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DEPARTMENT OF TRADE AND COMMERCE

DOMINION BUREAU OF STATISTICS

INTERNAL TRADE BRANCH

SURVEY
of
CHAIN STORE SYSTEMS
in
CANADA

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1930

DEPARTMENT OF TRADE AND COMMERCE
DOMINION BUREAU OF STATISTICS - CANADA
INTERNAL TRADE BRANCH

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SURVEY OF CHAIN STORE SYSTEMS IN CANADA

This survey is the second made by the Dominion Bureau of Statistics on the subject of chain stores in Canada. It should be understood at the outset that the data contained herein does not purport to cover the entire chain store field in Canada. The inquiry has been conducted on a voluntary basis. In all, the Bureau's lists include more than 350 chain systems of which 210 made returns.

Number of Chains

Of the 210 chains from which returns were received grocery chains again led in point of numbers with 42 chains and 1,699 stores: 18 general, department and variety chains had 354 stores; 29 drug chains, 260 stores; 9 meat chains, 186 stores; 4 tobacco chains, 173 stores; 17 boot and shoe chains, 157 stores; 11 restaurant chains, 131 stores; and 12 bakery chains, 121 stores. Other chain systems varied from 12 to 108 stores.

Sales

Total sales in 1929 for the 210 chain systems amounted to \$256,129,974. This was equivalent to \$68,889 per store, and taking the estimated population of the Dominion in 1929 as 9,796,800 it worked out at over \$26.00 per capita. Sales by provinces were largest in Ontario where they reached \$137,682,696, or more than 50% of the total for all 210 chain systems.

Even if allowance be made for chains which were missed and those from which information could not be obtained for this year's inquiry, it is evident that the great bulk of the nation's retail merchandising is still done by independent stores. In the census of Trading Establishments taken by the Bureau in 1923 it was shown that sales for 60,181 retail establishments were \$1,642,103,468. If allowance be made for the fact that returns were not obtained from all establishments for reasons set forth in the census report and that there has been considerable growth between 1923 and 1930, it is probable that a current estimate of total retail sales of around \$2,000,000,000 is not far astray. It is estimated that if the 140 chains from which returns have not yet been received were included the total sales for all 350 would not exceed \$400,000,000, (not including sales of certain departmental stores having branch rather than chain systems). Since many which did not report were small concerns the latter figure is probably too high. It would seem that chain stores (exclusive of co-operative chains of independent stores) though doing an increasing proportion of the business of distributing commodities to the consumer, probably do less than 25% of this work at present.

This report does not include co-operative chains of independents but the business done by these concerns adds considerably to the sum total performed by chain organizations. Nevertheless, including these, it is probable that more than two-thirds of the retail distribution is still performed by independent concerns.

Sales of grocery and meat chains amounted to \$115,232,179, or almost 45% of total sales. In the 1923 census, 16,905 grocery and meat stores showed sales of \$319,676,823. The current figure may be estimated at approximately \$400,000,000. If allowance be made for non-reporting chains in the present inquiry the total sales by this type of chain would probably be well under \$150,000,000, hence independents (including co-operative and voluntary chains) do the bulk of the business in a field which has been more intensively exploited by chain organizations than any other.

Sales Outlets

An item of interest in the report is that pertaining to the number of sales outlets. The complete story of the distribution of commodities is not known until all outlets for the sales of each commodity are revealed. An attempt has therefore been made to enumerate the total number of merchandising outlets for each class of commodity in the

chain systems covered. A summary table shows the number for the Dominion and for each province, and more detailed tables show those in each chain store group classified according to commodity classes.

In all there were 11,896 merchandising outlets in the 210 chain systems, which is an average of over three for each separate store. There were 2,965 for foods and kindred products; 991 for cigars, tobacco, and smokers sundries; 428 for women's, misses', and children's clothing; 410 for house furnishings; 387 for drugs and drug sundries; and 378 for hardware. Outlets for other classes of goods numbered from 8 to 369.

Sales by Classes of Commodities

Sales according to commodity classes were largest for food and kindred products, amounting to \$140,732,928 which was almost 55% of the total sales of the 210 reporting chains. Next in order came women's, misses' and children's clothing, with sales amounting to \$10,743,621; men's clothing and furnishings, \$9,815,928; cigars, tobacco and smokers sundries, \$8,686,764; dry goods and notions, \$7,960,739; hardware, \$7,729,686; toilet articles and preparations, \$7,087,194; shoes and other footwear, \$6,529,593.

Food sales represented 54.9% of the total, women's, misses' and children's clothing 4.1%, men's clothing and furnishings 3.8%, cigars and tobacco 3.4%, dry goods and notions 3.1%, hardware 3.0%, toilet articles 2.7%, shoes and other footwear 2.5%.

TABLE NO.1 - NUMBER OF REPORTING CHAIN SYSTEMS AND STORE UNITS

Class of Chain	Number of Chains Reporting	Number of Stores by Provinces									Total Stores Reported for 210 Chains
		Prince Edward Island	Nova Scotia 7 Chains	New Brunswick 4 Chains	Quebec 49 Chains	Ontario 105 Chains	Manitoba 14 Chains	Sask- atchewan 7 Chains	Alberta 8 Chains	British Columbia 16 Chains	
Bakery Products	12	-	-	-	10	64	-	-	-	47	121
Boots and Shoes	17	-	1	4	44	99	1	-	1	7	157
Candy and Confectionery	7	-	-	-	30	57	11	1	1	6	106
Drugs and Chemicals	29	-	7	-	46	146	14	5	6	36	260
Dry Goods	3	-	-	-	4	8	-	-	-	-	12
Dyers and Cleaners	6	-	-	-	8	31	-	-	-	-	39
Furs	3	-	-	-	5	7	1	2	-	-	15
Furniture	5	-	-	-	65	15	-	-	-	3	83
General, Departmental, & Variety	18	2	20	7	98	156	13	21	12	25	354
Grocers	42	1	32	10	400	825	108	128	77	118	1699
Hardware	12	-	-	1	8	28	1	17	8	-	63
Men's Clothing and Furnishings	10	-	2	1	17	62	5	3	6	6	102
Musical Instruments and Radio	7	-	-	-	8	43	-	5	7	3	66
Meats, Fish and Poultry	9	-	4	3	11	107	1	2	29	29	186
Restaurants	11	-	-	-	36	83	3	-	-	9	131
Tobacco and Cigars	4	-	-	-	51	90	9	8	4	11	173
Women's Wear	11	-	1	2	27	46	6	5	8	13	108
Miscellaneous x	4	-	-	22	6	4	3	3	2	3	43
T O T A L	210	3	67	50	874	1371	176	200	161	316	3718

x Includes 4 Chains: Jewelry, stationery, tires, automobile accessories.

TABLE NO. II - TOTAL SALES IN CANADA BY CHAIN GROUPS - 1929

	Total Sales	% of Total
Bakery Products	\$ 2,178,483	0.8
Boots and Shoes	5,675,086	2.2
Candy and Confectionery	3,785,942	1.5
Drugs and Chemicals	12,915,808	5.0
Dry Goods	658,876	0.2
Dyers and Cleaners	1,751,090	0.7
Furniture	10,089,758	3.9
Furs	1,603,489	0.6
General and Variety	49,655,676	19.3
Grocers	104,223,178	40.7
Hardware	7,400,704	2.9
Men's Clothing and Furnishings	6,654,951	2.7
Musical Instruments and Radio	9,122,804	3.5
Meats, Fish and Poultry	11,009,001	4.3
Restaurants	13,045,670	5.1
Tobacco and Cigars	6,542,262	2.6
Women's Wear	5,075,346	2.1
Miscellaneous	4,741,850	1.9
T O T A L	256,129,974	

TABLE NO. III - PROVINCIAL SALES BY ALL CHAINS - 1929.

Province	Total Sales	% of Total
Nova Scotia and P.E.I.	\$ 5,608,201	2.2
New Brunswick	4,819,125	1.9
Quebec	56,489,703	22.0
Ontario	137,682,696	53.8
Manitoba	11,877,076	4.6
Saskatchewan	11,666,542	4.5
Alberta	10,664,704	4.2
British Columbia	17,321,927	6.8
T O T A L	256,129,974	

TABLE NO.IV.- CHAIN STORE SALES ARRANGED IN CLASSES OF COMMODITIES AND PERCENTAGES
OF TOTAL

Commodities	Amount of Sales	Percentage of Total
1. Antiques, Art Goods, Statuary and Gifts	\$ 457,959	.1788
2. Automobiles, Trucks, Tractors and Accessories	2,393,667	.9345
3. Batteries (storage)	89,587	.0349
4. Building Material	527,081	.2058
5. Cameras and Photographic Supplies	589,034	.2286
6. Cigars, Cigarettes, Tobacco and Smokers' Sundries	8,686,764	3.3915
7. Infants' Wear	1,739,665	.6792
8. Men's Clothing and Furnishings and Hats and Caps	9,815,928	3.8324
9. Women's, Misses' and Children's Clothing	10,743,621	4.1783
10. Drugs and Drug Sundries	6,274,907	2.4160
11. Dry Goods and Notions	7,960,739	3.1239
12. Electric Appliances and Supplies	1,350,454	.5285
13. Farm and Garden Equipment and Supplies	248,420	.0930
14. Fertilizers	11,975	.0046
15. Flowers, Wreaths, etc.	22,639	.0088
16. Food and Kindred Products	140,732,928	54.9455
17. Furniture	6,196,201	2.4191
18. Furs and Fur Goods	1,758,393	.6865
19. Gas Appliances and Supplies	44,513	.0173
20. Gasoline, Lubricating Oils and Greases	104,937	.0409
21. Hardware	7,729,686	3.0175
22. Hay, Grain and Feed	153,500	.0599
23. Heating and Plumbing Equipment and Supplies	734,685	.2868
24. House Furnishings	5,944,396	2.3209
25. Jewelry, Silverware, Clocks and Watches	2,464,419	.9621
26. Leather Goods, Bill Folds, Wallets, Purses, etc.	714,200	.2788
27. Luggage	58,211	.0227
28. Motor Cycles, Bicycles and Accessories	56,364	.0220
29. Musical Instruments and Accessories	5,395,271	2.1064
30. Office and Store Equipment	234,444	.0915
31. Optical Equipment	4,990	.0002
32. Paints, Varnishes, Glass and Painters Supplies	1,873,364	.7314
33. Professional and Scientific Instruments and Equipment	25,000	.0098
34. Radio and Radio Equipment	5,627,725	2.1972
35. Seeds, Bulbs, Nursery Stock, etc.	513,076	.2003
36. Shoes and other Footwear	6,529,593	2.5493
37. Sporting Goods	310,943	.1214
38. Stationery, Books and Magazines	3,935,975	1.5367
39. Stoves, Ranges, Heaters, etc.	1,219,083	.4759
40. Surgical and Hospital Supplies	214,520	.0837
41. Toilet Articles and Preparations	7,087,194	2.7670
42. Toys and Games	2,381,172	.9297
43. Wall Paper	260,567	.1017
44. Miscellaneous Merchandise	2,652,205	1.0355
45. Second Hand Merchandise	259,979	.1015
TOTAL		256,129,974

TABLE V.- NUMBER OF MERCHANDISE OUTLETS IN CHAIN STORE SYSTEMS, CLASSIFIED INTO COMMODITY CLASSES AND CHAIN GROUPS.

Type of Chain Store	Antiques, Art Goods, Statuary and Gifts	Automobiles, Trucks, Tractors & Accessories	Batteries (storage)	Building Material	Cameras and Photographic Supplies	Cigars, Tobacco & Smokers Sundries	Infants' Wear	Men's Clothing & Furnishings & Hats and Caps	Women's, Misses' & Children's Clothing	Drugs and Drug Sundries	Dry Goods and Notions	Electric Appliances and Supplies	Farm & Garden Equipment and Supplies	Fertilizers	Flowers, Wreaths, etc.
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Bakery Products	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Boots & Shoes	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Candy & Confectionery	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Drugs & Chemicals	-	-	-	-	224	234	-	-	-	263	-	9	-	-	14
Furniture	-	65	-	-	-	-	-	5	5	-	-	8	-	-	-
Fur Goods	-	-	-	-	-	-	-	-	11	-	-	-	-	-	-
General & Variety	263	22	22	3	-	168	278	175	289	93	329	144	-	-	43
Groceries	-	-	-	-	-	393	-	5	-	31	5	-	31	31	-
Hardware	-	13	-	29	-	-	-	-	-	-	-	27	25	7	-
Men's Clothing	-	-	-	-	-	-	-	102	-	-	-	-	-	-	-
Music Instruments & Radio	-	6	-	-	-	-	-	-	-	-	-	-	-	-	-
Meats & Poultry	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Restaurant	-	-	-	-	-	23	-	-	-	-	-	-	-	-	-
Tobacco	-	-	-	-	-	173	-	-	-	-	-	-	-	-	-
Women's Wear	-	-	-	-	-	-	-	6	108	-	-	-	-	-	-
Miscellaneous	9	28	22	11	-	-	-	-	11	-	-	-	22	11	-
Dyers & Cleaners	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Dry Goods	-	-	-	-	-	-	4	-	4	-	12	-	-	-	-
TOTAL	272	134	44	43	224	991	282	293	428	387	346	188	78	49	57

TABLE V.- NUMBER OF MERCHANDISE OUTLETS IN CHAIN STORE SYSTEMS, CLASSIFIED INTO COMMODITY CLASSES AND CHAIN GROUPS. - Cont'd.

Type of Chain Store	Food and Kindred Products	Furniture	Furs and Fur Goods	Gas Appliances and Supplies	Gasoline, Lubricating oils & Greases	Hardware	Hay, Grain and Feed	Heating and Plumbing Equipment and Supplies	House Furnishings	Jewelry, Silverware, Clocks and Watches	Leather Goods, Bill Folds, Wallets, Purses, etc.	Luggage	Motor Cycles, Bicycles & Accessories	Musical Instruments and Accessories	Office and Store Equipment
	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
Bakery Products	121	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Boots & Shoes	-	-	-	-	-	-	-	-	-	-	6	6	-	-	-
Candy & Confectionery	106	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Drugs & Chemicals	186	-	-	-	-	-	-	-	-	36	4	-	-	13	-
Furniture	-	83	5	5	-	-	-	-	77	8	-	8	-	70	15
Fur Goods	-	-	15	-	-	-	-	-	-	-	-	-	-	-	-
General & Variety	354	26	25	-	3	323	3	-	288	266	233	25	-	91	-
Groceries	1,779	-	-	-	-	-	43	-	-	-	-	-	-	-	-
Hardware	-	3	-	4	27	55	-	25	29	20	9	11	13	-	-
Men's Clothing	-	-	-	-	-	-	-	-	-	-	4	-	-	-	-
Musical Instruments & Radio	-	-	-	-	-	-	-	-	-	-	-	-	-	50	-
Meats & Poultry	266	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Restaurant	141	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tobacco	12	-	-	-	-	-	-	-	-	12	-	-	-	-	-
Women's Wear	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Miscellaneous	-	11	22	11	11	-	-	-	16	6	9	11	11	11	20
Dyers & Cleaners	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Dry Goods	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL	2,965	123	67	20	41	378	46	25	410	348	265	61	24	235	35

TABLE V.- NUMBER OF MERCHANDISE OUTLETS IN CHAIN STORE SYSTEMS, CLASSIFIED INTO COMMODITY CLASSES AND CHAIN GROUPS - Concluded.

Type of Chain Store	Optical Equipment	Paints, Varnishes, Glass and Painters' Supplies	Professional & Scientific Instruments & Equipment	Radio and Radio Equipment	Seeds, Bulbs, Nursery Stock, etc.	Shoes and other Footwear	Sporting Goods	Stationery, Books and Magazines	Stoves, Ranges, Heaters, etc.	Surgical and Hospital Supplies	Toilet Articles and Preparations	Toys and Games	Wall Paper	Miscellaneous Merchandise	Second Hand Merchandise	Total Outlets by Class of Store
	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	
Bakery Products	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	121
Boots & Shoes	-	-	-	-	-	157	-	-	-	-	-	-	-	-	-	169
Candy & Confectionery	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	106
Drugs & Chemicals	21	-	37	7	3	6	4	81	-	120	232	15	-	19	-	1,528
Furniture	-	3	-	70	-	-	3	-	76	-	-	3	-	68	8	585
Fur Goods	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	26
General Variety	158	255	-	22	153	57	22	249	-	-	280	300	-	114	-	5,076
Groceries	-	31	-	-	37	5	-	-	-	-	-	-	-	-	-	2,391
Hardware	-	63	-	33	12	-	42	-	34	-	-	7	9	6	-	505
Men's Clothing	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	106
Musical Instruments & Radio	-	6	-	66	-	-	6	-	-	-	-	-	-	6	-	140
Meats & Poultry	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	266
Restaurant	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	164
Tobacco	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	197
Women's Wear	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	114
Miscellaneous	-	11	-	22	-	-	-	9	22	-	-	9	11	6	-	343
Dyers & Cleaners	-	-	-	-	-	-	-	-	-	-	-	-	-	39	-	39
Dry Goods	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	20
TOTAL	179	369	37	220	205	225	77	339	132	120	512	334	20	260	8	11,896

TABLE VI.- NUMBER OF MERCHANDISING OUTLETS IN CHAIN STORE SYSTEMS BY PROVINCES AND BY COMMODITY CLASSES - 1929.

Commodity	Prince Edward Island	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta.	B.C.	Total Commodity Outlets
Antiques, Art Goods	2	16	5	67	130	10	13	9	20	272
Automobiles, Trucks, etc.	-	-	22	72	24	1	11	1	3	134
Batteries (storage)	-	-	22	-	19	-	-	-	3	44
Building Material	-	-	11	7	12	-	10	-	3	43
Cameras & Photographic Supplies	-	7	-	40	123	14	2	6	32	224
Cigars, Cigarettes Tobacco & Smokers Sundries	1	33	5	341	423	28	30	45	85	991
Infants' Wear	2	16	5	74	137	7	13	7	21	282
Men's Clothing & Furnishings	1	12	5	62	152	17	13	14	17	293
Women's Clothing	2	17	18	85	204	19	25	20	38	428
Drugs & Drug Sundries	1	23	4	68	189	16	13	9	64	387
Dry Goods & Notions	2	16	5	83	164	18	21	12	25	346
Electric Appliances	1	6	2	54	101	4	3	4	13	188
Farm & Garden Equipment	-	-	22	-	14	1	2	39	-	78
Fertilizers	-	-	11	-	7	-	-	31	-	49
Flowers, Wreaths, Etc.	-	-	-	29	23	1	-	-	4	57
Food & Kindred Products	3	69	20	705	1,463	150	160	125	270	2,965
Furniture	-	-	11	65	37	1	1	1	7	123
Furs & Fur Goods	-	-	22	5	34	1	2	-	3	67
Gas Appliances	-	-	11	4	5	-	-	-	-	20
Gasoline, Oils, Etc.	-	-	11	3	3	1	12	8	3	41
Hardware	2	20	7	105	162	9	33	15	25	378
Hay, Grain & Feed	-	12	-	-	-	-	-	31	3	46
Heating & Plumbing	-	-	-	-	12	1	11	1	-	25
House Furnishings	2	16	16	124	174	15	29	13	21	410
Jewelry, Silverware, Etc.	2	16	5	80	160	10	12	15	48	348
Leather Goods	2	16	5	70	117	9	13	13	20	265
Luggage	-	-	11	-	36	1	2	8	3	61
Motor Cycles, Bicycles	-	-	11	-	10	1	1	1	-	24
Musical Instruments	1	6	13	90	85	3	7	14	16	235
Office & Store Equip- ment	-	-	11	-	12	2	3	2	5	35
Optical Equipment	1	10	3	56	57	5	8	8	31	179
Paints, Varnishes, Glass & Painters' Supplies	2	16	17	65	163	9	30	46	21	369
Professional & Scientific Instruments & Equipment	-	-	-	14	-	-	-	-	23	37
Radio & Radio Equipment	-	-	22	76	82	1	17	19	3	220
Seeds, Bulbs, Etc.	1	10	3	37	88	9	8	35	14	205
Shoes & other footwear	-	5	6	63	130	6	-	1	14	225
Sporting Goods	-	-	-	6	46	1	12	12	-	77
Stationery, Books, Etc.	1	17	3	76	158	19	20	10	35	339
Stoves, Ranges, Heaters, Etc.	-	-	22	68	18	1	12	8	3	132
Surgical & Hospital Supplies	-	7	-	18	52	3	2	6	32	120
Toilet Articles	2	23	5	121	259	14	18	13	57	512
Toys & Games	2	16	5	81	166	11	14	10	29	334
Wall Paper	-	-	11	4	5	-	-	-	-	20
Miscellaneous Merchan- dise	1	6	2	115	115	4	2	7	8	260
Second Hand Merchandise	-	-	-	-	8	-	-	-	-	8
TOTAL	34	411	390	3,033	5,379	423	585	619	1,022	11,896



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