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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

RETAIL MERCHANDISE TRADE
IN
BRITISH COLUMBIA
CALENDAR YEAR
1938

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Retail Merchandise Trade in British Columbia, 1938.

Retail sales in British Columbia in 1938 totalled \$222,386,000, a decline of 4.4 per cent from 1937. This was a reversal of the trend of the immediately preceding years during which sales rose from \$155,747,000 in 1933 to \$172,927,000 in 1934; \$188,424,000 in 1935; \$208,913,000 in 1936; and \$232,740,000 in 1937. The index for 1938 stands at 89.5 on the base 1930 equals 100.

Sales for the year fell off to a greater or lesser degree in practically all lines of business. Stores of the food group with sales for 1938 amounting to \$40,357,000 recorded a decline of 2.6 per cent from the previous year. The index of the group as a whole stands at 82.9 compared with 85.1 for 1937, 78.5 for 1936, and 66.2 for 1933. Grocery and combination stores, which from the point of view of volume of sales are the most important members of the food group recorded sales totalling \$23,071,000, a decline of 2.3 per cent from the 1937 sales of \$23,604,000. The index for grocery and combination stores stands at 87.8 for 1938, 89.8 for 1937, 82.2 for 1936, and 69.5 for 1933. Similarly the sales of candy and confectionery stores were down 6.0 per cent, and meat markets (including sea foods) were down 2.6 per cent.

Sales of the general merchandise group which includes department stores, dry goods stores, general merchandise stores and variety stores were down 2.2 per cent. Sales of the group in 1938 were valued at \$42,249,000 compared with \$43,218,000 in 1937, \$39,995,000 in 1936, and \$33,902,000 in 1933. In spite of the decline in 1938, the recovery from the low point of 1933 remains substantial. The index for the general merchandise group stands at 92.1 which is only 7.9 per cent below the base year of 1930. Within the group, department stores contributed sales to the value of \$34,501,000, a decline of 2.8 per cent from the 1937 sales of \$35,495,000. Sales of dry goods stores were down 1.0 per cent and general merchandise stores 2.5 per cent. The index of dry goods stores, however, was well maintained at 101.3 while the index of general merchandise stores stands at 96.3, only 3.7 per cent below the 1930 base. Variety stores offered the only exception to the downward trend of sales in the general merchandise group. Sales of variety stores totalled \$4,375,000 and exceeded by 1.8 per cent the sales of \$4,297,000 reported for 1937. Variety store sales have held up remarkably well since 1930, the index for 1938 standing at 120.2 compared with 118.0 for 1937, 108.9 for 1936, and 83.1 for 1933.

Sales of the automotive group, reversing their upward trend since 1933, fell 10.7 per cent in 1938 from the 1937 level. The total sales of the group for 1938 amounted to \$38,949,000 compared with \$43,621,000 for 1937, \$36,444,000 for 1936, and \$19,583,000 for 1933. The sales index for the automotive group as a whole stands at 114.1 for 1938. Of the total sales of the group, sales of motor vehicle dealers accounted for \$26,386,000, which was a decline of 16.4 per cent from the motor vehicle dealers sales for the previous year. In spite of this decline, however, the index for motor vehicle dealers stands at 123.9 for 1938 compared with 148.2 for 1937, 118.5 for 1936, and 48.0 for 1933. There was little change in the sales of dealers in accessories, tires and batteries, but sales of filling stations and garages were up 6.1 per cent and 1.8 per cent respectively.

Sales of country general stores amounted to \$16,612,000 in 1938, a decline of 1.1 per cent from the 1937 sales of \$16,797,000. The sales index for the year 1938 stands at 94.1. Sales of the apparel group which includes men's and boys' clothing and furnishings, family clothing

stores, women's apparel and accessory stores and shoe stores, were down 4.7 per cent from \$14,285,000 in 1937 to \$13,619,000 in 1938. The index for the group for 1938 stands at 78.2.

The building materials group as a whole has made a poor recovery from the low level of 1933, although within the group, sales of hardware stores have returned to within 3 per cent of the base year 1930. Sales of the building materials group amounted to \$9,104,000 in 1938, a decline of 1.0 per cent from the 1937 sales of \$9,197,000. The index for the group stands at 73.7. Although the sales of hardware stores, amounting to \$4,330,000 were down 3.5 per cent from 1937, the index was well maintained at 97.8. Sales of lumber and building material dealers were down 3.5 per cent with the sales index standing at 64.9. Sales of electrical, heating and plumbing, paint and glass shops, on the other hand, were up 10.5 per cent. In spite of this increase, however, as well as the substantial increases since 1935, the index of sales stands at only 56.5.

Sales for the furniture and household group, including furniture stores, household appliance stores, other home furnishings stores and radio and music stores were down 5.9 per cent. Sales of restaurants, cafeterias and eating places were down 7.9 per cent; farmers' supply stores, 5.7 per cent; book stores, 6.6 per cent; coal and wood yards, 8.8 per cent; drug stores, 0.7 per cent; jewellery stores, 2.8 per cent; office, school and store supplies and equipment dealers, 4.0 per cent; tobacco stores and stands, 2.4 per cent; and government liquor stores, 2.6 per cent. Sales of florists, on the other hand, were 3.0 per cent greater than in 1937.

Chain Stores

There were 77 chain store companies operating 708 unit stores in British Columbia in 1938, with sales totalling \$45,510,500. In the previous year the same number of companies operated 696 unit stores with sales of \$46,497,900. Although there was a decrease in the value of sales, the proportion of total trade secured by chains increased from 20.0 per cent in 1937 to 20.5 per cent in 1938. There were 14 chains in the grocery combination store and meat market field operating 281 unit stores in 1938 compared with 15 companies operating 292 stores in 1937. Sales decreased from \$11,888,200 in 1937 to \$11,199,600 in 1938, while the proportion of the total grocery and combination store and meat market trade secured by chains also decreased from 38.0 per cent to 36.6 per cent. Variety chains with 3 companies operating 22 stores secured 74.3 per cent of the total sales in their field. Sales of variety chains totalled \$3,250,500 in 1938 compared with \$3,176,000 in the previous year. Four shoe store chains with 28 unit stores transacted 23.9 per cent of the total shoe store business in 1938. Five restaurant chains with 28 units transacted 10.4 per cent of the total business in their field while 4 drug chains with 50 unit stores transacted 34.3 per cent of the total retail drug store business.

Scope of Report

The figures for 1930 shown in this report are taken from the results of the Census of Merchandising and Service Establishments which was taken in connection with the decennial Census of 1931. Indexes of sales for years 1931 to 1938 have been computed from annual surveys of retail trade, for which returns are received from all chain store companies and from a representative number of independent stores. These indexes have been then applied to the total sales figures for 1930 in order to give the most accurate estimate available of the total retail trade in later years. It is, therefore, apparent that figures shown herein must be considered as relating to the total trade and not to the business of only those stores included in the sample covered each year.

It should also be clearly understood that all retail sales figures given in this report relate to stores grouped according to kind of business and not to commodity sales. Grocery stores sell a number of lines of goods in addition to strictly grocery items. Drug stores are not restricted to the sale of drugs and medicines. On the other hand, groceries are sold in many kinds of stores in addition to those units classified as grocery stores. Country general stores and department stores are active competitors in the sale of grocery products.

BRITISH COLUMBIA - RETAIL MERCHANDISE TRADE, 1938

Table 1.—Total Net Sales and Sales Indexes, by Kinds of Business

Kind of Business	1 9 3 0		Total Net Sales, (Estimated)		Indexes of Retail Sales (1930 = '100)									% of Change, 1938/37
	Number(1) of Stores	Total Net Sales			1930	1931	1932	1933	1934	1935	1936	1937	1938	
			1937	1938										
		\$	\$	\$										
Total, All Stores	9,501	248,597,500	232,740,000	222,386,000	100 0	83.7	65.9	62.6	69.6	75.8	84.0	93.6	89.5	- 4.4
Food Group	3,476	48,692,000	41,451,000	40,357,000	100.0	84.5	70.0	63.2	69.7	74.7	78.5	85.1	82.9	- 2.6
Candy and confectionery stores	747	4,699,300	3,758,000	3,533,000	100.0	83.3	66.7	61.5	63.6	65.4	71.7	80.0	75.2	- 6.0
Fruit and vegetable stores	192	1,648,000	1,808,000	1,662,000	100.0	92.4	82.1	80.8	83.9	91.4	103.7	109.7	100.8	- 8.1
Grocery and combination stores	1,461	26,287,900	23,604,000	23,071,000	100.0	86.3	73.3	69.5	72.8	78.8	82.2	89.8	87.8	- 2.3
Meat markets (including sea foods).	506	10,908,200	7,704,000	7,504,000	100.0	77.7	60.9	56.7	60.6	64.9	66.7	70.6	68.8	- 2.6
Country General Stores	814	17,653,500	16,797,000	16,612,000	100.0	84.4	69.5	65.5	73.0	80.0	85.5	95.1	94.1	- 1.1
General Merchandise Group	202	45,862,100	43,218,000	42,249,000	100.0	91.4	75.8	73.9	78.0	81.3	97.2	94.2	92.1	- 2.2
Department stores	25	38,831,900	35,495,000	34,501,000	100.0	91.4	75.5	74.1	77.3	79.8	84.8	91.4	88.8	- 2.8
Dry goods stores	112	2,146,600	2,197,000	2,175,000	100.0	83.6	67.4	63.7	74.2	81.1	93.0	102.3	101.3	- 1.0
General merchandise stores	35	1,243,600	1,229,000	1,198,000	100.0	77.2	67.3	60.6	73.6	85.3	88.9	98.8	96.3	- 2.5
Variety stores	30	3,640,000	4,297,000	4,375,000	100.0	100.3	87.2	83.1	69.1	95.4	103.9	118.0	120.2	+ 1.8
Automotive Group	1,122	34,122,100	43,621,000	38,949,000	100.0	77.9	57.5	57.4	74.4	87.1	106.8	127.8	114.1	-10.7
Motor vehicle dealers	196	21,296,000	31,562,000	26,386,000	100.0	70.2	44.5	48.0	70.1	89.9	118.5	148.2	123.9	-16.4
Accessories, tires and batteries ..	48	1,116,800	1,080,000	1,069,000	100.0	82.7	70.2	65.1	74.5	76.6	80.1	96.7	95.7	- 1.0
Filling stations(2)	463	5,360,100	6,266,000	6,647,000	100.0	106.0	97.5	91.5	103.4	103.1	109.4	116.9	124.0	+ 6.1
Garages	368	5,607,200	3,921,000	3,992,000	100.0	80.0	66.8	59.3	63.3	62.9	66.6	69.9	71.2	+ 1.8
Apparel Group	772	17,409,400	14,285,000	13,619,000	100.0	83.9	65.6	62.5	68.3	72.0	77.2	82.1	78.2	- 4.7
Men's and boys' clothing and fur- nishings (includes custom tailors)	342	6,366,200	5,015,000	4,619,000	100.0	78.1	58.2	54.3	61.5	67.6	74.0	78.8	72.6	- 7.9
Family clothing stores	51	1,828,000	1,699,000	1,629,000	100.0	80.0	65.9	65.0	74.7	78.0	85.3	92.9	89.1	- 4.1
Women's apparel and accessories stores	257	6,137,000	5,076,000	4,898,000	100.0	88.8	70.6	67.9	71.8	73.3	77.7	82.7	79.8	- 3.5
Shoe stores	122	3,078,200	2,495,000	2,473,000	100.0	88.7	70.7	67.0	71.8	74.7	78.2	81.1	80.3	- 0.9

(1) and (2): See footnotes on Page 4.

BRITISH COLUMBIA - RETAIL MERCHANDISE TRADE, 1938.

Table 1.--Total Net Sales and Sales Indexes, by Kinds of Business--(Cont'd.)

Kind of Business	1 9 3 0		Total Net Sales, Estimated		Indexes of Retail Sales (1930 = 100)									% of Change, 1938/37
	Number(1) of Stores	Total Net Sales	1937	1938	1930	1931	1932	1933	1934	1935	1936	1937	1938	
Building Materials Group	379	\$ 12,348,900	\$ 9,197,000	\$ 9,104,000	100.0	81.3	53.1	46.2	50.4	56.9	63.7	74.5	773.7	- 1.0
Hardware stores	184	4,425,400	4,487,000	4,330,000	100.0	87.5	66.6	65.5	72.4	82.2	87.2	101.4	97.8	- 3.5
Lumber and building material dealers	83	3,945,800	2,655,000	2,562,000	100.0	76.1	45.0	40.0	44.4	49.2	58.3	67.3	64.9	- 3.5
Electrical, heating and plumbing, paint and glass shops	98	2,130,600	1,089,000	1,203,000	100.0	72.3	42.2	30.8	32.3	36.0	41.2	51.1	56.5	+10.5
Furniture and Household Group .	301	8,207,100	7,135,000	6,717,000	100.0	75.1	55.8	51.0	60.3	68.2	79.8	86.9	81.8	- 5.9
Furniture stores	86	2,456,800	2,604,000	2,432,000	100.0	86.1	68.2	61.7	74.5	82.6	94.7	106.0	99.0	- 6.6
Household appliance stores	45	1,942,700	1,437,000	1,332,000	100.0	62.5	53.8	48.4	50.9	60.6	65.7	74.0	68.6	- 7.3
Other home furnishings stores	69	818,000	768,000	690,000	100.0	65.8	47.0	56.2	74.3	79.0	94.5	93.9	84.4	-10.2
Radio and music stores	101	2,989,600	2,326,000	2,263,000	100.0	76.7	49.3	42.5	50.9	58.4	72.7	77.8	75.7	- 2.7
Restaurants, Cafeterias and Eating Places	634	10,135,000	7,677,000	7,071,000	100.0	78.2	55.8	51.5	57.9	63.9	71.5	75.7	69.8	- 7.9
Other Retail Stores	1,801	54,167,400	49,359,000	47,708,000	100.0	82.7	64.3	59.9	66.6	72.6	81.3	91.1	88.1	- 3.3
Farmers' supply stores	115	11,341,200	11,604,000	10,943,000	100.0	83.6	67.1	61.8	75.1	83.3	89.8	102.3	96.5	- 5.7
Book stores	36	793,900	644,000	601,000	100.0	89.9	62.4	61.5	64.6	68.4	73.3	81.1	75.7	- 6.6
Coal and wood yards	181	5,699,200	3,259,000	2,972,000	100.0	85.7	72.1	58.2	47.6	52.3	55.7	57.2	52.1	- 8.8
Drug stores	268	6,530,400	5,655,000	5,615,000	100.0	88.8	75.6	67.9	72.4	74.9	79.9	86.6	86.0	- 0.7
Florists	70	761,600	533,000	549,000	100.0	76.8	63.6	57.5	57.4	60.1	62.2	70.0	72.1	+ 3.0
Jewellery stores	137	2,668,200	2,377,000	2,310,000	100.0	76.8	54.6	53.6	66.8	76.3	84.9	89.1	86.6	- 2.8
Office, school and store supplies and equipment dealers	38	1,210,600	1,131,000	1,086,000	100.0	66.2	45.4	40.5	50.5	60.1	76.7	93.4	89.7	- 4.0
Tobacco stores and stands	198	2,900,800	2,633,000	2,570,000	100.0	83.7	72.6	68.3	72.3	76.5	83.1	90.8	88.6	- 2.4
Government liquor stores	73	14,735,400	14,110,000	13,738,000	100.0	84.3	61.7	59.7	68.8	75.8	86.5	95.8	93.2	- 2.6
Miscellaneous kinds of business (includes secondhand stores)	685	7,526,100	7,413,000	7,324,000	100.0	74.7	53.0	54.3	60.2	64.5	80.7	98.5	97.3	- 1.2

(1) The numbers of stores are shown only for 1930. Total sales figures for later years are estimated upon the basis of returns from a sample number of firms. The total number of stores in operation in these later years is not known.

(2) Sales figures for filling stations for years subsequent to 1930 have been estimated from data on gasoline consumption and retail prices.

NOTE: In a number of cases group totals include figures for classifications not separately shown.

BRITISH COLUMBIA - RETAIL MERCHANDISE TRADE, 1938.

Table 2.--Number of Chains, Chain Stores, Total Chain Store Sales and Percentage of Chain Store Sales to Total Sales, by Years

	1930	1933	1937	1938
ALL STORES, TOTAL -				
Chains	95	81	77	77
Stores (maximum)	692	740	696	708
Chain sales	\$ 47,875,300	\$ 32,405,600	\$ 46,497,900	\$ 45,510,500
Total sales	\$248,597,500	\$155,747,000	\$232,740,000	\$222,386,000
%, chains to total	19.3	20.8	20.0	20.5
Grocery and Combination Stores and Meat Markets -				
Chains	19	17	15	14
Stores (maximum)	244	282	292	281
Chain sales	\$ 10,117,100	\$ 8,862,400	\$ 11,888,200	\$ 11,199,600
Total sales	\$ 37,196,100	\$ 24,455,000	\$ 31,308,000	\$ 30,575,000
%, chains to total	27.2	36.2	38.0	36.6
Variety Stores -				
Chains	3	3	3	3
Stores (maximum)	21	21	22	22
Chain sales	\$ 2,769,700	\$ 2,301,300	\$ 3,176,000	\$ 3,250,500
Total sales	\$ 3,640,000	\$ 3,025,000	\$ 4,297,000	\$ 4,375,000
%, chains to total	76.1	76.1	73.9	74.3
Shoe Stores -				
Chains	3	5	4	4
Stores (maximum)	19	27	26	28
Chain sales	\$ 619,400	\$ 640,000	\$ 539,000	\$ 590,200
Total sales	\$ 3,078,200	\$ 2,062,000	\$ 2,495,000	\$ 2,473,000
%, chains to total	20.1	31.0	21.6	23.9
Restaurants, Cafeterias and Eating Places -				
Chains	7	6	4	5
Stores (maximum)	34	25	17	28
Chain sales	\$ 1,213,000	\$ 691,500	\$ 263,400	\$ 732,300
Total sales	\$ 10,135,000	\$ 5,220,000	\$ 7,677,000	\$ 7,071,000
%, chains to total (1)	12.0	13.3	3.4	10.4
Drug Stores -				
Chains	4	3	3	4
Stores (maximum)	41	39	43	50
Chain sales	\$ 2,042,500	\$ 1,367,500	\$ 1,729,200	\$ 1,923,600
Total sales	\$ 6,530,400	\$ 4,434,000	\$ 5,655,000	\$ 5,615,000
%, chains to total	31.3	30.8	30.6	34.3

Note: In some instances, figures for years subsequent to 1930 have been revised.

(1) Large change in chain ratio for restaurants between 1937 and 1938 due to re-classification of one firm from independent to chain store category.

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