

The Emerging Middle Class in Post-Colonial Macao: Structure, Profile, and Mobility

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This article makes use of data from a 2007 social survey of residents of Macao to examine the structure, profile, and mobility situation of the newly emerged middle class there. It finds that although seven out of ten economically active persons in Macao can be classified as belonging to the middle class, the overall distribution is highly skewed toward the lower end of the class spectrum. Subjective class identification and objective class position are positively related. Macao's middle class is the main beneficiary of the city's compressed socioeconomic development, since the members of this class not only have more personal resources and enjoy better living standards, but also have had a more positive experience of social mobility than the working class. Our findings also support the middle class differentiation hypothesis in that there are different segments to the middle class in Macao and a substantial degree of internal differentiation. Among the four subgroups of the middle class, the higher-rank new middle class is

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consistently the most privileged. Education is found to be one of the most important determinants of class advancement.

KEYWORDS: social class; middle class; social mobility; Macao.

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The middle class has been regarded as a socioeconomic cornerstone of developed societies. Governments look upon the creation of a vibrant middle class as a means of softening social inequalities, and the maintenance of that class as a way of preserving the status quo. For an individual, the attainment of middle-class status is a symbol of successful entrance into a certain "way of life," and is an instrument for achieving confidence in the future.¹ While the phenomenal economic growth of Macao since the turn of the new century has led to greater income inequality there, it has also brought greater social mobility and given rise to a middle class. This trend of development is in line with the experiences of other Asian societies—where in all cases the middle classes have emerged during periods of very rapid economic growth.²

Macao was once an important outpost of trade between the West and China, but its recent history has been one of political and economic

¹Nikolai Tilkidjiev, "The Middle Class: The New Convergence Paradigm," *Sociologie Romaneasca* 3, no. 3 (2005): 210-31; and Jennifer Wheary, Thomas M. Shapiro, and Tamara Draut, *By a Thread: The New Experience of America's Middle Class* (New York: Dēmos, 2007), 1.

²See Hsin-Huang Michael Hsiao, "Discovering East Asian Middle Classes: Formation, Differentiation, and Politics," in *Discovery of the Middle Classes in East Asia*, ed. Hsin-Huang Michael Hsiao (Taipei: Institute of Ethnology, Academia Sinica, 1993), 3-4; and Tamio Hattori, Tsuruyo Funatsu, and Takashi Torii, "Introduction: The Emergence of the Asian Middle Classes and Their Characteristics," *The Developing Economies* 41, no. 2 (2003): 129-30. However, it should be noted that most of the previous studies on social stratification in Macao have focused on theoretical and historical discussions. See, for example, Penny Y. Y. Chan, *Aomen fazhan xiankuang* (The development of Macao) (Hong Kong: Wide Angle Press, 1993), 77-89; Wei Meichang, *Aomen zongtan* (Speaking freely on Macao) (Macao: Macao Foundation, 1994), 59-63; Penny Y. Y. Chan, "Xianggang he Aomen de shehui jieji jigou" (The structure of social class in Hong Kong and Macao), in *Aomen zhengzhi shehui yanjiu* (Political and social studies in Macao), ed. Wu Zhiliang and Penny Y. Y. Chan (Macao: Aomen chengren jiaoyu xuehui, 2000), 218-39; and Li Weimin, *Yue Gang Ao shehui guanxi* (Social relations among Guangdong, Hong Kong, and Macao) (Guangzhou: Zhongshan daxue chubanshe, 2001), 66-114.

insignificance.³ In the past decade, however, rapid development on all fronts has transformed Macao into a "global niche city."⁴ The formation of Macao's middle class and the features of that class arise from the global, regional, and local contexts in which such development is taking place. Briefly stated, in the present era of globalization, those who have lost out the most have typically been the excluded nonparticipants.⁵ Macao has successfully ridden the tides of change by developing its tourism and gaming industry and thereby integrating itself into the global system. In the meantime, the Asian financial crisis motivated Asian countries to increase their own savings and foreign exchange reserves, and also to join regional blocs to pursue regional interests. Macao, a small city with no hinterland, has been no exception, and it is acquiring a new and significant role in the development of the South China region. The dual forces of globalization

³Jonathan Porter, "The Transformation of Macau," *Pacific Affairs* 66, no. 1 (Spring 1993): 7-8.

⁴A "global city," a concept that entered urban studies discourse in the early 1980s, is ranked at the top of the global hierarchy of cities. "Global niche cities," which rank below "well-rounded global cities" (such as London and New York), are cities with specialized economic and/or sociopolitical global contributions. See Peter J. Taylor, "Leading World Cities: Empirical Evaluations of Urban Nodes in Multiple Networks," *Urban Studies* 42, no. 9 (August 2005): 1606. In 2007, Macao's gross gaming revenue amounted to \$83,847 million. See Statistics and Census Service, *Yearbook of Statistics 2007* (Macao: Statistics and Census Service, 2008), 252. Unless otherwise specified, the currency used throughout this article is the Macao dollar (the pataca, MOP), which is pegged to the Hong Kong dollar at a fixed rate of HK\$1.00 = MOP1.03, while the Hong Kong dollar is linked to the U.S. dollar at a fixed rate of HK\$7.8 = US\$1.0. Macao surged ahead of Las Vegas in 2006 in total money gambled and is expected to be "on its way to establishing itself as the global leader in a service industry: gambling." See Keith Bradsher, "Bigger Than Las Vegas? That's Macao's Bet," *The New York Times*, August 28, 2007.

⁵See International Monetary Fund, "Globalization: Threat or Opportunity?" April 12, 2000, <http://www.imf.org/external/np/exr/ib/2000/041200to.htm> (accessed September 28, 2008); and Axel Dreher, "Does Globalization Affect Growth? Evidence from a New Index of Globalization," *Applied Economics* 38, no. 10 (2006): 1091-1110. The distinctiveness of the contemporary global economy lies in the convergence of several developments: revolutionary technological advancements and socioeconomic forces that have collapsed time and space and deterritorialized social activities; the doubling of the global labor force as the former Soviet Union, China, India, and other emerging markets have entered the global supply chain; and the lowering of barriers to trade and foreign direct investment across the globe. See Hsin-Huang Michael Hsiao and Po-san Wan, "The Experiences of Cultural Globalizations in Asia-Pacific," *Japanese Journal of Political Science* 8, no. 3 (December 2007): 361; and Angel Ubide, "Don't Blame Globalisation for the Squeezing of the Middle Class" (Brussels: CEPS Policy Brief No. 121, Centre for European Policy Studies, 2007), 2.

and regionalization have accelerated the flows of capital, information, technologies, services, and people in and out of Macao, and are affecting Macao's entire socioeconomic structure, particularly its system of social stratification.

In the local context, the following political, economic, and demographic transformations are specifically relevant to the rise of a middle class in Macao. On the political front, Macao ceased being a Portuguese colony and became a special administrative region of China in 1999. It operates under the principles of "one country, two systems" and "Macao people ruling Macao." It has a high level of autonomy, the central government in Beijing being responsible only for foreign affairs and defense matters relating to Macao. The Chinese government promised to keep its capitalist system and way of life unchanged for fifty years. The transfer of sovereignty has led to changes in a wide spectrum of public policies, such as the liberalization of the gaming industry in 2001 and the implementation of the Individual Visit Scheme in 2003,⁶ which have had a significant impact on social stratification and mobility.

On the economic front, the boom in tourism and gaming has resulted in spectacular economic growth,⁷ as well as changes to economic and occupational structures in Macao, in sectors ranging from manufacturing to the service industry.⁸ The growth and the structural transformation of

⁶The number of casinos in Macao increased from eleven in 2001 to thirty in the second quarter of 2008, with the entry of new international operators such as Las Vegas Sands, Wynn Resorts, and MGM Mirage. See Gaming Inspection and Coordination Bureau, "Number of Casinos," <http://www.dicj.gov.mo/EN/Estat/DadosEstat/2008/estat.htm#n5> (accessed September 28, 2008). The Individual Visit Scheme allows residents of certain mainland provinces and cities to visit Macao as individual travelers; prior to that, mainland visitors could only come in tour groups.

⁷During the period 1999-2007, the number of visitor arrivals grew from 7.4 million to 27 million, and the GDP grew from \$47,287 million to \$153,608 million. See Statistics and Census Service, *Yearbook of Statistics 2001* (Macao: Government Printing Bureau, 2002), 175; Statistics and Census Service, *Yearbook of Statistics 2007*, 237; and Statistics and Census Service, *Estimates of Gross Domestic Product 2007* (Macao: Statistics and Census Service, 2008), 58.

⁸For example, the percentage of the population employed in the tertiary sector of industry grew from 66.0 percent in 1999 to 76.6 percent in 2007. See Statistics and Census Service, "Employed Population by Industry," http://www.dsec.gov.mo/index.asp?src=/english/indicator/e_ie_indicator.html (accessed September 28, 2008).

the economy have generated not only more professional and managerial jobs at the top and the middle levels, but also routine white-collar and administrative jobs at the lower-middle level as well as low-skilled and low-wage service jobs at the bottom, such as those of hotel maid, waitress, and security guard.⁹

Economic growth and income inequality are often positively related. During the period 1999-2007, while the per capita GDP surged from \$110,637 to \$292,165 and the median monthly income increased from \$4,920 to \$7,800, the Gini coefficient also rose from 0.43 to 0.45 (2002/03 data), indicating an increasing polarization of incomes.¹⁰ The empirical evidence on the relationship between economic growth, inequality, and the size of the middle class has been inconclusive. Some scholars have suggested that income distribution may have an entirely different effect at the middle versus both ends of the distribution. As mentioned above, rapid economic development contributes to the rise of a middle class as well as to income inequality, and that inequality provides greater incentives for growth which work best when there is a strong middle class. Thus, a more vibrant middle class can increase economic growth in the long run, especially if there is sufficient income mobility.¹¹

On the demographic front, global cities often experience large-scale immigration and increasing income and occupational polarization.¹² While economic growth creates job opportunities, higher-skilled workers are inclined to migrate to places with more inequality because they provide

⁹During the period 1999-2007, the unemployment rate dropped from 6.3 percent to 2.7 percent. See Statistics and Census Service, *Yearbook of Statistics 2001*, 164; and Statistics and Census Service, *Yearbook of Statistics 2007*, 76.

¹⁰Statistics and Census Service, *Yearbook of Statistics 2001*, 168; Statistics and Census Service, *Household Budget Survey 2002/2003* (Macao: Statistics and Census Service, 2004), 34; Statistics and Census Service, *Estimates of Gross Domestic Product 2007*, 58; and Statistics and Census Service, *Yearbook of Statistics 2007*, 80.

¹¹Mark D. Partridge, "Does Income Distribution Affect U.S. State Economic Growth?" *Journal of Regional Science* 45, no. 2 (May 2005): 366, 388.

¹²Saskia Sassen, *The Global City: New York, London, Tokyo* (Princeton, N.J.: Princeton University Press, 1991); and Michael Samers, "Immigration and the Global City Hypothesis: Towards an Alternative Research Agenda," *International Journal of Urban and Regional Research* 26, no. 2 (June 2002): 389-402.

higher market rewards for their skills.¹³ This is evident in Macao. The population grew rapidly from 429,632 in 1999 to 538,100 in 2007,¹⁴ and the bulk of this increase consists of immigrants.¹⁵ However, as observed by Hamnett,¹⁶ the extent of occupational polarization tends to be related to the skill level of immigrants—cities experiencing high levels of low-skilled immigration are more likely to notice polarization than those with low levels of this type of immigration. The experience in Macao has yet to be explored.

Based on a consideration of the specific socioeconomic context in Macao, in which the changes to the entire system of stratification and mobility are taking place, this article makes use of data from a social survey of residents of Macao conducted in 2007 to benchmark the structure, profile, and mobility situation of the newly emerged middle class there.¹⁷ Specifically, it examines the following objective and subjective features of the Macao middle class: class structure, class identity, demographic

¹³George J. Borjas, Stephen G. Bronars, and Stephen J. Trejo, "Self-Selection and Internal Migration in the United States" (Cambridge, Mass.: Working Paper No. 4002, National Bureau of Economic Research, 1992).

¹⁴Statistics and Census Service, *Yearbook of Statistics 2001*, 45; and Statistics and Census Service, *Yearbook of Statistics 2007*, 39.

¹⁵There are three major types of immigrants: persons authorized to reside in Macao, non-resident workers, and legal immigrants from mainland China. During the period 1999-2007, the year-end balance of the first two types of immigrants surged from 24,290 to 41,955 and from 32,183 to 85,207, respectively. However, the number of legal immigrants from mainland China, most of whom arrived under the category of family reunification and with females greatly outnumbering males, has remained relatively stable at about 3,000 a year. See Statistics and Census Service, *Yearbook of Statistics 2001*, 47; and Statistics and Census Service, *Yearbook of Statistics 2007*, 41.

¹⁶Chris Hamnett, "Urban Inequality: Its Definition, Measurement, Causes and Importance" (Paper presented at the Conference on Social Inequality and Social Mobility in Hong Kong, Hong Kong, March 14, 2008).

¹⁷The project entitled "The Third Phase of the Study on the Quality of Life in Macao 2007" was conducted in April 2007 by the Hong Kong Institute of Asia-Pacific Studies of the Chinese University of Hong Kong and the Centre of Asian Studies of the University of Hong Kong. The target population was Macao residents (those holding a Macao identity card) who were not hospitalized and were at least 18 years of age. With the help of the Statistics and Census Service, a representative sample was drawn by means of a multistage stratified systematic sampling scheme. A door-to-door household visits method was employed. In total, 2,062 successful interviews were obtained, yielding a response rate of 69.3 percent.

characteristics, household characteristics, social characteristics, economic characteristics, and experience of social mobility. The differences among classes will also be explored.

Objective Class Structure and Subjective Identification

Who is a member of the middle class? Changing the yardstick used to define the middle class, e.g., household income or net worth, education, occupation, lifestyle, and so on, would definitely alter who is and who is not included in that group. In this study, we basically followed the five-category class scheme developed by the East Asian Middle Classes (EAMC) project, which is a simplified version of the 11-category class scheme proposed by Goldthorpe,¹⁸ to classify an individual's objective class position. The EAMC scheme includes: (1) the capitalist class and the new middle class, (2) the old middle class, (3) the marginal middle class, (4) the working class, and (5) farm labor.¹⁹ For Macao, the new middle class was divided into two sub-classes: the new middle class (higher-rank) and the new middle class (lower-rank).²⁰

Table 1 compares our sample and the Macao population in terms of class distribution.²¹ On the whole, the capitalist class, old middle class, and

¹⁸John H. Goldthorpe, *Social Mobility and Class Structure in Modern Britain* (Oxford: Clarendon Press, 1987).

¹⁹Hsin-Huang Michael Hsiao and Alvin Y. So, "The Making of the East Asian Middle Classes: The Five Propositions," in *East Asian Middle Classes in Comparative Perspective*, ed. Hsin-Huang Michael Hsiao (Taipei: Institute of Ethnology, Academia Sinica, 1999), 8-9.

²⁰The capitalist class is operationalized as "employers who hire 20 or more employees," the higher-rank new middle class as "higher-grade administrators, corporate managers, and professionals," the lower-rank new middle class as "small business managers and associate professionals," the old middle class as "small proprietors with or without employees," the marginal middle class as "clerks, service workers, shop sales workers, and foremen," the working class as "workers and those in elementary occupations," and farm labor as "agricultural and fishery workers."

²¹It should be noted that only economically active persons were included. In 2007, the labor force participation rate amounted to 69.2 percent and the unemployment rate was 3.1 percent. The respective numbers of recipients of old-age pension, disability pension, and unemployment benefit were 13,811, 1,056, and 4,984. See Statistics and Census Service, *Yearbook of Statistics 2007*, 76, 217.

Table 1
Class Distribution of Survey Sample and Macao Population (%)

	2007 Survey ¹	2006 By-census
Capitalist class	0.0	3.8
Old middle class	1.3	4.6
New middle class (higher-rank)	8.0	7.0
New middle class (lower-rank)	19.7	9.3
Marginal middle class	40.7	40.3
Working class	30.2	35.0
(n)	(1,491)	(290,316)

Note: Five agricultural and fishery workers were grouped into the working class.

Source: 2006 By-Census: Statistics and Census Service, "Global Results of By-Census 2006," http://www.dsec.gov.mo/index.asp?src=/english/html/e_demgraphic.html (accessed September 29, 2008).

working class were slightly under-represented in our survey, while the new middle class (lower-rank) was over-represented. Although more than seven out of ten economically active persons could be classified as belonging to the middle class, the overall class distribution was highly skewed—the absolute majority belonged to the lower end of the class spectrum (marginal middle class 40.7 percent and working class 30.2 percent).

Subjective class identification is fundamental to the development of class consciousness and class formation. In our study, it was measured by a single structured question asking the respondents to place themselves in one of the five class categories: lower, lower-middle, middle, upper-middle, or upper. From the data in table 2, it can be observed that:

1. Middle-class identity was not limited to the middle-class respondents. Most of our respondents, irrespective of their objective class position, tended to place themselves in one of the middle-class categories.

2. The distribution of subjective class identification was also skewed to the lower end. Nearly half of the respondents identified with the lower-middle class (30.7 percent) and the lower class (17.1 percent); and a mere

Table 2
Subjective Class Identification by Class Position (%)

	Old middle class	New middle class (higher-rank)	New middle class (lower-rank)	Marginal middle class	Working class	Overall
Lower	5.3	0.8	4.8	10.4	39.1	17.1
Lower-middle	21.1	11.9	21.0	35.7	35.7	30.7
Middle	68.4	69.5	63.4	50.3	23.6	46.7
Upper-middle	5.3	17.8	10.7	3.5	1.6	5.5
Upper	0.0	0.0	0.0	0.2	0.0	0.1
(n)	(19)	(118)	(290)	(599)	(440)	(1,466)
$(\chi^2 = 366.39^{***})$						

*** p < 0.001.

Note: The original survey question was: "If all of the people in Macao were divided into the five social classes of upper, upper-middle, middle, lower-middle, and lower, which one do you think you would belong to?" (如果將澳門所有人分為上層、中上層、中層、中下層和下層，你覺得你自己是屬於哪一個社會階層呢?)

5.6 percent identified with the upper-middle and the upper classes.²²

3. Subjective class identification was inflated, as compared with objective class position. The percentage of people who thought of themselves as belonging to the middle classes (82.9 percent) was significantly higher than that measured by occupation (69.8 percent).

4. Subjective class identification and objective class position were positively related. The self-identified class position of the working class

²² According to a survey conducted in 1995 (n = 648), none of the respondents identified with the upper-upper class (上上層), 3.5 percent identified with the upper-middle class (中上層), 34.9 percent with the middle-middle class (中中層), 35.5 percent with the lower-middle class (中下層), and 20.4 percent with the lower-lower class (下下層), while 5.7 percent failed to give a definite response. See Guo Fan, "Aomen shehui fengceng zhuguan dingwei fenxi" (An analysis of the subjective social stratification in Macao), *Aomen yanjiu* (Macao Studies) 13 (2000): 58-68. Furthermore, another survey conducted in 2005 (n = 1,166) reported that when the respondents were asked to evaluate the level of their family's social status on an 11-point scale, only 11.5 percent chose the low end of 0 to 2. The respective percentages of those who answered 3 to 7 were 12.6 percent, 11.4 percent, 35.8 percent, 13.9 percent, and 8.9 percent. See Macao Development Strategy Research Centre, *Aomen tequ junin suzhi diaocha baogao, 2005* (Survey report on the quality of Macao residents, 2005) (Macao: Macau Development Strategy Research Centre, 2006), 224.

was significantly lower than that of the middle classes. Among the working class, 39.1 percent identified with the lower class and 35.7 percent with the lower-middle class, and the corresponding percentages for the new middle class (higher-rank) were 0.8 percent and 11.9 percent.

5. Internal differentiations among the middle classes were similarly significant. Among them, 87.3 percent of the new middle class (higher-rank) identified with the middle and upper-middle classes, as compared with 73.7 percent of the old middle class, 74.1 percent of the new middle class (lower-rank), and 53.8 percent of the marginal middle class. The self-identified class position of the marginal middle class was obviously lower than that of other middle classes.

6. In terms of subjective class identification, the internal boundaries of each middle-class subgroup tend to be less distinct than that of the working class. While less than 2 percent of the working class would place themselves in the upper-middle and the upper classes, quite a number of the old middle class (5.3 percent), new middle class (lower-rank) (4.8 percent), and marginal middle class (10.4 percent) thought of themselves as belonging to the lower class. It seems that the class awareness of the middle class is still in the process of consolidation.

Socioeconomic Profile of the Middle Class

Demographic and Household Characteristics

Two demographic characteristics of the middle class are looked at in our study: sex and age. As shown in table 3, women were over-represented in the marginal middle class and the new middle class (lower-rank), and under-represented in the old middle class, new middle class (higher-rank), as well as in the most disadvantaged working class. Gender imbalance was most pronounced in the old middle class (85.0 percent men versus 15.0 percent women), whereas gender distribution was most equal in the new middle class (lower-rank) (48.5 percent men versus 51.5 percent women).

In terms of age, the middle class was significantly younger than the working class. In addition, as expected, among the four subgroups of the

middle class, the new middle classes and the marginal middle class were younger than the old middle class. For example, while a mere 4.1 percent of the marginal middle class were 55 and over, the corresponding percentage for the old middle class was 15.0 percent. The variations in age distribution among classes not only reflect the changing economic structure, e.g., the dwindling of manufacturing industry, but also the differential employment requirements, or perhaps discrimination against older workers, in the service sector.

Household characteristics include marital status, household size, and home ownership. In line with the variations in age distribution, the percentage of those in the working class (4.7 percent) who had never married was significantly lower than in other middle classes. No respondent of the old middle class reported "never married." The highest percentages reporting "never married" were found in the new middle class (higher-rank) and the marginal middle class.

With regard to household size, although there is a continuous trend toward smaller households,²³ working-class households were still larger than middle-class households—only 26.0 percent of the working class were in small households consisting of one or two people, in contrast to 40.8 percent of the new middle class (higher-rank) and 34.8 percent of the new middle class (lower-rank). The average size of households in the old middle class and marginal middle class was larger than that of the other two subgroups of the middle class.

The home ownership rate in Macao is exceptionally high, with 72.9 percent of the resident population in 2006 being owner-occupiers of their living quarters.²⁴ In our study, the overall home ownership rate was 81.1 percent. The old middle class had the highest rate (100 percent), and the working class the lowest (77.6 percent). Home ownership has been regarded as a cornerstone of household wealth for the middle

²³In Macao, the average household size decreased from 3.38 persons in 1996 to 3.00 persons in 2006. See Statistics and Census Service, "Global Results of By-Census 2006," 177.

²⁴Statistics and Census Service, "Global Results of By-Census 2006," 185.

Table 3
Demographic and Household Characteristics (%)

	Old middle class	New middle class (higher-rank)	New middle class (lower-rank)	Marginal middle class	Working class	Overall
Sex						
Male	85.0	64.2	48.5	41.7	63.0	51.8
Female	15.0	35.8	51.5	58.3	37.0	48.2
(n)	(20)	(120)	(293)	(607)	(451)	(1,491)
	$(\chi^2 = 64.93^{***})$					
Age						
18-29	0.0	22.9	24.1	35.2	2.2	21.6
30-54	85.0	67.8	67.7	60.7	76.4	67.7
55 and over	15.0	9.3	8.2	4.1	21.4	10.7
(n)	(20)	(118)	(291)	(605)	(449)	(1,483)
	$(\chi^2 = 219.86^{***})$					
Marital status						
Never married	0.0	35.8	27.6	35.1	4.7	24.1
Others	100.0	64.2	72.4	64.9	95.3	75.9
(n)	(20)	(120)	(293)	(606)	(448)	(1,487)
	$(\chi^2 = 150.24^{***})$					
Household size						
1	5.0	23.3	10.6	12.9	7.8	11.6
2	10.0	17.5	24.2	15.5	18.2	18.1
3	35.0	26.7	26.3	28.0	22.0	25.8
4	25.0	25.0	25.3	28.3	33.3	28.9
≥ 5	25.0	7.5	13.7	15.3	18.8	15.6
(n)	(20)	(120)	(293)	(607)	(451)	(1,491)
	$(\chi^2 = 50.48^{***})$					
Home ownership						
No	0.0	18.3	12.3	20.2	22.4	18.9
Yes	100.0	81.7	87.7	79.8	77.6	81.1
(n)	(20)	(120)	(292)	(598)	(446)	(1,476)
	$(\chi^2 = 17.21^{**})$					

** p < 0.01, *** p < 0.001.

class.²⁵ However, the record increases in property prices in recent years also imply that homebuyers are stretching their financial capacity, which will make it more difficult for them to weather financial setbacks.

Social Characteristics

Social characteristics such as migration experience, educational attainment, and perceived availability of social support are often found to be related to social class. Macao is a migrant society. In our study, only 36.9 percent of the respondents were locally born.²⁶ There was a clear difference between the working and the middle classes: an absolute majority of the working class (77.8 percent) were migrants from mainland China, whereas the corresponding proportions of the middle classes ranged from 65.0 percent (old middle class) to 38.3 percent (higher-rank new middle class). Intra-middle class variations were also significant. On the one hand, the old middle class had the highest percentage of immigrants from the mainland (65.0 percent), and the new middle class (higher-rank) and the new middle class (lower-rank) the lowest (38.3 percent and 40.4 percent, respectively). On the other hand, the new middle class (higher-rank) had the highest percentage of immigrants (17.5 percent) from places other than the mainland (see table 4). It is obvious that immigrants from the mainland, whose educational and professional qualifications tend to be lower than those of local residents, generally end up at the bottom of the class hierarchy, while those from other places, mostly Hong Kong, are able to occupy more privileged positions.²⁷

Class differentials in educational attainment have been extensively studied in numerous countries. The empirical evidence suggests that there is a high degree of temporal stability in the association between class

²⁵Monica Lesmerises, *The Middle Class at Risk* (New York: The Century Foundation Press, 2007), 16.

²⁶In 2006, 42.5 percent of the resident population were born in Macao, while 47.1 percent and 3.7 percent were immigrants from mainland China and Hong Kong, respectively. See Statistics and Census Service, "Global Results of By-Census 2006," 157.

²⁷A similar phenomenon was found in the 1980s and 1990s. See Chan, "Xianggang he Aomen de shehui jieji jigou," 236.

Table 4
Social Characteristics (%)

	Old middle class	New middle class (higher-rank)	New middle class (lower-rank)	Marginal middle class	Working class	Overall
Place of birth						
Macao	30.0	44.2	50.7	43.7	17.1	36.9
China mainland	65.0	38.3	40.4	50.2	77.8	55.9
Others	5.0	17.5	8.9	6.1	5.1	7.3
(n)	(20)	(120)	(292)	(606)	(451)	(1,498)
$(\chi^2 = 157.20^{***})$						
Educational attainment						
Primary	30.0	0.0	10.6	11.7	48.3	21.9
Secondary	60.0	17.5	52.9	70.0	49.9	56.2
Tertiary	10.0	82.5	36.5	18.3	1.8	21.9
(n)	(20)	(120)	(293)	(607)	(451)	(1,491)
$(\chi^2 = 591.26^{***})$						
Availability of financial support						
No	57.9	43.4	52.9	58.0	77.1	61.7
Yes	42.1	56.6	47.1	42.0	22.9	38.3
(n)	(19)	(99)	(257)	(555)	(402)	(1,332)
$(\chi^2 = 66.09^{***})$						
Availability of emotional support						
No	37.5	23.8	35.3	34.2	53.9	39.2
Yes	62.5	76.2	64.7	65.8	46.1	60.8
(n)	(16)	(105)	(258)	(553)	(371)	(1,303)
$(\chi^2 = 50.48^{***})$						

*** $p < 0.001$.

origin and educational attainment.²⁸ Moreover, educational attainment is one of the most influential determinants of an individual's life chances in terms of employment, income, health status, housing, and many other

²⁸Robert Erikson, John H. Goldthorpe, Michelle Jackson, Meir Yaish, and D. R. Cox, "On Class Differentials in Educational Attainment," *PNAS* 102, no. 27 (2005): 9730.

amenities.²⁹ The data in table 4 show clear inter-class and intra-middle class variations in educational attainment. The working class had the lowest level of educational attainment, while the new middle class (higher-rank) had the highest. In between were the marginal middle class, old middle class, and new middle class (lower-rank). Given the substantial improvement in the educational attainment of the Macao population over the past decade,³⁰ the working class and the old middle class are undoubtedly losing their competitiveness in the labor market.

Social support plays a critical role in helping people get through stressful times by providing a sense of belonging, self-worth, and security. Our respondents were asked whether it was hard or easy to find help in times of need. The data in table 4 indicate that the perceived availability of emotional support was, on the whole, nearly double that of financial support. The gap was particularly salient in both the working class (77.1 percent versus 53.9 percent) and marginal middle class (58.0 percent versus 34.2 percent). By contrast, only a minority of the new middle class (higher-rank) found it hard to garner either financial or emotional support in times of need (43.4 percent and 23.8 percent). The levels of social support for the old middle class and the new middle class (lower-rank) were relatively similar.

Economic Characteristics

In capitalist societies, social classes always differ in important economic characteristics, such as work situation and financial situation. Macao is no exception. There were significant differences among the classes with regard to work situation. At one extreme, the working class definitely had lower incomes and less favorable working conditions than the middle classes. The same was true for the marginal middle class when

²⁹Henry Levin, Clive Belfield, Peter Muennig, and Cecilia Rouse, "The Costs and Benefits of an Excellent Education for All of America's Children" (Report prepared under grant support from Lilo and Gerry Leeds to Teachers College, Columbia University, 2007), 2.

³⁰The proportion of the resident population who had attained a tertiary education doubled from 5.5 percent in 1996 to 11.2 percent in 2006. See Statistics and Census Service, "Global Results of By-Census 2006," 168.

the working class was excluded from the comparison. At the other extreme, the new middle class (higher-rank) not only had the highest incomes, but also worked fewer hours and in general had retirement benefits. For example, while 64.3 percent of the new middle class (higher-rank) earned \$15,000 or more a month, 48.3 percent worked less than 45 hours a week, and 63.8 percent had retirement benefits; the corresponding figures for the working class were 0.7 percent, 25.4 percent, and 38.3 percent. Among the four subgroups of the middle class, the work situation of the new middle class (lower-rank) came second to that of the new middle class (higher-rank) in terms of monthly income, but varied from that of the old middle class and the marginal middle class in terms of weekly work hours and retirement benefits (see table 5).

Class differentials in household financial situation closely resembled those in personal work situation. In general terms, the new middle class (higher-rank) and the old middle class were the most privileged classes, while the working class was the most deprived, followed by the marginal middle class. In between, but closer to the privileged classes, was the new middle class (lower-rank). Specifically, financial assets are a crucial component of middle-class stability. They are particularly important in giving current generations a safety net and future generations a head start.³¹ The monetary return from assets also serves as a self-reinforcing mechanism leading to greater class differences.³² In our study, we asked our respondents whether they saved at least \$1,000 a month. As has been found in other Chinese societies, the savings rate of Macao people was rather high. Yet the middle classes were still significantly different from the working class in that 64.0 percent of the working class could save \$1,000 or more a month, while the corresponding percentage for the middle classes ranged from 78.7 percent (marginal middle class) to 93.2 percent (higher-rank new middle class).

³¹Jennifer Wheary, *Measuring the Middle: Assessing What It Takes to Be Middle Class* (New York: Dēmos, 2005), 12.

³²Frederic L. Pryor, "The Anatomy of Increasing Inequality of U.S. Family Incomes," *Journal of Socio-Economics* 36, no. 4 (2007): 595-618; and Ubide, "Don't Blame Globalisation for the Squeezing of the Middle Class," 2.

Table 5
Economic Characteristics

	Old middle class	New middle class (higher-rank)	New middle class (lower-rank)	Marginal middle class	Working class	Overall
Monthly income (%)						
≤ \$6000	21.4	2.6	12.1	27.3	58.0	31.7
\$6,001-\$14,999	42.9	33.0	42.2	57.7	41.3	47.6
≥ \$15000	35.7	64.3	45.7	15.0	0.7	20.7
(n)	(14)	(115)	(282)	(594)	(445)	(1,450)
$(\chi^2 = 477.90^{***})$						
Weekly work hours (%)						
≤ 44	45.0	48.3	36.8	33.3	25.4	33.0
45-59	35.0	33.3	46.5	56.7	50.8	50.7
≥ 60	20.0	18.3	16.7	10.0	23.8	16.3
(n)	(20)	(120)	(288)	(598)	(441)	(1,467)
$(\chi^2 = 61.93^{***})$						
Retirement benefits (%)						
No	–	36.2	42.8	33.7	61.7	44.3
Yes	–	63.8	57.2	66.3	38.3	55.7
(n)	–	(116)	(271)	(590)	(433)	(1,410)
$(\chi^2 = 82.96^{***})$						
Financial assets: savings (%)¹						
No	16.7	6.8	11.5	21.3	36.0	22.4
Yes	83.3	93.2	88.5	78.7	64.0	77.6
(n)	(18)	(117)	(288)	(591)	(417)	(1,431)
$(\chi^2 = 81.16^{***})$						
Material possessions: private car (%)						
No	45.0	35.6	41.0	61.0	85.4	62.2
Yes	55.0	64.4	59.0	39.0	14.6	37.8
(n)	(20)	(118)	(288)	(598)	(445)	(1,469)
$(\chi^2 = 195.44^{***})$						
Financial sufficiency²						
Mean	3.35	3.69	3.47	3.17	2.75	3.15
(SD)	(0.75)	(0.88)	(0.93)	(0.97)	(0.95)	(0.99)
(n)	(20)	(118)	(292)	(603)	(448)	(1,481)
$(F\text{-ratio} = 38.40^{***})$						

*** $p < 0.001$.

Notes: 1. Save \$1,000 or more a month.

2. Answers: from 1 = very insufficient to 5 = very sufficient.

With the rise of global consumerism, lifestyle in general and material possessions in particular are increasingly important for an individual's identity, social position, and life aspirations.³³ Apart from property, a private car is generally seen as one of the largest purchases a person or family will make. According to our study, class differences were greater between the middle and working classes than among the middle classes (see table 5).

When our respondents were asked to evaluate the financial sufficiency of their families, class differences were also prominent. Their answers were coded on a five-point scale, ranging from 1 (very insufficient) to 5 (very sufficient). The working class was the only group whose mean score (2.75) was below the midpoint of 3. The mean scores for the four subgroups of the middle class were all above the midpoint, but ranged widely from 3.17 for the marginal middle class to 3.69 for the new middle class (higher-rank). It is noteworthy that even the most privileged classes in Macao still rated the financial situation of their families as less than sufficient.

Social Mobility Experience of the Middle Class

Situation of Social Mobility

We measured an individual's class mobility situation by asking the respondents the following two questions: (1) "Do you think that your present class status is higher than, about the same as, or lower than it was five years ago?" and (2) "Do you feel that your class status will be higher, about the same, or lower five years from now than it is at present?" The former measures the respondents' past experience with social mobility, while the latter focuses on their anticipation regarding their future social mobility.

The majority (59.7 percent) of the respondents felt that their class status had not changed much in the past five years, 29.5 percent thought

³³Zygmunt Bauman, *Work, Consumerism and the New Poor* (Buckingham: Open University Press, 1998).

that their status was higher than it had been five years ago, while 10.9 percent felt that their status was lower. In other words, although Macao has engineered enviable economic growth, in the subjective perception of its residents social mobility in the past five years has been only moderate, with the majority of people failing to experience significant social mobility. As for those who felt that they had experienced a significant change in their social class, the proportion of those who felt that their social class was higher than before (29.5 percent) was double that of those who felt that it was lower than before (10.9 percent). Class positions were not significantly related to personal experiences with social mobility in the past five years (see table 6).

As for future social mobility, the majority (59.1 percent) of respondents felt that their class status would not change much in five years' time, but 30.1 percent felt that it would be higher than now, while only 10.8 percent felt that it would be lower. On the whole, the figures show a strong continuity in the view of Macao residents regarding their personal social mobility in the next five years with that of the previous five years; that is, neutral tending toward the positive, with nearly nine out of ten residents (89.2 percent) believing that their class status will be unchanged or rise and only one in ten believing that it will fall.

However, unlike the assessment of social mobility in the previous five years, there was a significant difference between social classes in their assessment of future social mobility. In particular, more of the working class felt that their class status was likely to drop over the next five years compared to other social classes. For example, among the working class, 16.9 percent had a pessimistic view of their personal prospects for social mobility, while the figures for the marginal middle class, the new middle class (lower-rank), and the new middle class (higher-rank) were 8.8 percent, 8.0 percent, and 7.3 percent, respectively. The new middle class (higher-rank) were relatively circumspect in judging their prospects; only 27.3 percent believed that their class status would be higher in five years' time than at present, somewhat lower than the 32.9 percent of the marginal middle class and the 30.3 percent of the new middle class (lower-rank) who felt the same way. The old middle class seemed to be the most positive about their

Table 6
Experience and Anticipation of Social Mobility (%)

	Old middle class	New middle class (higher-rank)	New middle class (lower-rank)	Marginal middle class	Working class	Overall
Class status compared with five years ago						
Lower now than 5 years ago	5.3	6.7	6.9	11.5	14.0	10.9
About the same	47.4	63.0	61.9	58.7	59.1	59.7
Higher now than 5 years ago	47.4	30.3	31.1	29.8	26.9	29.5
(n)	(19)	(119)	(289)	(598)	(435)	(1,460)
			$(\chi^2 = 15.22)$			
Class status compared with five years from now						
Lower in 5 years than now	13.3	7.3	8.0	8.8	16.9	10.8
About the same	46.7	65.5	61.7	58.2	57.0	59.1
Higher in 5 years than now	40.0	27.3	30.3	32.9	26.1	30.1
(n)	(15)	(110)	(261)	(510)	(337)	(1,233)
			$(\chi^2 = 22.41^{**})$			
Opportunities for social mobility						
Insufficient	57.9	37.5	42.3	44.6	50.1	45.3
Average	36.8	42.9	42.7	40.5	32.8	38.8
Sufficient	5.3	19.6	14.9	14.9	17.1	15.8
(n)	(19)	(112)	(281)	(570)	(403)	(1,385)
			$(\chi^2 = 13.91)$			

** $p < 0.01$.

prospects for social mobility, since 40.0 percent of them felt that their class status was likely to rise in five years' time.

In sum, the majority of Macao residents do not expect obvious changes to their class status. The middle class are not particularly optimistic, but the working class seem to be even more lacking in confidence. Perhaps the latter feel that the existing mechanism for social mobility is relatively disadvantageous to them. Thus, they are more likely than the middle class to feel that their class status will fall rather than rise in the future.

Perceived Opportunities for Social Mobility

Perceived opportunities for social mobility were measured by directly asking the respondents whether or not such opportunities for the general masses are sufficient. Macao residents tended to hold a negative view, with 45.3 percent of the respondents feeling that in present-day Macao society opportunities to rise in class status were insufficient, 38.8 percent feeling that they were average, and 15.8 percent that they were sufficient. Although it appears that the working class and the old middle class were more negative than the other classes about the sufficiency of opportunities for social mobility, the differences were not statistically significant (see table 6).

Obstacles to Social Mobility

What did the respondents think were the chief obstacles to social mobility faced by ordinary residents? There have been many empirical studies showing that class origin has a significant influence on educational achievement,³⁴ and that educational achievement plays a key role in individual achievement, income, health, housing, and numerous other aspects of life chances.³⁵ In Macao, nearly half of the respondents also felt that the main obstacle to social mobility was "a somewhat low level of per-

³⁴See note 28 above.

³⁵See note 29 above.

sonal educational attainment." This shows that the meritocratic principle of modern open societies, which emphasizes that rewards (i.e., social mobility) in society are distributed on the basis of effort, training, and ability,³⁶ is still an important value orientation of Macao residents. Nonetheless, it should also be noted that a fair number of residents believed that the obstacles to their advancement were not limited to individual factors but included other factors of a structural or policy nature such as, "society places too much emphasis on social connections and not enough on individual ability," "insufficient government support," "insufficient employment opportunities," and "insufficient educational opportunities" (see table 7).

Different social classes held similar views on whether or not "insufficient government support," "insufficient personal ability," and "insufficient educational opportunities" constituted the chief obstacles to upward social mobility. Differences between the middle class and the working class, and within the middle class, were only seen in the following three areas: (1) the proportions of the new middle class (higher-rank) and the new middle class (lower-rank) who believed that "a somewhat low level of personal educational attainment" was the chief obstacle to upward social advancement, at 50.8 percent and 56.9 percent, respectively, were slightly higher than that of the marginal middle class (48.9 percent), the old middle class (45.0 percent), and the working class (43.2 percent); (2) the proportions of the four middle-class subgroups who believed that the chief obstacle to upward social mobility was that "society places too much emphasis on social connections and not enough on individual ability" (ranging from 34.0 percent to 40.0 percent) were all higher than that of the working class (21.7 percent); and (3) the proportions of the four middle-class subgroups who believed that "insufficient employment opportunities" were the main obstacle to upward social mobility (ranging from 5.0 percent to 18.8 percent), were all lower than that of the working class (27.0 percent).

The above findings seem to suggest that the new middle class places even more emphasis than other social classes do on the determining role

³⁶Alfred A. Hunter, *Class Tells: On Social Inequality in Canada* (Toronto: Butterworths, 1981), 73-74.

Table 7
Chief Obstacles to Social Mobility (%)

	Old middle class	New middle class (higher-rank)	New middle class (lower-rank)	Marginal middle class	Working class	Overall
Personal level of education						
No obstacle	55.0	49.2	43.1	51.1	56.8	51.0
Obstacle	45.0	50.8	56.9	48.9	43.2	49.0
(n)	(20)	(118)	(288)	(589)	(419)	(1,434)
						$(\chi^2 = 13.21^*)$
Too much emphasis on social connections						
No obstacle	60.0	60.2	63.2	66.0	78.3	68.5
Obstacle	40.0	39.8	36.8	34.0	21.7	31.5
(n)	(20)	(118)	(288)	(589)	(419)	(1,434)
						$(\chi^2 = 28.44^{***})$
Insufficient government support						
No obstacle	60.0	72.9	70.5	71.1	67.5	69.9
Obstacle	40.0	27.1	29.5	28.9	32.5	30.1
(n)	(20)	(118)	(288)	(589)	(419)	(1,434)
						$(\chi^2 = 3.02)$
Insufficient personal ability						
No obstacle	85.0	65.3	75.7	73.9	72.1	73.2
Obstacle	15.0	34.7	24.3	26.1	27.9	26.8
(n)	(20)	(118)	(288)	(589)	(419)	(1,434)
						$(\chi^2 = 6.52)$
Insufficient employment opportunities						
No obstacle	95.0	89.8	87.8	81.2	73.0	81.0
Obstacle	5.0	10.2	12.2	18.8	27.0	19.0
(n)	(20)	(118)	(288)	(589)	(419)	(1,434)
						$(\chi^2 = 36.64^{***})$
Insufficient educational opportunities						
No obstacle	90.0	85.6	88.5	84.7	83.8	85.4
Obstacle	10.0	14.4	11.5	15.3	16.2	14.6
(n)	(20)	(118)	(288)	(589)	(419)	(1,434)
						$(\chi^2 = 3.72)$

* $p < 0.05$, *** $p < 0.001$.

of education in social mobility, a phenomenon widely observed in many Asian societies.³⁷ In addition, the middle class as a whole is also more critical than the working class of the non-meritocratic factor of social mobility. Such tendencies are basically consistent with the Western experiences.³⁸

Conclusion and Discussion

In the period following the handover of Macao to China and the outbreak of the Asian financial crisis, public policies and socioeconomic circumstances both within and outside of Macao created an infrastructure of opportunity that elevated local people into the middle class and attracted foreign workers to Macao who joined that class. However, to date, the middle class in Macao, which is evolving in a tremendous flux of "compressed socioeconomic development," should at best be regarded as a class at an early stage of formation, and at worst as a middle or intermediate stratum situated between the bottom and top strata.

Based on a revised EAMC class scheme, our study finds that although more than seven out of ten economically active persons can be classified as belonging to the middle class, the overall distribution is highly skewed toward the lower end of the class spectrum. The majority of people, irrespective of their objective class position, also tend to place themselves in one of the categories of the middle class. Once again, the distribution of subjective class identification is skewed toward the lower end—close to half of the respondents identify with either the lower-middle class or the lower class. As expected, subjective class identification and objective class position are positively related. However, in terms of sub-

³⁷Hsin-Huang Michael Hsiao, ed., *The Changing Faces of the Middle Classes in Asia-Pacific* (Taipei: Center for Asia-Pacific Area Studies, Academia Sinica, 2006).

³⁸Thomas A. DiPrete, "Life Course Risks, Mobility Regimes, and Mobility Consequences: A Comparison of Sweden, Germany, and the United States," *American Journal of Sociology* 108, no. 2 (September 2002): 267-309.

jective class identification, the internal boundaries of each middle-class subgroup tend to be less distinct than that of the working class. It seems that the class awareness of the middle class is still in the process of consolidation.

As suggested by Wheary, Shapiro, and Draut,³⁹ middle-class people need to have: (1) the education necessary to find a good job in a competitive global economy, (2) sufficient incomes to afford a comfortable standard of living, and (3) financial assets sufficient to develop a safety net in case of job loss or serious illness, to secure a comfortable future, and to help their children get a start in life. In addition to these common markers of the middle class, we have included such demographic, household, and social criteria as sex, age, migration experience, and experience of social mobility, to delineate inter-class and intra-middle class differences. On nearly all of the indicators that we adopted, the pattern of the differences between the middle classes and the working class is extremely clear and coherent—middle-class people not only have more personal resources and enjoy better living standards, but also have a more positive experience with social mobility than the working class. Indeed, they are the main beneficiaries of Macao's "compressed socioeconomic development."

Notwithstanding such prominent inter-class disparities, our findings also support the middle class differentiation hypothesis that the middle class has different segments and that internal differentiation is substantial.⁴⁰ Among the four subgroups of the middle class, the new middle class (higher-rank) is consistently the most privileged. Most of its members are younger, locally born, highly educated, have a higher income, a smaller-size household, more assets, and more social support; they are also more positive about their experience with social mobility. Following them are the old middle class, the new middle class (lower-rank), and the marginal middle class. Although the marginal middle class always ranks last among middle-class subgroups, it differs from the working class in nearly every

³⁹ Wheary, Shapiro, and Draut, *By a Thread*, 1.

⁴⁰ Hsin-Huang Michael Hsiao, *Exploration of the Middle Classes in Southeast Asia* (Taipei: Program for Southeast Asian Area Studies, Academia Sinica, 2001), 5.

aspect under study and thus should not be excluded from the middle class.

Our study also finds that education is highly correlated with the formation of the new middle classes in Macao. An individual's key to entry to the new middle classes is his/her educational qualifications. The privileged class is still open to people who manage to earn the right credentials. Members of the new middle classes also widely believe in this value. However, it is noteworthy that the working class had a higher proportion than all of the middle classes of those who felt that a low level of educational attainment was not an obstacle to class advancement for the general population. At the same time, a higher proportion of that class felt that insufficient employment opportunities did form a barrier to upward mobility for the average resident. This more or less reveals a situation in which the Macao working class is starting to question the usefulness of educational qualifications for class advancement, instead pointing to the structural issues of insufficient employment opportunities as being the crux of the problem, even though the unemployment rate was as low as 2.7 percent in 2007. If this turnaround is not reversed quickly, it could well lead to the intensification of feelings of opposition and suspicion between the classes, which would harm social stability and harmony.

All in all, it has been fashionable to claim that conventional class analysis is deficient and in need of revision.⁴¹ Some even assert that the concept of class is ceasing to be useful.⁴² While the foregoing profiling of classes in Macao may not be adequate to argue the point that "class still matters," it clearly demonstrates the existence of a hierarchical ordering of social groups or social classes (albeit an internally heterogeneous one) in terms of subjective perceptions, objective conditions of resources and rewards, and personal experiences of social mobility.

⁴¹David B. Grusky and Jesper B. Sørensen, "Can Class Analysis Be Salvaged?" *American Journal of Sociology* 103, no. 5 (March 1998): 1187.

⁴²R. E. Pahl, "Is the Emperor Naked? Some Questions on the Adequacy of Sociological Theory in Urban and Regional Research," *International Journal of Urban and Regional Research* 13, no. 4 (December 1989): 710.

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