

representing 30.7% of all grocery and combination store sales. Unaffiliated chains accounted for \$3,937.9 million, or 49.9% of the total, and unaffiliated independents had sales of \$1,531.7 million, 19.4% of all grocery and combination store sales. Table 18.5 shows that voluntary groups have lost ground to unaffiliated chains and that both affiliated and non-affiliated independent stores have lost ground to chain stores. From 1967 to 1969, affiliated independent stores increased their share of the market which may have been partly due to an increasing number of independent stores joining voluntary groups. However, in 1972 the market share of both affiliated and non-affiliated independent stores declined; in 1969 there were 7,739 independent affiliated stores but in 1972 their number dropped to 7,077.

Shopping centres. The rise of shopping centres probably constitutes the most important recent development in retailing. A shopping centre is defined as a planned development of outlets with a parking lot which offers free parking to patrons. There must be at least five retail stores (including restaurants but not counting other service outlets); one of the stores must be a grocery and combination store, or a department store, or a chain variety store. The definition excludes shopping facilities without a parking area of adequate dimensions, as well as shopping facilities which do not offer free parking. Hence, most downtown malls and many small "strip" developments are excluded.

The first shopping centre in Canada was built in Vancouver in 1950; by 1956, 64 centres had been built and their aggregate sales of about \$236 million represented 1.6% of total retail trade. By 1972 there were 599 shopping centres in operation, with a total of 12,314 retail and service outlets and sales and receipts totalling \$5,693.2 million. Retail stores alone numbered 9,324 with sales of \$5,466.7 million. This represents 16.1% of total retail sales in Canada. Excluding retail outlets which do not normally operate in shopping centres such as general stores, motor vehicle dealers and fuel dealers, sales in shopping centres accounted for 20.4% of all Canadian retailing.

For some kinds of business, shopping centres are particularly important. In 1972, 50.0% of all department store sales were through shopping centres, 36.2% of all women's clothing store, 29.8% of all shoe store, and 22.7% of all grocery and combination store sales were in outlets situated in shopping centres. Department stores have now replaced grocery and combination stores as the shopping centre's biggest earner: in 1972 sales through department stores in shopping centres totalled \$1,844.2 million; those made through grocery and combination stores \$1,793.0 million (see Table 18.6). From 1970 to 1972, department store sales in Canada increased by \$835.6 million; of this increase 75.5% or \$630.9 million was in shopping centres. At the same time, grocery and combination stores recorded sales increases of \$1,040.9 million; 46.4% of that, or \$483.5 million was in shopping centres.

Shopping centres are, principally, an urban development: the nine largest cities in Canada have two thirds of all shopping centre outlets, sales and receipts. Also, shopping centres attract corporate chain outlets rather than independent retailers: in 1969, independent retailers in shopping centres reached an all-time high share of retail sales of 19.9%. By 1972, that share had decreased to 16.4%. At the same time, while shopping centre sales accounted for 20.4% of all retail sales in Canada, they accounted for 35.4% of all chain and department store sales, and for 29.7% of all chain store sales in the country. Data for retail stores and service outlets in shopping centres of varying size are given in Table 18.7.

Retail sales in shopping centres more than doubled from 1967 to 1972, rising by 114.2%. Similarly, receipts from services rose by 102.5%. During the same period, total retail sales in Canada increased by 40.5%.

New motor vehicle sales. The largest homogeneous group of commodities sold within the confines of retail trade outlets is embodied in the classification "new motor vehicles". It is the only survey of retail trade carried out at the "commodity" level; all others are based on "kind of business". New motor vehicles include passenger cars, trucks and buses. "Passenger cars" include not only private cars, but taxis and other passenger cars used for business and commercial purposes; "commercial vehicles" include all trucks, even if used for private purposes such as camping. All export sales, domestic sales of motorcycles, snowmobiles, and other all-terrain vehicles are excluded. Data published by different sources may vary for several reasons. For example, one source may exclude motor vehicles used by the Canadian Armed Forces, another may classify "demonstrators" as being "used" cars when sold; some sources classify vehicles imported in semi-finished state as "parts", etc. Also, "factory shipments",