



**COLES MYER
&
GROCERY RETAILING
IN TWENTIETH-CENTURY
AUSTRALIA**

by

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"Has not the public a right to be considered?... What are traders if not servants to the public?" Sidney Myer, 1911.

"A store has no right to success just because it is open for business and has a bright display. The goods must reflect the wishes of the community in which the store is located." A. W. Coles, 1933.

PERIODS OF CHANGE

The history of grocery retailing in twentieth century Australia highlights the central fact that the trade has constantly striven to provide shoppers with more choice. It has succeeded abundantly in doing so. The number of items offered to the consumer has grown from about 400 soon after the Second World War to 40,000 or more now, a rise of over 100 fold. Although this survey will recount the stages of the increase, the magnitude of the change virtually speaks for itself. Add in the calculation that the price of a standard basket of groceries has been reduced by one-quarter over the past 25 years and vast gains for the consumer are utterly undeniable.

The opening section of this history describes a number of landmark changes over the period since 1914, when George James Coles opened his first variety store in Collingwood,

Victoria. It is a narrative account of the retail grocery trade decade by decade. The continual evolution of supply and demand is traced from the days of hawkers and small corner stores to the present, when it is scarcely fanciful to describe the newest supermarkets as Aladdin's caves. The early history sets the scene for sections on developments since the Second World War. The story is carried to the brink of the major change now expected in direct selling as a result of widespread public use of the Internet. Emphasis is placed on the role of Coles Myer, a company formed from the two long-established Australian companies whose names it incorporates.

The retail trade has accommodated and even anticipated enormously changing consumer preferences. These preferences have been shaped and reshaped by massive changes, particularly in the latter part of the century, involving many factors including technology (universal motor cars and refrigerators, the computer) and a domestic revolution that has released women to play a huge role in the paid workforce. The Australian public has become extraordinarily diverse and more demanding with respect to the range of foodstuffs it wishes to buy, a range which it seems to wish to see constantly expanding. At the same time consumers have become intensely sensitive to matters of food quality and food safety, while expecting competitive prices and opening hours that suit their multifold convenience.

The kaleidoscopic diversity of goods and types of store nevertheless makes many general observations hazardous, as do differences among the states, among suburbs and between city and country. The retail grocery trade perpetually faces the operator with the predicament of whether to add value to products, to compete on price, or try to strike a balance. Different firms at the same time, and the same firm at different times, have explored all the possibilities. There will be exceptions to any generalisation that attempts to pin down so much variety. For all that, the trends and the characteristically active behaviour of the industry remain clear.

Since everybody shops, everybody has an opinion about shopping. People tend to base their estimates of how much change there has been on the difference from the style of shopping in their own formative years. Someone who can remember only as far back, say, as the 1970s will take for granted facilities that someone else who can recall the 1940s will consider the result of a modern revolution. Both are likely to have rosy-tinted impressions of corner shops, youngsters because such things will seem quaint and old-fashioned, their elders because memories tend to soften with age. The historical information here helps to present the clean, convenient and well-filled modern store in a more objective light.

In the late 1990s the trend towards supplying greater choice is continuing at a rate and with a profusion that earlier

generations would have thought pure science fiction. The 1990s stand out as a decade of astonishing improvements. From the retailer's side, however, the process of development remains as it has always been, a matter of trial and error. Although the dominant theme of the century has been waves of expansion in the size and complexity of stores and range of products, the offerings set before customers are subject to the technological limitations prevailing at any one time and occasional ill-judged ventures by companies. But even misjudged innovations have benefited the consumer since they denote an energetic industry willing to ensure that, in the words of Sidney Myer and A. W. Coles, it considers the public and reflects the wishes of the community.

During the twentieth century the retail food industry has been subject to extraordinary pressures, of which we can pick out three main types:

- 1) external shocks, such as two World Wars and the Depression
- 2) the evolution of socio-economic structures that have raised incomes, altered household arrangements out of recognition, and increasingly replaced stay-at-home housewives with a cohort of independent, educated and working women
- 3) changes in the public mood when people have tired of

some styles of format and unexpectedly spurned certain products (an example is lard).

The industry has been obliged to react to these pressures. Yet it has not remained a passive responder; it has actively created surges of innovation. Here it will be insisted that the continual probing to discover which new ideas the consumer will take up has been socially desirable: the consumer has been the gainer overall. Lively retailers, past and present, have usually gone out of their way to find novelties from which the public may make its selection. The consumer has nevertheless been the one to make the decision about what to buy and where to buy it.

Home delivery was the first truly major transformation. It started early in the century, when it began to supplement reliance on local shops. The home delivery era persisted into the 1950s, until the onset of the second great transformation. That was the rush to create suburban self-service stores, precursors of the soon-overlapping establishment of large modern supermarkets. This development extinguished the occupations of door-to-door delivery men, apart from a few milk and bread roundsmen: 'recollections of such tradespeople were smashed to bits, like the prices, by the supermarket' [Symons, p.177; italics supplied]. Australians rapidly voted with their feet, or rather their cars, for the convenience and low prices of the supermarket.

The four subsequent decades of the supermarket era have been characterised by repeated increases in size and alterations of format, as well as astonishing extensions of the range of products on offer. Yet, rather than the simple trend to gigantism that this suggests, the average size of Coles stores is falling a little at the end of the 1990s. The company is establishing 'Express Stores' in central business districts in order to serve the current trend towards inner city living and the homeward rush of commuters who, though they have disposable income, see themselves as 'time poor.' This means that there is more to the history of growth than meets the eye. During most decades the retail grocery trade has certainly expanded in one shape or form but it is instructive to note the more defining feature: willingness to adapt to what the market wants.

At the end of the millennium the plain fact is that consumers want everything. To quote the American super-retailer, the late Sam Walton of Walmart, 'as a consumer, you want everything: a wide assortment of good quality merchandise; the lowest possible prices; guaranteed satisfaction with what you buy; friendly, knowledgeable service; convenient hours; free parking; a pleasant shopping experience' [Walton, p.173]. Modern Australian consumers have all these expectations.

The 1920s

From the very start of the twentieth century retailing has remained in flux. Australia has always been an exceptionally urban society and at the start of the period much of the population lived in what are now inner suburbs, with shops within an easy walk. Households were also surprisingly self-sufficient: photographs of backyards in the early part of the twentieth century show dense rows of rabbit hutches, chicken runs, vegetable plots and fruit trees. But already, and especially after the First World War, this world of small localities was in the process of being replaced by a new one dominated by suburban living and home delivery.

As suburbs developed around Australian cities, even low-income households came to rely on shops that took orders and delivered to the home via a cart. Low weekly earnings and shortages of cash necessitated frequent, small purchases. In addition, suburbs with quarter-acre blocks were well spread out. Visits to distant shops were a chore, especially in rain or hot weather. Suburban houses did not at first contain any advanced means of refrigeration but possessed Coolgardie safes, and later ice chests, and built-in pantries that had to be restocked often. Hence perishable items like milk, ice and bread were delivered daily. The rabbito and the fish seller sold from door to door. A mythology has built up around deliveries of this type,

romanticising the visits to make them seem the highpoint of the lonely housewife's day. Perhaps they were for some, though for others the practice must have been a mild irritant. 'The greengrocer would always interrupt lunch, whenever we had it', Michael Symons recalls, 'and after hiding away in his tall green van, crunch down the gravel drive with his filled deal box' [p.177].

Retailers thus followed their customers out to the spreading suburbs, so to speak, by means of delivery carts, wagons and eventually vans. In addition many city retailers established branches in the new suburban shopping strips. Australian customers in this era bought a familiar range of brands and grew to expect plentiful food, though by later standards the variety within many lines was limited. Advertising permitted manufacturers to speak directly to consumers and there were early grumbles about the de-skilling of grocers. These men (they were inevitably men) ceased to blend teas, for example, and instead filled orders for prepackaged brands. The positive side of this development was that it made entry into retail grocery easier for people who had not served the long apprenticeship necessary to become master grocers.

The 1920s was a decade of particular expansion and experimentation. In terms of formats, the firm of Grace Brothers experimented with a cash-and-carry food department in Sydney as early as 1920 and a Brisbane chain did so in various

Queensland centres in 1923, although in the event cash-and-carry did not spread far beyond variety stores. Nor did turnstiles find much favour, though they were in use in a few self-service groceries in Victoria as early as 1926.

As an example of product change, a greater range of breakfast foods became available in the mid-1920s and the consumption of bread actually started to fall. Even pre-wrapped bread was offered as early as 1928 though it did not catch on; housewives tore the paper open to see what they were getting. The future had not quite arrived.

The 1930s

The Depression of the 1930s reined in the experiments and accelerating changes of the 'twenties. The real income of most families grew only slowly, for some it did not grow at all, and for the unemployed it fell. Income per head had been \$1046 in 1914, recovered during the twenties from a wartime fall, but only to \$980, and fell back to \$934 in 1933 (in dollars of 1966-1967). By 1939 it had only just regained the level of 1914, but no higher. A refrigerator then cost ten times as much as an ice chest and, as it happens, ten times the average male's weekly wage. In any case during the 'thirties the looming fear of unemployment depressed expenditure.

Methods of retailing groceries during the interwar period -

home delivery and the corner store - are easily romanticised. Assistants in small shops worked long hours and seldom had holidays, sick pay or morning and afternoon breaks for tea. The corner store was often cramped, poorly equipped, and heaped with goods that left only a tiny space for selling. This crowding of shop space persisted into the 1950s. During the Depression years price mattered so much that product quality was often sacrificed. A number of grocers did introduce cash-and-carry shopping because there were districts in which it was no longer advisable to extend credit nor profitable even to continue home deliveries.

The 1940s

From the customer's point of view the 1940s were another rude shock. 'Austerity menus' were the order of the day. 1942-1944 were really hard years. By 1944 consumption per head had fallen below that of 1939 for poultry and game, tomatoes and citrus fruits, meat, milk and milk products, sugar, and oils and fats. The least fall was 7 per cent. for oils and fats; for poultry and game it was as much as 32 per cent, and for meat as a whole 16 per cent. Admittedly, the consumption of cereals, potatoes and eggs rose but the tightening of belts and restricting of food choices was obvious. Despite the cut in meat consumption, American servicemen stationed in this country were scornful of local tastes that continued to glory in meals of 'meat and potatoes' and skimped, relatively speaking, on fruit

and salads.

The war years slowed, even halted, the redesigning of grocery shops for self-service, a trend that had originated in the USA in 1916 and dominated that country during the 'thirties. Rationing, commodity shortages and price controls persisted for years into peacetime. In NSW price controls were not finally abandoned until 1955. The period was a dour one. In a savage attack on the costs of the protectionism then ruling, Robin Boyd pointed out that Australian manufacturing was supplying kitchen equipment that was ten years behind that of the USA. Whereas in the nineteenth century Australians had imported every latest gadget, once local manufacturers took over 'the housekeeper sometimes had to wait many years before new labour-saving devices were offered her' [Boyd, p.255].

Under-equipped kitchens were not ready for a revolution in culinary habits. It comes as no surprise, then, that retailing was also said to have 'stood still' during this period, though in fairness this did not apply to all aspects of the product range. There, the likely future was becoming clearer with the post-war introduction of prepackaged frozen foods and meat, Nestle's introduction of cans of strained vegetables for babies, and frozen Chinese meals which were first sold in 1949 - from icecream cabinets. The 'war lag' of ten years affected formats most. Not until 1949 were the food departments of very many department stores converted to self-service, while the first, or

almost the first, fully self-service grocery opened in Sydney no earlier than 1950.

The 1950s

Home delivery persisted into the early 1950s: at that date 'our milkman still leapt the fence before dawn to fill the billy,' recalls Symons [p.177]. A majority of shops had old-fashioned premises when the decade opened. Housewives queued while the grocer and his assistants scurried about filling each order. Counter displays offered the only opportunity for impulse buying; the assistants were said not infrequently to be too tired to make suggestions about what to buy.

Yet the early 'fifties were marked out by the entry of self-service stores and by more and more prepackaged food. The decade was an increasingly prosperous one, with suburban living customary and car ownership becoming the norm. Annual income per head, which in 1939 had been \$1045, rose after the war, reaching \$1179 in 1947 and moving well up to \$1627 by 1961 (all in 1966-1967 dollars). More women were working. They had less time to shop, though television advertisements increasingly made them aware of what was available (the first television with commercials came to Sydney in September, 1956). Seventy-three per cent. of metropolitan homes owned a refrigerator in 1952, when the cost was still some six times the average male wage. Ninety-three per cent. of all Australian

households owned one by 1956. A week's perishables could safely be kept. These developments facilitated large family purchases, preferably made in a single store. Self-service meant that shopping was carried out rather briskly by choosing for oneself rather than standing at a counter for assistance or waiting at home for a series of delivery men, for which fewer customers were able to afford the time.

Already in 1954 there were 766 self-service stores in Australia and by 1957 the Australian Financial Review was reporting that food retailers were converting to self-service at the rate of 40 per month. By the end of that year there were 1700. Regional shopping centres were also first opened in 1957 in Melbourne, Sydney and Brisbane. Summer, 1958, saw a staggering leap of 25 per cent. above the number of self-service stores that had existed in 1957: by February there were 2,126. Associated innovations appeared in the form of equipment such as turnstiles and trolleys. In 1958, a survey of 9,000 Melbourne housewives found that 61 per cent. did indeed prefer self-service to either counter service or home delivery.

The industry was responding eagerly to their preference. The 'fifties was the decade of the self-service-cum-supermarket transformation. Coles and Woolworths were trialling self-service in 1956. It immediately became popular through, as Coles found, permitting the customer to choose 'exactly what she desires' [Humphery, p.111]. Coles soon decided that it was

'past the stage of experimenting'. It leap-frogged the phase of conversions to self-service by establishing big, purpose-built, free-standing, suburban supermarkets. These were of course in essence large-scale self-service stores, though with a full range of products that included meat, bread and vegetables. The first was opened in North Balwyn, Victoria, in March 1960 and there were eight by 1962.

These big supermarkets were one-stop shops with a full range of merchandise, pre-packed meat, fruit and vegetables, and cakes baked daily on the premises. They were recognisable predecessors of modern stores that contain their own delicatessens (and perhaps successors of the Coles cafe back in 1924). It might not have been possible, however, to anticipate that by the late 1990s Coles would employ thirty chefs and rebuild the Grace Brothers department store in Sydney to house four restaurants.

Widespread availability of cars was vital to the upsurge of supermarket shopping in the late 'fifties. The weight of an average family's food and beverages was about 50 kg. per week, which could be conveniently carried only in one's own vehicle. As the following table shows, the density of car ownership more than doubled during what may be termed the mass entry phase of supermarkets, or what one author calls, more picturesquely, the introduction of 'carpark shopping' [Symons, p.177].

Population per car
(to nearest whole number)

1921/22	55
1929/30	11
1945	9
1957	7
1968	3

[Whitwell, pp.14, 46]

The 1960s and 1970s

The affluence of the 'fifties continued in the succeeding decades. Income per head rose from the \$1627 of 1961 to \$2398 in 1974 (again in 1966-1967 dollars). The Cost of Living index published by the Commonwealth Bureau of the Census had to be replaced because it no longer reflected reality. In 1962 the quarterly Consumer Price Index was introduced, supplemented from 1973 by a monthly index of food prices.

For the moment we need touch only lightly on the 1960s and 1970s, noting four other important tendencies:

- 1) the growing technological richness of the grocery

environment, symbolised by the earliest fully computer-controlled warehouse, which Davids opened in Sydney in 1972 (only one A & P warehouse in Toronto was earlier)

2) the rise of 'banner groups' and other arrangements whereby independent retailers sought to meet the low prices charged in chain supermarkets by combining their purchases - a knock-on gain for the consumer

3) the prevalence in the 'seventies of waves of amalgamations when one chain of stores took over another - which can likewise be seen as a consumer gain because it greatly facilitated the opening and shutting of outlets to match shifts in the distribution of population

4) complaints that mass production and supermarket selling had impaired the quality of some foods.

The criticisms of supermarket foods deserve to be looked at in a little more depth. Considerations of price were said to be ousting those of flavour. Supermarkets were blamed for requiring growers to supply unblemished, regularly-shaped fruit, waxed to look more attractive. Orchardists grew few varieties of apple other than Granny Smiths, Delicious and Jonathans. Tomatoes were grown large to reduce handling costs, uniform to fit foam trays, and tough to last well on the shelf. Battery

chicken were said to be bloated and tasteless. In 1981 the consumer magazine Choice reported that it was unable to buy commercially a genuine free-range chicken anywhere in Australia.

Nevertheless diets were already becoming more varied than the 'meat and potatoes' that Americans had deprecated during the war. The annual consumption of beef and veal, which had been 64 kg per head in 1938-39, was down to 40 kg by 1970-1971. By contrast, the annual consumption of dressed poultry was sharply increasing at the end of the 'sixties (9 kg per head in 1968-1969 and 11 kg in 1970-1971). Whatever the truth about their palatability, the sale of dressed and frozen poultry really took off in 1963. It was greatly encouraged by the adoption of home freezers (by 1978 one in three households owned a freezer) and, ironically, by the public's inability to buy red meat at convenient times as a result of restricted trading hours. The consumption of other frozen foods and fruit juices also jumped from the 1960s.

Cheese is said to be 'the barometer of social changes' [Walker and Roberts, p.12]. A survey of 1966 revealed the dismal fact that 40 per cent. of Melbourne housewives had never tasted any variety of cheese other than cheddar. In 1976 a state premier actually supported a ban on imported cheese with the pronouncement that, 'just because a few migrants want their spicy tucker, I fail to see why the Australian community as a

whole should suffer' [Raphel and Raphel, p21]. The 'New Australians' were not going to put up with this restriction and the remainder of the population also decided to reject such bigotry. In reality, gouda, ricotta, fetta and mozzarella were all being manufactured and sold in Australia by 1976.

The 1980s

The 1980s saw a general introduction of electronic aids to selling. Front-end scanning originally appeared in an independent grocer's in Sunshine, Victoria, in 1980; this was adopted by Coles in 1982 and by other chains during the next two years. It made the check-out much faster and more accurate. Format changes were also evident. Coles opened its big new-look Super K stores in the 'eighties, with twice the floor space of its largest 1960s stores.

Nevertheless the 1980s was a relatively dull decade, not to be compared with the tentative excitements of the 'twenties or the boom in remodelling retail outlets of the 'fifties. The public may have become jaded and tired of bland, mass-produced food, even though the supply was reliable and cheap. The buying of cheese and freshly-ground coffee went into a decline. Self-service meant the end of the grocer as a surrogate family retainer, an expert who would personally guide the customer's choice. One critic objected to 'bread stacked in anonymous aisles, peas frozen in plastic and pineapples... entombed in

cans' [Symons, p.187]. According to him, supermarkets had become impersonal, unpleasant and even unreal. Although this was not borne out by his own figures - he cited a survey in which 54 per cent. of shoppers found them pleasant or better as against 15 per cent. who found them unpleasant or worse - articulate opinion was turning to a negative view of supermarkets.

That there was some substance to accusations of a lack of flavourful foods, or at any rate some sign that more discriminating consumers did exist, was witnessed by the founding of gourmet and food magazines. These promoted fashions in food as other magazines promoted them in clothes. Large supermarkets meanwhile placed constant quality, regular supply and level prices at the top of their concerns. Interested in long shelf life, they emphasised tinned, dried and frozen foods. They were driven by the efficiencies of their operating systems and were drifting away from a customer focus, or rather the discriminating customer was drifting away from them. They had succeeded beyond all expectations at mass selling yet gave the impression of being unadventurous in layout or offerings. The improvements they had brought, the reliability, convenience and lower prices, were not enough for the more complex society evolving in Australia. The trade had run fast but society had run faster. This was explicitly recognised by Bevan Bradbury, former chairman of Coles Myer, in 1987.

Part of the problem at this period was slack competition in the industry. Each of the supermarket groups could point to a period when it has not kept pace with consumers' expectations and its patronage has fallen off. For Woolworths the worst decade was the 1970s, when the company actually lost money. Coles then rode high, until in the 1980s it began resting on its laurels, which led to sales falling off, market share shrinking, profits falling, and innovation being stifled. During the 1980s Woolworths became the leader in supplying fresh food. For Coles a fresh approach awaited the 1990s, which was to seize a place in the front rank of innovative decades.

The 1990s

In interviews today, senior managers at Coles tend to make much the same striking observation: during the 'nineties 'people have changed', employees and customers alike. This is an intangible but nevertheless fundamental matter, the other half of what has been called, 'Coles Myer's near revolutionary push to test new retail concepts' [Australian Financial Review, 16/1/99].

The sea-change in consumer attitudes may perhaps be attributed to the greater availability of information, assisted in part by the Internet and undoubtedly spurred by the spread of higher education. People possess more information and demand still more. They ask to be treated as individuals. They

are intolerant of risks to their health and accordingly expect scrupulously clean stores, absolute concern with food hygiene, and new-style 'look-in' delis where they can observe the preparation of meals taking place. The market is virtually fragmenting into a mosaic of specialised tastes, though this is overlain by a good deal of exploratory buying as consumers test the range. A far more extensive variety of goods and services is demanded than in the past.

A shift in the composition of the Australian population, ethnic, educational, occupational, is taking place. It is easy to be overtaken by the rapidity of this change, which, as we shall shortly show, has made the nature of consumers immensely complex. Social complexity tends to start as a city phenomenon, assimilating Australian society to the norms of urban areas in all the developed countries. But the change in rural consumers is marked too. One feature of modernity is that the rural-urban gap narrows. Country people are immediately informed about new lifestyles; television and greater personal mobility see to that. Their kitchens possess domestic equipment entirely adapted to modern living and modern cuisines.

Responding to this post-modern marketplace, and also to the downward pressure on sales and profits during the late 1980s, Coles changed its culture. This is abundantly clear in the range of goods on sale, as we scarcely need to reiterate.

Less apparent, but equally dramatic, is the altered environment of the company workplace. Coles Myer is committed to establishing a skilled and trained, permanent workforce, capable of handling intricate tasks. Casual workers have less place in the modern retail environment and have been sharply reduced nationally, from 60 per cent. of the workforce in 1994 to 38 per cent. in 1998.

The company also undertook a fundamental shift in its operations. Firstly came a centralisation, particularly of buying, which since about 1991 has taken place at the national level instead of at the level of six state companies. Best practice now spreads more easily among the states. The economies of scale that result can be passed on rapidly in lower prices. 'We are in the infancy of the supply chain', one buyer commented in 1999. He promises further gains from working closely with suppliers and farmers, helping them with their business plans and supporting applications for bank loans, though this is a flexible form of vertical integration that does not involve the managers of Coles Myer themselves becoming farmers.

Hard on the heels of centralisation, about 1994, came another development, which sounds contradictory: localisation. However this means localisation-in-centralisation. Store managers continue to reap the benefits of centralised purchasing but have been freed to customise a proportion of their offerings to the demographic features and purchasing

habits of their store's trading area.

About the same time came a reorganisation of the business towards an open texture that encourages and rewards new ideas from any employee. Lastly, but not unrelated to this innovative culture, formats have proliferated, such as Express stores, 'Fast and Fresh' convenience stores, and 'Let's Eat', with its ingredients for gourmet meals and individual advice on how to prepare them. These developments are intended to suit some of the many distinct social groups in the community. The trade has taken a long step forward from the environment of mass consumption that prevailed fifteen or twenty years ago.

INFLUENCES ON CONSUMPTION

An outline history of consumers during the twentieth century might be organised around any number of variables. Prominent among them would be the evolution in the size and composition of population, immigration, workforce and household; the shift in where people live; and the overall rise in purchasing power. The analysis might be elaborated to emphasise the growing role of women in the workforce, supposing them (correctly) to be the chief decision-makers in grocery buying. The story would need to be further refined to take account of other consequences of rising incomes, such as the way car and refrigerator ownership became universal, and the modern ability to indulge tastes for such diverse categories as health foods, convenience foods and

exotic foods, each of which the retailer is called upon to supply.

Above all, a history of consumers would need to recognise their increased diversity in ethnic and other respects, their greater education and wider experience of the world. These factors have produced an explosion of tastes. As a former head of the Australian Centre for Retail Studies concluded his own historical sketch, 'more than any other industry, retailing encapsulates society, delivers its standard of living and mirrors its aspirations' [Collins p.22]. These aspirations have usually, though not quite always, been borne in mind by the trade. They are multiform today, which makes the challenge to the food retailer greater than it has ever been.

The structure of population

Australia's population has grown in every period but from the standpoint of retail markets the essential features relate less to total size than to changing composition. Let us select some indicative facts about the population since the Second World War. The age composition has changed. People are living longer. The proportion of those of 65 years and over is growing while that of 15 and under is shrinking. The already high urban proportion continues to increase. In 1986 85 per cent. already lived in towns of over 1,000 people and this reached 89 per cent. by 1996. Capital city shares of state populations have grown.

At least as significant has been the surge in immigration. From a record low of 766 persons per year entering Australia in 1936-1940, the number shot up after the war to 60,998 in 1947-1960 and to well above 200,000 in 1968-1969 and subsequent years. During the 1960s the intake continued to derive largely from traditional and culturally similar, though not identical, sources in Britain, Ireland and New Zealand. It was however diluted by flows from other European countries, notably Italy, Greece, Germany and the Netherlands. Asian immigration, once suppressed by the 'White Australia' policy, became more evident in the 1980s, and the origin of Australians today is the whole wide world.

The market implications of a country of immigrants are worth considering at some length. Immigrants have had an enormous influence on Australian creativity and made a massive difference to tastes. An illustration is the soaring sales growth taking place throughout the industry in 1998 in Mexican foods, spaghetti sauces and Indian Foods, while the most dramatic increase in sales among all so-called ethnic foods is dry pasta (27 per cent. up on 1995).

The initial effect was nevertheless not the liberating one now so evident. Immigrants often sought out small shops like those to which they were accustomed and which could be relied on to specialise in ethnic foods not initially available in larger

stores. Immigration actually helped to reduce average meat consumption, mainly because in no other country (except the USA) did people expect to eat nearly as much meat per head as was eaten in Australia. Immigrants from Mediterranean countries were less enamoured of potatoes than was the existing population, and consumption fell. Nor were they great tea-drinkers. Sales of tea fell (coffee consumption passed that of tea in 1979). There was no gross 'Hollywood effect' whereby immigrants outstripped local levels of consumption, as sometimes happened in the United States. But immigration started to diversify the Australian diet and cuisine.

How far cuisine was transformed is clear when we contemplate the typical cafe meal of the early 1950s: steak and chips, white bread and butter, icecream with passionfruit or rockmelon, and a cup of tea. White bread and perhaps brown: as a single instance of the change that had just begun, the Riga Bakery opened at Bankstown in 1949 to supply immigrants' more varied tastes. By 1982 it was selling eighty varieties of bread to a large clientele. The Italians added pasta and the Vietnamese added rice.

The more confident and prosperous second generation of immigrant communities widened the Australian diet dramatically and began the process of melding ingredients that has already produced a distinctive 'Mediterrasian' cuisine in this country. The many sociological influences on the formation of taste are

not readily separable, though the consequences are plain and a major role for immigration is beyond dispute. Immigrants are exploratory people. They have often moved, if only from country to town, before finally leaving their home countries. A surprising number, including many of British descent, came to Australia after experiencing a spell in some other Commonwealth country. Even immigrants arriving directly from English-speaking countries were likely to be more adventurous than those who had stayed at home, a trait which spilled over to experimenting with foods.

The population was in any case rapidly becoming mixed. Whereas the proportion born in Australia had fallen to 80 per cent. by 1971, this still fails to bring out the extent of cultural mixing. Only 61 per cent. had both parents who were Australian born. Add to this in-built mixing the swelling influences of television, higher incomes, higher education, diverse role models, travel abroad by Australians and the stream of tourists coming in, besides the remarkable opportunity of sampling unfamiliar foods in Australia's own ethnic restaurants, and one gets the correct picture of cultural ferment. The sheer numbers and combinations of national or ethnic foods for which someone in the community already possessed a taste brought home to food retailers what they could do by way of stocking an unprecedented array of goods. When they diversified the supermarket 'Offer', as the trade calls what it sets out for sale, this produced its own 'demonstration effect.' People who had

seldom contemplated trying exotic foods were brought face-to-face with infinite possibilities.

Meanwhile a gender revolution was taking place. The share of women in the workforce doubled in fifty years, with all that this implies for female independence, personal income, and buying habits.

Percentage of females in the workforce

[to nearest whole number]

1947	22
1954	23
1961	25
1966	28
1971	32
1987	40
1990	41
1998	43

[Whitwell, p.22; Australian Supermarket Institute, pp.32-33].

The proportion of married women at work climbed even more steeply. In 1947 it was only 4 per cent. but by 1971 it had already reached 21 per cent.

Households fell in size, being 2.7 persons on average in 1996 as opposed to 3.5 exactly thirty years previously. The very

striking pattern of changes over twenty-five years is shown in the following table. By 1998 55 per cent. of households were made up of only one or two people, a fact of considerable significance for purchasing habits.

Household sizes as percentages of all households

<u>Number of residents</u>	<u>1971</u>	<u>1996</u>	<u>Percentage change</u>
One	13.6	22.1	+ 8.5
Two	26.5	32.5	+ 6.0
Three	18.0	16.8	- 1.2
Four	18.7	17.0	- 1.7
Five	12.2	8.1	- 4.1
Six or more	11.1	3.7	- 7.4
Average	3.3	2.7	- 18.2

[Source: ABS Economic and Demographic Statistics].

Related trends have been delayed marriages, single-parenting and childlessness. In this respect more than any other we tend as a society to suffer from 'assumption drag' in that we still think in terms of 'traditional' families comprised of couples with children. In reality the number of such families has continued to shrink during the nineties, whereas the number of one-parent families and families with no children has gone on rising.

DINKS, that is to say couples with double incomes but no kids, comprised 30 per cent. of households in 1986 but an astonishing 40 per cent. by 1998. With so many women, especially married women, working, so many childless couples, so many single parents, and so many households with a high leisure preference and the means to indulge it, the opportunity costs of time have soared. The average age of first births has risen, giving more people the chance to establish a consumer lifestyle before starting a family. The implications of all these tendencies for spending on ready-prepared, convenience foods are enormous.

Consider the following information about freshly-prepared meals, first those designed to be heated and served at home - they rose from 9 per cent. to 14 per cent. of meals over the period 1996-1998 alone. Next consider ready-to-eat hot meals, that is meals like pizza or hot chicken that do not even have to be heated - according to an A. C. Nielsen survey one-third of metropolitan grocery shoppers bought such a meal in a single week in 1998. Moreover 44 per cent. of shoppers expressed interest in the category and the market is expected to boom. Supermarkets sell the lion's share of ready-to-eat foods.

The average time spent on preparing a meal is said to have fallen from thirty minutes in the 1970s to ten minutes in one generation. The 'nineties have emphatically not seen any more time spent on average on food preparation, however long

dedicated gourmets may spend in the kitchen. But over the period from 1992-1997 a 31 per cent. increase was reported in the average time spent actually consuming food and drink. Much of this time must be lavished on eating and drinking as a pastime and in order to socialise. It shows an evolutionary jump, perhaps even a revolutionary jump, in the Australian consumer's interest in food.

As the twenty-first century begins the market is characterised by small, autonomous, busy and often quite well-to-do units. These units - these people, these consumers - have more diverse points of reference and lifestyles than any previous generation. None of this is astonishing, though it may be useful to point out once more the perils of assumption drag: Australian reality has far removed itself from the image in the minds not merely of foreigners but sometimes of its own residents. The point may be grasped by remembering that the economy no longer rides 'on the sheep's back.' Revenues from tourism are now several times greater than those from wool. The value of manufactured exports is approximately equal to that of the export of farm goods. The economy is ever more a service economy and even more a knowledge-based one. An enormous input of science and technology enters the production of the 'elaborately-transformed manufactures' that figure increasingly in exports, just as more and more technical knowledge enters the financial services and information technology sectors.

The workforce that engages in these activities, or at any rate in their leading sectors, is far better educated than before. It is white collar, with diplomas, degrees and advanced degrees, and tastes that are correspondingly advanced. With the relaxation of restrictions on trading hours in some states, it is as though a blanket has been lifted that was smothering the public's preferences and making them appear more uniform than they really were. Surveys of shoppers now distinguish between morning, afternoon, evening and 'night owl' groups. Time of day actually exhibits more of a pattern than days of the week, though young working males and people with high incomes do tend to favour Saturday shopping and young, wealthy single males prefer Sunday. The emphasis on the relative youth of these groups suggests that such habits will go on growing. Unsurprisingly, then, late evening and late night shoppers, who constituted 5 per cent. of all shoppers in 1990, had become 9 per cent. of the whole by 1996. The market has broken up into ever more varied, demanding and fickle elements - a retailer's nightmare or a retailer's dream, and undoubtedly a retailer's challenge.

RESPONSES FROM RETAILERS

For simplicity's sake, the attention that grocery retailers have given to the demands of customers may be dealt with

under three headings, product range, store size, and new technology. It is obvious that the list of relevant topics could be extended and each could be greatly elaborated, but there is no need to gild the lily. These headline categories are sufficient to demonstrate the vigour of the response.

Product Range: The 'Offer'

The array of product lines on display in supermarkets has been expanding for decades. The fact cannot be gainsayed. There has been a 100-fold increase in fifty years. The 'Offer' is at an all-time high and is still expanding. Coles has 'densed up' its shelves and so reorganised its stores that the customer can see 'product' around all 360 degrees. Part of the reason for this is that space was at a premium in existing stores, at least until layouts were amended. The Coles store at Donvale, Victoria, as a single example, now carries over 40,000 different lines and although it is a large and newly-renovated new store, it is neither the largest nor (at ten months old) the newest! No doubt about it, then, the 'Offer' is a treasure house beyond any historical precedent.

Yet when we try to trace the path by which this cornucopia has come into being the task becomes formidable, although not quite impossible. There are three types of question. Firstly, there are issues of measurement and definition that make it hard to compare past and present offerings. Admittedly, we

may discount the so-called 'churn' whereby some line or other is discontinued while new ones are added. Census-takers are always obliged to count populations that are changing; a cut-off date can be chosen and the items on the shelves counted at that point. The existence of 'churning' is simply further evidence of consumer sovereignty. If consumers never wanted anything different, grocers could still put forward the limited offerings of past decades.

Or can we simply count items on the shelves? Consider a pot of marmalade. Is this a single item - one SKU or stock-keeping unit? Perhaps not, since it is possible to buy orange or lemon marmalade. Is a pot of orange marmalade, then, a single SKU? Again, perhaps not, since it is possible to select fine cut or thick cut. (And, as it happens, to select many further sub-varieties, quite apart from choosing among the products of different manufacturers). Surely, though, the warehouse can tell us what degree of splitting or lumping is involved, what definitions are actually being used at a given date? Maybe so: but the problem in writing a history is that past figures on SKUs do not specify the definitions then used. We cannot be sure that the same distinctions were being made throughout the industry at all periods, though the data from Coles Myer which form a substantial part of the table below are more secure.

A second question is what benchmark period should we choose? Which previous period is the appropriate contrast with

the profusion of the late 'nineties? After all, no-one would be surprised to be told that a store today contains infinitely more lines than in 1915, or the Depression, or the period of regulation and price control that lasted until the mid-fifties.

As it happens, the answer to a third question determines the answer to the second. What actual historical information can we use? The answer is precious little, and what there is does not stretch far back into the past or refer to many years or runs of years. Nor does the vague classification of types of store for which numbers of lines are sometimes cited incline one to believe that like is always being compared with like.

However the numbers are clearly not random; even the following brief table makes it plain that the Offer has swollen over time, that the introduction of supermarkets was responsible for an enormous extension of choice, and that the scale of recent changes has been positively gargantuan. It should also be taken into account how much value is now added to many of the lines on sale by way of the cleaning, packing and preparing of food, increasingly food that is fresh. Items on offer are more numerous than formerly. They are also different. They are better.

Grocery product lines on offer

<u>Date or period</u>	<u>Class of store</u>	<u>Number of lines</u>
1947	Traditional grocery	400
1950s	Coles 200-700 m ² stores	1,200
1960s	Coles standard stores (1000 -1500 m ²)	1,500 -2,500
circa 1969	Franklins	4,500
	Coles large New World supermarkets	5,000
1970	Typical Supermarket	c8,000
1975	Typical Supermarket	c12,000
circa 1980	Traditional grocery	under 1,000
	Stonehams' Limited Assortment stores	2,000
late 1980s	Coles and Woolworths	6,000 -7,000
	Franklins	up to 10,000
	Coles Super K Hypermarts (4500 - 5000 m ²)	10,000 -12,000
1992	Warehouse supermarkets	c.11,000
	Coles and Bi-Lo smaller supermarkets	8,000 -10,000
	Coles and Bi-Lo larger supermarkets	15,000
1996	ASI (Aust. Supermarket Institute) average figure	25,000
1997-1998	ASI	30,000
1990s	Coles supermarkets of 2500-4000 m ²	15,000 -25,000
	Coles large supermarkets (5000 m ²)	35,000
late 1990s	Coles largest supermarkets	over 40,000

[Sources: Various, including Coles own data]

Store sizes and formats

The most straightforward measure of the capacity of retail stores is floor area. At any given date stores of a range of sizes were being built; typical ranges are cited below. The figures

amply demonstrate the upward trend in modal (the commonest) size of store ever since the late 1950s. However stores are increasingly being designed to suit particular locations, often inner city ones, and are no longer necessarily expanding in sheer area. All sorts of formats exist to sell groceries, from food barns (warehouses) and half-case stores to delis and convenience stores (like the 7 Elevens that first opened in Oakleigh, Victoria, in 1977).

The figures of supermarket floor area can give only an impression of how this has grown, because, while there is now an international standard definition of a supermarket in terms of selling area and commodities sold, 'these technical definitions do not necessarily correspond at all to the manner in which retailers have, in the past, utilised the term 'supermarket' [Humphery, p.213].

In addition, the 'densing up' of stock on the shelves during the 1990s needs to be taken into account - in other words, floor area in square metres greatly under-represents the scale of recent developments.

Coles Myer stores

[Floor space in square metres]

Small grocery-only stores

1958 -1963 200-700

Standard supermarkets

1960-1966	1000 -1600 (a few larger)
1966-1971	2000-2400 (a few larger and smaller)
1971-1980	2000-3000
1980-1985	2400-3000
1985-1990	3800-5000

Extra stores

(partly groceries)

1987-1990 4300-5300

Mini X stores

1965-1982	2000-3000
1982-1990	3000-4000

Extended range stores

1964-1970	most 3000-3500
1971-1980	most circa 3000
1980-1984	most 3200-3800
1984-1990	most over 4500
1991-1998	most 2500-3500
1999	two 5000 opening
Express stores in CBDs	700-1400

[Source: Construction Department, Coles Myer]

Technological Innovation

Little is more obvious than that the task of providing food at the retail level involves a substantial feat of logistics. As many as 55 or 60 separate operations may be needed to take a fresh grocery item from the field to a Distribution Centre, wrap and process it, and put it on the shelf. To carry out many of these operations, modern companies depend on advanced technologies. Products could not be assembled on the present scale, kept in good condition, kept track of, priced, wheeled to the check-out, or scanned and sold without a mass of equipment. Much of this equipment is very new. All of it is constantly upgraded, to say nothing of the 'permanent revolution' that takes place in computer software.

We need pick out only a handful of the technologies in use, because (once more) it takes only a few to reveal how much the industry has progressed during present lifetimes. As an indication, let us consider the matter of wrapping. There is a long history of using all sorts of paper, including greaseproof paper, for this purpose. The Depression and war years commonly obliged retailers to use old newspapers, which was not popular with customers and was abandoned as soon as possible. Although cellophane had been introduced in 1910, tougher forms of plastic film fortunately became available by the time self-service was generally adopted. Cellophane would

have been too fragile for extensive use by customers doing their own wrapping (early customers were inclined to wash it for re-use). Another important innovation in wrapping, this time in the late 'fifties, was the continuous perforated roll of see-through plastic that allowed customers to serve themselves with fruit and vegetables.

Two types of modern technology seem absolutely outstanding. One is refrigeration: without it no-one could hope to assure product quality and freshness through Australia's summer or, in the Queensland tropics, at any time of year. The ravages of heat, moisture and insects that had made canning food an attractive option made refrigeration a compelling one. It is interesting to note that when Hordern's Food Hall in Sydney was remodelled in 1932 refrigerated cases 200 feet long were installed for cooked and pre-cut meat. And as an example of the speed of change that was possible when there was a good thing going, it is even more interesting to note that the New South Wales Pure Foods Act had to be amended in 1934 because so many retailers not registered as butchers had already caught on and were selling meat from refrigerators in forms only legally permitted to butchers.

The other obviously significant technology is computerisation, which is much more recent. Woolworths first installed an IBM computer for which it had paid 250,000 pounds in 1961. The first fully electronic grocery ordering system was

established by the Foodland banner group in 1974. The industry has moved on apace from those points, especially since the universal adoption of bar-coding. The thousands upon thousands of individual items sold every day could not have been monitored, re-ordered and accounted for with any previous technology.

Coles was the first grocery chain to instal EFTPOS and now provides this service at all 6,000 checkouts. The most astonishing feature is the resultant banking service: every year customers withdraw a total of \$2 billion in cash.

Another attractive innovation is easily forgotten. This is air-conditioning. Cool air made entering shops a pleasurable, or at any rate a highly acceptable, activity for customers, especially when many fewer homes and cars were themselves air-conditioned. Some leading clothing stores in Sydney had been air-conditioned by 1935 but once again the war slowed or deferred a desirable development. Retail stores in general did not begin to be air-conditioned until the 1950s. Since then air-conditioning has become the norm and is simply taken for granted. It is as good a marker as any of the extent of progress.

CONCLUSIONS

In an advanced country, retail grocery is always evolving. Consumer tastes change, and, as we have seen, never faster

than at the present day. The possibilities of unheard-of additions to grocery offerings constantly expand. Methods and technologies continually alter and facilitate the giant game of risk-taking that supplying the market involves - one in which a sizeable section of the community is nevertheless willing to participate. Coles Supermarkets employs 53,512 people nationally and the Coles Myer group to which the company belongs has over 320,000 shareholders of whom 240,000 (75 per cent.) are small shareholders with fewer than 1,000 shares.

The risks that retailers undertake to match supply and demand are socially beneficial. Whatever goods are stacked on the shelves, the customer is nevertheless free to walk away from them. Successful supermarkets do not necessarily capture all of a locality's trade. Specialist shops may flourish almost in their shadow. At Donvale, for example, a nationally-recognised butcher's shop and a thriving florist are located right outside Coles' supermarket. During the twentieth century, free choice has been hampered in Australia only during the Depression, wartime, and the aftermath of the Second World War. There was a short spell during the 'seventies and 'eighties when the supermarket chains began to underestimate the growing elaboration of their customers' tastes. Subsequently, stores have made big efforts, akin to those in earlier experimental decades like the 'twenties, to anticipate and even lead demand.

There are four ways of anticipating the market: sheer experimentation; intuition, which is not to be scorned since retailers are customers and members of society themselves; trend-spotting via demographic data and opinion surveys; and imitating the overseas industry. The last point warrants comment. Almost all the retail pioneers in Australia visited the United States and Europe, including Britain, to study retailing. G. J. Coles himself did so before opening his shop in 1914. Overseas tours by staff members have continued and over the years many American practices, in particular, have been introduced as a result. This is a beneficial part of the history of Australian retailing and not a cause of shame.

The USA and Britain are larger but culturally congruent societies. The size of their markets and retail trade means they are understandably likely to develop first. Australian grocers do their own community a service when they introduce 'best practice' here, whatever its geographical origin. They are creating positive externalities for the consumer. Other countries, even some rich ones in the OECD, have not invariably developed retailing to a comparable pitch. The Mom-and-Pop stores in Japan are notoriously inefficient. The cramped shops in Germany that are nicknamed Tante Emma Laden (Aunt Emma Shops) are like squeezing back into the Australia of the 1950s. The German Shop Closure Law of 1956, though relaxed a little in recent years, is recognised as the source of 'massive inconvenience to millions' [Ardagh, pp.208-209]. The actual

improvements to formats, display and business methods being made in Australia in the 1990s have persuaded foreign grocers to come here on fact-finding tours. For instance, groups of grocers from all over the world visit the Coles Express Store in central Melbourne. It is understood that another company is building what is virtually a replica Coles Express Store in Auckland, New Zealand.

During the Depression of the 1930s Coles continued to sell at the lowest possible prices, earning the name of 'the stores that helped reduce the cost of living' - as Collins remarks [p.8], 'when it was sorely needed.' Moreover no member of Coles staff lost his or her job. This is entirely congruent with modern practice, which sees the real price of a market basket of groceries continue to fall and Coles Myer making every effort to provide its staff with permanent jobs.

Take prices. The extraordinary expansion of the Offer has not cost the consumer more. In real terms, food costs less than it did 25 years ago. Coles calculates that in 1972 it took the average wage earner almost four and a half hours to earn enough to buy a basket of 15 food items, whereas by 1998 buying the same basket took only three hours and twenty minutes - a fall of 26 per cent.

Next, take career prospects for staff. Coles is ensuring that work in the retail grocery trade is no residual or transient

occupation. As the grocery business becomes more complicated it is vital to train people well and moreover to train the best of them formally. Young people who enter the firm are very actively helped to work their way up to the topmost levels of management. They are supported financially if they show the ability to undertake management education, including at the MBA level. They are encouraged to remain with the company, which wishes to reduce turnover and retain their commitment, knowledge and skills.

These changes are exemplified at Coles' newest store, the ultra-modern Langwarrin store in Victoria, where deregulation of shop trading hours means round-the-clock service can be provided, seven days a week. Casuals account for only one per cent. of the total hours worked. Part-time staff work almost one-quarter of the total, but as permanent employees. Permanent full-time employees work the remaining 75 per cent. of the time. The staff includes 29 retail trainees and 33 management trainees, together with an in-store trainer.

Langwarrin represents the future of food retailing for Coles, unless the (almost) unimaginable happens and direct selling comes to replace supermarkets altogether. Direct selling is already being introduced overseas, for example in New Zealand and some Asian countries, and Woolworths has introduced it in Sydney. Coles Myer, too, is developing selling over the Internet with a trial in selected Melbourne suburbs in

May, 1999. Customers will be able to order electronically, sorting their grocery lists whichever way they like - by nutritional content, cost per kilogramme, or from recipes, that is to say, building up meals by clicking on the ingredients. The software, which has been devised in association with the American company, Peapod, can of course retain the lists and refill orders automatically, until such time as the customer wishes to add or delete an item.

Since the order is known in advance, produce can be delivered to the customer's home fresh from the market. Home delivery will however be very different from the old days; a single delivery will be sufficient and there will be no need to wait for a succession of boys bicycling up the driveway. Coles Myer has arranged to employ part of the Australia Post fleet of vans and modern software in each van will calculate the best route to the next customer's address.

Writings on the history of retailing occasionally contain grumbles about the very notion of choice. This may be fashionable in some quarters of social science but in the palatial modern supermarket it is distinctly perverse. As with worries about the deskilling of grocers and housewives by early self-service stores and supermarkets, the proof of the pudding is clear from the industry's subsequent record and the consumer's reciprocal willingness to embrace the available choice. There was nothing more skilful in the grocer of 1950 supplying and the

purchaser selecting his or her groceries from 1,000 or 1,500 lines than there is today in providing or choosing among 40,000.

'The infrequent supermarket shopper is becoming harder to find', remarks A. C. Nielsen's 1998 survey, The Way We Shop.

Almost one-third of grocery shoppers claim to visit a supermarket three to six times per week. No-one could take this to mean that consumers dislike the choice that has been spread before them.

Acknowledgements & Sources

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