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**THE NATURE OF**  
**NON-FOOD NON-PRICE COMPETITION**  
**IN FOOD STORE ADVERTISING**

*By John H. Weber and William E. Folz*

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## CONCLUSIONS

- 1) Promotions by food retailers not related to food, such as stamps and money games, are of considerable importance in food store advertising both from the standpoint of percentage of advertising devoted to them and from the standpoint of the number of ads in which they are included. More space is devoted to this type of advertising in the newspaper ads of supermarkets than in any of the food departments with exception of dry groceries and meats. About 51 percent of all ads carry promotional gimmicks.
- 2) The very large supermarket chains tend to have the greatest number of ads with special non-food, non-price promotions in them. These organizations are followed in order by the smaller ones; each classification in descending order of size has significantly fewer occurrences of such promotions in their newspaper ads. The smallest firms have, on the average, only 1/3 as many such promotions as the largest stores.
- 3) There are also significant variations by areas in the use of non-food promotions by supermarkets. Dallas and Chicago tend to emphasize this type of promotion. Both of these cities have shown a tendency to advertise more than one such gimmick in each ad. Salt Lake City, San Francisco and Los Angeles have a fewer number of ads with such promotions. These cities on the average have less than 1/7 as many such ads as do Chicago and Dallas.
- 4) The most frequent type of non-food promotion is extra stamps. Again the evidence indicates that larger firms tend to advertise extra stamps more frequently than do the smaller firms. Stamps require a more elaborate form of administrative organization and they are a very expensive type of promotion. These factors tend to exclude the smaller firm from this type of promotion. The smaller stores restrict their promotions for the most part to less expensive types of activity, such as coupons, which are neither as expensive nor do they require as elaborate administration to operate.
- 5) The significance of non-food, non-price advertising in retail food stores is that these firms are either tending to avoid the more conventional types of price advertising or they find that price does not have the appeal to consumers that it formerly did, at least not as much appeal as stamps or other similar promotions.
- 6) Unless it can be demonstrated that the leaders in non-food, non-price promotional competition are also the leaders in price and quality competition, the conclusion must be drawn that non-food, non-price competition is becoming a substitute for more conventional concepts in competition. This question will be analyzed in a future bulletin on price competition in specific commodities.

# **THE NATURE OF NON-FOOD NON-PRICE COMPETITION IN FOOD STORE ADVERTISING**

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**F**OOD store advertising is used to engage in a considerable number of competitive practices other than the advertising of foods at a published price. A great deal of the competition that is evident in the ads is not related to food, to any other kind of merchandise, nor is it related to price, but may be described as non-merchandise, non-price promotional competition. A high percentage of the promotions used by food stores are giveaways, particularly gambling-type giveaways. The magnitude of use of such promotional practices indicates that they are an exceedingly important competitive weapon. If they are not, the food store advertising managers, merchandisers and managements would not place as much emphasis on them as they do.

## **18,000 ADS STUDIED**

Objective data on the types of promotional practices were obtained from reading 18,497 food store ads which appeared in 10 major metropolitan centers in the calendar years 1963 and 1964. A representative newspaper, and in some cases two newspapers, was read in each market each day. The data were recorded for coding on IBM cards for machine analysis and some of it for hand tabulation.

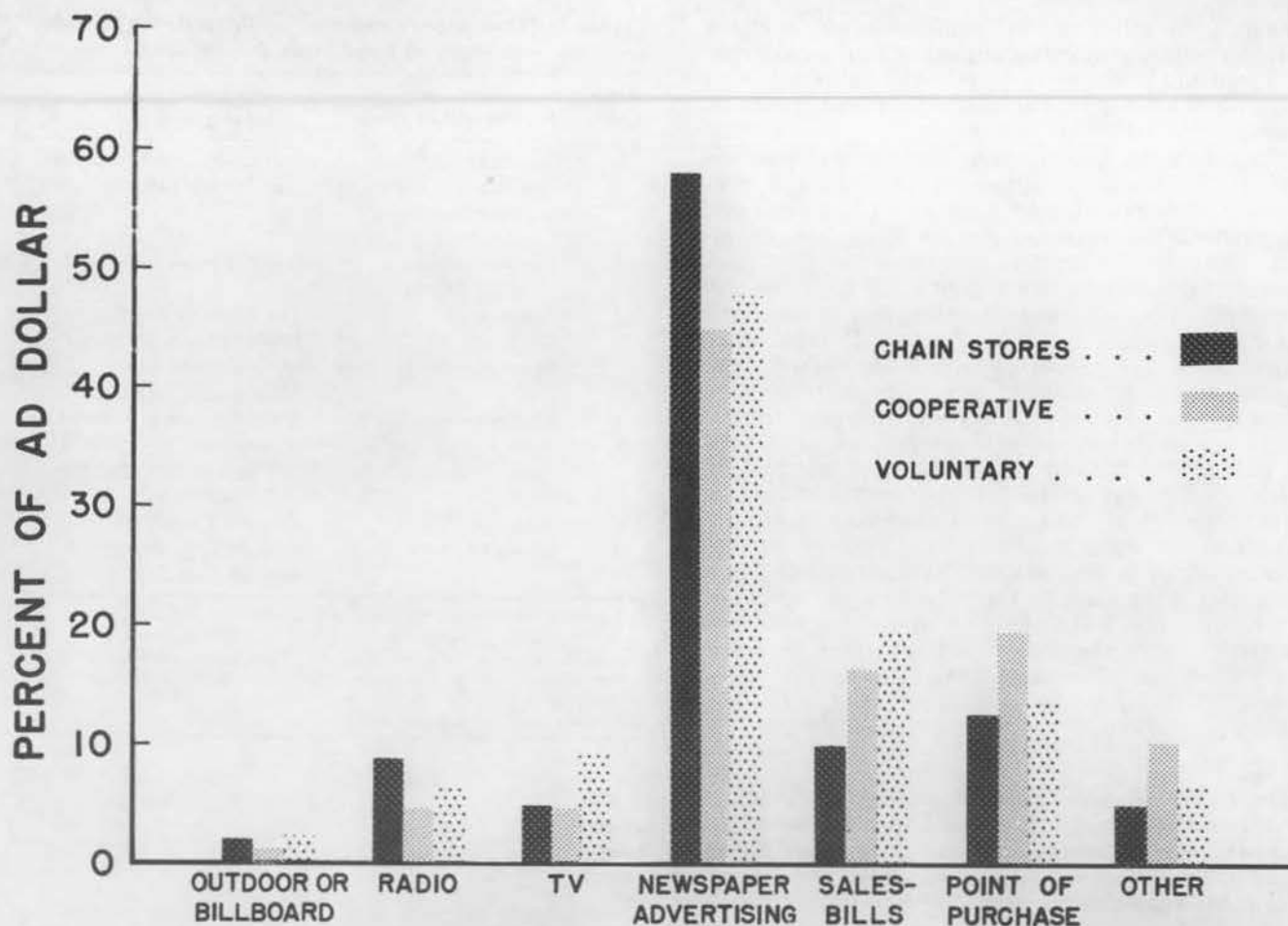


Figure 1. Where the retailer spends his ad dollar.

## NEWSPAPER ADS AUDITED

Newspaper advertising was the basic medium for food store advertising. On the average, 52% of the food store advertising budget was invested in newspaper space. See Figure 1. Only 6% went to TV and 6% to radio. Handbills, point-of-purchase displays and signs, billboards and other types of advertising accounted for the remainder. Of the mass media—newspaper, radio, TV, billboards and handbills—newspapers received nearly 70%. Newspapers received 80% of the newspaper-radio-television budget. Corporate chain stores invested a significantly higher percentage of their budgets in newspaper advertising than either cooperative or voluntary groups.

The newspaper is considered by both retailers and consumers as the basic medium for food advertising. It is highly unlikely that any major food retailing organization would put on a major promotion that would not appear in its newspaper ads. This is why they were chosen as the medium in which to study competitive practices.

<sup>1</sup>A "Shopper" is a newspaper covering a small local area that is mainly devoted to carrying advertising, with a little local news to attract readers. It is usually distributed free once or twice a week to every living unit within the area it covers.

Each chain store headquarters (or division headquarters if there is more than one division), while it may advertise in many newspapers and shoppers<sup>1</sup> in its area each week, usually has only one basic ad. In the San Francisco Bay area, for example, one chain store reported advertising each week in 47 newspapers, another in 27, while a third advertised in 112. The size of the basic ad may vary depending on the paper or shopper in which it is to appear. In one paper it may be two pages, in another, the same week, it may be one page, while in a third publication it may be only five columns wide by fifteen inches deep.

When the size of an ad is changed it can be changed photographically or by making an entirely new layout. When changed photographically a reduction is made of the original ad and then printed. In this case the ad is exactly the same, but reduced in size. When a new layout is made the smaller ad will have the same featured items and the same theme as the larger one, as in Figure 2. All items in the larger ad may be put in the smaller one, but printed in smaller type, or some of the listings of items may be omitted. Items left out would be minor shopping suggestions rather than a major feature item. Occasionally, for a grand opening of a new



Therefore, by auditing one newspaper in which most of the major retailers in an area are represented, it is possible to observe in the food ads the patterns of competition as they are developed. The advertising managers of major food retailers in each area were contacted to name the newspaper that carried the largest number of major food retailers in the area. Sample subscriptions to suggested papers were read to determine the percentage of coverage of major retailers in each paper. This sampling of newspapers showed that some metropolitan areas are too widespread for one paper to cover adequately major food distributors. In a far flung metropolitan complex, sizeable individual retailing organizations can locate within the complex. Such an organization, rather than advertising in a newspaper that covers the whole area, will advertise in a less expensive or more concentrated one that covers the local area in which it operates. In these situations two newspapers were chosen with duplicate ads eliminated. In Los Angeles, not even two newspapers would give an

Area Code	Metropolitan Area	Newspaper (s)
0	Salt Lake City	Salt Lake City Tribune
1	San Francisco Bay Area (includes San Jose)	San Jose Mercury-News
2	Los Angeles—Long Beach	Los Angeles Times
3	Denver	The Denver Post
4	Dallas	Dallas Morning News
5	Minneapolis-St. Paul	Minneapolis Star Minneapolis Tribune <sup>1</sup>
6	Chicago	Chicago Daily Tribune <sup>2</sup>
7	New York	Newsday White Plains Reporter-Dispatch
8	Atlanta	Atlanta Constitution
9	Kansas City	Kansas City Times Kansas City Star <sup>3</sup>

<sup>a</sup>Sunday food ads only.

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# you get at SAFEWAY !



**New York Cut STEAKS** \$1.89  
**Boneless Crossrib ROASTS** 93¢  
**Sirloin Tip ROASTS** 93¢  
**Boneless Chuck ROASTS** 77¢

**Swiss Steaks** 89¢  
**Crossrib Steaks** 93¢  
**Beef Stew** 89¢  
**Ground Chuck** 69¢

## More Wonderful Beef Buys

**Beef Brisket** 98¢  
**Beef Roasts** 93¢  
**Lean Ground Beef** 49¢  
**Beef Liver** 59¢  
**Beef Shortribs** 49¢

## Safeway Gourmet Beef Roasts

**New York Roasts** 1.89  
**Top Sirloin Roasts** 1.59  
**Tenderloin Roasts** 2.29  
**Rib Roasts** 1.79

## Miscellaneous Meat Values

**Large Bologna** 3-1  
**Sliced Bologna** 3-1  
**Pure Pork Sausage** 59¢  
**Pre-Cooked Scallops** 53¢  
**Breaded Fish Steaks** 99¢

**Pillsbury Flour** All-Purpose 5 Lb. Bag 39¢  
**Campbell's Soups** Most Varieties 6 for \$1  
**Del Monte Peaches** 24-oz. Can 4 for 89¢  
**Tomato Sauce** Town House 2 for 15¢  
**Angel Cake Mix** Pillsbury 15-oz. Pkg. 39¢  
**Gelatins** Jell-O, Assorted Flavors 10 for 59¢  
**Canned Milk** Imported From Denmark 14-oz. Can 2 for 25¢  
**Lunch Meat** Celebrity 12-oz. Can 3 for \$1

## Value Favorites From Pillsbury...

**Cake Mix** 29¢  
**Flouring Mix** 29¢  
**Flouring** 29¢  
**Cake Supreme** 29¢  
**Coffee Cake** 29¢  
**Cinnamon Swirl** 29¢

## Hungry Jack Pancake Mix

3 Lb. Package 59¢

## \*From The Bottle Shop

**Strawberry Whiskey** 1.79  
**50 Proof Gin** 1.29  
**50 Proof Vodka** 1.29  
**50 Proof Tequila** 1.29  
**50 Proof Rum** 1.29  
**50 Proof Brandy** 1.29

## Cream O' The Crop Grade AA Eggs

**Large Size** 41¢  
**Small Size** 39¢

## Wells Dog Food

12-1 Pouch Dog Food 65¢ Cat Food 6-79¢

## From The Dairy Dept.

**Cottage Cheese** 29¢  
**Lucerne Butter** 49¢  
**Mild Cheese** 69¢  
**Swiss Cheese** 69¢  
**Whipping Cream** 69¢  
**Half and Half** 29¢  
**Cream Topping** 49¢  
**Dutch Milk** 39¢

## Lucerne "CROC" Chocolate Milk

Half Gallon Carton 49¢

## Real Orange Juice

**Lucerne Brand** 69¢  
**Orange Juice** 69¢

## For Barbecue Time...

**Steak Sauce** 2-104  
**Hot Sauce** 2-104  
**Del Monte Ketchup** 2-104  
**Del Monte Dill Pickles** 2-104  
**Whole Sweet Pickles** 2-104  
**Fresh Whole Dill Pickles** 2-104  
**Kosher Dill Pickles** 2-104  
**Ripe Olives** 2-104  
**Reynolds Aluminum Foil** 2-104

## HI COUNTRY BRIQUETS

10 Lb. Bag 49¢

## 50% Over-Raked BEANS

5 for \$1 6 for \$1

## 50% Red Kidney BEANS

5 for \$1 6 for \$1

## 50% Brown Baked Beans

5 for \$1 6 for \$1

## 50% Corned Beef

5 for \$1 6 for \$1

## 50% Corned Ham

5 for \$1 6 for \$1

## 50% Corned Pork

5 for \$1 6 for \$1

## 50% Corned Sausage

5 for \$1 6 for \$1

## 50% Corned Turkey

5 for \$1 6 for \$1

## 50% Corned Veal

5 for \$1 6 for \$1

## 50% Corned Chicken

5 for \$1 6 for \$1

## 50% Corned Lamb

5 for \$1 6 for \$1

## 50% Corned Beef & Chutney

5 for \$1 6 for \$1

## 50% Corned Beef & Mustard

5 for \$1 6 for \$1

## 50% Corned Beef & Relish

5 for \$1 6 for \$1

## 50% Corned Beef & Sauce

5 for \$1 6 for \$1

## 50% Corned Beef & Gravy

5 for \$1 6 for \$1

## 50% Corned Beef & Hash

5 for \$1 6 for \$1

## 50% Corned Beef & Potatoes

5 for \$1 6 for \$1

## 50% Corned Beef & Peas

5 for \$1 6 for \$1

## 50% Corned Beef & Carrots

5 for \$1 6 for \$1

## 50% Corned Beef & Turnips

5 for \$1 6 for \$1

## 50% Corned Beef & Onions

5 for \$1 6 for \$1

## 50% Corned Beef & Mushrooms

5 for \$1 6 for \$1

## 50% Corned Beef & Celery

5 for \$1 6 for \$1

## 50% Corned Beef & Parsnips

5 for \$1 6 for \$1

## 50% Corned Beef & Rutabagas

5 for \$1 6 for \$1

## 50% Corned Beef & Cabbage

5 for \$1 6 for \$1

## 50% Corned Beef & Sauerkraut

5 for \$1 6 for \$1

## 50% Corned Beef & Applesauce

5 for \$1 6 for \$1

# ...the Wonderful Beef



**Standing Rib ROASTS** 98¢  
**Top Sirloin STEAKS** 1.59  
**Top Round STEAKS** 98¢  
**Market Steaks** 1.79

**Chuck Steaks** 69¢  
**Ground Round** 79¢

## Sliced Bacon

**Swift's Premium** 79¢  
**Dubuque** 79¢  
**Thick Sliced** 1.14

## Skinless Franks

**Safeway** 59¢  
**Dubuque** 69¢  
**Swift's** 69¢  
**Oscar Mayer** 69¢

## Poultry Values!

**SAFEWAY** 59¢  
**SAFEWAY** 59¢  
**SAFEWAY** 59¢  
**SAFEWAY** 59¢

## WATERMELONS

Choice, Red-Ripe Melons

Extra Special 49¢

Each 49¢

Bartlett Pears 4 Lb. 99¢

Le Grande Nectarines 5 Lb. 99¢

Green Bell Peppers 5 for 29¢

Fresh Corn 5 Ears 29¢

Large Golden Ears 5 Ears 29¢

Small Golden Ears 5 Ears 29¢

White Potatoes 10 Lbs. 59¢

Small White Potatoes 10 Lbs. 59¢

Large White Potatoes 10 Lbs. 59¢

Small White Potatoes 10 Lbs. 59¢

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Small White Potatoes 10 Lbs. 59¢

## La Pina FLOUR

25 Lb. 1.69

## Miscellaneous

**Sanford & Sons** 2-104  
**Sanford & Sons** 2-104  
**Sanford & Sons** 2-104  
**Sanford & Sons** 2-104

## Bread, Cookies, Spreads

**California Macaroni** 2-104  
**California Macaroni** 2-104  
**California Macaroni** 2-104  
**California Macaroni** 2-104

## Fresh Breads

**Butterfly** 3 for \$1

## For Tea & Coffee Time

**Butterfly** 3 for \$1

## More Frozen Foods

**Butterfly** 3 for \$1

**Butterfly** 3 for \$1

**Butterfly** 3 for \$1

**Butterfly** 3 for \$1

**Butterfly** 3 for \$1

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**Butterfly** 3 for \$1

## GREEN PEAS

25 Lb

competition on russets from Washington, Colorado and Oregon in these cities. Atlanta was chosen as a city representative of the Deep South.

The population of the 10 Metropolitan Statistical Areas studied is about 33 million or 18.4% of the nation's total.<sup>2</sup> The actual population that would be covered by the advertising included in this study would be considerably more because the food distribution facilities within the cities supply larger geographic areas than the Metropolitan Statistical Area as defined by the Bureau of the Census. This is particularly true in the West, in the cities of Los Angeles, San Francisco, Salt Lake City, Dallas and Denver. For example, distribution by chain stores out of Denver covers most of Colorado and parts of Nebraska, Wyoming and South Dakota. Distribution out of Salt Lake City covers most of Utah and Idaho, and parts of Wyoming, Colorado and Nevada. In the San Francisco Bay area a chain store headquarters in Oakland distributes to stores from the Oregon border to San Luis Obispo, 600 miles to the south. The actual population covered by the advertising included in this study is closer to 25% of the nation's population than it is to 18.4%. Table 2 shows the population of each Standard Metropolitan Statistical Area included in the study.

### PERCENT OF FOOD STORE BUSINESS

On the average, three-fourths of the dollar volume of retail food business in each area studied is done by the firms whose advertising is in the study. There is considerable variation between individual areas; the range being from 42% to 93%, Table 3. Generally, a lower percentage of food retailers are represented in the larger population concentrations, New York, Los Angeles and the San Francisco Bay Area. There are two principle reasons for this: (1) In the large urban complexes there are still many small

**Table 2—Populations of 10 Standard Metropolitan Statistical Areas Included in Advertising Study, 1960<sup>1</sup>**

Area Code	Name of Area	Population
0	Salt Lake City	383,035
1	San Francisco Bay Area (includes San Jose)	3,425,674
2	Los Angeles-Long Beach	6,742,696
3	Denver	929,383
4	Dallas	1,083,601
5	Minneapolis-St. Paul	1,482,030
6	Chicago	6,220,913
7	New York City	10,694,633
8	Atlanta	1,017,188
9	Kansas City, Kan.-Mo.	1,039,493
Total		33,018,646

<sup>1</sup>Source: Statistical Abstract of the United States, 1963, Table 10, pp. 13-18.

stores; the unavailability of land for large stores and parking in highly congested areas, the slowness of transportation for both customers and large supply trucks within these congested areas, and the immobility resulting from economic, sociological and institutional restrictions contribute to the continuation of small-store retailing in congested areas.<sup>3</sup> (2) The large metropolitan complexes cover such a vast geographic area that sizeable chain store or voluntary group operations can exist serving such a relatively restricted area within the metropolitan area, that area-wide advertising coverage would be wasteful for them.

<sup>2</sup>U.S. Dept. of Commerce, Bureau of the Census Statistical Abstract of the United States, 1963, pp 13-18, Population—Standard Metropolitan Statistical Areas—1960.

<sup>3</sup>A trend toward exceedingly large food stores in the "inner city" may be changing this as evidenced by the new, large sized, 40,000 square feet stores of Supermarket Operating Co. which have been recently opened in New York City.

**Table 3—Total Number of Retail Food Stores, Number Included in Study, and Volumes of Business in Ten Metropolitan Centers**

Area Code	Name of Area	Total Number of Retail Food Stores <sup>1</sup>	Number of Food Stores in Study <sup>1</sup>	Percent of Stores in Study	Total Dollar Volume of Retail Food Stores <sup>1</sup>	Dollar Volume of Store in Study <sup>2</sup>	Percent of Volume in Study
					(Add 000)	(Add 000)	
0	Salt Lake City	438	122	28	148,005	127,284	86
1	San Francisco Bay (includes San Jose)	4,688	364	8	1,636,268	692,141	42
2	Los Angeles-Long Beach	7,084	621	9	2,702,788	1,332,475	49
3	Denver	930	309	33	326,143	282,766	87
4	Dallas	1,476	175	12	390,262	265,378	68
5	Minneapolis-St. Paul	1,710	348	20	477,964	374,246	78
6	Chicago	8,739	1,405	16	2,141,957	1,501,512	70
7	New York City	24,431	1,733	7	4,004,030	2,174,188	54
8	Atlanta	1,458	305	21	333,373	307,370	92
9	Kansas City, Kan.-Mo.	974	296	30	352,701	328,365	93

Source: 1. U. S. Bureau of the Census, Census of Business, 1963, Retail Trade (for each state involved.)

2. Number of stores operating in Metropolitan Statistical Area for each advertiser comes from Metro Market Studies, Inc., 1965, Grocery Distribution Analysis and Guide, 6 Hollywood Drive, Dobbs Ferry, N. Y.

3. This figure is calculated from the two sources above. Metro Market Studies gives "Percent of Area Volume" for each firm operating in each area; "Total Dollar Volume of Retail Food Stores" was multiplied by the percentage representing the firms included in the study.



They advertise in smaller community newspapers within the urban complex. For example, Dan's Supreme Markets (nine stores) and Packer's Markets (eleven stores) operate within New York City but not in either area covered by the two newspapers subscribed to for this study. Chicago, the third largest population center, does not, for reasons unknown here, fit this generalization. Table 3 details the number of retail food stores operating in each of the ten areas and the number whose advertising is included in the study.

## MARKET ORGANIZATION

In order better to evaluate advertising practices it was deemed advisable to relate different types of practices to the importance of the retailing organization.<sup>4</sup>

The question of "importance to what" arises. Is it importance to the individual market, or is it importance to the national food retailing situation? Two different kinds of ratings were worked out, an A, B, C, D, rating based on the total size of the retailing organization and another rating of the importance of retailing organization in the individual market based on percentage of business done in the individual market, number of stores operating in it and average size of store.

Type A stores were those owned and operated by firms doing over \$1 billion annually; type B, by firms doing \$40 million to \$1 billion; type C by firms doing \$10 million to \$40 million, PLUS ALL COOPERATIVE AND VOLUNTARY GROUPS;<sup>5</sup> type D stores were all others, mostly independents or small chains doing under \$10 million.

<sup>4</sup>The term, "retailing organization," is used rather than "firm" or "chain" because it is more descriptive of the actual situation. In almost all markets, voluntary or cooperative groups of independent retail stores, or small chain and independent stores, act as a single buying and/or merchandising group, similar to a corporate chain store organization. Thus, a "retailing organization" can be a corporate chain store, it can be a single, or several, independently owned and operated stores, or it can be a group of independently owned and operated stores that have banded together as a voluntary or cooperative group. The distinction between a voluntary and cooperative group is that in a cooperative group the wholesale house is cooperatively owned by the retailers and any profit from the wholesale operation is returned to the retailers in proportion to their purchases from the wholesale operation. In a voluntary group, the wholesale house is a separate, for-profit, wholesale house which the retailer joins voluntarily to take advantage of group buying and merchandising, and any profit from the operation of the wholesale house goes to the owners, who may or may not be retailers. Voluntary and cooperative groups are identified in figures 3 through 12 and tables 4 through 13.

<sup>5</sup>Voluntary and cooperative groups were included in this category by an arbitrary decision of the researchers. While most members of voluntary and cooperative groups are individual store owners and would normally be classified in type D, they do advertise and run promotional gimmicks as a group which does make them different from individual stores operated independently. It is not exactly appropriate to bunch all voluntary and cooperative groups this loosely into one type but with limited knowledge of individual situations it is a workable differentiation. There is wide variation in the operation of voluntary and cooperative groups. At one extreme are operations like Super Valu of Hopkins, Minnesota, which has tight control of its voluntary members operating under the Super Valu name; many consumers are not aware that the Super Valu organization is not a corporate chain store; on the

In 1964 there were six corporate chain stores<sup>6</sup> that came into the type A group, A & P, Safeway, Kroger, National Tea, Acme-Alpha Beta, and Food Fair. At least one division, and in five of the six instances, several divisions of each of these firms were included in the study. In 1964 there were 81 type B chains.<sup>7</sup> Of these, 29 operated in one or more of the areas included in the study. It was more difficult to classify type C and type D stores as there is no published record on all markets; these classifications were made on subjective knowledge of each market and are more subject to error. However, while it is very likely that an error could be made in whether to assign an individual retailing organization to type C or to type D, it is highly improbable that there could be confusion in assigning it to types A or B, or that any retailing organization classified as C or D should have been A or B.

Appendix Tables 1 through 10 show this "national" rating along with the "local" rating of each firm in the market. In these tables each retailing organization is ranked by Percentage of Volume of Business which it does in the Area (PBA), by number of stores in the area and by Percentage of Volume per Store (PVS).<sup>8</sup>

Any one of these rankings taken by itself can give a misleading impression of competition. For example, if only PVA or number of stores were considered, an organization which has hundreds or thousands of very small stores could do a very large percentage of the total volume of business. Such an organization might not be considered as actively competitive by other retailing organizations because each unit is so small. Within this organization there may be some very large units, but they would only be competitive in a restricted local area. The organization as a whole would not be considered a competitive force in the mar-

other extreme are operations like Certified Grocers of California which does no advertising as a group and members do not even identify their stores under a standard name. There is similar wide variation between the same type of groups that advertise: IGA stores in Salt Lake City, a voluntary group, advertise the same size ads as big corporate chains operating in that area and advertise a complete food ad, including fresh meats and produce. On the other hand, Spot Lite Food Stores in Chicago, also a voluntary group, advertise national brand groceries but little or no meat or produce; these cannot be considered as complete food store ads, nor can they hardly be considered competitive ads in the Chicago market. While there are admitted weaknesses in lumping these groups together in type C, there seems to be no better way of doing it with the limited knowledge available. Perhaps further refinements will develop as the research continues. Another problem arises with voluntary and cooperative groups. It is not uncommon for one member of such a group to be a sizeable chain store in itself, but this chain store advertises with the group under the group name. The most obvious example of this is Supermarket Operating Co., a chain doing over \$100 million in sales in 1964. It is one member of Wakefern Foods, a cooperative wholesale organization in New Jersey. All food stores of Supermarket Operating Co. are under the Shop-Rite name and it would be impossible to separate this chain store from other Shop-Rite stores, so, in this study this large chain store is classified in type C rather than B.

<sup>6</sup>Super Market Merchandising, April, 1965, "Sales of Chains doing over \$20 Million Annually," p. 70.

<sup>7</sup>Ibid.

<sup>8</sup>This is the result of dividing PVA by number of stores.

ket to other area-wide retailing organizations. Such a situation could exist in San Francisco-San Jose (Appendix Table 2), in Los Angeles (Appendix Table 3), or Dallas (Appendix Table 5).

Similarly, PVS can be misleading. An organization with very few stores can do a tremendous volume of business per store, but, because there are so few stores the organization is not competitive area-wide, but only in the restricted areas where its stores are located. New York (Table 8) is an example of this. The retailing organization with the largest volume per store, Shoprite Stores operated by Supermarket Operating Co., had only six stores in that area. While these stores are no doubt a large competitive factor in the restricted local areas in which they operate, they could hardly be considered a competitive factor in the area-wide market when in competition with organizations such as A & P with 460 stores or Bohack with 230 stores in the same area.

It can be concluded, then, that none of these three ratings by itself is adequate to describe competitive importance of the organization, but that one of the conditions in a retailing organization being competitive in a marketing area is a combination of (1) number of stores—enough to cover the area; (2) a large comparative percentage of the total volume of business in the area (PVA); and (3) large volume of business per store (PVS). This third factor is, of course, a function of the other two. To work out this combination factor each retailing organization was ranked by the three individual factors and the rankings added. The resulting accumulated ranking is a function of all three factors rather than of any one singly. This is an unweighted ranking as no way was known of weighting the three individual factors. It is more significant as a measure of competitive effectiveness within a market than any of the individual factors. These two different estimates of competitive importance were worked out to test their correlation to competitive practices in different types of analyses.

It was felt that in the analysis of a factor that bears on the total organization, let us say procurement of private label canned goods where the size of the national organization would be a competitive advantage, the A, B, C, D rating would be used. In analysis of a local factor, such as movement of a local produce crop where only the size of the local division gives a competitive advantage, the cumulative rating for the individual market area would be used. A & P in New York and Los Angeles demonstrates this point. Being the largest chain it is an "A" type of retailing organization. In New York it is also top in the cumulative rating, but it is far down the list in Los Angeles where it is in a different competitive position than in New York.

## INDICATION OF CONCENTRATION

Figures 3 through 12 are a graphic presentation of the data on PVA of each retailing organization and the number of organizations operating in the area. This is similar data as presented in figures in the appendix. Each graph presents: (1) the number of major food retailing organizations operating in the area; (2) the number of those whose advertising is included and not included in the study and their relative size in the market; and (3) a measurement of the concentration of food retail dollar volume that exists in the market. In other words, they show whether a few firms dominate the market or whether all firms operating in the market are nearly equal in size.

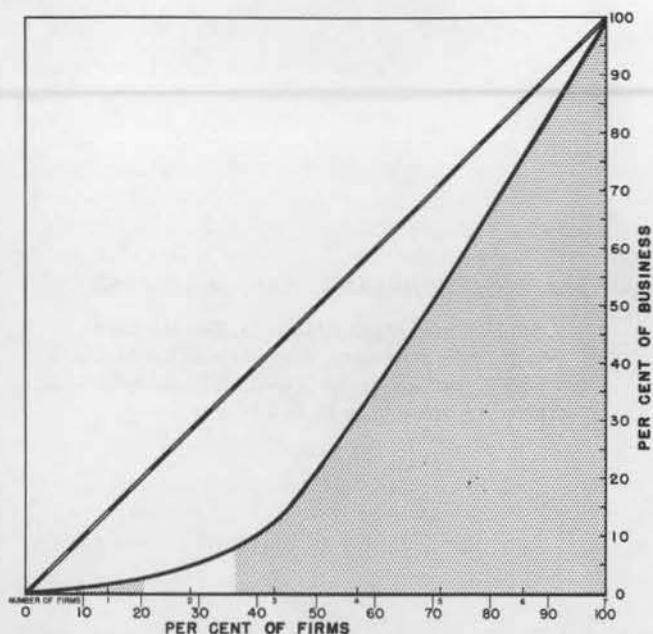
The x-axis (horizontal) of each graph is divided equally into the number of identifiable retailing organizations that exist in the market, assuming that those that are identifiable are 100% of the total. Generally, an organization has to do at least 1/10 of 1% (.1%) of the business in the area to be identifiable. The y-axis (vertical) is the percentage of retail food dollar volume in the market. The shaded area identifies those retailing organizations whose advertising is included in this study.

The diagonal dotted line is the curve that would result if each organization did an equal percentage of the business in the market and the cumulative total percentage were graphed. That is, if there were 100 retailing organizations in a market doing 100% of the business, and each one was equal to each other one, then 1% of the retailing organizations would do 1% of the business, 2% of them would do 2% of the business, etc. If the cumulative total of business done by all were graphed, the curve that resulted would be the diagonal dotted line. The solid curve in each graph is the cumulative percentage of business in the market that is actually done by the retailing organizations in the market. The distance between the solid curve and the dotted line is a measurement of concentration of business. The closer the curve is to the diagonal the less concentration there is; that is, each organization tends to be equal in size to each other one. The further the curve diverges from the diagonal, the more concentration there is; that is, a few organizations do a disproportionately large percentage of the business in relation to the number of retailing organizations operating in the market.

Complete data on the percentage of business done by each retailing organization are not available. Only the larger retailing organizations (those that do at least one-tenth of one percent of the volume in the area) are reported.<sup>9</sup>

(Text continues on page 21)

<sup>9</sup>Metro Market Studies, Inc., 1965, *Grocery Distribution Analysis and Guide*, published by Metro Market Studies, Inc., 6 Hollywood Drive, Dobbs Ferry, New York.



#### SALT LAKE CITY AREA

Counties included: Davis, Salt Lake  
1960 Population: 477,795  
Rank in Population: 62

Figure 3. Concentration of business, Salt Lake City area.

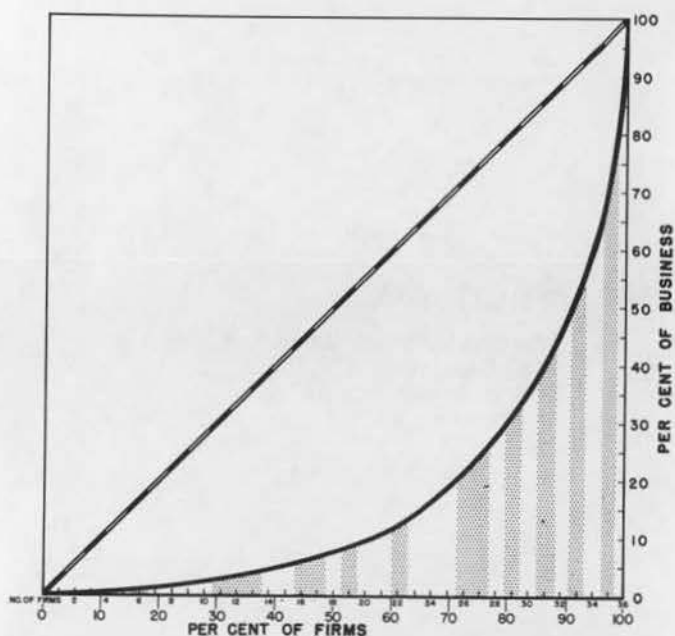
Major Food Retailing Organizations <sup>1</sup>	Number of stores in area serviced by retailing organization <sup>1</sup>			
	Area	% Volume <sup>2</sup>	Area	% Volume Converted to 100% <sup>2</sup>
			Stores Included In Study (Shaded Area)	Stores Not Included In Study
1. Foodtown, Inc.	0.9	1.0	2	
2. Dan's	3.1	3.5		3
3. IGA (vol.) Buy Rite	7	7.9	22	
4. Grand American Mkts. Mayfair Mkts. Valley Shopping Ctr.	16.6	18.6	16	
5. Albertson's Food Ctrs.	19.5	21.9	16	
6. A-G Stores (co-op) Foodtown	20	22.5	43	
7. Safeway	22	24.6	23	
TOTALS	89.1	100%	122	3

<sup>1</sup>/Of the 438 stores in the area these 125, 29% of the total number, do 89.1% of the dollar volume.

<sup>2</sup>/89.1% has been made equal to 100% on the vertical axis. Each percentage has been converted by multiplying by 1.12.

<sup>3</sup>/Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, N.Y.





#### SAN FRANCISCO-OAKLAND, SAN JOSE AREA

Counties included: Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara  
 1960 Population: SF-2,648,762; SJ-642,315  
 Rank in Population SF-7; SJ-35

Figure 4. Concentration of business, San Francisco Bay Area.

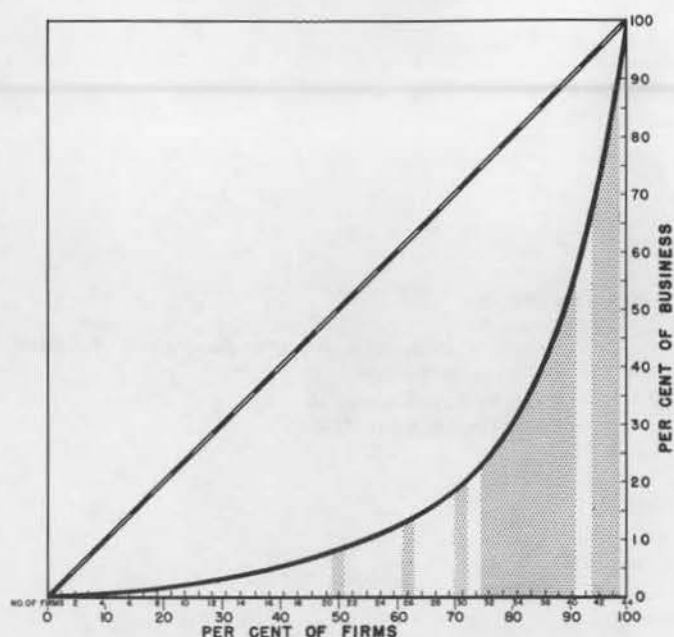
Major Food Retailing Organizations <sup>a</sup>	Area % Volume <sup>a</sup>	Area Volume Converted to 100% <sup>a</sup>	Number of Stores in Area serviced by retailing organization <sup>1</sup>	
			Stores Included In Study (Shaded Area)	Stores Not Included In Study
1. Semrau & Sons (Payless)	0.2	0.2		3
2. Piedmont Grocers	0.2	0.2		3
3. Morris & O'Brien (Super X)	0.2	0.2		3
4. Jolley Markets	0.2	0.2		2
5. Embee Grocery	0.2	0.2		2
6. Speedee Marts	0.3	0.3	34	
7. Key Sprmks.	0.3	0.3		4
8. Brentwood Markets	0.3	0.3		4
9. Lynch Foods (co-op)	0.4	0.4		2
10. All American Mkts.	0.4	0.4		6
11. Giant Super	0.4	0.4	2	
12. Raos	0.5	0.5	1	
13. Crown Sprmks.	0.5	0.5	4	
14. United Mkts. (Saccone Bros.)	0.5	0.5		4
15. Park & Shop Mkts.	0.5	0.5		3
16. PW Sprmks.	0.7	0.8	3	
17. Dick's Sprmks.	0.7	0.8	8	
18. Hob Nob	0.7	0.8		9
19. Giant Regal Food King	0.9	1.0	6	
20. Red & White Stores (vol.)	1.0	1.1		34
21. Russell's Mkts.	1.0	1.1		10
22. Fry's Food Stores	1.2	1.3	7	
23. U Save Centers	1.2	1.3		4
24. Quality Foods	2.0	2.2		7
25. Consumer (co-op)	2.2	2.4		11
26. Littleman Strs. (Cala)	2.5	2.7	22	
27. Lee Brothers (co-op)	2.7	2.9	22	
28. Louis Stores	3.2	3.5		40
29. Mayfair Mkts.	3.3	3.6	26	
30. P & X Markets	4.1	4.4		40
31. Purity Stores	4.2	4.6	40	
32. S. F. G. Stores (vol.)	5.7	6.2		280
33. Lucky Stores	7.1	7.7	50	
34. Allied Food Strs. (co-op)	7.5	8.1		452
35. Safeway Stores	17.3	18.8	139	
36. United Grocers (co-op)	18.0	19.6		1600
TOTALS	92.3	100%	364	2533

<sup>1</sup>Of the 4688 stores in the area these 2897, 62% of the total number, do 92.3% of the dollar volume.

<sup>2</sup>92.3% has been made equal to 100% on the vertical axis. Each percentage has been converted by multiplying by 1.08.

<sup>3</sup>Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, N.Y.





### LOS ANGELES AREA

Counties included: Los Angeles, Orange  
1960 Population: 6,742,696  
Rank in Population: 2

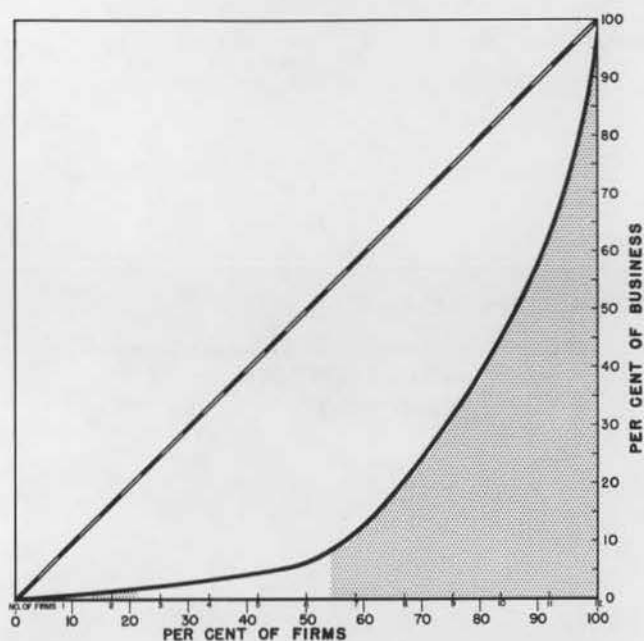
Figure 5. Concentration of business, Los Angeles area.

Major Food Retailing Organizations <sup>2</sup>	Area	% Volume <sup>3</sup>	Area % Volume Converted to 100% <sup>2</sup>	Number of stores in area serviced by retailing organization <sup>1</sup>	
				Stores Included In Study (Shaded Area)	Stores Not Included In Study
1. Speede Marts	.1	.1	.1		31
2. Shopping Basket	.1	.1	.1		2
3. Lee R. Bishop Co.	.2	.2	.2		4
4. Jim's	.2	.2	.2		3
5. Esko	.2	.2	.2		3
6. Daylight Sprmks.	.2	.2	.2		2
7. Community Markets	.2	.2	.2		5
8. Sav Mor	.3	.3	.3		6
9. Jurgensen's	.3	.3	.3		13
10. El Rancho	.3	.3	.3		3
11. Westward Ho (co-op)	.4	.4	.4		4
12. Stater Bros.	.4	.4	.4		8
13. Gateway Markets	.4	.4	.4		9
14. Shop-Rite Mkts. (co-op)	.5	.5	.5		7
15. Piggly Wiggly Calif. (co-op)	.5	.5	.5		8
16. Michael's Markets	.5	.5	.5		8
17. Foods Company	.5	.5	.5		8
18. Crawford Stores (co-op)	.5	.5	.5		5
19. Coles Markets	.7	.7	.7		9
20. Pantry Food Mkts. (co-op)	.8	.8	.8		13
21. Dales Food Markets	.9	.9	.9	14	
22. McCoy's Markets	1.0	1.0	1.0		15
23. Greater All American Markets (co-op)	1.0	1.1	1.1		14
24. Better Food Markets	1.0	1.1	1.1		10
25. Alexander's Mkts. (vol.)	1.0	1.1	1.1		12
26. A & P	1.0	1.1	1.1	19	
27. Supreme F-G Ranch	1.2	1.3	1.3		9
28. Food Fair	1.4	1.5	1.5		22
29. Shoppers Markets (co-op)	1.6	1.7	1.7		14
30. Lucky Stores	1.7	1.8	1.8	26	
31. Hughes Markets (co-op)	1.8	1.9	1.9		15
32. The Boy's Markets (co-op)	2.2	2.3	2.3	22	
33. Mayfair Markets	2.6	2.7	2.7	29	
34. Food Giant Mkts. (co-op)	4.2	4.4	4.4	48	
35. Thriftmart	4.4	4.6	4.6	57	
36. Market Basket (Kroger)	4.6	4.8	4.8	53	
37. Alpha Beta Acme	5.4	5.7	5.7	80	
38. Ralph's Grocery	6.0	6.3	6.3	46	
39. Orange Empire (co-op)	7.0	7.3	7.3		750
40. Von's	8.0	8.4	8.4	79	
41. Safeway	8.3	8.7	8.7	148	
42. Certified Grocers (co-op)	22.0	23.0	23.0		2,160
Spartan Stores					
TOTALS	95.6	100%		621	3,172

<sup>1</sup>/Of the 7,084 stores in the area of these 3,793, 54% of the total number, do 95.6% of the dollar volume.

<sup>2</sup>/95.6% has been made equal to 100% on the vertical axis. Each percentage has been converted by multiplying by 1.04.

<sup>3</sup>/Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, N.Y.



#### DENVER AREA

Counties included: Adams, Arapahoe, Boulder, Denver, Jefferson  
 Rank in Population: 26  
 1960 Population: 929,383

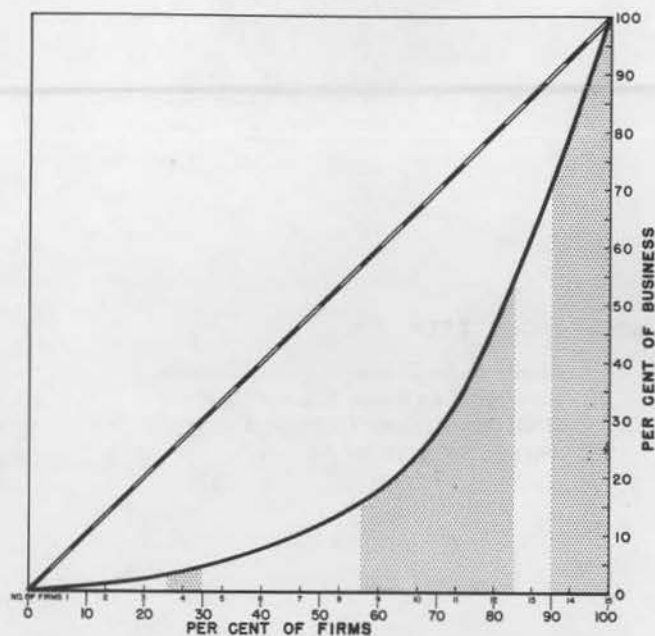
Figure 6. Concentration of business, Denver area.

Major Food Retailing Organizations <sup>1</sup>	Area % Volume <sup>2</sup>	Area Volume Converted to 100% <sup>2</sup>	Number of stores in area serviced by retailing organization <sup>1</sup>	
			Stores Included In Study (Shaded Area)	Stores Not Included In Study
1. Super Saver Markets	.7	.7		3
2. Buddy & Lloyd's (co-op)	.7	.7	3	
3. Big Top	.7	.8		13
4. Utote'em	.9	1.0		16
5. Ideal Markets (co-op)	1.0	1.1		3
6. Seven Eleven	2	2.2		35
7. Furr's	4	4.4	8	
8. Red Owl (vol.)	10.0	10.9	15	
9. King Soopers	11	12	14	
10. A-G Stores (co-op)	12	13	182	
11. Miller's Supermarkets (National Tea)	15	16.3	31	
12. Safeway	34	36.9	56	
TOTALS	92	100%	309	70

<sup>1</sup>/Of the 930 stores in the area these 379, 40% of the total number, do 92% of the dollar volume.

<sup>2</sup>/92% has been made equal to 100% on the vertical axis. Each percentage has been converted by multiplying by 1.09.

<sup>3</sup>/Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, N.Y.



#### DALLAS AREA

Counties included: Collin, Dallas, Denton, Ellis  
 1960 Population: 1,083,601  
 Rank in Population: 20

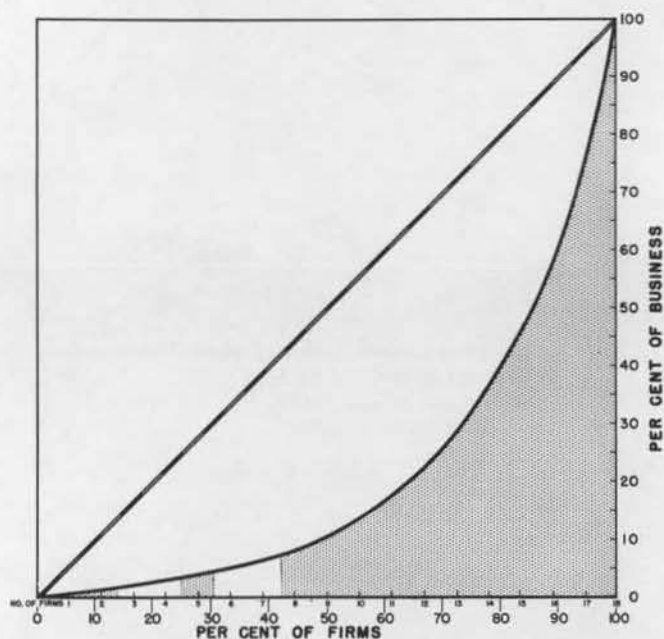
Figure 7. Concentration of business, Dallas area.

Major Food Retailing Organizations <sup>1</sup>	Number of stores in area served by retailing organization <sup>1</sup>			
	Area	% Volume <sup>2</sup>	Stores Included In Study (Shaded Area)	Stores Not Included In Study
1. Piggly Wiggly	0.2	0.2		4
2. Cliff Food Stores (co-op)	0.8	0.8		3
3. Super Save (vol.)	1.0	1.0		20
4. Buddie's	1.0	1.1	4	
5. Hodge's Sprmks.	1.9	2.0		6
6. Big 'D' Federated (vol.)	2.5	2.6		105
7. 7-Eleven Strs. & Cabells	2.6	2.7		135
8. White's	2.8	2.9		6
9. Worth Food Mart	4	4.2	16	
10. Minyard's Stores (co-op)	5	5.2	14	
11. Tom Thumb Sprmks.	11	11.4	29	
12. Wyatt Food Strs. (Kroger)	13	13.5	29	
13. Affiliated Food Stores (co-op)	16.5	17.1		281
Thriftway Stores (includes: L&S, H&H, Food Basket)				
14. Safeway	17	17.6	39	
15. A & P	17	17.7	44	
TOTALS	96.3	100%	175	560

<sup>1</sup>/Of the 1476 stores in the area these 735, 50% of the total number, do 96.3% of the dollar volume.

<sup>2</sup>/96.3% has been made equal to 100% on the vertical axis. Each percentage has been converted by multiplying by 1.04.

<sup>3</sup>/Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, N.Y.



#### MINNEAPOLIS AREA

Counties included: Anoka, Dakota,  
Hennepin, Ramsey, Washington  
1960 population: 1,482,030  
Rank in population: 14

Figure 8. Concentration of business, Minneapolis area.

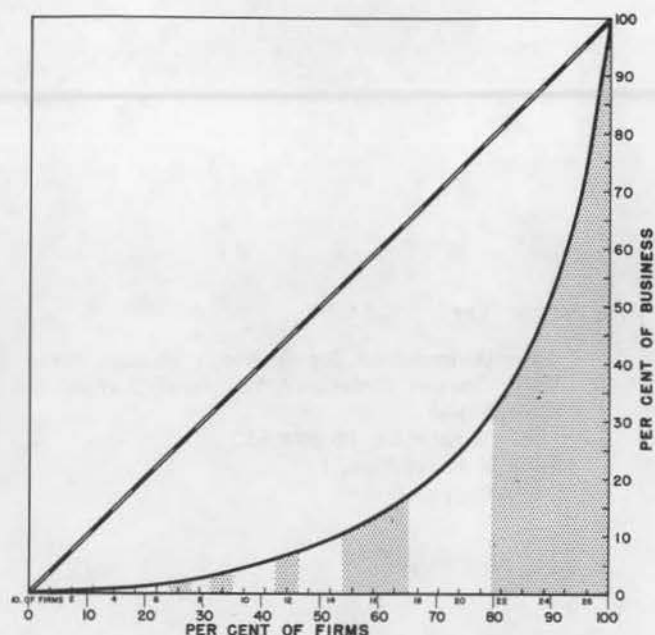
Major Food Retailing Organizations <sup>3</sup>	Number of stores in area serviced by retailing organization <sup>1</sup>	
	Area % Volume <sup>2</sup>	Area % Volume Converted to 100% <sup>2</sup>
1. Glewwe's Markets	.4	.5
2. Theisen's	.7	.9
3. Rooney's	.8	.9
4. Knowlan's Sprmks.	.8	1.0
5. Jerry's	.8	1.0
6. Red & White (vol.)	.9	1.1
Lucky Dollar		
7. Jensen's Super Valu	1.1	1.3
8. Kroger	1.4	1.7
9. Shoppers City	2	2.4
10. IGA (vol.)	2	2.4
Big Ten Stores		
Mayfair		
11. Foodtown Sprmks.	3.6	4.4
12. Fairway (co-op)	4.8	5.8
Super Fair		
13. Penny's Sprmks.	5	6.1
14. Country Club Markets	6	7.3
15. Applebaum's	7	8.5
16. National Tea	11	13.4
Including Del Farm		
17. Super Valu	13	15.8
18. Red Owl	21	25.5
TOTALS	82.3	100%

<sup>1</sup>/Of the 1,410 stores in the area these 377, 22% of the total number, do 82.3% of the dollar volume.

<sup>2</sup>/82.3% has been made equal to 100% on the vertical axis. Each percentage has been converted by multiplying by 1.21.

<sup>3</sup>/Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, N.Y.





#### CHICAGO AREA

Counties included: Cook, Dupage, Kane, Lake, McHenry, Will  
1960 Population: 6,220,913  
Rank in Population: 3

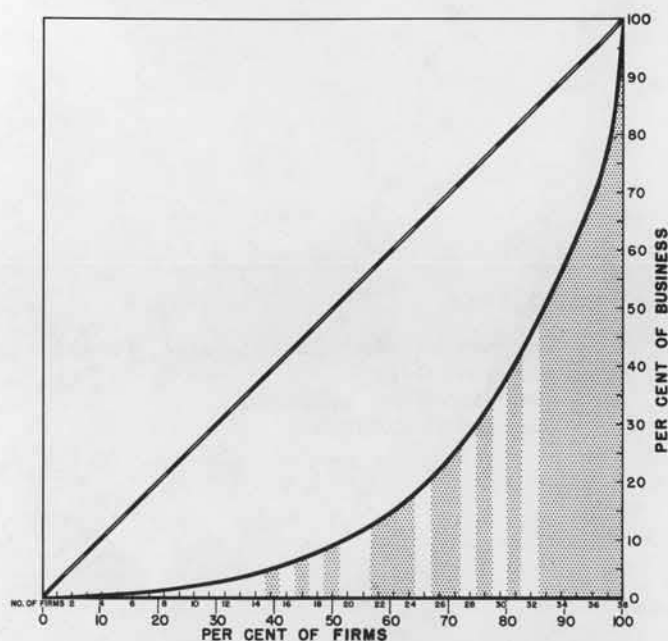
Figure 9. Concentration of business, Chicago area.

Major Food Retailing Organizations <sup>1</sup>	Area % Volume <sup>2</sup>	Area Volume Converted to 100% <sup>2</sup>	Number of stores in area serviced by retailing organization <sup>1</sup>	
			Stores Included In Study (Shaded Area)	Stores Not Included In Study
1. Vito's Markets	.2	.2		4
2. M. Muskal Grocery	.2	.2		10
3. D & S	.2	.2		4
4. Janson's Fine Foods	.3	.3		6
5. Clover Farm Stores (vol.)	.3	.3		70
6. State Food Stores (vol.)	.4	.4		85
7. Pick'n Save Foods	.4	.4	12	
8. Associated Grocers (vol.)	.5	.5		100
9. Thriftway Foods (vol.)	.7	.7	150	
10. IGA (vol.)	.7	.7		90
11. United Food Stores (vol.)	1.5	1.5		200
12. Savory Food Stores (vol.) Richmor	1.6	1.6	300	
13. Piggly Wiggly Eagle	1.6	1.6		22
14. Progressive Food Stores (co-op) Pretty Penny	1.7	1.7		150
15. Banner Food Stores (vol.)	1.7	1.7	150	
16. Dominicks	1.9	1.9	10	
17. Hillman's	2.2	2.2	15	
18. Cardinal Food Stores (vol.) Royal Blue Stores	2.5	2.5		475
19. Spot Lite Food Stores (vol.)	3.0	3.0		500
20. Grocerland (co-op)	3.4	3.5		375
21. Central Food Stores	3.5	3.6		340
22. Kroger	4.5	4.7	59	
23. High Low Foods	4.8	4.9	57	
24. Certified Grocers (co-op)	8.5	8.6		500
25. A & P	12.5	12.7	181	
26. National Tea (Del Farm)	17.8	18.1	234	
27. Jewel Tea Co.	22	22.3	237	
TOTALS	98.6	100%	1,405	2,931

<sup>1</sup>/Of the 8,739 stores in the area these 4,336, 50% of the total number, do 98.6% of the dollar volume.

<sup>2</sup>/98.6% has been made equal to 100% on the vertical axis. Each percentage has been converted by multiplying by 1.01.

<sup>3</sup>/Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, N.Y.



#### NEW YORK AREA

Counties included: Bronx, Kings, Nassau, New York, Queens, Richmond, Rockland, Suffolk, Westchester

1960 Population: 10,694,633

Rank in Population: 1

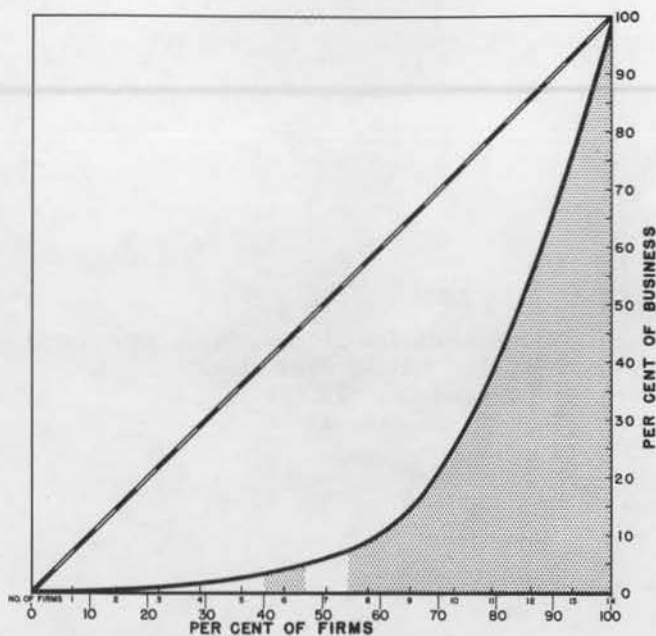
Figure 10. Concentration of business, New York area.

Major Food Retailing Organizations <sup>a</sup>	Number of stores in area serviced by retailing organization <sup>1</sup>		Stores Included In Study (Shaded Area)	Stores Not Included In Study
	Area	% Volume <sup>a</sup>		
1. Scaturro's	.1	.1		6
2. Pick Quick Sprmks.	.1	.1		9
3. Peter Reeves Mkts.	.2	.2		41
4. Bernstein Bros.	.2	.2		13
5. Elner & Pike	.2	.2	.9	7
6. Cracker Barrel, Inc.	.2	.2		7
7. Blue Jay Mkts. (co-op)	.2	.3		10
8. Spinner's Markets	.3	.4		250
9. Magnet Stores (vol.)	.3	.4		10
10. Fedco Corp.	.3	.4		9
11. D'Agostino Bros.	.3	.4		14
12. Sloan's Sprmks.	.4	.6		25
13. Royal Farms	.4	.6		14
14. Mandell	.4	.6		
15. Dilbert's	.4	.6	24	
16. Bernice Foods (vol.)	.4	.6		200
17. Acme	.4	.6	11	
18. Mother's Best (vol.)	.5	.7		150
19. Supermarkets Oper. Co. (Shoprite)	.7	1.0	6	
20. Dan's Supreme Mkts.	.9	1.3		18
21. Packer's Sprmks.	1.1	1.5		32
22. Smilen-Big Apple	1.3	1.8	35	
23. Sunbeam-IGA (vol.)	1.5	2.1	120	
24. Gristede Bros.	1.5	2.1	100	
25. Pioneer Food Stores (co-op)	1.6	2.3		115
26. King Kullen	1.6	2.3	44	
27. Food Fair	2.4	3.4	51	
28. United Food Stores (vol.)	2.5	3.5		700
29. Waldbaum	2.9	4.1	60	
30. Key Food Stores (co-op)	3.0	4.2		175
31. Daitch Shopwell	3.1	4.4	96	
32. Met Foods (vol.)	3.5	4.9		80
Independents				
33. Associated Food Stores (co-op)	3.6	5.1	240	
34. Grand Union	4.6	6.5	107	
35. First National	4.6	6.5	123	
36. Hill's & Korvette's	4.7	6.6	44	
37. H. C. Bohack	4.7	6.6	203	
38. A & P	16.1	22.6	460	
TOTALS	71.2	100%	1,733	1,885

<sup>1</sup>/Of the 24,431 stores in the area these 3,618, 15% of the total number, do 71.2% of the dollar volume.

<sup>2</sup>/71.2% has been made equal to 100% on the vertical axis. Each percentage has been converted by multiplying by 1.40.

<sup>3</sup>/Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, N.Y.



#### ATLANTA AREA

Counties included: Clayton, Cobb, Dekalb,  
Fulton, Gwinnett  
1960 Population: 1,017,188  
Rank in Population: 24

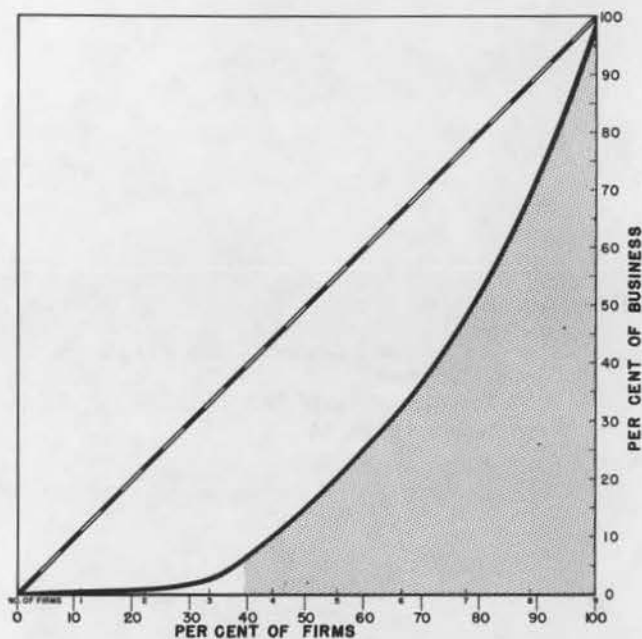
Figure 11. Concentration of business, Atlanta area.

Major Food Retailing Organizations <sup>1</sup>	Number of stores in area served by retailing organization <sup>2</sup>			
	Area % volume <sup>1</sup>	% volume converted to 100% <sup>2</sup>	Stores Included In Study (Shaded Area)	Stores not included in study
1. Crook's Foodtown (co-op)	0.4	0.4		2
2. Blair Sprmks. (co-op)	0.4	0.4		1
3. Pot 'O' Gold Dairy Strs.	0.5	0.5		7
4. Harris Sprmks.	0.7	0.7		3
5. Echol's Ma-Jik Mkts.	1	1		22
6. Buehler Sprmks.	1.2	1.2	3	
7. E-Z Food Shops	1.6	1.7		30
8. IGA (vol.) Simpson's IGA Tuxedo IGA	4	4.1	14	
9. Winn Dixie	4.5	4.7	12	
10. Foodtown (co-op) Red Dot Handy Pantry A-G	9	9.3	119	
11. Kroger	12.5	12.9	23	
12. Big Apple	18	18.6	39	
13. A&P	20	20.7	43	
14. Colonial Stores	23	23.8	52	
TOTALS	96.8	100%	305	65

<sup>1</sup>/Of the 1458 stores in the area these 370, 25% of the total number, do 96.8% of the dollar volume.

<sup>2</sup>/96.8% has been made equal to 100% on the vertical axis. Each percentage has been converted by multiplying by 1.03.

<sup>3</sup>/Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, N.Y.



#### KANSAS CITY AREA

Counties included: Johnson, Wyandotte (Kans.),  
Cass, Clay, Jackson, Platte (Mo.)  
1960 Population: 977,734  
Rank in Population: 23

Figure 12. Concentration of business, Kansas City area.

Major Food Retailing Organizations <sup>1</sup>	Number of stores in area served by retailing organization <sup>1</sup>			
	Area % Volume <sup>2</sup>	Area % Volume Converted to 100% <sup>2</sup>	Stores Included In Study (Shaded Area)	Stores Not Included In Study
1. Hy-Klas	.6	.6	36	
2. 7-Eleven	.8	.8		10
3. Grandview United Supermarket (vol.)	1	1.1		4
4. Milgram Food Stores	9	9.5	23	
5. Kroger	9	9.5	25	
6. Food Fest (vol.)	11.5	12	40	
Buyway Stores				
United Supermarkets				
7. A & P	16	16.9	37	
8. Safeway	18	19	41	
9. Muelbach (co-op)	29	30.6	94	
Justrite Stores				
Mr. A. G. Stores				
Thriftway Food Stores				
Wolferman				
Montell's Sprmks.				
TOTALS	94.9	100%	296	14

<sup>1</sup>/Of the 974 stores in the area these 310, 32% of the total number, do 94.9% of the dollar volume.

<sup>2</sup>/94.9% has been made equal to 100% on the vertical axis. Each percentage has been converted by multiplying by 1.04.

<sup>3</sup>/Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, N.Y.



Retailing organizations that are not included in the data in Figures 3 through 12 are generally very small independent stores that are not members of a cooperative or voluntary buying organization. For example, of the 438 stores in the Salt Lake City Metropolitan Statistical Area (Table 3) the 125 for whom data are graphed in Figure 3 do 89.1% of the business in the area; the other 313 stores do only 10.9%; 29% of the stores do 89% of the business.

In each graph the vertical axis of 100% represents 100% of the volume of business for the retailing organizations reported, not 100% of the market. In Figure 3, again for example, 100% on the vertical axis represents 89.1% of the total volume of business in the area. In Figure 10, New York City, 100% on the vertical axis represents only 71.2% of the volume of business in the area. In Figure 11, Atlanta, 100% on the vertical axis represents 96.8% of retail food store sales.

If complete data were available from all retailing organizations in each area, the solid line curve would shift to the right in all cases, showing more concentration than these graphs show. The amount of the shift would be negatively correlated with the percentage of the total market volume reported. It would shift farther to the right for New York City, where only 71% of total volume is considered, than in Atlanta, where 96% is included.

Among these 10 markets Salt Lake City (Figure 3) and Kansas City (Figure 12), the markets with the least number of retailing organizations, show the least concentration; San Francisco (Figure 4), Los Angeles (Figure 5) and Chicago (Figure 9), markets with large numbers of retailing organizations, show the most concentration. New York, a city with a large number of firms, would probably show a similar degree of concentration to San Francisco, Los Angeles and Chicago if as large a percentage of its total business were reported.

## **MARKET ORGANIZATION AND COMPETITION**

Neither the number of organizations operating in a market, percentage of total business per organization, percentage of total business per store nor degree of seller concentration are indices of degree of competition. Only a study of market conduct can determine the degree of competition. It is a misconception to conclude that because there are only a few sellers in a market there is a lessening of competition. Just the opposite may be true. For example, Salt Lake City and Kansas City are the markets with the fewest number of retailing organizations (and they are also the ones showing the least amount of concentration of business). Because there are so few firms, and because each is essentially equal

to each other in that market, they can operate in at least two different ways: (1) They can be intensely competitive, fighting each other for the business that is there, or (2) they can maintain prices slightly higher than they might under more active competition but not high enough to entice any newcomers into the market. Only a study of their competitive practices will tell which direction they have taken in this market.

Similarly, it is fallacious to conclude that because there is high seller concentration in a market there are only a few firms operating and/or high concentration means a lessening of competition. New York shows a high concentration of sellers with a large number of retailing operations in the market. But one firm is obviously dominant. As in the case above, there are at least two courses of conduct possible in this situation: (1) the firm that is dominant holds this position because it is so competitive and keeps margins so low that other firms can't make appreciable gains against it, or (2) if the firm is so firmly entrenched that other firms can't encroach on its position this one firm will act as a price-leader. Only an analysis of the conduct in the market can determine the degree of active competition.

Therefore, because neither the number of organizations operating in the market, percentage of total business per organization, percentage of total business per store, nor degree of concentration gives us a measure of competition, this research was undertaken to determine the degree of competition in food retailing from objective analysis of conduct and to correlate this, if possible, with other objective factors.

Competition may be of two general types—price competition or competition on other factors, such as location, service, and psychological values. This report is an analysis of some of the factors, other than price, that can be quantified from retailer advertising.

## **IMPORTANCE OF NON-FOOD PROMOTION**

The considerable amount of advertising space of food retailing organizations devoted to promotional gimmicks that are not at all or only vaguely related to selling food indicates they are an important competitive weapon. Promotional "gimmicks" include trading stamps; money games such as Bonanza, TV Bingo, and Pot-O-Gold; raffles of such things as vacations, automobiles, fur coats and ducklings; entertainment such as kiddie rides, celebrity appearances and free or reduced-price tickets to athletic events and concerts; and free or reduced prices on kitchenware, books and linens; etc.

Only the meat and grocery departments are more important than promotional gimmicks in food store advertising according to the space de-

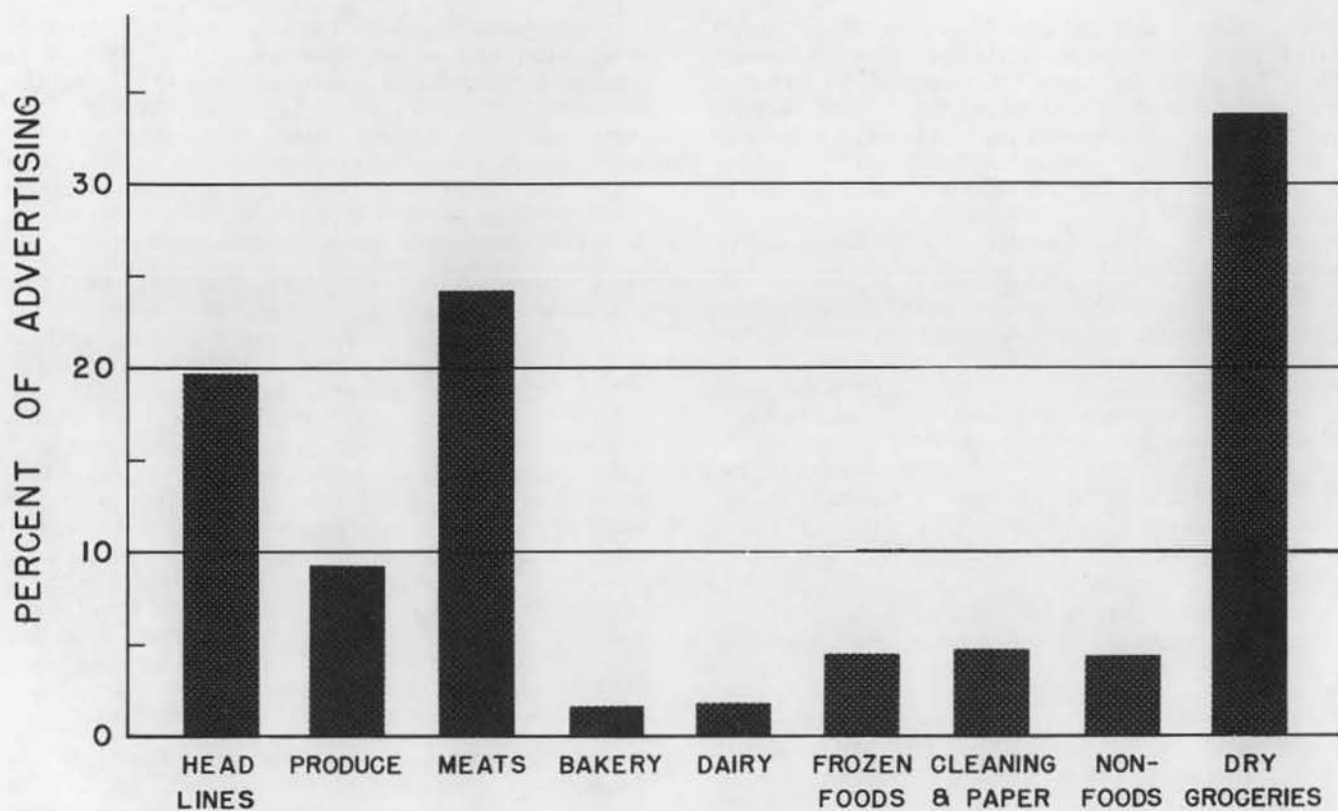


Figure 13. Average percentage\* of advertising space devoted to various departments in retail food stores, 1963-64.

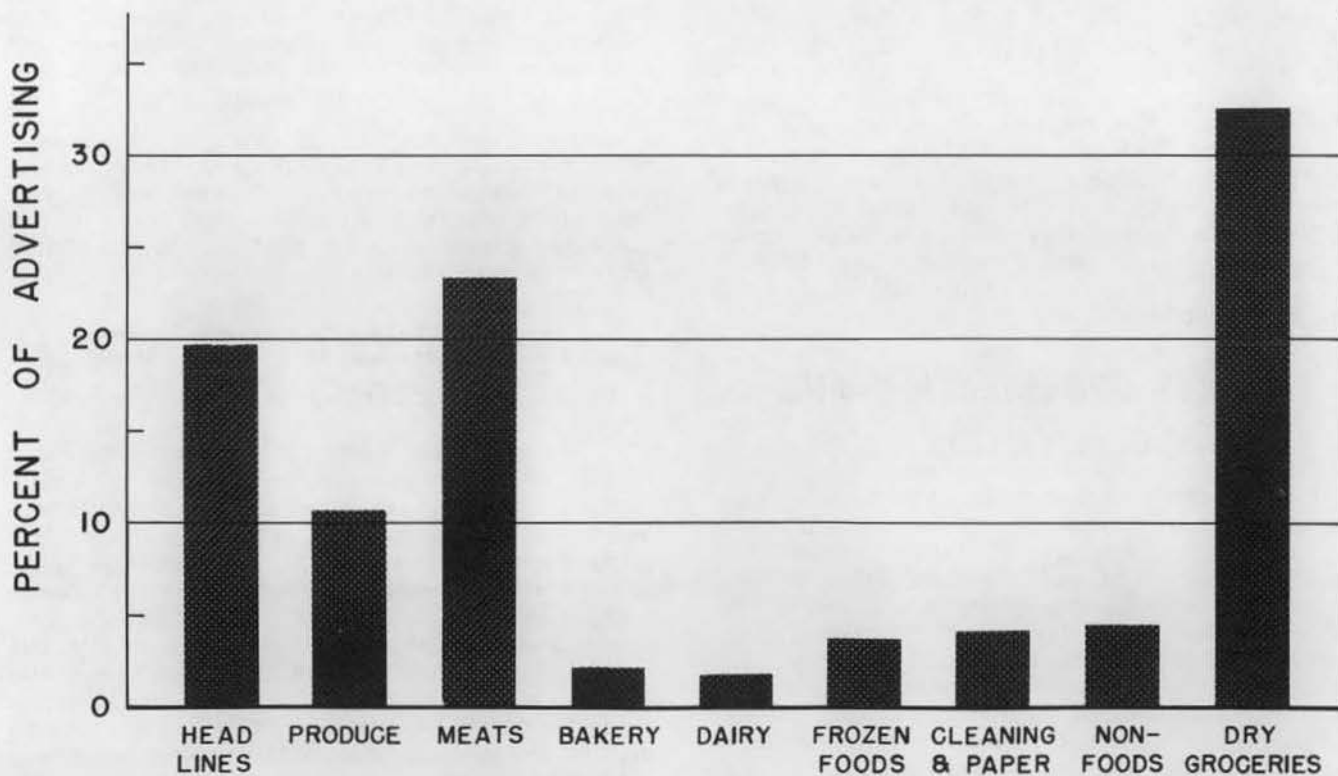


Figure 14. Average percentage\* of advertising space devoted to various departments in type "A" retail food stores, 1963-64.

\*Percentages can add to more than 100% because some frozen food is included in two categories.

voted to them in food store advertising. Promotional gimmicks were included for measurement in an umbrella category, "Headlines."<sup>10</sup> On the average, 20% of space in food store ads is devoted to Headlines, of which a minimum of 60%, or 12% of the space, is estimated to be devoted to promotional gimmicks. There is some variation among markets on the amount of space devoted to Headlines, which ranges from a low of 15% in San Francisco-San Jose to a high of about 28% in Dallas. This variation between markets is a direct reflection of the emphasis put on promotional gimmicks in the different markets.

## SPACE FOR PROMOTIONALS BY TYPE OF RETAILING ORGANIZATION

Figures 13 through 17 show that about the same percentage of ad space, 20%, is devoted to Headlines in the ads by each type of retailing organization.

It is interesting to note, in this connection, the varying emphasis in advertising for different departments by different types of retailing organizations. About the same percentage of space is used for meats and headlines by all types of retailing organizations, but the A and B type organizations use more space for advertising produce while the C and D types use less space for produce and more for dry groceries. This emphasis on produce by the larger organizations is probably due to their better integrated produce procurement systems which give them an advantage in quality and timing, if not also in price.<sup>11</sup>

Similarly, the emphasis on dry groceries in advertising by the smaller organizations is probably due to the fact that they can't compete as effectively on perishables.<sup>12</sup>

## TYPES OF PROMOTIONALS

Probably a better indication of the importance of promotional gimmicks than the percentage of space devoted to them is the percentage of ads used to present them. Only 49% of all ads (Figure 18) do not have a promotional gimmick in them meaning, of course, that 51% do.

For ease of analysis the special promotional gimmicks were divided into three different types; special stamp promotions, non-stamp coupons<sup>13</sup> and other special promotions.<sup>14</sup>

<sup>10</sup>Under Headlines was included not only the headlines of the ad and any pictures pertaining to the ad theme, but also space devoted to the store name, address and phone and all space devoted to promotions not connected with the selling of an item. Readers estimated that 60% of the space under "Headlines" was devoted to promotional gimmicks.

<sup>11</sup>William E. Folz and Alden C. Manchester, *Chainstore Merchandising and Procurement Practices, The Changing Retail Market for Fresh Fruits and Vegetables*, Marketing Research Report No. 417, U.S.D.A., Washington 25, D.C., page 21.

<sup>12</sup>*Ibid*, p. 13

Approximately 26% of all ads presented a special stamp promotion (if stamps were merely mentioned in the ad it was not counted as a special stamp promotion); 8%, non-stamp coupons and 28%, some other special promotion.<sup>15</sup>

The emphasis on promotional gimmicks varies by type of retailing organization. There is a direct relationship; the larger the retailing organization the more special promotional gimmicks used. Figure 19 shows the relationship.<sup>16</sup> Type A retailing organizations use considerably more of these than type B, which uses more than C, which uses more than D.

<sup>13</sup>Non-stamp coupons are coupons of the retail store, not of a manufacturer, offering cents-off or something free, other than stamps, when the coupon in the ad is presented at the store within a certain time limit.

<sup>14</sup>A partial list of such promotions, which are nearly limitless, would include: MONEY GAMES, such as Spell C-A-S-H, Split the Dollar, Hit 100, Sweepstakes, Jackpot, Horse Race, Spell-a-Priz, Treasure Hunt, Bonanza, Gold Rush, Sac-a-Dough, Cash Bonus, TV Bingo, Golden Envelope, Red Carpet and Wheel-of-Fortune; NON-FOOD MERCHANDISE DRAWINGS such as drawings for fur coats, automobiles, watches, free fuel, puppies, ducklings, ponies, vacations, boats, summer homes, wardrobes, 1 million stamps, free telephone service and cash; BOOKS, either free or at a reduced price, in a series so as to bring customers back to the store periodically, such as cook books, atlases, children's books, encyclopedias, nature books and books on religion; TICKETS, such as free or reduced price tickets to concerts, operas, stage plays, sporting events, fairs and amusement parks; HOUSEWARES, either free or at a reduced price in a series to keep customers coming back into the store periodically, such as dinnerware, silverware, glassware, cookware, and linens; DRAWINGS FOR FOOD, and ALL OTHER PROMOTIONS such as free orchids, cooking schools, toys, pony rides, celebrity appearances, free dinners, free records, "Store of Week" contest, "Most Popular Checker" contest, sports, clinics, discounts on furs and flat discount on all purchases.

The above items were tabulated for a period of 10½ months during this study and of the total number of promotions the percentage of each type was as follows: MONEY GAMES, 35% of total number of ads advertising a promotion; NON-FOOD MERCHANDISE DRAWINGS, 14% of total number of ads advertising a promotion; BOOKS, 15%; TICKETS, 7%; HOUSEWARES, 17%; DRAWINGS FOR FOOD, 3%; ALL OTHER PROMOTIONS, 9%.

<sup>15</sup>49% with no special promotion, 26% with a special stamp promotion, 8% with nonstamp coupons and 28% with another type of special promotion add up to more than 100% of all ads. This is possible because some ads presented more than one type of special promotion. The extreme of multiple promotions was the chain store ad featuring a money game and including a continuing dinnerware promotion, a continuing book promotion, tickets for the local baseball club at reduced prices with certain purchases and a special stamp deal.

<sup>16</sup>Because of the way the data were collected it was not possible to count the number of ads of each type of retailing organization that had a special promotion; only the total number of promotions and total number of ads are known for each type of retailing organization. The total number of promotions was divided by the total number of ads to get the percentage shown in Figure 19. If each ad had two special promotions in it, this percentage could be 200%; if each ad had three special promotions in it, this percentage could be 300%. Thus, not actually 99% of the ads of type A organizations had a special promotion in them; more likely about 70% or 80% did, with some of these presenting 2 or 3 promotions rather than 1. When the total number of promotions counted in this way is divided by the total number of ads the percentage figure that results is 62% rather than the known figure of 51% of ads with a special promotion in them (Figure 18). Thus, at the maximum, 11% of ads could have had two promotions in them; a smaller percentage of ads could have had two or three or four promotions in them.



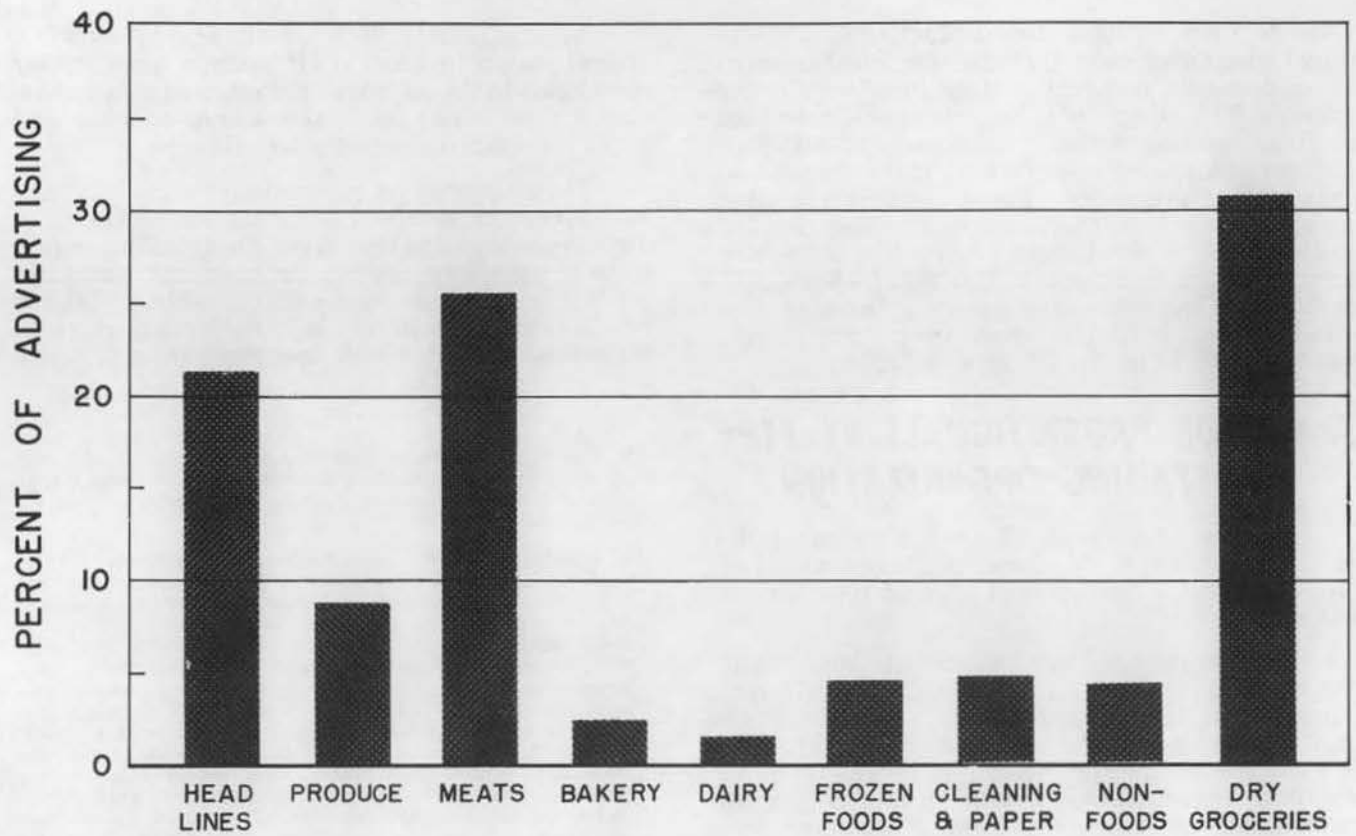


Figure 15. Average percentage\* of advertising space devoted to various departments in type "B" retail food stores, 1963-64.

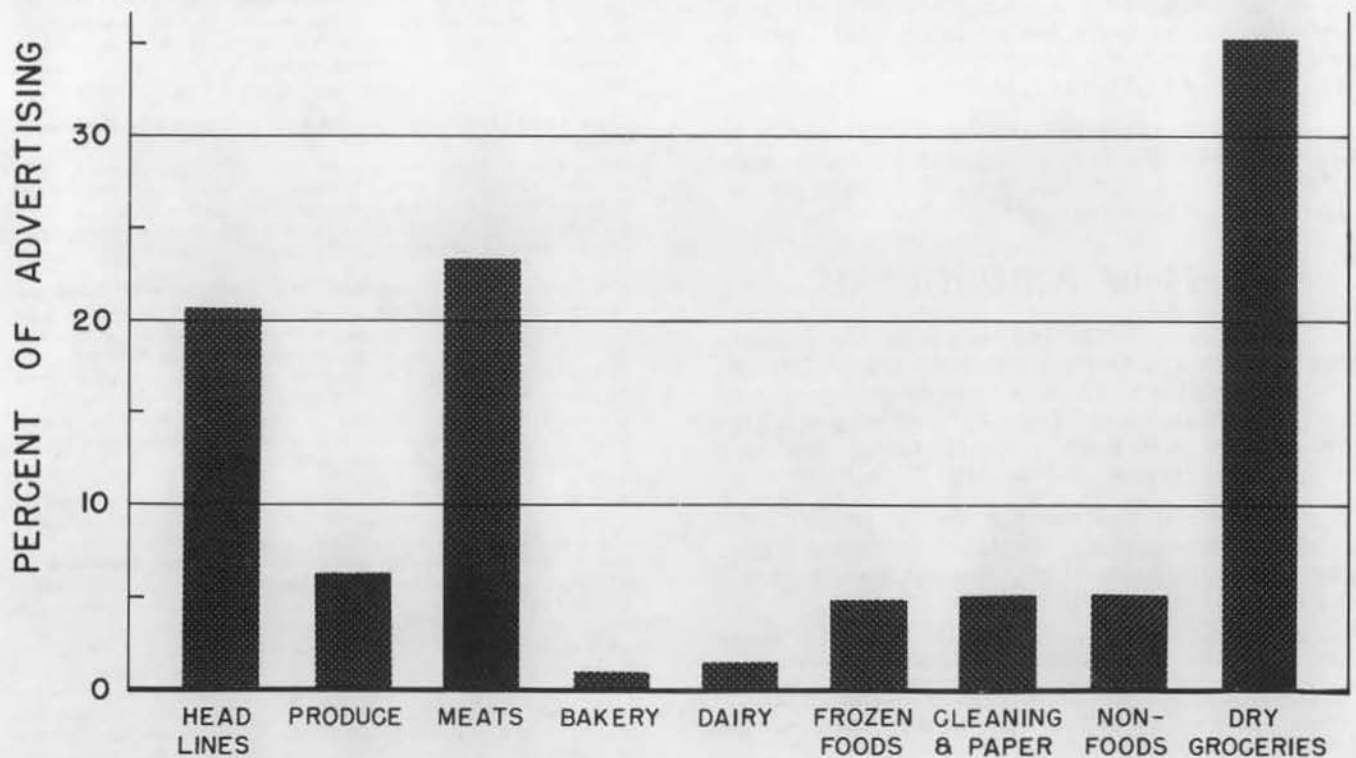


Figure 16. Average percentage\* of advertising space devoted to various departments in type "C" retail food stores, 1963-64.

\*Percentages can add to more than 100% because some frozen food is included in two categories.



**Table 14—Percent of Advertisements, 1963-64, Containing One or More Non-Food Promotional Gimmicks in Ten Market Areas by Type of Retailing Organization**

Type of Organization	Total	Salt Lake City	San Francisco-San Jose	Los Angeles	Denver	Dallas	Mpls.-St. Paul	Chicago	N.Y.	Atlanta	K. C.
A	99%	82%	40%	43%	75%	155%	134%	166%	89%	92%	95%
B	77%	34%	62%	53%	36%	197%	139%	80%	70%	150%	No ads
C	48%	50%	31%	None	52%	115%	83%	55%	21%	76%	41%
D	34%	9%	41%	None	33%	7%	40%	36%	18%	18%	34%
Total of all	62%	38%	40%	49%	55%	147%	70%	116%	52%	82%	48%

<sup>1</sup>Can be more than 100% if there is more than one type of promotion in each ad. Percentage was calculated by dividing total number of promotions by number of ads.

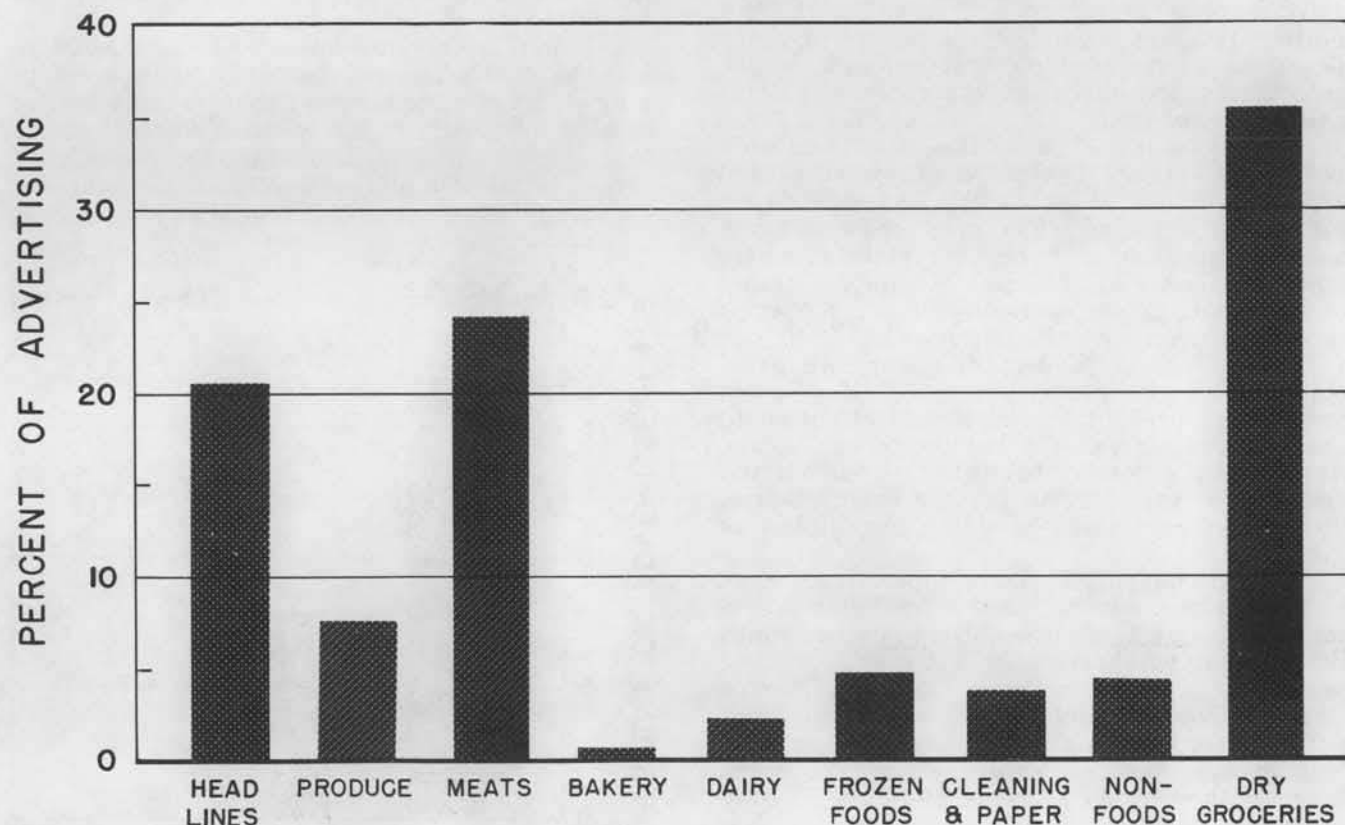
Table 14 presents the breakdown of Figure 19 by market areas. It shows the comparative percentage of ads with non-food promotional gimmicks for each type of retailing organization in each market area, as well as the percentage of total ads with promotional gimmicks for all the ads in the area. Dallas and Chicago indicate tremendous competition in promotional gimmicks as there are more promotional gimmicks than there are ads. Minneapolis-St. Paul and Atlanta show higher than average competition in this area, while Salt Lake City and San Francisco show the lowest amount.

## STAMPS IN FOOD STORE ADVERTISING

Approximately 40% of all ads mentioned that stamps were given and/or pictured the trading stamp in the ad. This is not surprising in view of the fact that an estimated 81% of chain stores and 23% of independents or 25% of all stores gave stamps in 1964.<sup>17</sup>

But the real importance of stamps is indicated by the number of special promotions of stamps

<sup>17</sup>Progressive Grocer, April, 1965, p. 38.



**Figure 17. Average percentage\* of advertising space devoted to various departments in type "D" retail food stores, 1963-64.**

\*Percentages can add to more than 100% because some frozen food is included in two categories.

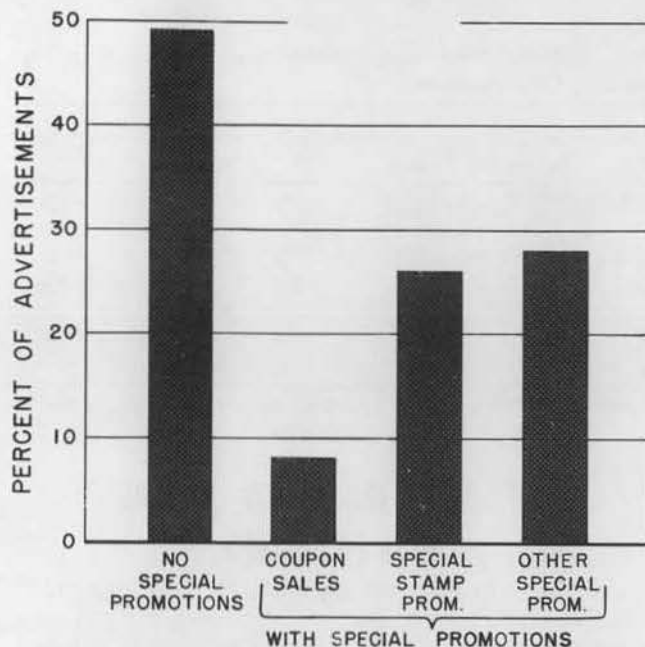


Figure 18. Percentage of advertisements containing various types of promotions, 1963-64. (Since an ad may contain more than one promotion, total percentage exceeds 100.)

that were advertised. Approximately 26% of all ads, or 65% of those that mentioned stamps, presented a special stamp promotion.<sup>18</sup> The offer of additional stamps beyond the "1 stamp for every 10c purchase" was used to promote sales by means other than price, quality or other considerations in the selling of food.

"Stamp coupons" were the most commonly used special stamp promotion. They were used in 17% of all ads (Figure 20). A stamp coupon is a coupon in the ad which must be cut out and presented at the store when a certain purchase is made in order to get extra stamps. A stamp coupon would typically read "50 extra stamps with this coupon with the purchase of a 2-lb. can of XXY coffee" or "500 extra stamps with this coupon with a \$10 or more purchase." If a coupon format were used in the ad to call attention to extra stamps offered for buying certain items, but it was not necessary to cut the coupon out and present it at the store to get the extra stamps, this was not considered as stamp coupon, but as extra stamps.

"Extra stamps" for certain purchases were the next most commonly used special stamp promotion. About 8% of all ads offered extra stamps with certain purchases. Typically this type of special stamp promotion read, "25 extra stamps when you buy 3 pounds of dry onions for 25c" or "100 extra stamps attached to every bag XYZ flour in our store on Saturday" or "25 extra stamps with every \$5 purchase Monday, Tuesday and Wednesday."

<sup>18</sup>Drawings involving stamps, such as "5 million stamps free," were not counted as stamp promotion, but as other special promotions in this study. There were a considerable number of these in addition.

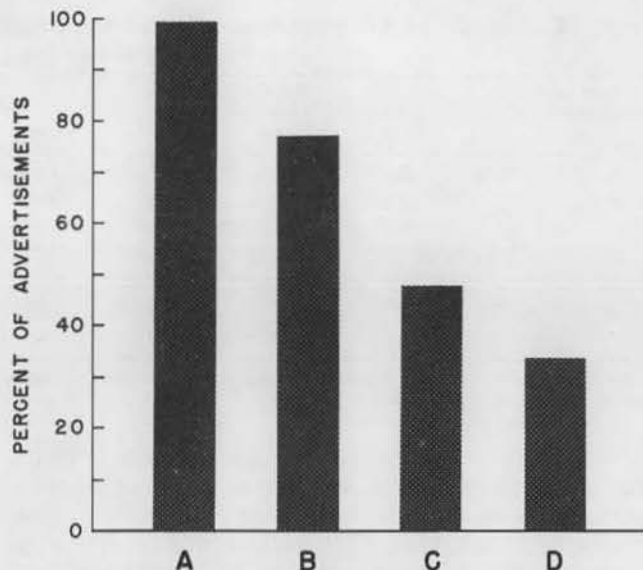


Figure 19. Percentage of advertisements containing special promotions by type of store, 1963-64. (See footnote 16.)

"Double Stamps" ("Triple" stamp offers were also included in this category) were the least popular special stamp promotion being in only about 1% of ads. The customer was offered double or triple the usual amount of stamps on all purchases on certain days.

Stamp promotion is used to bring customers into the store when they normally would be shopping on the weekend, rather than to build traffic on slow days early in the week. Figure 21 shows that Wednesday and Thursday, the days when the weekend shopping ads appear, account for 73% of all special stamp promotion ads.

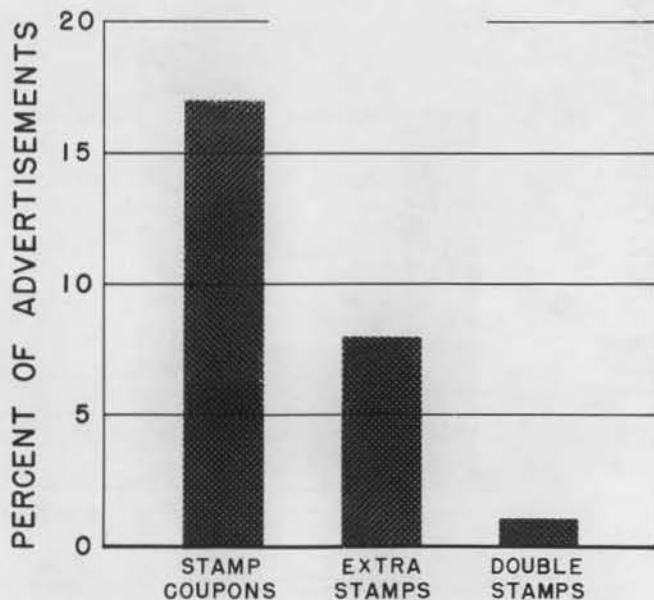


Figure 20. Percentage of advertisements containing various types of special stamp promotions, 1963-64.

There is a definite positive relationship between size of retailing organization and use of special stamp promotions (Figure 22). Fifty percent of all ads by type A organizations contained a special stamp promotion, while only 32% of ads by type B organizations, 19% of type C and 5% of type D organizations contained such a promotion. This correlation raises the old "chicken and egg" question, are these organizations big and did they become big because of dynamic merchandising, which entailed considerable investment in promotion such as stamps, or is it because they are so big they can afford this relatively expensive type of sales promotion which smaller organizations can't?

The emphasis on special stamp promotion varies considerably by market area. Dallas (Figure 23) was the most stamp-conscious in 1963-1964, with Minneapolis and Atlanta using special stamp-promotions considerably more than the remaining market areas. The percentages in Figure 23 were calculated by dividing the total number of stamp promotions by the total number of ads. Because there was more than one type of promotion in many ads, it was possible statistically for this percentage to come to more than 100% of the ads—which it did. Figure 24 shows the different types of special stamp promotions in each market area. Los Angeles raises a question concerning promotional practices. It is the only market area in which no special stamp promotions were recorded, even though the stores do give stamps and do advertise this fact in their ads. The same retailing organizations that go in heavily for special stamp promotions in other market areas do not use them in Los Angeles. It is peculiar that a merchandising practice that is so widely spread across the nation and which is so widely used by the same retailing organizations in all other marketing areas in this study, is not used

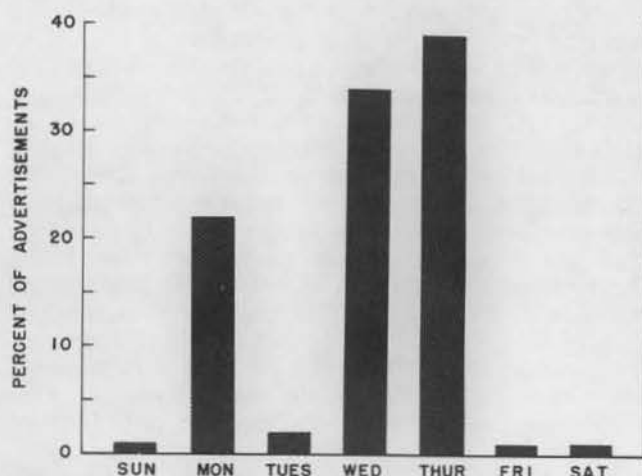


Figure 21. Days on which special stamp promotions were advertised.

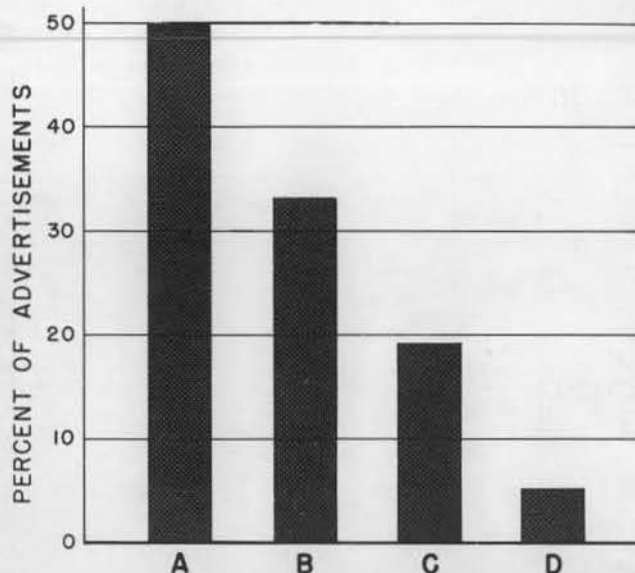


Figure 22. Percentage of total advertisements containing special stamp promotions, by type of store, 1963-64.

at all in Los Angeles. The absence of special stamp promotions raises questions. Are they not successful in Los Angeles as they are in other markets, or, is there lack of merchandising leadership in stamps in Los Angeles, or, is there an agreement not to enter the "stamp race"? A comparison of Table 4 with Figure 23 shows that there is no lack of other types of promotions in Los Angeles, only of special stamp promotions—a relatively expensive type of promotion. Another aspect of this is that all of the ads audited in Los Angeles were of Type A or Type B organizations (Appendix Table 3); if these ads had been omitted from the calculations for Figure 22, Percent of Total Advertisements with Special Stamp Promotions, the differences between A and B and C and D would be considerably greater for the markets in which stores engaged in special stamp promotions.

## NON-STAMP PROMOTIONS

Non-stamp promotions and premiums were used considerably in all market areas, but were used by type A and B retailing organizations appreciably more than by type C and D. Figure 25 shows the percentage of ads in each market area that presented non-stamp promotions and premiums. These were used more uniformly in all market areas than special stamp promotions (Figure 23) which tended to be used much more in some areas than in others.

Figure 26 shows that type A and type B organizations use non-stamp promotions and premiums more than type C and type D organizations, as is true with special stamp promotions.



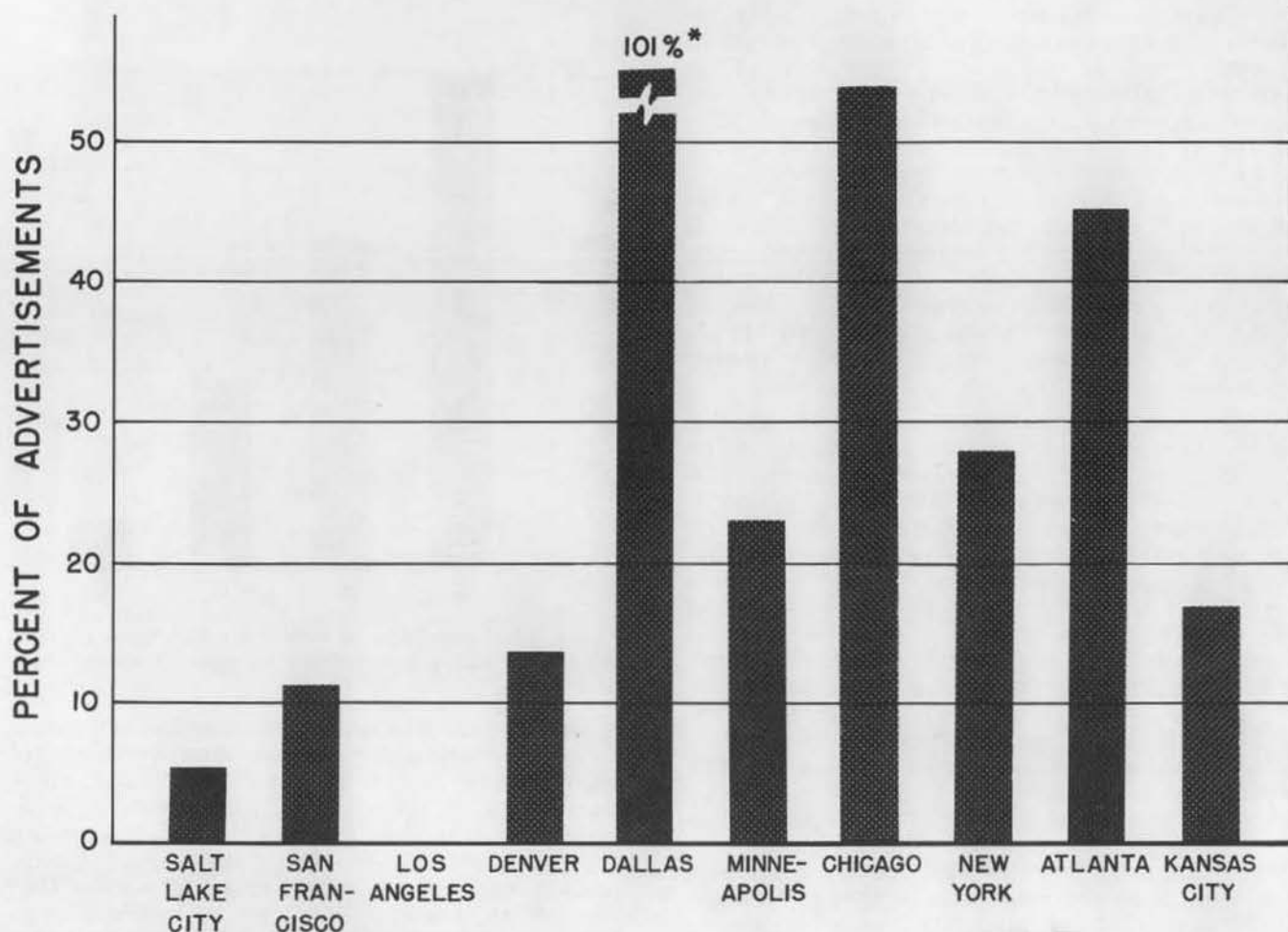


Figure 23. Percentage of advertisements containing special stamp promotions, 1963-64.

## NON-STAMP COUPONS

Non-stamp coupons show a different pattern of use than do stamp promotions and non-stamp promotions and premiums. Market areas (Figure 27) which tend to use stamp promotions most heavily do not use coupons, while those that use more coupon ads tend to use fewer special stamp ads.

The same situation seems to exist in terms of the type of retailing organization that uses coupons (Figure 28). Type D organizations, the smallest ones, use coupons the most, while they use special stamp promotions and non-stamp promotions and premiums the least.

Generally speaking, "Special Stamp Promotions" and "Non-Stamp Promotions and Premiums," the types of promotion used most by A and B organizations, are either more costly, and/or require more administrative organization. In order to run special stamp promotions the organization must give stamps, and more type A and B organizations do than do C and D. In order to

run the more popular of "Non-Stamp Promotions and Premiums," such as money games and series of books, a certain amount of administrative organization of the business is required. On the other hand non-stamp coupons, the most popular type of promotion with the smallest organizations, is a relatively easy type of promotion to engage in because it is less costly and it requires very little administrative organization. It's true that 10c or 30c "off" on a coupon item makes the merchandising of this one item much more costly than a special stamp promotion on the same item in a stamp store; however, the cost (loss) is only on this one item, not on the total volume of business that the store does. Non-stamp coupons make the total cost of promotion less for D stores. The question that arises here is whether it is cost, or lack of administrative organization in sales promotion that an organization uses. Is it because of more money available to defray the cost of promotion or more money available to pay for the administrative organization and direction of promotion that gives the larger retailing organizations the advantage in this aspect of competition in food retailing?

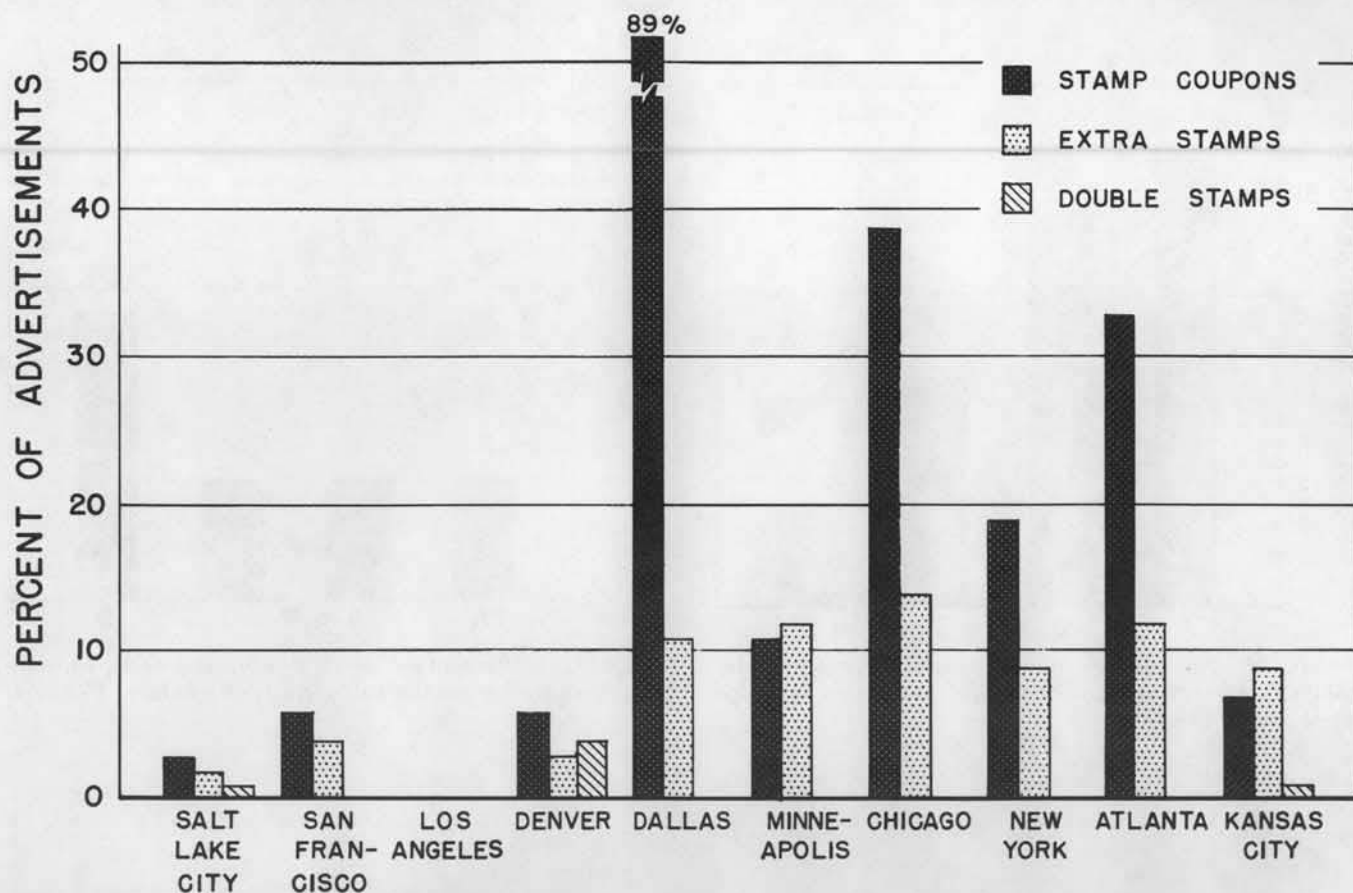


Figure 24. Percentage of advertisements containing different types of special stamp promotions, 1963-64.

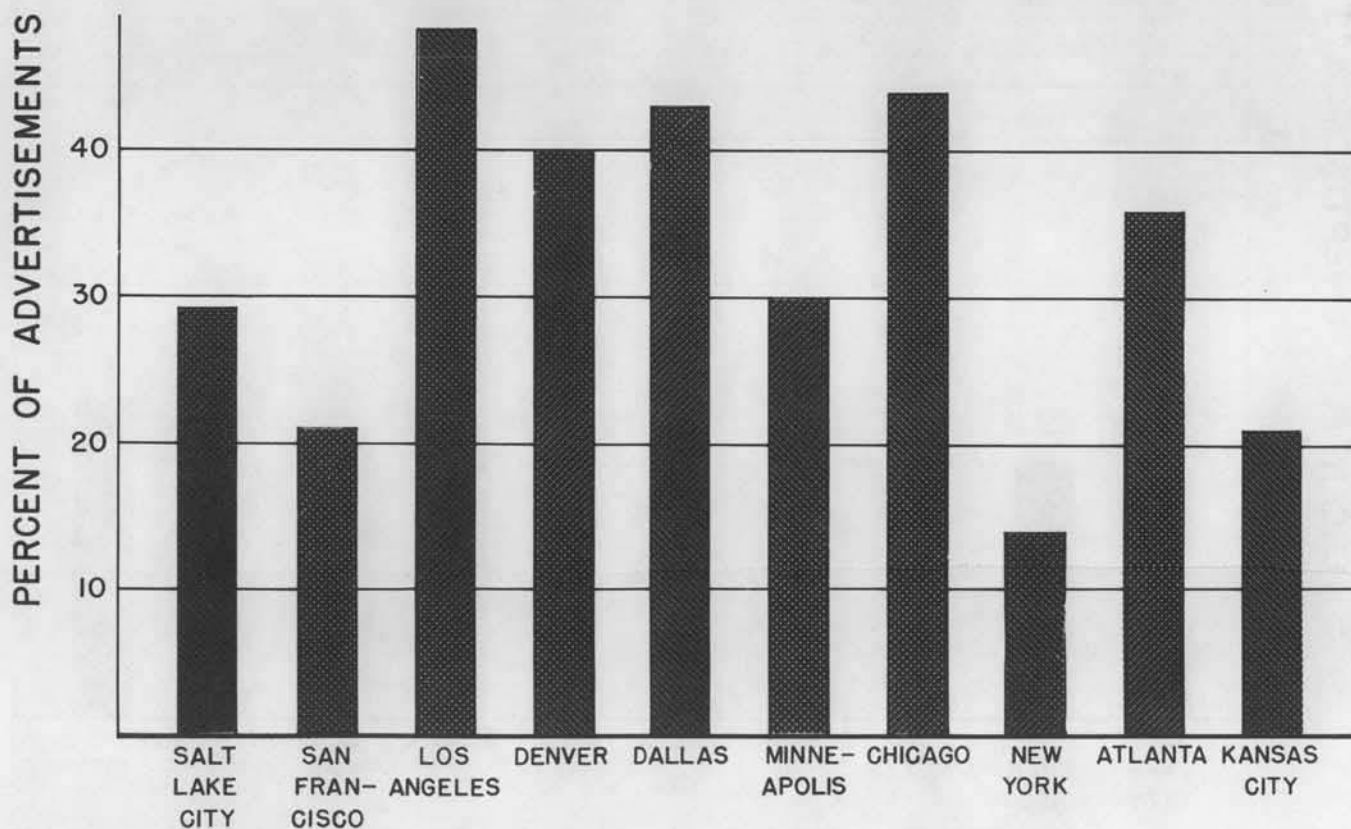


Figure 25. Percentage of advertisements containing non-stamp coupon sales, 1963-64.



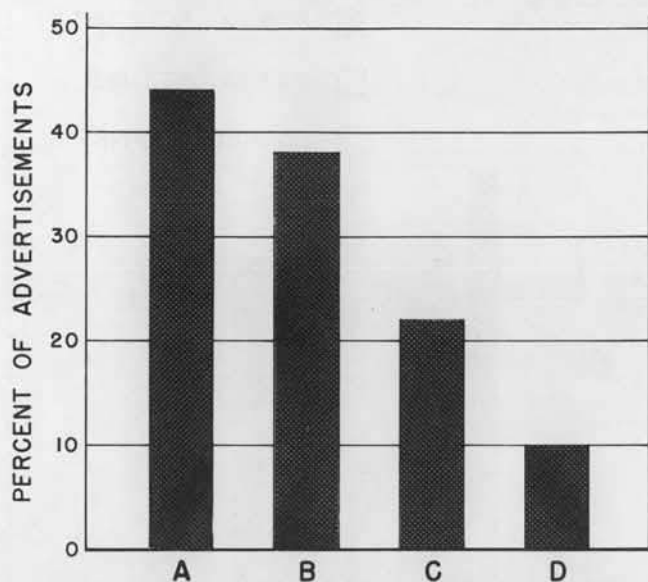


Figure 26. Percentage of total advertisements containing non-stamp promotions and premiums, by type of store, 1963-64.

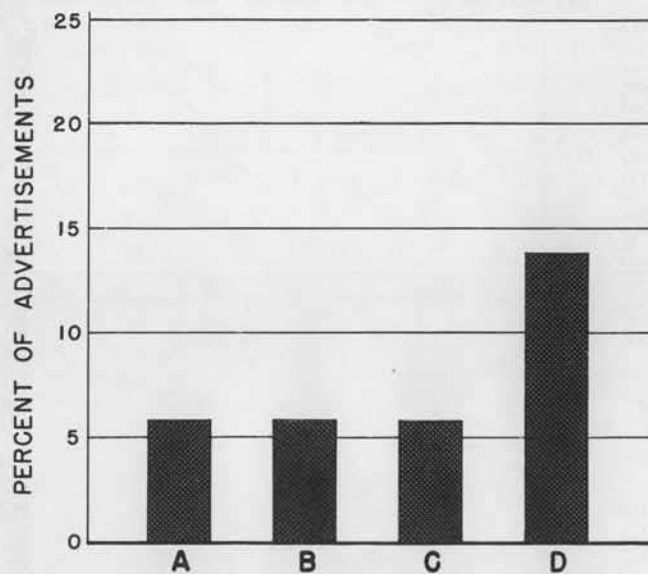


Figure 28. Percentage of total advertisements containing non-stamp coupon sales, by type of store, 1963-64.

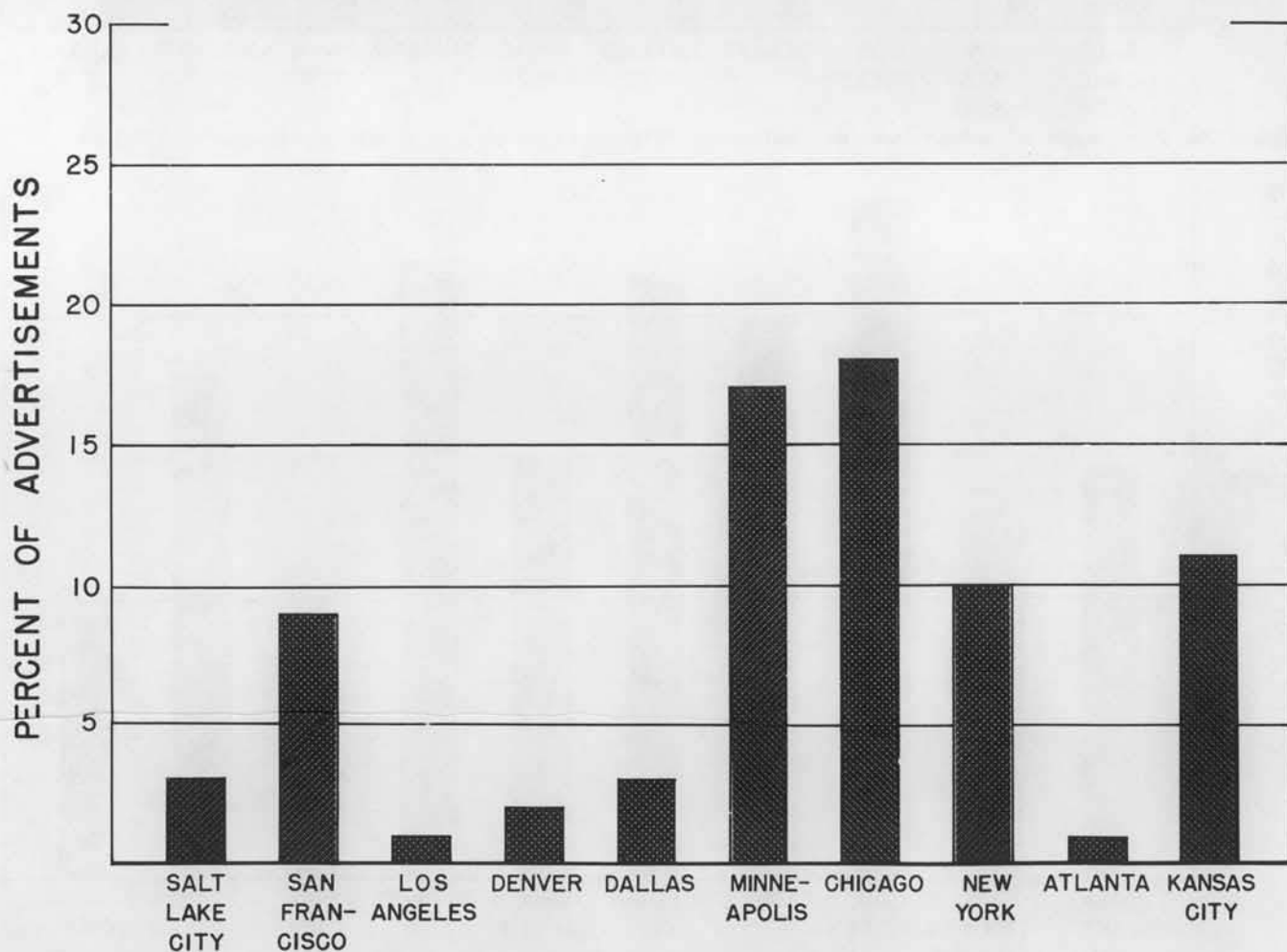


Figure 27. Percentage of advertisements containing non-stamp coupon sales, 1963-64.

## APPENDIX

Table 1—Retailing organizations, Percentage of dollar volume of business done, Number of stores, Percentage of dollar volume done per store and Ranking of each one of these factors in the Salt Lake City Metropolitan Area.

A Retailing organization	B % of area dollar volume per retail organization	C Number of stores per retail organization	D Average % of markets per store (B÷C)	E Rank by % of area (B)	F Rank by number of stores (C)	G Rank by average % store (D)	H Accumulated Rank (E + F + G)	I Retailing organization by accumulated rank	Rank by size of Total Retail Operation for Stores in Study <sup>1</sup>
Safeway	22.0	23	.956	1	2	4	7	Safeway	A
A-G Stores (co-op)								Albertson's	B
+Foodtown	20.0	43	.606	2	1	6	9	A-G Stores (co-op)	C
Albertson's	19.5	16	1.219	3	4	1	8	+Foodtown	C
Mayfair								Mayfair	B
+Grand American								+Grand Union	B
+Valley Shopping	16.6	16	1.037	4	4	2	10	+Valley Shopping	C
IGA (vol.)								Dan's	
+Buy Rite	7.0	22	.318	5	3	8	16	IGA (vol.)	C
Dan's	3.1	3	1.033	6	6	3	15	+Buy Rite	
Foodtown	.9	2	.450	7	7	7	21	Foodtown Inc.	D
Totals	89.1	125							

Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, New York.

<sup>1</sup>Size of organization in all markets. "A", over \$1 billion in sales; "B", \$40 million to \$1 billion in sales; "C", \$10 million to \$40 million in sales, plus all voluntary and cooperative groups; "D", under \$10 million in sales.

# APPENDIX

Table 2—Retailing organizations, Percentage of dollar volume of business done, Number of stores, Percentage of dollar volume done per store and Ranking of each of these factors in the San Francisco and San Jose Metropolitan Area.

A Retailing organization	B % of area dollar volume per retail organization	C Number of stores per retail organization	D Average % of markets per store (B÷C)	E Rank by % of area (B)	F Rank by number of stores (C)	G Rank by average % store (D)	H Accumulated Rank (E + F + G)	I Retailing organization by accumulated rank	J Rank by size of Total Retail Operation for Stores in Study <sup>1</sup>
*United Grocers (co-op)	18.0	1600	.011	1	1	35	37	Lucky Stores	B
Safeway Stores	17.3	139	.124	2	4	15	21	Safeway Stores	A
Allied Food Stores (co-op)	7.5	452	.017	3	2	34	39	Purity Stores	B
Lucky Stores	7.1	50	.142	4	5	11	20	Mayfair Markets	B
*S. F. G. Stores (vol.)	5.7	280	.032	5	3	32	40	Consumer (co-op)	
Purity Foods	4.2	40	.105	6	6	18	30	P & X Markets	C
P & X Mkts.	4.1	40	.103	7	6	19	32	Quality Foods	
Mayfair Mkts.	3.3	26	.127	8	11	12	31	United Grocers (co-op)	
*Louis Stores	3.2	40	.080	9	6	24	39	Lee Bros. (co-op)	B
Lee Bros. (co-op)	2.7	22	.123	10	12	16	38	U Save Centers	
Littleman Stores (Cala)	2.5	22	.114	11	12	17	40	Louis Stores	
*Consumer Co-op	2.2	11	.200	12	14	5	31	Allied Food Stores (co-op)	
*Quality Foods	2.0	7	.285	13	18	3	34	S. F. G. Stores (vol.)	
*U Save Centers	1.2	4	.300	14	22	2	38	Littleman Stores (Cala)	C
Fry's Food Stores	1.2	7	.171	15	18	8	41	Fry's Food Stores	C
*Russell's Mkts.	1.0	10	.100	16	15	20	51	Giant Regal Food King	
**Red & White Stores (vol.)	1.0	34	.029	17	9	33	59	Russell's Mkts.	
*Giant Regal Food King	.9	6	.150	18	20	10	48	PW Supermarkets	C
Hob Nob	.7	9	.078	19	16	25	60	Park & Shop Markets	
**Dick's Sprmks.	.7	8	.088	20	17	23	60	United Markets (Saccone Bros.)	
**PW Sprmkt.	.7	3	.233	21	27	4	52	Red & White Stores (vol.)	
*Park & Shop Mkts.	.5	3	.167	22	27	9	58	Crown Sprmks.	C
*United Markets (Saccone Bros.)	.5	4	.125	23	22	13	58	Hob Nob	
**Crown Sprmks.	.5	4	.125	24	22	13	59	Dick's Sprmks.	
**Raos	.5	1	.500	25	36	1	62	Raos	D
*All American Mkts.	.4	6	.067	26	20	28	74	Lynch Foods (co-op)	
*Lynch Foods (co-op)	.4	2	.200	27	32	5	64	Giant Super	C
**Giant Super	.4	2	.200	28	32	5	65	All American Mkts.	
*Brentwood Mkts.	.3	4	.075	29	22	26	77	Speedee Marts	D
*Key Sprmks.	.3	4	.075	30	22	26	78	Brentwood Mkts.	
*Speedee Marts	.3	34	.009	31	9	36	76	Key Sprmks.	
*Embee Grocery	.2	2	.100	32	32	20	84	Embee Grocery	
*Jolly Mkts.	.2	2	.100	33	32	20	85	Jolly Markets	
*Morris & O'Brien (Super X)	.2	3	.067	34	27	28	89	Morris & O'Brien (Super X)	
*Piedmont Grocers	.2	3	.067	35	27	28	90	Piedmont Grocers	
*Semrau & Sons (Payless)	.2	3	.067	36	27	28	91	Semrau & Sons (Payless)	D

Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, New York.

\*Operate stores in San Francisco-Oakland only

\*\*Operate stores in San Jose only

<sup>1</sup>Size of organization in all markets. "A", over \$1 billion in sales; "B", \$40 million to \$1 billion in sales; "C", \$10 million to \$40 million in sales, plus all voluntary and cooperative groups; "D", under \$10 million in sales.

# APPENDIX

Table 3—Retailing organizations, Percentage of dollar volume of business done, Number of stores, Percentage of dollar volume done per store and Ranking of each one of these factors in the Los Angeles Metropolitan Area.

A Retailing organizations	B % of area dollar volume per retail organization	C Number of stores per retail organization	D Average % of market per store (B÷C)	E Rank by % of area (B)	F Rank by number of stores (C)	G Rank by average % store (D)	H Accumulated Rank (E + F + G)	I Retailing organizations by accumulated rank	Rank by Size of total Retail Operation for Stores in Study <sup>1</sup>
Certified Grocers (co-op)									
Spartan Stores	22.0	2160	.010	1	1	40	42	Von's	B
Safeway	8.3	148	.056	2	3	31	36	Ralph's Grocery	B
Von's	8.0	79	.101	3	5	6	14	Food Giant Mkts. (co-op)	B
Orange Empire	7.0	750	.009	4	2	41	47	Market Basket (Kroger)	A
Ralph's Grocery	6.0	46	.130	5	9	2	16	Alpha Beta Acme	A
Alpha Beta Acme	5.4	80	.067	6	4	20	30	Thriftmart	B
Market Basket (Kroger)	4.6	53	.087	7	7	14	28	The Boy's Markets (co-op)	B
Thriftmart	4.4	57	.077	8	6	17	31	Hughes Markets (co-op)	
Food Giant Mkts. (co-op)	4.2	48	.105	9	8	5	22	Mayfair Mkts.	B
Mayfair Mkts.	2.6	29	.090	10	11	13	34	Safeway	A
The Boy's Markets (co-op)	2.2	22	.100	11	13	7	31	Shoppers Mkts. (co-op)	
Hughes Markets (co-op)	1.8	15	.120	12	16	3	31	Certified Grocers (co-op)	
Lucky Stores	1.7	26	.065	13	12	24	49	Supreme F-G Ranch	
Shoppers Mkts. (co-op)	1.6	14	.115	14	18	4	36	Orange Empire Lucky Stores	B
Foodfair	1.4	22	.064	15	13	26	54	Better Food Mkts.	
Supreme F-G Ranch	1.2	9	.133	16	25	1	42	Foodfair	
A & P	1.0	19	.053	17	15	32	64	Alexander's Mkts. (vol.)	
Alexander's Mkts. (vol.)	1.0	12	.083	18	23	15	56	Greater All American Mkts. (Albertson's)	
Better Food Mkts.	1.0	10	.100	19	24	7	50	McCoy's Markets	
Greater All American Mkts. (Albertson's)	1.0	14	.071	20	18	18	56	A & P	A
McCoy's Markets	1.0	15	.067	21	16	21	58	Dales Food Markets	
Dales Food Markets	.9	14	.064	22	18	25	65	Coles Markets	
Pantry Food Mkts. (co-op)	.8	13	.061	23	21	30	74	Crawford Stores (co-op)	
Coles Markets	.7	9	.078	24	25	16	65	Pantry Food Markets (co-op)	
Crawford Stores (co-op)	.5	5	.100	25	34	7	66	Westward Ho	
Foods Co.	.5	8	.062	26	28	27	81	El Rancho	
Michael's Markets	.5	8	.062	27	28	27	82	Shop-Rite Mkts. (co-op)	
Piggly Wiggly Calif. (co-op)	.5	8	.062	28	28	27	83	Foods Company	
Shop-Rite Mkts. (co-op)	.5	7	.071	29	32	19	80	Michael's Markets	
Gateway Markets	.4	9	.044	30	25	37	92	Piggly Wiggly Calif. (co-op)	
Stater Bros.	.4	8	.050	31	28	33	92	Daylight Sprmks. (co-op)	
Westward Ho (co-op)	.4	4	.100	32	36	7	75	Gateway Markets	
El Rancho	.3	3	.100	33	38	7	78	Stater Bros.	
Jurgensen's	.3	13	.023	34	21	39	94	Jurgensen's	
Sav Mor	.3	6	.050	35	33	33	101	Speedee Marts	
Community Markets	.2	5	.040	36	34	38	108	Esko	
Daylight Sprmks. (co-op)	.2	2	.100	37	41	7	85	Jim's	
Esko	.2	3	.067	38	38	21	97	Sav Mor	
Jim's	.2	3	.067	39	38	21	98	Community Markets	
Lee R. Bishop Co. (co-op)	.2	4	.050	40	36	33	109	Lee R. Bishop Co. (co-op)	
Shopping Basket (co-op)	.1	2	.050	41	41	33	115	Shopping Basket (co-op)	
Speedee Marts	.1	31	.003	42	10	42	94		

Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, New York.

<sup>1</sup>Size of organization in all markets. "A", over \$1 billion in sales; "B", \$40 million to \$1 billion in sales; "C", \$10 million to \$40 million in sales, plus all voluntary and cooperative groups; "D", under \$10 million in sales.

# APPENDIX

Table 4—Retailing organizations, Percentage of dollar volume of business done, Number of stores, Percentage of dollar volume done per store and Ranking of each one of these factors in the Denver Metropolitan Area.

A Retailing organization	B % of area dollar volume per retail organization	C Number of stores per retail organization	D Average % of markets per store (B÷C)	E Rank by % of area (B)	F Rank by number of stores (C)	G Rank by average % store (D)	H Accumulated Rank (E + F + G)	I Retailing organization by accumulated rank	J Rank by Size of Total Retail Operation for Stores in Study <sup>1</sup>
Safeway	34.0	56	.607	1	2	3	6	Safeway	A
Miller's Sprmks. (National Tea)	15.0	31	.484	2	4	5	11	Miller's Sprmks. (national Tea)	A
King Soopers (J. S. Dillon)	11.0	14	.785	3	7	1	11	King Soopers (J. S. Dillon)	B
A-G Stores (co-op) + Thriftway Food Markets	12.0	182	.066	4	1	9	14	Red Owl	B
Red Owl	10.0	15	.667	5	6	2	13	A-G Stores (co-op) + Thriftway Food Mkts.	C
Furr's	4.0	8	.500	6	9	4	19	Furr's	C
Seven Eleven	2.0	35	.057	7	3	10	20	Seven Eleven	
Ideal Markets (co-op)	1.0	3	.333	8	10	6	24	Ideal Markets (co-op)	
U Tote 'Em	0.9	16	.056	9	5	11	25	U Tote 'Em	
Big Top	0.7	13	.054	10	8	12	30	Buddy & Lloyd's (co-op)	D
Buddy & Lloyds (co-op)	.7	3	.233	11	10	7	28	Super Saver Markets	
Super Saver Markets	0.7	3	.233	12	10	7	29	Big Top	
TOTALS	92.0	379							

Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, New York.

<sup>1</sup>Size of organization in all markets. "A", over \$1 billion in sales; "B", \$40 million to \$1 billion in sales; "C", \$10 million to 40 million in sales, plus all voluntary and cooperative groups; "D", under \$10 million in sales.

Table 5—Retailing organizations, Percentage of dollar volume of business done, Number of stores, Percentage of dollar volume done per store and Ranking of each one of these factors in the Dallas Metropolitan Area.

A Retailing Organizations	B % of area dollar volume per retail organization	C Number of stores per retail organization	D Average % of market per store (B÷C)	E Rank by % of area (B)	F Rank by number of stores (C)	G Rank by average % stores (D)	H Accumulated Rank (E + F + G)	I Retailing organizations by accumulated rank	J Rank by Size of Total Retail Operation for Stores in Study <sup>1</sup>
A & P	17.0	44	.386	1	4	4	9	A & P	A
Safeway	17.0	39	.436	2	5	3	10	Safeway	A
Affiliated Food Stores (co-op)								Wyatt Food Stores (Kroger)	A
Thriftway Stores (includes: L&S, H&H, Food Basket)	16.5	281	.059	3	1	11	15	Affiliated Food Stores (co-op)	
Wyatt Food Stores (Kroger)	13.0	29	.448	4	6	2	12	Thriftway Stores (includes: L & S, H & H, Food Basket)	
Tom Thumb Sprmks.	11.0	29	.379	5	7	5	17	Tom Thumb Sprmks.	B
Minyard's Stores (co-op)	5.0	14	.357	6	10	6	22	White's	
Worth Food Mart	4.0	16	.250	7	9	9	25	Minyard's Stores (co-op)	C
White's	2.8	6	.467	8	11	1	20	Worth Food Mart	B
7-Eleven Stores & Cabells	2.6	135	.019	9	2	15	26	7-Eleven Stores & Cabells	
Big "D" Federated (vol.)	2.5	105	.024	10	3	14	27	Big "D" Federated (vol.)	
Hodges Sprmks. (co-op)	1.9	6	.316	11	12	7	30	Hodges Sprmks. (co-op)	
Buddie's	1.0	4	.250	12	13	10	35	Super Save (vol.)	
Super Save (vol.)	1.0	20	.050	13	8	12	33	Buddie's	B
Cliff Food Stores (co-op)	.8	3	.267	14	15	8	37	Cliff Food Stores (co-op)	
Piggly Wiggly	.2	4	.050	15	14	13	41	Piggly Wiggly	
TOTALS	96.3	735							

Sources: Metro Market Studies, Inc., 1965, Dobbs Ferry, New York.

<sup>1</sup>Size of organization in all markets. "A", over \$1 billion in sales; "B", \$40 million to \$1 billion in sales; "C", \$10 million to \$40 million in sales, plus all voluntary and cooperative groups; "D", under \$10 million in sales.



# APPENDIX

Table 6—Retailing organizations, Percentage of dollar volume of business done, Number of stores, Percentage of dollar volume done per store and Ranking of each one of these factors in the Minneapolis Metropolitan Area.

A Retailing organization	B % of area dollar volume per retail organization	C Number of stores per retail organization	D Average % of markets per store (B÷C)	E Rank by % of area (B)	F Rank by: number of stores (C)	G Rank by average % store (D)	H Accumulated Rank (E + F + G)	I Retailing organization by accumulated rank	Rank by Size of Total Retail Operation for Stores in Study <sup>1</sup>
Red Owl	21.0	36	.583	1	4	2	7	Red Owl	B
Super Valu	13.0	29	.448	2	5	5	12	Super Valu	C
National Tea (including Del Farm)	11.0	42	.262	3	3	11	17	National Tea (including Del Farm)	A
Applebaum's	7.0	20	.350	4	6	9	19	Applebaum's	
Country Club Mkts.	6.0	15	.400	5	8	6	19	Country Club Mkts.	
Penny's Sprmks.	5.0	9	.555	6	10	3	19	Penny's Sprmks.	D
Fairway (co-op) + Super Fair	4.8	103	.047	7	1	17	25	Foodtown Sprmks.	D
Foodtown Sprmks.	3.6	8	.450	8	11	4	23	Fairway (co-op) + Super Fair	D
IGA (vol.) + Big Ten Stores + Mayfair	2.0	66	.030	9	2	18	29	Shoppers City	
Shoppers City	2.0	3	.666	10	14	1	25	IGA (vol.) + Big Ten Stores + Mayfair	D
Kroger	1.4	9	.155	11	9	15	35	Jensen's Super Valu	
Jensen's Super Valu	1.1	3	.367	12	14	8	34	Kroger	A
Red & White (vol.) + Lucky Dollar	0.9	19	.047	13	7	16	36	Red & White (vol.) + Lucky Dollar	
Jerry's	0.8	4	.020	14	12	12	38	Jerry's	D
Knowlan's Sprmks.	0.8	3	.027	15	14	10	39	Knowlan's Sprmks.	
Rooney's	0.8	2	.040	16	17	6	39	Rooney's	
Theisen's	0.7	4	.175	17	12	14	43	Theisen's	D
Glewwe's Mkts.	0.4	2	.200	18	17	12	47	Glewwe's Mkts.	
TOTALS	82.3	377							

Sources: Metro Market Studies, Inc., 1965, Dobbs Ferry, New York.

<sup>1</sup>Size of organization in all markets. "A", over \$1 billion in sales; "B", \$40 million to \$1 billion in sales; "C", \$10 million to \$40 million in sales, plus all voluntary and cooperative groups; "D", under \$10 million in sales.

# APPENDIX

Table 7—Retailing organizations, Percentage of dollar volume of business done, Number of stores, Percentage of dollar volume done per store and Ranking of each one of these factors in the Chicago Metropolitan Area.

A Retailing organizations	B % of area dollar volume per retail organization	C Number of stores per retail organization	D Average % of market per store (B÷C)	E Rank by % of area (B)	F Rank by number of stores (C)	G Rank by average % store (D)	H Accumulated Rank (E + F + G)	I Retailing organization by accumulated rank	Rank by Size of Total Retail Operation for Stores in Study <sup>1</sup>
Jewel Tea Co.	22.0	237	.093	1	7	3	11	Jewel Tea Co.	B
Del Farm (Nat'l Tea)	17.8	234	.076	2	8	6	16	Del Farm (Nat'l Tea)	A
A & P	12.5	181	.069	3	10	8	21	Certified Grocers (co-op)	
Certified Grocers	8.5	500	.017	4	1	14	19	A & P	A
High Low Foods	4.8	57	.084	5	19	4	28	High Low Foods	C
Kroger	4.5	59	.076	6	18	5	29	Kroger	A
Central Food Stores (co-op)	3.5	340	.010	7	5	17	29	Central Food Stores (co-op)	
Grocerland (co-op)	3.4	375	.009	8	4	18	30	Grocerland (co-op)	
Spot Lite Food (vol.)	3.0	500	.006	9	1	21	31	Spot Lite Food (vol.)	
Cardinal Food Stores (vol.)									
Royal Blue Stores	2.5	475	.005	10	3	23	36	Hillman's	C
Hillman's	2.2	15	.147	11	21	2	34	Cardinal Food Stores (vol.)	
Dominick's	1.9	10	.190	12	23	1	36	Royal Blue Stores	
Banner Food Stores (vol.)	1.7	150	.011	13	11	15	39	Dominick's	A
Progressive Food Stores								Banner Food Stores (vol.)	D
Pretty Penny (co-op)	1.7	150	.011	14	11	15	40	Progressive Food Stores	
Piggly Wiggly Eagle	1.6	22	.073	15	20	7	42	Pretty Penny (co-op)	
Savory Food Stores (vol.) Richmor	1.6	300	.005	16	6	22	44	Piggly Wiggly Eagle	
United Food Stores (vol.)	1.5	200	.007	17	9	20	46	Savory Food Stores (vol.) Richmor	D
IGA (vol.)	.7	90	.008	18	15	19	52	United Food Stores (vol.)	
Thriftway Foods (vol.)	.7	150	.005	19	11	24	54	IGA (vol.)	
Associated Grocers (vol.)	.5	100	.005	20	14	24	58	Thriftway Foods (vol.)	D
Pick'n Save Foods	.4	12	.033	21	22	12	55	Pick'n Save Foods	D
STATE Food Stores (vol.)	.4	85	.005	22	16	24	62	Associated Grocers (vol.)	
Clover Farm Stores (vol.)	.3	70	.004	23	17	29	69	Janson's Fine Foods	
Janson's Fine Foods	.3	6	.050	24	25	9	58	D & S	
D & S	.2	4	.050	25	26	9	60	STATE Food Stores (vol.)	
M. Muskal Grocery	.2	10	.020	26	23	13	62	M. Muskal Grocery	
Vito's Markets	.2	4	.005	27	26	9	62	Vito's Markets	
								Clover Farm Stores	
TOTALS	98.6	4,336							

Sources: Metro Market Studies, Inc., 1965, Dobbs Ferry, New York.

<sup>1</sup>Size of organization in all markets. "A", over \$1 billion in sales; "B", \$40 million to \$1 billion in sales; "C", \$10 million to \$40 million in sales, plus all voluntary and cooperative groups; "D", under \$10 million in sales.

# APPENDIX

Table 8—Retailing organizations, Percentage of dollar volume of business done, Number of stores, Percentage of dollar volume done per store and Ranking of each one of these factors in the New York Metropolitan Area.

A	B	C	D	E	F	G	H	I	
Retailing organizations	% of area dollar volume per retail organization	Number of stores per retail organization	Average % of markets per store (B · C)	Rank by % of area (B)	Rank by number of stores (C)	Rank by average % store (D)	Accumulated Rank (E + F + G)	Retailing organization by accumulated rank	Rank By Size of Total Retail Operation for Stores in Study <sup>1</sup>
A & P	16.1	460	.035	1	2	12	15	A & P	A
H. C. Bohack		230	.023	2	5	22	29	First National	B
Hill's & Korvette's	4.7	44	.107	3	18	2	23	Hill's & Korvette's	B
								Grand Union	
First National	4.6	123	.037	4	9	8	21	Grand Union (sub. div.)	B
Grand Union								Met Foods (vol.)	
(sub. div.)	4.6	107	.043	5	12	7	24	Independents	
Associated Food Stores (co-op)	3.6	240	.015	6	4	29	39	H. C. Bohack	B
Met Foods (vol.)	3.5	80	.044	7	15	6	28	Waldbaum	B
Daitch Shopwell	3.1	96	.032	8	14	15	37	Foodfair	A
Key Food Stores (co-op)	3.0	175	.017	9	7	24	40	Daitch Shopwell	B
								Associated Food Stores	
Waldbaum	2.9	60	.048	10	16	4	30	(co-op)	C
United Food Stores (vol.)	2.5	700	.003	11	1	35	47	Key Food Stores (co-op)	
Food Fair	2.4	51	.047	12	17	5	34	King Kullen	B
King Kullen	1.6	44	.036	13	18	10	42	United Food Stores (vol.)	
Pioneer Food Stores (co-op)	1.6	115	.014	14	11	31	56	Smilen-Big Apple	C
Gristede Bros.	1.5	100	.015	15	13	29	57	Dan's Supreme Mkts.	
Sunbeam-IGA (vol.)	1.5	120	.012	16	10	32	58	Packer's Sprmks.	
Smilen-Big Apple	1.3	35	.037	17	21	9	47	Pioneer Food Strs. (co-op)	
Packer's Sprmks.	1.1	32	.034	18	22	13	53	Gristede Bros.	
Dan's Supreme Mkts.	.9	18	.050	19	25	3	47	Sunbeam-IGA (vol.)	D
Supermarkets Oper. Company (Shoprite)	.7	6	.117	20	37	1	58	Supermarkets Oper. Co.	
								(Shoprite)	B
Mother's Best (vol.)	.5	150	.003	21	8	36	65	Acme	A
Acme	.4	11	.036	22	29	10	61	Mother's Best (vol.)	
Bernice Foods (vol.)	.4	200	.002	23	6	37	66	Bernice Foods (vol.)	
Dilbert's	.4	24	.017	24	24	25	73	Mandell	
Mandell	.4	14	.028	25	26	18	69	Sloan's Supermarkets	
Royal Farms	.4	25	.016	26	23	27	76	Magnet Stores (vol.)	
Sloan's Sprmks.	.4	14	.028	27	26	18	71	Dilbert's	B
D'Agostino Bros.	.3	9	.033	28	32	14	74	D'Agostino Bros.	
Fedco Corp.	.3	10	.030	29	30	16	75	Fedco Corp.	
Magnet Stores (vol.)	.3	250	.001	30	3	38	71	Royal Farms	
Spinner's Markets	.3	10	.030	31	30	16	77	Spinner's Markets	
Blue Jay Mkts. (co-op)	.2	7	.028	32	35	18	85	Blue Jay Mkts. (co-op)	
Cracker Barrel, Inc.	.2	7	.028	33	35	18	86	Cracker Barrel, Inc.	
Elnor & Pike	.2	9	.022	34	32	23	89	Elnor & Pike	C
Bernstein Bros.	.2	13	.015	35	28	28	91	Peter Reeves Mkts.	
Peter Reeves Mkts.	.2	41	.005	36	20	34	90	Bernstein Bros.	
Pick Quick Mkts.	.1	9	.011	37	32	33	102	Scaturro's	
Scaturro's	.1	6	.017	38	37	25	100	Pick Quick Mkts.	

Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, New York.

<sup>1</sup>/Size of organization in all markets. "A", over \$1 billion in sales; "B", \$40 million to \$1 billion in sales; "C", \$10 million to \$40 million in sales, plus all voluntary and cooperative groups; "D", under \$10 million in sales.

## APPENDIX

**Table 9—Retailing organizations, Percentage of dollar volume of business done, Number of stores, Percentage of dollar volume done per store and Ranking of each one of these factors in the Atlanta Metropolitan Area.**

A Retailing organizations	B % of area dollar volume per retail organization	C Number of stores per retail organization	D Average % of market per store (B÷C)	E Rank by % of area (B)	F Rank by number of stores (C)	G Rank by average % stores (D)	H Accumulated Rank (E + F + G)	I Retailing organizations by accumulated rank	Rank by Size of Total Retail Operation for Stores in Study <sup>1</sup>
Colonial Stores	23.0	52	.442	1	2	4	7	A & P	A
A & P	20.0	43	.465	2	3	2	6	Colonial Stores	B
Big Apple	18.0	39	.461	3	4	3	10	Big Apple	B
Kroger	12.5	23	.543	4	6	1	11	Kroger	A
Foodtown (co-op)								Foodtown (co-op)	C
Red Dot								Red Dot	C
Handy Pantry								Handy Pantry	
A-G	9.0	119	.076	5	1	11	17	A-G	C
Winn Dixie	4.5	12	.375	6	9	7	22	Winn Dixie	B
IGA (vol.), Simpson's IGA								IGA (vol.) Simpson's IGA	
Tuxedo IGA	4.0	14	.286	7	8	8	23	Tuxedo IGA	D
E-Z Food Stores	1.6	30	.053	8	5	13	26	Buehler Sprmks.	D
Buehler Sprmks.	1.2	3	.040	9	11	5	25	E-Z Food Stores	
Echol's Ma-Jik Mkts.	1.0	22	.045	10	7	14	31	Echol's Ma-Jik Mkts.	
Harris Sprmks.	.7	3	.233	11	12	9	32	Harris Sprmks.	
Pot 'O' Gold Dairy Stores	.5	7	.071	12	10	12	34	Blair Sprmks. (co-op)	
Blair Sprmks. (co-op)	.4	1	.400	13	14	6	33	Pot 'O' Gold Dairy Stores	
Crook's Foodtown (co-op)	.4	2	.200	14	13	10	37	Crook's Foodtown (co-op)	
<b>TOTALS</b>	<b>96.8</b>	<b>370</b>							

Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, New York.

<sup>1</sup>Size of organization in all markets. "A", over \$1 billion in sales; "B", \$40 million to \$1 billion in sales; "C", \$10 million to \$40 million in sales, plus all voluntary and cooperative groups; "D", under \$10 million in sales.

**Table 10—Retailing organizations, Percentage of dollar volume of business done, Number of stores, Percentage of dollar volume done per store and Ranking of each one of these factors in the Kansas City Metropolitan Area.**

A Retailing organizations	B % of area dollar volume per retail organization	C Number of stores per retail organization	D Average % of market per store (B÷C)	E Rank by % of area (B)	F Rank by number of stores (C)	G Rank by average % store (D)	H Accumulated Rank (E + F + G)	I Retailing organization by accumulated rank	Rank by Size of Total Retail Operation for Stores in Study <sup>1</sup>
Muel Bach (co-op), Justrite Stores								Safeway	A
Mr. A. G. Stores, Thriftway Food								Muelbach (co-op)	D
Stores, Wolferman,								A & P	A
Monteil's Sprmks.	29.0	94	.308	1	1	5	7	Justrite Stores	C
Safeway	18.0	41	.439	2	2	1	5	Mr. A. G. Stores	C
A & P	16.0	37	.432	3	4	2	9	Thriftway Food Stores	C
Food Fest (vol.), Buy Way Stores								Wolferman	C
United Sprmks.	11.5	40	.288	4	3	6	13	Monteil's Sprmks.	
Kroger	9.0	25	.360	5	6	4	15	Food Fest (vol.)	
Milgram Food Stores	9.0	23	.391	6	7	3	16	Buy Way Stores	
Grandview United Sprmkt. (vol.)	1.0	4	.250	7	9	7	23	United Sprmks.	C
7-Eleven	.8	10	.080	8	8	8	24	Kroger	A
Hy-Klas (vol.)	.6	36	.017	9	5	9	23	Milgram Food Stores	C
<b>TOTALS</b>	<b>94.9</b>	<b>310</b>						Grandview United Sprmkt. (vol.)	
								Hy-Klas (vol.)	D
								7-Eleven	

Source: Metro Market Studies, Inc., 1965, Dobbs Ferry, New York.

<sup>1</sup>Size of organization in all markets. "A", over \$1 billion in sales; "B", \$40 million to \$1 billion in sales; "C", \$10 million to \$40 million in sales, plus all voluntary and cooperative groups; "D", under \$10 million in sales.