dependent retailer is one who operates one to three stores, even if he is a member of a voluntary group organization.

In some kinds of business such as motor vehicle dealers, service stations and garages, "other food stores" (i.e. excluding grocery and combination stores), and men's clothing stores, independent merchants have maintained a dominant position; in others, such as general merchandise stores and variety stores, chains are dominant. Table 18.2 provides information on the sales trends of chains and independent stores by kind of business in 1970 and 1973 and the percentage change during 1966-69 and 1970-73.

From 1966 to 1969 sales through chain stores rose by 30.3% and through independent stores by 16.1%. From 1970 to 1973 retail sales through both chains and independent stores rose at a greater rate than during the earlier period. Sales through chain stores rose by 42.8%, those through independents by 32.5%.

Grocery and combination store chains continued their sales increases at the expense of independent stores. Although general store chains were less important than independents, from 1970 to 1973 chains made considerably more headway than independents. The dominant chains in the variety stores category showed smaller sales increases than independents. From 1970 to 1973, variety stores were the only category in which the sales increases of the chain segment were less than those of independents. Sales by service station and garage chains are far less than the total sales by independents in this category but a trend to chains seems to be developing. Sales increases of chains compared to those of independents were 50.1% to 22.8% from 1966-69 and 104.1% to 20.6% from 1970-73. Men's clothing store chains account for appreciably fewer sales than independent merchants. Both showed similar sales increases from 1966 to 1969 but from 1970 to 1973 chains recorded sales increases of 49.7% compared with 16.5% for independents. A similar tendency to that of men's clothing stores was observed in shoe store sales. Chains used to account for a smaller proportion of the total but after a sales increase of 31.3% compared with 10.3% for independents, sales through chains are now greater than those made through independent outlets. A similar increase in the strength of chains can be observed in furniture, television and appliance stores, fuel dealers and drug stores. In each case the sales increase through chains compared to that of independents grew much faster in the period 1970-73 than 1966-69.

Table 18.3 illustrates the relative importance of chains by kind of business and the trends from 1966 to 1973. The percentages shown in this Table represent the chains' share of the market. The balance is accounted for by the independents, e.g. in 1973 chain stores accounted for 39.6% of the total market, therefore independent stores accounted for 60.4%. Retail sales through chain store outlets in 1966 accounted for 33.0% of all retail sales, while in 1973 the comparable figure was 39.6%. The largest change occurred in grocery and combination stores where chain stores increased their share of the market between 1966 and 1973 from 44.9% to 55.9%, and in women's clothing stores where chains increased their market share from 26.5% in 1966 to 37.8% in 1973. Service station and garage chains almost tripled their share of the total revenue from 3.4% in 1966 to 9.3% in 1973. Only in "all other food stores", motor vehicle dealers, and fuel dealers, did the chains fail to make progress at the expense of independent operators. However, it is important to remember that independent stores still account for over 60% of all retail sales in Canada and that they have yielded their dominant position only recently in shoe stores and in grocery and combination stores.

Department stores. Department stores have shown the most consistent and substantial growth of all categories of retail trade. Sales are exceeded only by grocery and combination stores and by motor vehicle dealers. In 1966 department store sales represented 8.7% of total retail trade; by 1973 they had increased their market share to 11.3% with total sales slightly over $4,300 million, excluding catalogue sales.

Sales through department stores were 38.7% higher in 1969 than in 1966, and 51.0% higher in 1973 than in 1970. The rate of growth among the various departments within department stores has not been consistent although the nine or 10 departments which dominated sales in 1966 continued to dominate sales in 1973. Above-average increases in both the 1966-69 and 1970-73 periods were recorded for the women's and misses' sportswear department and for men's clothing, both of which are among the largest sections in department stores with sales of over $200 million each in 1973. Jewellery departments also showed above-average sales increases in both time periods, recording one of the highest increases of any section in this