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Published by Authority of the HON. JAMES A. MACKINNON, M.P.,
Minister of Trade and Commerce

DEPARTMENT OF TRADE AND COMMERCE
DOMINION BUREAU OF STATISTICS
MERCHANDISING AND SERVICES BRANCH
OTTAWA, CANADA

DOMINION BUREAU OF STATISTICS
JAN 7 1946

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Vol. VIII - No. 11 Price - 10 cents.

PRELIMINARY REPORT ON DEPARTMENT STORE SALES, NOVEMBER, 1945

Department store sales in Canada were 15 per cent higher in November, 1945 compared with November, 1944 and increased 17 per cent over dollar sales in October, 1945. The increase over November, 1944 was similar to that in the October comparison. On an average daily sales basis the November increase was sustained, since there was the same number of days in November of the two years. Part of the October expansion, however, was due to the occurrence of one more business day in October, 1945 than in October, 1944. Unadjusted indexes (on the base, 1935-1939=100) stood at 258.9 for November, 1945, 225.3 for November, 1944 and 220.9 for October, 1945. Sales in the first eleven months of 1945 were 11 per cent higher than in the same period of 1944.

The seasonally adjusted index reached an unprecedented peak of 222.9 in the month under review. As a result of several more or less abnormal factors currently affecting retail merchandising, the adjusted series has become less significant than formerly as an indicator of the underlying trend in sales. Among the more important of these factors are the prevailing ebb and flow in the supply situation of numerous commodities, heavy purchases by service personnel in re-establishing themselves in civilian life and family allowance payments. The occurrence of peaks in the adjusted index for November in the years from 1942 onwards is a condition which reflects the increased trading importance of November in relation to other months of the year. A further observation which might be noted is a broadening in the margin of increase in adjusted indexes between October and November since the beginning of the war. To illustrate this point, the adjusted indexes for November in each year from 1939 onwards expressed as percentages of the adjusted index for October of the same year are as follows; 90.8 in 1939, 106.3 in 1940, 100.8 in 1941, 110.2 in 1942, 107.3 in 1943, 113.7 in 1944 and 117.7 in 1945.

INDEXES OF THE DOLLAR VALUE OF DEPARTMENT STORE SALES, 1935 - 1939 = 100

	1944		1945	
	November	September	October	November
Unadjusted Indexes	225.3	201.6	220.9	258.9
Adjusted Indexes	194.7	205.3	189.3	222.9

Increases in Quebec department stores continue to exceed those for other sections of the country. A 20 per cent gain was reported for November. Ontario, the Prairie Provinces and British Columbia showed gains which in all cases were close to the average result for Canada, while a more moderate advance of 8 per cent occurred in the Maritime Provinces. Sales volume for the first eleven months of this year increased to a greater extent in Quebec and Ontario than in the east or west. Gains over 1944 amounted to 15 per cent in Quebec and 12 per cent in Ontario during the eleven-month period, while comparisons for other sections showed increases of 9 or 10 per cent in each case.



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DEPARTMENT STORE SALES IN OTTAWA

Sales of Ottawa department stores were 17 per cent higher in November, 1945 compared with November, 1944 and averaged 13 per cent greater in the first eleven months of this year compared with last.

DEPARTMENT STORE SALES IN CANADA, BY SELECTED DEPARTMENTS

November, 1944 and November, 1945

(Based on dollar sales of 20 firms including mail order houses)

	November, 1944	November 1945	% Change, 1945/1944
	\$	\$	
TOTAL SALES, ALL DEPARTMENTS	41,678,315	47,567,059	+14.1
1. Women's dresses, coats and suits	5,273,753	5,768,030	+ 9.4
2. Girls' and infants' wear	1,853,722	2,028,523	+ 9.4
3. Hosiery and gloves	1,801,897	1,885,508	+ 4.6
4. Lingerie and corsets	1,677,062	1,753,820	+ 4.6
5. Millinery	457,132	531,229	+16.2
6. Women's and children's apparel - (Total, 1-5) ..	11,063,566	11,967,110	+ 8.2
7. Men's and boys' clothing and furnishings	5,409,327	5,824,088	+ 7.7
8. Drugs and toilet articles and preparations	1,333,007	1,526,534	+14.5
9. Piece goods	2,997,191	3,188,486	+ 6.4
10. Smallwares	1,776,250	1,977,429	+11.3
11. Food and kindred products	2,727,314	3,111,752	+14.1
12. Furniture (including mattresses and springs) ...	2,040,496	2,321,153	+13.8
13. Home furnishings	2,498,423	2,869,165	+14.8
14. Household appliances and electrical supplies ...	620,575	943,207	+52.0
15. Hardware and kitchen utensils	1,055,692	1,412,769	+33.8
16. Radios, musical instruments and supplies	284,758	403,272	+41.6
17. Shoes and other footwear	3,061,003	3,580,893	+17.0
18. Stationery, books and magazines	1,117,230	1,318,548	+18.0
19. All other departments, total	5,693,483	7,122,653	+25.1