

Mexico - Encuesta Nacional de Ingresos y Gastos de los Hogares 2016, Nueva serie

National Institute of Statistics and Geography (Instituto Nacional de Estadística y Geografía)

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Identification

SURVEY ID NUMBER

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TITLE

Encuesta Nacional de Ingresos y Gastos de los Hogares 2016, Nueva serie

TRANSLATED TITLE

National Household Income and Expenditure Survey 2016, New series

COUNTRY

Name	Country code
Mexico	Mex

STUDY TYPE

Survey

SERIES INFORMATION

Background: The ENIGH has its antecedents from 1956 and 1958 when the General Directorate of Statistics (DGE), then under the Ministry of Industry and Commerce (SIC), carried out the survey Income and Expenditure of the Population in Mexico, and in 1960 The 16 Cities of the Mexican Republic, Family Income and Expenditure. For its part, for the years 1963 and 1968, the Bank of Mexico carried out the survey on Family Income and Expenditure.

In the period 1969-1970, the DGE-SIC again carried out the Income and Expenditure Survey of the Mexican Republic. Subsequently, in 1975, the Ministry of Labor and Social Welfare (STPS) carried out a so-called Family Income and Expenses. In 1977, the DGE, as part of the Secretariat of Programming and Budget (SPP), developed the National Household Income-Expenditure Survey, a work that constituted the immediate antecedent of the surveys carried out by the DGE-INEGI for the periods: 1984, 1989, 1992, 1994, 1996, 1998, 2000, 2002, 2004, 2005, 2006, 2008, 2010, 2012, 2014 and 2016.

ABSTRACT

The National Survey of Household Income and Expenditure (ENIGH) aims to provide a statistical overview of the behavior of household income and expenditure in terms of its amount, origin and distribution. In addition, it offers information on the occupational and sociodemographic characteristics of the members of the household, as well as the characteristics of the housing infrastructure and household equipment.

The ENIGH is part of the Information System of National Interest (IIN), which means that the results obtained from this project are mandatory for the Federation, the states and the municipalities, in order to contribute to national development.

In 1984, a trend began to broaden the objectives and homogenize the methodology, taking into account international recommendations and the information requirements of the different users, taking care of historical comparability.

Periodicity: Since 1992 it has been carried out biennially (every two years) with the exception of 2005 when an extraordinary survey was carried out.

Target population: It is made up of the households of nationals or foreigners, who usually reside in private homes within the national territory.

Selection Unit: Private home. The dwellings are chosen through a meticulous statistical process that guarantees that the results obtained from only a part of the population (sample) can be generalized to the total.

Sampling Frame: INEGI's multi-purpose framework is made up of demographic and cartographic information obtained from the 2010 Population and Housing Census.

Observation unit: The home.

Unit of analysis: The household, the dwelling and the members of the household.

Thematic coverage:

Characteristics of the house.
Residents and identification of households in the dwelling.
Sociodemographic characteristics of the residents of the dwelling.
Home equipment, services.
Activity condition and occupational characteristics of household members aged 12 and over.
Total current income (monetary and non-monetary) of households.
Financial and capital perceptions of households and their members.
Current monetary expenditure of households.
Financial and capital expenditures of households.

The different concepts of the ENIGH are governed by recommendations agreed upon in international conventions, for example:

The resolutions and reports of the 18 International Conferences on Labour Statistics, of the International Labour Organization (ILO).

The final report and recommendations of the Canberra Group, an expert group on "Household Income Statistics".

Manual of Household Surveys. Department of International Economic and Social Affairs, Bureau of Statistics. United Nations, New York, 1987.

They are also articulated with the CNational Accounts and with the Household Surveys carried out by the INEGI.

Sample size: At the national level, including the ten-one, there are 93,186 private homes.

Survey period: The collection of information will take place between August 11 and November 18 of this year. Throughout this period, ten cuts are made, each organized in ten days; Therefore, each of these cuts will be known as tens (see calendar in the annex).

Workload: According to the meticulousness in the recording of information in this project, a load of six interviews in private homes per dozen has been defined for each interviewer. The number of interviews may decrease or increase according to several factors: non-response, recovery from non-response, or additional households.

KIND OF DATA

Probabilistic household survey

UNIT OF ANALYSIS

The Home, the Dwelling, and the Members of the Household

Scope

NOTES

Daily Expense Booklet
Section 1.1 Food, Beverages and Tobacco
Section 1.2 Public Transportation
Section II. Monthly Estimate

Household Expenditure Questionnaire
Section I. Monthly Expenditure
Section II. Quarterly Expenditure
Section III. Semi-Annual Expenditure

Household and Housing Questionnaire
Section I. Characteristics of the Dwelling
Section II. Residents and Identification of Households in the Dwelling
Section III. Sociodemographic Characteristics
Section IV. Access to Food
Section V. Household Equipment
Section VI. Transfer Time to the Hospital

Questionnaire for Persons 12 Years of Age or Older

Section I. Occupation Status of Household Members Aged 12 Years and Older
 Section II. Characteristics and Income of the Main Job for Subordinates
 Section III. Characteristics and Income from the Main Job for Self-Employed Persons
 Section IV. Characteristics and Income from Secondary Work
 Section V. Income from other Work for the Past Month
 Section VI. Income from Work Performed Prior to Last Month
 Section VII. Unearned Income
 Section VIII. Social Networks
 Section IX. Use of Time
 Section X. Health

Questionnaire for Persons Under 12 Years of Age
 Section I. Income of Household Members Under 12 Years of Age
 Section II. Access to Health Care for Household Members Under 12 Years of Age

Home Business Questionnaire
 Characteristics and Income of Household Businesses
 Format A) Industrial, Commercial and Service Businesses
 Format B) Agricultural Businesses
 Format C) Animal Breeding, Exploitation and By-Product Businesses
 Format D) Logging, Forest Harvesting and Product Harvesting Businesses
 Format E) Hunting and Trapping Businesses
 Format F) Fishing Business

TOPICS

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

KEYWORDS

Keyword
Income
Expenditure
Households

Coverage

GEOGRAPHIC COVERAGE

National and at the level of the federal entity.

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

UNIVERSE

The survey is aimed at households in the national territory.

Producers and sponsors

PRIMARY INVESTIGATORS

Name
National Institute of Statistics and Geography (Instituto Nacional de Estadística y Geografía)

FUNDING AGENCY/SPONSOR

Name	Abbreviation
National Institute of Statistics and Geography (Instituto Nacional de Estadística y Geografía)	INEGI

Sampling

SAMPLING PROCEDURE

The design of the exhibition for ENIGH-2016 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 conglomerates, where the ultimate unit of selection is the dwelling and the unit of observation is the home.

For the selection of the sample, the National Housing Framework 2012 of the INEGI was used, built from the cartographic and demographic information obtained from the 2010 Population and Housing Census.

This sample is a master sample from which the subsamples are selected for all the housing surveys carried out by INEGI; its design is probabilistic, stratified, single-stage and clustered; The latter are also considered primary sampling units, since it is in them that the dwellings that make up the samples of the different surveys are selected, in a second stage. The master sample is constructed as follows:

Formation of the primary sampling units (UPM)

First, the set of UPMs that will cover the national territory is constructed.

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

a) In high urban areas

The minimum size of a UPM is 80 inhabited dwellings and the maximum is 160. They can be made up of:

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

b) In urban complement:

The minimum size of a UPM is 160 inhabited dwellings and the maximum is 300. They can be made up of:

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

c) In rural areas:

The minimum size of a UPM is 160 inhabited dwellings and the maximum is 300. They can be made up of:

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

The total number of UPMs formed was 245,279.

Stratification

Once the set of PUs has been constructed, those with similar characteristics are grouped, that is, they are stratified.

The political division of the country and the formation of localities differentiated by their size, naturally form a geographical stratification.

In each state, three areas are distinguished, divided in turn into Areas.

High urban, Zone 01 to 09, Cities with 100,000 or more inhabitants.

Urban complement, Zone 25, 35, 45 and 55, From 50,000 to 99,999 inhabitants, 15,000 to 49,999 inhabitants, 5,000 to 14,999 inhabitants, 2,500 to 4,999 inhabitants.

Rural, Zone 60, Localities with less than 2,500 inhabitants.

At the same time, four sociodemographic strata were formed in which all the UPMs in the country were grouped, this stratification considers the sociodemographic characteristics of the inhabitants of the dwellings, as well as the physical characteristics and equipment of the same, expressed through 34 indicators built with information from the 2010 Population and Housing Census*, for which multivariate statistical methods were used.

In this way, each PSU was classified into a single geographical and a sociodemographic stratum.

As a result, there are a total of 683 strata throughout the country.

Selection of the UPMs of the master sample

The UPMs of the master sample were selected by means of a sampling with probability proportional to the size.

Sample size

For the calculation of the sample size of the ENIGH-2016, an estimate of the mean for the variable of quarterly current income per household was considered.

DEVIATIONS FROM THE SAMPLE DESIGN

As a result of the sum of the 81,515 homes selected and 1,203 additional households that were found in those homes, the total amounted to 82,718 households.

RESPONSE RATE

Data at the national level show that in 85.00% of the cases the result of a complete interview was obtained, of which 56.00% corresponded to an interview conducted with a direct informant; 19.25% to interviews with an indirect informant; 6.66% to an interview conducted in another ten with a direct informant and 3.08% to an interview conducted in another ten with an indirect informant.

The non-response totaled 15.00%, highlighting the type A non-response that refers to inhabited homes; type B that are uninhabited homes and type C that are homes outside the sample frame, with a share of 7.78%, 6.52% and 0.70% respectively.

Data Collection

DATES OF DATA COLLECTION

Start	End	Cycle
2016-06-13	2016-08-10	Training

2016-08-21	2016-11-28	Survey
2016-08-21	2016-12-30	Capture and validation
2017-01-02	2017-08-18	Database Exploitation
2017-08-28	2017-08-28	Publication of results

DATA COLLECTION MODE

Face-to-face [f2f]

DATA COLLECTION NOTES

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

To meet the requirements of the conceptual framework designed for the ENIGH 2016, the collection of information was scheduled in nine surveys, each of them organized in ten days. The survey was carried out from August 21 to November 28, 2016. It should be clarified that there were also two complementary activities. One of them had a verification from August 3 to 10, in which a complete rehearsal of the survey was carried out. The other activity consisted of the implementation of a dozen recovery questionnaires, from November 19 to 28, which served to recover questionnaires with no response and lift the workloads that had been pending in previous decades.

Activities during the survey

Each decade is made up of ten days, where specific activities were defined for each day for the collection of information:

On the first day of the ten, initial contact is established with the head of the household, the housewife or with a person over 18 years of age, explaining the objectives of the survey; the information from the Household and Housing Questionnaire is collected; It is probed who is the person or persons who make the purchases of food, beverages and tobacco for the consumption of the household as a whole. And this person or persons are trained in filling out the Daily Expenses Booklet, and it is explained to the informant that people aged 12 or over will be interviewed personally, asking for the times at which they can be reached and making appointments with each of them.

The second day of the home visit is dedicated to asking about the other expenses in the Household Expenditure 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 ten, the information of all the members of the household is captured in the following order: first, the information from the Questionnaire for people aged 12 or over and the Business Questionnaire is collected and asked about the expenses that this person makes personally or for the household. to make the corresponding record in the Expenditure Questionnaire. If the informant knows the information of children under 12 years of age, these interviews are distributed on the rest of the days. Every day the information recorded in the Daily Expenses Booklet is reviewed and if there are problems in the record, the informant is surveyed.

On the sixth day of the ten, request the monthly estimate corresponding to section II Expenditure on food, beverages and tobacco for the household or to give to people outside the household, public transport, social programs and finally shopping habits, all this is noted in the Daily Expenses Booklet.

On the seventh day of the ten, the Daily Expenses Booklet is collected, once the interviews are finished, the workloads are delivered to the Supervisor; who in turn delivers them to the Chief Supervisor.

On the eighth day, the general meeting is held with the field teams and doubts from the previous ten are clarified; The Chief of Supervisors deliver to the REP the workloads of the previous ten and receive the loads of the next ten, to deliver them to the Supervisor.

Control of the sample

To facilitate the control of the sample, each household was assigned a unique identification number at the national level that is made up of two folios: the first is the FOLIOVIV which is made up 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

- The first 7 digits are made up of the UPM number.
- The eighth digit indicates the ten digits in which the information was scheduled to be collected.
- The ninth and tenth digits correspond to a consecutive number of the home.

FOLIOHOG

- This digit indicates the number of households that live in the house.

Household 1 is the one initially interviewed, which answers the housing section. When more than one household was found in the same household, these other households were also interviewed. For them, the number of FOLIOVIV coincides with the FOLIOVIV of the initially interviewed household, differentiating in the FOLIOHOG which can be from 2 to 5, depending on the number of households that have been found.

Workloads

It was determined that in the ENIGH 2016 the workload per interviewer was six interviews per ten, and the Supervisors had an average of three interviewers under their supervision.

Questionnaires

QUESTIONNAIRES

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

These are:

- Household and housing questionnaire
- Household expenditure questionnaires
- Daily expenditure booklet

In the other three, individual information is recorded for people

- Questionnaire for people aged 12 and over
- Questionnaire for people under 12 years of age
- Questionnaire for household businesses

Data Processing

DATA EDITING

Capture activities

The capture consisted of transferring the information from the questionnaires that were fully answered to electronic means through IKTAN, in accordance with the procedures established for the capture process of the ENIGH 2016.

The Person in Charge of Capture and Validation, together with his work team, began the capture of the questionnaires collected by each Interviewer, organized by packages of questionnaires of each page with the result of a complete interview, following the established order:

- Household and housing questionnaire.
- Questionnaires for people under 12 years of age.
- Questionnaires for people aged 12 and over.
- Questionnaires for home businesses.
- Household expenditure questionnaire.
- Daily expenses booklet.

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

Validation activities

In parallel to the capture, the state coordination began the validation of the sheets with complete capture, which complied with the verification of valid ranges. The validation consisted of the application of the validation criteria through the Analyst and ISE processes, with the aim of purifying the data of possible capture errors, inconsistencies and omissions, before releasing them and storing them in the validation database.

Integration and validation of the capture database in 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, as 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 who had a complete interview is generated to send it to the geostatistical frameworks area that is responsible for generating the expansion factors, corrected for non-response.

Creation of an exploitation database and generation of tabulations

From the database resulting from the validation process, an exploitation database is generated that contains standardized information for the quarter as well as the derived variables according to the objectives of the survey. Key frequencies 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 of the survey. Once this last stage of information analysis has been carried out, then the tabulations that make up the different publications generated by the ENIGH are generated.

Data Appraisal

ESTIMATES OF SAMPLING ERROR

For the evaluation of the sampling errors of the main estimates, the "Ultimate Clusters" method was used, based on the fact that the greatest contribution to the variance of an estimator, in a multistage design, is that which occurs between the primary sampling units (PUs), the term "Ultimate Clusters" is used to denote the total sample units of a primary sampling unit.

Access policy

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INEGI

Metadata production

DDI DOCUMENT ID

DDI_MEX_2016_ENIGH_v01_EN_M_v01_A_ESS_FAO

PRODUCERS

Name	Abbreviation	Role	Affiliation
National Institute of Statistics and Geography (Instituto Nacional de Estadística y Geografía)	INEGI		
General Directorate of Sociodemographic Statistics (Dirección General de Estadísticas Sociodemográficas)	DGES		
Deputy Directorate General of Sociodemographic Surveys and Administrative Records (Dirección General Adjunta de Encuestas Sociodemográficas y Registros Administrativos)	DGAESRA		
Regular Household Surveys Directorate (Dirección de Encuestas Regulares en Hogares)			
Income and Expenditure Survey Subdirectorate (Subdirección de Encuestas de Ingresos y Gastos)		Survey documentation and metadata review	
Statistics Division		Metadata adapted for FAM	Food and Agriculture Organization of the United Nations

Data Dictionary

Data file	Cases	Variables
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