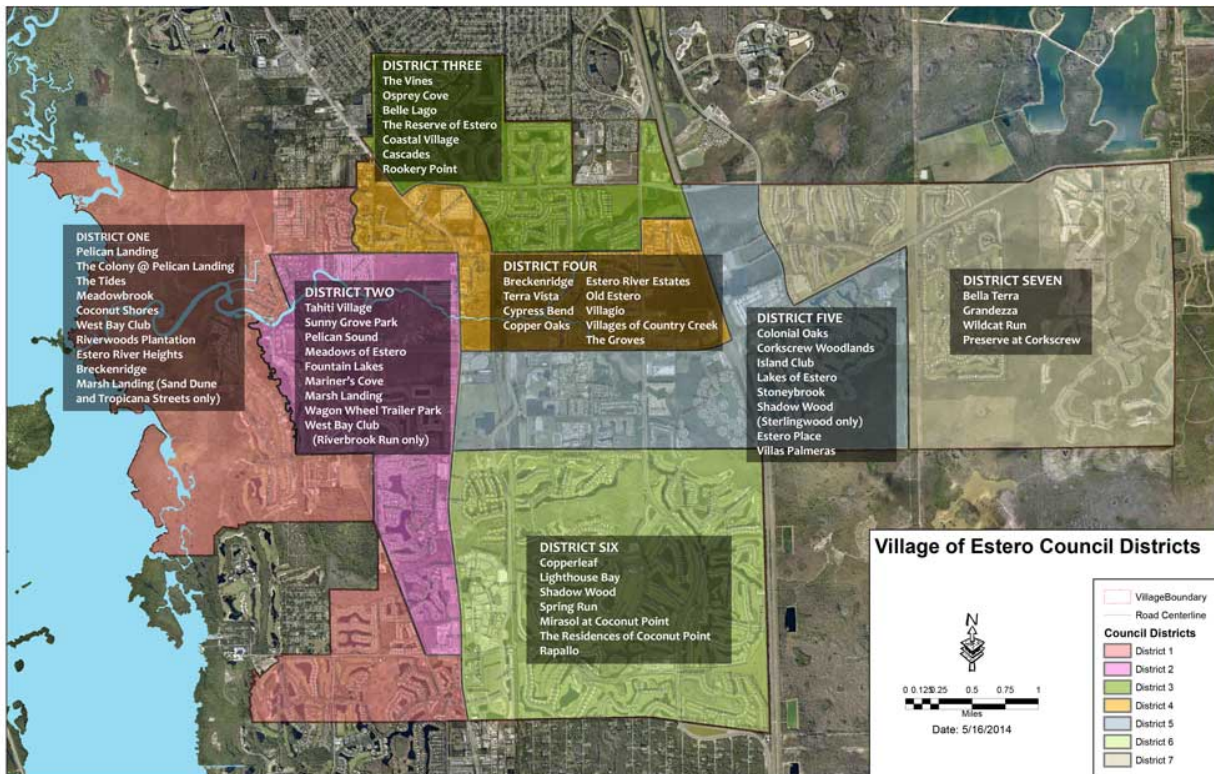

VILLAGE OF ESTERO

COMMUNITY NEEDS & ASSETS STUDY

FINAL REPORT



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I. Executive Summary

Data show that Estero is a largely homogenous area with regard to several demographic indicators such as age, race/ethnicity, and marital status. The village is a popular choice among seniors, particularly those in retirement, aged 60 and over. However, the number of family households has increased over the past few years. Population projections show increased growth among the 60 and over age group while smaller growth projections appear in other age categories.

Overall, residents are satisfied with their experience living in Estero. They believe a strong sense of community exists and they are optimistic concerning the future direction of the village. This can be viewed as a positive sign given the recent incorporation of Estero in January 2015. Primary resident concerns exist in the areas of transportation, pace of growth/development, quality education for children, and the development of a sense of identity in the village of Estero.

The topic most prescient topic amongst Estero residents concern a wide array of transportation issues (pg. 40). These issues include but are not limited to traffic patterns, access to public transportation, and the examination of bike paths and sidewalks. These topics were the ones most discussed by residents in both the focus group sessions and online survey.

Residents felt that development, both residential and commercial, has occurred at a rapid pace in Estero. Some residents feel this development has been undertaken without consideration of potential environmental impacts and/or community needs related to daily quality of life (pg. 42). The consistent aesthetic throughout Estero was seen as a positive among residents though many voiced displeasure with the exception provided to Hertz for their global headquarters building. Residents believe a more targeted approach towards the development of remaining lands should be undertaken given these considerations and the limited amount of available land left in the village.

Residents on the whole are satisfied with their experience living in Estero and with the future

potential of the village. Many residents commented on the small town feel of the village as a very positive feature. However, many feel that Estero currently lacks a sense of identity as well as a sense of community (pg. 43). The high number of gated communities and the lack of signage to signal the boundaries of the village were noted as weaknesses in these regards. Many suggestions for developing these items were presented by residents including the implementation of more community-based events and the development of “third spaces” on remaining lands where such events could be held.

Access to quality elementary, middle and secondary education was a major priority among residents (pg. 45); an unexpected finding given the high percentage of senior residents in Estero. This topic was seen as influencing the Residents propose that grassroots and legislative advocacy efforts need to be undertaken regarding school quality and school choice to promote a better sense of community and to attract more family households.

Members of the Estero Village Council and members of the Estero Council of Community Leaders (ECCL) received praise from residents. The passion and efforts of these individuals was seen as being crucial to the development of Estero as an incorporated village. However, with incorporation having occurred and officials having been elected, some residents expressed confusion concerning the roles of the existing community leadership (pg. 46). Questions were also raised regarding the possible redundancy and divergence that could arise if their roles are not clearly outlined and adhered to moving forward.

Access to quality health care services and professionals was seen as a positive in Estero (pg. 47). Residents expressed their pleasure with the number and availability of quality medical providers from various specialties. The need for a hospital was expressed by some residents though not as strongly as may have been considered. This is likely due to resident knowledge of plans by Lee Memorial Health Systems to establish the Coconut Point Medical Village in Estero.

II. Introduction and Study Context

Estero has seen a tremendous amount of growth in all areas in the past fifteen years. The full-time resident population has more than doubled with a percent change of nearing 140% from 2000 – 2010. This population estimate does not include the seasonal resident population which likely doubles the population estimate during seasonal months. This growth has led to population density more than doubling during this same time period. The population consists of a high percentage of seniors aged 60 and over who are likely choosing Estero as their retirement destination.

Arts and entertainment opportunities abound in Estero. Retail-focused centers such as Coconut Point Mall and Miromar Outlets provide ample opportunities for shopping and dining. Outdoor activities can be undertaken at the Koreshan Historical Site or Estero Community & Recreational Center as well as through access to the Estero River and Estero Bay.

Business and housing development has continued to increase despite impacts in both markets due to the housing market crisis and global recession. The addition of Hertz Global Headquarters is the primary example of business growth as is the addition of a Walmart store that will provide jobs to approximately 350 workers. Many smaller examples of business development are also present in the form of retailers, health care services, and food service outlets.

Current and planned housing development can be seen throughout the village such as with the Estero Commons project. Housing development has taken many forms including single-family residences, senior living, rental units, and assisted living facilities. This development has been met with mixed opinions from residents.

Specialty health care providers can be found throughout Estero. The Village remains without an acute care hospital with the closest such entity being approximately nine (9) miles from the mean center of Estero based on a straight-line distance estimate. Plans are currently in place by Lee Memorial Health

System to develop the Coconut Point Medical Village to address this need.

Study Context

In early March 2015, the Estero Community Improvement Foundation (ECIF) contracted Syntony Research and Consulting, LLC to conduct a community needs and assets study of Estero. The ECIF originally planned to focus the study on certain key thematic areas. The initial set of key thematic areas were 1) Environment, 2) Arts and Entertainment, 3) Transportation, 4) Economic Development, and 5) Health Care. In a larger sense, the ECIF was interested in compiling resident perceptions concerning quality of life in Estero.

This study was conducted in four phases in order to best narrow the scope of the study as well as derive the best available data both from existing sources and individuals working and residing in Estero. The phases of the study were as follows:

- Community Profile – the use of existing data sources and geographic information systems (GIS) technologies for the creation of a demographic profile as well as a spatial analysis of Estero;
- Key Informant Interviews – interviews with identified members of Estero community from each of the initial key thematic areas outlined for the study by the Estero Community Improvement Foundation for the purpose of narrowing the focus of the study;
- Focus Groups – group discussion sessions with residents of Estero to elicit their perspectives on the quality of life in Estero through a SWOC (strengths/weakness/opportunities/weaknesses) analysis; and
- Online Survey – a survey of Village of Estero residents to elicit their perspectives on the quality of life in Estero.

III. Phase One: Community Profile

Community Profile Methodology

The community profile primarily focused on key demographic variables associated with the full-time, non-seasonal population residing within Estero. The following narrative provides estimates (both historical and current) of the population along with projections of both population and housing for a twenty-five (25) year period up to year 2040. Multiple data sources were used to compile the demographic profile. All data was acquired between March 2015 and April 2015.

The 2010 Decennial Census Estimates and the American Community Survey (ACS) 2009 – 2013 5-year estimates were surveyed using the U.S. Census Bureau American Fact Finder tool to acquire data and/or estimates regarding characteristics of the target population. The *American Fact Finder* tool makes it possible to locate data for specific geographic locations in the United States. Three specific geographic types were reviewed including block groups for Lee County, census tracts for Lee County, and Estero as a Census Designated Place (CDP). While it was attempted to obtain the same data variables for all three geographies, some variables were not available for Estero as either no sample observations or too few sample observations were available for the U.S. Census Bureau to compute an estimate for some variables. While both the 2010 Decennial Census and ACS 2009 – 2013 5-year estimates were reviewed, it should be noted that the 2010 Decennial Census data is generally the most accurate data available. The ACS 5-year estimates include margins of error that in some cases may be high and therefore imprecise. However, of the three available estimates (1-year, 3-year, 5-year) the 5-year estimates are the most reliable and are best for analyzing small populations. Therefore, the 2010 Census has been primarily used in developing the demographic profile in this study while the 5-year estimates have been used where data was not available via the 2010 Census as well as for the creation of the thematic maps.

Population and housing projections for Lee County were gathered from the Shimberg Center for Affordable Housing. The Shimberg Center has developed a data clearinghouse containing projections from various agencies including but not limited to the Florida Bureau of Economic and Business Research, the U.S. Census Bureau, and the Florida Department of Revenue. Unfortunately, population and housing projections for Estero are not available through the Shimberg Center.

Data was also acquired from the Housing and Transportation Affordability Index (H & T Index). The H & T Index is compiled by the Center for Neighborhood Technology (CNT) using data from a combination of Federal sources and transit data. CNT uses a specific methodology to produce estimates on housing and transportation costs at the Census block group level for counties across the United States. Data for Lee County was acquired and is presented in this report.

Geographic information systems (GIS) technologies were employed to display the demographic dataset in a spatial context. Digital spatial data, known as shapefiles, were obtained from the U.S. Census Bureau in order to provide the best match with the demographic data. Spatial data was also obtained from the following sources:

- U.S Census Bureau;
- Florida Department of Transportation;
- Lee County Geographic Information Services Department; and
- Spikowski Planning and Criterion Planners¹.

Thematic maps were been created using these estimates and projections to provide a spatial context to the descriptive data. These maps are noted in the narrative and included at the end of this report as appendices.

¹ The Spikowski Planning spatial data was part of a Lee County land-use scenario project conducted during 2013 -2014 in collaboration with Jacobs Engineering and city/county planners. The spatial data involved the use of traffic zone shapefiles used to model specific variable projections such as employees and average travel times.

Creating these maps proved challenging due to current geographic designations via the U.S. Census Bureau. According to the U.S. Census Bureau, Estero consists of eleven (11) census tracts. These census tracts can be further broken down into twenty-six (26) census block groups. The census tracts either wholly or partly exist within the official State of Florida boundary for Estero as the official boundary intersects the official census tract boundaries. An approximation of the official boundary of Estero created using the GIS software shows where these issues exist [Map 1]. Further, it is not possible to reallocate the demographic estimates based on these discrepancies as detailed counts of the population within the divided sections of the geographies do not exist. Care should be taken in making interpretations of the data as the figures either may be under or over-represented because of the boundaries issue.

Community Profile Results

Estero has experienced a significant amount of full-time resident population growth since year 2000 [Table 1]. The number of individuals living in Estero more than doubled in the ten-year period between decennial census collections. Current estimates of the full-time resident population by Estero census tracts (American Community Survey [ACS] 5-year estimates, 2013) show the full-time resident population is more than double the 2010 Census count. Similar growth has occurred in the number of households and the number of families during that same period. A map showing the concentrations of the population by geographic location [Map 2] is located in the appendices.

Table 1 - Total Population

	2000	2010	2013	'00 – 10 Percent Change	'00 – '13 Percent Change
Individuals	9,503	22,612	48,345	137.9%	408%
Households	4,608	11,266		144.5%	
Families	3,338	7,490		124.4%	

Source: U.S. Census Bureau, 2000 & 2010 Decennial Census; ACS 2013 5-year estimates; Manual calculation

The seasonal population of Estero is difficult to capture, as no direct estimates are available. An indirect estimate of this population comes way of multiplying the number of vacant housing units identified as “seasonal, recreational, or occasional use” (SRO) by the average household size for occupied housing units. The addition of this estimate nearly doubles the population of Estero during season and does not account for seasonal residents who rent housing units during season.

Table 2 – Population Density

	2013
SRO Housing Units	8,783
Average Household Size – Occupied Housing Units	2.11
Estimated Seasonal Population	18,532

Source: ACS 2013 5-year estimates; Manual calculation

Estero is densely populated. Census Bureau officially lists the land area of Estero at 20.02 square miles. Population density has more than doubled since year 2000 according to Census Bureau estimates. The population density of Lee County, for comparison, is 788.7 persons per square mile.

Table 3 – Population Density: Estero CDP

	2000 (CDP)	2010 (CDP)	2013 (Tracts)
Individuals	9,503	22,612	48,345
Population Density	474.6	1,129.5	1,101.4

Source: U.S. Census Bureau, 2000 & 2010 Decennial Census; ACS 2013 5-year estimates

Estero is reflective of being a desired retirement destination. More than half of the population is aged 60 years and over [Table 4] with the median age of residents reported to be 62.2 years. This fits with results from the Center for Retirement Research at Boston College (2015) that 63 is the average retirement age for individuals. A map illustrating the residential location of individuals aged 62 and over in Estero can be found in the appendices [Map 3].

Table 4 - Population by Age Group: Estero CDP

	Count	Percent	Group Percent
Total population	22,612	100.0%	
Under 5 years	643	2.8%	10.6%
5 to 9 years	604	2.7%	
10 to 14 years	529	2.3%	
15 to 19 years	626	2.8%	37.4%
20 to 24 years	1,226	5.4%	
25 to 29 years	801	3.5%	
30 to 34 years	691	3.1%	
35 to 39 years	697	3.1%	
40 to 44 years	767	3.4%	
45 to 49 years	896	4.0%	
50 to 54 years	1,118	4.9%	
55 to 59 years	1,628	7.2%	
60 to 64 years	2,879	12.7%	54.7%
65 to 69 years	3,505	15.5%	
70 to 74 years	2,768	12.2%	
75 to 79 years	1,768	7.8%	
80 to 84 years	999	4.4%	
85 years and over	467	2.1%	

Source: U.S. Census Bureau, 2010 Decennial Census.

The population is largely homogenous in terms of race identification [Table 5]. The population primarily identifies as ‘White’ (95.2%) with much smaller percentages reported across all other categories.

Table 5 - Population by Race: Estero CDP

	Count	Percent
Total population	22,612	100.0%
White	21,530	95.2%
Black or African American	234	1.0%
American Indian and Alaska Native	28	0.1%
Asian	304	1.3%
Native Hawaiian and Other Pacific Islander	8	0.0%
Some Other Race	306	1.4%
Two or More Races	202	0.9%

Source: U.S. Census Bureau, 2010 Decennial Census.

Within the race categories, there is a small population (5.9%) that identifies as ‘Hispanic/Latino’ in terms of ethnicity [Table 6]. The two largest sub-identifications in this category are ‘Mexican’ (2.7%) and ‘Other Hispanic/Latino’ (1.9%).

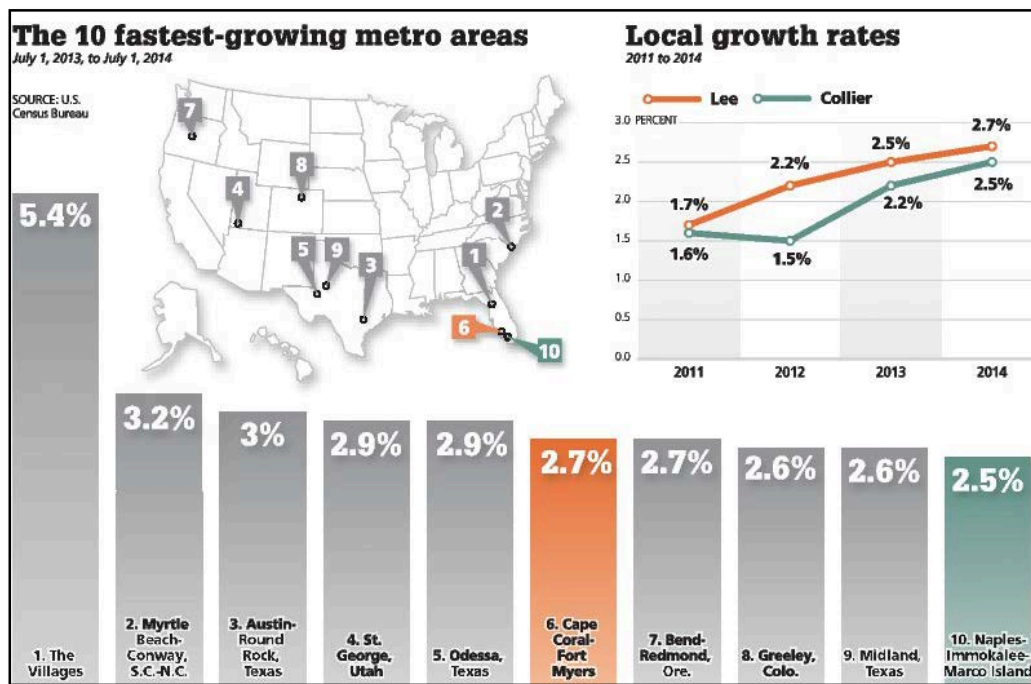
Table 6 - Hispanic/Latino Population: Estero CDP

	Count	Percent
Hispanic or Latino (of any race)	1,327	5.9%
Mexican	601	2.7%
Puerto Rican	165	0.7%
Cuban	136	0.6%
Other Hispanic or Latino	425	1.9%

Source: U.S. Census Bureau, 2010 Decennial Census.

Southwest Florida is one of the fastest-growing areas in the nation with Lee and Collier counties ranked in the top 10 of the nation's fastest-growing metro areas based on population increases from July 2013 to July 2014. Lee County added 18,177 people during that span, an increase of 2.7 percent, which is the sixth-largest increase in the country. The Census Bureau estimated the population of Lee County at 679,513 as of July 2014. Without a change in the growth rate through July 2015, the population of Lee County is estimated to be 697,860. This increase in Lee County’s population is expected to continue for the foreseeable future. According to projections from the University of Florida, Lee County is projected to have a population of more than 1 million individuals by year 2040, ranking it 7th out of Florida's 67 counties.

Figure 1 - Fastest Growing Metro Areas



Source: Fort-Myers News Press, April 2015

Current projections from the Florida Bureau of Economic and Business (BEBR) for Lee County project an increase of 55% in total population while the State of Florida will see an increase of 30% during this same period. Population projections are not available from this source for Estero. Projections were calculated utilizing a simple linear projection methodology based on the total population figure provided via the 2010 Decennial Census and the 3-year estimates provided via the American Community Survey for years 2011 through 2013 [Table 7].

Table 7 - Projected Total Population, 2010-2040

	2010	2013	2015	2020	2025	2030	2035	2040
Lee County	618,754	643,367	673,826	758,621	837,828	911,479	980,632	1,044,323
Estero	22,612	23,436	24,504	27,108	29,712	32,316	34,919	37,523

Sources: University of Florida Bureau of Economic and Business Research, Population Projections; U.S. Census Bureau; Researcher Calculated Projections

Projections by age group are available from BEBR only at the county or city level. The projections for Lee County are reported here [Table 8] to provide some indication of the population increases and decreases expected to occur through year 2040 by age group.

Table 8 - Population Projections by Age Group (Lee County)

	2015	2020	2025	2030	2035	2040	2015 – 2040 % Change	2015 – 2040 # Change
0-4	35,351	38,738	43,600	46,871	50,552	52,781	49.3%	17,430
5-9	35,715	38,515	42,160	47,523	49,989	54,437	52.4%	18,722
10-14	36,227	39,951	42,026	44,744	50,923	52,364	44.5%	16,137
15-19	35,678	40,518	43,200	44,716	47,525	53,581	50.2%	17,903
20-24	38,150	38,731	45,198	45,596	49,074	49,606	30.0%	11,456
25-29	37,402	42,588	44,762	49,006	51,568	52,721	41.0%	15,319
30-34	37,268	43,221	48,317	49,950	54,580	56,794	52.4%	19,526
35-39	35,015	42,379	47,939	53,161	54,540	59,370	69.6%	24,355
40-44	36,594	39,044	46,369	51,835	57,456	58,391	59.6%	21,797
45-49	39,064	40,326	43,008	49,560	56,815	61,000	56.2%	21,936
50-54	45,799	43,322	46,062	46,222	56,324	61,089	33.4%	15,290
55-59	49,852	52,509	53,254	51,030	55,742	62,393	25.2%	12,541
60-64	49,579	60,426	65,616	62,384	62,423	64,586	30.3%	15,007
65-69	50,793	60,213	68,169	77,811	69,715	73,089	43.9%	22,296
70-74	42,220	56,796	58,496	75,043	75,558	76,299	80.7%	34,079
75-79	27,886	40,850	45,732	56,053	60,645	72,531	160.1%	44,645
80-84	22,003	20,835	29,237	34,120	43,126	45,653	107.5%	23,650
85+	19,230	19,659	24,683	25,854	34,077	37,638	95.7%	18,408
Total	673,826	758,621	837,828	911,479	980,632	1,044,323	55.0%	370,497

Source: University of Florida Bureau of Economic and Business Research, Population Projections.

Lee County will see its most significant population growth in the age groups 70 years of age and over. Out of the eighteen age groups listed in the table, the four most senior age ranges will account for 33% of the total population increase.

Households² in Estero [Table 9] are more likely to include an individual aged 65 and over (54.7%) while being less likely to include children under the age of 18 (10.3%). The average household size is approximately two (2) persons. Approximately 14% of the ‘Nonfamily’ households include householders aged 65 and over who live alone. A map illustrating the residential location of all individuals aged 65 and over living alone [Map 4] as well as maps for males 65 and over living alone [Map 5] and females aged 65 and over living alone [Map 6] can be found in the appendices. Further, there are a large number of individuals aged 65 and over with a disability living in Estero [Map 7]. Taken together, these variables could be used to consider specific social and health-related program planning for seniors as was recently developed in Naples (Jewish Family & Community Services, 2015).

Table 9 - Households by Type: Estero CDP

	Count	Percent
Total households	11,266	100.0%
Households with individuals under 18 years	1,161	10.3%
Households with individuals 65 years and over	6,158	54.7%
Average household size	2.01	
Family households	7,490	66.5%
With own children under 18 years	1,062	9.4%
Husband-wife family	6,876	61.0%
With own children under 18 years	822	7.3%
Male householder, no wife present	191	1.7%
With own children under 18 years	71	0.6%
Female householder, no husband present	423	3.8%
With own children under 18 years	169	1.5%
Average family size	2.34	
Nonfamily households	3,776	33.5%
Householder living alone	2,923	25.9%
Male	1,083	9.6%
65 years and over	494	4.4%
Female	1,840	16.3%
65 years and over	1,066	9.5%

Source: U.S. Census Bureau, 2010 Decennial Census.

² The U.S. Census Bureau defines a household as the related family members and all the unrelated people who occupy a housing unit; with a housing unit defined as a house, an apartment, or other group of rooms, or a single room. Family households" consist of a householder and one or more other people related to the householder by birth, marriage, or adoption. 'Nonfamily households" consist of people living alone and households that do not have any members related to the householder.

Income estimates for Estero [Table 10] show that the mean household income is significantly higher than either Lee County (\$67,429) or the State of Florida (\$66,368). The distribution of income is spread across income ranges.

Table 10 - Income and Benefits (in 2013 inflation-adjusted dollars): Estero CDP

	Estimate	Margin of Error	Percent
Total households	10,780	+/-537	
Less than \$10,000	401	+/-135	3.70%
\$10,000 to \$14,999	224	+/-105	2.10%
\$15,000 to \$24,999	863	+/-237	8.00%
\$25,000 to \$34,999	1,099	+/-265	10.20%
\$35,000 to \$49,999	1,397	+/-215	13.00%
\$50,000 to \$74,999	1,999	+/-249	18.50%
\$75,000 to \$99,999	1,084	+/-190	10.10%
\$100,000 to \$149,999	1,669	+/-227	15.50%
\$150,000 to \$199,999	1,002	+/-192	9.30%
\$200,000 or more	1,042	+/-226	9.70%
Median household income (dollars)	\$ 66,266.00	+/-5,074	
Mean household income (dollars)	\$ 96,231.00	+/-5,973	
With earnings	5,602	+/-397	52.00%
Mean earnings (dollars)	\$ 79,034.00	+/-9,518	
With Social Security	6,512	+/-376	60.40%
Mean Social Security income (dollars)	\$ 23,197.00	+/-903	
With retirement income	3,938	+/-329	36.50%
Mean retirement income (dollars)	\$ 41,367.00	+/-4,548	
With Supplemental Security Income	227	+/-91	2.10%
Mean Supplemental Security Income (dollars)	\$ 12,774.00	+/-2,866	
With cash public assistance income	85	+/-60	0.80%
Mean cash public assistance income (dollars)	\$ 9,551.00	+/-4,514	
With Food Stamp/SNAP benefits in the past 12 months	210	+/-103	1.90%

Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates.

A majority of households (60.4%) receive Social Security income, which is in keeping with the current population figures and population projections. There are some households with householders aged 65 and over who have incomes below the Federal Poverty Line [Map 8]. There is little to no use of

other government benefit programs however such as cash public assistance, Supplemental Security Income, and/or Food Stamps/SNAP benefits. Seniors are less likely to apply and utilize government programs such as Food Stamps/SNAP though they are eligible to do so (“USDA wants low income seniors”, 2015). This may be given consideration in terms of an educational/resource as the senior population is projected to significantly increase.

Figures in these income categories may change based on the projections showing a significant increase in the population of seniors aged 70 and over. It is likely that the figures may increase in the categories of ‘Social Security’ and ‘Retirement Income’ in line with the projected increase in the senior population.

Estimates show there are more than 23, 000 total housing units in Estero. This estimate is likely underrepresented, even considering margin of error, due to the recent expansion of housing. Eslick (2015) cited the following housing-related projects in an editorial on the growth in Estero:

- **Tidewater:** 387 senior housing unit development just north of Germain Arena;
- **Springs at Estero:** 260 rental housing units on 8 acres on land just east of Germain Arena;
- **Courtyards of Estero:** 104 rental housing units on 9 acres on the north side of Corkscrew Road just west of I-75;
- **Estero Place:** 102 single-family housing units on 48 acres on the southwest corner of Three Oaks Parkway and Corkscrew Road;
- **American House:** 194 senior living units on 9 acres in the south end of Coconut Point; and
- **Autumn Leaves:** 54 bed, 36,000 square foot assisted living facility on 4 acres on the west side of US 41 across from the Coconut Point regional shopping center.

Based on the ACS 2013 estimates [Table 11], a slight majority (54.9%) of housing units are ‘Occupied housing units’ with the remainder (45.1%) being ‘Vacant housing units’. with the majority of

these designated for ‘seasonal, recreational, or occasional use’ (60%). A large majority (85.6%) of occupied housing units are ‘owner-occupied’ with the remainder (14.4%) being ‘renter-occupied’. The homeowner vacancy rate, the proportion of the homeowner inventory that is vacant "for sale", is 3.6 while the rental vacancy rate, the proportion of the rental inventory that is vacant "for rent", is 7.4 for Estero.

Table 11 - Housing Occupancy and Vacancy³: Estero CDP

	Count	Margin of Error	Percent
Total housing units	19,634	+/-421	
Occupied housing units	10,780	+/-537	54.9%
Owner occupied	9,233	+/-502	85.6%
Renter occupied	1,547	+/-268	14.4%
Vacant housing units	8,854	+/-605	45.1%
Homeowner vacancy rate	3.6	+/-1.6	
Rental vacancy rate	7.4	+/-6.1	

Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates.

Data projections constructed by Woods & Poole Economics for the Lee County land-use scenarios report [Table 12] provide that there will be an increase in both the number of single-family and multi-family dwelling units by year 2040. The percent change in single-family dwelling units is projected at 50.4% while the percent change in multi-family dwelling units is projected at 76.3% during this period. This projections is likely to be significantly lower for Estero due to the limited availability of land remaining for residential development.

Table 12 - Dwelling Unit Projection (Year 2040)

	Count 2010	Count 2040	Percent Change
Single-family Dwelling Units	10,749	16,172	50.4%
Multi-family dwelling Units	6,664	11,748	76.3%

Source: Spikowski Planning

³ The homeowner vacancy rate is computed by dividing the total number of vacant units "for sale only" by the sum of owner-occupied units, vacant units that are "for sale only," and vacant units that have been sold but not yet occupied; and then multiplying by 100. The rental vacancy rate is computed by dividing the total number of vacant units "for rent" by the sum of the renter-occupied units, vacant units that are "for rent," and vacant units that have been rented but not yet occupied; and then multiplying by 100.

A practically even split is seen in the estimates as to whether or not owner-occupied units are mortgaged [Table 13].

Table 13 - Mortgage Status: Estero CDP

	Estimate	Margin of Error	Percent
Owner-occupied units	9,233	+/-502	
Housing units with a mortgage	4,557	+/-341	49.40%
Housing units without a mortgage	4,676	+/-428	50.60%

Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates

Estimates place the median gross rent for housing units in Estero at \$1,302.00 [Table 14]. This estimate is higher than the median gross rent for either Lee County or the State of Florida. Even with a margin of error of +/- \$120, the median gross rent in Estero is approximately \$200 higher by comparison.

Table 14 - Median Gross Rent: Estero CDP

	Estimate	Margin of Error
Estero	\$1,320.00	+/-120
Lee County	\$943.00	+/-11
State of Florida	\$990.00	+/-3

Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates

Estimates provide monthly housing costs both in terms of median as well as range estimates [Table 15]. The median monthly housing cost for all occupied housing units is \$1,202.00 though it is higher for renter-occupied housing units (\$1,302.00) than for owner-occupied housing units (\$1,166.00). A higher percentage of housing unit costs are \$1,000 or more (55.8%) versus the lower tiers between 'Less than \$100' and '\$900 to \$999' (44.2%).

Table 15 - Monthly Housing Costs: Estero CDP

	Occupied housing units		Owner-occupied housing units		Renter-occupied housing units	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
Less than \$100	0.40%	+/-0.3	0.40%	+/-0.4	0.00%	+/-2.7
\$100 to \$199	2.70%	+/-1.0	3.20%	+/-1.1	0.00%	+/-2.7
\$200 to \$299	3.10%	+/-1.0	3.40%	+/-1.2	0.70%	+/-1.1
\$300 to \$399	3.50%	+/-1.2	4.10%	+/-1.5	0.00%	+/-2.7
\$400 to \$499	3.90%	+/-1.1	4.40%	+/-1.2	0.70%	+/-1.1
\$500 to \$599	5.20%	+/-1.6	4.90%	+/-1.4	6.90%	+/-5.4
\$600 to \$699	7.40%	+/-2.0	7.90%	+/-2.3	4.10%	+/-2.7
\$700 to \$799	5.70%	+/-1.5	6.20%	+/-1.7	3.00%	+/-2.1
\$800 to \$899	4.40%	+/-1.2	5.10%	+/-1.4	0.40%	+/-1.0
\$900 to \$999	5.40%	+/-1.7	4.60%	+/-1.6	9.70%	+/-6.6
\$1,000 to \$1,499	20.20%	+/-2.7	17.30%	+/-2.7	37.60%	+/-8.8
\$1,500 to \$1,999	13.10%	+/-2.3	11.90%	+/-2.3	20.60%	+/-8.5
\$2,000 or more	24.00%	+/-2.7	26.60%	+/-2.8	8.50%	+/-6.4
No cash rent	1.10%	+/-0.8			7.70%	+/-5.3
Median (dollars)	\$ 1,202.00	+/-83	\$1,166.00	+/-93	\$1,302.00	+/-120

Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates

Housing cost burden reflects the percent of income paid for housing each month as a percentage of household income. Housing is generally considered to be affordable when the cost burden is at 30% or less of household income. According to the Housing and Transportation Affordability Index (2015), housing and transportation costs for Estero equate to 73% of household income with housing accounting for 48% of costs while transportation accounts for the remaining 25% of costs. Average monthly housing costs are reported to be \$1,897.00 while the median selected monthly owner costs, which represent the median monthly costs for owners with a mortgage, to be \$2,001.00. It should be noted that while the Housing and Transportation Affordability Index uses figures from the American Community Survey, their geographic representation for Estero does not match the official village boundary resulting in some variation from data presented elsewhere in this report.

The table below lists the cost burden in Estero as a percentage of household income at certain ranges [Table 16]. As illustrated in the table, the lower the household income the more likely that the

cost burden is 30% or more. Only when incomes reach the ‘\$75,000 or more range’ do we see this trend reverse outside of a few minor exceptions at the lower income ranges.

Table 16 - Housing costs as percent of household income: Estero CDP

	Occupied housing units		Owner-occupied housing units		Renter-occupied housing units	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
Less than \$20,000	9.60%	+/-2.1	9.60%	+/-2.3	9.50%	+/-5.9
Less than 20 percent	0.60%	+/-0.5	0.60%	+/-0.5	0.70%	+/-1.1
20 to 29 percent	1.20%	+/-0.9	1.40%	+/-1.0	0.00%	+/-2.7
30 percent or more	7.70%	+/-1.7	7.50%	+/-1.9	8.80%	+/-5.7
\$20,000 to \$34,999	12.80%	+/-2.5	10.60%	+/-2.2	25.70%	+/-10.7
Less than 20 percent	2.30%	+/-1.1	2.50%	+/-1.2	0.70%	+/-1.1
20 to 29 percent	2.40%	+/-0.9	2.20%	+/-0.9	3.60%	+/-4.4
30 percent or more	8.20%	+/-2.2	6.00%	+/-1.8	21.40%	+/-10.3
\$35,000 to \$49,999	12.90%	+/-2.0	13.00%	+/-2.1	12.20%	+/-6.0
Less than 20 percent	4.70%	+/-1.1	5.40%	+/-1.3	0.00%	+/-2.7
20 to 29 percent	2.30%	+/-1.0	2.30%	+/-1.1	2.30%	+/-1.9
30 percent or more	5.90%	+/-1.7	5.20%	+/-1.6	9.80%	+/-5.9
\$50,000 to \$74,999	18.10%	+/-2.2	18.50%	+/-2.5	16.00%	+/-6.5
Less than 20 percent	6.60%	+/-1.5	7.40%	+/-1.7	1.60%	+/-2.4
20 to 29 percent	5.40%	+/-1.5	5.30%	+/-1.6	5.80%	+/-4.7
30 percent or more	6.20%	+/-1.6	5.80%	+/-1.6	8.60%	+/-4.5
\$75,000 or more	44.50%	+/-3.0	47.50%	+/-3.4	26.70%	+/-9.0
Less than 20 percent	31.00%	+/-2.7	32.50%	+/-3.2	22.30%	+/-8.6
20 to 29 percent	8.10%	+/-1.6	9.00%	+/-1.8	3.20%	+/-2.7
30 percent or more	5.30%	+/-1.7	6.00%	+/-2.0	1.20%	+/-1.6
Zero or negative income	1.00%	+/-0.8	0.80%	+/-0.8	2.30%	+/-2.8
No cash rent	1.10%	+/-0.8			7.70%	+/-5.3

Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates

The growth in Estero relating to housing has been previously noted in the ‘Housing Profile’ section of this report. Estero has and continues to experience a tremendous amount of growth in the commercial arena as well.

As noted by Eslick (2015), recent examples of this commercial growth include but are not limited to:

- **Hertz World Headquarters:** a 250,000 square foot global headquarters, a parking deck, and an auto sales and leasing center on 34 acres at the north end of Coconut Point;
- **Walmart Supercenter:** a 180,000 square foot shopping center on 33 acres located on the northeast corner of US 41 and Estero Parkway;
- **Coconut Point Honda:** Lee County's third Honda dealership on a 6 acre parcel located on the west side of US 41 across from Hertz's Global Headquarters;
- **RaceTrac Service Station:** facility on 2 acres just south of the Coconut Point Honda dealership;
- **Culver's Restaurant:** restaurant was completed late last year on 2 acres on the north side of Corkscrew Road just west of I-75;
- **Discovery Day Academy:** an early childhood education center under construction on 2 acres just south of the Elks Club on the western leg of Coconut Road; and
- **Smaller restaurants and offices:** First Watch and Pollo Tropical restaurants, Mattress Firm, Aspen Dental and space for another tenant recently completed on about 3 acres in the Coconut Trace development across US 41 from the Coconut Point Shopping Center.

This recent growth is unlikely captured in estimates or projections. For example, the approximately 750 workers that will be added from the Hertz relocation and the 350 workers for the newly created Walmart store likely extend projections for employees in the area. This is likely to expand further with the eventual development of Estero Crossings, a 43-acre mixed-use development to include four or five commercial buildings.

Of the total number of individuals, aged 16 and over, 39.2% are in the labor force with the majority being in the civilian labor force rather than the armed forces [Table 17]. The majority of individuals aged 16 and over (60.8%) are not in the labor force. This is in keeping with the population estimates for Estero that show a high number of individuals who are likely retired from the labor force.

Table 17 - Employment Status: Estero CDP

	Estimate	Margin of Error	Percent
Population 16 years and over	20,814	+/-1,075	100%
In labor force	8,153	+/-752	39.20%
Civilian labor force	8,153	+/-752	39.20%
Employed	7,389	+/-711	35.50%
Unemployed	764	+/-209	3.70%
Armed Forces	0	+/-25	0.00%
Not in labor force	12,661	+/-849	60.80%

Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates

The civilian labor force in Estero is diverse in terms of the work they perform [Table 18]. The three top industry categories are:

- Professional, scientific, and management, and administrative and waste management services (17.1%);
- Educational services, and health care and social assistance (16.4%); and
- Retail trade (15.0%).

Table 18 - Industry: Estero CDP

	Estimate	Margin of Error	Percent
Civilian employed population 16 years and over	7,389	+/-711	100%
Agriculture, forestry, fishing and hunting, and mining	4	+/-15	0.10%
Construction	542	+/-187	7.30%
Manufacturing	414	+/-170	5.60%
Wholesale trade	391	+/-149	5.30%
Retail trade	1,111	+/-270	15.00%
Transportation and warehousing, and utilities	121	+/-61	1.60%
Information	130	+/-74	1.80%
Finance and insurance, and real estate and rental and leasing	765	+/-160	10.40%
Professional, scientific, and management, and administrative and waste management services	1,266	+/-418	17.10%
Educational services, and health care and social assistance	1,213	+/-265	16.40%
Arts, entertainment, and recreation, and accommodation and food services	891	+/-418	12.10%
Other services, except public administration	438	+/-158	5.90%
Public administration	103	+/-67	1.40%

Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates

A Lee County land-use scenario project conducted during 2013-2014 by Spikowski Planning and Criterion Planners examined several variables related to employment. One important variable assessed the work location of employees according to traffic zones. Estimates on this variable were provided for year 2010 and year 2040. As all of Lee County was under consideration in the land-use scenario project, Estero was included.

The estimates [Table 19] project a positive percent change (43.1%) in the total number of employees working in Estero. The primary reason for this is a significant increase (98.9%) in the number of service industry employees. It is projected that the number of commercial (retail) employees will decrease during this period. A map displaying the locations of employees based on where they work versus where they live [Map 10] can be found in the appendices.

Table 19 - Estimates of Employees by Type for Estero Year 2010 & Year 2040

	Total	Industrial	Commercial (Retail)	Service Industry	School
Year 2010	12,827	1,019	5,193	6,615	2,349
Year 2040	18,362	1,482	3,721	13,159	3,784
Percent Change	43.2%	45.4%	-28.3%	98.9%	61.1%

Source: Spikowski Planning

Estimates regarding the means of transportation to work [Table 20] show a majority of workers drive to work alone (72%) with a small percentage carpooling to work (10.3%). Public transportation is not estimated to be used at all for work commutes.

Table 20 - Commuting to Work

	Estimate	Margin of Error	Percent
Mean travel time to work (minutes)	21	+/-2.0	
Workers 16 years and over	7,191	+/-695	100%
Car, truck, or van -- drove alone	5,179	+/-573	72.0%
Car, truck, or van -- carpoled	739	+/-414	10.3%
Public transportation (excluding taxicab)	0	+/-25	0.0%
Walked	75	+/-58	1.0%
Other means	369	+/-244	5.1%
Worked at home	829	+/-199	11.5%

Source: U.S. Census Bureau, 2009-2013 American Community Survey 5-Year Estimates

Public transportation is available via LeeTran in Estero though the fixed route service is limited, particularly in the southeast corner of the village. A map showing the existing fixed route LeeTran service in terms of routes and stops [Map 11] can be found in the appendices. This map also displays both quarter-mile and half-mile buffers around the existing LeeTran routes. Research shows the half-mile distance to be the average an individual is willing to walk to reach a transit stop, considering the service is of good quality and the walking grid is reasonably navigable. Research recommends decreasing this estimate to one-quarter mile if considering use by a senior population aged 60 years or over.

Education in Lee County has significant needs at present. A report from the Florida Agency for Workforce Innovation (2010), citing population growth and state-mandated caps on classroom sizes, predicted both Lee and Collier counties would need to hire additional teachers through 2012 with middle school instructors being the highest priority. The school district has been conducting teacher recruitment efforts on an annual basis to fill openings, specifically at the middle school level, while also seeking to build a new high school by the start of the 2018 – 2019 school year (NBC-2, 2015).

Estero currently has both private and public school options available to families though not at all levels. The table below provides the general school programming categories as well as annual average tuition at private schools in Estero [Table 21].

Table 21 - School Programming

Programming	Age/Grade Range	Average Annual Tuition*
Infants	Children aged six months to years	\$11,440.00
Toddlers	Children aged 1 to 4 years	\$10,230.00
Voluntary Pre-Kindergarten	Children aged 4 years	\$10,000.00
Elementary School	Grades kindergarten through 5 th	\$10,306.00
After-School Care	Grades kindergarten through 5 th	\$1,910.00

*Figures are for tuition only and do not include fees for application, meals, or additional programming

The table below lists schools located within Estero according to their type and available programming according to the previously presented categories [Table 22].

Table 22 - Estero Schools

School	Type	Infants/ Toddlers	VPK	Elementary School	Middle School	High School	After- School Care
Discovery Day Academy	Private	X	X	X	X		X
Estero High School	Public					X	
Living Waters Academy	Private						
Milestones Learning Center	Private	X	X				X
Oak Haven Montessori School	Private	X	X	X*			
Pinewoods Elementary	Public			X			

*Oak Haven Montessori School offers a primary program for children up to 6 years of age

Two maps, one showing infant and toddler sites [Map 9] and another showing elementary through high schools [Map 10] as well as the population of children appropriate to the level of school programming can be found in the appendices. Early childhood education and middle school options are the least available in Estero. These may be areas to examine given the arrival of the Hertz Global Headquarters and the expected growth.

A variety of general and specialty health care providers can be found within the boundaries of Estero. However, Estero currently has no acute care hospital facility within its boundaries. There is also no such facility present in Bonita Springs. While there are eight (8) acute care facilities in the area, there are only four (4) within a fifteen (15) mile radius from the mean center of the village with the closest being Gulf Coast Medical Center located in Fort Myers [Table 23]. The Golisano Children's Hospital of Southwest Florida, located in Fort Myers at the HealthPark Medical Center, is the only comprehensive children's hospital in the region.

Table 23 - Hospitals within a 15-mile Radius

Hospital	City	Type	Beds	Distance*
Gulf Coast Medical Center	Fort Myers	Acute Care	233	8.60 miles
HealthPark Medical Center	Fort Myers	Acute Care	291	9.40 miles
NCH North Naples Hospital	Naples	Acute Care	261	10.9 miles
Lee Memorial Hospital	Fort Myers	Acute Care	355	14.55 miles

*Distances are provided on a straight-line estimate

Rehabilitation services would seem to be a priority given the high percentage of seniors in Estero. Outpatient rehabilitation services are available though no inpatient rehabilitation hospital/center is currently available in Estero. The Rehabilitation Hospital is a 60-bed acute care inpatient rehabilitation facility located in Fort Myers within Lee Memorial Hospital. Similarly, the Brookdale Healthy Aging Center is a 32-bed acute care inpatient rehabilitation facility located in Naples near the NCH North Naples Hospital.

The construction of Autumn Leaves, a 54-bed assisted living facility focused on the needs of those living with Alzheimer's or other forms of dementia, is currently underway in Estero. This development would seem prudent given the high median age of residents in Estero and statistics from the Alzheimer's Association (2015) projecting the number of Floridians having Alzheimer's disease to increase by 44% by year 2025; a 14% increase in the projection made in year 2012.

Given its inclusion of both Coconut Point Mall and Miromar Outlets, as well as its proximity to Gulf Coast Town Center, Estero enjoys a wealth of dining and shopping establishments. The majority of these establishments can be found in one of the three complexes mentioned though a large number exist as stand-alone entities in the local area as well.

Coconut Point Mall offers approximately one hundred forty (140) stores in addition to fifteen (15) restaurants that offer service via wait staff and eleven (11) that offer counter service. The complex is also home to a sixteen (16) screen movie theater and a covered children's play area. There are residential properties, in the form of 290 condominium units, found at Coconut Point Mall as well.

Miromar Outlets is similar to Coconut Point Mall given its large number of retail stores (140) and food service options (20) though the latter are more likely to be kiosk and counter service establishments. There is also no residential component at Miromar Outlets. Two covered play areas at the outlets are available for children based on age group. Several koi ponds and fountains are located along the main thoroughfare. A public transit stop is located near the east end of the complex. While not located within Estero, Gulf Coast Town Center is in close proximity. The center offers additional shopping and dining options as well as entertainment venues including a sixteen (16) screen movie theater.

Approximately ten (10) public or private golf courses are found throughout the village. May of the private courses offer other recreational activities such as tennis in addition to golf.

The Estero Community Park & Recreation Center (Lee County) is a 55-acre multipurpose park that includes the following amenities:

- | | |
|--|--|
| <ul style="list-style-type: none">• Recreation Center• Lighted Playground• Two (2) rentable Pavilions• Four (4) lighted Bocci Courts• Three lighted Sand Volleyball Courts• Two (2) lighted multipurpose bermuda fields• Two historic structures | <ul style="list-style-type: none">• Amphitheater; Stage/Lawn Area• Six (6) Picnic Shelters• Off-lead Dog Park with Shelter• 12 lighted Horseshoe Courts• One (1) multipurpose bermuda field• 18 hole Disc Golf Course |
|--|--|

The Koreshan State Historic Site is a state-operated park that provides several recreational opportunities such as camping (60 sites), fishing, watersports (canoeing/kayaking), and hiking. Tours of the historic site are also available. The park is pet-friendly and offers amenities including a boat ramp for access to the Estero River, a playground, picnic tables, and interpretive exhibits.

Access to the Estero River, and Estero Bay by extension, provides residents with opportunities for an array of watersports including canoeing, kayaking, and paddle boarding. Private businesses provide equipment rental and/or tours of the local waterways.

Experiences in culture and the fine arts – specifically theater, art, and music – are primarily limited to offerings at venues located outside Estero. The primary providers of such efforts are:

- Florida Gulf Coast University through the Bower School of Music & the Arts;
- The Center for the Arts of Bonita Springs; and
- The Southwest Florida Performing Arts Center.

Germain Arena and the Barbara B. Mann Center, also both located outside Estero, play host to a number of larger shows such as music concerts, sporting events, and other entertainment acts.

Additional sporting event venues are also located outside of Estero, primarily in the Fort Myers area.

Collegiate sporting events held at Florida Gulf Coast University are the proximate option while the Fort Myers Miracle plays minor league baseball at Hammond Stadium. Hammond Stadium is also home to the Minnesota Twins during spring training season while Jet Blue Park plays host to the Boston Red Sox. Additional opportunities for arts, cultural, sports, and other entertainment experiences should become present with the re-emergence of the sports programs at Florida Southwestern University and the development of Suncoast Credit Union Arena on the campus (Hogan & Logan, 2015).

IV. Phase Two: Key Informant Interviews

Key Informant Interview Methodology

Key informant interviews were conducted to obtain perspectives regarding the initial set of thematic areas identified by the Estero Community Improvement Foundation for this study. A non-random sampling method, purposive sampling, was used to recruit participants. Purposive sampling is used in an attempt to knowingly select candidates based on their ability to provide the information being sought in the study (Patton, 2001; Padgett, 2008). Participants were identified by the Estero Community Improvement Foundation as well as the researcher as having experience in the initial thematic areas outlined for this study. Nine interviews were completed in total. The interviews were conducted at

separate locations that were most convenient for the participant. Efforts were made to ensure maintenance of privacy as well as to limit distractions. The researcher explained the purpose of the study and the interview process prior to beginning any interview. Key informants were given an opportunity to review the study information sheet (Appendix D) and were provided an opportunity to ask any questions. All key informants were notified they would not be compensated for their time spent in the interview. Interviews lasted between forty-five (45) minutes to one hour to complete. Written consent of voluntary involvement in the study and permission to audiotape the interview was obtained from all key informants prior to the start of the interview.

A semi-structured interview guide was used to ascertain the perspectives of key informants concerning their perspectives on the initial set of key thematic areas as well as the quality of life in Estero. The guide provided structure to the interviews without inhibiting the ability of the respondent to give more in depth responses to questions (Appendix A). Open-ended questions were used and phrased in a neutral way without the use of jargon. The questions were ordered in a logical sequence in order to proceed with the conversation and allow for natural responses. Key informants were also asked to provide any additional information they felt could assist the researcher in conducting the study. All interviews were recorded using a digital audio device with a second digital audio device available in the event the first device malfunctioned in any way. None of the key informants objected to the interview being recorded. The researcher took brief written notes regarding facets of the interview that could not be captured on the audio files (e.g. the interview setting, key informant's facial expressions or gestures, etc.). The researcher reviewed the audio file of each interview within twenty-four hours after it was conducted and also compared the interview files to see if key informants were providing any new information.

Key Informant Interview Findings

The key informants provided both general and targeted information about aspects of the quality of life in Estero. The interviews led to the realization that the initial list of key thematic areas introduced by the ECIF did not completely represent the topics of interest to the key informants.

A specific example of this was with regard to education. This topic was not on the initial ECIF list of key thematic areas. However, this topic was mentioned in seven of the nine key informant interviews. The discussions included the quality of Estero schools, access to quality education in Estero, and the school choice policy⁴ imposed by the Lee County School District. Key informants from the business sector noted this topic having an effect on the ability to recruit and retain qualified staff. The rationale behind this idea was the belief among potential workers that Lee County schools are of a lesser quality than those found in Collier County, specifically Naples. Therefore, workers will refuse positions or, if they accept a position, opt to reside in Naples. Other key informants indicated the detrimental effect the school choice policy has on the establishment of a sense of community in Estero.

A few key informants with high school aged children noted their children had long, daily, round-trip commutes despite living close to Estero High School. One key informant noted that students who live in the same area within Estero “largely pass without interacting” during their school departure and arrival times. Key informants from the education field echoed this sentiment adding that residents were both supportive and apathetic towards the schools in Estero.

The initial list of key thematic areas as introduced by the ECIF was revisited based on the information provided in the key informant interviews. A new list of key thematic areas began to emerge as a result.

⁴ The official name of the policy, according to the Lee County School District website, is student assignment. The term school choice will be used in this report as it is how respondents refer to the policy.

Below is a comparison of the two lists side-by-side (both are provided in alphabetical order):

Key Thematic Areas for ECIF	Key Thematic Areas for Key Informants
Arts & Entertainment	Community Identity
Economic Development	Education
Environment	Environment
Health Care	Recreation
Transportation	Transportation

The comparison of the lists is not to say that one is more important than the other. The sole reason for providing the comparison is to show that some topics on the minds of key informants were not present in the original list of ECIF key thematic areas. The updated list of key thematic areas was later used in this study as a starting point for the thematic analysis of responses provided by residents in the focus group sessions and online survey.

V. Phase Three: Focus Groups

Focus Group Methodology

A series of focus group sessions were conducted to provide Estero residents with an opportunity to express their opinions and perspectives regarding the quality of daily living in Estero. A targeted sampling strategy was suggested but not employed in the recruitment of focus group participants. Participants were ultimately recruited for these sessions via various methods. A letter enlisting the support of community leaders such as HOA Boards, was developed and disseminated at an ECCL meeting held in August 2015.

Interested parties were directed to RSVP either via phone or via email for one of the scheduled focus group sessions. Participants were provided with a confirmation of their attendance as well as a reminder email or phone call 24 hours prior to the scheduled session date. A waiting list was developed

due to the interest of individuals seeking to participate. This list was used to replace individuals who were scheduled for a session but who needed to cancel for any reason.

Four focus group sessions were held during the month of September. The sessions were held at the South County Regional Library in Estero. Sessions were held in the early evenings to ensure that working residents might have an opportunity to attend the sessions. Each session was scheduled to last one hour. A SWOC (strengths/weaknesses/opportunities/challenges) analysis approach was employed in each session.

There were a total of 54 participants across the four focus group sessions. Participants were asked to complete a demographic information sheet [Appendix A] and informed consent form [Appendix B] prior to participating in a focus group session. A complete demographic profile of focus group participants can be found in the appendices [Appendix C]. Efforts were made to ensure there were no more than 15 participants per session in order to allow participants with an opportunity to share their opinions and perspectives. The number of participants per session was as follows:

- Session #1: 13 participants (two confirmed but ‘no-show’ participants)
- Session #2: 16 participants (one ‘walk-in’ participant accompanying a confirmed participant)
- Session #3: 15 participants
- Session #4: 10 participants (five confirmed but ‘no-show’ participants)

It is unknown why there was a higher number of ‘no-show’ participants for the final focus group session as there were no general prevailing issues (poor weather, change in venue/date/time, etc.) that might have hindered their participation.

A facilitator trained in the conduct of focus groups managed each session with the aid of research assistant with training in research methods. Participants were asked to provide in their own words what they considered to be the strengths, weaknesses, opportunities, and challenges related to daily quality of

life in Estero. Their responses were recorded on flip charts by the facilitator and/or the research assistant. The flip charts remained visible throughout the session so that participants could revisit previous questions if necessary. After each session the participant responses recorded on the flip charts were transcribed into an electronic file. The focus group responses were aggregated into one file with the open-ended survey responses for thematic analysis.

VI. Phase IV: Online Survey

Survey Methodology

An online survey was designed as the fourth phase of this study given that the focus groups were held during the non-seasonal period. The primary purpose of the online survey was to provide seasonal residents of Estero with an opportunity to provide their input and perspectives.

The survey was designed and disseminated online using SurveyMonkey, a web-based survey software. The survey consisted of twenty-three (23) total questions. The survey was largely designed to mirror the focus group phase of the study. The survey primarily consisted of open-ended, narrative questions rather than questions requiring closed-ended, forced-choice responses. The survey did include a number of these types of questions specifically to capture respondent demographics. This also mirrored the focus group phase wherein participants completed a hard-copy demographic information sheet.

It was not possible to conduct probability sampling given the lack of a comprehensive list of residents that could be used for such purposes. A convenience sampling approach was used in recruiting individuals to complete the survey. Convenience sampling involves the selection of participants who are readily available and convenient to the study (Rubin & Babbie, 2007). The email distribution list used for the survey dissemination was provided by the Estero Council of Community Leaders (ECCL). This was an existing distribution list made up of individuals who had signed up to receive email notices from

the ECCL. The survey was disseminated via a website link emailed to the 3,381 individual email addresses on the ECCL distribution list. A total of 1,318 responses were received providing a response rate of 39%. However, analysis of the responses showed that many individuals completed only the first question of the survey without completing any subsequent questions of the survey. There were 986 total responses, equating to a 29.1% response rate, wherein a respondent completed multiple survey questions. Of these responses there were 890 complete responses, meaning that respondents provided an answer to every question of the survey.

Survey Respondent Demographics

The demographics of the survey respondents largely reflected those of the focus group participants. The majority of the respondents identified as being: Male, White/Caucasian, Not Hispanic/Latino, married, and holding a Bachelor's degree or higher. The first question of the survey was a screening question designed to ensure that respondents were either year-round or seasonal residents of Estero. The majority of respondents (97.5%) identified as meeting this criteria. Those who did not meet this criteria were not permitted to proceed with the survey; being disqualified and redirected out of the survey upon their response to the first question.

A slightly higher percentage of respondents identified as male (56.85%) versus female (43.15%). The age distribution of respondents tended toward the more senior age ranges with the majority of respondents identifying as being aged 60 or older (79.55%). Unfortunately, 389 of the respondents did not provide a response to this question. The majority of the respondents identified as White/Caucasian (92.88%), a trend identified in the demographic profile of Estero and the demographics of focus group participants. Further, an even larger percentage of respondents (97.92%) identified as 'Not Hispanic/Latino', again a trend identified in the demographic profile of Estero and the demographics of focus group participants. The education level of respondents was high with just over a third (32.58%)

having received a Bachelor's degree and an additional one-third (33.98%) having completed a graduate degree. A large majority of respondents identified as being currently married (82.44%).

A majority (60.95%) of the respondents identified as being year-round residents of Estero versus seasonal residents (39.05%). The average length of residence in Estero according to those that responded (937) was 9.86 years. The longest length of reported residence was 55 years while several respondents indicated having recently taken up residence in 2015. The most common year of respondents establishing residence in Estero was 2005. Respondents were more likely to live in a gated community (82.05%) versus other types of communities. Additionally, almost all respondents (98.20%) own versus rent their residence in Estero.

In addition to the demographic questions and open-ended questions, three closed-ended questions were included to gauge respondent perception regarding quality of life in Estero. These questions asked respondents to rate their satisfaction with living in Estero, their perception of the sense of community in Estero, and their perception of the future promise of Estero. The response results are provided below.

Resident Satisfaction

Overall, respondents (944) were satisfied with their experience living in Estero with 63.1% noting extreme satisfaction and 30.6% noting moderate satisfaction (Figure 2). A small percentage of respondents (2.8%) noted their dissatisfaction living in Estero while 3.5% indicated they were neither satisfied nor dissatisfied with their experience.

Figure 2 - Resident Satisfaction

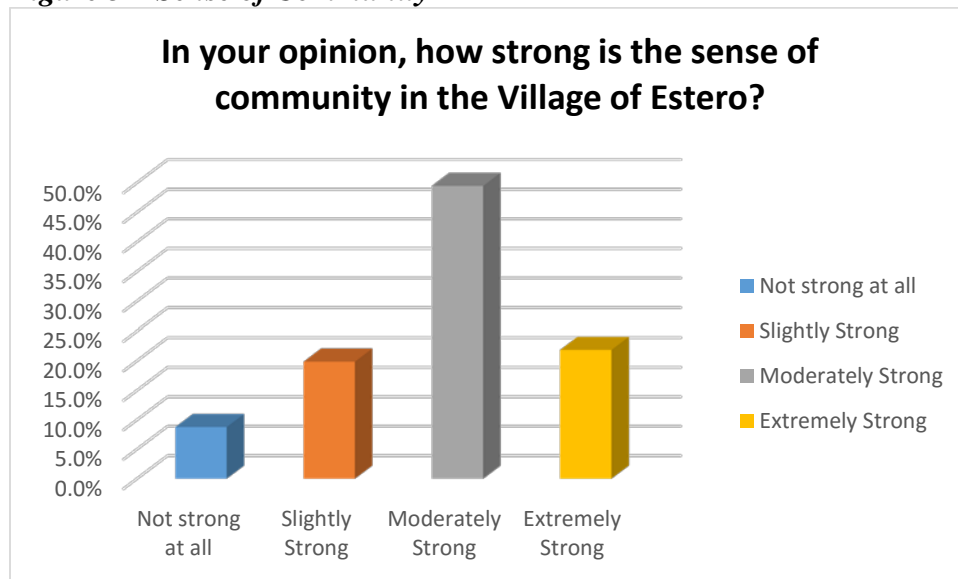


Seasonal residents were just as likely to express satisfaction with their experience living in Estero as were year-round residents. A small percentage difference exists between the two groups with 92.4% of seasonal respondents reporting being ‘extremely satisfied’ or ‘moderately satisfied’ while 94.2% of year-round residents reported the same.

Sense of Community

Respondent views (944) regarding the sense of community in Estero were very positive [Figure 3]. A large majority of respondents (71.4%) viewed the sense of community in Estero as either ‘Extremely Strong’ (21.9%) or ‘Moderately Strong’ (49.5%). The lowered percentages, as compared to the other two closed-ended questions, is consistent with resident responses from both the focus group sessions and online survey comments where ‘sense of community’ was frequently discussed as either a weakness or a challenge.

Figure 3 – Sense of Community



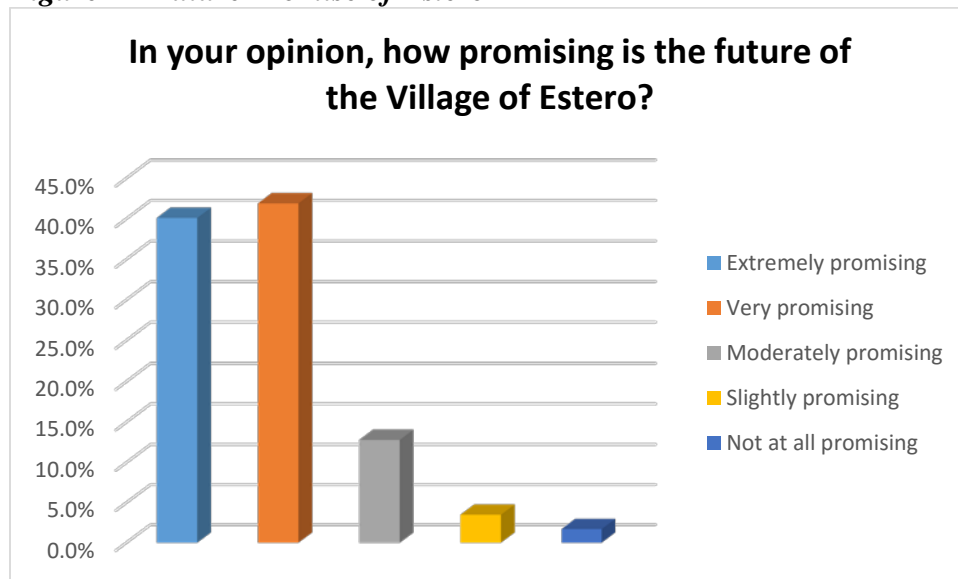
Once again, a small percentage difference was seen between seasonal resident views concerning the future promise of Estero versus their year-round counterparts. On this topic, 62.2% of seasonal respondents viewed the sense of community in Estero as ‘extremely strong’ or ‘moderately strong’ while 71.7% of year-round residents reported the same.

Future Promise of Estero

Respondent views (944) were also positive regarding the future promise of Estero [Figure 4]. A large majority (82%) of all respondents once again indicated their view as being ‘Extremely promising’ or ‘Very promising’.

Once again, a small percentage difference was seen between seasonal resident views concerning the future promise of Estero versus their year-round counterparts. On this topic, 80.4% of seasonal respondents viewed the future promise of Estero as ‘extremely strong’ or ‘moderately strong’ while 83.2% of year-round residents reported the same.

Figure 4 - Future Promise of Estero



VII. Thematic Analysis of Focus Group Responses and Survey Questions

Over 9,000 individual comments were provided through the focus group sessions and the online survey concerning resident views on the current strengths (3,590 comments) and weaknesses (2,263 comments) as well as the current and future opportunities (1,510 comments) and challenges (1,643 comments) with regard to Estero. The comment counts provided here are duplicated counts meaning they reflect individuals providing the same/similar comment. For example, respondents noted the “small town feel” of Estero as a strength on sixty-nine (69) separate occasions while ‘traffic’ was mentioned as a weakness in some form on over 260 separate occasions. Responses also focused on quality of life aspects outside the control of any leadership entity such as ‘summer humidity’ or ‘hurricanes’. These responses were excluded from analysis for this study in order to focus on quality of life aspects that could potentially be addressed by current and/or future leadership in Estero.

The narrative comments were analyzed by the research team using NVivo, a qualitative data analysis (QDA) software package. Comments from the focus groups were transcribed into a Microsoft Word document and merged with the comments gathered electronically via the online survey.

Comments were grouped into their respective categories (strengths, weaknesses, opportunities, and challenges) and loaded into an NVivo project file. The research team first ran word frequency counts to identify commonly occurring keywords in each of the four categories. Using the aforementioned list of key thematic areas, the research team began the process of contextualizing these keywords to see exactly how respondents were considering them. For example, using the key thematic area of 'Education', the keyword 'schools' was examined to see if respondents were providing a view point on 'school quality', 'school choice', 'school access', etc. This process was undertaken in each of the four categories. The research team then began the process of examining for relationships between the four categories. This process compared respondent comments from strengths against those listed as weaknesses, opportunities, and challenges. As an example, comments related to 'leadership' were examined in each of the four categories to see what relationships did or did not exist. Overlaps with some keywords were common, with respondents noting certain topics as possibly being available. These results were used to compile a list of contextual comments highlighting what respondents saw as the major topics/issues related to quality of life in Estero. The final list of comments were analyzed and aggregated into the key thematic areas that had been previously developed based on the initial ECIF list and that which developed from the key informant interviews. A review of these thematic areas follows in the next section.

VIII. Responses by Key Thematic Area

The responses provided in both the focus groups and the online survey have been grouped into a set of thematic areas. This grouping is based on the aggregation of responses from the focus group session and the online survey where topics were noted as being strengths, weaknesses, opportunities, and/or challenges. The content provided in this section are solely those of the residents of Estero. The

Syntony research team has been asked by the ECIF to not provide any strategies or recommendations on the topics presented by residents.

Residents provided several thoughts about weaknesses and challenges as well as how to use strengths and opportunities to address these topics. While the Syntony research team and some of the focus group participants and survey respondents understand that several proposals that would address some of these topics have already been introduced or are in process, it is clear from responses that not all responding residents are fully aware of these plans. These initiatives might include the planned development of the Coconut Point Medical Village by Lee Memorial Health System, advocacy efforts to prioritize known transportation issues in the '2040 Long Range Transportation Plan' of the Lee County Metropolitan Planning Organization, a study of sidewalks and roadways being conducted by faculty at Florida Gulf Coast University (FGCU), and plans to locate a village center west of Estero Community Park. Further, several additional initiatives may already be in process but residents may not have full knowledge of these efforts.

Transportation

Various aspects of transportation in Estero, both vehicular and non-vehicular, were mentioned by respondents. These issues ranged from availability of public transportation to roadway conditions including sidewalks, bike paths, and major roads.

Traffic was the number one identified weakness overall in this study. Respondents noted this issue over 400 times in some fashion between the focus group sessions and online survey. Traffic congestion, particularly during the 'in-season', was noted by respondents on over 100 separate occasions. Respondents provided several recommendations on this topic such as limiting potential development which may only increase road traffic, road widening to accommodate the increasing population, and installation of traffic signals to better manage traffic flows. These topics occasionally

included additional comments concerning the condition of the roads in Estero which some respondents felt were not well maintained. Some of these maintenance issues extended to the lack of landscaping along major roadways. Several respondents indicated a desire to see better roadway landscaping as seen in areas of Naples.

Some respondents felt that the I-75 exit at Corkscrew Road was a strength given that it provides a central point of access to the interstate. However, this interchange was also commonly noted as a weakness and/or challenge. Several other interchanges along Corkscrew Road, such as those at the communities Corkscrew Woodlands and Bella Terra, were also noted as weaknesses. Corkscrew Road was also highlighted in responses for several other reasons including but not limited to a lack of traffic signals, a lack of streetlights, and speed limits being either too high or routinely broken. Respondents felt these issues could result in serious safety issues or incidents of road rage. The widening of Corkscrew Road along with the activation and/or addition of traffic signals were the most often cited suggestions on this topic.

The lack of public transportation throughout Estero was often noted as a weakness. When attempting to explicate the exact issues on this topic during a focus group session, one respondent replied, “Routes. Stops. Schedules. They’re all basically non-existent!” This sentiment was mirrored in several responses on this topic from other focus group participants and survey respondents. Respondents noted that some bus stops were poorly located and provided little relief from the weather while others noted that route schedules made it nearly impossible to commute using public transportation.

Other aspects of transportation often noted related to non-vehicular means of transit. Sidewalks were often reported as being either insufficient or altogether lacking. As one respondent noted, “Need consistent sidewalks or else it's a death trap trying to go from one place to another unless you get into a car which is bad for the environment”. Responses from some individuals also indicated times when

sections of sidewalks would be underwater during heavy rainstorms. This was seen as an issue of safety for residents and also an inhibitor to the development of a sense of community. Respondents felt that not being able to walk safely through some areas of Estero limited the ability of residents to interact in public spaces. Bike paths were generally seen in a similar vein to sidewalks in that they were often insufficient or incomplete. One suggestion was to create an off-street/off-road bike path network on existing undeveloped land.

Respondents saw an opportunity regarding transportation in the possible development of the railway currently owned by CSX Transportation, Inc. into a transit corridor to include hiking/walking/biking paths as well as a possible light rail system. By contrast, many respondents saw the continuation of County Road 951 into Estero as a negative possibility. The primary reasons for this were the possible impacts to the Density Reduction Groundwater Resource (DRGR) and existing residential communities in Estero.

Growth/Development

Growth/Development was seen as the second highest weakness in Estero behind traffic issues. This topic was mentioned by respondents on over 200 occasions in various contexts. Primarily, respondents noted their concern at the fast pace of development. Respondents described the growth and development as being "rapid", "reckless", and "unrestrained" with regard to both commercial and housing development. Respondents questioned development being primarily focused solely on commercial ventures and/or mixed communities versus focusing on the protection of green space or development for recreation purposes. One respondent noted, "[The] only focus is on development and the ignorant push for even more mixed use communities despite every single such community failing in SWFL (see residences at Coconut Point)". With all of the growth/development occurring in Estero some respondents were pleased that steps were being taken to maintain a consistent look in Estero, with an

exception being the exemption permitted to Hertz and some complaints about bringing Walmart into the village.

Respondents also brought up a number of issues that were seen as current or potentially future byproducts of the growth/development. Several respondents mentioned that the current street network was not adequate to keep up with current or future growth/development. Others were concerned that utilities and public services (emergency medical services/police/fire) would not be adequate given continued growth/development. Some respondents also expressed concern regarding environmental impacts. These impacts include the displacement of wildlife, water contamination, and the destruction of trees throughout the village. The promotion of a more conservative approach to growth/development and the retention of remaining acreage as green space was often promoted in respondent comments.

Sense of Community/Identity

Many respondent comments seemed to focus on the sense of community in Estero as well as on its identity as a community. Overwhelmingly, respondents noted Estero as being a desirable location due to several factors. A small sample of these factors include but are not limited to:

- The proximity of Estero to locations such as the airport, Florida Gulf Coast University, the cities of Naples and Fort Myers, and the venues of Coconut Point Mall, Gulf Coast Town Center, and Miromar Outlets;
- The controlled architectural look of the village; and
- The “small town feel” of the village.

Respondents were split however in their perspectives of Estero as having a distinct identity. Some respondents felt that the aspects listed above were what provided the identity of the village. Others however felt that the village lacks a sense of community/identity. One survey respondent stated, “Who

are we? I have no idea”. This response was indicative of others that cited confusion as to how the village came to be named ‘Estero’ and exactly what the name meant from a historical perspective.

Several suggestions were made for improving these areas. The idea of Estero providing a ‘third space’, spaces other than homes and workplaces, was one of the primary suggestions regarding this topic. Respondents generally focused on the development of a core “downtown area” or “village center” to serve as such a space. Respondents envisioned this space resembling the areas of downtown Fort Myers or 5th Avenue in Naples. It is known that plans for such a development have already been presented. Until this plan is implemented, respondents suggested utilizing existing resources, such as Estero Community Park, in a better fashion. The park was seen as having great potential as a community space if events were better targeted towards the whole community rather than primarily for private events. The annual presentation of community-based events such as ArtWalk/MusicFest/Taste of Estero was presented by respondents as some possible options.

The presence of FGCU being so near to Estero was often mentioned by respondents as a strength, weakness, opportunity, and/or challenge. Issues of student-resident discord generally focused on aggressive driving habits of students and/or student rental of housing in certain communities. However, many respondents felt that a more visible partnership between the village and the university would provide greater opportunities for both the university and Estero residents. These opportunities included educational programs, arts and entertainment events, and mutual participation on ventures involving business development and environmental research.

Other suggestions to improve the sense of community/identity included providing signage on major roadways for Estero, ensuring that all residences that fall within village boundaries have Estero zip codes/ mailing addresses, and the development of additional recreational facilities (community pool/ball fields/basketball courts/dog park).

Education

While acknowledging that public schools are operated at the county level, respondents cited several issues related to the academic institutions within Estero. The county-level school choice policy was noted as a major obstacle related to another key thematic area – sense of community/identity. Several respondents feel that school choice limits the ability of school-age youth and their families to develop meaningful relationships. Several respondents noted the long distances needing to be traveled by their school-age children to attend schools some distance from their homes.

Again, respondents understood that the school choice policy is not an issue specific to Estero. A detailed discussion on this matter took place in two of the four focus group sessions. However, respondents did feel that the Estero leadership and residents could engage in grassroots and legislative advocacy efforts aimed at the possible elimination of the school-choice policy. Respondents felt this change could be a step towards promoting a stronger sense of community among children and their families as well as to further strengthen community support for the existing schools located in Estero.

Housing

Respondents were generally pleased with the design aesthetics of homes and communities in Estero. The consistent look of the village, with the noted exception of the newly built Hertz Global Headquarters, was something respondents felt strongly about. Additionally, the value of homes in Estero was regularly reported as a strength. However, this was also sometimes seen as a potential challenge in some cases. Some respondents indicated a lack of affordable housing as being an issue on two fronts. First, residents felt there was little opportunity for downsizing their housing as they grew older. Respondents felt there was a scarcity of smaller, affordable homes in Estero as alternatives to their current homes. Second, some respondents indicated a lack of affordable housing for workers, particularly those in the service industries, within Estero. This topic included a few responses against

‘low income housing’ which respondents felt would bring down overall home values (“LOW INCOME HOUSING...DO NOT DO THIS...keep us affluent”) and potentially increase crime in Estero (“We need to discourage low income housing which will bring crime to Estero”).

An often cited challenge, both via the focus group sessions and the online survey, was the number of gated communities in Estero. Respondents felt the large number of these communities lent to the lack of a sense of community in Estero. The rationale often provided were that residents in gated communities were more interested in staying within their gates rather than venturing out into the larger Estero community other than to shop or dine.

Leadership

Respondents noted the newness of the village leadership post-incorporation. They also praised the efforts of leadership entities in bringing incorporation and growth to Estero. However, several respondents were unsure as to the relationship between Estero leadership entities such as the Village Council, Estero Council of Community Leaders (ECCL), and the Estero Community Improvement Foundation (ECIF). Several respondents indicated their gratitude for the efforts made by each of these entities in the development of Estero. A few respondents though, from both the focus groups and online survey, indicated they were confused as to the role of each entity. One respondent noted this directly in stating, “There is some confusion over the role of the ECCL and the city fathers in government.” Further, several respondents noted that the influence of the ECCL, as a leadership entity pre-dating the Village Council, may be problematic to the future development of Estero. Three respondents indicated this stating, “I am concerned about the ECCL overwhelming the Village Council”, “I think it’s time for the ECCL to take a step back and let [the] Council be the leaders”, and “The ECCL should serve and support the Village Council, not be out front as it currently appears”.

Health Care

Health care was a key thematic area from the initial list developed by the ECIF. Many respondents indicated the proximity to medical facilities and the availability of medical specialists in Estero as a strength. Respondents felt that the availability of medical specialists eliminated the need to see their doctors “back home”. Several respondents made reference to the lack of a hospital as being a weakness. A greater number of respondents noted the plans by Lee Memorial Health Systems to develop the Coconut Point Medical Village in Estero as an opportunity.

IX. Study Limitations

A few limitations arose in the conduct of this study, primarily with regard to the ability to conduct targeted participant sampling in the focus group phase as well as comprehensive dissemination of the online survey. Two primary limitations were noted in the conduct of the focus group sessions. First, a targeted sampling strategy was not employed in the selection of focus group participants. This limitation manifest itself in various ways such as both members of married couples participating in the focus group sessions which limited the number of available spaces for participants from different households; the majority of participants lived in gated communities located east of Interstate I-75 in Estero; a limited number of participants from non-gated communities participated, particularly individuals residing in mobile home/RV developments; and no individuals under the age of 30 participated in the focus group sessions.

Second, the time of year when the focus group sessions were conducted was also noted as a limitation. The fact that the sessions were held during the month of September, prior to the traditional in-season, curtailed the opportunity for seasonal Estero residents to participate in the focus group sessions. Acknowledging this limitation, an online survey was designed and disseminated in order to

provide seasonal Estero residents with an opportunity to provide their input and perceptions regarding the quality of daily life in Estero.

A similar limitation existed with the dissemination of the online survey. The distribution list for the online survey was a pre-existing list held by the Estero Council of Community Leaders (ECCL). This list has primarily been generated through participant opt-in and therefore may not have included a representative sample of the resident population of Estero.

X. Future Research

As a developing community, the Village of Estero provides a rich opportunity for continued evaluation efforts such as the one undertaken in this study. Future research efforts could be more tailored to specific aspects of the quality of life of residents in Estero using the key thematic areas identified in this study. Research in the areas of business development and environmental sustainability, topics not specifically examined in this study, should be considered given resident concerns in these areas. Future research efforts could build on the information provided by residents in this study through the targeted recruitment of select groups such as families, younger individuals, and residents of communities that were under-represented in this study.

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Appendix A: Participant Demographics Form

Estero Needs & Assets Study – Community Focus Group

Instructions: Please **do not** write your name on this sheet. Please provide a response for each of the following questions.

1) What is your current age? _____

2) What is your gender?

____Female

____Male

3) What is your current marital status?

____Never married

____Divorced

____Married

____Widowed

____Separated

____Member of an unmarried couple

4) What is your current household annual income?

____Less than \$25,000

____\$75,000 to \$99,000

____\$150,000 to \$174,999

____\$25,00 to \$49,000

____\$100,000 to \$124,999

____\$175,000 to \$200,000

____\$50,000 to \$74,000

____\$125,000 to \$149,999

____More than \$200,000

5) With which of the following racial groups do you identify?

____American Indian/Alaska Native

____Hawaiian/Pacific Islander

____Asian/Asian American

____White

____Black/African American

Other: _____

6) Please specify your ethnicity:

☐ Hispanic or Latino ☐ Not Hispanic or Latino

7) How many individuals currently reside in your household? _____

8) How many individuals currently reside in your household who are (please provide a number for each age range):

☐ Under 5 years old ☐ 18 – 24 years old ☐ 46 – 55 years old ☐ Over 75 years old

☐ 5 – 12 years old ☐ 25 – 35 years old ☐ 56 – 65 years old

☐ 13 – 17 years old ☐ 36 – 45 years old ☐ 66 – 75 years old

9) Are you a full-year resident of Estero?

☐ Yes ☐ No

10) What year did you begin to reside, either year-round or seasonally, in Estero? _____

11) Do you rent or own your residence in Estero?

☐ Rent ☐ Own

12) Based on the categories provided below, how would you categorize the community of your residence?

☐ Single family home in a gated community ☐ Condominium in a gated community

☐ Single family home in a non-gated community ☐ Condominium in a non-gated community

☐ Apartment complex ☐ Mobile/RV/Manufactured home Park

13) Please identify the name of the community in which you reside in Estero: _____

14) How did you hear about the study/focus groups? _____

Appendix B: Informed Consent Form

Village of Estero Community Needs & Assets Study

I. Investigator: Thomas P. Felke, MSW, Ph.D. – Syntony Research & Consulting, LLC.

II. Participant Characteristics

Participants must meet the following criteria in order to participate in a focus group session:

- Be at least 18 years of age;
- Be either a full-time or seasonal resident of Estero; and
- Not be an officer, director, or affiliated member of the Estero Community Improvement Foundation.

III. Explanation of Procedures

Before agreeing to participate in this focus group session, it is important that you read the following explanation of this study. This statement describes the purpose, procedures, benefits, risks, discomforts, and precautions of the program. Also described are the alternative procedures available to you, as well as your right to withdraw from the study at any time. No guarantees or assurances can be made as to the results of the study.

This research is designed to identify participant experiences as a resident of Estero as concerning their daily quality of life. Participation in the study involves completion of a brief demographic information form followed by a focus group discussion which will last about one (1) hour. You will participate in a discussion with 11-14 other residents of Estero. A facilitator will ask questions about your experiences as a resident of Estero. You can ask for clarification at any time. You can ask questions of your own at any time. Notes will be taken during the session. The discussion will also be audio-taped and the investigator will transcribe this into a written transcript at a later date for the purpose of analysis.

IV. Costs and/or Payments for Participation in Research

There will be no costs for participating in the research. Also, participants will not be paid to participate in this research project. However, complimentary refreshments will be available to you during the focus group session.

V. Risks and Discomforts

There are no risks or discomforts that are anticipated from your participation in this focus group session. Potential risks or discomforts include a range of emotional feelings when asked questions during the discussion about your daily living experiences in Estero.

Please be advised that although the investigators will take every precaution to maintain confidentiality of the data, the nature of focus groups prevents the investigators from guaranteeing confidentiality. The investigators would like to remind participants to respect the privacy of your fellow participants and not repeat what is said in the focus group to others. The investigator will begin the focus group by asking the participants to agree to the importance of keeping information discussed in the focus group confidential and will remind them at the end of the session not to discuss the material with anyone outside of the session.

VI. Benefits

The anticipated benefit of participation is the opportunity to discuss feelings, perceptions, thoughts, and concerns related to the experience of being a resident of Estero.

VII. Confidentiality

The information gathered during this study will remain confidential. Only the investigator and staff of Syntony will have access to the study data and information. Participant names and/or identifying information will not be available to anyone outside of Syntony staff. Any recordings and transcripts of the focus group will be destroyed after one year or at the end of the study. The results of the research will be published in the form of a report which may be presented at professional meetings.

VIII. Withdrawal from Study

Participation in this study is voluntary; refusal to participate will involve no penalty. Each participant is free to withdraw consent and discontinue participation in this focus group session at any time without prejudice.

IX. Questions

Any questions regarding rights as a person in this research project and/or questions concerning the focus groups can be directed to Dr. Thomas Felke via phone at (239) 287-7328 or via email at t.felke@syntonyrc.com.

X. Non-Disclosure Statement

By participating in this focus group session, you hereby agree to maintain the confidentiality of the information discussed by all participants and investigators during the focus group session. **NOTE:** *If you cannot agree to the above stipulation please speak with the investigator as you may be ineligible to participate in this study.*

XI. Agreement

Your signature below indicates the following:

- You have received, reviewed, and understand this informed consent;
- You attest that you meet the participant characteristics as outlined in Item I of this informed consent;
- You attest that you understand that the focus group discussion will be audio recorded; and
- You agree to the non-disclosure agreement provided in Item IX of this informed consent; and
- You attest that you voluntarily give your consent to participate in the focus group session,

Participant Name (printed): _____

Signature of Participant: _____

Date: _____

Appendix C: Focus Group Demographics

Participant Count: 54

Age:

- Average age: 59.9
- Age of youngest participant: 32
- Age of oldest participant: 79

Gender:

- Male: 29
- Female: 25

Marital Status:

- Never married 2
- Married 39
- Separated 0
- Divorced 6
- Widowed 5
- Member of an unmarried couple 2

Race:

- White/Caucasian 54

Ethnicity:

- Hispanic/Latino 1
- Not Hispanic/Latino 51
- No Response 2

Household Size:

- Average household size: 2.46
- Single-person households: 9
- Two-person households: 31
- Three-person households: 4
- Four-person households: 4
- Five-person households: 3
- Six-person households: 2
- Seven-person households: 1

Annual Household Income:

- Less than \$25,000 1
- \$25,00 to \$49,000 2
- \$50,000 to \$74,000 12
- \$75,000 to \$99,000 9
- \$100,000 to \$124,999 8
- \$125,000 to \$149,999 8
- \$150,000 to \$174,999 4
- \$175,000 to \$200,000 4
- More than \$200,000 5
- No Response 1

Households with Members in each Age Group:

- Under Age 5: 2
- Age 5 – 12: 8
- Age 13 – 17: 9
- Age 18 – 24: 2
- Age 25 – 35: 6
- Age 36 – 45: 6
- Age 46 – 55: 11
- Age 56 – 65: 9
- Age 66 – 75: 19
- Age over 75: 8

Residency:

- Year-round Resident 51
- Seasonal Resident 1
- No Response 2

Rent vs. Own:

- Own 47
- Rent 6
- No Response 1

Years in Estero:

- Average years of residence: 8.9
- Low: less than 1 year
- High: 15 years

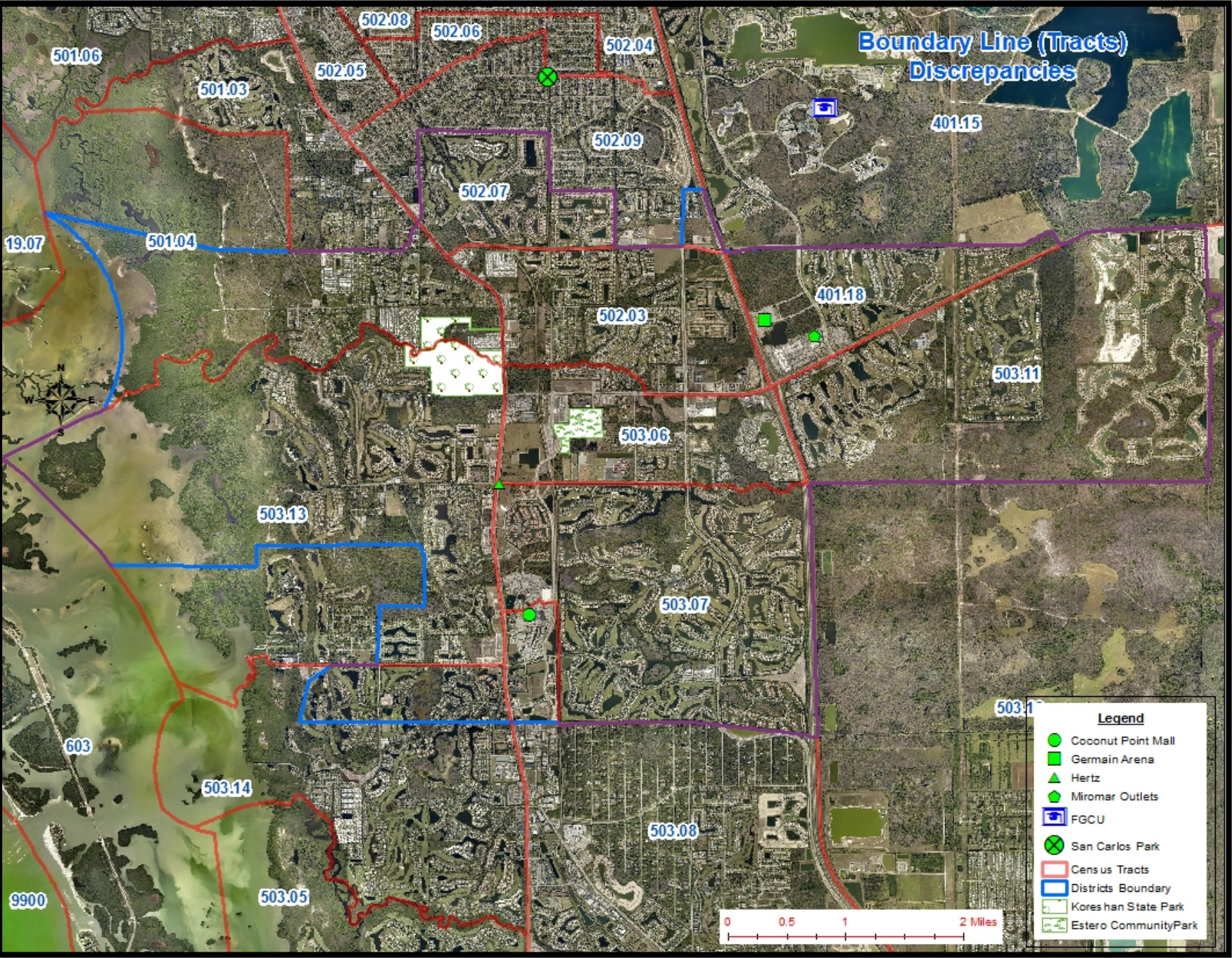
Type of Residence:

- | | |
|---|----|
| • Single family home in a gated community | 33 |
| • Single family home in a non-gated community | 3 |
| • Apartment complex | 1 |
| • Condominium in a gated community | 14 |
| • Condominium in a non-gated community | 0 |
| • Mobile/RV/Manufactured home Park | 2 |
| • No Response | 1 |

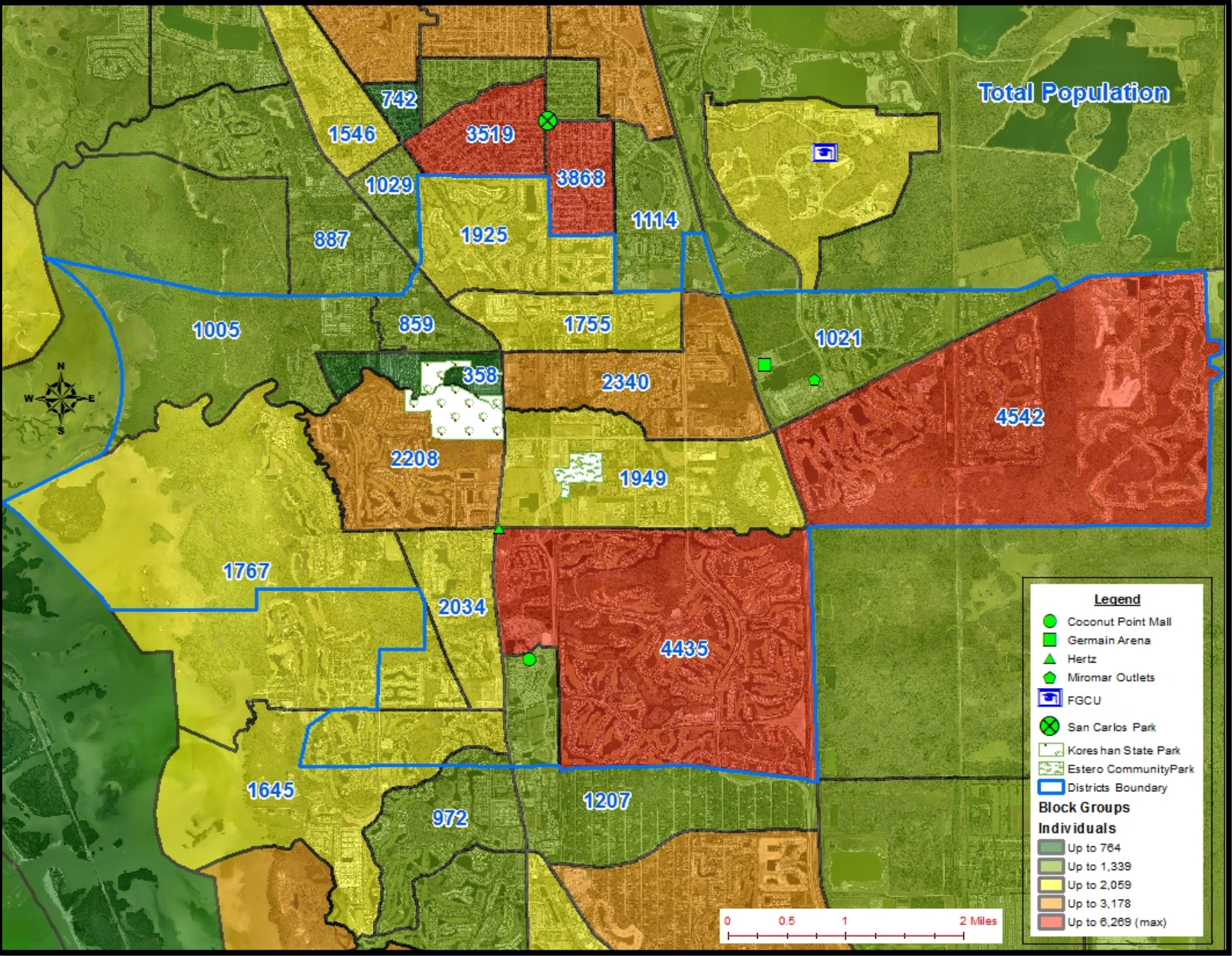
Participant Count by Residence:

- | | |
|-----------------------------|---|
| • Bella Terra | 9 |
| • Brooks | 1 |
| • Colony at Pelican Landing | 2 |
| • Corkscrew Woodlands | 2 |
| • Fountain Lakes | 3 |
| • Grandezza | 3 |
| • Happehatchee Center | 1 |
| • Lakes of Estero | 2 |
| • Lighthouse Bay | 1 |
| • Marsh Landing | 6 |
| • Pelican Landing | 1 |
| • Pelican Sound | 1 |
| • The Preserve at Corkscrew | 1 |
| • Rapallo | 1 |
| • Rookery Pointe | 2 |
| • Shadow Wood | 3 |
| • Stoneybrook | 8 |
| • Terra Vista | 3 |
| • Reserve at Estero | 1 |
| • Wildcat Run | 1 |
| • No Response | 2 |

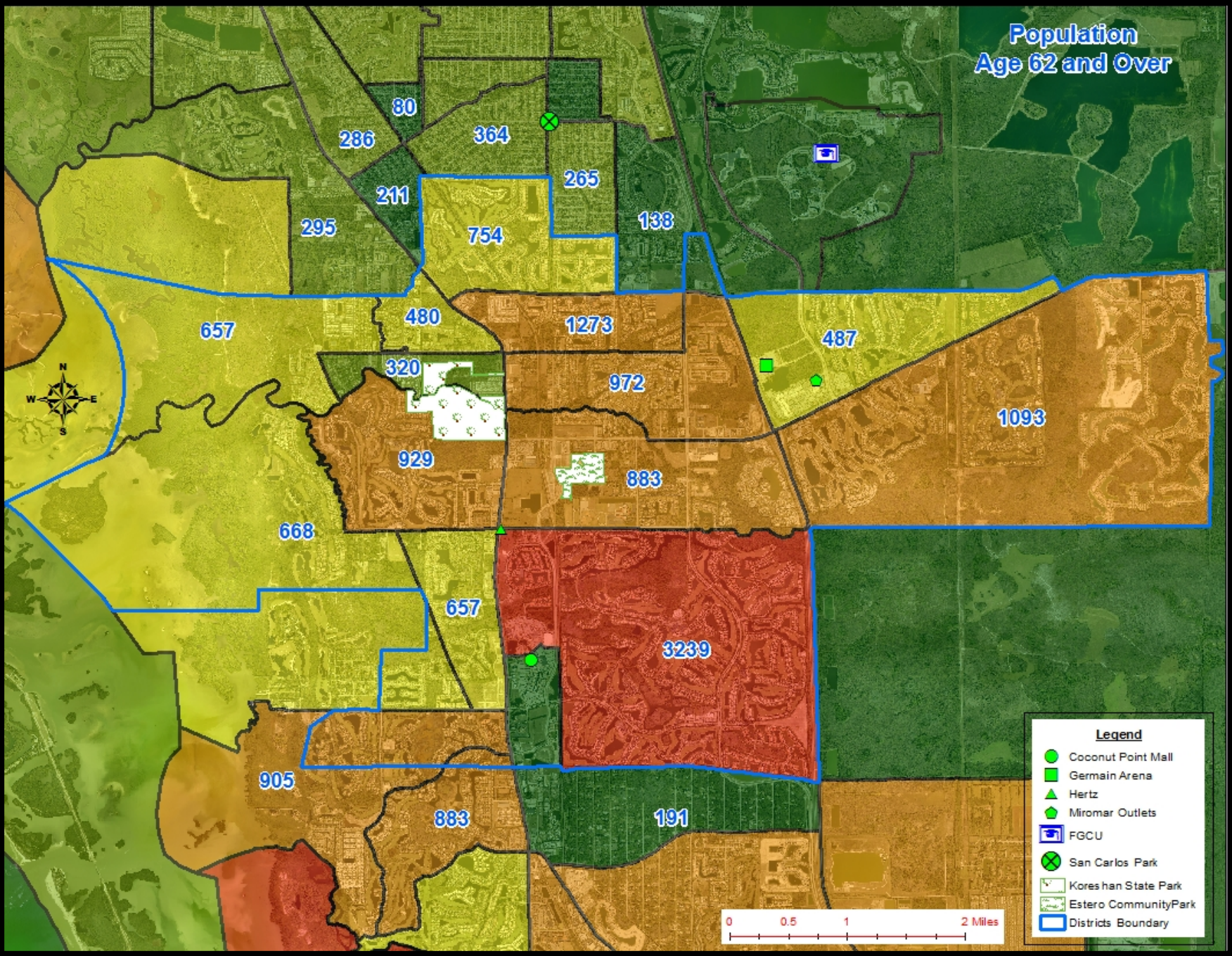
Map 1- Boundary Discrepancies



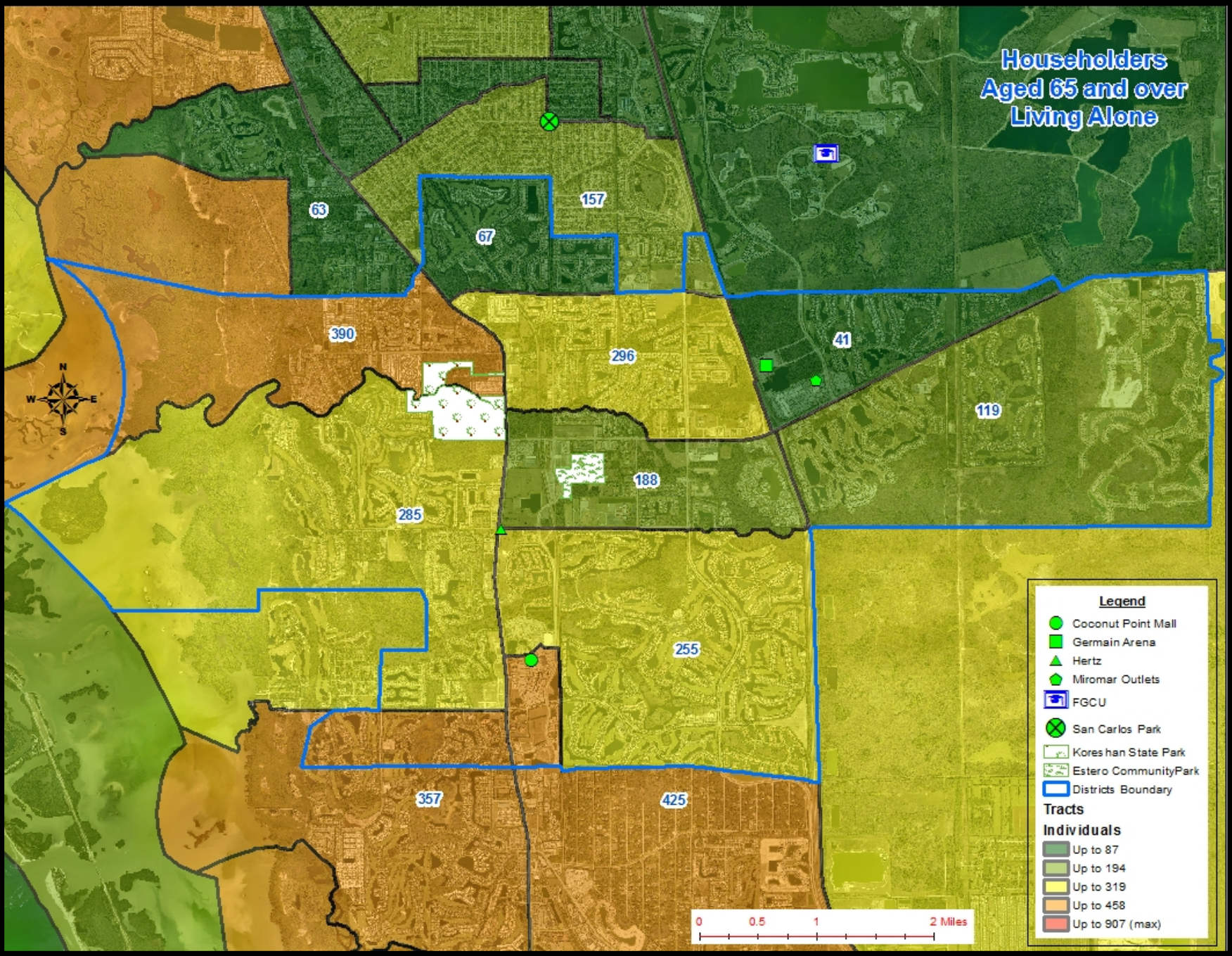
Map 2 - Estimate of Total Population



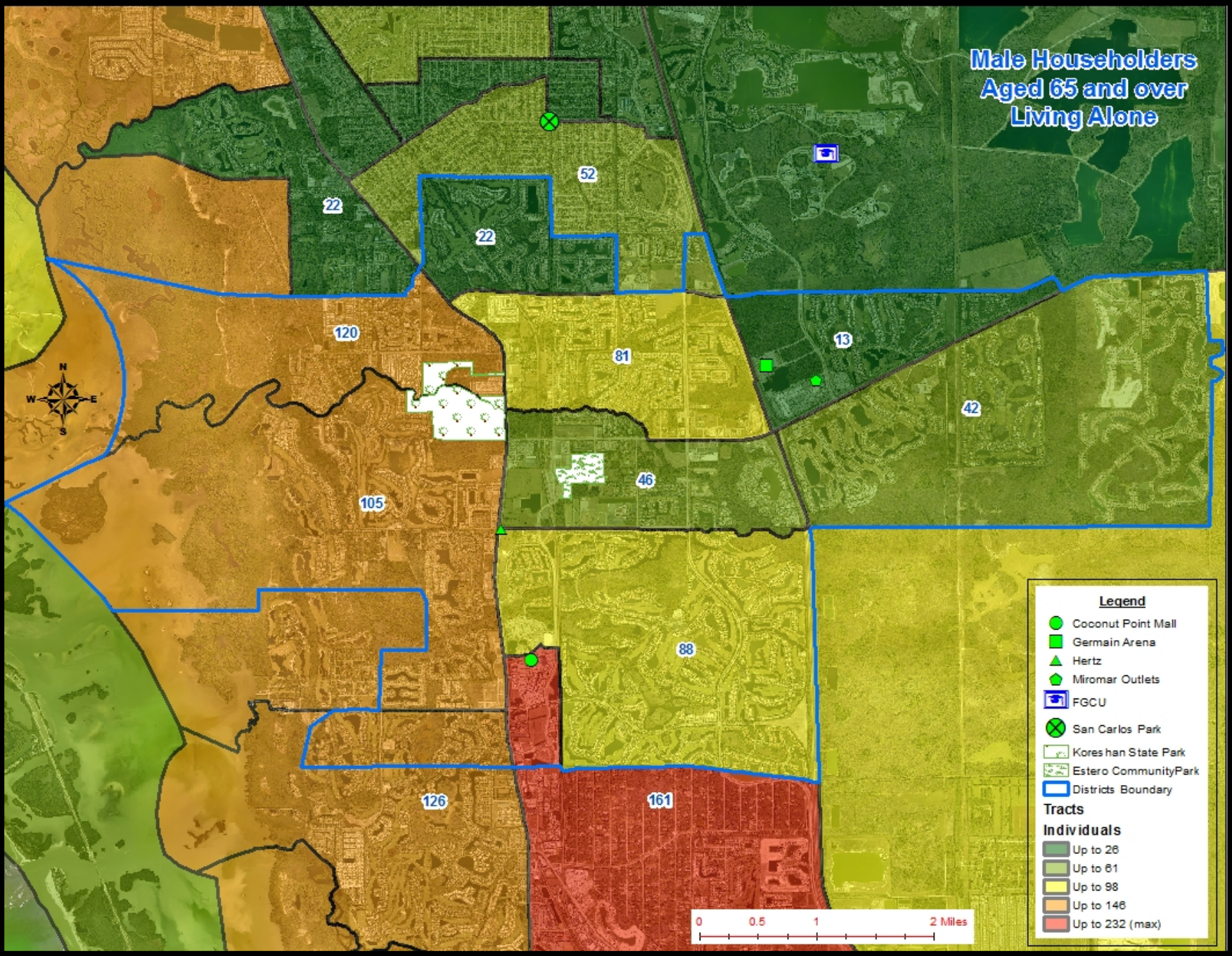
Map 3 - Estimate of Individuals Aged 62 and Over



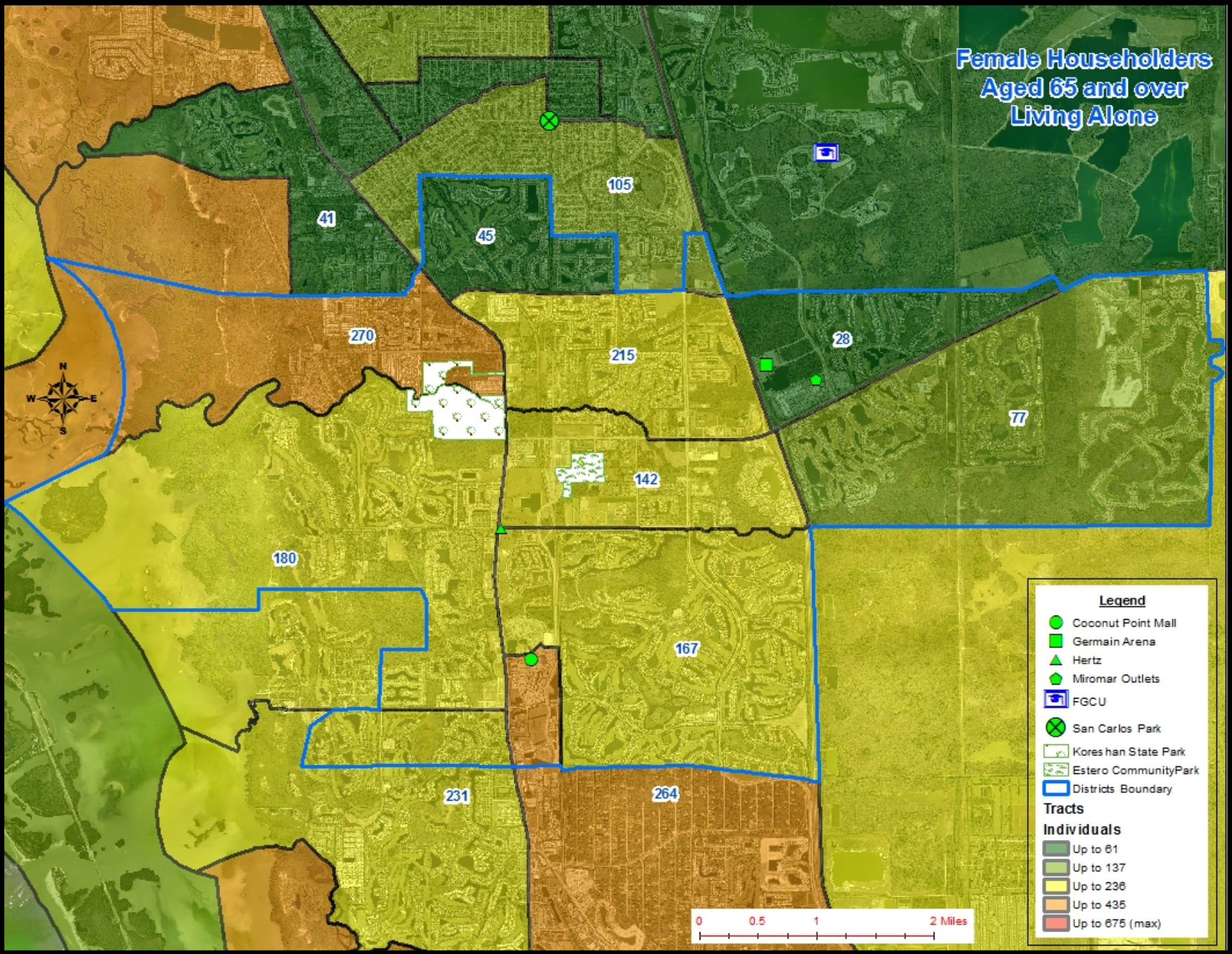
Map 4 - Householders Aged 65 and Over Living Alone



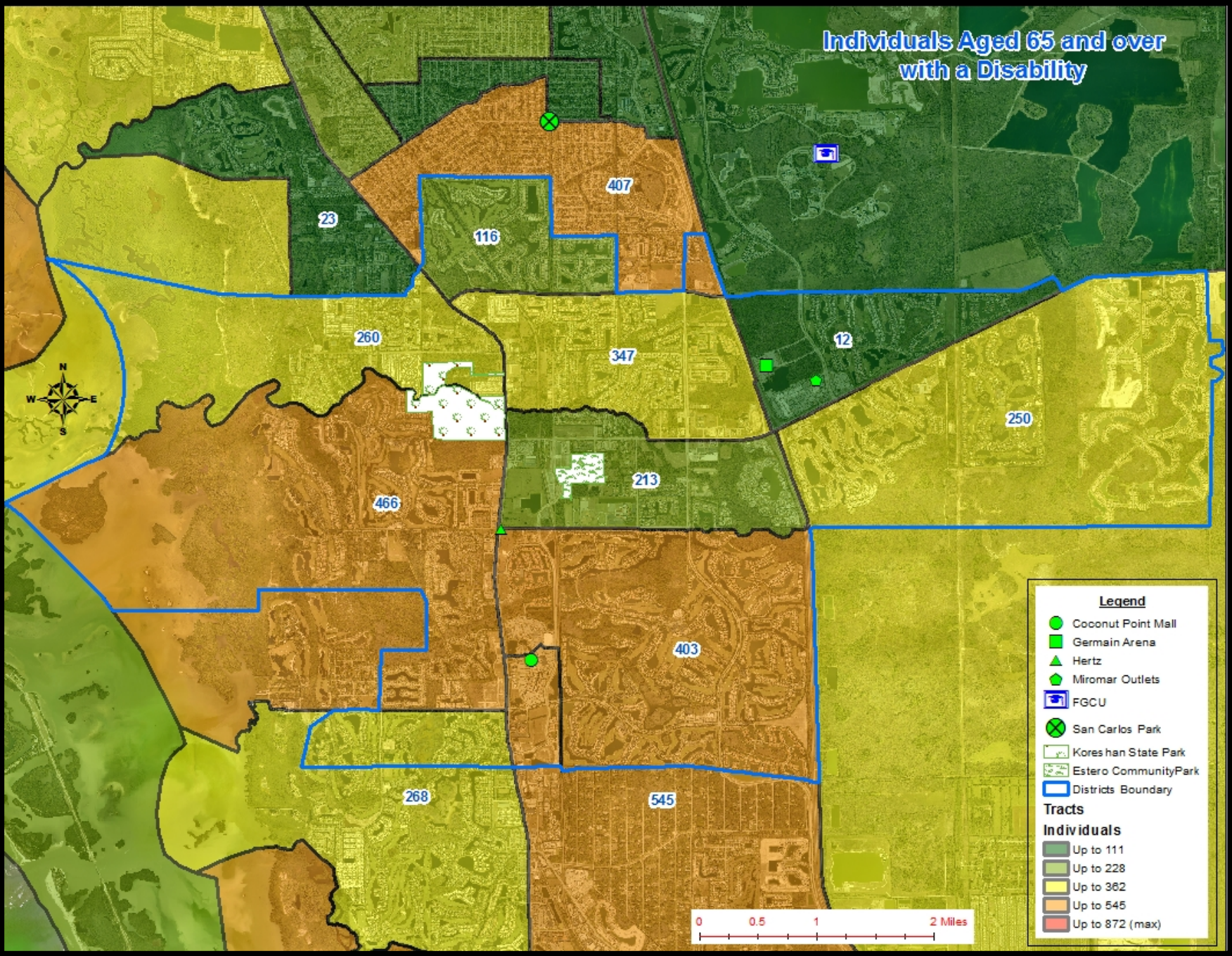
Map 5 - Male Householders Aged 65 and Over Living Alone



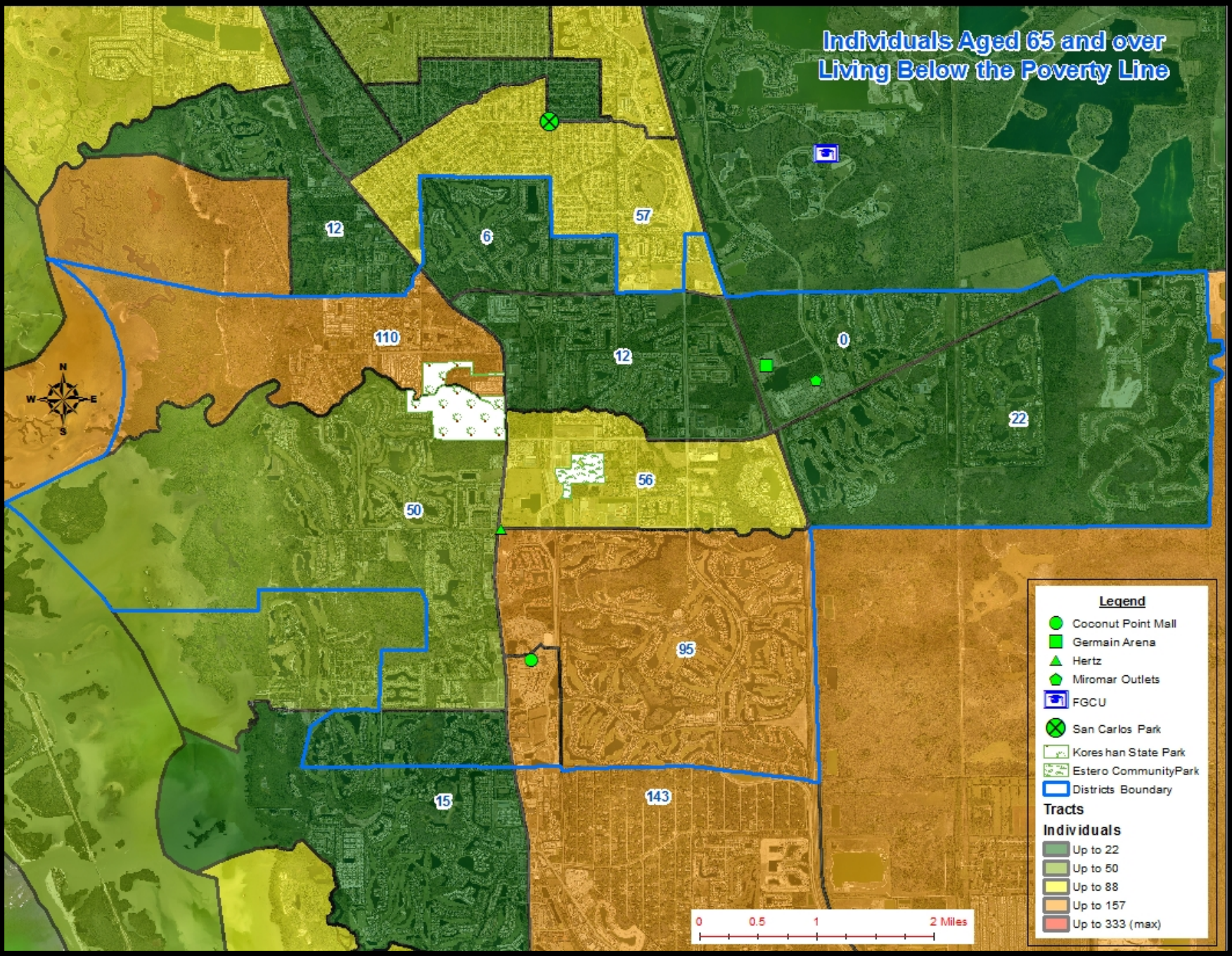
Map 6 - Female Householders Aged 65 and Over Living Alone



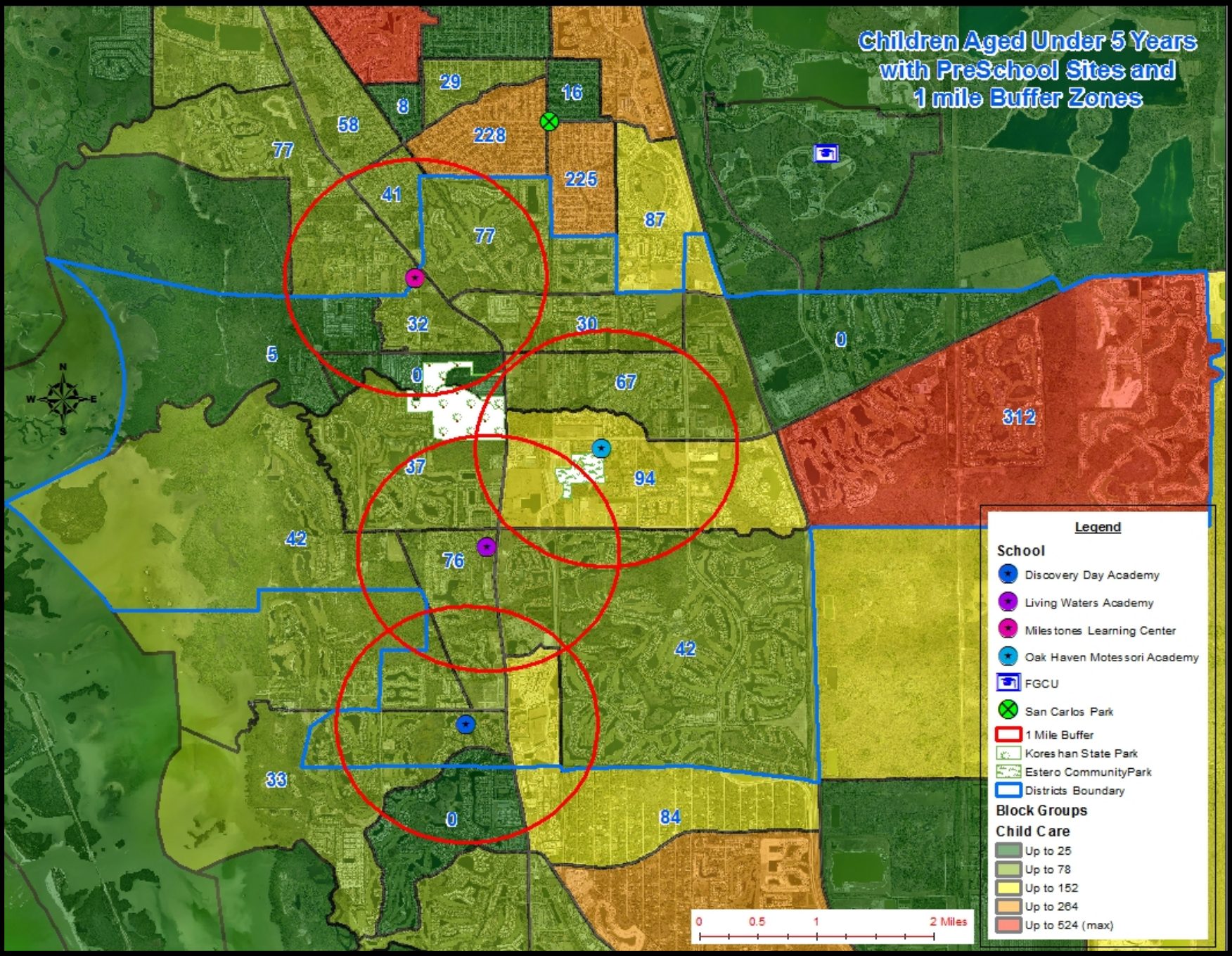
Map 7 - Individuals Aged 65 and Over with a Disability



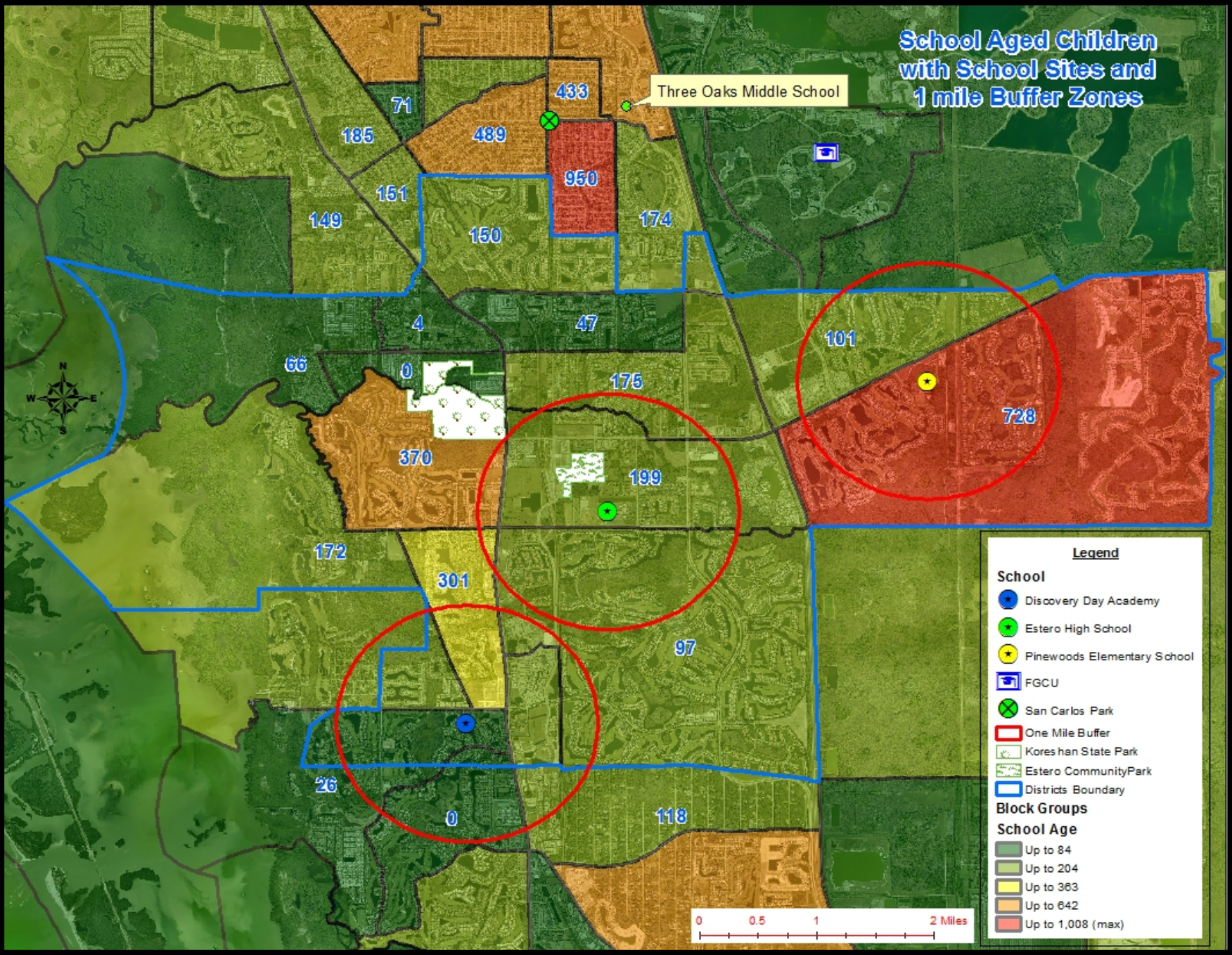
Map 8 - Householders Aged 65 and Over Living below the Poverty Line



Map 9 - Children under Age 5 with Locations of Schools



Map 10 - School Aged Children (Elementary – High School) with Locations of Schools



Map 11 - LeeTran Routes & Stops

