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Releases

Leading indicators, July 2006

2

The composite index rose by 0.2% in July, after an upward revised 0.3% increase in June. The components related to consumer spending continued to lead growth, while the housing and stock markets rebounded from their spring slump after leading growth at the start of the year.

Study: Wives as primary breadwinners, 2003

4

Study: Time lost due to work stoppages, 2005

4

Refined petroleum products, June 2006

5

New products

6



Releases

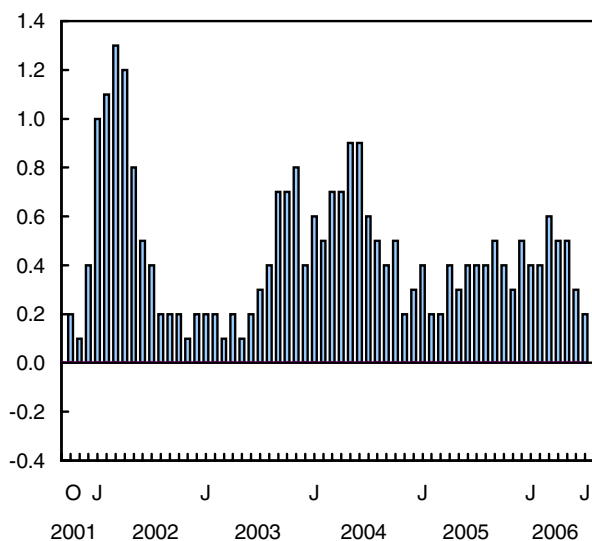
Leading indicators

July 2006

The composite index rose by 0.2% in July, after an upward revised 0.3% increase in June. The components related to consumer spending continued to lead growth, while the housing and stock markets rebounded from their spring slump after leading growth at the start of the year. Partly offsetting these gains was a slowdown in the United States, which aggravated the drop in orders for manufactured goods in Canada.

Composite leading indicator

Smoothed % change



The largest increases among the 10 components of the composite index were in sales of furniture and

appliances (+1.0%) and other durable goods (+0.9%). Higher housing starts helped buttress the housing index. Starts in the first half of the year were running ahead of last year's pace, in marked contrast to the slowdown in the United States.

The stock market rallied over the summer. Increased demand for business services also helped boost the services employment component.

The leading indicator for the United States fell 0.2%. This followed a 0.1% drop the month before, and suggests a continuation of the economy's slow growth that surfaced in the second quarter. A retreat in the housing sector outweighed a pickup in industrial demand and exports.

Lower shipments to the United States continued to hamper manufacturing activity in Canada. New orders were particularly weak, down 0.9%, their largest drop since early 2003. The ratio of shipments to inventories was unchanged, thanks to firms moving quickly to trim output in line with the drop in shipments.

Available on CANSIM: table 377-0003.

Definitions, data sources and methods: survey number 1601.

A more detailed analysis of the components is available online. For more information on the economy, consult the August 2006 issue of *Canadian Economic Observer*, Vol. 19, no. 8 (11-010-XIB, free), now available from the *Publications* module of our website. A printed version (11-010-XPB, \$25/\$243) is also available. See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Francine Roy (613-951-3627) or Philip Cross (613-951-9162; ceo@statcan.ca), Current Economic Analysis Group. □

Leading indicators

	February 2006	March 2006	April 2006	May 2006	June 2006	July 2006	Last month of data available % change
Composite leading indicator (1992=100)	211.9	213.2	214.2	215.3	216.0	216.5	0.2
Housing index (1992=100) ¹	146.7	150.1	149.1	148.8	146.8	144.9	-1.3
Business and personal services employment ('000)	2,684	2,687	2,690	2,702	2,705	2,715	0.4
S&P/TSX stock price index (1975=1,000)	11,223	11,568	11,844	11,939	11,872	11,901	0.2
Money supply, M1 (\$ millions, 1992) ²	142,883	144,758	146,150	147,327	148,998	150,019	0.7
US Conference Board leading indicator (1992=100) ³	126.5	126.9	127.3	127.4	127.3	127.1	-0.2
Manufacturing							
Average workweek (hours)	38.1	38.0	37.9	37.9	37.9	38.0	0.3
New orders, durables (\$ millions, 1992) ⁴	26,906	26,908	27,055	27,380	27,328	27,071	-0.9
Shipments/inventories of finished goods ⁴	1.86	1.87	1.87	1.86	1.86	1.86	0.00 ⁵
Retail trade							
Furniture and appliance sales (\$ millions, 1992) ⁴	2,346	2,391	2,428	2,460	2,496	2,522	1.0
Other durable goods sales (\$ millions, 1992) ⁴	8,058	8,073	8,181	8,281	8,360	8,436	0.9
Unsmoothed composite leading indicator	214.9	215.5	215.2	217.2	217.2	217.7	0.2

1. Composite index of housing starts (units) and house sales (multiple listing service).
2. Deflated by the Consumer Price Index for all items.
3. The figures in this row reflect data published in the month indicated, but the figures themselves refer to data for the month immediately preceding.
4. The figures in this row reflect data published in the month indicated, but the figures themselves refer to data for the second preceding month.
5. Difference from previous month.



Study: Wives as primary breadwinners

2003

The dramatic increase in dual-earner couples during the last four decades has been accompanied by a gain just as dramatic in the number of wives who are the primary breadwinners, according to a new study.

In 1967, an estimated 11% of wives earned more than their husbands did. By 2003, this proportion had nearly tripled to 29%.

The study, published today in the August online edition of *Perspectives on Labour and Income*, showed that the wife was the primary breadwinner in nearly 1.4 million of the 4.7 million dual-earner couples in 2003.

However, while most of these primary-earner wives had twice the earnings of their husbands in 2003, they did not match the earning power of husbands who were the primary breadwinner.

On average, wives who were primary breadwinners earned \$41,200 in 2003, well below the level of \$57,800 among their male counterparts. Husbands who were secondary earners had average earnings of \$21,300.

In general, primary-earner wives earned less than primary-earner husbands in each of the occupational groups the study examined. For example, primary-earner wives in managerial and professional occupations earned on average \$68,000 a year, while their male counterparts earned \$83,000.

Their average family income also lagged behind that of families in which the husband was the primary breadwinner. Family incomes in which the wife was the primary breadwinner averaged \$74,000 in 2003, compared with \$86,000 for families in which the husband was the primary earner.

The tax system narrowed some of this gap, resulting in after-tax incomes of \$61,000 for families in which the wife was the breadwinner, as opposed to \$69,000 where the husband brought home the bread.

In addition, on average, primary-earner wives contributed less to family income than primary-earner husbands. Employment earnings of primary-earner wives represented just over half of their family's income, while the earnings of primary-earner husbands corresponded to two-thirds.

In nearly two-thirds of couples with a primary-earner wife, the wife earned more than twice as much as her husband. Only about one-quarter of primary-earner wives earned less than 50% more than their husband.

However, the ratio of their earnings to their husbands' earnings has remained relatively static on average since 1994.

The study, which used data from the Survey of Labour and Income Dynamics, showed that primary-earner wives differ from other working wives in many ways. For one, they are slightly older. They are also generally more educated than secondary-earner wives and primary earner husbands.

In 2003, 30% had a university degree, compared with 21% of secondary-earner wives and 25% of primary-earner husbands.

With their higher education levels, primary-earner wives have increased their presence in higher paying occupations. In 2003, 40% of primary-earner wives were employed in managerial and professional occupations, compared with only 26% of their secondary-earner counterparts.

Primary-earner wives are also more likely to have a full-time job, work more paid hours per week, and have more years of experience, characteristics that are all associated with higher earnings.

Definitions, data sources and methods: survey number 3889.

The article "Wives as primary breadwinners" is now available in the August 2006 online edition of *Perspectives on Labour and Income*, Vol. 7, no. 8 (75-001-XIE, free) from the *Publications* module of our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Deborah Sussman (613-951-4226; deborah.sussman@statcan.ca), Labour and Household Surveys Analysis Division. ■

Study: Time lost due to work stoppages

2005

Canadian businesses and governments in 2005 lost the highest number of workdays to strikes and lockouts in 15 years, according to a new study of trends in work stoppages.

The study, published in the August online edition of *Perspectives on Labour and Income*, found that labour relations deteriorated at several large employers, resulting in large increases in time lost to work stoppages.

Using data from the Labour Force Survey and information compiled by Human Resources and Social Development Canada, the study examines trends in work stoppages over the past 25 years.

The number of labour disputes that began last year was unchanged from 2004, and only slightly higher than the number in 2002 and 2003. However, the number of

workers involved in the disputes, total workdays lost and time-loss ratios all recorded large increases.

In 2005, an estimated 4.1 million workdays were lost to industrial disputes, nearly 2.5 times the level in 2003 and the highest since 1990 when almost 5.1 million workdays were lost.

An estimated 429,000 workers were involved in 261 work stoppages that began last year, a five-fold jump from only 81,000 in 2003, and the highest level since 1989.

The time-loss ratio (the number of workdays lost per 1,000 employees) enables more meaningful comparisons of annual work-stoppage statistics. In 2005, Canadian firms lost 301 workdays for every 1,000 employees, more than twice the level in 2003 and the highest since 1997.

Even so, the ratio, which controls for the rise in employee numbers, reveals an overall declining trend: from an annual average of 541 workdays lost per 1,000 employees in the 1980s, to 233 in the 1990s, and to 203 in the 2000s.

Some of the increase in workdays lost in the past two years can be attributed to a rise in the number of workers involved (that is, relatively large unions were involved in the recent disputes), and also partly to the long duration of some stoppages. One example would be last year's prolonged work stoppages involving a few large unions.

Between 2003 and 2005, unions initiated about 84% of the 743 work stoppages, and 87% of the 9.1 million resulting lost workdays; the rest were initiated by employers.

Quebec, the province with the highest union density, posted the largest share of strikes and lockouts (336 or 45%), followed by Ontario (230 or 31%).

Nearly 3 in 10 (29%) of the strikes and lockouts occurred in manufacturing, followed by education, health and social services (21%).

Only 2% occurred in information and cultural industries, but these accounted for almost one-quarter of all workdays lost. A long strike involving a few large unions contributed to the large number of workdays lost in this industry.

Also registering relatively large shares of workdays lost were manufacturing (17%); education, health and social services (16%); and public administration (17%).

Wage disputes were the main reason for about one-half of work stoppages between 2003 and 2005. A lack of faith in the bargaining sincerity of the adversary accounted for about one-third.

Three-quarters of the stoppages ended through agreements reached between the adversaries, with or without third-party assistance. Only a handful ended through a forced court order or legislation, or plant closure.

Definitions, data sources and methods: survey number 3701.

The article "Increased work stoppages" is now available in the August 2006 online edition of *Perspectives on Labour and Income*, Vol. 7, no. 8 (75-001-XIE, free) from the *Publications* module of our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Ernest Akyeampong (613-951-4624; ernest.akeyampong@statcan.ca), Labour and Household Surveys Analysis Division. ■

Refined petroleum products

June 2006 (preliminary)

Data on the production, inventories and domestic sales of refined petroleum products are now available for June. Other selected data about these products are also available.

Definitions, data sources and methods: survey number 2150.

For more information or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (613-951-9497 or toll free 1-866-873-8789; energy@statcan.ca), Manufacturing, Construction and Energy Division. ■

New products

Perspectives on Labour and Income, Vol. 7, no. 8
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