

2019 Rental Market Study Housing Needs of Farmworkers and Commercial Fishing Workers

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Farmworker Housing Needs in Florida

This segment of the Rental Market Study discusses the need for rental housing for Florida's farmworkers. It compares the number of farmworkers and their households to the capacity of the state's migrant labor housing and affordable farmworker housing developments.

Some definitions are key to understanding the analysis:

- *Migrant* farmworkers travel more than 75 miles to find farm work.¹
- *Seasonal* farmworkers perform labor in agriculture but do not migrate.
- *Accompanied* farmworkers are those living with a spouse, children, or parents, or minor farmworkers living with a sibling.
- *Unaccompanied* farmworkers do not live with immediate family.
- *Migrant camps* receive permits from the Florida Department of Health (DOH) to house farmworkers.
- *Farmworker multifamily developments* provide affordable rental units to low-income farmworker households. They receive subsidies from Florida Housing Finance Corporation (Florida Housing) or U.S. Department of Agriculture's Rural Development (USDA RD) division.

See the *Methodology for Farmworker Estimates* section for techniques used to estimate the numbers of migrant and seasonal workers, accompanied and unaccompanied workers, households, and farmworker housing supply.

The farmworker count includes people working in the United States temporarily under the federal H-2A visa program. The H-2A program allows U.S. growers or contractors to bring foreign workers to the U.S. to fill temporary or seasonal agriculture jobs if they can "demonstrate that there are not sufficient U.S. workers who are able, willing, qualified, and available to do the temporary work."² The number of H-2A workers certified in Florida grew from 17,942 in 2015 to 30,462 in 2018.

Employers are required to provide housing for H-2A workers, but in some cases, employers may choose to lease existing affordable or other housing for this purpose. In Florida, H-2A worker housing is part of the DOH-licensed migrant camp inventory. In this report, H-2A workers are listed separately from other migrant worker counts. All H-2A workers are assumed to be unaccompanied.

¹ Definitions of migrant vs. seasonal and accompanied vs. unaccompanied farmworkers come from the Department of Labor's National Agricultural Workers Survey (NAWS).

² U.S. Citizenship and Immigration Services, *H-2A Temporary Agricultural Workers*. Retrieved from <http://www.uscis.gov/working-united-states/temporary-workers/h-2a-agricultural-workers/h-2a-temporary-agricultural-workers>.

Farmworker Population and Household Estimates

Statewide

Florida had an estimated 113,354 farmworkers in 2017, the most recent year for which full data are available.³ These workers are estimated to form 100,810 households: 65,442 single-person “households” made up of unaccompanied individuals and 35,367 family households including at least one accompanied worker.

Table 7.1. Migrant and Seasonal Workers, Households and Household Members

	Workers			Households			Household Members		
	Unaccomp. Workers	Accompanied Workers	Total Workers	Unaccomp. Worker Households	Accompanied Worker Households	Total Households	Unaccomp. Worker Household Members	Accompanied Worker Household Members	Total Household Members
Migrant	12,931	6,963	19,894	12,931	3,868	16,799	12,931	14,700	27,631
Seasonal	22,049	40,949	62,998	22,049	31,499	53,548	22,049	122,846	144,895
H-2A	30,462	-	30,462	30,462	-	30,462	30,462	-	30,462
Total	65,442	47,912	113,354	65,442	35,367	100,810	65,442	137,545	202,988

Source: U.S. Bureau of Labor Statistics, 2017 Quarterly Census of Employment and Wages; U.S. Department of Labor, National Agricultural Workers Survey (multiple years); U.S. Department of Labor, Office of Foreign Labor Certification, 2018 H-2A Disclosure Data.

See the *Methodology for Farmworker Estimates* section for a full description of the techniques used to estimate the numbers of farmworkers, households by type and household members.

Counties

Florida’s agricultural workforce is heavily concentrated in two areas. The major fruit and vegetable growing region is in central and southwestern counties, ranging from inland Hillsborough and Manatee Counties on the northwest to Polk, Highlands, Hendry, and inland Collier Counties to the east. Sugar cane and nursery operations are concentrated in the southeastern portion of the state, particularly Palm Beach and Miami-Dade Counties. Three-quarters of the state’s farmworkers are concentrated in these two areas.

³ The exception is the count of H-2A workers. It is a count of individuals certified for work in federal Fiscal Year 2018, which runs from October 1, 2017 to September 30, 2018.

Table 7.2 and Figure 7.1 show the breakdown of all farmworkers and households by county of employment. Tables 7.3 and 7.4 show counts of migrant and seasonal unaccompanied workers and accompanied workers and households, respectively, by county. Unaccompanied worker counts include H-2A workers.

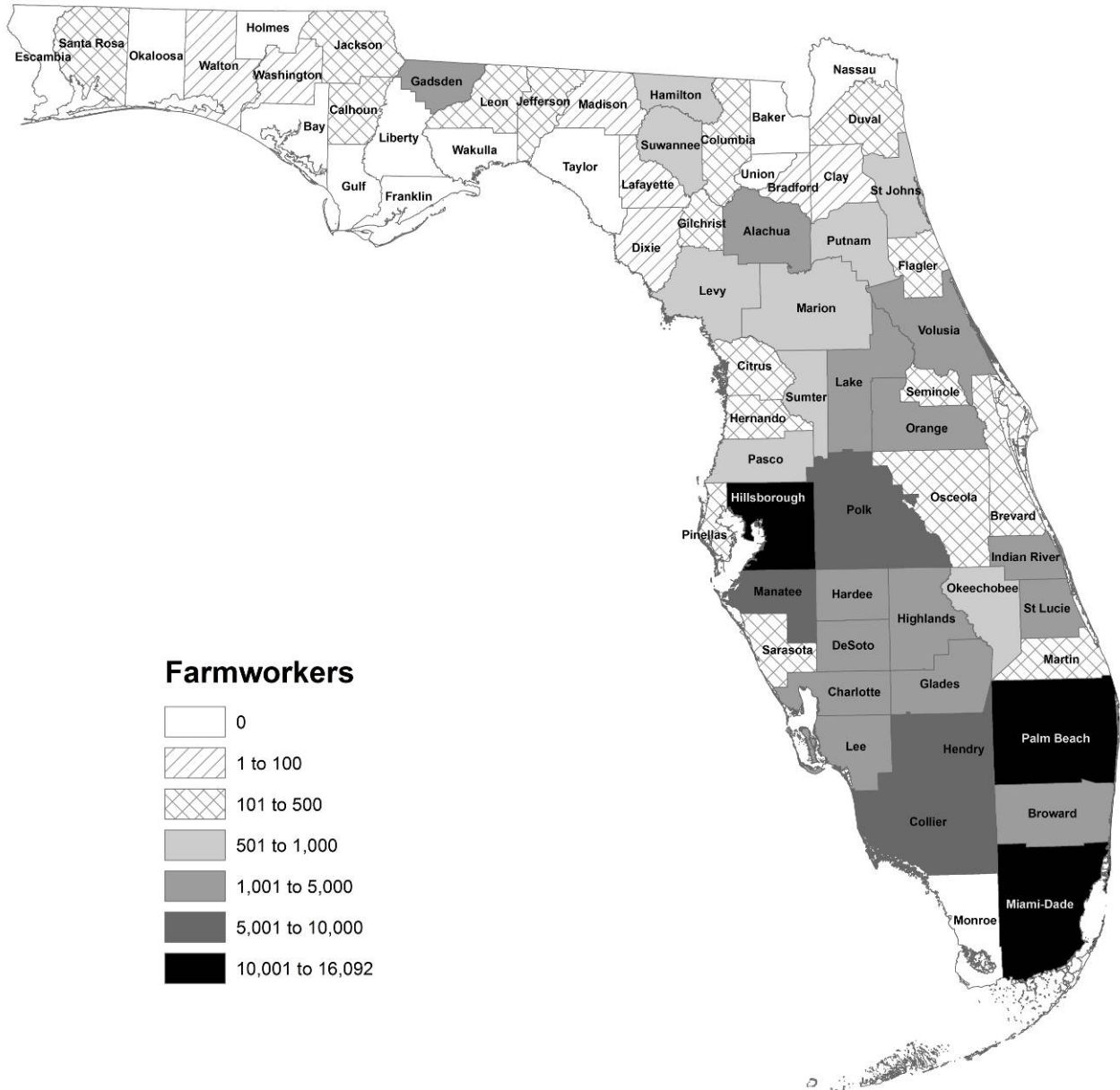
Table 7.2. Farmworkers, Households and Household Members by County of Employment

County	Percentage of State's Farmworkers	Farmworkers	Farmworker Households	Farmworker Household Members
Alachua	1.47%	1,667	1,516	2,750
Baker	0.00%	0	0	0
Bay	0.00%	0	0	0
Bradford	0.02%	21	19	33
Brevard	0.14%	163	140	325
Broward	0.93%	1,057	897	2,200
Calhoun	0.14%	154	133	309
Charlotte	1.06%	1,197	1,132	1,663
Citrus	0.22%	247	224	405
Clay	0.02%	25	21	52
Collier	5.63%	6,386	5,615	11,891
Columbia	0.09%	102	87	213
DeSoto	3.24%	3,668	3,471	5,072
Dixie	0.05%	52	52	52
Duval	0.15%	168	142	349
Escambia	0.00%	0	0	0
Flagler	0.30%	336	313	502
Franklin	0.00%	0	0	0
Gadsden	1.38%	1,565	1,328	3,257
Gilchrist	0.29%	332	309	496
Glades	1.49%	1,690	1,662	1,886
Gulf	0.00%	0	0	0
Hamilton	0.79%	897	850	1,229
Hardee	2.49%	2,823	2,683	3,820
Hendry	6.00%	6,799	6,098	11,804
Hernando	0.23%	264	239	438
Highlands	4.20%	4,758	4,240	8,459
Hillsborough	14.20%	16,092	14,579	26,903
Holmes	0.00%	0	0	0
Indian River	2.30%	2,608	2,313	4,713
Jackson	0.31%	354	336	485
Jefferson	0.17%	197	167	410
Lafayette	0.03%	38	32	78

County	Percentage of State's Farmworkers	Farmworkers	Farmworker Households	Farmworker Household Members
Lake	2.30%	2,608	2,290	4,875
Lee	2.55%	2,887	2,596	4,961
Leon	0.23%	266	227	542
Levy	0.47%	530	493	794
Liberty	0.00%	0	0	0
Madison	0.02%	20	17	42
Manatee	6.88%	7,795	6,949	13,845
Marion	0.50%	568	493	1,099
Martin	0.44%	494	421	1,011
Miami-Dade	10.12%	11,467	9,741	23,802
Monroe	0.00%	0	0	0
Nassau	0.00%	0	0	0
Okaloosa	0.00%	0	0	0
Okeechobee	0.66%	747	681	1,216
Orange	3.32%	3,758	3,209	7,680
Osceola	0.19%	210	187	375
Palm Beach	10.34%	11,720	10,317	21,743
Pasco	0.45%	513	436	1,064
Pinellas	0.11%	124	105	258
Polk	5.55%	6,286	5,657	10,779
Putnam	0.45%	509	449	938
St. Johns	0.74%	842	740	1,572
St. Lucie	1.32%	1,498	1,299	2,919
Santa Rosa	0.25%	284	241	592
Sarasota	0.34%	382	324	795
Seminole	0.25%	286	243	595
Sumter	0.50%	566	489	1,113
Suwannee	0.83%	939	867	1,455
Taylor	0.00%	0	0	0
Union	0.00%	0	0	0
Volusia	1.73%	1,963	1,670	4,058
Wakulla	0.00%	0	0	0
Walton	0.005%	6	5	12
Washington	0.04%	44	37	91
County Unknown	2.11%	2,387	2,025	4,967
State of Florida	100.00%	113,354	100,810	202,988

Source: U.S. Bureau of Labor Statistics, 2017 Quarterly Census of Employment and Wages; U.S. Department of Labor, National Agricultural Workers Survey (multiple years); U.S. Department of Labor, Office of Foreign Labor Certification, 2018 H-2A Disclosure Data.

Figure 7.1. Farmworkers by County of Employment



Source: U.S. Bureau of Labor Statistics, 2017 Quarterly Census of Employment and Wages; U.S. Department of Labor, National Agricultural Workers Survey (multiple years); U.S. Department of Labor, Office of Foreign Labor Certification, 2018 H-2A Disclosure Data.

Table 7.3. Unaccompanied Farmworkers by County of Employment

County	Unaccompanied Migrant Workers	Unaccompanied Seasonal Workers	H-2A Workers	Total Unaccompanied Workers
Alachua	156	266	666	1,088
Baker	0	0	0	0
Bay	0	0	0	0
Bradford	2	3	9	14
Brevard	23	40	13	76
Broward	165	281	0	446
Calhoun	22	38	12	72
Charlotte	67	115	766	948
Citrus	23	39	100	162
Clay	4	7	0	10
Collier	794	1,354	1,294	3,443
Columbia	16	27	0	43
DeSoto	203	345	2,369	2,917
Dixie	0	0	52	52
Duval	26	45	0	71
Escambia	0	0	0	0
Flagler	24	41	182	247
Franklin	0	0	0	0
Gadsden	244	416	0	660
Gilchrist	24	40	180	244
Glades	28	48	1,508	1,585
Gulf	0	0	0	0
Hamilton	48	82	590	720
Hardee	144	245	1,900	2,289
Hendry	722	1,231	2,170	4,123
Hernando	25	43	102	170
Highlands	534	910	1,336	2,780
Hillsborough	1,560	2,659	6,094	10,313
Holmes	0	0	0	0
Indian River	304	518	661	1,483
Jackson	19	32	233	284
Jefferson	31	52	0	83
Lafayette	6	10	0	16
Lake	327	558	511	1,396
Lee	299	510	968	1,778
Leon	40	68	10	118
Levy	38	65	286	389

County	Unaccompanied Migrant Workers	Unaccompanied Seasonal Workers	H-2A Workers	Total Unaccompanied Workers
Liberty	0	0	0	0
Madison	3	5	0	8
Manatee	873	1,488	2,201	4,562
Marion	77	131	76	283
Martin	75	127	15	217
Miami-Dade	1,780	3,034	60	4,874
Monroe	0	0	0	0
Nassau	0	0	0	0
Okaloosa	0	0	0	0
Okeechobee	68	115	313	496
Orange	566	965	131	1,662
Osceola	24	40	58	122
Palm Beach	1,446	2,466	2,451	6,363
Pasco	80	136	3	218
Pinellas	19	33	0	52
Polk	648	1,105	2,131	3,885
Putnam	62	106	112	280
St. Johns	105	180	167	452
St. Lucie	205	350	184	739
Santa Rosa	44	76	0	120
Sarasota	60	102	0	161
Seminole	45	76	0	121
Sumter	79	135	60	273
Suwannee	74	127	462	663
Taylor	0	0	0	0
Union	0	0	0	0
Volusia	302	515	26	843
Wakulla	0	0	0	0
Walton	1	1	0	2
Washington	7	12	0	18
County Unknown	372	635	0	1,007
State of Florida	12,931	22,049	30,462	65,442

Source: U.S. Bureau of Labor Statistics, 2017 Quarterly Census of Employment and Wages; U.S. Department of Labor, National Agricultural Workers Survey (multiple years); U.S. Department of Labor, Office of Foreign Labor Certification, 2018 H-2A Disclosure Data.

Table 7.4. Accompanied Farmworkers, Households, and Household Members by County of Employment

County	Accomp. Migrant Workers	Accomp. Seasonal Workers	Total Accomp. Workers	Accomp. Migrant Households	Accomp. Seasonal Households	Total Accomp. Households	Accomp. Migrant Household Members	Accomp. Seasonal Household Members	Total Accomp. Household Members
Alachua	84	495	579	47	380	427	178	1,484	1,661
Baker	0	0	0	0	0	0	0	0	0
Bay	0	0	0	0	0	0	0	0	0
Bradford	1	6	7	1	4	5	2	17	19
Brevard	13	74	87	7	57	64	27	222	249
Broward	89	522	611	49	402	451	187	1,566	1,754
Calhoun	12	70	82	7	54	61	25	211	236
Charlotte	36	213	249	20	164	184	76	639	715
Citrus	12	72	85	7	56	63	26	217	243
Clay	2	12	14	1	9	11	4	37	41
Collier	428	2,515	2,943	238	1,935	2,172	903	7,546	8,449
Columbia	9	51	59	5	39	44	18	152	170
DeSoto	109	642	751	61	493	554	230	1,925	2,155
Dixie	0	0	0	0	0	0	0	0	0
Duval	14	83	97	8	64	72	30	248	278
Escambia	0	0	0	0	0	0	0	0	0
Flagler	13	76	89	7	59	66	27	228	255
Franklin	0	0	0	0	0	0	0	0	0
Gadsden	131	773	904	73	595	668	277	2,319	2,596
Gilchrist	13	75	88	7	58	65	27	225	252
Glades	15	90	105	8	69	78	32	269	302
Gulf	0	0	0	0	0	0	0	0	0
Hamilton	26	152	177	14	117	131	54	455	509
Hardee	78	456	533	43	351	394	164	1,367	1,531
Hendry	389	2,287	2,675	216	1,759	1,975	821	6,860	7,681
Hernando	14	80	93	8	61	69	29	240	268

County	Accomp. Migrant Workers	Accomp. Seasonal Workers	Total Accomp. Workers	Accomp. Migrant Households	Accomp. Seasonal Households	Total Accomp. Households	Accomp. Migrant Household Members	Accomp. Seasonal Household Members	Total Accomp. Household Members
Highlands	287	1,691	1,978	160	1,300	1,460	607	5,072	5,679
Hillsborough	840	4,939	5,779	467	3,799	4,266	1,773	14,817	16,590
Holmes	0	0	0	0	0	0	0	0	0
Indian River	164	962	1,125	91	740	831	345	2,885	3,230
Jackson	10	60	70	6	46	52	21	179	201
Jefferson	17	97	114	9	75	84	35	292	326
Lafayette	3	19	22	2	14	16	7	56	63
Lake	176	1,036	1,212	98	797	895	372	3,107	3,479
Lee	161	948	1,109	90	729	819	340	2,843	3,184
Leon	21	126	148	12	97	109	45	379	424
Levy	20	120	141	11	93	104	43	361	405
Liberty	0	0	0	0	0	0	0	0	0
Madison	2	10	12	1	8	9	4	30	33
Manatee	470	2,764	3,234	261	2,126	2,387	992	8,291	9,283
Marion	41	243	284	23	187	210	87	729	816
Martin	40	236	277	22	182	204	85	709	794
Miami-Dade	958	5,635	6,593	532	4,335	4,867	2,023	16,905	18,928
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	36	214	251	20	165	185	77	643	720
Orange	305	1,792	2,096	169	1,378	1,548	643	5,375	6,018
Osceola	13	75	88	7	58	65	27	225	252
Palm Beach	779	4,579	5,358	433	3,522	3,955	1,644	13,737	15,380
Pasco	43	252	295	24	194	218	90	756	846
Pinellas	10	61	72	6	47	53	22	184	206
Polk	349	2,053	2,402	194	1,579	1,773	737	6,158	6,895

County	Accomp. Migrant Workers	Accomp. Seasonal Workers	Total Accomp. Workers	Accomp. Migrant Households	Accomp. Seasonal Households	Total Accomp. Households	Accomp. Migrant Household Members	Accomp. Seasonal Household Members	Total Accomp. Household Members
Putnam	33	196	229	19	151	169	70	588	659
St. Johns	57	334	390	32	257	288	120	1,001	1,120
St. Lucie	110	649	760	61	499	561	233	1,947	2,180
Santa Rosa	24	140	164	13	108	121	50	421	472
Sarasota	32	189	221	18	145	163	68	566	634
Seminole	24	141	165	13	109	122	51	424	475
Sumter	42	250	292	24	192	216	90	750	839
Suwannee	40	236	276	22	181	204	85	707	792
Taylor	0	0	0	0	0	0	0	0	0
Union	0	0	0	0	0	0	0	0	0
Volusia	163	957	1,120	90	736	827	344	2,871	3,214
Wakulla	0	0	0	0	0	0	0	0	0
Walton	0	3	3	0	2	2	1	8	9
Washington	4	22	25	2	17	19	8	65	73
County Unknown	200	1,179	1,379	111	907	1,018	423	3,537	3,960
State of Florida	6,963	40,949	47,912	3,868	31,499	35,367	14,700	122,846	137,545

Source: U.S. Bureau of Labor Statistics, 2017 Quarterly Census of Employment and Wages; U.S. Department of Labor, National Agricultural Workers Survey (multiple years); U.S. Department of Labor, Office of Foreign Labor Certification, 2018 H-2A Disclosure Data.

Farmworker Housing Supply

While farmworkers make a variety of housing arrangements, two types of housing are reserved specifically for them:

- *Farmworker multifamily developments:* Florida Housing devotes SAIL, HOME and Low Income Housing Tax Credit resources to construction and rehabilitation of privately owned farmworker rental housing. USDA RD subsidizes production of farmworker rental housing through its Section 514/516 program. In most cases, USDA RD also provides ongoing rent assistance to the tenants in these developments. Statewide, 69 multifamily developments set aside 4,327 affordable housing units set aside for farmworkers.⁴
- *Migrant camps:* The Florida Department of Health (DOH) issues permits for camps to house unaccompanied migrant and seasonal farmworkers. These include grower-provided housing for H-2A workers. Most provide housing for unaccompanied workers, often on a daily or weekly basis. The camps may consist of single-family homes, mobile homes, motels, multifamily units, or dormitory-style arrangements. Statewide, DOH has identified 34,451 “beds” for individual workers.

Table 7.5 shows the supply of the two types of housing by county. In some cases, a development subsidized by Florida Housing or USDA RD also serves as a licensed camp; those units are counted in the Florida Housing/USDA RD column only. This includes Miami-Dade County’s sole licensed migrant camp, Casa Cesar Chavez at Everglades Village. The table shows that both types of farmworker housing follow the same geographic patterns as the farmworker population counts, with a heavy presence in the southern counties.

Table 7.5. Multifamily Farmworker Units and Migrant Camp Beds by County

County	Florida Housing & USDA RD Multifamily Units	DOH Permitted Camp Beds
Alachua	0	846
Baker	0	0
Bay	0	0
Bradford	0	0
Brevard	0	10
Broward	0	0
Calhoun	0	0
Charlotte	0	0
Citrus	20	101
Clay	0	0

⁴ Many developments set aside a portion of units for farmworkers rather than the entire complex. The 4,327 unit figure includes only the farmworker set-aside units rather than all affordable units in farmworker developments. Owners of several farmworker developments have received temporary or permanent waivers from Florida Housing and USDA RD to reduce the farmworker set-aside requirements. The units with waived requirements are not included in the 4,327 unit total.

County	Florida Housing & USDA RD Multifamily Units	DOH Permitted Camp Beds
Collier	626	2,860
Columbia	0	190
DeSoto	117	3,088
Dixie	0	160
Duval	0	0
Escambia	0	0
Flagler	0	220
Franklin	0	0
Gadsden	50	0
Gilchrist	0	0
Glades	0	847
Gulf	0	0
Hamilton	0	857
Hardee	69	1,875
Hendry	96	2,710
Hernando	0	99
Highlands	61	3,155
Hillsborough	453	6,179
Holmes	0	0
Indian River	134	378
Jackson	0	97
Jefferson	0	0
Lafayette	0	10
Lake	0	678
Lee	78	673
Leon	0	466
Levy	0	80
Liberty	0	0
Madison	0	0
Manatee	50	2,543
Marion	166	44
Martin	117	0
Miami-Dade	853	69
Monroe	0	0
Nassau	0	0
Okaloosa	0	4
Okeechobee	15	1,032
Orange	0	285
Osceola	104	160
Palm Beach	745	3,524

County	Florida Housing & USDA RD Multifamily Units	DOH Permitted Camp Beds
Pasco	0	0
Pinellas	0	0
Polk	284	2,078
Putnam	42	293
St. Johns	0	320
St. Lucie	184	181
Santa Rosa	0	0
Sarasota	0	0
Seminole	0	0
Sumter	0	0
Suwannee	0	0
Taylor	0	0
Union	32	0
Volusia	31	95
Wakulla	0	0
Walton	0	0
Washington	0	0
State of Florida Total	4,327	36,207

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

Need Estimate: Comparison of Supply and Households

The need for additional farmworker housing is estimated by comparing the supply of DOH-permitted migrant camp beds to the number of unaccompanied workers, and the supply of multifamily units assisted by Florida Housing and USDA RD to the number of accompanied worker households. Statewide, there are 65,442 unaccompanied workers and 36,207 permitted migrant camp beds, yielding a need for 29,235 additional beds for single workers. There are 35,367 accompanied households and 4,327 multifamily farmworker set aside units, yielding a need for 31,040 additional multifamily units.

Table 7.6 and Figures 7.2 and 7.3 show the need for unaccompanied worker beds and multifamily units by county. The highest need for migrant beds appears in counties that combine larger urbanized areas and agricultural land, including Miami-Dade, Hillsborough, Palm Beach, Manatee, and Polk Counties. Similarly, five combined urban/agricultural counties show the greatest need for multifamily farmworker units: Miami-Dade, Hillsborough, Palm Beach, and Manatee. Rural Hendry County also has a large need for both single worker beds and multifamily units.

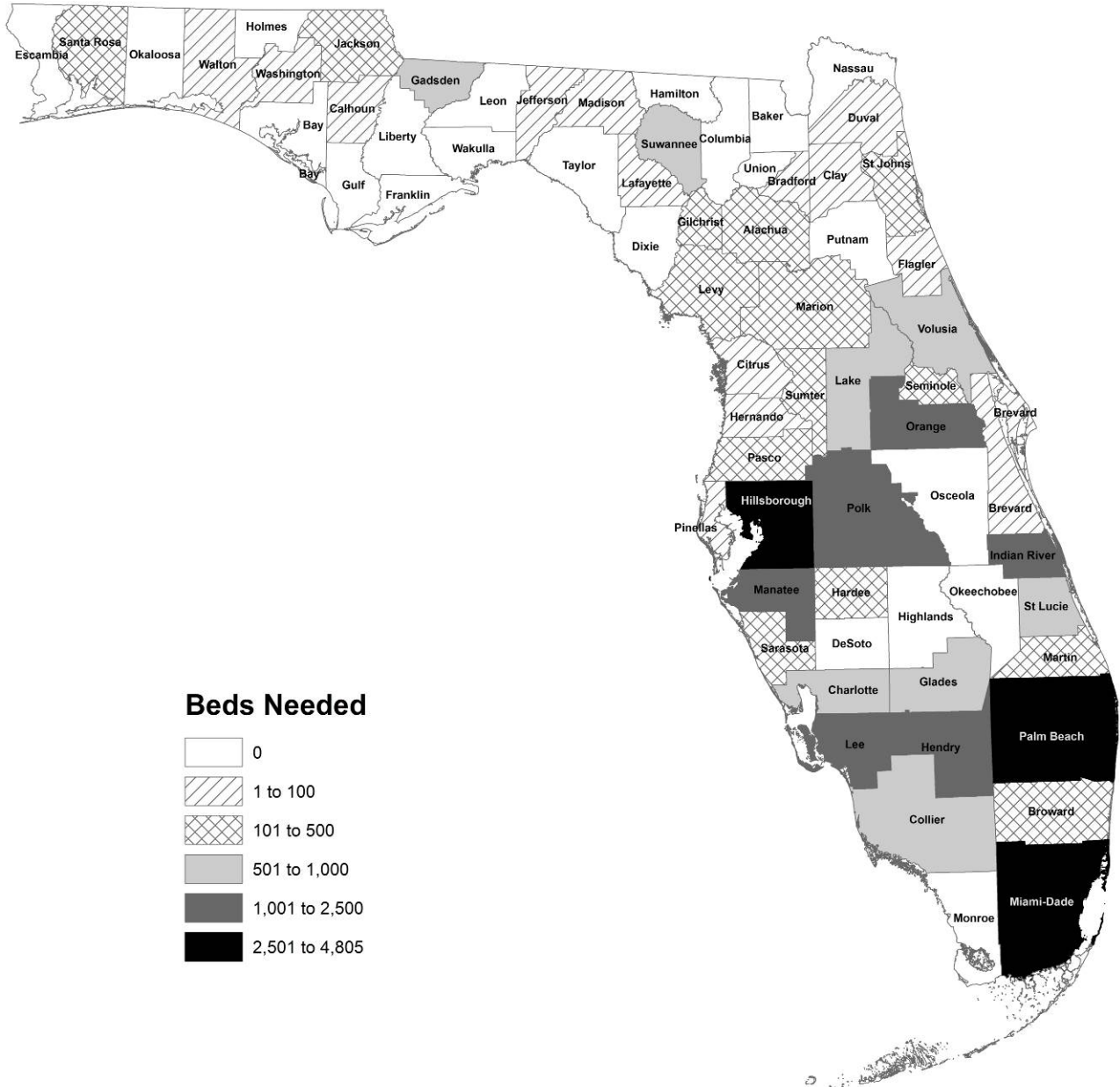
Table 7.6. Need for Farmworker Housing by Type and County

County	Total Unaccomp. Workers	DOH Permitted Camp Beds	Need for Single Worker Beds	Accompanied Migrant & Seasonal Households	USDA RD & Florida Housing Multifamily Units	Need for Multifamily Units
Alachua	1,088	846	242	427	0	427
Baker	0	0	0	0	0	0
Bay	0	0	0	0	0	0
Bradford	14	0	14	5	0	5
Brevard	76	10	66	64	0	64
Broward	446	0	446	451	0	451
Calhoun	72	0	72	61	0	61
Charlotte	948	0	948	184	0	184
Citrus	162	101	61	63	20	43
Clay	10	0	10	11	0	11
Collier	3,443	2,860	583	2,172	626	1,546
Columbia	43	190	-147	44	0	44
DeSoto	2,917	3,088	-171	554	117	437
Dixie	52	160	-108	0	0	0
Duval	71	0	71	72	0	72
Escambia	0	0	0	0	0	0
Flagler	247	220	27	66	0	66
Franklin	0	0	0	0	0	0
Gadsden	660	0	660	668	50	618
Gilchrist	244	0	244	65	0	65
Glades	1,585	847	738	78	0	78
Gulf	0	0	0	0	0	0
Hamilton	720	857	-137	131	0	131
Hardee	2,289	1,875	414	394	69	325
Hendry	4,123	2,710	1,413	1,975	96	1,879
Hernando	170	99	71	69	0	69
Highlands	2,780	3,155	-375	1,460	61	1,399
Hillsborough	10,313	6,179	4,134	4,266	453	3,813
Holmes	0	0	0	0	0	0
Indian River	1,483	378	1,105	831	134	697
Jackson	284	97	187	52	0	52
Jefferson	83	0	83	84	0	84
Lafayette	16	10	6	16	0	16
Lake	1,396	678	718	895	0	895
Lee	1,778	673	1,105	819	78	741
Leon	118	466	-348	109	0	109

County	Total Unaccomp. Workers	DOH Permitted Camp Beds	Need for Single Worker Beds	Accompanied Migrant & Seasonal Households	USDA RD & Florida Housing Multifamily Units	Need for Multifamily Units
Levy	389	80	309	104	0	104
Liberty	0	0	0	0	0	0
Madison	8	0	8	9	0	9
Manatee	4,562	2,543	2,019	2,387	50	2,337
Marion	283	44	239	210	166	44
Martin	217	0	217	204	117	87
Miami-Dade	4,874	69	4,805	4,867	853	4,014
Monroe	0	0	0	0	0	0
Nassau	0	0	0	0	0	0
Okaloosa	0	4	-4	0	0	0
Okeechobee	496	1,032	-536	185	15	170
Orange	1,662	285	1,377	1,548	0	1,548
Osceola	122	160	-38	65	104	-39
Palm Beach	6,363	3,524	2,839	3,955	745	3,210
Pasco	218	0	218	218	0	218
Pinellas	52	0	52	53	0	53
Polk	3,885	2,078	1,807	1,773	284	1,489
Putnam	280	293	-13	169	42	127
St. Johns	452	320	132	288	0	288
St. Lucie	739	181	558	561	184	377
Santa Rosa	120	0	120	121	0	121
Sarasota	161	0	161	163	0	163
Seminole	121	0	121	122	0	122
Sumter	273	0	273	216	0	216
Suwannee	663	0	663	204	0	204
Taylor	0	0	0	0	0	0
Union	0	0	0	0	32	-32
Volusia	843	95	748	827	31	796
Wakulla	0	0	0	0	0	0
Walton	2	0	2	2	0	2
Washington	18	0	18	19	0	19
State of Florida Total	65,442	36,207	29,235	35,367	4,327	31,040

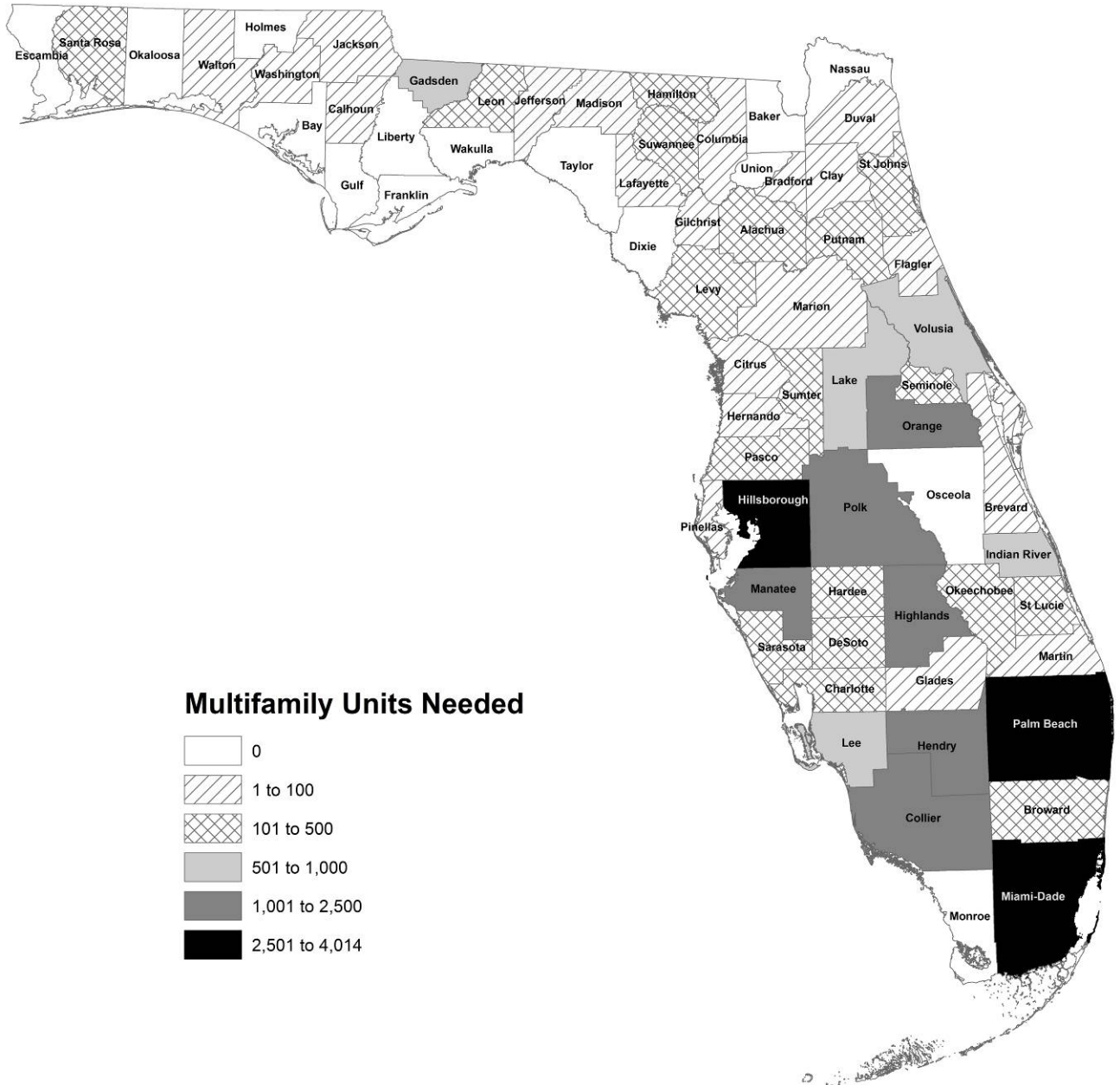
Source: U.S. Bureau of Labor Statistics, 2017 Quarterly Census of Employment and Wages; U.S. Department of Labor, National Agricultural Workers Survey (multiple years); U.S. Department of Labor, Office of Foreign Labor Certification, 2018 H-2A Disclosure Data; Florida Department of Health; Shimberg Center for Housing Studies, Assisted Housing Inventory.

Figure 7.2. Need for Beds for Unaccompanied Workers by County



Source: U.S. Bureau of Labor Statistics, 2017 Quarterly Census of Employment and Wages; U.S. Department of Labor, National Agricultural Workers Survey (multiple years); U.S. Department of Labor, Office of Foreign Labor Certification, 2018 H-2A Disclosure Data; Florida Department of Health; Shimberg Center for Housing Studies, Assisted Housing Inventory.

Figure 7.3. Need for Farmworker Multifamily Units by County



Source: U.S. Bureau of Labor Statistics, 2017 Quarterly Census of Employment and Wages; U.S. Department of Labor, National Agricultural Workers Survey (multiple years); U.S. Department of Labor, Office of Foreign Labor Certification, 2018 H-2A Disclosure Data; Florida Department of Health; Shimberg Center for Housing Studies, Assisted Housing Inventory.

Methodology for Farmworker Estimates

Total Farmworker Counts

The state and county numbers of farmworkers are derived from two counts. For H-2A workers, the U.S. Department of Labor provides a direct count of workers. Specifically, this report uses the count of workers certified for sites in Florida during federal Fiscal Year 2018 (October 1, 2017 – September 30, 2018), downloaded from

<https://www.foreignlaborcert.doleta.gov/performance/data.cfm>.

For other workers, there is no direct count. Instead, the number of workers is estimated using data from the U.S. 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.⁵

- QCEW data are available by state and county as well as by NAICS (North American Industry Classification, formerly SIC) industrial code. 2017 is the most recent year for which full data are publicly available. H-2A workers are not included in QCEW data because they are not eligible for unemployment insurance. The farmworker counts are based on 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- sample survey of U.S. crop workers that collects demographic, employment, and health data" 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.⁶ The Department of Labor provided special tabulations of the NAWS data for this report through contractor JBS International.

State and county-level estimates of non-H-2A workers are calculated using 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 = Total annual wages/Average weekly wage
2. Use the NAWS data to calculate the number of workers required to work that number of weeks in one year.

⁵ United States Bureau of Labor Statistics. *QCEW Overview*. <http://www.bls.gov/cew/cewover.htm>

⁶ United States Department of Labor Employment and Training Administration. *The National Agricultural Workers Survey*. <https://doleta.gov/naaws>.

The NAWS shows that farmworkers in Florida worked an average of 38 weeks during the 2015-2016 period, the most recent 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:

$$\text{Workers} = \text{Total annual weeks worked} / \text{Average weeks worked per year} = \text{Total annual weeks worked} / 38$$

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

$$\text{Total farmworkers} = \text{Workers in code 111} + \text{Workers in code 11511}$$

Using the QCEW to distribute farmworkers across 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. There are 2,387 workers estimated in a “County Unknown” category, mostly from the Support Activities sector. These workers and their household members are counted in Tables 7.2-7.4 but are not included in the Table 7.6 comparing supply and demand by county.

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 3,043 farmworkers (4 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 workers among the counties and the “County Unknown” category based on the counties’ share of the workers for whom a county (or “County Unknown”) designation could be identified using the QCEW and NAWS data. 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.

Detailed Household and Member Counts

The NAWS dataset was used to stratify non-H-2A farmworkers by migrant/seasonal and accompanied/unaccompanied status, in order to estimate the number of farmworker households. To increase sample size, NAWS interviews were included from the most recent two-year period available (fiscal years 2015-2016; 375 respondents).

Steps to translate farmworker counts into households and household members were as follows:

1. Divide non-H-2A workers into migrant and seasonal categories.⁷ In the NAWS interviews, 24 percent of workers were migrant and 76 percent were seasonal. These percentages were applied to the county and state total non-H-2A workers. For the statewide total of 82,892 non-H-2A workers, this meant that 19,894 were assumed to be migrant ($82,892 * .24$) and 62,998 ($82,892 * .76$) were assumed to be seasonal.
2. Divide migrant and seasonal workers into accompanied and unaccompanied categories.
 - a. Migrant: 65 percent of migrant workers reported unaccompanied status and 35 percent reported being accompanied by family. This translates to 12,931 unaccompanied migrant workers ($.65 * 19,894$) and 6,963 accompanied migrant workers ($.35 * 19,894$).
 - b. Seasonal: 35 percent of seasonal workers reported unaccompanied status and 65 percent reported being accompanied. This translates to 22,049 unaccompanied seasonal workers ($.35 * 62,998$) and 40,949 accompanied seasonal workers ($.65 * 62,998$).
3. Translate the number of accompanied workers into households. The number of households should be smaller than the number of workers, since a household may have more than one worker.
 - a. Accompanied migrant households: The average accompanied migrant household contained 1.8 farmworkers. This translates to 3,868 accompanied migrant households ($6,963 \text{ workers} / 1.8 \text{ workers per household}$).
 - b. Accompanied seasonal households: The average seasonal worker household contained 1.3 farmworkers. This translates to 31,499 seasonal worker households ($40,949 \text{ workers} / 1.3 \text{ workers per household}$).
4. Translate accompanied worker household counts into household members.
 - a. Accompanied migrant household members: The average accompanied migrant household had 3.8 members total. This translates to 14,700 accompanied migrant household members ($3,868 * 3.8$).
 - b. Accompanied seasonal household members: The average accompanied seasonal household had 4.1 members total. This translates to 122,846 accompanied seasonal household members ($31,499 * 3.9$).
5. Because unaccompanied workers are by definition households of one, the counts of unaccompanied workers, households and household members are all the same.

The use of the NAWS data for this purpose is subject to a number of limitations. The NAWS sample is small and may underrepresent citrus workers in Florida. Moreover, the most recent data available are from the 2015-2016 surveys. Given rapid changes in Florida's agricultural sector, particularly the loss of citrus activity due to greening disease and sharp increases in the use of H-2A workers, breakdowns by migrant/seasonal and accompaniment status may have changed substantially since the NAWS interviews were conducted.

⁷ H-2A workers were assumed to be unaccompanied.

Commercial Fishing Workers

This section of the Rental Market Study discusses the affordable housing needs of commercial fishing workers in Florida. The 2019 study uses a different method to estimate the number of fishing workers than previous Rental Market Studies. Therefore, results are not comparable to earlier years.

According to this new method, Florida has an estimated need for 1,093 units of affordable rental housing for commercial fishing workers. County-level estimates are not available due to limitations of the data sources, as described below.

Previous Methodology

Past years' studies restricted the fishing worker analysis to estimates of low-income (at or below 60 percent of AMI), cost burdened (greater than 40 percent) renters from the American Community Survey (ACS) with at least one person with a U.S. Census occupational code of 610, which includes "Fishers, Hunters, and Trappers." We are modifying the method for three reasons. First, the ACS is based on a sample of Florida households. The 2013-2017 ACS sample is not large enough to yield statistically significant counts for such a specific set of parameters (renter tenure, incomes below 60 percent of AMI, and a single, relatively small occupational category). Second, limiting the estimate to renters excluded other fishing workers who might have a need for affordable rental housing, such as those living doubled up with a homeowner or those living in substandard, non-rental units.⁸ Third, experts from University of Florida's Sea Grant program recommended including aquaculture and seafood processing workers in the fishing worker estimate. Most workers in these industries would not be included in the "Fishers, Hunters, and Trappers" occupational code used previously.

Current Methodology and Estimate

The new method for producing an estimate of fishing workers' rental housing needs is as follows:

1. Determine the number of low-income households in the ACS with at least one worker in the industry categories that include fishing-related firms.

We used the 2013-2017 ACS to estimate the number of households with incomes below 60 percent of AMI and at least one worker in these Census industry codes:

- Fishing, Hunting and Trapping (Industry Code 0280): 805 households up to 60 percent AMI
- Animal Production and Aquaculture (Industry Code 0180): 5,074 households up to 60 percent AMI

⁸ Removing the renter restriction on the fishing worker estimate will make the method more consistent with the farmworker needs analysis. The farmworker analysis includes all farmworkers in the demand estimate regardless of their current housing tenure.

- Seafood and other miscellaneous foods, manufacturing (Industry Code 1280): 589 households up to 60 percent AMI.

These are statewide numbers. The sample size and geographic categories of the ACS microdata do not permit estimates at the county level.

2. Estimate the share of workers in these industry categories working in fishing, aquaculture and seafood production.

The Census industry categories include workers other than fishing workers. For example, Animal Production and Aquaculture includes workers on cattle ranches and other livestock farms. The Census does not provide subcategories of these industry codes that separate out the fishing-related jobs.

However, the North American Industry Classification System (NAICS) from the Bureau of Labor Statistics (BLS) does provide subcategories, and a crosswalk between Census and NAICS codes is available.⁹ The 2017 Quarterly Census of Employment and Wages (QCEW) from the BLS provides an annual average count of employees by NAICS code for the state. Therefore, we used the NAICS subcategories in the QCEW to calculate the ratio of fishing-specific employees to total employees in each of the three Census industry categories from the QCEW:

- Fishing, hunting, & trapping: 80.94% of employees work in fishing.
- Animal production and aquaculture: 8.02% of employees work in aquaculture.
- Seafood and other miscellaneous foods (manufacturing): 21.45% of employees work in seafood product preparation & packaging.

Again, these are statewide percentages. While the QCEW does provide data at the county level, employment numbers from many firms are suppressed at the county level for privacy purposes. Using the county-level data would result in substantial undercounts of fishing workers.

3. Use estimated worker shares in each industry to estimate low-income, fishing worker households.

We applied the QCEW percentages from step 2 to the ACS household totals in step 1 to estimate the shares of low-income households that work in fishing-related industries, as a subset of households with workers in the three overall industry categories.

⁹ See <https://www2.census.gov/programs-surveys/demo/guidance/industry-occupation/census-2012-final-code-list.xls>.

Table 8.1 Estimates of Low-Income, Fishing Worker Households, Florida

	A	B	C
Industry	Households 0-60% AMI (ACS)	Share of Employees in Fishing-Related Industry (QCEW)	Est. Households 0-60% AMI, Fishing Workers Only (A*B)
Fishing, Hunting & Trapping	805	80.94%	652
Animal Production & Aquaculture	5,074	8.02%	407
Seafood and other miscellaneous foods (processing)	589	21.45%	126
Total Estimated Fishing Worker Households			1,185

4. Subtract existing housing supply from demand to yield need for fishing worker units.

Florida Housing has 92 fishing worker set-aside units in the Atlantic Pines and Mariner’s Cove developments in Monroe County. Subtracting the supply (92 units) from the demand (1,185 fishing worker households) yields a need of **1,093 units**.