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# THE IMPACT OF MEGA-RETAIL STORES ON SMALL RETAIL BUSINESSES: THE CASE OF SUDBURY, NORTHERN ONTARIO, CANADA<sup>1</sup>

Jorge Virchez and J. Charles Cachon

## **Abstract**

This paper reports the preliminary findings of a study of the perceived impact of the opening of mega-, or box-, retailers on locally owned/operated small to medium-sized retailers in North-Eastern Ontario, Canada. This first phase of the study is focused on the City of Greater Sudbury. Within the city, six primary retailer clusters are identified: the South End, the Downtown and New Sudbury in the north of the city, plus three more immediate and interlinked communities around the city area: Nickel Centre, Rayside Balfour and Valley East. The evolving power center, including Costco and Home Depot, is located in New Sudbury.

## **INTRODUCTION**

This paper reports the preliminary findings of a study of the perceived impact of the opening of mega-, or box-, retailers on locally owned/operated small to medium-sized retailers in North-Eastern Ontario, Canada. This first phase of the study is focused on the City of Greater Sudbury. Within the city, six primary retailer clusters are identified: the South End, the Downtown and New Sudbury in the north of the city, plus three more immediate and interlinked communities around the city area: Nickel Centre, Rayside Balfour and Valley East. The evolving power center, including Costco and Home Depot, is located in New Sudbury.

The research also seeks to identify what competitive advantages smaller retailers try to develop or maintain as they are confronted with the entry of mega-retailers into their immediate location. The remote nature of the mega-retailers market area minimizes possible contamination by the “draw” effects of similar outlets and power centers to the South.

A number of names are attached to the retail “super” store operations including “box retailers”, “discount retailers” and “mega-retailers”. In this

study the term “mega-retailer” is used since this appears to be the more common generic title and includes a variety of large retail operations including Wal-Mart, Costco, Home Depot, Homesense and other similar types of chain stores.

### LITERATURE REVIEW

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Although there are a number of anecdotal reports regarding the effects of mega-retailers, Wal-Mart in particular, empirical research reports are limited.. Noteworthy U.S. studies, including Beaumont (1994), Stone & Artz (1995), Shils & Taylor (1997), have concluded that the opening of mega-retailers in a community has the potential to impact on existing smaller merchants in two ways. Firstly, there will be an effect on the retail business in terms of changes to sales levels; increasing in outlets in the immediate area carrying different product categories to the mega-retail outlets, a result of increased traffic and declining in the overall market area in outlets carrying similar categories (Stone & Artz, 1995). Secondly, changes in the way the merchants conduct their business in terms of competitive strategies: reduction in number of employees; due either to a fall off in sales or increased efficiencies in the business, changes in marketing practices: pricing, product mix and store positioning, location of outlet and recognition of customer service as being central to survival.

Shils & Taylor’s (1999) comprehensive study identifies both social and economic effects, the social effects being the physical and social decline of neighborhoods as retailers fail to survive, noting (in areas visited) «profound changes in joblessness and socialization.»

The most serious economic effects include retail closures as the traditional retailers fail to compete, with the consequent loss of jobs including the employment of the owners themselves and reduced numbers of employees; both a result of Shil & Taylor’s «drain away» effect caused by the presence of mega-retailers shifting activities from various geographic traditional retail centers or clusters.

In seeking community approval to locate stores, mega-retailers have promised increased job numbers. In several situations it is reported the number of jobs have not materialized to the extent promised, a situation exacerbated by the fact that, according to the Stils & Taylor study, “in exchange for 1 new part-time job in a mega-discount store, about 1 1/2 full

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time jobs are eliminated in smaller stores.” Further, most jobs in the mega-retail stores are “minimum wage” with little opportunity for improvement or promotion and most are non-union with all the ramifications implicit in such situations (i.e. absence of provision of benefits to large numbers of employees). In some situations, they report, the mega-retailers have closed down operations after several years. Having forced the closure of much of the local retail trade, the closures leave a retail vacuum and an exacerbated unemployment problem (Dalal, Al-Khatib, DaCosta, and Decker, 1994).

More fundamental economic effects put forward by Stils and Taylor are, firstly, the erosion of “free retail market” choice for consumers both in terms of choice of retailer and location and brand plus other choice issues. Citing 1996 Wal-Mart’s CEO, David D. Glass’s statement at their annual stockholders meeting of that year “We are going to dominate North America.” they point to the ‘decimation of communities’ “main street” retailers, unable to compete.

Conversely, Archer & Taylor (1994) argue that small retailers can survive “in the shadow of the retail giants” the key being levels of customer service that the mega-retailers can’t provide, their very size limiting their abilities in this area. More specifically, Berry (1999, 2001) contends that by using five well-documented retailing best practices, the “Five Pillars of Retailing”, survival and success can be achieved. Berry’s “Five Pillars” of retailing or best retail practices, components of his “retail model”, are:

1. Solve Customers Problems
2. Treat Customers with Respect
3. Connect with Customers’ Emotions
4. Set the Fairest (not lowest) Price
5. Save Customers’ Time

Berry argues that all five of the pillars must be developed in order for the concept to be effective. In the absence of an instrument in the literature to operationalize Berry’s model, the authors have developed five measures or scales described under the methodology section of this article.

While mega-retailing traces its origins back to the creation of the first department store by Aristide Boucicaut in Paris in 1852 (Chirouze, 2003), the arrival of mega-retailing in Canada and Ontario in particular has been the result of the expansion of U.S. mega-retailers into the country since the

late 1980's. Insofar as Ontario is concerned, expansion was confined largely to the more populous southern part of the province with the greater concentration in the Greater Toronto Area (GTA); Jones and Doucet (1998) record 93 (4.5 million square feet) of this form of outlet in the GTA area by 1990 increasing to 268 (11.1 million square feet) by 1998. Expansion has continued with 2002 data showing 614 outlets (29 million sq. feet), (Hernandez, Biasotto, and Jones, 2003; Hernandez, Jones, and Maze, 2003; Simmons, 2003).

### **SETTING OF THE STUDY AND MEGA-RETAIL BACKGROUND OF THE REGION**

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The setting of the study is the City of Greater Sudbury, occupying a key location on the Trans-Canada highway and a hub for access to much of North-eastern Ontario. The city has a population of 160,000 people and is the 14<sup>th</sup>. largest in Canada. The entry of mega-retailers into the market area started in 1999 with the opening of the Costco Wholesale Price Club and the subsequent opening of other mega-retail operations including Home Depot, Homesense and others. The allowance of a lapse of a little over 5 years from the opening of the Costco operation was a deliberate research strategy done to allow any initial market behaviour effects to normalize in order that the true impact on local retailers could be assessed.

### **MEGA-RETAIL BACKGROUND**

With one exception (Business Depot [Staples] who opened a modest-sized store in 1993) mega- retailers' expansion into more remote areas beyond Barrie, a sleeper town some 70 km. north of the GTA, occurred in 1999 with the opening of the approx. 140,000 sq. ft. Price/Costco Warehouse Membership Club (WMC) store in the City of Greater Sudbury (CGS) in Northern Ontario. This was quickly followed by the opening of the 50,000 sq. ft. Home Depot adjacent to the Costco location in Sudbury. With the subsequent opening of other chain retailers, including Pier 1, Danier Leather, Homesense and a large Sears furniture and appliance outlet in the same location, a significant «power center» is being created in the north of the city. Winners and Wal-Mart have also opened stores in other locations,

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both in the north-end of Sudbury, in recent years. Wal-Mart are proposing a 105,000 sq. ft. second store in the south-end of the City with capacity expansion potential for a further 35,000 sq.ft. A further 150,000 sq. ft. of added retail space in the South End is occurring with the expansion of a retail mall with an existing but much expanded Zellers (a Canadian-based chain, formerly subsidiary of U.S.-based chain K-Mart, purchased by the Hudson's Bay Company in 1996), being the key anchor in that expansion.

### MEGA-RETAILERS' MARKET AREA

The designated market area (Malone, Given, Parsons, 1996) from which the mega-stores in Greater Sudbury attract custom comprises much of North-Eastern Ontario and parts of the Western Abitibi region of the Province of Quebec. Centered on the City of Greater Sudbury, the area embraces a number of small- to medium-sized communities and cities including Parry Sound to the South-east; Killarney to the South, Elliot Lake and Sault St. Marie to the East; Hearst, Kapuskasing, Kirkland Lake and Timmins to the North and New Liskeard and North Bay to the East. More detailed discussions of the economic structure of the region have been published elsewhere (Cachon *et al.*, 2001; Mulholland, R. *et al.* 1998).

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Two aspects of the issue of the impact of mega-retailers on the economy in the City of Greater Sudbury and area are important to note. Firstly, the region, is vast and is remote from the major population centers of the southern Greater Toronto Area and Barrie, where the nearest mega-retail outlets are located. The City of Greater Sudbury being about 380 kilometers from Toronto, and approximately 300 kilometers from Barrie. This aspect is discussed further in the Methodology section below.

Secondly, in many cases, particularly in the United States where individual rural states and counties are in constant competition to save local jobs, mega-retailers, have been attracted into regions by low-cost land and promises of property tax exemptions offered by local authorities in the belief that permitting such developments would increase opportunities and improve general economic conditions. This did not occur in Sudbury where the local authorities have made the companies responsible not only for property taxes, but also for infrastructure modifications including roadways, drainage and other municipal or utility-provided services.

## RESEARCH METHODOLOGY

Drawing on the results of the earlier research cited in the literature review, the authors have developed 5 hypotheses:

1. Existing retailers have seen a drop in gross sales since mega-retailers came to the city;
2. Existing retailers have seen more out-of-city clientele since mega-retailers came to the city;
3. Existing retailers can identify clearly their competitive advantages and disadvantages as compared to mega-retailers according to Berry's retail model;
4. Existing retailers can clearly identify the competitive advantages and disadvantages of the mega-retailers according to Berry's retail model;
5. Existing retailers are involved in planning innovative competitive strategies against to enable them to better compete with mega-retailers.

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In addition to the reports noted in the literature review, secondary data included municipal retailer and product/service category data on a local basis. In addition, copies of market review and impact studies conducted on behalf of Costco and others were obtained; such studies are required by the local municipality's planning authority and provide a useful perspective.

Primary data were collected using a cluster sampling approach involving 180 retailers within a 30 km. radius of the center of the City of Greater Sudbury and in the primary retail clusters described above; 78, or 43.3% of the retailers contacted participated in the survey, a proportion similar to that obtained in earlier studies involving personal interviews with retail store owners (Cachon and Cotton, 1997). Retailers trading in product categories directly affected by the box stores were identified and targeted: for example, electronic and computer hardware and software, home hardware, office equipment and supplies, foodstuffs and groceries, appliances, building materials, men and women's apparel, photo equipment and supplies, pharmaceuticals and reading materials.

Six geographic cluster samples were used and included the six primary retail activity areas in the GCS area: the City Center, the area in the south end of the GCS commonly known as The Four Corners, the North-end of Sudbury, Nickel Center, Rayside-Balfour and Valley East; all within a 30 km. radius of the center of the city. The sample included 78 smaller store

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owners, on average in operation for the last 21 years, with an average business surface of 323 m<sup>2</sup> (as compared to 5,000 to 14,000 m<sup>2</sup> for mega-retailers).

A semi-structured, 22-question instrument was developed and pre-tested by the authors, a copy of which is provided as exhibit 2 following this article. It was approved by Laurentian University's Ethics Review Board. The questionnaire included a scale comprising 18 items covering the 5 sets of retail practices proposed by Berry, based upon store image instruments used previously by the authors (Cachon, 1990; Marks, 1976). The questionnaire was administered during the summer and fall of 2003.

The subscales used to measure the five components of Berry's model were the following:

1. Solve Customers Problems:
  - Competence of salespeople
  - Availability of salespeople
  - Service quality to clients
2. Treat Customers with Respect
  - Treating customers with respect
  - Courteous salespeople
3. Connect with Customers' Emotions through the retail experience
  - Cleanliness of the store
  - Choice/variety of products
  - Suppliers/supply chain
  - Value/value chain (any advantages given to clients as compared to competitors)
  - Quality of products
4. Set the Fairest (not lowest) Price
  - Fair pricing
  - Avoiding hidden charges for customers
5. Save Customers' Time
  - Store location

Short cash waiting lines  
Convenient shopping hours  
Easy to figure, non-confusing store layout  
Easy access by road  
Easy parking

The data were analysed with the version 11.5 of SPSS for Windows. Descriptive as well as other statistical analyses were performed.

## RESULTS

In terms of location, 17 stores were located within three kilometers of the mega-retailers in the area called New Sudbury, 18 were located in the Downtown area, less than five kilometers from the mega-stores, 22 were located in the South End of the City, approximately eight kilometers from the mega-stores, and the remaining 21 respondents were located in suburban areas between fifteen and thirty kilometers from the mega-stores.

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On average, these stores employed 4.75 full-time employees in 2003, as compared to 4.92 in 1997 (i.e. two years before the opening of the first mega-store), and 3.39 part-timers in 2003, as compared to 3.27 in 1997. Between 1999 (year of the opening of the first mega-store) and 2003, smaller store reported an average decline in sales of 7.51% for the period, and an average decline of customer traffic from outside the Sudbury area of 0.71%. Both results confirm our hypotheses 1 and 2.

The scale results comparing the smaller store owners' perceptions of their marketing strategy as compared to the mega-box retailers' strategic variables are summarized under table 1. While the scores are self-reported by the respondents, they show a strong awareness from their part of their respective position of strength or weakness as compared to mega-retailers on the 18 variables, thus confirming Hypotheses 3 and 4.

In terms of the respondents' perceptions of using most of Berry's best practices, the Solving Customers' Problems (P1), Respect for Customers (P2), and Fair Pricing (P4) subscales were the areas where they felt having a strategic marketing advantage against mega-store competitors; on the Connecting with customer emotions through retail experience (P3), and Saving Customers' Time (P5) subscales respondents had a significant perception of having an advantage over their mega-competitors in the areas

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of Store Cleanliness (i.e. smaller stores being cleaner than the larger ones), Value for the Customer, Products' Quality, and Store Layout (i.e. smaller stores being non confusing in their layout relatively to mega-stores).

On the latter two subscales, the respondents did not see themselves significantly different from the mega-retailers on the six following strategic variables:

1. Choice and Variety of Products
2. Suppliers/supply chain
3. Store location
4. Convenient shopping hours
5. Easy access by road
6. Easy parking

The fifth hypothesis was more qualitative in supposing that smaller retailers were involved in planning marketing strategies that would allow them to compete with the mega-retail competition. This hypothesis was verified through questions 15, 16, and 22 of the questionnaire, which allowed the authors to derive the list of strategies below. As examples of the responses obtained, Exhibit one provides two verbatim statements given by respondents about competing with mega-retailers in Sudbury. It is also of note that 25 respondents, or 32% of the sample, stated that they were not in direct competition with any mega-retailer, as the latter were carrying "low-end inexpensive products". Other store-owners, however, reported several strategies directly aimed at competing against mega retailers, including the following:

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1. Dropping lines of products or brands sold by big box stores to replace them with others (sometimes more exclusive and expensive);
2. Emphasizing a specific service, such as delivery;
3. Having a competent sales force to retain customers and re-sell to them;
4. Increase store size;
5. Offer better repair services;
6. Increase margins and prices;
7. Offer manual labour;

8. Educate customers and make them realize that Big Box stores foster a low wage, low cost economy with no job security, contrary to the fact that local consumers keep asking for higher wages and job security from large local employers like banks, mining and paper companies, other local branches of large multinational and global corporations, governments, hospitals, schools and public sector employees.
9. Develop or join buying groups of retailers or wholesale chains;
10. Avoid cutting prices and start price wars;
11. Get manufacturers to guarantee that products sold at mega-retail stores are different from those sold to smaller retailers;
12. Match competitor's prices.

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In general, differentiation and niche marketing are the main aspects of a successful competing strategy adopted by smaller retailers against mega-retailers. While it is too early to say whether such strategies will keep a core of smaller retailers in the Greater Sudbury area, it is important to understand that retail wars do not occur in a vacuum, but within a larger economic and social context in constant evolution. That context is not only influenced by private industry competition, but also by decisions made by the various levels of government. This is the object of our following discussion.

#### **DISCUSSION AND CONCLUSIONS. IMPLICATIONS FOR FURTHER RESEARCH**

The economy of Greater Sudbury and Northern Ontario has been described as involving two groups of major employers, large corporations on one side, and local, provincial, and federal governments on the other (Cachon et al., 2001), providing average incomes more than twice those obtained within firms of less than twenty employees (Mulholland et al., 1998, p. 26). The relative importance of small business in the economy of the region has yet to be determined, but it is almost certain that both large corporations and governments, who provide a strong employment base to the region, play a major role in sustaining local small businesses, particularly within the retail sector.

Statistics Canada data issued after the 2001 Census showed a decline in the Greater Sudbury area population of about 10,000 people as compared

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to the 1996 Census. It is likely that many of the departed citizens had lost their employment with one of the three levels of government, which all implemented personnel reduction policies during the period. Meanwhile, there are indications that, in the private sector, areas such as the mining services industry gained jobs and were expanding. It is certainly likely that these two phenomena had an impact on retail sales in the region, besides the arrival of mega-retailers. It is also possible that the long-term effects of the mega-retailers presence in the Greater Sudbury area will take more than a few years to show themselves clearly.

Smaller retailers are well aware of their competitive position and adopt adequate marketing strategy responses to their new competition. However, many of the respondents were not properly informed of the role played by the local government and other levels of government respectively to the mega-retail situation. A number of them were convinced that mega-retailers were receiving tax incentives and various types of «tax breaks» for which local small owners were not being compensated; they were also questioning the local support provided by mega-retailers in terms of charities, sponsorships, give-aways and other demonstrations of good corporate citizenship. There seems to exist a deficit of information between some of the small retailers and the various levels of government about what is being done to sustain and promote local business while keeping a healthy level of competition within the retail sector in the region and the country.

**Table 1**  
 COMPETITIVENESS SCALES DATA:  
 Small retail store owners self ratings as compared to their ratings of  
 mega-stores

Berry's Pillars	Variable	Mean small	Mean mega	t-test significance
P1	Competence of salespeople	81.47	34.93	.000
P1	Availability of salespeople	76.19	36.59	.000
P1	Service quality	88.41	34.64	.000
P2	Respect for customers	91.76	41.32	.000
P2	Courteous salespeople	89.85	40.75	.000
P3	Store cleanliness	80.90	50.15	.000
P3	Choice/variety of products	73.38	66.76	.257 n.s.
P3	Suppliers/supply chain	69.77	59.22	.072 n.s.
P3	Value for customer	73.79	53.1	.000

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P3	Products' quality	82.00	55.46	.000
P4	Fair prices	78.28	59.92	.000
P4	Avoidance of hidden charges	79.84	50.16	.000
P5	Store location	61.94	67.42	.339 n.s.
P5	Easy access	71.31	69.67	.738 n.s.
P5	Easy parking	70.97	67.74	.573 n.s.
P5	Shopping hours	70.00	70.97	.823 n.s.
P5	Store layout	81.31	62.46	.000

NOTE : Each scale was from 0 to 100. The t-tests were paired-samples tests.

EXHIBIT 1

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Many of the box retailers that have come to Sudbury have not affected our business in a typical sense. We are a small mid-to-high end furniture store and therefore the product in many box stores does not compete with our business. However, I do feel they have had a very negative effect on business because of the mentality of the consumer as a result of box stores. The small business has been forced to advertise on a constant basis with the word "Sale". It means we are forced to spend more money on advertising and in truth the product is probably on sale every day of the week. I have seen box and mattresses advertised at chain stores at \$ 2,200 for half price (\$ 1,100), when the exact same product is in our store every day at \$ 995. This is a result of the consumer just needing to see the word "Sale", what I refer to as the box store mentality. I only hope that the consumer becomes smarter when reading advertising of box stores.

Sudbury's non-growth and the loss of small competitors have helped the strong survive. Sudbury is the Toronto of the North, which brings in people for the weekend from out of town, for the theatre, hospitals, schools, Science North and box stores. In return, hopefully the money spent at restaurants, gas stations, accommodations will gradually sift through the system and get to the small retailer. The small retailer has to find their niche to survive. Toronto is our biggest competitor.

## FOOTNOTES

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