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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

RETAIL MERCHANDISE TRADE
IN
ONTARIO
CALENDAR YEAR
1938

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Retail Trade in Ontario, 1938

Retail sales in Ontario were only 3 per cent lower in 1938 than in the preceding year and exceeded by 8 per cent the dollar volume of retail trading in 1936, according to calculations for the annual survey of retail trade conducted by the Internal Trade Branch of the Bureau of Statistics. Total retail merchandise sales are estimated at \$988,696,000 for 1938 compared with \$1,022,068,000 for 1937 and \$913,233,000 for 1936. Indexes of sales on the base 1930 = 100 stand at 89.9 for 1938 compared with 92.9 and 83.0 for the two preceding years. The proportion of total retail store sales transacted by chains increased from 18.1 per cent in 1937 to 18.8 per cent in 1938. There were 235 chain store companies operating in Ontario in 1938 and these had 3,114 unit stores with \$185,901,800 sales. In the preceding year there were 230 chain companies with 3,180 unit stores and \$184,973,100 sales.

Practically all lines of retail dealing registered minor declines from 1937. Total sales of motor vehicle dealers, which had been expanding at a rapid rate in earlier years since 1933, declined by 8 per cent in 1938 from the preceding year. There were 56,524 new motor vehicles sold for \$63,063,368 in Ontario last year, down 15 per cent in number and 9 per cent in value from 1937. Declines from 1937 were similar for passenger and commercial makes. There were 47,514 new passenger cars sold for \$52,050,180 in Ontario last year while commercial models numbering 9,010 sold for \$11,013,188. Information regarding the sale of used vehicles is not available.

Country general store sales declined by 3 per cent while department store sales were off 4 per cent, indicating similar trends in consumer purchasing for rural and urban areas. Food store sales were maintained within 1 per cent of the 1937 level. Hardware store sales were down by 1 per cent while lumber and building material dealers did 4 per cent less business than in the preceding year. Declines ranging from 5 to 9 per cent were general in the furniture and household furnishings group of stores and a similar reduction was reported by the apparel group. Stores dealing in men's and boys' clothing and furnishings reported 11 per cent less business than in 1937 while women's apparel stores were down by 5 per cent. Shoe store sales declined by 3 per cent. Coal and woodyard sales were down by 3 per cent; drug stores, 2 per cent; and jewellery stores, 5 per cent. Tobacco stores and government liquor stores both reported an increase of one per cent in business.

Chain Stores

There were 235 chain store companies in Ontario last year and these operated a total of 3,114 stores within the province and had \$185,901,800 sales. Chains accounted for 18.8 per cent of the total retail business last year compared with 18.1 per cent for 1937, 19.9 per cent in 1936 and 19.5 per cent in 1930, the first year for which figures are available.

Notwithstanding a slight reduction in the number of stores in operation, chains in the food retailing field secured a slightly greater proportion of the total business in 1938 than in 1937. There were 39 chain companies in this field last year and these operated 1,011 stores and had \$65,760,600 sales, an amount which formed 44.9 per cent of the total sales of all grocery and combination stores. In the previous year there were 35 chains with 1,022 stores and these obtained 42.9 per cent of the total business.

Results for other lines of business in which chains are of importance show but little change in the position occupied by chains and independents. Men's and boys' clothing store chains secured 18.2 per cent of the business of all such stores. Chain ratios for other lines of business with 1937 figures in brackets are: women's apparel stores, 14.7 per cent (12.8 per cent); shoe stores, 35.9 per cent (34.7 per cent); restaurants, 16.7 per cent (15.0 per cent) and drug stores, 23.6 per cent (23.7 per cent).

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 the 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.

Note: Figures covering the sale of new vehicles represent annual aggregates of monthly reports compiled by the D.B.S.

ONTARIO - RETAIL MERCHANDISE TRADE, 1938
Table 1.--Total Net Sales and Sales Indexes, by Kinds of Business

Kind of Business	Stores and Sales, 1930		Estimated Sales		Indexes of Retail Sales									% of Change, 1938/1937
	Number(1) of Stores	Total Net Sales	(add 000)		(1930 = 100)									
			1937	1938	1930	1931	1932	1933	1934	1935	1936	1937	1938	
		\$	\$	\$										
Total, All Stores	43,045	1,099,990,200	1,022,068	968,696	100.0	86.6	71.3	67.4	74.9	78.0	83.0	92.9	89.6	- 3.3
Food Group	14,263	255,936,200	218,715	217,625	100.0	86.7	75.0	70.9	75.2	76.6	79.9	85.3	85.0	- 0.3
Candy and confectionery stores	2,105	15,762,100	12,906	12,558	100.0	82.2	71.2	65.3	71.2	73.4	75.9	81.9	79.7	- 2.7
Fruit and vegetable stores	376	10,255,000	8,827	8,650	100.0	87.3	78.7	74.0	78.7	79.3	83.5	86.1	84.3	- 2.0
Grocery and combination stores	7,708	172,935,300	147,341	146,604	100.0	88.4	76.8	72.9	76.0	76.3	79.8	85.2	84.8	- 0.5
Meat markets (including sea foods) ...	1,687	33,814,000	27,052	25,836	100.0	79.1	65.0	60.5	69.3	73.5	74.7	80.0	79.4	- 0.8
Country General Stores	2,662	48,066,000	42,053	40,749	100.0	83.5	71.6	69.3	77.4	77.7	81.8	87.5	84.8	- 3.1
General Merchandise Group	979	180,383,600	153,491	147,893	100.0	92.1	74.2	68.9	73.7	74.8	79.1	85.1	82.0	- 3.6
Department stores	61	140,148,400	113,278	108,860	100.0	92.4	72.5	67.4	71.6	72.0	75.9	80.8	77.7	- 3.9
Dry goods stores	570	13,211,500	10,149	9,682	100.0	84.1	71.8	63.4	69.3	69.8	72.0	76.8	73.3	- 4.6
General merchandise stores	127	7,392,500	6,170	5,343	100.0	84.8	67.1	61.2	70.0	69.4	73.8	83.5	72.3	- 13.4
Variety stores	221	19,631,200	23,894	24,008	100.0	97.7	90.4	85.8	92.8	99.9	108.7	121.7	122.3	+ 0.5
Automotive Group	5,481	167,410,500	211,607	201,168	100.0	83.5	62.6	66.2	82.1	92.0	100.3	126.4	120.2	- 4.9
Motor vehicle dealers	1,018	109,660,100	150,206	138,190	100.0	80.2	58.9	57.7	80.1	93.5	105.6	136.9	126.0	- 6.0
Accessories, tires and batteries	285	5,453,600	4,721	4,929	100.0	77.6	68.4	62.9	58.6	58.7	74.2	86.6	90.4	+ 4.4
Filling stations(2)	2,754	34,756,300	42,055	43,063	100.0	94.3	96.1	92.6	93.7	103.3	100.2	121.0	123.9	+ 2.4
Garages	1,294	15,931,600	13,479	13,749	100.0	85.1	76.4	68.9	70.6	71.8	75.2	84.6	85.3	+ 2.0
Apparel Group	4,484	92,711,300	84,796	78,445	100.0	87.2	72.2	63.3	76.0	75.3	84.4	90.5	83.7	- 7.5
Men's and boy's clothing and furnish- ings (includes custom tailors)	1,562	32,327,700	28,306	25,277	100.0	81.8	64.3	60.8	70.8	75.1	80.8	87.6	72.2	- 10.7
Family clothing stores	471	14,882,300	17,267	15,627	100.0	91.8	80.7	80.9	93.8	99.7	107.3	116.0	105.0	- 9.5
Women's apparel and accessories stores	1,569	30,326,200	24,531	23,231	100.0	89.5	73.1	66.7	71.4	72.9	77.0	80.9	76.6	- 5.3
Shoe stores	782	16,175,100	14,692	14,310	100.0	89.7	78.2	74.8	78.9	80.8	84.6	90.8	88.5	- 2.6
Building Materials Group	2,030	61,398,100	51,771	50,688	100.0	82.6	60.7	53.4	63.0	66.3	74.4	84.3	82.6	- 2.1
Hardware stores	1,135	27,752,300	25,368	25,038	100.0	86.8	68.6	62.8	71.6	74.5	82.0	91.4	90.2	- 1.3
Lumber and building material dealers .	297	21,950,000	17,582	16,861	100.0	76.1	52.9	45.2	56.7	60.3	69.8	80.1	76.8	- 4.1
Other building materials	91	3,894,200	2,592	2,709	100.0	89.8	45.6	30.9	42.3	45.9	57.5	66.6	69.6	+ 4.5
Electrical, heating and plumbing, paint and glass shops	507	7,801,600	6,229	6,080	100.0	82.6	61.9	54.0	60.7	63.7	69.1	79.8	77.9	- 2.4

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

ONTARIO - RETAIL MERCHANDISE TRADE, 1938

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

Kind of Business	Stores and Sales, 1930:		Estimated Sales		Indexes of Retail Sales									% of Change, 1938/1937
	Number(1) of Stores	Total Net Sales	(add 000)		(1930 = 100)									
			1937	1938	1930	1931	1932	1933	1934	1935	1936	1937	1938	
Furniture and Household Group	1,429	43,713,000	36,666	34,162	100.0	80.7	60.6	52.4	60.5	67.4	72.6	83.9	78.2	- 6.8
Furniture stores	523	17,928,100	16,201	15,148	100.0	83.0	63.8	56.5	65.7	73.5	78.0	90.4	84.5	- 6.5
Household appliance stores	263	7,505,400	6,635	6,237	100.0	86.9	70.3	(3)	66.3	74.0	75.6	88.4	83.1	- 6.0
Other home furnishings stores	238	3,777,000	3,051	2,914	100.0	74.2	55.4	53.4	61.2	62.2	72.8	80.8	77.2	- 4.5
Radio and music stores	405	14,502,500	10,779	9,863	100.0	76.4	52.9	42.7	50.9	57.9	64.2	74.3	68.0	- 8.5
Restaurants, Cafeterias and Eating Places	2,306	28,633,600	21,052	19,999	100.0	83.8	66.4	59.4	63.7	65.3	69.4	73.5	69.8	- 5.0
Other Retail Stores	9,411	220,737,900	201,916	197,967	100.0	87.3	74.6	70.3	76.7	78.0	82.6	91.5	89.7	- 2.0
Farmers' supply stores	794	15,046,100	16,615	15,120	100.0	78.4	66.6	66.1	77.7	78.1	84.0	110.4	100.5	- 9.0
Book stores	177	4,200,900	3,569	3,540	100.0	86.3	71.5	63.1	65.2	69.2	74.7	85.0	84.3	- 0.8
Coal and wood yards	835	45,212,700	44,514	43,134	100.0	87.8	80.0	84.9	87.1	89.3	94.8	98.5	95.4	- 3.1
Drug stores	1,464	35,207,500	32,854	32,230	100.0	94.3	86.6	78.0	81.3	83.8	87.0	93.3	91.5	- 1.9
Florists	390	4,600,000	3,634	3,514	100.0	83.2	71.1	62.6	67.9	69.0	72.2	79.0	76.4	- 3.3
Jewellery stores	606	11,338,500	9,986	9,467	100.0	81.9	68.0	60.4	66.2	70.8	78.1	88.1	83.5	- 5.2
Office, school and store supplies and equipment dealers	139	9,170,300	9,120	8,719	100.0	84.2	63.9	57.3	71.1	77.9	87.2	99.5	95.1	- 4.4
Tobacco stores and stands	1,290	15,407,200	14,172	14,285	100.0	90.7	80.8	72.9	77.5	79.5	84.5	92.0	92.7	+ 0.8
Government liquor stores	122	34,764,300	22,304	22,469	100.0	85.0	65.6	53.7	54.6	52.0	55.9	64.2	64.6	+ 0.7
Miscellaneous kinds of business (including secondhand stores)	3,594	45,790,400	45,148	45,489	100.0	87.3	71.9	69.4	84.5	85.2	88.5	98.6	99.3	+ 0.8

(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.

(3) Figures for this classification for 1933 are not considered sufficiently complete to warrant publishing. They are included, however, in the group total.

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

ONTARIO - 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	250	217	230	235
Stores (maximum) ..	3,276	3,210	3,180	3,114
Chain sales	\$ 214,391,300	\$150,908,000	\$ 184,973,100	\$185,901,800
Total sales	\$1,099,990,200	\$741,630,000	\$1,022,068,000	\$988,696,000
%, chains to total	19.5	20.3	18.1	18.8
Grocery and Combination Stores -				
Chains	24	26	35	39
Stores (maximum) ..	1,020	1,038	1,022	1,011
Chain sales	\$ 67,211,400	\$ 52,782,100	\$ 63,210,100	\$ 65,760,600
Total sales	\$ 172,935,300	\$126,070,000	\$ 147,341,000	\$146,604,000
%, chains to total	38.9	41.9	42.9	44.9
Variety Stores -				
Chains	9	12	12	12
Stores (maximum) ..	152	176	225	233
Chain sales	\$ 18,408,300	\$ 15,917,900	\$ 22,441,700	\$ 22,516,700
Total sales	\$ 19,631,200	\$ 16,844,000	\$ 23,894,000	\$ 24,008,000
%, chains to total	93.8	94.5	93.9	93.8
Men's and Boy's Clothing and Furnishings (includes custom tailors)				
Chains	15	10	13	14
Stores (maximum) ..	117	76	96	103
Chain sales	\$ 6,357,500	\$ 3,106,200	\$ 4,935,500	\$ 4,589,700
Total sales	\$ 32,327,700	\$ 19,655,000	\$ 28,306,000	\$ 25,277,000
%, chains to total	19.7	15.8	17.4	18.2
Family Clothing Stores -				
Chains	10	9	11	12
Stores (maximum) ..	39	46	58	61
Chain sales	\$ 2,521,200	\$ 2,259,200	\$ 3,625,000	\$ 3,231,700
Total sales	\$ 14,882,300	\$ 12,040,000	\$ 17,267,000	\$ 15,627,000
%, chains to total	16.9	18.8	21.0	20.7
Women's Apparel and Accessories Stores -				
Chains	16	10	15	16
Stores (maximum) ..	90	75	104	128
Chain sales	\$ 2,894,800	\$ 1,660,600	\$ 3,141,800	\$ 3,408,200
Total sales	\$ 30,326,200	\$ 20,228,000	\$ 24,531,000	\$ 23,231,000
%, chains to total	9.6	8.2	12.8	14.7
Shoe Stores -				
Chains	8	10	11	10
Stores (maximum) ..	105	141	188	191
Chain sales	\$ 3,290,200	\$ 3,336,600	\$ 5,091,500	\$ 5,130,500
Total sales	\$ 16,175,100	\$ 12,099,000	\$ 14,692,000	\$ 14,310,000
%, chains to total	20.3	27.6	34.7	35.9
Restaurants, Cafeterias and Eating Places -				
Chains	12	10	7	8
Stores (maximum) ..	127	117	100	102
Chain sales	\$ 5,962,800	\$ 3,024,900	\$ 3,154,700	\$ 3,344,200
Total sales	\$ 28,633,600	\$ 17,008,000	\$ 21,052,000	\$ 19,999,000
%, chains to total	20.8	17.8	15.0	16.7
Drug Stores -				
Chains	11	13	14	14
Stores (maximum) ..	137	156	179	182
Chain sales	\$ 6,989,200	\$ 6,163,800	\$ 7,774,700	\$ 7,608,300
Total sales	\$ 35,207,500	\$ 27,462,000	\$ 32,854,000	\$ 32,230,000
%, chains to total	19.9	22.4	23.7	23.6

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

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