

## Mexico 2000: Survey Information

### Summary table

<b>Generic information</b>	
Name of survey	Household Income and Expenditure Survey ( <i>Encuesta Nacional de Ingresos y Gastos de los Hogares - ENIGH</i> )
Institution responsible	National Statistical Institute ( <i>Instituto Nacional de Estadística, Geografía e Informática - INEGI</i> )
Frequency	No established periodicity (since 1992 there has been one every two years)
Survey year / Wave	2000 survey
Collection period	3 <sup>rd</sup> quarter 2000 (10 August 2000 to 17 November 2000)
Survey structure	Cross-sectional
Coverage	Households composed of nationals and foreigners (excluding diplomats), who usually reside in private dwellings (institutional or collective dwellings are not included) in the whole national territory
Geographic information	Federal district level.
Files delivered	6 files at different levels: at the household, individual, expenditure on consumptions, capital expenditure, income and in-kind income levels.
<b>Sample size</b>	
Households	20,252 initial size, down to 10,108 in final sample
Individuals in final sample	45,535, of which 44,841 household members (the other being absent heads, domestic servants or guests)
<b>Sampling</b>	
Sampling design	Stratified multi-phase sample: first, basic geostatistical areas (AGEB), stratified according to 5 geographic and socio-economic criteria, are selected, then, for urban areas only, blocks of dwellings, and finally dwellings from each area (rural areas) or block (urban areas).
Sampling frame	INEGI sampling frame for multiple purposes, constituted by demographic and cartographic information obtained with the 1995 National Census ( <i>Conteo de Población y Vivienda</i> ).
<b>Survey instruments</b>	
	Direct and indirect interview over 7 consecutive days with a basic questionnaire and a diary of expenditures.
<b>Standard classifications</b>	
Education	25 categories of national education system
Occupation	4-digit 1996 Mexican Classification of Occupations (Clasificación Mexicana de Ocupaciones - CMO)
Industry	3-digit SCIAN (Sistema de Clasificación Industrial de América del Norte), by and large the same as NAICS, used by US and Canada.
<b>Income</b>	
Reference period	6-month period preceding the interview for most income sources (1 year for self-employment income and last month for own consumption and in-kind income)
Unit of collection	Individual for most income sources (household for own consumption and in-kind income)
Period of collection	Monthly
Gross/net	Amounts are collected net of taxes and contributions; no info on taxes and contributions
<b>Data editing / processing</b>	
Consistency checks	Detailed checks carried out when keying in, editing and coding data.
Weighting	Population inflating weight equal to the inverse of the sampling probability; it makes the sample representative both at the national level and at the subnational levels of urban versus rural areas.
Imputation	No imputation.

This document is based upon the *Documento Metodologico* for the Household Income and Expenditure Survey 2000 (*Encuesta Nacional de Ingresos y Gastos de los Hogares – ENIGH*), National Statistical Institute (INEGI).

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**A. General characteristics**

Official name of the survey/data source:

Household Income and Expenditure Survey (*Encuesta Nacional de Ingresos y Gastos de los Hogares - ENIGH*)

Administrative Unit responsible for the survey:

National Statistical Institute ( <i>INEGI</i> ) Directorate-General for Statistics ( <i>DGS</i> ) Department of ENIGH <a href="http://www.inegi.gob.mx">http://www.inegi.gob.mx</a>
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In 1956 and in 1958, the Directorate-General for Statistics (DGS), at that time part of the Secretariat for Industry and Commerce (SIC), conducted the first two surveys on “Incomes and Outlays of the Mexican Population”. During the period 1969-1970, the DGE-SIC realised the survey “Incomes and Outlays of the Mexican Republic”. In 1975, the Secretariat for Work and Social Insurance” (STPS) carried out “Family Incomes and Expenses”. In 1977 the DGE, become part of the Secretary of Forecasting and Budgeting” (SPP) carried out the “National Survey of Household Incomes and Expenses”, work that constituted the basis for the ENIGH surveys that it has organised under the DGE-INEGI for 1983-84, 1989, 1992, 1994, 1996, 1998, 2000 and 2002.

ENIGH was designed with the primary objective of obtaining information on the distribution, amount and structure of incomes and expenditures for the household with the final aim of evaluating the developments in the standards of living of the population.

The specific objectives of the survey are to provide information on the following:

- the structure of current household income according to the source;
- the structure of current household expenditure for the acquisition of final consumption goods, as well as transfers to other units;

- the value of household own consumption in goods and services as well as in kind transfers and gifts;
- the structure of financial and capital incomes;
- the structure of financial and capital outcomes;
- the socio-demographic characteristics of the household members;
- the activity status and employment characteristics of the household members aged 12 or more;
- the infrastructure characteristics of the dwelling and the equipment of the household.

## **B. Population, sampling size and sampling methods**

### Population coverage

All national or foreign households living in private dwellings in the national territory. Households living in collective dwellings are not included in the sample.

### Sample size

The initial size of the sample was of 20,252 households, down to 10,108 in final sample.

### Sampling design

The sampling frame is the INEGI sampling frame for multiple purposes, constituted by demographic and cartographic information obtained with the 1995 National Census (*Conteo de Poblacion y Vivienda*).

Stratified multi-phase sample: first, basic geostatistical areas (AGEB), stratified according to 5 geographic and socio-economic criteria, are selected, then, for urban areas only, blocks of dwellings are selected, and finally private dwellings from each area (rural areas) or block (urban areas).

## **C. Data collection and acquisition**

### Collection period

The data were collected during the 3<sup>d</sup> quarter of 2000 (from 10 August 2000 to 17 November 2000).

### Reference period

There are different reference periods, depending on the type of information collected:

- incomes: six-month period preceding the interview for most income sources (1 year for self-employment income and last month for own consumption and in-kind income);
- expenditures: mostly weekly or monthly, quarterly and bi-annual for items bought with little frequency;
- socio-demographic characteristics: at the moment of the interview;
- activity status and employment characteristics: the month preceding the interview.

### Data collection

Data collection was organised in segments of 12 ten-day periods during the third quarter of 2000; during the first 7 days, the interviews were carried out, and during the following 3 days the data are transmitted to the Regional Offices where the editing process is started.

Each interview (both direct or indirect) was carried out with the help of the following instruments:

- (1) *A basic questionnaire* – covering socio-demographic characteristics, activity conditions and employment characteristics of household members aged 12 or more, economic transactions of income and expenditures of all household members and infrastructure characteristics of the private dwelling and the equipment of the household.
- (2) *A weekly diary* – the collection of some expenditure items (namely food, drinks and tobacco, and public transport) is done with the help of a weekly diary.

## **D. Definition of the survey units**

### Household

The investigation unit is the household, i.e., a group of persons (not necessarily related by blood) who reside usually in the same private dwelling and share the meals. Domestic servants and guests who usually reside and share meals in the dwelling are considered as usual resident of the dwelling, but not as household members (they are part of the sample, but almost no information is collected for them).

### Head of household

Head of household is the person recognized as such by the household members. A head of household can also be absent (i.e. not living in the dwelling for reasons of work, study or other since at least three months at the moment of the interview); in that case, the head is not considered a household member and no information (apart from sex and age) is collected for him/her.

## **E. Contents**

The INEGI covers the following areas:

- Identification of the dwellings and households
- Characteristics of the dwelling and equipment of the household
- Socio-demographic characteristics of the household members
- Activity status and employment characteristics of the household members aged 12 and over
- Food and drinks consumed within and outside the household, and tobacco
- Weekly expenditure on public transport
- Expenditure on house cleaning and care
- Expenditure on personal care
- Expenditure on education, culture and leisure
- Expenditure on communications and services for vehicles
- Expenditure on housing and maintenance
- Expenditure on clothing, footwear and accessories
- Expenditure on glass and home appliances
- Expenditure on health care
- Expenditure on electric home appliances and household maintenance
- Expenditure on entertainment articles
- Expenditure on transport
- Other expenditure
- Financial and capital transactions
- Net household income
- Income from businesses owned by the household

## **F. Quality of data**

### Response rate

The non-response rate of the 2000 survey amounted to 14.2%.

### Editing and coding

There are three types of quality controls:

- first, during the interview, the interviewers are directly supervised by the group leaders;
- after the interviews, the supervisors carries out about 12% of re-interview to check the effective realisation of the interviews;
- finally, during the inputting phase, the codificators revise and analyse the information collected in a detailed manner, with the objective of eliminate errors, omissions and inconsistencies.

### Imputation

Not clear: there are hardly any missings in the data: is there imputation?

### Weighing procedure

The weight, calculated at the household level only, has the functions of expanding to the total population, and of making the sample representative at the following levels:

- national level;
- localities with 2,500 inhabitants or more (urban);
- localities with less than 2,500 inhabitants (rural).

## **G. Uses of the survey**

### Publications

- Diferencias de Género en las Aportaciones al Hogar y en el Uso del Tiempo.
- Encuesta de Ingresos y Gastos de los Hogares del Área Metropolitana de la Ciudad de México, 1992. Características de la Vivienda por Niveles de Ingreso de su(s) Hogar(es).
- Encuesta del Área Metropolitana de la Ciudad de México de Ingresos y Gastos de los Hogares. Distribución del Ingreso y el Gasto Corriente Total Trimestral de los Hogares, 1998.
- Encuesta de Ingresos y Gastos de los Hogares del Estado de Tlaxcala, 1992.
- Encuesta Nacional de Ingresos y Gastos de los Hogares, 2000 (ENIGH-2000). Características de las Viviendas por Niveles de Ingreso de su(s) Hogar(es).
- Encuesta Nacional de Ingresos y Gastos de los Hogares, 2000 (ENIGH-2000). Documento Metodológico.
- Encuesta del Estado de Guanajuato de Ingresos y Gastos de los Hogares. Distribución del Ingreso y Gasto Corriente Total Trimestral de los Hogares, 1998.
- Encuesta de Ingresos y Gastos de los Hogares en los Estados. Distribución del Ingreso y Gasto Corriente Total Trimestral de los Hogares, 1996 (serie para las entidades de Campeche, Coahuila, Distrito Federal, Guanajuato, Hidalgo, Jalisco, Estado de México, Oaxaca y Tabasco).
- Encuesta del Estado de Veracruz-Llave de Ingresos y Gastos de los Hogares. Distribución del Ingreso y Gasto Corriente Total Trimestral de los Hogares, 2000.
- Encuesta Nacional de Ingresos y Gastos de los Hogares, 1996. Tabulados y Base de Datos 1992, 1994 y 1996; Módulo de Deportes, Turismo y Uso del Tiempo, 1996 (disco compacto).
- Encuesta Nacional de Ingresos y Gastos de los Hogares. ENIGH-2002.
- Síntesis Metodológica de la Encuesta Nacional de Ingresos y Gastos de los Hogares.

### Poverty and Income Distribution

According to the results of the 2000 survey as published by the INEGI, the Gini coefficient based on monetary current quarterly income of households in the whole national territory decreased from 0.5092 in 1998 to 0.5030 in 2000.

Survey year	Gini coefficient	
	Total quarterly current income	Monetary quarterly current income
1992	0.4749	0.5086
1994	0.4770	0.5137
1996	0.4539	0.4885
1998	0.4761	0.5092
2000	0.4811	0.5030
2002	0.4541	0.4789