

Mexico - Encuesta Nacional de Ingresos y Gastos de los Hogares 2014, Nueva Construcción

Instituto Nacional de Estadística y Geografía (INEGI)

Report generated on: January 22, 2025

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Identification

SURVEY ID NUMBER

MEX_2014_ENIGH_v01_EN_M_v01_A_ESS

TITLE

Encuesta Nacional de Ingresos y Gastos de los Hogares 2014, Nueva Construcción

TRANSLATED TITLE

National Household Income and Expenditure Survey 2014, New Construction

COUNTRY

Name	Country code
Mexico	Mex

STUDY TYPE

Survey

ABSTRACT

The National Institute of Statistics and Geography (INEGI) presents two methodological documents in which the main characteristics of the new construction of the ENIGH 2014 are presented, which coincides with the construction of variables of the Socioeconomic Conditions Module of the ENIGH 2014.

The objective of the ENIGH is to provide a statistical overview of the behavior of household income and expenditures in terms of their amount, origin and distribution; it also offers information on the occupational and sociodemographic characteristics of household members, as well as the characteristics of the housing infrastructure and household equipment.

Since 1984, when INEGI began to conduct the survey, new methodologies have been developed, international recommendations have been issued and good practices have been documented for the generation of household income and expenditure information through surveys.

During this period, additions have been made to the subject matter, methodological updates and innovations in the processes to obtain results that reflect reality, taking into account international recommendations and the information requirements of the different users, always ensuring historical comparability.

However, when the adoption of the recommendations and good practices implied a break in the comparability of the results, it was preferred to maintain comparability.

Starting in 2008, INEGI decided to publish the results of the ENIGH, whose variables have been constructed and presented in accordance with UN recommendations, specifically, those issued at the 17th International Conference of Labor Statisticians and in the Canberra Group Report. This new construction, moreover, is the one used in the ENIGH's Socioeconomic Conditions Module database, which is the source of information for the multidimensional poverty measurement conducted by the National Council for the Evaluation of Social Development Policy (CONEVAL). For the 2014 ENIGH, INEGI decided to continue presenting these results in order to give continuity to the results presented in 2008.

This survey additionally provides information on the occupational and socio-demographic characteristics of household members, as well as the characteristics of the housing infrastructure and household equipment.

The ENIGH, with the statistics it generates, contributes to the institutional task of providing the public service of statistical information of national interest.

The results of the ENIGH are used for different purposes, among which the following can be mentioned:

- Generation of weightings for the realization of the National Consumer Price Index.
- Construction of indicators for the study of poverty.
- Conformation of the Household Account of Mexico's System of National Accounts.
- Calculation of statistics on living standards.
- Studies of the behavior of the national economy in the field of household economics and comparisons with other countries.

KIND OF DATA

Probabilistic household survey

UNIT OF ANALYSIS

Household, housing and household members

Scope

NOTES

Income distribution

TOPICS

Topic
Household income
Household expenditures
Distribution of income
Income in kind
Transfers of income received and paid
Income or expenditure-based measures of poverty
Consumer protection
Consumption patterns
Consumer durables
Household wealth

KEYWORDS

Keyword
Income
Expenditure
Households

Coverage

GEOGRAPHIC COVERAGE

National

- Urban area: localities with 2,500 and more inhabitants.
- Rural area: localities with less than 2,500 inhabitants

States

- Tabasco

UNIVERSE

The survey is aimed at households in the national territory.

Producers and sponsors

PRIMARY INVESTIGATORS

Name
Instituto Nacional de Estadística y Geografía (INEGI)

FUNDING AGENCY/SPONSOR

Name	Abbreviation
Instituto Nacional de Estadística y Geografía	INEGI

Sampling

SAMPLING PROCEDURE

Sample design

The sample design for ENIGH-2014 is characterized by being probabilistic. Consequently, the results obtained from the survey are generalized to the entire population. At the same time, the design is two-stage, stratified and by clusters, where the ultimate unit of selection is the dwelling and the unit of observation is the household.

Survey framework

The sample design for ENIGH-2014 is characterized by being probabilistic; consequently, the results obtained from the survey are generalized to the entire population. For the selection of the sample, INEGI's 2012 National Housing Framework was used, constructed from the cartographic and demographic information obtained from the 2010 Population and Housing Census. This frame is actually a master sample from which the samples for all housing surveys conducted by INEGI are selected. Its design is probabilistic, stratified, one-stage and by clusters; the latter are also considered primary sampling units, since it is in them where the dwellings that make up the samples of the different surveys are selected in subsequent stages.

Formation of the primary sampling units (PSU)

The primary sampling units are made up of groups of dwellings with different characteristics depending on the area to which they belong, as specified below:

a) In high urban areas

The minimum size of a PSU is 80 inhabited dwellings and the maximum size is 160:

- A block.
- The union of two or more contiguous blocks from the same AGEB.1
- The union of two or more contiguous blocks of different AGEBs of the same locality.
- The union of two or more contiguous blocks of different localities, belonging to the same size of locality.

b) In urban complement

The minimum size of a PSU is 160 inhabited houses and the maximum is 300.
formed by:

- A block.
- The union of two or more contiguous blocks of the same AGEB.
- The union of two or more contiguous blocks of different AGEB of the same locality.
- The union of two or more contiguous blocks of different AGEB and localities, but of the same municipality.

c) In rural areas

The minimum size of a PSU is 160 inhabited dwellings and the maximum size is 300:

- An AGEB.
- Part of an AGEB.
- The union of two or more adjoining AGEB of the same municipality.
- The union of an AGEB with a part of another adjoining AGEB of the same municipality.

Stratification

The political division of the country and the conformation of localities differentiated by size naturally form a first geographic stratification.

In each federative entity, three areas are distinguished (high urban, urban complement and rural), divided in turn into seven zones according to the size of the locality, as indicated below:

High urban

01 - 32 self-represented cities (C.A.) with 100,000 inhabitants or more.

02 - Rest of cities with 100,000 or more inhabitants.

Urban complement

25 - With 50 000 to 99 999 inhabitants.

35 - From 15,000 to 49,999 inhabitants.

45 - From 5 000 to 14 999 inhabitants.

55 - From 2 500 to 4 999 inhabitants.

Rural

60 - Localities with less than 2,500 inhabitants.

This stratification considers the socio-demographic characteristics of the inhabitants of the dwellings, as well as their physical characteristics and equipment, expressed by means of 24 indicators constructed with information from the XII General Population and Housing Census 2000, for which multivariate statistical methods were used.

In a second stage, each PSU was assigned according to its geographic stratum (entity-area-zone).

In a third stage, within each zone and stratum (sociodemographic), some of the PSUs were subjected to a new stratification process with the purpose of having a greater differentiation at that level. For this stratification, indicators differentiated by area were used. The result is a total of 888 substrata at the national level.

Sample Size

For the calculation of the sample size of the ENIGH-2014, the average total current income per household was considered as the reference variable and a nationwide sample of 10 062 households was determined.

DEVIATIONS FROM THE SAMPLE DESIGN

As a result of the sum of the 21,427 selected households and 359 additional households that were found in these dwellings, the total amounted to 21,786 households.

RESPONSE RATE

The national data show that in 89.4% of the cases a complete interview result was obtained, of which 72.2% corresponded to an interview conducted with a direct informant; 3.1% to an interview conducted with an indirect informant; 12.9% to an interview conducted in another ten with a direct informant and 1.2% to an interview conducted in another ten with an indirect informant.

Non-response totaled 10.6%, highlighting type A non-response, which refers to inhabited dwellings; type B, which refers to uninhabited dwellings; and type C, which refers to dwellings outside the sample frame, with a participation of 3.8%, 6.1% and 0.7%, respectively.

Data Collection

DATES OF DATA COLLECTION

Start	End	Cycle
2014-07-09	2014-08-29	Capacitación
2014-08-11	2014-11-28	Levantamiento
2014-09-06	2014-12-18	Captura y validación
2015-04-27	2015-07-06	Explotación de la base de datos

2015-07-16	2015-07-16	Publicación de resultados
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DATA COLLECTION MODE

Face-to-face [f2f]

DATA COLLECTION NOTES

The offices are responsible for carrying out and implementing the operations, where the following processes are carried out: information gathering, supervision, capture and validation of the information.

Survey operations

To cover the requirements of the conceptual framework designed for the ENIGH, the collection of information was programmed in nine surveys, each of them organized in ten days. The survey was conducted from August 11 to November 28, 2014. It should be noted that there were also two complementary activities. One of them took place from August 1 to 8, during which a complete rehearsal of the survey was carried out. The other activity consisted of the implementation of a recovery decade, from November 19 to 28, which served to recover pending questionnaires from previous decades.

Activities during the survey

Each decade is made up of ten days, where for each day specific activities were defined for the collection of information: On the first day of the interview, initial contact is established with the head of household, the housewife or a person over 18 years of age, explaining the objectives of the survey; the information from the Household and Housing Questionnaire is collected; the person or persons who make the purchases of food, beverages and tobacco for the consumption of the household as a whole are probed. This person or persons are trained to fill out the Daily Expenses Booklet, and it is explained to the informant that the persons aged 12 or older will be interviewed personally, asking about the times when they can be reached and making appointments with each of them.

The second day of the household visit is dedicated to asking about other expenses in the Household Expenses Questionnaire, probing which members of the household make personal expenses or the payment of some service or other expenses for the household as a whole.

From the third to the seventh day of the interview, information is collected from all household members in the following order: first, information is collected from the Questionnaire for persons 12 years of age or older and the Business Questionnaire and the person is asked about the expenses that this person makes personally or for the household, in order to make the corresponding record in the Expenses Questionnaire. If the informant knows the information of those under 12 years of age, these interviews are distributed in the rest of the days. Every day, the information recorded in the Daily Expenditure Booklet is reviewed and if there are problems in the record, the informant is probed.

On the seventh day of the ten-day period, once the interviews are completed, the Daily Expense Booklet is collected, any pertinent clarifications are made with the informant and the workloads are delivered to the Supervisor.

On the eighth day, a general meeting is held with the field teams and doubts from the previous ten days are clarified. The Supervisor of the following decade delivers the workload and the packages with the corresponding materials. The ninth and tenth days are rest days.

Procedures for the control of the survey of ENIGH 2014

Sample control

To facilitate the control of the sample, each household was assigned a unique identification number at the national level, which is composed of two folios: the first is the FOLIOVIV, which is composed of 10 digits and identifies the dwelling, and the second is the FOLIOHOG, which is 1 digit and identifies the number of households in the dwelling:

FOLIOVIV

It consists of 10 digits: two digits with the state code, one with the area (urban, code other than 6; rural, code 6), four digits of the consecutive number of the upm (primary sampling unit), one digit of the ten-digit survey and two digits with a consecutive number for the selected dwelling.

FOLIOHOG

Digit to identify the households in the dwelling: 1 is assigned to the main household (the one that initially attended the interview) or when only one household lives in the dwelling; when several households (additional households) are detected, digits from 2 to 5 are assigned.

Household 1 is the household initially interviewed, which is the one that answers the housing section. When more than one household was found in the same dwelling, these other households were also interviewed. For them, the FOLIOVIV number coincides with the FOLIOVIV of the household initially interviewed, differing in the FOLIOHOG which can be from 1 to 6,

depending on the number of households that were found.

Workload

Considering the complexity of the information to be collected and based on the experience of previous surveys, it was determined that the workload per Interviewer would be five interviews per ten, and the Supervisors would have an average of three Interviewers under their supervision.

Questionnaires

QUESTIONNAIRES

For the collection of information in each household, six collection instruments will be used, four of which concentrate information on the household as a whole.

These are:

- Household and housing questionnaire
- Household expenditure questionnaires
- Daily expenditure booklet
- Social programs module

In the other three, individual information is recorded for individuals.

Questionnaire for persons 12 years of age or older

- Questionnaire for persons under 12 years of age
- Questionnaire for household businesses

Data Processing

DATA EDITING

Data capture activities

The capture consisted of transferring the information from the questionnaires that were fully answered to electronic media through IKTAN, in accordance with the procedures established for the capture process of the ENIGH 2014.

On the eighth day of the decade, the Responsible for Capture Validation together with his work team began the capture of the questionnaires collected by each Interviewer, organized by packages of questionnaires of each folio with a complete interview result, following the following established order:

- Package cover (ENIGH-1).
- Household and housing questionnaire.
- Questionnaires for persons under 12 years of age.
- Questionnaires for persons 12 years of age or older.
- Questionnaires for household businesses.
- Questionnaire of household expenses.
- Booklet of daily expenses.

In addition, the IKTAN made it possible to record and know the progress or completion of the workloads.

Validation activities

In parallel to the capture, validation began at the state level, which was carried out in two stages. The first stage consisted of verifying the valid ranges of the folios released for capture, and the second stage consisted of applying the validation criteria in order to purge the files of inconsistencies and omissions before releasing them and sending them to the central office.

Integration and validation of the capture database at central offices

Once the information capture and verification stage is completed, the capture database is integrated. This database was built during the capture and validation process, since IKTAN deposited the validated information directly into the database. Subsequently, general validation criteria are applied in order to purge the files of inconsistencies and omissions between the

different tables of the database. Along with this activity, a database of interview results and the number of members of the households that had a complete interview is generated and sent to the geostatistical frameworks area, which is responsible for generating the expansion factors, corrected for non-response.

Creation of the operational database and generation of tabulations

From the database resulting from the validation process, an operational database is generated containing standardized information per quarter as well as the variables derived according to the survey objectives. Frequencies by key and a concentrate of control figures are also obtained to ensure that the file is free of errors and inconsistencies. Comparisons are made with other sources and previous surveys. Once this last stage of information analysis has been carried out, we then proceed to generate the tabulations that make up the different publications generated by the ENIGH.

Data Appraisal

ESTIMATES OF SAMPLING ERROR

For the evaluation of the sampling errors of the main estimates, the "Ultimate Clustering" method was used, based on the fact that the largest contribution to the variance of an estimator, in a multistage design, is that which occurs among the primary sampling units (PSUs), the term "Ultimate Clustering" is used to denote the total number of units sampled from a primary sampling unit.

Access policy

CONTACTS

Name	Affiliation	Email	URL
User Service	INEGI	atencion.usuarios@inegi.org.mx	Link

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INEGI

Metadata production

DDI DOCUMENT ID

DDI_MEX_2014_ENIGH_v01_EN_M_v01_A_ESS_FAO

PRODUCERS

Name	Abbreviation	Role	Affiliation
Instituto Nacional de Estadística y Geografía	INEGI		
Dirección General de Estadísticas Sociodemográficas	DGES		
Dirección General Adjunta de Encuestas Sociodemográficas y Registros Administrativos	DGAESRA		
Dirección de Encuestas Tradicionales			
Subdirección de Encuestas de Ingresos y Gastos		Survey documentation and metadata review.	
Dissemination and Outreach Team, Statistics Division		Metadata adapted for FAM	Food and Agriculture Organization of the United Nations

Data Dictionary

Data file	Cases	Variables
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