Mexico - Encuesta Nacional de Ingresos y Gastos de los Hogares 2022, Nueva serie

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

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Identification

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TITLE
Encuesta Nacional de Ingresos y Gastos de los Hogares 2022, Nueva serie

TRANSLATED TITLE
National Household Income and Expenditure Survey 2022, 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, 2016, 2018, 2020 and 2022.

ABSTRACT
The objective of the ENIGH is to provide a statistical overview of the behavior of household income and expenditure in terms of its amount, origin and distribution; it also 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.

From 1984, when INEGI began to carry out the survey, until today, new methodologies have been developed, international recommendations have been issued and good practices have been documented for the generation of information on household income and expenditure through surveys.
During this period, additions have been made to the subject of the survey, 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. When the adoption of recommendations and good practices implied a break in the comparability of results, it was preferred to maintain historical comparability.

As of 2008, INEGI decided to publish the results of the ENIGH, whose variables have been constructed and presented in accordance with the recommendations of the UN, specifically, those issued at the 17th International Conference of Labor Statisticians and in the Report of the Canberra Group. This new construction is also the one used in the database of the Socioeconomic Conditions Module of the ENIGH, which is the source of information for the multidimensional measurement of poverty carried out by the National Council for the Evaluation of Social Development Policy (CONEVAL).

However, in addition to mentioning and analyzing the international recommendations that were put into practice at ENIGH 2022, this document also relates the background of ENIGH, how it emerged and the significant changes it has undergone since then; the objectives of the survey and the recruitment instruments used are mentioned; likewise, as the main axis, there is the description of income and expenditure, their sources, their correlation and implications, this, as the main indicators of household well-being; another chapter lists the main users of the survey information; and finally, the schemes of the topics, categories and variables used in the ENIGH 2022 are presented.

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: The sampling frame used is the multipurpose framework of the INEGI, it is constituted with the demographic and cartographic information obtained from the Population and Housing Census 2010.
Effective sample size: 105 525 households
Observation unit: The household.

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 System of National Accounts and with the Household Surveys carried out by INEGI.

Sample size: At the national level there are, including the ten, 105,525 private homes.

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 household, 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, Farming and Animal By-Products 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
Feeding
Consumption
Survey

| Entertainment |
| Expenditure |
| Home |
| Income |
| Occupation |
| Population |
| Poverty |
| Remuneration |
| Work |
| Housing |

Coverage

GEOGRAPHIC COVERAGE
National and at the state level
- 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 (INEGI))

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 subsample for ENIGH-2022 is characterized by being probabilistic; Consequently, the results obtained from the survey are generalized to the entire population of the study domain, in turn it is two-stage, stratified and by clusters, where the ultimate unit of selection is the dwelling and the unit of observation is the household.

The ENIGH-2022 subsample was selected from the 2012 INEGI master sample, this master sample was designed and selected from the 2012 Master Sampling Framework (Marco Maestro de Muestreo (MMM)) which was made up of housing clusters called Primary Sampling Units (PSUs or Unidades Primarias de Muestreo (UPM)), built from the cartographic and demographic information obtained from the 2010 Population and Housing Census. The master sample allows the selection of subsamples for all housing surveys carried out by INEGI; Its design is probabilistic, stratified, single-stage and by clusters, since it is in them that the dwellings that make up the subsamples of the different surveys were selected in a second stage. The design of the MMM was built as follows:

Formation of the primary sampling units (PSUs)
First, the set of PSUs that will cover the national territory is built.
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:

In high urban areas
The minimum size of a PSU 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 of different localities, which belong to the same size of locality.

In urban complement
The minimum size of a PSU is 160 inhabited homes 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 of different AGEBs and localities, but of the same municipality.

In rural areas
The minimum size of a PSU is 160 inhabited homes 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.

In this way, each PSU was classified into a single geographical and a sociodemographic stratum. As a result, a total of 683 strata were obtained throughout the country.

The sample size for the ENIGH 2022 was calculated at the Entity level with urban and rural scope considering the variables and non-response rates mentioned above.

At the Entity level in the urban area, in the case of the variable Quarterly Average Current Income, there is a variation between 31 554.58 and 91 003.53, with a variance that isthe between 609 706 543.70 and 570 110 356 234.59, and a design effect that fluctuates between 1.09 and 4.24.

At the Entity level with a rural environment, the variable Quarterly Average Current Income varies between 14 115.33 and 44 778.03, with a variance that ranges between 156 406 519.01 and 12 108 216 477.28, and a design effect that fluctuates between 1.00 and 9.43. Annex C presents the sample sizes for urban and rural entity areas.

Integrating the sample sizes at the national level, there is a sample size of 105,525 households, which guarantees an error of 4.485% at the national level for the variable average quarterly current income.

DEVIATIONS FROM THE SAMPLE DESIGN
The ENIGH 2022, were raised in a national sample of 105,525 selected homes.

The sample allows information to be obtained at the national level, with a breakdown for localities of 2,500 and more inhabitants and localities of less than 2,500 inhabitants.

RESPONSE RATE
As a result of the sum of the 105,525 homes selected and 1,368 additional households found in those homes, the total amounted to 106,893 households.

Data at the national level show that in 84.3% of the cases the result of a complete interview was obtained, of which 56.0% corresponded to an interview conducted with a direct informant (01); 20.0% to interviews with indirect informants (03); 5.6% to interviews conducted in another ten with a direct informant (02) and 2.7% to interviews conducted in another ten with indirect informants (04).

The non-response totaled 15.7%, with the non-response being type A that refers to inhabited homes; type B, which are uninhabited dwellings, and type C, which are dwellings outside the sampling frame, with a share of 7.3%, 7.4% and 1.0%, respectively.

Data Collection

Start	End	Cycle
2022-06-06	2022-08-19	Training
2022-08-21	2022-11-28	Survey
2022-08-19	2022-12-13	Capture and validation
2023-01-10	2023-07-20	Database Exploitation
2023-07-26	2023-07-26	Publication of results

DATA COLLECTION MODE
Face-to-face [f2f]

DATA COLLECTION NOTES
The state offices are responsible for carrying out the field operation, where the following processes are carried out: information gathering, supervision, capture and validation of the information.

Operation of the uprising.
To meet the requirements of the conceptual framework designed for the ENIGH 2022, the collection of information was scheduled in ten surveys, each of them organized in ten days. The survey was carried out from August 11 to November 18, 2022. It should be clarified that there were also two complementary activities. One of them had verification from August 1 to 9, 2022, 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 surveyed who is the person or persons who make the purchases of food, beverages and tobacco for the consumption of the household as a whole; this person or persons are trained in filling out the Daily Expenses Booklet, and it is explained to the informant that persons 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 spent 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 (Liconsa and Diconsa) 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 of Supervisors.

On the eighth day, the general meeting with the field teams is held and doubts from the previous ten are clarified, the Chief Supervisor delivers to the REP the workloads of the previous ten and receives the loads of the next ten, to be delivered to the Supervisor.

The Supervisor of the next ten delivers the workload and the packages with the corresponding materials. The ninth and tenth days are rest.

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 numbers: the first is the FOLIOVIV which is made up of 10 digits and identifies the house, and the second called FOLIOHOG which is 1 digit and identifies the number of households in the house:
FOLIOVIV
• The first 7 digits are made up of the PSU number.
• The eighth digit indicates the ten digits in which the information was scheduled to be collected. From 1 to 9 and 0 for the 10th ten.
• The ninth and tenth digits correspond to a consecutive number of housing selection at the PSU.
FOLIOHOG
• This digit indicates the number of households that live in the house.
Household 1 is the household 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 2022 the workload per Interviewer was six homes per ten, and the Supervisors had under their supervision, on average, three Interviewers.

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 and validation are two processes that were carried out after the fieldwork. Both processes began on August 22 and ended on December 16, 2022.
The distribution of workloads was also organized into tens. It should be clarified that both the capture and the validation for the ten recovery were concluded in the same times.

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 ENIGH 2022 capture process. On the eighth day of the ten, the Validation Capture Manager 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 the complete interview, following the established order:
• Cover of the package (ENIGH-1).
• 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 coordinations 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.

Monitoring and control of the ENIGH 2022 operation.

In order to keep a record of all the activities carried out by the operational personnel, during the survey a monitoring and control system of the ENIGH was designed, whose objective is to know in detail the development of the field operation.
The State Project Manager is in charge of keeping a record of the personnel and the assignment of workloads in each ten, as well as the activities carried out in the field in his entity, in order to organize the information collected, keep control of the sample and make a preventive diagnosis based on critical and systematic analysis.

To provide this information, two instruments are available: the forms of control of the fieldwork and the IKTAN reports.
These forms of control and reports are designed to provide information in two stages:
• First stage: during the fieldwork, the forms of control are used, which are captured in the IKTAN at the end of each ten.
• Second stage: the reports concentrate and organize the information generated and captured in the forms of control.

Integration and validation of the capture base 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 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 variables derived 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.

Access policy

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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 (Dirección General Adjunta de Encuestas Sociodemográficas)	DGAES		

Regular Household Surveys Directorate (Dirección de Encuestas Regulares en Hogares)			
Income and Expenditure Survey Statistics Generation Subdirectorate (Subdirección de Generación de Estadísticas 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