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Published by Authority of the Rt. Hon. C. D. Howe, M.P.,
Minister of Trade and Commerce

DOMINION BUREAU OF STATISTICS

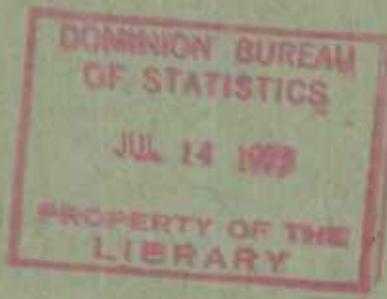
MERCHANDISING AND SERVICES SECTION

OTTAWA, CANADA

RETAIL CHAINS

IN
CANADA

1947



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DEFINITIONS.

Chains

For the purpose of this survey, a retail chain is an organization operating four or more retail stores under the same ownership.

Classification by Kind of Business

A chain is classified according to the kind of business carried on by the majority of its stores. Due to this broader classification, some chains may operate a store of a type different from the chain as a whole. In a few instances where a chain operated several stores of two distinct types, separate reports were submitted and each type tabulated in its proper classification.

Classification by type of organization

Local chains are those operated within one city or locality. Provincial, as the name implies, are those confined to one province yet broader in field of operation than the local chains. Sectional chains cover more than one province, yet are confined to a region such as the Maritimes or Prairies while national chains operate stores in most if not all provinces.

Stores - average

The average number of stores operated is obtained by averaging the number in operation at January 1st, June 30 and December 31st.

- Maximum

The maximum number is the total number of stores operated throughout the year, whether continuous or part year.

Sales

Net retail sales are gross sales less any returns and allowances. Sales at wholesale are not included.

Salaries and Wages

Salaries and wages shown in this report are those paid to store employees only, as comparable to store sales. Salaries and wages paid to head office and warehouse employees are not included.

Accounts Outstanding

This represents the amounts owing on charge, instalment or open accounts at the end of the year. It does not include accounts written off.

Stocks

The inventory of stocks on hand at the end of the year in both stores and warehouses is at cost or invoice value.

DOMINION BUREAU OF STATISTICS
MERCHANDISING AND SERVICES SECTION
OTTAWA

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Series 1947
No. 15

16-1050

RETAIL CHAINS IN CANADA, 1947

Introduction

The Dominion Bureau of Statistics conducts an annual survey on the operation of retail chains. Information is obtained and results tabulated by kind of business on the number of stores operated, net retail sales, salaries and wages paid to store employees, accounts outstanding and store and warehouse inventories at the end of the year. Reports are received from all known firms coming within the definition of a chain, giving this study complete coverage.

Separate reports have been published on Food Chains, Variety Chains and Drug Chains, 1947 showing more detail than presented in this bulletin. Department stores which might be considered as belonging to the chain field are not included.

SUMMARY

1. Comparison with Previous Years

Table 1 depicts the growth of retail chain stores since 1930, the first year in which the survey was conducted. While the number of stores fell from 8,504 in 1930 to 6,940 in 1947, sales increased from \$487,336,000 to \$1,175,286,700. The average sales per store more than quadrupled over this period. In 1947, salaries and wages paid to store employees were less than twice the 1930 figure. Accounts outstanding, which had been reduced substantially during the war years, increased considerably by the end of 1947 - \$31,492,500 as compared to \$15,093,000 at the end of 1944. Both store and warehouse stocks were in greater dollar volume at the end of 1947 than at any other period shown.

2. Provincial Comparison

All provinces of the country shared in the general increase in dollar volume of sales during 1947. The maritime provinces of Prince Edward Island and Nova Scotia showed the smallest gain while Quebec chain store sales increased 22 per cent. (Table 4).

3. Chains Classed by Type

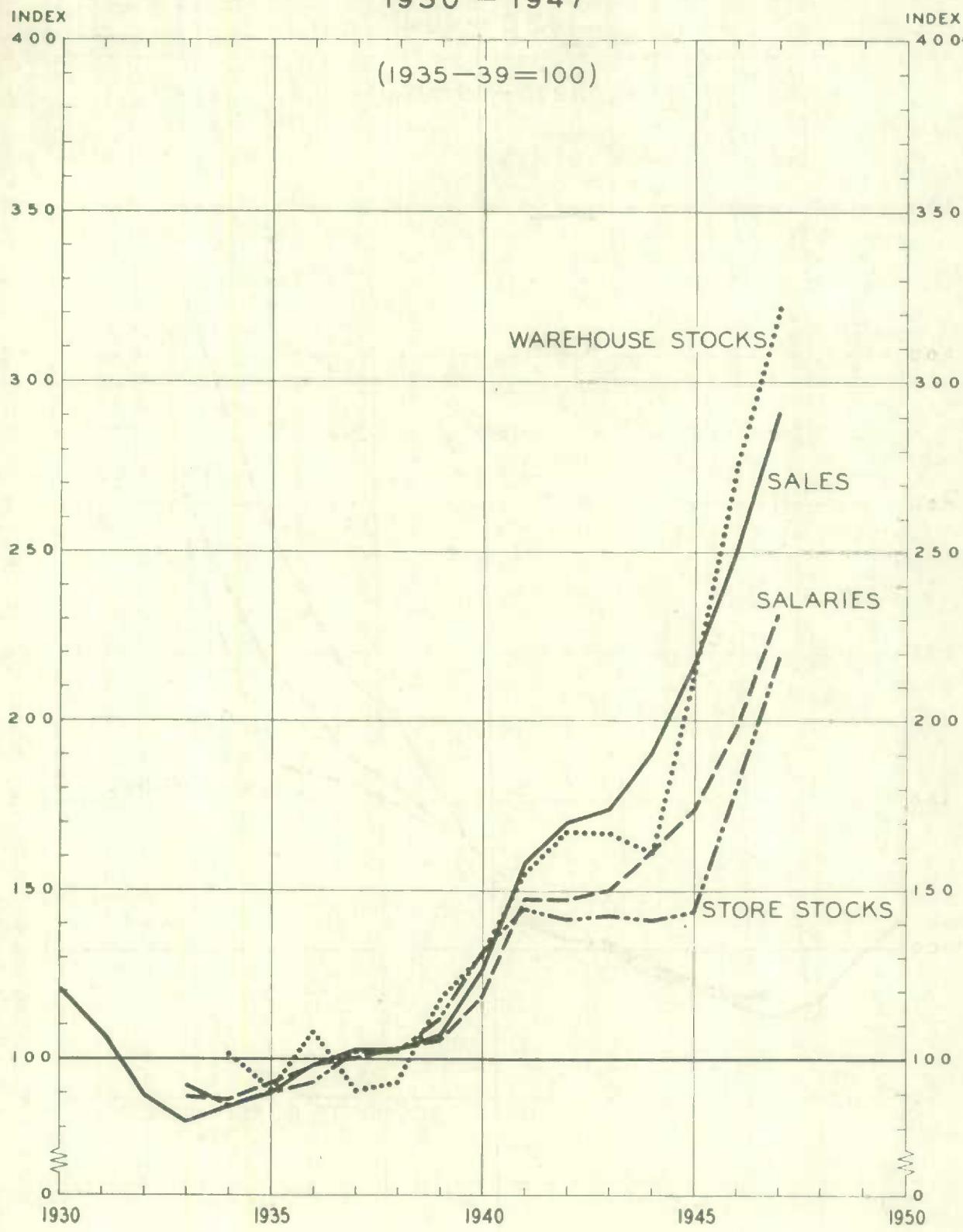
In 1947 little change took place in the distribution of sales through the different types of chain organizations. Provincial chains lost a small share of their 1946 ratio to sectional and national chains but still accounted for nearly half the business transacted by all retail chains. (Table 5).

4. Chains Classed by Units and Size

One firm advanced to the group of 100 or more units to raise the proportion of business done by that group from 40.5 per cent in 1946 to 42.5 per cent in 1947. Increased dollar volume of sales also accounted for the increase in the number of firms in the sales volume class of \$5,000,000 and over. This raised the proportion of sales for that size class from 64.7 per cent in 1946 to 67.4 per cent in 1947. (Tables 6 and 7).

RETAIL CHAINS IN CANADA
TOTAL SALES, SALARIES, STORE
AND WAREHOUSE STOCKS

1930 — 1947



**RETAIL CHAINS IN CANADA
AVERAGE SALES, SALARIES, STOCKS
AND ACCOUNTS OUTSTANDING
PER STORE**

1930 — 1947

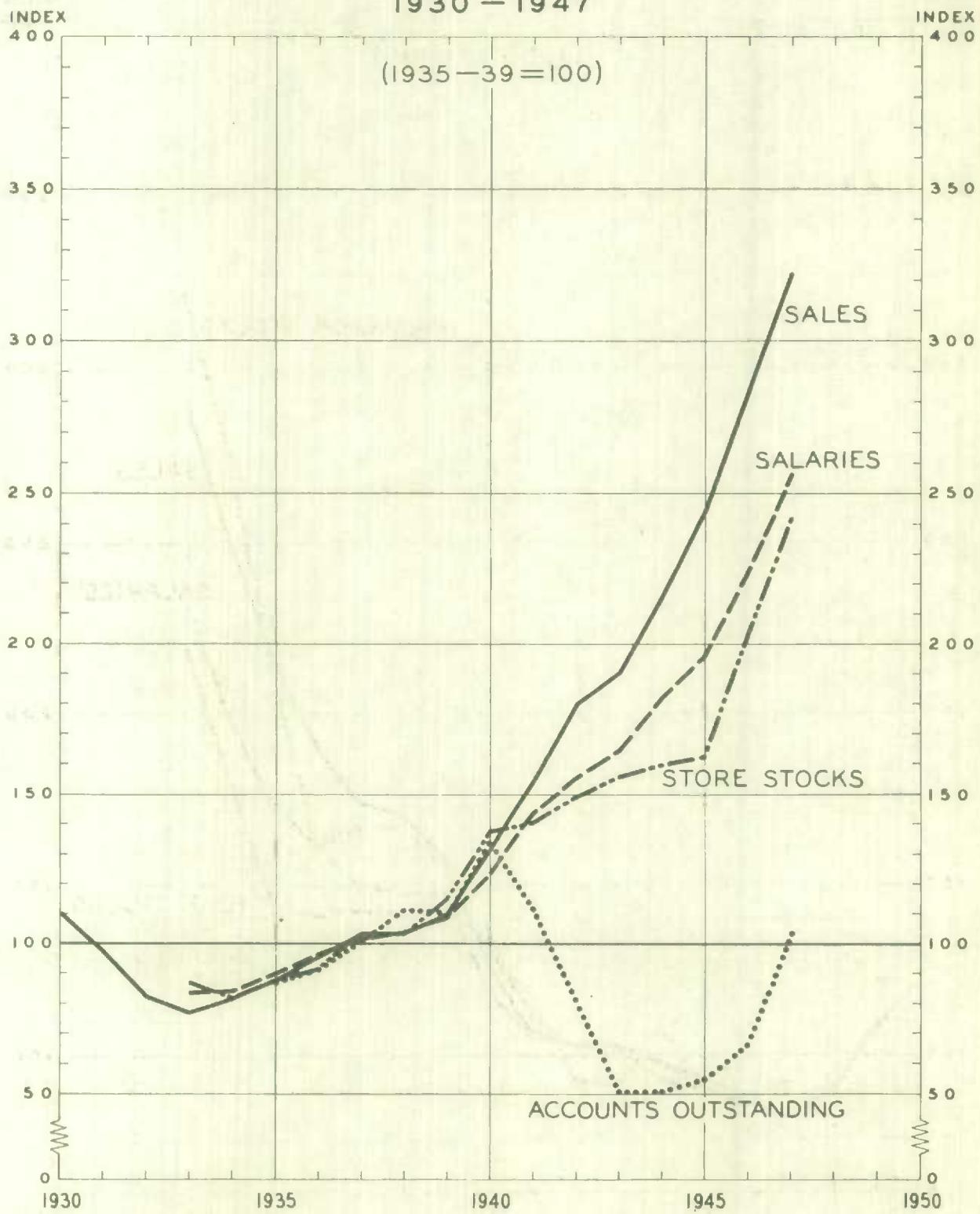


Table 1.—Summary of Retail Chains in Canada, 1930 - 1947

Year	Number of Chains	Stores		Retail Sales	Average Sales Per Store	Salaries and Wages Paid to Store Employees	Accounts Out- standing	Stocks on Hand End of Year	
		Aver- age(1)	Max- imum					Stores	Warehouses
1930 .	518	8,097	8,504	487,336,000	60,187	50,404,900	(a)	60,457,200	(a)
1931 .	506	8,188	8,557	434,199,700	53,029	(a)	(a)	(a)	(a)
1932 .	486	8,066	8,398	360,806,200	44,732	(a)	(a)	(a)	(a)
1933 .	461	7,900	8,230	328,902,600	41,633	34,820,600	(a)	43,995,100	(a)
1934 .	445	7,804	8,210	347,186,100	44,488	34,510,900	(a)	40,962,600	13,768,100
1935 .	445	7,666	8,022	364,129,800	47,499	36,382,000	30,188,700	42,796,200	12,265,900
1936 .	457	7,588	8,124	394,935,000	52,047	38,603,000	31,430,400	44,258,000	14,631,500
1937 .	447	7,346	7,815	414,133,300	56,375	39,289,500	33,526,200	48,550,700	12,280,000
1938 .	457	7,356	7,692	414,448,300	56,342	40,368,400	37,073,700	48,617,300	12,623,200
1939 .	446	7,215	7,595	432,026,100	59,879	41,427,800	35,942,800	53,167,700	15,915,600
1940 .	451	7,131	7,522	508,553,900	71,316	46,462,300	43,229,700	62,634,500	17,621,700
1941 .	529	7,622	7,969	639,210,400	83,864	57,777,200	38,376,100	68,619,200	20,975,600
1942 .	455	7,010	7,139	687,447,400	98,067	57,653,700	(a)	66,939,700	22,633,400
1943 .	444	6,780	7,021	703,950,000	103,827	58,804,000	15,526,900	67,628,000	22,602,500
1944 .	431	6,560	6,774	769,643,200	117,324	63,299,700	15,093,000	66,943,500	21,854,900
1945 .	429	6,580	6,705	876,209,000	133,162	68,196,400	16,368,500	68,246,800	29,013,100
1946 .	422	6,559	6,743	1,014,846,700	154,725	77,474,400	19,642,600	85,345,200	37,436,400
1947 .	422	6,696	6,940	1,175,286,700	175,521	90,780,200	31,492,500	103,954,000	43,546,000

(1) Obtained by averaging the number at the beginning, middle and end of year.

(a) Not available.

Table 2.-Principal Statistics of Retail Chains in Canada, 1947
by Kinds of Business

Kind of Business	Number of Chains	Number of Stores	
		Average	Maximum
Total, All Chains	422	6,696	6,940
Food Group, Total	89	1,600	1,665
Bakery product dealers	12	163	176
Candy and confectionery stores	9	152	164
Grocery stores	19	299	308
Combination stores	32	860	879
Meat markets	13	102	114
Other food stores	4	24	25
Country General Store Group	17	126	127
General Merchandise Group, Total	30	609	631
Dry goods and general merchandise stores	12	92	95
Variety, 5-10-15¢ to-a-dollar stores	18	517	536
Automotive Group, Total	17	141	154
Motor vehicle dealers	5	28	31
Filling stations	9	88	98
Other automotive accessories stores	3	25	25
Apparel Group, Total	100	1,096	1,131
Men's and boys' clothing and furnishings stores	12	114	117
Family clothing stores	20	122	125
Women's apparel and accessories stores	38	345	374
Shoe stores	30	489	515
Building Materials Group, Total	36	755	776
Hardware stores	6	33	34
Lumber and building material dealers	26	688	706
Paint, varnish and wallpaper stores	4	34	36
Furniture-Household-Radio Group, Total	35	384	406
Furniture stores	18	147	154
Household appliance, radio and music stores	17	237	252
Restaurant Group, Total	19	229	256
Other Retail Stores, Total	79	1,756	1,793
Drug stores	26	307	314
Jewellery stores	4	42	44
Office store and school furniture equipment and supplies dealers	13	157	159
Opticians and optometrists	3	13	14
Tobacco stores	5	201	207
Government liquor stores	8	543	553
Wine stores	5	29	30
Miscellaneous kinds of business	15	464	472

Table 2.--Principal Statistics of Retail Chains in Canada, 1947
by Kinds of Business

Sales (Retail)		Salaries and Wages	Customer's Accounts Outstanding, December 31, 1947	Stocks on hand, December 31, 1947	
Amount	% of total chain sales			Stores	Warehouses
\$ 1,175,286,700	100.0	\$ 90,780,200	\$ 31,492,500	\$ 103,954,000	\$ 43,546,000
323,440,000	27.5	21,037,400	920,300	11,477,100	13,557,900
7,087,300	0.6	963,200	21,500	74,100	159,100
5,364,800	0.4	628,800	200	78,500	80,300
25,394,200	2.2	1,931,500	203,400	1,949,700	807,900
275,539,000	23.4	16,647,200	619,600	9,194,300	12,256,600
7,893,500	0.7	716,000	58,500	127,300	16,500
2,161,200	0.2	150,700	17,100	53,200	237,600
12,542,200	1.1	946,800	786,000	3,098,500	6,300
130,338,700	11.1	15,365,300	663,700	14,694,800	2,363,100
12,413,400	1.1	1,296,000	659,100	2,166,600	60,300
117,925,300	10.0	14,069,300	4,600	12,528,200	2,302,800
23,005,200	1.9	2,526,900	2,065,500	2,525,200	164,000
16,291,500	1.4	1,655,900	1,801,600	1,954,200	-
4,413,600	0.3	521,700	61,500	226,600	164,000
2,300,100	0.2	349,300	202,400	344,400	-
103,539,900	8.8	10,076,800	2,606,800	17,086,100	3,104,800
15,331,100	1.3	1,406,800	161,800	2,017,300	200,900
30,453,600	2.6	3,132,700	1,849,100	5,742,800	498,600
29,023,700	2.5	2,326,300	561,700	2,976,300	763,100
28,731,500	2.4	3,211,000	34,200	6,349,700	1,642,200
59,972,600	5.1	4,363,100	3,330,100	14,421,000	88,100
6,391,000	0.5	618,800	443,400	1,410,900	2,200
51,239,200	4.4	3,477,900	2,622,300	12,338,800	85,900
2,352,400	0.2	266,400	264,400	671,300	-
55,549,200	4.7	5,593,300	9,222,100	8,760,600	2,735,300
32,891,300	2.8	2,789,300	6,641,600	5,065,600	2,288,900
22,657,900	1.9	2,804,000	2,580,500	3,695,000	446,400
20,726,400	1.8	5,357,800	10,700	349,400	524,100
446,172,500	38.0	25,512,800	11,887,300	31,541,300	21,002,400
26,868,800	2.3	3,667,900	153,600	3,716,400	966,100
18,851,100	1.6	2,047,400	2,039,500	2,984,800	18,200
35,724,900	3.1	8,405,300	6,772,400	3,383,500	114,700
199,600	(a)	75,300	8,700	30,400	300
14,954,100	1.3	1,336,300	66,000	1,242,700	477,800
264,490,500	22.5	5,772,200	8,500	11,718,000	16,612,900
2,667,600	0.2	210,500	-	204,000	268,800
82,415,900	7.0	3,997,900	2,838,600	8,261,500	2,543,600

(a) Less than 0.05 per cent.

Table 3.--Chains, Stores and Sales for Selected Kinds
of Business, 1941, 1946, 1947

Kind of Business	1941	1946	1947
Total, All Chains --			
Chains (number)	529	422	422
Stores (maximum)	7,969	6,743	6,940
Chain sales \$	639,210,400	1,014,846,700	1,175,286,700
Grocery and combination stores --			
Chains (number)	62	52	51
Stores (maximum)	1,541	1,177	1,187
Chain sales \$	172,317,400	237,677,300	300,933,200
Meat markets --			
Chains (number)	17	13	13
Stores (maximum)	166	112	114
Chain sales \$	5,088,500	7,600,800	7,893,500
Variety stores --			
Chains (number)	20	19	18
Stores (maximum)	532	523	536
Chain sales \$	74,179,100	107,586,200	117,925,300
Men's and boys' clothing and furnishings stores (including custom tailors) --			
Chains (number)	18	12	12
Stores (maximum)	147	115	117
Chain sales \$	9,498,700	13,036,500	15,331,100
Family clothing stores --			
Chains (number)	19	16	20
Stores (maximum)	115	97	125
Chain sales \$	13,943,500	23,570,200	30,453,600
Women's apparel and accessories stores --			
Chains (number)	38	35	38
Stores (maximum)	318	325	374
Chain sales \$	12,438,300	23,076,000	29,023,700
Shoe stores --			
Chains (number)	35	30	30
Stores (maximum)	452	481	515
Chain sales \$	16,312,600	26,106,900	28,731,500

Table 3.--Chains, Stores and Sales for Selected Kinds
of Business, 1941, 1946, 1947 - (Concl'd)

Kind of Business	1941	1946	1947
Hardware stores --			
Chains (number)	7	6	6
Stores (maximum)	38	33	34
Chain sales \$	3,849,700	5,821,600	6,381,000
Lumber and building material dealers --			
Chains (number)	30	26	26
Stores (maximum)	732	691	706
Chain sales \$	19,979,000	43,854,200	51,239,200
Furniture stores --			
Chains (number)	16	15	18
Stores (maximum)	127	131	154
Chain sales \$	15,484,200	22,245,400	32,891,300
Household appliance, radio and music stores --			
Chains (number)	27	19	17
Stores (maximum)	410	259	252
Chain sales \$	18,655,600	16,959,900	22,657,900
Restaurants --			
Chains (number)	27	21	19
Stores (maximum)	256	256	256
Chain sales \$	11,918,800	20,564,600	20,726,400
Drug stores --			
Chains (number)	35	27	26
Stores (maximum)	363	318	314
Chain sales \$	18,944,500	26,483,700	26,868,800
Office, school and store supplies and equipment dealers --			
Chains (number)	13	13	13
Stores (maximum)	147	156	159
Chain sales \$	20,192,600	27,443,600	35,724,900
Tobacco stores and stands --			
Chains (number)	6	4	5
Stores (maximum)	217	201	207
Chain sales \$	7,185,800	14,219,600	14,954,100
Liquor stores --			
Chains (number)	9	8	8
Stores (maximum)	615	545	553
Chain sales \$	112,397,800	249,022,800	264,490,500

Table 4. -Chains, Stores and Sales by Provinces, 1941, 1946, 1947

	1941	1946	1947	Per cent change 1946-1947
Canada Total, All Chains --				
Chains (number)	529	422	422	
Stores (maximum)	7,969	6,743	6,940	
Chain sales \$	639,210,400	1,014,846,700	1,175,286,700	+15.8
N.W.T. and Yukon --				
Chains (number)	5	4	4	
Stores (maximum)	62	54	54	
Chain sales \$	1,493,600	4,207,000	5,107,300	+21.4
British Columbia --				
Chains (number)	91	85	90	
Stores (maximum)	765	711	768	
Chain sales \$	63,925,100	109,838,800	130,436,200	+18.8
Alberta --				
Chains (number)	88	69	72	
Stores (maximum)	576	516	539	
Chain sales \$	36,071,200	65,608,300	72,888,600	+11.1
Saskatchewan --				
Chains (number)	76	66	64	
Stores (maximum)	880	684	663	
Chain sales \$	32,458,600	59,760,000	63,026,500	+ 5.5
Manitoba --				
Chains (number)	68	62	64	
Stores (maximum)	334	290	303	
Chain sales \$	27,377,400	50,008,900	55,322,100	+10.6
Ontario --				
Chains (number)	281	220	220	
Stores (maximum)	3,368	2,839	2,894	
Chain sales \$	293,671,300	435,193,800	508,762,000	+16.9
Quebec --				
Chains (number)	161	136	133	
Stores (maximum)	1,428	1,185	1,250	
Chain sales \$	131,225,900	202,105,200	246,309,100	+21.9
New Brunswick --				
Chains (number)	46	38	38	
Stores (maximum)	215	176	173	
Chain sales \$	19,762,100	37,115,800	41,295,900	+11.3
Nova Scotia --				
Chains (number)	56	46	49	
Stores (maximum)	325	275	283	
Chain sales \$	32,214,400	49,961,700	51,063,600	+ 2.2
Prince Edward Island --				
Chains (number)	9	8	8	
Stores (maximum)	16	13	13	
Chain sales \$	1,010,800	1,047,200	1,075,400	+ 2.7

Table 5.—Retail Chains Classified According to Type of Operation:
1941, 1946, 1947

Type of Operation	Number of Chains	Number of Stores	Chain Sales	
			Amount	Per cent of total
1941				
Total, All Chains	529	7,969	\$ 639,210,400	100.0
Local chains	175	1,084	60,308,700	9.4
Provincial chains	234	3,160	287,495,000	45.0
Sectional and National chains .	120	3,725	291,406,700	45.6
1946				
Total, All Chains	422	6,743	\$ 1,014,846,700	100.0
Local chains	137	888	82,899,700	8.2
Provincial chains	188	2,796	503,829,900	49.6
Sectional and National chains .	97	3,059	428,117,100	42.2
1947				
Total, All Chains	422	6,940	\$ 1,175,286,700	100.0
Local chains	134	899	94,528,300	8.1
Provincial chains	191	2,863	571,453,000	48.6
Sectional and National chains .	97	3,178	509,305,400	43.3

Table 6.--Retail Chains Classified According to Number of Units Operated
1941, 1946, 1947

	Number of Chains	Number of Stores	Chain Sales	
			Amount	Per cent of total
1 9 4 1				
Total, All Chains	529	7,969	\$ 639,210,400	100.0
Less than 6 units	223	968	71,938,200	11.3
6-10 units	163	1,237	77,860,200	12.2
11-25 units	78	1,260	81,787,700	12.8
26-50 units	36	1,272	80,859,700	12.6
51-100 units	16	1,155	77,879,500	12.2
100 or more units	13	2,077	248,885,100	38.9
1 9 4 6				
Total, All Chains	422	6,743	\$ 1,014,846,700	100.0
Less than 6 units	150	650	69,861,000	6.9
6-10 units	142	1,066	113,841,100	11.2
11-25 units	72	1,186	139,368,300	13.7
26-50 units	30	1,017	137,480,200	13.6
51-100 units	17	1,196	142,946,100	14.1
100 or more units	11	1,628	411,350,000	40.5
1 9 4 7				
Total, All Chains	422	6,940	\$ 1,175,286,700	100.0
Less than 6 units	145	626	85,234,200	7.2
6-10 units	145	1,068	130,646,000	11.1
11-25 units	68	1,097	151,346,400	12.9
26-50 units	36	1,233	160,451,500	13.7
51-100 units	16	1,135	148,525,100	12.6
100 or more units	12	1,781	499,083,500	42.5

Table 7.--Retail Chains Classified According to Amount of Annual Retail Sales,
1941, 1946, 1947

Annual Sales Volume of Chain	Number of Chains	Number of Stores	Chain Sales	
			Amount	Per cent of total
1 9 4 1				
Total, All Chains	529	7,969	\$ 639,210,400	100.0
Under \$100,000	83	447	5,588,800	0.9
\$100,000 - \$199,999	104	607	15,290,900	2.4
\$200,000 - \$499,999	159	1,277	50,175,500	7.9
\$500,000 - \$999,999	82	993	59,574,600	9.3
\$1,000,000 - \$4,999,999	78	2,399	158,032,200	24.7
\$5,000,000 and over	23	2,246	350,548,400	54.8
1 9 4 6				
Total, All Chains	422	6,743	\$ 1,014,846,700	100.0
Under \$100,000	19	117	1,301,400	0.1
\$100,000 - \$199,999	53	288	8,185,400	0.8
\$200,000 - \$499,999	117	714	39,241,500	3.9
\$500,000 - \$999,999	87	788	59,412,700	5.9
\$1,000,000 - \$4,999,999	117	2,431	249,808,600	24.6
\$5,000,000 and over	29	2,405	656,897,100	64.7
1 9 4 7				
Total, All Chains	422	6,940	\$ 1,175,286,700	100.0
Under \$100,000	19	107	1,448,300	0.1
\$100,000 - \$199,999	42	237	6,822,900	0.6
\$200,000 - \$499,999	110	685	37,450,800	3.2
\$500,000 - \$999,999	94	786	63,948,700	5.4
\$1,000,000 - \$4,999,999	121	2,364	273,260,200	23.3
\$5,000,000 and over	36	2,761	702,355,800	67.4

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