

the market, the balance being accounted for by independent stores. In 1977, chain stores accounted for 42.0% of the total market (and independent stores for 58.0%), unchanged from the 1974 distribution and compared to 41.8% in 1976. The largest changes occurred in general stores where chain stores increased their market share from 19.2% in 1974 to 28.0% in 1977 and in men's clothing stores where their market share increased from 24.4% in 1974 to 33.2% in 1977. The largest decline in the market share of chains occurred in household furniture stores, from 19.6% in 1974 to 15.5% in 1977, and in automotive parts and accessories stores, from 17.0% in 1974 to 13.5% in 1977.

Department stores. Department stores (Table 18.4) have shown one of the most consistent growth rates of all categories of retail trade. Their sales were exceeded only by combination stores (groceries and meat) and motor vehicle dealers. In 1977, department store sales reached \$6,941 million, excluding catalogue sales, an increase of 36.9% from 1974. The market share of department stores for 1977 was 11.3%.

The largest increases for departments within such stores in 1977 were recorded by jewellery (58.1%), lingerie and women's sleepwear (52.6%), photographic equipment and supplies (52.2%) and hardware, paints and wallpaper (49.8%). Seven departments recorded sales of over \$300.0 million, the highest of which were furniture and food and kindred products, each with sales of \$367.8 million; followed by major appliances, \$351.9 million; women's and misses' sportswear, \$341.2 million; toiletries, cosmetics and drugs, \$330.8 million; men's clothing, \$325.3 million; and men's furnishings, \$313.6 million. The lowest increase in sales was recorded in millinery (4.6%), which was also the department with the lowest sales, \$16.0 million.

New motor vehicle sales. The largest homogeneous group of commodities sold through retail trade outlets is new motor vehicles. The statistical series based on the sales of this special category of consumer durable is a sensitive indicator of consumer attitudes and expectations regarding the national economy. In 1977, the \$8,546 million in sales of new motor vehicles accounted for 72.7% of all retail sales by motor vehicle dealers (\$11,750 million), 13.9% of total retail sales of \$61,597 million, and 7.0% of total personal spending on consumer goods and services amounting to \$121,955 million.

Statistics Canada obtains monthly new motor vehicle sales figures from both Canadian manufacturers and importers. They supply both unit and dollar sales. Users of the unit data however should be aware that they differ from data available from other sources, such as factory shipments and registrations, owing to variations in definition and treatment of new vehicles in relation to demonstrators, sales to the Canadian forces, semi-finished imports and sales of motors and chassis to coach body-builders.

The new motor vehicles referred to are passenger cars, trucks and buses sold by motor vehicle dealers. Excluded are all export sales and domestic sales of motorcycles, snowmobiles and other all-terrain vehicles. Passenger cars include not only private cars but taxis and car rental fleets and other passenger cars used for business and commercial purposes; commercial vehicles refer solely to trucks and buses. Vehicles manufactured overseas include only those imported (some by Canadian and US manufacturers) in a fully assembled state from countries other than the United States. When assembled on this continent some well-known foreign makes of cars and trucks are treated statistically as being Canadian- and US-made vehicles.

During 1977 record numbers of passenger cars and commercial vehicles were sold in Canada — 1,344,959 units valued at \$8,546 million; this consisted of 991,398 passenger car units valued at \$5,796 million and 353,561 commercial vehicle units valued at \$2,750 million.

Passenger cars made in Canada and the US had their second highest sales year on record with unit sales of 797,752, a small advance over 1976 but short of the record of 835,679 unit sales in 1975. In the latest year the overall increase was mainly due to a 7.4% increase in sales over the year in Ontario where 40.3% of these vehicles were purchased. Total spending on these passenger cars rose 7.5% over the year from \$4,523 million to \$4,864 million in 1977.

The share of the domestic passenger car market supplied by imports in 1977 rose 3.3% from 1976 to 19.5%, with sales of 193,646 units for a value of \$931 million. The