CHAPTER I.—SHOE STORES AND THEIR OPERATION

A. DESCRIPTION OF THE BUSINESS.—Shoe stores described in this report are stores selling shoes to the consumer, at retail, as their principal activity. They may sell other commodities than shoes, but in lesser amount. Other stores sell shoes, but unless shoes are their principal commodity they are not classified as shoe stores.

Number of stores and sales.—There were 24,259 shoe stores reported in the census, with aggregate sales of $806,828,929, which is 1.65 per cent of the total retail business of all kinds in the United States. Table 1 enumerates these stores, by States. These are classified in all retail State reports into three kinds; i. e., men's (and boys') shoe stores, women's (and misses' and children's) shoe stores, and family shoe stores serving the entire family. Infants' and babies' shoes may be sold by women's and family shoe stores, but most of the infants' shoe business is done in department stores, dry-goods stores, and apparel stores, rather than in shoe stores.

In the United States there were (1929) 1,402 men's shoe stores with aggregate sales of $61,507,000; 1,666 women's shoe stores with sales of $130,681,000; and 21,191 family shoes stores with sales of $614,641,000. The specialized stores do a larger business per store than do the family shoe stores. Of the latter, practically one-fourth are stores whose sales are between $10,000 and $20,000 annually, and one-third do less than $10,000 annually. Thus 56 per cent of the family stores (those of less than $20,000 annual volume) do 17 per cent of the total business. Only 4 per cent of the business of the specialized men's and women's shoe stores is done by stores of less than $20,000 annual sales.

Size of stores.—About 30 per cent of all shoe stores (7,471) do less than $10,000 of business annually, but they account for only 4.34 per cent of total sales. At the other extreme, 65 stores do more than $500,000 each and account for 6.28 per cent of total sales.

Two-thirds of the stores do less than $30,000 per year per store, but in aggregate these 16,306 stores do only 24.58 per cent of the total business. An equal amount of business is done by a group of 2,898 stores with annual sales of $50,000 to $100,000 each.

Classified according to size of business (annual sales per store), the 24,259 shoe stores of the country appear as shown in the brief table below. The lower group (52.54 per cent in this case) of the stores show average sales of only $8,753 per store, while the upper group (47.46 per cent) average $60,389 per store.

AMOUNT OF ANNUAL SALES	STORES		SALES		Average sales per store
	Number	Per cent	Amount	Per cent	
$500,000 and over	65	0.27	$50,637,000	6.28	$779,031
$300,000 to $500,000	122	.50	45,833,000	5.68	375,680
$200,000 to $300,000	192	.79	45,622,000	5.65	237,615
$100,000 to $200,000	930	3.83	125,809,000	15.59	135,278
$50,000 to $100,000	2,898	11.95	196,712,000	24.38	67,879
$30,000 to $50,000	3,746	15.44	143,918,000	17.84	38,419
$20,000 to $30,000	3,560	14.68	86,727,000	10.75	24,362
Total, upper group	11,513	47.46	695,258,000	86.17	60,389
Less than $20,000 each	12,746	52.54	111,571,000	13.83	8,753
Total, all stores	24,259	100.00	806,829,000	100.00	33,259

CHART 1.—RETAIL SALES OF SHOES AND OTHER FOOTWEAR, BY STATES

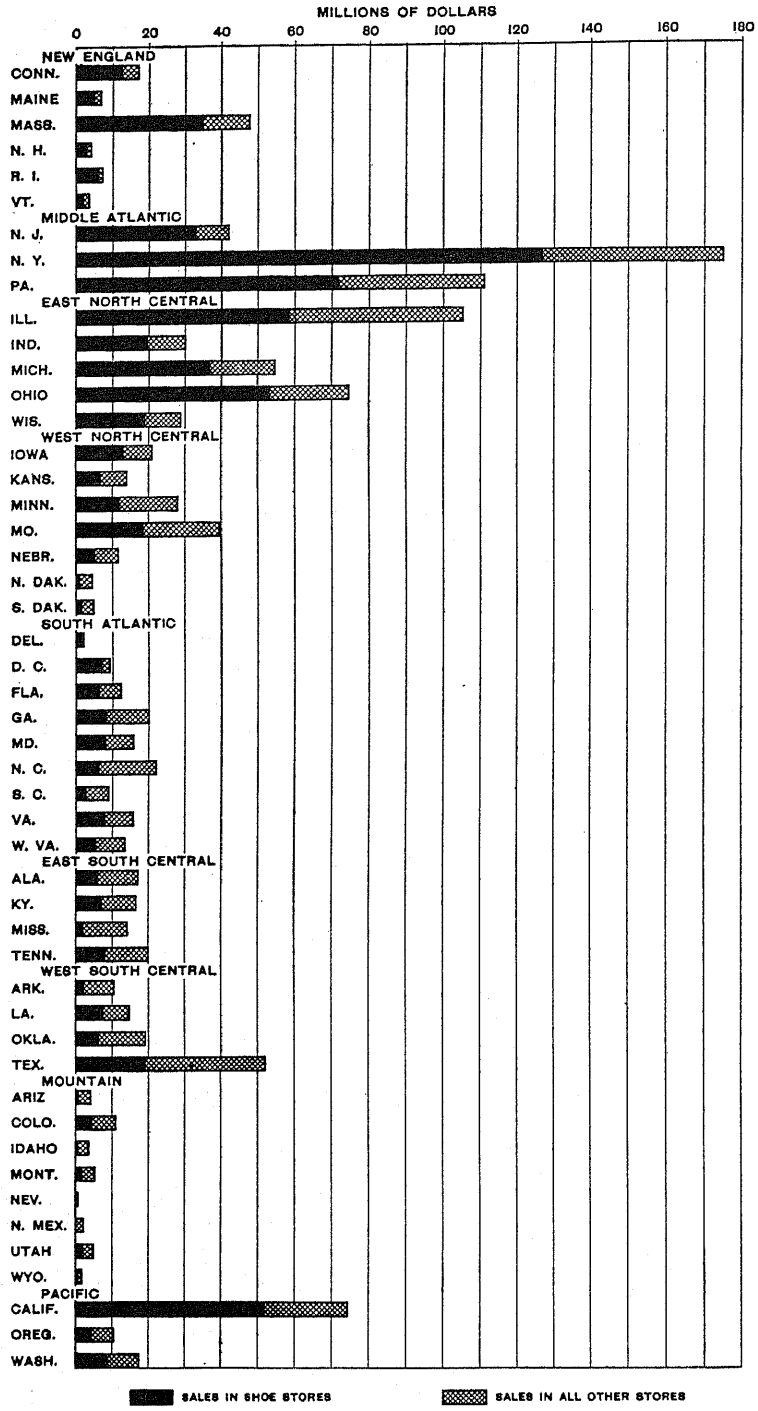

Table 2 of this report analyzes the stores in greater detail, showing also separate analyses for men's stores, women's stores, and family stores. The several State reports provide similar data as to each State, disclosing some significant differences between various sections of the country.

Geographic distribution of stores and sales.—Nearly 21 per cent of the total shoe-store business of the country as reported in the census was done in New York State. Next in order of relative sales come Pennsylvania, Illinois, California, and Ohio. The shoe-store business in these five States was 52.2 per cent of the United States total. It was greater than that of all the remaining 43 States and the District of Columbia. California and Ohio each aggregated more than $55,000,000, and either did as much shoe-store business as was done in the 21 smallest States. The stores in Washington, D. C., alone did as much business as was done in all of the stores in the 8 smallest States. These extreme comparisons are emphasized because of their bearing on the factors which affect the business of shoe stores, as brought out later.

Ninety per cent of the shoe-store business was done in one-half of the States. The table below illustrates the peculiarities of geographic distribution. The States are arranged in the order of their relative sales importance, which is not always the order of population. Obviously the consumption of shoes is not in the same ratio as shoe-store sales. The reason is, of course, that the shoe store is a specialized business. It finds its greatest field in those sections of the country which are industrial, suburban, or metropolitan areas, where population is concentrated. It is found least in distinctly agricultural areas and in States whose population is widely distributed and not readily accessible to large towns or cities. In such areas shoes are sold largely in general merchandise stores, or in clothing and apparel stores, rather than in specialized shoe stores.

STATES IN ORDER OF SALES	Shoe-store sales	Cumulative per cent of United States total	STATES IN ORDER OF SALES	Shoe-store sales	Cumulative per cent of United States total
UNITED STATES, total	$806,828,989	100.00	Oklahoma	$6,957,560	90.62
			Rhode Island	6,491,911	91.42
New York	168,080,429	20.83	Florida	6,468,771	92.22
Pennsylvania	76,124,494	30.26	North Carolina	6,430,320	93.02
Illinois	65,795,820	38.42	Alabama	5,982,756	93.76
California	55,921,575	45.35	Nebraska	5,345,933	94.42
Ohio	55,253,108	52.20	West Virginia	5,316,472	95.08
Michigan	38,231,606	56.94	Maine	5,136,606	95.72
Massachusetts	36,387,745	61.45	Colorado	5,009,978	96.34
New Jeresey	33,549,801	65.61	Oregon	4,763,864	96.93
Texas	21,293,835	68.25	South Carolina	3,010,580	97.30
Missouri	20,401,492	70.78	New Hampshire	2,875,625	97.66
Indiana	20,350,135	73.30	Arkansas	2,573,656	97.98
Wisconsin	19,760,003	75.75	Mississippi	2,260,247	98.26
Iowa	13,431,207	77.41	Utah	2,255,772	98.54
Connecticut	13,226,237	79.05	Montana	2,038,469	98.79
Minnesota	12,401,161	80.59	Vermont	1,989,752	99.04
Washington	9,487,324	81.77	South Dakota	1,820,197	99.26
Maryland	8,888,445	82.87	Delaware	1,611,098	99.46
Georgia	8,631,291	83.94	North Dakota	1,165,718	99.61
Virginia	8,544,427	85.00	Arizona	1,045,115	99.74
Tennessee	8,522,451	86.06	Idaho	800,467	99.84
Louisiana	8,149,403	87.07	Wyoming	518,176	99.91
District of Columbia	7,468,119	88.00	Nevada	435,571	99.96
Kentucky	7,305,067	88.91	New Mexico	354,074	100.00
Kansas	6,965,126	89.76			

The Middle Atlantic division, centering on New York City, accounts for 34.42 per cent of the total sales of all shoe stores in the country. The East North Central division, centering on Chicago, accounts for practically one-fourth

or 24.71 per cent. The Pacific Coast States account for 8.70 per cent. Thus in these three divisions alone were two-thirds of the stores of the country and two-thirds of the sales. By divisions, the stores and sales are as follows:

DIVISION	Stores	Sales	Per cent	DIVISION	Stores	Sales	Per cent
New England	2,346	$66,107,876	8.19	West South Central	992	$38,974,454	4.83
Middle Atlantic	7,709	277,754,724	34.42	Mountain	370	12,457,622	1.55
East North Central	6,401	199,390,672	24.71	Pacific	1,765	70,172,763	8.70
West North Central	2,455	61,530,834	7.63				
South Atlantic	1,590	56,369,523	6.99	Total	24,259	806,828,989	100.00
East South Central	631	24,070,521	2.98				

How size of city affects sales.—Cities of more than 30,000 population contain 62 per cent of the shoe stores of the country, and do more than 77 per cent of the total business. This is the average proportion, but there are 6 States in which there are no cities of 30,000 population. The average for cities of 10,000 to 30,000 population is 12.57 per cent. An even smaller ratio, 9.74 per cent, is the averge for places of less than 10,000 population. In the 6 States in which there are no larger cities, the proportion of sales in cities of more than 10,000 is 51 per cent, and in places of less than 10,000 it is 49 per cent. For more data, see Table 1.

	PER CENT OF—	
	Total population	Total shoe-store sales
Total	100.00	100.00
Cities of over 30,000	47.52	77.99
Cities of 10,000 to 30,000		12.57
Places under 10,000	52.48	9.74

Factors affecting sales of shoe stores.—The following table is arranged to illustrate the factors which affect the sales potentialities of highly specialized stores, with particular application to shoe stores. One factor is population, but population is an unreliable index except for comparisons between States or cities of similar characteristics, and such similarities are rare. It is so unreliable, as is shown throughout the Retail Census reports and in the per capita column below, that it can not be used as an index.

The second factor is total retail sales, which is a good general barometer but never a good specific barometer, for as to any specific kind of store many other factors must be taken into consideration along with total retail sales. It might be assumed that as between two cities or two States of equal total retail sales, the sales in shoe stores would be about the same, but such is seldom the case. The position of the shoe store with respect to other kinds of stores is shown below in the form of a position index, with 100 representing the average ratio of shoe-store sales to total retail sales.

STATES	Per cent of shoe-store sales to total retail sales	Position index of shoe stores	Population per square mile (1930)	Per capita sales in shoe stores
UNITED STATES, total	1.65	100	41.3	$6.57
New York	2.38	144	264.2	13.58
District of Columbia	2.21	134	7,852.7	15.34
Rhode Island	2.04	124	644.3	9.44
Pennsylvania	2.00	121	214.8	7.90
Ohio	1.93	117	163.1	8.31
New Jersey	1.82	110	537.8	8.30
Illinois	1.78	108	136.2	8.62
Massachusetts	1.77	107	528.6	8.56
California	1.75	106	36.5	9.85
Connecticut	1.73	105	333.4	8.23
Michigan	1.72	104	84.2	7.90
Louisiana	1.71	104	46.3	3.88
Indiana	1.67	101	89.8	6.28
Maine	1.67	101	26.7	6.44
Wisconsin	1.60	97	53.2	6.72
Delaware	1.56	95	121.3	6.76
New Hampshire	1.56	95	51.5	6.18
Maryland	1.44	87	164.1	5.45
Virginia	1.42	86	60.2	3.53
Missouri	1.40	85	52.8	5.62
Iowa	1.38	84	44.5	5.44
Georgia	1.36	82	49.5	2.97
Tennessee	1.32	80	62.8	3.26
Vermont	1.31	79	39.4	5.53
Florida	1.29	78	26.8	4.41
Kentucky	1.24	75	65.1	2.79
Washington	1.24	75	23.4	6.07
Minnesota	1.18	72	31.7	4.84
West Virginia	1.19	72	72.0	3.07
Utah	1.15	70	6.2	4.44
Alabama	1.14	69	51.6	2.26
Colorado	1.07	65	10.0	4.84
Oregon	1.04	63	10.0	4.99
Texas	1.04	63	22.2	3.66
South Carolina	1.00	61	57.0	1.73
North Carolina	.99	60	65.0	2.03
Nebraska	.95	58	17.9	3.88
Kansas	.94	57	23.0	3.70
Oklahoma	.88	53	34.5	2.90
Nevada	.86	52	.8	4.78
Montana	.83	50	3.7	3.79
South Dakota	.72	44	9.0	2.63
Arkansas	.63	38	35.3	1.39
Mississippi	.55	33	43.4	1.12
Arizona	.53	32	3.8	2.40
Wyoming	.51	31	2.3	2.30
North Dakota	.50	30	9.7	1.71
Idaho	.47	28	5.3	1.80
New Mexico	.30	18	3.5	.84

In this table there are 13 States and the District of Columbia wherein the position of the shoe store is better than average, or over 100. That means that in those States the conditions lend themselves to retail specialization. Study of the States throws much light on the nature of such conditions. There are nine States in which the position index is 50 or less. As to these States it is fair to conclude that at least one-half of the business which normally would go to shoe stores actually is going to other stores, mainly general merchandise stores and country general stores, because the local conditions are not conducive to specialization.

The States are Montana, South Dakota, Arkansas, Mississippi, Arizona, Wyoming, North Dakota, Idaho, and New Mexico. It is apparent that not climate, nor mere size of population, nor relative wealth, nor standards of living are the sole controlling factors. There is no reason to believe that the per capita consumption of shoes is any less in these States than in many States with a much higher position index. Almost exclusively the factor working against specialization is the sparsity of population, the fact that the population is spread out over great areas, with few large retail centers. The retail needs of the people are

supplied in innumerable small towns by general merchandise stores or clothing stores, and in rural areas by country general stores, and relatively few trading centers are so situated that they are accessible to a sufficient number of people to provide the conditions necessary for the development of specialized stores.

The per capita sales column is added to this table for comparison with the position index, to illustrate the difference between the two barometers. One reason why per capita sales is not a good index alone is that in many States there are large cities on or near the State line which draw trade from the residents of adjoining States, and retail customers insist on trading where they please, regardless of their place of residence. Typical instances of cities which draw trade in some lines from other States are New York, Philadelphia, Cincinnati, Chicago, Omaha, and El Paso. As a relative measure of cities, the per capita sales figure is even less reliable than as an index of States.

Cash versus credit sales.—Of the 24,259 shoe stores, 19,955 are included in a detailed analysis in which the stores are classified according to degree of credit business. About 72 per cent of them are stores selling entirely for cash, and they do 68½ per cent of the total business. The balance sell on credit as well as for cash, but credit is relatively a small factor in the shoe-store field.

Based upon this 19,955-store analysis, representing nearly 90 per cent of total sales, it is evident that the total proportion of credit extended by shoe stores is about 9 per cent of their total sales, although it is 29 per cent of the total sales of those stores which extend credit. The analysis follows:

CLASSIFICATION	Number of stores	Total sales, cash and credit	Approximate cash proportion	Approximate credit proportion
All-cash stores	14, 401	$474, 521, 000	$474, 521, 000	----------
Up to 10 per cent credit	2, 473	62, 343, 000	59, 226, 000	$3, 117, 000
11 to 20 per cent credit	958	31, 965, 000	27, 170, 000	4, 795, 000
21 to 30 per cent credit	725	27, 273, 000	20, 455, 000	6, 818, 000
31 to 40 per cent credit	569	29, 235, 000	19, 003, 000	10, 232, 000
41 to 50 per cent credit	380	23, 333, 000	12, 833, 000	10, 500, 000
51 to 60 per cent credit	176	21, 453, 000	9, 653, 000	11, 800, 000
61 to 70 per cent credit	120	12, 264, 000	4, 292, 000	7, 972, 000
71 to 80 per cent credit	66	5, 193, 000	1, 298, 000	3, 895, 000
More than 80 per cent credit	87	4, 911, 000	737, 000	4, 174, 000
Total analyzed	19, 955	692, 491, 000	629, 188, 000	63, 303, 000
Per cent, sales	----------	100. 00	90. 86	9. 14

Men's shoe stores sell almost entirely for cash, the sales of all-cash stores amounting to 90 per cent of the total sales of men's stores. Even the remaining 10 per cent is partly cash. Women's stores average a higher proportion of cash business than family stores, although both of the latter classifications run quite close to the general averages described above. One reason why the more specialized men's and women's classifications appear to do a smaller proportion of credit business than family stores is because a larger proportion of them are chain stores. Shoe chains, as a rule, operate entirely on a cash basis, as is brought out later in this report. Table 3–A herein analyzes the three kinds of stores in greater detail, according to degree of credit. Table 3–B shows a comparison by States, concerning which full data by degree of credit and by kinds of stores can be found in the several State reports.

Independents versus various types of chains.—Chain organizations classified as local, sectional, or national chains operated 5,250 stores with total sales of $315,432,210 in 1929; manufacturer-controlled chains operated 375 stores with total sales of $29,939,110; and leased-department chains operated 474 stores or shoe departments in other kinds of stores, with aggregate sales of $23,768,440.

The two latter classifications are not further segregated into local, sectional, and national types.

Thus, of the total of 24,259 stores of all types, 6,099 or 25 per cent are operated by 320 chains. The total sales of these chain organizations amounted to $369,139,760, which is 45.8 per cent of the total sales of all shoe stores.

Of the 18,160 independent stores, 16,013 are single-store independents with sales of $343,014,731, which is 42½ per cent of total sales; 1,925 are two and three store independents with sales of $88,803,136, which is 11 per cent of the totals. The balance are principally small local branch systems built up around old-established downtown shoe stores. There are 222 such stores, with aggregate sales of $5,871,362, including both the parent stores and the branches. The latter differ from chains in that they are merchandised and supplied from the stocks of the parent stores, the original stores having elected to expand by the addition of small suburban and neighborhood branches in lieu of adding to the downtown stores. Slightly more than one-half of the sales of local branch systems are in the parent stores and in neighborhood branches in the same cities; the balance comes from the suburban branches and those in near-by small cities.

Most manufacturer-controlled and leased-department chains are national in scope and, like the national chains, they operate mostly in the larger cities. It is significant of a difference in policy between chains and independents that 91.5 per cent of the sales of national chains are in cities of more than 30,000 population, 7.6 per cent in cities of 10,000 to 30,000 population, and less than 1 per cent in places of smaller than 10,000 population; whereas, in contrast, 62.5 per cent of the sales of single-store independents is in cities of more than 30,000 population, 18 per cent in cities of 10,000 to 30,000 population, and 19.5 per cent in places of less than 10,000 population. Local chains follow more closely the policy of national chains, with nearly 89 per cent of their sales in the larger cities.

In the larger cities, those of more than 30,000 population, 53 per cent of the shoe-store business is done by chains. In cities of 10,000 to 30,000 population, 26½ per cent is in chain stores; in places of less than 10,000 population, only 9½ per cent of the business is in chain stores. These proportions vary somewhat in different sections of the country, as is shown in Table 4 herein.

The average annual sales of chain stores amounted to $60,526 per store, while that of independents was $23,548. Chains operating in the large cities showed the highest sales per store, averaging $103,000. Leased-department chains averaged $50,144 per operating unit, while stores operated directly by shoe manufacturers averaged $80,000 per year per store.

Shoe chains.—In the Merchandizing Series of the Retail Census there is a detailed report on shoe chains (No. R-67)[2] which discloses that more than one-sixth of all chain units operating at the end of 1929 were established in that year, and that 37 per cent were opened between 1925 and 1928, inclusive. It also shows that 60 per cent of all chain shoe stores were located in the two geographic divisions of which New York and Chicago are the principal cities. The Chicago district shows the highest percentage of recent growth of chains, with the Pacific coast district lowest.

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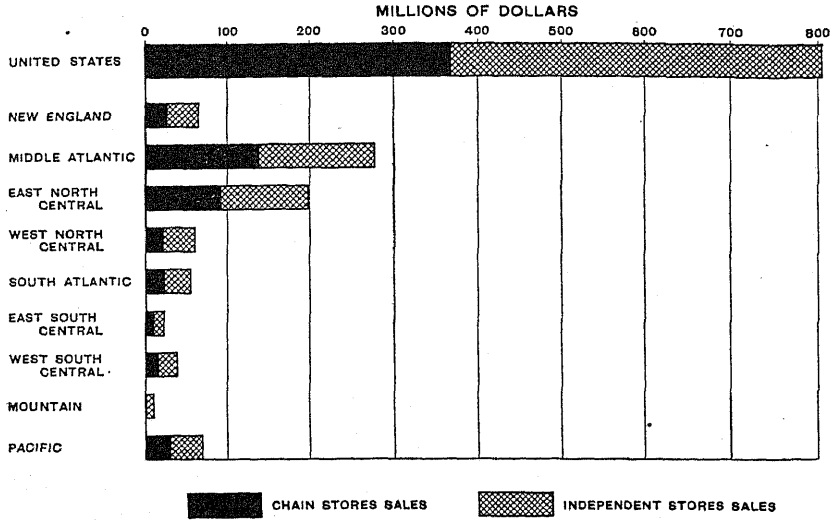
[2] Retail Distribution by Shoe Chains (Distribution No. R-67) may be purchased from the Superintendent of Documents, Government Printing Office, Washington, singly or in quantity at 5 cents per copy. A list of the 18 reports comprising the Merchandising Series may be had from the Bureau of the Census upon request.

CHART II.—SHOE STORES—RATIO OF CHAIN-STORE SALES TO INDEPENDENT-STORE SALES



The following table shows the ratio of chain sales to total shoe-store sales:

RATIO OF SHOE CHAIN SALES TO TOTAL SHOE STORE SALES, BY GEOGRAPHIC DIVISIONS

DIVISION	ALL SHOE STORES				FAMILY SHOE STORES			
	All shoe stores		Chain stores		All shoe stores		Chain stores	
	Number	Net sales	Number	Net sales	Number	Net sales	Number	Net sales
United States—total	24,259	$806,828,989	6,099	$369,149,760	21,191	$614,640,960	4,744	$265,344,857
Ratio				*45.75*				*43.17*
New England	2,346	66,107,876	478	27,397,065	2,126	56,071,572	439	25,009,866
Ratio				*41.44*				*44.60*
Middle Atlantic	7,709	277,754,724	1,912	138,595,395	6,642	195,178,986	1,527	95,601,879
Ratio				*49.90*				*48.98*
East North Central	6,401	199,390,672	1,753	92,963,391	5,791	162,812,815	1,409	71,761,065
Ratio				*46.62*				*44.08*
West North Central	2,455	61,530,834	479	22,450,173	2,208	50,581,648	337	15,043,325
Ratio				*36.49*				*29.74*
South Atlantic	1,590	56,369,523	487	24,572,983	1,314	41,969,874	373	17,847,502
Ratio				*43.59*				*42.52*
East South Central	631	24,070,521	206	11,600,072	507	15,903,604	134	6,494,263
Ratio				*48.19*				*40.84*
West South Central	992	38,974,454	315	17,249,406	750	25,404,612	183	8,816,849
Ratio				*44.26*				*34.71*
Mountain	370	12,457,622	48	2,533,883	334	11,035,471	38	1,991,962
Ratio				*20.34*				*18.05*
Pacific	1,765	70,172,763	421	31,787,392	1,519	55,682,378	304	22,778,146
Ratio				*45.30*				*40.91*

RATIO OF SHOE CHAIN SALES TO TOTAL SHOE STORE SALES, BY GEOGRAPHIC DIVISIONS—Continued

DIVISION	WOMEN'S AND CHILDREN'S SHOE STORES				MEN'S SHOE STORES			
	All shoe stores		Chain stores		All shoe stores		Chain stores	
	Number	Net sales	Number	Net sales	Number	Net sales	Number	Net sales
United States—total	1,666	$130,680,659	850	$78,294,199	1,402	$61,507,370	505	$25,510,704
Ratio				*59.91*				*41.48*
New England	70	4,345,404	17	1,777,435	150	5,690,900	22	609,764
Ratio				*40.90*				*10.71*
Middle Atlantic	504	52,039,973	201	31,472,135	563	30,535,765	184	11,521,381
Ratio				*60.48*				*37.73*
East North Central	365	27,210,422	244	16,406,040	245	9,367,435	100	4,796,286
Ratio				*60.29*				*51.20*
West North Central	156	8,281,162	110	6,301,821	91	2,668,024	32	1,105,027
Ratio				*76.10*				*41.42*
South Atlantic	179	10,954,932	73	5,145,641	97	3,444,717	41	1,579,840
Ratio				*46.97*				*45.86*
East South Central	74	6,212,053	50	4,213,248	50	1,954,864	22	892,561
Ratio				*67.82*				*45.66*
West South Central	177	10,913,289	103	7,180,113	65	2,656,553	29	1,252,444
Ratio				*65.79*				*47.15*
Mountain	24	900,838	6	262,262	12	521,313	4	279,659
Ratio				*29.11*				*53.65*
Pacific	117	9,822,586	46	5,535,504	129	4,667,799	71	3,473,742
Ratio				*56.35*				*74.42*

Since many chains sell at a single fixed price, or within a fixed price range, a study was made of 34 chains which could be classified definitely as to price lines. Of these 34 chains, 16 operated family shoe stores, 11 operated women's stores, and 7 operated men's stores. The aggregate sales of the 34 chains was 58 per cent of the total sales of all shoe chains, so it is fair to assume that the showing is representative.

The study indicates that in all three kinds of stores the chains selling in the lower price groups operated at a lower total expense and at a lower pay-roll rate. In the family classification, 4 chains selling at prices over $8 showed average operating expenses of 38.3 per cent, of which pay roll was 15.4 per cent of sales. Chains selling shoes at $4 to $8 showed average operating expenses of 32.2 per cent, and 10 chains selling at $1 to $6 showed an average rate of 29.8 per cent, of which pay roll was 9.3 per cent.

Of the 11 chains operating 388 women's stores, 3 selling shoes at $8.50 and above showed an average expense rate of 27.5 per cent, of which pay roll was 11.8 per cent. The expense rate of chains selling below $8.50 was 27.1 per cent, of which pay roll was 9.8 per cent.

Four chains operating 230 men's stores with price ranges of $8 to $15 showed an average expense rate of 37.9 per cent, of which pay roll was 12.1 per cent. In comparison, 3 chains with 143 stores selling at prices of $4.40 to $8 showed an average expense rate of 27.2 per cent, with pay-roll cost of 7.3 per cent.

Cost of doing business.—The average expense ratio of all shoe stores, both chain and independent, all over the United States, is $29.39 per $100 of sales, of which pay roll is $13.71, and rent averages $7.63. The balance consists of advertising, supplies, taxes, heat, light, power, insurance, interest, delivery service, travel, communication, and a score of other expenses incidental to the operation of shoe stores.

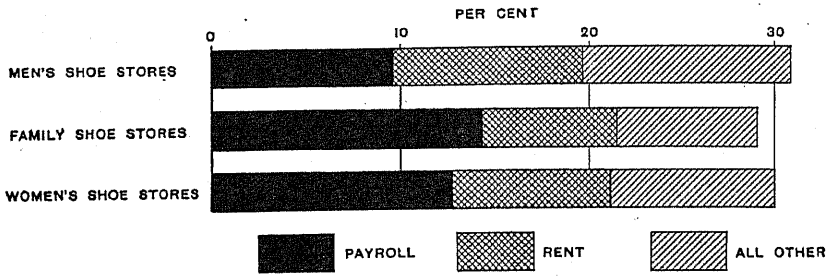
There is little difference in expense between the three kinds of stores. Men's stores average $30.98, women's stores average $30.05, and family shoe stores average $29.09 per $100 of sales. There is, however, a marked difference in

policy between the three kinds of stores which is evident in a closer examination of expense. Men are easier to sell to than women, but are harder to attract to the store. Men very seldom shop around, and when they enter a store they nearly always buy if they can be fitted at the price desired. Consequently, location is of primary importance in men's stores, and in 1,304 of the 1,402 men's stores in the United States the average rent is 10.17 per cent of sales. Pay-roll cost, on the other hand, is the lowest of the three kinds of stores, averaging 9.65 per cent.

Women's stores pay less rent, averaging 8.43 per cent of sales, but their pay-roll cost averages 12.74 per cent. Family stores are less concerned with expensive locations, the rental cost averaging 7.17 per cent of sales, but their pay-roll cost is the highest of all, averaging $14.33 per $100 of sales. One primary reason is that many family shoe stores employ separate sales forces for women's and children's shoes on the one hand and men's and boys' shoes on the other, with a resulting higher selling cost than exists in either of the more specialized stores.

Manufacturer-controlled chains operate at an average expense, exclusive of central-office and merchandising expense, of 27.61 per cent of their sales. Leased-department chains show an average expense ratio of 31.89 per cent.

CHART III.—OPERATING EXPENSES—PER CENT OF SALES



It costs more to operate a store in a large city than in a smaller city, and more in a small city than in a country town. That is because most of the factors entering into the cost of doing business cost more in larger cities. Rent is higher, wages are higher, delivery is more costly, supplies, light and power, telephones, and nearly everything that is required to operate a store cost more in a big town, and still more in a big city. The increased sales in the larger communities do not offset the increase in expense, except in pay roll. This retail principle has been pointed out and illustrated repeatedly in retail reports, and shoe-store expenses illustrate it again.

In cities of more than 30,000 population, the expense ratio averages $30.23; in cities of 10,000 to 30,000 it averages $26.95; and in places of less than 10,000 it averages $25.77 per $100 of sales, which is a decrease of about 15 per cent from the average expense rate in the larger cities. There is no doubt but that this principle, established so thoroughly by the Retail Census, is a factor to be taken into account in future consideration of such questions as city congestion, the movement of population to and away from the cities, and the effect on living costs of the concentration of population in large cities.

Expense data are shown in convenient form in Table 5 herein.

Cost of rent.—About 20,000 of the 24,259 stores are in leased premises, and these stores account for 92.3 per cent of total sales of all stores. The cost of rent averages 7.63 per cent of sales, or $7.63 of each $100 of sales is paid to the landlord. In an earlier paragraph it was pointed out that men's shoe stores pay the highest

average rent, 10.17 per cent; women's stores average 8.43 per cent; and family stores average 7.17 per cent. (See Table 6.)

In comparison with these averages for all stores, independent and chain, the men's-store chains pay average rent of 11.18 per cent, women's-store chains average 8.50 per cent, and family-store chains average 8.60 per cent. Seventeen large national chains of 2,657 stores operating in all sizes of cities, but mostly in very large cities, average 9½ per cent for rent; 113 chains of 1,007 stores operating entirely in cities of more than 100,000 population report average rent cost of 9.09 per cent; 6 chains of 26 stores in cities of 25,000 to 100,000 population report average rent cost of 6.46 per cent; while 20 chains of 116 stores, all in cities of less than 25,000 population, show an average rent expense ratio of 4.86 per cent.

Stocks on hand.—Stocks of merchandise on hand for sale are reported in all retail reports at cost values as of the end of the reporting year, and are not a fair index of turnover. Turnover is the rate at which the physical stock "turns over" in the course of sale. It is usually expressed in terms of the number of turns per year, and to compute it there is required not only the total of annual sales but also the *average* stock throughout the year, at retail values. Average stock should be computed by adding the opening stock and the stock on hand at the end of each month, dividing the total by 13. In many kinds of business the stock on hand, at the end of the year, is not at all representative of the average stock carried throughout the year.

The heaviest stocks in shoe stores occur at the beginning of the fall season and of the spring season. There are two other seasonal peaks, smaller than the two seasonal peaks mentioned. The stock on December 31 should be well below the yearly average, and less than one-half of the two seasonal peaks. In the well managed shoe store the stock is divided into several departments or sections, and each section is separately inventoried and controlled with regard to sales and rate of turnover. Inventories are at cost and retail, or at retail reduced to a cost equivalent by means of the well-established retail method of stock accounting, which uses the principle of the cumulative mark-up. The cumulative mark-up is a current, running, accumulative ratio between cost and the marked retail price, by means of which it is possible to determine the cost equivalent of any desired total of average sales without costing each individual sales check. Turnover may be computed by dividing the annual sales by the *average* stock at retail values, or by dividing the cost equivalent of the annual sales by the average stock at cost, either method producing the correct annual rate of turnover.

In the absence of sufficient data, no attempt is made in this report to estimate the turnover. Individual stores may gain some helpful data by comparing their stock at cost at the end of the year with the average stock at retail, and then comparing the results with the following:

KIND OF SHOE STORES	Annual sales (1929)	Stock at cost, Dec. 31
21,191 family shoe stores	$614, 640, 960	$204, 282, 210
1,666 women's shoe stores	130, 680, 659	23, 294, 910
1,402 men's shoe stores	61, 507, 370	13, 569, 590
All shoe stores	806, 828, 989	241, 146, 710
15,039 stores in cities of more than 30,000 population	626, 818, 382	170, 603, 200
3,634 stores in cities of 10,000 to 30,000 population	101, 448, 355	36, 825, 090
5,586 stores in places of less than 10,000 population	78, 562, 252	33, 718, 420

Returned goods and allowances.—Returned goods do not constitute a serious problem in the shoe store, averaging only 1.1 per cent of sales. In men's stores

the percentage of return is insignificant, amounting to less than one-tenth of 1 per cent. The total of returned goods and allowances reported by all stores in cities of more than 10,000 population in 1929 was $7,848,766 in comparison with net sales of $728,266,000.

Receipts from repairs.—Nearly 1 per cent of the total sales of men's stores consisted of repairs, which brought in a total of $507,553. Women's stores, with more than twice the sales of men's stores, report only one-half the income from repairs, or $259,896, which is two-tenths of 1 per cent of their sales. In family shoe stores the total income from repairs was $8,769,695, which is 1.43 per cent of their total sales. Total receipts from repairs, in all shoe stores, amounted to $9,537,144. This is exclusive of the receipts of shoe-repair shops, which were not included in the retail census.

Commodities sold by shoe stores.—Any national summary of sales by commodities must be subject to many qualifications, principally because of the widely varying conditions under which retail shoe stores are operated in different sections of the country.

These differences arise from many causes, of which one is the density of population, which influences the degree of specialization. Another is customer preference or habit. A third cause is the character and aggressiveness of local competition, particularly department and specialty store competition in the sale of shoes. A fourth cause is the character of the community served. All of these have a direct bearing upon what commodities are sold by shoe stores in any community, and in what proportion.

With these qualifications and difficulties in mind, it is apparent that national averages obtained by accumulating the total dollars of sales of each commodity and dividing by the total sales of all shoe stores would be less descriptive than State figures, but for some purposes what is wanted is a predominating or "usual" percentage to represent the "usual" practice. To attain that objective, the bureau has averaged the several State percentages, without weighting, into geographic divisional averages, and then has averaged the divisional averages to produce national figures. In the case of shoe stores the results are almost identical with the computed commodity sales shown in Table 7.

In arriving at divisional averages by the "predominating" method, some commodities are reported sold by shoe stores in all of the States in a division, and these are listed as "consistently reported." Other commodities are reported in some States and not in others. If the commodity is omitted in more than one State, the item is listed as "variously reported," meaning that it is sold in shoe stores in some States but not in others.

A similar method of arriving at national percentages has been used, except that the divisional averages were substituted for State figures. Thus, if a commodity is reported consistently in all divisions, or all but one, it is listed as "consistently reported" nationally. The national figure is the average of the divisional figures, unweighted, plus the chain ratios obtained from the report on Retail Distribution by Shoe Chains.

It is not the purpose of these national averages to provide a simple means of arriving at national sales by commodities. Their purpose is merely to answer, in a general way, the question as to the nature of the business done by each of the three kinds of shoe stores—what commodities are usually sold and in about what proportions. Because of the widely varying conditions encountered in different sections of the country, some of which are suggested above, the individual State reports should be used in any detailed analysis of commodity sales, and they have been so used in Table 7, which differs but little from the following ratios obtained by the method just described:

NATIONAL AVERAGES—FAMILY SHOE STORES

	Per cent
Consistently reported:	
Women's shoes	48.0
Men's shoes	28.0
Misses' and children's shoes	5.8
Rubber and other footwear	5.2
Boys' and youths' shoes	5.7
Hosiery, women's	4.5
Infants' shoes	.9
Variously reported	1.9
Total	100.0

NATIONAL AVERAGES—WOMEN'S SHOE STORES

	Per cent
Consistently reported:	
Women's, misses', and children's shoes	83.5
Variously reported	16.5
Total	100.0

The variously reported commodities are shown below, the smaller figure representing the lowest percentage consistently reported in any geographic division and the larger figure representing the highest percentage reported consistently in any division:

	Per cent
Hosiery	9.2–14.2
Rubber and other footwear	1.0– 2.2
Miscellaneous merchandise	.3– .6

NATIONAL AVERAGES—MEN'S SHOE STORES

	Per cent
Consistently reported:	
Men's and boys' shoes	93.2
Variously reported	6.8
Total	100.0
Rubber, infants', and other footwear	2.4–3.8
Furnishings (hose, neckwear, etc.)	1.1–2.8
Miscellaneous merchandise	.3–2.4

(Other commodities in some divisions.)

Dollars of commodity sales.—As a check on the above method of determining predominating percentages, the actual computation of commodity sales in all shoe stores, in all States, reveals dollar totals shown in Table 7.

This commodity-sales table indicates that $42,000,000 of women's hosiery, more than $3,400,000 of men's furnishings (largely hose and neckwear), and more than $900,000 of leather goods and luggage are sold in shoe stores. See Table 7 for further information.

B. COMPETITION WITH OTHER KINDS OF STORES.—It is apparent that a considerable proportion of the more than $800,000,000 of shoe-store sales is not shoe sales. In some States shoe stores have increased their sales of related commodities to 10 per cent or more of their total business. On the other hand, shoes are sold in increasing quantities by dry-goods and department stores, by men's clothing and furnishings stores, and by family clothing stores. In addition to country general stores, which probably sell more than $115,000,000 of shoes and other footwear, there are eight kinds of stores which are direct and sometimes

formidable competitors of shoe stores in the sale of shoes. They are shown in detail in Table 8, of which the following is a summary:

	Approximate sales of footwear		Approximate sales of footwear
Department stores	$208, 296, 000	Dry-goods stores	$27, 360, 000
General merchandise stores	49, 654, 000	Women's ready-to-wear specialty stores	15, 643, 000
Mail-order houses (catalogue only)	35, 465, 000	Variety, 5-and-10, and to-a-dollar stores	14, 200, 000
Family clothing stores	31, 351, 000		
Men's clothing and furnishings stores	29, 184, 000		

In view of the growing importance of these other kinds of stores, in the distribution of shoes at retail, it is pertinent to inquire into the causes. One, of course, is the convenience to the customer of being able to purchase shoes at the time and place of purchasing other apparel. Another is the fact that shoe stores are a specialized kind of business, 77 per cent of whose sales are in cities of more than 30,000 population, 12½ per cent in cities of 10,000 to 30,000, and only 9.74 per cent in places of less than 10,000, providing ample opportunity in the smaller cities and towns for the sale of shoes in general merchandise stores and in country general stores. Another cause may be found in a comparison of the cost of doing business, especially in places of less than 30,000 population.

CHART IV.—SHOE SALES IN VARIOUS KINDS OF STORES

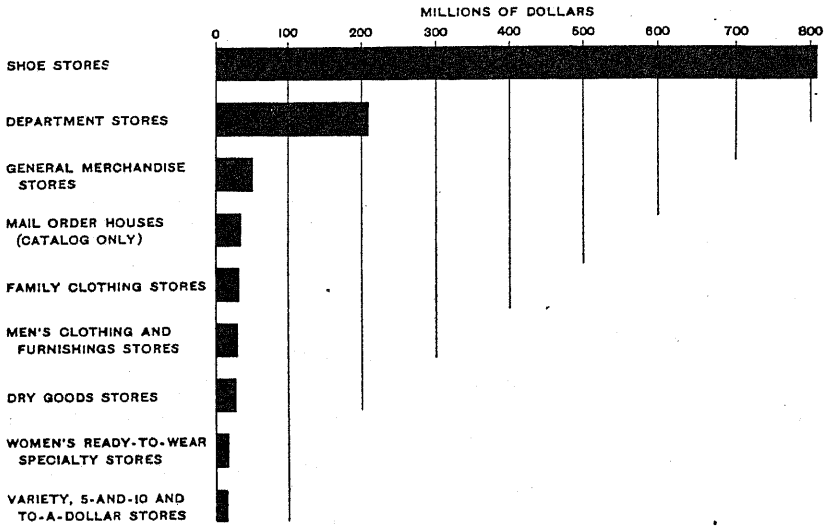
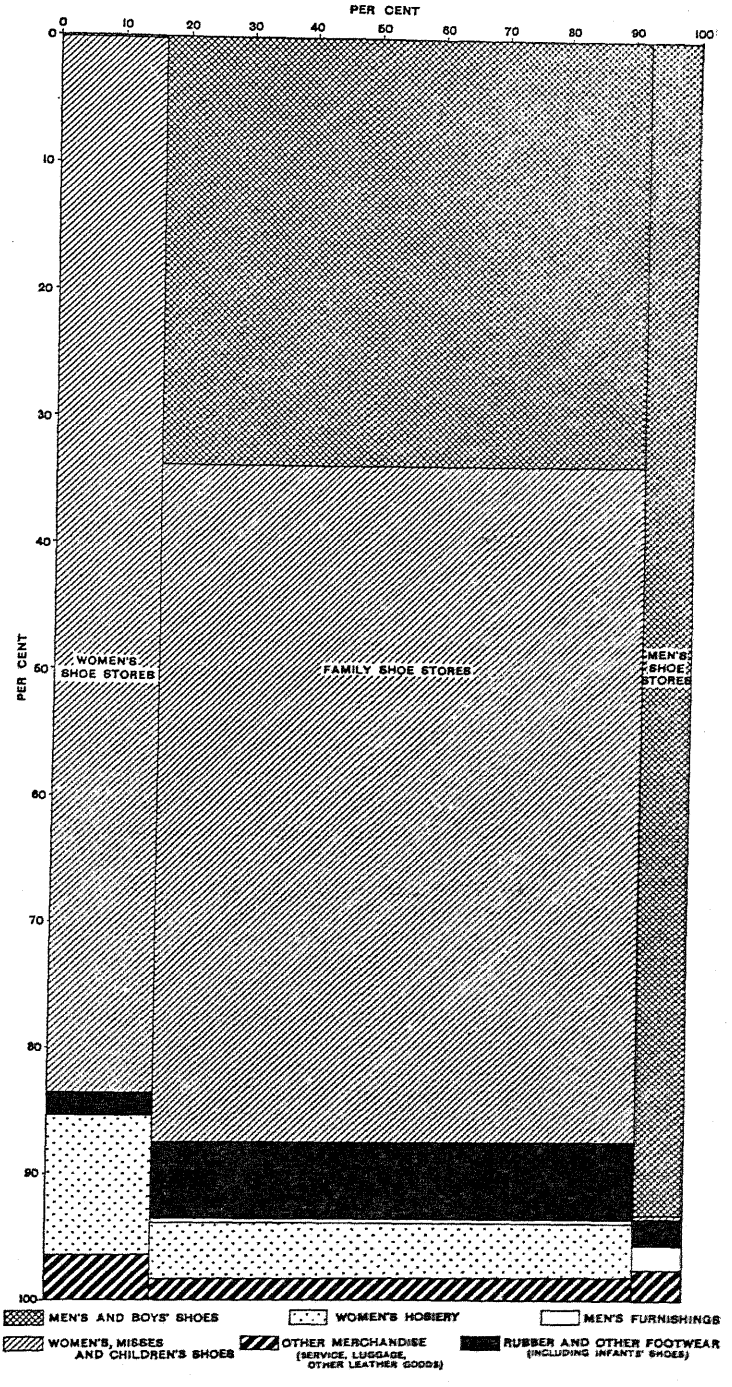


Chart VI. – Commodities sold in shoe stores in proportion to total sales in such stores.



Operating expenses compared.—Here are the operating expense ratios of shoe stores and seven principal competitors:

	RATIO OF OPERATING EXPENSES TO SALES			
	All cities and places	Cities of more than 30,000	Cities of 10,000 to 30,000	Places of less than 10,000
	Per cent	*Per cent*	*Per cent*	*Per cent*
Shoe stores	29.39	30.23	26.95	25.77
Department stores	28.36	29.24	24.22	19.84
Women's specialty stores	29.10	29.91	25.98	24.38
Men's clothing and furnishings stores	28.93	30.58	26.28	23.48
Family clothing stores	28.44	30.48	27.36	21.24
Dry-goods stores	24.17	25.85	25.71	21.47
General merchandise stores	20.43	23.30	20.59	19.26
Variety stores	24.96	25.10	24.80	24.77

Department stores are the largest competitors of shoe stores, and do about 28½ per cent as much shoe business as do all the shoe stores together. (See table on p. 20.) Shoe departments in department stores are increasing steadily in size, in prominence of location, and in sales. Operating at a slightly lower expense rate than shoe stores, department stores are inclined to use a lower average marking rate and to operate on smaller stocks, although they are unable by the nature of their service standards to restrict sizes entirely to the middle or fast-moving size groups. They are inclined to keep within a very few price lines.

Women's specialty stores often are considered large distributors of shoes, and in some States they have developed such business, but nationally they are a much smaller factor than they might be. Properly related merchandise is the least costly to sell, and shoes are considered not only properly related to apparel, but there are obvious advantages to the customer in being able to select shoes at the time and place of buying outer apparel. At the time of the census, however, women's specialty stores were doing only about $15,600,000 of shoe business, which is an insignificant proportion in comparison with the $1,087,600,000 of total sales of such specialty stores. Men's clothing and furnishings stores, with 75 per cent of the total sales of women's specialty stores, were doing a shoe business of $29,184,000 or nearly twice as much shoe business as that done by women's specialty stores. In both instances the expense rate is practically identical with that of shoe stores.

General merchandise stores sell nearly $50,000,000 of shoes, or about 7 per cent as much as is sold by shoe stores. They operate at an average expense ratio of 20.43, in comparison with the 29.39 ratio of shoe stores. General merchandise stores predominate in cities of less than 30,000 and in places of less than 10,000 population, and in such places the shoe stores have a formidable obstacle to overcome in the difference in expense rate. The same is true in regard to dry-goods stores, whose expense ratio in the smaller places is 21.47 per cent against 25.77 per cent in shoe stores. The total volume of all shoe stores in all places of less than 30,000 population is about $180,000,000, of which shoes are perhaps $160,000,000. The shoe sales of dry-goods stores and general merchandise stores alone, the great majority of which are in such places, appear to total about $77,000,000, or not far from one-half of shoe sales in shoe stores. Adding country general stores, the shoe sales in which are about $115,000,000, it would appear that in places of less than 30,000, or in other words the entire country except the medium-sized and larger cities, the sale of shoes in shoe stores is less than the sale of shoes in other than shoe stores.

CHAPTER 2.—THE SALE OF RELATED COMMODITIES IN SHOE STORES

Just as shoes constitute a related or secondary commodity in nonshoe stores, such as clothing stores and department stores, so may other commodities be sold as related merchandise in shoe stores. By far the most important of such related commodities, in terms of sales, are women's hosiery, men's hose, and men's neckwear, but there are many other commodities that are sold in large quantities in shoe stores.

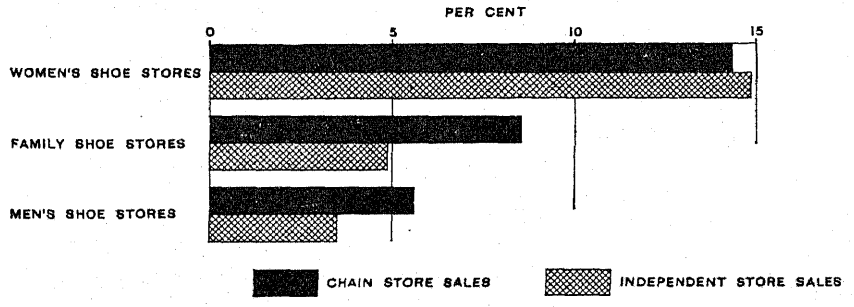
A related commodity is any commodity which is associated, in the customer's mind, with the primary commodity sold by a store and is relatively of less importance and less price than the primary commodity. Shoes are a related commodity when sold with apparel or clothing. Hosiery is a related commodity when sold with shoes.

Related commodities and the retailer.—The retailer is interested in related commodities for the reason that such merchandise sells with less sales effort, and at lower expense, than the primary commodities themselves, and the sale of related commodities tends to bring down the average expense ratio.

Because shoes so often are a related commodity themselves in other stores, when they become the primary commodity of a store it is difficult for the retailer to find other lines which can be merchandised at a profit as related lines. Less than 6 per cent of the total sales of shoe stores are of such commodities, and many shoe stores report no such sales whatever. Evidently the shoe chains have given more attention to the development of related commodities than have the independent stores, as evidenced by the following comparisons:

	Total sales, all commodities	Per cent of related commodities	Approximate sales of other than shoes
Family shoe stores	$614,640,960	6.40	$39,656,500
Chains	265,344,857	8.53	22,633,900
All others	349,296,103	4.87	17,022,600
Women's shoe stores	130,680,659	14.60	19,100,000
Chains	78,294,199	14.39	11,266,500
All others	52,386,460	14.90	7,833,500
Men's shoe stores	61,507,370	4.40	2,686,000
Chains	25,510,704	5.59	1,426,000
All others	35,996,666	3.50	1,260,000

Chart V. – Sales of related commodities other than shoes——Comparison between chains and independents



In any study of related commodities the retailer is particularly interested in (*a*) what other shoe stores are doing with such lines; (*b*) what stores, other than shoe stores, are selling the lines, and hence what is the nature of the competition to be expected; (*c*) what are the expense ratios of the other stores in comparison with shoe stores, and hence what is the probable marking rate of these nonshoe-store competitors; (*d*) what is the total sale of the proposed merchandise in any stated city or territory; and (*e*) how much of it is sold by each kind of store.

The answer to these questions can be found in the several State reports. Table 15 in the State reports contains commodity breakdowns for each kind of store. The table shows what stores sell the commodity, and how much the commodity amounts to in comparison with the total sales of such stores. Table 2 in the State reports contains expense data for each kind of store. Table 1 shows the total sales of each kind of store, and by applying to the total sales of a given kind of store the percentage shown in Table 15, as representative of the sale of a given commodity, the result is a close approximation of the dollar sales of that commodity in the kind of store under review.

Related commodities and the manufacturer or wholesaler.—When it is realized that the sale of women's hosiery alone exceeds $42,000,000 in shoe stores, and that there are other commodity lines which are capable of aggressive promotion in such stores, it is evident that shoe stores offer a present and potential market for many manufacturers and wholesalers not directly interested in the sale of shoes.

As was indicated on the preceding page, independent shoe stores are not developing the sale of related commodities in the same proportion as shoe chains except in the case of women's shoe stores, wherein the sale of hosiery by independents is slightly larger proportionately than is the sale of hosiery by women's shoe chains.

Women's shoe stores as a whole sell more than $14,500,000 of hosiery and another $4,500,000 of service and miscellaneous commodities such as findings. At the time of the census hosiery was almost the only related commodity in women's shoe stores, with hand bags and luggage almost negligible. A study of the same stores to-day would reveal several other related commodities which have been developed since 1929, but which may not be listed here because the data are not officially available to the census.

Men's shoe stores sell more than $1,200,000 of furnishings, consisting mainly of hose and silk neckwear. Other commodities in addition to furnishings are luggage, portfolios, bill folds and other leather goods, umbrellas and canes, golf bags and sticks, shoe-trees, felt slippers, and lounging robes. Chains have increased their sales of such related commodities to 5.6 per cent of their total sales, but independent stores show only 3.5 per cent of such sales. The total sale of related commodities of various kinds, and repair service, in men's shoe stores is about $2,686,000.

Family shoe stores have the best opportunity, as a group, to develop the sale of related commodities because they have a larger number of primary lines with which to attract customer traffic to the stores. Of more than $600,000,000 of sales in 1929, family shoe stores sold more than $39,000,000 of related merchandise, which averaged 6.4 per cent of their total sales. The chains did 8.53 per cent of their business in related lines, while the independents did only 4.87 per cent of their business in such merchandise.

Of the $42,000,000 of women's hosiery sold in shoe stores, about $27,500,000 was sold in family shoe stores. These stores also sold more than $2,000,000 of men's furnishings (mainly hose) and nearly $10,000,000 of other merchandise and service. The latter item includes such lines as hand bags, luggage, purses and leather novelties, umbrellas, felt footwear, bath robes, and sometimes toys. The data officially at the disposal of the bureau are limited to the facts contained in the census questionnaire and preclude any attempt to give a list of all the innumerable commodities which have been developed as related merchandise in family shoe stores. The total, however, exceeds $39,000,000, and hosiery alone is 70 per cent of the total.

CHAPTER 3.—MARKETING SHOES THROUGH RETAILERS

If a shoe manufacturer wanted to contact every shoe-store buyer in the country it would require 18,081 contacts to reach the 24,259 shoe stores and the 500 wholesalers. And this would not include shoe buyers in 4,190 department stores and a greater number of specialty stores.

There are 17,261 independent shoe-store proprietors who buy for their stores either directly from the manufacturer or from near-by wholesalers. The stores for which they buy shoes do a total retail business of $446,906,000, of which about 90 per cent is the sale of shoes. There are 320 chain buyers controlling the shoe purchases for stores with total sales of $369,149,000. There are 500 shoe wholesalers, whose total sales in 1929 amounted to $264,413,000 (at "cost" as far as the retailer is concerned), of which approximately $261,750,000 is footwear. These wholesalers supply many of the smaller independent stores enumerated above, and particularly the myriad of country general stores, general merchandise stores, and other nonshoe stores which sell shoes in competition with, or in addition to, shoe stores. It is impossible to determine how many of the 17,261 independent shoe men are reached through the 500 wholesalers, or how many of them deal directly with one or more shoe factories. In the figures above there are eliminated entirely those stores which are manufacturer controlled and hence not available as outlets for other manufacturers.

Where the buyers are located.—Few if any national distributors would have occasion to contact all shoe buyers, but it may be of value to know the number of potential buyers in any geographic division or combination of divisions in the country.

Nearly one-third are located in the Middle Atlantic division, centering on New York City, in which city alone there are 1,729 buyers. Phialdelphia contains 616 buyer contacts, Pittsburgh 113, and Buffalo 167. One-fourth of all buyers are located in the East North-Central division, centering on Chicago. In Chicago alone there are 687 contacts, Akron 16, Cleveland 203, Columbus 47, Detroit 295, and Milwaukee 153.

Eleven per cent of the buyers are in New England, centering on Boston. Boston contains 287 contacts. Another 11 per cent are in the West North-Central States; St. Louis has 286 and Kansas City at least 45.

The South Atlantic division contains 6 per cent of all buyers, with 165 in Baltimore, 18 in Miami, and 78 in Atlanta. The East South-Central division, composed of the Southern States east of the Mississippi River, contains 2½ per cent of all contacts, with 15 in Birmingham.

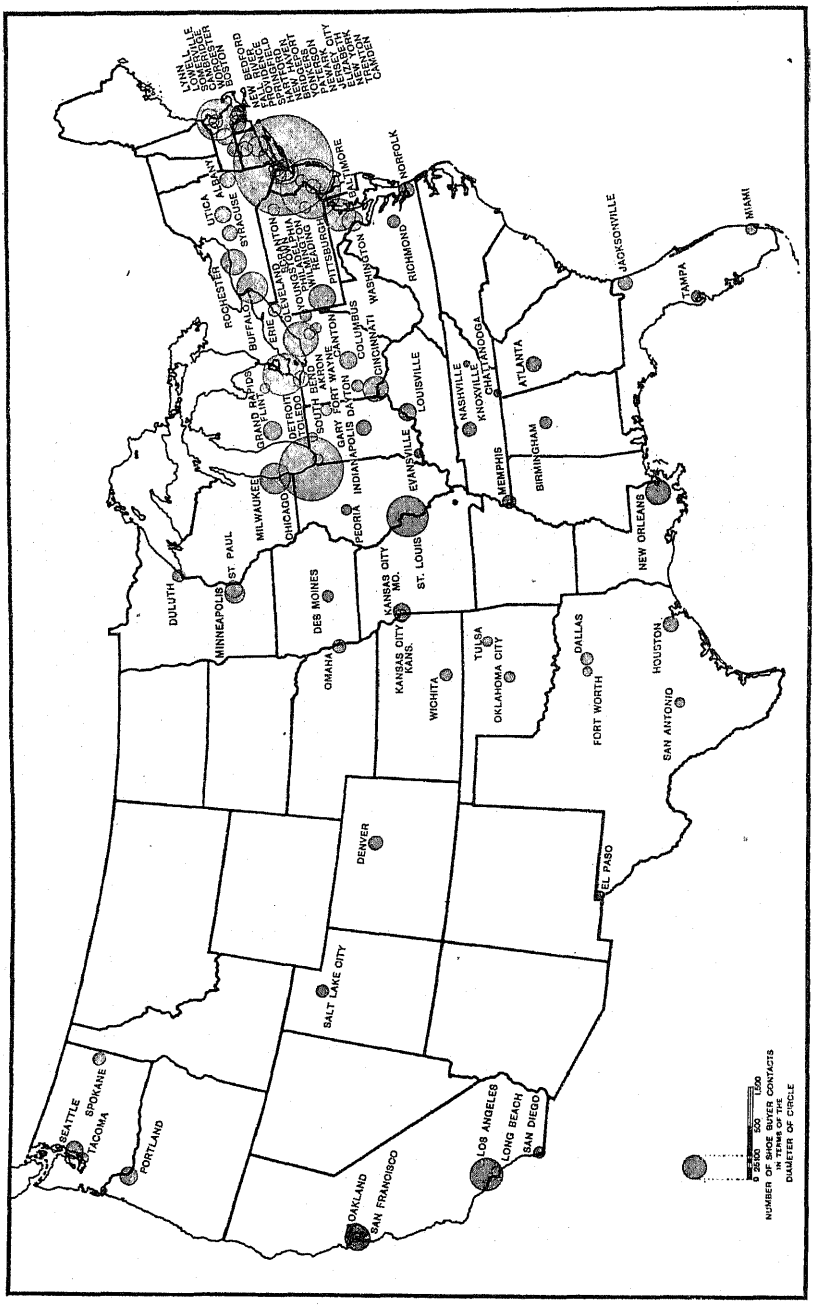
The Southern States west of the Mississippi, composing the West South-Central division, contains 3.8 per cent of all contacts. Dallas contains 21, Houston 33, San Antonio 10, and New Orleans 103.

The Mountain States contain 1.7 per cent of all buyers, with 27 in Denver. The Pacific Coast States contain 7 per cent, of which there are 172 in Los Angeles, 112 in San Francisco, and 87 in Seattle.

The table below shows the number of buyer contacts in each geographic division, and in 26 principal cities. In its preparation all chain stores have been eliminated from each division, and in their place there are shown the number of chain headquarters in each division, and in each of the cities. Only those cities are listed in which there are three or more chains, or in which there is a substan-

CHART VII.—NUMBER OF SHOE-BUYER CONTACTS IN PRINCIPAL CITIES.

(See page 28)



tial volume of purchases by chains or wholesalers. In a few cases the sales figures are omitted to avoid disclosure of individual operations, but the amounts omitted are susbstantial or the cities would not have been listed. In some of the cities the number of shoe wholesalers is not disclosed by the Wholesale Census and therefore could not be used in this table. The fact that none are reported does not indicate necessarily that there are no wholesale shoe houses in those cities.

Retail Store Buyers—Shoes

[Shoe stores, shoe chains, and shoe wholesalers] [1]

Divisions and cities	Single-store independents		Independent contacts for 2 to 3 stores		Chain-store contacts (central offices)		Wholesale contacts (wholesale merchants)		Total buyer contacts	Per cent of total contacts
	Stores	Sales	Contacts	Sales	Contacts	Sales	Stores	Sales		
United States, total	16,393	[2] $358,103	868	[2] $88,803	320	[2] $369,149	500	[2] $264,413	18,081	100.00
New England	1,710	34,187	90	7,580	39	58,529	121	43,973	1,960	10.84
Boston, Mass	180	4,570	13	1,347	11	17,994	83	35,394	287	-------
Brockton, Mass	24	432	------	--------	3	16,909	(3)	---------	27	-------
Middle Atlantic	5,194	110,779	294	29,072	89	163,907	173	62,772	5,750	31.80
New York, N. Y	1,476	35,129	109	12,576	50	131,918	94	45,978	1,729	-------
Philadelphia, Pa	535	8,838	29	2,012	11	4,986	41	8,479	616	-------
Buffalo, N. Y	146	2,712	14	1,301	4	1,986	3	177	167	-------
Pittsburgh, Pa	92	3,616	9	1,493	3	2,986	9	2,071	113	-------
East North Central	4,255	93,294	193	15,848	90	72,207	61	25,409	4,599	25.43
Chicago, Ill	590	12,673	49	3,538	24	29,487	24	13,298	687	-------
Akron, Ohio	10	492	1	(x)	5	4,903	(3)	---------	16	-------
Cleveland, Ohio	167	2,875	18	1,847	13	5,076	5	1,045	203	-------
Columbus, Ohio	41	1,346	1	(x)	5	18,048	(3)	---------	47	-------
Detroit, Mich	259	8,268	26	2,276	5	793	5	1,012	295	-------
Milwaukee, Wis	138	3,034	9	715	3	2,623	3	506	153	-------
West North Central	1,886	35,145	51	5,916	28	22,129	49	98,798	2,014	11.14
St. Louis, Mo	229	3,850	9	1,236	11	16,887	37	95,507	286	-------
Kansas City, Mo	36	794	6	607	3	931	(3)	---------	45	-------
South Atlantic	967	25,342	68	6,948	17	17,922	36	14,908	1,088	6.02
Baltimore, Md	134	2,911	14	1,261	4	11,823	13	6,257	165	-------
Atlanta, Ga	64	4,405	10	777	1	(x)	3	1,160	78	-------
Miami, Fla	12	260	2	(x)	4	1,196	(3)	---------	18	-------
East South Central	389	10,742	23	2,514	5	1,464	11	5,315	428	2.37
Birmingham, Ala	8	193	3	420	4	1,227	(3)	---------	15	-------
West South Central	606	17,002	29	4,664	18	7,011	19	6,857	672	3.72
New Orleans, La	95	2,573	2	(x)	1	(x)	5	2,619	103	-------
Dallas, Tex	8	1,292	1	(x)	3	1,644	9	3,528	21	-------
Houston, Tex	30	527	1	(x)	2	(x)	(3)	---------	33	-------
San Antonio, Tex	5	825	3	125	2	(x)	(3)	---------	10	-------
Mountain	272	7,282	20	2,462	3	580	6	812	301	1.66
Denver, Colo	18	575	2	(x)	3	(x)	4	423	27	-------
Pacific	1,114	24,330	100	13,799	31	25,400	24	5,569	1,269	7.02
Los Angeles, Calif	126	2,900	19	3,257	14	15,968	13	4,194	172	-------
San Francisco, Calif	93	1,849	9	2,420	6	5,594	4	785	112	-------
Seattle, Wash	77	4,334	6	1,404	3	1,697	1	(x)	87	-------

[1] Does not include department stores, apparel stores, or other nonshoe stores which also sell shoes. See State reports for the number of any desired kind of stores in any State or city.
[2] Sales are expressed in thousands of dollars. They are total sales, not merely shoe sales.
[3] Not reported.
(x) Can not disclose amount.

The table is in agreement with the other tables in this report except that it does not contain 375 manufacturer-controlled contacts with about $30,000,000 of sales, and the 1,925 multiunit independents are reduced to their 868 buyer contacts. It does not take into consideration the shoe buyers in department stores, women's specialty stores, and clothing stores. Practically all department

stores sell shoes, but the number of apparel and other stores which sell shoes is not known.

Map showing shoe outlets.—On page 25 is a map of the United States showing graphically, by means of spots of varying size, the relative number of buyers of shoes in each of the cities of 100,000 and over, in shoe stores and department stores. Below is a list of the cities shown on the map, together with the number of buyer contacts in each such city. Comparatively few shoe wholesalers (500 in the entire United States) have been added in all cities for which wholesale reports are available.

SHOE BUYER CONTACTS, IN ALL CITIES OF MORE THAN 100,000 POPULATION

(See map on page 26)

CITIES	Total	CITIES	Total
New York, N. Y	[1] 1,789	New Haven, Conn	66
Chicago, Ill	[1] 742	Flint, Mich	19
Philadelphia, Pa	[1] 629	Nashville, Tenn	33
Detroit, Mich	[1] 313	Springfield, Mass	34
Los Angeles, Calif	[1] 188	San Diego, Calif	24
Cleveland, Ohio	[1] 214	Bridgeport, Conn	33
St. Louis, Mo	[1] 294	Scranton, Pa	22
Baltimore, Md	[1] 180	Des Moines, Iowa	23
Boston, Mass	[1] 299	Long Beach, Calif	18
Pittsburgh, Pa	[1] 123	Tulsa, Okla	16
San Francisco, Calif	[1] 118	Salt Lake City, Utah	27
Milwaukee, Wis	[1] 162	Paterson, N. J	39
Buffalo, N. Y	[1] 179	Yonkers, N. Y	36
Washington, D. C	72	Norfolk, Va	39
Minneapolis, Minn	74	Jacksonville, Fla	34
New Orleans, La	[1] 110	Albany, N. Y	40
Cincinnati, Ohio	115	Trenton, N. J	26
Newark, N. J	109	Kansas City, Kans	29
Kansas City, Mo	51	Chattanooga, Tenn	11
Seattle, Wash	[1] 57	Camden, N. J	33
Indianapolis, Ind	42	Erie, Pa	29
Rochester, N. Y	118	Spokane, Wash	27
Jersey City, N. J	77	Fall River, Mass	25
Louisville, Ky	51	Fort Wayne, Ind	22
Portland, Oreg	59	Elizabeth, N. J	38
Houston, Tex	39	Cambridge, Mass	31
Toledo, Ohio	44	New Bedford, Mass	36
Columbus, Ohio	52	Reading, Pa	24
Denver, Colo	[1] 34	Wichita, Kans	23
Oakland, Calif	62	Miami, Fla	20
St. Paul, Minn	52	Tacoma, Wash	21
Atlanta, Ga	[1] 42	Wilmington, Del	20
Dallas, Tex	[1] 28	Knoxville, Tenn	7
Birmingham, Ala	25	Peoria, Ill	18
Akron, Ohio	20	Canton, Ohio	16
Memphis, Tenn	32	South Bend, Ind	13
Providence, R. I	48	Somerville, Mass	17
San Antonio, Tex	15	El Paso, Tex	16
Omaha, Nebr	31	Lynn, Mass	44
Syracuse, N. Y	41	Evansville, Ind	14
Dayton, Ohio	26	Utica, N. Y	45
Worcester, Mass	46	Duluth, Minn	25
Oklahoma City, Okla	21	Tampa, Fla	23
Richmond, Va	27	Gary, Ind	15
Youngstown, Ohio	25	Lowell, Mass	23
Grand Rapids, Mich	63		
Hartford, Conn	36	Total	8,185
Fort Worth, Tex	17		

[1] Includes shoe wholesalers.

Department stores.—The following table shows the number of department stores in each State and the approximate value of shoes sold by them. Similar data for other kinds of stores are contained in the several State reports.

DEPARTMENT STORES—TOTAL SALES AND SHOE SALES

	Number of department stores	Total sales of department stores	Shoe sales by department stores
UNITED STATES, total	4,190	$3,903,073,897	$208,296,184
NEW ENGLAND	226	305,455,373	13,584,928
Connecticut	52	49,883,282	2,357,418
Maine	15	9,709,328	213,605
Massachusetts	104	207,237,055	9,701,333
New Hampshire	18	4,178,269	182,398
Rhode Island	20	30,425,483	1,064,892
Vermont	17	4,021,956	65,282
MIDDLE ATLANTIC	571	1,119,244,236	55,122,072
New Jersey	83	112,406,266	5,411,773
New York	229	608,698,678	29,057,073
Pennsylvania	259	398,139,292	20,653,226
EAST NORTH CENTRAL	1,014	1,024,755,149	49,588,253
Illinois	263	365,237,602	20,164,610
Indiana	176	91,569,249	4,038,013
Michigan	179	192,875,068	10,481,566
Ohio	253	281,044,604	11,099,421
Wisconsin	143	94,028,626	3,804,643
WEST NORTH CENTRAL	535	335,812,199	18,361,491
Iowa	114	56,229,476	2,603,454
Kansas	95	30,517,376	1,828,533
Minnesota	101	79,917,740	4,343,030
Missouri	93	116,608,744	6,057,137
Nebraska	60	31,972,461	1,918,348
North Dakota	39	11,691,541	989,396
South Dakota	33	8,874,861	621,593
SOUTH ATLANTIC	458	272,518,093	18,433,506
Delaware	7	3,053,884	305,389
District of Columbia	10	45,937,655	1,975,320
Florida	31	21,721,564	1,670,756
Georgia	61	34,884,064	2,849,048
Maryland	46	61,257,896	3,614,217
North Carolina	133	36,554,459	3,710,906
South Carolina	47	11,044,646	1,249,447
Virginia	69	35,344,049	1,519,794
West Virginia	54	22,719,936	1,538,629
EAST SOUTH CENTRAL	216	107,297,327	8,094,807
Alabama	59	27,479,270	1,868,591
Kentucky	58	25,202,307	1,155,295
Mississippi	50	13,994,348	1,035,581
Tennessee	49	40,621,402	4,035,340
WEST SOUTH CENTRAL	452	205,285,992	13,806,710
Arkansas	42	16,193,544	1,127,945
Louisiana	45	33,287,737	1,616,600
Oklahoma	112	40,317,514	2,738,812
Texas	253	115,487,197	8,323,353
MOUNTAIN	283	127,733,602	9,753,449
Arizona	38	17,483,256	1,641,695
Colorado	60	49,910,743	3,778,391
Idaho	56	15,142,919	1,438,757
Montana	41	14,316,188	895,131
Nevada	9	2,720,107	146,886
New Mexico	19	4,485,182	247,508
Utah	42	20,072,680	1,391,581
Wyoming	18	3,602,527	213,500
PACIFIC	435	404,971,926	21,550,968
California	256	278,247,486	13,117,212
Oregon	65	52,780,258	3,493,465
Washington	114	73,944,182	4,940,291

The total retail value of shoes and other footwear sold by all kinds of stores throughout the country can be determined by computing from the State reports the amount sold in each State, by each of the various kinds of stores. This computation shows a total of $1,265,011,685. By States, the sales of shoes are shown in the table following:

Retail Sales—Shoes and Other Footwear, by States

[See also Table 8]

	Total sales of shoes and other footwear	Sale of shoes and other footwear in shoe stores		Sales of shoes and other footwear in all other stores	
	Amount	Amount	Per cent	Amount	Per cent
United States, total	$1,265,011,685	$733,836,800	58.0	$531,174,885	42.0
New England	87,213,830	63,067,795	72.3	24,146,035	27.7
Connecticut	17,106,052	12,547,793	73.4	4,558,259	26.8
Maine	6,961,833	4,907,164	70.5	2,054,669	29.5
Massachusetts	47,972,003	34,776,468	72.5	13,195,535	27.5
New Hampshire	4,221,092	2,860,101	67.8	1,360,991	32.2
Rhode Island	7,371,338	5,968,819	81.0	1,402,519	19.0
Vermont	3,581,512	2,007,450	56.1	1,574,062	43.9
Middle Atlantic	328,391,385	231,124,066	70.4	97,267,319	29.6
New Jersey	42,111,933	32,806,606	77.9	9,305,327	22.1
New York	175,062,572	126,675,963	72.4	48,386,609	27.6
Pennsylvania	111,216,880	71,641,497	64.4	39,575,383	35.6
East North Central	293,945,618	186,882,853	63.6	107,062,765	36.4
Illinois	105,385,699	58,419,627	55.4	46,966,072	44.6
Indiana	30,249,868	19,672,000	65.0	10,577,868	35.0
Michigan	54,816,250	36,785,986	67.1	18,030,264	32.9
Ohio	74,560,633	53,205,438	71.4	21,355,195	28.6
Wisconsin	28,933,168	18,799,802	65.0	10,133,366	35.0
West North Central	124,335,309	57,994,260	46.6	66,341,049	53.4
Iowa	21,096,277	12,990,732	61.6	8,105,545	38.4
Kansas	14,239,899	6,557,213	46.0	7,682,686	54.0
Minnesota	28,113,074	11,980,696	42.6	16,132,378	57.4
Missouri	39,707,483	18,435,848	46.4	21,271,635	53.6
Nebraska	11,772,047	5,102,051	43.3	6,669,996	56.7
North Dakota	4,520,822	1,147,964	25.4	3,372,858	74.6
South Dakota	4,885,707	1,779,756	36.4	3,105,951	63.6
South Atlantic	121,459,701	53,192,886	43.8	68,266,815	56.2
Delaware	2,348,216	1,555,106	66.2	793,110	33.8
District of Columbia	9,454,520	6,876,735	72.7	2,577,785	27.3
Florida	12,531,338	6,276,105	50.1	6,255,233	49.9
Georgia	20,217,368	8,233,098	40.7	11,984,270	59.3
Maryland	15,944,634	8,122,068	50.9	7,822,566	49.1
North Carolina	22,225,491	6,202,904	27.9	16,022,587	72.1
South Carolina	9,215,797	2,879,073	31.2	6,336,724	68.8
Virginia	15,840,148	7,857,234	49.6	7,982,914	50.4
West Virginia	13,682,189	5,190,563	37.9	8,491,626	62.1
East South Central	68,238,441	22,831,523	33.5	45,406,918	66.5
Alabama	17,124,439	5,691,359	33.2	11,433,080	66.8
Kentucky	16,663,899	6,950,725	41.7	9,713,174	58.3
Mississippi	14,312,411	2,141,269	15.0	12,171,142	85.0
Tennessee	20,137,692	8,048,170	40.0	12,089,522	60.0
West South Central	97,288,502	35,389,818	36.4	61,898,684	63.6
Arkansas	10,745,837	2,383,008	22.2	8,362,829	77.8
Louisiana	14,912,640	7,546,193	50.6	7,366,447	49.4
Oklahoma	19,329,076	6,330,234	32.7	12,998,842	67.3
Texas	52,300,949	19,130,383	36.6	33,170,566	63.4
Mountain	35,084,479	11,827,433	33.7	23,257,046	66.3
Arizona	4,233,706	972,301	23.0	3,261,405	77.0
Colorado	11,240,051	4,405,047	39.2	6,835,004	60.8
Idaho	3,750,257	796,985	21.3	2,953,272	78.7
Montana	5,459,766	1,861,201	34.1	3,598,565	65.9
Nevada	949,290	431,651	45.5	517,639	54.5
New Mexico	2,433,625	329,311	13.5	2,104,314	86.5
Utah	5,020,946	2,050,588	40.8	2,970,358	59.2
Wyoming	1,996,838	980,349	49.1	1,016,489	50.9
Pacific	102,487,311	64,959,057	63.4	37,528,254	36.6
California	74,467,120	51,931,364	69.7	22,535,756	30.3
Oregon	10,506,616	4,354,248	41.4	6,152,368	58.6
Washington	17,513,575	8,673,445	49.5	8,840,130	50.5
Additional shoe sales by shoe chains	6,567,109	6,567,109			

Where shoes are sold.—Of the total volume of retail show sales, 58 per cent is sold in shoe stores, 18.7 per cent in dry-goods and department stores, 1.2 per cent in women's specialty stores, 2.5 per cent in men's stores, and 2.5 per cent in family clothing stores. The balance is sold in various other kinds of stores.

Of the total of *shoe* sales in shoe stores, 8.2 per cent is sold in men's shoe stores, 13.6 per cent in women's shoe stores, and the remaining 78.2 per cent in family shoe stores. In dollars, the figures are:

	Value	Per cent
Total retail value of shoes sold in men's shoe stores	$58, 821, 293	8. 2
Total retail value of shoes sold in women's shoe stores	100, 031, 045	13. 6
Total retail value of shoes sold in family shoe stores	574, 984, 462	78. 2
Total	733, 836, 800	100. 0

Men's and boys' shoes constitute 36 per cent of the total of shoe sales in all shoe stores, women's and children's shoes constitute 58.4 per cent, and infants' shoes and all other footwear constitute the remaining 5.6 per cent. In dollars, the figures are:

	Value	Per cent
Total sales of men's and boys' shoes in all shoe stores	$264, 576, 513	36. 0
Total sales of women's and children's shoes in shoe stores	428, 363, 374	58. 4
Total sales of other footwear, including rubber and infants' footwear	40, 896, 913	5. 6
Total	733, 836, 800	100. 0

It is not possible to compute the sale of men's shoes separately from women's and children's shoes in other kinds of stores with the same degree of assurance. As an example, country general stores are large distributors of shoes (approximately 9.1 per cent of all shoes are sold by such stores), but few of them keep commodity-sales records. Very little data are available to show the nature and relative volume of the commodities sold in country general stores. An analysis of all of the reports showing commodity sales, covering 424 stores in the $100,000 class (if that limited number of stores in that class are indicative of the situation in the smaller and perhaps more typical country general stores), would indicate that shoes constitute 4.4 to 5.2 per cent of the total sales of such stores. Applied to the total sales of country stores, shoe sales appear to total $115,427,000. There is even less data, however, to indicate how this total is divided between men's shoes, women's shoes, and other classes.

Sales by classes of shoes.—In the case of other kinds of stores which also sell shoes the breakdown between shoe classes can be computed from reasonably representative data in the State reports. If it may be assumed, for the purpose of arriving at national totals, that the $115,427,000 of shoe sales in country general stores is divided between men's and women's shoes in the same proportion that is found in shoe stores, then Table 8 may be accepted as a close estimate of the total sales of shoes throughout the country, in all kinds of retail stores. The totals are:

	Value	Per cent
Men's, boys', and youths' shoes	$439, 732, 255	34. 8
Women's, misses', and children's shoes	748, 870, 786	59. 2
Rubber and other footwear, including infants' shoes	76, 408, 644	6. 0
Total	1, 265, 011, 685	100. 0

It will be seen from Table 8 that the manufacturer seeking national distribution is limited by no means to shoe stores, which sell only 58 per cent of the total. He may elect to sell mainly through department stores or clothing stores, or mainly through general stores and still find enough such outlets, with enough present shoe volume, to justify their development as his market. Or he may

want to enlarge the field covered by his salesmen to include some one of more kinds of stores shown in Table 8 which are not primarily shoe stores. For the purpose of sales planning, there is available in the State reports the necessary information as to such retailers in any State, county, city, or town.

Expense ratios affect sales.—The manufacturer or wholesaler who is studying the various kinds of stores, with a view to their desirability as outlets, will find in the State reports the data he requires as to the number of such stores and their sales, their cost of doing business, their standing in comparison with other kinds of stores, the proportion of cash and credit business, a classification of the stores by size, and a breakdown of their sales by commodities.

Most important, however, is the cost of doing business, for the mark-up required by the retailer is influenced directly by the expense rate. In another section of this report it is pointed out that the expense ratio of shoe stores is higher than the ratio of most of the other kinds of business which compete with shoe stores in the sale of shoes. Reference should be made to the table on page 22. It will be noted that the size of the city affects the expense ratio. It will be noted also that the difference between the shoe-store ratio and the ratio in other kinds of stores varies. In places of less than 10,000, even though all expenses are proportionately lower, shoe stores still have a higher expense ratio, which must be provided in the mark-up, than any of their seven principal competitors, and much higher than that of country general stores.

Other store outlets important.—It is evident (p. 11) that something less than one-half of the shoe business in places of less than 10,000 population is done by shoe stores. A consideration that sometimes is of equal importance with expense, as the cause of that situation, is the importance in retailing of accessibility or convenience of location. Shoes are both a prime commodity and a costume accessory. Work shoes, for instance, are bought with no other consideration than their utility and price. There are some grades of women's shoes, also, that are strictly utility shoes, bought as such. But the majority of women's shoes, and a large proportion of men's shoes, are bought as a part of an ensemble, or at least they are bought in association with apparel or clothing. For that reason there is an increasing proportion of shoes sold in department stores and men's clothing stores, and in the smaller cities there is a tendency to add shoes to the commodity lines carried in women's apparel stores.

Shoes are too specialized a commodity to make the operation of many separate shoe stores practicable in the smaller communities. Since only about one-half of the shoes sold in such communities are sold in shoe stores, it is evident that planned shoe distribution must take into account the size of the community in selecting the kind of store desired as an outlet. In the smaller communities it is evident that department stores, family clothing stores, and country general stores become just as important aggregate distributors of shoes as are the shoe stores. In extreme contrast, perhaps more than two-thirds of the shoes sold in large cities are sold in specialized shoe stores.

In the smaller communities, and to a large extent in the larger cities, convenience of location—ready accessibility—accounts for much of the sale of shoes in other than shoe stores. If a customer enters a store for a dress, for instance, it is easier and cheaper to sell her shoes than it is to attract a customer to a shoe store expressly for the purpose of buying shoes. In most cases related commodities sell with less sales effort and with lower operating expense than the same commodities can be sold when they constitute the principal commodities of a store. The purpose of these observations is to emphasize that shoes constitute a class of commodity that may be sold readily as a related commodity, and that the shoe distributor should keep in mind the desirability of developing non-shoe-store outlets if he determines, from his investigations, that the trend is toward an increasing proportion of shoe sales in nonshoe stores.

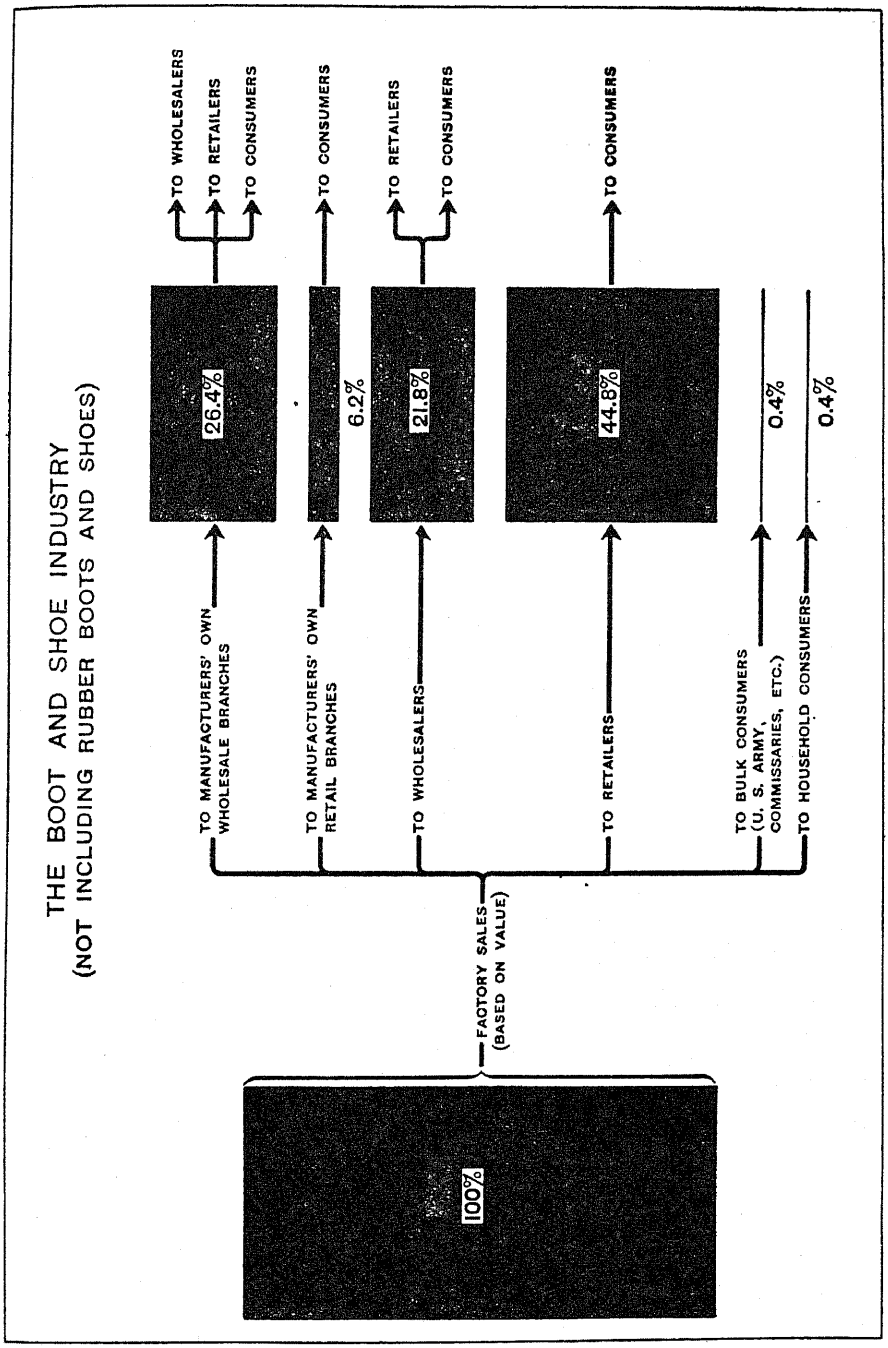

THE BOOT AND SHOE INDUSTRY
(NOT INCLUDING RUBBER BOOTS AND SHOES)
FACTORY SALES
(BASED ON VALUE)
100%
TO MANUFACTURERS' OWN WHOLESALE BRANCHES
TO MANUFACTURERS' OWN RETAIL BRANCHES
TO WHOLESALERS
TO RETAILERS
TO BULK CONSUMERS (U. S. ARMY, COMMISSARIES, ETC.)
TO HOUSEHOLD CONSUMERS
26.4%
6.2%
21.8%
44.8%
0.4%
0.4%
TO WHOLESALERS
TO RETAILERS
TO CONSUMERS
TO CONSUMERS
TO RETAILERS
TO CONSUMERS

TABLE 1.—SHOE STORES AND SALES BY STATES AND GEOGRAPHIC DIVISIONS, AND BY SIZE OF CITY

DIVISION AND STATE	TOTAL			CITIES OVER 30,000 POPULATION		
	Stores	Total store sales		Stores	Sales	
		Amount	Per cent		Amount	Per cent
UNITED STATES, total	24,259	$806,828,989	100.00	15,039	$626,818,382	77.69
NEW ENGLAND	2,346	66,107,876	8.19	1,381	48,227,713	72.95
Connecticut	451	13,226,237	1.64	275	9,493,426	71.78
Maine	216	5,136,606	.64	42	1,842,407	35.87
Massachusetts	1,306	36,387,745	4.51	902	30,073,538	82.65
New Hampshire	139	2,875,625	.35	48	1,183,894	41.17
Rhode Island	170	6,491,911	.80	114	5,634,448	86.79
Vermont	64	1,989,752	.25	----------	(1)	----------
MIDDLE ATLANTIC	7,709	277,754,724	34.42	5,516	231,833,543	83.47
New Jersey	1,143	33,549,801	4.16	759	27,079,123	80.71
New York	4,156	168,080,429	20.83	3,363	151,197,872	89.96
Pennsylvania	2,410	76,124,494	9.43	1,394	53,556,548	70.36
EAST NORTH CENTRAL	6,401	199,390,672	24.71	3,917	153,773,690	77.12
Illinois	1,967	65,795,820	8.15	1,372	55,244,668	83.97
Indiana	677	20,350,135	2.52	304	13,167,076	64.70
Michigan	1,254	38,231,606	4.74	823	30,761,519	80.46
Ohio	1,702	55,253,108	6.85	1,033	41,863,257	75.77
Wisconsin	801	19,760,003	2.45	385	12,737,170	64.46
WEST NORTH CENTRAL	2,455	61,530,834	7.63	999	35,583,574	57.83
Iowa	569	13,431,207	1.67	157	5,547,128	41.30
Kansas	297	6,965,126	.86	80	2,481,395	35.63
Minnesota	477	12,401,161	1.54	208	8,208,594	66.19
Missouri	721	20,401,492	2.53	466	16,077,317	78.80
Nebraska	228	5,345,933	.66	74	2,788,762	52.17
North Dakota	71	1,165,718	.14	----------	(1)	----------
South Dakota	92	1,820,197	.23	14	480,378	26.39
SOUTH ATLANTIC	1,590	56,369,523	6.99	1,045	44,289,598	78.57
Delaware	39	1,611,098	.20	34	1,508,059	93.60
District of Columbia	123	7,468,119	.93	123	7,468,119	100.00
Florida	244	6,468,771	.80	141	4,556,422	70.44
Georgia	214	8,631,291	1.07	147	7,277,161	84.31
Maryland	282	8,888,445	1.10	243	8,330,280	93.72
North Carolina	206	6,430,320	.80	110	4,311,877	67.06
South Carolina	97	3,010,580	.37	34	1,199,148	39.83
Virginia	231	8,544,427	1.06	149	6,579,581	77.00
West Virginia	154	5,316,472	.66	64	3,058,951	57.54
EAST SOUTH CENTRAL	631	24,070,521	2.98	367	17,964,575	74.63
Alabama	147	5,982,756	.74	93	4,639,650	77.55
Kentucky	224	7,305,067	.90	129	5,491,033	75.17
Mississippi	77	2,260,247	.28	16	675,435	29.88
Tennessee	183	8,522,451	1.06	129	7,158,457	84.00
WEST SOUTH CENTRAL	992	38,974,454	4.83	555	30,441,452	78.11
Arkansas	87	2,573,656	.32	20	1,203,684	46.77
Louisiana	232	8,149,403	1.01	182	7,262,241	89.12
Oklahoma	190	6,957,560	.86	61	4,202,810	60.41
Texas	483	21,293,835	2.64	292	17,772,717	83.46
MOUNTAIN	370	12,457,622	1.55	138	7,168,190	57.54
Arizona	32	1,045,115	.13	15	603,526	57.75
Colorado	136	5,009,978	.62	74	3,809,562	76.04
Idaho	32	800,467	.10	----------	(1)	----------
Montana	57	2,038,469	.25	12	769,875	37.77
Nevada	11	435,571	.06	----------	(1)	----------
New Mexico	20	354,074	.04	----------	(1)	----------
Utah	56	2,255,772	.28	37	1,985,227	88.01
Wyoming	26	518,176	.07	----------	(1)	----------
PACIFIC	1,765	70,172,763	8.70	1,121	57,536,047	81.99
California	1,324	55,921,575	6.93	879	47,126,243	84.27
Oregon	163	4,763,864	.59	79	3,176,208	66.67
Washington	278	9,487,324	1.18	163	7,233,506	76.24

[1] No city of this size in this State.

TABLE 1.—SHOE STORES AND SALES BY STATES AND GEOGRAPHIC DIVISIONS, AND BY SIZE OF CITY—Continued

DIVISION AND STATE	CITIES 10,000 TO 30,000 POPULATION			PLACES UNDER 10,000 POPULATION		
	Stores	Sales		Stores	Sales	
		Amount	Per cent		Amount	Per cent
UNITED STATES, total	3,634	$101,448,355	12.57	5,586	$78,562,252	9.74
NEW ENGLAND	529	11,271,915	17.05	436	6,608,248	10.00
Connecticut	93	2,587,394	19.56	83	1,145,417	8.66
Maine	60	1,523,215	29.65	114	1,770,984	34.48
Massachusetts	257	4,545,161	12.49	147	1,769,046	4.86
New Hampshire	49	1,142,247	39.72	42	549,484	19.11
Rhode Island	47	713,782	11.00	9	143,681	2.21
Vermont	23	760,116	38.20	41	1,229,636	61.80
MIDDLE ATLANTIC	983	28,483,144	10.25	1,210	17,438,037	6.28
New Jersey	170	3,987,385	11.89	214	2,483,293	7.40
New York	332	10,135,980	6.03	461	6,746,577	4.01
Pennsylvania	481	14,359,779	18.86	535	8,208,167	10.78
EAST NORTH CENTRAL	839	22,685,252	11.37	1,645	22,931,730	11.51
Illinois	208	5,395,365	8.20	387	5,155,787	7.83
Indiana	153	3,854,221	18.94	220	3,328,835	16.36
Michigan	135	3,376,526	8.83	296	4,093,561	10.71
Ohio	230	6,717,108	12.16	439	6,672,743	12.07
Wisconsin	113	3,342,032	16.91	303	3,680,801	18.63
WEST NORTH CENTRAL	399	11,693,192	19.00	1,057	14,254,068	23.17
Iowa	113	3,289,363	24.49	299	4,594,716	34.21
Kansas	89	2,706,000	38.85	128	1,777,731	25.52
Minnesota	63	1,725,986	13.92	206	2,466,581	19.89
Missouri	59	1,580,880	7.75	196	2,743,295	13.45
Nebraska	32	862,473	16.13	122	1,694,698	31.70
North Dakota	22	756,863	64.93	49	408,855	35.07
South Dakota	21	771,627	42.39	57	568,192	31.22
SOUTH ATLANTIC	269	8,277,399	14.68	276	3,802,526	6.75
Delaware		(1)		5	103,039	6.40
District of Columbia		(2)			(2)	
Florida	46	1,277,461	19.75	57	634,888	9.81
Georgia	37	972,795	11.27	30	381,335	4.42
Maryland	15	321,948	3.62	24	236,217	2.66
North Carolina	35	1,070,774	16.65	61	1,047,669	16.29
South Carolina	43	1,566,050	52.02	20	245,382	8.15
Virginia	44	1,416,651	16.58	38	548,195	6.42
West Virginia	49	1,651,720	31.07	41	605,801	11.39
EAST SOUTH CENTRAL	119	3,980,224	16.54	145	2,125,722	8.83
Alabama	34	1,169,130	19.54	20	173,976	2.91
Kentucky	34	1,025,483	14.04	61	788,551	10.79
Mississippi	36	1,218,444	53.91	25	366,368	16.21
Tennessee	15	567,167	6.65	39	796,827	9.35
WEST SOUTH CENTRAL	168	5,284,522	13.56	249	3,248,480	8.33
Arkansas	25	904,878	35.16	42	465,094	18.07
Louisiana	14	531,701	6.52	36	355,461	4.36
Oklahoma	60	1,768,301	25.41	69	986,449	14.18
Texas	89	2,079,642	9.77	102	1,441,476	6.77
MOUNTAIN	79	2,886,850	23.17	153	2,402,582	19.29
Arizona		(1)		17	441,589	42.25
Colorado	21	680,659	13.59	41	519,757	10.37
Idaho	8	239,587	29.93	24	560,880	70.07
Montana	23	975,918	47.87	22	292,676	14.36
Nevada	6	371,671	85.33	5	63,900	14.67
New Mexico	11	304,377	85.96	9	49,697	14.04
Utah	3	44,015	1.95	16	226,530	10.04
Wyoming	7	270,623	52.23	19	247,553	47.77
PACIFIC	229	6,885,857	9.81	415	5,750,859	8.20
California	161	4,543,462	8.13	284	4,251,870	7.60
Oregon	25	856,997	17.99	59	730,599	15.34
Washington	43	1,485,398	15.66	72	768,420	8.10

[1] No city of this size in this State.
[2] The District of Columbia and the city of Washington are coextensive.

Sales shown above are total sales, not merely shoe sales.

TABLE 2.—SHOE STORES CLASSIFIED BY SIZE OF BUSINESS

[Sales expressed in thousands of dollars]

	Totals, all shoe stores	SHOE STORES		
		Men's	Women's	Family
UNITED STATES total:				
Number of stores	24,259	1,402	1,666	21,191
Per cent of stores	100.00	100.00	100.00	100.00
Net sales	$806,829	$61,507	$130,681	$614,641
Per cent of sales	100.00	100.00	100.00	100.00
Stores with annual sales of:				
$500,000 and over—				
Number of stores	65	----------	24	41
Per cent of stores	0.27	----------	1.44	0.19
Net sales	$50,637	----------	$18,505	$32,132
Per cent of sales	6.28	----------	14.16	5.23
$300,000 to $499,999—				
Number of stores	122	10	39	73
Per cent of stores	0.50	.71	2.34	0.35
Net sales	$45,833	$3,605	$15,289	$26,939
Per cent of sales	5.68	5.86	11.70	4.38
$200,000 to $299,999—				
Number of stores	192	7	63	122
Per cent of stores	0.79	5.50	3.78	0.58
Net sales	$45,622	$1,594	$15,204	$28,824
Per cent of sales	5.65	2.59	11.64	4.69
$100,000 to $199,999—				
Number of stores	930	81	238	611
Per cent of stores	3.83	5.78	14.28	2.88
Net sales	$125,809	$10,778	$33,046	$81,985
Per cent of sales	15.59	17.52	25.29	13.34
$50,000 to $99,999—				
Number of stores	2,898	357	384	2,157
Per cent of stores	11.95	25.46	23.05	10.18
Net sales	$196,712	$24,403	$27,405	$144,904
Per cent of sales	24.38	39.68	20.97	23.58
$30,000 to $49,999—				
Number of stores	3,746	324	305	3,117
Per cent of stores	15.44	23.11	18.31	14.71
Net sales	$143,918	$12,766	$11,730	$119,422
Per cent of sales	17.84	20.75	8.98	19.43
$20,000 to $29,999—				
Number of stores	3,560	176	213	3,171
Per cent of stores	14.68	12.55	12.79	14.96
Net sales	$86,727	$4,459	$5,297	$76,971
Per cent of sales	10.75	7.25	4.05	12.52
$10,000 to $19,999—				
Number of stores	5,275	182	223	4,870
Per cent of stores	21.74	12.98	13.39	22.98
Net sales	$76,585	$2,642	$3,279	$70,664
Per cent of sales	9.49	4.29	2.51	11.50
$5,000 to $9,999—				
Number of stores	3,364	119	90	3,155
Per cent of stores	13.87	8.49	5.40	14.89
Net sales	$24,154	$874	$657	$22,623
Per cent of sales	3.00	1.42	0.50	3.68
Less than $5,000—				
Number of stores	4,107	146	87	3,874
Per cent of stores	16.93	10.42	5.22	18.28
Net sales	$10,826	$393	$263	$10,170
Per cent of sales	1.34	0.64	0.20	1.65

TABLE 3A.—CREDIT SALES IN EACH KIND OF SHOE STORE

	ALL SHOE STORES		MEN'S STORES		WOMEN'S STORES		FAMILY STORES	
	United States total (stores which could be classified)	Per cent of stores and sales	Men's shoe stores	Per cent of stores and sales	Women's shoe stores	Per cent of stores and sales	Family shoe stores	Per cent of stores and sales
Total stores:								
Number of stores	19,955	100.00	1,144	100.00	1,448	100.00	17,363	100.00
Net sales	$692,491	100.00	$51,742	100.00	$118,898	100.00	$521,851	100.00
All-cash stores:								
Number of stores	14,401	72.17	1,018	88.99	1,148	79.28	12,235	70.47
Net sales	$474,521	68.53	$46,412	89.70	$82,214	69.15	$345,895	66.27
Cash-credit stores, and proportion of credit business:								
1-10 per cent credit—								
Number of stores	2,473	12.39	42	3.67	59	4.08	2,372	13.66
Net sales	$62,343	9.00	$1,603	3.10	$5,585	4.70	$55,155	10.57
11-20 per cent credit—								
Number of stores	958	4.80	16	1.40	38	2.62	904	5.20
Net sales	$31,965	4.62	$771	1.49	$5,111	4.30	$26,083	5.00
21-30 per cent credit—								
Number of stores	725	3.63	21	1.84	36	2.49	668	3.85
Net sales	$27,273	3.94	$893	1.72	$2,913	2.45	$23,467	4.50
31-40 per cent credit—								
Number of stores	569	2.85	13	1.14	41	2.83	515	2.97
Net sales	$29,235	4.22	$494	.95	$2,965	2.49	$25,776	4.94
41-50 per cent credit—								
Number of stores	380	1.91	10	.87	37	2.56	333	1.92
Net sales	$23,333	3.36	$407	.79	$3,884	3.27	$19,042	3.65
51-60 per cent credit—								
Number of stores	176	.88	6	.52	40	2.76	130	.75
Net sales	$21,453	3.10	$183	.35	$8,143	6.85	$13,127	2.52
61-70 per cent credit—								
Number of stores	120	.60	11	.96	27	1.86	82	.47
Net sales	$12,264	1.77	$725	1.41	$5,537	4.66	$6,002	1.15
71-80 per cent credit—								
Number of stores	66	.33	6	.52	13	.90	47	.27
Net sales	$5,193	.75	$230	.44	$1,077	.90	$3,886	.75
More than 80 per cent credit—								
Number of stores	87	.44	1	.09	9	.62	77	.44
Net sales	$4,911	.71	$24	.05	$1,469	1.23	$3,418	.65

TABLE 3B.—SALES IN SHOE STORES,[1] BY STATES

[Sales expressed in thousands of dollars]

	TOTAL STORES ANALYZED		ALL-CASH STORES		CASH-CREDIT STORES	
	Number	*Sales*	*Number*	*Sales*	*Number*	*Sales*
UNITED STATES, total	19,955	$692,491	14,401	$474,521	5,554	$217,970
NEW ENGLAND	1,912	56,216	1,373	40,585	539	15,631
Connecticut	366	11,094	273	7,662	93	3,432
Maine	198	4,758	134	3,213	64	1,545
Massachusetts	1,011	29,744	746	22,596	265	7,148
New Hampshire	127	2,645	83	1,763	44	882
Rhode Island	149	6,032	108	4,698	41	1,334
Vermont	61	1,943	29	653	32	1,290
MIDDLE ATLANTIC	6,302	244,930	5,101	195,020	1,201	49,910
New Jersey	861	27,866	674	23,451	187	4,415
New York	3,350	147,924	2,792	122,521	558	25,403
Pennsylvania	2,091	69,140	1,635	49,048	456	20,092
EAST NORTH CENTRAL	5,363	167,289	3,659	108,918	1,704	58,371
Illinois	1,606	51,078	1,216	32,103	390	18,975
Indiana	612	18,849	441	13,386	171	5,463
Michigan	1,073	32,879	720	20,961	353	11,918
Ohio	1,393	46,777	919	32,507	474	14,270
Wisconsin	679	17,706	363	9,961	316	7,745

[1] Total shoe stores analyzed, in reporting credit information.

TABLE 3B.—SALES IN SHOE STORES, BY STATES—Continued

	TOTAL STORES ANALYZED		ALL-CASH STORES		CASH-CREDIT STORES	
	Number	*Sales*	*Number*	*Sales*	*Number*	*Sales*
WEST NORTH CENTRAL	2,078	54,986	1,268	33,273	810	21,713
Iowa	525	12 636	294	6,651	231	5,985
Kansas	275	6,501	160	3,728	115	2,773
Minnesota	381	10,820	217	6,663	164	4,157
Missouri	546	17,202	378	11,485	168	5,717
Nebraska	210	5,182	142	3,311	68	1,871
North Dakota	60	1,039	33	542	27	497
South Dakota	81	1,606	44	893	37	713
SOUTH ATLANTIC	1,378	50,038	1,040	32,448	338	17,590
Delaware	39	1,611	26	1,057	13	554
District of Columbia	111	6,879	88	3,874	23	3,005
Florida	203	5,552	163	4,211	40	1,341
Georgia	166	6,047	123	4,000	43	2,047
Maryland	229	8,091	190	5,862	39	2,220
North Carolina	190	6,248	145	4,504	45	1,744
South Carolina	90	2,781	73	2,010	17	771
Virginia	218	8,304	140	3,855	78	4,449
West Virginia	132	4,525	92	3,075	40	1,450
EAST SOUTH CENTRAL	574	22,707	414	14,971	160	7,736
Alabama	134	5,650	99	3,663	35	1,987
Kentucky	205	7,006	152	4,850	53	2,156
Mississippi	63	1,933	37	1,070	26	863
Tennessee	172	8,118	126	5,388	46	2,730
WEST SOUTH CENTRAL	873	35,485	652	23,007	221	12,478
Arkansas	84	2,555	58	1,177	26	1,378
Louisiana	195	7,308	153	5,011	42	2,297
Oklahoma	175	6,323	128	4,092	47	2,231
Texas	419	19,299	313	12,727	106	6,572
MOUNTAIN	286	9,371	161	3,961	125	5,410
Arizona	21	667	10	322	11	345
Colorado	104	3,613	66	1,344	38	2,269
Idaho	28	690	10	142	18	548
Montana	49	1,781	22	641	27	1,140
Nevada	10	349	5	180	5	169
New Mexico	15	295	9	91	6	204
Utah	39	1,523	31	1,123	8	400
Wyoming	20	453	8	118	12	335
PACIFIC	1,189	51,469	733	22,338	456	29,131
California	867	40,503	508	15,663	359	24,840
Oregon	120	3,520	85	2,137	35	1,383
Washington	202	7,446	140	4,538	62	2,908

TABLE 4A.—SHOE STORES AND SALES CLASSIFIED BY TYPES OF OPERATION, BY SIZE OF CITY, FOR THE UNITED STATES

	UNITED STATES			
	United States, total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Totals:				
Stores	24,259	15,039	3,634	5,586
Sales, group total	$806,828,989	$626,818,382	$101,448,355	$78,562,252
Per cent of United States total	100.00	77.70	12.60	9.70
Per cent of group total	100.00	100.00	100.00	100.00
Single-store independents:				
Stores	16,013	8,550	2,425	5,038
Sales	$343,014,731	$214,420,373	$61,847,567	$66,746,791
Per cent of United States, total	100.00	62.51	18.03	19.46
Per cent of group, total	42,51	34.20	60.97	84.96
2 and 3 store independents:				
Stores	1,925	1,470	289	166
Sales	$88,803,136	$74,538,620	$11,035,664	$3,228,852
Per cent of United States, total	100.00	83.94	12.43	3.63
Per cent of group, total	11.01	11.89	10.88	4.11

TABLE 4A.—SHOE STORES AND SALES CLASSIFIED BY TYPES OF OPERATION, BY SIZE OF CITY, FOR THE UNITED STATES—Continued

	UNITED STATES			
	United States, total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Other types, principally local branch systems:				
Stores	222	92	54	76
Sales	$5, 871, 362	$3, 053, 426	$1, 681, 425	$1, 136, 511
Per cent of United States, total	100. 00	52. 00	28. 64	19. 36
Per cent of group, total	0. 73	0. 49	1. 66	1. 45
Local chains:				
Stores	1, 344	1, 019	219	106
Sales	$90, 278, 748	$79, 967, 247	$7, 050, 998	$3, 260, 503
Per cent of United States, total	100. 00	88. 58	7. 81	3. 61
Per cent of group, total	11. 19	12. 76	6. 95	4. 15
Sectional chains:				
Stores	1, 072	759	177	136
Sales	$68, 992, 197	$61, 625, 673	$4, 802, 221	$2, 564, 303
Per cent of United States, total	100. 00	89. 32	6. 96	3. 72
Per cent of group, total	8. 55	9. 83	4. 73	3. 26
National chains:				
Stores	2, 834	2, 399	382	53
Sales	$156, 161, 265	$142, 883, 047	$11, 914, 885	$1, 363, 333
Per cent of United States, total	100. 00	91. 50	7. 63	0. 87
Per cent of group, total	19. 35	22. 80	11. 74	1. 74
Leased-department chains:				
Stores	474	412	54	8
Sales	$23, 768, 440	$22, 254, 060	$1, 371, 089	$143, 291
Per cent of United States, total	100. 00	93. 63	5. 77	0. 60
Per cent of group, total	2. 95	3. 55	1. 35	0. 18
Manufacturer-controlled chains:				
Stores	375	338	34	3
Sales	$29, 939, 110	$28, 075, 936	$1, 744, 506	$118, 668
Per cent of United States, total	100. 00	93. 78	5. 82	0. 40
Per cent of group, total	3. 71	4. 48	1. 72	0. 15

TABLE 4B.—SHOE STORES AND SALES CLASSIFIED BY TYPE OF OPERATION, SIZE OF CITY, AND GEOGRAPHIC DIVISION

	NEW ENGLAND DIVISION			
	Division total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Totals:				
Stores	2, 346	1, 381	529	436
Sales	$66, 107, 876	$48, 227, 713	$11, 271, 915	$6, 608, 248
Per cent	100. 00	100. 00	100. 00	100. 00
Single-store independents:				
Stores	1, 679	892	390	397
Sales	$33, 035, 165	$20, 292, 649	$7, 008, 429	$5, 734, 087
Per cent	49. 97	42. 08	62. 18	86. 77
2 and 3 store independents:				
Stores	199	138	53	8
Sales	$7, 579, 974	$5, 704, 204	$1, 695, 138	$180, 632
Per cent	11. 47	11. 83	15. 04	2. 73
Local chains:				
Stores	34	25	4	5
Sales	$4, 585, 850	$4, 357, 754	$95, 290	$132, 806
Per cent	6. 94	9. 03	0. 84	2. 01
Sectional chains:				
Stores	133	87	30	16
Sales	$5, 827, 779	$4, 739, 784	$763, 203	$324, 792
Per cent	8. 81	9. 83	6. 77	4. 92
National chains:				
Stores	184	146	31	7
Sales	$8, 729, 068	$7, 510, 809	$1, 053, 032	$165, 227
Per cent	13. 20	15. 57	9. 34	2. 50
Other types of operation:				
Stores	117	93	21	3
Sales	$6, 350, 040	$5, 622, 513	$656, 823	$70, 704
Per cent	9. 61	11. 66	5. 83	1. 07

TABLE 4B.—SHOE STORES AND SALES CLASSIFIED BY TYPE OF OPERATION, SIZE OF CITY, AND GEOGRAPHIC DIVISION—Continued

	MIDDLE ATLANTIC DIVISION			
	Division total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Totals:				
Stores	7,709	5,516	983	1,210
Sales	$277,754,724	$231,833,543	$28,483,144	$17,438,037
Per cent	100.00	100.00	100.00	100.00
Single-store independents:				
Stores	5,109	3,390	637	1,082
Sales	$107,563,318	$78,619,260	$15,219,982	$13,724,076
Per cent	38.73	33.91	53.44	78.70
2 and 3 store independents:				
Stores	647	539	78	30
Sales	$29,071,947	$25,186,890	$3,249,058	$635,999
Per cent	10.47	10.87	11.41	3.65
Local chains:				
Stores	443	345	62	36
Sales	$31,930,760	$28,217,461	$2,278,196	$1,435,103
Per cent	11.50	12.17	8.00	8.23
Sectional chains:				
Stores	253	190	39	24
Sales	$24,672,573	$22,655,238	$1,533,956	$483,379
Per cent	8.88	9.77	5.38	2.77
National chains:				
Stores	1,039	882	130	27
Sales	$65,150,034	$59,843,489	$4,571,312	$735,233
Per cent	23.45	25.81	16.05	4.22
Other types of operation:				
Stores	218	170	37	11
Sales	$19,366,092	$17,311,205	$1,630,640	$424,247
Per cent	6.97	7.47	5.72	2.43

	SOUTH ATLANTIC DIVISION			
	Division total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Totals:				
Stores	1,590	1,045	269	276
Sales	$56,369,523	$44,289,598	$8,277,399	$3,802,526
Per cent	100.00	100.00	100.00	100.00
Single-store independents:				
Stores	944	528	163	253
Sales	$24,040,089	$15,865,973	$4,777,203	$3,396,913
Per cent	42.65	35.82	57.71	89.33
2 and 3 store independents:				
Stores	150	113	27	10
Sales	$6,948,328	$5,711,557	$1,104,424	$132,347
Per cent	12.33	12.90	13.34	3.48
Local chains:				
Stores	60	53	6	1
Sales	$4,813,558	$4,582,452	$198,578	$32,528
Per cent	8.54	10.35	2.40	0.86
Sectional chains:				
Stores	80	57	18	5
Sales	$4,180,873	$3,712,489	$403,472	$64,912
Per cent	7.42	8.38	4.88	1.71
National chains:				
Stores	286	229	51	6
Sales	$12,335,902	$10,612,252	$1,547,974	$175,676
Per cent	21.88	23.96	18.70	4.62
Other types of operation:				
Stores	70	65	4	1
Sales	$4,050,773	$3,804,875	$245,748	(x)
Per cent	7.18	8.59	2.97	(x)

TABLE 4B.—SHOE STORES AND SALES CLASSIFIED BY TYPE OF OPERATION, SIZE OF CITY, AND GEOGRAPHIC DIVISION—Continued

	EAST SOUTH-CENTRAL DIVISION			
	Division total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Totals:				
Stores	631	367	119	145
Sales	$24,070,521	$17,964,575	$3,980,224	$2,125,722
Per cent	100.00	100.00	100.00	100.00
Single-store independents:				
Stores	369	159	79	131
Sales	$9,847,569	$5,253,859	$2,649,959	$1,943,751
Per cent	40.91	29.25	66.58	91.44
2 and 3 store independents:				
Stores	51	37	9	5
Sales	$2,514,506	$2,040,746	$389,141	$84,619
Per cent	10.45	11.36	9.77	3.98
Local chains:				
Stores	19	17	2	----------
Sales	$1,099,387	$1,029,435	$69,952	----------
Per cent	4.56	5.73	1.76	----------
Sectional chains:				
Stores	45	33	6	6
Sales	$3,412,348	$3,151,902	$210,463	$49,983
Per cent	14.18	17.54	5.29	2.35
National chains:				
Stores	105	86	17	2
Sales	$4,780,566	$4,212,908	$520,989	$46,669
Per cent	19.86	23.45	13.09	2.20
Other types of operation:				
Stores	42	35	6	1
Sales	$2,416,145	$2,275,725	$139,720	$700
Per cent	10.04	12.67	3.51	.03

	EAST NORTH-CENTRAL DIVISION			
	Division total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Totals:				
Stores	6,401	3,917	839	1,645
Sales	$199,390,672	$153,773,690	$22,685,252	$22,931,730
Per cent	100.00	100.00	100.00	100.00
Single-store independents:				
Stores	4,134	2,126	542	1,466
Sales	$88,305,203	$54,958,012	$13,875,580	$19,471,611
Per cent	44.29	35.74	61.16	84.91
2 and 3 store independents:				
Stores	426	329	55	42
Sales	$15,847,657	$12,957,563	$2,069,058	$821,036
Per cent	7.95	8.43	9.12	3.58
Local chains:				
Stores	384	290	63	31
Sales	$23,199,110	$20,642,238	$1,987,483	$569,389
Per cent	11.64	13.42	8.76	2.48
Sectional chains:				
Stores	385	241	63	81
Sales	$18,123,853	$15,182,258	$1,362,860	$1,578,735
Per cent	9.09	9.87	6.01	6.89
National chains:				
Stores	783	683	90	10
Sales	$40,963,594	$38,106,893	$2,623,996	$232,705
Per cent	20.54	24.78	11.57	1.01
Other types of operation:				
Stores	289	248	26	15
Sales	$12,951,255	$11,926,726	$766,275	$258,254
Per cent	6.49	7.76	3.38	1.13

TABLE 4B.—SHOE STORES AND SALES CLASSIFIED BY TYPE OF OPERATION, SIZE OF CITY, AND GEOGRAPHIC DIVISION—Continued

	WEST NORTH-CENTRAL DIVISION			
	Division total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Totals:				
Stores	2,455	999	399	1,057
Sales	$61,530,834	$35,583,574	$11,693,192	$14,254,068
Per cent	100.00	100.00	100.00	100.00
Single-store independents:				
Stores	1,801	575	261	965
Sales	$32,528,359	$12,165,721	$7,678,915	$12,683,723
Per cent	52.87	34.19	65.67	88.98
2 and 3 store independents:				
Stores	122	77	22	23
Sales	$5,915,800	$4,726,721	$705,275	$483,804
Per cent	9.61	13.28	6.03	3.40
Local chains:				
Stores	81	40	27	14
Sales	$3,809,290	$2,529,694	$859,328	$420,268
Per cent	6.19	7.11	7.35	2.95
Sectional chains:				
Stores	83	62	18	3
Sales	$3,598,970	$3,092,098	$449,595	$57,277
Per cent	5.85	8.69	3.84	0.40
National chains:				
Stores	198	161	36	1
Sales	$9,399,236	$8,425,888	$965,525	$7,823
Per cent	15.28	23.68	8.26	0.05
Other types of operation:				
Stores	170	84	35	51
Sales	$6,279,179	$4,643,452	$1,034,554	$601,173
Per cent	10.20	13.05	8.85	4.22

	WEST SOUTH-CENTRAL DIVISION			
	Division total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Totals:				
Stores	992	555	188	249
Sales	$38,974,454	$30,441,452	$5,284,522	$3,248,480
Per cent	100.00	100.00	100.00	100.00
Single-store independents:				
Stores	600	239	131	230
Sales	$16,633,969	$10,023,492	$3,736,482	$2,873,995
Per cent	42.68	32.93	70.71	88.47
2 and 3 store independents:				
Stores	65	44	12	9
Sales	$4,663,991	$4,019,844	$476,633	$167,514
Per cent	11.97	13.21	9.02	5.16
Local chains:				
Stores	62	41	16	5
Sales	$2,859,041	$2,284,848	$412,407	$161,786
Per cent	7.34	7.50	7.80	4.98
Sectional chains:				
Stores	44	42	1	1
Sales	$3,664,428	$3,644,570	$14,633	$5,225
Per cent	9.40	11.97	0.28	0.16
National chains:				
Stores	146	122	24	----------
Sales	$7,254,347	$6,687,041	$567,306	----------
Per cent	18.61	21.97	10.73	----------
Other types of operation:				
Stores	75	67	4	4
Sales	$3,898,678	$3,781,657	$77,061	$39,960
Per cent	10.00	12.42	1.46	1.23

TABLE 4B.—SHOE STORES AND SALES CLASSIFIED BY TYPE OF OPERATION, SIZE OF CITY, AND GEOGRAPHIC DIVISION—Continued

	MOUNTAIN DIVISION			
	Division total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Totals:				
Stores	370	138	79	153
Sales	$12,457,622	$7,168,190	$2,886,850	$2,402,582
Per cent	100.00	100.00	100.00	100.00
Single-store independents:				
Stores	270	74	66	130
Sales	$7,150,466	$2,968,940	$2,387,254	$1,794,272
Per cent	57.40	41.42	82.70	74.68
2 and 3 store independents:				
Stores	45	21	7	17
Sales	$2,462,199	$1,728,996	$339,558	$393,645
Per cent	19.76	24.12	11.76	16.38
Local chains:				
Stores	17	9	3	5
Sales	$665,185	$400,079	$53,723	$211,383
Per cent	5.34	5.58	1.86	8.80
Sectional chains:				
Stores	8	6	2	----------
Sales	$410,929	$346,890	$64,039	----------
Per cent	3.30	4.84	2.22	----------
National chains:				
Stores	26	26	----------	----------
Sales	$1,603,469	$1,603,469	----------	----------
Per cent	12.87	22.37	----------	----------
Other types of operation:				
Stores	4	2	1	1
Sales	$165,374	$119,816	$42,276	$3,282
Per cent	1.33	1.67	1.46	0.14

	PACIFIC DIVISION			
	Division total	Cities over 30,000 population	Cities 10,000 to 30,000 population	Places under 10,000 population
Totals:				
Stores	1,765	1,121	229	415
Sales	$70,172,763	$57,536,047	$6,885,857	$5,750,859
Per cent	100.00	100.00	100.00	100.00
Single-store independents:				
Stores	1,107	567	156	384
Sales	$23,910,593	$14,272,467	$4,513,763	$5,124,363
Per cent	34.07	24.81	65.55	89.11
2 and 3 store independents:				
Stores	220	172	26	22
Sales	$13,798,734	$12,462,099	$1,007,379	$329,256
Per cent	19.66	21.66	14.63	5.72
Local chains:				
Stores	244	199	36	9
Sales	$17,316,567	$15,923,286	$1,096,041	$297,240
Per cent	24.68	27.68	15.92	5.17
Sectional chains:				
Stores	41	41	----------	----------
Sales	$5,100,444	$5,100,444	----------	----------
Per cent	7.27	8.86	----------	----------
National chains:				
Stores	67	64	3	----------
Sales	$5,945,049	$5,880,298	$64,751	----------
Per cent	8.47	10.22	0.94	----------
Other types of operation:				
Stores	86	78	8	----------
Sales	$4,101,376	$3,897,453	$203,923	----------
Per cent	5.85	6.77	2.96	----------

TABLE 5.—OPERATING EXPENSE OF SHOE STORES

A. BY KINDS OF STORES

	Total	SHOE STORES		
		Men's	Women's	Family
Number of stores	24,259	1,402	1,666	21,191
Proprietors	18,408	418	535	17,455
Employees:				
Full time	48,816	2,810	8,146	37,860
Part time	17,795	1,043	2,826	13,926
Pay roll:				
Total	$82,217,787	$5,193,838	$15,673,069	$61,350,880
Per cent of sales	10.19	8.44	11.99	9.98
Part time	$4,332,979	$224,793	$745,239	$3,362,947
Value of proprietors' services	$28,418,024	$742,265	$979,954	$26,695,805
Total wage cost	$110,635,811	$5,936,103	$16,653,023	$88,046,685
Per cent of sales	13.71	9.65	12.74	14.33
All other expenses (including rent)[1]	$126,455,093	$13,117,535	$22,612,769	$90,724,789
Total operating expenses (per cent to sales)	29.39	30.98	30.05	29.09
Net sales	$806,828,989	$61,507,370	$130,080,659	$614,640,960
Per cent of shoe-store sales	100.00	7.62	16.20	76.18
Per cent of United States total	1.64	.12	.27	1.25

B. BY SIZE OF CITIES

	Total	STORES IN—		
		Cities over 30,000	Cities 10,000 to 30,000	Places under 10,000
Number of stores	24,259	15,039	3,634	5,586
Proprietors	18,408	9,676	2,868	5,864
Employees:				
Full time	48,816	38,265	6,393	4,158
Part time	17,795	12,799	2,957	2,039
Pay roll:				
Total	$82,217,787	$67,207,183	$9,703,249	$5,307,355
Per cent of sales	10.19	10.72	9.56	6.76
Part time	$4,332,979	$3,296,424	$621,031	$415,524
Value of proprietors' services	$28,418,024	$17,446,532	$4,075,428	$6,896,064
Total wage cost	$110,635,811	$84,653,715	$13,778,677	$12,203,419
Per cent of sales	13.71	13.51	13.58	15.53
All other expenses (including rent)[1]	$126,455,093	$104,851,179	$13,560,164	$8,043,750
Total operating expenses (per cent to sales)	29.39	30.23	26.95	25.77
Net sales	$806,828,989	$626,818,382	$101,448,355	$78,562,252
Per cent of shoe-store sales	100.00	77.69	12.57	9.74
Per cent of United States total	1.64	1.28	.20	.16

[1] For rent data see Table 6.

TABLE 6.—OPERATING EXPENSE (RENT) OF SHOE STORES IN LEASED PREMISES

	Number of stores[1]	Net sales	RENT	
			Amount	Per cent of net sales
Shoe stores	20,115	$744,737,995	$56,797,777	7.63
Shoe stores, men's	1,304	60,195,509	6,124,243	10.17
Shoe stores, women's	1,626	128,469,515	10,830,466	8.43
Shoe stores, family	17,185	556,072,971	39,843,068	7.17

[1] Includes all stores operating in leased premises. 4,144 stores in owned premises, with aggregate sales of $62,091,000, are not included.

TABLE 7.—COMMODITIES SOLD IN SHOE STORES [1]

COMMODITIES SOLD	ALL SHOE STORES		IN MEN'S SHOE STORES		IN WOMEN'S SHOE STORES		IN FAMILY SHOE STORES	
	Total sales	Per cent	United States total	Per cent	United States total	Per cent	United States total	Per cent
Total sales	$806,828,989	100.0	$61,507,370	100.0	$130,680,659	100.0	$614,640,960	100.0
Men's and boy's shoes	264,576,513	32.8	57,353,013	93.2	136,149	.1	207,087,351	33.7
Women's, misses', and children's shoes	439,912,974	54.5	155,615	.3	109,117,812	83.5	330,639,547	53.8
Rubber and other footwear (including infants' shoes)	40,896,913	5.1	1,312,665	2.1	2,326,684	1.8	37,257,564	6.1
Men's furnishings	3,413,531	.4	1,233,670	2.0			2,179,861	.3
Women's hosiery	42,000,371	5.2			14,503,571	11.1	27,496,800	4.5
Other merchandise and service, including luggage and leather goods	16,028,687	2.0	1,452,407	2.4	4,596,443	3.5	9,979,837	1.6

[1] The method used in computing these sales is the method advocated by the Census Bureau and described in the booklet "How to Use Commodity Sales Data in Retail Census Reports." The commodity percentages shown in Table 15 of each State report are applied to the total sales shown in Table 1 of the same State report, to determine the approximate dollar sales of each commodity, separately for each kind of store selling such commodity.

TABLE 8.—SALES OF SHOES AND OTHER FOOTWEAR IN ALL KINDS OF STORES

	TOTAL SALES OF ALL SHOES		MEN'S, BOYS', AND YOUTH'S SHOES		WOMEN'S, MISSES', AND CHILDREN'S SHOES		RUBBER AND OTHER FOOTWEAR (INCLUDING INFANT'S SHOES)	
	United States	Per cent	United States total sales	Per cent	United States total sales	Per cent	United States total sales	Per cent
Total, all stores	[1] $1,265,011,685	100.0	$439,732,255	100.0	$748,870,786	100.0	$76,408,644	100.0
Total, shoe stores	**733,836,800**	**58.0**	**264,576,513**	**60.2**	**428,363,374**	**57.2**	**40,896,913**	**53.5**
Men's shoe stores	58,821,293	4.6	57,353,013	13.1	155,615	(2)	1,312,665	1.7
Women's shoe stores	100,031,045	7.9	136,149	(2)	97,568,212	13.0	2,326,684	3.0
Family shoe stores	574,984,462	45.5	207,087,351	47.1	330,639,547	44.2	37,257,564	48.8
Total, all other stores	**531,174,885**	**42.0**	**175,155,742**	**39.8**	**320,507,412**	**42.8**	**35,511,731**	**46.5**
Department stores	208,296,184	16.5	46,506,403	10.6	152,929,280	20.4	8,860,501	11.6
Country general stores [3]	115,427,786	9.1						
Groceries with apparel	5,775,882	.4	2,082,206	.5	3,371,382	.5	322,294	.4
Groceries with dry goods	32,808,416	2.6	11,827,434	2.7	19,150,272	2.6	1,830,710	2.4
Groceries with other merchandise	76,843,488	6.1	27,702,077	6.3	44,853,544	6.0	4,287,867	5.6
General merchandise stores	49,654,512	3.9	23,368,023	5.3	22,797,309	3.0	3,489,180	4.6
Mail-order houses (catalogue only)	35,465,066	2.8	12,172,176	2.8	18,789,359	2.5	4,503,531	5.9
Family clothing stores	31,351,500	2.5	12,549,091	2.8	17,334,297	2.3	1,468,112	1.9
Men's clothing and furnishings stores	29,184,454	2.3	25,772,627	5.9	2,339,943	.3	1,071,884	1.4
Dry-goods stores	27,360,269	2.2	6,530,938	1.5	19,262,428	2.6	1,566,903	2.0
Women's ready-to-wear stores	15,643,311	1.2	138,103	(2)	15,440,174	2.1	65,034	.1
Variety stores	14,199,714	1.1	2,137,555	.5	4,067,469	.5	7,994,690	10.5
Men's furnishings stores	2,342,699	.2	2,331,928	.5			10,771	(2)
Army and Navy goods stores	2,249,390	.2	2,037,181	.4	171,955	(2)	40,254	.1

[1] See also table, by States, on p. 30.
[2] Less than one-half of 1 per cent.
[3] In the absence of data distinguishing between the sale of men's and women's shoes in country general stores, the same ratios are used as those found to exist in shoe stores. All data regarding commodity sales in country general stores are necessarily based upon imcomplete and perhaps inadequate breakdowns, covering only 424 stores out of a total of 104,089.

A table similar to this can be prepared for any State from the several State reports.

TABLE 9.—PRODUCTION, IMPORTS AND EXPORTS OF FOOTWEAR FROM CENSUS OF MANUFACTURES

[Expressed in thousands of dollars]

	1925	1927	1929	1930	1931
Value of footwear, manufactured	$925,383	$944,714	$965,923		
Value of footwear, imported	2,915	5,918	18,773	$11,263	$7,018
	928,298	950,632	984,696		
Value of footwear, exported	15,667	12,900	15,804	12,007	7,524
Balance (available for domestic market)	912,631	937,732	968,892		