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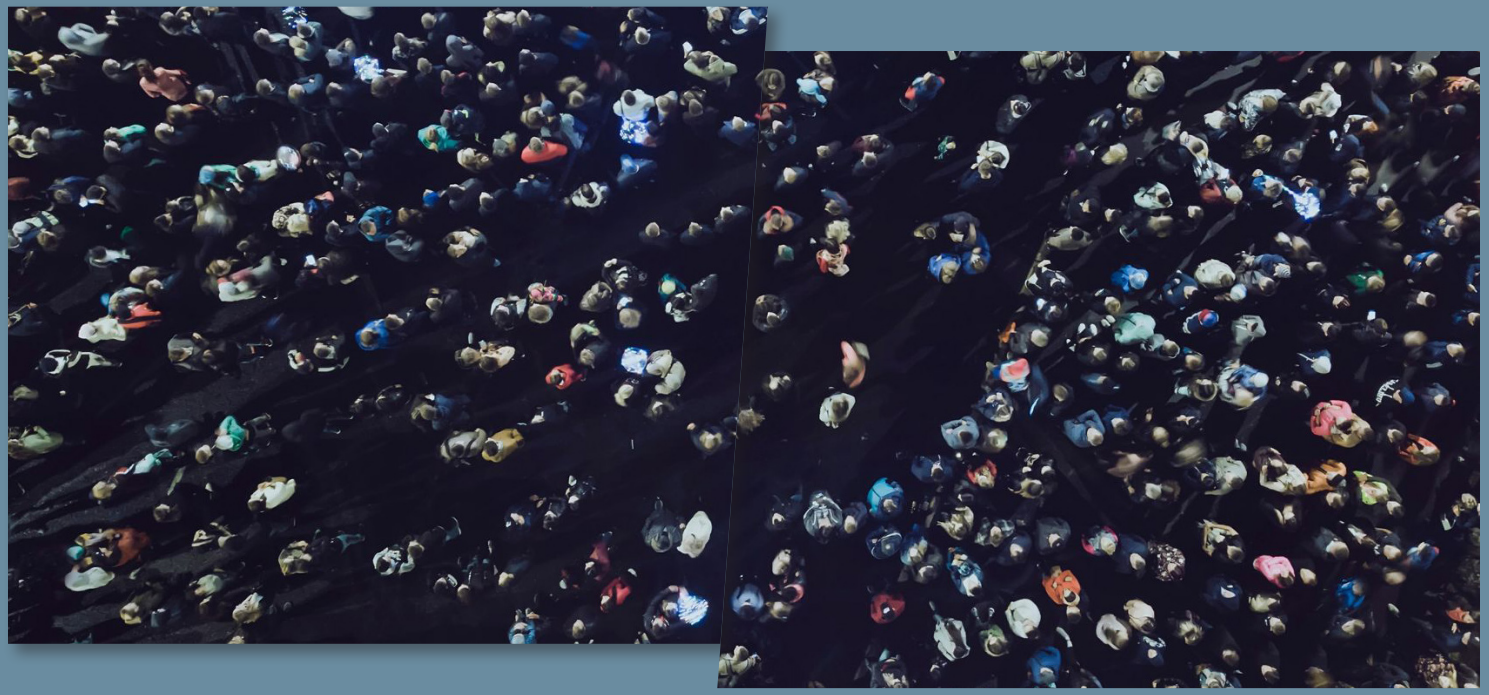

The middle class in Canada and Quebec

A literature review

November 2024 Roberson Edouard with the collaboration of Geoffroy Boucher and Ferdaous Roussafi

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Introduction

This research note, the first in a series of three, presents a review of what we know about the middle classes, particularly in Quebec and Canada. It is based on a scoping review of literature and on the analysis of some secondary data drawn from Statistics Canada's 2019 Survey of Financial Security.

Knowledge reviews

The middle class is often used as an indicator of the economic and social evolution of societies. Existing empirical studies tend to show that larger middle classes are globally associated with "superior economic performance"[1]. According to American economist William Easterly[2], countries with a larger middle class tend to develop faster, especially if they are not very ethnically diverse. A strong middle class symbolizes a significant reduction in social inequalities and, by the same token, contributes to a healthy democracy, economic growth and political stability[3]. For Laurent Wauquiez[4], it is the middle classes who are the driving force of our democracy, through their work, their contribution through taxation and the values they uphold. For sociologist Louis Chauvel[5], however, the middle classes have been associated with an imaginary sense of progress and emancipation ever since the great social achievements[6] of the thirty glorious years period (1945-1975). For sociologist Serge Bosc[7], the term is widely used in the media to refer to the "breakdown of the social elevator" of which this group is said to be a victim, or to the tax pressure or professional devaluation they may suffer. For Louis Chauvel, the middle class, under pressure, now encompass social inequalities, downward social mobility, the loss of purchasing power due to the rising cost of living, the impoverishment of entire cohorts of over-educated young people - in short, a spiral of impoverishment and downgrading with potentially devastating effects[8].

1. Loayza, N., Rigolini, J. and Gonzalo, L. (2012). Do middle classes bring institutional reforms?, Economics Letters, 116 (3), 440-444. ***https://www.sciencedirect.com/science/article/abs/pii/S0165176512001437?via%3Dihub***; Clément, M. and Rougier, E. (2015). Middle classes and emergence in East Asia: measurements and issues. Developing Worlds, 169(1), 31-45. 10.3917/med.169.0031. ***https://shs.cairn.info/revue-mondes-en-developpement-2015-1-page-31?lang=fr***.
2. Easterly, W. (2001). The middle-class consensus and economic development, Journal of Economic Growth, 6 (4), 317-335.
3. Toy, B. (2018). An Exploration of Middle-Class Dynamics in Canadian Cities [PhD dissertation, Department of Geography, McGill University. Montreal].
4. Wauquiez, L. (2011). *The struggle of the middle classes*. Odile Jacob.
5. Chauvel, L. (2006). *Les classes moyennes à la dérive*. Seuil.
6. We're thinking here of access to home ownership, car ownership, access to university, employment rights and social benefits, etc.
7. Serge Bosc (2008). *Sociologie des classes moyennes* (série « Répère »). La Découverte.
8. Chauvel, L. (2016). *La spirale du déclassement. Essay on the society of illusions*. Seuil.

This is why the debate about the middle classes and their importance (theoretical and empirical) is increasingly recurrent in social sciences and in the public arena[9]. Contemporary research has focused on the question of the evolution of the middle classes (decline or expansion) as a subject of economic and political interest[10].

Some studies have sought to rigorously document the characteristics and evolution of the middle classes in Canada or Quebec[11]. The literature has also focused more specifically on the question of identification with the middle class[12]. Some of these studies focus on class identity, the economic weight of each class and their fiscal contribution[13]. Others explore social inequalities based on the characteristics of the intermediary classes[14]. Still others document the factors, including education, family or immigration, that contribute to access to the middle class. Finally, others have looked at intragenerational mobility and the intergenerational transmission of income among middle-class individuals[15].

Despite all this work, the notion continues to pose a number of challenges to our understanding and to the implementation of targeted public policies. The first of these challenges relates to the definition of its subject. What exactly is the middle class?

9. Tillman, R. (2010). *A middle-class society? The case of contemporary Swiss society, Sociologie, 1(2), http://journals.openedition.org/sociologie/427*.
10. Darbon, D. (2012). Middle class(es): a review of the literature. A useful concept for tracking Africa's dynamics. Afrique contemporaine (244), 33-51. *https://shs.cairn.info/revue-afrique-contemporaine1-2012-4-page-33?lang=fr*; Delsaux, A. (2023). *Requiem pour la classe moyenne*. Éditions Noir sur Blanc, Notabilia; Chauvel, L. (2006). *Les classes moyennes à la dérive*. Seuil; Chauvel, L. (2016). *La spirale du déclassement. Essai sur la société des illusions*. Seuil; Damon, J. (2013). *Les classes moyennes*. PUF; Wauquiez, L. (2011). *La lutte des classes moyennes*. Odile Jacob; Gaggi, M. et Narduzzi, E. (2006). *The end of the middle classes*. Liana Lévi; Bouffartigue P., Pochic, S. and Gadéa, C. (2011). *Cadres, classes moyennes : vers l'éclatement ?* Armand Colin; etc.

11. Foster, J. and Wolfson, M. (2010). Polarization and the decline of the middle class: Canada and the U.S., The journal of Economic Inequality, 8(2), 247-73.https://ideas.repec.org/a/kap/jecinq/v8y2010i2p247-273.html; Beach, C. M. (1988). The 'vanishing' middle class?: Evidence and explanations, Queen's Papers in Industrial Relations, Industrial Relations Centre, Queen's University at Kingston; Langlois, S. (2010). Mutations des classes moyennes au Québec entre 1982 et 2008, Les cahiers des dix, (64), 122-143. https://doi.org/10.7202/045790ar; Delorme, F. and St-Cerny, S. (2014). Is the middle class in Quebec really eroding? Contour et évolution, Research Chair in Taxation and Public Finance. *https://cffp.recherche.usherbrooke.ca/wp-content/uploads/2018/12/cr_2014-04_la_classe_moyenne_au_quebec.pdf*.
12. Angus Reid Institute (2023). Canadians and social class. https://angusreid.org/wp-content/uploads/2023/09/2023.09.21_Great_Canadian_Class_Survey_FR.pdf; Langlois, S. (2014). Subjective social mobility in Quebec. Les cahiers des dix, (68), 287-300. *https://doi.org/10.7202/1029296ar*.
13. See Genest-Grégoire, A., Godbout, L. and Guay, J.-H. (2017). All in the middle class! Who thinks they're part of the middle class and how Quebecers perceive their tax contribution, Policy Options *https://policyoptions.irpp.org/magazines/may-2017/tous-dans-la-classe-moyenne/*.
14. See Angus Reid Institute (2023), *op. cit.*
15. Connolly, M., and Haeck, C. (2024). Intergenerational Income Mobility Trends in Canada. Canadian Journal of Economics, 57(1), 5-26.https://doi.org/10.1111/caje.12699; Connolly, M. and P.-Demontigny, C. A. (2021). Income Mobility among Middle-Class Households. Employment and Social Development Canada. [Report prepared for Employment and Social Development Canada]. *https://grch.esg.uqam.ca/wp-content/uploads/sites/82/Final_report_ESDC_2021-03-03.pdf* .

What is the middle class?

What's it all about?

The scientific community struggles to define the middle class. For over a century, sociologists, economists and politicians have endeavoured to figure out what it is, without ever coming up with a standard definition. Is it an economic category determined by the level of resources (income or assets) of individuals and households, or rather a socio-professional status based on level of education and occupation, or a social identity defined by certain cultural tastes, consumption patterns and social aspirations[16]? In any case, the term itself is made up of two relative nouns: the qualifier "middle", which refers to intermediate ranks and positions on various hierarchical scales (income, wealth, qualifications, etc.), and the word "class", which is associated with positions and functions in social relations of production as well as power relations[17].

There seems to be a certain consensus in the literature that the term "middle classes" should be used in the plural. However, according to Julien Damon[18], the reason for using the plural is that this single term covers a wide variety of situations. The "middle classes" therefore do not spontaneously designate delimited social groups, but rather embody an in-between: between the upper classes and the working classes. Laurent Wauquiez even goes so far as to say that "the middle classes are caught between the working classes, who are the subject of all the political attention (minimum social benefits, various forms of assistance), and the wealthy classes, who are taking advantage of globalization to increase their incomes[19]". But how can we define the middle classes if what distinguishes them is, above all, their plurality?

16. Hamilton, D. (2021). The American Middle Class; A brief History, *PA Times Online*. ***https://patimes.org/the-american-middle-class-a-brief-history/***.
17. See Bosc, S. (2008), *op. cit.*
18. Damon, J. (2013). *Les classes moyennes*. PUF.
19. Wauquiez (2011), *op. cit.*

There are three ways to answer this question: based on people's class identity, by using sociological approaches or by taking an economic perspective.

Self-identification: the middle class, first and foremost a group of belonging

There are many definitions of the middle classes. However, none of them is universally accepted. Recent research has established that the middle classes can no longer be defined solely in terms of what a person owns or does; their own perception and self-ranking must also be taken into account. When people are asked to position themselves on the social ladder, do they tend to place themselves among, above or below the middle classes?

We call subjective identification, or self-classification, the fact that people identify with a social class, through a sense of class belonging[20]. Such a feeling derives from people's perception of their own social position, their personal aspirations and their experiences with regard to identity, community of interest and social integration[21].

In OECD countries, most people spontaneously identify with the middle classes, even when they are not objectively part of this group[22]. In the USA in 2015, 89% of the population claimed to be middle class: 10% considered themselves to be lower class and only 1% upper class[23]. Table 1 shows that the thresholds for middle-class entry and exit defined by self-identification vary according to the survey and context. It also shows that self-identification hardly leads to a shared definition of middle-class living conditions.

20. Wenger, J. B. and Zaber, M. A. (2021). Who is Middle Class?, *Perspective*, RAND Corporation, PE-A1141-3, 2021. ***https://www.rand.org/pubs/perspectives/PEA1141-3.html***.
21. Michelat, G. and Michel, S. (1971). Objective social class, subjective social class and electoral behavior. *Revue française de sociologie*, 12(4),483-527. ***www.persee.fr/doc/rfsoc_0035-2969_1971_num_12_4_2013***.
22. i.e. households whose disposable income represents of 75% à 200% of the national median income. See OECD (2019). Under pressure: the middle class is losing ground. OECD Publishing. ***https://doi.org/10.1787/2b47d7a4-fr*** .
23. According to other surveys, including the *Northwestern Mutual survey*, the percentage of Americans who claim to be part of the middle class drops to 70%. See Wenger and Zaber (2021), *op. cit.*

Table 1. Definitions of middle classes based on auto-identification

Criteria	Scales	Annual income intervals	Reference
Family income	Auto-identification	$ 40,000 - 200,000 $	Brian W. Cashell (2008)
Family income	Auto-identification	$55,000 - $166,000	Pew Research Center (2015)
Family income	Auto-identification	$46,000 - $230,000	Richard V. Reeves et al. (2018)
Family income	Auto-identification	$ 75,000 - $400,000	E. Tammy Kim (2019)
Family income	Auto-identification	$32,000 - $94,000	Antoine Genest-Grégoire et al. (2020)

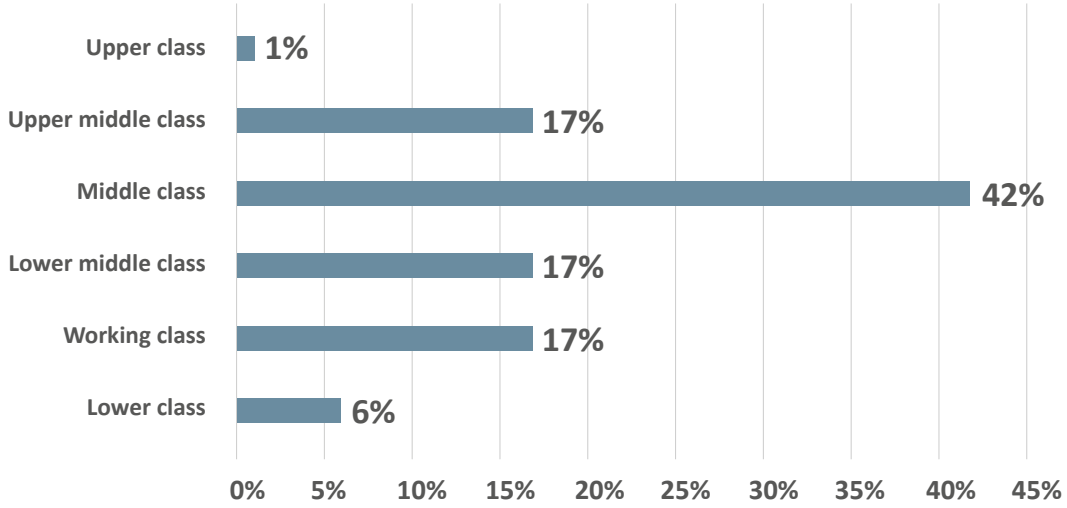
Sources : Richard V. Reeves et al. (2018a). A dozen ways to be middle class; Richard V. Reeves et al. (2018b). Defining the middle class: Cash, credentials, or culture; Antoine Genest-Grégoire et al. (2020). Never too rich to be middle-class[24].

In addition, the results of several polls (Pew, GSS, Gallup, *New York Times*) tend to show an inequality in the inclination of individuals to consider themselves members of the middle class or not. For example, because of the colonial and racist history of the United States, in collective representation, the middle class has been and continues to be mainly made up of White people. As a result, Blacks or Hispanics are much less likely to define themselves as members of the middle class than Whites and that, even if they are in the same income bracketss[25].

24. Genest-Grégoire, A. Guay, J.-H. and Godbout, L. (2020). Never too rich to be middleclass: An assessment of the reference-group theory and implications for redistributive taxation. Dans What Drives Inequality? *Research on Economic Inequality*, 27, 123–137. ***https://ideas.repec.org/h/eme/reinzz/s1049-258520190000027009.html***.
25. Reeves et al. (2018b), *op. cit.*

In Canada, according to the data[26] in Figure 1, in 2023, 42% of the population claims to belong to the middle class, 17% to the working class, and an equivalent proportion to the lower-middle and upper-middle classes. Less than 1% declaredbelonging to the upper class, and 6% to the poor lower class. In Quebec, too, the tax specialist Antoine Genest-Grégoire and his colleagues note a significant gap between objective and subjective social classes, with a significant under-reporting of the wealthy class: "Under subjective classes, the size of the middle class swells to 56% compared with 38% according to statistical data, while the class above represents only 6% of households, compared with 27% according to statistical data[27]."

Figure 1. If you had to choose, how would you describe your current social class, using the following categories? (All respondents, n = 8043)



Source : Angus Reid Institute, Les Canadiens et la classe sociale 2023, p. 5.

26. These data are taken from the Angus Reid Institute's 2023 survey.
27. Genest-Grégoire et al. (2017), *op. cit.*, p. 24.

The data from the literature review do not explain this under-representation of the upper class. Reference group theory suggests that, when comparing themselves with their immediate environment, most individuals tend to identify with the middle class, notably because they underestimate inequalities or are unaware of the true picture of the distribution of economic resources in society. According to Genest-Grégoire et al. this is due more from an excess of humility or from embarrassment at being associated with the so-called "rich" social class than from ambition. Nevertheless, another cognitive bias appears in the data: many seem to prefer the uplifting image of the middle class to the more tarnished image of the underprivileged. Canadians who claimed to belong to a lower class were generally less educated, had lower incomes and were also less likely to own their own home than those who claimed they belonged to a higher class. Those of lower class were less satisfied with their access to health care (45%) and quality education (64%) than the average (57 and 81%, respectively). They were also more pessimistic about their future (61% versus 36%).

The Angus survey data also show that class identity varies according to province of residence. **In Quebec, people tend to see themselves as members of the middle class, even when their incomes are in fact too high to place them in this group**[28]. Nevertheless, they are more likely to identify themselves as belonging to the upper middle class than anywhere else in the country. They are also less inclined to identify themselves as members of the working class. The reverse is truein Saskatchewan, which has the reverse is truein Saskatchewan, which has the lowest proportion of people identifying themselves as upper class (11%) and the highest proportion identifying as working class (26%)[29].

These data are in line with those from a similar survey carried out 10 years earlier, in 2013, which revealed that middle-class membership was on the rise in Quebec: twice as many people surveyed (14.3%) classified themselves in the three lowest levels of the social ladder, compared with the three upper rungs (7.2%). Women were more likely to rank themselves in the five social categories at the lower end of the scale, while there were more men in the upper classes (6 and 7).

28. Genest-Grégoire et al. (2017), *op. cit.*
29. Angus Reid Institute (2023), *op. cit.*

Sociologist Simon Langlois[30] concluded that in Quebec many people claim to belong to the middle classes when asked to situate themselves on the social ladder.

The results of the Angus Reid Institute survey also show a positive relationship between class identity, income and education among people surveyed. Thus, the higher the class identity, the higher the level of education and income. The survey revealed a strong association between home ownership and class identity. Middle-middle class (73%) and upper-middle class (79%) Canadians are more likely to own their own home than lower middle class (56%) or working class (53%) Canadians. In the lower or poor class group, the majority (61%) rent[31].

30. See his blog post *L'appartenance aux classes moyennes s'accentue*. ***https://contact.ulaval.ca/article_blogue/lappartenance-aux-classes-moyennes-saccentue/index.html***.
31. Angus Reid Institute (2023), *op. cit.*

Class identity is also the symbolic expression of a class positioning embodied in consumption patterns, certain cultural tastes and social aspirations[32]. It makes it possible to classify people who have comparable levels of income and education, but different tastes and aspirations. Middle class members distinguish themselves from the upper and lower classes in terms of values, culture, morals, and sense of dignity or honour[33]. They can also be recognized by their individual aspirations to own a home, to pay for university education for their children, to own at least one vehicle per adult, to receive adequate health care or to take an annual vacation abroad. Even if these aspirations change over time, we observe a central trend that withstands the economic climate.

In the collective imagination, members of the middle class are able to buy a house and a car, send their children to university and accumulate retirement savings during their working lives[34]. The middle class also has fewer children, and spends much more on their children's education and health, as well as on their own well-being. According to Abhijit V. Banerjee and Esther Duflo (2008), even in developing countries, middle class people lead much healthier lives than the poor. They go to the doctor more often and spend more per visit. They are also much more likely to have access to running water, latrines and electricity. When it comes to children's education, members of the middle class spend significantly more per child, both in terms of years of schooling and better quality of education..

In general, the middle classes are characterized as much by a culture of comfort, success and appearances as by a culture of well-being, benevolence and open-mindedness[35]. For example, according to sociologist Julien Damon, the French middle classes are made up of people who are not only endowed with economic, educational and cultural capital, but who also aspire to a certain standard of living and to be part of the upper social classes[36].

As we stated earlier, the middle classes are where one finds the greatest aspirations to social advancement and where there are the greatest fears of loss of status.

32. David Hamilton (2021). The American Middle Class; A Brief History, *PA Times Online*. ***https://patimes.org/the-american-middle-class-a-brief-history/***.
33. Winter, E. (2024). Middle class nation building through immigration? *Journal of Ethnic and Migration Studies*, 50(7),1627–1656. ***https://doi.org/10.1080/1369183X.2024.2315348***; Lamont, M. (1992). *Money, Morals, and Manners: The Culture of the French and the American Upper-Middle Class*. University of Chicago Press.

34. Wenger and Zaber (2021), *op. cit.*
35. Delsaux (2023), *op. cit.*
36. Damon, J. (2012). *The middle classes: definitions and situationsStudies,* 416 (5), 605-616. ***https://www.cairn.info/revue-etudes-2012-5-page-605.htm***.

Sociological approaches: the middle class defined by socio-professional status

From the outset, a large body of sociological literature defines the middle class on the basis of its members' level of education and occupations.

Level of education is one of the indicators most often used to define the middle class not only because it embodies the qualifications of individuals, but also because it determines their income and social status. Until recently, teenagers were advised to complete their pre-university studies and postpone marriage and childbearing to secure their place in the middle class[37]. The problem with this definition is that the value of a diploma varies over time and from field to field.

Scientific research usually uses the main occupation to identify members of the middle class. **A number of studies consider occupation to be the most relevant indicator for estimating levels of material acquisition, social status and opportunities in people's lives**. Occupation allows us to understand the objective working conditionsof individuals, i.e., their sector of activity, their working conditions including salary and type of employment contract, their level of qualification or responsibility, and their position in the structure of their organization.

In his classic work on the American middle classes, sociologist Charles Wright Mills[38] already emphasized the diversity of the social composition of the middle classes, which included civil servants, non-manual workers, teachers, workers in emerging professions, etc.

Some of the literature limits the "middle classes" to “intermediate professions” and certain categories of workers and independents. Other works have extended the category to include public-sector executives and "higher intellectual professions[39]". Downstream, the debate remains wide open as to which groups of "employees" and "workers" can be included in the middle classes sphere[40].

37. Zaber, M.A. et Wenger, J. B. (2021b). *Limited Opportunity: Changes in Employment and the American Middle Class*. RAND Corporation. ***https://www.rand.org/pubs/perspectives/PEA1141-8.html***.

38. Mills, C. W. (1967). *Les cols blancs. Essai sur les classes moyennes américaines*. François Maspéro.
39. In France, this expression refers to "salaried scientific teachers and professions who directly apply their highly in-depth knowledge in exact sciences or humanities to research, teaching or health activities of general interest."
40. Bosc (2008), *op. cit.*

Regardless, for Wright Mills, two common traits somewhat unified the growing American middle class in the mid-20th century: belonging to a bureaucracy and being a wage-earner[41].

In the current context of automation and economic uncertainty, this research seeks to determine which educational and career paths provide lasting stability to members of the middle class[42].

Sociological approaches have the advantage of inverting the equation, by asserting that it is position on the labour market and level of education that determine the ability to climb the income ladder and find lifelong employment. In other words, **it is education and occupation that determine access to the economic resources and social mobility that characterize the middle classes**.

Two intellectual traditions underpin this position. On the one hand, Marxian studies, which include in the middle class people who work in administration, law, the army or religion, in order to examine the antagonistic relationship between capital and labour. Made up of workers and the petty bourgeoisie, the middle classes are distinct from the “proletariat” because they do not directly produce added value. Their "mental work" consists of "rituals, knowledge and cultural elements" that separate them from the working class[43]. They find themselves, so to speak, in a " polarized class position " between the bourgeoisie and the working class, which them predisposes them to the possibility of ideological alliances with one or the other. On this basis, and with the growth of intellectual labour and the knowledge economy, a number of class patterns have emerged, notably the one drawn from Barbara and John Ehrenreich's essay on the professional-managerial class, composed of technical employees, managers and cultural producers[44] or that of Finnish sociologist Markku Kivinen, based on power processes and types of autonomy in the workplace[45].

On the other hand **Weberian approaches** consider that inequalities between classes arise from the division of labour, rather than from the structure of ownership or control of the means of production. In this perspective, Nuffield's class schema was developed in the post-war period to make sense of the complex division of labour that emerged in advanced industrial capitalism, including the great bureaucracies. This scheme identifies three categories of class:a service class, an intermediate class and a working class. The service class is made up of professionals, managers and administrators. The intermediate class is made up of salespeople, office workers, technicians-and other professionals-who play a supervisory role or whose tasks require training. Skilled and unskilled workers are part of the working class.

41. Mills (1967), *op. cit.*
42. See Zaber and Wenger (2021b), *op. cit.*

43. Kivinen, M. (1989). The New Middle Classes and the Labour Process. *Acta Sociologica*, 32(1),53-73. ***https://doi.org/10.1177/000169938903200103***.
44. Ehrenreich, B. and Ehrenreich, J. (1977). The Professional-managerial Class. *Radical America*, 11(2), 7-32. ***https://library.brown.edu/pdfs/1125403552886481.pdf***.
45. Kivinen (1989), *op. cit.*

The Nuffield scheme was adopted by the UK Office for National Statistics in 2000 as the official measure of the country's social classes. Using this tool, which incorporates sociologist Pierre Bourdieu's[46], concepts of social and cultural capital, large-scale national studies have been carried out to determine how different stocks of social, cultural and economic capital interact to produce class positions, including that of the middle classes. One of the most important is the Great British Class Survey (GBCS), conducted by Mike Savage and his colleagues at the London School of Economics. The conclusions of this research do not fit within the boundaries of the scheme. of Nuffield scheme. Instead, they led to a new seven-point class scheme[47].

At either end of this schema are the elite and the precariat. Between the two exist an " established middle class "a"technical middle class "of " new affluent workers "a" traditional working class "and" new service workers"[48].
The established middle class is made up of people with a wide range of professional activities who are comfortably well-off, without having the extreme wealth of the elite.

The technical middle class is made up of scientifically and technically oriented people, who form a prosperous group with a secure economic position in society. The main difference between the established middle class and the technical middle class lies in the fact that the former is more socially connected than the latter. This scheme also has the advantage of identifying intermediate groups - who live with a certain level of vulnerability - between the middle classes and the precariat.

In Canada, long-standing data on mobility and occupations are available through the census, but much remains to be done to fill in variations between census years, nor are there any longitudinal data sets that incorporate questions on taste (cultural preferences) or cultural capital more generally. Similarly, there is very little longitudinal data on private wealth accumulation in Canada. These data limitations make it difficult to use the class scheme of Mike Savage and his collaborators in Canadian research.

46. Bourdieu, P. (1979). The three states of cultural capital. Actes de la recherche en sciences sociales, 30, 3-6; Bourdieu, P. (2016). *La distinction*. Éditions de Minuit.
47. This scheme incorporates data on household income and savings, as well as questions on social networks and cultural knowledge to identify boundaries. Education and tastes play an important role in class formation.
48. Savage, M., Devine, F., Cunningham, N., Taylor, M., Li, Y., Hjellbrekke, J., Le Roux, B., Friedman, S. and Miles, A. (2013). A New Model of Social Class? Findings from the BBC's Great British Class Survey Experiment. *Sociology*, 47(2),219-250. ***https://doi.org/10.1177/0038038513481128***.

Nevertheless, sociologist Simon Langlois has attempted a new schema of social classes in Quebec. It is composed of 48 micro classes aggregated into 12 major classes: senior managers, professionals, middle managers and directors, middle professionals, technicians, owners and entrepreneurs, farmers and fishermen, foremen and supervisors, office workers, sales employees, service employees, manual and blue-collar workers. The decline in the relative weight of old social classes (among workers and employees) and the emergence of new classes, especially at the top of the widening social hierarchy, have transformed the social structure of Quebec society[49]. This method enabled the sociologist to confirm that Quebec's middle classes continue to evolve. They have become more feminized. Some of the associated occupations have moved up the social pyramid and others down. Technicians (in healthcare, IT, communications, industry and construction) occupy a greater place. But a significant proportion of workers and labourers have less access today than in the past.

49. Langlois, S. (2021). The social stratification of Quebec society, revisited and updated, 1971-2016. *Les cahiers des dix*, (75), 149-200. ***https://doi.org/10.7202/1088875ar***.

Economic approaches: the middle class defined as an economic rank

Economists tend to favour economic definitions of the middle class, particularly those based on economic resources such as income or wealth.

Income

The most common metric in the literature is the distance with regard to median income, or that which separates the population into two equal parts. This metric is widespread not only for reasons of convenience (the most available data are based on income), but also because income tends to be strongly correlated with other attributes of social class, such as economic security, levels of education and consumption preferences[50]. It is used to distinguish social classes[51].

From this perspective, the middle classes are positioned in relation to the lower and upper classes in intervals defined by median income. As shown in Table 2, different ranges are proposed for this purpose[52].

50. Reeves, R. V., Guyot, K. and Krause, E. (2018b). Defining the middle class: Cash, Credentials, and Culture. *The Brookings Institution*. ***https://www.brookings.edu/research/defining-the-middle-class-cash-credentials-or-culture/***.
51. With this definition, even the middle class can be understood as a heterogeneous population divided into several segments such as the lower-middle class, the middle-middle class and the upper-middle class..
52. Pew Research Center (2015). The American Middle Class Is Losing Ground: No longer the majority and falling behind financially. Washington, D.C.: December. ***https://www.pewresearch.org/social-trends/2015/12/09/the-american-middle-class-is-losing-ground/#fnref-21084-1***; OCDE (2019), op. cit. ; Thurow, L. C. (1984, 5 février). Business Forum; the Disappearance of the Middle Class. *The New York Times*. ***https://www.nytimes.com/1984/02/05/business/business-forum-the-disappearance-of-the-middle-class.html***; Birdsall, N., Graham, C. and Pettinato, S. (2000). *Stuck in the Tunnel: Is Globalization Muddling the Middle Class?*, Working Paper No. 14, Center on Social and Economic Dynamics. ***https://www.brookings.edu/wp-content/uploads/2016/06/midclass.pdf***.

None of them are to be considered as good or bad; each one allows us to see the middle classes in a new light. These indicators must therefore be interpreted with caution, and in the context of inflation and changes in household composition such as smaller families and an ageing population.

Researchers from the Brookings Institute have gathered 12 different measures of the middle class based on adjusted household income. In one of the most widely cited definitions, the Pew Research Center defines the middle class as households with incomes between two-thirds (67%) and double the national median. Alan Krueger popularized the definition of an income bracket ranging from 50% to 150% around the median[53]. Likewise, several researchers used Lester C. Thurow's narrower range of 75% to 125% of median income. Others have extended the upper limit to 200%, 225% or even 300% of median income. For example, Blackburn and Bloom[54] preferred a definition based on the 60%-225% range of median income. The OECD, for its part, has chosen an interval from 75% to 200% of median adjusted disposable income, i.e., after taxes and transfers, and adjusted according to household size (Table 2).

53. The most recent study by the Pew Research Center (2024) defines the middle classes as households with incomes between at from two-thirds to double the median household income in the United States, i.e., from $56,600 to $169,800 in 2022. See Fry, R. (2024). Are you in the American middle class? Find out with our income calculator. Pew Research Center. ***https://www.pewresearch.org/short-reads/2024/09/16/are-you-in-the-american-middle-class/***.

54. Blackburn, M. and Bloom, D. (1987). Earnings and Income Inequality in the United States, *Population and Development Review*, 13(4), 603.

Table 2. Middle-class definitions based on adjusted median income

Criteria	Scales	Annual income intervals	Reference
Adjusted household income	67% - 200% of median income (2016 $)	$31,402 - $188,412 (household of 3)	Pew Research Center (2015)
Adjusted household income	67% - 200% of median income (2016 $)	$56,600 - $169,800 (household of 3)	Pew Research Center (2024)
Adjusted household income	75% - 125% of median income	$52,000 - $87,000	Lester C. Thurow (1984)
Adjusted household income	67% - 200% of median income (2016 $)	$35,000 - $139,000	Richard V. Reeves et al. (2018)
Adjusted household income		$35,000 - $100,000	Mark J. Perry (2018)
Adjusted family income	50% - 150 of median income	$24,722 - $74,992	Alan B. Krueger (2012)
Adjusted family income	75% - 200% of median income		OCDE (2019)
Adjusted family income	75% - 150% of median income		Statistique Canada (2007)[55]
Adjusted family income	75% - 150% of median income	$57,000 - $114,000 (household of 4)	Genest-Grégoire et al. (2020)

Sources : Richard V. Reeves et al. (2018a). A dozen ways to be middle class; Richard V. Reeves et al. (2018b). Defining the middle class: Cash, credentials, or culture; Antoine Genest-Grégoire et al. (2020). Never too rich to be middle-class.

55. Heisz, A. (2007). *Income Inequality and Redistribution in Canada: 1976 to 2004*. Statistics Canada Catalogue 11F0019MIE, 298, 27.

This method, which measures changes in the size of the middle classes (number of people and households), is ideal for comparative or longitudinal studies. It however remains relative as it brings together people with dissimilar economic situations under the same umbrella. For example, it can refer to a household made up of a 20-year-old single mother with two young children and earning an annual income of $25,000 as well as another made up of two adults aged 55 and an 18-year-old child with an annual family income of $210,000. Estimates derived from the median adjusted income vary considerably, but most fall within a range of approximately $ 50,000 to $125,000$[56].

Other works have preferred the method based on a measure of household income dispersion. They perceive the middle class as a fixed population located in the middle of the distribution, between the two extreme classes, and divided into several segments such as the lower middle class, the intermediate middle class and the upper middle class. Here again, as Table 3 shows, opinions are divided on the entry and exit thresholds and the populations affected.

Table3. Definitions of middle classes based on population distribution according to household income

Criteria	Scales	Annual income intervals	Reference
Household income	20th - 80th percentile	$30,000 - $134,000	W. Easterly (2001); Lévy (1987)
Household income	30th - 90th percentile	$43,000 - $179,000	Antonio Estache and Danny Leipziger (2009)
Household income	30th - 80th percentile	$43,000 - $134,000	Joan Williams and Heather Boushey (2010)
Household income	40th - 50th percentile	$55,000 - $69,000	Era Dabla-Norris et al. (2015)
Household income	20th - 60th percentile	$30,000 -$86,000	Richard V. Reeves and Camille Busette (2018)

Sources : Richard V. Reeves et al. (2018a). A dozen ways to be middle class; Richard V. Reeves et al. (2018b). Defining the middle class: Cash, credentials, or culture.

56. Schwabish, J. (2019). *How We Define "Middle Class" Has Broad Implications*. Urban Institute. *https://www.urban.org/urban-wire/how-we-define-middle-class-has-broad-implications*.

The poverty line

Another common metric is distance from the poverty line. Here, entry into the middle class is determined according to the gap between a household's income and the poverty line. Stephen Rose[57] establishes the threshold for entry into the American lower middle class at an income equivalent to 150% of the official federal low-income threshold, or around $30,000 for a family of three. For Haskins and Sawhill, the bar should be set at 300% of the threshold[58].

Table 4. Definitions of middle classes based on the poverty line

Criteria	Scales	Annual income intervals	Reference
Poverty line	150% - 500% of threshold	$29,000 - $96,000	Stephen J. Rose (2016)
Poverty line	300% - 500% of threshold	$60,000 - $100,000	Ron Haskins and Isabel V. Sawhill (2009)

Sources : Richard V. Reeves, Katherine Guyot and Eleonor Krause (2018a). A dozen ways to be middle class; Richard V. Reeves, Katherine Guyot and Eleonor Krause (2018b). Defining the middle class: Cash, credentials, or culture.

Other studies have been based on absolute household purchasing power. This measure is widely used in international comparisons, especially between less affluent countries.

Thus, for Homi Kharas[59], the middle class is made up of people earning between $11 and $110 ($2011 in purchasing power parity [PPP]) per person per day, whereas for Luis Lopez-Calva and Eduardo Ortiz-Juarez[60], the upper bound is limited to $50 per person per day. In the United States, the annual income of middle-class households ranges from $35,000 to $100,000 according to Mark Perry[61], while the entry threshold is set at $50,000 by Harry Holzer[62], especially for young households (aged 25 to 54 years old).

57. Rose, S. J. (2016). *The growing size and incomes of the upper middle class*. Urban Institute, 21,10. ***https://www.urban.org/sites/default/files/publication/81581/2000819-The-Growing-Size-and-Incomes-of-the-Upper-Middle-Class.pdf***.
58. Haskins, R. and Sawhill, I. V. (2009). *Creating an Opportunity Society*. Brookings Institution Press.
59. Kharas, H. (2010). *The Emerging Middle Class in Developing Countries*. OECD Development Centre. Working Paper 285. OCDE. ***https://www.oecd-ilibrary.org/development/the-emerging-middle-class-in-developing-countries_5kmmp8lncrns-en***; Kharas, H. (2017). *The unprecedented expansion of the global middle class. An Update. Global Economy and Development.* Working Paper 100. Brookings Institution. ***https://www.brookings.edu/articles/the-unprecedented-expansion-of-the-global-middle-class-2/***.
60. López-Calva, L. and Ortiz-Juarez, E. (2014). A Vulnerability Approach to the Definition of the Middle Class, *Journal of Economic Inequality*, 12(1), 23-47. ***https://doi.org/10.1007/s10888-012-9240-5***.
61. Perry, M. J. (2018, 31 janvier). Yes, the US Middle Class Is Shrinking, but It's Because Americans Are Moving Up. And No, Americans Are Not Struggling to Afford a Home. ***https://www.aei.org/carpe-diem/yes-the-us-middle-class-is-shrinking-but-its-because-americans-are-moving-up-and-no-americans-are-not-struggling-to-afford-a-home/***.
62. Holzer, H. (2017). *Building a New Middle Class in the Knowledge Economy*. McCourt School of Public Policy. ***http://www.progressivepolicy.org/wp-content/uploads/2017/04/PPI_MiddleClassJobs_2017.pdf***.

Wealth

Wealth is another measure of the resources available to middle-class households. In 2023, a Charles Schwab survey revealed that, in North America's largest cities, it is necessary to possess wealth ranging from $500,000 to $1 M to be financially comfortable (middle class) and from $2 M to $4 M to rank among the wealthy. Economist Edward Wolff defines the middle class as the three intermediate quintiles of wealth distribution[63]. The wealth of the 20% most affluent is heavily concentrated in investment assets, including real estate, commercial equities, stocks and bonds. Housing, on the other hand, accounts for over 60% of middle-class assets (the three middle quintiles), although mortgage debt accounts for almost half the value of these homes. So, as much as home ownership seems to be a defining characteristic of the middle class, so too is mortgage debt[64].

Although income is the most common economic measure, followed by wealth, some research emphasizes other economic variables, including consumption, economic vulnerability or financial risk. For example, Meyer and Sullivan argue that spending is a better gage than income and wealth for defining the boundaries of the middle class[65].

According to Nobel economics prize-winners Abhijit Banerjee and Esther Duflo, middle-class status in third-world countries is rather determined by daily per capita expenditure, i.e., from $2 to $10 per day[66]. Martin Ravallion raised the upper limit to $13 per day, all amounts being below the U.S. poverty line[67]. Other studies focus on specific measures of vulnerability to poverty, income volatility or on the economic progress of specific individuals or families over time.

63. Wolff, E. N. (2017). *Household Wealth Trends in the United States, 1962 to 2016: Has Middle Class Wealth Recovered?*, NBER Working Paper No. 24085. ***https://www.nber.org/system/files/working_papers/w24085/w24085.pdf***
64. Wolf (2017), op. cit.; Reeves et al. (2018), op. cit.
65. Meyer, B. D. et Sullivan, J. X. (2012). *Winning the War: Poverty from the Great Society to the Great Recession*, Brookings Papers on Economic Activity. ***https://www.brookings.edu/wp-content/uploads/2012/09/2012b_meyer.pdf***.

66. Banerjee, A. V. et Duflo, E. (2008). What Is Middle Class about the Middle Classes around the World?, *Journal of Economic Perspectives*, 22(2), 3-28.
67. Ravallion, M. (2010). The Developing World's Bulging (but Vulnerable) Middle Class. *World Development.* 38(4),445-454. ***https://doi.org/10.1016/j.worlddev.2009.11.007***.

The middle classes in Canada and Quebec

Most methods for estimating the size of the middle classes have been used in Canada and Quebec. In the vast majority of cases, empirical studies define the middle class as a fixed interval around median income[68]. The thresholds used vary, but some of the most commonly used include the 75% and 150% range of the adjusted median income and the OECD range which varies from 75% to 200% of the national median income. Thus, in her study of income mobility within the middle classes, Marie Connolly defines the middle class as having an income of between 75% and 150% of the median[69]. This class is divided into two categories: the lower middle class and the upper middle class. The lower middle class extends to the median, and the upper middle class is above the median.

Generally speaking, analyses on the importance of the middle classes is mixed: some research[70], points to a decline, while others[71], see progress. A large body of literature states that the middle classes have declined slightly in Canada, from 52% of the population in 1976 to 48% in 2010. James Foster and Michael Wolfson (2010) for their part observed that the middle classes had remained relatively stable during the 1990s and 2000s. Economists François Delorme and Luc Godbout showed that when compared to results from Quebec, those of Canada also suggest a reduction in access to the middle classes. Their analysis shows a slight decrease in the size of the Canadian middle classes, from 47.6% of households in 1976 to 43.7% in 2011[72].

68. Foster and Wolfson (2010), op. cit.; Beach (1988), *op. cit.*
69. Connolly and Demontigny (2021), *op. cit.*
70. Atkinson, A. B. et Brandolini, A. (2013). On the identification of the middle-class. dans J. C. Gornick et M. Jäanti (ed.), *Income inequality: economic disparities and the middle class in affluent countries* (77-100), Stanford University Press ; OCDE (2014). All on board: making inclusive growth happen. The OECD defines the middle class as the three quintiles in the middle of the income distribution.
71. Leonhardt, D. and Kealy, K. (2014, 22 avril). The American Middle Class Is No Longer the World's Richest, *The New York Times*. *https://www.nytimes.com/2014/04/23/upshot/the-american-middle-class-is-no-longer-the-worlds-richest.html?_r=0&abt=0002&abg=0*.
72. Delorme and Godbout (2017), *op. cit.*

In Quebec, after a significant rise over the course of the 20th century, the size of the middle classes remained stable over the 1982-2008 period[73].
According to Delorme and Godbout (2017), Quebec's middle classes grew between 1976 and 2010, when considering income after taxes and transfers (i.e., after government intervention). Overall, in 2010, on the basis of the 75%-150% 150% of median disposable income (after tax) per consumption unit, approximately half of households (47%) belonged to the middle classes in Quebec. The lower and upper classes accounted for 32 and 22% of households, respectively[74]. According to Régis Bigot and Simon Langlois, the middle classes are larger in Quebec (61%) than in the rest of Canada (57%)[75].

Analysis of the latest data from Statistics Canada's 2019 Survey of Financial Security corroborates this assertion revealing, for 2019, larger middle classes in Quebec than in Canada as a whole. Table 5 shows that the size and shares of income and wealth of Quebec's middle classes are greater than those of Canada as a whole.

Table 5. Middle-class parameters and shares of income and wealth, Canada and Quebec, 2019

	Median adjusted income	75%	200%	Size	Revenue share	Share of assets
Canada	$43,325	32 494 $	86 650 $	55,1%	60,3%	54,4%
Quebec	$40,500	$30,375	$81,000	59,0%	66,6%	59,7%

Source : Analyses by the Observatoire québécois des inégalités based on the Survey of Financial Security P ublic Use Microdata File, 2019, Statistics Canada.

The literature rightly links the performance of Quebec's middle classes to the higher level of taxation and transfers in the province. "If it were left to the market, argues Simon Langois, the proportion of middle-class households would have fallen significantly, from one-third to one-quarter of households between 1982 and 2008[76]."

The data in Table 6 show that, whatever the scale considered, government transfers and taxes enable a large number of households to remain in the middle classes in Quebec. The economists François Delorme and Suzie St-Cerny are unequivocal: "The arsenal that includes, among other things, family allowances, various benefits, tax credits and progressive taxation are proving effective in keeping the proportion of Quebec households in the middle class intact[77]"

73. Langlois (2010), *op. cit.*
74. Delorme and Godbout (2017), *op. cit*.
75. Bigot R. and Langlois, S. (2011). Consumption and deprivation among the middle classes in Canada and France. . *L'Année sociologique*, 61(1),21-46. *https://doi.org/10.3917/anso.111.0021*.
76. Langlois (2010), *op. cit*., p. 130.
77. Delorme and St-Cerny (2014), *op. cit*., p. 19.

Table 6. Size of social classes by concept and income range, Quebec, 2018

	75% to 150% of median income			75% to 200% of median income		
	Market income	Total income	Disposable income	Market income	Total income	Disposable income
Underprivileged class	37%	33%	29%	37%	33%	29%
Middle class	33%	44%	52%	47%	58%	64%
Favoured class	30%	23%	19%	16%	10%	7%

Source : Analyses by the Observatoire québécois des inégalités based on the Survey of Financial Security P ublic Use Microdata File, 2019, Statistics Canada.

The resilience of Quebec's middle classes is also linked to the higher level of education among its population[78]. Thus, participation in the middle classes is increasing for all levels of schooling, with the exception of those without diplomas. When compared with the trend from 1976 to 2011, we see an increase in the share of the middle classes at all levels of education from the secondary level onward. This increase is particularly pronounced at the post-secondary and university levels. Delorme and Godbout found, from 1978 to 2011, a noticeable decrease in the proportion of people without diplomas in the middle classes (down from 37% to 30%) and a significant increase in this group among low-income earners (from 55% to 70%). They rightly point out that in 1976 people v constituted the largest group (in terms of size) among the middle classes (20%), a situation radically different from that of 2011, where post-secondary graduates represent the most largest cohort (26%)[79].

78. Other studies have documented the correlation between education and entry into the middle class. The study by Power, Edwards and Wigfall (2003) took a sociological look at the impact of greater access to state schools in England and the structure of social classes, including the middle class. The authors-eexamined how greater access to state schooling and the emergence of private schooling have altered, over time, the place of the middle class in English society during the 20th century. A more recent American study has established a link between the level of education and "social promotion". It revealed that in 2014, 58% of middle class (and upper-middle class) people held a post-secondary diploma, compared to only 26% in 1979. See Sally Anne Power et al (2003). Education and the Middle Class, British Journal of Educational Studies, 51(4), 427-428; Rose (2016), *op. cit.*
79. Delorme and Godbout (2017), *op. cit.*

In Canada, there is every indication that access to the middle classes is lower than in Quebec for all levels of schooling, with the exception of those without diplomas. This link becomes more robust as individuals gain higher levels of education. However, this trend seems less evident in 1976 than in 2011. In 1976, middle-class access peaked at secondary school level (49%). In 2011, it peaked at the post-secondary level (55%)[80].

Another study by the Institut de la statistique du Québec identifies education level and family type (single-parent versus two-parent) as the most important determinants of income distribution in Quebec[81] However, family background seems to have a greater influence on the increase in social mobility that leads to the middle classes than level of education[82].
Conversely, the results of the study by Marie Connolly and Charles Demontigny[83] show that a change of family type is associated with a greater number of downgrades, particularly in the case of single-parent families. A change in the number of children also increases downward mobility.

80. Delorme and Godbout (2017), *op. cit.*
81. Institut de la statistique du Québec. (2014, février). *A look at two decades of changes in the educational level of the Quebec population, based on the Labour Force Survey*, no 30.
82. Bartik, T. and Hershbein, B. (2016). *College grads earn less if they grew up poor*, The Upjohn Institute. ***https://research.upjohn.org/reports/219/***.
83. Connolly, M. and P.-Demontigny, C. A. (2021). *Income Mobility among Middle-Class Households*. [Report prepared for Employment and Social Development Canada]. ***https://grch.esg.uqam.ca/wp-content/uploads/sites/82/Final_report_ESDC_2021-03-03.pdf*** .

Conclusion

The expression " middle class " was first popularized during the thirty glorious years period (1945-1975), against a backdrop of strong economic growth and rising living standards in most industrialized countries. In the West, the idea of the middle class stemmed from the post-war promise of intergenerational mobility through, among other things, the democratization of education, the promotion of the right to work and school enrollment as an effective vehicle for social promotion or mobility. It is the fruit of an egalitarian ideal in democratic societies. In the case of Quebec, it is part of the ideal of the Quiet Revolution.

The literature review did not paint a complete and nuanced picture. Instead, it led to a nebulous array of subjects, definitions and measures, which makes it difficult for any person attempting to formulate a set opinion. It has exposed the lack of longitudinal data needed to develop complex patterns of social stratification integrating economic, social, cultural and symbolic capital. The social realities to which this concept refers are varied, and sometimes divergent.

There is no definitive method for delimiting the sociological boundaries of the middle classes. The choice of measurements, whatever they may be, are necessarily arbitrary. But the new class diagrams that have been developed help us to get around the limits of the middle-class concept, and to better appreciate the grid for interpreting social inequalities that it offers us.

An overview of the literature does not point to a general decline in the middle classes even though, in Canada more than in Quebec, the downgrading of the middle classes is becoming a major source of concern. The literature shows that the middle classes are larger and more resilient in Quebec than in Canada, thanks to the intervention of the welfare state through transfers and taxation. It shows that transformations in the social fabric (feminization of the workforce, schooling, knowledge economy) have had the effect of significantly transforming the composition of the middle classes. Part of these even migrated upwards, with more high-income households in society. The losers, in this process, are single-parent families, one-person households and single-income families, whose socio-economic situation has deteriorated significantly[84].

84. Delorme and St-Cerny (2014), *op. cit.*