

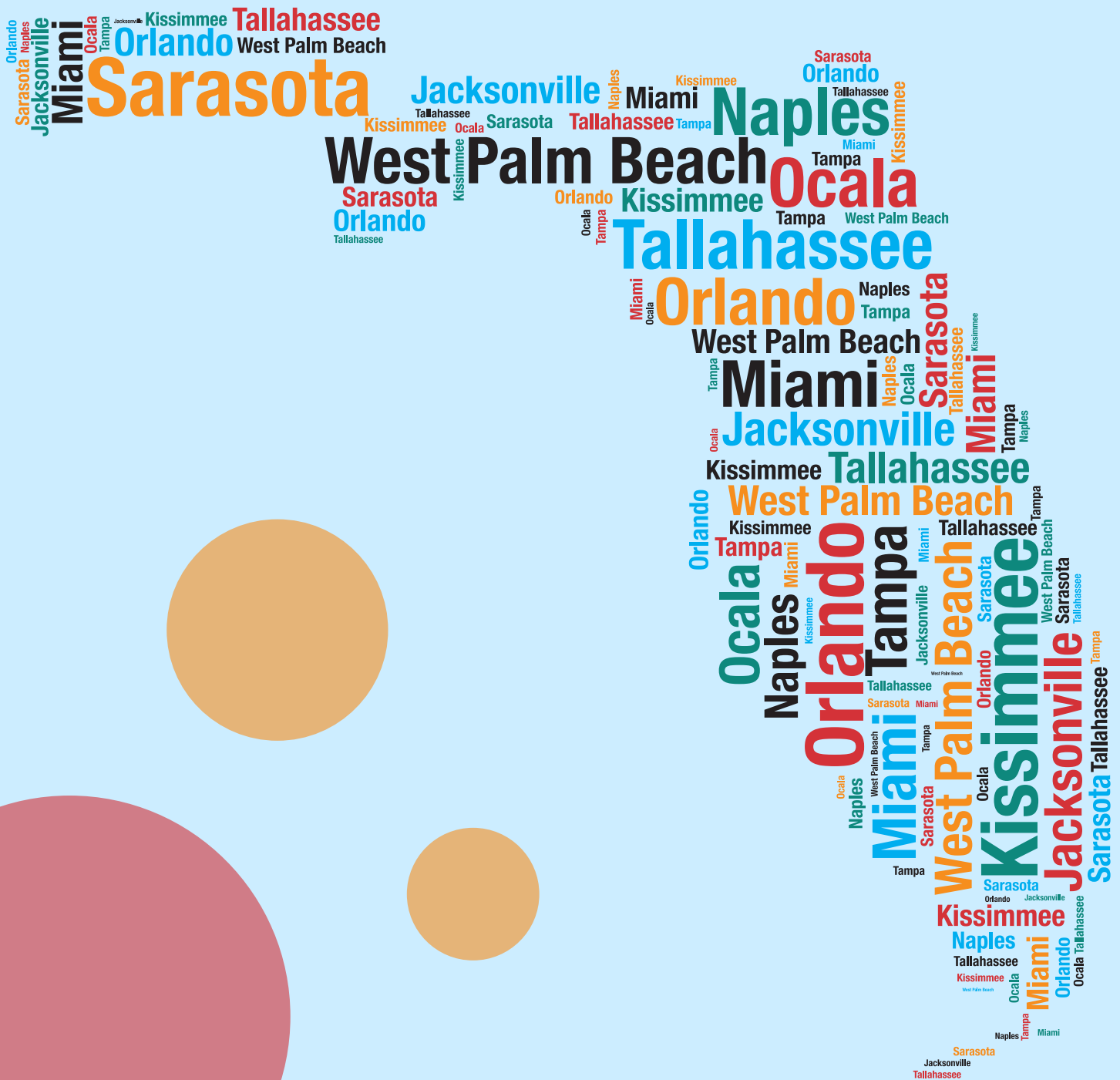


hispanicfederation

LATINOS IN CENTRAL FLORIDA

THE GROWING HISPANIC PRESENCE IN THE SUNSHINE STATE

Summer 2016



Acknowledgements

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A very special thanks is also owed to Luis Miranda, Nielsen's Latino/Hispanic Advisory Council Co-Chair, for his invaluable guidance and counsel in the shaping of this report.

Letter from HF President

Dear Friends,

Florida's connections to the Hispanic world are deep, dating back centuries before the founding of the United States. The peninsula has long been home to waves of immigrants and exiles from Spain and Latin America. Not surprisingly, today Florida is home to the third largest Latino population in the country. Nearly 5 million Latinos call the Sunshine State home, and their numbers are growing.

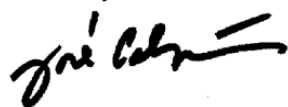
Florida's Latino population is also growing more diverse. In the second half of the twentieth century, areas such as Miami and Hialeah in South Florida became home to hundreds of thousands of Cuban exiles and migrants. Later, other Latin Americans began arriving in the state, including Nicaraguans, Colombians, Argentinians and Venezuelans. More recently, the migration of hundreds of thousands of Latinos from Puerto Rico to Central Florida is reshaping the contours of Latino life in the state, creating the most important demographic development since the arrival of Cubans in the 1960s.

Researchers have only recently turned their attention to these new arrivals and their impact on Central Florida. This report builds on their findings and supplements it with data on consumers provided by our partners at Nielsen. We are hopeful that it provides government officials, non-profits, the business sector and philanthropic leaders with the information they need in order to attend to this young and growing population.

We would be remiss to not mention the heartbreaking events in Orlando this past June, where 49 individuals were killed in one of the worst massacres in recent U.S. history. Yet this tragedy only highlights the changed demographic reality we describe in these pages, as the victims were mostly Latino and Latina LGBTQ individuals from Puerto Rico. The Hispanic Federation, as a service provider and capacity-builder with strong ties with the LGBTQ and larger Puerto Rican communities, is assisting this underserved population from our offices in Orlando right now.

We hope that you find this report useful, and invite you to work with us as we support and empower this growing and dynamic community. In doing so, we can ensure a brighter future for everyone in the Sunshine State.

Sincerely,

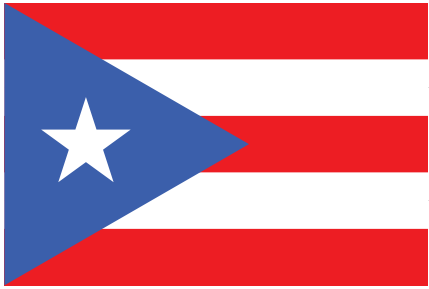


José Calderón

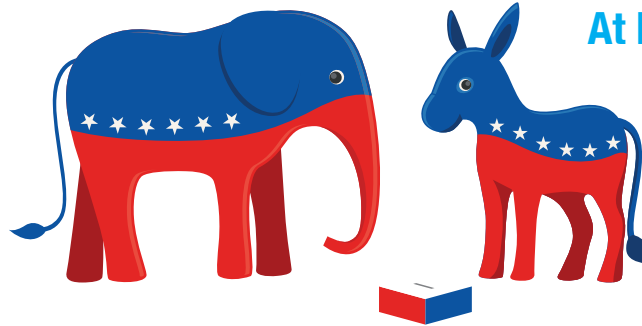
President

INTRODUCTION

Key Findings



There are approximately **1,000,000** Puerto Ricans living in Florida today



At least **30%** of Latinos in Orlando, Tampa and Central Florida say they aren't affiliated with a political party

In Orlando, Tampa and the rest of Central Florida, Latinos are more likely to work in **blue-collar** jobs than in **white-collar** jobs



One third of Latinos in Orlando, Tampa, and Central Florida say that they are not registered to vote



20% of Latinos in Orlando, Tampa and Central Florida are college graduates



Latinos between the ages of **18 and 34** account for **nearly half** of the Latino population of Orlando





Latinas account for the majority of the Latino populations in Orlando, Tampa and Miami.

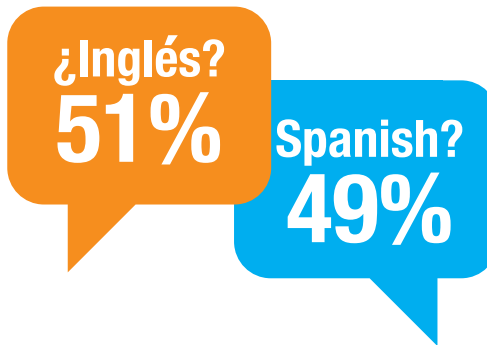
60% of Orlando's Latino population is female.



OVER

4.9 MILLION LATINOS CALL FLORIDA HOME

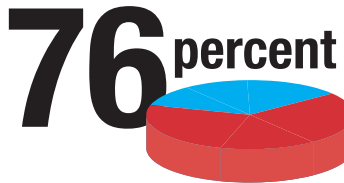
When it comes to owning smartphones and/or tablets, Latinos have much higher rates of ownership than Floridians as a whole



Latinos in Orlando and Central Florida are almost equally divided in terms of their language preference

Between 2000 and 2010

the Puerto Rican population in Florida grew by



72% Orlando
72% Tampa
70% Central Florida
Percentage of Latino households earning \$50,000 or less



nearly 1 out of every 10

Latinos in the United States lives in Florida

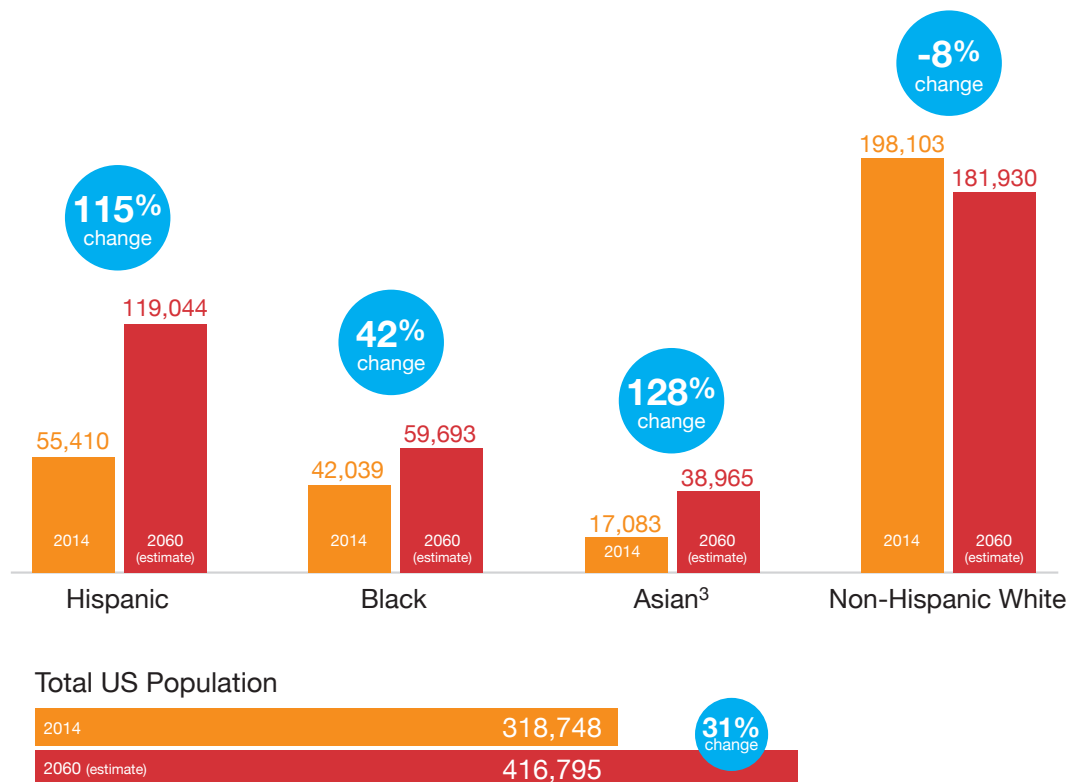
SECTION ONE

History and Key Demographics

The Growing Hispanic Presence in the U.S.

Over the last half-century, the United States has undergone a profound demographic transformation as Latinos emerged as the single most important driver of U.S. population growth. Between 1970 and 2015, the U.S. Hispanic population grew from 9.6 million to 55.4 million, an increase of more than 450 percent in less than 50 years. Latinos now account for 17.4 percent of the total U.S. population. By 2060, the number of Latinos is estimated to be nearly 120 million, or almost one-third of the total U.S. population.¹

TABLE 1
**Increase of the U.S. Hispanic Population
Compared to U.S. Total and Other Groups (in thousands)²**



¹ Colby, Sandra L. and Jennifer M. Ortman, Projections of the Size and Composition of the U.S. Population: 2014 to 2060, Current Population Reports, P25-1143, U.S. Census Bureau, Washington, DC, 2014.

² Colby, Sandra L. and Jennifer M. Ortman, Projections of the Size and Composition of the U.S. Population: 2014 to 2060, Current Population Reports, P25-1143, U.S. Census Bureau, Washington, DC, 2014.

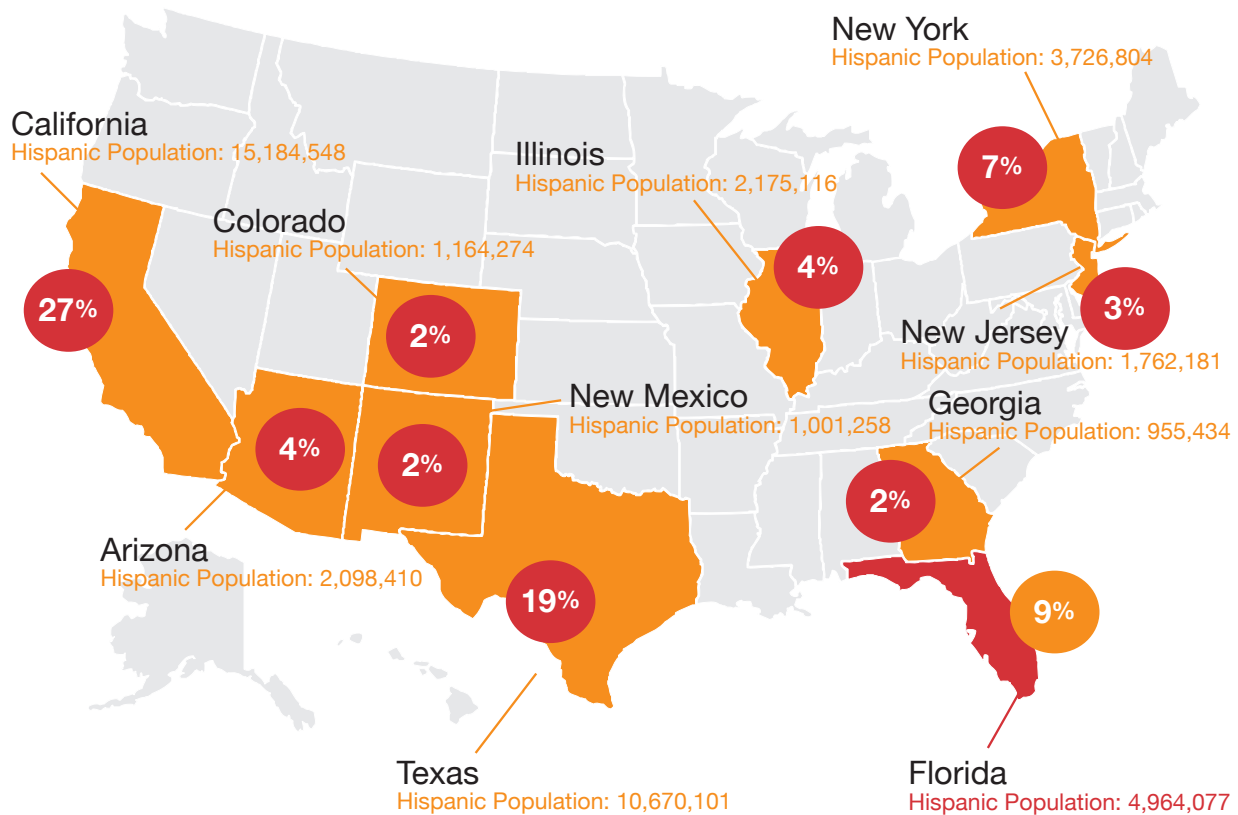
³ Although Asians are currently experiencing higher growth rates, the larger Hispanic baseline number combined with increased rates of growth are producing the higher Latino population estimates.



Florida and the U.S. Hispanic Presence

Where does Florida fit into this growing Hispanic presence? Florida’s connections to the Spanish-speaking world and its diaspora precede the founding of the United States. The state was an early site of exploration and conquest for Spanish explorers in the sixteenth century. In the intervening centuries, waves of Hispanic immigrants have settled in communities as diverse as Key West, Miami and Tampa.

TABLE 2
Largest Hispanic Populations by State, 2015⁴

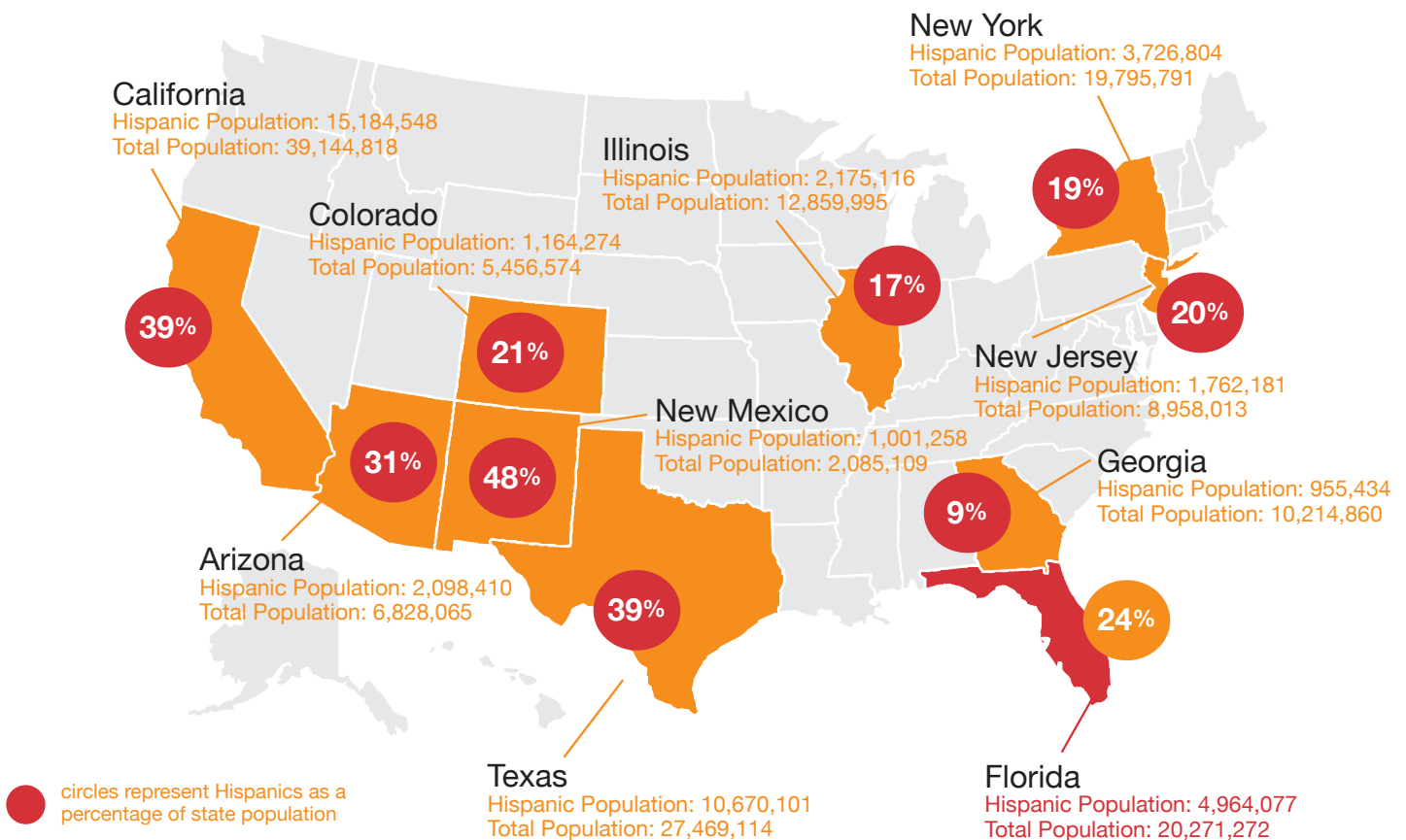


● circles represent the percentage of the total US Hispanic Population each state's Hispanic population comprises

⁴ U.S. Census Bureau, Population Division, Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States, States, and Counties: April 1, 2010 to July 1, 2015 Release Date: June 2016.

As a result, Latinos make up a significant share of Florida's total population. Nearly one out of every four Floridians is Latino. Of the states with the largest Latino populations in the United States, only in New Mexico, Texas, California and Arizona do Latinos account for a larger share of their state's respective population.

TABLE 3
**Latinos as a Share of Total State Population in
 Ten States with Largest Latino Populations, 2015⁵**



Today, Florida serves as an important bridge for commerce and immigration from Latin America and a destination for internal Latino migration in the United States. Given this history, it is not surprising that Florida's Hispanic population is one of the nation's largest. Nearly five million Latinos call Florida home.⁶ Nearly one out of every ten Latinos in the United States lives in Florida. Only California and Texas have larger Hispanic populations and account for larger shares of the U.S. Latino population.

⁵ U.S. Census Bureau, Population Division, Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States, States, and Counties: April 1, 2010 to July 1, 2015 Release Date: June 2016.

⁶ U.S. Census Bureau, Population Division, Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States, States, and Counties: April 1, 2010 to July 1, 2015 Release Date: June 2016.






Latino Subgroups in Florida

Beginning in the 19th century, the number of Latinos in Florida grew dramatically. Political instability and violence in Cuba led to the establishment of robust Cuban émigré communities in Key West and Tampa. The years after 1959 ushered in a new stage in the Latino history of Florida as hundreds of thousands of Cubans settled in Florida to escape the social and political upheaval of the Cuban Revolution. The state became home to the largest concentration of Cubans in the United States and fundamentally reshaped the contours of political, social and economic life in South Florida particularly. Today, more than two-thirds (approximately 68 percent) of all Cubans in the United States reside in Florida.⁷

Yet, despite the formidable presence of Cubans in Florida, the state’s Hispanic population has become increasingly diverse. While nearly one in three of all Hispanic Floridians are still Cuban, other Latino groups have grown since 2000. Even though the Cuban population has increased during the last 15 years, the rate of growth is below that of the Hispanic population as a whole and well below the percentage increase of the Mexican, and especially, the Puerto Rican communities in the state.⁸

TABLE 4
Percentage Change in Florida’s Hispanic Population and Cubans, Mexicans and Puerto Ricans, 2000-2014⁹

	2000	2014 (Estimate)	% Change
Total Hispanic Population	2,682,715	4,517,191	68%
 Cuban	833,120	1,331,893	60%
 Mexican	363,925	646,081	78%
 Puerto Rican	482,027	936,290	94%

⁷ López, Gustavo. 2015. “Hispanics of Cuban Origin in the United States, 2013.” Washington, D.C.: Pew Research Center, September.
⁸ U.S. Census Bureau, Population Division, Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States, States, and Counties: April 1, 2010 to July 1, 2014 Release Date: June 2015 and U.S. Census Bureau, Census 2000 Summary File 1.
⁹ U.S. Census Bureau, Population Division, Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States, States, and Counties: April 1, 2010 to July 1, 2014 Release Date: June 2015 and U.S. Census Bureau, Census 2000 Summary File 1.

The Puerto Rican Boom in the U.S. and Florida

It is the arrival of hundreds of thousands of Puerto Ricans to Florida, some from other communities on the mainland, others directly from the island, which is perhaps the most important shift in Florida's population to occur since the mid-twentieth century. There were nearly one million Puerto Ricans living in Florida in 2014. By 2020, Puerto Ricans are projected to surpass Cubans as the largest Hispanic group in the state; a shift that has the potential to reshape much of what we have traditionally understood about Florida's Hispanic community.¹⁰

Yet this was not always the case. The history of Puerto Rican migration to the mainland United States has historically focused on New York City. Starting in the 1920s and continuing through the 1970s, Puerto Ricans leaving the island made New York City their preferred destination. The impact of Puerto Ricans on the geography and development of New York is unmistakable. Places such as Los Sures in Brooklyn and El Barrio in Manhattan hold deep meaning for generations of Puerto Rican New Yorkers.

By 2020, Puerto Ricans are projected to surpass Cubans as the largest Hispanic group in the state

But in recent decades, there has been a shift in the geographic distribution of the Puerto Rican community in the United States. While the Northeast — with its long-established Puerto Rican communities in cities such as New York, Hartford, Connecticut and Newark, New Jersey — is still home to the largest share of the mainland Puerto Rican population, today it is the South, and particularly Florida, that is drawing Puerto Rican migrants from the island. Indeed, the South's share of the mainland Puerto Rican population doubled between 2000 and 2010.

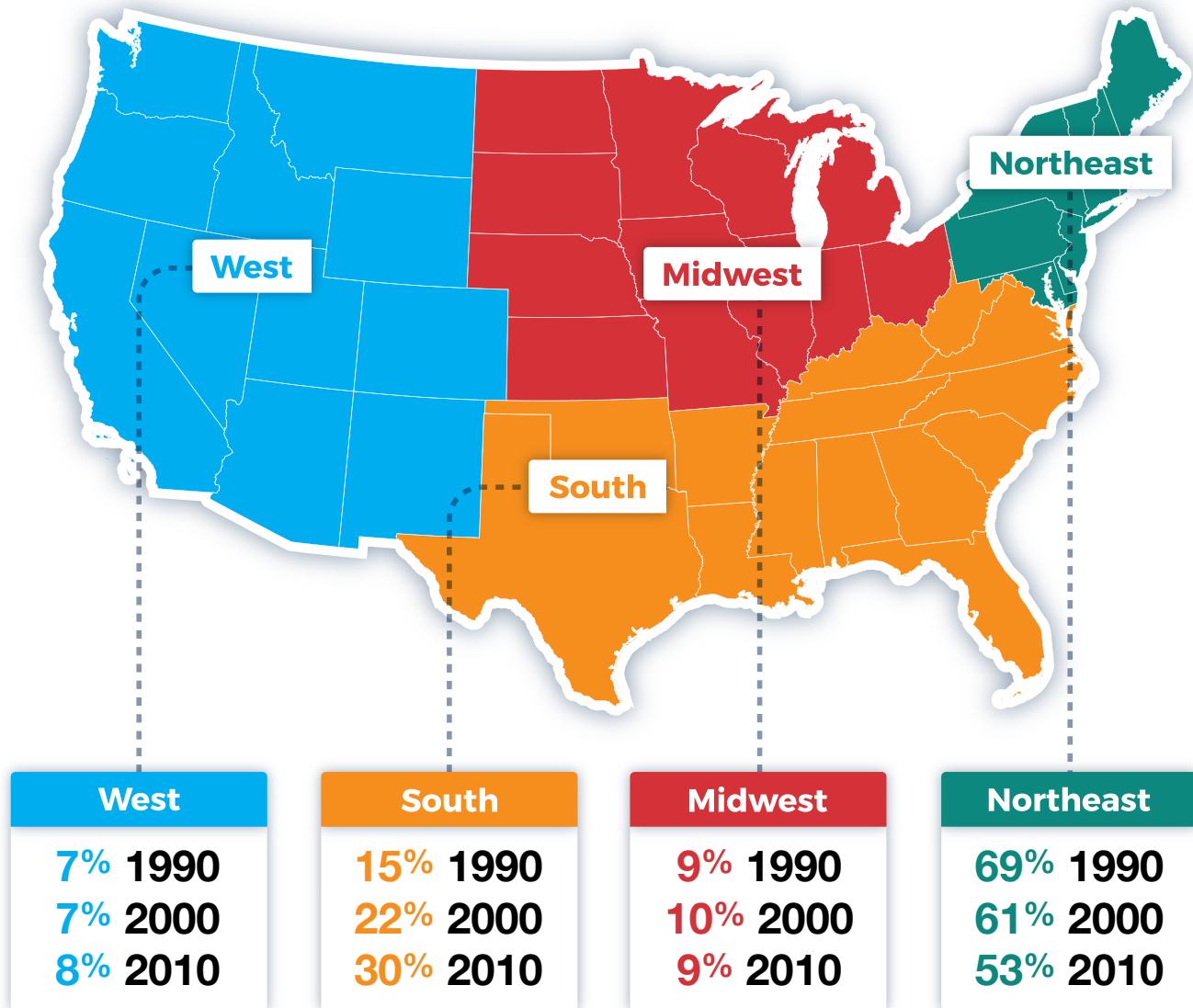
Nowhere in the South is the growing presence of Puerto Ricans more obvious or significant than in Florida. Between 2000 and 2010, the Puerto Rican population in Florida grew by 76 percent to nearly 850,000 persons. While the percentage growth of the Puerto Rican population may have been higher in other Southern states, in 2010 Florida accounted for a full 66 percent of all Puerto Ricans living in the South.¹² By 2020, it is projected that there will be more Puerto Ricans in Florida than in New York.¹³

¹⁰ Patricia Silver, "Puerto Ricans in Florida" in Edwin Meléndez and Carlos Vargas-Ramos, eds. *Puerto Ricans at the Dawn of a New Millennium*. (New York: Center for Puerto Rican Studies, 2014), 62.



TABLE 5

Regional Distribution of Puerto Rican Population in U.S., 1990-2010¹¹



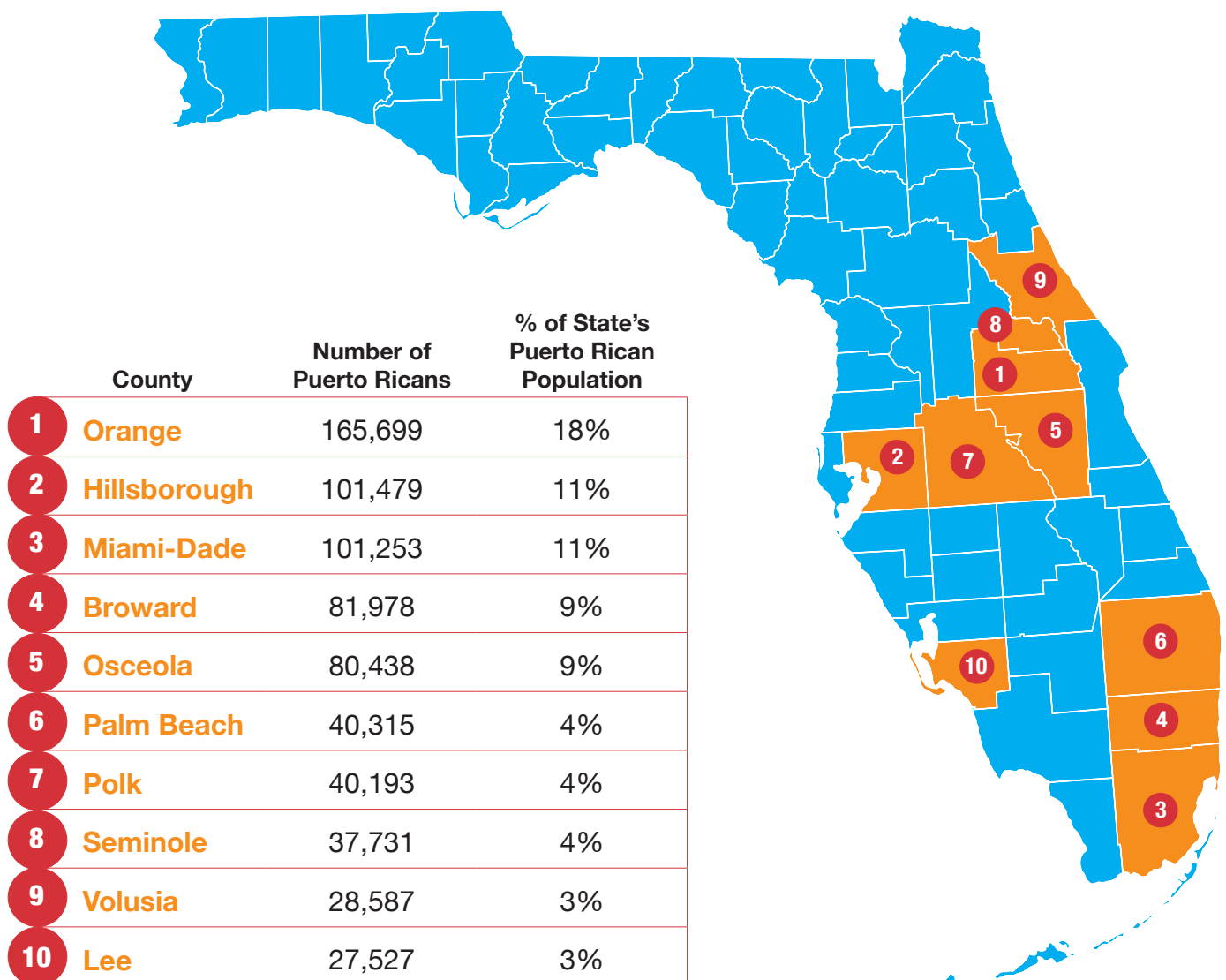
This dramatic influx of Puerto Ricans from the island is mainly in response to the commonwealth’s severe and ongoing economic crisis, solidifying what many are referring to as the Second Great Puerto Rican Migration; the first came after World War II. Facing limited opportunities at home, individuals and families are choosing to relocate to Florida, in particular Central Florida, instead of the Northeast. The reasons are varied. Some point to expanding economic opportunities in Florida’s professional, service, manufacturing and tourism sectors. Others point to Florida’s close proximity to Puerto Rico, or the fact that Florida’s climate more closely resembles that of the island. Whatever the case, the “pull factors” drawing Puerto Ricans to Florida are both real and powerful.

¹¹ Carlos Vargas-Ramos, “Patterns of Puerto Rican Settlement and Segregation in the United States, 1990-2010.” in Edwin Meléndez and Carlos Vargas-Ramos, eds. Puerto Ricans at the Dawn of a New Millennium. (New York: Center for Puerto Rican Studies, 2014), 42.
¹² Between 2000 and 2010, North Carolina’s Puerto Rican population grew by 131 percent, the largest increase in Puerto Rican population of any state in the South. Southern states include: Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Texas and Virginia. See Patricia Silver, “New Puerto Rican Disaporas in the Southern United States.” in Edwin Meléndez and Carlos Vargas-Ramos, eds. Puerto Ricans at the Dawn of a New Millennium. (New York: Center for Puerto Rican Studies, 2014), 84.
¹³ Carlos Vargas-Ramos, “Patterns of Puerto Rican Settlement and Segregation in the United States, 1990-2010.” in Edwin Meléndez and Carlos Vargas-Ramos, eds. Puerto Ricans at the Dawn of a New Millennium. (New York: Center for Puerto Rican Studies, 2014), 43.

In much the same way that Key West, Tampa, and Miami have long been associated with the historical migrations of Cubans to Florida, Puerto Rican settlement in the state has focused on a number of key geographic areas. More than three-quarters of all Puerto Ricans in Florida reside in just ten counties. And five of those counties account for nearly 60 percent of the state's Puerto Rican population.

TABLE 6

Ten Largest Counties by Puerto Rican Population, Florida, 2014¹⁴



¹⁴ U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates.



Of the five counties with the largest shares of the Puerto Rican population in Florida, three are located in Central Florida. And while fully one in ten of the state's Puerto Ricans live in the long-time Hispanic-heavy county of Miami Dade, nearly one in three of Florida's Puerto Ricans live in Orange County and neighboring Osceola County. In this way, the Puerto Rican boom in Florida is following a path distinct from the Cuban community, which is centered mainly in Miami-Dade and Broward counties.

The implications of Puerto Rican settlement in Central Florida are significant, and not just for electoral and commercial reasons. As one observer has noted, "Central Florida, where Puerto Ricans are most concentrated, sits geographically and metaphorically between "Old Florida" in the North and the strong Cuban and Hispanic presence in South Florida."¹⁵ Thus, Puerto Ricans by their very presence will geographically mediate between these two groups.



¹⁵ Patricia Silver, "Puerto Ricans in Florida" in Edwin Meléndez and Carlos Vargas-Ramos, eds. *Puerto Ricans at the Dawn of a New Millennium*. (New York: Center for Puerto Rican Studies, 2014), 63.

SECTION TWO

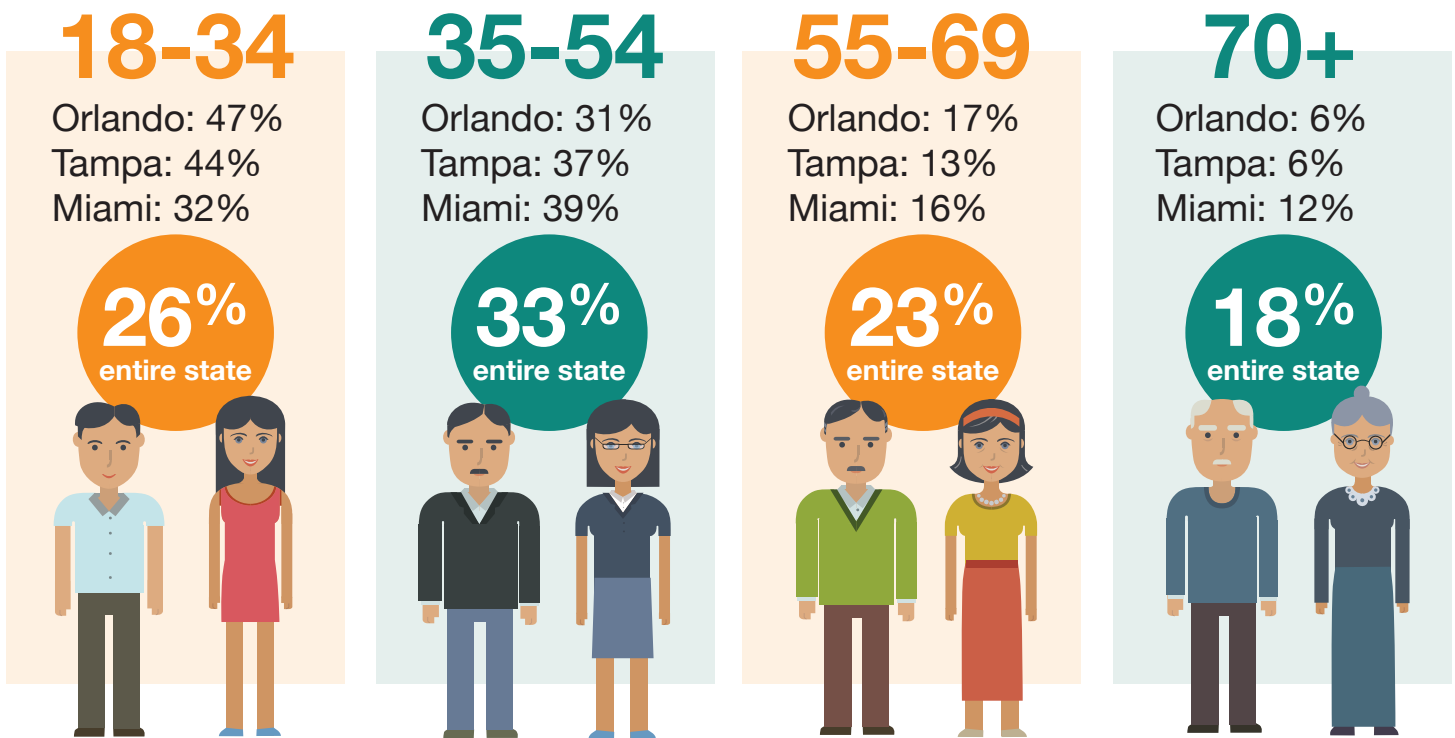
Inside the Latino Communities of Central Florida

Age Structure

When looking at the Latino communities of Florida one characteristic is particularly striking: its youth. Florida has long been known as a mecca for retirees and seniors from across the nation. In fact, no state in the nation has a higher percentage of persons over the age of 65 than does the Sunshine State.¹⁶ But when it comes to the Latino communities of Orlando and Tampa, or the Central Florida region as a whole, young people dominate. While millennials account for one quarter of Florida's total population, Hispanic millennials account for a significantly higher share of the Hispanic population in places such as Orlando and Tampa.¹⁷ What's more, the share of Latino millennials in places such as Orlando and Tampa is also higher than areas such as Miami, where Latinos of Generation X are the largest age cohort.

TABLE 7
Age Structure

Adults in Florida Compared to Latino Adults in Select Areas of Florida¹⁸



¹⁶ Two counties in Florida, Sumter and Charlotte, have the largest percentage of persons over the age of 65 of any counties in the United States. <http://www.pewresearch.org/fact-tank/2015/07/09/where-do-the-oldest-americans-live/>

¹⁷ Millennials are identified as those persons between the ages of 18 and 34.

¹⁸ Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

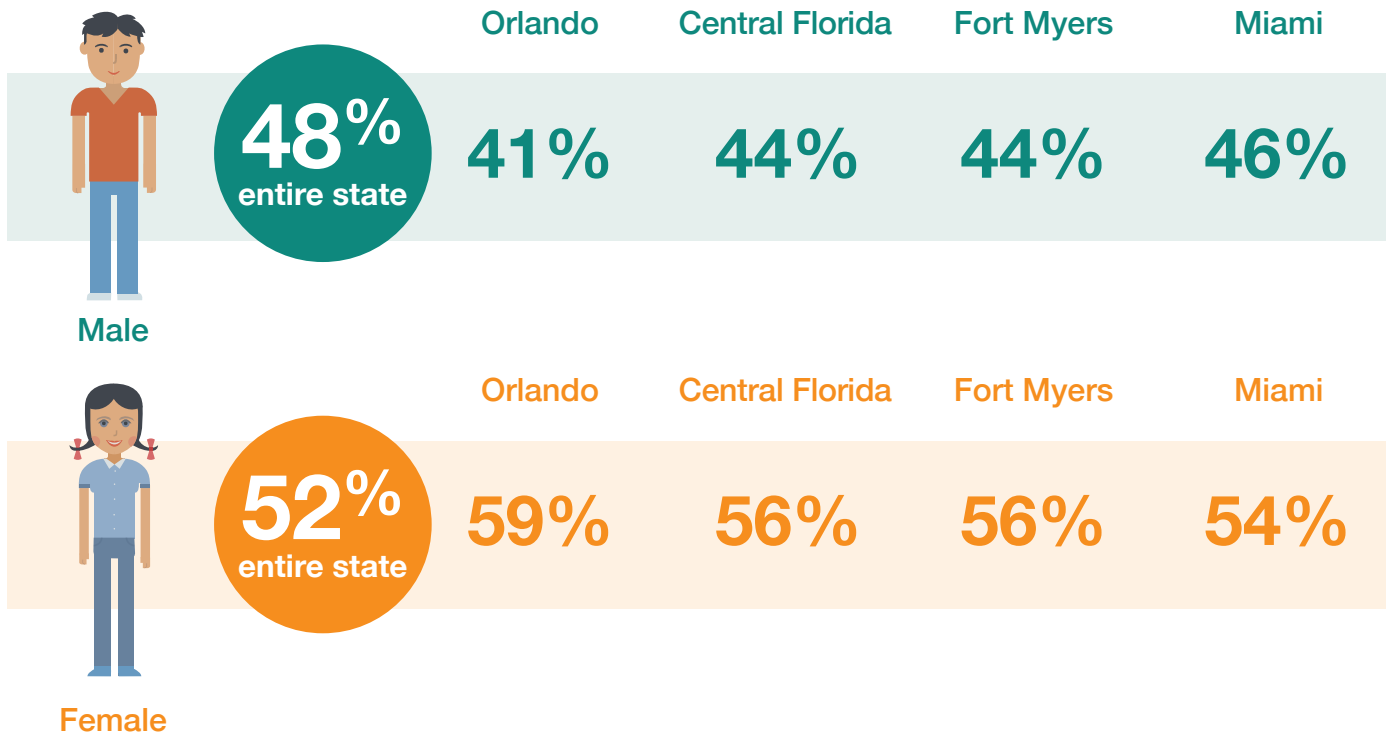


Gender Breakdown

As in most of the rest of the United States, women outnumber men in Florida by a margin of 52 to 48 percent. But in the Latino communities of the state, the gender differential is larger. In Latino communities in places such as Orlando, Fort Meyers, and the Central Florida region, there are significantly more Latina women than men. This gender differential among Latinos in Florida places the state at odds with national Latino demographic trends where Latino men hold a slight numerical advantage over Latinas.¹⁹

TABLE 8
Gender Structure

Adults in Florida Compared to Latino Adults in Select Areas of Florida²⁰



¹⁹ According to the Pew Charitable Trust, in 2014 Latino males represented 50.5 percent of the total U.S. Latino population, while Latinas represented 49.5 percent. http://www.pewhispanic.org/2016/04/19/statistical-portrait-of-hispanics-in-the-united-states/ph_2016_stat-portrait-hispanic-current-11/

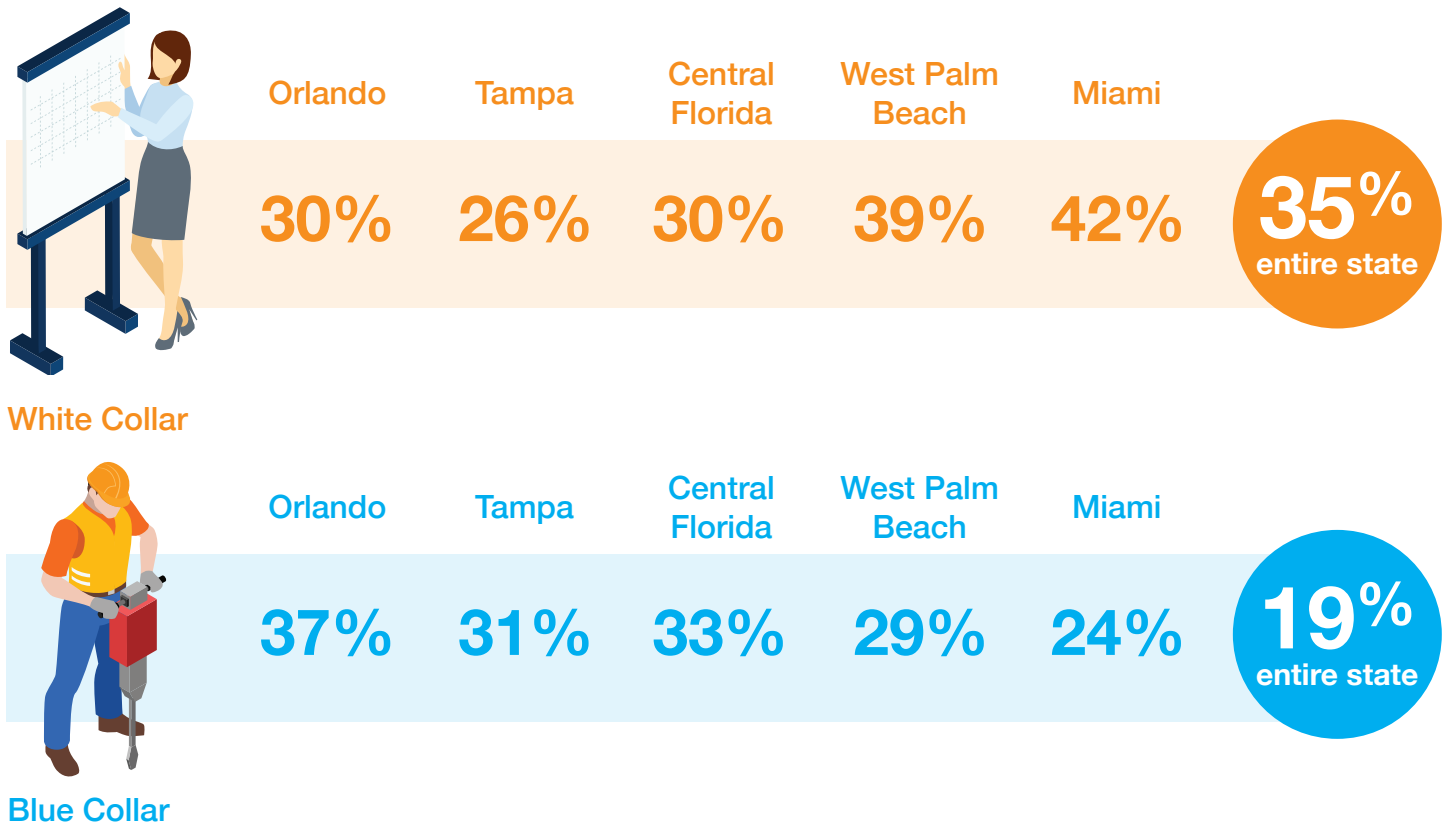
²⁰ Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

Household Income and the Latino Community

Nationally, Hispanic incomes lag far behind those of non-Hispanic whites, Asians and African Americans.²¹ Much of this discrepancy can be explained by the over-representation of Latinos in low-paying employment. Florida presents a complicated portrait of Latino employment and income. In areas such as West Palm Beach and Miami, the percentage of Latinos working in white-collar jobs is higher than that percentage of all Floridians working white-collar jobs. Nevertheless, in both of these areas the percentage of Latinos working blue-collar jobs is also higher than the percentage for the state as a whole.

Central Florida’s Latino communities, particularly Orlando, follow a different pattern. In Orlando, Tampa and the rest of Central Florida, Latinos are more likely to work in blue-collar jobs than in white-collar jobs.

TABLE 9
Occupational Distribution
 Adults in Florida Compared to Latino Adults in Select Areas of Florida²²



²¹ <http://www.pewhispanic.org/2016/04/19/statistical-portrait-of-hispanics-in-the-united-states/#workearningsincome>

²² Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015). The data on blue-collar versus white-collar workers is based solely on respondents who claim to be employed. Respondents who self-identified as “not employed” are excluded.



TABLE 10
Household Income
 Adults in Florida Compared to Latino Adults in Select Areas of Florida²³

Income	Florida (entire state)	Orlando	Tampa	Central Florida	Miami
Less than \$35,000	32%	40%	48%	44%	37%
\$35,000 - \$49,999	22%	32%	24%	26%	20%
\$50,000 - \$74,999	17%	16%	11%	13%	14%
\$75,000 - \$99,999	12%	6%	8%	8%	11%
\$100,00 - \$249,999	15%	7%	8%	8%	14%
\$250,000 or more	3%	0%	1%	1%	4%

The income impact of this division between blue and white-collar workers in Latino households in Florida is evident in Table 10. Statewide, 54 percent of Floridians earn less than \$50,000 per year. In some communities, such as Miami, Latino households trend closely with the statewide income breakdown. In Miami, 57 percent of Latino households earn less \$50,000 per year. But in the Latino communities of Orlando, Tampa and Central Florida, the pattern is significantly different from the statewide trend. More than two-thirds of Latino households earn \$50,000 or less in these areas (70% in Central Florida; 72% in Orlando and Tampa respectively).



The disparity in household income is also evident among high-earning households. Where 29 percent of Latino households in Miami earn \$75,000 or more per year, in Orlando, just 13 percent earn more than \$75,000 per year, and in Tampa and Central Florida just 17 percent earn that amount.






²³ Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

Language

More than 40 million residents of the United States speak Spanish. Between 1980 and 2013, the population of Spanish-speakers in the United States increased by more than 230 percent.²⁴ There are more Spanish-speakers in the United States than there are in Spain or in Colombia.²⁵ Only Mexico has more speakers of Spanish than the United States. Of those Spanish speakers, more than 3 million call Florida home.²⁶ Yet, data shows that there are important differences between language ability and language preference.

As Table 11 demonstrates, when asked which language they personally prefer to speak, 57 percent of Latino Floridians said they preferred to speak English only or English more than Spanish. Approximately 42 percent of the state's Latinos preferred speaking Spanish only or Spanish more than English. Yet, there were important regional differences. Latinos in Miami virtually inverted the statewide language preferences, with 57 percent of Latinos there preferring to speak Spanish only or Spanish more than English. Just 40 percent of Latinos in Miami preferred speaking English only or English more than Spanish. In contrast, the key Latino areas of Orlando and Central Florida found that half or more of Latinos in these areas preferred to speak English only or English more than Spanish. What's more, unlike Miami, where nearly three out of ten Latinos preferred speaking Spanish only, well under 20 percent of Latinos in Orlando and Central Florida said they preferred speaking Spanish only.

TABLE 11
Language Preference
 Total Latinos in Florida and Select Areas of Florida²⁷

	Florida	Orlando	Tampa	Central Florida	Miami
 Spanish Only	19%	14%	23%	17%	28%
 Spanish More Than English	23%	36%	29%	31%	29%
 English More Than Spanish	30%	26%	29%	27%	27%
 English Only	27%	24%	18%	24%	13%
 English and Spanish Equally	1%	0%	1%	1%	2%

²⁴ <http://www.pewresearch.org/fact-tank/2013/09/05/what-is-the-future-of-spanish-in-the-united-states/>

²⁵ <http://www.theguardian.com/us-news/2015/jun/29/us-second-biggest-spanish-speaking-country>

²⁶ <http://www.tbo.com/news/florida/more-than-27-of-floridians-speak-other-languages-20130806/>

²⁷ Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).



Yet, as we see in Tables 12 and 13, the differences in language preference among Florida Latinos also change depending on whether they are at home or away from home. In Miami, for example, nearly one-third of all Latinos say that they personally speak only Spanish at home, while only 20 percent of the city’s residents say they speak only Spanish away from home. In the areas of Orlando, Tampa and Central Florida, the percentage of Latinos who personally speak only Spanish at home is, like much of the State of Florida as a whole, less than 20 percent. More than 40 percent of Latinos in Orlando, Tampa and Central Florida personally speak English more than Spanish at home or speak English only.






TABLE 12
Language Personally Spoken at Home
 Total Latinos in Florida and Select Areas of Florida²⁸

		Florida	Orlando	Tampa	Central Florida	Miami
	Spanish Only	18%	16%	19%	17%	33%
	Spanish More Than English	34%	42%	41%	40%	38%
	English More Than Spanish	27%	26%	28%	27%	19%
	English Only	19%	15%	12%	16%	7%
	English and Spanish Equally	1%	1%	0%	1%	2%

²³ Nielsen, Scarborough, Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

Outside of their homes, Latino Floridians also have divided personal preferences. In Miami, as Table 13 shows, slightly more than half of all Latinos personally speak only Spanish or Spanish more than English away from home. By contrast, in Orlando, Tampa and Central Florida, more than 60 percent of Latinos personally speak only English or English more than Spanish away from home. In Orlando alone, nearly 75 percent of all Latinos speak only English or English more than Spanish while they are away from home.

TABLE 13
Language Personally Spoken Away from Home
 Total Latinos in Florida and Select Areas of Florida²⁹

	Florida	Orlando	Tampa	Central Florida	Miami
 Spanish Only	12%	10%	14%	11%	20%
 Spanish More Than English	21%	17%	22%	20%	31%
 English More Than Spanish	39%	47%	42%	42%	36%
 English Only	28%	25%	22%	26%	12%
 English and Spanish Equally	1%	0%	0%	0%	1%

²⁹ Nielsen, Scarborough, Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015)







Educational Attainment

Educational attainment indicators for Latinos are improving across the country. Fewer Latino students are dropping out of high school today than at any time in history and more Latinos are entering college than ever before.³⁰ Yet despite these improvements, Latinos still confront significant educational challenges. National data show that Latinos between the ages of 20 and 29 are much less likely to have a college degree than their non-Latino peers.³¹ In Florida, Latino educational attainment rates tend to follow national patterns.

As we see in Table 14, Latinos across the state are more likely to have no more than a high school diploma or to have not completed high school than their non-Latino Floridian peers. This is especially true in Tampa and Central Florida, where the percentage of Latinos who are high school graduates or less is significantly higher than the percentage of the state as a whole.

Latinos also lag behind other Floridians in the percentage of the population that are college graduates. While nearly 25 percent of all Floridians have a college degree, only one-fifth of Latinos in Orlando, Tampa and Central Florida are college graduates. It is noteworthy, however, that Latinos in Orlando and Miami have similar percentages of postgraduate and graduate degree holders as the rest of the state.

TABLE 14
Educational Attainment
 Adults in Florida Compared to Latino Adults in Select Areas of Florida³²

	Florida (entire state)	Orlando	Tampa	Central Florida	Miami
 High school graduate or less	45%	49%	58%	54%	52%
 Some college	31%	32%	22%	27%	26%
 College graduate, 4-year	14%	10%	15%	12%	12%
 Any postgraduate work or post graduate degree	10%	10%	5%	7%	10%

³⁰ Nielsen, Scarborough, Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

³¹ <http://www.pewresearch.org/fact-tank/2015/05/26/5-facts-about-latinos-and-education/>

³² <http://www.pewhispanic.org/2013/05/09/hispanic-high-school-graduates-pass-whites-in-rate-of-college-enrollment/>

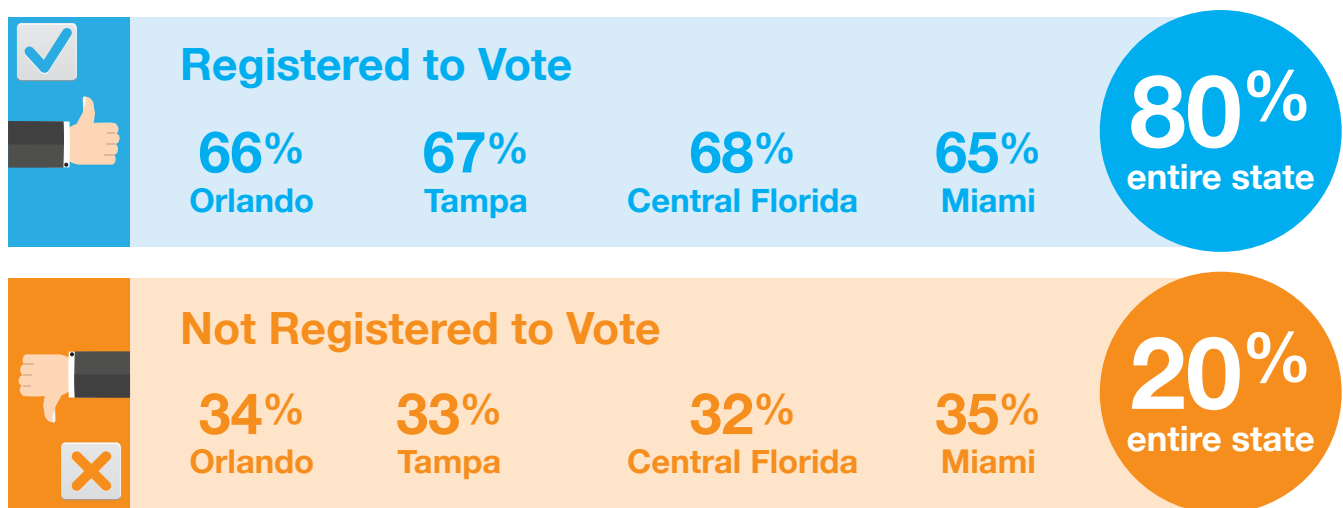
Political-Electoral Implications

For more than thirty years, Florida has played a critical role in national electoral contests. The state's booming population over these last decades has increased its share of congressional seats (12 to 27 seats since 1963) and electoral votes from 10 in 1960 to 29 in 2016. Not surprisingly, as Florida's Latino population has increased, so has the attention paid to the community by political campaigns; and with good reason. A recent study shows Latinos now account for nearly 20 percent of the Florida electorate.³³

Historically, much attention has been directed at the politically active Cuban exile and Cuban-American communities of Miami and Southeast Florida. But as the state's Latino population has become more diverse, so too has the state's Latino electorate. In 1990, Cubans accounted for nearly 48 percent of Florida's Latino electorate, but in 2014 they accounted for 30 percent.³⁴ This decline in the Cuban share of Florida's Latino electorate has had a profound impact on electoral politics in the state. Today, Florida offers one of the most diverse Latino electoral landscapes in the nation.

But beyond the diversity of the state's Latino electorate, there are some significant issues surrounding Latino political participation in the Sunshine State. The first is the discrepancy between the percentage of Floridians who are registered to vote and the percentage of Latinos who are registered to vote. Table 15 shows that while 80 percent of all Floridians are registered to vote in the district in which they live, the percentage of Latinos registered to vote is much lower. One third of Latinos in Orlando, Tampa, Central Florida and Miami say that they are not registered to vote.

TABLE 15
Residents Registered to Vote
 Adults in Florida Compared to Latino Adults in Select Areas of Florida³⁵



³³ Laird W. Bergad, *The Changing Demographics of Florida's Latino Electorate: Latino Party Affiliation and Voter Registration Rates in the State, Central Florida, and South Florida*. (New York: CUNY Graduate Center, 2016) <http://clacls.gc.cuny.edu/files/2016/03/CLACLS-CNNe-Report-3-The-Changing-Electorate-of-Florida.pdf>

³⁴ Ibid.

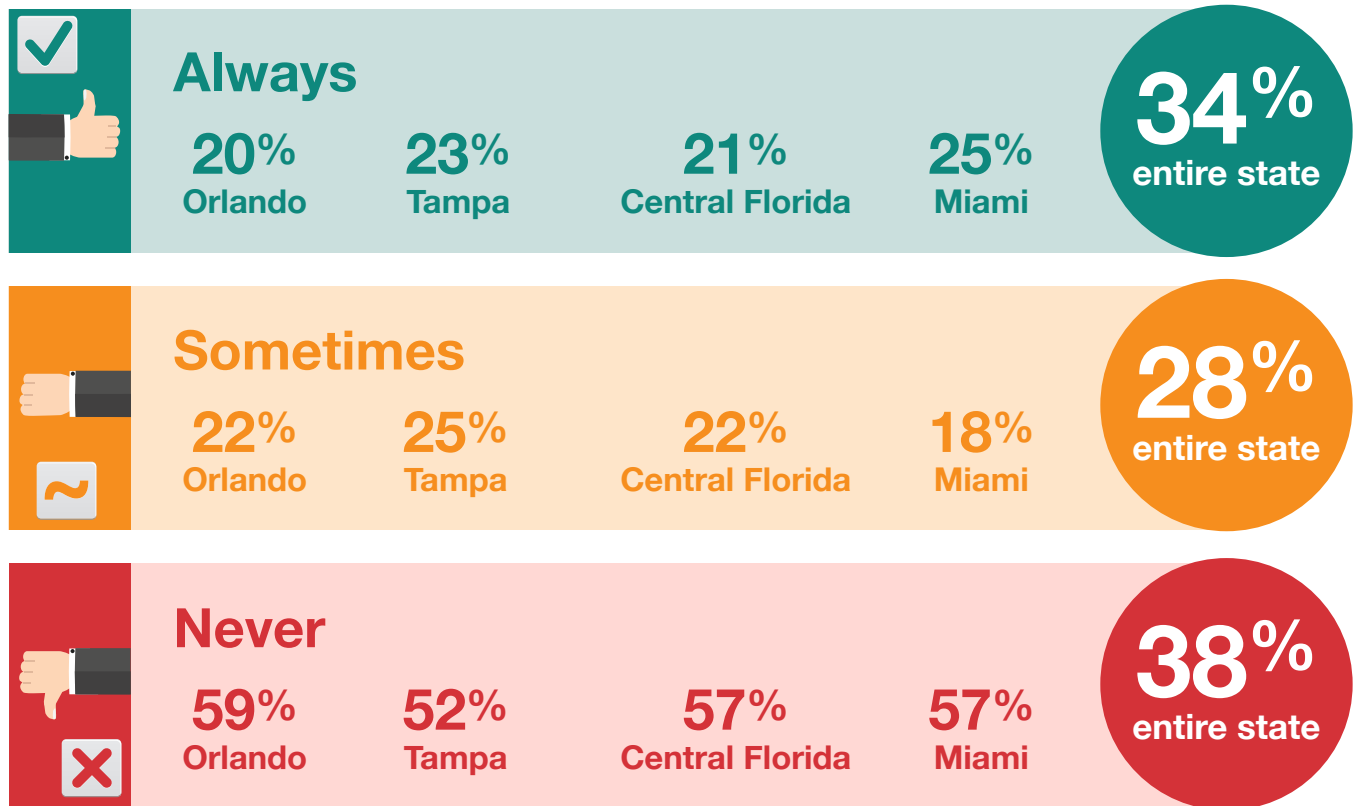
³⁵ Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).



TABLE 16

Voting in Local Elections

Adults in Florida Compared to Latino Adults in Select Areas of Florida³⁶



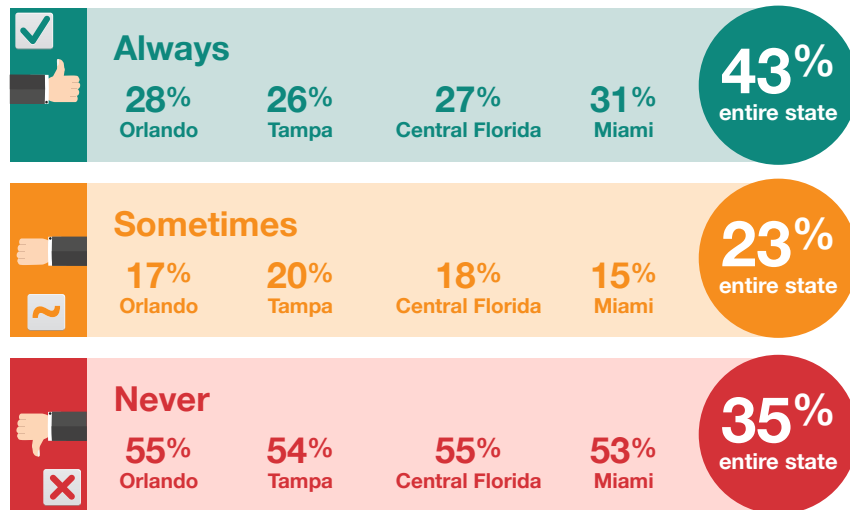
The discrepancy in voter registration translates into lower political participation for Latinos in Florida. Tables 15, 16 and 17 show the participation of Latinos in the electoral process in key communities in the state. The data in the tables suggest significant challenges when it comes to Latinos flexing their true political muscle in Florida. Table 16, for example, reveals that more than half of all Latinos in Orlando, Tampa, Central Florida and Miami say they never vote in local elections. In Orlando, just 20 percent of Latinos say they always vote in local elections, while 25 percent of Latinos in Miami do the same.

³⁶ Nielsen, Scarborough, Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

³⁷ Nielsen, Scarborough, Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

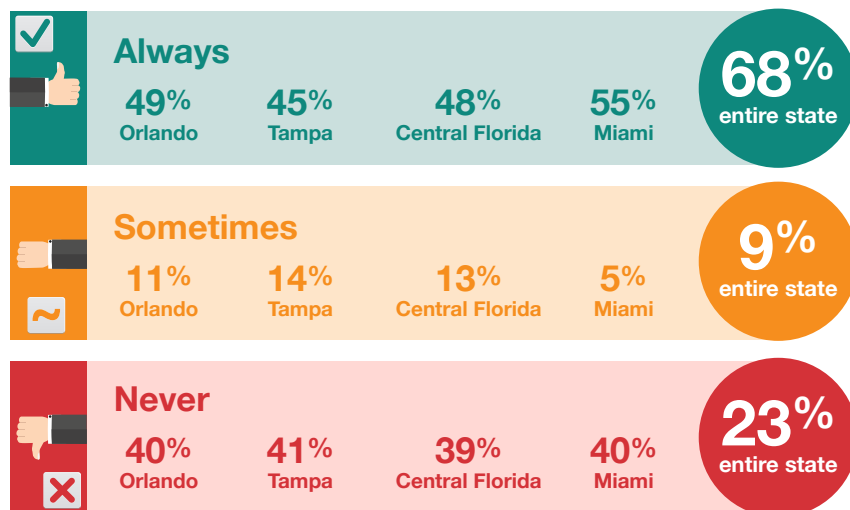
In statewide elections, the number of Latinos reporting that they vote increases but still lags behind that of Floridians as a whole. More than half of Latinos in the state say that they never vote in statewide elections.

TABLE 17
Voting in Statewide Elections
 Adults in Florida Compared to Latino Adults in Select Areas of Florida³⁷



Only in the case of presidential elections do we see a significant shift in the participation of Latino voters in Florida. As Table 18 shows, nearly or just slightly more than half of Latinos in Orlando, Tampa, Central Florida and Miami say that they always vote in presidential elections. Still, this is significantly less than the nearly 70 percent of total Florida residents who say that they always vote in presidential contests.

TABLE 18
Voting in Presidential Elections
 Adults in Florida Compared to Latino Adults in Select Areas of Florida³⁸



³⁷ Nielsen, Scarborough, Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

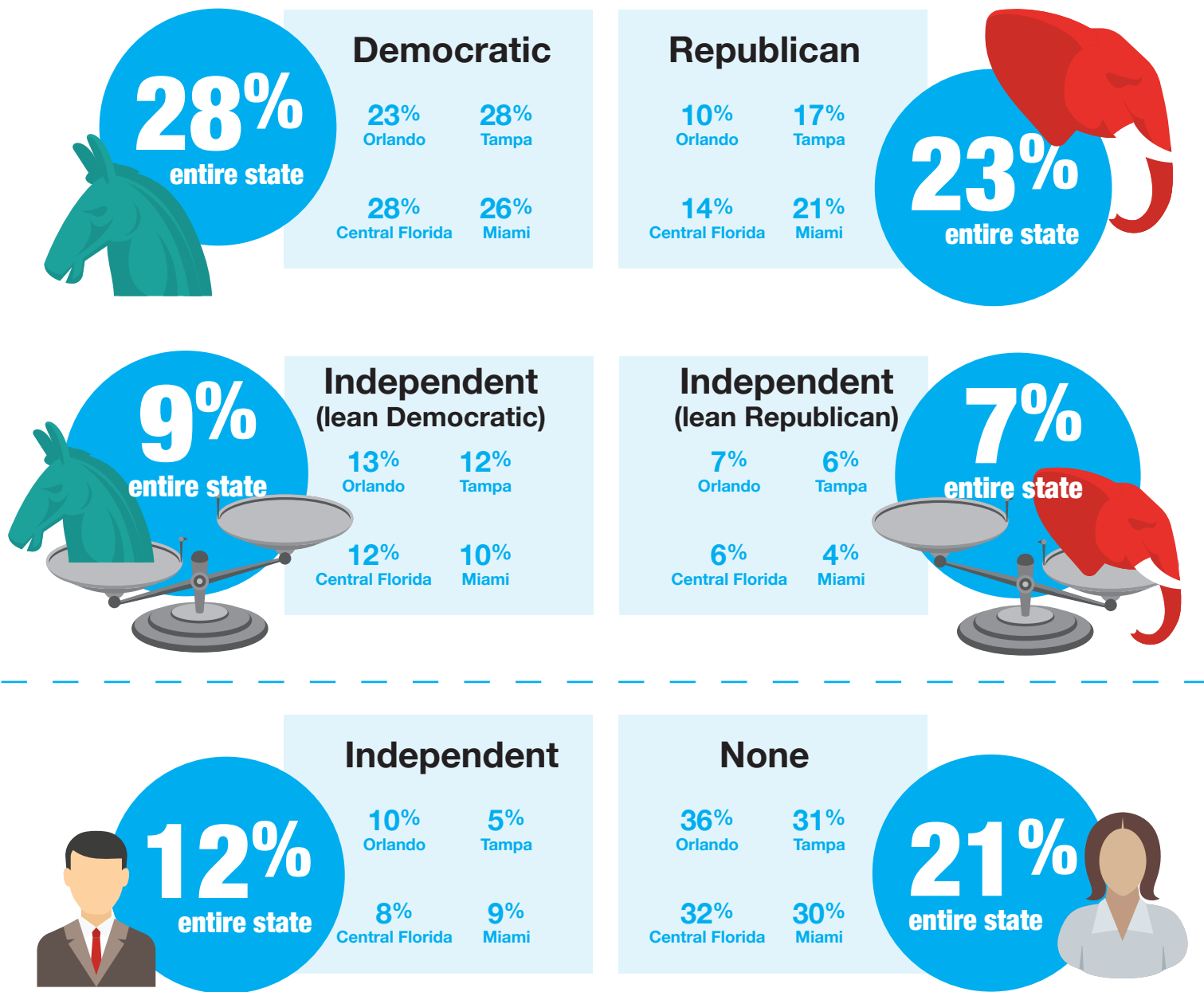
³⁸ Nielsen, Scarborough, Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).



TABLE 19

Self-Identified Party Affiliation

Adults in Florida Compared to Latino Adults in Select Areas of Florida³⁹



The lack of Latino engagement with electoral politics in Florida poses a number of important challenges. Without a powerful political voice, Latino concerns over education, health care, housing, and economic development run the risk of being set aside by elected officials. What’s more, alienation from the political process leads to fewer Latinos seeking elective office and providing adequate representation to their communities at the municipal, county, state and federal levels of government. This reality underscores the need for ongoing voter registration, education and outreach efforts that are community-rooted, Latino-led and focused on the long-term political empowerment of local communities.

³⁹ Nielsen, Scarborough, Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

SECTION THREE

Florida's Latinos and Technology

Digital Divide

Civic engagement depends on good communication. Understanding issues, connecting with like-minded citizens, organizing campaigns — all of these are contingent on reliable and consumer-specific communication.

Two decades ago, few things concerned policymakers, educators and Latino leaders as much as the “Digital Divide.” In Latino communities, where access to desktop computing was considered difficult, alarm bells rang that Latino youth in particular would be left behind during the 21st Century’s technological revolution.

Today, however, Latinos are at the vanguard of the digital movement in the United States. As a recent Nielsen report found, “Hispanics own more gadgets and spend a longer amount of time using their digital devices” than other Americans.⁴⁰ And it’s not just that Latinos own digital devices, it’s that they are using those devices to connect with others through social media and, increasingly, to consume all things digitally.

TABLE 20
Computer/Mobile Device Ownership
Adults in Florida Compared to Latino Adults in Select Areas of Florida⁴¹



40 <http://www.nielsen.com/us/en/insights/news/2014/digital-es-universal-how-us-hispanics-are-driving-growth-in-digital.html>

41 Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).



Ownership of these devices means that Latinos are using the Internet and visiting social media sites with increasing frequency. As we see in Table 21, Latinos in Florida tend to spend more hours on the Internet than Floridians as a whole. For example, 25 percent of Latinos in Orlando said that they spend 20 hours or more on the Internet each week, compared to 18 percent of Floridians in general. In Tampa, 32 percent of Latinos said that they spend 1-4 hours on the Internet each week, compared to 22 percent of all Floridians.

TABLE 21
Internet Usage Per Week
 Adults in Florida Compared to Latino Adults in Select Areas of Florida⁴²

Hours Per Week	Florida (entire state)	Orlando	Tampa	Central Florida	Miami
Less than 1 hour	4%	6%	3%	4%	5%
1-4 hours	22%	13%	32%	24%	26%
5-9 hours	20%	23%	20%	20%	19%
10-19 hours	17%	15%	11%	13%	17%
20 or more	18%	25%	16%	20%	12%
None	20%	19%	18%	19%	22%

⁴² Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

⁴³ <http://www.nielsen.com/us/en/insights/news/2014/digital-es-universal-how-us-hispanics-are-driving-growth-in-digital.html>

Internet usage by Latinos has translated into increased usage of social media and other internet-related technologies. In fact, in July 2013, Nielsen found that 95 percent of Latino smartphone owners used social media sites and apps. In Florida, it appears that using social networking technology is important to the state's Latinos, although there are significant differences between communities. As Table 22 indicates, about 20 percent of Latinos in places such as Tampa and Miami said they used social networking sites 1-2 hours per day, compared to just 11 percent of Orlando Latinos claiming a similar usage pattern. Conversely, 7 percent of Orlando Latinos claimed to spend more than 5 hours per day using online social networks, compared to just 2 percent of Tampa Latinos. While the social network usage data among Latino Floridians tends to run along similar lines as data usage percentages for Florida as a whole, there is a significant difference between Latinos in Orlando, Tampa, Central Florida and Miami and Floridians as a whole: the percentage of respondents who said they use social networking sites for less than one hour per day. Nearly forty percent of Latinos in these communities said that they use these sites for less than one hour daily, compared to 13 percent of Floridians in general.⁴³

TABLE 22
Daily Social Networking Site Usage Per Week
 Adults in Florida Compared to Latino Adults in Select Areas of Florida⁴⁴

Hours Per Week	Florida (entire state)	Orlando	Tampa	Central Florida	Miami
Less than 1 hour	13%	38%	37%	36%	36%
1-2 hours	20%	11%	22%	18%	22%
3-4 hours	19%	12%	10%	10%	10%
5 hours or more	13%	7%	2%	6%	3%
None	20%	32%	29%	31%	30%

⁴³ Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

⁴⁴ Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).



Beyond social networking sites, Latino Floridians are also slightly more likely than their non-Latino peers to get important information by using a mobile device. In Table 23, for example, we see that while 20 percent of Floridians claim to have used a mobile device to read a newspaper, among Latinos in Miami the percentage was 25 percent. In Orlando and Central Florida, the percentage of Latinos who said they read a newspaper on a mobile device was higher than that for Florida as a whole.

TABLE 23
Use of Mobile Device to Read Newspaper
 Adults in Florida Compared to Latino Adults in Select Areas of Florida⁴⁵



⁴⁵ Nielsen, Scarborough Hispanic DST Multi-Market 2015 Release 1 Total (Feb 2014 - Mar 2015).

Conclusion

The purpose of this report is to offer concerned readers with a snapshot of Central Florida's Latino communities using some of the nation's most valuable consumer data from our partners at Nielsen. The question for Hispanic Federation and our partners in Florida is, where do we go from here?

We believe that a number of important themes have emerged in our research. These themes should guide our collective work in serving this dynamic population.

Young People Are Driving Change

If one thing is glaringly obvious, it is that the burgeoning Latino population in Central Florida is disproportionately young compared to the rest of the state. To ensure a vigorous future for the region, we must collectively focus on expanding investments in the following areas: civic engagement, higher education and youth development.

- The large number of young people means the potential exists for new voters to enter the electorate. As such, a much greater amount of funding must be made available for Latino community-based organizations to conduct long-term civic engagement efforts.
- Latinos nationally face significant obstacles when it comes to college success. Florida is no exception. We must develop a shared agenda to overcome challenges to Latino student enrollment, retention and graduation.
- Given the paucity of such programs, investments to create youth-serving institutions and significantly increase youth development services are very much needed.

The Need to Expand Economic Security

While substantial numbers of Florida Latinos work in “white-collar” employment, majorities of Central Florida Latinos depend on “blue-collar” jobs. This economic bifurcation presents a number of opportunities for organized labor, policy-makers and businesses.

- Organized labor can expand its ranks by focusing on Latino blue-collar workers and helping these families secure their economic future.
- State and local governments must consider incentivizing living wage jobs in their economic development initiatives to grow the local tax base and support home ownership rebound.
- Businesses and marketers should think of offering products and services that appeal to a more working class Latino community
- Greater access to educational and skill-development opportunities is critical to help Latinos move up the economic ladder



Language Flexibility at Home and at Work

There is little doubt that Spanish continues to be an important language for Latinos in Florida. But it is also true that Latinos have mixed preferences for when they use Spanish instead of English.

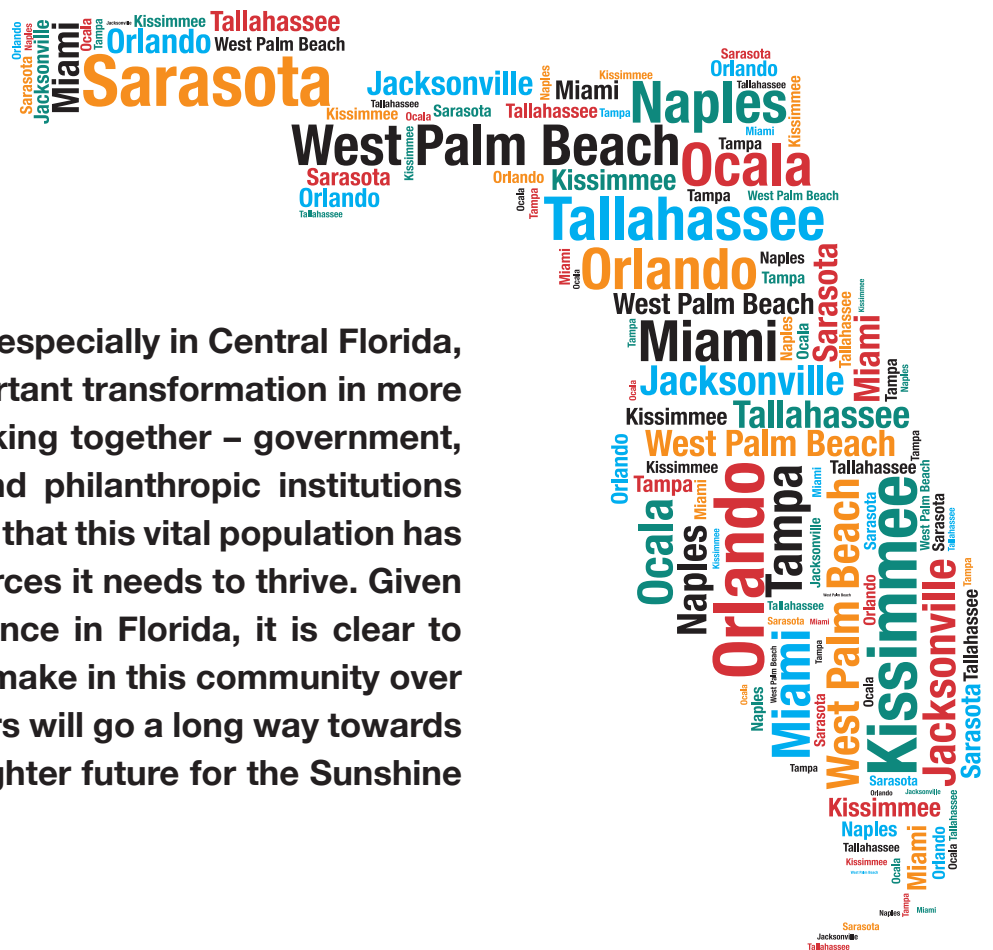
- Companies, marketers, government agencies and nonprofits must have the capacity to communicate with Latinos in ways that acknowledge and reflect language preferences including differences in the way Latinos approach Spanish-speaking at home versus at their place of employment.

Communicating with New Technologies

After decades of lagging behind other groups in the use of communication technologies, Latinos—especially young Latinos—now pride themselves on their ability to master fast-changing mobile communication technologies.

- Clearly companies, marketers, government agencies and nonprofits must expand efforts to connect with Latinos via smartphones, apps, and other mobile technologies, in addition to television.

Florida’s Latino community, especially in Central Florida, is undergoing its most important transformation in more than a half-century. By working together – government, nonprofit, private sector and philanthropic institutions and leaders – we can ensure that this vital population has the opportunities and resources it needs to thrive. Given the growing Hispanic presence in Florida, it is clear to us that the investments we make in this community over the coming months and years will go a long way towards securing a stronger and brighter future for the Sunshine State.





About HF

The Hispanic Federation (HF) is the nation's premier Latino nonprofit membership organization. HF uplifts millions of Hispanic children, youth and families annually through public policy advocacy, innovative community programs and strengthening Latino nonprofits. By working with a dynamic network of 100 Latino community-based organizations, HF is able to fulfill its mission to empower and advance the Hispanic community.

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