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Intergenerational Mobility in Education: Measurement, Impacts, and Determinants

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Abstract

Intergenerational educational mobility serves as a core metric for gauging equality of opportunity, capturing how educational advantages are transmitted across generations within a society. Drawing on a meta-analysis of domestic and international empirical literature, this paper systematically reviews prevailing measurement frameworks, socioeconomic consequences, and multi-layered driving factors of intergenerational educational mobility. From a measurement perspective, absolute and relative mobility frameworks each carry distinct merits and limitations. Relative mobility indicators are better suited for cross-national and cross-temporal comparative analyses, yet incomplete parental education records can introduce severe estimation bias. In terms of socioeconomic outcomes, upward educational mobility is documented to narrow income gaps, mitigate consumption inequality, upgrade employment quality, boost physical wellbeing, and strengthen social trust. Nevertheless, these gains are unevenly distributed across gender, age groups, and urban-rural populations. Upward mobility also comes with latent downsides, including overeducation and chronic psychological strain. When it comes to formative drivers, macro-institutional arrangements, societal structural features, and household capital endowments together constitute a multi-tiered explanatory framework for intergenerational educational mobility. Cross-country evidence further confirms that income disparity substantially erodes the capacity of economic growth to foster educational mobility. This paper proposes three key directions for future research: cross-context comparative analysis of mobility costs, localized examinations of data truncation bias, and dynamic explorations of how institutional transformations reshape educational mobility patterns.

Keywords

Intergenerational educational mobility; Absolute mobility; Relative mobility; Income inequality; Gender heterogeneity

1. Introduction

Intergenerational educational mobility describes the shift in children's educational attainment relative to their parents' schooling levels: upward mobility means offspring outperform their parents academically; downward mobility refers to a

decline in educational achievement; and persistent mobility denotes unchanged intergenerational educational status (Li Rongbin, 2020). This construct bears profound significance, as it not only concerns individuals' equitable access to education but also reflects the openness of social hierarchies and the equitable allocation of life chances (Lin Wanjuan & Zhang Ge, 2015). If educational attainment among the general population is highly correlated with parental schooling backgrounds, educational opportunities are likely to be monopolized by privileged families, leaving children from disadvantaged households with limited pathways to transform their socioeconomic fate through education. Over recent decades, scholars at home and abroad have amassed abundant empirical findings on intergenerational educational mobility, covering cross-national comparisons, single-country case studies, macro policy evaluations, micro household-level mechanisms, and outcome dimensions ranging from income and consumption to public health and social trust. This paper synthesizes existing scholarship to address three central research questions: First, how should intergenerational educational mobility be operationalized and measured? Second, what socioeconomic ramifications arise from intergenerational educational mobility? Third, which forces facilitate or impede cross-generational educational advancement ?

2. Measuring Intergenerational Educational Mobility

2.1. Two Dominant Measurement Frameworks

Two primary analytical paradigms have been established in the extant literature to quantify intergenerational educational mobility: absolute mobility and relative mobility. The two frameworks conceptualize cross-generational educational shifts from divergent perspectives and apply to distinct research scenarios.

Absolute intergenerational educational mobility focuses on the tangible gap between children's and parents' formal schooling credentials. Two mainstream empirical approaches fall under this paradigm. The threshold method sets a fixed educational cutoff to identify mobility events. For instance, Xu Yingdong & Yu Xiao (2025) study households where both grandparents and parents attained junior high school education or less, defining upward mobility as children earning a bachelor's degree or above. Fang Yingfeng & Xia Qiwei (2024) adopt an alternative cutoff: upward mobility occurs when children complete high school while both parents fail to reach this benchmark.

The mobility distance method quantifies intergenerational educational disparities by converting academic credentials into years of formal schooling. Examples include the Intergenerational Educational Mobility Index constructed by Zhao Yuan et al. (2022), as well as the regression coefficient β developed by Lin Wanjuan & Zhang Ge (2015) to measure the intensity of educational intergenerational transmission.

Absolute mobility boasts straightforward, intuitive interpretation and facilitates causal identification at the household level. However, its core drawback lies in

extreme sensitivity to educational expansion and credential inflation. Identical numerical gaps in schooling years carry vastly different socioeconomic implications across parental and child cohorts, rendering cross-period and cross-regional comparisons unreliable.

Relative intergenerational educational mobility centers on the rank correlation between two generations within their respective birth cohorts, eliminating confounding structural factors such as nationwide educational expansion. Multiple empirical strategies are widely adopted in this stream of research. Lü Wei et al. (2020) implement rank-rank regression, benchmarking households where fathers fall at the 25th educational percentile to calculate the expected educational rank of descendants, thereby constructing a city-comparable intergenerational mobility index. Dong Tiantian & Mao Zhonggen (2025) define regional educational mobility as one minus the intergenerational regression coefficient.

The transition matrix method computes aggregate metrics, including upward mobility rates, downward mobility rates, and status inertia rates, by building a probability transition matrix mapping parental to offspring educational attainment. The relative educational stratification method further categorizes schooling into two-tier (high/low) or three-tier (high/mid/low) hierarchies to delineate diverse mobility trajectories (Zhang Shun & Li Shiyang, 2023; Cheng Lanyan & Dong Yi, 2026). Beyond enabling consistent intertemporal comparison, this framework allows granular heterogeneous analysis of outcomes across distinct mobility types.

2.2. Truncation Bias and Methodological Pitfalls in Cross-National Research

Relative mobility indicators demonstrate unique strengths in cross-country comparative work. Analyzing PIAAC survey data covering 30 nations, Lee & Lee (2020) highlight pervasive right-censoring flaws in parental education variables: most surveys only record “college education and above” without differentiating between associate, bachelor’s, and postgraduate degrees. If left unadjusted, standard ordinary least squares regression drastically overstates intergenerational transmission coefficients.

The authors adopt the threshold regression framework for truncated covariates proposed by Qian et al. (2018) and find that unadjusted mobility estimates are approximately 50% higher than bias-corrected results. This insight delivers a critical methodological reminder for domestic scholarship: overlooking measurement error and truncation bias may lead to systematic misjudgments regarding intergenerational educational mobility.

3. Multidimensional Socioeconomic Consequences of Intergenerational Educational Mobility

3.1. Income and Household Consumption

In terms of income distribution, Cheng Lanyan & Dong Yi (2026) leverage CFPS data to verify that upward educational mobility significantly narrows individual income gaps relative to downward mobility, with more pronounced effects among younger cohorts, women, and urban residents. Mechanism tests reveal three core transmission channels: upgraded employment quality, expanded health capital accumulation, and improved digital literacy.

Yaish et al. (2021) adopt a life-course perspective by analyzing the U.S. NLSY79 longitudinal dataset. For male respondents, parental educational background generates substantial cumulative lifetime advantages: individuals with stable high educational status accrue roughly $520,000 more career earnings than upwardly mobile counterparts. For women, however, parental schooling exerts no meaningful direct effect on lifetime income, whose accumulation aligns closely with human capital theory predictions. This disparity implies that lifting women's educational attainment alone cannot close gender wage gaps; household labor division burdens and labor market structural barriers exert far stronger income constraints on women than men.

On the consumption front, Dong Tiantian & Mao Zhonggen (2025) document that regions with higher intergenerational educational mobility exhibit lower household consumption inequality. The underlying mechanism operates as follows: cross-generational educational advancement alleviates subjective relative deprivation in consumption by boosting household social capital and stimulating entrepreneurial activity. Notably, this equalizing effect holds solely for urban households and disappears among rural families, exposing unevenly distributed mobility benefits under China's urban-rural dual system.

3.2. Employment Quality and Population Health

Zhang Shun & Li Shiyang (2023) classify respondents into four mobility archetypes and identify a clear gradient in employment quality: individuals with persistent high educational status rank highest, followed by upwardly mobile groups, then downwardly mobile respondents, while those with persistent low educational status face the poorest employment outcomes. The root disadvantages differ across mobility profiles: households with persistent low education and downwardly mobile individuals suffer from low rates of formal labor contracts, whereas upwardly mobile youth primarily grapple with severe overeducation and job-skill mismatch. Disparities in youth employment prospects are widening over time, indicating that the socioeconomic ramifications of educational mobility accumulate dynamically across the life course.

Within public health research, Li Rongbin (2020) finds that greater upward educational mobility distance correlates with superior self-reported physical health, with the strongest improvements observed among children who earn bachelor's degrees or higher while their fathers received no formal schooling. Rising

disposable income, adoption of healthy lifestyles, enhanced subjective wellbeing, and participation in medical insurance collectively mediate the health benefits of upward mobility.

Nevertheless, cross-national research by Gugushvili et al. (2018) covering Belarus, Hungary, and Russia paints a more nuanced picture. The link between educational mobility and health-risk behaviors such as excessive drinking and smoking varies drastically by nation, gender, mobility direction, and behavioral type, precluding universal theoretical explanations. Downwardly mobile men display higher rates of alcohol abuse, while upwardly mobile women face elevated smoking risks. These patterns partially validate the disembedding hypothesis from social mobility research: individuals experiencing upward mobility endure latent psychological costs, including fractured social networks and persistent identity confusion.

3.3. Social Trust

Lü Wei et al. (2020) construct intergenerational educational mobility indices for 114 prefecture-level Chinese cities and confirm that regions with stronger cross-generational mobility feature higher average resident social trust. This trust premium concentrates primarily on upwardly mobile citizens whose parents have low levels of education: improved self-perceived economic standing and attenuated subjective wealth gaps foster greater faith in social institutions. This finding carries weighty policy implications: intergenerational educational mobility matters not only for material welfare but also for sustaining social cohesion by shaping public perceptions of distributive fairness.

4. Determinants Shaping Intergenerational Educational Mobility

4.1. Macro-Institutional Factors: Educational Expansion and Housing Market Reform

Regarding educational expansion, Luo Chuliang & Liu Xiaoxia (2018) decompose mobility into structural and cyclical components. Basic education expansion disproportionately benefits children from less educated families, while higher education expansion primarily benefits urban households and highly educated parents. More crucially, the mobility-promoting capacity of educational expansion has weakened for younger generations.

Peng Jun & Zhao Xiliang (2022) evaluate two landmark policies: the 1986 Compulsory Education Law and the 1999 higher education enrollment expansion. Both interventions significantly lift educational mobility for rural households, with policy gains concentrated among rural families with low parental schooling, moderate household income, and residence in regions with scarce tertiary education resources.

Cross-country analysis by Lee & Lee (2020) unpacks systemic macroeconomic drivers. Higher economic development levels correlate with stronger

intergenerational mobility, while severe income stratification solidifies educational intergenerational persistence. Inflation also substantially suppresses mobility potential. The distribution of public education spending generates divergent effects: increased primary education investment boosts cross-generational advancement, whereas expanded tertiary public spending inhibits mobility, consistent with Luo Chuliang & Liu Xiaoxia's domestic findings. Additionally, heavy household debt burdens entrench educational intergenerational transmission, confirming that binding credit constraints perpetuate cross-generational educational privilege and disadvantage.

Turning to housing institutional reform, Zhou Huadong et al. (2024) demonstrate that housing marketization significantly elevates intergenerational educational mobility among urban households via two channels: the neighborhood environmental effect and the household wealth effect. Less educated families reap the largest benefits, with stronger impacts observed in households with young children and daughters.

4.2. Structural Barriers: Urban-Rural Stratification, Occupational Dualism, and the Hukou System

Fang Yingfeng & Xia Qiwei (2024) quantify the urban-rural mobility gap: urban children face a 22.5 percentage-point higher probability of upward educational mobility than rural peers. Roughly one-third of this gap stems from uneven urban-rural educational infrastructure, while two-thirds derive from inherent ability disparities between urban and rural youth. Among post-1990 birth cohorts, the environmental component of the urban mobility premium—i.e.,, the advantage derived from better educational infrastructure—is shrinking, a trend closely tied to compulsory education equalization reforms.

Emran et al. (2023) draw cross-institutional insights through a comparative study of rural China and India. Chinese rural males educated in the 1980s and 1990s exhibit far greater educational mobility than their Indian counterparts. In India, paternal non-agricultural employment and educational attainment reinforce one another to shape sons' schooling outcomes; in China, these two factors operate independently. The institutional root of this divergence lies in China's household registration (hukou) system, which historically restricted rural-urban migration and weakened the intergenerational transmission of non-farm occupational advantages. However, rural China's younger cohorts are converging toward India's mobility pattern, with non-agricultural households' educational premium expanding—a signal that relaxed hukou restrictions and marketization are reshaping China's intergenerational educational mobility landscape.

4.3. Household Endowments: Multidimensional Family Capital and Kinship Spillovers

At the household level, Zhao Yuan et al. (2022) examine five dimensions of family capital—political, economic, cultural, social capital, and comprehensive family socioeconomic status. Economic capital exhibits a ceiling effect: elevated parental socioeconomic status creates barriers blocking children's further educational advancement. Cultural capital's influence presents distinct gender asymmetries: sons' schooling correlates more strongly with paternal years of education, while daughters' attainment is more sensitive to maternal schooling. Overall, women face weaker origin-family constraints and achieve superior cross-generational educational mobility relative to men.

Xu Yingdong & Yu Xiao (2025) identify a kinship spillover effect in educational mobility: upward mobility among parental siblings drastically raises children's odds of academic advancement. Maternal-line kinship spillovers outweigh paternal-line effects, whereas larger sibling cohorts dilute this positive externality. This finding extends intergenerational mobility analysis beyond nuclear families to extended kinship networks, enriching scholarly understanding of mobility formation mechanisms.

4.4. Income Inequality as a Moderating Variable

Multilevel analysis covering 49 countries by Li & Zhang (2025) yields a pivotal moderating conclusion: economic growth only generates significant mobility gains in low-inequality societies. In high-inequality nations, growth's mobility-promoting effect weakens sharply and loses statistical significance. In other words, income disparity undermines or fully offsets the equalizing potential of economic expansion; elite households capture nearly all growth dividends, leaving disadvantaged youth unable to access expanded educational opportunities.

The study also documents pronounced gender and cohort heterogeneity. Women's educational mobility is more responsive to macroeconomic fluctuations than men's. During economic booms, growth and public education investment deliver larger mobility gains to women; conversely, economic downturns and rising inequality inflict heavier mobility losses on females. Younger cohorts extract greater mobility benefits from economic expansion, while older generations bear more severe mobility suppression from inequality. These results align with Yaish et al.'s (2021) U.S.-based research, which confirms women's heightened sensitivity to macroeconomic conditions.

5. Conclusion and Research Outlook

Synthesizing extant literature, scholars have reached consensus across three core domains. From a measurement standpoint, relative mobility frameworks outperform absolute mobility for cross-national and cross-temporal comparisons; yet researchers must rigorously address data truncation bias. Lee & Lee's (2020) methodological warning remains underappreciated in domestic Chinese scholarship:

neglect of measurement error risks systematically biased estimations of intergenerational educational mobility.

In terms of socioeconomic outcomes, upward educational mobility delivers tangible improvements to income distribution, consumption equality, employment prospects, public health, and social trust. Nevertheless, these benefits are unequally allocated, with young, urban, male populations capturing the largest share of gains. Meanwhile, upward mobility carries unacknowledged hidden costs: pervasive overeducation among mobile youth (Zhang Shun & Li Shiyang, 2023), gendered health-risk behaviors in specific national contexts (Gugushvili et al., 2018), and persistent lifetime income gaps between upwardly mobile women and men with privileged family backgrounds (Yaish et al., 2021). Accordingly, mobility research cannot solely emphasize positive externalities; scholars must systematically investigate its accompanying burdens.

Regarding formative drivers, macro-institutional policies, urban-rural structural divides, and multidimensional household capital jointly shape educational mobility trajectories, with income inequality functioning as the critical moderator that determines whether economic growth translates into expanded opportunities for marginalized groups. This theoretical insight unifies economic development and inequality research within a cohesive analytical framework.

Despite substantial cumulative progress, current literature bears four prominent limitations that warrant future scholarly attention.

First, insufficient research centers on mobility's hidden costs. Most existing studies prioritize the positive consequences of upward mobility, overlooking its tradeoffs. Social mobility's disembedding hypothesis has long theorized that mobile individuals face fractured social ties, identity confusion, and chronic psychological pressure. While prior work documents incidental evidence—such as elevated overeducation rates for mobile youth and higher smoking prevalence among upwardly mobile women—these negative outcomes remain secondary observations rather than dedicated research subjects. Future scholarship should frame mobility costs as an independent research agenda and systematically compare adverse mobility consequences across diverse social contexts.

Second, measurement framework integration remains incomplete. Absolute and relative mobility each possess unique applicable scenarios; yet the boundary conditions governing their joint and separate usage across distinct research questions remain underexplored. Amid China's sustained educational expansion, developing a unified measurement approach that retains absolute mobility's intuitive interpretability while eliminating credential inflation bias constitutes a key methodological challenge. Furthermore, domestic research rarely addresses the truncation bias flagged by Lee & Lee (2020), implying widespread systematic bias within existing mobility estimates.

Third, cross-national institutional mechanisms require deeper unpacking.

Comparative cross-country studies have identified income inequality's moderating role and divergent mobility patterns across institutional regimes, yet detailed analysis of how specific institutional arrangements shape educational mobility remains superficial. Open questions remain regarding how institutions, including the hukou system, social welfare frameworks, and education finance regimes, reshape mobility by altering educational resource allocation, labor market segmentation, and household educational investment decisions—topics demanding rigorous cross-national comparative analysis.

Fourth, causal identification and mechanism testing require tighter integration. Policy evaluations of educational expansion and housing reform adopt robust causal identification strategies but lack granular mediating mechanism analysis to explain policy transmission pathways. Conversely, studies examining mobility outcomes such as income, consumption, and health elaborate transmission channels but often rely on cross-sectional data with weak causal inference. Balancing rigorous causal identification and in-depth mechanism unpacking within unified empirical designs represents a core methodological frontier for subsequent research.

Future scholarship should prioritize four research avenues: cross-context comparative analysis of mobility costs, localized empirical corrections for data truncation bias, dynamic examinations of institutional transformation's reshaping effect on educational mobility patterns, and integrated systematic analysis of causal transmission mechanisms.

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