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A Review of Research on Intergenerational Education Mobility: Influencing Factors, Heterogeneity, and Prospects

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Abstract

Intergenerational educational mobility is a critical indicator for gauging the equality of educational opportunity and the level of social mobility, and is of great significance for advancing social equity and realizing common prosperity. The academic circle has produced extensive research on intergenerational educational mobility. Still, there is a shortage of papers that provide a relatively systematic review of dimensions such as influencing factors, heterogeneity, and research prospects. Accordingly, this paper presents a comprehensive overview of studies relevant to intergenerational educational mobility. Apart from explicating core concepts related to intergenerational educational mobility, it mainly introduces the latest research advances in two key areas: the factors influencing intergenerational educational mobility and its heterogeneity, and further discusses existing limitations as well as future development directions.

Keywords

Intergenerational Mobility; Intergenerational Education Mobility; Influencing Factors; Heterogeneity

1. Introduction

Common prosperity is an essential requirement of socialism with Chinese characteristics and a defining feature of Chinese modernization. Preventing the rigidity of social stratification, unblocking channels for upward mobility, and fostering a more equitable and just social environment constitute an integral part of realizing the well-rounded development of individuals and advancing common prosperity in a solid and steady manner. In the course of modern social development, education is widely recognized as a critical channel for augmenting human capital stock, narrowing income disparities, and enabling upward social mobility.

Social mobility refers to the process by which social members or social groups move

from one social status to another (Yang & Lian, 2015). It can be classified into two categories: intragenerational mobility and intergenerational mobility. The former focuses on individuals' mobility trajectory from their social origin to their current social position, while the latter examines changes in socioeconomic status between the parental and offspring generations (Li & Song, 2018). Intergenerational mobility is a core concept in both sociology and economics. In the field of economics, systematic research on intergenerational mobility was inaugurated by the groundbreaking work of Becker and Tomes (1979), who innovatively constructed a theoretical model of intergenerational transmission by integrating microeconomic decision-making and human capital investment mechanisms. In socio-economic studies, intergenerational mobility generally refers to changes in economic characteristics and social class status between the parental and the offspring generations (Fang, 2024).

Intergenerational mobility reflects shifts in socioeconomic status across parent-child generations. It reveals the fairness of social opportunities by characterizing the correlation of socioeconomic features such as income, education, and occupation between parental and offspring generations. In societies with a high level of intergenerational mobility, offspring's resources and social status are less influenced by the parental generation, and the equity of social opportunities is correspondingly higher (Lin & Zhang, 2015). Furthermore, intergenerational mobility helps safeguard social equity and justice and stimulate social vitality (Donnelly et al., 2017).

In the course of modern social development, education serves as a critical channel for upward social mobility. An individual's educational attainment generally reflects their socioeconomic status. Intergenerational educational mobility captures the extent to which parental educational attainment influences offspring educational outcomes and serves as a core indicator of equity in educational opportunities. As the most essential form of human capital, education largely determines individuals' occupational choices and income levels. Accordingly, research on intergenerational educational mobility is of particular significance within the broader field of intergenerational mobility studies, as it offers a representative perspective for assessing the overall state of social mobility in a society.

Existing research predominantly focuses on describing the current status and measurement methods of intergenerational educational mobility. Xie et al. (2022) examined intergenerational occupational and educational mobility among Chinese residents born after 1945 and compared the findings with those of the United States. The results show that the intergenerational occupational correlation coefficient in China is approximately 0.3, while the intergenerational educational correlation coefficient is approximately 0.4. Li and Huang (2020) measured the magnitude of intergenerational mobility through a probability transition matrix and concluded that China's intergenerational educational mobility has remained generally stable

with a slight upward trend.

Against this backdrop, this paper reviews the literature on intergenerational educational mobility. It first elaborates on the factors influencing such mobility, then analyzes its heterogeneity, and finally discusses the limitations and future prospects of existing research.

2. Influencing Factors

As a key indicator reflecting social equity and equality of opportunity, intergenerational educational mobility, along with its influencing mechanisms and factors, has long been a core focus of academic research. Existing studies indicate that intergenerational educational mobility is shaped by the interactive effects of multidimensional factors, which can be summarized into three categories: family background, public education policies, and socioeconomic environment.

2.1. Family Background

Scholars both at home and abroad agree on the impact of family background on intergenerational educational mobility. Studies by numerous scholars, including Choi et al. (2020), Pan et al. (2022), and Ahsan et al. (2022), reveal a pronounced intergenerational transmission of education between the parental and offspring generations, meaning that factors such as parental social status, income level, and occupational type significantly affect the final educational attainment of offspring. Offspring from advantaged family backgrounds typically have access to more sufficient family educational investment, while those from disadvantaged family backgrounds are constrained by inadequate family educational investment. From the perspective of household human capital investment decision-making, Zou and Zheng (2014) noted that the risk premium of education, opportunity costs, and uncertainty surrounding future returns are critical factors shaping household educational investment decisions, and that parental decision-making on family educational investment is often constrained by available family educational resources. Building on existing research, Liu and Si (2017) argued from the perspective of offspring sibling size that the number of siblings reduces the likelihood of upward mobility by shortening individuals' years of schooling.

The intergenerational transmission of education, which stems from the impact of family background on offspring's human capital accumulation, is evidently detrimental to intergenerational social mobility in education and further exacerbates social class rigidity (Zou et al., 2019). How can the persistent rigidity effect of intergenerational educational transmission be broken to promote intergenerational educational mobility? According to research by Zhou et al. (2024), China's housing marketization reform, launched in 1998 and designed to end the practice of securing housing through parental educational attainment and occupational advantages, has facilitated intergenerational educational mobility

among urban residents. However, the rise in housing prices driven by the reform has worked against offspring from middle- and lower-stratum urban households, making it harder for them to access high-quality educational resources through parental housing purchases. Accordingly, the strong intergenerational transmission of education makes it difficult for offspring from middle- and lower-strata families to achieve upward social mobility through education. Establishing a balanced educational development system and increasing investment in public educational resources serve as important measures to alleviate educational class rigidity caused by disparities in family background (Zhao & Gao, 2016).

2.2. Public Education Policies

By regulating the allocation of public educational resources, public education policies serve as an important external environmental factor affecting intergenerational educational mobility. Overseas literature has examined the impact of public education reforms on intergenerational educational mobility, finding that such reforms generally enhance equity in educational opportunities and boost intergenerational educational mobility. For instance, Iannelli (2011) analyzed Scotland's educational expansion policy and found that although class-based educational disparities persisted after the policy's implementation, the likelihood of upward mobility increased for children from lower-strata households. Kotera and Seshadri (2017) argued that basic education funding programs in the United States help improve intergenerational educational mobility. However, Rogne and Frisli (2025) found that the large-scale educational expansion reform in Norway from 1969 to 1993, which involved the construction of new local colleges and the upgrading of vocational schools, significantly increased the national higher education enrollment rate (especially among women). However, it did not promote local intergenerational educational mobility, nor did it reduce educational inequality stemming from family background. The main reason is that, in Norway's institutional context of high welfare, low education costs, and a well-developed student support system, the distance to schools is not a key barrier preventing disadvantaged groups from accessing higher education. Intergenerational inequality is more due to differences in early family upbringing, cognitive abilities, and cultural capital, rather than the geographical accessibility of higher education.

A small body of literature treats the 1986 implementation of the Compulsory Education Law as an exogenous shock to examine the impact of related legislation and education policies on intergenerational educational mobility. Guo et al. (2019) found that the implementation of the law did not significantly improve intergenerational educational mobility in either urban or rural households. By contrast, Chen et al. (2021) argued that the enactment of the Compulsory Education Law has significantly enhanced intergenerational educational mobility in Chinese society.

In addition to the implementation of the Compulsory Education Law, the subsequent free compulsory education policy has also attracted scholarly attention regarding its potential impact on intergenerational educational mobility. Many scholars have examined the policy's effects on multiple aspects, including enrollment rates at the compulsory education stage, human capital accumulation, and occupational choices. The free compulsory education policy has not only reduced educational expenses for children from rural households and raised enrollment rates at the compulsory education stage (Xiao et al., 2017), but also significantly lowered the probability of premature labor market entry among rural children, thereby enabling them to receive more education (Tang et al., 2020). However, since urban and rural enrollment rates at the compulsory education stage were already high prior to the policy's implementation, the policy has exerted only a minimal promotional effect on such enrollment rates (Chyi & Zhou, 2014; Shi, 2016). In the long run, the implementation of the free compulsory education policy not only facilitates access to education at the senior high school level and above for children from rural households but also improves individuals' cognitive and non-cognitive abilities and health status (Jia & Ke, 2020). As a result, it increases opportunities for rural residents to obtain formal employment and adequate employment security (Zhu & Cai, 2019). Lin (2021) examined the impact of the free compulsory education policy on the urban-rural educational gap, finding that the policy has narrowed this gap and exerts a more pronounced effect on narrowing the urban-rural educational gap in China's western region.

As for whether public education policies at the higher-education stage can likewise promote intergenerational educational mobility, some scholars contend that higher education fails to do so. The rationale is that higher education is not a universal form of education, with only a small fraction of the population able to access it. Furthermore, newly created educational opportunities are typically captured by advantaged social strata, further exacerbating educational inequality between urban and rural areas and across different social strata (Guo et al., 2019). In research on China's higher education expansion policy implemented in 1999, Luo and Liu (2018) argued that the policy exerts a promotional effect on intergenerational upward mobility among households with advantaged family backgrounds and in more developed regions, whereas it has a relatively limited facilitating effect on such mobility for households from lower social strata and in less economically developed areas, including rural regions. Nevertheless, some scholars argue that China's higher education expansion policy has narrowed disparities in higher education access among students from different social classes and improved intergenerational educational mobility (Sun & Wang, 2023). Duan et al. (2022) noted that following the higher education expansion policy, higher education appears to have shifted from facilitating social mobility to reinforcing intergenerational persistence in urban areas. Xu et al. (2024) found that higher education expansion exerts no

significant effect on reducing inequality in higher education opportunities. On the contrary, the rapid expansion of higher education has weakened the signaling function of educational credentials as a proxy for ability and diminished the role of education in helping individuals secure better job opportunities. As a result, the expansion of higher education may negatively affect upward social mobility across social strata.

Domestic studies have also examined the impact of government public expenditure and fiscal transfer payments on intergenerational mobility. For example, Zhou and Su (2012) found that increasing county-level education expenditure can raise intergenerational income mobility and significantly affect the equality of social opportunities. Using data on municipal basic education expenditure, Li and Zhou (2015) found that increasing basic education expenditure can alleviate insufficient human capital investment in offspring among poor households due to borrowing constraints and improve intergenerational mobility in both income and education. Song and He (2018) found that increasing fiscal expenditure at the compulsory education stage can compensate for insufficient human capital investment in low-income households, mitigate the impact of inequality in initial household endowments on individual income, and thereby improve intergenerational mobility. Fan (2020) examined the impact of fiscal transfer payments on intergenerational educational mobility and found that education-related transfer payments can effectively enhance such mobility.

2.3. Socio-Economic Environment

Intergenerational educational mobility is deeply rooted in the broader socioeconomic context, and changes in macro-level socioeconomic factors profoundly influence intergenerational mobility patterns. Existing studies indicate that economic development is generally accompanied by increased educational investment and the expansion of the education system, thereby boosting absolute educational mobility (Dos Santos Fraga et al., 2022). However, the theoretical analysis of Becker and Tomes (1979) noted that rapid economic growth may also widen income disparities, exacerbate social polarization, solidify class structure, and reduce relative mobility. The functioning of the labor market is directly linked to the returns and incentives of educational investment. Xing (2006) found that labor market demand for different educational levels, the economic returns to education, and the degree of market segmentation all affect individuals' willingness to invest in education and the efficiency with which educational attainment translates into socioeconomic status. Where severe discrimination or segmentation prevails, even individuals with high educational attainment may find it difficult to achieve expected upward mobility (Zheng et al., 2020). In recent years, the rapid rise of the digital economy has emerged as an emerging macro-level force reshaping intergenerational mobility. From the perspective of digital finance, Zhou and Ding (2023) found that the

development of digital finance can alleviate household liquidity constraints, improve household human capital investment and intergenerational educational mobility, thereby promoting intergenerational income mobility. This positive effect is particularly pronounced among households with low human and social capital, reflecting its inclusive nature. Qi et al. (2025) further focused on intergenerational educational mobility and confirmed that the development of digital finance significantly reduces intergenerational educational elasticity. Its core mechanisms lie in alleviating household credit constraints and improving human capital investment in offspring, while generating positive effects, including opportunity gains, opportunity sharing, and the narrowing of the digital divide. In addition, opening up, especially the introduction of foreign capital, has also been proven to be an important macro-level factor affecting intergenerational educational mobility. Research by Huang et al. (2024) found that the introduction of foreign capital can significantly weaken the stickiness of intergenerational educational transmission between fathers and sons and enhance intergenerational educational mobility. To sum up, the in-depth development of the digital economy and digital finance, alongside the continuous deepening of opening-up, have become important macro socioeconomic factors that promote intergenerational educational mobility and reduce inequality in development opportunities. They exert their effects through multiple channels, such as alleviating resource constraints, optimizing income structure, and improving family educational participation.

3. Research on the Heterogeneity of Intergenerational Educational Mobility

3.1. Research on Regional Variations in Intergenerational Educational Mobility

Intergenerational educational mobility varies across regions. Raza and Aytun (2021) and Roy et al. (2024) noted that, generally speaking, the higher the level of economic development, the greater the intergenerational educational mobility and the greater the equity in educational opportunities. Research by Hertz et al. (2008) found that the global intergenerational educational mobility coefficient is approximately 0.4, with developed countries—such as those in Northern Europe—exhibiting higher levels of intergenerational educational mobility than developing countries, such as those in Latin America. Using data from the China Family Panel Study, Lü et al. (2020) estimated that the absolute intergenerational educational mobility index for urban areas in China ranged from 8.75 to 19.27, reflecting significant regional variations in intergenerational educational mobility across the country. Studies by Zou and Ma (2019) and Hu (2022) both indicated that educational intergenerational mobility varies across provinces and cities in China; these differences are similarly characterized by higher mobility in provinces (and cities) with higher levels of economic.

Some scholars contend that the uneven allocation of resources and inequality in social status between urban and rural areas and across regions, driven by China's urban-rural dual household registration system, are the primary causes of regional disparities in intergenerational educational mobility in China (Wang et al., 2019; Gao et al., 2021). The spatial rigidity effect inherent in the household registration system hinders offspring in less educationally developed regions from accessing high-quality educational resources, whereas population mobility can mitigate this dilemma (Zhang et al., 2022; Ahsan et al., 2022). With the expansion of the migrant population and the continuous reform and improvement of the household registration system, major cities across China have gradually introduced education access policies, including compulsory education enrollment schemes for migrant children and cross-regional participation policies for senior high school and college entrance examinations. These policies have expanded educational opportunities for migrant children in their destination cities and improved the quality of education they receive, thereby alleviating, to some extent, the rigidity of intergenerational educational transmission caused by the urban-rural dual household registration system (Li et al., 2018; Sieg et al., 2023).

3.2. Research on Urban–rural Disparities in Intergenerational Educational Mobility

Regarding urban-rural disparities in China, the urban-rural dual structure has created a substantial opportunity gap in education s. Research by Fang and Xia (2025) demonstrated that the urban-rural dual structure is the core driver of the urban-rural gap in upward intergenerational educational mobility, where the urban exposure effect and urban-rural grouping effect work in tandem. Moreover, this disparity is gradually transitioning from being rooted in external environmental differences to being shaped by disparities in individual ability endowments. Xu and Yu (2025) similarly found that when parental siblings achieve upward intergenerational educational mobility, they generate positive spillovers through three pathways: improving the educational concepts and parenting efficiency of less-educated parents, increasing household educational investment, and raising children's educational aspirations. These spillovers significantly boost the probability of educational advancement for the younger generation, yet the spillover effect exhibits a notable urban-rural disparity, with a stronger effect in urban areas than in rural areas. Wu et al. (2023) also confirmed that the impact of education on intergenerational mobility varies by household registration status. Such disparities are closely associated with the uneven allocation of educational resources between urban and rural areas and the household registration system that restricts population mobility.

3.3. Research on Gender Differences in Intergenerational Educational Mobility

Findings regarding gender differences vary. Hossain and Beretta (2025), in their study of countries at different income levels using IPUMS census data, found that gender differences in educational mobility are to some extent linked to a country's level of economic development: in low- and middle-income countries, the increase in educational mobility among women is greater than that among men, whereas in high-income countries, women's overall mobility has already surpassed that of men. Leone (2021), using data from the 2014 Brazilian National Household Sample Survey (PNAD-2014), found that educational intergenerational mobility among daughters in Brazil is significantly higher than among sons; women are more likely to overcome the constraints of their family's educational background and gain access to higher education.

Regarding research on gender differences in intergenerational educational mobility in China, Gong and Liao (2024) found that intergenerational educational mobility in China has markedly increased and gender disparities are gradually narrowing; however, men's advantage in the upward transmission of educational attainment remains significant. Similarly, Huo (2021) pointed out that women tend to be trapped in the 'bottom persistence' of low-education families, whilst men tend to maintain the 'top persistence' of high-education families; that is, female offspring from lower-class backgrounds find it difficult to achieve upward social mobility through education, whereas male offspring born into high-education families are more likely to retain their privileged status. Although women are gaining greater educational advantages, mechanisms of inequality persist.

It should be noted that, whilst the gender gap in intergenerational educational mobility is narrowing and the positive impact of educational expansion is more pronounced for women than for men, increased mobility does not signify that class barriers have been broken down. Although pathways for upward mobility have widened for women at the bottom, the advantages enjoyed by men at the top remain significant.

4. Limitations and Prospects

(1) Constructing a Systematic Theoretical Analytical Framework Grounded in the Chinese Context

The theoretical foundations of current research on intergenerational educational mobility largely originate in the West, including Blau-Duncan status attained model, Becker's human capital theory, Raftery and Hout's Maximally Maintained Inequality (MMI) theory, and Lucas's Effectively Maintained Inequality (EMI) theory. These theories are rooted in the social structures and institutional environments of Western countries and are inevitably ill-suited to explaining issues specific to China. In recent years, scholars have attempted to incorporate variables such as the household registration system, the expansion of higher education, and the development of digital finance into their analyses, achieving beneficial progress.

However, these theoretical innovations remain relatively fragmented; they have not yet formed a systematic framework or achieved a broad consensus within the academic community. Future research should systematically examine the evolutionary logic of Western research on intergenerational mobility. Building upon a critical engagement with these theories, it should focus on China's unique context—including its urban-rural dichotomy, regional development disparities, and large-scale policy interventions—and strive to distil and construct a local theoretical framework capable of explaining the phenomenon of intergenerational educational mobility in China, thereby providing a more robust logical starting point for empirical research.

(2) Strengthening data management and maintenance, and refining research subjects and populations

High-quality microdata form the foundation for research into intergenerational educational mobility. However, compared with Western countries, China's relevant survey data began relatively late and are generally characterized by short tracking periods, limited intergenerational matching information, and poor data continuity and accuracy. These issues have, to a large extent, constrained the advancement of research on intergenerational mobility. For example, retrospective information on the father's early education and occupational history often contains significant measurement errors, which may also lead to biases in model estimates. Consequently, the development and refinement of databases are urgent matters. Future improvements could be made in the following areas: firstly, expanding the statistical population and the range of indicators within the database, and increasing the collection of process-related variables such as the family education process and cognitive and non-cognitive abilities; secondly, strengthening the long-term maintenance of longitudinal surveys to improve sample matching and data quality; thirdly, whilst ensuring data security, encouraging government departments and enterprises to make data available to an appropriate extent, thereby providing richer and more reliable data support for academic research, enabling researchers to conduct in-depth analyses of more finely segmented groups and over longer time spans.

(3) Expanding interdisciplinary research perspectives and approaching the scientific innovation of research conclusions with caution

Research into intergenerational educational mobility spans multiple disciplines, including economics, sociology, and education. However, traditional studies have largely been confined to single-discipline frameworks, predominantly economics and sociology. This approach is inconsistent with the philosophy of interdisciplinary integration and fails to fully reveal the underlying logic of intergenerational transmission through education. Therefore, incorporating methodologies or perspectives from other disciplines into research will help to better understand the complex phenomenon of intergenerational educational mobility and avoid a

mechanistic view of the issue.

At the same time, as mentioned earlier, there is an inconsistency in research findings on intergenerational educational mobility. On core issues such as the policy effects of the Compulsory Education Law and the directional impact of higher education expansion on intergenerational mobility, different scholars have reached diametrically opposed conclusions based on differing data or methodologies. This inconsistency often renders the policy recommendations derived from such research of limited practical guidance. Given this characteristic, researchers should consistently scrutinize their own research designs with a critical eye throughout the research process. When employing methods such as the intergenerational elasticity coefficient, instrumental variables, and difference-in-differences, they must thoroughly test the sensitivity of their conclusions to model specifications, variable measurements, and sample selection; when proposing policy recommendations, they must maintain a scientific attitude and avoid treating research findings under specific conditions as universal laws. Only by adhering to a scientific and rigorous approach, drawing conclusions with caution, and applying them in practice can research on intergenerational educational mobility truly serve the practical objectives of promoting equity in educational opportunities and facilitating social mobility.

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