

# **The Need for Farmworker Housing in Florida**

May 28, 2013

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## Executive Summary

### Farmworker Population and Household Estimates

An estimated 104,759 farmworkers work in crop agriculture in Florida over the course of one year. Thirty-seven percent, or 38,761, are estimated to be migrant workers, and 63 percent, or 65,998, are estimated to be seasonal workers.

Farmworkers may be classified as accompanied or unaccompanied. Accompanied farmworkers are those living with a spouse, children, or parents, or minor farmworkers living with a sibling. An estimated 23 percent of migrant farmworkers and 57 percent of seasonal farmworkers in Florida are accompanied. In all, Florida has a total of 91,423 farmworker households with 184,322 household members.

	Unaccompanied Worker Households	Accompanied Worker Households	Total Households	Unaccompanied Worker Household Members	Accompanied Worker Household Members	Total Household Members
<b>Migrant</b>	29,846	5,537	35,383	29,846	19,879	49,725
<b>Seasonal</b>	28,379	27,661	56,040	28,379	106,218	134,597
<b>Total</b>	58,225	33,198	91,423	58,225	126,097	184,322

Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

The following 12 counties have the largest farmworker populations: Hillsborough, Miami-Dade, Palm Beach, Manatee, Hendry, Collier, Orange, Indian River, Lee, Polk, Highlands, and Volusia. Combined, these counties contain 81 percent of the state's farmworkers.

### Incomes and Affordable Rent Ranges for Farmworker Households

Unaccompanied migrant farmworkers fall most frequently into the lowest income groups, with 54 percent earning less than \$10,000 per year. Unaccompanied seasonal workers have somewhat higher incomes, with 78 percent earning \$10,000-25,000 per year and an additional 9 percent earning more than \$25,000 per year. Therefore, nearly 35 percent of all unaccompanied farmworkers need single-person units or beds with rents below \$333 per month, with an additional 32 percent in need of units with rents below \$500 per month.

Accompanied farmworker households tend to have higher incomes than unaccompanied farmworkers. Among accompanied migrant workers, 7 percent earn less than \$10,000 per year, 57 percent earn \$10,000-25,000 per year, and 36 percent earn \$25,000 per year or more. Among accompanied seasonal worker households, four percent earn less than \$10,000 per year, 50 percent earn \$10,000-25,000 per year, and 46 percent earn \$25,000 per year or more.

Many accompanied farmworker families also need housing units with rents well below the market rate, with 21 percent requiring units with rents of \$500 per month or less. However, 44 percent of accompanied farmworker families can afford rents in the \$834 and above range.

## **Farmworker Housing Supply**

There are 7,763 farmworker housing units in multifamily developments with funding from the U.S. Department of Agriculture Rural Development (RD) Section 514 and 516 programs, from Florida Housing-allocated SAIL, HOME, and tax credit resources, or both. Florida Department of Health (DOH) permitted camps supply an additional 33,290 unduplicated beds for unaccompanied workers.

## **Need Estimate: Comparison of Supply and Farmworker Households**

The total gap between the number of single worker beds needed and the number of unaccompanied farmworkers is 24,935 beds. Nine counties have an unmet need for single worker housing exceeding 1,000 beds: Miami-Dade, Hillsborough, Orange, Indian River, Manatee, Hendry, Volusia, Lake, and Lee. The total gap between the number of multifamily units and the number of accompanied farmworker households is 25,435 units. The seven counties with unmet need for multifamily farmworker units exceeding 1,000 units are Hillsborough, Miami-Dade, Palm Beach, Manatee, Orange, Hendry, and Indian River.

# 1. Introduction

This section of the housing needs assessment discusses the need for rental housing for migrant and seasonal farmworkers in Florida's counties. Farmworkers may or may not be accompanied by immediate family members, and unaccompanied farmworkers have different housing needs and incomes than accompanied farmworkers. Therefore, this analysis examines the number of accompanied and unaccompanied farmworker households, the incomes of each group, and the number of housing units appropriate to each group.

The analysis is divided into six sections:

- Methodology
- Farmworker Population and Household Estimates
- Incomes and Affordable Rent Ranges for Farmworker Households
- Farmworker Housing Supply
- Need Estimate: Comparison of Supply and Households
- Data Limitations

As noted in the Methodology section below, part of the needs assessment is based on 2005-2008 data from the National Agricultural Workers Survey (NAWS) on farmworkers' average weeks worked, migrant vs. seasonal worker status, and demographic characteristics. Use of the older data is necessary because of a delay in the release of current data from the U.S. Department of Labor. We strongly recommend updating the farmworker housing needs assessment later this year when data from the 2010-2012 NAWS become available.

## 2. Methodology

### Demand

#### Estimating Farmworkers for State and Counties

The total numbers of farmworkers in the state and in each county are derived from two sources: the Bureau of Labor Statistics' Quarterly Census of Employment and Wages (QCEW) and the Department of Labor's National Agricultural Workers Survey (NAWS).

- QCEW: The QCEW "produces a comprehensive tabulation of employment and wage information for workers covered by State unemployment insurance (UI) laws" by industry, including total annual wages and average weekly wages.<sup>1</sup> The QCEW records information for each "establishment," defined as "the physical location of a certain economic activity--for example, a factory, mine, store, or office. A single establishment generally produces a single good or provides a single service."<sup>2</sup>

QCEW data are available by state and county as well as by NAICS (North American Industry Classification, formerly SIC) industrial code. 2011 is the most recent year for which full data are publicly available. This analysis considers employment in two NAICS codes: 111, "Crop Production," and 11511, "Support Activities for Crop Production." These classifications include farms, orchards, groves, greenhouses and nurseries.

- NAWS: The NAWS "is an employment-based, random survey of the demographic and employment characteristics of the U.S. crop labor force" produced by the U.S. Department of Labor. It includes information about the demographic characteristics of workers and their households, employment history, and migration patterns.<sup>3</sup> Susan Gabbard, of JBS International, provided special tabulations of the NAWS data for this report.

We calculated the total number of farmworkers for the state of Florida and each county by a three-step process:

1. Use the QCEW data to calculate the total number of weeks worked by workers in NAICS codes 111 and 11511. For each code and geographic area,

Total number of weeks worked = 
$$\frac{\text{Total annual wages}}{\text{Average weekly wage}}$$

For example, in Indian River County in 2011, the total annual wages for NAICS code 111 were \$18,345,000. The average weekly wage for this industrial code was \$525. Dividing \$18,345,000 by \$525

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<sup>1</sup> United States Bureau of Labor Statistics. *QCEW Overview*. December 18, 2003. May 6, 2010. <<http://www.bls.gov/cew/cewover.htm>>.

<sup>2</sup> United States Bureau of Labor Statistics. *BLS Glossary*. February 28, 2008. May 6, 2010. <<http://www.bls.gov/bls/glossary.htm>>.

<sup>3</sup> United States Department of Labor Employment and Training Administration. *The National Agricultural Workers Survey*. January 11, 2010. May 7, 2010. <http://www.doleta.gov/agworker/naws.cfm>.

yields 34,943 weeks worked in 2011 in NAICS code 111 for Indian River County. In the same county, the total annual wages for code 11511 were \$43,244,000. The average weekly wage was \$418. Dividing \$43,244,000 by \$418 yields 103,455 weeks worked.

2. Use the NAWS data to calculate the number of workers required to work that number of weeks in one year.

The NAWS shows that farmworkers in Florida worked an average of 36 weeks during 2008, the most recent year of data available to the Shimberg Center. This allows us to translate the total number of weeks worked in a geographic area and NAICS code into an estimated number of workers:

$$\text{Workers} = \frac{\text{Total annual weeks worked}}{\text{Average weeks worked per year}} = \frac{\text{Total annual weeks worked}}{36}$$

In the Indian River County example, for NAICS code 111, dividing 34,943 weeks worked by 36 weeks per worker yields 971 workers. For NAICS code 11511, dividing 103,455 weeks worked by 36 weeks per worker yields 2,873 workers.

3. Sum the total workers for the two industrial codes in each geographic area.

Total farmworkers = Workers in code 111 + Workers in code 11511

For Indian River County, total farmworkers = 971 + 2,873 = 3,844

Using the QCEW to distribute farmworkers among counties introduces an error into the distribution. In this report, the sum of the number of farmworkers in all counties is lower than the statewide total. This is also true for the numbers of farmworker households and household members, which are derived directly from the number of farmworkers. This disparity has two causes. First, the QCEW includes a category of employment establishments for which counties cannot be identified based on data submitted by employers. Only 49 farmworkers in Florida fall into the "County Unknown" category. For Tables 5-7, which list farmworkers, farmworker households, and farmworker household members, these farmworkers and their associated household and household members are counted in a "County Unknown" row. However, these workers, households and household members are not included in the county list for Table 12, which identifies housing need by comparing demand and supply, or in any of the maps.

Second, the Bureau of Labor Statistics suppresses wage data for establishments in some counties in order to protect confidentiality, but includes the data in statewide totals. In these counties, the number of farmworkers is actually higher than the figures reported in this report. Statewide, this results in 17,158 farmworkers (16 percent) included in the state total that are not attributed to any county or to the "County Unknown" category. To account for those workers, we redistributed the 17,158 workers among the counties and the "County Unknown" category based on the counties' share of the 87,601 workers for whom a county (or "County Unknown") designation could be identified using the QCEW and NAWS data. For example, the QCEW/NAWS method resulted in an estimate of 3,844 workers for Hendry County, which equals 4.39% of 87,601. We added 753 workers ( $17,158 * .0439$ ) to Indian River County's total as that county's portion of the state total that had been suppressed in the county-level data, for a total of 4,597 workers. However, this likely results in an underestimate of workers in some counties and an overestimate in others, since the wages and therefore workers at the suppressed establishments are unlikely to match the county-level distribution of wages and workers at other establishments.

## Farmworker Demographic and Household Characteristics

We used data from the NAWS to identify characteristics of farmworkers and their households. Because the annual NAWS sample size is small, we used the NAWS interviews with individuals collected over a four-year period. As noted earlier, available NAWS data are older (fiscal years 2005 - 2008). We strongly recommend updating the farmworker estimates and household characteristics when new data become available from the U.S. Department of Labor later this year.

Results reflect interviews with 824 individuals regarding these characteristics:

- *Migrant vs. seasonal workers:* The NAWS defines a “migrant” as a person traveling more than 75 miles to find farm work. “Seasonal” workers also perform labor in crop agriculture but do not make this migration.
- *Accompanied vs. unaccompanied workers:* Accompanied farmworkers are those living with a spouse, children, or parents, or minor farmworkers living with a sibling. Unaccompanied farmworkers are those who do not live with immediate family.
- *Household size and number of farmworkers in household for accompanied workers:* By definition, accompanied worker households include more than one person. They may also include more than one farmworker.
- *Annual household income:* We used the NAWS to determine income distributions for unaccompanied migrant worker households, unaccompanied seasonal worker households, accompanied migrant worker households and accompanied seasonal worker households. For accompanied worker households, household income may include contributions from more than one farmworker, and it may also include income from family members engaged in types of work other than agriculture.

The estimates of household income were complicated in two ways as a result of NAWS data collection practices. The NAWS survey asks farmworkers, “What was your family’s total income *last year* in USA dollars?” (emphasis added). First, for four percent of workers surveyed, data are missing. To account for these workers, we have assumed that they would be distributed among the different income categories in proportion to each category’s share of total workers. For example, if 15 percent of workers other than the missing workers reported incomes between \$7,500 and \$9,999, we added 15 percent of the missing workers to that category. Second, approximately seven percent of workers surveyed—including 18 percent of unaccompanied migrant workers—responded that their family incomes were below \$1,000, with most of these responding that their incomes were below \$500. It is unlikely that most of these answers actually represent family incomes earned while the workers were performing farm work in Florida. More likely, these workers are new to the U.S. or to farm work and are reporting previous years’ incomes that do not include farm work. Therefore, we made the assumption that these amounts did not reflect a full year’s income. We redistributed these workers to the other income categories based on the other categories’ share of the state total, the same method by which we redistributed the workers with missing data.

## Supply

This report tallies two sources of farmworker housing: state- and federally-assisted housing units and Department of Health-permitted camps.

First, a number of multifamily developments in the state receive state subsidies, federal subsidies, or both in order to serve low-income farmworker households. The Florida Housing Finance Corporation (Florida Housing) allocates some of its SAIL, HOME, and housing tax credit resources to multifamily developments designed to house farmworkers. In addition, a number of multifamily housing complexes receive development subsidies from the U.S. Department of Agriculture's Rural Development (RD) program to provide housing for farmworker families under the Section 514 and 516 programs. Data on properties subsidized by these programs come from the Shimberg Center's Assisted Housing Inventory (AHI). The AHI receives data from Florida Housing and the RD program and records all units for which farmworkers are the target population.

Second, the Florida Department of Health (DOH) issues permits for camps to house unaccompanied migrant and seasonal farmworkers. These "camps" may consist of single-family homes, mobile homes, motels, multifamily units, or dormitory-style arrangements. The camps are inspected by county departments of public health, which report the camps' occupancy levels annually to DOH. We received records from DOH that include county location and occupancy for each camp. Therefore, as the figures in this report reflect a snapshot of camps' occupancy rather than their potential capacity, it is possible that there is additional unused camp capacity available in some counties.

### 3. Farmworker Population and Household Estimates

To determine the number of farmworker housing units needed and the number of people they must accommodate, this section makes estimates of the following:

- *Farmworkers*: individuals performing farm work in Florida or living in Florida when not migrating to other states to perform farm work.
- *Farmworker households*: individuals or family groups living together including at least one farmworker; many farmworker households include more than one farmworker.
- *Farmworker household members*: all of the individuals living in a farmworker household, regardless of whether they themselves perform farm work.

As described in the following section, farmworkers may be migrant or seasonal, with the National Agricultural Workers Survey (NAWS) defining a "migrant" as a person traveling more than 75 miles to find farm work. Seasonal workers also perform labor in crop agriculture but do not make this migration. Because migrant and seasonal workers have different household characteristics, we make separate estimates of the numbers of farmworkers, households, and household members in each of these categories.

An estimated 104,759 farmworkers worked in crop agriculture in Florida in 2011, the most recent year for which full data are available. These include greenhouse and nursery workers as well as field crop workers.

In the NAWS, 37 percent of farmworkers surveyed in Florida fit the definition of migrant workers. The estimated numbers of migrant and seasonal farmworkers in the state of Florida are summarized in Table 1.

**Table 1. Migrant and Seasonal Workers in Florida, 2011**

Migrant Workers	Seasonal Workers	Total
38,761	65,998	104,759

Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005 - 2008.

#### **Accompanied vs. Unaccompanied Farmworkers**

In addition to the migrant/seasonal distinction, farmworkers may be accompanied or unaccompanied. Accompanied farmworkers are those living with a spouse, children, or parents, or minor farmworkers living with a sibling. Unaccompanied farmworkers are those who do not live with immediate family. According to the NAWS, 23 percent of migrant farmworkers are accompanied. Seasonal farmworkers are more likely to be accompanied; 57 percent of seasonal farmworkers in Florida are accompanied. Applying these percentages to the estimate of total farmworkers yields the estimates for Florida as listed in Table 2.

**Table 2. Unaccompanied and Accompanied Farmworkers in Florida, 2011**

	Unaccompanied Workers	Accompanied Workers
<b>Migrant</b>	29,846	8,915
<b>Seasonal</b>	28,379	37,619
<b>TOTAL</b>	58,225	46,534

Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

An analysis of farmworker housing needs must also take into account the needs of families living with the farmworker. According to the NAWS, the average household size is 3.59 members for accompanied migrant workers and 3.84 members for accompanied seasonal workers. Moreover, a household may contain more than one farmworker. The NAWS found that an average of 1.61 farmworkers lived in each household containing accompanied migrant workers and an average of 1.36 farmworkers lived in each household containing accompanied seasonal workers. Table 3 displays the estimated numbers of accompanied farmworker households and household members.

**Table 3. Accompanied Farmworkers and Their Households in Florida, 2011**

	Accompanied Workers	Households (Workers/Average Workers per Household)	Household Members (Households * Average Members per Household)
<b>Migrant</b>	8,915	5,537	19,879
<b>Seasonal</b>	37,619	27,661	106,218
<b>TOTAL</b>	46,534	33,198	126,097

Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

Since unaccompanied workers do not have other members of their immediate families living with them, each worker forms a household of one. Thus, the number of unaccompanied worker households equals the number of unaccompanied workers. Combining the number of unaccompanied workers in Table 2 and the numbers of accompanied worker households and household members in Table 3 yields the total number of farmworker households and household members in Florida in Table 4.

**Table 4. Farmworker Households and Household Members in Florida, 2011**

	Unaccompanied Worker Households	Accompanied Worker Households	Total Households	Unaccompanied Worker Household Members	Accompanied Worker Household Members	Total Household Members
<b>Migrant</b>	29,846	5,537	35,383	29,846	19,879	49,725
<b>Seasonal</b>	28,379	27,661	56,040	28,379	106,218	134,597
<b>Total</b>	58,225	33,198	91,423	58,225	126,097	184,322

Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

In sum, Florida has 91,423 farmworker households with 184,322 household members.

## **Estimating Farmworker Population, Households, and Household Members by County**

Table 5 shows the numbers of unaccompanied migrant and seasonal workers by county. Table 6 shows the number of accompanied workers, accompanied worker households, and accompanied worker household members for migrant and seasonal workers by county.

Table 7 shows the total numbers of farmworkers, farmworker households, and farmworker household members by county, regardless of migrant/seasonal status. Figure 1 is a map showing the distribution of all farmworkers by county

The counties with more than 2,500 farmworkers are Hillsborough, Miami-Dade, Palm Beach, Manatee, Hendry, Collier, Orange, Indian River, Lee, Polk, Highlands, and Volusia. Combined, these counties contain 81 percent of the state's farmworkers.

**Table 5. Unaccompanied Farmworkers by County, 2011**

County	Unaccompanied Migrant Workers	Unaccompanied Seasonal Workers	Total Unaccompanied Workers
Alachua	311	296	607
Baker	0	0	0
Bay	0	0	0
Bradford	0	0	0
Brevard	47	44	91
Broward	349	332	680
Calhoun	58	55	112
Charlotte	204	194	399
Citrus	49	46	95
Clay	11	10	21
Collier	1,793	1,705	3,497
Columbia	41	39	80
DeSoto	655	623	1,279
Dixie	12	11	23
Duval	0	0	0
Escambia	0	0	0
Flagler	50	48	98
Franklin	0	0	0
Gadsden	505	480	986
Gilchrist	19	18	37
Glades	21	20	41
Gulf	0	0	0
Hamilton	40	38	77
Hardee	302	288	590
Hendry	1,916	1,822	3,739
Hernando	64	60	124
Highlands	747	711	1,458
Hillsborough	4,993	4,748	9,741
Holmes	0	0	0
Indian River	1,310	1,245	2,555
Jackson	31	30	61
Jefferson	59	56	115
Lafayette	22	21	42
Lake	676	643	1,319
Lee	893	849	1,741
Leon	38	36	75
Levy	98	93	191
Liberty	0	0	0
Madison	20	19	38
Manatee	2,334	2,219	4,553
Marion	125	119	245
Martin	192	182	374
Miami-Dade	3,848	3,659	7,507
Monroe	0	0	0
Nassau	0	0	0

County	Unaccompanied Migrant Workers	Unaccompanied Seasonal Workers	Total Unaccompanied Workers
Okaloosa	0	0	0
Okeechobee	160	152	312
Orange	1,615	1,535	3,150
Osceola	94	89	183
Palm Beach	3,071	2,921	5,992
Pasco	171	163	334
Pinellas	13	12	25
Polk	890	846	1,735
Putnam	186	176	362
St. Johns	281	267	548
St. Lucie	236	225	461
Santa Rosa	63	60	123
Sarasota	92	88	180
Seminole	81	77	158
Sumter	120	114	233
Suwannee	201	191	392
Taylor	0	0	0
Union	0	0	0
Volusia	718	682	1,400
Wakulla	0	0	0
Walton	0	0	0
Washington	9	8	17
County Unknown	14	13	27
<b>State of Florida Total</b>	<b>29,846</b>	<b>28,379</b>	<b>58,225</b>

Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

**Table 6. Accompanied Farmworkers, Households, and Household Members by County, 2011**

County	Accompanied Migrant Workers	Accompanied Seasonal Workers	Total Accompanied Workers	Accompanied Migrant Households	Accompanied Seasonal Households	Total Accompanied Households	Accompanied Migrant Household Members	Accompanied Seasonal Household Members	Total Accompanied Household Members
Alachua	93	392	485	58	288	346	207	1,107	1,314
Baker	0	0	0	0	0	0	0	0	0
Bay	0	0	0	0	0	0	0	0	0
Bradford	0	0	0	0	0	0	0	0	0
Brevard	14	59	73	9	43	52	31	166	197
Broward	104	440	544	65	323	388	232	1,241	1,474
Calhoun	17	73	90	11	53	64	38	205	243
Charlotte	61	258	319	38	189	227	136	727	863
Citrus	15	61	76	9	45	54	32	173	206
Clay	3	14	17	2	10	12	7	39	46
Collier	535	2,260	2,795	333	1,661	1,994	1,194	6,380	7,574
Columbia	12	52	64	8	38	46	27	147	174
DeSoto	196	826	1,022	122	607	729	437	2,332	2,769
Dixie	4	15	19	2	11	13	8	43	51
Duval	0	0	0	0	0	0	0	0	0
Escambia	0	0	0	0	0	0	0	0	0
Flagler	15	63	78	9	46	56	33	178	212
Franklin	0	0	0	0	0	0	0	0	0
Gadsden	151	637	788	94	468	562	337	1,798	2,135
Gilchrist	6	24	30	4	18	21	13	68	80
Glades	6	26	32	4	19	23	14	74	88
Gulf	0	0	0	0	0	0	0	0	0
Hamilton	12	50	62	7	37	44	26	141	167
Hardee	90	381	472	56	280	336	201	1,077	1,278
Hendry	572	2,416	2,988	356	1,776	2,132	1,276	6,820	8,097
Hernando	19	80	99	12	59	71	42	226	269
Highlands	223	942	1,165	139	693	831	498	2,660	3,158
Hillsborough	1,491	6,294	7,785	926	4,628	5,554	3,326	17,770	21,096
Holmes	0	0	0	0	0	0	0	0	0

County	Accompanied Migrant Workers	Accompanied Seasonal Workers	Total Accompanied Workers	Accompanied Migrant Households	Accompanied Seasonal Households	Total Accompanied Households	Accompanied Migrant Household Members	Accompanied Seasonal Household Members	Total Accompanied Household Members
Indian River	391	1,651	2,042	243	1,214	1,457	872	4,661	5,534
Jackson	9	39	48	6	29	35	21	110	131
Jefferson	18	74	92	11	55	65	39	209	248
Lafayette	6	27	34	4	20	24	14	77	91
Lake	202	852	1,054	125	627	752	450	2,407	2,857
Lee	267	1,125	1,392	166	827	993	595	3,177	3,771
Leon	11	48	60	7	35	42	25	136	161
Levy	29	123	153	18	91	109	65	349	414
Liberty	0	0	0	0	0	0	0	0	0
Madison	6	25	31	4	18	22	13	70	83
Manatee	697	2,942	3,639	433	2,163	2,596	1,555	8,306	9,861
Marion	37	158	196	23	116	140	84	447	530
Martin	57	241	299	36	178	213	128	682	809
Miami-Dade	1,149	4,850	6,000	714	3,566	4,280	2,563	13,695	16,258
Monroe	0	0	0	0	0	0	0	0	0
Nassau	0	0	0	0	0	0	0	0	0
Okaloosa	0	0	0	0	0	0	0	0	0
Okeechobee	48	202	250	30	148	178	107	570	677
Orange	482	2,035	2,517	300	1,496	1,796	1,075	5,746	6,821
Osceola	28	118	146	17	87	104	62	334	396
Palm Beach	917	3,871	4,789	570	2,847	3,416	2,046	10,931	12,977
Pasco	51	216	267	32	159	190	114	609	723
Pinellas	4	16	20	2	12	14	8	45	53
Polk	266	1,121	1,387	165	824	989	593	3,166	3,758
Putnam	55	234	289	34	172	206	124	660	784
St. Johns	84	354	438	52	260	312	187	999	1,186
St. Lucie	71	298	369	44	219	263	157	842	999
Santa Rosa	19	80	98	12	58	70	42	225	267
Sarasota	28	116	144	17	86	103	61	328	390
Seminole	24	102	127	15	75	90	54	289	343
Sumter	36	151	186	22	111	133	80	425	505
Suwannee	60	254	314	37	186	224	134	716	850

County	Accompanied Migrant Workers	Accompanied Seasonal Workers	Total Accompanied Workers	Accompanied Migrant Households	Accompanied Seasonal Households	Total Accompanied Households	Accompanied Migrant Household Members	Accompanied Seasonal Household Members	Total Accompanied Household Members
Taylor	0	0	0	0	0	0	0	0	0
Union	0	0	0	0	0	0	0	0	0
Volusia	214	905	1,119	133	665	798	478	2,554	3,032
Wakulla	0	0	0	0	0	0	0	0	0
Walton	0	0	0	0	0	0	0	0	0
Washington County Unknown	3	11	13	2	8	10	6	31	37
	4	18	22	3	13	16	9	50	59
<b>State of Florida Total</b>	<b>8,915</b>	<b>37,619</b>	<b>46,534</b>	<b>5,537</b>	<b>27,661</b>	<b>33,198</b>	<b>19,879</b>	<b>106,218</b>	<b>126,097</b>

Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

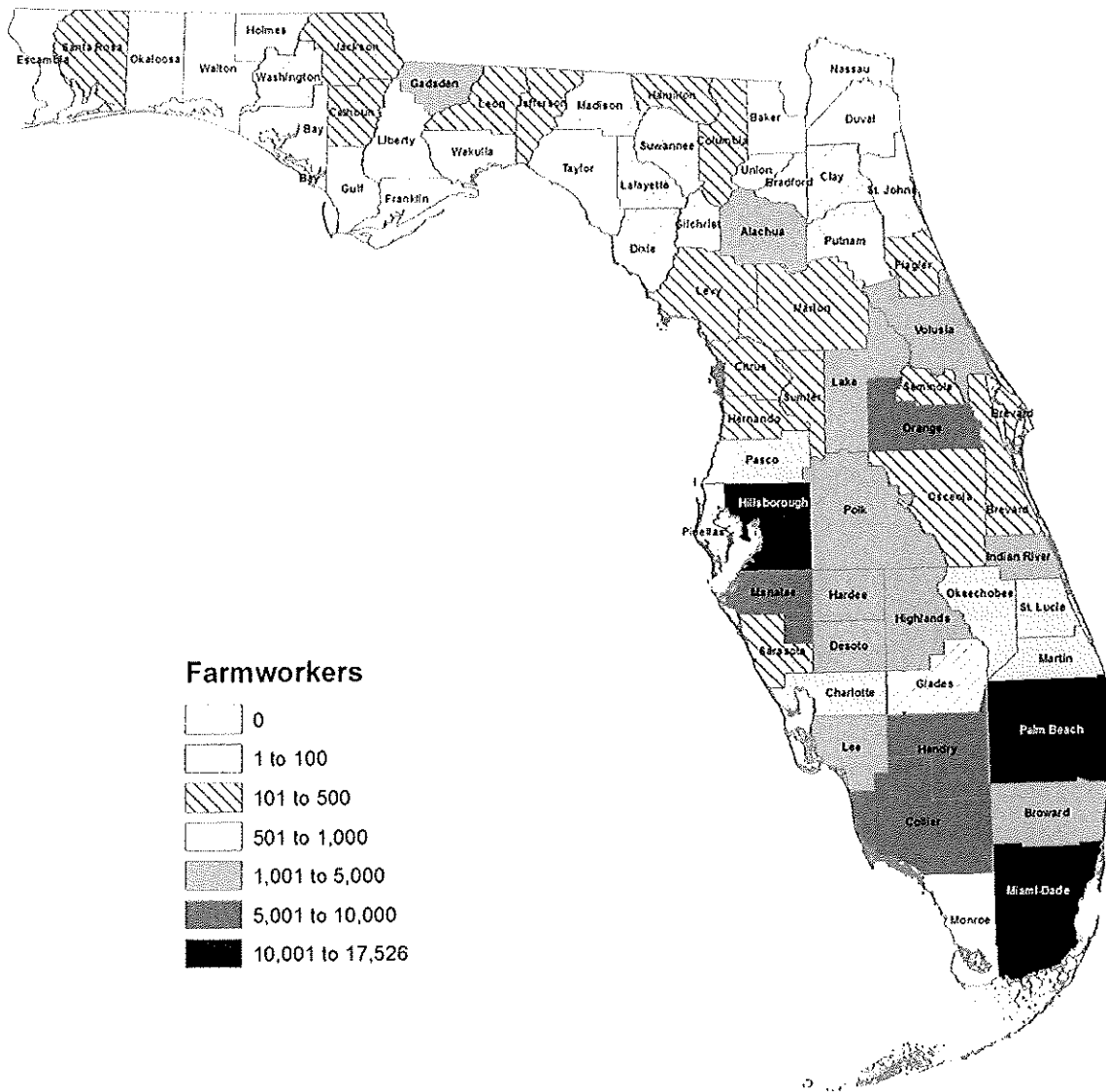
**Table 7. Total Farmworkers, Households, and Household Members by County, 2011**

County	Percentage of State's Farmworkers	Total Farmworkers	Total Farmworker Households	Total Farmworker Household Members
Alachua	1.04%	1,092	953	1,921
Baker	0.00%	0	0	0
Bay	0.00%	0	0	0
Bradford	0.00%	0	0	0
Brevard	0.16%	164	143	288
Broward	1.17%	1,224	1,068	2,154
Calhoun	0.19%	202	176	356
Charlotte	0.68%	717	626	1,262
Citrus	0.16%	171	149	301
Clay	0.04%	38	33	67
Collier	6.01%	6,292	5,491	11,071
Columbia	0.14%	145	126	254
DeSoto	2.20%	2,300	2,008	4,048
Dixie	0.04%	42	37	74
Duval	0.00%	0	0	0
Escambia	0.00%	0	0	0
Flagler	0.17%	176	154	310
Franklin	0.00%	0	0	0
Gadsden	1.69%	1,773	1,548	3,120
Gilchrist	0.06%	67	58	117
Glades	0.07%	73	64	128
Gulf	0.00%	0	0	0
Hamilton	0.13%	139	121	245
Hardee	1.01%	1,062	927	1,868
Hendry	6.42%	6,727	5,870	11,836
Hernando	0.21%	223	195	393
Highlands	2.50%	2,624	2,290	4,616
Hillsborough	16.73%	17,526	15,295	30,837
Holmes	0.00%	0	0	0
Indian River	4.39%	4,597	4,012	8,089
Jackson	0.10%	109	95	192
Jefferson	0.20%	206	180	363
Lafayette	0.07%	76	66	134
Lake	2.27%	2,374	2,072	4,177
Lee	2.99%	3,133	2,734	5,513
Leon	0.13%	134	117	236
Levy	0.33%	344	300	605
Liberty	0.00%	0	0	0
Madison	0.07%	69	60	121
Manatee	7.82%	8,192	7,149	14,414
Marion	0.42%	440	384	775
Martin	0.64%	672	587	1,183
Miami-Dade	12.89%	13,506	11,787	23,764
Monroe	0.00%	0	0	0
Nassau	0.00%	0	0	0
Okaloosa	0.00%	0	0	0

County	Percentage of State's Farmworkers	Total Farmworkers	Total Farmworker Households	Total Farmworker Household Members
Okeechobee	0.54%	562	491	989
Orange	5.41%	5,667	4,946	9,971
Osceola	0.31%	329	287	579
Palm Beach	10.29%	10,781	9,408	18,969
Pasco	0.57%	601	524	1,057
Pinellas	0.04%	44	39	78
Polk	2.98%	3,122	2,725	5,494
Putnam	0.62%	651	568	1,146
St. Johns	0.94%	985	860	1,733
St. Lucie	0.79%	830	724	1,460
Santa Rosa	0.21%	221	193	390
Sarasota	0.31%	324	283	570
Seminole	0.27%	285	249	501
Sumter	0.40%	420	366	738
Suwannee	0.67%	706	616	1,242
Taylor	0.00%	0	0	0
Union	0.00%	0	0	0
Volusia	2.40%	2,519	2,198	4,432
Wakulla	0.00%	0	0	0
Walton	0.00%	0	0	0
Washington	0.03%	30	27	53
County Unknown	0.05%	49	43	87
<b>State of Florida Total</b>		<b>104,759</b>	<b>91,423</b>	<b>184,322</b>

Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

Figure 1. Farmworkers by County, 2011



Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

## 4. Incomes and Affordable Rent Ranges for Farmworker Households

We used NAWS data to estimate the breakdown of farmworker households by family income range to determine how much the households can afford to pay in rent. In general, unaccompanied farmworker households tend to have lower incomes than accompanied farmworker households. Accompanied farmworkers may have several workers living in their households who contribute income from farm labor or other types of work.

Even with the workers reporting incomes below \$1,000 redistributed to other categories (see “Methodology”), unaccompanied migrant farmworkers fall most frequently into the lowest income groups, with 54 percent earning less than \$10,000 per year and only five percent with incomes of \$25,000 or greater. Unaccompanied seasonal workers have somewhat higher incomes, with 78 percent earning \$10,000-25,000 per year and an additional 9 percent earning more than \$25,000 per year. Table 8 below shows the distribution of unaccompanied migrant and seasonal workers within income ranges. Assuming that households can pay no more than 40 percent of gross income for rent, Table 8 also shows the rent that would be considered “affordable” for each income range.<sup>4</sup>

**Table 8. Incomes and Affordable Rents for Unaccompanied Farmworkers, 2011**

Annual Family Income	Affordable Monthly Rent Range	Unaccompanied Migrant Worker Household	Unaccompanied Seasonal Worker Households	Total Unaccompanied Worker Households
\$1,000 to \$2,499	\$33 to \$83	2,603	17	2,620
\$2,500 to \$4,999	\$84 to \$167	2,807	1,204	4,010
\$5,000 to \$7,499	\$168 to \$250	6,367	1,295	7,661
\$7,500 to \$9,999	\$251 to \$333	4,204	1,133	5,337
\$10,000 to \$12,499	\$334 to \$417	3,130	5,181	8,311
\$12,500 to \$14,999	\$418 to \$500	4,092	6,157	10,249
\$15,000 to \$17,499	\$501 to \$583	1,981	4,616	6,596
\$17,500 to \$19,999	\$584 to \$667	2,348	4,179	6,527
\$20,000 to \$24,999	\$668 to \$833	611	2,104	2,715
\$25,000 to \$29,999	\$834 to \$1,000	426	1,885	2,311
\$30,000 to \$34,999	\$1,001 to \$1,167	1,278	284	1,561
\$35,000 to \$39,999	\$1,168 to \$1,333	0	281	281
Over \$40,000	\$1,334 and above	0	45	45
<b>Total Households</b>		<b>29,846</b>	<b>28,379</b>	<b>58,225</b>

Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

<sup>4</sup> The 2013 Rental Market Study defines “cost burden” as paying more than 40 percent of income for rent, as specified by the Florida Housing Finance Corporation. The “Affordable Monthly Rent Range” column shows the range between 40 percent of the lowest income level and 40 percent of the highest income level in the corresponding “Annual Family Income” range.

As Table 9 shows, accompanied farmworker households tend to have higher incomes than unaccompanied farmworkers. Among accompanied migrant workers, 7 percent earn less than \$10,000 per year, 57 percent earn \$10,000-25,000 per year, and 36 percent earn \$25,000 per year or more. Among accompanied seasonal worker households, only 4 percent earn less than \$10,000 per year, 50 percent earn \$10,000-25,000 per year, and 46 percent earn \$25,000 per year or more.

**Table 9. Incomes and Affordable Rents for Accompanied Farmworker Households, 2011**

Annual Family Income	Affordable Monthly Rent Range	Accompanied Migrant Worker Household	Accompanied Seasonal Worker Households	Total Accompanied Worker Households
\$1,000 to \$2,499	\$33 to \$83	0	0	0
\$2,500 to \$4,999	\$84 to \$167	0	727	727
\$5,000 to \$7,499	\$168 to \$250	0	202	202
\$7,500 to \$9,999	\$251 to \$333	362	271	633
\$10,000 to \$12,499	\$334 to \$417	290	2,556	2,845
\$12,500 to \$14,999	\$418 to \$500	171	2,312	2,483
\$15,000 to \$17,499	\$501 to \$583	1,389	2,227	3,616
\$17,500 to \$19,999	\$584 to \$667	602	1,876	2,478
\$20,000 to \$24,999	\$668 to \$833	702	4,755	5,457
\$25,000 to \$29,999	\$834 to \$1,000	982	2,863	3,846
\$30,000 to \$34,999	\$1,001 to \$1,167	96	2,680	2,776
\$35,000 to \$39,999	\$1,168 to \$1,333	146	3,237	3,383
Over \$40,000	\$1,334 and above	797	3,956	4,753
Total Households		5,537	27,661	33,198

Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011 and United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

These income and rent ranges show that nearly 35 percent of unaccompanied farmworkers need single-person units or beds with rents below \$333 per month, with an additional 32 percent needing units with rents below \$500 per month. Many accompanied farmworker families also need housing units with rents well below the market rate, with one-fifth requiring units with rents of \$500 per month or less. However, 44 percent of accompanied farmworker families can afford rents closer to market rates; i.e., in the \$834 and above range.

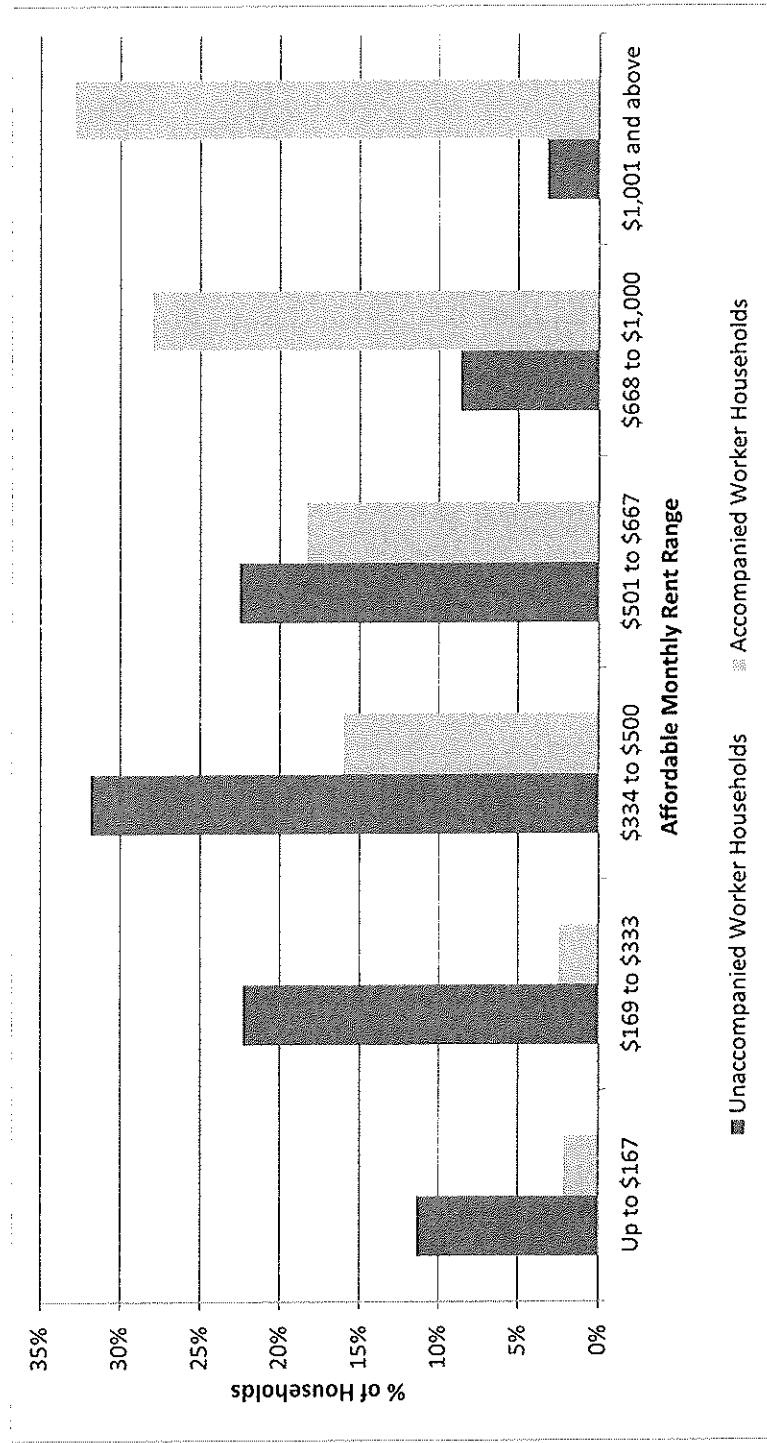
Table 10 and Figure 2 show the percentages of unaccompanied and accompanied farmworker households that are able to afford rents at various levels. Again, note that these numbers likely underestimate the number of accompanied worker households in need of housing in the lowest rent ranges and overestimate the number that can afford housing at higher rents.

**Table 10. Percentage of Unaccompanied and Accompanied Farmworker Households by Affordable Rent Range, 2011**

Affordable Monthly Rent Range	Unaccompanied Worker Households	Accompanied Worker Households
Up to \$167	11%	2%
\$169 to \$333	22%	3%
\$334 to \$500	32%	16%
\$501 to \$667	23%	18%
\$668 to \$1,000	9%	28%
\$1,001 and above	3%	33%

Source: United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008.

Figure 2. Percentage of Unaccompanied and Accompanied Farmworker Households by Affordable Rent Range, 2011



Source: United States Department of Labor, *National Agricultural Workers Survey, 2005-2008*.

## 5. Farmworker Housing Supply

While farmworkers may find a variety of types of housing arrangements, two types of government-licensed or subsidized housing are reserved specifically for farmworkers:

- **State- and federally-subsidized multifamily housing:** The Florida Housing Finance Corporation (Florida Housing) allocates some of its SAIL, HOME, and housing tax credit resources to multifamily developments designed to house farmworkers. In addition, a number of multifamily housing complexes receive development subsidies from the U.S. Department of Agriculture's Rural Development (RD) program to provide housing for farmworker families under the Section 514 and 516 programs. Presently, there are 7,763 farmworker units with these types of financing in operation or under development.
- **Department of Health-permitted camps:** The Florida Department of Health (DOH) issues permits for camps to house unaccompanied migrant and seasonal farmworkers. The current occupancy of DOH-permitted camps is 33,290 beds, similar to the 2010 number of 33,409 beds.

Table 11 lists the supply of these two types of farmworker housing by Florida county.

**Table 11. DOH Permitted Camps and State- and Federally-Assisted Farmworker Housing by County, 2013**

County	RD & Florida Housing Multifamily Units	DOH Permitted Camp Beds
Alachua	0	8
Baker	0	0
Bay	0	0
Bradford	0	0
Brevard	0	0
Broward	174	0
Calhoun	0	0
Charlotte	0	0
Citrus	0	97
Clay	0	0
Collier	1,258	6,854
Columbia	0	0
DeSoto	48	2,485
Dixie	0	0
Duval	0	0
Escambia	0	0
Flagler	0	60
Franklin	0	0
Gadsden	187	48
Gilchrist	0	0
Glades	0	685
Gulf	0	0
Hamilton	0	130
Hardee	172	973
Hendry	360	2,268

County	RD & Florida Housing Multifamily Units	DOH Permitted Camp Beds
Hernando	0	0
Highlands	160	710
Hillsborough	573	5,370
Holmes	0	0
Indian River	431	314
Jackson	0	0
Jefferson	0	0
Lafayette	0	0
Lake	136	100
Lee	246	544
Leon	0	344
Levy	0	0
Liberty	0	0
Madison	0	0
Manatee	208	2,619
Marion	124	0
Martin	117	5
Miami-Dade	1,608	176
Monroe	14	0
Nassau	0	0
Okaloosa	0	0
Okeechobee	115	181
Orange	0	30
Osceola	0	160
Palm Beach	918	6,307
Pasco	102	561
Pinellas	0	0
Polk	517	1,576
Putnam	52	60
Saint Johns	0	269
Saint Lucie	104	60
Santa Rosa	0	0
Sarasota	78	0
Seminole	0	0
Sumter	0	0
Suwannee	0	288
Taylor	0	0
Union	0	8
Volusia	61	0
Wakulla	0	0
Walton	0	0
Washington	0	0
<b>State of Florida Total</b>	<b>7,763</b>	<b>33,290</b>

Sources: Florida Department of Health; Shimberg Center for Housing Studies, Assisted Housing Inventory.

Nine counties have at least 200 RD/Florida Housing multifamily units: Miami-Dade, Collier, Palm Beach, Hillsborough, Polk, Indian River, Hendry, Lee and Manatee. Seven counties have at least 1,500 DOH-permitted camp beds: Collier, Palm Beach, Hillsborough, Manatee, DeSoto, Hendry and Polk.

In most cases, the counties with the most farmworker housing supply also have the most farmworkers. Hillsborough, Miami-Dade, Palm Beach, Manatee, Collier, Hendry, Indian River, Lee, and Polk Counties appear on the lists of counties with highest number of farmworkers and on one or both lists of the counties with the most housing supply. There are, however, some disparities between the lists; for example, Orange County ranks seventh in the number of farmworkers and Volusia County ranks twelfth, but these counties have very few farmworker multifamily units or camp beds.

It is important to note that many farmworkers meet their housing needs through the private market or through subsidized housing not specifically reserved for farmworkers. Thus, the supply described in this section does not represent the full extent of affordable housing that might be available to farmworkers. When compared with the number of farmworker households and household members, as in the following section, this constrained definition of supply yields a higher need for farmworker housing than what a true accounting of the full supply of housing available to farmworkers would yield.

## 6. Need Estimate: Comparison of Supply and Households

The following estimates of the need for additional farmworker housing in Florida compare the supply of farmworker housing in each county to the number of farmworker households and household members. Table 12 estimates the need for beds for single farmworkers and housing units for families by comparing the number of DOH-permitted units to the number of unaccompanied farmworkers and the number of multifamily Section 514/516 and Florida Housing-assisted units to the number of accompanied farmworker households. Figures 4 and 5 are maps showing the need for beds for unaccompanied farmworkers and for multifamily units by county.

While we have compared the number of unaccompanied farmworkers to the number of DOH-permitted camp beds in Table 12, it is important to note that groups of unaccompanied farmworkers also may share units in state- and federally-subsidized multifamily developments. Therefore, some of the Florida Housing and Section 514/516 units that we have assigned to accompanied farmworker households may serve unaccompanied workers. Moreover, because unaccompanied workers may share housing, the numbers of *beds* needed for them do not necessarily translate to the number of individual *units* needed. Multifamily units may provide several beds; for example, a two-bedroom unit may provide four beds for unaccompanied farmworkers. Finally, note that any developments appearing in both the Florida Housing/RD multifamily list and the DOH camp list will be reflected in the multifamily category only.

The total gap between the number of single worker beds and the number of unaccompanied farmworkers is 24,935 beds. Nine counties have an unmet need for single worker housing exceeding 1,000 beds: Miami-Dade, Hillsborough, Orange, Indian River, Manatee, Hendry, Volusia, Lake, and Lee. The total gap between the number of multifamily units and the number of accompanied farmworker households is 25,435 units. The seven counties with unmet need for multifamily farmworker units exceeding 1,000 units are Hillsborough, Miami-Dade, Palm Beach, Manatee, Orange, Hendry, and Indian River.

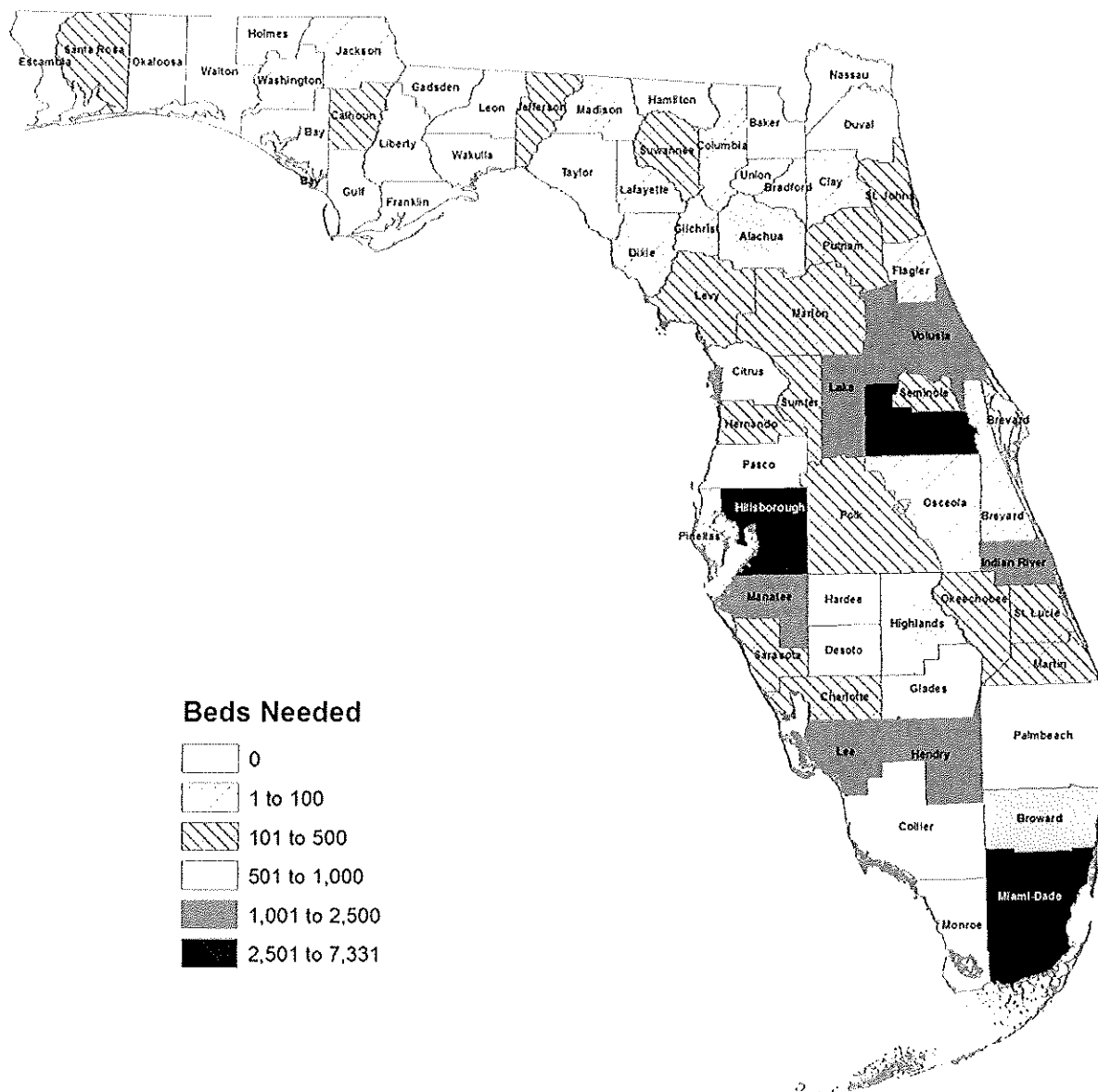
**Table 12. Need for Total Farmworker Housing Units by Type and County, 2011**

County	Unaccompanied Migrant & Seasonal Households	Supply: DOH Permitted Camps	Need for Single Person Beds	Accompanied Migrant & Seasonal Households	Supply: Section 514/516 and Florida Housing - Assisted Multifamily Units	Need for Multifamily Units
Alachua	607	8	599	346	0	346
Baker	0	0	0	0	0	0
Bay	0	0	0	0	0	0
Bradford	0	0	0	0	0	0
Brevard	91	0	91	52	0	52
Broward	680	0	680	388	174	214
Calhoun	112	0	112	64	0	64
Charlotte	399	0	399	227	0	227
Citrus	95	97	-2	54	0	54
Clay	21	0	21	12	0	12
Collier	3,497	6,854	-3,357	1,994	1,258	736
Columbia	80	0	80	46	0	46
DeSoto	1,279	2,485	-1,206	729	48	681
Dixie	23	0	23	13	0	13
Duval	0	0	0	0	0	0
Escambia	0	0	0	0	0	0
Flagler	98	60	38	56	0	56
Franklin	0	0	0	0	0	0
Gadsden	986	48	938	562	187	375
Gilchrist	37	0	37	21	0	21
Glades	41	685	-644	23	0	23
Gulf	0	0	0	0	0	0
Hamilton	77	130	-53	44	0	44
Hardee	590	973	-383	336	172	164
Hendry	3,739	2,268	1,471	2,132	360	1,772
Hernando	124	0	124	71	0	71
Highlands	1,458	710	748	831	160	671
Hillsborough	9,741	5,370	4,371	5,554	573	4,981
Holmes	0	0	0	0	0	0
Indian River	2,555	314	2,241	1,457	431	1,026
Jackson	61	0	61	35	0	35
Jefferson	115	0	115	65	0	65
Lafayette	42	0	42	24	0	24
Lake	1,319	100	1,219	752	136	616
Lee	1,741	544	1,197	993	246	747
Leon	75	344	-269	42	0	42
Levy	191	0	191	109	0	109
Liberty	0	0	0	0	0	0
Madison	38	0	38	22	0	22
Manatee	4,553	2,619	1,934	2,596	208	2,388

County	Unaccompanied Migrant & Seasonal Households	Supply: DOH Permitted Camps	Need for Single Person Beds	Accompanied Migrant & Seasonal Households	Supply: Section 514/516 and Florida Housing - Assisted Multifamily Units	Need for Multifamily Units
Marion	245	0	245	140	124	16
Martin	374	5	369	213	117	96
Miami-Dade	7,507	176	7,331	4,280	1,608	2,672
Monroe	0	0	0	0	14	-14
Nassau	0	0	0	0	0	0
Okaloosa	0	0	0	0	0	0
Okeechobee	312	181	131	178	115	63
Orange	3,150	30	3,120	1,796	0	1,796
Osceola	183	160	23	104	0	104
Palm Beach	5,992	6,307	-315	3,416	918	2,498
Pasco	334	561	-227	190	102	88
Pinellas	25	0	25	14	0	14
Polk	1,735	1,576	159	989	517	472
Putnam	362	60	302	206	52	154
Saint Johns	548	269	279	312	0	312
Saint Lucie	461	60	401	263	104	159
Santa Rosa	123	0	123	70	0	70
Sarasota	180	0	180	103	78	25
Seminole	158	0	158	90	0	90
Sumter	233	0	233	133	0	133
Suwannee	392	288	104	224	0	224
Taylor	0	0	0	0	0	0
Union	0	8	-8	0	0	0
Volusia	1,400	0	1,400	798	61	737
Wakulla	0	0	0	0	0	0
Walton	0	0	0	0	0	0
Washington	17	0	17	10	0	10
State of Florida Total	58,225	33,290	24,935	33,198	7,763	25,435

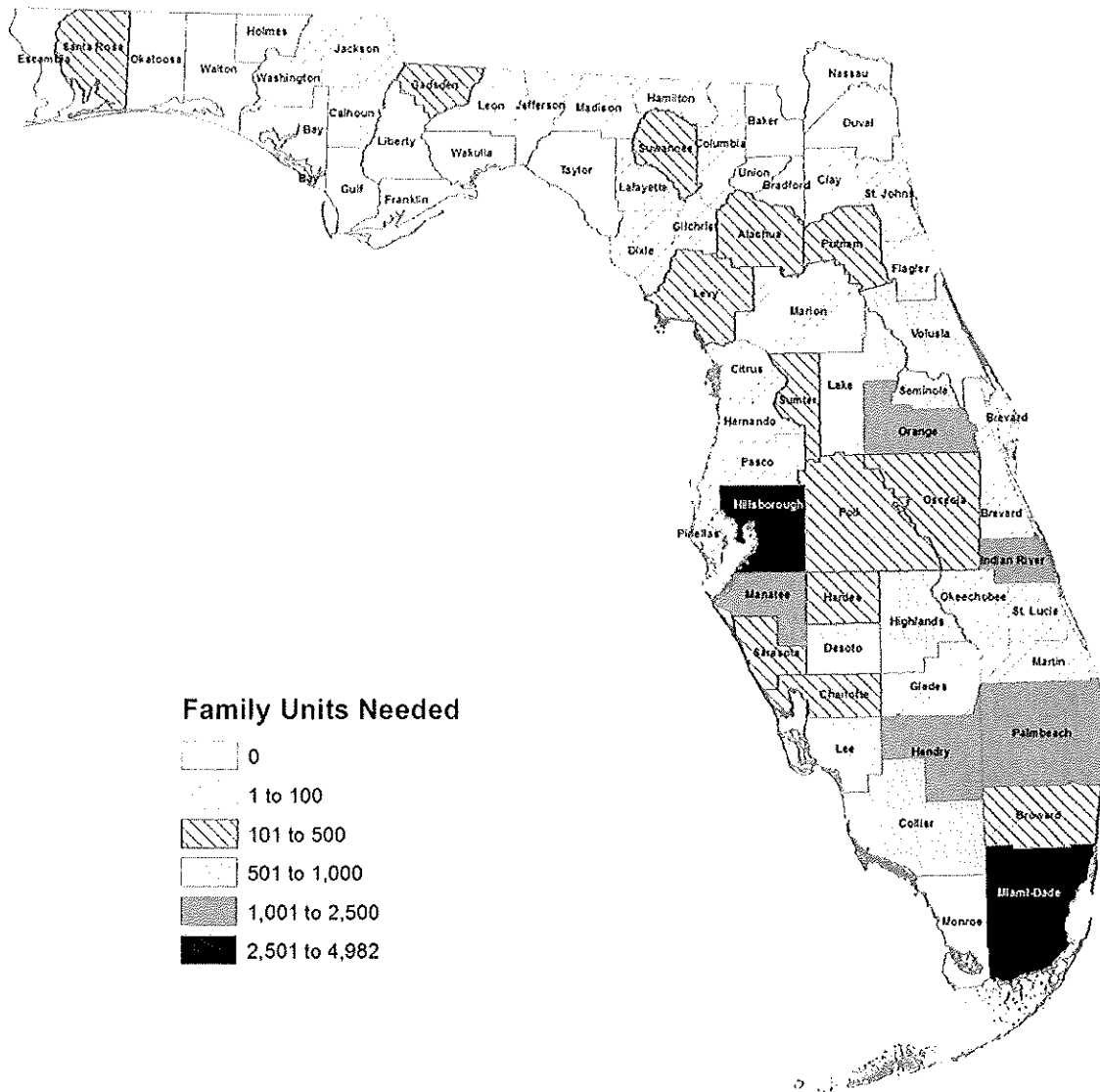
Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011; United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008; Florida Department of Health, 2013; Shimberg Center for Affordable Housing, *Affordable Housing Inventory*, 2013.

**Figure 4. Need for Single Farmworker Beds by County, 2011**



Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011; United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008; Florida Department of Health, 2013; Shimberg Center for Affordable Housing, *Affordable Housing Inventory*, 2013.

Figure 5. Need for Farmworker Multifamily Units by County, 2011



Sources: United States Bureau of Labor Statistics, *Quarterly Census of Employment and Wages*, 2011; United States Department of Labor, *National Agricultural Workers Survey*, 2005-2008; Florida Department of Health, 2013; Shimberg Center for Affordable Housing, *Affordable Housing Inventory*, 2013.

## 7. Data Limitations

The numbers of farmworkers and housing units and the income numbers on which the analysis in this report is based should be used with caution due to several data limitations. First, as noted in the Methodology section, the method of using QCEW data on wages to estimate the number of farmworkers results in only 84 percent of farmworkers being assigned to specific counties and a very small “County Unknown” category. The remaining 16 percent are distributed among counties based on those counties’ share of the 84 percent of workers already allocated. This will result in overestimates of workers in some counties, particularly those with the largest number of farmworkers, and underestimates of workers in some of the counties with fewer workers.

Second, the sample of workers questioned for the NAWS survey is small and may under-represent people working on Florida citrus farms. Thus, the division between migrant and seasonal workers, the division between accompanied and unaccompanied workers, and the income numbers are subject to error. As noted earlier, the NAWS data come from 2005-2008 surveys, which we recommend be updated to 2009-2012 data when the Department of Labor releases the NAWS data from 2010, 2011 and 2012 later this year.

Third, as noted in Section 4, the lack of family income data by household led us to extrapolate the number of households in each income range from the number of workers in that range. This may have led to an overestimate of accompanied worker households at the higher income levels and an underestimate of accompanied worker households at the lower income levels.

Finally, as noted in Section 5, the count of housing units for farmworkers and their families does not include farmworker housing that might be provided by the private market or local entities, other than those licensed as camps by the state. In some cases, the camps themselves may be able to house more workers, since the capacity recorded by DOH reflects point-in-time occupancy levels. Therefore, while the supply numbers do accurately reflect the stock of state- and federally-subsidized multifamily units reserved for farmworkers and likely account for the vast majority of beds in DOH camps, they do not reflect all of the housing choices available to farmworkers.