenience store owners in the rest of the U.S. A national survey of convenience store managers, for example, indicated that 56% of managers had had some college (*Convenience Store News*, 1991). This result suggests that the educational profile of the Korean store manager is no longer much different from that of the general population of small grocery store managers nationwide. Trying to explain this current reduction in education, one might speculate that the longer the Korean immigrants remain in the U.S., the more likely it is that their previous high educational levels permit them to move to other positions, often perceived by them to be more desirable or prestigious than operating a food store. Those that remain are more similar in educational attainment to the norm of U.S. food store owners.

Korean immigrants report becoming involved in the retail grocery trade for a wide variety of reasons. Young (1983) points out that, at that time, a principal reason Koreans gave for running a food store is that it required a minimum of English language skills. However, by 1992, this too appears no longer to be the major driving force behind the Korean involvement in the grocery business. Among the reasons for beginning a grocery store in the 1992 study, "entrepreneurial spirit" was cited most often by survey respondents (Table 4).

Table 4: Korean Store Owners' Reasons for Starting Food Store Businesses, 1992

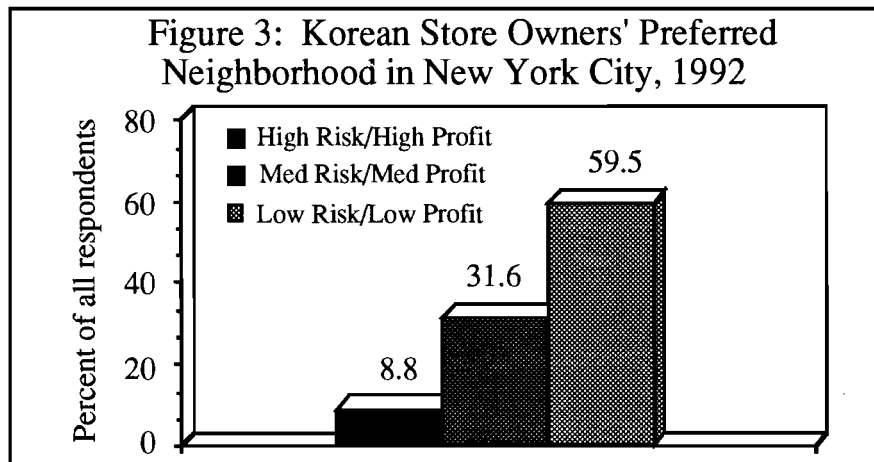
Reason	Percent Saying
Entrepreneurial Spirit	25%
Support Family	24
Better Life	19
Easy Entry	8
All other	<u>24</u>
	100%

Many of the participants in our study reported that the drive to succeed as an independent businessman was a significant factor explaining their perseverance in the retail grocery business. Indeed, the "lack of language skills" did not even appear among the major reasons for becoming involved in the food business in the more recent survey.

Store Location

Virtually all research on retailing performance identifies "location" as a critical success factor. Indeed, some have suggested that the reason for the success of the Korean grocers in New York City is that they are willing to tolerate relatively

high risk/high crime neighborhoods in exchange for the high profits that such neighborhoods tend to bring. Most conventional publicly-held supermarket companies, responsible to shareholders for earnings stability and consistent growth, are not able or willing to make this type of risky tradeoff. In this survey, Korean retailers were asked to assess their tradeoff between "high risk-high profit" locations with "low risk/low profit" locations. Their responses are summarized in Figure 3. Contrary to much popular wisdom, nearly two-thirds of Korean store owners in the 1992 survey report that, in fact, they prefer low risk/low profit locations and that they avoid high risk situations. This conservative store location strategy appears to be another indication that Korean store owners are no longer following approaches as radically different from conventional grocery owners as those of earlier eras appeared to be.



In fact, Korean store owners play an important role in the communities they serve. Only one-third of owner/operators reported that their neighborhoods were dangerous, and 73 percent say that conflicts with customers pose no problem. Over 70 percent of the owners said that they know from 10-20 percent of their customers by name. Over half of the stores offer some of their customers credit and, of those offering credit, 67 percent do so with no stated repayment terms. Nevertheless, fully 30% of respondents still indicated at least a medium degree of risk preference. It is unlikely that any supermarket company would be willing to tolerate even this level of risk.

However, while it appears that Korean grocers are not often forced into commercial markets to raise necessary capital, it is perhaps axiomatic that the relatively meager capital availability through the traditional savings and family sources certainly limits expansion possibilities of many Korean businesses. Indeed, only 12 percent of Korean store owners reported operating more than one store.

Koreans, like good businessmen everywhere, attempt to locate their stores to minimize competition. When asked about their perceptions of competition, the most frequently named source (by 29% of respondents) was "other Korean stores" (Table 5). This was also the most frequently perceived source of competition in Young's 1983 study. However, in Young's earlier study, a somewhat larger

proportion of respondents, 38%, believed that other Korean stores were “very competitive” with their businesses, with the remaining responses failing to identify any other major perceived threat of competition.

Table 5: Perceived Competition from Other Stores, 1992

<u>Store Type</u>	<u>Percent Saying</u>
Other Korean Store Owner	28.9%
No Other Competition	23.3
Other Grocery Store	15.6
Supermarket	4.4
Other	27.8
	100%

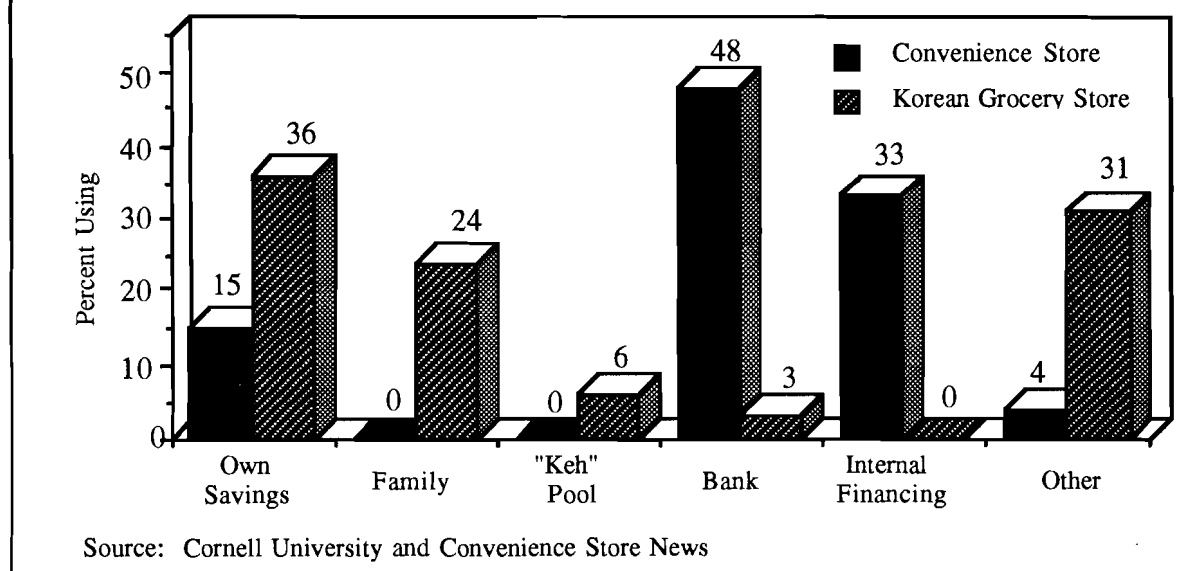
Source: Cornell University

It again appears that the definition of the “appropriate competition” today is broadening to include other forms of retailing as the Koreans approach more of a mainstream grocery marketing strategy.

Capital Sources

Raising adequate capital to cover the many business start-up costs is a serious constraint for most small businesses. Securing loans from various financial institutions is the means by which the great majority of small businesses address this dilemma. However, Korean grocery store owners differ significantly from other conventional small retailers in this respect. The single largest source of capital to finance Korean grocery stores comes from owner savings (36%), while another 50% comes from a variety of family and other “non-traditional” sources (Figure 4). Banks are rarely ever used by Korean grocers. Such borrowing practices are in stark contrast with the financing behavior of other food retailers, even quite small ones. Convenience food stores owners, for example, secure nearly one-half of all their capital from banks--the most common source for small businesses--whereas Korean store owners only rely on this conventional financial institution for 3 percent of their capital needs (Figure 4).

Figure 4: Primary Source of Capital, New York City Korean Grocery Stores and U.S. Convenience Stores, 1992



However, while it appears that Korean grocers are not often forced into commercial markets to raise necessary capital, it is perhaps axiomatic that the relatively meager capital availability through the traditional savings and family sources certainly limits expansion possibilities of many Korean businesses. Indeed, only 12 percent of Korean store owners reported operating more than one store.

Store Operations

As Korean stores have been gradually repositioned away from their nearly exclusive focus in the past on fresh produce toward more of a full-line small grocery/convenience store, many of their operational characteristics have also changed to reflect this shift in orientation.

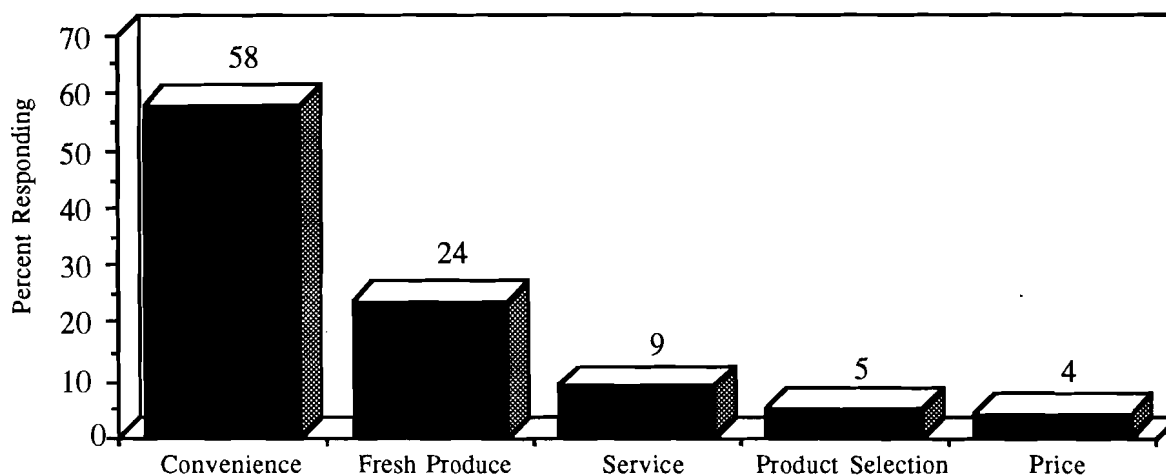
In 1983, Young noted that the average hours of operation for the "green grocer" markets were only 12.5 hours per day, generally Monday through Saturday. In the current survey, it was found that 82% of all Korean stores were open seven days a week. Further, fully one-half of the remaining group in 1992, those open only Monday through Saturday, were open 24 hours per day on these six days. These considerably longer store hours are indicative of a new "convenience-oriented" strategy whereby the Korean owners are attempting not only to offer a more complete line of goods but also to offer them at longer and more convenient times for busy urban shoppers. Once again, these new hours compare closely to the current standard in the convenience store industry where 56% of all stores are open 24 hours a day (*Convenience Store News*, Aug. 31, 1992).

The more convenience-oriented strategy is also illustrated in Korean store owners' attempts to be responsive to the ever more hectic lifestyles of their urban

consumers. When asked, for instance, why customers were likely to shop in their stores versus other food stores, the single most frequent response given by the store owners was "convenience" (Figure 5). "Quality of produce" remained the second most frequent response. This contrasts slightly with research conducted by Kaufman and Hernandez (1991) who asked a similar question of Hispanic grocery store owners in Philadelphia. Hispanic grocery store owners gave "closeness to peoples homes" and "emergency shopping" as the two leading reasons that customers shop in their "bodegas." Both of these respondents could fairly be interpreted, as with the Korean case, as forms of convenience.

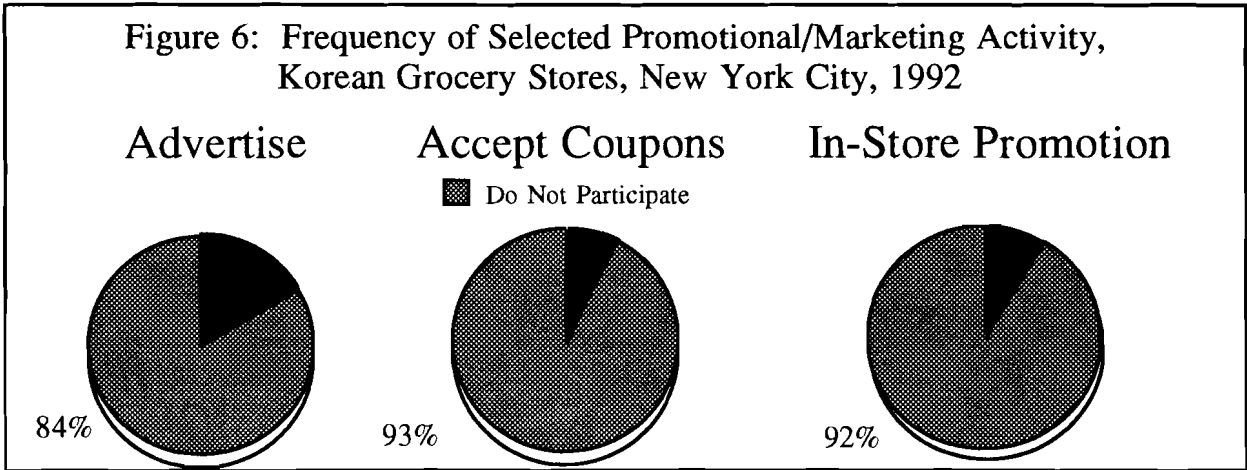
This focus on convenient hours and location is also reflected in the relative lack of merchandising activities in the Korean stores. Ninety percent of respondents do not accept manufacturer's coupons, and 92 percent do not engage in-store sampling or promotion (see Figure 6). Further, only 16 percent advertise. Such nonchalant attitudes toward promotion and merchandising is practically unheard of in the grocery store industry. Virtually all supermarkets accept coupons and engage in at least some in-store promotion and activity (German, 1991). The same is also true for convenience stores. This lack of promotional marketing further reinforces the notion that customers are drawn to the Korean shops because of the stores' convenient locations and extended hours of operation, not by merchandising activity.

Figure 5: Reasons Korean Store Owners Say Customers Shop Their Store
New York City, 1992



Source: Cornell University

Figure 6: Frequency of Selected Promotional/Marketing Activity, Korean Grocery Stores, New York City, 1992



Performance Measures

The Korean store owners were asked to estimate their weekly customer count. The results are shown in Figure 7. The mean customer count fell in the range between 2,000 and 4,000 customers per week. For a store open 7 days per week, this converts to about 428 customers per day. The daily customer count for a New York State independent supermarket is approximately 1,428 per day, more than three times the Korean Grocery. However, the average New York State independent supermarket measures about 15,400 square feet of selling space (Manhattan supermarkets are considerably smaller) whereas, the average Korean grocery store is about 2,000 square feet (Table 6).

Figure 7: Customer Count per Week in Korean Grocery Stores

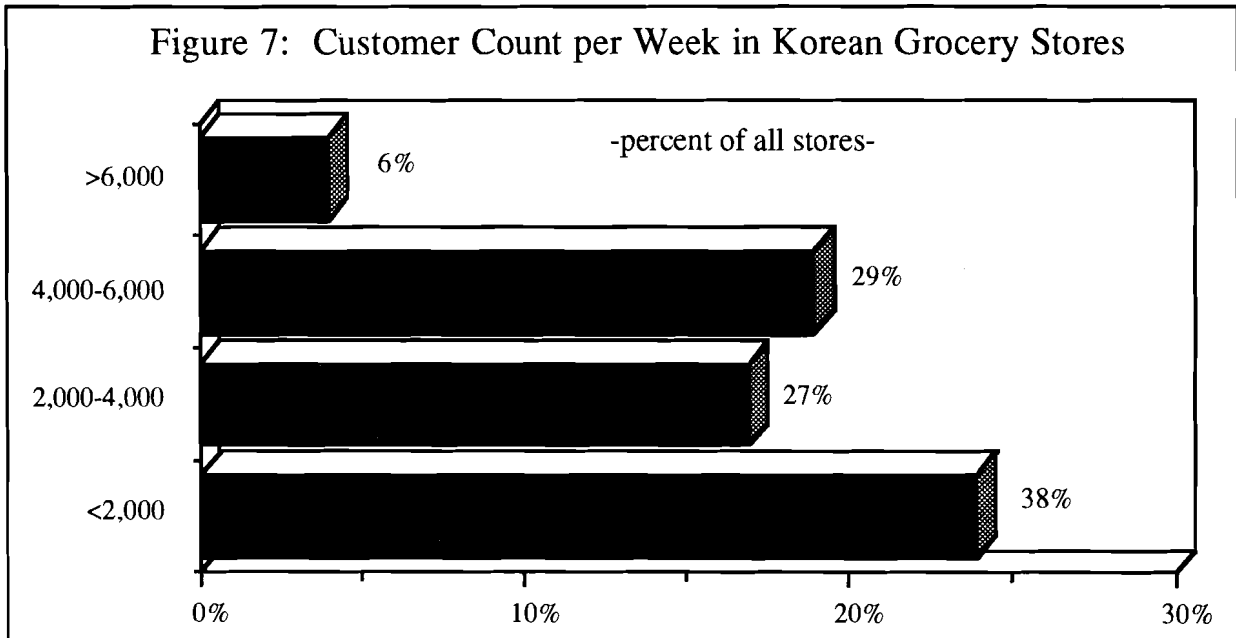


Table 6: Operating Statistics, by Format

	New York State			New York Specialty Stores
	Independent Supermarket	Convenience Stores ¹	Korean Grocery Stores	
•Average Size (square feet)	15,403	2,500	2,000	na
•Customer Count per Week	9,996	3,213	3,000	na
•Average Weekly Sales per Unit	\$123,481	\$11,903	\$4,807	\$6,807
•Average Transaction Size	\$14.53	\$3.15	\$2.24	na
•Percent Open 24 hours seven days a week	11%	63%	45%	na
•Weekly Sales per Square Foot	\$8.02	\$4.76	\$2.40	na

¹Northeast

Sources: Cornell University, Convenience Store News

Sales and Productivity

Korean grocery stores have a much smaller average transaction size than do their larger supermarket counterparts. The average customer transaction in a U.S. supermarket is approximately \$12 per shopping trip, and it is about \$14.50 in a independent supermarket in New York State; while for a Korean grocery shop the transaction size is closer to \$3 (Table 6). However, more surprising, Korean grocery stores do not compare favorably with supermarkets on a sales per square foot basis. On the basis of average annual sales for the typical Korean grocery store of approximately \$250,000, a weekly sales per square foot of about \$3 can be calculated, compared to over \$8 for the average New York State independent supermarket and nearly \$5 for the average convenience store (Table 6).

Gross Profit

Various format food stores carry different assortments of foods with different service levels. The profit levels of the departments within the store are varied strategically to produce the desired store-wide profit margin. A comparison of sales mix and gross margin for three major food categories carried in supermarkets, Korean grocery stores and traditional convenience stores is shown in Table 7. We see that Korean store owners have a much higher percentage of sales in the fresh produce department than do supermarkets or traditional convenience stores. This is especially significant when noting that all store types, but Korean grocers in particular, enjoy the highest gross profit margin of all major departments in the store in fresh produce. Korean store owners also show higher margins in other product lines.

It is important to note that these higher margins do not necessarily reflect higher prices to consumers, however; in fact, it is more likely that they are indicative of different operational practices, including, for example, a less complex distribution system and lower labor costs. This latter factor, in particular, may be

significant since labor costs typically constitute over two-thirds of all retailer costs. The average Korean store employs 4.0 individuals, 2.1 family members and 1.9 non-family members. Sixty-four percent of the time the working family members were the owner and spouse. More significant, 51.4 percent of the time family members were not paid wages for their labor. The total store labor hours for all workers in Korean stores were reported to be 468 hours per week or 16.5 hours per worker. This is about twice the standard of the grocery industry. Subsidization of certain costs, such as with the use of family labor, would appear to lend significant advantage to Korean stores over their supermarket competitors.

Table 7: Gross Margin and Sales, Percentage Korean Grocery Stores, Supermarkets

	Gross Margin			Percent of Sales		
	Korean Grocery (%)	Supermarket (%)	Convenience Store (%)	Korean Grocery (%)	Supermarket (%)	Convenience ¹ Store (%)
Dry Grocery	35.4	20.0	na	30.8	27.0	53.1
Meats	33.5	22.9	na	17.5	16.5	4.1
Fresh Produce	45.8	36.1	na	36.0	9.8	3.4
Average	38.2%	26.3%	na	Total 84.3%	53.3%	60.6%

¹Excluding gasoline sales

Sources: Cornell University, Convenience Store News

The conventional supermarket and convenience store distribution systems are not in wide use by Korean store owners. In fact, thirty percent of the Korean store owners pick up their own produce at a terminal wholesale market (often, Hunt's Point in the Bronx). Twenty-nine percent say they pick up their own dry grocery supplies and 46 percent pick up their own meats. This may account for a significant amount of the savings that allow store owners to realize higher margins than supermarkets which maintain wholesale distribution centers and costly transportation fleets. The store owners' payment practices could be another factor, since a staggering 89 percent say that they routinely pay cash for supplies. Korean store owners undoubtedly receive discounts for such cash payments and translate these savings into higher gross margins than supermarkets or traditional convenience stores are able to achieve.

Conclusion

Korean grocery stores provide a dynamic illustration of how retail industries must be customer driven in order to survive and prosper. The evolution of the Korean grocery store in New York City is a story of cultural adaptation. Koreans have shaped their businesses to fit the changing lifestyles of city dwellers. The stores are now open longer and carry a much more complete line of merchandise

than the limited “green grocer” market of the past. Fresh produce has become less important in the sales mix as the stores have diversified into dry groceries, meats, bakery and prepared foods.

The Korean owned grocery stores are not supermarkets or convenience stores, however, this study has shown that to an increasing extent, Korean stores compete with both of these formats. The Korean grocery stores have evolved into a hybrid, a unique store type borne of the hectic lifestyles of Manhattanites and tempered by the challenges of succeeding in New York City. As much as the Korean stores are like traditional convenience stores in size, customer count and sales dollars, they are unlike them in sales mix, business motivation, labor costs and distribution systems. These Korean stores remain a unique part of the New York City food system.

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