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Educational and Income Mobility in Mexico: Early Gains, Recent Setbacks

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Educational and Income Mobility in Mexico: Early Gains, Recent Setbacks[1]

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This paper examines intergenerational social mobility in Mexico, a key determinant of both equity and economic development. Using new data from the ESRU-EMOVI 2023 survey and harmonized national household surveys from eight Latin American countries, we estimate educational and income mobility to provide a comprehensive picture of mobility patterns. While Mexico has made strides in reducing income inequality and expanding access to education, our findings reveal that income mobility remains stagnant and educational mobility has recently declined. We observe regional convergence in educational mobility, but persistent gaps in income mobility and limited progress relative to other Latin American countries. Within Mexico, gender differences in mobility are small, but significant regional disparities persist. Our cross-country comparisons show that Mexico's relative position in mobility rankings has deteriorated over time. These findings highlight the need for targeted policies that address structural barriers to upward mobility and promote more inclusive growth.

Keywords: intergenerational mobility, Mexico, education, incomes

JEL Classification: D63, J62, O15

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1. Introduction

Social mobility is a keystone of both social equity and economic development, measuring the extent to which an individual's socioeconomic status can diverge from that of their parents. When mobility is high, it indicates that personal efforts and abilities play a greater role in determining economic outcomes, while in contexts with limited mobility, inequality tends to persist across generations, perpetuating poverty traps and limiting access to education and employment opportunities for disadvantaged groups. Increasing social mobility, therefore, supports a more inclusive development process by fostering talent and therefore significantly contributes to economic growth (Hsieh *et al*., 2019; Neidhöfer *et al*., 2024). This dual role of social mobility as both a driver of equity and efficiency is particularly relevant in developing contexts like Mexico.

In recent decades, Mexico has made considerable improvements in terms of access to education and reducing income inequality. For instance, the percentage of individuals with completed secondary education rose from nearly 20 % to 40 %, and the Gini coefficient of household per capita disposable incomes dropped from 53.3 to 43.5 between 1992 and 2022 (SEDLAC, 2024). However, these advancements have not fully translated into sustained reductions in inequality of opportunity or significant improvements in social mobility, as structural challenges remain deeply embedded in the country. Persistent issues such as regional disparities, limited access to quality education, and high levels of informal employment hinder upward mobility for many individuals, especially those from disadvantaged backgrounds. Thus, understanding the dynamics of social mobility in Mexico is crucial for identifying pathways to equitable growth and evaluating current policies.

This report aims to provide new insights into intergenerational mobility in Mexico by comparing it with eight other Latin American countries. We estimate intergenerational mobility

along two key dimensions: education and income. By examining both educational and income mobility, we offer a more comprehensive view of how educational achievements translate into income gains and improvements in quality of life. This approach sheds light on whether the progress in educational access has successfully facilitated upward mobility or whether economic inequalities remain unmitigated. Understanding these patterns is essential for policymakers seeking to design interventions that ensure equitable access to opportunities and improve the effectiveness of current policies addressing social and economic inequalities.

Our study draws on two main data sources: the ESRU Survey on Social Mobility in Mexico 2023 (ESRU-EMOVI 2023) and other official national household surveys (NHS) from eight Latin American countries. These surveys' unique design allows us to avoid co-residency biases by exploiting retrospective questions about parents' education. These questions capture socioeconomic background independently of household structures, such as co-residency between parents and children, providing a more accurate estimate of social mobility (Emran *et al*., 2018; Emran & Shilpi, 2021). The NHS data is processed following the protocols of the Socioeconomic Database for Latin America and the Caribbean (SEDLAC), a joint initiative between CEDLAS at the Universidad Nacional de La Plata and the World Bank. This standardized processing is critical given the inherent inconsistencies in household surveys across Latin American countries and even within individual countries over time. By adhering to standardized variable definitions and applying consistent data processing methods, we ensure the comparability of statistics across countries and over time, enabling robust cross-country comparisons for various socioeconomic indicators (SEDLAC, 2024).

In addition to cross-country comparisons, the analysis also explores heterogeneities within Mexico, exploring intergenerational mobility trends across different regions, cohorts, and gender using ESRU-EMOVI 2023. The regional representativeness of ESRU-EMOVI 2023 enables a

detailed examination of Mexico's varied socio-economic landscape, offering insights into how mobility dynamics differ across regions and whether certain areas face greater challenges in achieving upward mobility.

Our results show that in Mexico, educational mobility first improved but then either stagnated or even declined. We observe a degree of convergence across regions, with initial mobility improvements most pronounced in areas like the Central and Southern regions, which began with lower levels of mobility. However, income mobility overall remains stagnant in Mexico, with less convergence between regions than for educational mobility. Furthermore, the analysis suggests relatively small variation in mobility outcomes between men and women across Mexico. When comparing Mexico to other Latin American countries, we find that Mexico's position in the mobility rankings has worsened over time. While educational mobility improved across the region, progress in Mexico has been slower. Furthermore, in the context of limited advancement in income mobility indicators across Latin America (Neidhöfer *et al*., 2022; Ciaschi *et al*., 2023), Mexico ranks among the worst-performing countries in this regard.

The rest of this document is organized as follows. Section 2 examines national and regional trends in intergenerational social mobility in Mexico. Section 3 compares Mexico's performance with that of other Latin American countries. Section 4 explores gender disparities in mobility within Mexico. Section 5 analyzes the relationship between social mobility and economic inequality in the country. Finally, Section 6 provides concluding remarks.

2. Social mobility in Mexico

This section analyzes intergenerational social mobility in Mexico, focusing on educational and income mobility and examining regional differences across five subregions. Mobility is measured using the slope coefficient of a regression between parents' education and either their children's education or income rank. Higher values indicate stronger intergenerational persistence, and thus, lower mobility. For a more detailed discussion of these methods, please refer to Appendix A. Here, we explore both the levels and trends of mobility across cohorts, emphasizing shifts from earlier to more recent generations.

Figure 1 illustrates the regional variation in average educational mobility across Mexico.[5] On the map, a higher persistence between parents' and children's education is indicated by darker shades. The map reveals a distinct north-south divide in educational mobility across Mexico.[6] Northern regions, particularly the Northwest, exhibit lower educational persistence compared to the South. Specifically, the Northwest has an average coefficient of 0.35, which is 17 % below the national average persistence coefficient of 0.42. In contrast, the South has an average coefficient of 0.44, approximately 5.7 % above the national average. These findings are consistent with the CEEY Atlas, emphasizing that northern Mexico generally provides more opportunities for upward educational mobility than the southern regions.

[5] Regions were computed following the Centro de Estudios Espinosa Yglesias (CEEY) classification. "North" includes Baja California, Sonora, Chihuahua, Coahuila, Nuevo León, and Tamaulipas federal entities; "Northwestern" includes Baja California Sur, Sinaloa, Nayarit, Durango, and Zacatecas; "North-Central" comprisess Jalisco, Aguascalientes, Colima, Michoacán, and San Luis Potosí; "Central" includes Guanajuato, Querétaro, Hidalgo, Estado de México, Ciudad de México, Morelos, Tlaxcala, and Puebla; and "South" comprises Guerrero, Oaxaca, Chiapas, Veracruz, Tabasco, Campeche, Yucatán, and Quintana Roo.

[6] Table C1 in Appendix C shows the estimates for Mexico and each sub-region, across four birth cohort groups.

Figure 1. Intergenerational education persistence in Mexico

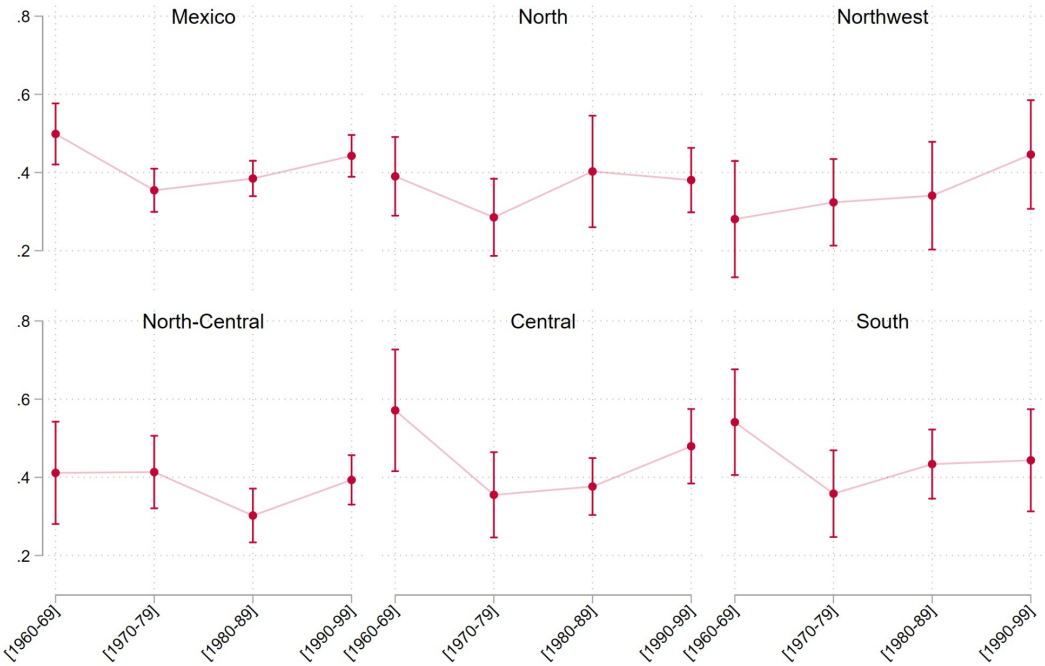
Notes: the figure shows the average intergenerational persistence coefficient across all cohorts, where higher values (darker blue) indicate a higher persistence and, hence, lower intergenerational mobility.
Source: ESRU-EMOVI 2023, own estimations.

Figure 2 presents trends in the intergenerational persistence of education across generations in Mexico. At the national level, educational mobility has improved, with the persistence coefficient decreasing from an estimated 0.5 for cohorts born in the 1960s to 0.44 for those born in the 1990s, reflecting an 11 % reduction in persistence. This indicates a general trend toward increased mobility, though this improvement is mainly driven by a sharp decline between the 1960s and 1970s cohorts, followed by a slowing rate of progress—or even reversal—for cohorts born since the 1980s.

Examining regional differences, we find that the relatively high-mobility regions in the North and North-Center have seen minimal change, with the Northwest even showing a decline in mobility across generations. In contrast, the Center and South—historically lower-mobility regions—showed significant improvements in older cohorts, though progress largely stabilized after 1980, which has driven the national pattern. These regional trends have contributed to a convergence of intergenerational mobility levels across Mexico over time.

Turning to income mobility, Figures A1 and A2 in the appendix present similar regional analyses, but using income percentiles (rank) of children as the outcome variable. In these figures, we regress parents' education on children's income rank to measure intergenerational income persistence. Figure A1, like Figure 1, highlights regional variations in income mobility. While we do not observe the same clear north-south divide as with educational mobility, regional differences still emerge. The national average for Mexico is 1.69, which means that one year of parental education is associated with a difference of almost two percentile ranks on the income distribution. Regional averages range from 1.17 in the Northwest to 2.06 in the North. The Center and Northwest regions show higher income mobility compared to the northern regions and the South. In fact, the North exhibits the least mobility, while the Center and South regions display more moderate but still notable income mobility.

Figure 2. Intergenerational education persistence trends in Mexico



Notes: the figure shows the average intergenerational persistence coefficient for all cohorts.
Source: ESRU-EMOVI 2023, own estimates.

Figure A2 in the appendix tracks trends in intergenerational income mobility over time. Overall, income mobility in Mexico has remained relatively stagnant, with only slight improvements observed in the South and a modest decline in the Northwest. While we still observe some regional convergence, it is less pronounced than in the past. The North and Northwest regions, starting from lower mobility levels, show small increases, while the South sees improvements in recent cohorts. The Center, however, exhibits a more notable increase in mobility. These trends align with the broader pattern of regional convergence in income mobility across the country, and are in line with the findings of Toro (2022), who shows that entrants to Mexico's workforce since the 1970s have experienced a decline in occupational status, with the most significant declines occurring among the 1996-2000 cohort.

It is important to note that in our analysis, we use the region of residence rather than the region of birth to categorize individuals. This distinction has minimal impact on the findings, as only 14.8 % of individuals in the ESRU-EMOVI 2023 dataset are migrants. Furthermore, when we include an interaction between migrant status and parental education in the estimated model, the associated coefficient is not statistically significant. This suggests that using the region of residence is a valid approach for capturing regional trends in intergenerational mobility.

3. Regional comparisons between Mexico and Latin America

In this section, we compare Mexico's performance in intergenerational mobility to that of other Latin American countries, focusing on both educational and income mobility. Figure 3 provides a regional comparison using a dot graph to illustrate the distribution of intergenerational persistence of education for each country and its regions. The graph compares two birth cohorts:

1960-1969 (Subfigure A) and 1980-1989 (Subfigure B).[7] Each point on the graph represents a region within a given country, with the red dot indicating the national estimate, and higher rankings correspond to lower mobility.

Mexico has seen a decline in its position in the rankings, as its improvements have been less pronounced compared to other countries in the region. This decline signals a concerning trend. However, there is also a positive aspect: Mexico's national intergenerational mobility level remains above the Latin American average, and there is evidence of convergence between regions within the country, reflecting a broader trend across Latin America where regional disparities are narrowing.

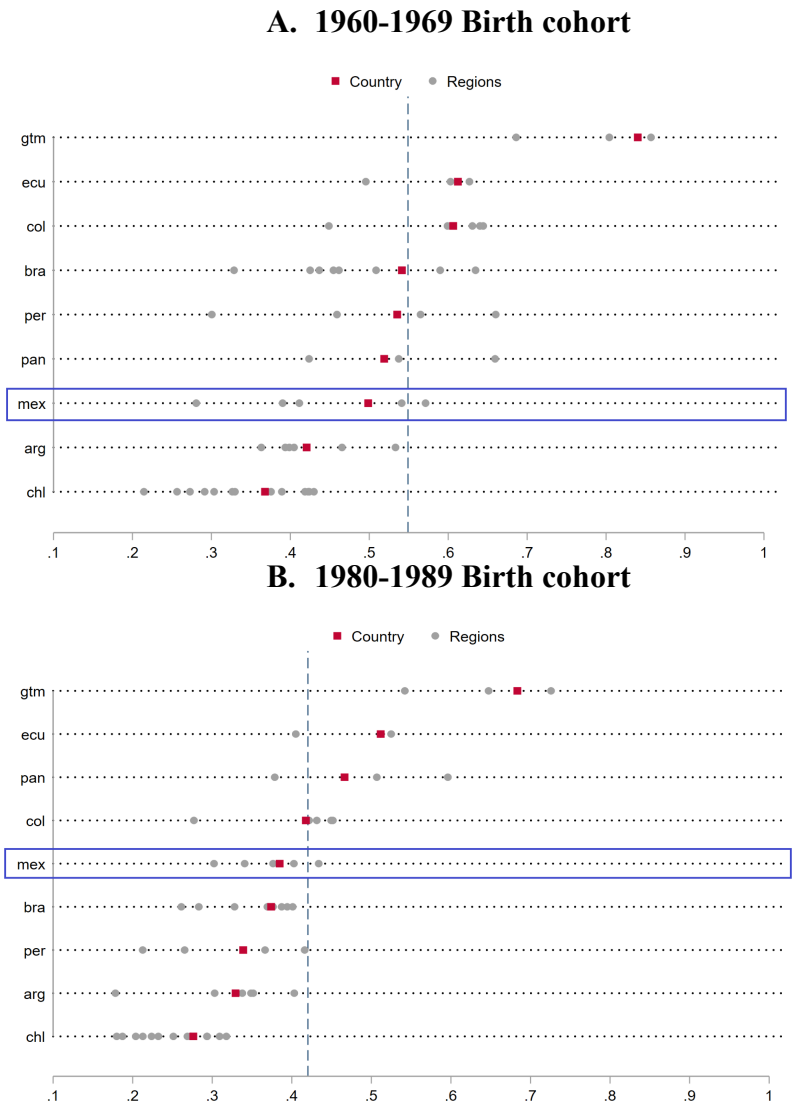
When we look at intergenerational income mobility, we can see that Mexico continues to rank among the most mobile countries in the region, even though its performance has not improved significantly. However, other countries in the region have also shown only minimal improvements in this measure of income mobility (Neidhöfer *et al*., 2022; Ciaschi *et al*., 2023). Nonetheless, the trend of convergence between regions within Mexico is still observable, though somewhat less pronounced than in education.

Figure 4 further explores regional mobility trends over time by showing three maps of Latin America depicting the intergenerational mobility coefficient for the 1960s, 1970s, and 1980s cohorts. As in Figure 3, darker areas in the maps represent lower mobility. In terms of educational mobility, the maps show a clearer pattern of improvement across the region, with Mexico following this trend. Specifically, we see improvements in the southern parts of Mexico, indicating the narrowing of regional disparities in educational mobility. In contrast, when we look at income

[7] We do not include comparisons with previous cohorts because they are not available in the ESRU-EMOVI 2023 dataset, and we do not include the 1990s birth cohort because it is not available in our dataset for the other countries in Latin America.

mobility, the maps do not show as much improvement. The lack of a more noticeable change raises questions about the progress in social mobility across the region. In Mexico, some regions, especially in the Center, show a decline in income mobility, even as the southern regions improve. While there is still some convergence (with the initial high-performing regions showing less mobility over time), the lack of widespread improvement in income mobility is a concern.

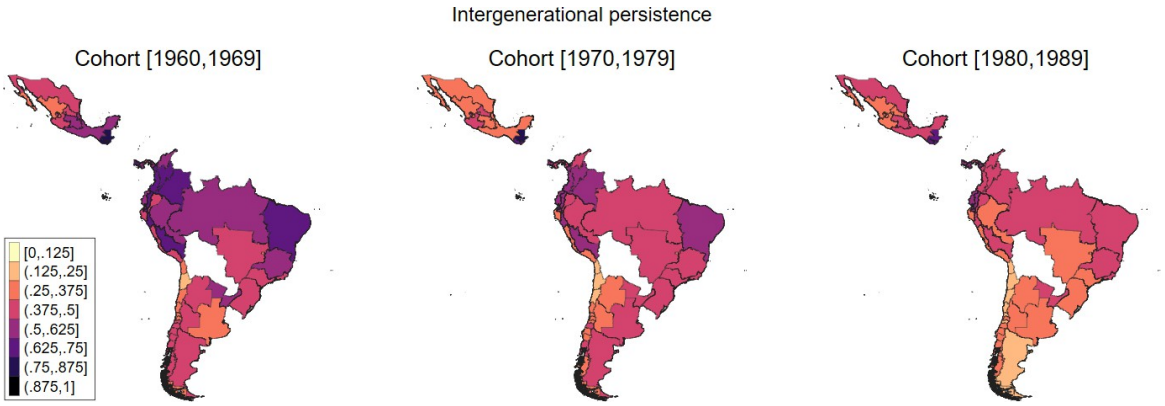
Figure 3. Regional comparison between Mexico and Latin American countries



Notes: estimates of the intergenerational persistence coefficient. The vertical dashed line corresponds to the Latin American average. Red dots represent national estimates, while gray dots represent regional estimates.
Source: ESRU-EMOVI 2023 for Mexico, and National Household Survey 1994-2015, own estimates.

To summarize, Mexico's performance in comparison to other Latin American countries reveals a mixed picture. In terms of educational mobility, the country has improved over time but at a slower pace than other countries, with some positive convergence between regions. However, in terms of income mobility, Mexico has stagnated, showing little progress compared to other countries in the region. While regional disparities in Mexico have narrowed in both education and income mobility, the lack of clear progress in income mobility remains an important issue to consider.

Figure 4. Geographical distribution of intergenerational mobility in Latin America



Notes: estimates of the intergenerational persistence coefficient.
Source: ESRU-EMOVI 2023 for Mexico, and National Household Survey 1994-2015, own estimates.

4. Gender disparities in intergenerational mobility

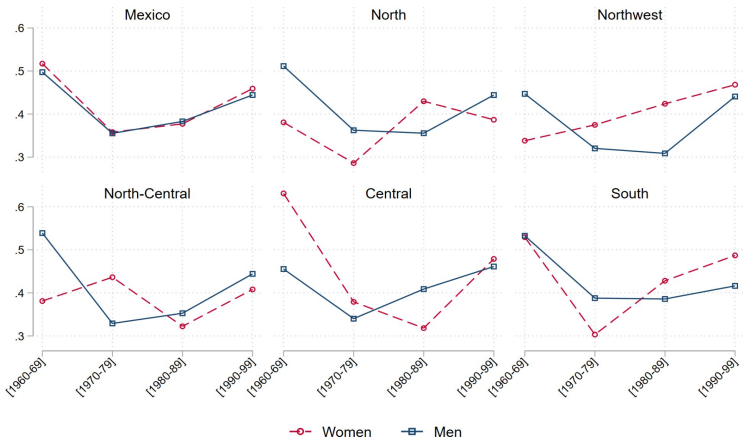
In this section, we assess whether intergenerational mobility estimates vary between men and women across Mexican regions. The estimations show the relationships between the highest educational attainment among mother and father and their children, using separate samples by children's gender. This represents a common procedure in the intergenerational mobility literature.

For instance, Neidhöfer *et al*. (2018) shows no considerable differences for father-son and mother-daughter pairs in Latin America at a national level.

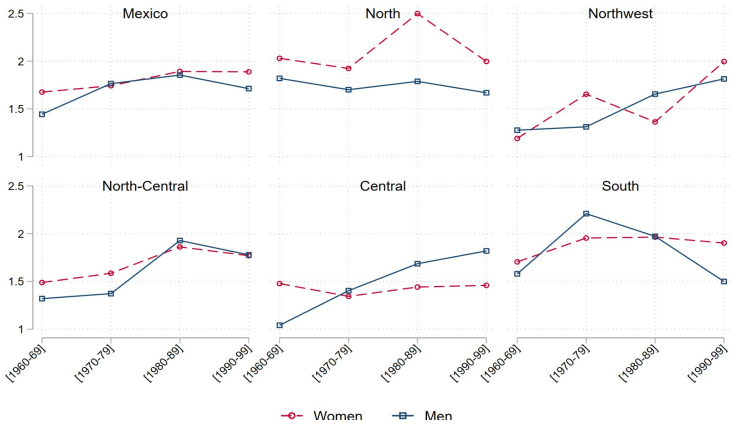
Figure 5 summarizes these results, displaying the intergenerational persistence indicator for both children's years of education and income ranks. The results indicate that gender differences in intergenerational mobility are minimal. Both genders follow similar trends, particularly at the national level; however, intergenerational mobility appears to be slightly lower for women when considering income as the outcome variable. A similar pattern is observed within each region, where trends generally align with those for the overall population, though with somewhat lower performance for women in Northern regions.

Figure 5. Gender comparison of intergenerational mobility in Mexico

A. Education



B. Incomes



Notes: intergenerational persistence coefficient.
Source: ESRU-EMOVI 2023.

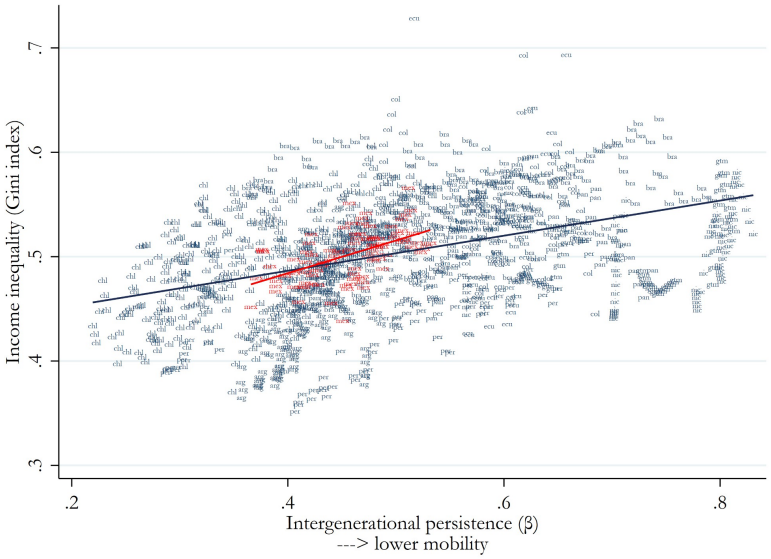
5. Social mobility and economic inequality

In a final analysis, we explore the relationship between social mobility and income inequality, a connection of particular interest to both researchers and policymakers. Available evidence suggests that countries with high income inequality tend to have lower levels of intergenerational mobility—a concept widely recognized through the famous "Great Gatsby Curve" (Corak, 2013). The primary mechanism believed to drive this relationship is unequal investment in human capital. As parents allocate a portion of their income toward investments in their children's human capital, higher income inequality results in greater disparities in parental investment and, hence, lower intergenerational mobility (Neidhöfer, 2019). However, also low intergenerational mobility is believed to lead to higher levels of income inequality in the future because of the stratification of society and lack of opportunities for improvement of disadvantaged individuals (Neidhöfer *et al*., 2024). Since data on income inequality is mostly available from the 1990s onwards, we dedicate here to this side of the relationship; namely how the degree of

intergenerational mobility of cohorts is associated with income inequality in the years when these cohorts are on the labor market.

To make intergenerational mobility estimates, which vary across cohorts, comparable with annual income inequality measures (using the Gini index of disposable household income per capita computed by region using SEDLAC (2024) microdata), we use the cohort-weighting approach developed by Neidhöfer *et al*. (2024). The approach generates yearly level estimates of intergenerational mobility by adjusting each cohort's mobility estimates based on their labor force participation in each year.

Figure 6. Great Gatsby Curve in Latin America



Notes: intergenerational persistence coefficient and Gini Index from per capita household disposable incomes.
Source: ESRU-EMOVI 2023 and household surveys.

Figure 6 presents this analysis, with each point on the graph representing a region within 10 Latin American countries. The findings align with the hypothesis that regions with lower social mobility tend to experience greater income inequality in the future. In Mexico, this relationship appears particularly strong.

6. Conclusions

Social mobility is essential for both social fairness and economic progress. Greater social mobility promotes more inclusive development by unlocking talent and by contributing to economic growth. This dual function—as a driver of both equity and efficiency—is particularly pertinent in developing economies like Mexico.

While Mexico has made notable strides in expanding access to education and reducing income inequality in recent decades, these improvements have not fully translated into marked gains in social mobility, which still shows significant regional disparities. Our findings using the ESRU-EMOVI 2023 survey for Mexico and nationally representative household surveys from eight other Latin American countries indicate that intergenerational mobility of education in Mexico improved for people born up to the 1970s but then either stagnated or declined, with some regional convergence across Mexico. Income mobility, however, has remained largely unchanged nationwide. While educational mobility has advanced throughout Latin America, Mexico's progress has been comparatively slower. Regarding gender, the results suggest minimal differences in mobility outcomes between men and women. Additionally, we found that the connection between lower social mobility and increased future income inequality is especially pronounced in Mexico, underscoring potential obstacles to future economic equity.

Recent studies reveal that enhancing opportunities for disadvantaged groups generates positive economic returns, illustrating that promoting social mobility does not entail an equity-efficiency trade-off, particularly over the long term, but rather the opposite. Hence, the results of this report underscore the urgency for policies that address intergenerational inequalities in Mexico in order to support sustainable development and equitable growth.

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Appendix A. Methodology

To estimate social mobility in this report, we use 42 nationally and regionally representative household surveys across eight Latin American countries (Argentina, Brazil, Chile, Colombia, Ecuador, Guatemala, Panama, and Peru) as well as the ESRU-EMOVI 2023 survey for Mexico. The selection criteria include countries with at least one survey containing retrospective questions and enough observations to compute regional estimates for both educational and income mobility indicators. In all cases, we applied survey weights to ensure the observations represent the full population.

The main social mobility indicator in this report is the persistence coefficient, calculated as the slope coefficient from a linear regression of children's outcomes on parental education (measured in years of schooling). We define parental education as the highest educational attainment between the mother and father, serving as our proxy for children's social background. Children's outcomes are defined as either years of schooling or the per capita income percentile to which they belong. Percentiles are computed within cohorts to avoid potential life-cycle biases. Per capita household income is computed as the sum of individual income for all household members, divided by household size. For the ESRU-EMOVI 2023, we use the variables "p101," "p102," and "tamhog" to calculate per capita household incomes. The persistence coefficient is represented by the estimated β from the following regression for children c born in household i from parents p:

$$Y_{ic} = \alpha + \beta E_{ip} + \gamma X_{ic} + \varepsilon_i$$

Where E_{ip} is parental education, X_{ic} is a set of control variables including gender, age, and migration status, and ε_i is an error term. Y_{ic} represents either children's education or income rank.

We also include an additional intergenerational mobility indicator based on transition probabilities, called the risk ratio. This indicator measures the relative probability that individuals from high socioeconomic backgrounds, compared to those from low socioeconomic backgrounds, will achieve a certain level of education or income. The risk ratio (RR) is expressed as follows:

$$RR_{ic} = \frac{Prob(Y_{ic} \geq s_c | Y_{ip} \geq s_p)}{Prob(Y_{ic} \geq s_c | Y_{ip} < s_p)}$$

Where s_c is the threshold for children, and s_p is the threshold for parents. In our estimations, s_p represents completed secondary education, and s_c represents completed secondary education for educational mobility and the 50th income rank (median) for income mobility. Thus, the RR indicators in this report reflect the relative probability of children born to parents with at least secondary education attaining this level or reaching the higher end of the income distribution, compared to children of parents with less than completed secondary education.

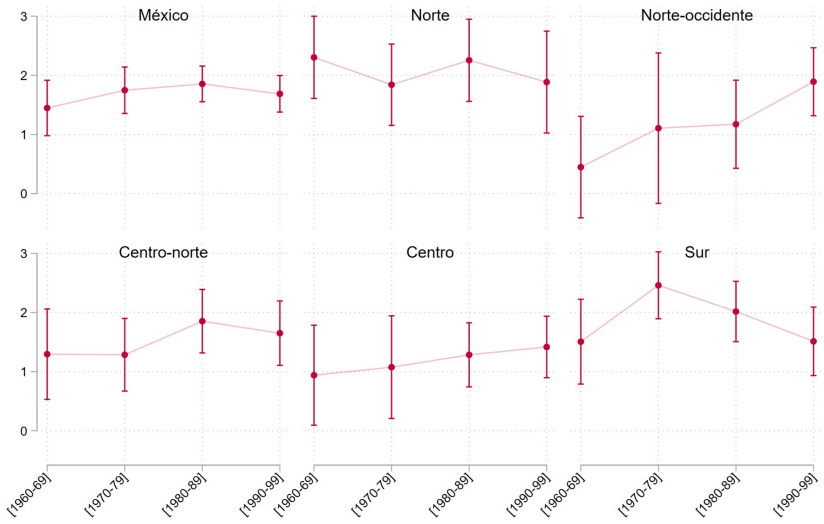
Appendix B. Alternative measures

Persistence coefficient using children's income ranking

Figure A1. Intergenerational persistence in Mexico

Notes: Intergenerational persistence coefficient, where higher values (darker blue) indicate lower mobility across generations.
Source: ESRU-EMOVI 2023, own estimates.

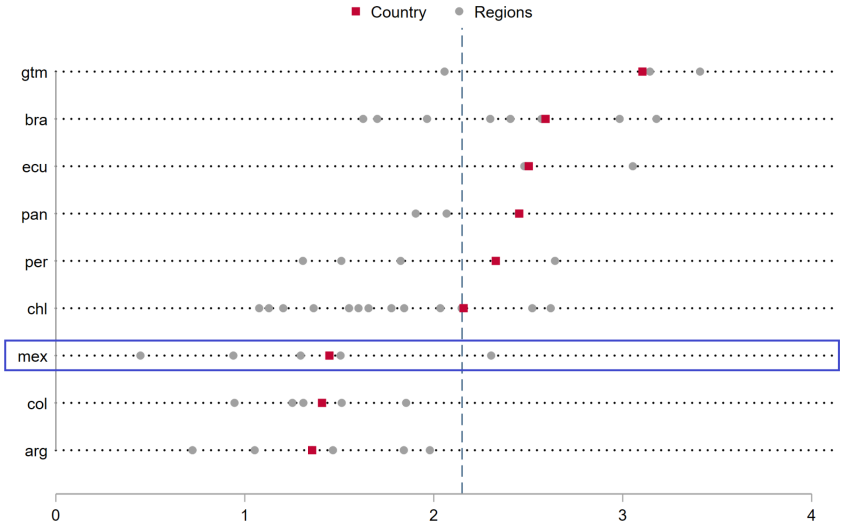
Figure A2. Intergenerational persistence trends in Mexico



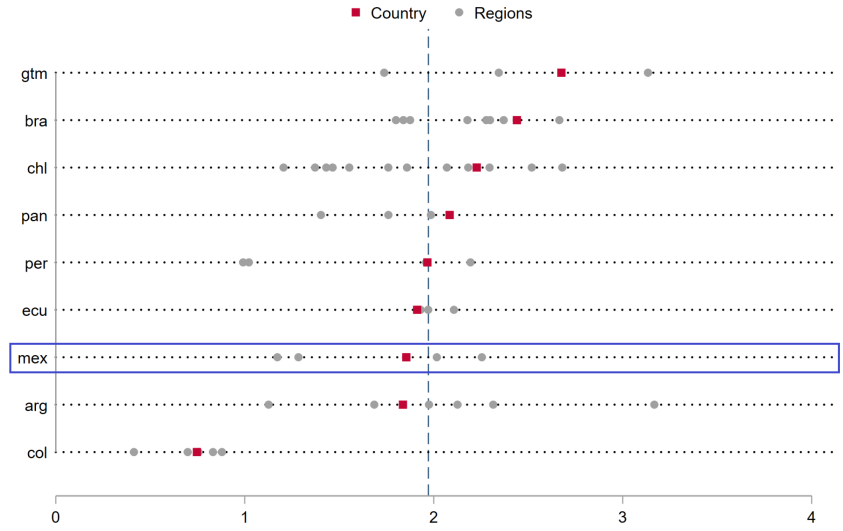
Notes: intergenerational persistence coefficient, where higher values indicate lower mobility across generations.
Source: ESRU-EMOVI 2023, own estimates.

Figure A3. Regional comparison between Mexico and Latin American countries

1960-1969 Birth cohort



1980-1989 Birth cohort



Notes: estimates of the intergenerational persistence coefficient. The vertical dashed line corresponds to the Latin American average. Red dots represent national estimates, while gray dots represent regional estimates.
Source: ESRU-EMOVI 2023 for Mexico, and National Household Survey 1994-2015, own estimates.

Figure A4. Geographical distribution of intergenerational mobility in Latin America

Notes: estimates of the intergenerational persistence coefficient.
Source: ESRU-EMOVI 2023 for Mexico, and National Household Survey 1994-2015, own estimates.

Appendix C.

Table C1. Intergenerational persistence in Mexico

	Mexico	Norte	Norte-occidente	Centro-norte	Centro	Sur
A. Education						
[1960-69]	0.50	0.39	0.28	0.41	0.57	0.54
[1970-79]	0.35	0.29	0.32	0.41	0.36	0.36
[1980-89]	0.38	0.40	0.34	0.30	0.38	0.43
[1990-99]	0.44	0.38	0.45	0.39	0.48	0.44
Mean	0.42	0.36	0.35	0.38	0.45	0.44
B. Income rank						
[1960-69]	1.46	2.30	0.47	1.31	0.95	1.53
[1970-79]	1.76	1.82	1.11	1.31	1.08	2.48
[1980-89]	1.85	2.23	1.20	1.88	1.27	2.02
[1990-99]	1.70	1.90	1.88	1.66	1.43	1.52
Mean	1.69	2.06	1.17	1.54	1.18	1.89

Notes: the table shows estimates of the intergenerational persistence coefficient. Panel A shows the estimates using educational attainment of children, while panel B shows estimates using children's income percentile.
Source: ESRU-EMOVI 2023.