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CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

RETAIL MERCHANDISE TRADE

IN

OTTAWA

1936

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1937

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# CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS.

## Retail Merchandise Trade in Ottawa, 1936

(Population: 1931 Census, 126,872)

Results of a special survey of retail trade in Ottawa recently completed by the Internal Trade Branch of the Bureau of Statistics show a retail business for the city during 1936 of more than \$53,000,000. There were 1,593 stores last year with \$53,024,600 sales compared with 1,499 stores and \$59,564,500 sales in 1930, the only other year for which complete statistics are available. An estimate of the total trade for 1933, based upon a less exhaustive survey made on the sampling principle, is placed at \$42,000,000. Thus, while the dollar value of retail trade last year was still 11 per cent below the 1930 level, it was more than 26 per cent above the low point reached in 1933.

Variations in the dollar value of retail trade from year to year reflect not only differences in the actual volume of merchandise purchased but also changes in price levels. The Bureau's Retail Price Index reveals a 21.6 per cent decline in prices in 1936 compared with 1930. Although these price indexes are not so constructed as to make an exact comparison with retail sales possible, it is evident that the consumption of goods in Ottawa in 1936 equalled or exceeded that in the earlier period.

Sales in 1936 relative to 1930 varied widely for different kinds of business, being highest for those stores dealing chiefly in necessities or staple lines of merchandise and lower for those lines of business handling luxury items and durable consumer goods and which suffered the greatest decline during the depression years. Dollar value of sales for the food group of stores was only 7 per cent lower in 1936 than in 1930, a decrease more than accountable for by the difference in food prices which averaged 24 per cent lower last year than in the earlier period. A considerable expansion in the quantities of food products consumed is thus evident. On the other hand, sales for the building materials group were still 28 per cent lower than in 1930; the furniture and household group was down 27 per cent, and jewellery store sales were down 22 per cent.

Every effort was made to secure comparability in these retail trade statistics for 1930 and 1936. But changes in the type of business carried on by some firms have necessitated their allotment to a different kind-of-business classification in 1936 than in the earlier year. Confectionery stores and fruit and vegetable markets have added grocery items to their stocks and, although not all such stores known to carry grocery items have been assigned to the grocery store classification, the transfer has been made where it was thought that grocery sales formed the larger proportion of the business. Grocery stores which have added meat counters have been transferred to the combination store classification. Stores have gone out of business and new enterprises have commenced. Percentage changes in sales for detailed kind-of-business classifications must be considered in the light of these facts and not necessarily as indicative of the trend in sales of stores which have continued in the same kind of business throughout the period.

The food group, with 668 stores and \$11,569,800 sales, occupied first place in the retail trade last year. Included in the food group were 138 confectionery stores with \$819,400 sales and 63 fruit and vegetable markets with \$869,700 sales. There were 222 straight grocery stores with an annual business of \$3,034,500. Combination stores (groceries and meats) numbered 132 and had \$5,239,100 sales. There were also 64 meat and fish markets with \$1,120,700 sales. Transition of grocery stores and meat markets to the combination store type resulted in declines of 46 per cent and 34 per cent in sales below 1930 for the two more specialized types of food stores and a corresponding increase of 97 per cent in the business transacted by combination stores. Sales for the three main classes of food stores combined were 6 per cent lower in 1936 than six years ago.





In addition to the sales made by the 668 stores in the food group, retail sales of manufacturing bakeries totalled \$1,410,520 last year. Retail sales of manufacturing dairies totalled \$1,576,900 and sales of milk and cream by producer-distributors were estimated at another \$580,000. No information is available to show the value of sales made at the two municipal markets.

The general merchandise group comes second in point of view of value of sales. Department stores and variety stores form the two important classifications in this group. There were 8 department stores in Ottawa last year with \$7,902,200 sales, a decline of 22 per cent below the business transacted by ten stores six years ago. Variety stores increased in number from 6 to 10 during the same period with a consequent increase in sales from \$1,948,600 in 1930 to \$2,026,200 in 1936.

The automotive group included 146 establishments with \$7,637,900 sales. There were 20 motor vehicle dealers whose annual business, including receipts from all sources, totalled \$4,795,600 last year. This represents a decrease of 21 per cent in business below the amount recorded for motor vehicle dealers six years ago. There were 75 filling stations last year compared with 52 in 1930 and sales were up 25 per cent in value, an advance which, on account of the decrease in retail prices, considerably underestimates the increase in gasoline consumption. Motor vehicle registrations show that there were 20,222 vehicles registered in Ottawa last year compared with 16,148 in the earlier period. In addition to the 75 filling stations, there were 32 garages whose activities combined sales and services but in which service receipts formed less than 50 per cent of the total income. These had total receipts of \$642,900. There were also 17 shops specializing in accessories, tires and batteries and these had \$486,900 sales.

The apparel group comprised 177 stores for which sales were \$5,257,000 or 13 per cent below the corresponding amount for 1930. Stores specializing in men's and boys' clothing and furnishings numbered 59 with \$1,553,700 sales, a decrease of 18 per cent from 1930. There were 81 stores specializing in women's and children's apparel and accessories, hats and furs or fur goods and sales for these last year were \$2,191,000 or about 3 per cent below the 1930 figure. The apparel group also includes 28 shoe stores with \$750,400 sales. Clothing and shoes are sold in department stores as well as in specialty stores so that figures for the apparel group do not cover the total expenditures on clothing items.

The furniture and household group comprised 49 stores whose sales last year were \$2,240,200 or 27 per cent below the 1930 figure. Percentage changes between the two years under review for individual lines of business within the group show wide differences, due largely to changes in the classes of merchandise carried by some firms, necessitating their transfer from one kind-of-business classification to another for the two trade surveys. It must be remembered in this case also that furniture, radios and electrical appliances are also sold in department stores so that the sales shown for the furniture group do not represent the total turnover in these commodities.

Retail hardware stores did \$867,200 worth of business last year, a decline of 18 per cent from 1930. There were 81 restaurants, cafeterias and eating places (exclusive of hotel dining rooms) and these did a total business valued at \$1,445,100. Retail coal and wood yards did \$3,481,800 worth of business last year compared with \$3,477,000 in 1930. Drug stores numbered 71 with \$1,542,900 sales and there were 24 jewellery stores with \$797,500 sales.

Chain Stores.--Chains transacted a smaller proportion of the retail trade in Ottawa in 1936 than in former years. Last year, 62 different chain store companies operated a total of 168 stores with \$9,660,900 sales. This amount formed 18.2 per cent of the total business of all retail stores. In 1930, there were 69 different chain companies with 197 stores whose sales amounted to \$13,505,100 or 22.7 per cent of the total trade for that year.

In the food retailing field there were 5 chain companies in 1936 with 52 stores and \$3,135,000 sales and these transacted 33.4 per cent of the total business of all grocery, combination stores and meat markets combined. In 1930, there were 6 chains with 76 stores and \$3,696,200 sales and the ratio of chain to total sales was 37.1 per cent. Few chain units of the purely grocery type remain, a gradual transition to the combination store type having taken place. There were 54 such stores in 1930 and these transacted 39.3 per cent of the business of all grocery stores that year. In 1936 there were only 14 grocery chain units with 11.5 per cent of the total grocery store trade. On the other hand, the number of chain units of the combination store type increased from 22 in 1930 to 38 in 1936 although a similar development in the independent stores resulted in a slight reduction in the chain ratio for this type from 56.2 per cent to 53.2 per cent.





Change from company-operated to leased-station type resulted in a decrease per cent to 40.1 per cent in the proportion of filling station business trans- mains. A further transfer of management to lessees in the late fall of 1936 moves filling stations from the chain store field.

Chains in the women's apparel and accessories group declined in importance, chain to total sales decreasing from 22.2 per cent in 1930 to 11.1 per cent last . The variety store continues a typical chain store organization.

The chain store classification includes the Ottawa stores of all organizations operating four or more retail units exclusive only of department stores. All department stores are excluded from the chain category irrespective of the number of units under one ownership or control.

There were 78 retail stores in Ottawa last year belonging to firms with two stores and there were 29 more belonging to three-store multiples. Together, these two- and three-store multiples had \$7,068,300 sales or 13.3 per cent of the total retail trade of the city. In 1930 these multiple firms transacted 17.5 per cent of the total business.

The position of voluntary chains in the city retail trade remains unchanged from 1930, a slight reduction in the number of single independent food stores belonging to these groups being offset by an increase in the number of drug stores. There were 51 single independent stores in voluntary chains in both years and the proportion of the total trade which they secured remained constant at 2.4 per cent.

In the grocery and combination store field single stores in voluntary chains accounted for 14.9 per cent of the total trade in 1930 compared with 11.6 per cent last year. But there were also two multiple firms associated with voluntary chains in 1936 and, although sales for these cannot be disclosed, it is evident that, were their sales combined with those of the single independents, the proportion of the food store business transacted by all stores belonging to these buying groups would show but little change.

The wide range in the extent of operations of different stores is well known. There were 123 stores in Ottawa whose annual sales for 1936 were less than \$2,500 and there were 201 with sales between \$2,500 and \$5,000. At the other extreme in size, there were 13 large firms whose annual business exceeded half a million dollars. About one-third of all the stores do between \$10,000 and \$30,000 worth of business annually and these account for about 17.7 per cent of the total sales of all stores. The distribution according to size of business varies widely for different kinds of business. Details are given in the attached tables.







Table 1.--Retail Merchandise Trade in Ottawa, by Kinds of Business, 1930 and 1936

Kind of Business	Number of Stores		Net Sales		
	1930	1936	1930	1936	% change
TOTAL, ALL STORES .....	1,499	1,593	59,564,500	53,024,600	- 11.0
Food Group .....	678	668	12,384,000	11,569,800	- 6.6
Bake shops and caterers(1) .....	15	19	219,000	132,600	- 39.5
Candy and nut stores .....	10	9	213,800	157,600	- 26.3
Confectionery stores .....	159	138	911,500	819,400	- 10.1
Dairy products dealers(2) .....	5	4	258,900	108,400	- 58.1
Fruit and vegetable stores .....	69	63	738,900	869,700	+ 17.7
Food stores .....	410	418	9,964,600	9,394,300	- 5.7
Grocery stores (without meat) .....	273	222	5,592,800	3,034,500	- 45.7
Combination stores (groceries and meats) ..	64	132	2,665,000	5,239,100	+ 96.6
Meat and fish markets .....	73	64	1,706,800	1,120,700	- 34.3
Ice cream stores .....	-	12	-	39,300	-
Other food stores .....	10	5	77,300	48,500	- 37.3
General Merchandise Group .....	37	29	12,715,500	10,255,900	- 19.3
Department stores .....	10	8	10,136,300	7,909,200	- 22.0
Dry goods stores .....	14	8	354,600	215,300	- 39.3
General merchandise stores .....	7	3	276,000	105,200	- 61.9
Variety stores .....	6	10	1,948,600	2,026,200	+ 4.0
Automotive Group .....	121	146	8,707,800	7,637,900	- 12.3
Motor vehicle dealers .....	20	20	6,037,800	4,795,600	- 20.6
Accessories, tires and batteries .....	20	17	415,800	486,900	+ 17.1
Garages (including sales and services)(3) .....	26	32	824,800	642,900	- 22.1
Filling stations .....	52	75	1,353,200	1,686,800	+ 24.7
Other automotive establishments .....	3	2	76,200	25,700	- 66.3
Apparel Group .....	180	177	6,050,700	5,257,000	- 13.1
Men's and boys' clothing and furnishings .....	34	34	1,427,400	1,162,900	- 18.5
Custom tailors and made-to-measure clothing ...	29	25	464,500	390,800	- 15.9
Family clothing stores .....	10	9	889,000	761,900	- 14.3
Women's ready-to-wear stores .....	28	34	1,453,500	1,275,300	- 12.3
Hosiery, corsets and lingerie .....	4	7	132,600	154,100	+ 16.2
Millinery stores .....	22	16	138,200	135,500	- 2.0
Furriers - fur shops .....	9	16	462,700	572,400	+ 23.7
Other apparel stores .....	9	8	74,100	53,700	- 27.5
Shoe stores .....	35	28	1,008,700	750,400	- 25.6
Building Materials Group .....	47	57	2,836,300	2,039,000	- 28.1
Hardware stores .....	18	20	1,053,400	867,200	- 17.7
Lumber and building material dealers .....	4	6	1,038,100	607,700	(X)
Electrical shops (without radio) .....	11	14	324,100	191,900	(X)
Paint and glass stores .....	14	17	420,700	372,200	(X)
Furniture and Household Group .....	44	49	3,058,200	2,240,200	- 26.7
Furniture stores .....	9	14	538,900	820,300	+ 52.2
Household appliance stores .....	11	8	818,000	272,300	- 66.7
Other home furnishings and appliances .....	12	17	353,800	374,300	+ 5.8
Radio and music stores .....	12	10	1,347,500	773,300	- 42.6
Restaurants, Cafeterias and Eating Places(4) ..	73	81	1,627,300	1,445,100	- 11.2
Other Retail Stores .....	288	357	12,070,700	12,440,600	+ 3.1
Book stores and news dealers .....	19	25	472,800	334,700	- 29.2
Coal and wood yards (including ice) .....	34	39	3,477,000	3,481,800	+ .1
Drug stores .....	65	71	1,677,100	1,542,900	- 8.0
Florists .....	10	13	319,400	250,500	- 21.6
Gifts, novelties, toys, cameras, etc. ....	6	4	152,300	120,500	- 20.9
Jewellery stores .....	28	24	1,017,200	797,500	- 21.6
Office, school and store supplies and equipment	16	20	884,000	836,600	- 5.4
Sporting goods stores .....	5	7	207,400	228,900	+ 10.4
Tobacco stores and stands .....	44	44	736,300	601,600	- 18.3
Miscellaneous classifications (combined)(5) ...	61	110	3,127,200	4,245,600	+ 35.8
Secondhand Group .....	31	29	114,000	139,100	+ 22.0

- (1) In addition, retail sales of manufacturers' bakeries totalled \$1,410,520 in 1936.
- (2) In addition, retail sales of manufacturing dairies and producer-distributors of dairy products totalled \$2,160,400 in 1936. (Comparable figures for 1930 are not available.)
- (3) In addition, there were 44 service garages with \$364,200 receipts in 1930 and 60 similar establishments with \$351,600 receipts in 1936.
- (4) Exclusive of hotel dining rooms or cafeterias.

(For additional notes, see next page)



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	Nov 26	...		...	
	Nov 27	...		...	
	Nov 28	...		...	
	Nov 29	...		...	



Footnotes to Table 1 (Continued) --

(5) Includes Government liquor stores, retail sales of breweries and brewers' warehouses in addition to a number of other lines of trade. Figures for 1936 also include sales of beverage rooms operated in conjunction with hotels.

(X) Due to difference in methods of reporting in the two years, sales for 1930 and 1936 for this classification are not strictly comparable.

Note: The reclassification of a few firms as between retailers and other types of business has necessitated some minor changes in the 1930 figures from those given in the Census Report for 1931.

Table 2.--Summary of Retail Chains, by Kinds of Business, 1930 and 1936

Kind of Business	Number of Chains	Number of Chain Stores	Chain Sales	Total Sales, All Stores	Ratio Chain Sales to Total Sales
			\$	\$	%
<u>1930</u>					
TOTAL, ALL CHAINS .....	69	197	13,505,100	59,564,500	22.7
Food store chains(1) .....	6	76	3,696,200	9,964,600	37.1
Variety store chains .....	4	6	1,948,600	1,948,600	100.0
Filling station chains(2) .....	9	41	964,100	1,353,200	71.3
Women's apparel and accessories chains(3) .....	7	8	501,200	2,261,100	22.2
<u>1936</u>					
TOTAL, ALL CHAINS .....	62	168	9,660,900	53,024,600	18.2
Food store chains(1) .....	5	52	3,135,000	9,394,300	33.4
Variety store chains .....	6	10	2,026,200	2,026,200	100.0
Filling station chains(2) .....	6	30	675,600	1,686,800	40.1
Women's apparel and accessories chains(3) .....	4	5	242,500	2,191,000	11.1

(1) Includes grocery stores, combination stores and meat and fish markets.

(2) Figures in this classification relate only to company-operated retail stations. Leased stations are not included.

(3) Includes all stores specializing in women's apparel and accessories.





Table 3.--Retail Merchandise Trade in Ottawa, by Types of Operation, 1930 and 1936

Type of Operation	1930			1936			Per Cent Change in Sales 1930-1936
	Number of Stores	Net Sales		Number of Stores	Net Sales		
		Amount	Per cent of total		Amount	Per cent of total	
TOTAL, ALL STORES	1,499	\$ 59,564,500	100.0	1,593	\$ 53,024,600	100.0	- 11.0
Single store independents .....	1,142	34,055,900	57.2	1,267	35,018,800	66.0	+ 2.8
Single stores (voluntary chains) .....	51	1,456,000	2.4	51	1,276,600	2.4	- 12.3
Two-store multiples(1)	78	5,022,000	8.4	78	2,722,100	5.1	- 45.8
Three-store multiples(1) .....	23	5,419,200	9.1	29	4,346,200	8.2	- 19.8
Corporate Chains, Total	197	13,505,100	22.7	168	9,660,900	18.3	- 28.5
Local chains ....	24	941,700	1.6	29	551,200	1.1	- 41.5
Provincial chains	27	3,324,800	5.6	23	2,325,700	4.4	- 30.0
Sectional chains.	50	3,031,000	5.1	45	1,868,500	3.5	- 38.4
National chains .	78	5,199,700	8.7	56	4,147,400	7.8	- 20.2
Manufacturer-controlled .....	18	1,007,900	1.7	15	768,100	1.5	- 23.8
Other types of operation .....	8	108,300	.2	-	-	-	-

(1) In 1936 one two-store multiple and one three-store multiple were also associated with voluntary chains.

Table 4.--Grocery and Combination Stores in Ottawa, by Types of Operation, 1930 and 1936

Kind of Business and Type of Operation	1930				1936			
	Number of Stores	Net Sales			Number of Stores	Net Sales		
		Amount	Per cent of total	Average sales per store		Amount	Per cent of total	Average sales per store
Grocery and Combination Stores .....	337	\$ 8,257,800	100.0	\$ 24,504	354	\$ 8,273,600	100.0	\$ 23,372
Single store independents ..	197	2,915,400	35.3	14,799	230	3,255,700	39.4	14,155
Single stores, voluntary chains .....	45	1,231,300	14.9	27,362	37	963,000	11.6	26,032
Two- or three-store multiples(1) .....	19	414,900	5.0	21,837	35	919,700	11.1	26,277
Corporate chains .....	76	3,696,200	44.8	48,634	52	3,135,000	37.9	60,288
Grocery Stores .....	273	5,592,800	100.0	20,486	222	3,034,500	100.0	13,669
Single store independents ..	172	2,212,400	39.6	12,863	179	2,008,700	66.2	11,222
Single stores, voluntary chains .....	41	1,073,000	19.2	26,171	24	554,200	18.3	23,092
Two- or three-store multiples	6	109,300	1.9	18,217	5	123,300	4.0	24,660
Corporate chains .....	54	2,198,100	39.3	40,706	14	348,300	11.5	24,879
Combination Stores .....	64	2,665,000	100.0	41,641	142	5,239,100	100.0	39,690
Single store independents ..	25	703,000	26.4	28,120	51	1,247,000	23.8	24,451
Single stores, voluntary chains .....	4	158,300	5.9	39,575	13	409,000	7.8	31,462
Two- or three-store multiples(1) .....	13	305,600	11.5	23,508	30	796,400	15.2	26,547
Corporate chains .....	22	1,493,100	56.2	68,095	38	2,786,700	53.2	73,334

(1) Figures for 1936 include two multiple firms belonging to voluntary chains.





Table 5.--Retail Stores in Ottawa Classified According to Amount of Annual Sales, 1936

Amount of Annual Sales	ALL STORES(1)			Confectionery Stores			Fruit and Vegetable Stores			Grocery Stores		
	Number of Stores	Net Sales		Number of Stores	Net Sales		Number of Stores	Net Sales		Number of Stores	Net Sales	
		Amount	Per cent of total		Amount	Per cent of total		Amount	Per cent of total		Amount	Per cent of total
ALL STORES, TOTAL .....	1,550	\$ 51,417,000	100.00	138	\$ 819,400	100.00	63	\$ 869,700	100.00	222	\$ 3,034,500	100.00
Stores Having Sales Of --												
Less than \$2,500 .....	123	277,200	.34	20	28,300	3.45	1	2,400	.28	26	34,600	1.14
\$2,500 - \$4,999 .....	201	721,000	1.40	43	150,700	18.39	14	47,400	5.45	34	125,700	4.15
\$5,000 - \$9,999 .....	230	2,400,600	4.67	54	388,200	47.38	19	131,100	15.07	59	405,800	13.37
\$10,000 - \$19,999 .....	347	4,892,900	9.52	21	252,200	30.78	16	233,900	26.89	51	710,700	23.42
\$20,000 - \$29,999 .....	174	4,189,500	8.15	-	-	-	6	135,200	15.55	29	699,400	23.05
\$30,000 - \$49,999 .....	174	6,686,100	13.00	-	-	-	5)	319,700	36.76	19	699,600	23.05
\$50,000 - \$99,999 .....	117	8,156,500	15.86	-	-	-	2)	-	-	3)	358,700	11.82
\$100,000 - \$199,999 .....	41	5,747,800	11.18	-	-	-	-	-	-	1)	-	-
\$200,000 - \$299,999 .....	11	2,565,500	4.99	-	-	-	-	-	-	-	-	-
\$300,000 - \$499,999 .....	10	3,874,400	7.54	-	-	-	-	-	-	-	-	-
\$500,000 and over .....	13	12,005,500	23.35	-	-	-	-	-	-	-	-	-

  

Amount of Annual Sales	Combination Stores			Meat and Fish Markets			Filling Stations			Drug Stores		
	Number of Stores	Net Sales		Number of Stores	Net Sales		Number of Stores	Net Sales		Number of Stores	Net Sales	
		Amount	Per cent of total		Amount	Per cent of total		Amount	Per cent of total		Amount	Per cent of total
ALL STORES, TOTAL .....	132	\$ 5,239,100	100.00	64	\$ 1,120,700	100.00	75	\$ 1,686,800	100.00	71	\$ 1,542,900	100.00
Stores Having Sales Of --												
Less than \$2,500 .....	1	2,400	.05	2	3,400	.30	1	1,500	.09	1	2,100	.14
\$2,500 - \$4,999 .....	3	12,700	.24	4	14,800	1.32	4	12,900	.77	-	-	-
\$5,000 - \$9,999 .....	11	82,900	1.58	22	145,300	12.97	10	81,700	4.84	7	51,600	3.34
\$10,000 - \$19,999 .....	31	444,500	8.48	16	223,900	19.98	26	389,600	23.10	31	459,100	29.76
\$20,000 - \$29,999 .....	23	548,300	10.47	9	215,200	19.20	16	399,000	23.65	20	475,800	30.83
\$30,000 - \$49,999 .....	28	1,143,200	21.82	8	313,800	28.00	14	503,000	29.82	8	271,200	17.58
\$50,000 - \$99,999 .....	26	1,731,800	33.05	3	204,300	18.23	4	299,100	17.73	4	283,100	18.35
\$100,000 - \$199,999 .....	8)	-	-	-	-	-	-	-	-	-	-	-
\$200,000 - \$299,999 .....	1)	1,273,300	24.31	-	-	-	-	-	-	-	-	-
\$300,000 - \$499,999 .....	-	-	-	-	-	-	-	-	-	-	-	-
\$500,000 and over .....	-	-	-	-	-	-	-	-	-	-	-	-

(1) In a few instances, sales were reported for groups of establishments rather than for individual units. Such establishments are excluded from the above classification according to amount of sales.

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