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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS.

Retail Merchandise Trade in Ontario, 1934

Retail trade in Ontario for the year 1934 amounted to \$815,982,000, according to calculations made by the Bureau of Statistics and based upon reports received for the annual Census of Merchandising and Service Establishments. This figure represents an increase of approximately 11 per cent in value of sales over 1933 and it is also 3.8 per cent higher than the amount recorded for 1932. Representing the value of retail trade for 1930 by 100, sales for the following years may be represented by 86.4 for 1931, 71.5 for 1932, 66.9 for 1933, and 74.2 for 1934.

While increases in trade were recorded for practically all lines of business, the greatest gain over 1933 was experienced by motor vehicle dealers. The total business of these establishments for 1934, including the sale of both new and used vehicles, amounted to \$87,818,000, an increase of 38.8 per cent over the figure reported for 1933, and was about on a par with the business transacted in 1931. Other kinds of business which experienced marked upward movements in 1934, together with percentage increases over 1933, are as follows: Household appliance stores, 31.2 per cent; lumber and building material dealers, 25.5 per cent; office, school and store supply and equipment dealers, 24.1 per cent; radio and music stores, 19.2 per cent; men's clothing stores, 16.2 per cent; and furniture stores, 16.2 per cent.

Sales of grocery stores (including grocery stores with meat departments) were \$131,415,000 for 1934, an increase of 4.2 per cent over the amount recorded for 1933 and approximately equal to the 1932 figure. Sales of meat markets for 1934 were \$23,427,000 or 14.5 per cent higher than in 1933. Value of sales for country general stores showed an increase over 1933 of 11.7 per cent; for department stores the increase was 6.2 per cent; for women's apparel and accessories stores, 7.0 per cent; for hardware stores, 14.0 per cent; for coal and wood yards, 2.6 per cent; and for drug stores, 4.2 per cent.

Chain Store Sales.--For all retail trade in the province as a whole, the percentage of chain store sales to total sales has varied but slightly since 1930, the first year for which figures are available. In that year chain stores did 19.5 per cent of the total business of the province while in 1933 the ratio was 20.5 per cent. In 1934 chain store sales amounted to \$162,096,200 or 19.9 per cent of the total business of all stores. This figure includes the Ontario sales of all retail organizations operating four or more units, exclusive only of department stores. For the Census of Merchandising, all department stores have been treated as independent establishments so that data for ownership groups of department stores are not included in the chain store figures mentioned above.

Of the total sales of all grocery and combination stores in Ontario in 1934 amounting to \$131,415,000, chain store sales were \$54,180,500 or 41.2 per cent. In 1933 the corresponding ratio was 41.9 per cent while in 1930 it was 38.9 per cent. The ratios of chain store sales to total sales for 1934 for certain other kinds of business, together with the corresponding ratios for 1933 in brackets, are as follows: Variety,

5-and-10, and to-a-dollar stores, 94.2 (94.5); filling stations, 35.8 (31.9); shoe stores, 31.1 (27.6); household appliance stores, 52.6 (44.9); and drug stores, 22.2 (22.4).

Scope of Census.--This report is based upon returns received from all chain store companies and from a representative number of independent stores operating in the various lines of business for which data are shown in the attached tables. In all, including both chain stores and independent stores, returns were received covering approximately 10,000 establishments in Ontario and it is estimated that these transacted about 70 per cent of the total business of all retail stores in the province. The reports which have been secured have been used to determine the most probable value of sales for those units which do not report to the annual census, so that the figures given in this report relate to all retail trade and not only to the business transacted by the reporting firms. Since reports are not received from all stores for this annual census, it is not possible to state the total number of trading establishments operating during the year. Table 1 shows the value of sales for each year from 1930 to 1934 for all retail trade in the province as a whole and also for the various kind-of-business classifications used in this Census. Indexes of sales (1930 = 100) are also shown together with the percentage change in sales between 1933 and 1934. In Table 2 a comparison is made as between chain store sales and total sales. Table 3 presents a comparison for 1933 and 1934 of sales by departments of department stores. Supplementary tables are in course of preparation showing employment and wage figures, gross margin percentages, and value of inventory on hand at the close of the year. A detailed analysis classifying employees engaged in retail trade on the basis of weekly wage payments is also being prepared.

# ONTARIO RETAIL MERCHANDISE TRADE, 1934

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

Kind of Business	Total Net Sales					Index of Retail Sales (1930 = 100.0)					% of Change 1933-1934
	1930	1931	1932	1933	1934	1930	1931	1932	1933	1934	
	\$	\$	\$	\$	\$						
Total, All Stores .....	1,099,990,200	950,891,000	786,082,000	735,861,000	815,982,000	100.0	86.4	71.5	66.9	74.2	+10.9
Food Group .....	255,936,200	221,951,000	191,937,000	181,519,000	192,590,000	100.0	86.7	75.0	70.9	75.2	+ 6.1
Bakery product stores (manufacturing bakeries not included) .....	5,022,100	4,520,000	3,706,000	3,455,000	3,822,000	100.0	90.0	73.8	68.8	76.1	+10.6
Candy and confectionery stores .....	15,762,100	12,956,000	11,223,000	10,293,000	11,216,000	100.0	82.2	71.2	65.3	71.2	+ 9.0
Dairy product dealers (other than manufacturing dairies) .....	14,172,900	12,756,000	11,664,000	11,480,000	12,431,000	100.0	90.0	82.3	81.0	87.7	+ 8.3
Fruit and vegetable stores .....	10,255,000	8,953,000	8,071,000	7,539,000	8,074,000	100.0	87.3	78.7	74.0	78.7	+ 6.4
Grocery and combination stores .....	172,225,300	152,075,000	132,814,000	126,070,000	131,415,000	100.0	88.4	76.0	72.9	76.0	+ 4.2
Meat markets (including sea foods) .....	23,814,000	26,747,000	21,979,000	20,458,000	23,427,000	100.0	79.1	65.0	60.5	69.3	+14.5
Other food stores .....	3,974,800	3,144,000	2,480,000	2,174,000	2,205,000	100.0	77.1	62.4	54.7	55.5	+ 1.4
Country General Stores .....	48,666,000	40,135,000	24,415,000	33,310,000	37,210,000	100.0	83.5	72.6	65.3	77.4	+11.7
General Merchandise Group .....	120,383,600	166,047,000	113,870,000	124,236,000	132,893,000	100.0	92.1	74.2	68.9	72.7	+ 7.0
Department stores .....	140,148,400	129,487,000	101,577,000	94,492,000	100,343,000	100.0	92.4	72.5	67.4	71.6	+ 6.2
Dry goods stores .....	13,211,500	11,111,000	7,485,000	8,376,000	9,162,000	100.0	84.1	71.8	63.4	69.3	+ 9.4
General merchandise stores .....	7,392,500	6,269,000	4,960,000	4,524,000	5,179,000	100.0	84.8	67.1	61.2	70.0	+14.5
Variety stores .....	19,651,100	19,180,000	17,147,000	16,844,000	18,214,000	100.0	97.7	90.4	85.2	92.8	+ 8.1
Automotive Group .....	157,410,500	128,328,000	110,775,000	105,035,000	128,452,000	100.0	82.6	66.2	62.7	76.2	+20.8
Motor vehicle dealers .....	109,680,100	97,963,000	64,602,000	63,285,000	87,813,000	100.0	89.2	58.9	57.7	80.1	+38.8
Accessories, tires and batteries .....	5,453,600	4,232,000	3,730,000	3,430,000	3,197,000	100.0	77.6	68.4	62.9	53.6	- 6.8
Filling stations .....	34,756,300	30,385,000	29,334,000	26,415,000	25,264,000	100.0	90.3	84.4	76.0	72.7	- 1.4
Garages .....	15,931,600	13,558,000	12,172,000	10,977,000	11,243,000	100.0	85.1	76.4	68.9	70.6	+ 2.4
Other automotive establishments (including motorcycles, bicycles and supplies) ...	1,588,900	1,190,000	939,000	898,000	930,000	100.0	74.9	59.1	56.5	58.5	+ 3.5
Apparel Group .....	23,711,300	8,721,000	62,225,000	64,222,000	7,244,000	100.0	87.2	72.2	68.3	76.0	+11.3
Men's and boys' clothing and furnishings (includes custom tailors) .....	32,327,700	26,444,000	20,787,000	19,655,000	22,873,000	100.0	81.8	64.3	60.8	70.8	+16.4
Family clothing stores .....	14,832,300	13,642,000	12,010,000	12,040,000	13,965,000	100.0	91.3	80.7	81.9	93.3	+16.0
Women's apparel and accessories stores ..	30,326,200	27,142,000	22,169,000	20,228,000	21,648,000	100.0	89.5	73.2	66.7	71.4	+ 7.0
Shoe stores .....	16,175,100	14,509,000	12,649,000	12,099,000	12,760,000	100.0	89.7	78.2	74.8	78.9	+ 5.5

ONTARIO RETAIL MERCHANDISE TRADE, 1934

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

Kind of Business	Total Net Sales					Index of Retail Sales (1930 = 100.0)					Change 1933-1934
	1930	(Estimated)				1930	1931	1932	1933	1934	
		1931	1932	1933	1934						
	\$	\$	\$	\$	\$						
Building Materials Group .....	61,398,100	50,734,000	37,255,000	32,758,000	38,688,000	100.0	82.6	60.7	53.4	63.0	+18.1
Hardware stores .....	27,752,300	24,089,000	19,038,000	17,428,000	19,860,000	100.0	86.8	68.6	62.8	71.6	+14.0
Lumber and building materials .....	21,950,000	16,704,000	11,612,000	9,914,000	12,441,000	100.0	76.1	52.9	45.2	56.7	+25.5
Other building materials (including roofing materials) .....	3,894,200	3,497,000	1,776,000	1,203,000	1,649,000	100.0	89.8	45.6	30.9	42.3	+37.0
Electrical shops (without radio) .....	7,801,600	6,444,000	4,829,000	4,213,000	4,738,000	100.0	82.6	61.9	54.0	60.7	+12.5
Heating and plumbing shops .....											
Paint and glass stores .....											
Furniture and Household Group ...	43,713,000	35,285,000	26,479,000	22,887,000	27,431,000	100.0	80.7	60.6	52.4	62.8	+19.9
Furniture stores .....	17,928,100	14,880,000	11,438,000	10,129,000	11,773,000	100.0	83.0	63.8	56.5	65.7	+16.2
Household appliance stores .....	7,505,400	6,522,000	5,276,000	4,548,000	5,966,000	100.0	86.9	70.3	60.6	79.5	+31.2
Other home furnishings (including floor coverings, curtains, etc.) .....	3,777,000	2,803,000	2,093,000	2,017,000	2,310,000	100.0	74.2	55.4	53.4	61.2	+14.6
Radio and music stores .....	14,502,500	11,080,000	7,672,000	6,193,000	7,382,000	100.0	76.4	52.9	42.7	50.9	+19.2
Restaurants, Cafeterias and Eating Places .....	28,633,600	23,995,000	19,013,000	17,008,000	18,244,000	100.0	83.8	66.4	59.4	63.7	+ 7.3
Other Retail Stores .....	220,737,900	192,659,000	164,721,000	155,116,000	169,223,000	100.0	87.3	74.6	70.3	76.7	+ 9.1
Farmers' supplies .....	15,046,100	11,792,000	10,024,000	9,944,000	11,694,000	100.0	78.4	66.6	66.1	77.7	+17.6
Book stores .....	4,200,900	3,627,000	3,002,000	2,649,000	2,739,000	100.0	86.3	71.5	63.1	65.2	+ 3.4
Coal and wood yards .....	45,212,700	39,697,000	36,170,000	38,386,000	39,395,000	100.0	87.8	80.0	84.9	87.1	+ 2.6
Ice dealers .....	2,268,000	2,282,000	2,053,000	2,025,000	2,072,000	100.0	100.6	90.5	89.3	91.4	+ 2.3
Drug stores .....	35,207,500	33,201,000	30,490,000	27,462,000	28,610,000	100.0	94.3	86.6	78.0	81.3	+ 4.2
Florists .....	4,600,000	3,827,000	3,271,000	2,880,000	3,123,000	100.0	83.2	71.1	62.6	67.9	+ 8.5
Jewellery stores .....	11,338,500	9,286,000	7,710,000	6,848,000	7,509,000	100.0	81.9	68.0	60.4	66.2	+ 9.6
Office, school and store supplies and equipment dealers .....	9,170,300	7,721,000	5,860,000	5,255,000	6,520,000	100.0	84.2	63.9	57.3	71.1	+24.1
Tobacco stores and stands .....	15,407,200	13,974,000	12,449,000	11,232,000	11,941,000	100.0	90.7	80.8	72.9	77.5	+ 6.3
Government liquor stores .....	34,764,300	29,550,000	22,805,000	18,668,000	18,980,000	100.0	85.0	65.6	53.7	54.6	+ 1.7
Brewers' warehouses .....	14,894,400	13,569,000	10,590,000	9,756,000	14,087,000	100.0	91.1	71.1	65.5	94.6	+44.4
Unclassified kinds of business .....	28,628,000	24,133,000	20,297,000	20,011,000	22,553,000	100.0	84.3	70.9	69.9	78.8	+12.7

ONTARIO RETAIL MERCHANDISE TRADE, 1934

Table 2.--Comparison of Chain Store Sales and Total Sales, by Years

	1930	1931	1932	1933	1934
ALL STORES, Total Sales .	\$1,099,990,200	950,891,000	786,082,000	735,861,000	815,982,000
Chain store sales.	\$ 214,391,300	195,362,900	163,814,600	150,908,000	162,096,400
%, chains to total	19.5	20.6	20.8	20.5	19.9
Grocery and Combination Stores, Total Sales ...	\$ 172,935,300	152,875,000	132,814,000	126,070,000	131,415,000
Chain store sales.	\$ 67,211,400	64,130,400	55,944,700	52,782,100	54,180,500
%, chains to total	38.9	42.0	42.1	41.9	41.2
Variety, 5-and-10, and to-a-dollar Stores, Total Sales .....	\$ 19,631,200	19,180,000	17,747,000	16,844,000	18,214,000
Chain store sales.	\$ 18,408,300	18,051,500	16,728,500	15,917,900	17,151,100
%, chains to total	93.8	94.1	94.3	94.5	94.2
Filling Stations, Total Sales .....	\$ 34,756,300	31,385,000	29,334,000	26,415,000	25,264,000
Chain station sales	\$ 9,332,900	9,724,300	9,197,400	8,432,700	9,042,300
%, chains to total	26.9	31.0	31.4	31.9	35.8
Men's and Boys' Clothing & Furnishings (includes custom tailors), Total Sales .....	\$ 32,327,700	26,444,000	20,787,000	19,655,000	22,873,000
Chain store sales.	\$ 6,357,500	5,111,900	3,439,900	3,106,200	4,005,400
%, chains to total	19.7	19.3	16.6	15.8	17.5
Family Clothing Stores, Total Sales .....	\$ 14,882,300	13,662,000	12,010,000	12,040,000	13,965,000
Chain store sales.	\$ 2,521,200	2,467,100	2,243,900	2,259,200	2,688,800
%, chains to total	16.9	18.1	18.7	18.8	19.3
Women's Apparel and Accessories Stores, Total Sales .....	\$ 30,326,200	27,142,000	22,169,000	20,228,000	21,648,000
Chain store sales.	\$ 2,894,800	2,439,800	1,945,200	1,660,600	1,708,600
%, chains to total	9.6	9.0	8.8	8.2	7.9
Shoe Stores, Total Sales.	\$ 16,175,100	14,509,000	12,649,000	12,099,000	12,760,000
Chain store sales.	\$ 3,290,200	3,339,000	3,137,900	3,336,600	3,963,400
%, chains to total	20.3	23.0	24.8	27.6	31.1
Household Appliance Stores, Total Sales ...	\$ 7,505,400	6,522,000	5,276,000	4,548,000	5,966,000
Chain store sales.	\$ 3,403,800	2,813,100	2,446,400	2,041,300	3,138,300
%, chains to total	45.4	43.1	46.4	44.9	52.6
Restaurants, Cafeterias and Eating Places, Total Sales .....	\$ 28,633,600	23,995,000	19,013,000	17,008,000	18,244,000
Chain store sales.	\$ 5,962,800	4,856,700	3,627,000	3,024,900	2,870,200
%, chains to total	20.8	20.2	19.1	17.8	15.7
Drug Stores, Total Sales.	\$ 35,207,500	33,201,000	30,490,000	27,462,000	28,610,000
Chain store sales.	\$ 6,989,200	7,280,400	6,974,500	6,163,800	6,344,400
%, chains to total	19.9	21.9	22.9	22.4	22.2

ONTARIO RETAIL MERCHANDISE TRADE, 1934

Table 3.--Sales by Commodity Groups for Department Stores, 1933 and 1934

Department	Sales in 1933	Sales in 1934	% of Change
Total Sales, All Departments .....	94,491,500	100,343,100	+ 6.2
Apparel and accessories, women's, misses' and children's (including furs, fur goods, infants' wear, hosiery, gloves, lingerie, etc.) .....	24,009,400	25,444,200	+ 6.0
Automotive supplies (including tires, batteries, automotive parts) .....	458,900	541,900	+18.1
Cafeterias and restaurants (including fountain and lunch rooms) .....	1,925,200	1,967,300	+ 2.2
Clothing and furnishings, men's and boys' (including hats and caps) .....	11,003,800	11,798,300	+ 7.2
Drugs and toilet articles and preparations (including cameras and photographic supplies) .....	2,369,600	2,215,900	- 6.5
Dry goods and notions (including piece goods - silks, woollens, cottons, linens - ribbons, laces, embroideries, buttons, thread, patterns, yarns) ....	8,664,300	9,040,600	+ 4.3
Farm and garden equipment and supplies (including farm machinery, harness, seeds, etc.) .....	526,100	590,500	+12.2
Food and kindred products (groceries, meats, provisions, candies, fruit and vegetables) .....	5,787,300	5,454,600	- 5.7
Furniture (including mattresses, springs) .....	5,289,600	5,757,400	+ 8.8
Hardware and kitchen utensils (including paints, wallpaper) .....	3,220,700	3,401,600	+ 5.6
Home furnishings (draperies, curtains, bedding, table linen, china, glassware, pictures, window shades, floor coverings) .....	9,449,000	10,682,900	+13.1
Household appliances and electrical supplies (washing machines, sewing machines, electric irons, vacuum cleaners, refrigerators, stoves, electrical fixtures, lamps) .....	2,457,900	2,750,100	+11.9
Jewellery and optical goods (including clocks, watches, silverware, plated ware) .....	1,975,100	2,141,800	+ 8.4
Leather goods and travelling goods (including purses and hand-bags) .....	936,100	1,048,300	+12.0
Millinery .....	1,622,800	1,695,700	+ 4.5
Radios, musical instruments, and supplies .....	1,543,800	1,696,100	+ 9.9
Shoes and other footwear (men's, women's and children's) .....	7,596,400	7,918,600	+ 4.2
Sporting goods (including bicycles, toys, games) .....	2,109,300	2,346,200	+11.2
Stationery, books and magazines .....	1,483,000	1,514,000	+ 2.1
Receipts from repair or service departments, not included elsewhere (such as hairdressing, electrical contracting, fur storage, interior decorating) .....	1,379,700	1,397,900	+ 1.3
Miscellaneous merchandise (Specify principal departments included here, giving figures for each one whose sales amount to more than 5 per cent of total store sales) .....	683,500	939,200	+37.4

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