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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Retail Merchandise Trade in Quebec, 1930 - 1933

This bulletin on Retail Trade in Quebec for the period 1930 - 1933 is one of a series reporting the results of an annual census of merchandising establishments arising out of the Decennial Census taken in 1931 and covering the year 1930. While the latter included in its scope every retail establishment, the annual census includes all chain stores and those independent stores which reported sales for 1930 over a specified amount. The independent stores from which reports were secured were those with an annual turnover of \$30,000 or more in 1930 (\$20,000 or more in the case of food stores and country general stores) and which continued in business throughout the period. This means that approximately two-thirds of the retail business of the Dominion is covered in the annual census. From the reports thus received, and using the year 1930 as the base period, indexes of retail sales for each of the years 1931 to 1933 have been computed. These indexes have then been applied to the total sales of all stores in 1930 in order to arrive at estimates of the total annual business of all retail establishments in each of the following years.

While a large portion of retail trade has been covered in the current census, it is clear that the figures presented in this report for the years 1931, 1932 and 1933 are estimates based on indexes computed from the returns of the establishments reporting. The chief factor which may not be reflected in the sales indexes is a decline in the number of stores in certain kinds of business. No information is available to show the extent to which firms going out of business have not been replaced by new stores of a similar character. The possibility, therefore, of the sales of the surviving stores covered by this census not reflecting completely the trend in retail trade during the period from 1930 to 1933 must be noted. However, it is believed that for the provincial retail trade as a whole the figures may be taken as approximately correct and for certain kind-of-business groups as being more accurate than for others. Among the kind-of-business classifications which are believed to be most accurate are included: Grocery and combination stores, meat markets, department stores, variety stores, coal and wood yards, drug stores, and restaurants and other eating places.

Summary of Retail Sales.--The total sales of all retail establishments in Quebec during 1933 are estimated at \$421,141,000 or 64.7 per cent of the business transacted in 1930. The sales volume for each year from 1930 to 1933 and indexes of sales (base 1930 = 100) are as follows:

Groupe des matériaux de construction.— Les ventes des quincailleries en détail du Québec en 1930 se chiffrent à \$14,159,900. Le chiffre estimatif de 1933 est \$8,128,000 ou 57.4 p.c. de celui de 1930. Le commerce de détail du bois-d'oeuvre et des matériaux de construction accuse une plus grande diminution encore en 1933, les ventes n'atteignant que \$4,090,000 ou 38.8 p.c. de celles de 1930.

Meubles et articles de ménage.— Les ventes des magasins de meubles en 1933 sont estimées à \$6,635,000 ou 51.4 p.c. de leur volume de 1930. Les indices des ventes de 1931 et 1932 sont 86.5 et 59.7 respectivement. De tous les genres de commerce sur lesquels paraissent des chiffres séparés, les magasins de radio et de musique montrent la plus grande diminution au cours de la période sous revue. Le commerce de détail de ces magasins de radio et musique se chiffre à \$2,944,000 en 1933, ou 51.8 de 1930. Les indices de 1931 et 1932 sont 73.6 et 41.1 respectivement.

Restaurants, cafétérias et salles à manger.— Les ventes totales des restaurants, cafétérias et salles à manger en 1930 se chiffrent à \$17,205,300. En 1933, le montant correspondant est de \$8,809,000 ou 51.2 p.c. de 1930. Les indices des deux années intermédiaires sont 83.8 et 63.0 respectivement.

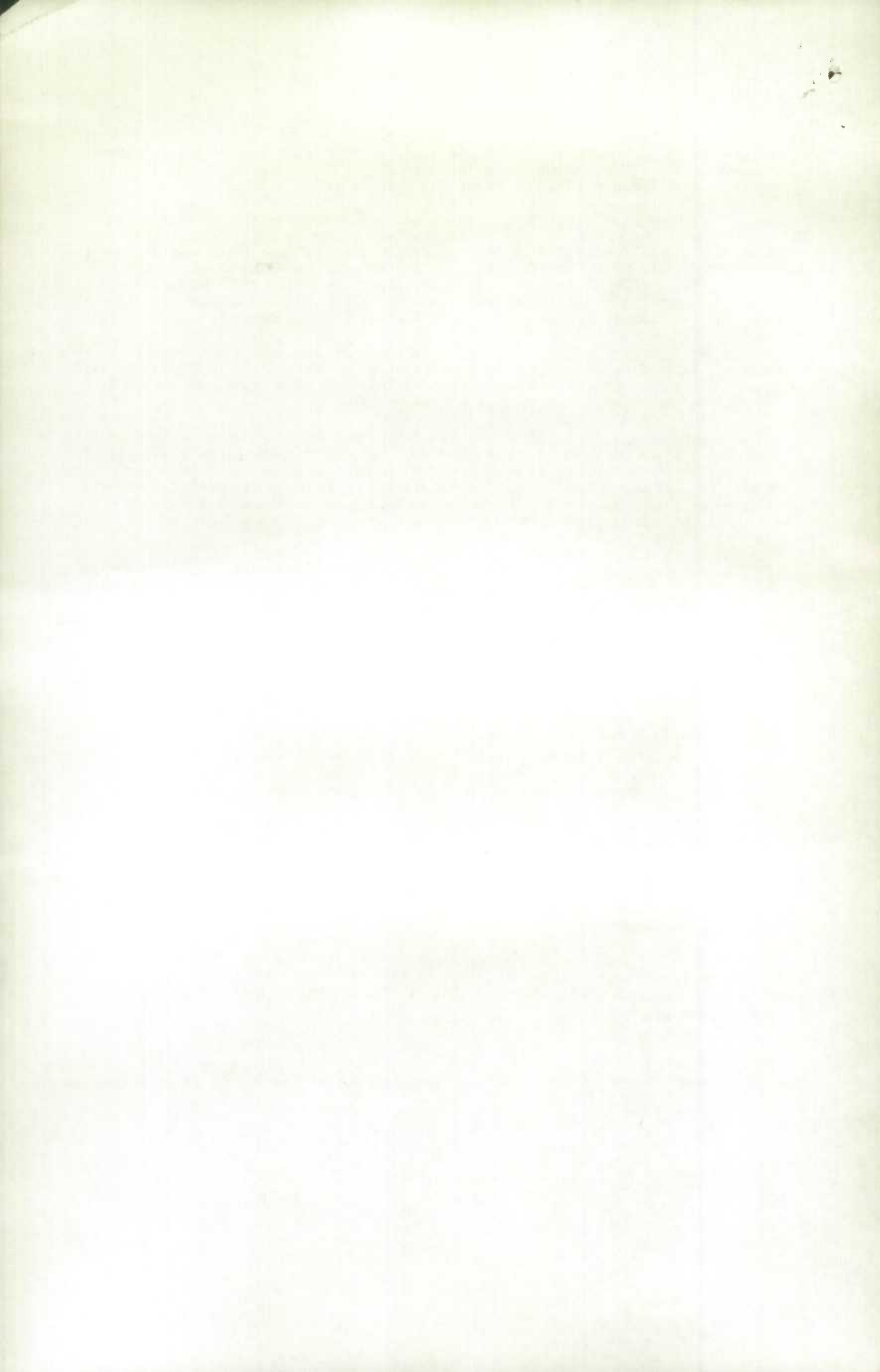
Autres magasins de détail.— Les ventes des cours à charbon et bois en 1933 se chiffrent à \$15,340,000 ou 90.9 p.c. de 1930. Les ventes estimatives de 1931 et 1932 sont égales, donnant chaque année 92.9 p.c. des affaires de 1930. Les ventes des pharmacies en 1933 donnent 76.2 p.c. de leur chiffre de 1930, tandis que l'indice des bijouteries en 1933 est de 53.3. Les ventes de détail des magasins de liqueur du gouvernement ont diminué de \$26,565,000 en 1930 à 47.8 p.c. de ce montant, ou \$12,705,000 en 1933.

Chaînes de magasins et leurs ventes.— Outre la classification de tous les magasins selon leur genre de commerce, certains tableaux établissent aussi une distinction entre les magasins en chaîne et les magasins indépendants. En 1930 il y avait 1,698 unités de magasin en chaîne, (sans compter les chaînes de magasins à rayons) en opération dans le Québec, ayant un volume de ventes au détail de \$117,100,400 ou 17.98 p.c. de toutes les ventes au détail de l'année. En 1933, le nombre d'anneaux de ces chaînes avait diminué légèrement, n'atteignant que 1,668, et leur chiffre d'affaires était de \$73,398,300 ou 17.43 p.c. de toutes les ventes des établissements de détail au cours de l'année. Les pourcentages du total des ventes des magasins en chaîne les deux années 1931 et 1932 sont 18.80 et 18.51 respectivement.

En outre des ventes des magasins en chaîne par année pour tous les genres de commerce combinés, le tableau 2 donne aussi une information semblable pour chaque classification, par genre de commerce, dans laquelle les chaînes jouent un rôle important.

En 1930 les ventes totales de toutes les épiceries et magasins combinés, (épiceries et viandes combinées) se chiffrent à \$119,715,500, dont 19.78 p.c. provient des magasins en chaîne. La proportion des ventes de ces magasins en chaîne au total des ventes a légèrement augmenté au cours de ces trois années, les plus grandes augmentations se trouvant de 1930 à 1931. Le taux de ventes des chaînes de magasins au total des ventes globales des trois années est comme suit: 1931, 22.23 p.c.; 1932, 22.62 p.c.; 1933, 22.75 p.c.

Dans les magasins de vêtements pour femmes les magasins en chaîne ont fait 11.33 p.c. de toutes les affaires en 1930. En 1933 cette proportion était réduite à 8.07 p.c. et leurs taux pour les années 1931 et 1932 étaient de 9.71 p.c. et 10.23 p.c. respectivement.



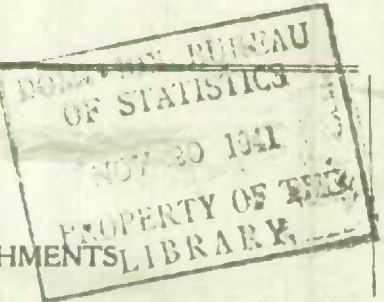
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CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS



RETAIL MERCHANDISE TRADE

IN

ONTARIO

CALENDAR YEAR

1940

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DEPARTMENT OF TRADE AND COMMERCE
DOMINION BUREAU OF STATISTICS
INTERNAL TRADE BRANCH
OTTAWA, CANADA

Dominion Statistician:	R. H. Coats, LL.D., F.R.S.C., F.S.S. (Hon.)
Chief, Internal Trade Branch:	Herbert Marshall, B.A., F.S.S.
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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

Retail Trade in Ontario, 1940

Retail merchandise trade in Ontario was up 13 per cent in 1940 over 1939 and was at a higher level than during any other year since 1929 according to the results of the annual survey of retail trade conducted by the Internal Trade Branch of the Bureau of Statistics. Total sales are estimated at \$1,129,821,000 for 1940 and \$1,002,071,000 for 1939, the figure for 1940 exceeding by 3 per cent the volume of business transacted in 1930. Indexes of sales on the base 1930 equals 100 stand at 102.7 for 1940, 91.1 for 1939 and 89.9 for 1938.

All lines of business for which separate figures have been computed reported increased sales, increases for trades handling more durable items exceeding those recorded by food stores, drug stores and country general stores. The furniture and household group came first in point of view of increased business. Stores specializing in furniture, household appliances or both furniture and household appliances gained 23 per cent in dollar business in 1940 over 1939. The increase for stores specializing in radios or musical instruments was even greater at 27 per cent. The War Exchange Conservation Act introduced at the beginning of December, 1940, provided for a 25 per cent excise tax on the manufacturers' price of radios and electrical household appliances. The tax was not to apply on stocks already in dealers' hands. The result was a marked increase in retail purchasing of these commodities in December, customers endeavouring to satisfy their requirements before dealers' stocks were depleted.

Sales for the automotive group of establishments as a whole were up 15 per cent from 1939. Total sales for motor vehicle dealers were estimated at \$155,559,000 for 1940, up 20 per cent from the preceding year. The increase for new motor vehicles alone, as measured in dollar volume, was similar to that for the motor vehicle dealer business as a whole. There were 58,104 new motor vehicles (exclusive of deliveries to the government for war purposes) sold for \$66,599,861 in Ontario last year, up 16 per cent in number and 21 per cent in value compared with the preceding year. Included in the totals for 1940 were 48,777 new passenger cars which sold for \$55,103,911, up 17 per cent in number and 23 per cent in value from 1939. There were also 9,327 new commercial vehicles sold for \$11,495,950 in 1940, up 8 per cent in number and 10 per cent in value compared with corresponding figures for 1939.

Sales of the apparel group as a whole gained 14 per cent. Men's and boys' clothing stores were up 14 per cent; family clothing stores were up 16 per cent, while stores specializing in women's apparel were up 16 per cent. Shoe stores gained 11 per cent.

Grocery and combination stores are estimated to have transacted business to the value of \$164,621,000 in 1940, a gain of 10 per cent over 1939. Country general store sales at \$42,167,000 were up 6 per cent from the preceding year. Percentage increases for other important lines of business were as follows: 15 per cent for department stores, 17 per cent for variety stores, 9 per cent for hardware stores, 6 per cent for coal and wood yards, 8 per cent for drug stores and 24 per cent for jewellery stores.

Chain Stores

There were 237 chain store companies operating in Ontario in 1940. These operated 3,135 stores within the province with sales of \$226,501,400, an amount which formed 20.0 per cent of the total sales of all stores including both chains and independents. In 1939 the ratio of chain sales to total sales was 19.4 per cent; in 1938 it was 18.8 per cent while in 1930, the first year for which figures are available, the ratio was 19.5 per cent.

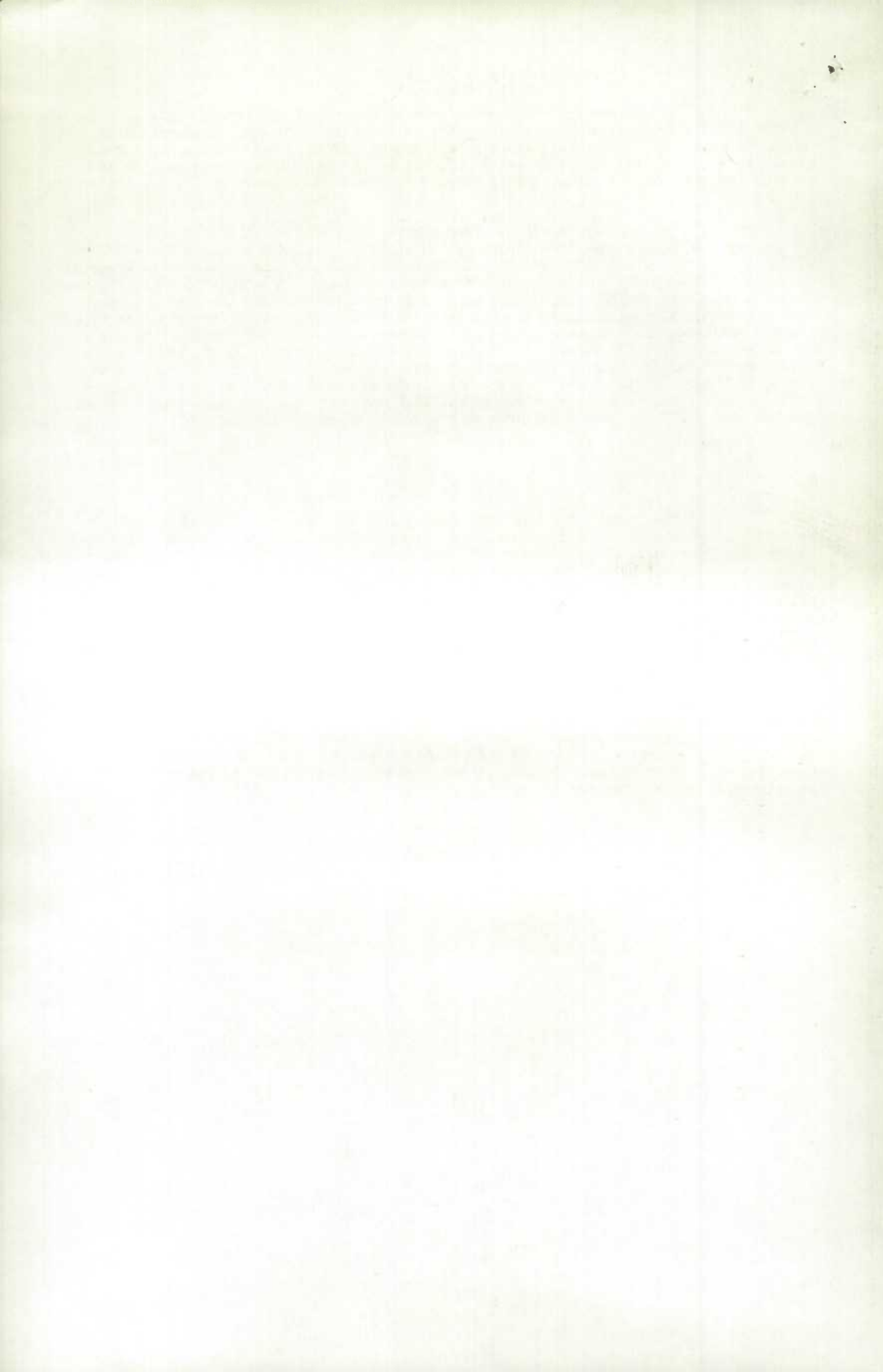
Included in the total chain figures mentioned above were 36 chains in the grocery and combination store field. These 36 chain companies operated 813 stores within the province whose sales of \$81,501,700 formed 49.5 per cent of the total sales of all grocery and combination stores, including chains and independents. The chain figures relate to corporate chains only, groups of four or more stores under the same ownership and management. Voluntary chains are not included in the chain store data given in this report. Ratios of chain to total sales for 1940 for certain lines of business in which the chain store type of distribution is important with figures for 1939 in brackets are as follows: variety stores, 94.2 per cent (94.0 per cent); men's and boys' clothing stores, 16.2 per cent (15.8 per cent); family clothing stores, 20.2 per cent (20.6 per cent); women's apparel or accessories stores, 15.2 per cent (13.8 per cent); shoe stores, 41.6 per cent (38.5 per cent); and drug stores, 23.9 per cent (23.4 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 1940 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 Dominion Bureau of Statistics.



ONTARIO - RETAIL MERCHANDISE TRADE, 1940
Table 1.--Total Net Sales and Sales Indexes, by Kinds of Business

Kind of Business	Stores and Sales, 1930		Estimated Sales (add 000)		Indexes of Retail Sales (1930 = 100)									% of Change, 1940/39
	Number(1) of Stores	Total Net Sales	1939	1940	1930	1933	1934	1935	1936	1937	1938	1939	1940	
Total, All Stores	43,045	\$ 1,099,990,200	\$ 1,002,071	\$ 1,129,821	100.0	67.4	74.9	78.0	83.0	92.9	89.9	91.1	102.7	+ 12.7
Food Group	14,263	255,936,200	220,780	239,637	100.0	70.9	75.2	76.8	79.9	85.5	85.0	86.3	93.6	+ 8.5
Candy and confectionery stores	2,105	15,762,100	12,282	13,658	100.0	65.3	71.2	73.4	75.9	81.9	79.7	77.9	86.7	+ 11.2
Fruit and vegetable stores	876	10,255,000	8,875	9,132	100.0	74.0	78.7	79.3	83.5	86.1	84.3	86.5	89.0	+ 2.9
Grocery and combination stores	7,708	172,935,300	150,398	164,621	100.0	72.9	76.0	76.3	79.8	85.2	84.8	87.0	95.2	+ 9.5
Meat markets (including sea foods)	1,687	33,814,000	26,111	27,364	100.0	60.5	69.3	73.5	74.7	80.0	79.4	77.2	80.9	+ 4.8
Country General Stores	2,662	48,066,000	39,893	42,167	100.0	69.3	77.4	77.7	81.8	87.5	84.8	83.0	87.7	+ 5.7
General Merchandise Group	979	180,383,600	153,411	176,118	100.0	68.9	73.7	74.8	79.1	85.1	82.0	85.0	97.6	+ 14.8
Department stores	61	140,148,400	113,214	129,970	100.0	67.4	71.6	72.0	75.9	80.8	77.7	80.8	92.7	+ 14.8
Dry goods stores	570	13,211,500	9,759	10,920	100.0	63.4	69.3	69.8	72.0	76.8	73.3	73.9	82.7	+ 11.9
General merchandise stores	127	7,392,500	5,231	5,843	100.0	61.2	70.0	69.4	73.8	83.5	72.3	70.8	79.0	+ 11.7
Variety stores	221	19,631,200	25,207	29,385	100.0	85.8	92.8	99.9	108.7	121.7	122.3	128.4	149.7	+ 16.6
Automotive Group	5,481	167,410,500	197,495	226,718	100.0	66.2	82.1	92.0	100.3	126.4	120.2	118.0	135.4	+ 14.8
Motor vehicle dealers	1,018	109,680,100	130,175	155,559	100.0	57.7	80.1	93.5	105.6	136.9	126.0	118.7	141.8	+ 19.5
Accessories, tires and batteries	285	5,453,600	5,313	5,961	100.0	62.9	58.6	58.7	74.2	86.6	90.4	97.4	109.3	+ 12.2
Filling stations(2)	2,754	34,756,300	46,938	48,740	100.0	92.6	98.7	103.3	100.2	121.0	123.9	135.0	140.2	+ 3.8
Garages	1,294	15,931,600	13,831	15,117	100.0	68.9	70.6	71.8	76.2	84.6	86.3	86.8	94.9	+ 9.3
Apparel Group	4,484	93,711,300	79,522	90,824	100.0	68.3	76.0	79.3	84.4	90.5	83.7	84.9	96.9	+ 14.2
Men's and boys' clothing and furnishings (includes custom tailors)	1,662	32,327,700	25,757	29,363	100.0	60.8	70.8	75.1	80.8	87.6	78.2	79.7	90.8	+ 14.0
Family clothing stores	471	14,882,300	15,799	18,279	100.0	80.9	93.8	99.7	107.3	116.0	105.0	106.2	122.8	+ 15.7
Women's apparel and accessories stores	1,569	30,326,200	23,742	27,422	100.0	66.7	71.4	72.9	77.0	80.9	76.6	78.3	90.4	+ 15.5
Shoe stores	782	16,175,100	14,224	15,760	100.0	74.8	78.9	80.8	84.6	90.8	88.5	87.9	97.4	+ 10.8
Building Materials Group	2,030	61,398,100	51,593	59,248	100.0	53.4	63.0	66.3	74.4	84.3	82.6	84.0	96.5	+ 14.8
Hardware stores	1,135	27,752,300	25,013	27,289	100.0	62.8	71.6	74.5	82.0	91.4	90.2	90.1	98.3	+ 9.1
Lumber and building material dealers ..	297	21,950,000	17,771	21,130	100.0	45.2	56.7	60.3	69.8	80.1	76.8	81.0	96.3	+ 18.9
Electrical, heating and plumbing, paint and glass shops	507	7,801,600	5,940	6,706	100.0	54.0	60.7	63.7	69.1	79.8	77.9	76.1	85.0	+ 12.9

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

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