

# 47th United Nations Statistical Commission

## *Methodological Developments for Gender Statistics* *Side event*

Country experiences and key findings from the  
implementation of the EDGE project  
(Mexico)



INSTITUTO NACIONAL  
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# Relevance of EDGE project for Mexico

Mexico recognizes EDGE methodology's innovations:

- incorporating the study of assets, not just income, into issues of poverty and gender inequality
- transcending the household, incorporating the individual as unit of analysis for asset ownership and rights

Mexico's become the first National Statistics Office to test MEXA methodology on asset ownership and contribute to the study of entrepreneurship



# EDGE project objectives for Mexico

The pilot objectives are :

- To understand to what extent the design of the EDGE questionnaire clearly conveys the concepts, provides response categories adequate for the target populations, and permits identification of sensitive and difficult questions
- To verify the feasibility of interviewing, according to field research protocols, multiple household members
- To generate UNSD proposed tabulations and indicators



# Module on the Status of Household Assets (1)

- Pilot survey was conducted as an appended module to the National Household Survey (NHS): *Module on the Status of Household Assets* (MSBH for its Spanish acronym).
- It does not cover all EDGE topics and concepts because other household surveys such as ENOE, ENAMIN and ENIF already contain some questions needed to create UNSD proposed indicators.



# Module on the Status of Household Assets (2)

MSBH questionnaire includes nine topic sections:

- I) Roster of non household members
- II) Agricultural land
- III) Backyard agriculture
- IV) Animal breeding & exploitation
- V) Agricultural equipment
- VI) Other real-estate
- VII) Financial assets (savings)
- VIII) Liabilities (credits)
- IX) Entrepreneurship



# Main differences between MSBH and EDGE questionnaire\* (1)

- MSBH includes questions about the conditions in which the respondent may decide to sell or bequeath assets: independently, by agreement with someone, or with the consent of another.
- The module doesn't asked to verify physical documents accrediting legal ownership of household assets, this in order to avoid resistance of respondents or disagreements between household members for and against showing documentation.
- The registration of ownership of a particular asset is allowed for up to 3 household members and one non-household member.



# Main differences between MSBH and EDGE questionnaire\* (2)

- For the following reasons the MSBH does not ask for asset values:
  - The current situation of insecurity in Mexico makes revealing financial information particularly sensitive;
  - The enumerator- informant interactions in this type of survey (NHS) don't generate the level of confidence deemed convenient for disclosure of said information.
  - Certain geographic contexts, rural areas in particular, lack markets by which values can be estimated.
- By the same token, MSBH does not ask about hidden assets



# Main differences between MSBH and EDGE questionnaire\* (3)

- In addition to the different types and forms of ownership, MSBH incorporated questions on measurement of less visible women's contribution to the household economy.
- It explores who in the household can exploit and who is charged with taking care of or preserving the assets.
- The questionnaire integrates questions on use of earnings, the destination and benefits derived from asset use, in the sections on financial assets, liabilities and entrepreneurship.





# Data collection strategy

- Data collection began on 29 June and concluded 2 October 2015, for a total of 14 weeks in the field;
- Simultaneous interviews entailed a sizable increase in operating costs, required hiring and training of additional staff, as such this was not a viable option.
  - Therefore, informants were interviewed individually and separately.
- MSBH did not seek to achieve coincidence between sexes of respondents and interviewers.



# Field work staff

- INEGI has 33 state offices, one for each state and two for Mexico City. A total of 342 people were assigned to carry out EDGE project field work, 132 of whom were enumerators and 38 were state supervisors.
  - Personnel were dispersed among the state offices, with an average of 10 workers per office
- Breakdown of MSBH Enumerators:
  - 78% women, the average age was 38 years old
  - Enumerators had on average of 5 years conducting INEGI surveys
  - 67% with undergraduate studies, mainly in sociology, psychology and communications



# Selected respondents of MSBH

- One purpose of MSBH was to interview two adult members of the principal couple of household. (e.g. head as recognized by others and considered the most important decision-maker.)
- When there was no principal couple, or if one member was not available for interview during field research, the informant should have been supplemented by another adult household member who knew the information requested;
  - When there were multiple adults, an adult of the opposite sex with the birthday nearest to the interview date was selected for interview.



# Survey Sample

- MSBH sample: 8,204 households (a sub-sample of the 16,389 household NHS sample)
- 13,309 members of 7,500 households were interviewed
  - 54% of informants were women
  - 41% of informants were rural (when rural communities are defined as those with fewer than 15,000 inhabitants)
- 704 households (8.6%) were classified as non-responders (300 households rejected participating)



# Accomplishments of MSBH Field Research

- For 85% of households, two adult household members were interviewed and in 6.4% one adult interview was achieved
- In 4,502 households, both informants were members of the principal couple
- In 7,414 households, at least one informant was member of the principal couple, and only in 76 cases an adult non- member of the principal couple was the sole respondent



# Key findings (1)

An observation guide was applied by a supervisor during 4,276 interviews providing an input for qualitative evaluation of the field research. According to analysis of the observation guide:

- Sixty five percent of observed interviews was obtained in the first contact, 20% of observed interviews was obtained during a second visit.
- Observations guides indicate more than three visits in 15% of households contacted (up to 9 visits).
- In order to obtain an interview, an average of 1.65 visits was made to each household.



# Key findings (2)

- The situations that most affected the efficiency of field research were: the absence of respondents and the length of interviews.
- The least fluid module sections were: IX. Entrepreneurship, VIII. Liabilities (credits) and VII. Financial assets.
- In 318 of observed interviews there were problems with the fluidity. The following 687 factors were registered as affecting the quality of those interviews:

Mistrust/ insecurity	34%	Lack of info	31%
Discomfort with question	14%	Fatigue	12%
Presence or interference of others	8%		



## Key findings (3)

- Reported, documented and economic ownership is ascribed to men across the vast gamut of assets studied, with a more exacerbated unequal asset distribution in rural areas.
- Legal documentation of ownership is less significant as a source of rights/power accruing to the owner: the incidence of economic owners is greater than that of reported owners, and there are more reported than documented owners.
- Rights to sell and bequeath also principally belong to men, however the gender gap is smaller for the right to bequeath.
- In categories of animal asset ownership, gender asset ownership differences were found: women tend to be principal owners of poultry and pigs.





# Key findings (4)

- In rural as well as urban areas, a greater proportion of women are entrepreneurs
- Either due to preferences or issues of financial inclusion, gender related differences are exhibited in regards to possession of financial assets, to save men are more likely to use banks and women ROSCA's<sup>1</sup>.
- Backyard agriculture also falls on women's shoulders, but for more than any other instance of asset management, women also accrue the benefits of that work
- <sup>1</sup> *Rotating Credit And Savings Association*



# Main realizations/ insights (1)

- Women and first informants were perceived more as responsive and interested in the module.
- Non-simultaneous interviews seem not to affect responses for either gender.
- Enumerator experience and technique, not a match between informant and enumerator sexes, was the basis for successful interviews.
- A section- roster for non-household members isn't necessary. Codes should be provided for identifying non-household owners' gender and relationship with the respondent.



# Main realizations/insights (2)

- It's necessary to reconsider in which question areas respondent non-owners should not answer (e.g. savings and liabilities)
- Providing a range of asset values worked well for dwellings, this could be tested for other assets
- Categories of determinants and constraints for starting a business should be adjusted to better grasp the nature of small or precarious enterprises.
- In some cases, it could be better to emphasize the quality rather than quantity of an asset (e.g. irrigation infra-structure versus land area; inclusion in formal savings systems versus amount of savings, debt burden versus credit amount)



# Main realizations/insights (3)

- The questionnaire should be adjusted for groups or categories of animals and agricultural equipment (suitable for a household survey)
- The questions on the rights to sell and bequeath assets may present difficulties when owners are still paying off the assets.
- It's important to establish a time period for registry of information about financial assets and liabilities.
- The liabilities section should be located before that of financial assets because discussion of debt provides a caveat into more private issues of savings.





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