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The Daily

Statistics Canada

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MAJOR RELEASES

OTHER RELEASES

NEW PRODUCTS

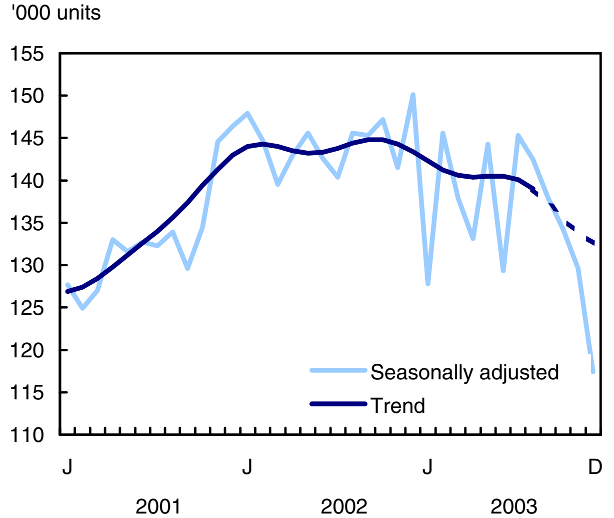
MAJOR RELEASES

New motor vehicle sales

December 2003 and annual 2003

Despite incentives, new motor vehicle sales fell 9.5% in December from November. This was the fifth consecutive monthly decline.

New motor vehicle sales down sharply in December



The last few trend points could be subject to revisions when more data are added. This is indicated by the dashed line.

> ***Note to readers***
>
> *At the end of each calendar year, seasonally adjusted monthly figures are revised to equal the sum of the unadjusted estimates. The complete revision of seasonally adjusted data for the 2003 calendar year will be released in April. Revised seasonally adjusted figures are presented this month for September to November 2003. All annual comparisons in this release use the sum of unadjusted monthly estimates.*
>
> *All data referring to December are adjusted for seasonally. Seasonally adjusted provincial data back to January 1991 are available on CANSIM.*
>
> ***Passenger cars** include those used for personal and commercial purposes, such as taxis or rental cars. **Trucks** include minivans, sport-utility vehicles, light and heavy trucks, vans and buses.*
>
> ***North American-built new motor vehicles** include vehicles manufactured or assembled in Canada, the United States or Mexico. All other new motor vehicles are considered to have been manufactured overseas.*
>
> *For reasons of confidentiality, data for Yukon, the Northwest Territories and Nunavut are included with those for British Columbia.*

In December, 117,373 new motor vehicles were purchased, the lowest monthly level in the past five years. This drop is attributable to weak sales of North American-built passenger cars and of trucks. Trucks include minivans, sport-utility vehicles, light and heavy trucks, vans and buses.

On the basis of preliminary figures from the auto industry, the number of new motor vehicles sold in January is estimated to have increased about 1.5%. Even so, on a year-over-year basis, January's sales were down as a result of five consecutive declines in the later part of 2003.

Annual sales down, but level is still high

In 2003, consumers purchased 1,626,468 new motor vehicles, down 6.2% from 2002, which was a record year (1,733,318 units). The drop followed seven consecutive years of growth. This was the first annual decline since 1995 (-7.4%). However, while the drop seems sizable, the number of new vehicles sold in 2003 was nevertheless the second highest level ever reached.

Despite the availability of incentives throughout 2003 and generally favourable economic conditions, especially in the second half of the year, many consumers did not react to these stimuli. Especially generous incentives, which have become the norm in the industry since the fall of 2001, were largely responsible for the strong growth of sales in 2002. North American automakers have been the most aggressive in offering incentives.

Annual sales down less for trucks than for cars

In 2003, while sales declined from 2002 for all types of vehicles, the drop was greater for passenger cars than for trucks.

Consumers purchased 760,993 new trucks in 2003. This was a 4.7% decrease from 2002, a record year in which sales grew 9.5%. The decrease in truck sales in 2003 was mainly attributable to sales of North American-built trucks, which fell 6.4%, in contrast to sales of overseas-built trucks, which advanced 7.1%.

In 2003, 865,475 new passenger cars were sold, a decrease of 7.4% from 2002, when sales had risen 7.6%. The decline in the number of new passenger cars is attributable to both overseas-built (-8.0%) and North American-built cars (-7.2%).

Sales of new passenger cars have been following a downward trend since the fall of 2002, while truck sales did not experience a similar slowdown until the last months of 2003. Previously, sales of both categories had remained generally stable during 2002, following an upward trend that began in early 2001.

Big Three North American automakers losing market share

The combined market share of the Big Three continued to slide in 2003, for both passenger car and truck sales.

The Big Three's market share of new passenger car sales, after falling below the 50% barrier in 2001, dropped further to 40.8% in 2003. This compares with a 64.6% in 1995.

As for new truck sales, the Big Three, while remaining dominant, have experienced significant erosion. Their market share went from 87.1% in 1995 to 73.3% in 2003.

Big Three market share (units sold[1])

	Passenger cars	Trucks	Total
	%		
1995	64.6	87.1	74.1
2000	51.5	79.8	64.7
2001	45.6	78.3	60.5
2002	44.2	76.8	59.2
2003	40.8	73.3	56.0

1 *Includes both North American and most overseas-built vehicles sold in Canada.*

Sales down in all provinces

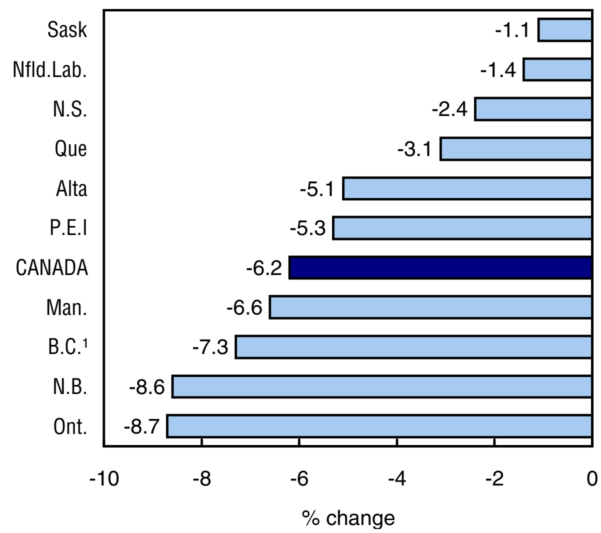
New motor vehicle sales declined in all provinces in 2003, compared with 2002.

Saskatchewan (-1.1%), Newfoundland and Labrador (-1.4%) and Nova Scotia (-2.4%) posted the smallest annual decreases. The sales declines in these provinces were entirely attributable to cars, since their truck sales registered gains — the only ones in Canada.

Quebec (-3.1%), Alberta (-5.1%) and Prince Edward Island (-5.3%) were the only other provinces to register sales declines that did not fall below the national average (-6.2%).

The other provinces posted larger declines, particularly Ontario which posted the strongest decrease.

Sales of new motor vehicles decline in all provinces in 2003 compared with 2002



1 *Includes the Yukon, Northwest Territories and Nunavut*

Available on CANSIM: tables 079-0001 and 079-0002.

Definitions, data sources and methods: survey number 2402.

The December 2003 issue of *New Motor Vehicle Sales* (63-007-XIB, $14/$133) will be available soon. See *How to order products*.

The January 2004 data on new motor vehicle sales will be released on March 15, 2004.

For general information or to order data, contact Client Services (1-877-421-3067; 613-951-3549; *retailinfo@statcan.ca*). To enquire about the concepts, methods or data quality of this release, contact Clérance Kimanyi (613-951-6363), Distributive Trades Division.

□

New motor vehicle sales

	December 2002	November 2003[r]	December 2003[p]	December 2002 to December 2003	November to December 2003
	seasonally adjusted				
	number of vehicles			% change	
New motor vehicles	**150,122**	**129,628**	**117,373**	**-21.8**	**-9.5**
Passenger cars	81,225	69,175	63,689	-21.6	-7.9
North American[1]	56,842	49,689	42,831	-24.6	-13.8
Overseas	24,383	19,486	20,858	-14.5	7.0
Trucks, vans and buses	68,897	60,453	53,684	-22.1	-11.2
New motor vehicles					
Newfoundland and Labrador	2,654	2,095	2,269	-14.5	8.3
Prince Edward Island	422	377	342	-19.0	-9.3
Nova Scotia	4,274	3,884	3,761	-12.0	-3.2
New Brunswick	3,673	2,889	2,607	-29.0	-9.8
Quebec	37,944	33,673	29,741	-21.6	-11.7
Ontario	59,667	48,946	44,247	-25.8	-9.6
Manitoba	4,238	3,657	3,347	-21.0	-8.5
Saskatchewan	3,714	3,131	3,219	-13.3	2.8
Alberta	17,353	15,744	13,851	-20.2	-12.0
British Columbia[2]	16,183	15,232	13,991	-13.5	-8.1

	December 2002	November 2003[r]	December 2003[p]	December 2002 to December 2003
	unadjusted			
	number of vehicles			% change
New motor vehicles	**143,312**	**115,126**	**112,870**	**-21.2**
Passenger cars	70,478	60,556	55,707	-21.0
North American[1]	52,048	44,653	39,213	-24.7
Overseas	18,430	15,903	16,494	-10.5
Trucks, vans and buses	72,834	54,570	57,163	-21.5
New motor vehicles				
Newfoundland and Labrador	1,765	1,480	1,555	-11.9
Prince Edward Island	384	300	295	-23.2
Nova Scotia	3,817	3,127	3,312	-13.2
New Brunswick	3,283	2,378	2,298	-30.0
Quebec	31,452	26,567	24,640	-21.7
Ontario	59,743	45,155	44,856	-24.9
Manitoba	4,311	3,295	3,303	-23.4
Saskatchewan	3,995	2,823	3,534	-11.5
Alberta	18,238	15,612	14,835	-18.7
British Columbia[2]	16,324	14,389	14,242	-12.8

r *Revised*
p *Preliminary figures.*
1 *Manufactured or assembled in Canada, the United States or Mexico.*
2 *Includes Yukon, the Northwest Territories and Nunavut.*

Sales of new motor vehicles
2003

	Total	Passenger cars	Trucks	Total	Passenger cars	Trucks
	Number of vehicles			% change from 2002		
Canada	**1,626,468**	**865,475**	**760 993**	**-6.2**	**-7.4**	**-4.7**
Newfoundland and Labrador	25,428	14,134	11,294	-1.4	-3.5	1.4
Prince Edward Island	4,731	2,653	2,078	-5.3	-6.4	-3.8
Nova Scotia	46,360	26,546	19,814	-2.4	-5.3	1.9
New Brunswick	37,408	19,828	17,580	-8.6	-5.9	-11.5
Quebec	420,185	274,079	146,106	-3.1	-2.4	-4.4
Ontario	626,774	327,030	302,744	-8.7	-11.9	-4.9
Manitoba	46,062	20,941	25,121	-6.6	-6.7	-6.5
Saskatchewan	41,145	16,047	25,098	-1.1	-4.9	1.6
Alberta	194,451	72,994	121,457	-5.1	-8.6	-2.8
British Columbia[1]	180,924	91,223	89,701	-7.3	-5.7	-8.9

[1] *Includes Yukon, the Northwest Territories and Nunavut.*

■

OTHER RELEASES

Non-residential building construction price index

Fourth quarter 2003

The composite price index (1997=100) for non-residential building construction in the fourth quarter was 119.8, up 0.5% from the third quarter and 2.9% from the fourth quarter of 2002. The year-to-year percentage change was the lowest measured since an increase of 2.7% in the first quarter of 2003.

Halifax's index rose 0.9% from the third quarter, followed by Toronto (+0.8%), Vancouver (+0.7%), Edmonton (+0.5%), Ottawa (+0.4%), Calgary (+0.2%) and Montréal (+0.1%).

Toronto had the highest change (+3.6%) from the fourth quarter of 2002, followed by Ottawa (+3.1%), Halifax (+2.9%), Calgary and Edmonton (both +2.7%), Montréal (+2.2%) and Vancouver (+2.0%).

Non-residential building construction price indexes
(1997=100)

	Fourth quarter 2003	Fourth quarter 2002 to fourth quarter 2003	Third quarter to fourth quarter 2003
		% change	
Composite	**119.8**	**2.9**	**0.5**
Halifax	111.2	2.9	0.9
Montréal	117.4	2.2	0.1
Ottawa	121.8	3.1	0.4
Toronto	125.2	3.6	0.8
Calgary	119.9	2.7	0.2
Edmonton	118.3	2.7	0.5
Vancouver	109.7	2.0	0.7

Note: Non-residential building construction price indexes provide an indication of changes in construction costs in seven major urban areas (Halifax, Montréal, Ottawa, Toronto, Calgary, Edmonton and Vancouver). Three construction categories — industrial, commercial and institutional buildings — are represented by selected models (a light factory building, an office building, a warehouse, a shopping centre and a school).

Besides the major urban areas and composite indexes, a further breakdown of the changes in costs is available by trade group — structural, architectural, mechanical and electrical — within the building types. These price indexes are derived from surveys of general and special trade group contractors. They report data on various categories of costs (material, labour, equipment, taxes, overhead and profit) relevant to the detailed construction specifications included in the surveys.

Available on CANSIM: tables 327-0039 and 327-0040.

Definitions, data sources and methods: survey numbers, including related surveys, 2317 and 2330.

The fourth quarter 2003 issue of *Capital Expenditure Price Statistics* (62-007-XPB, $26/$85) will be available in April. See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Rebecca McDougall (613 951-9606; fax: 613 951-1539; *infounit@statcan.ca*), Prices Division. ■

Specialized design services

2002

The pick-up in economic activity across Canada in 2002 was welcome news in select corners of the specialized design industry group. Industrial design, landscape architecture and other design all posted double-digit rates of revenue growth, while graphic design and interior design, which together account for four of every five dollars earned by the group, lagged behind.

Operating revenues for the group rose 6.9% to $2.20 billion in 2002, an increase from $2.06 billion in 2001. Industry revenue growth was driven by the smaller firms, often in the form of unincorporated freelance or solo designers. The share of revenue earned by firms of less than $500,000 provided all revenue growth for the industry in 2002.

Firms reacted to hesitant corporate spending in 2002 by opting for the flexibility of contract labour rather than the commitment of salaried staff. From 2001 to 2002, salaries, wages and benefits for the group fell 3.8%, or $25 million dollars. This decline was offset by strong growth in sub-contracted design work and professional fees.

The operating profit margin for the industry group was 12.0% in 2002, up from 9.3% in 2001, but remained lower than the previous five year average.

Firms in graphic design, the largest industry of the group, earned $1.20 billion in 2002, a 4.1% increase from $1.15 billion in 2001. Rising revenues were due in part to increased transactions within the industry in the form of sub-contracted design work. In terms of contribution to gross domestic product, the industry grew only 1.8%.

Operating revenues of the interior design industry rose 6.4% to $561 million in 2002. Despite a boom in household spending on home renovations in 2002, the industry's share of revenues from households slipped to 30% from an average of 35% over the previous four years.

Operating revenues of industrial design firms recovered, rising 12.9% to $163 million in 2002. Operating profits improved dramatically, rising from 5.1% to 18.1%, as the industry kept tight reins on costs and shook off some large losses of the previous year.

Landscape architecture firms benefited from strong growth in housing starts, posting revenue growth of 13.3% to $161 million. Growth was particularly strong in Quebec (+28%) and Ontario (+18%).

Provincially, the design industry was noticeably concentrated in Ontario, which accounted for 42% of GDP in 2002 and 55% of revenues for the group. This ranged from a high of 59% for graphic design to a low of 44% for industrial design.

Available on CANSIM: table 360-0002.

Definitions, data sources and methods: survey number 4719.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Suvi Kanagarajah (613-951-5251; fax 613-951-6696; *suvi.kanagarajah@statcan.ca*), Service Industries Division. ■

Federal spending on science and technology

2001/02

In 2001/02, the federal government spent nearly $8.2 billion on science and technology. Of this amount, $7.5 billion was distributed regionally.

Of the $7.5 billion, 22% was allocated to Ontario and 19% to Quebec. This excludes funding for science and technology performed by the federal government in its own departments and agencies within the National Capital Region.

The federal government awarded $814 million in research and development grants and contracts in the natural sciences to Canadian industry. About 52% of the total was allocated to industries in Ontario, and 31% to those in Quebec.

Definitions, data sources and methods: survey number 4212.

The service bulletin *Science Statistics: Distribution of Federal Expenditures on Science and Technology by Province and Territories*, 2001/02, Vol. 28, no. 3 (88-001-XIE, $7/$64) is now available. See *How to order products*. Also available is a working paper, *Provincial Distribution of Federal Expenditures and Personnel on Science and Technology*, 1995/96 to 2001/02 (88F0006XIE2004005, free), which elaborates on material in the bulletin.

For more information, or to enquire about the methods, concepts or data quality of this release, contact Lloyd Lizotte, (613-951-2188; *lloyd.lizotte@statscan.ca*) or Antoine Rose (613-951-9919; *antoine.rose@statcan.ca*), Science, Innovation and Electronic Information Division. ■

Canadian Tobacco Use Monitoring Survey

February to June 2003

The Canadian tobacco Use Monitoring survey, conducted since 1999 by Statistics Canada on behalf of Health Canada, provides timely, reliable and continuous data on tobacco use and related issues. Its objective is to track changes in smoking status and amount smoked, especially among young people aged 15 to 24, who are most at risk for taking up smoking.

Definitions, data sources and methods: survey number 4440.

Data from February to June 2003, collected from about 10,500 respondents, are now available in a public-use microdata file (82M0020XCB, $2,140). See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (1-800-461-950; 613-951-3321; fax 613-951-4527; *ssd@statcan.ca*), Special Surveys Division.

For information about the survey results, contact Jirina Vlk (613-957-2988; *jirina_vlk@hc-sc.gc.ca*), Health Canada, or visit the Tobacco Control Programme website (*www.gosmokefree.ca/ctums*). ■

Dairy statistics

December 2003 (preliminary)

Dairy farmers sold 644 000 kilolitres of milk and cream to dairies in December 2003, up 2.3% from December 2002.

Available on CANSIM: tables 003-0007 to 003-0012, 003-0029, 003-0033 and 003-0034.

Definitions, data sources and methods: survey numbers, including related surveys, 3430, 3431 and 3432.

The fourth quarter 2003 issue of *The Dairy Review* (23-001-XIB, $29/$96) will be available soon. See *How to order products*.

For more information, contact Anna Michalowska (1-800-465-1991; 613-951-2442; fax: 613-951-3868), Agriculture Division. ■

NEW PRODUCTS

Canadian Tobacco Use Monitoring Survey Microdata File
Catalogue number 82M0020XCB ($2,140).

Science Statistics: Distribution of Federal Expenditures on Science and Technology by Province and Territories, 2001/02, Vol. 28, no. 3
Catalogue number 88-001-XIE ($7/$64).

Science, Innovation and Electronic Information Division Working Papers: Provincial Distribution of Federal Expenditures and Personnel on Science and Technology, 1995/96 to 2001/02, no. 5
Catalogue number 88F0006XIE2004005
(free).

All prices are in Canadian dollars and exclude sales tax. Additional shipping charges apply for delivery outside Canada.

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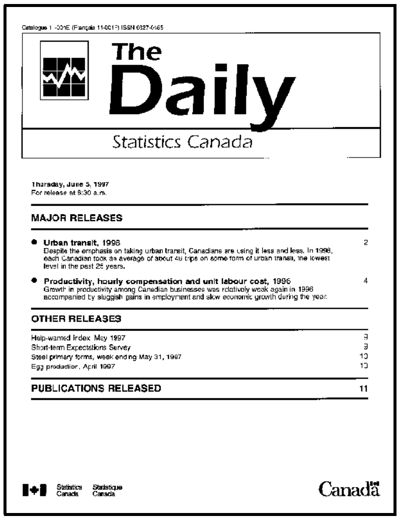
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Thursday, June 5, 1997
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MAJOR RELEASES

- **Urban transit, 1996** 2
  Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1996, each Canadian took an average of about 46 trips on some form of urban transit, the lowest level in the past 25 years.
- **Productivity, hourly compensation and unit labour cost, 1996** 4
  Growth in productivity among Canadian businesses was relatively weak again in 1996 accompanied by sluggish gains in employment and slow economic growth during the year.

OTHER RELEASES

Help-wanted Index, May 1997	9
Short-term Expectations Survey	9
Steel primary forms, week ending May 31, 1997	10
Egg production, April 1997	10

PUBLICATIONS RELEASED 11

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