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PRELIMINARY REPORT ON DEPARTMENT STORE SALES, MARCH, 1946

Department store sales in Canada gained 11 per cent in March of this year over March, 1945 and were 37 per cent greater than in the preceding month of February. The increase between March of the two years, although somewhat below the gain of 14 per cent in the first quarter of 1946 compared with the similar period a year ago, must be regarded as outstanding. Sales had attained a very high level in March, 1946, under the favourable effects of unusually warm weather and of the concentration of customary Easter purchasing in that month. Weather conditions were almost equally favourable in March this year, but the seasonal Easter trade was a negligible factor owing to the late date of the holiday. Unadjusted indexes (on the base, 1935 - 1939 = 100) stood at 222.3 for March, 1946, 200.5 for March, 1945 and 162.2 for February, 1946.

After adjustments for differences in number of business days, for the varying sales importance of different days of the business week, for normal seasonal fluctuations in trade and for the effect of the shifting date of Easter, the index rose sharply to 258.9 in March, 1946, far above the previous high point in the adjusted series, 222.4, reached in November, 1945. The adjusted index for March was 20 per cent greater than the index for the same month of 1945, which stood at 215.5. The much higher March increase for the adjusted than for the unadjusted series is attributable entirely to the varying effect of the Easter factor in the two years.

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

	1945		1946	
	<u>March</u>	<u>January</u>	<u>February</u>	<u>March</u>
Unadjusted Indexes	200.5	137.0	162.2	222.3
Adjusted Indexes	215.5	182.4	215.6	258.9

Sales increases in corresponding months of this year over last have maintained a more consistent trend in Quebec than elsewhere in Canada. March sales increased 17 per cent, a gain which is identical with that recorded in the quarterly comparison. Increases in Quebec, both for the month under review and also for the quarter, are greater than those recorded in other provinces. In the Maritime Provinces, sales were up only 6 per cent in March following a very substantial increase of 28 per cent in that area during February. Cumulative results showed sales 10 per cent higher in the first three months of this year over last in that region. Trends in other parts of the country deviated little from the average results for the country as a whole. Gains in March, with quarterly increases in brackets, were as follows: Ontario, 9 per cent (15 per cent); Prairie Provinces, 13 per cent (12 per cent) and British Columbia, 10 per cent (13 per cent).

Seventeen firms reported sales on a departmental basis and their total volume was 11 per cent higher in March this year compared with last. Durable goods departments continued the wide expansion which has characterized results for recent months. Increases in March for these departments, led by radio and electrical with a

143 per cent increase and household appliances with a 97 per cent advance, were somewhat similar to those which had been recorded in the February comparisons. Notwithstanding the fact that Easter occurred in March of 1945 and well on in April this year, apparel departments were able to show slight increases over the substantial volume of sales which they had obtained in March a year ago. Drugs, piece goods and smallwares departments had small sales gains over March, 1945, while food departments did 2 per cent less business than in that month.

DEPARTMENT STORE SALES IN OTTAWA

Sales of Ottawa department stores were 9 per cent higher in March, 1946 compared with March, 1945 and were up 14 per cent in the first three months of this year over the same period of 1945.

DEPARTMENT STORE SALES IN CANADA, BY SELECTED DEPARTMENTS

March, 1945 and March, 1946

(Based on dollar sales of 17 firms including mail order houses)

	March, 1945	March, 1946	% Change, 1946/1945
	\$	\$	
TOTAL SALES, ALL DEPARTMENTS	36,779,876	40,819,371	+11.0
1. Women's dresses, coats and suits	5,077,791	5,300,390	+ 4.4
2. Girls' and infants' wear	1,936,558	1,911,520	- 1.3
3. Hosiery and gloves	1,432,862	1,432,512	(a)
4. Lingerie and corsets	1,472,734	1,600,204	+ 8.7
5. Millinery	641,112	558,717	-12.9
6. Women's and children's apparel - (Total, 1-5)	10,561,057	10,803,343	+ 2.3
7. Men's and boys' clothing and furnishings	4,321,554	4,562,264	+ 5.6
8. Drugs and toilet articles and preparations ...	934,331	996,087	+ 6.6
9. Piece goods	3,174,057	3,202,592	+ 0.9
10. Smallwares	1,220,448	1,287,210	+ 5.5
11. Food and kindred products	2,845,762	2,781,916	- 2.2
12. Furniture (including mattresses and springs) .	2,103,197	2,772,955	+31.8
13. Home furnishings	2,432,112	2,890,499	+18.8
14. Household appliances and electrical supplies .	544,090	1,072,738	+97.2
15. Hardware and kitchen utensils	1,547,005	2,096,880	+35.5
16. Radios, musical instruments and supplies	230,178	558,077	+142.5
17. Shoes and other footwear	2,772,033	2,875,985	+ 3.8
18. Stationery, books and magazines	519,526	608,974	+17.2
19. All other departments, total	3,574,526	4,309,851	+20.6

(a) Change of less than 0.1 per cent.