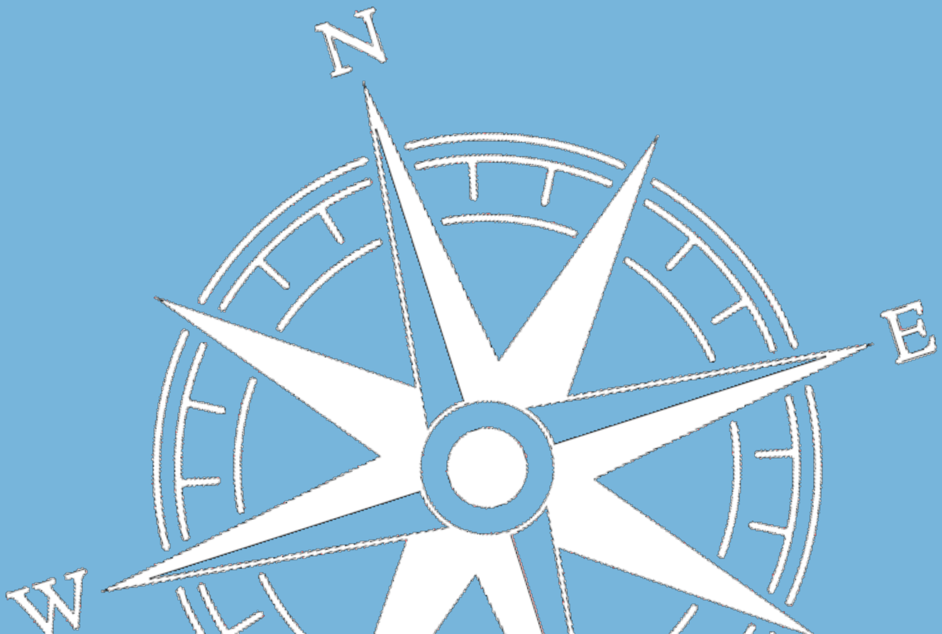

SETTING WAYPOINTS & THE COURSE AHEAD

CAPE CORAL ECONOMIC DEVELOPMENT STRATEGIC PLAN

Executive Summary

DCG Corplan

PARTER International, Inc.

fp Forgey Planning

D-H&Assoc

December 2024

Acknowledgements

The Cape Coral Economic Development Strategic Plan is a comprehensive roadmap for achieving success in a uniquely challenging environment. Creation of the Strategy is not accomplished in a vacuum – there are many people and organizations that have provided valuable input to the process.

Our project team has been guided by the dedicated leadership of the Office of Economic and Business Development, the City Manager's Office, Development Services, Public Works, Communications, Information Technology Services, the Chamber of Commerce, the Lee County Visitor and Convention Bureau, and more.

We would like to thank Mayor Gunter, the City Council, and the especially the residents and businesses of Cape Coral, without whose unbiased and informative opinions and recommendations this work would not be possible.

Project Team

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Photo credit: The Westin Cape Coral Resort at Marina Village

Introduction

The City of Cape Coral is in growth mode. Its unprecedented population expansion is estimated to continue for at least two more decades, bringing the population to about 375,000 people. At that size, Cape Coral will be equivalent to the current population of cities such as Cleveland, OH, New Orleans, LA, or Honolulu, HI.

Cape Coral was developed as suburb of the more established business center of Fort Myers, with the expectation that its numerous canals and pre-platted single-family lots could easily be marketed to the American middle-income worker who was seeking a place in warmer climates to retire. That marketing model was so successful that Cape Coral's leadership has now realized that functioning as a modern city is the only forward direction that the community can take. Recognition is a first step in taking action, but a plan needs to be developed on how to get there.

The intent of this study is to prepare an Economic Development Strategic Plan which contains goals, objectives, implementation plans, and metrics. It is intended to identify the strengths of the City of Cape Coral and determine a means of leveraging those advantages to spur economic growth.

What will Cape Coral look like in twenty-five years? What type of city should it become? These are the questions that this Economic Development Strategic Plan has striven to answer.

The study has been developed in three parts. The first volume, Setting Waypoints, presents the foundational characteristics of the City of Cape Coral from a competitiveness and opportunity viewpoint. The main goal is to understand the complexities of this large community, its advantages and drawbacks, and its potential for sustainable growth into the future.

The second volume, The Course Ahead, outlines the vision for Cape Coral and defines **50** strategic initiatives within **5** major frameworks that focus on finding the way forward.

A third volume contains the Technical Report inclusive of tables, charts and graphics required for the detailed analysis of the City of Cape Coral.

Cape Coral's unique location is also its drawback. This is a city with no seaports, airports, train stations, interstate highway access, or municipal bus system. In many ways, Cape Coral is just a suburban town. But, with a growing population already exceeding metropolises such Salt Lake City, determining what kind of city Cape Coral will become is a vital undertaking.

In many ways, Cape Coral is fortunate in that there are not many missteps that need to be corrected as other communities have need to do. But the absence of major investment in key areas such as transportation, infrastructure, affordable housing, and corporate/commercial real estate is now needed as the City grows. It is the objective of economic development to address these inadequacies by guiding civic leadership into new strategic directions that will achieve successful outcomes.   But it is only through commitment, dedication, and persistence that meaningful change can be accomplished.

Volume 1 – Setting Waypoints

Competitiveness & Opportunity

Cape Coral is the **8th** largest city by population and the **3rd** largest by land mass in Florida. With a population of more than **217,000** residents, the City is experiencing high growth. As a pre-platted community, Cape Coral could have more than **375,000** residents at buildout. Dynamic population growth that is not accompanied by strong economic growth ultimately can result in an imbalance in municipal service demands and excessive costs burden on public budgets. Recognizing where Cape Coral can improve its competitive position can improve the chances of a more sustainable economy that benefits from growing employment and investment. While the Vision is more clearly articulated in Volume 2 – Strategy, the Mission of this part of the study is clearly defined:

Provide the strategic recommendations necessary to ensure that economic growth keeps pace with population growth.

To be able to develop the frameworks for strategic goals and initiatives, a great deal of initial research was required. This entailed multiple discussions with project leaders of the various departments of the City of Cape Coral, community leaders and stakeholders, and numerous business representatives.

Project Review Committee

Members of the Review Committee who guided the plan are as follows:

- T. Sharon Woodberry, Economic Development Manager
- Matt Grambow, Special Projects Coordinator – City Manager's Office
- Laura Dodd, Principal Transportation Planner – Public Works
- Chad Boyko, Principal Planner – Development Services – Public Works
- Amy Yearsley, City Planning Manager – Development Services
- Bill Corbett, Design and Construction Manager - Capital Projects
- Melissa Mickey, Communications Manager - City Manager's Office
- Pamela Johnson, Deputy Director, Lee County Visitor & Convention Bureau
- Andreana Petersen - Business Recruitment/Retention Specialist
- Ashley Anderson - Business Recruitment/Retention Specialist

Stakeholders

Identified stakeholders who contributed invaluable input are as follows:

- James Sommers, RE/Max - Realtor, Residential
- Joseph Bonara, Catalyst Development - RE Developer
- Charles Pease, Cape Coral Technical College - Educator
- Annette Barbaccia, Miloff Aubuchon Realty Group - Realtor, Commercial
- Donna Shuman Germain, Cape Coral Chamber of Commerce - Business Leader
- Henrik Margard, Nor-Tech Boats - Manufacturer
- Larry Nygard, Crown Development - RE Developer

Business and Civic Interviewees

Business and civic leaders who provided additional information include:

- Jeremy Vincent – Jungle Bird and Front Porch Social
- Katie Locklin – Parks & Recreation, Program Supervisor
- JoAnn Elardo – Wicked Dolphin Rum Distillery
- Jeff Mielke - Lee County Sports Development
  Steve Geiger – General Manager Safe Harbor Marina

- Gary Aubachon – Local Developer building Slipaway, a Food Truck/ Marina destination
- Michael Ilcyzyszn – Cape Coral City Manager
- Bill Steinke – City Council Member & TDC Board (Ex-Officio)
- Barry Kadel – General Manager Westin Hotel

DATA COLLECTION & ANALYSIS

Demographics play an important part in any economic analysis, and DCG Corplan has originated a unique methodology for organizing information into useful topics that provides demographic, economic, and social data for a broad range of categories entitled Econographics. In most instances, the 2022 US Census data projected from the one-year average of the American Community Survey (ACS) have been employed. Additionally, some non-Census business data from has been drawn from a respected commercial source, ESRI.

Competing Locations

From a detailed analysis of similar-sized communities throughout the State there are **6** Florida cities identified as direct competitors to Cape Coral:

- Fort Lauderdale
- Orlando
- Palm Bay
- Pompano Beach
- Port St. Lucie
- West Palm Beach

Cape Coral's **35%** growth places it **2nd** among the competing cities. Some other important demographic metrics in Cape Coral's favor are:

- English spoken at home is indicator of the impact of immigration and attitudes toward education within the household. In this comparison, Cape Coral ranks **2nd**.

- Household size equates to possible worker availability, as median incomes offer strength for retail buying power. In these two groups, Cape Coral's **2.7** average household size and **$76,991** median household income ranks **3rd** in each case.

- Advanced educational attainment results in increased skills and higher salaries. In the categories of Associates Certificates, Bachelors' degrees, and Graduate degrees, Cape Coral ranks **2nd**, **5th**, and **6th**, respectively.

- Higher home ownership rate denotes economic stability, whereas lower housing prices suggests affordability. In these categories, Cape Coral's **76%** home ownership rate and **$379,600** median home value ranks the City at **3rd** and **4th** places, respectively.

- Reasonability on the Cost of Living index indicates stable economic performance. Cape Coral ranks **3rd** in this category.

- To determine the quality of life, three categories are examined: crime, healthcare, and culture. The Crime index, the Number of Physicians per 1,000 population, and the Arts, Tourism and Hospitality employment per 1,000 population are compared to the State of Florida's average to generate indices. In these three groups, Cape Coral ranks **3rd**, **4th**, and **4th**, respectively.

- Stable economies have a good balance of goods-producing and service-producing industries. The four goods-producing industries in the U.S. are (1) forestry, hunting and agriculture support; (2) mining; (3) construction; and (4) manufacturing. A ratio is produced through the division of goods-producing industry employment and service-producing industry employment. In this category, Cape Coal ranks in **3rd** place.

- Increasingly sophisticated business operations require a higher percentage of technically trained skilled workers at reasonable salary levels. In goods-producing industries, Cape Coral ranks **5th**; for service-producing industries the City's rank is **1st** place.

- Comparative land prices for commercial (non-residential) and industrial sites indicate valuation fluctuations per market. Cape Coral ranks **3rd** in lower land costs.

- Operating profits are significantly affected by the variation in electric power costs. For commercial power rates, Cape Coral ranks in **1st** place; for industrial rates, the City is in **2nd** place.

- Commutation outside of place of residence or having 2 or more vehicles available are indicators of relative mobility for employees. In these two categories, Cape Coral ranks **4th** and **1st**, respectively.

- As a second measure of worker mobility, the daily travel time workers exhibit reinforces the intercept location potential. Cape Coral **leads** all others competition.

Public Input

Resident input was sought through use of online surveys. A Public Survey was conducted in September 2023, and an Employer Survey in May 2024. The response rate was varied, with **1,841** for the Public and **162** for the Employer surveys.

- Public response was generally *unfavorable* towards effectiveness of local government in addressing community concerns, citing lack of clear planning vision, desire to reduce costs, and improve visual appeal of the City.

- Employer responses centered on regulatory approvals improvement, government transparency, and business costs control.

Two business meeting “roundtables” were held, oriented at bringing more awareness of available governmental assistance to the business community. The events occurred in April 2024 at the two Cape Coral libraries.

- Focus group discussions emphasized the need to adapt to demographic changes and evolving work trends with supportive infrastructures, such as enhanced business environments, improved training facilities, and streamlined governmental processes.

- There is a strong call for a community-driven approach to foster a conducive environment for both current residents and future economic prospects.

Tourism

Tourism interviews were conducted in June 2024. Some key takeaways from the interviews indicated that Cape Coral is situated to unlock its improved tourism driven economic potential. This is the opportune time for the city to take full advantage of its location, available land, resources, and human capital to advance the economic vitality of the city. To achieve this, it will need to move forward on several fronts:

- Build upon the city assets to enhance existing tourism products and attract new ones.
- Invest in smart infrastructure resources to support tourism related growth.
- Strengthen collaboration with private sector, public/private sector organizations, and other governments to advance tourism.
- Put plans into action, monitor progress, and adjust as needed.
- Attract more businesses that continue to contribute to the quality of life.

SWOT ANALYSIS

A SWOT analysis is a strategic planning tool that helps businesses and organizations evaluate their strengths, weaknesses, opportunities, and threats. This SWOT is based on a variety of qualitative and quantitative sources, including the Econographics review opinions gathered through the online survey and interview process, and the DCG Corplan Team observations. The SWOT can be defined as follows:

Strengths (S): performance worthy of continued promotion

Weaknesses (W): deteriorated performance, with unlikely capability of correction

Opportunities (O): emerging performance deserving of promotional development

Threats (T): weakening performance in danger of falling into deteriorated category and requiring immediate attention

In the following pages, the SWOT evaluation details the collective results of the input and encapsulates each category into a list of summary findings. These findings form the basis for a tactical means of developing outcomes through the use of the SWOT Matrix.

Cape Coral' Strengths

Econographics Outcomes	Online Surveys Comments	DCG Corplan Team Observations
Dynamic population growth	Living in paradise	Unique integration of land and water resources)
Literate workforce	Small town "feel"	Waterfront location fostering watersports activities
Low service industry wage patterns	Mangroves and coastal natural resources	Subtropical climate
Cost-saving commercial electric rates	Expansive water views	Engaged and informed public
Mobile labor force	Boating lifestyle	Active real estate development environment
	Proximity to major urban center (Fort Myers)	Forward-thinking political leadership
	Attraction for retirees	Large middle-class population
	Cape Coral Yacht Club	Major waterfront development of Westin Marina Village and Cape Harbour
	Large number of parks	Undeveloped natural coastal resources such as Redfish Point)
	Water resources such as Bimini Basin and Rubican Canal	Active local chamber of commerce
	One of safest cities in Florida	Active county VCB with a knowledgeable and experienced staff.
		Increasingly strong restaurant and food scene
		Major home rental market for vacationers, with home and boat
		Proximity to major urban center (Fort Myers)

Strength's Summary Findings:

1. *Dynamic growth*
2. *Civic engagement*
3. *Quality of Place*

Cape Coral's Weaknesses

Econographics Outcomes	Online Surveys Comments	DCG Corplan Team Observations
Too few younger aged workers	Lack of beaches and public waterfront	Absence of interstate highway connectivity
Rapidly aging population	Distance to I-75	Heavy traffic congestions along bridge corridors
Lack of racial/ethnic diversity	Ugliness of the city	Continuing hurricane risk
Low labor participation rate	Overdevelopment and rapid growth	Confusing street grid
High industrial rent pattern	Lack of greenspace	Suburban sprawl visual identity
Excessive travel to major airport	Destruction of mangroves and coastal resources	Isolated public waterfront use
	Continuing post-hurricane cleanups and restorations	Unavailability of ocean beaches
	Inadequate infrastructure and roadway conditions	Lack of tourism drivers
		Distance Between Attractions
		Limited Number of Hotel Rooms
		Limited access to water for additional tourism development
		Insufficient number of public boat ramps
		No Defined Visitor Domain
		Limited Night life
		Limited Tourism related signage
		Limited Retail Shopping Opportunities that are attractive to tourists
		Limited Public Transportation options
		Insufficient large businesses
		The city lacks a distinct visitor image
		Insufficient focus on tourism

Weaknesses Summary Findings:

1. Environmental risk
2. Physical reality
3. Economic limitations

Cape Coral's Opportunities

Econographics Outcomes	Online Surveys Comments	DCG Corplan Team Observations
Mature/senior workers for leadership positions	Development of affordable housing	Available land for expansion
Available female labor	Increasing the tree canopy	Undeveloped tourism and commerce use for canal system
More workers per household	Exciting developments such as Seven Islands	Bioretention development potential for stormwater mitigation
Adequate household spending potential	Family-oriented theme park	Environmental stewardship and resiliency leadership
Stable housing economy	Corporate office attraction and job creation	Promotion of solar and renewable energy generation
Moderate crime levels	Sports complex/convention center	Further Develop & Promote Parks & Preserves
Good quality of life drivers	More facilities for youth activities	Distinguish City's outdoor recreational assets
Commuting workforce capable of intercept		Further develop and promote the already existing cluster of attractions that are family friendly
		Enhance an already existing event schedule
		Enhance sports fields available for Sports Tourism
		Create (develop) more public boat ramps
		Develop package strategy to help promote attractions
		Educate locals on the benefits of tourism
		Engage and incentivize restaurants and merchants to take a more active role in tourism promotion and events

Opportunities Summary Findings:

1. *Environmental resiliency*
2. *Innovative development*
3. *Economic expansion*

Cape Coral's Threats

Econographics Outcomes	Online Surveys Comments	DCG Corplan Team Observations
Too few college graduates	Apparent lack of planning in favor of expedited growth	Over reliance on Fort Myers for shopping and entertainment
Moderately high good-producing industry wage patterns	Excessive traffic congestion	Lack of gateway welcoming signage or experience
Moderately high office rents	Unenforced traffic and cleanliness codes	Over building of rental housing as opposed to townhomes or condominiums
Restricted distribution capability to US market	Rising cost of living	Not enough commercial office development
Low retail sales per capita	Too many vacation rentals	Not enough industrial development
	Lack of sidewalks	Underdeveloped downtown urban core
	Unresponsiveness of city leadership	Limited retail opportunities
	Overdevelopment of car washes, dollar stores, and storage facilities	Limited cultural facilities
	Lack of supportive infrastructure	Limited shade tree canopy, street plantings, or street beautification
	Limited retail choices	Apparent public leadership distrust
	Failure of city identity as a thriving waterfront community	Increasing traffic congestion & limited parking
		Surrounding beaches drawing tourists from Cape Coral
		Neighboring destinations increasing their tourism funding
		Concern that FT. Myers Visitor's Bureau does not sufficiently promote Cape Coral
		Insufficient data regarding Cape Coral's contribution of tourist taxes
		Limited awareness of tourism assets among locals
		Difficult and slow permitting process for new development

Threats Summary Findings:

1. *Market timing & economy*
2. *Competition*
3. *Image*

A SWOT matrix was developed that compares internal values of Strengths (S) and Weaknesses (W) against the two external drivers of Opportunities (O) and Threats (T).

- Opportunities that capitalize on Strengths (S-T):
  - Evaluate means of balancing housing growth with expansion in jobs and non-residential tax revenue production.
  - Establish a public forum or outreach method that educates the public on environmental sustainability programs that are achievable and practical.
  - Establish a public forum or outreach method to discuss innovative approaches to land use that primarily serve the community.
  - Design and encourage dual-use environmental programs such as bioretention of stormwater that are both aesthetically pleasing but also functional.
  - Develop new land use guidelines that promote innovative ideas that capitalize on Cape Coral's unique character, such as canal use.

- Overcome Weaknesses to pursue Opportunities (W-O):
  - Evaluate and select resiliency solutions that can address short- and long-term impacts by major weather events.
  - Establish guidelines for new development projects that are sustainable to wind and flood impacts and that can provide dual-purpose functionality, such as a civic center serving as a hurricane shelter.
  - Recruit and pursue new business attraction that is not restricted to operate in high natural hazard areas, such as certain insurance companies.
  - Identify Cape Coral's realistic opportunity for new business attraction by evaluating industries' requirements for air, highway, water, and rail transportation services.

- Reduce vulnerability to external Threats (S-T):
  - Evaluate patterns of new population gain and entitle development of support retail and services to match growth.
  - Engage public support for new investments by demonstrating benefits to be derived locally.

- Create a public outreach to determine what retail or services categories are available in competing markets but not in Cape Coral.
- Engage the public for a series of visioning sessions to identify what type of city that Cape Coral is attempting to become.
- Utilize the best assets of Cape Coral, including new strategic approaches, to promote a new image for the city in marketing efforts.

❖ Prevent Weaknesses from being susceptible to external Threats (W-T):
  - Making informed investment decisions based on statistical probabilities of severe weather events.
  - Ascertain that media coverage of pre- and post-weather events are balanced and reinforce mitigation and recovery efforts.
  - "Best practices" review of competing areas' overcoming of physical limitations in marketing efforts.
  - Unbiased self-examination by leadership of Cape Coral's assets, drawbacks, and drivers for promotion.
  - Corrective measures to be taken to reinforce workforce performance and economic development initiatives for long-term change.
  - Awareness of the influence of competing cities for new business attraction and formulation of a plan to make substantive changes where possible to alter Cape Coral's limitations.

EMPLOYMENT TRENDS

In 2022, Cape Coral Business Employment was identified at **42,460** persons within **6,351** active businesses. Data for this conclusion was extrapolated from the US Census and ESRI. The five leading categories that accounted for **57%** of employment were:

❖ Retail Trade (**6,477** jobs)
❖ Healthcare & Social Assistance (**5,226** jobs)
❖ Accommodation & Food Services (**5,033** jobs)
❖ Construction (**3,974** jobs)
❖ Educational services (**3,489**)

The 5 leading major occupational categories for the 42,460 employment represent **20,489** jobs or **48%** of the total local employment:

- Sales and related (**12%**)
- Office and administrative support (**11%**)
- Food preparation and serving related (**11%**)
- Transportation and material moving (**7%**)
- Management (**7%**)

The 2022 Civilian Labor force estimate for the City of Cape Coral was **102,700** persons employed in **24** categories of occupations as defined by the Census. The **5** leading occupational groups accounted for nearly **half** of Cape Coral workers:

- Sales and related (**13%**)
- Office and administrative support (**12%**)
- Management (**10%)**
- Food preparation and serving related (**7%**)
- Health diagnosing, treating pract. & other technical (**7%)**

By weighted averaging of Census Journey to Work statistics, **57%** of the Resident Labor Force, or nearly **58,000** workers are leaving Cape Coral daily to work elsewhere. Capture of a significant share of those workers must become a priority for the City going forward.

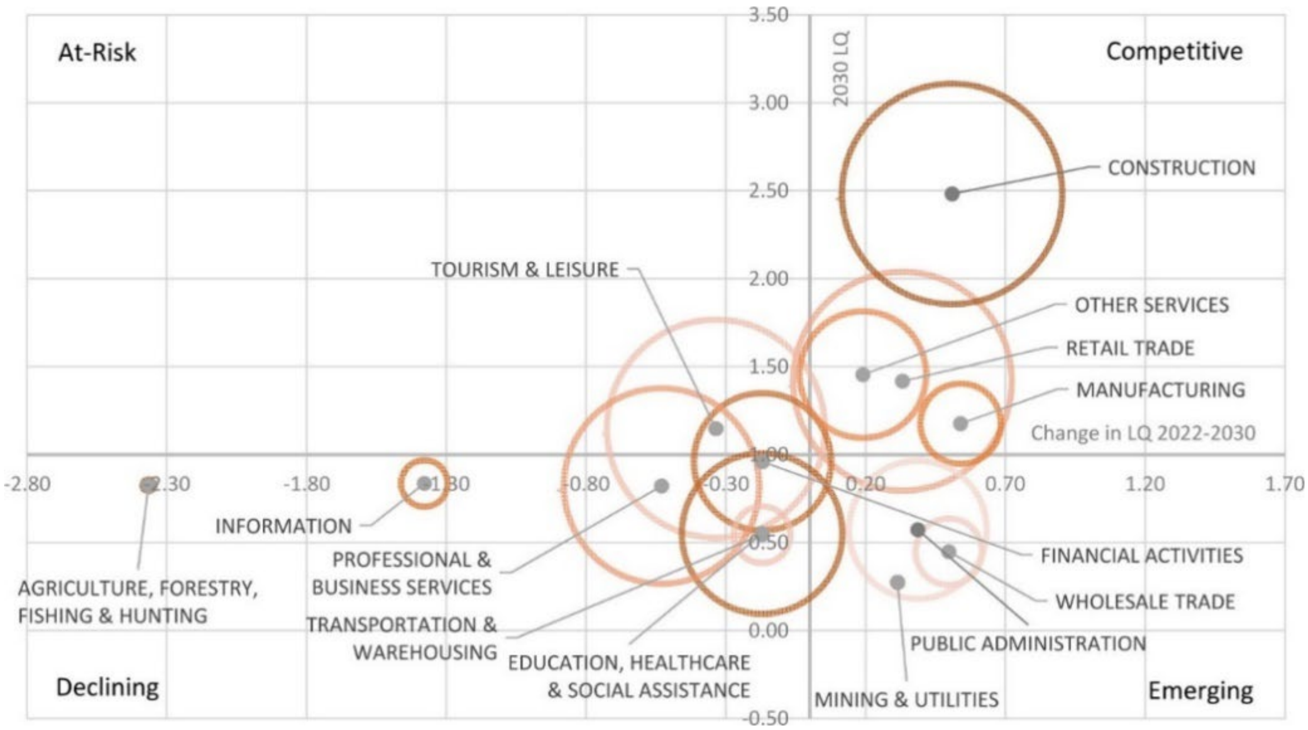
TARGET INDUSTRY ANALYSIS

The potential for economic advancement for the City of Cape Coral is evaluated by examination of the targeted industries for the area. The methodology for this analysis is the Location Quotients (*LQ*) tabular and charting technique. In this method, industry employment is plotted for the projected 2022-2030 period using Lee County and the State of Florida Long-Term Industry Employment projections. Increases in employment are generally considered as the truest indicator of business growth, revenue gains and profitability. The analysis forecasts those industries that are present in Cape Coral and that demonstrate growth opportunity or are of such legacy value that continuing efforts for sustainability are paramount.

The major industrial sectors present in Cape Coral are illustrated in the LQ chart. Each quadrant is labeled as follows: *Competitive* – dominant industries in the Region; *Emerging* – emerging industries not yet achieving critical mass; *At-Risk* – formerly strong industries (legacy) that are losing power and influence; or, *Declining* – industries that may be in danger of non-sustainability in the Region. The location of the employment "bubbles" on the chart demonstrates the industries' role for the local economy. Year 2022 employment of **42,460** is expected to grow by **4,234** jobs by 2030, totaling **46,694** positions.

Through a rigorous process, preliminary targets are developed through the following criteria:

- Industries that do not require support. Recruitment and attraction of companies in this area should continue to be encouraged.
- Industries that require economic development efforts to bring employment to a rate comparable to that of the State of Florida's.
- Industries that have no reported employment and are considered "missing" and therefore the establishment of the industry by new jobs.



The outcome is the identification of **65** 4-digit NAICS industries for Cape Coral in **11** major industry sectors. These industries represent the areas where the City should focus its marketing efforts as new opportunities for economic growth and expansion. In total, these industries represent a potential employment gain of **13,640** new jobs.

By way of a "cluster mapping" technique, **8** industries "clusters" emerge as targets for Cape Coral:

- Business & Financial Services (**3,675** jobs)
- Community Services (**3,927** jobs)
- Consumer Products & Services (**1,430** jobs)
- Culinary Tourism (**123** jobs)
- Healthcare & Life Sciences (**3,087** jobs)
- Industrial Services (**256** jobs)
- IT & Media (**770** jobs)
- Sustainable Real Estate (**372** jobs)

The 13,640 forecasted total employment for the 8 targeted industry clusters will produce a total of **15,162** new jobs (direct, indirect, and induced) and an annual total economic impact of **$3.358 billion**.

REAL ESTATE, LAND USE & INFRASTRUCTURE

The City of Cape Coral's **119** square mile area is catalogued by **127,830** individual property records totaling **57,213** acres not including canals and roadways. Utilizing Lee County's Property Appraiser records, there are total of **1,575** non-residential improved properties in **38** categories of building use.

The Commercial sector is segmented into Financial, Food Service, Lodging, Mixed Use, Offices, Recreation, Retail, and Service categories. In total, there are **1,032** buildings containing **10,469,780** sf, with an average age of **32** years. In the past ten years, **1,053,921** sf of inventory has been added, or a gain of **10** percent.

The Industrial sector is segmented into: Light manufacturing; Cannery, brewery, winery; Mineral processing; and, Warehousing, distribution terminals categories. In total, there are **332** buildings containing **4,970,503** sf, with an average age of **28** years. In the past ten years, **961,909** sf of inventory has been added, or a gain of **19** percent.

The Institutional sector is segmented into: Churches, Temples; Private schools & and colleges; Privately owned hospitals; Mortuary, Cemetery, Crematorium; and, Clubs, Lodges, Union Halls. In total, there are **87** buildings containing **1,227,137** sf, with an average age of **38** years. In the past ten years, **189,668** sf of inventory has been added, or a gain of **16** percent.

The Government sector is segmented into: Public County schools; Hospitals; Lee County - Other, State of Florida - Other; US Gov't – Other; and, City of Cape Coral - Other. In total, there are **108** buildings containing **4,964,644** sf, with an average age of **33** years. In the past ten years, **100,34**7 sf of inventory has been added, or a gain of **2** percent.

The Miscellaneous sector contains Utilities as the sole component. There are **16** buildings totaling **32,211** sf with an age of **28** yrs. In the past 10 years, no new construction has been added to the inventory, making this an inactive element. Existing construction has primarily occurred south of Pine Island Rd. on various roadways. The average building size is **2,013** sf.

In total, the 1,575 buildings account for **21,664,775** square feet of floor space. The building stock is largely older in nature, with a weighted average of **30** years occurring. In the past ten years, **4,367,796** sf of new space has between added to the inventory, or a gain of only **20**percent. Inventory growth has been witnessed in only **half** (19) of the 38 categories. Inventory gains have been led primarily by the top five categories, totaling **3,566,051** sf or **82%** of total new space:

- Stores, one story – **1,244,050** sf (**29%**)
- Community shopping centers -- **976,568** sf (**22%**)
- Warehousing, distribution terminals -- **899,690** sf (**21%**)
- Professional buildings -- **253,765** sf (**6%**)
- Supermarkets – **191,978** sf (**4%**)

Cape Coral's two Opportunity Zones (OZ) cover approximately **5,454** acres or **9** square miles, with a total of **17,371** parcels, **6,546** of which are vacant (**37%**). The City of Cape Coral owns **75** of the vacant parcels in OZ's, set aside for future use as well or other public assets, leaving a total of **6,471** parcels or **1,962** acres of vacant land in private ownership.

Infrastructure

The City of Cape Coral Information Technology Plan 2023 recommends expansion of the City's fiber ring to additional City assets. Primarily, those assets include:

- Parks
- Fire Stations
- Utilities
- Wells
- Master pumping stations

To meet the cabling goal, approximately **142** miles of fiber optic is being installed. According to the City's Information Technology Services (ITS) Dept. approximately **40%-50%** of the objective has been met. ITS suggests that a potential of **120** miles of dark fiber cable may be in excess. A potential could exist for leasing of unused cable capacity to commercial enterprises in the area.

The City of Cape Coral has also embarked on a smart city infrastructure through the innovations shown below:

- Surveillance cameras
- Public Wi-fi
- Informational kiosks
- License plate reader

An opportunity may exist for the City's Utilities and Public Works departments to implement Real-time IoT sensors that monitor street flooding and other resiliency information that can be integrated with Cape Coral's 3-1-1 network. While the City of Cape Coral is in the process of seeking alternative electric power options, a potential benefit may be gained from mass solar generation and storage. Commonly occurring power disruptions from weather events can be partially alleviated for critical use facilities simply through adequate solar generation management.

Given Cape Coral's unique location and degree of canal development, a particular emphasis is needed relative to storms and weather events. As Cape Coral continues to grow in population and impervious surface area, stormwater management will also increase in its demands on City services.

Perhaps an alternative course of action can be achieved through Low Impact Development (LID). LID is a management approach that can reduce runoff and pollutant loadings as close to its source as possible. LID includes overall site design approaches and individual small-scale stormwater management practices. These practices promote use of natural systems for infiltration, evapotranspiration, and harvesting and reuse of rainwater.

Transportation

Bus service in Cape Coral is provided by LeeTran as the City does not operate its own bus system. The bus lines serve the Southeast and Northeast Cape areas but the Southwest and Northwest neighborhoods are devoid of bus service. Future population growth is anticipated in these unserved areas and residents as well as seasonal visitors have no mass transit opportunities to utilize.

Microtransit might be able to meet coverage goals in areas that cannot support regular service in those areas not connected to fixed route systems at transit hubs. It could also serve as a tool to evaluate demand for expanded fixed route service hours or coverage.

In consideration of Cape Coral's extensive road and canal network, a serious examination of the potential of both land- and water-oriented micro transit systems should be evaluated.

WORKFORCE READINESS

Arising from Employer Survey (discussed earlier), polling indicated that **35%** of employers felt that minor job training was needed for new hires. Most business owners (**53%**) felt that government-sponsored training might be of some possible value to their business. And, **56%** felt that hiring skilled workers was the most prevalent challenge. However, only **16%** remarked that subsidized training was needed.

To identify job training requirements, a process has been developed where each 4-digit NAICS industry within the targeted clusters have the requisite occupations as provided by the Bureau of Labor Statistics (BLS) listed in descending order of occurrence in each industry. In total, the jobs shortfall for Cape Coral in the target clusters is **1,718** positions.

- The **1,718**-job shortfall for the Cape Coral target clusters covers **202** occupations with varying educational needs for entry, work experience in related occupation, and on-the-job training requirements. The top **20**-ranked fields cover **1,083** jobs or **64%** of the total shortfall.

- In the Cape Coral-Fort Myers MSA, there are **131** occupations in the 202 occupation shortfall list that are not accounted for, which is a total of **657** jobs. These missing figures represent **38%** of the job total and **65%** of the occupations. As educational attainment is the primary qualifier for these positions, the following summarizes the four levels of college attainment impacts:
    - The highest requirement of Doctoral or professional degree and ranked by numbers of missing jobs. For this category, **84** jobs in **17** occupations are missing from the MSA.

- For the 2nd level requirements of Master's degrees, there are **10** occupations totaling **31** jobs that are unavailable.
- For the 3rd level requirements of Bachelor's degrees, there are **28** occupations totaling **126** jobs that need filling.
- In the 4th level requirements of Associates' degrees, there are **10** occupations totaling **35** jobs that not fillable.

<u>The observable result of this evaluation is that the MSA and likely Cape Coral in particular are weak in the depth of professional and technical personnel available to be utilized by the target industries and clusters.</u>

Through a comparison of the fastest-growing occupations against the target clusters shortfall jobs, **13** matches occur in the following occupational groups:

- Healthcare Practitioner and Technical
- Life, Physical, and Social Sciences
- Transportation and Material Moving
- Healthcare Support
- Business and Financial
- Construction and Extraction
- Community and Social Services
- Computer and Mathematical
- Educational Instruction and Library
- Installation, Maintenance, and Repair
- Management
- Food Preparation and Serving
- Personal Care and Service

Conversely, there are **6** occupational groups that do not match the fastest-growing categories:

- Protective Service
- Office and Administrative Support
- Architecture and Engineering
- Legal

- Arts, Design, Entertainment, Sports, and Media
- Farming, Fishing and Forestry

It can be concluded that higher educational institutions are likely to be aware of the fastest-growing occupations and training is being adequately addressed in these areas. For the areas of mismatch, however, curriculum adjustments may not be that simple.

Higher Education

Colleges within fifty miles of Cape Coral granted **12,891** degrees in 2022. The **5** leading fields of study were as follows:

1. Liberal Arts and Sciences, General Studies and Humanities
2. Health Professions and Related Programs
3. Business, Management, Marketing, and Related Support Services
4. Health Professions and Related Programs
5. Education

For the areas of mismatch, it is apparent that adequate attention needs to be applied in the areas of architecture / engineering, legal, and visual/performing arts.

For Architecture and Engineering, the most sought-after degree is the Bachelor's degree. In Legal, it is the Doctoral or Professional. And, in Arts, Design, Entertainment, Sports and Media, it is again the Bachelor's degree. These 4 year-plus educational commitments might suggest the need for new university or college in Cape Coral. While this is a noble undertaking, it may not be necessary as online learning has become universally accepted over brick-and-mortar requirements.

The City should be aware of the shortfall jobs forecasted in this study can be addressed by active promotion regionally and nationally. A concerted effort should be made to seek professionals and specialists to consider Cape Coral as a new place to live, work and recreate. Attracting professional talent to a city is essential for economic growth and community vibrancy.

Strategy

The Vision

The second volume, The Course Ahead, outlines the vision for Cape Coral and defines **50** strategic initiatives within **5** major frameworks that focus on finding the way forward. Building upon the mission to ensure that economic growth keeps pace with population growth. The Strategy begins with a bold new vision for Cape Coral.

A city evolving from its suburban roots into a new urban paradigm as a self-sustaining network that promotes economic vitality together with lifestyle and cultural excellence.

The vision statement leads to identification of themes or "frameworks" from which strategic goals and initiatives have been developed:

A city ***evolving*** from its suburban roots into ***a new urban paradigm*** as a ***self-sustaining network*** that promotes ***economic vitality*** *together with* ***lifestyle and cultural*** *excellence.*

Five key concepts that emerge that have unique meanings for Cape Coral, each with a series of goals for the City to follow to achieve success.

Framework 1: Evolution and Change

Cape Coral is an evolving city. Its growth in population over a such short time span of existence is extraordinary and the expectations for nearly a doubling in size again over the next few decades is a story worth telling. At 119 square miles, Cape Coral is a large area, and its world-leading mileage of canals make the community a challenge to navigate.

Originally founded on the principal of an auto-centric suburban community, the realities of traffic congestion, the desire by residents for more urban amenities, the failure of its original plan in providing business centers, and the continuing demand on infrastructure to accommodate growth all put pressure on the basic nature of Cape Coral.

Finding a way forward so that Cape Coral has a clear concept of what type of city it is becoming is essential. Change is often a painful process, and the more that open dialogues can occur that help to address and possibly mitigate those discomforts, the better the outcome.

Goal 1.a: Public Outreach Method to Discuss Innovative Approaches to Land Use

From stakeholder interviews, public and employer surveys, and numerous conversations, an overarching issue that emerges is that Cape Coral does not appear to have any land use guidelines being utilized when approving major projects. While this is essentially untrue since there the City has Zoning controls through ordinance and code enforcement, the public nevertheless feels overlooked and is seeking some means of redressing the issue. Having a means of openly discussing how the City of Cape Coral is being shaped in the future is the thrust of this goal. The objective is to engage the public more openly on these approvals.

- **Initiative 1.a.1: Public Visioning Sessions for Cape Coral's Growth**

Semi-annual visioning an ongoing schedule. These gatherings should be based on general discussions on what the City of Cape Coral should aspire to achieve in the future, possible directions for future planning, and comparisons with other communities nationwide that have experienced similar growth. Recommended location would be the two public libraries.

- **Initiative 1.a.2: Committee of the Whole Public Access Website**

Creation of a new website for COW and Council projects reviews. The site should include downloadable graphics, videos, and PDFs of project summaries. Upgrades through Content Management System (CMS) to be conducted as needed.

❖ **Initiative 1.a.3: Citizen Advisory Committee for Public Input on Major Projects**

Establishment of a citizen's boards to act as a representative panel to advise the City Council of public opinion on policy issues. The CAC would present the reports from the Visioning sessions, summarize public response to the COW website, and attend all COW and Council meetings.

❖ **Initiative 1.a.4: Benefit/Cost Analysis for Future Projects**

When major projects are announced, they inevitably incur major cost. Whether a private or public investment, the value to the community must be weighed, not just from an economic impact, but from a social impact as well. The Benefit/Cost Analysis (BCA) provides the tools necessary to gauge whether a project has true social merit.

The BCA should be universally applied to all new project approvals, from both the public and the private sector. The result is a Benefit-Cost Ratio (BCR). A project is considered cost-effective when the BCR is **1.0** or greater. By setting a benchmark, Cape Coral can be assured that the outcomes are worth the risk taken.

Goal 1.b: Develop a Branding Identity for Cape Coral

The objective is to develop an identity for Cape Coral that recognizes small town "feel" with big city capabilities. Many people feel that Cape Coral has an intimacy that could be threatened by over development. Alternatively, others are impatiently seeking the urban amenities often found in other markets. The duality of large city and small town is a difficult challenge to answer. The objective is to develop an identity for Cape Coral that considers both viewpoints.

❖ **Initiative 1.b.1: Compelling Narrative and Tagline About Cape Coral**

Cape Coral needs a new narrative. A major advertising or marketing firm should be retained to develop a new "story" for Cape Coral that is focused on the future. The narrative needs to illustrate how the recreation-oriented lifestyle of this Florida community offers an ideal match for self-starters and home-based entrepreneurs. The engagement should also produce a new tagline phrase for the City.

❖ **Initiative 1.b.2: "Call to Arts" Program**

A City-wide "Call to Arts" program to be created that will attract national or possibly international attention. Local artists should be encouraged to place murals, sculpture, windchimes, and more to help educate the public about urban growth and the sophistication that implies. The City needs to explore how the competing forces of dynamic growth and change are affected by climate and nature. Given Cape Coral's location, the influence of water, wind, and the natural environment should be enough stimulus to inspire a group of artists to engage in creative commentary.

Installation of themed pieces in "discovery" locations throughout Cape Coral would be an engaging and delightful public amenity. A significant prize allowance for a large response should be entertained.

❖ **Initiative 1.b.3: Events that Celebrate Both Big City and Small-Town Living**

The dichotomy of big city life and small-town living is the dilemma Cape Coral presently finds itself. Cape Coral has several events that are held yearly which are successful and enjoyable, but there is always room for additions. We recommend an ambitious scheduling of events in different parts of the City that are focused on bringing residents and businesses together. Suggestions include:

- City-wide donation drive (school supplies, baby items non-perishable food, etc.).
- Black tie gala and silent auction (local business sponsorship)
- Charity concert (concert for a social cause)
- Cape Coral heritage celebration ("Waterfront Wonderland", for example).
- Cultural food festival (different tastes, fusion, etc.)

Framework 2: A New Urban Model

Cape Coral's unique location is also its drawback. This is a city with no seaports, airports, train stations, interstate highway access, or municipal bus system. But, with a growing population already exceeding metropolises such as Salt Lake City, connectivity plays a crucial role in Cape Coral's future.

Goal 2.a: Cape Coral as a Network of Interconnected Neighborhoods

In all cities, neighborhoods form the basis in which residents can most easily relate to their environment. By nature of the original design of the City, there are identifiable quadrants of Cape Coral which have geographical identity. Through the street grid, fiber optics, or water canals, a connectivity exists that helps unify the neighborhoods. This vast network that might be thought by others of as detriment should be considered as Cape Coral's strength, if the quadrants can focus on promoting their individuality.

❖ **Initiative 2.a.1: Cape Coral's IT Infrastructure Promotion**

In partnership with Lee County, a robust fiber optic cable network is being installed throughout Cape Coral, bringing high-speed internet and cable television service to virtually all locations. As part of this investment, there is an opportunity to lease excess capacity or "dark" fiber to the business or academic community that will provide revenue back to the City. The connectivity advantage for business development is a strong driver.

We would recommend that the City promote its digital advantages as well as explore areas where data aggregation provided through IT infrastructure can best be used to make citizens' lives and business operations even more productive. Efforts should be undertaken to once again receive the Digital City award.

❖ **Initiative 2.a.2: On Demand Water Mobility Transportation System**

While electric scooters, golf carts, bike-sharing and other wheel-based micromobility vehicles are becoming prevalent in major cities, we would like to propose a new mobility system tailored to Cape Coral: On-demand water mobility. Cape Coral water taxi terminus locations at the ends of saltwater canals that are in proximity to major thoroughfares of Del Prado Blvd., Cape Coral Parkway, Veterans Parkway, or will serve the Bimini Basin should be considered. If parking areas at these ferry stops can be arranged, suitable property should be acquired. Alternatively, microtransit coordination between residential and ferry terminus locations could offer a unique transportation linkage system.

❖ **Initiative 2.a.3: Four-Quadrants Commission on Neighborhood Identity and Wayfinding**

The creation of an advisory 4-Quadrants Commission to study how wayfinding elements can be implemented throughout the City. This group should be made up of local merchants, active residents, and City personnel whose work or living experiences orient them more toward an individual quadrant.

Goal 2.b: Promote Policies that Focus on Infill Development and Waterfront Accessibility

Cape Coral's land platting technique has allowed thousands of families to own waterfront homes at affordable prices. With that focus on the single-family model without implementing the needed town centers or the progressive zoning methods that would allow for mixes of commercial or multi-family integrated the landscape comes the inevitable outcome of suburban sprawl. Developers are now concentrating on mixed-use projects as a solution, but a more concentrated effort is required to salvage key properties that will promote infill and access to waterfronts.

Initiative 2.b.1: Opportunity Multiplex Program

The Opportunity Multiplex Program is a methodology where higher density housing can be pre-permitted on assembled lots within Opportunity Zones. In the Level-One program, a two-story duplex is constructed on **2** combined lots. Each lot contains **4** allowed units, and a total of **8** units are produced. In the Level-Two program, **3** lots are combined to produce a triplex of **12** units. In the Level-Three program, **4** lots are combined into a quadraplex of **16** units. Pre-permitting will allow fast-tracking development for affordable housing.

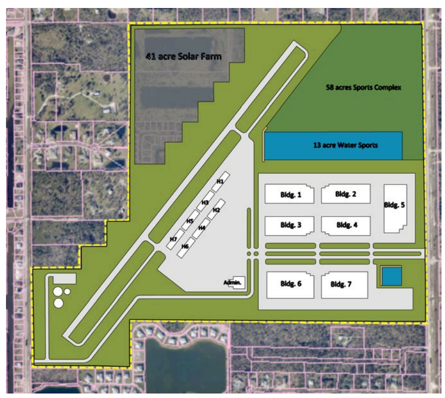
- **Initiative 2.b.2: Cape Coral Land Bank**

Cape Coral Land Bank (CCLB) will operate in cooperation with the City as a non-profit Public-Private Partnership (P3), with the objective of acquiring and holding prime vacant properties for transferring, reselling, or reinvesting in areas where the City would like to achieve economic development outcomes. The CCLB should be able to offer incentivized property swaps to current residents such as two-for one lot transfers or above market purchase allowances to encourage existing property owners to participate in deals that ultimately are dedicated to public good. Above all else, the core mission of the Cape Coral Land Bank must be the exercise of its responsibility to achieve positive economic development results for the City.

- **Initiative 2.b.3: Strategic Site Assemblage Tax Credit**

The Strategic Site Assemblage Impact Fee Tax Credit will defer impact fees for road and utility capital expenses on sites that assemble at least three pre-platted housing lots for development of affordable housing. For commercial properties, the program will engage if assemblage of at least two commercial lots or an assemblage of a **50%** increased lot area accomplished by a mix of commercial or residential lots A requirement for this incentive application in business use would be the application toward at least one the of the targeted industry clusters.

Goal 2.c: Propose Signature Developments that will Generate Identity for the City



What makes a great city? Very often it is the landmarks that distinguish a place and make it memorable in the minds of residents and visitors. Cape Coral needs a few signature projects to help give it identity and appeal. The City can facilitate such projects through planning or incentivization or it can construct them itself.

Initiative 2.c.1: Cape Coral Executive Airport

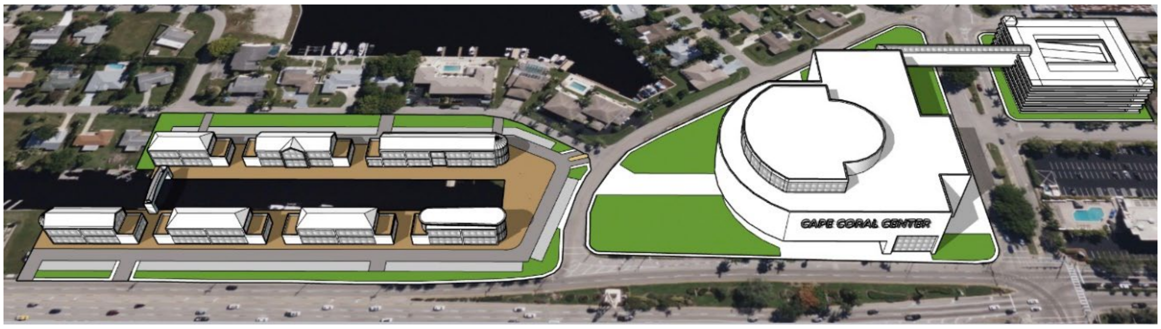
Development of an executive airport with accompanying industrial park, recreation fields, and a solar farm on a City-owned parcel on Burnt Store Road with eminent domain acquisition of surround properties. The City would develop the land, provide the airport runway, hangars, tie-down areas, and administration building, plus utility and road infrastructure to support an industrial park built by others. A series of recreation fields and a large solar farm would also be constructed with public money.

- **Initiative 2.c.2: Cape Coral Corporate Park**

Development of a business park on City-owned land along Del Prado Blvd. N. The property's is high degree of wetland and protected vegetative areas requires a careful clustering of buildings that still allow the natural environment to survive is the correct approach. The City will subdivide the property and construct roads and utilities to serve several Class A office buildings, high cube warehouses, and flex industrial buildings to be built by others.

- **Initiative 2.c.3: Downtown Civic Center & Entertainment District**

The development of a new multi-function Civic Center to be constructed on a visibly dominant downtown site that will serve as a landmark for visitors and residents alike in the CRA. In support of the Civic Center, a new waterfront Entertainment District to be developed along Cape Coral Pkwy, and the Norfolk Canal. A north and South Riverwalk-style esplanade containing shops, restaurants, and bars would add the missing tourism destination that Cape Coral is needing.

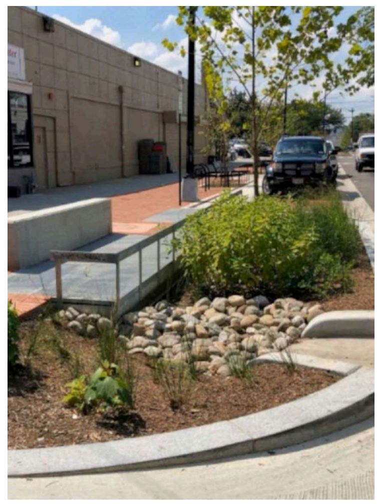


Framework 3: Sustainability & Resilience

Sustainability and resilience are two concepts that are often used together to describe the ability to create systems that can withstand change and thrive in the face of it. The terms are complementary concepts that support each other.

Goal 3.a: Evaluate Resiliency Solutions for Impacts by Major Weather Events

Hurricane Ian was a recent reminder of the destructive nature of major weather events. Preparedness for the future as well as utilizing resiliency techniques is imperative for coastal communities such as Cape Coral.

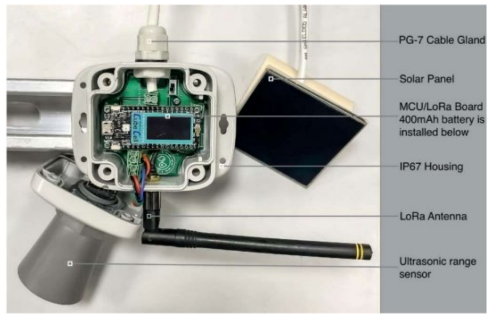


Initiative 3.a.1: Low Impact Storm Water Infrastructure Program

Low Impact Development (LID). LID is a management approach that can reduce runoff and pollutant loadings as close to its source as possible. The program will cover prototype development of bioretention, rain harvesting, and permeable pavement techniques for wide-spread application.

❖ **Initiative 3.a.2: Cape Coral FloodWatch Program**

City's Utilities and Public Works departments will be engaged to install Real-time IoT sensors that monitor street flooding and other resiliency information that can be integrated with Cape Coral's 3-1-1 network. The FloodNet technology is open-sourced and free to use.



❖ **Initiative 3.a.3: Cape Blue Incentive**

Cape Blue incentive will specifically promote water saving and storm water runoff control through bio-retention measures such as rain gardens, rainwater harvesting, stormwater gardens, tree boxes, xeriscaping, and permeable pavement. This is a **5**-year incentive that will provide a cash grant at two levels:

- Level One: **25%** reduction in water use OR **25%** stormwater run-off mitigation
- Level Two: **50%** reduction in water use OR **50%** stormwater run-off mitigation

Goal 3.b: Educate the Public on Practical Environmental Sustainability Programs

While protecting the environment is a topic of universal concern, not everyone is cognizant of the means or impacts of using environmental sustainability tools. Cape Coral is a unique waterfront ecosystem unlike those on the Gulf shores. Sensitivity to locally relevant environmental sustainability methodologies is important, as is energy and resource conservation measures.

❖ **Initiative 3.b.1: Cape Coral Eco-Newsletter and Blog**

Monthly Cape Coral Eco-Newsletter that can be circulated both in print and online that discusses the roles of environmental stewards, the interaction of native plants with the built environment, energy sustainability, storm water mitigation, and other topics germane to the environment. A running blog post should accompany the online version of the newsletter.

❖ **Initiative 3.b.2: Solar Community Cooperative Task Force**

Solar Community Cooperative Task Force to be created to study where solar farms of varying sizes can be deployed throughout the City and how local community areas can directly benefit by becoming solar cooperatives.

Framework 4: Economic Vitality

Economic vitality could be called a process to improve the economic well-being of the community. It encourages employment opportunities, improves the socio- economic opportunities for citizens, expands the local tax base, and facilitates economic opportunity.

Goal 4.a: Expand the Role of the Office of Economic & Business Development

As defined in the Vision statement, it is the goal of this plan to promote economic vitality in Cape Coral, recognizing that economic growth must keep pace with population growth. This is an essential role of economic development and municipal leadership can achieve outstanding results. OEBD can play a larger role in this achieving economic vitality for Cape Coral.

❖ **Initiative 4.a.1: OEBD Elevation to Full Department Status**

Elevation of the OEBD to full department status, with some use of the General Fund to be allocated for the development of incentive packages, enhanced marketing programs, speculative development of catalyst projects, and increased staff. Additionally move the CRA under OEBD in the new department.

❖ **Initiative 4.a.2: Independent Economic Development Website**

Creation of a new website for the OEBD independent of the City's website structure. "SiteFinders" utility and updated demographic and business data required on continuing schedule through Content Management System (CMS).

- **Initiative 4.a.3: Economic Impact Analyses for All Capital Expense Projects**

The role of the OEBD should be one of mediator for capital expense outlays, helping to demonstrate the viability of anticipated spending in view of strategic directions the City is planning to navigate in the future. Judicious use of EIAs can be quite beneficial in helping to chart that course. A representative of the OEBD to be educated on the use of IMPLAN EIA software and that an annual subscription be purchased for use by the City for ongoing EIA analyses.

- **Initiative 4.a.4: Accredited Economic Development Organization Status**

The International Council of Economic Developers (IEDC) is the premier US membership group of Economic Development Organizations (EDOs). The OEBD to apply for certification Accredited Economic Development Organization (AEDO). A self-examination by the OEBD to determine what milestones might be needed to be reached to achieve AEDO confirmation.

- **Initiative 4.a.5: One-Stop-Shop for Business Development**

The City of Cape Coral to create a One-Stop Shop for Business Development that would have mostly virtual self-services, minimal staff, printed materials for take-home, and an accompanying on-line presence. The facility to be would be administrated by the OEBD which would coordinate its activities with other departments.

Goal 4.b: Support Existing Business Retention & Expansion

Among those businesses polled, an overwhelming majority responded negatively about the permitting process for new project approvals. Maintaining a positive relationship with existing businesses is a crucial step towards economic growth. Whether by offering specialized training, business assistance, or vocational education for a new workforce, business retention and expansion is vital.

- **Initiative 4.b.1: Streamline the Permitting Process**

Retaining of an independent efficiency expert who can pinpoint bottlenecks in the permitting process and recommend improvement in operations. Additionally, a downloadable database of properties that will provide type of permits needed, the links to those applications from Development Services, and an approximation of the time required to obtain approvals if the intended use is executed. This could be a coordination between the new OEBD website and the One-Stop-Shop.

- **Initiative 4.b.2: Cape Coral Executive Corps**

A corps of knowledgeable business leaders would undergo basic teaching training by the Cape Coral Technical College and then be paid by the City for lectures or seminars that they conduct. A survey of current residents to be conducted to ascertain the numbers and experience level of volunteers who would participate. The OEBD should create a plaque or award program to honor those individuals who will participate.

- **Initiative 4.b.3: Vocational Training Silos for the Trades**

From an Employer Survey conducted online, the mixed picture of training being a need for businesses probably indicates that businesses are unaware of training opportunities. When asked if partnerships with local educational institutions would be important, an overwhelming **61%** said that such alliances could be valuable.

The OEBD will retain an outside consultant to canvas industry roundtables attendees and employer survey responders regarding their training needs. The results of this analysis will be furnished to the educational community to determine if vertical silos are being provided for new hires to be ready for employment, especially in the trades.

Goal 4.c: Promote New Targeted Industries and Clusters

Eight targeted industry clusters have been identified for Cape Coral. With the goal of generating **13,640** new jobs, promotion must be achieved to attract new businesses. To be effective, an incentivization for job creation, the production of industry-specific marketing materials, and tours of Cape Coral for prospective employers needs to be undertaken.

- **Initiative 4.c.1: Establish Working Group for Each Target Industry Cluster**

The formation of working groups for each of the **8** targeted industry clusters. Each group consists of a representative from OEBD and the City Manager's office, plus at least **3** industry leaders from the Cape Coral business community. Marketing of each cluster to be funded, plus consultation with public relations firm on the types of campaigns needed for each cluster to successfully move forward.

- **Initiative 4.c.2: Targeted Industry Job Creation Grant**

The Target Industry Job Creation Grant will be a performance-based incentive with multiple tiers of cash awards. The incentives would be paid to employers who can demonstrate sustainability of employment and achievement of promised hiring goals. The cash award would be paid in a three-year installment after submittal by the grantor that employment and compensation levels were met.

- **Initiative 4.c.3: Target Industry Prospectuses**

Marketing reports for each of the **8** targeted industry clusters should be prepared that illustrate why Cape Coral is a good "fit" for technology companies. The industry prospectuses presented in Volume 1 of this report are a good start but more needs to be done. Results of the Working Groups consultation will determine contents of each prospectus. Data developed during this study to be updated periodically. The materials should also feature available incentives and the ongoing efforts of The Course Ahead to facilitate development.

- **Initiative 4.c.4: Industry Familiarization Tours**

As part of a marketing and promotional strategy of the new targeted industry clusters the OEBD will conduct Industry familiarization (FAM) tours for executives of leading companies and corporate site selectors. The City will provide marketing materials that will illustrate the new directions that Cape Coral is headed and how attraction of corporate interest would be accommodated.

FAM tours should be conducted for each cluster with special events and hospitality services prepared to highlight the industry. Travel reimbursements should be arranged to provide adequate visitor experiences for the events.

Goal 4.d: Engage Higher Education in Workforce Development

The role of higher education is essential in preparing the workforce for future jobs. While on-the-job training is widely employed, enhanced skills development must be provided for new hires or re-skilled workers in targeted industries.   Successful, recruitment of new employers will depend on the availability of appropriately educated labor force and curriculum development is necessary for that support. Incubation for new business creation is also greatly dependent on partnerships with higher education.

- **Initiative 4.d.1: Expansion of Online Learning Opportunities**

Promote online learning as a cost-effective and reasonable alternative to expensive college education for working families. The OEBD should continue coordination with local higher education institutions in the area to expand course offerings in the shortfall curriculums so that a work-ready labor force can be utilized to successfully support the targeted industries and clusters.

- **Initiative 4.d.2: Cape Coral Startup Support Center**

Partnering with local higher education institutions, the Cape Coral Startup Support Center will operate as a hybrid incubator and accelerator program. While the incubator component focuses on refining startup ideas and providing a supportive environment, the accelerator component will offer more structured, intensive programs to turn startups into scalable businesses. A suitable commercial space should be obtained for use and the program should be formed as a public-private-partnership between the OEBD and angel investors or venture capitalists. The objective will be the formation of new companies in the targeted clusters.

Framework 5: Lifestyle & Cultural Excellence

To provide excellence in lifestyle and culture pursuits, the City of Cape Coral must broaden its appeal for both residents and visitors. That may require creative approaches to those drivers that will generate more interest to the City, especially in leisure activities.

Goal 5.a: Attract the Interest of Major Retailers and Hospitality Vendors

Cape Coral has a wide range of retailers, but there is a desire by residents polled to attract more major brands to the City. With no indoor regional mall and little hotel space to promote, Cape Coral must develop a means of generating appeal to major retailers and hospitality vendors.

- **Initiative 5.a.1: Pop-Up Retail Fairs**

The City should consider use of "pop-up" retail events, retail fairs, and other venues to encourage chain retailers to examine Cape Coral's large buying public and recognize the revenue possibilities created by fulfilling the unmet desires of this growing population. The integration of entertainment or dining with retail should be promoted a way of enhancing the retail experience.

❖ **Initiative 5.a.2: Consumer Spending Potential Reports**

From this study, a significant amount of data on the retail, food services, and hospitality industries have been examined. Where and to what degree shoppers in Cape Coral spend in local establishments can be partially tracked through AI-assisted leakage analysis. However, the effect of e-commerce continues to hamper irrational gap-leakage analyses.

We recommend that a Consumer Spending Potential report be produced from these available data sources that can used in marketing Cape Coral to prospective retailers and hospitality vendors. The report can be assembled into sections that have applicability to individual industries.

Goal 5.b: Recognize the Importance of Tourism to the Overall Economy

Although Cape Coral is not currently considered or recognized as a destination city, it is well positioned to improve its quality, status, and reputation as a tourist destination. The City needs to invest resources to enhance its attractions and events that are currently drivers of visitor activity. New attractions need to be developed, especially in light of Cape Coral's relaxed atmosphere, its connection to water, the availability to be active and involved with sports, its food scene, family friendly activities, and the many opportunities to commune with nature.

❖ **Initiative 5.b.1: Increase Activity and Access to Cape Coral's Waterfront**

The City to identify, attract, and work with private sector operators who can provide shoreline attractions, restaurants, etc. and activities such as themed boat tours, fishing, sailing lessons, jet skiing, specialty boats, kayaks, canoes, etc.

❖ **Initiative 5.b.2: Promote Experiential Tourism Product by Expanding Outdoor Activities**

The City should work with the vacation rental community and hotels to identify, develop, and promote visitor experiences such as: outdoor and water adventure activities (zip lines, flooms, boating, etc.), Food and drink (interactive experiences at restaurants and brew masters), and Arts and culture programming (opportunities to meet artists, tour cultural and historic locations).

❖ Initiative 5.b.3: Explore Opportunities to Work with Short-Term Rental Providers

The City is to develop partnerships with the various rental platform sites to help with acquiring new listings and joint promotions. Partner with the Ft. Myers VCB, nonprofits, or universities to educate the destination's current and potential hosts to provide a better experience for the visitors and better manage their businesses to be more profitable. Promote Cape Coral as a desirable and remote-worker friendly destination for short-term stays that tie into tourism and leisure activities.

❖ Initiative 5.b.4: Further Develop the Already Existing Family Activity Cluster

The City is to engage a six-step program:

1. Bring the current attractions together to obtain ideas as to how they can work together to better deliver a coordinated product, determine what else should be added to the mix, and how to better market and brand the family activity cluster.
2. Identify additional family related activities such as disc golf, laser tag, golf driving range, and indoor gaming arcade with ax throwing, climbing walls, etc.
3. Identify supporting infrastructure, such as restaurants and retail.
4. Find interested developers to build the attractions and infrastructure.
5. Help those developers achieve their objectives.
6. Actively market this family friendly activity cluster.

❖ Initiative 5.b.5: Further Develop Youth, Adult & Scholastic Sports Facilities

The City is to upgrade the current sports fields and build new ones to support sports tourism. This will entail working together with the Athletic Division to develop Pickleball competitions at the new Racquet Facility and making the sports tourism visitors aware of Cape Coral's strong food scene.

❖ Initiative 5.b.6: Enhance & Develop New Visitor-Focused Events

The City to stimulate and act as a catalyst to create new events that will attract tourists. Develop a committee that will review the current schedule with the objective of finding ways to enhance or create new events and festivals. Concentrate on those assets that are unique or particularly strong in Cape Coral.

- **Initiative 5.b.7: Support More Unique Local Dining Options & Enhanced Evening Activities**

The City will identify ways to further develop infrastructure in the "food" zones and recruit restaurant operators to open unique concepts and differing cuisines in concentrated areas. Support the growth of small food businesses that expand dining options in the City and communicate with local universities to investigate their interest in a culinary school.

- **Initiative 5.b.8: Encourage Cross-Promotion and Joint Packaging Among Related Attractions**

The OEBD will serve as a formal and informal convener and facilitator of partnership conversation among related attractions. These partnerships could be incentivized by promotional opportunities offered by the City or VCB. The City to create "Cape Coral Pass" that leverages partnerships between attractions, transportation services, hotels, and dining establishments to create value-packed deals that encourage tourists to explore more of what the destination has to offer.

- **Initiative 5.b.9: Energize & Educate Locals About Tourism in Cape Coral**

The City to promote tourist attractions and engage an overall plan to targeted locals. Host annual one-day tourism summits for key leaders and stakeholders with speakers highlighting tourism assets and potential tourism development activities. Provide space at the tourism summit for individual attractions to have booths to promote themselves.

- **Initiative 5.b.10: Consider a Co-Op Marketing Approach with Certain Attractions**

Co-op marketing allows attractions to access high-value placements that they would struggle to achieve with their own resources. It is important to ensure that Cape Coral organizations take greater advantage of this program and find new ways to stretch their marketing dollars and test new/emerging tactics. The City is to develop a list of attractions and businesses to target for joining co-op marketing opportunities.

❖ **Initiative 5.b.11: Tourism Leadership & Collaboration / Partnerships**

The City is to contact local leaders with a knowledge of tourism and hospitality need to be about taking an active role in leading the charge to improve the tourism environment in Cape Coral. In addition, coordination meetings with planned agendas are needed among the potential partner organizations. These collaborations and partnerships should facilitate the greater sharing of resources such as video, photography, and written content on City experiences and amenities.

❖ **Initiative 5.b.12: Engage Higher Education Institutions as a Catalyst**

The City to engage relevant individuals at the various institutions of higher education on potential areas for partnership. These include organizational and board participation, placemaking advocacy within the county and city economic development efforts. Universities may be interested partners in efforts to create workforce development pipelines that help address workforce gaps in the tourism industry and providing research and expertise through professors and internship programs.

❖ **Initiative 5.b.13: Designate an Individual to be Responsible for Tourism**

The City is to assign tourism responsibility to the appropriate person who is already on staff. It should then find one or two interns to assist this person. Over time, the City is to review the current and expected future amount of tourism related work by the individual from the City Manager's office and the interns, and the return on investment from having the tourism person on staff to determine what resources are needed.

Conclusions

The City should recognize that a concentrated effort will be necessary to address these initiatives, many simultaneously, and in an orchestrated fashion that promotes new business attraction but also permits affordable entrepreneurship opportunities for Cape Coral residents.

The Economic Development Strategic Plan indicates the order in which the initiatives are implemented how they are funded, and who will administer them. And as with any strategic plan, *The Course Ahead* must be considered as a "living" document that will require periodic examination and revisions as new elements or economic conditions are encountered will impact economic sustainability and growth.

Summary of Priorities

From a Funds-, Personnel-, or Time-intensive viewpoint, the **50** strategic initiatives can be organized into hierarchies for approach (evaluated by annual impacts). The initial **34** items of Critical Importance are as follows:

Level One Priority (low resource demand)

Critical items that require the least resource demand should be set as the first priority. These represent "low hanging fruit" will be the easiest to achieve positive outcomes. The following **9** Action items are not necessarily listed in order of need:

Strategic Initiative	Duration (years)	Total estimated Cost
Public Visioning Sessions for Cape Coral's Growth	5	$133,000
Committee of the Whole Public Access Website	10	$129,100
Citizen Advisory Committee for Public Input on Major Projects	10	$114,100
Benefit/Cost Analysis for Future Projects	10	$187,800
Independent Economic Development Website	10	$203,100
Economic Impact analyses for all Capital Expense Projects	10	$403,900
Consumer Spending Potential Reports	5	$212,300
Explore Opportunities to Work with Short-Term Rental Providers	5	$80,000
Consider A Co-Op Marketing Approach with Certain Attractions	4	$146,600
Public Visioning Sessions for Cape Coral's Growth	5	$133,000

Level Two Priority (moderate resource demand)

The **15** Action items of critical need but of somewhat greater resource demand are as follows:

Strategic Initiative	Duration (years)	Total estimated Cost
Working Group for Each Target Industry Cluster	5	$415,300
Compelling Narrative and Tagline about Cape Coral	3	$510,100
4-Quadrants Commission on Neighborhood Identity and Wayfinding	4	$108,000
Opportunity Multiplex Program	10	$1,147,000

One-Stop-Shop for Business Development	9	$2,523,800
Streamline the Permitting Process	4	$313,000
Cape Coral Executive Corps	4	$813,900
Target Industry Prospectuses	4	$254,800
Expansion of Online Learning Opportunities	6	$114,500
Pop-Up Retail Fairs	3	$241,900
Enhance & Develop New Visitor-Focused Events	4	$209,100
Support More Unique Local Dining Options & Enhanced Evening Activities	4	$104,800
Encourage Cross-Promotion and Joint Packaging Among Related Attractions	3	$192,700
Tourism Leadership & Collaboration / Partnerships	4	$259,100
Designate To Be Responsible for Tourism	4	$209,100

Level Three Priority (highest resource demand)

The **10** Action items of critical need but of the highest resource demand and will take the longest to accomplish with the largest funding requirements are as follows:

Strategic Initiative	Duration (years)	Total estimated Cost
On Demand Water Mobility Transportation System	7	$8,160,800
Cape Coral Land Bank	4	$20,000,000
Strategic Site Assemblage Tax Credit	5	$10,000,000
Low Impact Storm Water Infrastructure Program	9	$7,080,000
Cape Coral FloodWatch Program	9	$3,016,400
Cape Blue Incentive	9	$3,507,400
OEBD Elevation to Full Department Status	3	$8,654,500
Target Industry Job Creation Grant	4	$659,100
Cape Coral Startup Support Center	7	$5,766,500
Further Develop Youth, Adult & Scholastic Sports Facilities	5	$924,700

Items of Non-Immediate Need

Although important, the remaining **16** initiatives are not immediately essential.

Low Resource demand (**2** in total)

Strategic Initiative	Duration (years)	Total estimated Cost
Cape Coral Eco-Newsletter and Blog	3	$77,400
Further Develop the Already Existing Family Activity Cluster	3	$92,400

Moderate Resource demand (**10** in total)

Strategic Initiative	Duration (years)	Total estimated Cost
Events that Celebrate Both Big City and Small-Town Living	5	$611,000
Solar Community Cooperative Task Force	3	$61,800
Accredited Economic Development Organization Status	3	$77,400
Vocational Training Silos for the Trades	3	$55,900
Industry Familiarization Tours	3	$292,700
Increase Activity and Access to Cape Coral's Waterfront	4	$209,100
Promote Experiential Tourism Product by Expanding Outdoor Activities	3	$46,500
Energize & Educate Locals About Tourism In Cape Coral	4	$129,800
Engage Higher Education Institutions as A Catalyst	4	$104,800
Cape Coral's IT Infrastructure Promotion	4	$104,800

High Resource Demand (**4** in total)

Strategic Initiative	Duration (years)	Total estimated Cost
"Call to Arts" Program	4	$2,442,200
Cape Coral Executive Airport	9	$83,315,600
Cape Coral Corporate Park	8	$55,322,000
Downtown Civic Center & Entertainment District	7	$119,057,800

If all 50 strategic initiatives were implemented, we estimate that an overall expenditure of **$281.3 million** would be required during an operational period of **10** years (in 2024 dollars). However, if only the action items of critical need were implemented (**34** initiatives), the total

2024-dollar cost would be **$65.0 million**. For the non-immediate action items (**16** initiatives), the total 2024-dollar cost would be **$216.3 million**.

In the table below, a cumulative 10-year timeline is presented. New **13,640** job growth economic impacts developed in Volume 1 totaled **$3.358 billion** annually; however, it is assumed that job creation would take for full 10 years to materialize, so the table shows a **10%** increase yearly to reach the 10-year 100% complement.

The net economic impact considers implementation of all 50 strategic initiatives. A 10-year Net Present Value (NPV) of **$12.526 billion** represents a return to the City of Cape Coral of nearly **$45** for each **$1** invested in the Strategic Economic Development Plan.

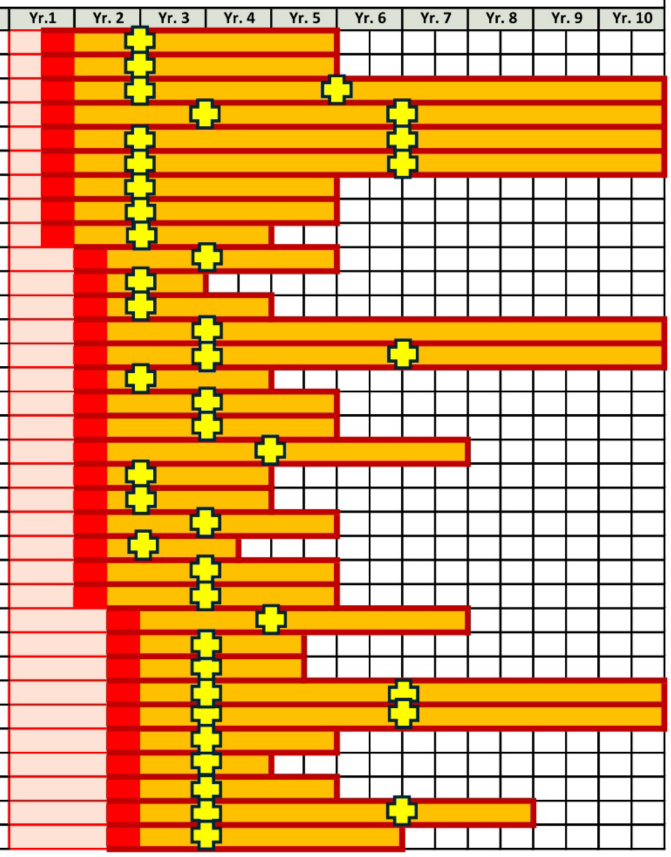
10-Year Timeline	Jobs Impacts	EDSP Cost	Net Impacts
Yr. 1	$ 335,756,000	$ 9,250,400	$ 326,505,600
Yr. 2	$ 671,512,000	$ 77,869,900	$ 593,642,100
Yr. 3	$ 1,007,267,000	$ 79,282,800	$ 927,984,200
Yr. 4	$ 1,343,023,000	$ 106,076,400	$ 1,236,946,600
Yr. 5	$ 1,678,779,000	$ 52,922,500	$ 1,625,856,500
Yr. 6	$ 2,014,535,000	$ 3,483,600	$ 2,011,051,400
Yr. 7	$ 2,350,290,000	$ 3,328,600	$ 2,346,961,400
Yr. 8	$ 2,686,046,000	$ 2,210,700	$ 2,683,835,300
Yr. 9	$ 3,021,802,000	$ 2,154,000	$ 3,019,648,000
Yr. 10	$ 3,357,558,000	$ 2,218,700	$ 3,355,339,300
Total	**$ 18,466,568,000**	**$ 338,797,600**	**$ 18,127,770,400**
NPV	**$ 12,806,882,000**	**$ 281,253,000**	**$ 12,525,629,000**
Return to the City of Cape Coral for Each $1 spent			**$ 45**

Strategic Timeline

The Strategic Timeline indicates the implementation schedule for the Action items. It is assumed that each initiative would have varying mobilization lag (pink bars), a 6-month kick-off period (red bar), a distinct project work phase (orange bar), and important project review milestone(s) dates (yellow crosses). We recommend that Critically Important Action items be undertaken first.

Critically Important Action Items

Priority	Initiative
Lev1	Public Visioning Sessions for Cape Coral's Growth
Lev1	Committee of the Whole Public Access Website
Lev1	Citizen Advisory Committee for Public Input on Major Projects
Lev1	Benefit/Cost Analysis for Future Projects
Lev1	Independent Economic Development Website
Lev1	Economic Impact analyses for all Capital Expense Projects
Lev1	Consumer Spending Potential Reports
Lev1	Explore Opportunities to Work with Short-Term Rental Providers
Lev1	Consider A Co-Op Marketing Approach with Certain Attractions
Lev2	Working Group for Each Target Industry Cluster
Lev2	Compelling Narrative and Tagline about Cape Coral
Lev2	4-Quadrants Commission on Neighborhood Identity and Wayfinding
Lev2	Opportunity Multiplex Program
Lev2	One-Stop-Shop for Business Development
Lev2	Streamline the Permitting Process
Lev2	Cape Coral Executive Corps
Lev2	Target Industry Prospectuses
Lev2	Expansion of Online Learning Opportunities
Lev2	Pop-Up Retail Fairs
Lev2	Enhance & Develop New Visitor-Focused Events
Lev2	Support More Unique Local Dining Options & Enhanced Evening Activities
Lev2	Encourage Cross-Promotion and Joint Packaging Among Related Attractions
Lev2	Tourism Leadership & Collaboration / Partnerships
Lev2	Designate To Be Responsible for Tourism
Lev3	On Demand Water Mobility Transportation System
Lev3	Cape Coral Land Bank
Lev3	Strategic Site Assemblage Tax Credit
Lev3	Low Impact Storm Water Infrastructure Program
Lev3	Cape Coral FloodWatch Program
Lev3	Cape Blue Incentive
Lev3	OEBD Elevation to Full Department Status
Lev3	Target Industry Job Creation Grant
Lev3	Cape Coral Startup Support Center
Lev3	Further Develop Youth, Adult & Scholastic Sports Facilities



Lev1 Level 1 (high priority)

Lev2 Level 2 (modertae priority)

Lev3 Level 3 (low priorty)

Legend

- Project mobilization (lag)
- Project Kick-Off
- Project Workphase
- Progress Review Milestone

Non-Immediate Action Items											
Priority	Initiative	Yr.1	Yr. 2	Yr. 3	Yr. 4	Yr. 5	Yr. 6	Yr. 7	Yr. 8	Yr. 9	Yr. 10
NILR	Cape Coral Eco-Newsletter and Blog										
NILR	Further Develop the Already Existing Family Activity Cluster										
NIMR	Events that Celebrate Both Big City and Small-Town Living										
NIMR	Solar Community Cooperative Task Force										
NIMR	Accredited Economic Development Organization Status										
NIMR	Vocational Training Silos for the Trades										
NIMR	Industry Familiarization Tours										
NIMR	Increase Activity and Access to Cape Coral's Waterfront										
NIMR	Promote Experiential Tourism Product by Expanding Outdoor Activities										
NIMR	Energize & Educate Locals About Tourism In Cape Coral										
NIMR	Engage Higher Education Institutions as A Catalyst										
NIMR	Cape Coral's IT Infrastructure Promotion										
NIHR	"Call to Arts" Program										
NIHR	Cape Coral Executive Airport										
NIHR	Cape Coral Corporate Park										
NIHR	Downtown Civic Center & Entertainment District										

NIHR Non-immediate Need (high resource demand)
NIMR Non-immediate Need (moderate resource demand)
NILR Non-immediate Need (low resource demand)

Marketing Strategies

Marketing to prospective target industries and cluster companies is a lengthy process and will require funding and coordination beyond the strategic recommendations outlined hereto. But, the message that Cape Coral is on the move forward can be brought to the market's attention.

Visioning

Initiative 1.a.1 suggests that semi-annual visioning sessions be on what the City of Cape Coral should aspire to achieve in the future, possible directions for future planning. For now, the Vision statement for the Strategic Plan is this:

"A city evolving from its suburban roots into a new urban paradigm as a self-sustaining network that promotes economic vitality together with lifestyle and cultural excellence."

With continuing public input and City guidance, it is expected that the statement will change over time as well as be accompanied by an updated Mission statement. In Volume 1, the mission is identified as follows:

"Provide the strategic recommendations necessary to ensure that economic growth keeps pace with population growth."

OEBD should lead the Vision and Mission Statements activity and involve local business and government leaders in a series of round tables meetings or net forums to recognize the mutual need for the strategic economic plan (The Course Ahead) and to bring it to fruition.

Branding

Initiative 1.b.1 recommends the retaining of a qualified advertising or media firm to develop a new "brand" and compelling narrative about Cape Coral. As the selected firm develops media and graphics for the new efforts, a principle should be kept in mind. Cape Coral is an evolving marketplace trying to find a new pathway in major urban development. For many traditional marketing programs, this represents untested waters, so innovation and imagination are key. OEBD and the City must guide the branding work towards creating a unique story that will compel business leaders around the nation to focus on the City of Cape Coral for new location potentials.

Public Relations

One of the chief ways to achieve success is through a comprehensive public relations program that would highlight the advantages for business investment in Cape Coral in the relevant national and international media. As part of this strategy, we suggest the retaining of a qualified national public relations firm with expertise in economic development marketing. Among the many functions of a PR engagement, the following are key:

- Develop comprehensive strategic outreach to reach regional, national and international business media with key messages
- Define appropriate media markets based on existing research and information of the City's profile
- Develop and maintain current lists of customized media contacts for television, radio, print, and Internet
- Create a national media kit with current background for spokespersons
- Pitch storylines to major business publications and media to heighten awareness of Cape Coral's emerging business environment
- Secure story placement and raise the quantity and quality of favorable business coverage for the City in regional/national media

Target Industries Outreach

Attraction of interest by company executives in the targeted industry areas may be a long process, requiring several strategic approaches, including direct marketing and mail, print and digital advertising, field missions, trade shows, and media marketing.

Direct Mail Campaigns

In large corporations, "gatekeepers" (secretaries and administrative assistants) seek to protect chief executive officers from streams of unsolicited promotional materials arriving daily. Marketers must find ways to circumvent interceptors to get the CEO's attention. While the traditional primary audience for economic development solicitation had been centralized corporate real estate executives, these departments were largely decimated by cost-cutting in recent years in favor of outsourcing to real estate consultants.

Before launching a direct mail (or e-mail) campaign, an industry-specific prospectus (e.g., Volume 1 documents) should be prepared in both glossy hard copy and electronic format. Next, verified mailing lists should then be obtained from reputable sources (such as Dun & Bradstreet/Hoovers, Standard & Poor's, or Ward's/Gale), requesting their advance estimate of the number of companies and number of contacts in the targeted industries or clusters.

A direct marketing program should extend through a series of steps and frequent follow up to culminate in closing of the deal.

Print & Digital Advertising

Direct mail campaigns may not reach all of the potential prospects in an industry, so Cape Coral should also consider placing space advertisements in pertinent print magazines with digital channels. Such ads will broaden the dissemination of the message and should lead to more prospects in the target clusters.

Costs for advertising in general business publications, however, can be prohibitive. A better way to reach the target audiences may be through ad placements in the technical trade journals widely read by each sector.

Digital ad rates tend to be significantly less expensive than print versions. However, some recent studies have shown that print media often delivers better results in areas like response rates, conversions, and brand recall. In advertising, digital fatigue is a growing issue and organizations that continue to leverage print in their marketing mix will see tangible results that are harder to achieve through digital channels alone.

Field Missions

A field mission draws upon business representatives from a number of identified target sectors which are deemed to hold the greatest mutual promise for new business development within the host community. Field missions help economic development organizations position themselves in markets where competition is fierce. These visits are more about opening doors and developing long-term relationships than trying to make sales or close deals.

To the extent possible, travel to meetings with active prospects in a target industry should be coordinated with calls on other potential candidate firms in the same geographic area (with dates and times confirmed in advance). Since these calls are likely to involve prospects in a broad range of industries, Cape Coral representative(s) must be briefed on key findings of the Strategic Plan report.

Trade Shows

There are thousands of trade shows held every year, and economic development agencies are renting booths in the leading shows. Some of the more important shows for the outreach on Cape Coral include:

- Consumer Electronics Show (CES)
- International Council of Shopping Centers (ICSC)
- MedTrade Expo & Conference
- International Manufacturing Technology Show (IMTS)
- The National Restaurant Association (NRA)
- National Association of Realtors (NAR)

Staffing a booth at trade show may not always be the most effective way of “working” the show. It may be more advantageous to bring a group of “ambassadors” to the show to meet with prospective companies.

Each show will list exhibitors in advance usually with contact information, and a proactive telephone campaign designed to arrange brief visits at the booths of interested parties can produce marketable results.

Other effective ways of attending the show is to sponsor a hospitality suite in the accompanying hotel, and if possible, provide an off-site dinner for a group of invitees at a local restaurant. Many attendees grow tired of the constant activity of the show and especially look forward to quieter meetings and higher food quality. By attracting a smaller but more attendant group, the economic development message is easier to convey.

Radio & Television Media

Both radio and television (broadcast or cable) offer special ways of reaching the target audience, but at differing methods and costs. State and regional economic development budgets allow for national TV advertising, but smaller areas such as Cape Coral would be most likely relegated to public access television or local radio which, unfortunately, cannot serve a broad enough base.

Cape Coral should attempt to be featured on a PBS or National Public Radio broadcast for an outstanding community achievement. It would be particularly significant if the news item focused on technical education advancements, since this is a "hot" button for the target industries. With media produced by the broadcaster, the costs for a "spot" are alleviated, and only duplication and distribution of the recorded media is necessary to have digital format available for marketing use.

Social Media

Economic development agencies use social media to primarily promote their region's business opportunities, showcase local success stories, attract potential investors, engage with the community, and build brand awareness by highlighting the unique features and advantages of their area.

One of the most influential social media channels for business is **LinkedIn**. According to current data, LinkedIn reaches over **1 billion** users across the globe, making it a platform with a massive potential audience for professional networking and B2B marketing.

Articles and posts written by guest authors that feature current or planned developments in Cape Coral can have far-reaching impacts. Placement of these publications in membership groups in LinkedIn oriented toward the targeted industry clusters can expand the network and reach the key decision-makers who will begin to take more notice of Cape Coral's potential for their business.

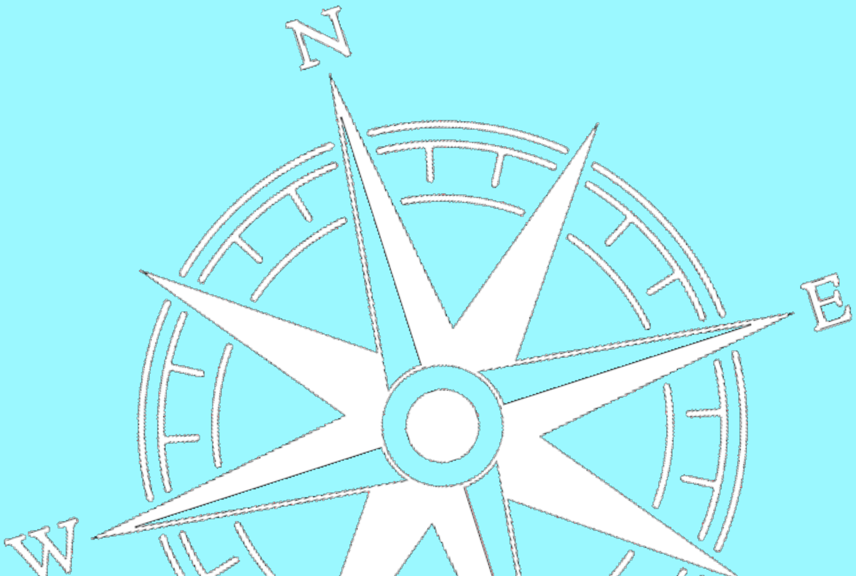
Familiarization Tours

A familiarization tour, also known as a FAM tour, is a trip that industry professionals a first-hand experience of a destination. FAM tours should be conducted for each cluster with special events and hospitality services prepared to highlight the industry. Travel reimbursements should be arranged to provide adequate visitor experiences for the events. While many projects and recommendations developed in this study will not yet be realized, the City can provide marketing materials that will illustrate the new directions that the City is headed and how attraction of corporate interest would be accommodated.

Initiative 4.c.4 recommends that the OEBD conduct FAM tours for executives of leading companies and corporate site selectors. The object of these tours is the showcasing of Cape Coral's potential. We suggest that the OEBD initially identify the top **3** industry clusters with the greatest interest by the City and focus these tours in those areas only. The FAM tours should have a theme oriented toward each cluster visit, with site packages and follow-up materials specifically designed to reinforce the cluster's fit for Cape Coral.

Marketing Conclusions

Marketing to prospective target industries and cluster companies is a lengthy process. It will need dedicated funding and coordination. A constant messaging is required that Cape Coral is on the move forward. The goal is effectively and successfully bringing Cape Coral to the market's attention.



SETTING WAYPOINTS

CAPE CORAL ECONOMIC DEVELOPMENT STRATEGIC PLAN

Volume 1 – Competitiveness & Opportunity

DCG Corplan

PARTER International, Inc.

FORGEY PLANNING

D-H&Assoc

December 2024

Acknowledgements

The Cape Coral Economic Development Strategic Plan is a comprehensive roadmap for achieving success in a uniquely challenging environment. Creation of the Strategy is not accomplished in a vacuum – there are many people and organizations that have provided valuable input to the process.

Our project team has been guided by the dedicated leadership of the Office of Economic and Business Development, the City Manager's Office, Development Services, Public Works, Communications, Information Technology Services, the Chamber of Commerce, the Lee County Visitor and Convention Bureau, and more.

We would like to thank Mayor Gunter, the City Council, and the especially the residents and businesses of Cape Coral, without whose unbiased and informative opinions and recommendations this work would not be possible.

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Photo credit: The Westin Cape Coral Resort at Marina Village

Volume 1 – Competitiveness & Opportunity

Key Findings

The intent of this study is to prepare an Economic Development Strategic Plan which contains goals, objectives, implementation plans, and metrics. It is intended to identify the strengths of the City of Cape Coral and determine a means of leveraging those advantages to spur economic growth.

The objective of Volume 1 is to present the foundational characteristics of the City of Cape Coral from a competitiveness and opportunity viewpoint. The main goal is to understand the complexities of this large community, its advantages and drawbacks, and its potential for sustainable growth into the future.

While the Vision is more clearly articulated in Volume 2 – Strategy, the Mission of this part of the study is clearly defined:

Provide the strategic recommendations necessary to ensure that economic growth keeps pace with population growth.

Cape Coral is the 8th largest city by population and the 3rd largest by land mass in Florida. With a population of more than 217,000 residents, the City is experiencing high growth. As a pre-platted community, Cape Coral could have more than 375,000 residents at buildout.

ECONOGRAPHICS

- There are **6** Florida cities identified as direct competitors to Cape Coral:
  - Fort Lauderdale
  - Orlando
  - Palm Bay
  - Pompano Beach
  - Port St. Lucie
  - West Palm Beach
- Cape Coral's **34.6%** growth places it **2nd** among the competing cities.
- English spoken at home is an indicator of the impact of immigration and attitudes toward education within the household. In this comparison, Cape Coral ranks **2nd**.
- Household size equates to possible worker availability, as median incomes offer strength for retail buying power. In these two groups, Cape Coral's **2.67** average household size and **$76,991** median household income ranks **3rd** in each case.
- Advanced educational attainment results in increased skills and higher salaries. In the categories of Associates Certificates, Bachelors' degrees, and Graduate degrees, Cape Coral ranks **2nd**, **5th**, and **6th**, respectively.
- Higher home ownership rate denotes economic stability, whereas lower housing prices suggests affordability. In these categories, Cape Coral's **75.9%** home ownership rate and **$379,600** median home value ranks the City at **3rd** and **4th** places, respectively.
- Reasonability on the Cost of Living index indicates stable economic performance. Cape Coral ranks **3rd** in this category.

- To determine the quality of life, three categories are examined: crime, healthcare, and culture. The Crime index, the Number of Physicians per 1,000 population, and the Arts, Tourism and Hospitality employment per 1,000 population are compared to the State of Florida's average to generate indices. In these three groups, Cape Coral ranks **3rd**, **4th**, and **4th**, respectively.

- Stable economies have a good balance of goods-producing and service-producing industries. The four goods-producing industries in the U.S. are (1) forestry, hunting and agriculture support; (2) mining; (3) construction; and (4) manufacturing. A ratio is produced through the division of goods-producing industry employment and service-producing industry employment. In this category, Cape Coal ranks in **3rd** place.

- Increasingly sophisticated business operations require a higher percentage of technically trained skilled workers at reasonable salary levels. In goods-producing industries, Cape Coral ranks **5th**; for service-producing industries the City's rank is **1st** place.

- Comparative land prices for commercial (non-residential) and industrial sites indicate valuation fluctuations per market. Cape Coral ranks **3rd** in lower land costs.

- Operating profits are significantly affected by the variation in electric power costs. Individually negotiated rates may be possible, however, published rates are utilized for the comparison. For commercial power rates, Cape Coral ranks in **1st** place; for industrial rates, the City is in **2nd** place.

- Successful development often hinges on the potential to provide an intercept location for workers traveling long commutes. Commutation outside of place of residence or having 2 or more vehicles available are indicators of relative mobility for employees. In these two categories, Cape Coral ranks **4th** and **1st**, respectively.

- As a second measure of worker mobility, the daily travel time workers exhibit reinforces the intercept location potential. Cape Coral **leads** all others in this metric.

PUBLIC & EMPLOYER INTERVIEWS & SURVEYS

Resident input was sought through use of online surveys. A Public Survey was conducted in September 2023, and an Employer Survey in May, 2024. The response rate was varied, with **1,841** for the Public and **162** for the Employer surveys.

- Public response was generally ***unfavorable*** towards effectiveness of local government in addressing community concerns, citing lack of clear planning vision, desire to reduce costs, and improve visual appeal of the City.

- Employer responses centered on regulatory approvals improvement, government transparency, and business costs control.

Two business meeting "roundtables" were held, oriented at bringing more awareness of available governmental assistance to the business community. The meetings were organized "Goods-Producing" and "Services-Producing" sectors. The events occurred in April 2024 at the two Cape Coral libraries.

- Focus group discussions emphasized the need to adapt to demographic changes and evolving work trends with supportive infrastructures, such as enhanced business environments, improved training facilities, and streamlined governmental processes.

- There is a strong call for a community-driven approach to foster a conducive environment for both current residents and future economic prospects.

Tourism interviews were conducted in June 2024. A discussion guide was utilized for each of the interviews to provide a common basis for the conversation, though each interviewee was encouraged to expound on their areas of interest and expertise.

Some key takeaways from the interviews indicated that Cape Coral is situated to unlock its improved tourism driven economic potential. This is the opportune time for the City to take full advantage of its location, available land, resources, and human capital to advance the economic vitality of the City. To achieve this, it will need to move forward on several fronts:

- Build upon the City assets to enhance existing tourism products and attract new ones.
- Invest in smart infrastructure resources to support tourism related growth.
- Strengthen collaboration with private sector, public/private sector organizations, and other governments to advance tourism.
- Put plans into action, monitor progress, and adjust as needed.
- Attract more businesses that continue to contribute to the quality of life.

SWOT ANALYSIS

A SWOT analysis was generated as a strategic planning tool to help the City evaluate its strengths, weaknesses, opportunities, and threats.

- *Strengths* summary findings:
    - Dynamic growth
    - Civic engagement
    - Quality if place

- *Weaknesses* summary findings:
    - Environmental risk
    - Physical reality
    - Economic limitations

- *Opportunities* summary findings:
    - Environmental resiliency
    - Innovative development
    - Economic expansion

- *Threats* summary findings:
  - Market timing & economy
  - Competition
  - Image

A SWOT matrix was developed that compares internal values of Strengths (S) and Weaknesses (W) against the two external drivers of Opportunities (O) and Threats (T).

- Opportunities that capitalize on Strengths:
  - Evaluate means of balancing housing growth with expansion in jobs and non-residential tax revenue production.
  - Establish a public forum or outreach method that educates the public on environmental sustainability programs that are achievable and practical.
  - Establish a public forum or outreach method to discuss innovative approaches to land use that primarily serve the community.
  - Design and encourage dual-use environmental programs such as bioretention of stormwater that are both aesthetically pleasing but also functional.
  - Develop new land use guidelines that promote innovative ideas that capitalize on Cape Coral's unique character, such as canal use.

- Overcome Weaknesses to pursue Opportunities:
  - Evaluate and select resiliency solutions that can address short- and long-term impacts by major weather events.
  - Establish guidelines for new development projects that are sustainable to wind and flood impacts and that can provide dual-purpose functionality, such as a civic center serving as a hurricane shelter.
  - Recruit and pursue new business attraction that is not restricted to operate in high natural hazard areas, such as certain insurance companies.
  - Identify Cape Coral's realistic opportunity for new business attraction by evaluating industries' requirements for air, highway, water, and rail transportation services.

- <u>Reduce vulnerability to external Threats:</u>
  - Evaluate patterns of new population growth and entitle development of support retail and services to match growth.
  - Engage public support for new investments by demonstrating benefits to be derived locally.
  - Create a public outreach to determine what retail or services categories are available in competing markets but not in Cape Coral.
  - Engage the public for a series of visioning sessions to identify what type of city that Cape Coral is attempting to become.
  - Create a public outreach to determine what retail or services categories are available in competing markets but not in Cape Coral.
  - Utilize the best assets of Cape Coral, including new strategic approaches, to promote a new image for the city in marketing efforts.

- <u>Prevent Weaknesses from being susceptible to external Threats:</u>
  - Making informed investment decisions based on statistical probabilities of severe weather events.
  - Ascertain that media coverage of pre- and post-weather events are balanced and reinforce mitigation and recovery efforts.
  - "Best practices" review of competing areas' overcoming of physical limitations in marketing efforts.
  - Unbiased self-examination by leadership of Cape Coral's assets, drawbacks, and drivers for promotion.
  - Corrective measures to be taken to reinforce workforce performance and economic development initiatives for long-term change.
  - Awareness of the influence of competing cities for new business attraction and formulation of a plan to make substantive changes where possible to alter Cape Coral's limitations.

EMPLOYMENT TRENDS

In 2022, Cape Coral Business Employment was identified at **42,460** persons within **6,351** active businesses. Data for this conclusion was extrapolated from the US Census and ESRI. The five leading categories that accounted for **57%** of employment were:

- Retail Trade (**6,477** jobs)
- Healthcare & Social Assistance (**5,226** jobs)
- Accommodation & Food Services (**5,033** jobs)
- Construction (**3,974** jobs)
- Educational services (**3,489**)

The **5** leading major occupational categories for the 42,460 employment represent **20,489** jobs or **48%** of the total local employment:

- Sales and related (**11.5%**)
- Office and administrative support (**11.3%**)
- Food preparation and serving related (**11.1%**)
- Transportation and material moving (**7.2%**)
- Management (**7.2%**)

The 2022 Civilian Labor force estimate for the City of Cape Coral was **102,700** persons employed in **24** categories of occupations as defined by the Census. The **5** leading occupational groups accounted for nearly **half** of Cape Coral workers:

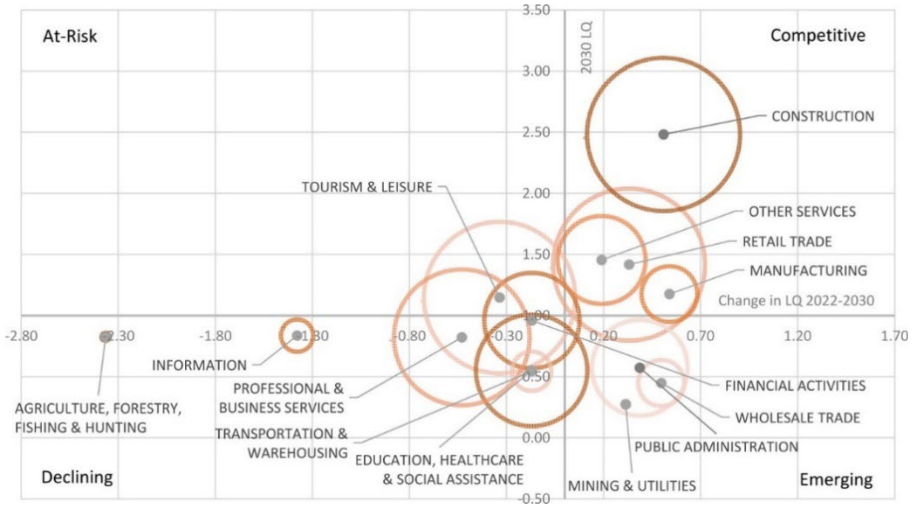
- Sales and related (**13.0%**)
- Office and administrative support (**11.8%**)
- Management (**10.2%)**
- Food preparation and serving related (**6.9%**)
- Health diagnosing, treating pract. & other technical (**6.8%)**

By weighted averaging of Census Journey to Work statistics, **56.5%** of the Resident Labor Force, or nearly **58,000** workers are leaving Cape Coral daily to work elsewhere. Capture of a significant share of those workers must become a priority for the City going forward.

TARGET INDUSTRY ANALYSIS

The potential for economic advancement for the City of Cape Coral is evaluated by examination of the targeted industries for the area. The methodology for this analysis is the Location Quotients (*LQ*) tabular and charting technique. In this method, industry employment is plotted for the projected 2022-2030 period using Lee County and the State of Florida Long-Term Industry Employment projections. Increases in employment are generally considered as the truest indicator of business growth, revenue gains and profitability. The analysis forecasts those industries that are present in Cape Coral and that demonstrate growth opportunity or are of such legacy value that continuing efforts for sustainability are paramount.

The major industrial sectors present in Cape Coral are illustrated in the LQ chart. Each quadrant is labeled as follows: *Competitive* – dominant industries in the Region; *Emerging* – emerging industries not yet achieving critical mass; *At-Risk* – formerly strong industries (legacy) that are losing power and influence; or, *Declining* – industries that may be in danger of non-sustainability in the Region. The location of the employment "bubbles" on the chart demonstrates the industries' role for the local economy. Year 2022 employment of **42,460** is expected to grow by **4,234** jobs by 2030, totaling **46,694** positions.



Through a rigorous process, preliminary targets are developed through the following criteria:

- Industries that do not require support. Recruitment and attraction of companies in this area should continue to be encouraged.
- Industries that require economic development efforts to bring employment to a rate comparable to that of the State of Florida's.
- Industries that have no reported employment and are considered "missing" and therefore the establishment of the industry by new jobs.

The outcome is the identification of **65** 4-digit NAICS industries for Cape Coral in **11** major industry sectors. These industries represent the areas where the City should focus its marketing efforts as new opportunities for economic growth and expansion. In total, these industries represent a potential employment gain of **13,640** new jobs.

By way of a "cluster mapping" technique, **8** industries "clusters" emerge as targets for Cape Coral:

- Business & Financial Services (**3,675** jobs)
- Community Services (**3,927** jobs)
- Consumer Products & Services (**1,430** jobs)
- Culinary Tourism (**123** jobs)
- Healthcare & Life Sciences (**3,087** jobs)
- Industrial Services (**256** jobs)
- IT & Media (**770** jobs)
- Sustainable Real Estate (**372** jobs)

The 13,640 forecasted total employment for the 8 targeted industry clusters will produce a total of **15,162** new jobs (direct, indirect, and induced) and an annual total economic impact of **$3.358 billion**.

REAL ESTATE, LAND USE & INFRASTRUCTURE

The City of Cape Coral's **119.4** square mile area is catalogued by **127,830** individual property records totaling **57,213** acres not including canals and roadways. Utilizing Lee County's

Property Appraiser records, there are total of **1,575** non-residential improved properties in **38** categories of building use.

The Commercial sector is segmented into Financial, Food Service, Lodging, Mixed Use, Offices, Recreation, Retail, and Service categories. In total, there are **1,032** buildings containing **10,469,780** sf, with an average age of **31.5** years. In the past ten years, **1,053,921** sf of inventory has been added, or a gain of **10.1** percent.

The Industrial sector is segmented into: Light manufacturing; Cannery, brewery, winery; Mineral processing; and, Warehousing, distribution terminals categories. In total, there are **332** buildings containing **4,970,503** sf, with an average age of **27.8** years. In the past ten years, **961,909** sf of inventory has been added, or a gain of **19.4** percent.

The Institutional sector is segmented into: Churches, Temples; Private schools & and colleges; Privately owned hospitals; Mortuary, Cemetery, Crematorium; and, Clubs, Lodges, Union Halls. In total, there are **87** buildings containing **1,227,137** sf, with an average age of **38.2** years. In the past ten years, **189,668** sf of inventory has been added, or a gain of **15.5** percent.

The Government sector is segmented into: Public County schools; Hospitals; Lee County - Other, State of Florida - Other; US Gov't – Other; and, City of Cape Coral - Other. In total, there are **108** buildings containing **4,964,644** sf, with an average age of **32.7** years. In the past ten years, **100,34**7 sf of inventory has been added, or a gain of **2.0** percent.

The Miscellaneous sector contains Utilities as the sole component. There are **16** buildings totaling **32,211** sf with an age of **28.3** yrs. In the past 10 years, no new construction has been added to the inventory, making this an inactive element. Existing construction has primarily occurred south of Pine Island Rd. on various roadways. The average building size is **2,013** sf.

In total, the 1,575 buildings account for **21,664,775** square feet of floor space. The building stock is largely older in nature, with a weighted average of **30.1** years occurring. In the past ten years, **4,367,796** sf of new space has between added to the inventory, or a gain of only

20.2 percent. Inventory growth has been witnessed in only **half** (19) of the 38 categories. Inventory gains have been led primarily by the top five categories, totaling **3,566,051** sf or **81.6%** of total new space:

- Stores, one story – **1,244,050** sf (**28.5%**)
- Community shopping centers -- **976,568** sf (**22.4%**)
- Warehousing, distribution terminals -- **899,690** sf (**20.6%**)
- Professional buildings -- **253,765** sf (**5.8%**)
- Supermarkets – **191,978** sf (**4.4%**)

Cape Coral's two Opportunity Zones (OZ) cover approximately **5,454** acres or **8.5** square miles, with a total of **17,371** parcels, **6,546** of which are vacant (**37%**). The City of Cape Coral owns **75** of the vacant parcels in OZ's, set aside for future use as well or other public assets, leaving a total of **6,471** parcels or **1,962** acres of vacant land in private ownership.

Due to the large number of vacant parcels and the usefulness of Opportunity Zones to stimulate economic development, there is a potential to satisfy the need for affordable housing though judicious land use efforts that can benefit from existing legislation.

Bisecting the OZ's is the Pine Island Road corridor. Development along this roadway is continuing at a brisk pace. The area is acknowledged as the shopping district for Cape Coral and is the primary focus of developers. Currently, there are about **85** projects in varying levels of development approval in the corridor.

The four major intersections of Pine Island Road with Del Prado Blvd., Santa Barbara Blvd. Chiquita Blvd., and Burnt Store Rd. represent traditional four-corner commercial opportunities for inter-related activities of shopping, banking, dining, mailing or shipping, and more from a centralized location. The density of existing businesses within a 10-minute walk of each intersection decreases from east to west:

- **188** businesses - Del Prado Blvd.
- **149** businesses - Santa Barbara Blvd.
- **109** businesses - Chiquita Blvd.
- **4** businesses - Burnt Store Rd.

In total, there are **450** businesses within the four 10-minute walk zones at each intersection. Using the median value of **129** businesses, both Del Prado and Santa Barbara are above the median density value, but both Chiquita and Burnt Store are below. Consequently, there should be efforts to promote at least **20** more businesses at Chquita Blvd., and **125** new businesses in the area of the Burnt Store Rd. intersection.

Infrastructure

The City of Cape Coral Information Technology Plan 2023 recommends expansion of the City's fiber ring to additional City assets. Primarily, those assets include:

- Parks
- Fire Stations
- Utilities
- Wells
- Master pumping stations

To meet the cabling goal, approximately **142** miles of fiber optic is being installed. According to the City's Information Technology Services (ITS) Dept. approximately **40%-50%** of the objective has been met. ITS suggests that a potential of **120** miles of dark fiber cable may be in excess. A potential could exist for leasing of unused cable capacity to commercial enterprises in the area.

The City of Cape Coral has also embarked on a smart city infrastructure through the innovations shown below:

- Surveillance cameras
- Public Wi-fi
- Informational kiosks
- License plate reader

An opportunity may exist for the City's Utilities and Public Works departments to implement Real-time IoT sensors that monitor street flooding and other resiliency information that can be integrated with Cape Coral's 3-1-1 network. While the City of Cape Coral is in the process of seeking alternative electric power options, a potential benefit may be gained from mass solar generation and storage. Commonly occurring power disruptions from weather events can be partially alleviated for critical use facilities simply through adequate solar generation management.

Given Cape Coral's unique location and degree of canal development, a particular emphasis is needed relative to storms and weather events. As Cape Coral continues to grow in population and impervious surface area, stormwater management will also increase in its demands on City services.

Perhaps an alternative course of action can be achieved through Low Impact Development (LID). LID is a management approach that can reduce runoff and pollutant loadings as close to its source as possible. LID includes overall site design approaches and individual small-scale stormwater management practices. These practices promote use of natural systems for infiltration, evapotranspiration, and harvesting and reuse of rainwater.

Transportation

Bus service in Cape Coral is provided by LeeTran as the City does not operate its own bus system. The bus lines serve the Southeast and Northeast Cape areas but the Southwest and Northwest neighborhoods are devoid of bus service. Future population growth is anticipated in these unserved areas and residents as well as seasonal visitors have no mass transit opportunities to utilize.

Microtransit might be able to meet coverage goals in areas that cannot support regular service in those areas not connected to fixed route systems at transit hubs. It could also serve as a tool to evaluate demand for expanded fixed route service hours or coverage.

In consideration of Cape Coral's extensive road and canal network, a serious examination of the potential of both land- and water-oriented micro transit systems should be evaluated.

WORKFORCE READINESS

Arising from Employer Survey (discussed earlier), polling indicated that **35%** of employers felt that minor job training was needed for new hires. Most business owners (**53%**) felt that government-sponsored training might be of some possible value to their business. And, **56%** felt that hiring skilled workers was the most prevalent challenge. However, only **16%** remarked that subsidized training was needed.

To identify job training requirements, a process has been developed where each 4-digit NAICS industry within the targeted clusters have the requisite occupations as provided by the Bureau of Labor Statistics (BLS) listed in descending order of occurrence in each industry. In total, the jobs shortfall for Cape Coral in the target clusters is **1,718** positions.

- The **1,718**-job shortfall for the Cape Coral target clusters covers **202** occupations with varying educational needs for entry, work experience in related occupation, and on-the-job training requirements. The top **20**-ranked fields cover **1,083** jobs or **64%** of the total shortfall.

- In the Cape Coral-Fort Myers MSA, there are **131** occupations in the shortfall list that are not accounted for, which is a total of **657** jobs. These missing figures represent **38%** of the job total and **65%** of the occupations. As educational attainment is the primary qualifier for these positions, the following summarizes the four levels of college attainment impacts:
    - The highest requirement of Doctoral or professional degree and ranked by numbers of missing jobs. For this category, **84** jobs in **17** occupations are missing from the MSA.
    - For the 2nd level requirements of Master's degrees, there are **10** occupations totaling **31** jobs that are unavailable.
    - For the 3rd level requirements of Bachelor's degrees, there are **28** occupations totaling **126** jobs that need filling.

- In the 4th level requirements of Associates' degrees, there are **10** occupations totaling **35** jobs that are not fillable.

The observable result of this evaluation is that the MSA and likely Cape Coral in particular are weak in the depth of professional and technical personnel available to be utilized by the target industries and clusters.

Through a comparison of the fastest-growing occupations against the target clusters shortfall jobs, **13** matches in occur in the following occupational groups:

- Healthcare Practitioner and Technical
- Life, Physical, and Social Sciences
- Transportation and Material Moving
- Healthcare Support
- Business and Financial
- Construction and Extraction
- Community and Social Services
- Computer and Mathematical
- Educational Instruction and Library
- Installation, Maintenance, and Repair
- Management
- Food Preparation and Serving
- Personal Care and Service

Conversely, there are **6** occupational groups that do not match the fastest-growing categories:

- Protective Service
- Office and Administrative Support
- Architecture and Engineering
- Legal
- Arts, Design, Entertainment, Sports, and Media
- Farming, Fishing and Forestry

Higher Education

From this analysis, it can be concluded that higher educational institutions are likely to be aware of the fastest-growing occupations and training is being adequately addressed in these areas. For the areas of mismatch, however, curriculum adjustments may not be that simple.

The forecasted shortfall of jobs in matched categories could be met by examination of current programs/majors and adding courses as necessary to fulfill these job growth requirements. It would be prudent to encourage the OEBD to share the shortfall list of 1,718 jobs in 202 occupations with the area's schools so that this correction be undertaken.

Colleges within fifty miles of Cape Coral granted **12,891** degrees in 2022. The **5** leading fields of study were as follows:

1. Liberal Arts and Sciences, General Studies and Humanities
2. Health Professions and Related Programs
3. Business, Management, Marketing, and Related Support Services
4. Health Professions and Related Programs
5. Education

For the areas of mismatch, it is apparent that adequate attention needs to be applied in the areas of architecture / engineering, legal, and visual/performing arts.

For Architecture and Engineering, the most sought-after degree is the Bachelor's degree. In Legal, it is the Doctoral or Professional. And, in Arts, Design, Entertainment, Sports and Media, it is again the Bachelor's degree. These 4 year-plus educational commitments might suggest the need for new university or college in Cape Coral. While this is a noble undertaking, it may not be necessary as online learning has become universally accepted over brick-and-mortar requirements.

The City should be aware of the shortfall jobs forecasted in this study can be addressed by active promotion regionally and nationally. A concerted effort should be made to seek professionals and specialists to consider Cape Coral as a new place to live, work and recreate. Attracting professional talent to a city is essential for economic growth and community vibrancy.

PROJECT BACKGROUND

Introduction

Cape Coral is the 8th largest city by population and the 3rd largest by land mass in Florida. With a population of more than 217,000 residents, the City is experiencing high growth. As a pre-platted community, Cape Coral could have more than 375,000 residents at buildout.

The intent of this study is to prepare an Economic Development Strategic Plan which contains goals, objectives, implementation plans, and metrics. It is intended to identify the strengths of the City of Cape Coral and determine a means of leveraging those advantages to spur economic growth.

Cooperative Efforts

To be able to develop the frameworks for strategic goals and initiatives, a great deal of initial research was required. This entailed multiple discussions with project leaders of the various departments of the City of Cape Coral, community leaders and stakeholders, and numerous business representatives.

Project Review Committee

Members of the Review Committee who guided the plan are as follows:

- T. Sharon Woodberry, Economic Development Manager
- Matt Grambow, Special Projects Coordinator – City Manager's Office
- Laura Dodd, Principal Transportation Planner – Public Works
- Chad Boyko, Principal Planner – Development Services – Public Works
- Amy Yearsley, City Planning Manager – Development Services
- Bill Corbett, Design and Construction Manager - Capital Projects
- Melissa Mickey, Communications Manager - City Manager's Office
- Pamela Johnson, Deputy Director, Lee County Visitor & Convention Bureau
- Andreana Petersen - Business Recruitment/Retention Specialist
- Ashley Anderson - Business Recruitment/Retention Specialist

Stakeholders

Identified stakeholders who contributed invaluable input are as follows:

- James Sommers, RE/Max - Realtor, Residential
- Joseph Bonara, Catalyst Development - RE Developer
- Charles Pease, Cape Coral Technical College - Educator
- Annette Barbaccia, Miloff Aubuchon Realty Group - Realtor, Commercial
- Donna Shuman Germain, Cape Coral Chamber of Commerce - Business Leader
- Henrik Margard, Nor-Tech Boats - Manufacturer
- Larry Nygard, Crown Development - RE Developer

Business and Civic Interviewees

Business and civic leaders who provided additional information include:

- Jeremy Vincent – Jungle Bird and Front Porch Social
- Katie Locklin – Parks & Recreation, Program Supervisor
- JoAnn Elardo – Wicked Dolphin Rum Distillery
- Jeff Mielke - Lee County Sports Development
  Steve Geiger – General Manager Safe Harbor Marina
- Gary Aubachon – Local Developer building Slipaway, a Food Truck/ Marina destination
- Michael Ilcyzyszn – Cape Coral City Manager
- Bill Steinke – City Council Member & TDC Board (Ex-Officio)
- Barry Kadel – General Manager Westin Hotel

Project Objectives

The objective of Volume 1 of this study is to present the foundational characteristics of the City of Cape Coral from a competitiveness and opportunity viewpoint. The main goal is to understand the complexities of this large community, its advantages and drawbacks, and its potential for sustainable growth into the future.

While the Vision is more clearly articulated in Volume 2 – Strategy, the Mission of this part of the study is clearly defined:

Provide the strategic recommendations necessary to ensure that economic growth keeps pace with population growth.

Accompanying both volumes of this report is a third document which is the Technical Report. This volume contains the **10** project task reports that were facilitated though the RFP and the project outline. A project website was created to host the 10 sections, plus ancillary sections on project deliverables, presentations, and downloadable data and documentation.

ECONOGRAPHICS

Demographics play an important part in any economic analysis, and DCG Corplan has originated a unique methodology for organizing information into useful topics that provides demographic, economic, and social data for a broad range of categories entitled Econographics. In most instances, the 2022 US Census data projected from the one-year average of the American Community Survey (ACS) have been employed. Additionally, some non-Census business data from has been drawn from a respected commercial source, ESRI.

Competing Locations

The goal of this section is the determination of which Florida cities are Cape Coral's true competition, not just Fort Myers or another Southwest Florida community. To accomplish this evaluation, a review of **22** municipalities in Florida with a population of 100,000 or more is shown in Exhibit 1 (next page), with Cape Coral occupying the eighth in size. As a means of equating relative size, population differential of cities were screened that were in the range of less than twice the size or more than half that of Cape Coral. The list narrowed to **20** cities, removing the two mega-populations of Jacksonville and Miami from the comparison. The 2023-2028 projected annual rate of population growth was then screened for each of the cities as compared to the **0.63%** annual rate anticipated for the State of Florida. This produced a final selection of **6** cities as true competitors to Cape Coral:

Florida City	2023 Total Population	2028 Pop. Projection	2023 Pop. Rank	Annual Growth Rate (AGR) 2023-2028	2023 Pop. Diff'l to CC	2023 Pop. Diff'l Range <2.0, >0.5 to CC	2023-2028 AGR > FL AGR	Final Selection
Orlando	323,217	349,511	4	1.58%	1.55	■	■	■
Port St. Lucie	228,377	245,745	6	1.48%	1.10	■	■	■
Cape Coral	207,883	217,479	8	0.91%	1.00	■	■	■
Fort Lauderdale	190,927	197,911	10	0.72%	0.92	■	■	■
Palm Bay	126,199	132,363	16	0.96%	0.61	■	■	■
West Palm Beach	121,007	126,246	17	0.85%	0.58	■	■	■
Pompano Beach	115,767	119,568	20	0.65%	0.56	■	■	■
Florida	**22,381,338**	**23,091,949**		**0.63%**				

Exhibit 1 – Comparison of Florida Cities over 100K in Population

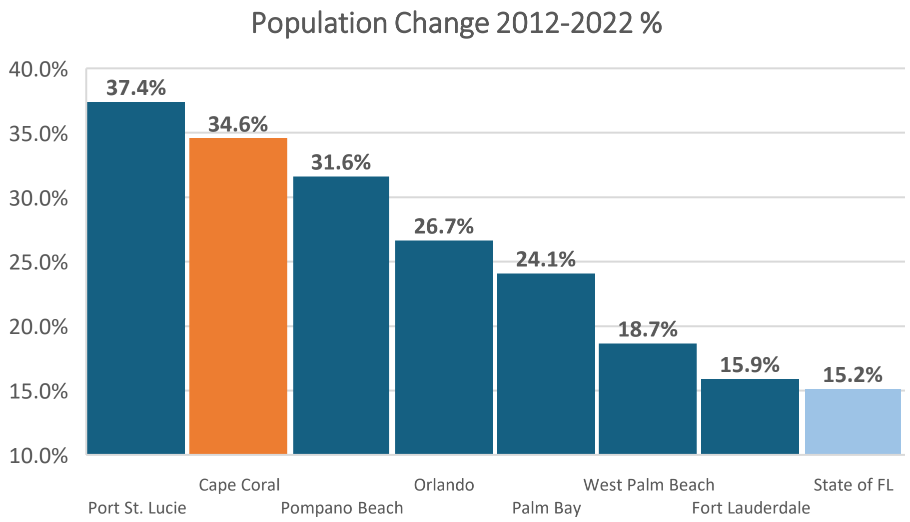
Florida City	2023 Est. Population	2028 Pop. Projection	2023 Pop. Rank	Annual Growth Rate (AGR) 2023-2028	2023 Pop. Differential to Cape Coral	2023 Pop. Differential Range <2.0, >0.5 to Cape Coral	2023-2028 AGR > FL AGR	Final Selection
Jacksonville	986,073	1,013,140	1	0.54%	4.74			
Miami	458,751	492,267	2	1.42%	2.21		■	
Tampa City	396,324	403,325	3	0.35%	1.91	■		
Orlando	323,217	349,511	4	1.58%	1.55	■	■	■
St. Petersburg	261,111	263,958	5	0.22%	1.26	■		
Port St. Lucie	228,377	245,745	6	1.48%	1.10	■	■	■
Hialeah	223,461	227,001	7	0.31%	1.07	■		
Cape Coral	**207,883**	**217,479**	**8**	0.91%	1.00	■	■	■
Tallahassee	199,256	200,895	9	0.16%	0.96	■		
Fort Lauderdale	190,927	197,911	10	0.72%	0.92	■	■	■
Pembroke Pines	172,030	171,334	11	-0.08%	0.83	■		
Hollywood	154,971	159,243	12	0.55%	0.75	■		
Gainesville	142,047	141,710	13	-0.05%	0.68	■		
Miramar	138,215	142,055	14	0.55%	0.66	■		
Coral Springs	134,764	136,291	15	0.23%	0.65	■		
Palm Bay	126,199	132,363	16	0.96%	0.61	■	■	■
West Palm Beach	121,007	126,246	17	0.85%	0.58	■	■	■
Clearwater	118,764	119,936	18	0.20%	0.57	■		
Lakeland	117,606	119,725	19	0.36%	0.57	■		
Pompano Beach	115,767	119,568	20	0.65%	0.56	■	■	■
Miami Gardens	114,252	114,001	21	-0.04%	0.55	■		
Davie	107,089	108,809	22	0.32%	0.52	■		
State of Florida	**22,381,338**	**23,091,949**		**0.63%**				

Demographics

Results for Cape Coral and each competing city are compared to the corresponding State of Florida average or figure. The criteria and methodology have been applied in the **15** categories of demographics investigation.

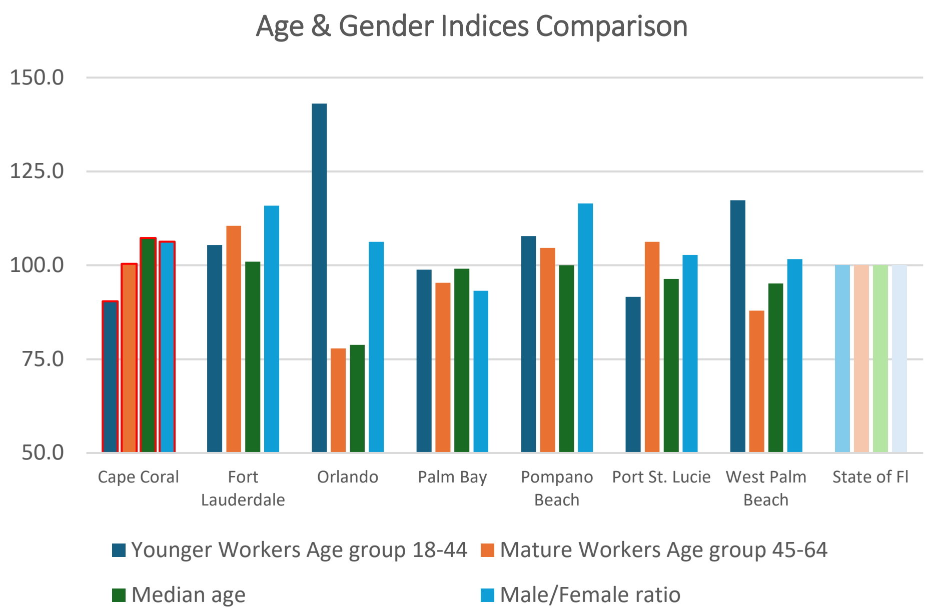
Population Growth

The size of the market area and growth trends determine the potential of an area to support proposed operations. Cape Coral's **34.6%** growth places it **2nd** among the competing cities.



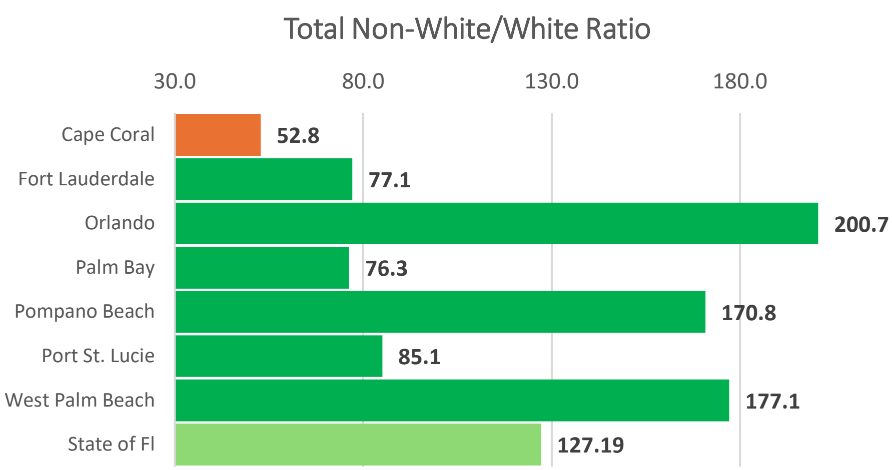
Age and Gender

The key working ages are **18-34** and **35-44**, but the overall working ages to **65** are important. By creating indices relative to the State of Florida as 100.0, a comparison of competing cities can be illustrated. In these categories, Cape Coral ranks **last** for younger workers or lower median age.



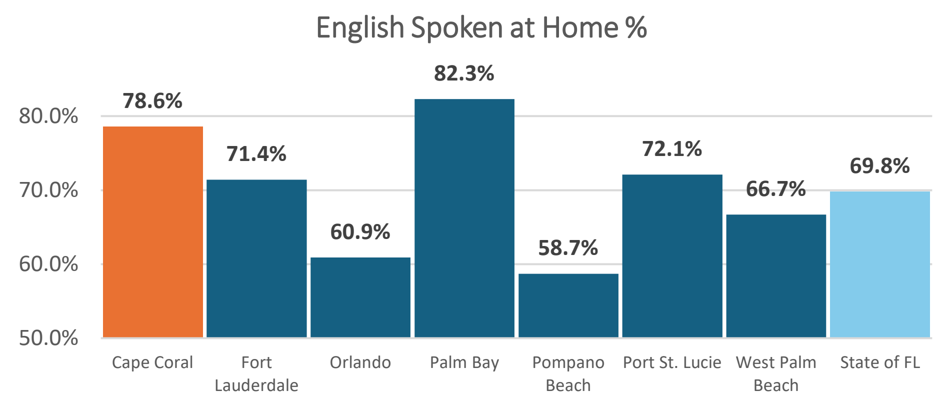
Racial Diversity

Racial diversity in the population base is a desirable attribute for most progressive employers. Cape Coral ranks **last** in this category.



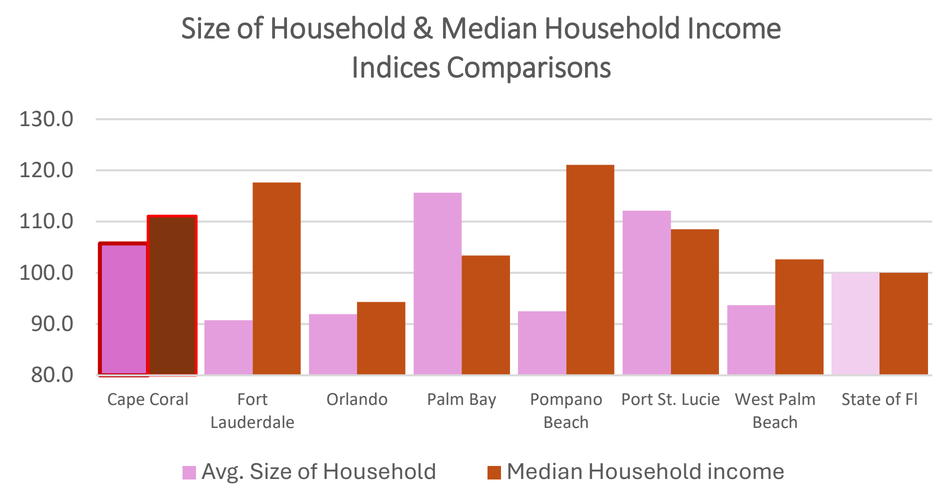
Language Competence

English spoken at home is indicator of the impact of immigration and attitudes toward education within the household. In this comparison, Cape Coral ranks **2nd**.



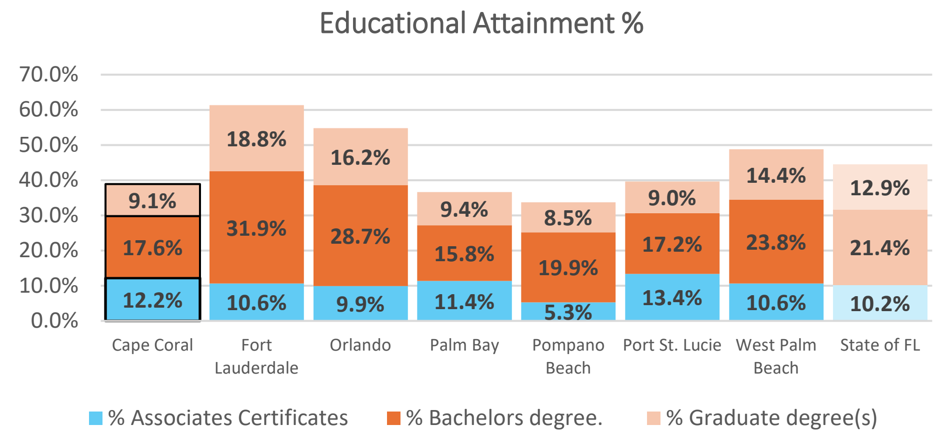
Households & Median Income

Household size equates to possible worker availability, as median incomes offer strength for retail buying power. For the chart, indices are provided that compare each location against the State of Florida. In these two groups, Cape Coral's **2.67** average household size and **$76,991** median household income ranks **3rd** in each case.



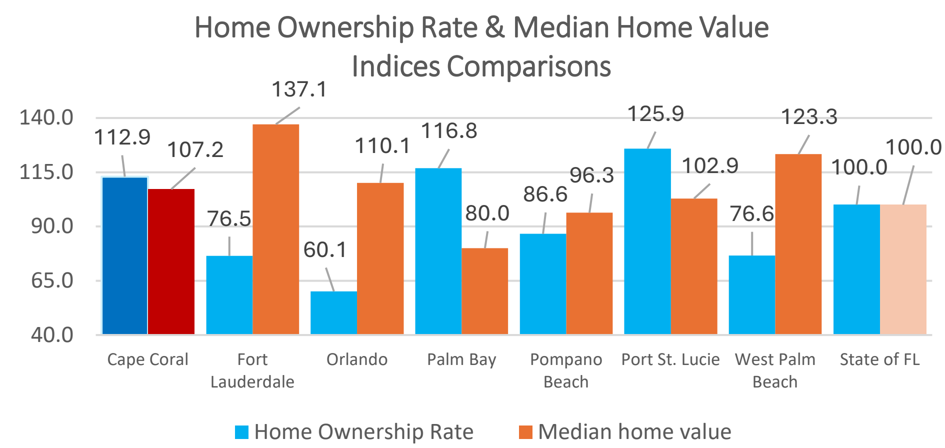
Educational Attainment

Advanced educational attainment results in increased skills and higher salaries. In the categories of Associates Certificates, Bachelors' degrees, and Graduate degrees, Cape Coral ranks **2nd**, **5th**, and **6th**, respectively.



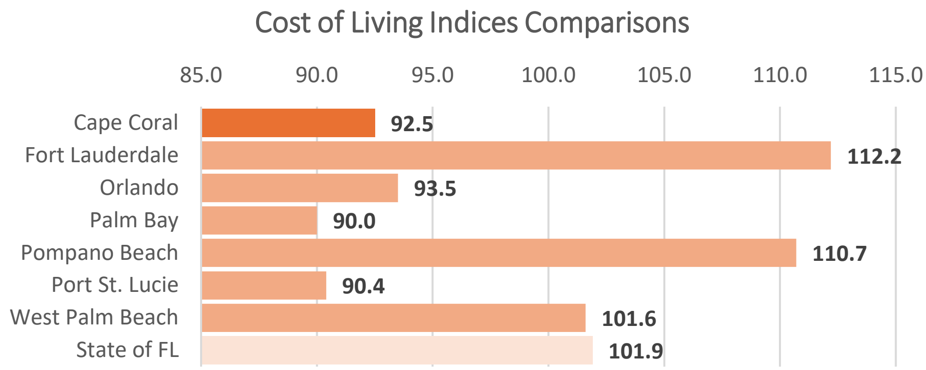
Housing

Higher home ownership rate denotes economic stability, whereas lower housing prices suggests affordability. In these categories, Cape Coral's **75.9%** home ownership rate and **$379,600** median home value ranks the City at **3rd** and **4th** places, respectively.



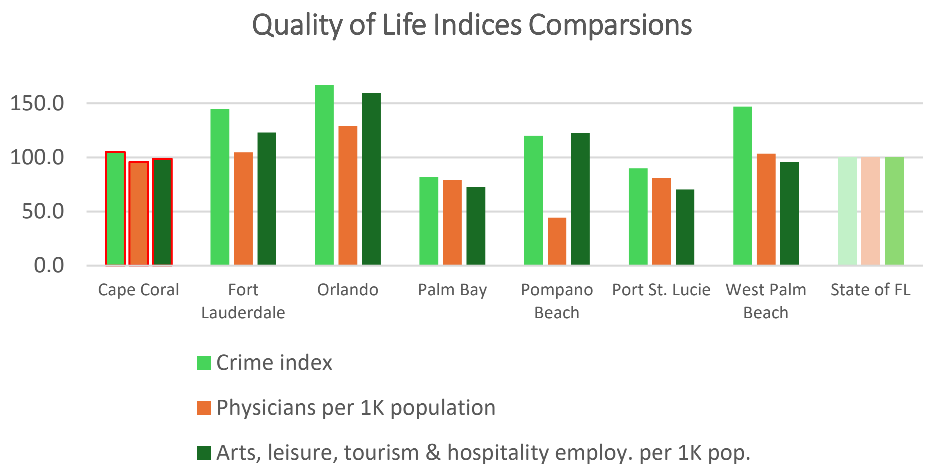
Cost of Living

Reasonability on the Cost of Living index indicates stable economic performance. Cape Coral ranks **3rd** in this category.



Quality of Life

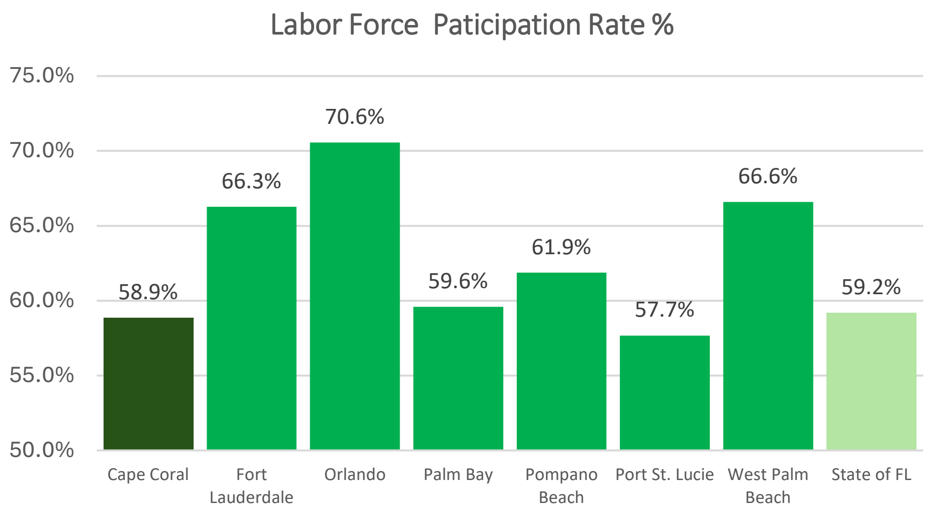
To determine the quality of life, three categories are examined: crime, healthcare, and culture. The Crime index, the Number of Physicians per 1,000 population, and the Arts, Tourism and Hospitality employment per 1,000 population are compared to the State of Florida's average to generate indices. In these three groups, Cape Coral ranks **3rd**, **4th**, and **4th**, respectively.



In this second Econographics section, the role of economics is examined. There are **6** areas of economic analysis.

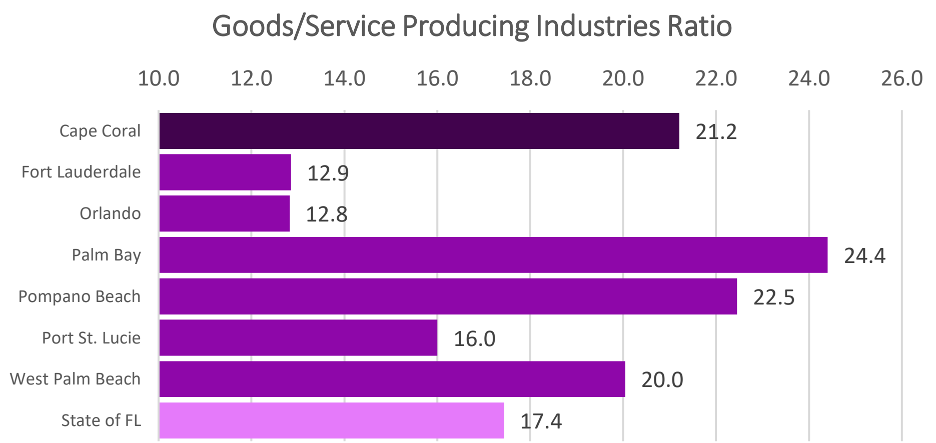
Labor Market Status

Employers around the nation complain about shortages of skilled workers, however, national labor participation rate is not at high levels. Cape Coral's labor force participation rate ranks **6th** among the competing cities.



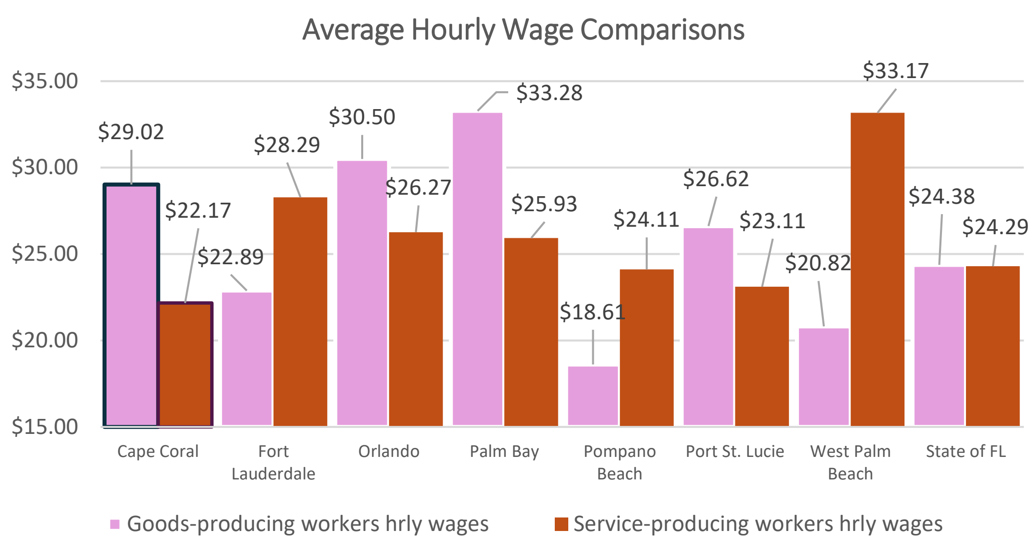
Area Business Patterns

Stable economies have a good balance of goods-producing and service-producing industries. The four goods-producing industries in the U.S. are (1) forestry, hunting and agriculture support; (2) mining; (3) construction; and (4) manufacturing. A ratio is produced through the division of goods-producing industry employment and service-producing industry employment. In this category, Cape Coral ranks in **3rd** place.



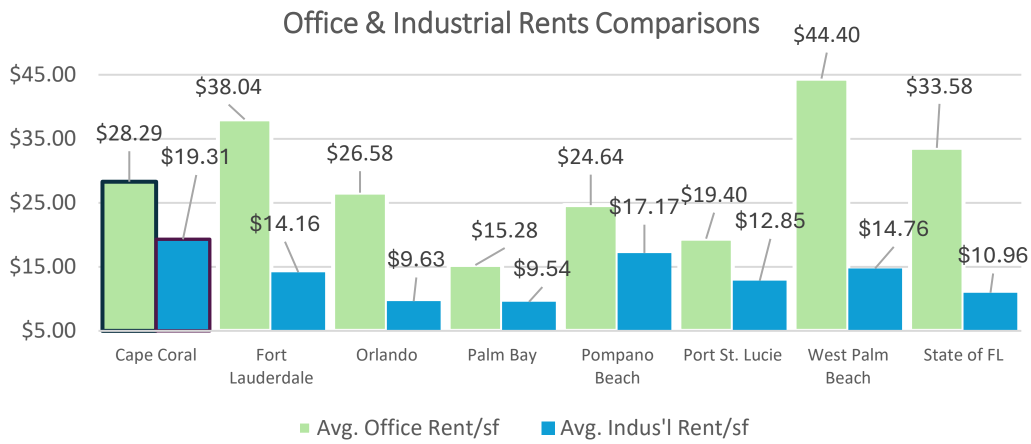
Average Hourly Wages

Increasingly sophisticated business operations require a higher percentage of technically trained skilled workers at reasonable salary levels. In goods-producing industries, Cape Coral ranks **5th**; for service-producing industries the City's rank is **1st** place.



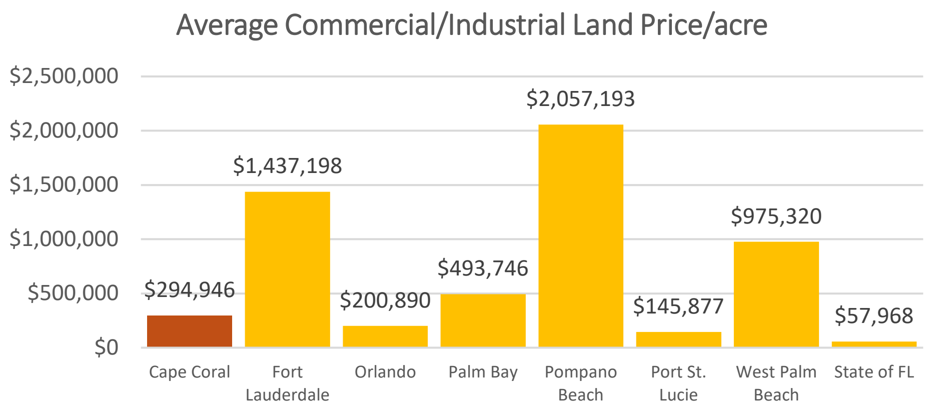
Office & Industrial Real Estate (part 1)

Most new employers opt for or suburban Class A office space or "flex" industrial space if available. In this region, there may be difficulty finding either product. Cape Coral ranks **5th** for office rents affordability and **7th** in industrial rents.



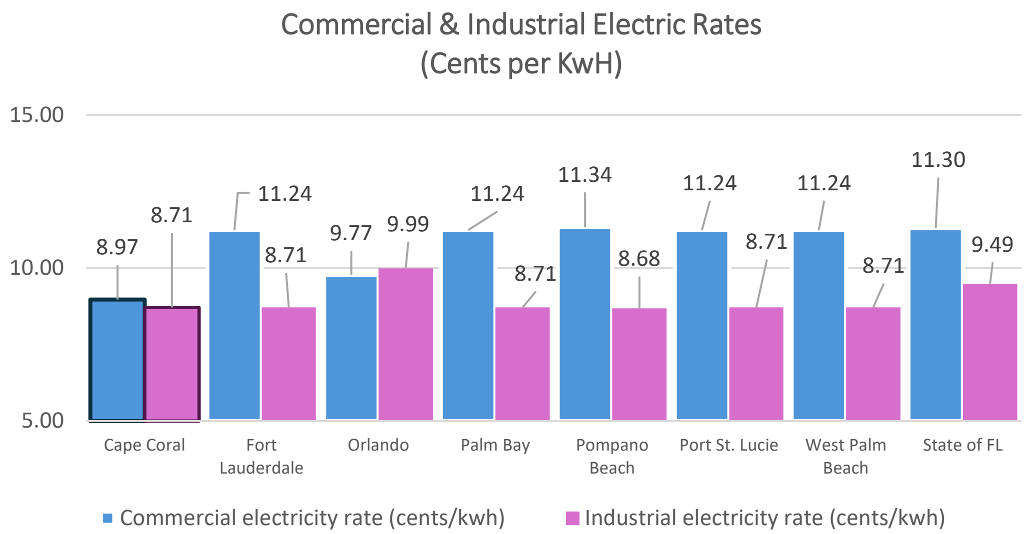
Office & Industrial Real Estate (part 2)

Comparative land prices for commercial (non-residential) and industrial sites indicate valuation fluctuations per market. Cape Coral ranks **3rd** in lower land costs.



Commercial & Indsustrial Electric Rates

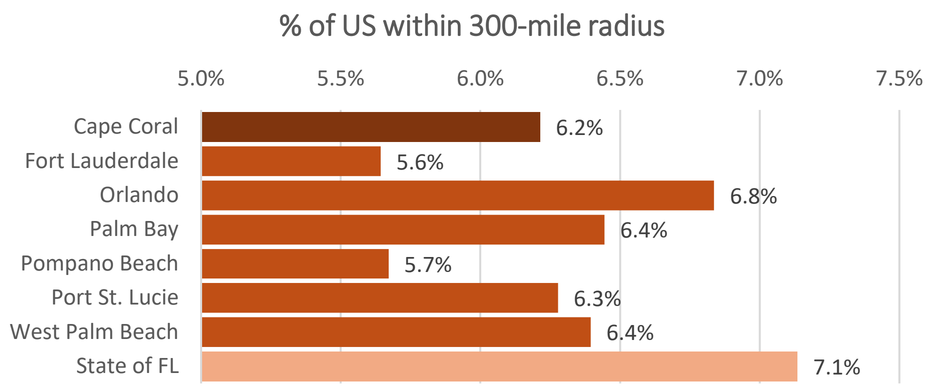
Operating profits are significantly affected by the variation in electric power costs. Individually negotiated rates may be possible, however, published rates are utilized for the comparison. For commercial power rates, Cape Coral ranks in **1st** place; for industrial rates, the City is in **2nd** place.



Results for Cape Coral and each competing city are compared to the corresponding State of Florida average or figure. The following criteria and methodology have been applied in the **5** categories of market investigation.

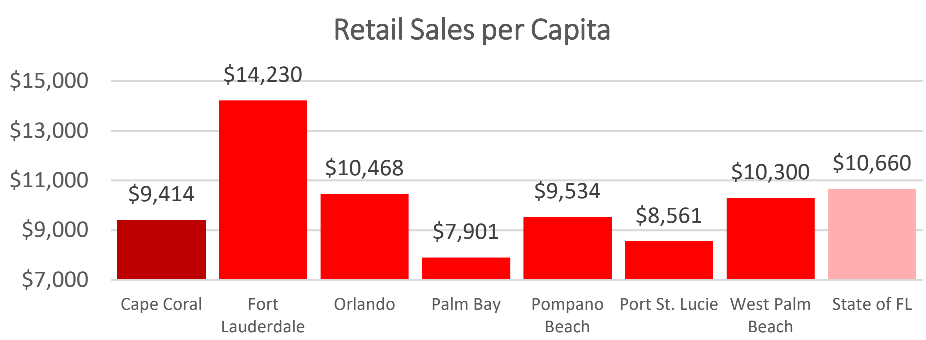
Market Access

For operations at a location, the percent of total US population within six-hour driving radius approximates its practical "just-in-time" delivery zone and aligns with the new operating regulations for the trucking industry. For market access, Cape Coral ranks in **5th** place.



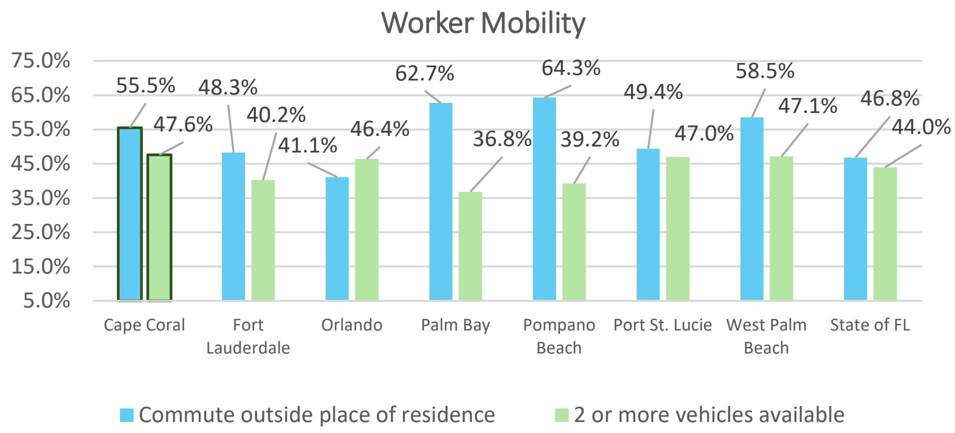
Retail Sales

Annual retail sales represents the location's relative strength. For Cape Coral, the City's ranks is **5th** place.



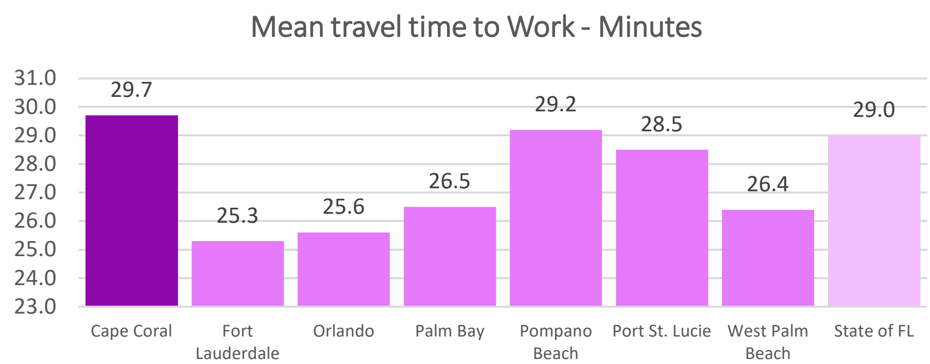
Worker Mobility

Successful development often hinges on the potential to provide an intercept location for workers traveling long commutes. Commutation outside of place of residence or having 2 or more vehicles available are indicators of relative mobility for employees. In these two categories, Cape Coral ranks **4th** and **1st**, respectively



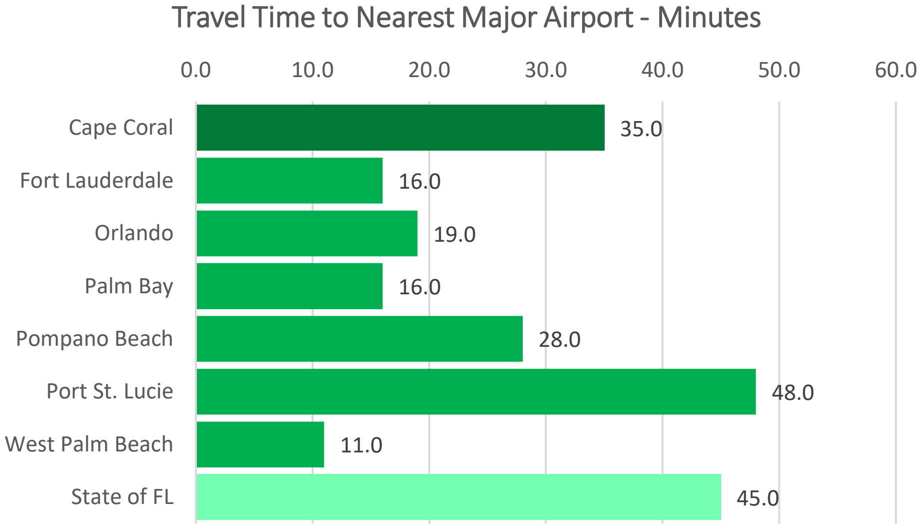
Mean Travel Time to Work

As a second measure of worker mobility, the daily travel time workers exhibit reinforces the intercept location potential. Cape Coral **leads** all others in this metric.



Airport Accessibility

For most businesses, access to a major airport offering domestic connecting or non-stop service and international flights is a key driver for location success. Although there are no published statistics on average driving times to airports offered on a state average, this study will assume a forty-five-minute commuting time as a benchmark to measure local results. In this analysis. Cape Coral ranks in **6th** place.



Ranking Summary

In the 32 total Econographics investigations, the City of Cape Coral ranks an overall **5th** place among the 6 competing cities as shown in Exhibit 2 (below). No weighting has been applied to the ranks. Yellow highlighting idicates above median performance by Cape Coral.

Exhibit 2 – Econographics Ranking

	Cape Coral	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Demographics							
Population Change 2012-2022 %	2	7	4	5	3	1	6
Younger Workers Age group 18-44	7	4	1	5	3	6	2
Median age	7	6	1	4	5	3	2
Total non-white/white ratio	7	5	1	6	3	4	2
English Only Spoken at home	2	4	6	1	7	3	5
Avg. Size of Household	3	7	6	1	5	2	4
Median Household income	3	2	7	4	1	6	5
% Associates Certificates	2	6	5	3	7	1	4
% Bachelors degree.	5	3	2	7	1	6	4
% Graduate degree(s)	6	1	2	4	5	7	3
Home Ownership Rate	3	6	7	2	4	1	5
Median home value	4	7	5	1	2	3	6
Cost of living index	3	7	4	1	6	2	5
Crime index	3	5	7	1	4	2	6
Physicians per 1K population	4	2	1	6	7	5	3
Arts, leisure, tourism & hospitality employ. per 1K pop.	4	2	1	6	3	7	5

Exhibit 2 – Econographics Ranking – cont'd.

	Cape Coral	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Economics							
Labor Force Participation Rate %	6	3	1	5	4	7	2
Goods/Service Producing Industries Ratio	3	6	7	1	2	5	4
Goods-producing workers hrly wages	5	3	6	7	1	4	2
Service-producing workers hrly wages	1	6	5	4	3	2	7
Avg. Office Rent/sf	5	6	4	1	3	2	7
Avg. Indus'l Rent/sf	7	4	2	1	6	3	5
Avg. Commercial/Industrial Land Price/acre	3	6	2	4	7	1	5
Commercial electricity rate (cents/kwh)	1	3	2	3	4	3	3
Industrial electricity rate (cents/kwh)	2	2	3	2	1	2	2
Travel Time to Nearest Major Airport - Minutes	6	2	4	2	5	7	1
Market							
% of US within 300-mile radius	5	7	1	2	6	4	3
Retail sales per capita	5	1	2	7	4	6	3
Commute outside place of residence	4	6	7	2	1	5	3
2 or more vehicles available	1	5	4	7	6	3	2
Mean travel time to Work - minutes	1	7	6	4	2	3	5
Travel Time to Nearest Major Airport - Minutes	6	2	4	2	5	7	1
Average rank	3.94	4.47	3.75	3.47	3.94	3.84	3.81
Final Rank	**5**	**7**	**2**	**1**	**5**	**4**	**3**

PUBLIC & EMPLOYER INTERVIEWS & SURVEYS

The DCG Corplan Team conducted interviews and online surveys with the public, major employers and civic leaders on multiple occasions. Business Expansion & Retention roundtables were held in two sessions in different parts of the City. Specific tourism-related meetings were undertaken with industry specialists.

The following individuals played an important role in providing the team with invaluable insight:

- Gary Aubachon – Local Developer building Slipaway, a Food Truck/ Marina destination
- Annette Barbaccia, Miloff Aubuchon Realty Group - Realtor, Commercial
- Joseph Bonara, Catalyst Development - RE Developer
- JoAnn Elardo – Wicked Dolphin Rum Distillery
- Steve Geiger – General Manager Safe Harbor Marina
- Donna Shuman Germain, Cape Coral Chamber of Commerce - Business Leader
- Donna Germain – President, Cape Coral Chamber of Commerce
- Michael Ilcyzyszn – Cape Coral City Manager
- Pamela Johnson – Ft. Myers Visitors Bureau
- Barry Kadel – General Manager Westin Hotel
- Katie Locklin – Parks & Recreation, Program Supervisor
- Henrik Margard, Nor-Tech Boats - Manufacturer
- Jeff Mielke - Lee County Sports Development
- Larry Nygard, Crown Development - RE Developer
- Charles Pease, Cape Coral Technical College - Educator
- Tamara Pigott- Ft. Myers Visitors Bureau
- James Sommers, RE/Max - Realtor, Residential
- Bill Steinke – City Council Member & TDC Board (Ex-Officio)
- Jeremy Vincent – Jungle Bird and Front Porch Social

The Public Survey was conducted in September 2023, and the Employer Survey in May, 2024. The response rate was varied, with **1,841** for the Public and **162** for the Employer surveys. The survey consisted of **10** questions, **9** of which were multiple choice. The following summarizes the results:

Q1: How long have you been a resident of Cape Coral, Florida?
Leading response: **Five Years**

Q2: Which aspects of infrastructure do you think are most crucial for economic development in our area? Rank by priority of investment.
Leading responses: **Utilities, Multimodal Roadway, Stormwater Management**

Q3: Looking to the future, which areas should Cape Coral prioritize for development over the next decade? (Select up to three):
Leading responses: **Business & Commerce, Healthcare Facilities, Education & Schools**

Q4: How would you rate the effectiveness of local government in addressing community concerns? Leading response: **Not Very Effective**

Q5:. At present, the City of Cape Coral has only one college. What forms of higher education do you think the city currently lacks? (Select any that apply):
Leading responses: **Technical/Vocational Training, Community Colleges**

Q6: How would you rate the employment opportunities in Cape Coral?
Leading response: **Fair**

Q7: What is your opinion about the current state of tourism and its impact on Cape Coral?
Leading response: **It is good, but there are some negative impacts that should be managed**

Q8: Are you in favor of more downtown development projects in Cape Coral?
Leading response: **Strongly in Favor**

Q9: In the future, what would you like to see more of in Cape Coral? (Select up to three):
Leading responses: **Linear Parks & Streetscape Beautification, Outdoor Recreation Opportunities, Cultural Events**

Q10: Please provide any additional comments or concerns you may have about Cape Coral and its future direction. Feel free to explain any of your answers to the questions above.

1,248 written comments were received, and the major themes were as follows:

- Desire for more greenspace throughout the City
- Completion of parks started though GoBond funding
- Rejection of the Jaycee Park plan
- More outdoor recreation activity opportunities
- Full restoration of the Yacht Club beach
- Tourist attraction based on water use
- Installation of shade trees and planted medians
- Installation of sidewalks in residential neighborhoods
- Better policing of traffic violators
- Better controls on vehicle storage and general cleanliness of properties
- Improved traffic control, stoplights, street widening – to handle ever increasing congestion
- Better connectivity to I-75
- Clean-up of canals
- Sensitivity for eco-systems sustainability, including Redfish Point development
- Limitation on rental apartment construction
- More cohesive zoning and planning
- Improvement of building facades in downtown
- Infrastructure improvements, including burying of electrical and telecommunication cabling
- Higher-paying business attraction
- Commercial/office development in the north area
- Attraction of a second hospital/health care provider
- More efficient permitting processes
- Tax reduction
- Responsiveness from municipal government to citizens' needs

The Employer Survey also posed **10** questions, **9** of which were multiple choice. The following summarize the results:

Q1: How long has your business been operating in Cape Coral?
Leading Response: **Ten years**

Q2: What is the primary industry of your business?
Leading Responses: **Other Services, Professional/business, Construction**

Q3: How many employees do you currently have?
Leading Response: **1 to 10**

Q4: Are the majority of job applicants ready for work, or do they require training?
Leading Response: **Minor job training needed**

Q5: What are the most sought after job aspects new applicants have when seeking employment? (Please select up to three)
Leading Responses: **Steady job/employment security, Earn a lot of money, Good benefits**

Q6: Would you be interested in government-sponsored training programs to enhance the skills of your workforce?
Leading Response: **No (But combined Yes and Maybe was a larger total)**

Q7: What are the top three challenges your business is currently facing? (Please select up to three)
Leading Responses: **Hiring skilled employees, High operational costs, Marketing and customer acquisition**

Q8: Which of the following government incentives would be most beneficial for your business? (Please select up to three)
Leading Responses: **Tax breaks or credits, Reduced bureaucracy and faster permit processes, Grants for small businesses**

Q9: How valuable would partnerships between your business and local educational

institutions (e.g., colleges, trade schools) be for your workforce development needs?
Leading Response: **Somewhat valuable**

Q10: What specific government actions or policies would assist your business in achieving greater success?

94 written responses were varied and can be summarized into the following topics:

- Affordable workforce housing
- Better waterway access
- Code enforcement
- Easier access to capital
- Government contracting opportunities
- Government transparency
- Incentivizing flex warehouse development
- Incentivizing manufacturing
- Low interest loans for start-ups
- Lower business taxes
- Partnerships with city processes
- Permit expediting
- Property and flood insurance premium assistance
- Reduction of licensing fees
- Regulatory reduction
- Small business development grants
- Street beautification
- Supply chain improvements
- Upgraded infrastructure
- Vocational training silos for the trades

Business Retention & Expansion Roundtables

Two business meeting “roundtables” in different parts of the City were held, oriented at bringing more awareness of available governmental assistance to the business community. The meeting were organized “Goods-Producing” and “Services-Producing” sectors. The meetings occurred in April 2024 at the two Cape Coral libraries. Event details were as follows:

Goods-Producing Industries

- Construction
- Manufacturing
- Repair & Maintenance
- Real estate
- Warehousing & Storage
- Transportation

Services-Producing Industries

- Professional/business/finance
- Retail
- Education
- Healthcare
- Food Services
- Hospitality
- Arts/Entertainment/Amusement

Focus group discussions emphasized the need to adapt to demographic changes and evolving work trends with supportive infrastructures, such as enhanced business environments, improved training facilities, and streamlined governmental processes. There is a strong call for a community-driven approach to foster a conducive environment for both current residents and future economic prospects.

Tourism Interviews

Tourism interviews were conducted in June 2024. A discussion guide was utilized for each of the interviews to provide a common basis for the conversation, though each interviewee was encouraged to expound on their areas of interest and expertise. Specific stakeholder comments are kept confidential to enable open feedback to be provided.

Tourism related sites visited:

- Cape Coral Yacht Club
- Wicked Dolphin Rum Distillery
- Tito's Cantina
- Westin Hotel
- Tarpon Point Marina
- 47th Terrace, Restaurant Row
- Sun Splash Water Park
- Gator Mike's Family Fun Park
- Lake Kennedy Racquet Facility (Pickleball & Tennis Courts)
- Skate Park
- Bowling Alley
- Dance Theater and Aerial Arts
- Tropical Breeze Fun Park
- Rotary Park Environmental Center
- Four Mile Cove Ecological Preserve
- Edison & Ford Estates, Museum, and Gardens
- River Development/First Ave in Fort Myers

Some key takeaways from the interviews indicated that Cape Coral is situated to unlock its improved tourism driven economic potential. This is the opportune time for the city to take full advantage of its location, available land, resources, and human capital to advance the economic vitality of the City. To achieve this, it will need to move forward on several fronts:

- Build upon the City assets to enhance existing tourism products and attract new ones
- Invest in smart infrastructure resources to support tourism related growth
- Strengthen collaboration with private sector, public/private sector organizations, and other governments to advance tourism

- Put plans into action, monitor progress, and adjust as needed
- Attract more businesses that continue to contribute to the quality of life

Improved tourism will have significant economic, social, and environmental impacts on the City. Some of the examples are:

Economic Benefits

- Revenue Generation: Tourism generates substantial revenue through the spending of tourists on accommodation, food, transportation, entertainment, and shopping.

- Job Creation: The tourism industry creates direct employment opportunities in hotels, restaurants, travel agencies, and attractions, as well as indirect jobs in related sectors such as construction, retail, and transportation. This can be especially true of Cape Coral, which is dominated by small businesses. Travel-dependent leisure and hospitality is the largest small business employer in the US, and it can have a significant impact on Cape Coral.

- Business & Residential Growth: A stronger reputation as a tourist destination will positively affect Cape Coral's perception as a business destination since today's tourist often becomes tomorrow's business owner or homeowner. Several of the individuals interviewed for this assignment were first introduced to Cape Coral as visitors.

- Infrastructure Development: The demand for tourism often leads to improved infrastructure, such as airports, parks, roads, and public transportation, benefiting both tourists and residents.

Social and Cultural Benefits

- Quality of Life: Enhanced amenities and services developed for tourists, such as parks, restaurants, and recreational facilities, can also improve the quality of life for residents.

- Preservation of Heritage: The interest of tourists in historical, cultural, and environmental sites often leads to their preservation, restoration, and expansion.

- Community Development: Tourism can stimulate the development of local communities, providing funds for public services, healthcare, and education.

- Cultural Exchange: Tourism fosters cultural exchange and understanding between people from different backgrounds.

Environmental Benefits

- Conservation Efforts: Revenue from tourism can be directed toward the conservation of natural landscapes, wildlife, and marine environments.

- Awareness and Education: Tourism can raise awareness about environmental issues and the importance of preserving natural resources and ecosystems.

SWOT ANALYSIS

A SWOT analysis is a strategic planning tool that helps businesses and organizations evaluate their strengths, weaknesses, opportunities, and threats. This SWOT is based on a variety of qualitative and quantitative sources, including the Econographics review, opinions gathered through the online survey and interview process, and the DCG Corplan Team observations. The SWOT can be defined as follows:

Strengths (S): performance worthy of continued promotion

Weaknesses (W): deteriorated performance, with unlikely capability of correction

Opportunities (O): emerging performance deserving of promotional development

Threats (T): weakening performance in danger of falling into deteriorated category and requiring immediate attention

In the following pages, the SWOT evaluation details the collective results of the input and encapsulates each category into a list of summary findings. These findings form the basis for a tactical means of developing outcomes through the use of the SWOT Matrix.

Cape Coral's Strengths

Econographics Outcomes	Online Surveys Comments	DCG Corplan Team Observations
Dynamic population growth	Living in paradise	Unique integration of land and water resources)
Literate workforce	Small town "feel"	Waterfront location fostering watersports activities
Low service industry wage patterns	Mangroves and coastal natural resources	Subtropical climate
Cost-saving commercial electric rates	Expansive water views	Engaged and informed public
Mobile labor force	Boating lifestyle	Active real estate development environment
	Proximity to major urban center (Fort Myers)	Forward-thinking political leadership
	Attraction for retirees	Large middle-class population
	Cape Coral Yacht Club	Major waterfront development of Westin Marina Village and Cape Harbour
	Large number of parks	Undeveloped natural coastal resources such as Redfish Point)
	Water resources such as Bimini Basin and Rubican Canal	Active local chamber of commerce
	One of safest cities in Florida	Active county VCB with a knowledgeable and experienced staff.
		Increasingly strong restaurant and food scene
		Major home rental market for vacationers, with home and boat
		Proximity to major urban center (Fort Myers)

Strength's Summary Findings:

1. Dynamic growth
2. Civic engagement
3. Quality of Place

Cape Coral's Weaknesses

Econographics Outcomes	Online Surveys Comments	DCG Corplan Team Observations
Too few younger aged workers	Lack of beaches and public waterfront	Absence of interstate highway connectivity
Rapidly aging population	Distance to I-75	Heavy traffic congestions along bridge corridors
Lack of racial/ethnic diversity	Ugliness of the city	Continuing hurricane risk
Low labor participation rate	Overdevelopment and rapid growth	Confusing street grid
High industrial rent pattern	Lack of greenspace	Suburban sprawl visual identity
Excessive travel to major airport	Destruction of mangroves and coastal resources	Isolated public waterfront use
	Continuing post-hurricane cleanups and restorations	Unavailability of ocean beaches
	Inadequate infrastructure and roadway conditions	Lack of tourism drivers
		Distance Between Attractions
		Limited Number of Hotel Rooms
		Limited access to water for additional tourism development
		Insufficient number of public boat ramps
		No Defined Visitor Domain
		Limited Night life
		Limited Tourism related signage
		Limited Retail Shopping Opportunities that are attractive to tourists
		Limited Public Transportation options
		Insufficient large businesses
		The city lacks a distinct visitor image
		Insufficient focus on tourism

Weaknesses Summary Findings:

1. Environmental risk

2. Physical reality

3. Economic limitations

Cape Coral's Opportunities

Econographics Outcomes	Online Surveys Comments	DCG Corplan Team Observations
Mature/senior workers for leadership positions	Development of affordable housing	Available land for expansion
Available female labor	Increasing the tree canopy	Undeveloped tourism and commerce use for canal system
More workers per household	Exciting developments such as Seven Islands	Bioretention development potential for stormwater mitigation
Adequate household spending potential	Family-oriented theme park	Environmental stewardship and resiliency leadership
Stable housing economy	Corporate office attraction and job creation	Promotion of solar and renewable energy generation
Moderate crime levels	Sports complex/convention center	Further Develop & Promote Parks & Preserves
Good quality of life drivers	More facilities for youth activities	Distinguish City's outdoor recreational assets
Commuting workforce capable of intercept		Further develop and promote the already existing cluster of attractions that are family friendly
		Enhance an already existing event schedule
		Enhance sports fields available for Sports Tourism
		Create (develop) more public boat ramps
		Develop package strategy to help promote attractions
		Educate locals on the benefits of tourism
		Engage and incentivize restaurants and merchants to take a more active role in tourism promotion and events

Opportunities Summary Findings:

1. Environmental resiliency

2. Innovative development

3. Economic expansion

Cape Coral's Threats

Econographics Outcomes	Online Surveys Comments	DCG Corplan Team Observations
Too few college graduates	Apparent lack of planning in favor of expedited growth	Over reliance on Fort Myers for shopping and entertainment
Moderately high good-producing industry wage patterns	Excessive traffic congestion	Lack of gateway welcoming signage or experience
Moderately high office rents	Unenforced traffic and cleanliness codes	Over building of rental housing as opposed to townhomes or condominiums
Restricted distribution capability to US market	Rising cost of living	Not enough commercial office development
Low retail sales per capita	Too many vacation rentals	Not enough industrial development
	Lack of sidewalks	Underdeveloped downtown urban core
	Unresponsiveness of city leadership	Limited retail opportunities
	Overdevelopment of car washes, dollar stores, and storage facilities	Limited cultural facilities
	Lack of supportive infrastructure	Limited shade tree canopy, street plantings, or street beautification
	Limited retail choices	Apparent public leadership distrust
	Failure of city identity as a thriving waterfront community	Increasing traffic congestion & limited parking
		Surrounding beaches drawing tourists from Cape Coral
		Neighboring destinations increasing their tourism funding
		Concern that FT. Myers Visitor's Bureau does not sufficiently promote Cape Coral
		Insufficient data regarding Cape Coral's contribution of tourist taxes
		Limited awareness of tourism assets among locals
		Difficult and slow permitting process for new development

Threats Summary Findings:

1. Market timing & economy
2. Competition
3. Image

SWOT Matrix

The analyses can be summarized through the SWOT Matrix. The two internal values of Strengths (S) and Weaknesses (W) are compared against the two external drivers of Opportunities (O) and Threats (T):

	Opportunities (O)	*Threats (T)*
Strengths (S)	S-O Strategies	S-T Strategies
Weaknesses (W)	W-O Strategies	W-T Strategies

Strength-Opportunities Strategies (S-O)

	Opportunities (O)		
Strengths (S)	*Environmental resiliency*	*Innovative development*	*Economic expansion*
Dynamic Growth	5	5	**10**
Civic engagement	**10**	**10**	5
Quality of Place	**10**	**10**	1

10=High Correlation; 5=Moderate Correlation; 1=Minimal Correlation

Opportunities that capitalize on Strengths

- *Dynamic Growth/Economic expansion:* **evaluate means of balancing housing growth with expansion in jobs and non-residential tax revenue production.**
- *Civic engagement/Environmental resiliency:* **establish a public forum or outreach method that educates the public on environmental sustainability programs that are achievable and practical.**
- *Civic engagement/Innovative development:* **establish a public forum or outreach method to discuss innovative approaches to land use that primarily serve the community.**
- *Quality of Place/Environmental resiliency:* **design and encourage dual-use environmental programs such as bioretention of stormwater that are both aesthetically pleasing but also functional.**

- *Quality of Place/Innovative development:* **develop new land use guidelines that promote innovative ideas that capitalize on Cape Coral's unique character, such as canal use.**

Weaknesses-Opportunities Strategies (W-O)

	Opportunities (O)		
Weaknesses (W)	*Environmental resiliency*	*Innovative development*	*Economic expansion*
Environmental risk	**10**	**10**	**10**
Physical reality	1	5	**10**
Economic limitations	5	**10**	**10**

10=High Correlation; 5=Moderate Correlation; 1=Minimal Correlation

Overcome Weaknesses to pursue Opportunities

- *Environmental risk/Environmental resiliency:* **evaluate and select resiliency solutions that can address short- and long-term impacts by major weather events.**

- *Environmental risk/ Innovative development:* **establish guidelines for new development projects that are sustainable to wind and flood impacts and that can provide dual-purpose functionality, such as a civic center serving as a hurricane shelter.**

- *Environmental risk/Economic expansion:* **recruit and pursue new business attraction that is not restricted to operate in high natural hazard areas, such as certain insurance companies.**

- *Physical reality/Economic expansion:* **identify Cape Coral's realistic opportunity for new business attraction by evaluating industries' requirements for air, highway, water, and rail transportation services.**

Strengths-Threats Strategies (S-T)

	Threats (T)		
Strengths (S)	*Market timing & Economy*	*Competition*	*Image*
Dynamic Growth	**10**	1	5
Civic engagement	**10**	**10**	**10**
Quality of Place	5	5	**10**

10=High Correlation; 5=Moderate Correlation; 1=Minimal Correlation

<u>Reduce vulnerability to external Threats</u>

- *Dynamic Growth/Market timing & Economy:* **evaluate patterns of new population growth and entitle development of support retail and services to match growth.**
- *Civic engagement /Market timing & Economy:* **engage public support for new investments by demonstrating benefits to be derived locally.**
- *Civic engagement /Competition:* **create a public outreach to determine what retail or services categories are available in competing markets but not in Cape Coral.**
- *Civic engagement /Image:* **engage the public for a series of visioning sessions to identify what type of city that Cape Coral is attempting to become.**
- *Quality of Place/Image:* **utilize the best assets of Cape Coral, including new strategic approaches, to promote a new image for the City in marketing efforts.**

Weaknesses-Threats Strategies (W-T)

	Threats (T)		
Weaknesses (W)	*Market timing & Economy*	*Competition*	*Image*
Environmental risk	**10**	1	**10**
Physical reality	5	**10**	**10**
Economic limitations	**10**	**10**	5

10=High Correlation; 5=Moderate Correlation; 1=Minimal Correlation

<u>Prevent Weaknesses from being susceptible to external Threats</u>

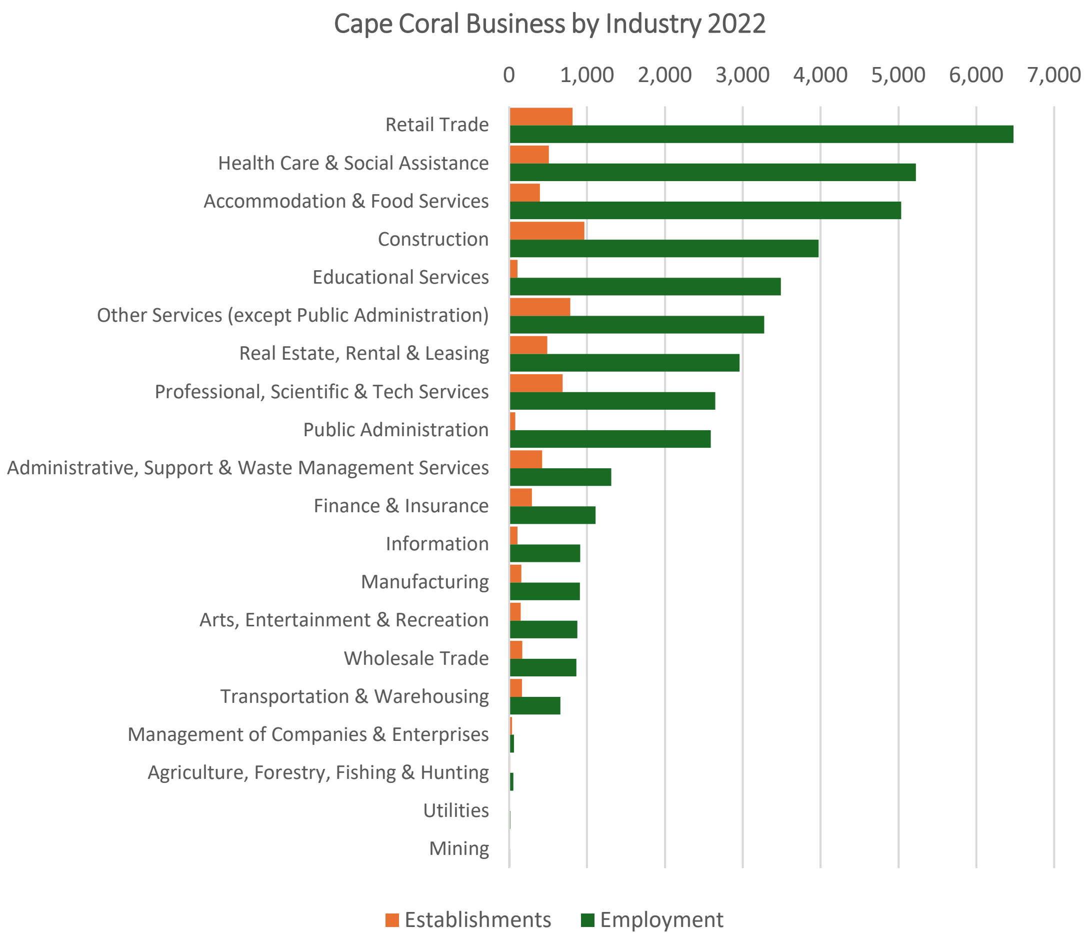
- *Environmental risk/Market timing & Economy:* **making informed investment decisions based on statistical probabilities of severe weather events.**
- *Environmental risk/Image:* **ascertain that media coverage of pre- and post-weather events are balanced and reinforce mitigation and recovery efforts.**
- *Physical reality/Competition:* **"best practices" review of competing areas' overcoming of physical limitations in marketing efforts.**
- *Physical reality/Image:* **unbiased self-examination by leadership of Cape Coral's assets, drawbacks, and drivers for promotion.**
- *Economic limitations/Market timing & Economy:* **corrective measures to be taken to reinforce workforce performance and economic development initiatives for long-term change.**
- *Economic limitations/Competition:* **awareness of the influence of competing cities for new business attraction and formulation of a plan to make substantive changes where possible to alter Cape Coral's limitations.**

EMPLOYMENT TRENDS

Cape Coral Business Employment

In 2022, Cape Coral Business Employment was identified at **42,460** persons. Data for this conclusion was extrapolated from the US Census and ESRI.

In Cape Coral, there are **6,351** active businesses employment with th City. The **20** categories of industry employment produces the following as shown as shown below:



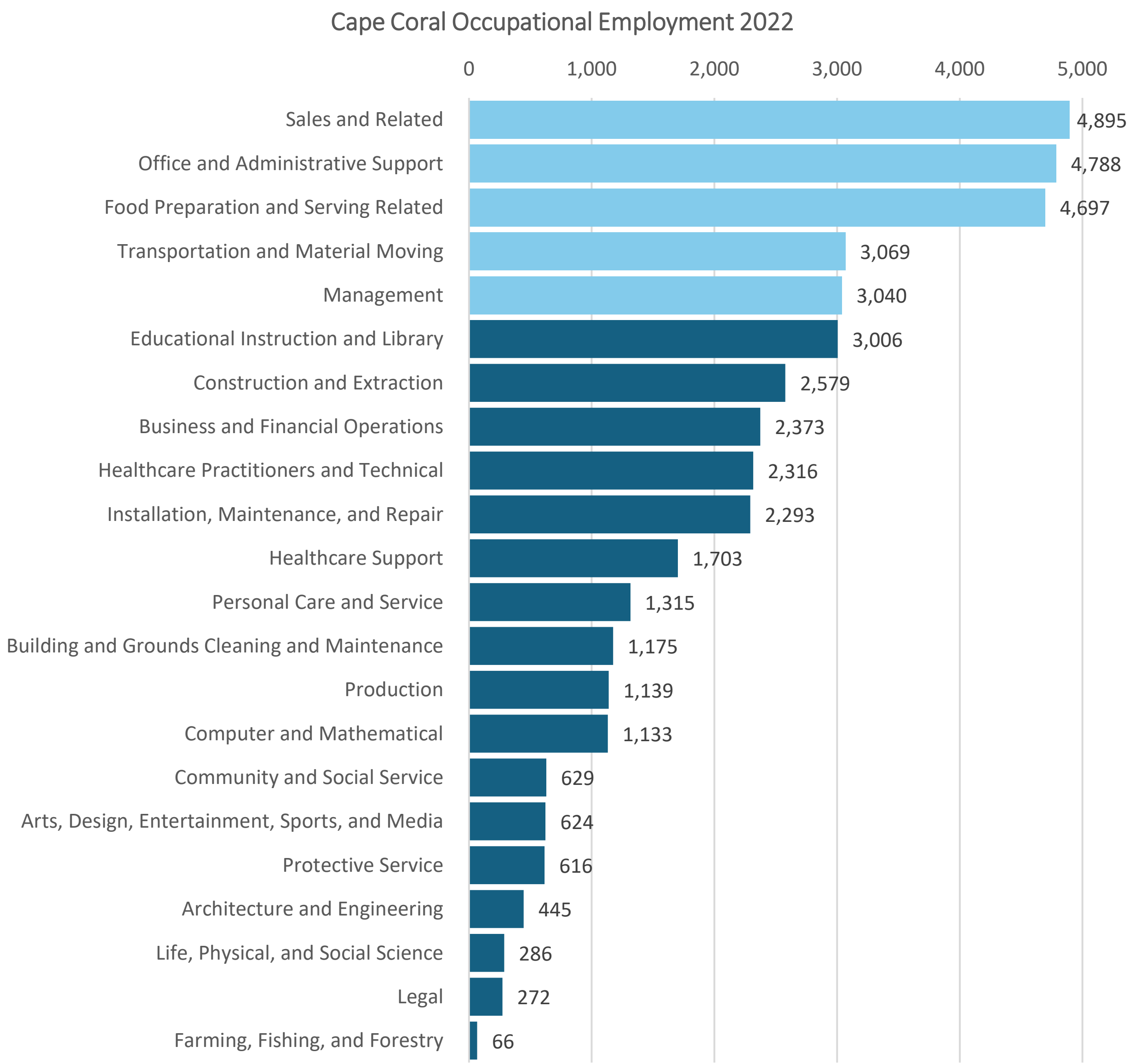
For each of the **20** industry categories of Cape Coral Business Employment, the following summarizes the major occupational groups that are most likely prevalent in each industry. The analysis is derived from the national patterns by industry applied to the local Cape Coral environment. While it is not possible to identify the exact numbers of local jobs by occupation in each industry, the analysis provides a reasonable estimate of employment makeup for each sector. (Note: the analysis excludes the last four industries due to low employment figures):

Retail Trade	Health Care & Social Assistance	Accommodation & Food Services
Top **5** leading job categories: **5,496** jobs (**91%**)	Top **5** leading job categories: **4,410** jobs (**84%**)	Top **5** leading job categories: **4,535** jobs (**90%**)
• Sales & Related	• Healthcare Practitioners & Technical	• Food Preparation & Serving Related
• Transportation & Material Moving	• Healthcare Support	• Building & Grounds Cleaning & Maintenance
• Office & Admin. Support	• Office & Admin. Support	• Management
• Installation, Maint., & Repair	• Community & Social Service	• Office & Admin. Support
• Management	• Management	• Sales & Related
Construction	**Educational Services**	**Other Services**
Top **5** leading job categories: **3,596** jobs (**90%**)	Top **5** leading job categories: **2,765** jobs (**79%**)	Top **5** leading job categories: **2,223** jobs (**68%**)
• Construction & Extraction	• Educational Instruction & Library	• Personal Care & Service
• Office & Admin. Support	• Office & Admin. Support	• Installation, Maint., & Repair
• Installation, Maint., & Repair	• Management	• Office & Admin. Support
• Management	• Building & Grounds Cleaning & Maintenance	• Transportation & Material Moving
• Business & Financial Operations	• Community & Social Service	• Management
Real Estate Rental and Leasing	**Professional, Scientific & Tech Services**	**Public Administration**
Top **5** leading job categories: **2,388** jobs (**81%**)	Top **5** leading job categories: **1,903** jobs (**79%**)	Top **5** leading job categories: **1,677** jobs (**65%**)
• Sales & Related	• Business & Financial Operations Business & Financial Operations	• Educational Instruction & Library
• Installation, Maint., & Repair	• Computer & Mathematical	• Office & Admin. Support
• Management	• Office and Administrative Support	• Protective Service

Resident Labor Force Employment

• Office & Admin. Support	• Management	• Business & Financial Operations
• Business & Financial Operations	• Architecture & Engineering	• Healthcare Practitioners & Technical
Administrative, Support & Waste Management Services	Finance & Insurance	Information
Top **5** leading job categories: **865** jobs (**66%**)	Top **5** leading job categories: **1,070** jobs (**97%**)	Top **5** leading job categories: **677** jobs (**74%**)
• Building & Grounds Cleaning and Maintenance	• Office & Admin. Support	• Computer & Mathematical
• Office & Admin. Support	• Business & Financial Operations	• Arts, Design, Entertainment, Sports, & Media
• Transportation & Material Moving	• Sales & Related	• Management
• Protective Service	• Management	• Office & Admin. Support
• Production	• Computer & Mathematical	• Sales & Related
Manufacturing	Arts, Entertainment & Recreation	Wholesale Trade
Top **5** leading job categories: **712** jobs (**78%**)	Top **5** leading job categories: **598** jobs (**68%**)	Top **5** leading job categories: **678** jobs (**78%**)
• Production	• Personal Care & Service	• Transportation & Material Moving
• Transportation & Material Moving	• Food Preparation & Serving Related	• Sales & Related
• Office & Admin. Support	• Office & Admin. Support	• Office & Admin. Support
• Management	• Arts, Design, Entertainment, Sports, & Media	• Management
• Architecture & Engineering	• Building & Grounds Cleaning and Maintenance	• Installation, Maintenance, & Repair
Transportation & Warehousing		
Top **5** leading job categories: **618** jobs (**94%**)		
• Transportation & Material Moving		
• Office a& Admin. Support		
• Installation, Maint., & Repair		
• Management		
• Business & Financial Operations		

The chart below summarizes the estimated employment by ranked major occupation for the 42,460 employment. The **5** leading categories represent **20,489** jobs or **48%** of the total local employment:



The 2022 Civilian Labor force estimate for the City of Cape Coral was **102,700** persons. As shown below, these persons were employed in **24** categories of occupations as defined by the Census. The **5** leading occupational groups accounted for nearly **half** of Cape Coral workers:

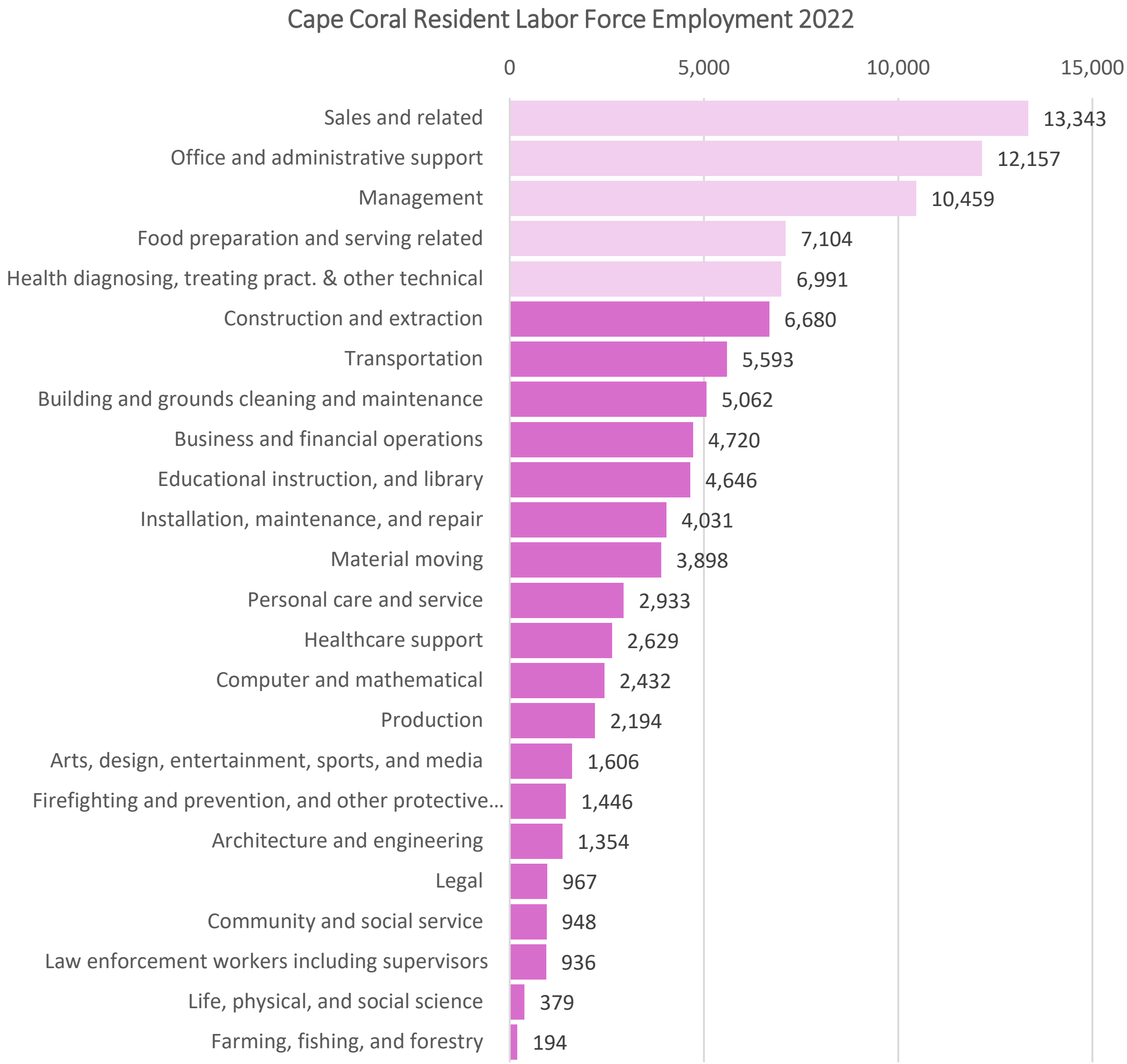
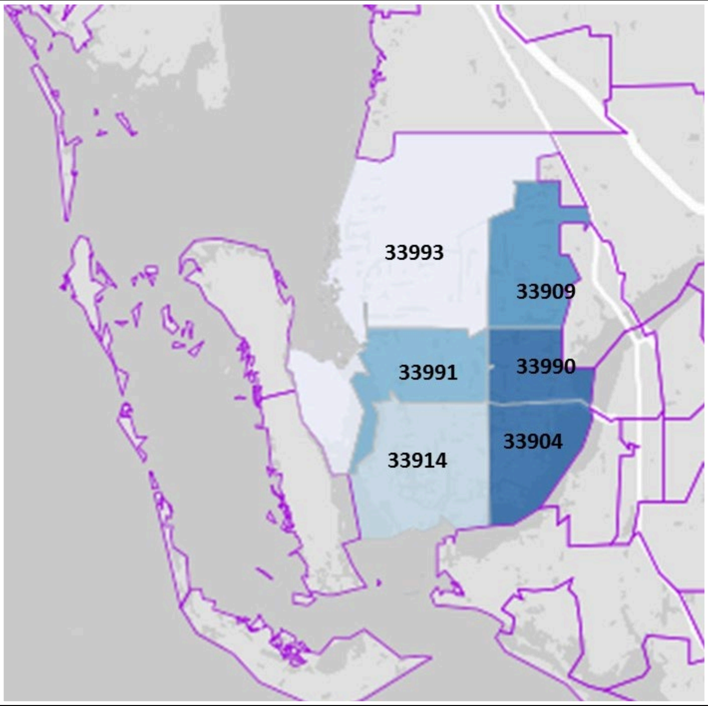
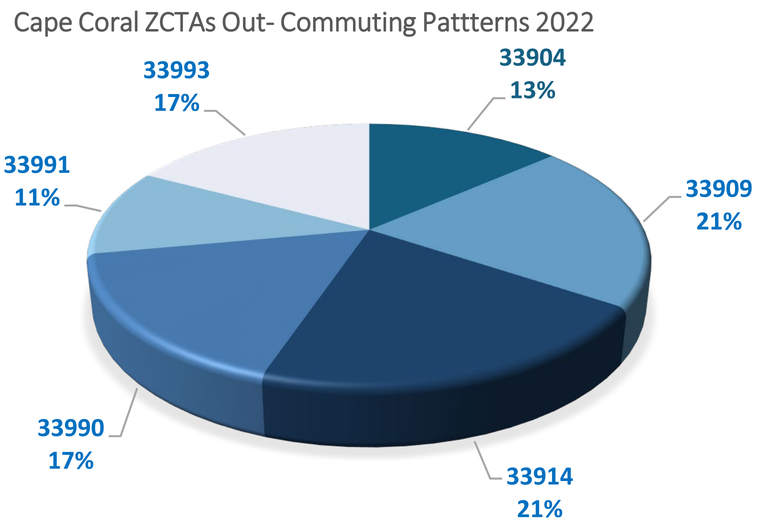


Exhibit 3 – Zip Code Tabulation Areas of the City of Cape Coral



Source: US Census Bureau

There is no specific means of determining how much of the resident labor force is employed by local businesses other than the US Census Commuting Patterns in the American Community Survey (ACS). For each of the six Zip Code Tabulation Areas (ZCTAs) that comprise the City of Cape Coral (see map left), the Commuting Outside Place of Residence is a percentage of the civilian labor force accounted for by area. By weighted averaging of the ACS, **56.5%** of the Resident Labor Force, or nearly **58,000** workers are leaving Cape Coral daily to work elsewhere. Capture of a significant share of those workers must become a priority for the City going forward.



TARGET INDUSTRY ANALYSIS

In this section, the potential for economic advancement for the City of Cape Coral is evaluated by examination of the targeted industries for the area. The methodology for this analysis is the Location Quotients (*LQ*) tabular and charting technique. In this method, industry employment is plotted for the projected 2022-2030 period using Lee County and the State of Florida Long-Term Industry Employment projections.

Increases in employment are generally considered as the truest indicator of business growth, revenue gains and profitability. The analysis forecasts those industries that are present in Cape Coral and that demonstrate growth opportunity or currently are of such legacy value that continuing efforts for sustainability are paramount.

What is an LQ and How is it Used?

Location Quotients (LQ's) are developed by comparing the local employment concentration by industry against a larger sample, in this case the State of Florida. By example, if an industry has a local employment of 150 which might represent 5% of total the local labor market and the same industry for Florida has a 7% share of the State's total, the LQ for this industry is produced through the quotient of 5% divided by 7%, or, an LQ of 0.71.

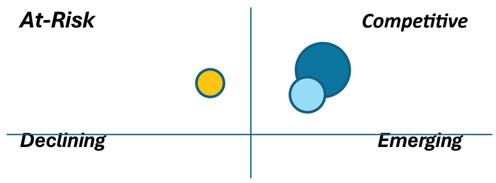
The goal of the LQ analyses is to identify local industries that are performing at higher levels of employment concentration than their state counterparts, thereby indicating that these industries have a more important role locally than regionally. Locally strong industries are more easily promoted and reinforced by economic development initiatives and help to identify the locality's unique characteristics. Thus, an industry of LQ greater than 1.0 (parity with State levels) reveals an indication that this industry should be considered as locally relevant.

Another important element of this method is the change of LQ's over the evaluation period. Positive annual percentage gain in LQ reinforces the industry's importance; loss indicates a decline in performance.

Employment data in NAICS is segmented into 20 super-sectors containing 79 three-digit sub-components, which represent more detailed refinements of the original 20 categories. NAICS provides industry detail down to the six-digit level covering over 800 individual industry titles. However, for purposes of this study, the three-digit level of detail is utilized. In order to streamline some of the NAICS catgeories, the following major grouping of **14** industries has been created of which all subsequent industry analyses is organized:

- Agriculture, Forestry, Fishing & Hunting
- Construction
- Education, Healthcare & Social Assistance
- Financial Activities
- Information
- Mining & Utilities
- Manufacturing
- Other Services
- Professional & Business Services
- Public Administration
- Retail Trade
- Tourism & Leisure
- Transportation & Warehousing
- Wholesale Trade

The LQ Chart



The LQ chart is an important resource as industries can be graphically represented in four quadrants.   Year 2030 estimated employment by industry is shown as "bubbles"; the LQ change in the 2022-2030 period is the "X" axis; and the projected 2030 LQ is the "Y" axis.   The X axis crosses the Y axis at the value of 1.0, thereby plotting the results for either success in exceeding Florida state parity or failing to meet this criterion. Each quadrant is labeled as follows: *Competitive* – dominant industries in the Region; *Emerging* – emerging industries not yet achieving critical mass; *At-Risk* – formerly strong industries (legacy) that are losing power and influence; or, *Declining* – industries that may be in danger of non-sustainability in the Region. The location of the employment "bubbles" on the chart demonstrates the industries' role for the local economy.

The major industrial sectors present in Cape Coral are illustrated in the LQ chart and table in Exhibit 4 (below). Year 2022 employment of **42,460** is expected to grow by **4,234** jobs by 2030, totaling **46,694** positions.

Exhibit 4 - City of Cape Coral Industries - LQ Chart: Major Sectors 2022-2030

Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	2022-2030 Job Chnge
AGRICULTURE, FORESTRY, FISHING & HUNTING	50	-2.37	0.83	DEC	-12
CONSTRUCTION	8,001	0.51	2.48	COM	1,159
EDUCATION, HEALTHCARE & SOCIAL ASSISTANCE	4,326	-0.17	0.55	DEC	523
FINANCIAL ACTIVITIES	3,209	-0.17	0.96	DEC	236
INFORMATION	431	-1.38	0.84	DEC	-24
MINING & UTILITIES	36	0.31	0.27	EMG	2
MANUFACTURING	1,167	0.54	1.18	COM	102
OTHER SERVICES	2,749	0.19	1.45	COM	295
PROFESSIONAL & BUSINESS SERVICES	6,334	-0.53	0.82	DEC	553
PUBLIC ADMINISTRATION	3,235	0.39	0.57	EMG	285
RETAIL TRADE	7,881	0.33	1.42	COM	416
TOURISM & LEISURE	7,836	-0.34	1.15	A-R	593
TRANSPORTATION & WAREHOUSING	614	-0.17	0.55	DEC	32
WHOLESALE TRADE	824	0.50	0.45	EMG	73
Total	**46,694**			**Job Change Total**	**4,234**

The top **5** industry sectors account for **74%** of new employment, and **77%** of all new job gains. Construction employment represents the single largest employment category in the City of Cape Coral with a growth of **1,159** jobs forecasted by yr. 2030. Retail Trade and Tourism, & Leisure follow, with **416** and **593** new jobs expected, respectively. Professional & Business Services comes next, with **553** jobs forecasted. Finally, Education, Healthcare & Social Assistance rounds out the top five with **523** new jobs expected.

Through a rigorous LQ investigation of each major sector and their accompanying industry subsectors (NAICS-3 digit level), **24** new industry categories are identified as preliminary targets. Summary of Preliminary Identified Target Industries as either the competitive or emerging Tier 1 (**15** industries) or the at-risk or declining Tier 2 (**9** industries):

<u>Retail Trade</u>

- Motor Vehicle & Parts Dealers *(Competitive, Tier 1)*
- Food & Beverage Stores *(Competitive, Tier 1)*
- Gasoline Stations *(At-Risk, Tier 2)*
- Clothing & Clothing Accessories Stores *(Competitive, Tier 1)*
- Furniture, Home Furnishings, Electronics, and Appliance Retailers *(Competitive, Tier 1)*
- Sporting Goods, Hobby, Musical Instrument, & Book Stores *(Competitive, Tier 1)*

<u>Financial Activities</u>

- Credit Intermediation and Related Activities *(Declining, Tier 2)*
- Securities, Commodity Contracts, and Other Financial Investments and Related Activities *(Emerging, Tier 1)*
- Real Estate *(At-Risk, Tier 2)*
- Rental and Leasing Services *(Competitive, Tier 1)*

<u>Education, Healthcare & Social Assistance</u>

- Ambulatory Health Care Services *(Declining, Tier 2)*
- Hospitals *(Declining, Tier 2)*
- Social Assistance *(Emerging, Tier 1)*

Manufacturing

- Printing & Related Support Activities *(Competitive, Tier 1)*
- Fabricated Metal Products Mfg. *(Competitive, Tier 1)*

Information

- Publishing Industries (except Internet) *(Emerging, Tier 1)*
- Telecommunications *(At-Risk, Tier 2)*

Professional & Business Services

- Professional, Scientific, & Technical Services *(Declining, Tier 2)*
- Administrative and Support Services *(Declining, Tier 2)*

Tourism & Leisure

- Food Services & Drinking Places *(At-Risk, Tier 2)*

Other Services

- Repair and Maintenance *(Competitive, Tier 1)*

Construction

- Specialty Trade Contractors *(Competitive, Tier 1)*

Wholesale Trade

- Merchant Wholesalers, Durable Goods *(Emerging, Tier 1)*

Public Administration

- Government *(Emerging, Tier 1)*

What Industries Are We Missing?

The 15 Tier 1 and the 9 Tier 2 preliminary targets have been identified by use of the 3-digit NAICS hierarchy. Under each of these headings are many sub-sector industries that have 2022 employment data but without any forward-looking projections. In this task, the objective is to evaluate:

1. Whether they have a LQ of 1.0 (parity with Florida) or better.

2. What level of employment should be targeted to at least bring them to the 1.0 parity.

3. Whether missing industries should be considered for targeting for the City and at what targeted employment size.

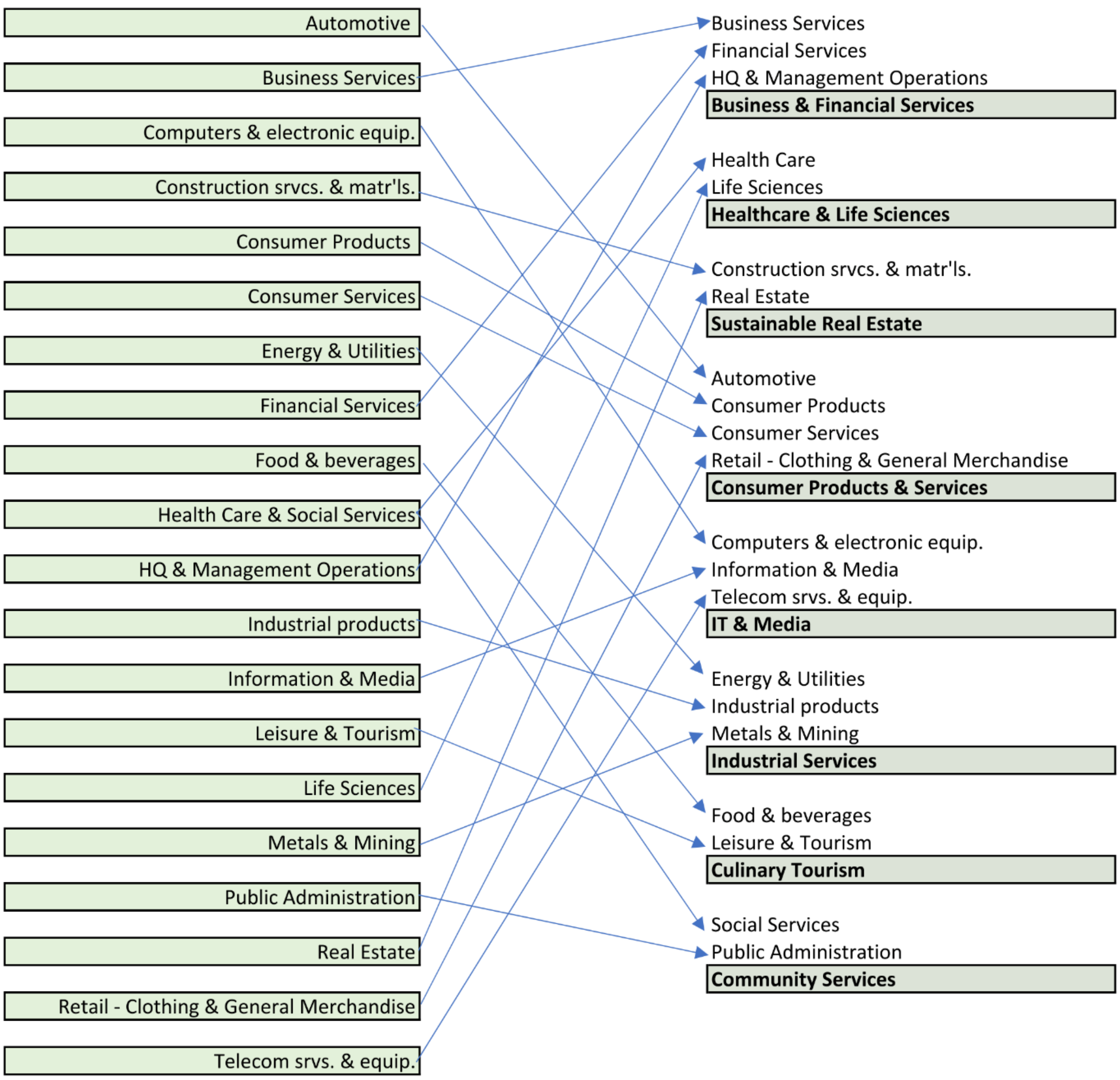
The outcome is the identification of **65** 4-digit NAICS industries as preliminary targets for Cape Coral in **11** major industry sectors. These industries represent the areas where the City should focus its marketing efforts as new opportunities for economic growth and expansion.

In total, these industries represent a potential employment gain of **13,640** new jobs, if even the minimum LQ parity level of 1.0 is achieved for each category. Effective economic development applied in the attraction and recruitment of new companies in these areas should provide even greater employment results.

Cluster Mapping

As defined by Harvard University, "a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support.

To determine the final cluster selections, the "crosswalk" graphic (below) Illustrates how arrangement of the components leads to a logical selection of the final clusters:



For the final **8** clusters, the 4-digit target industries are shown in the tables below, organized by cluster heading:

Business & Financial Services		# of new jobs
5221	Depository credit intermediation	759
5222	Nondepository credit intermediation	62
5223	Activities related to credit intermediation	32
5231	Securities and commodity contracts intermediation and brokerage	140
5411	Legal services	222
5416	Management, scientific, and technical consulting services	274
5611	Office administrative services	53
5612	Facilities support services	73
5613	Employment services	1,476
5614	Business support services	359
5616	Investigation and security services	142
5619	Other support services	83
	Subtotal	**3,675**

Healthcare & Life Sciences		# of new jobs
5417	Scientific research and development services	127
6211	Offices of physicians	678
6212	Offices of dentists	22
6213	Offices of other health practitioners	14
6214	Outpatient care centers	103
6215	Medical and diagnostic laboratories	92
6216	Home health care services	302
6219	Other ambulatory health care services	106
6221	General medical and surgical hospitals	1,515
6222	Psychiatric and substance abuse hospitals	45
6223	Specialty (except psychiatric and substance abuse) hospitals	83
	Subtotal	**3,087**

Sustainable Real Estate		# of new jobs
4233	Lumber and other construction materials merchant wholesalers	69
5311	Lessors of real estate	39
5313	Activities related to real estate	58
5413	Architectural, engineering, and related services	206
	Subtotal	**372**

Consumer Products & Services		# of new jobs
4231	Motor vehicle and motor vehicle parts and supplies merchant wholesalers	88
4234	Professional and commercial equipment and supplies merchant wholesalers	269
4236	Household appliances and electrical and electronic goods merchant wholesalers	42
4237	Hardware, and plumbing and heating equipment and supplies merchant wholesalers	44
4239	Miscellaneous durable goods merchant wholesalers	98
4411	Automobile dealers	372
4581	Clothing and clothing accessories retailers	80
4582	Shoe retailers	70
4591	Sporting goods, hobby, and musical instrument retailers	147
4592	Book retailers and news dealers	19
4593	Florists	18
4595	Used merchandise retailers	134
5321	Automotive equipment rental and leasing	49
	Subtotal	**1,430**

IT & Media		# of new jobs
5121	Motion picture and video industries	68
5122	Sound recording industries	7
5132	Software publishers	137
5161	Radio and television broadcasting stations	37
5162	Media streaming distribution services, social networks, and other media networks and content providers	45
5174	Satellite telecommunications	3
5178	All other telecommunications	11
5415	Computer systems design and related services	397
5418	Advertising, public relations, and related services	22

8112	Electronic and precision equipment repair and maintenance	43
	Subtotal	**770**

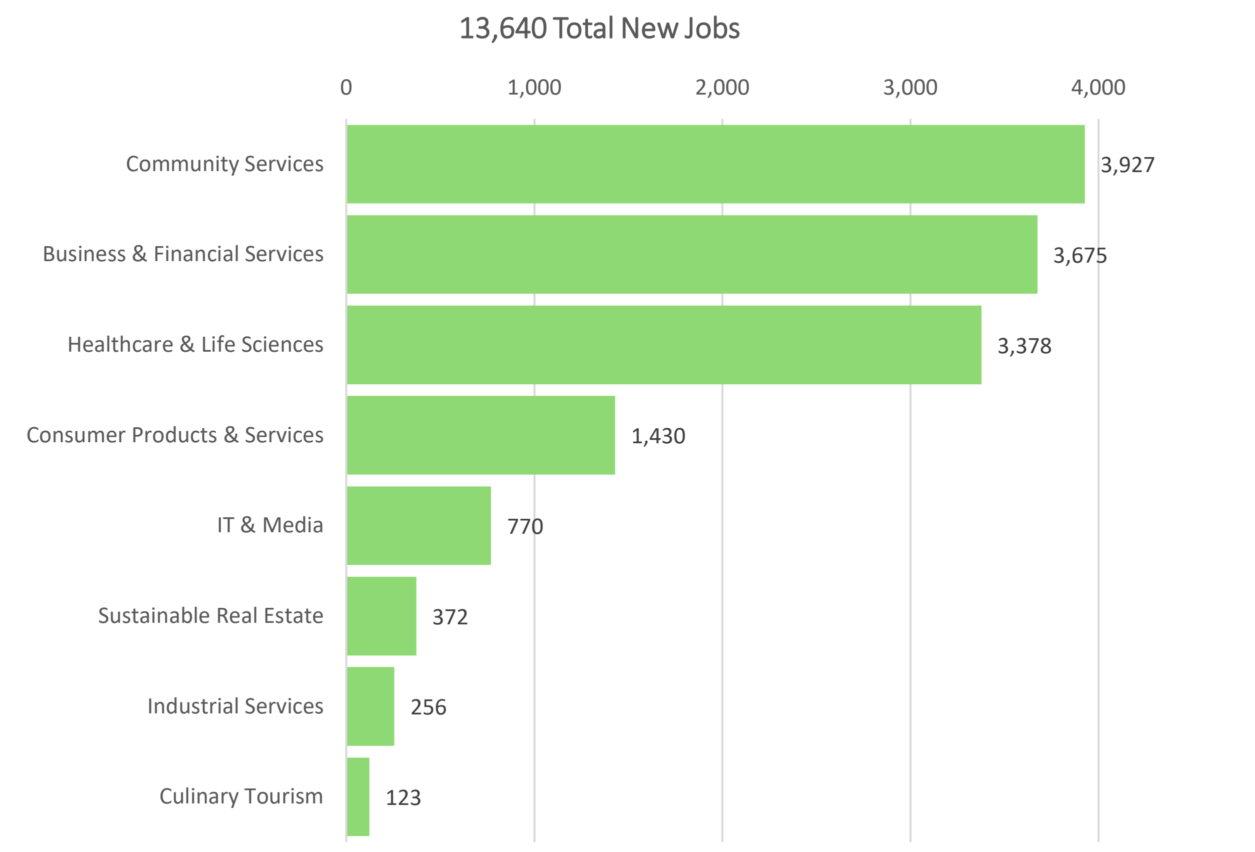
Industrial Services		**# of new jobs**
3327	Machine shops; turned product; and screw, nut, and bolt manufacturing	30
3328	Coating, engraving, heat treating, and allied activities	12
3329	Other fabricated metal product manufacturing	35
4235	Metal and mineral (except petroleum) merchant wholesalers	25
4238	Machinery, equipment, and supplies merchant wholesalers	89
4572	Fuel dealers	11
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	54
	Subtotal	**256**

Culinary Tourism		**# of new jobs**
4452	Specialty food retailers	6
7223	Special food services	117
	Subtotal	**123**

Community Services		**# of new jobs**
6241	Individual and family services	170
6242	Community food and housing, and emergency and other relief services	50
6243	Vocational rehabilitation services	71
9100	Federal Government	713
9200	State Government	879
9300	Local Government	2,044
	Subtotal	**3,927**

To summarize, Exhibit 5 (below) graphically illustrates the distribution of the total **13,640** new jobs forecasted to be created through the target industry process:

Exhibit 5 – Cape Coral Target Industry Clusters



Economic Impacts

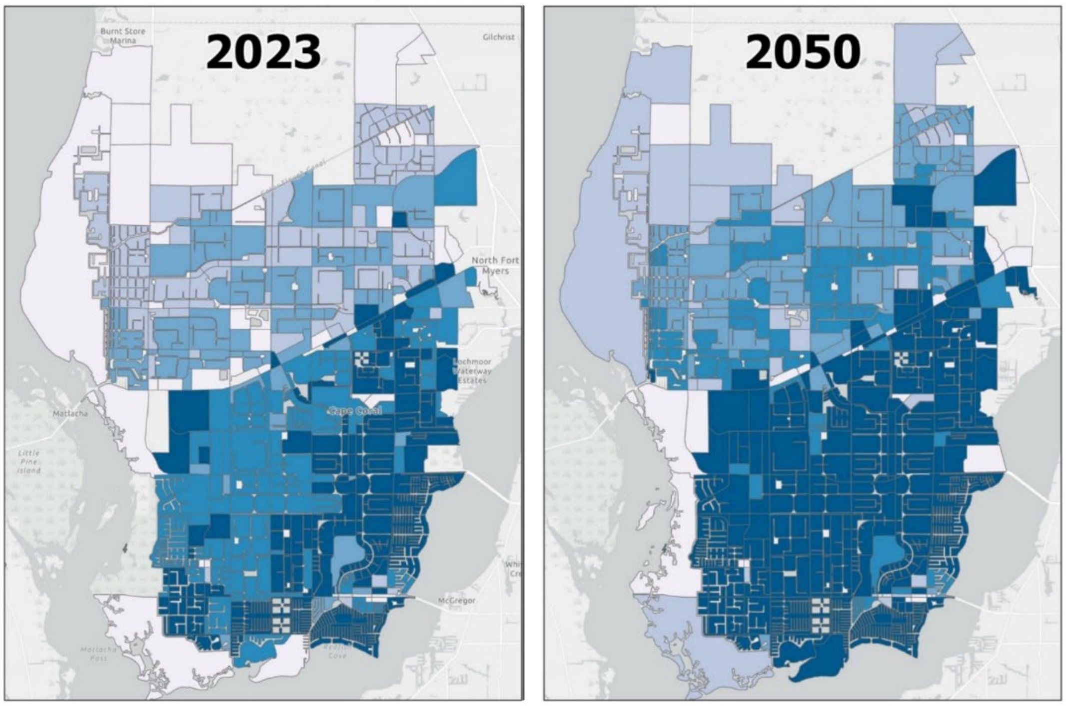
The 13,640 forecasted total employment for the 8 targeted industry clusters will produce a total of **15,162** new jobs (direct, indirect, and induced) and an annual total economic impact of **$3.358 billion**, as shown in the table below:

Cluster	Direct Empl.	Indirect Empl.	Induced Empl.	Total Empl.	Labor Income	GDP Value Added	Total output
Business & Financial Services	3,675	253	50	3,978	$ 254,634,600	$ 298,732,600	$ 614,095,700
Community Services	3,927	446	59	4,431	$ 443,126,600	$ 7,577,354,500	$ 1,344,640,000
Consumer Products & Services	1,430	131	24	1,585	$ 130,667,800	$ 225,113,600	$ 379,315,000
Culinary Tourism	123	2	1	126	$ 4,257,600	$ 7,040,300	$ 11,071,000
Healthcare & Life Sciences	3,087	264	96	3,448	$ 281,772,100	$ 328,634,800	$ 568,359,400
Industrial Services	256	36	14	306	$ 31,137,800	$ 50,646,900	$ 92,081,300
IT & Media	770	93	10	874	$ 56,682,700	$ 87,414,300	$ 255,355,000
Sustainable Real Estate	372	36		414	$ 28,321,700	$ 51,842,700	$ 92,640,400
Total	**13,640**	**1,262**	**254**	**15,162**	**$ 1,230,600,900**	**$ 8,626,779,700**	**$ 3,357,557,800**

Refer to the Appendices for industry prospectuses developed for each of the **8** target industry clusters.

Metro Forecasting Models' Interactive Growth Model (IGM) has analyzed Cape Coral's growth and predicts that the population will grow by **100,000** persons in the next **25** years. At final build-out, the City should reach a population of **375,000** people, exceeding the current populations of Cleveland, Honolulu, or New Orleans. While continued infill of platted lots south of Pine Island Road will continue, the major growth will occur in the northern sections, as show in the IGM maps in Exhibit 6 below:

Exhibit 6 – Cape Coral Build-Out Density – 2023 versus 2050



Source: Metro Forecasting Models

Real Estate

The City of Cape Coral's **119.4** square mile area is catalogued by **127,830** individual property records totaling **57,213** acres not including canals and roadways. Utilizing Lee County's Property Appraiser records, there are total of **1,575** non-residential improved properties in **38** categories of building use (Department of Revenue Code – DOR). The tax database is the most reliable source of evaluating existing buildings on a city-wide scale.

There are five major groups of DOR categories:

- Commercial (**22** uses)
- Industrial (**4** uses)
- Institutional (**5** uses)
- Governmental (**6** uses)
- Miscellaneous (**1** use)

Commercial

The Commercial sector is segmented into Financial, Food Service, Lodging, Mixed Use, Offices, Recreation, Retail, and Service categories. In total, there are **1,032** buildings containing **10,469,780** sf, with an average age of **31.5** years. In the past ten years, **1,053,921** sf of inventory has been added, or a gain of **10.1** percent.

The group is a largely older building stock that has not witnessed dynamic growth in Cape Coral. With an inventory gain of only **10.1%** in the past ten years, the opportunity to fill space needs at present for the targeted industry employment will be problematic without more inventory additions. The three key areas of office, retail and food services are key to this pathway.

Commercial real estate data indicates that the office market in Cape Coral is very tight. Cushman & Wakefield's 2nd Quarter 2024 shows an office inventory of about **1.63 million** sf with a vacancy rate of only **1.1%** and no new office projects under construction. Current net absorption is a positive **3,000** sf indicating further tightening of the market.

Industrial

The Industrial sector is segmented into: Light manufacturing; Cannery, brewery, winery; Mineral processing; and, Warehousing, distribution terminals categories. In total, there are **332** buildings containing **4,970,503** sf, with an average age of **27.8** years. In the past ten years, **961,909** sf of inventory has been added, or a gain of **19.4** percent.

This sector is a largely older building stock that is seeing new life primarily in the development of self-storage facilities. There is limited flex building construction or larger distribution-type warehouses with high cube volume being erected. Especially missing is refrigerated or freezer warehouse space for food storge.

According to commercial realtors, Cape Coral has an industrial inventory of **3.26 million** sf that is currently **1.9%** vacant. Net absorption is a negative **48,000** sf, implying that supply is outpacing demand. The report indicates that **38,000** sf of industrial space is under construction.

Institutional

The Institutional sector is segmented into: Churches, Temples; Private schools & and colleges; Privately owned hospitals; Mortuary, Cemetery, Crematorium; and, Clubs, Lodges, Union Halls. In total, there are **87** buildings containing **1,227,137** sf, with an average age of **38.2** years. In the past ten years, **189,668** sf of inventory has been added, or a gain of **15.5** percent.

While new development activity in this sector is marginal, the need for institutional investment is one that parallels population growth. As Cape Coral attracts a larger and more diverse resident base, the need for multiethnic religious, educational, and social facilities will also increase. Specialty healthcare is a priority and the growing national shortage of nurses and healthcare workers is placing much too great a financial strain on large public hospitals. Cape Coral has a few urgent care locations, but the demand will be for more as the population grows.

Government

The Government sector is segmented into: Public County schools; Hospitals; Lee County - Other, State of Florida - Other; US Gov't – Other; and, City of Cape Coral - Other. In total, there are **108** buildings containing **4,964,644** sf, with an average age of **32.7** years. In the past ten years, **100,347** sf of inventory has been added, or a gain of **2.0** percent.

Investment in public facilities is often a measured and judicious process based on reasonable assumption of population growth and serviceability of selected locations. Local, state, and federal guidelines for building siting and development are beyond the scope of this study, however, some recommendations can be made from data developed during this analysis. Key areas include number of public schools, libraries, post offices, and hospitals.

Miscellaneous

The only component of this group is Utilities. There are **16** buildings totaling **32,211** sf with an age of **28.3** yrs. In the past 10 years, no new construction has been added to the inventory, making this an inactive element. Existing construction has primarily occurred south of Pine Island Rd. on various roadways. The average building size is **2,013** sf.

Utility building construction directly follows infrastructure development and expansion. Added to this list of owners would be the City's utility facilities which are likely catalogued under the Government section. While it is unknown how many new utility buildings will be needed in the future, it is certain that they will follow the population expansion northward.

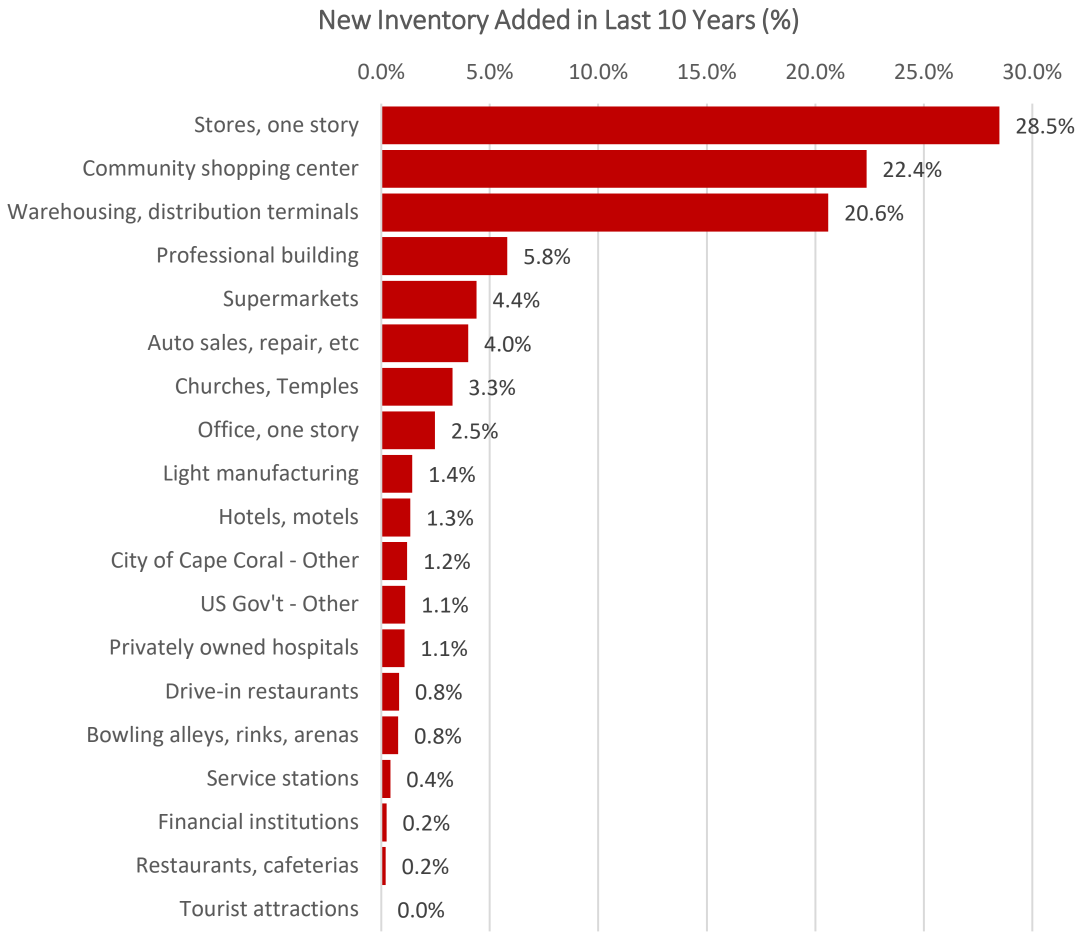
Summary

In total, the 1,575 buildings account for **21,664,775** square feet of floor space. The building stock is largely older in nature, with a weighted average of **30.1** years occurring. In the past ten years, **4,367,796** sf of new space has between added to the inventory, or a gain of only **20.2** percent. It should be noted that inventory growth has been witnessed in only **half** (19) of the 38 categories.

Inventory gains have been led primarily by the top five categories, totaling **3,566,051** sf or **81.6%** of total new space:

- Stores, one story – **1,244,050** sf (**28.5%**)
- Community shopping centers -- **976,568** sf (**22.4%**)
- Warehousing, distribution terminals -- **899,690** sf (**20.6%**)
- Professional buildings -- **253,765** sf (**5.8%**)
- Supermarkets – **191,978** sf (**4.4%**)

The distribution of new construction is shown in the chart below:



Due to its development history, Cape Coral is a wide expanse of pre-platted residential lots with little consideration for progressive zoning of graduated land use densities. In many places throughout the City, there is lack of "four-corner" commercial development which would normally allow a scale down of uses from mid-rise commercial or mixed use gradually down to single family lots.

Assemblage is the Answer

In real estate, two contiguous parcels can, in many instances, command higher value if combined. This term is known as "assemblage" and developers often seek opportunities to achieve property assemblages to reduce overall costs and increase buildable area of properties. In this regard, there is a benefit to the developer in terms of more building area being provided over the same land costs, resulting in lower costs per square foot of delivered product gained by efficiency. For single-family development, this approach leads to a larger home to be built. But for multi-family development, this can result in additional units.

Recognizing that demands on land use will be changing with population increases, the City has designated its Future Land Use (FLU) categories to meet those needs. Much of the North Cape area which was previously zoned as R-1 Single Family residential has been reclassified as Single Family and Multi Family. In Cape Coral's Land Development Code, R-1 zoning standards restrict density to a maximum of 4.4 housing units per acre. This is the basis for the 80 ft x 125 ft lots of 10,000 sf. The zone district dimensions table describes the setbacks and density for a single-family lot:

R-1 Zone										
Min Lot Area	Max Imp Coverage	Front	Front Cul-de-Sac	Side	Rear	Double Frontage	Corner Lot Side	Max Height	Max Density	Lot Area/Unit
10,000 sf	60%	25 ft	18 ft	7.5 ft	20 ft	25 ft	10 ft	38 ft	4.4 /acre	10,000 sf

But, given the FLU changes to allow multi-family uses in former R-1 zones, it would be ideal to examine the next lowest density use, the Residential Multi-Family Low (RML).

Residential Multi-Family Low (RML) Zone										
Min Lot Area	Max Imp Coverage	Front	Front Cul-de-Sac	Side	Rear	Double Frontage	Corner Lot Side	Max Height	Max Density	Lot Area/Unit
10,000 sf	60%	25 ft	36 / 30	7.5 ft	20 / 10	25 ft	10 ft	50 ft	16.0 /acre	2,720 sf

The higher density allowance of the RML offers the potential to develop low-rise apartment projects on assembled lots in duplex, triplex, and quadplex configurations. These housing models can be accomplished in compact, walk-up, breezeway connected apartment flats that can be erected quickly and affordably on a large scale.

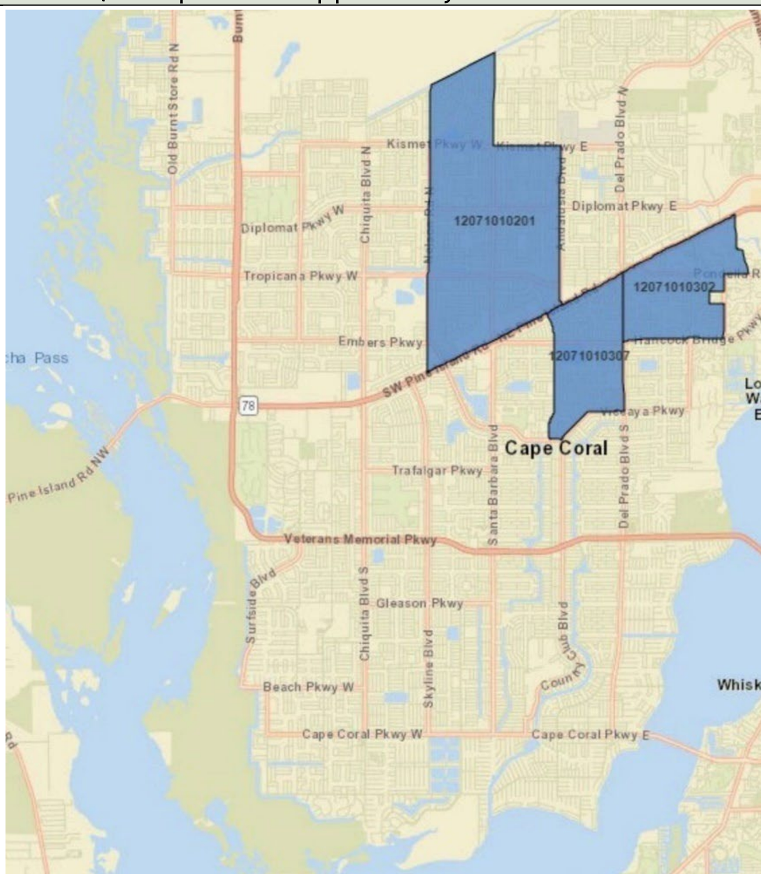
In a recently prepared Need for Multi-Family Rental Apartments Study prepared for the City by Reinhold P. Wolff Economic Research, Inc., there is an annual shortfall of about **704** units per year that are needed to meet demand by middle income groups.

The preceding Target Industry analysis determined that new workers in tourism, industrial services, and community services will be needed in the immediate future. Many of these occupations are only at the middle-income level, and the cost of housing in Cape Coral is rapidly outpacing essential service workers' capability to live within the community they serve.

While developers are benefiting from the State of Florida Live Local SB-102 workforce housing initiative, these are largely significantly-sized developments that will contain at least **71** units to be eligible. Certainly, this is a laudable program and the City should encourage its use.

In parallel, the City should seek other avenues for affordable housing production. As shown in Exhibit 7 (below), Cape Coral's Opportunity Zones (OZ) cover approximately **5,454** acres or **8.5** square miles, with a total of **17,371** parcels, **6,546** of which are vacant (**37%**). The City of Cape Coral owns **75** of the vacant parcels in OZ's, set aside for future use as well or other public assets, leaving a total of **6,471** parcels or **1,962** acres of vacant land in private ownership.

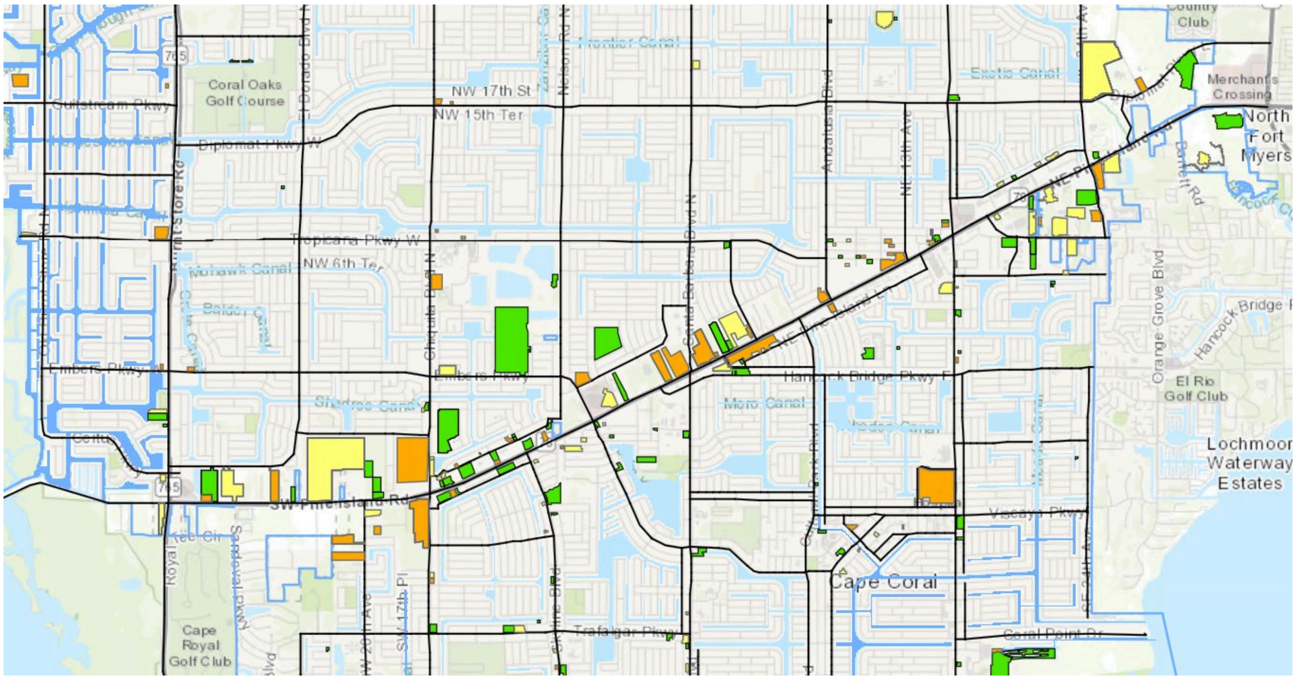
Exhibit 7 – Cape Coral Opportunity Zones



Because of the large number of vacant parcels and the usefulness of Opportunity Zones to stimulate economic development, there is a potential to satisfy the need for affordable housing though judicious land use efforts that can benefit from existing legislation.

Pine Island Road Corridor

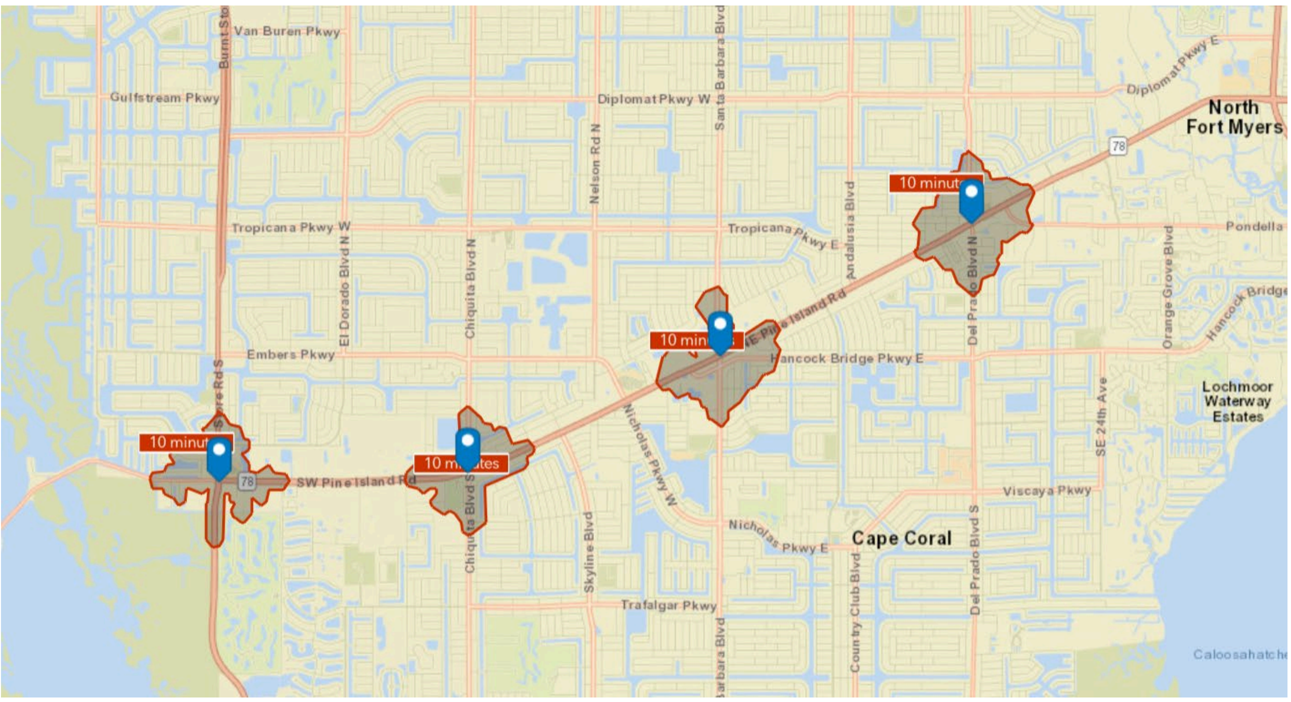
Development along the Pine Island Road Corridor is continuing at a brisk pace. The area is acknowledged as the shopping district for Cape Coral and is the primary focus of developers. The graphic below illustrates the nearly **85** projects in varying levels of development approval in the corridor:



Retail, food service, and mixed-use housing represent the dominant drivers for the Pine Island Road Corridor, and mostly all available parcels have been devoted to that effort. Notable projects west of Chiquita Blvd. such as the Coral Grove Town Center will bring office development opportunities that may partially address the targeted industry focus for more professional and white-collar workers. The remaining larger acreage properties in this area belong to Lee Memorial Health or Walmart.

According to the SR 78/Pine Island Rd. Corridor Vision Plan, ongoing evaluation of safety improvements are being conducted. Recognition of traffic conditions that lead to crashes as well as protection for walking or bicycling pedestrians are being studied. Over-reliance on automobiles is the root cause for traffic issues, and making shopping destinations more interdimensional may provide the answer.

Traditional four-corner commercial infill provides for the convenience of inter-related activities of shopping, banking, dining, mailing or shipping, and more from a centralized location. Parking and walking to adjacent retail or services offers a “Main Street” experience that is lacking on the Pine Island Road corridor. Retail locations are too distant or separated to be convenient for foot traffic. In the graphic below, the four major intersections of Del Prado Blvd., Santa Barbara Blvd. Chiquita Blvd., and Burnt Store Rd. are illustrated with 10-minute walk-time polygons, showing the relative distances which separate these sites.



According to ESRI, the density of existing businesses within each polygon decreases from east to west:

- **188** businesses - Del Prado Blvd.
- **149** businesses - Santa Barbara Blvd.
- **109** businesses - Chiquita Blvd.
  - **4** businesses - Burnt Store Rd.

The objective should be to promote more business activity within comfortable walking distances. In total, there are **450** businesses within the four polygons. Using the median value of **129** businesses, both Del Prado and Santa Barbara are above the median density value, but both Chiquita and Burnt Store are below. Consequently, there should be efforts to promote at least **20** more businesses within the 10-minute walk zone at Chqquita Blvd., and **125** new businesses in the area of the Burnt Store Rd. intersection. Through judicious use of smaller pad site development in large parking lots or parcels, smaller operations such as dry cleaners, coffee shops, or professional offices can be integrated into the larger properties but closer to the street lines and crossings.

Telecommunications

The City of Cape Coral Information Technology Plan 2023 recommends expansion of the City's fiber ring to additional City assets. Primarily, those assets include:

- Parks
- Fire Stations
- Utilities
- Wells
- Master pumping stations

To meet the cabling goal, approximately **142** miles of fiber optic will be installed. According to the City's Information Technology Services (ITS) Dept. approximately **40%-50%** of the objective has been met. ITS indicates that completion of the effort will be by the end of 2027. At this time, about **30%** of parks in the City have WIFI capability.

The fiber optic cabling installation will connect **65** City locations and **139** utility assets. To accomplish this, the Utility Expansion Project (UEP) in coordination with Information Technology Serviced (ITS) is burying "dark fiber" conduits in all new utility trench excavations. This cooperative arrangement will reduce the cost and timelines for fiber optic services to needed City location as well as residential area expansions.

The City has operating agreements with private contractors (Summit Broadband, Lightspeed Construction, Intelligent Infrastructure Solutions) as well as Lee County on dark fiber installation and leasing. As new fiber optics demand is projected, the City is installing a **288**-strand dark fiber in conduit in cooperation with Utilities construction. Of this cable, **144** strands will be dedicated to City use (**50%**), and another **72** strands will be left in reserve. This would leave **72** strands (**25%**) as possibly redundant.

The City's ITS suggests that a maximum of **120** miles of cable could be considered for lease. Leasing of excess dark fiber by municipalities to a variety of commercial or institutional enterprises is common:

- Manufacturing and logistical companies
- E-commerce and retail operations
- Schools
- Hotels
- Government institutions
- Internet providers
- Telecommunication companies

Given the excess capacity, the City might encourage the leasing of excess dark fiber if verified as not needed for future expansion. As a caveat, the City has contractual restraints with Lee County DOT that could impact this lease scenario. To save costs in building out the fiber ring conduit sharing agreements are in place with Summit Broadband and Lee County DOT. The Lee County DOT agreement states, "*The County and the City shall not lease or otherwise allow any third parties to use fiber optic cables or conduit provided by the other Party hereunder.*"

Smart Cities

Smart cities rely on data being collected, distributed and shared in real-time with all relevant stakeholders, from municipal staff to businesses and citizens . The building blocks for successful smart city development include the following:

- A comprehensive 4G/5G communications network that spans the municipality in Real-time
- Internet of Things (IoT) sensors, deployed to collect a range of data, from air quality and traffic volumes to energy usage and water levels
- Open standards for data, that mean they can be easily shared internally and externally
- User friendly interfaces to deliver information to citizens, businesses and staff. These could be online portals, digital signage, apps, connected cars, or data visualizations
- Ways of analyzing/using data (such as AI, digital twins, and automation), enabling effective action to be taken, based on up-to-date information

The City of Cape Coral has embarked on a smart city infrastructure through the innovations shown below:

- Surveillance cameras
- Public Wi-fi
- Informational kiosks
- License plate readers

A potential for the City's Utilities and Public Works departments would be to consider Real-time IoT sensors that monitor street flooding and other resiliency information that can be integrated with Cape Coral's 3-1-1 network.

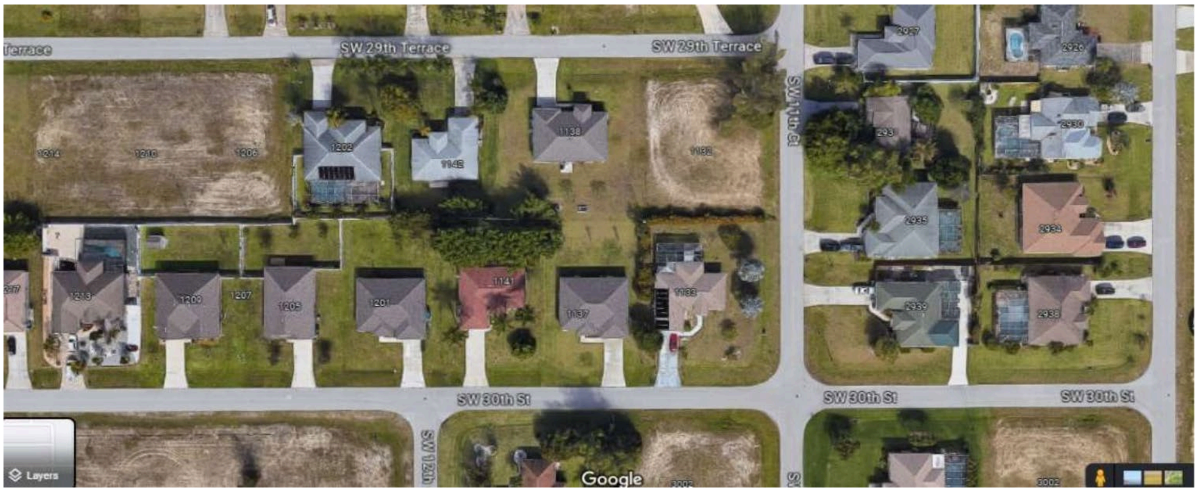
Stormwater Infrastructure

Given Cape Coral's unique location and degree of canal development, a particular emphasis is needed relative to storms and weather events. As Cape Coral continues to grow in population and impervious surface area, stormwater management will also increase in its demands on City services.

Perhaps an alternative course of action can be achieved through **Low Impact Development (LID)**. LID is a management approach that can reduce runoff and pollutant loadings as close to its source as possible. LID includes overall site design approaches and individual small-scale stormwater management practices. These practices promote use of natural systems for infiltration, evapotranspiration, and harvesting and reuse of rainwater.

Solar Infrastructure

A casual examination solar use reveals few instances of roof-top solar being employed in Cape Coral (see photo below). This has been found this to be not uncommon in other Florida locations as well, where more northern states are taking great advantages of the opportunity for solar installation and its accompanying utility costs benefits.



Historically, significant restrictions imposed by electric utilities has hampered widespread solar use, mainly by the requirement that all solar generation must be connected to the utility grid. Recent changes to the net metering process allows for the “banking” of excess kWh power as credits toward usage. Florida currently does not offer state-specific battery incentives, and solar batteries may not appear to be financially favorable to Florida homeowners, because of the consumer-friendly nature of net metering. Additionally, none of the utility companies in Florida offer a “virtual power plant ” program for homeowners. However, if a battery backup power source for a residence, all batteries above **3 kWh** in size are eligible for the **30%** federal tax credit.

Florida offers a Solar Sales Tax Exemption which exempts sales tax on solar equipment purchase, as well as a Solar Property Tax Exemption for homes using solar energy as a source of power, exempting the value of the solar system from property tax.

The Residential Clean Energy Credit, formerly known as the federal investment tax credit, can reduce solar installation costs by as much as **30%**, including all equipment, labor, permitting, and sales tax.

While the City of Cape Coral is in the process of seeking alternative electric power options, a potential benefit may be gained from mass solar generation and storage. Commonly occurring power disruptions from weather events can be partially alleviated for critical use facilities simply through adequate solar generation management.

Transportation Infrastructure

Cape Coral's unique location is also its drawback. This is a city with no seaports, airports, train stations, interstate highway access, or municipal bus system. In many ways, Cape Coral is just a suburban town. But, with a growing population already exceeding metropolises such Salt Lake City, transportation plays a crucial role in Cape Coral's future.

Bus service in Cape Coral is provided by LeeTran as the City does not operate its own bus system. The fixed route has limited route offerings which are mainly oriented toward connections back to Fort Myers and North Fort Myers. There are four transfer stations in Cape Coral for bus connections:

- Cape Coral Transfer Station (downtown)
- Coralwood Mall Transfer
- Cape Coral Hospital Transfer
- Merchants Crossing Transfer

The bus lines serve the Southeast and Northeast Cape areas but the Southwest and Northwest neighborhoods are devoid of bus service. Future population growth is anticipated in these unserved areas and residents as well as seasonal visitors have no mass transit opportunities to utilize.

According to LeeTran, ridership and revenue per mile on the overall county system is decreasing as measured through from the FY13-14 through FY 20-21 periods. However, in many communities, microtransit is considered as an add-on to existing bus networks. According to a KPMG study, when properly designed and executed, flexible microtransit services can help eliminate transit deserts, create first- and last-mile connections to transportation hubs, and provide convenient paratransit — all while getting people out of privately driven vehicles.

Microtransit might be able to meet coverage goals in areas that cannot support regular service in those areas not connected to fixed route systems at transit hubs. It could also serve as a tool to evaluate demand for expanded fixed route service hours or coverage.

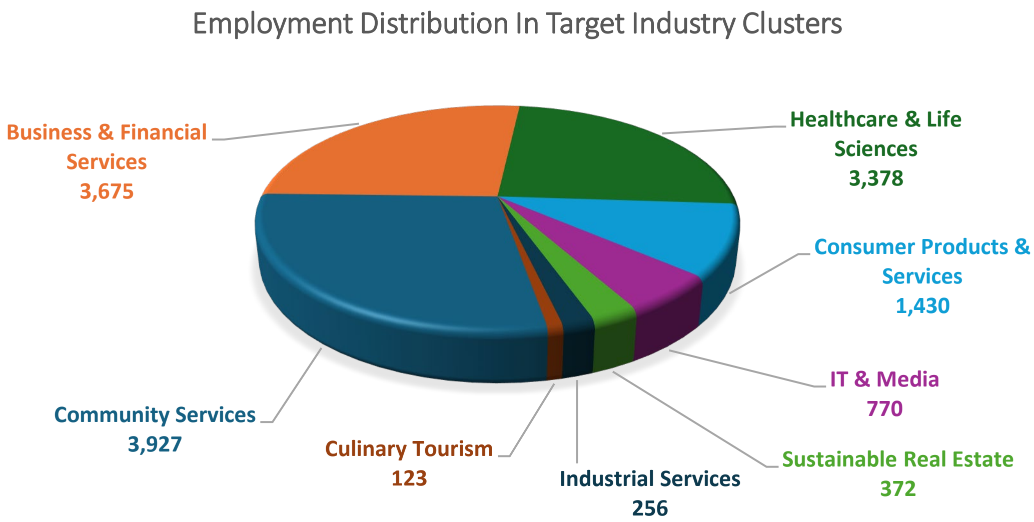
Additionally, the implementation of water taxis has proven to be a successful mobility option in waterfront locations throughout the world. UBER has recently started a water service ferry system on the Thames River in London (Uber Boat) which is transforming the tourism industry and provides commuter opportunities previously unattainable. In New York City, a private ferry company (NY Waterways) serves over 18,000 passengers daily in 23 routes and 32 vessels. Major US cities with water mobility transportation systems include:

- Alexandria, VA
- Annapolis, MD
- Baltimore, MD
- Boston, MA
- Charleston, SC
- Erie, PA
- Fort Lauderdale, FL
- Jacksonville, FL
- Long Beach, CA
- New York City, NY
- New Orleans, LA
- Oklahoma City, OK
- Orlando, FL
- Pittsburgh, PA
- Portland, ME
- Quad Cities, IL/IA
- Sacramento, CA
- San Francisco, CA
- Seattle, WA

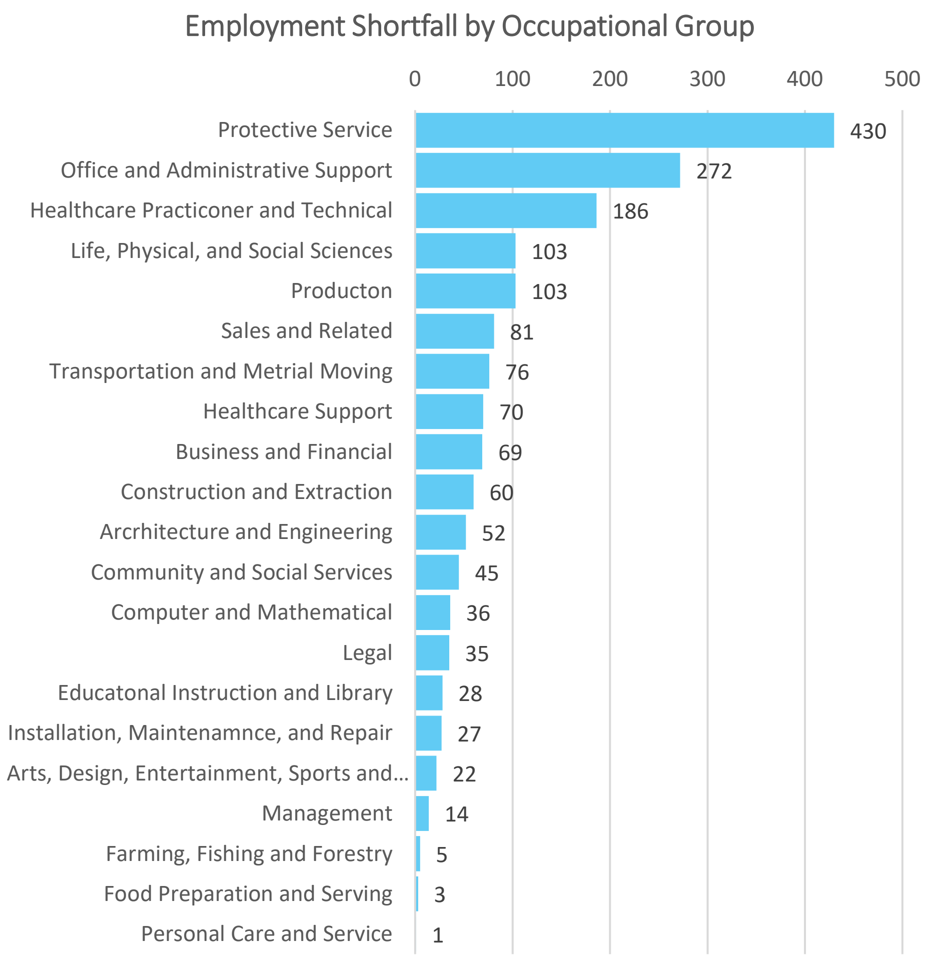
Given Cape Coral's extensive road and canal network, a serious examination of the potential of both land- and water-oriented micro transit systems should be considered.

WORKFORCE READINESS

While it is a worthwhile exercise to quantify the City's labor force by employer or resident, it is more important to recognize that prospective employers will hire from the entire region, notably the Cape Coral-Fort Myers Metropolitan Statistical Area (MSA). In preceding analysis, industries vital to the City were identified as being below-average employment performance and how many new jobs in those industries should be targeted to bring Cape Coral to at least a parity level with the State. In that review, a **13,640-person** gain is the focus in the eight target industry clusters. An illustration of employment distribution is shown in the chart below:



To identify job training requirements, a process has been developed where each 4-digit NAICS industry within the targeted clusters have the requisite occupations as provided by the Bureau of Labor Statistics (BLS) listed in descending order of occurrence in each industry. In total, the jobs shortfall for Cape Coral in the target clusters is **1,718** positions. The chart below summarizes the jobs shortfall picture by ranking of **21** major occupations groups:



Employer Survey Results

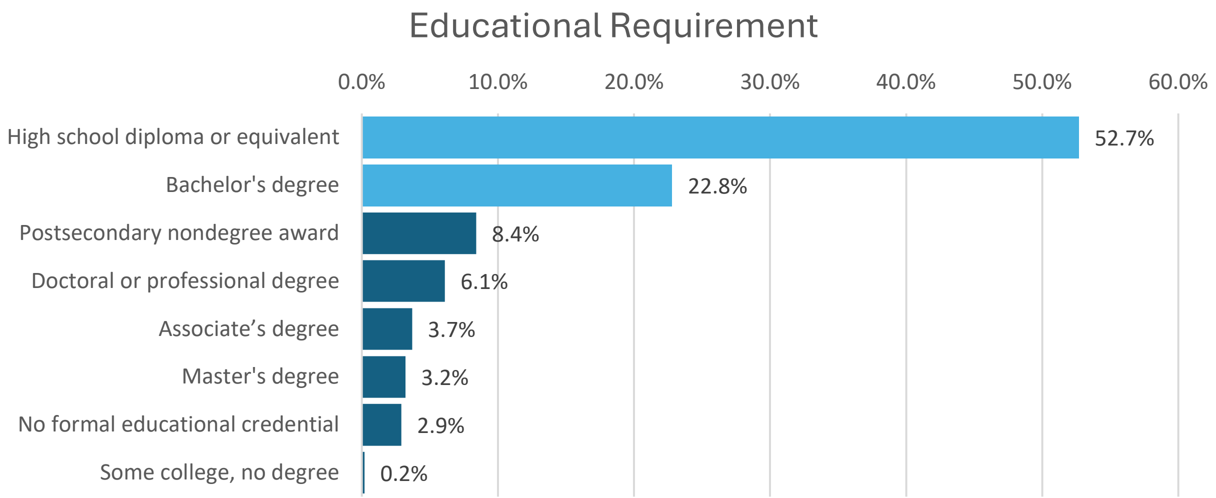
Arising from Employer Survey (discussed earlier), polling indicated that **35%** of employers felt that minor job training was needed for new hires. Most business owners (**53%**) felt that government-sponsored training might be of some possible value to their business. And, **56%** felt that hiring skilled workers was the most prevalent challenge. However, only **16%** remarked that subsidized training was needed.

The mixed picture of training being a need for businesses probably indicates that businesses are unaware of training opportunities. When asked if partnerships with local educational institutions would be important, an overwhelming **61%** said that such alliances could be valuable.

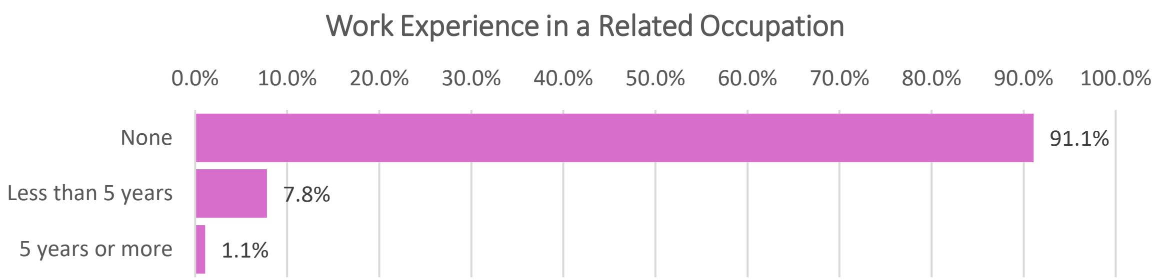
Target Industry Clusters

In total, the 1,718-job shortfall for the Cape Coral target clusters covers **202** occupations, with varying educational needs for entry, work experience in related occupation, and on-the-job training requirements. The top 20-ranked fields cover **1,083** jobs or **64%** of the total shortfall.

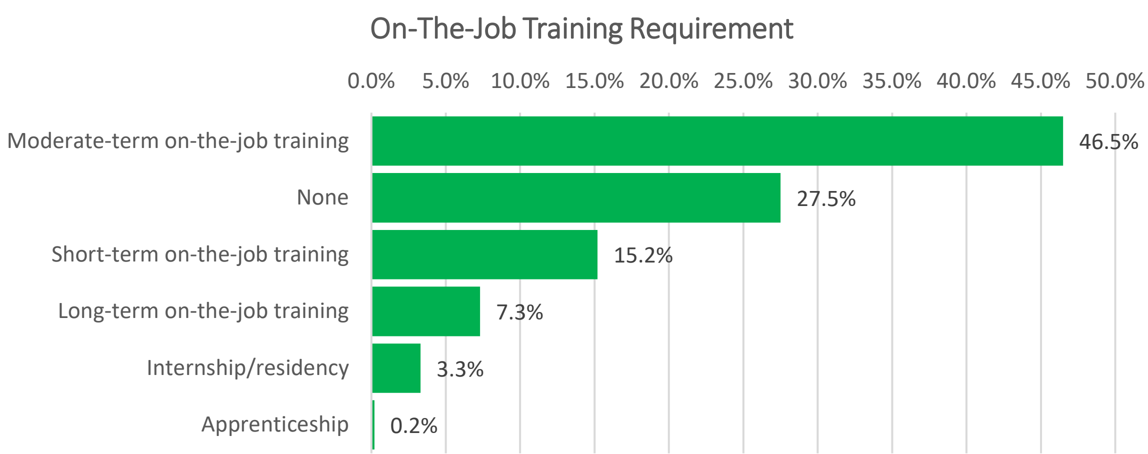
Of the 202 occupations, the following table denotes the educational requirements by total numbers of jobs. For most jobs **(75.5%)**, high school or bachelor's degrees are the most prevalent workforce requirements:



For the question of work experience in related fields, there would appear to be no overwhelming need:



On-the-job training requirements indicate that little to moderate training is the standard (**89%**):



From this analysis, it can be deduced that there are no overarching educational or training demands for the types of jobs that Cape Coral should be pursuing to meet the target industry clusters employment objectives.

Missing as Non-Reported in MSA

The BLS reports job totals if present in a marketplace. For this analysis those occupations in the shortfall list that are not shown by BLS as occurring have been denoted. In the Cape Coral-Fort Myers MSA, there are **131** occupations in the 202 occupations shortfall list that are not present in the MSA, which is a total of **657** jobs. These missing figures represent **38%** of the job total and **65%** of the occupations.

As educational attainment is the primary qualifier for these positions, the following summarizes the four levels of college attainment impacts:

- The highest requirement of Doctoral or professional degree and ranked by numbers of missing jobs. For this category, **84** jobs in **17** occupations are missing from the MSA
- For the 2nd level requirements of Master's degrees, there are **10** occupations totaling **31** jobs that are unavailable
- For the 3rd level requirements of Bachelor's degrees, , there are **28** occupations totaling **126** jobs that need filling.
- In the 4th level requirements of Associates' degrees, there are **10** occupations totaling **35** jobs that not fillable

The observable result of this evaluation is that the MSA and likely Cape Coral in particular are weak in the depth of professional and technical personnel available to be utilized by the target industries and clusters.

BLS and State of Florida Growth Occupations

Both the Bureau of Labor Statistics (BLS) and the State of Florida project employment for ten-year periods. The Employment Projections (EP) from each source provides the list of fastest-growing occupations. From these sources, **37** distinct fast-growing occupations have been identified from BLS on the national scale. the State of Florida, and the Southwest Florida Region:

Nationally, the five fastest-growing occupations are:

Occupation	Educational Requirement
Wind turbine service technicians	Postsecondary nondegree award
Nurse practitioners	Master's degree
Data scientists	Bachelor's degree
Statisticians	Master's degree
Information security analysts	Bachelor's degree

For Statewide, The **5** fastest-growing occupations are:

Occupation	Educational Requirement
Nurse practitioners	Master's degree
Data scientists	Bachelor's degree
Physician assistants	Master's degree
Information security analysts	Bachelor's degree
Machine feeders and offbearers	No formal educational credential

For the southwest FL region, The **5** fastest-growing occupations are:

Occupation	Educational Requirement
Nurse practitioners	Master's degree
Logisticians	Bachelor's degree
Medical and health services managers	Bachelor's degree
Market research analysts & marketing specialists	Bachelor's degree
Industrial machinery mechanics	High school diploma or equivalent

Crosswalk of the Fastest Growing Occupations and Target Clusters Shortfall Jobs

Exhibit 8 (below) compares the Fastest-growing occupations against the Target clusters shortfall jobs to determine commonalities and exceptions that could influence workforce training. The table summarizes the job descriptions with the number of shortfall jobs appearing in the last column.

Exhibit 8 – Crosswalk of Fastest Growing Occupations and Target Clusters Jobs Shortfall		
Fast-Growing Occupations	Target Clusters Jobs Shortfall	# of Shortfall Jobs
	Protective Service	430
	Office and Administrative Support	272
Healthcare Practitioner and Technical	Healthcare Practitioner and Technical	186
Life, Physical, and Social Sciences	Life, Physical, and Social Sciences	103
	Production	103
	Sales and Related	81
Transportation and Material Moving	Transportation and Material Moving	76
Healthcare Support	Healthcare Support	70
Business and Financial	Business and Financial	69
Construction and Extraction	Construction and Extraction	60
	Architecture and Engineering	52
Community and Social Services	Community and Social Services	45
Computer and Mathematical	Computer and Mathematical	36
	Legal	35
Educational Instruction and Library	Educational Instruction and Library	28
Installation, Maintenance, and Repair	Installation, Maintenance, and Repair	27
	Arts, Design, Entertainment, Sports, and Media	22
Management	Management	14
	Farming, Fishing and Forestry	5
Food Preparation and Serving	Food Preparation and Serving	3
Personal Care and Service	Personal Care and Service	1
Total jobs shortfall		1,718

From the above exhibit, there are **13** matches in occupational groups as follows:

- Healthcare Practitioner and Technical
- Life, Physical, and Social Sciences
- Transportation and Material Moving
- Healthcare Support
- Business and Financial
- Construction and Extraction

- Community and Social Services
- Computer and Mathematical
- Educational Instruction and Library
- Installation, Maintenance, and Repair
- Management
- Food Preparation and Serving
- Personal Care and Service

Conversely, there are **6** occupational groups that do not match the fastest-growing categories:

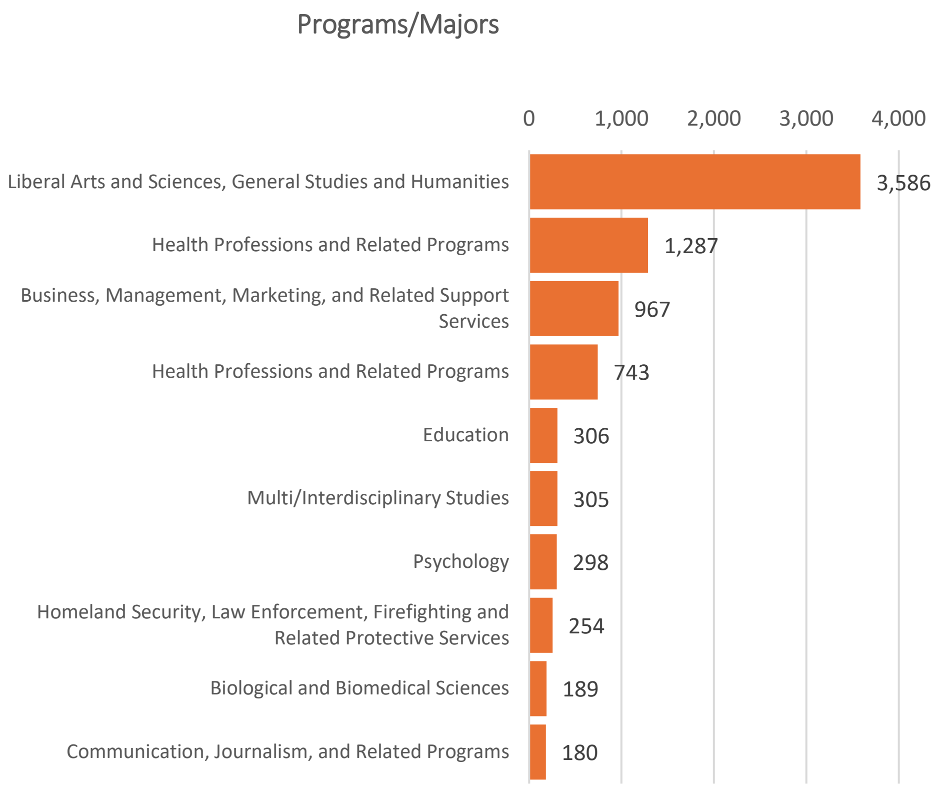
- Protective Service
- Office and Administrative Support
- Architecture and Engineering
- Legal
- Arts, Design, Entertainment, Sports, and Media
- Farming, Fishing and Forestry

From this analysis, it can be concluded that higher educational institutions are likely to be aware of the fastest-growing occupations and training is being adequately addressed in these areas. For the areas of mismatch, however, curriculum adjustments may not be that simple.

The Role of Higher Education Institutions

The forecasted shortfall of jobs in matched categories could be met by examination of current programs/majors and adding courses as necessary to fulfill these job growth requirements. It would be prudent to encourage the OEBD to share the shortfall list of 1,718 jobs in 202 occupations with the area colleges so that this correction be undertaken.

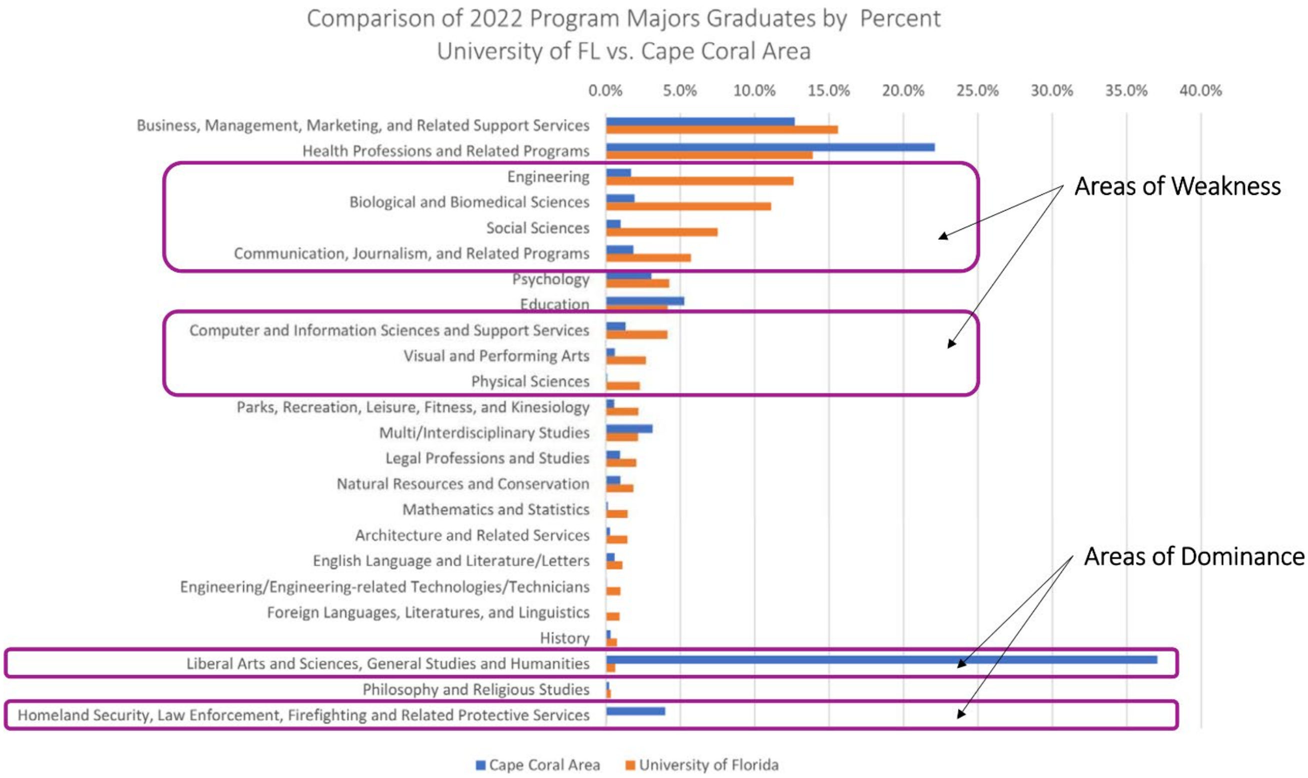
Colleges within fifty miles of Cape Coral granted **12,891** degrees in 2022. The **10** most popular programs/majors for the Cape Coral instructions are shown in the chart following:



For the areas of mismatch, it is apparent that adequate attention needs to be applied in the areas of architecture / engineering, legal, and visual/performing arts. This conclusion is reinforced by a comparison of Cape Coral area intuitions versus the University of Florida. In that evaluation, key areas of weakness we noted in the following areas:

- Engineering
- Biological and biomedical sciences
- Social sciences
- Communication, journalism, and related Programs
- Computer and information sciences and support services
- Visual and performing arts
- Physical sciences

The chart below illustrates these conditions:



For Architecture and Engineering, the most sought-after degree is the Bachelor's degree. In Legal, it is the Doctoral/ or Professional. And, in Arts, Design, Entertainment, Sports and Media, it is again the Bachelor's degree.

These 4 year-plus educational commitments might suggest the need for new university or college in Cape Coral. While this is a noble undertaking, it may not be necessary as online learning has become universally accepted over brick-and-mortar requirements. US News and World Report annually publishes a ranking of the "best" online bachelor's degrees . The **10** leading schools on the 2024 list are as follows:

- University of Buffalo-SUNY (1st)
- University of Florida (2nd)
- University of Illinois-Chicago (3rd)
- Arizona State University (tied for 4th)

- North Carolina State University (tied for 4th)
- Oregon State University (tied for 4th)
- Ohio State University (tied for 7th)
- Texas A&M University (tied for 7th)
- University of Central Florida (tied for 7th)
- University of North Carolina-Charlotte (tied for 7th)

Given that there are two Florida colleges on this list, the opportunity for online study is quite adequate for nearly all job requirements for the shortfall list. It is estimated the University of Florida's (UF) Online program has graduated over **4,000** students since the 2021–2022 academic year. Other institutions also offer associate and certificate degrees and awards that are suitable for those shortfall positions requiring such credentials.

Accordingly, unless there is a compelling reason to construct a new college in Cape Coral, there does not appear to be any immediate need. A better idea would be to promote online learning as a cost-effective and reasonable alternative to expensive college education for working families.

Conclusions

To reach the target goal of 13,640 new jobs in Cape Coral, recruitment from outside of the region is inevitable. While the capture of some portion of the 58,000 workers who leave the City each day, there is still a shortfall of 1,718 jobs. Some of these can be made up by enhancing graduation levels at local colleges and universities within the Cape Coral area or by online education. Other efforts such as business incubation and upskilling will prove effective. But there are occupations that simply are not present in the Cape-Coral-Fort Myers MSA that may need to be recruited until the labor force is more organically expanded through the education system.

OEBD should be aware of the shortfall jobs forecasted in this study can be addressed by active promotion regionally and nationally. A concerted effort should be made to seek professionals and specialists to consider Cape Coral as a new place to live, work and recreate. Attracting professional talent to a city is essential for economic growth and community vibrancy.

APPENDICES

Target Industry Clusters Prospectuses:

- Business & Financial Services
- Community Services
- Consumer Products & Services
- Culinary Tourism
- Healthcare & Life Sciences
- Industrial Services
- It & Media
- Sustainable Real Estate

INDUSTRY PROSPECTUS

Competitive Advantages for the Business & Financial Services Cluster in the City of Cape Coral

City of Cape Coral
Office of Economic & Business Development

This cluster illustrates the regional growth of professional and business services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

December 2024

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Key Findings

- As part of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Business & Financial Services Cluster.

- The Business & Financial Services Cluster consists of **8** industry components:
  - Banking, Credit, & Investment services
  - Business support services
  - Employment services
  - Facilities support services
  - Investigation and security services
  - Legal services
  - Management, scientific, and technical consulting services
  - Office administrative services

- Revenue (in current dollars) for the Business & Financial Services Cluster is **$4,010.1 billion**. Growth expectations in the next five years will raise this figure to **$5,033.4 billion**, which is a **4.65%** compound annual growth rate (CAGR), or an overall **25.5%** revenue gain.

- The **8** individual industries that comprise the cluster have projected revenue gains ranging from **54.0%** (Business support services) to **13.9%** (Legal services). In aggregate, the cluster demonstrates solid revenue growth for the next several years.

- Florida ranks in **3rd** place for Business & Financial Services Cluster employment among the **10** leading US states.

- The Cluster has a projected **3,675** new jobs in Cape Coral supportable by the labor market.

- There are **6** Florida cities identified as direct competitors to Cape Coral:
  - Fort Lauderdale
  - Orlando
  - Palm Bay
  - Pompano Beach

  - Port St. Lucie
  - West Palm Beach

- As an example of typical Cluster business, a Busines-to-Business (B2B) Telephone Call Center of **43** persons in Cape Coral will generate **$4.86 million** in annual revenue.

- Profitability for a B2B Call Center in Cape Coral is **17.8%** which leads all competition, other than Port St. Lucie.

- Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" office facilities that can capture some of this worker flow.

- With the projected office census of **3,675** new jobs, it can be expected that at least **735,000 sf** of new office space will be required to meet the Cluster's employment needs.

Introduction

As part of the development of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Business & Financial Services Cluster.

As defined by Harvard University, "a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support.

The Business & Financial Services Cluster illustrates the regional growth of professional and business services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments, capitalizing on untapped labor markets, with good market access to multiple urban centers.

The Cluster consists of **8** industry components:

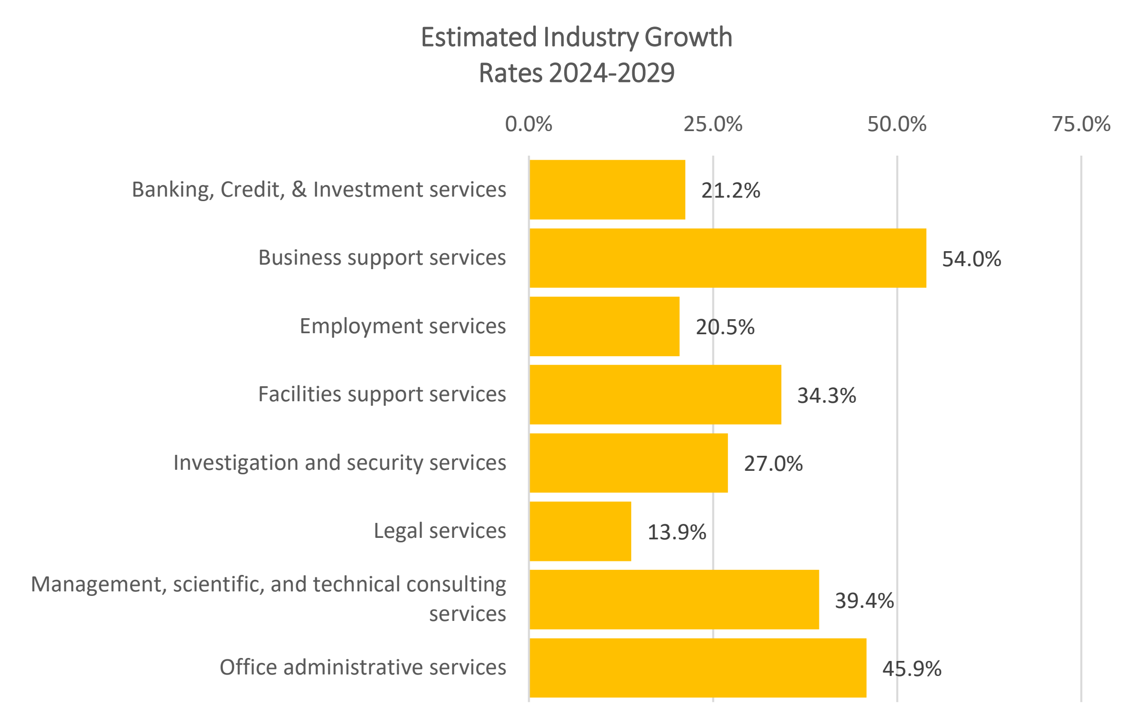
- Banking, Credit, & Investment services
- Business support services
- Employment services
- Facilities support services
- Investigation and security services
- Legal services
- Management, scientific, and technical consulting services
- Office administrative services

Industries Performances

Revenue (in current dollars) for the Business & Financial Services Cluster is **$4,010.1 billion**. Growth expectations in the next five years will raise this figure to **$5,033.4 billion**, which is a **4.65%** compound annual growth rate (CAGR), or an overall **25.5%** revenue gain.

The **8** individual industries that comprise the cluster have projected revenue gains ranging from **54.0%** (Business support services) to **13.9%** (Legal services). In aggregate, the cluster demonstrates solid revenue growth for the next several years. Refer to Exhibit 1 (below).

Exhibit 1 – Industry Performance Projections 2024-2029



In the following Exhibit 2, each of the component industries are presented with their individual revenue growth expectations, employee productivity evaluation and typical establishment size.

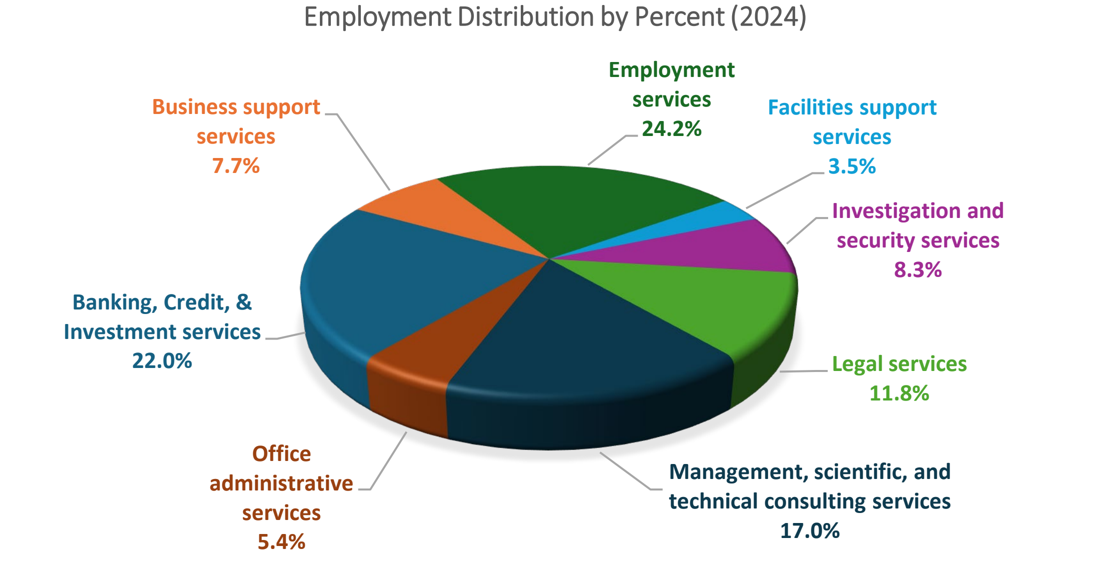
Exhibit 2 – Component Industries Data Aggregation

Banking & Credit Services			Business support services		
	2024	2029		2024	2029
Revenue ($ billion)	$2,221.1	$2,693.0	Revenue ($ billion)	$194.2	$299.0
CAGR	3.93%		CAGR	9.01%	
Revenue Gain ($ billion)	$471.86		Revenue Gain ($ billion)	$104.77	
Revenue Gain (percent)	21.2%		Revenue Gain (percent)	54.0%	
Revenue per employee	$734,098		Revenue per employee	$278,332	
Typ. Estb. Size (US)	13		Typ. Estb. Size (US)	11	
Employment services			**Facilities support services**		
	2024	2029		2024	2029
Revenue ($ billion)	$330.6	$398.3	Revenue ($ billion)	$66.6	$89.4
CAGR	3.80%		CAGR	6.07%	
Revenue Gain ($ billion)	$67.70		Revenue Gain ($ billion)	$22.81	
Revenue Gain (percent)	20.5%		Revenue Gain (percent)	34.3%	
Revenue per employee	$99,774		Revenue per employee	$132,950	

Typ. Estb. Size (US)	21		Typ. Estb. Size (US)	12	
Investigation and security services			Legal services		
	2024	2029		2024	2029
Revenue ($ billion)	$169.7	$215.6	Revenue ($ billion)	$398.2	$453.6
CAGR	4.90%		CAGR	2.64%	
Revenue Gain ($ billion)	$45.86		Revenue Gain ($ billion)	$55.38	
Revenue Gain (percent)	27.0%		Revenue Gain (percent)	13.9%	
Revenue per employee	$167,237		Revenue per employee	$337,529	
Typ. Estb. Size (US)	26		Typ. Estb. Size (US)	6	
Management, scientific, and technical consulting services			Office administrative services		
	2024	2029		2024	2029
Revenue ($ billion)	$525.3	$732.2	Revenue ($ billion)	$104.4	$152.3
CAGR	6.87%		CAGR	7.84%	
Revenue Gain ($ billion)	$206.90		Revenue Gain ($ billion)	$47.88	
Revenue Gain (percent)	39.4%		Revenue Gain (percent)	45.9%	
Revenue per employee	$286,939		Revenue per employee	$170,502	
Typ. Estb. Size (US)	4		Typ. Estb. Size (US)	7	

The distribution of employment in the Business & Financial Services Cluster is illustrated in Exhibit 3 (below):

Exhibit 3 – US Employment Distribution in the Business & Financial Services Cluster



For a Florida location, the **3rd** place ranking for Business & Financial Services Cluster employment among the **10** leading states is a favorable condition as shown in Exhibit 4 (below):

Exhibit 4 – Ten Leading States for Business & Financial Services Cluster Employment

State	2024 Employment	Rank
California	1,356,872	1
Texas	1,263,394	2
Florida	**948,119**	**3**
New York	870,027	4
Illinois	579,553	5
North Carolina	452,023	6
Georgia	420,961	7
Pennsylvania	400,141	8
New Jersey	386,868	9
Ohio	366,371	10

The Fit for Cape Coral

As part of an Economic Development Strategic Plan for Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Business & Financial Services Cluster. The Cluster contains the **8** component business areas that have a projected **3,675** new jobs supportable by the Cape Coral labor market, as shown in Exhibit 5 (below):

Exhibit 5 - Business & Financial Services Cluster Employment	
Industry	# of New Jobs
Banking, Credit, & Investment services	993
Business support services	359
Employment services	1,476
Facilities support services	156
Investigation and security services	142
Legal services	222
Management, scientific, and technical consulting services	274
Office administrative services	53
Total	**3,675**

For exploratory purposes, the Business Support Services industry has been selected for deeper examination. For this industry category, there is projected growth of **359** new jobs. Within this heading are **6** sub-categories of industries one of which will be explored in greater detail.

- Document Preparation Services
- Telephone Call Centers
- Business Service Centers
- Collection Agencies
- Credit Bureaus
- Other Business Support Services

Business-to-Business (B2B) Telephone Call Centers

This U.S. industry comprises establishments primarily engaged in operating call centers that initiate or receive communications via telephone, facsimile, email, or other communication modes for purposes such as: (1) promoting products or services, (2) taking orders, (3) soliciting contributions, and (4) providing information or assistance regarding products or services. Telemarketing bureaus and other contact centers provide these services on behalf of clients and do not own the products or provide the services that they are representing, or they serve other establishments of the same enterprise.

Model Operations

The national average size for a Business-to-Business (B2B) Call Center facility is **36** persons, and the State of Florida's is **50** persons. A nominal (averaged) facility size of **43** persons is selected as a Cape Coral model for this industry. Average productivity output is **$278,300** per employee, resulting in an annual sales figure of $**11.967 million**. Total investment per employee is estimated at **$30,200** per employee. Exhibit 6 (below) shows the operations details:

Exhibit 6 – Typical B2B Call Center Facility Operations	
Annual Net sales	$11,966,900
Total Employment	43
Avg. hourly Wage	$22.08
Fringe benefits Percentage	35%
Total Payroll	$2,665,600
Facility Footprint sq. ft.	7,710
Employee Occupancy/sf	180
Floor-Area-Ratio	0.37
Facility Construction Cost/sq. ft.	$119
Facility Construction Cost	$920,000
Estimated Furniture, Fixtures & Equipment Cost	$240,000
Site Acreage	0.5
Land Cost	$140,000
Total Investment	**$1,300,000**

Staffing

Employment distribution among the relevant major occupational groups for the industry are shown in Exhibit 7 (below):

Exhibit 7- B2B Call Center – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
General and Operations Managers	2	$62.84	$56.48
Training and Development Specialists	1	$33.64	$32.65
Business Operations Specialists, All Other	1	$41.40	$36.78
Computer User Support Specialists	1	$28.02	$28.50
Counter and Rental Clerks	1	$18.43	$18.13
Sales Representatives of Services	2	$35.11	$30.80
Telemarketers	4	$17.16	$16.67
First-Line Supervisors of Office and Administrative Support Workers	3	$32.03	$32.17
Bill and Account Collectors	4	$21.29	$21.01
Customer Service Representatives	21	$19.64	$19.27
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1	$20.60	$20.37
Mail Clerks and Mail Machine Operators, Except Postal Service	1	$17.41	$16.39
Office Clerks, General	1	$20.66	$21.00
Total	**43**		
Average Hourly Wage		**$24.15**	**$23.26**

Labor Capability

Available labor is calculated by using both the current unemployment rate (U3) for the Cape Coral-Fort Myers MSA and the factored under-employment rate[1] (U6) from the Bureau of Labor Statistics. For the target of **359** new jobs for the industry sector, the Employee Census table from above is revisited with the overall new job requirements shown in Exhibit 8 (below).

[1] U6: Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

Exhibit 8 - B2B Call Centers – Occupations Needed	
Occupation	# of new jobs
Customer Service Representatives	182
Telemarketers	41
Bill and Account Collectors	35
First-Line Supervisors of Office and Administrative Support Workers	24
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	16
General and Operations Managers	14
Office Clerks, General	9
Counter and Rental Clerks	8
Computer User Support Specialists	8
Mail Clerks and Mail Machine Operators, Except Postal Service	7
Training and Development Specialists	6
Business Operations Specialists, All Other	5
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	5
Total Occupations Required	**359**

In the following, the **13** categories of staffing for B2B Call Centers are evaluated for direct hiring capabilities:

Customer Service Representatives

In the Cape Coral-Fort Myers MSA, there are currently **7,620** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **529** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Telemarketers

In the MSA, there are currently **170** persons employed in this position. It is estimated that there are approximately **12** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

Bill and Account Collectors

In the MSA, there are currently **210** persons employed in this position. It is estimated that there are approximately **15** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

First-Line Supervisors of Office and Administrative Support Workers
In the MSA, there are currently **2,950** persons employed in this position. It is estimated that there are approximately **205** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel
In the MSA, there are currently **3,600** persons employed in this position. It is estimated that there are approximately **250** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

General and Operations Managers
In the MSA, there are currently **6,110** persons employed in this position. It is estimated that there are approximately **425** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Office Clerks, General
In the MSA, there are currently **5,850** persons employed in this position. It is estimated that there are approximately **407** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Counter and Rental Clerks
In the MSA, there are currently **1,180** persons employed in this position. It is estimated that there are approximately **82** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Computer User Support Specialists
In the MSA, there are currently **980** persons employed in this position. It is estimated that there are approximately **68** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Mail Clerks and Mail Machine Operators, Except Postal Service
In the MSA, there are currently **120** persons employed in this position It is estimated that there are approximately **8** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Training and Development Specialists
In the MSA, there are currently **610** persons employed in this position. It is estimated that there are approximately **42** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Business Operations Specialists, All Other

In the MSA, there are currently **1,310** persons employed in this position. It is estimated that there are approximately **91** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Secretaries and Administrative Assistants, Except Legal, Medical, and Executive

In the MSA, there are currently **2,810** persons employed in this position. It is estimated that there are approximately **195** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, staffing for a B2B operation in Cape Coral is projected to be quite achievable. However, the positions that exhibit shortfall for B2B Call Centers are:

- Telemarketers
- Bill and Account Collectors
- Mail Clerks and Mail Machine Operators, Except Postal Service

The economic development and workforce officials in Cape Coral have been alerted to these employment shortfall issues. New initiatives are in development that will increase labor availability in these three areas.

Comparison Analyses

The objective of this section is the determination of which Florida cities are Cape Coral's true competition, not just Fort Myers or another Southwest Florida community. To accomplish this evaluation, a review of **22** municipalities in Florida with a population of **100,000** or more was conducted. Through analysis of population growth for each of the as compared to annual rate for the State of Florida, **6** cities emerged as true competitors to Cape Coral:

- Fort Lauderdale
- Orlando
- Palm Bay
- Pompano Beach
- Port St. Lucie
- West Palm Beach

Profitability Determination

Base financial information is shown in Exhibit 9 (below):

Exhibit 9 - B2B Call Center – Competitive Evaluation – Base Financial Data

Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$140,000**	**$119**	**$1,160,000**	**$1,300,000**	**$1,040,000**	**$81,715**
Fort Lauderdale	$1,437,000	$683,000	$125	$1,202,000	$1,885,000	$1,508,000	$118,500
Orlando	$201,000	$96,000	$123	$1,188,000	$1,284,000	$1,027,200	$80,100
Palm Bay	$494,000	$235,000	$130	$1,243,000	$1,478,000	$1,182,400	$92,900
Pompano Beach	$2,057,000	$978,000	$125	$1,202,000	$2,180,000	$1,744,000	$137,000
Port St. Lucie	$146,000	$69,000	$121	$1,176,000	$1,245,000	$996,000	$78,300
West Palm Beach	$975,000	$464,000	$125	$1,202,000	$1,666,000	$1,332,800	$104,700

Profitability for a B2B Call Center in Cape Coral is **17.8%** which leads all competition, other than Port St. Lucie, as shown in Exhibit 10 (below):

Exhibit 10- B2B Call Centers – Competitive Evaluation – Annual Operating Profits							
Market	**Cape Coral**	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	**100.0%**	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Payroll	**23.5%**	25.1%	24.0%	24.1%	25.1%	22.7%	25.1%
Utilities & Fuels	**11.0%**	11.0%	11.0%	11.0%	11.0%	11.0%	11.0%
Debt Service	**0.7%**	1.0%	0.7%	0.8%	1.1%	0.7%	0.9%
Cost of goods sold	**35.2%**	37.1%	35.7%	35.8%	37.2%	34.4%	37.0%
Annual Gross profit	**64.8%**	62.9%	64.3%	64.2%	62.8%	65.6%	63.0%
Less: Sales exp.	**15.0%**	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
General & Administrative. Overhead	**32.0%**	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%
Total Operating expenses	**47.0%**	47.0%	47.0%	47.0%	47.0%	47.0%	47.0%
Annual Net Profit before taxes	**17.8%**	15.9%	17.3%	17.2%	15.8%	18.6%	16.0%

Summary

The Business & Financial Services Cluster illustrates the regional growth of professional and business services that will stimulate new office development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

Metrics for the Cluster and its component industries all indicate positive revenue growth for the next five years. The Cluster is essentially office space users, typical of White-Collar industries. White-Collar businesses are flourishing in Florida, due to several factors, including:

Business-friendly policies

Florida offers a favorable tax and business climate, including no state income tax.

Strong workforce

Florida's diverse economy and strong workforce support the labor force.

Proximity to markets

Florida's location near buyers, suppliers, labor, and transportation allows companies to cut costs and develop close relationships with the community.

For Cape Coral, operations such as B2B Call Centers will be profitable endeavors. The City and the MSA have a dynamic labor supply that is well suited to meet the needs of the Business & Financial Services Cluster.

Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" office facilities that can capture some of this worker flow.

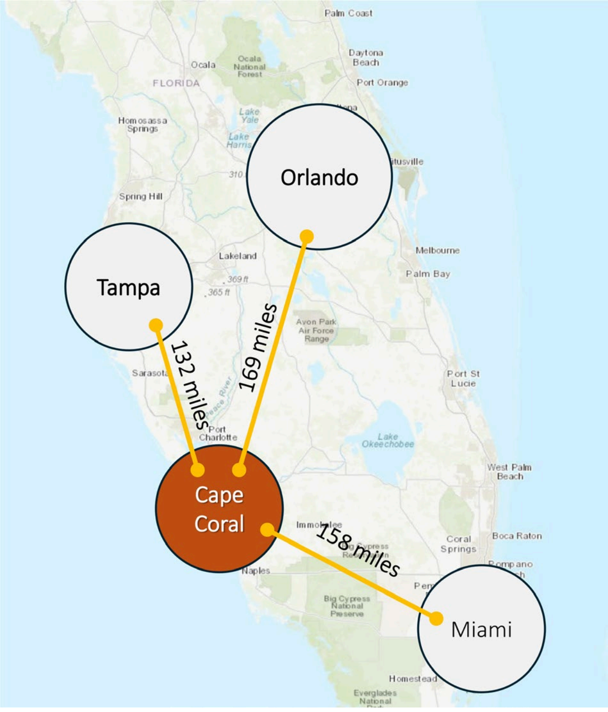
With the projected office census of **3,675** new jobs, it can be expected that at least **735,000 sf** of new office space will be required to meet the Cluster's employment needs.

Photo credit: Depositphotos

Competitive Advantages of the City of Cape Coral Location

Cape Coral is in Lee County in Southwest Florida and is the largest population component of the Cape Coral-Fort Myers Metropolitan Statistical Area. The City's location is about an equidistance from the major urban centers of Tampa, Miami, and Orlando.

Originally developed in the late 1950's as a "Waterfront Wonderland", Cape Coral was designed to bring the waterfront dream of home ownership to middle-income Americans. With its over 400 miles of salt and freshwater canals, Cape Coral is a unique community that is redefining its identity beyond being just a suburb of Fort Myers. The City was incorporated in 1970 and maintains a brisk growth pattern despite economic downturns, a pandemic, and severe weather disturbances.



Demographic Advantages

With a current population of approximately **217,000** people, Cape Coral is forecasted to grow to over **375,000** by 2050, representing a nearly **73%** increase. Cape Coral's explosive growth places it among the five fastest growing communities in the nation, measuring more than twice that of the State of Florida.

While more retirees are expected, the City is experiencing a dynamic growth in the working age groups of **25-44 yrs**. By 2029, an overall population gain of about **20,000** new residents will result in **34%** increase in working aged people.

Demographic and market advantages include:

- Growth rate exceeding the State's
- Dynamic growth rate among 25-44 yr. old residents
- Above average number of executive-age workers

- Exemplary rate of English language proficiency
- Above average household size
- Above average median household income
- Above average home ownership rate
- Below average cost of living rate
- Above average good/services industries employment
- Below average services industries hourly wages
- Above average worker mobility patterns
- Below average commercial and industrial electric rates

Higher Education Resources

There are **9** four-year colleges and universities within **50** miles of Cape Coral. In 2022, **9,933** degrees were conferred by the following institutions:

- Florida Gulf Coast University (Fort Myers)
- Florida SouthWestern State College (Fort Myers)
- Southern Technical College (Fort Myers)
- Hodges University (Fort Myers)
- Keiser University-Ft Myers (Fort Myers)
- Rasmussen University-Fort Myers (Fort Myers)
- Ave Maria School of Law (Naples)
- Ave Maria University (Ave Maria)

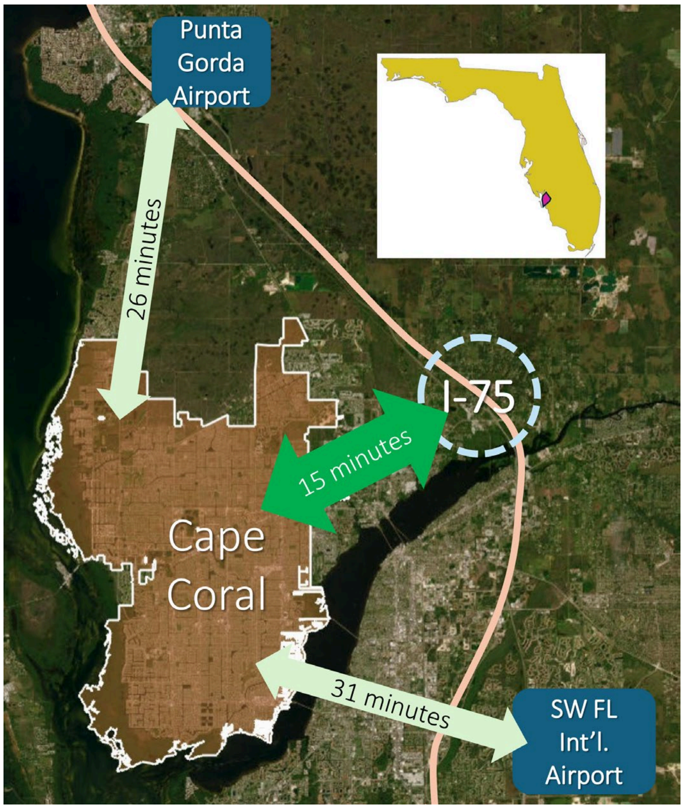
The five most sought after fields of study are:

1. Business, Management, Marketing, and Related Support Services
2. Health Professions and Related Programs
3. Education
4. Multi/Interdisciplinary Studies
5. Psychology

Market Potential

Cape Coral's southwest Florida location can not only cover the total Florida market but a significant portion of the US. Within a 300-mile travel distance (one day truck routing), about **6.1%** of the nation can be reached.

Highway Travel



Interstate 75 (I-75) is within **15 minutes**' drive from Cape Coral. Access to the interstate can be achieved to the eastern direction in North Fort Myers or via one of the bridges through downtown Fort Myers. To the north, access is available in Punta Gorda at a slightly longer travel time.

Air Travel

There are two airports that serve Cape Coral. Southwest Florida International Airport (RSW) is a major facility providing domestic and international flights daily. Travel to RSW is within **31 minutes** from downtown Cape Coral. RSW serves **10.1 million** passengers annually. In 2023, RSW had **87,685** aircraft operations.

Punta Gorda Airport (PGD) in Charlotte County just north of Cape Coral is a regional facility providing domestic flights mainly to the Midwest (Allegiant Air). PGD serves about **1.9 million** passengers per year and had **103,252** aircraft operations in 2023.

Rail Service

Passenger rail service via Amtrak is available in Fort Myers. The system operates **77** daily scheduled trips. Travel from downtown to Fort Myers Station Cape Coral is about **31 minutes**.

Freight rail services are provided by the Seminole Gulf Railway (SGLR). SGLR is a short line freight and passenger excursion railroad headquartered in Fort Myers that operates two former CSX Transportation railroad lines in Southwest Florida.

Bus Service

LeeTran operates bus services in Cape Coral. Currently there are **5** fixed bus routes but expanded services are under development. Looped routes provide transit to and from Fort Myers. The new Ultra On Demand micro-mobility fleet will enhance bus transit capabilities throughout the City.

Lifestyle & Recreational

Cape Coral's riverfront location and unique canal system offer a recreation-oriented lifestyle that has broad-range appeal. Some of the area's tourism advantages are as follows:

- Growing residential population, which can further encourage already existing strong category of visiting friends & family travelers
- Major home rental market for vacationers – over **4,000** homes and **350** private rooms available
- Numerous opportunities to rent a house and boat together, canals enhance rental properties
- Major hotel - Westin Resort at Marina Village – significant anchor for tourism activity
- Favorable location
- Proximity to airports, major highways, and neighboring tourist communities.
- One of safest cities in Florida
- Sports tourism – an already existing, active, and effective government involvement
- Increasingly strong restaurant and food scene
- Water activities – boating, dolphin tours, fishing, kayaking
- Winter warm weather destination
- Major League Baseball Spring Training nearby
- Active events schedule including festivals, parades, and concerts

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INDUSTRY PROSPECTUS

Competitive Advantages for the Community Services Cluster in the City of Cape Coral

City of Cape Coral
Office of Economic & Business Development

This cluster illustrates the regional growth of public support services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

December 2024

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Key Findings

- As part of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Community Services Cluster.
- The Community Services Cluster consists of **3** industry components:
  - Individual and family services
  - Community food and housing, and emergency and other relief services
  - Vocational rehabilitation services
- Revenue (in current dollars) for the Community Services Cluster is **$1,536.5 billion**. Growth expectations in the next five years will raise this figure to **$2,005.5 billion**, which is a **5.50%** compound annual growth rate (CAGR), or an overall **3.5%** revenue gain.
- The **3** individual industries that comprise the cluster have projected revenue gains ranging from **31.9%** (Vocational rehabilitation services) to **30.4%** (Individual and family services). In aggregate, the cluster demonstrates solid revenue growth for the next several years.
- Florida ranks in **8th** place for Community Services Cluster employment among the **10** leading US states.
- The Cluster has a projected **582** new jobs in Cape Coral supportable by the labor market.
- There are **6** Florida cities identified as direct competitors to Cape Coral:
  - Fort Lauderdale
  - Orlando
  - Palm Bay
  - Pompano Beach
  - Port St. Lucie
  - West Palm Beach

- As an example of typical Cluster business, a Vocational Rehabilitation Services facility of **19** persons in Cape Coral will generate **$2.349 million** in annual revenue.

- Profitability for a Vocational Rehabilitation Services Facility in Cape Coral is **5.8%** which leads all competition with the exception of Orlando.

- Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" facilities that can capture some of this worker flow.

- With the projected office census of **582** new jobs, it can be expected that at least **135,900 sf** of office space will be required to meet the Cluster's employment needs.

Introduction

As part of the development of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Community Services Cluster.

As defined by Harvard University, "a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support.

This cluster illustrates regional growth of public support services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

The Community Services Cluster consists of **3** industry components:

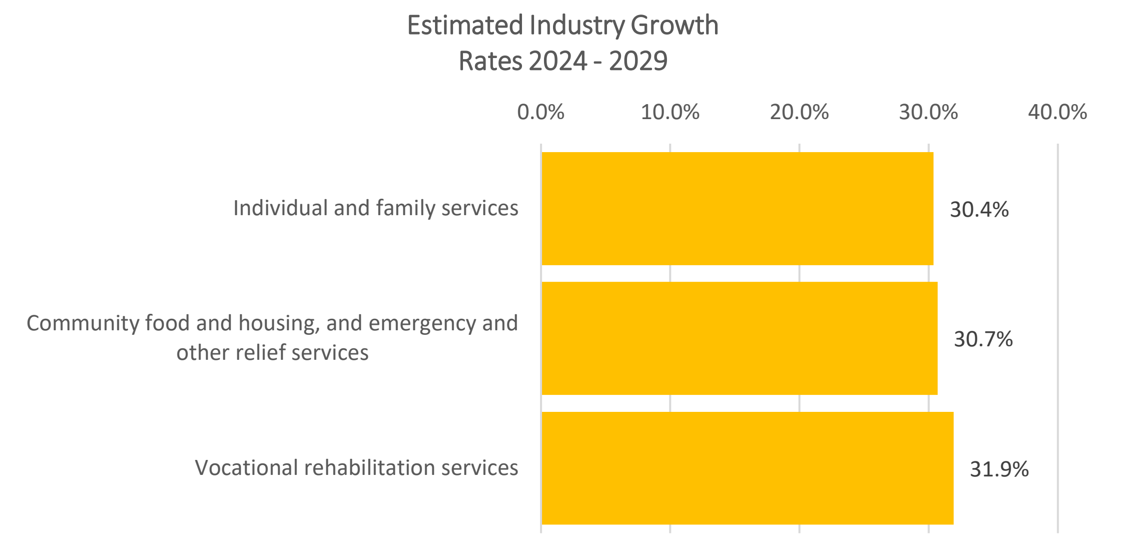
- Individual and family services
- Community food and housing, and emergency and other relief services
- Vocational rehabilitation services

Industries Performances

Revenue (in current dollars) for the Community Services Cluster is **$1,536.5 billion**. Growth expectations in the next five years will raise this figure to **$2,005.5 billion**, which is a **5.50%** compound annual growth rate (CAGR), or an overall **30.5%** revenue gain.

The **3** individual industries that comprise the cluster have projected revenue gains ranging from **31.9%** (Vocational rehabilitation services) to **30.4%** (Individual and family services). In aggregate, the cluster demonstrates solid revenue growth for the next several years. Refer to Exhibit 1 (below).

Exhibit 1 – Industry Performance Projections 2024-2029

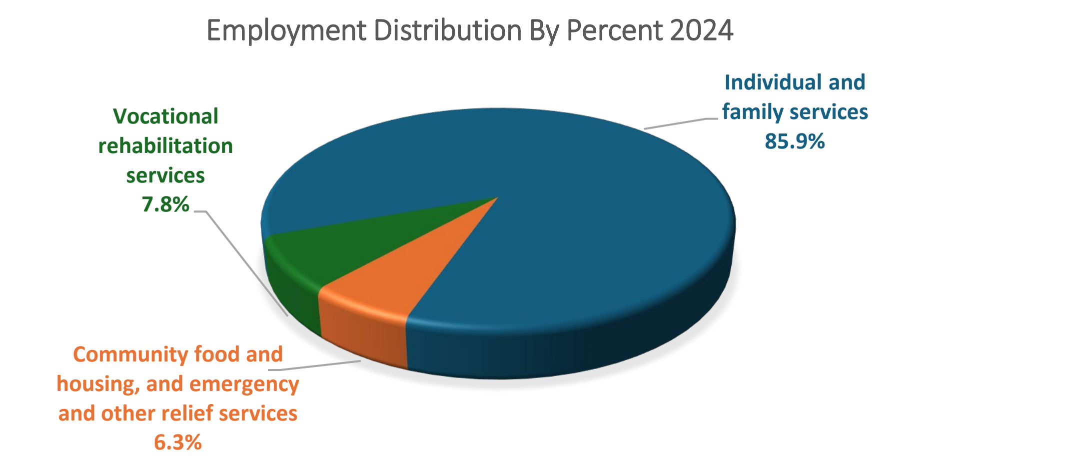


In the following Exhibit 2, each of the component industries are presented with their individual revenue growth expectations, employee productivity evaluation and typical establishment size.

Exhibit 2 – Component Industries Data Aggregation					
Individual and family services			Community food and housing, and emergency and other relief services		
	2024	2029		2024	2029
Revenue ($ billion)	$976.54	$1,273.28	Revenue ($ billion)	$525.16	$686.36
CAGR	5.45%		CAGR	5.50%	
Revenue Gain ($ billion)	$296.74		Revenue Gain ($ billion)	$161.20	
Revenue Gain (percent)	30.4%		Revenue Gain (percent)	30.7%	
Revenue per employee	$314,500		Revenue per employee	$2,303,500	
Typ. Estb. Size (US)	3		Typ. Estb. Size (US)	16	
Vocational rehabilitation services					
	2024	2029			
Revenue ($ billion)	$34.75	$45.85			
CAGR	5.70%				
Revenue Gain ($ billion)	$11.10				
Revenue Gain (percent)	31.9%				
Revenue per employee	$123,400				
Typ. Estb. Size (US)	29				

The distribution of employment in the Community Services Cluster is illustrated in Exhibit 3 (below):

Exhibit 3 – US Employment Distribution in the Community Services Cluster



For a Florida location, the **8th** place ranking for the Community Services Cluster employment among the **10** leading states is a favorable condition as shown in Exhibit 4 (below):

Exhibit 4 – Ten Leading States for the Community Services Cluster Employment		
State	2024 Employment	Rank
California	915,845	1
New York	356,400	2
Pennsylvania	222,080	3
Texas	159,212	4
Illinois	121,650	5
Massachusetts	117,546	6
Washington	115,094	7
Florida	95,723	8
Minnesota	94,652	9
Ohio	90,651	10

The Fit for Cape Coral

As part of an Economic Development Strategic Plan for Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Community Services Cluster. The Cluster contains the **3** component business areas that have a projected **582** new jobs supportable by the Cape Coral labor market, as shown in Exhibit 5 (below):

Exhibit 5 - Vocational Rehabilitation Services Cluster Employment	
Industry	# of New Jobs
Individual and family services	340
Community food and housing, and emergency and other relief services	100
Vocational rehabilitation services	142
Total	**582**

For exploratory purposes, the Vocational Rehabilitation Services industry has been selected for deeper examination. For this industry category, there is a projected the growth of **142** new jobs.

Vocational Rehabilitation Services

This industry comprises (1) establishments primarily engaged in providing vocational rehabilitation or habilitation services, such as job counseling, job training, and work experience, to unemployed and underemployed persons, persons with disabilities, and persons who have a job market disadvantage because of lack of education, job skill, or experience and (2) establishments primarily engaged in providing training and employment to persons with disabilities. Vocational rehabilitation job training facilities (except schools) and sheltered workshops (i.e., work experience centers) are included in this industry.

Model Operations

The national average size for a Vocational Rehabilitation Services facility is **22** persons, and the State of Florida's is **16** persons. A nominal facility size of **19** persons is selected as a Cape Coral model for this industry. Average productivity output for Vocational Rehabilitation Services is **$123,400** per employee, resulting in an annual sales figure of **$2.349 million**. Total investment per employee is estimated at **$53,400**, as shown in Exhibit 6 (below):

Exhibit 6 – Vocational Rehabilitation Services -- Typical Operations	
Annual Net sales	$2,349,300
Total Employment	19

Avg. hourly Wage	$31.86
Fringe benefits Percentage	35%
Total Payroll	$1,699,900
Facility Footprint sq. ft.	6,700
Employee Occupancy/sf	350
Floor-Area-Ratio	0.39
Facility Construction Cost/sq. ft.	$119
Facility Construction Cost	$800,000
Estimated Equipment Cost (annual carry)	$100,000
Site Acreage	0.4
Land Cost	$116,000
Total Investment	**$1,016,000**

Staffing

Employment distribution among the relevant major occupational groups for the industry is shown in Exhibit 7 (below):

Exhibit 7 – Vocational Rehabilitation Services Facility – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
General and Operations Managers	1	$62.84	$56.48
Business Operations Specialists, All Other	3	$41.40	$36.78
Computer User Support Specialists	1	$28.02	$28.50
Educational, Guidance, and Career Counselors and Advisors	8	$27.37	$30.38
Physician Assistants	1	$58.55	$61.74
Exercise Trainers and Group Fitness Instructors	1	$21.50	$22.28
Bookkeeping, Accounting, and Auditing Clerks	1	$22.98	$22.47
Receptionists and Information Clerks	1	$16.74	$16.98
Office and Administrative Support Workers, All Other	2	$21.17	$21.77
Total	**19**		
Average Hourly Wage		**$31.38**	**$31.86**

Labor Capability

Available labor is calculated by using both the current unemployment rate (U3) for the Cape Coral-Fort Myers MSA and the factored under-employment rate[1] (U6) from the Bureau of Labor Statistics. For the target of **142** new jobs for the industry sector, the Employee Census table from above is revisited with the overall new job requirements shown in Exhibit 8 (below).

Exhibit 8 - Vocational Rehabilitation Services – Occupations Needed	
Occupation	# of new jobs
General and Operations Managers	2
Business Operations Specialists, All Other	19
Computer User Support Specialists	3
Educational, Guidance, and Career Counselors and Advisors	76
Physician Assistants	4
Exercise Trainers and Group Fitness Instructors	11
Bookkeeping, Accounting, and Auditing Clerks	5
Receptionists and Information Clerks	9
Office and Administrative Support Workers, All Other	11
Total Occupations Required	**142**

In the following, the **9** categories of staffing for a Vocational Rehabilitation Services Facility are evaluated for direct hiring capabilities:

General and Operations Managers
In the Cape Coral-Fort Myers MSA, there are currently **6,110** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **425** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Business Operations Specialists, All Other
In the MSA, there are currently **1,310** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **91** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Computer User Support Specialists
In the MSA, there are currently **980** persons employed in this position. Using the U6 factor,

[1] U6: Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

it is estimated that there are approximately **68** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Educational, Guidance, and Career Counselors and Advisors

In the MSA, there are currently **450** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **31** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

Physician Assistants

In the MSA, there are currently **210** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **15** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Exercise Trainers and Group Fitness Instructors

In the MSA, there are currently **380** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **26** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Bookkeeping, Accounting, and Auditing Clerks

In the MSA, there are currently **3,370** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **234** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Receptionists and Information Clerks

In the MSA, there are currently **2,290** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **159** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Office and Administrative Support Workers, All Other

In the MSA, there are currently **530** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **37** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, staffing for a Vocational Rehabilitation Services Facility in Cape Coral is projected to be quite achievable. However, the position that exhibits a shortfall is:

- Educational, Guidance, and Career Counselors and Advisors

The economic development and workforce officials in Cape Coral have been alerted to this employment shortfall issue. New initiatives are in development that will increase labor availability in this area.

Comparison Analyses

The objective of this section is the determination of which Florida cities are Cape Coral's true competition, not just Fort Myers or another Southwest Florida community. To accomplish this evaluation, a review of **22** municipalities in Florida with a population of **100,000** or more was conducted. Through analysis of population growth for each of the as compared to annual rate for the State of Florida, **6** cities emerged as true competitors to Cape Coral:

- Fort Lauderdale
- Orlando
- Palm Bay
- Pompano Beach
- Port St. Lucie
- West Palm Beach

Profitability Determination

Base financial information is shown in Exhibit 9 (below):

Exhibit 9 - Vocational Rehabilitation Services – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$116,000**	**$91**	**$707,000**	**$823,000**	**$658,400**	**$54,700**
Fort Lauderdale	$1,437,000	$566,000	$95	$734,000	$1,300,000	$1,040,000	$81,700
Orlando	$201,000	$79,000	$93	$725,000	$804,000	$643,200	$50,500
Palm Bay	$494,000	$195,000	$99	$762,000	$957,000	$765,600	$60,200
Pompano Beach	$2,057,000	$810,000	$95	$734,000	$1,544,000	$1,235,200	$90,100
Port St. Lucie	$146,000	$58,000	$95	$740,000	$798,000	$638,400	$50,200
West Palm Beach	$975,000	$384,000	$92	$718,000	$1,102,000	$881,600	$69,300

Profitability for a Vocational Rehabilitation Services Facility in Cape Coral is **5.8%** which leads all competition with the exception of Orlando, as shown in Exhibit 10 (below):

Exhibit 10 - Vocational Rehabilitation Services – Competitive Evaluation – Annual Operating Profits

Market	Cape Coral	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Annual Net sales	**100.0%**	100.0%	100.0%	100.0 %	100.0%	100.0%	100.0%
Payroll (incl. benefits)	**72.4%**	73.9%	70.9%	70.9%	73.9%	71.1%	73.9%
Utilities & Fuels	**7.0%**	8.8%	7.6%	8.8%	8.8%	8.8%	8.8%
Debt Service	**2.3%**	3.5%	2.1%	2.6%	3.8%	2.1%	2.9%
Materials	**2.5%**	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%
Cost of goods sold	**84.2%**	88.7%	83.2%	84.7%	89.1%	84.5%	88.2%
Annual Gross profit	**15.8%**	11.3%	16.8%	15.3%	10.9%	15.5%	11.8%
Less: Sales exp.	**1.5%**	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
General & Administrative. Overhead	**8.5%**	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%
Total Operating expenses	**10.0%**	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
Annual Net Profit before taxes	**5.8%**	1.3%	6.8%	5.3%	0.9%	5.5%	1.8%

Summary

The Community Services Cluster illustrates the regional growth of public support services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

Metrics for the Cluster and its component industries all indicate positive revenue growth for the next five years. The Cluster is essentially office space users with varying occupancy characteristics. The Community Services industry is flourishing in Florida, partially due to the following advantages:

Business-friendly policies

Florida offers a favorable tax and business climate, including no state income tax.

Strong workforce

Florida's diverse economy and strong workforce support the labor force.

Proximity to markets

Florida's location near buyers, suppliers, labor, and transportation allows companies to cut costs and develop close relationships with the community.

For Cape Coral, operations such as a Vocational Rehabilitation Services will be profitable endeavors. The City and the MSA have a dynamic labor supply that is well suited to meet the needs of the Community Services Cluster.

Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" office facilities that can capture some of this worker flow.

With the projected office census of **582** new jobs, it can be expected that at least **135,900 sf** of office space will be required to meet the Cluster's employment needs.

Photo credit: Depositphotos

Competitive Advantages of the City of Cape Coral Location

Cape Coral is in Lee County in Southwest Florida and is the largest population component of the Cape Coral-Fort Myers Metropolitan Statistical Area. The City's location is about an equidistance from the major urban centers of Tampa, Miami, and Orlando.

Originally developed in the late 1950's as a "Waterfront Wonderland", Cape Coral was designed to bring the waterfront dream of home ownership to middle-income Americans. With its over 400 miles of salt and freshwater canals, Cape Coral is a unique community that is redefining its identity beyond being just a suburb of Fort Myers. The City was incorporated in 1970 and maintains a brisk growth pattern despite economic downturns, a pandemic, and severe weather disturbances.

Demographic Advantages

With a current population of approximately **217,000** people, Cape Coral is forecasted to grow to over **375,000** by 2050, representing a nearly **73%** increase. Cape Coral's explosive growth places it among the five fastest growing communities in the nation, measuring more than twice that of the State of Florida.

While more retirees are expected, the City is experiencing a dynamic growth in the working age groups of **25-44 yrs**. By 2029, an overall population gain of about **20,000** new residents will result in **34%** increase in working aged people.

Demographic and market advantages include:

- Growth rate exceeding the State's
- Dynamic growth rate among 25-44 yr. old residents
- Above average number of executive-age workers

- Exemplary rate of English language proficiency
- Above average household size
- Above average median household income
- Above average home ownership rate
- Below average cost of living rate
- Above average good/services industries employment
- Below average services industries hourly wages
- Above average worker mobility patterns
- Below average commercial and industrial electric rates

Higher Education Resources

There are **9** four-year colleges and universities within **50** miles of Cape Coral. In 2022, **9,933** degrees were conferred by the following institutions:

- Florida Gulf Coast University (Fort Myers)
- Florida SouthWestern State College (Fort Myers)
- Southern Technical College (Fort Myers)
- Hodges University (Fort Myers)
- Keiser University-Ft Myers (Fort Myers)
- Rasmussen University-Fort Myers (Fort Myers)
- Ave Maria School of Law (Naples)
- Ave Maria University (Ave Maria)

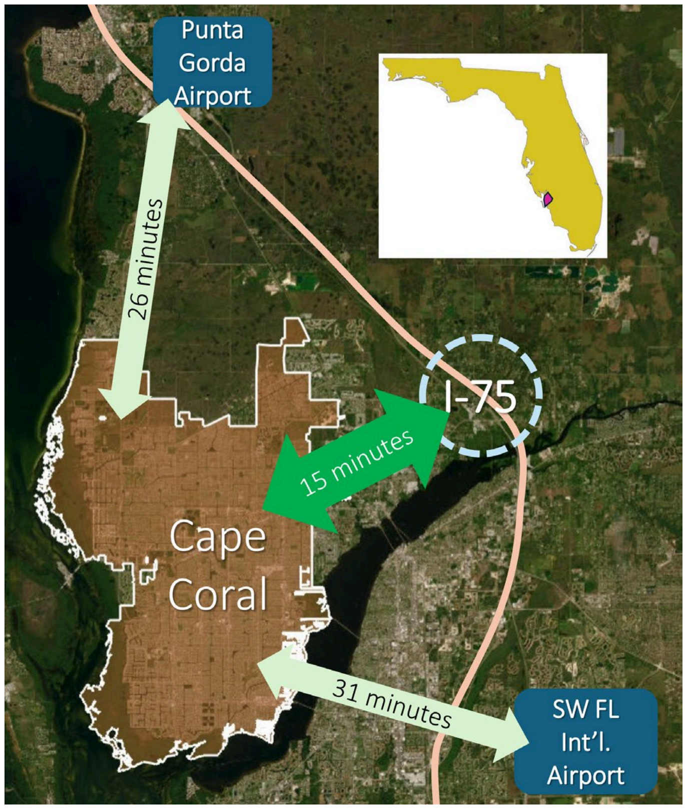
The five most sought after fields of study are:

1. Business, Management, Marketing, and Related Support Services
2. Health Professions and Related Programs
3. Education
4. Multi/Interdisciplinary Studies
5. Psychology

Market Potential

Cape Coral's southwest Florida location can not only cover the total Florida market but a significant portion of the US. Within a 300-mile travel distance (one day truck routing), about **6.1%** of the nation can be reached.

Highway Travel



Interstate 75 (I-75) is within **15 minutes**' drive from Cape Coral. Access to the interstate can be achieved to the eastern direction in North Fort Myers or via one of the bridges through downtown Fort Myers. To the north, access is available in Punta Gorda at a slightly longer travel time.

Air Travel

There are two airports that serve Cape Coral. Southwest Florida International Airport (RSW) is a major facility providing domestic and international flights daily. Travel to RSW is within **31 minutes** from downtown Cape Coral. RSW serves **10.1 million** passengers annually. In 2023, RSW had **87,685** aircraft operations.

Punta Gorda Airport (PGD) in Charlotte County just north of Cape Coral is a regional facility providing domestic flights mainly to the Midwest (Allegiant Air). PGD serves about **1.9 million** passengers per year and had **103,252** aircraft operations in 2023.

Rail Service

Passenger rail service via Amtrak is available in Fort Myers. The system operates **77** daily scheduled trips. Travel from downtown to Fort Myers Station Cape Coral is about **31 minutes**.

Freight rail services are provided by the Seminole Gulf Railway (SGLR). SGLR is a short line freight and passenger excursion railroad headquartered in Fort Myers that operates two former CSX Transportation railroad lines in Southwest Florida.

Bus Service

LeeTran operates bus services in Cape Coral. Currently there are **5** fixed bus routes but expanded services are under development. Looped routes provide transit to and from Fort Myers. The new Ultra On Demand micro-mobility fleet will enhance bus transit capabilities throughout the City.

Lifestyle & Recreational

Cape Coral's riverfront location and unique canal system offer a recreation-oriented lifestyle that has broad-range appeal. Some of the area's tourism advantages are as follows:

- Growing residential population, which can further encourage already existing strong category of visiting friends & family travelers
- Major home rental market for vacationers – over **4,000** homes and **350** private rooms available
- Numerous opportunities to rent a house and boat together, canals enhance rental properties
- Major hotel - Westin Resort at Marina Village – significant anchor for tourism activity
- Favorable location
- Proximity to airports, major highways, and neighboring tourist communities.
- One of safest cities in Florida
- Sports tourism – an already existing, active, and effective government involvement
- Increasingly strong restaurant and food scene
- Water activities – boating, dolphin tours, fishing, kayaking
- Winter warm weather destination
- Major League Baseball Spring Training nearby
- Active events schedule including festivals, parades, and concerts

Contact Information

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INDUSTRY PROSPECTUS

Competitive Advantages for the Consumer Products & Services Cluster in the City of Cape Coral

City of Cape Coral
Office of Economic & Business Development

This cluster illustrates the regional growth of consumer products and services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

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Photo credit: DepositPhotos

Key Findings

- As part of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Consumer Products & Services Cluster.

- The Consumer Products & Services Cluster consists of **3** major industry groups and 13 industry sub-components:
  - Automotive services
    - Automobile dealers
    - Automotive equipment rental and leasing
    - Motor vehicle and motor vehicle parts and supplies merchant wholesalers
  - Consumer Products Wholesaling
    - Hardware, and plumbing and heating equip. and supplies merchant wholesalers
    - Household appliances and electrical and electronic goods merchant wholesalers
    - Miscellaneous durable goods merchant wholesalers
    - Professional and commercial equipment and supplies merchant wholesalers
  - Consumer Retail
    - Clothing and clothing accessories retailers
    - Shoe retailers
    - Sporting goods, hobby, and musical instrument retailers
    - Book retailers and news dealers
    - Florists
    - Used merchandise retailers

- Revenue (in current dollars) for the Consumer Products Services Cluster is **$3,140.7 billion**. Growth expectations in the next five years will raise this figure to **$3,615.2 billion**, which is a **2.85%** compound annual growth rate (CAGR), or an overall **15.1%** revenue gain.

- The **13** individual industries that comprise the cluster have projected revenue gains ranging from **37.0%** (Sporting goods, hobby, and musical instrument retailers) to **6.4%** (Professional and commercial equip. and supplies whole.). In aggregate, the cluster demonstrates solid revenue growth for the next several years.

- Florida ranks in **3rd** place for Consumer Products & Services Cluster employment among the **10** leading US states.

- The Cluster has a projected **1,430** new jobs in Cape Coral supportable by the labor market.

- There are **6** Florida cities identified as direct competitors to Cape Coral:
    - Fort Lauderdale
    - Orlando
    - Palm Bay
    - Pompano Beach
    - Port St. Lucie
    - West Palm Beach

- As an example of typical Cluster business, a Sports & Recreation Goods & Supplies Merchant Wholesaler of **7** persons in Cape Coral will generate **$7.734 million** in annual revenue.

- Profitability for a Sporting and Recreational Goods & Supplies Merchant Wholesaler in Cape Coral will be **18.3**%, leading all competition.

- Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" retail and warehouse facilities that can capture some of this worker flow.

- With the projected office census of **1,430** new jobs (889 retail, 541 wholesale), it can be expected that at least **311,000 sf** of new retail and **812,000 sf** of new warehouse space will be required to meet the Cluster's employment needs.

Introduction

As part of the development of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Consumer Products & Services Cluster.

As defined by Harvard University, "a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support.

The Cluster illustrates the regional growth of consumer products & services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments, capitalizing on untapped labor markets, with good market access to multiple urban centers.

The Cluster consists of **3** major groups covering **13** industry components:

Automotive services

- Automobile dealers
- Automotive equipment rental and leasing
- Motor vehicle and motor vehicle parts and supplies merchant wholesalers

Consumer Products Wholesaling

- Hardware, and plumbing and heating equip. and supplies merchant wholesalers
- Household appliances and electrical and electronic goods merchant wholesalers
- Miscellaneous durable goods merchant wholesalers
- Professional and commercial equipment and supplies merchant wholesalers

Consumer Retail

- Clothing and clothing accessories retailers
- Shoe retailers
- Sporting goods, hobby, and musical instrument retailers
- Book retailers and news dealers
- Florists
- Used merchandise retailers

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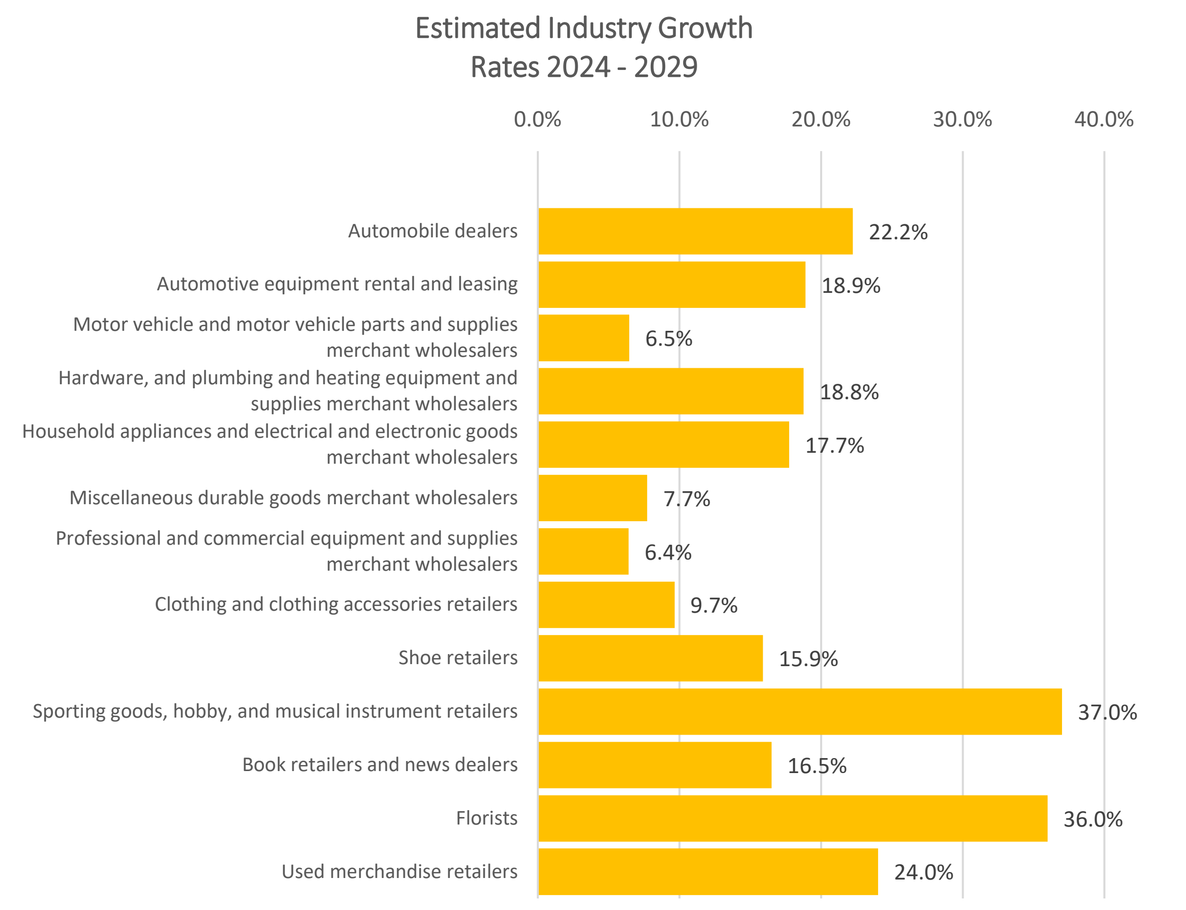
Exhibit 1 – Industry Performance Projections 2024-2029



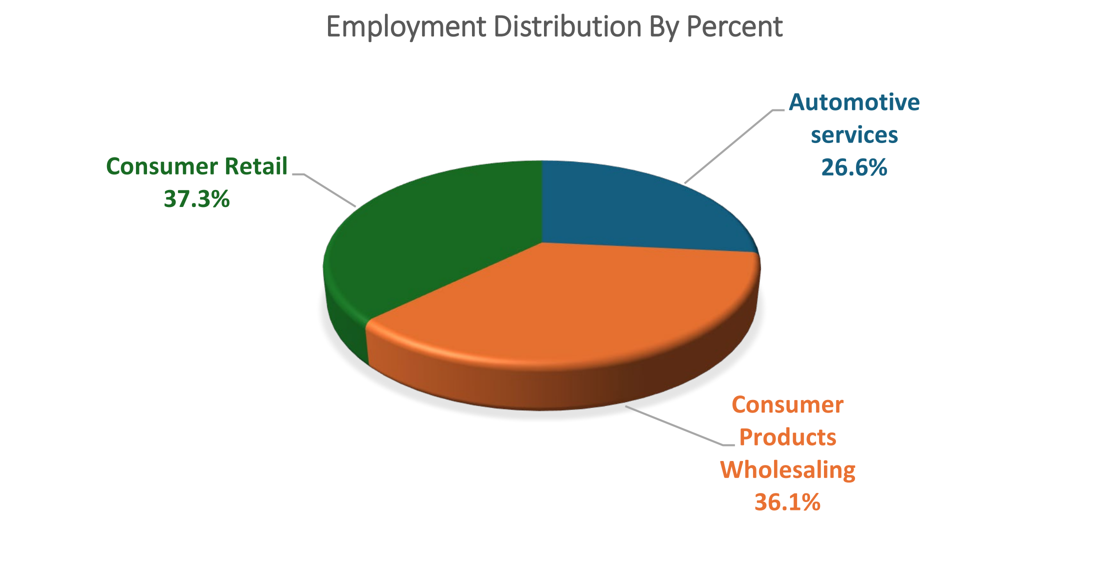
In the following Exhibit 2, each of the component industries are presented with their individual revenue growth expectations, employee productivity evaluation and typical establishment size.

Exhibit 2 – Component Industries Data Aggregation					
Automotive Services					
Automobile dealers			Automotive equipment rental and leasing		
	2024	2029		2024	2029
Revenue ($ billion)	$210.5	$257.3	Revenue ($ billion)	$69.4	$82.5
CAGR	4.10%		CAGR	3.52%	
Revenue Gain ($ billion)	$46.80		Revenue Gain ($ billion)	$13.11	
Revenue Gain (percent)	22.2%		Revenue Gain (percent)	18.9%	
Revenue per employee	$164,688		Revenue per employee	$324,858	
Typ. Estb. Size (US)	27		Typ. Estb. Size (US)	11	
Motor vehicle and motor vehicle parts and supplies merchant wholesalers					
	2024	2029			
Revenue ($ billion)	$823.3	$876.5			
CAGR	1.26%				
Revenue Gain ($ billion)	$53.19				
Revenue Gain (percent)	6.5%				
Revenue per employee	$2,190,770				
Typ. Estb. Size (US)	14				
Consumer Products Wholesaling					
Hardware, and plumbing and heating equipment and supplies merchant wholesalers			Household appliances and electrical and electronic goods merchant wholesalers		
	2024	2029		2024	2029
Revenue ($ billion)	$150.0	$178.2	Revenue ($ billion)	$83.9	$98.8
CAGR	3.50%		CAGR	3.32%	
Revenue Gain ($ billion)	$28.15		Revenue Gain ($ billion)	$14.89	
Revenue Gain (percent)	18.8%		Revenue Gain (percent)	17.7%	
Revenue per employee	$481,970		Revenue per employee	$224,530	
Typ. Estb. Size (US)	11		Typ. Estb. Size (US)	9	
Miscellaneous durable goods merchant wholesalers			Professional and commercial equipment and supplies merchant wholesalers		
	2024	2029		2024	2029
Revenue ($ billion)	$339.0	$365.2	Revenue ($ billion)	$399.5	$425.1
CAGR	1.50%		CAGR	1.25%	
Revenue Gain ($ billion)	$26.20		Revenue Gain ($ billion)	$25.60	
Revenue Gain (percent)	7.7%		Revenue Gain (percent)	6.4%	
Revenue per employee	$1,082,175		Revenue per employee	$538,176	
Typ. Estb. Size (US)	7		Typ. Estb. Size (US)	10	

Consumer Retail					
Clothing and clothing accessories retailers			Shoe retailers		
	2024	2029		2024	2029
Revenue ($ billion)	$358.7	$393.3	Revenue ($ billion)	$95.0	$110.1
CAGR	1.86%		CAGR	2.99%	
Revenue Gain ($ billion)	$34.62		Revenue Gain ($ billion)	$15.09	
Revenue Gain (percent)	9.7%		Revenue Gain (percent)	15.9%	
Revenue per employee	$439,531		Revenue per employee	$564,408	
Typ. Estb. Size (US)	10		Typ. Estb. Size (US)	11	
Sporting goods, hobby, and musical instrument retailers			Book retailers and news dealers		
	2024	2029		2024	2029
Revenue ($ billion)	$505.0	$691.9	Revenue ($ billion)	$23.4	$27.3
CAGR	6.50%		CAGR	3.10%	
Revenue Gain ($ billion)	$186.89		Revenue Gain ($ billion)	$3.86	
Revenue Gain (percent)	37.0%		Revenue Gain (percent)	16.5%	
Revenue per employee	$1,055,560		Revenue per employee	$359,453	
Typ. Estb. Size (US)	10		Typ. Estb. Size (US)	8	
Florists			Book retailers and news dealers		
	2024	2029		2024	2029
Revenue ($ billion)	$8.6	$12.6	Revenue ($ billion)	$30.8	$38.2
CAGR	8.01%		CAGR	4.40%	
Revenue Gain ($ billion)	$4.04		Revenue Gain ($ billion)	$7.40	
Revenue Gain (percent)	47.0%		Revenue Gain (percent)	24.0%	
Revenue per employee	$151,047		Revenue per employee	$147,147	
Typ. Estb. Size (US)	5		Typ. Estb. Size (US)	11	

The distribution of employment in the 3 major groups of the Consumer Products & Services Cluster is illustrated in Exhibit 3 (below):

Exhibit 3 – US Employment Distribution in the Consumer Products & Services Cluster



For a Florida location, the **3rd** place ranking for Consumer Products & Services Cluster employment among the **10** leading states is a favorable condition as shown in Exhibit 4 (below):

Exhibit 4 – Ten Leading States for Consumer Products & Services Cluster Employment		
State	2024 Employment	Rank
California	603,218	1
Texas	541,771	2
Florida	396,744	3
New York	287,191	4
Illinois	213,489	5
Ohio	206,366	6
Pennsylvania	185,477	7
Georgia	179,060	8
North Carolina	177,771	9
New Jersey	171,614	10

The Fit for Cape Coral

As part of an Economic Development Strategic Plan for Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Consumer Products & Services Cluster. As described earlier, the Cluster contains **3** major groups and **13** component business areas. In total, they have a projected **1,430** new jobs supportable by the Cape Coral labor market, as shown in Exhibit 5 (below):

Exhibit 5 - Consumer Products & Services Cluster Employment	
Industry	# of New Jobs
Automotive services	
Automobile dealers	372
Automotive equipment rental and leasing	49
Motor vehicle and motor vehicle parts and supplies merchant wholesalers	88
Subtotal	**509**
Consumer Products Wholesaling	
Hardware, and plumbing and heating equipment and supplies merchant wholesalers	44
Household appliances and electrical and electronic goods merchant wholesalers	42
Miscellaneous durable goods merchant wholesalers	98
Professional and commercial equipment and supplies merchant wholesalers	269
Subtotal	**453**
Consumer Retail	
Clothing and clothing accessories retailers	80
Shoe retailers	70
Sporting goods, hobby, and musical instrument retailers	147
Book retailers and news dealers	19
Florists	18
Used merchandise retailers	134
Subtotal	**468**
Total	**1,430**

For exploratory purposes, the **Miscellaneous Durable Goods Merchant Wholesalers** industry has been selected for deeper examination. For this industry category, there is a projected growth of **98** new jobs. Within this heading are **5** sub-categories of industries, one of which will be explored in greater detail.

- Sporting and Recreational Goods and Supplies Merchant Wholesalers
- Toy and Hobby Goods and Supplies Merchant Wholesalers
- Recyclable Material Merchant Wholesalers
- Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers
- Other Miscellaneous Durable Goods Merchant Wholesalers

Sporting and Recreational Goods and Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of sporting goods and accessories; billiard and pool supplies; sporting firearms and ammunition; and/or marine pleasure craft, equipment, and supplies.

Model Operations

The national average size for a Sports and Recr. G. & S. Merchant Wholesale facility is 8 persons, and the State of Florida's is 6 persons. A nominal facility size of 7 persons is selected as a Cape Coral model for this industry. Average productivity output for Sports and Recr. G. & S. Merchant Wholesale for is **$1,082,200** per employee, resulting in an annual sales figure of $**7.734 million**. Total investment per employee is estimated at **$166,200**. Exhibit 6 (below) shows the operations details:

Exhibit 6 – Typical Sports and Recr. G. & S. Merchant Wholesale Facility Operations	
Annual Net sales	$7,734,300
Total Employment	7
Avg. hourly Wage	$28.94
Fringe benefits Percentage	30%
Total Payroll	$568,900
Facility Footprint sq. ft.	10,700
Employee Occupancy/sf	1,500
Floor-Area-Ratio	0.25
Facility Construction Cost/sq. ft.	$69
Facility Construction Cost	$742,900
Estimated Equipment Cost	$150,000
Site Acreage	1.0
Land Cost	$295,000
Total Investment	**$1,187,900**

Staffing

Employment distribution among the relevant major occupational groups for the industry are shown in Exhibit 7 (below):

Exhibit 7- Sports and Recr. G. & S. Merchant Wholesale – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Sales Representatives, Wholesale	2	$34.40	$33.41
Laborers and Freight, Stock, and Material Movers, Hand	1	$16.74	$16.72
General and Operations Managers	1	$54.50	$51.54
Stockers and Order Fillers	1	$16.07	$15.46
Heavy and Tractor-Trailer Truck Drivers	1	$23.89	$22.84
Shipping, Receiving, and Inventory Clerks	1	$18.19	$17.93
Total	**7**		
Average Hourly Wage		**$28.31**	**$27.33**

Labor Capability

Available labor is calculated by using both the current unemployment rate (U3) for the Cape Coral-Fort Myers MSA and the factored under-employment rate[1] (U6) from the Bureau of Labor Statistics. For the target of **98** new jobs for the industry sector, the Employee Census table from above is revisited with the overall new job requirements shown in Exhibit 8 (below).

Exhibit 8 - Sports and Recr. G. & S. Merchant Wholesale – Occupations Needed	
Occupation	# of new jobs
Sales Representatives, Wholesale	28
Laborers and Freight, Stock, and Material Movers, Hand	14
General and Operations Managers	14
Stockers and Order Fillers	14
Heavy and Tractor-Trailer Truck Drivers	14
Shipping, Receiving, and Inventory Clerks	14
Total Occupations Required	**98**

[1] U6: Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

In the following, the **6** categories of staffing for Sports and Recr. G. & S. Merchant Wholesale are evaluated for direct hiring capabilities:

Sales Representatives, Wholesale
In the Cape Coral-Fort Myers MSA, there are currently **2,320** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **161** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Laborers and Freight, Stock, and Material Movers, Hand
In the MSA, there are currently **3,220** persons employed in this position. It is estimated that there are approximately **224** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

General and Operations Managers
In the MSA, there are currently **6,110** persons employed in this position. It is estimated that there are approximately **425** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Stockers and Order Fillers
In the MSA, there are currently **5,710** persons employed in this position. It is estimated that there are approximately **397** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Heavy and Tractor-Trailer Truck Drivers
In the MSA, there are currently **2,450** persons employed in this position. It is estimated that there are approximately **170** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Shipping, Receiving, and Inventory Clerks
In the MSA, there are currently **1,110** persons employed in this position. It is estimated that there are approximately **77** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, there are no positions that exhibit shortfall for Sporting and Recreational Goods and Supplies Merchant Wholesalers. For a potential Cape Coral location, it can be expected that wholesalers will not experience any significant labor shortages.

Comparison Analyses

The objective of this section is the determination of which Florida cities are Cape Coral's true competition, not just Fort Myers or another Southwest Florida community. To accomplish this evaluation, a review of **22** municipalities in Florida with a population of **100,000** or more was conducted. Through analysis of population growth for each of the as compared to annual rate for the State of Florida, **6** cities emerged as true competitors to Cape Coral:

- Fort Lauderdale
- Orlando
- Palm Bay
- Pompano Beach
- Port St. Lucie
- West Palm Beach

Profitability Determination

Base financial information is shown in Exhibit 9 (below):

Exhibit 9 - Sports and Recr. G. & S. Merchant Wholesale – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$295,000**	**$60**	**$645,000**	**$1,090,000**	**$872,000**	**$68,500**
Fort Lauderdale	$1,437,000	$1,437,000	$63	$674,000	$2,261,000	$1,808,800	$142,100
Orlando	$201,000	$201,000	$62	$664,000	$1,015,000	$812,000	$63,800
Palm Bay	$494,000	$494,000	$66	$703,000	$1,347,000	$1,077,600	$84,700
Pompano Beach	$2,057,000	$2,057,000	$63	$674,000	$2,881,000	$2,304,800	$181,100
Port St. Lucie	$146,000	$146,000	$61	$656,000	$952,000	$761,600	$59,800
West Palm Beach	$975,000	$975,000	$61	$656,000	$1,781,000	$1,424,800	$112,000

Profitability for Sporting and Recreational Goods & Supplies Merchant Wholesalers in Cape Coral is **18.3%**, leading all competition, as shown in Exhibit 10 (below):

Exhibit 10- Sports and Recr. G. & S. Merchant Wholesale – Competitive Evaluation – Annual Operating Profits							
Market	**Cape Coral**	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Annual Net sales	**100.0%**	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Payroll (incl. benefits)	**7.4%**	8.0%	7.8%	7.5%	8.0%	7.0%	8.0%
Utilities & Fuels	**14.0%**	17.5%	15.2%	17.5%	17.7%	17.5%	17.5%
Debt Service	**0.9%**	1.8%	0.8%	1.1%	2.3%	0.8%	1.4%
Materials	**22.5%**	22.5%	22.5%	22.5%	22.5%	22.5%	22.5%
Cost of goods sold	**44.7%**	49.9%	46.3%	48.7%	50.5%	47.8%	49.5%
Annual Gross profit	**55.3%**	50.1%	53.7%	51.3%	49.5%	52.2%	50.5%
Less: Sales exp.	**15.0%**	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
General & Administrative. Overhead	**22.0%**	22.0%	22.0%	22.0%	22.0%	22.0%	22.0%
Total Operating expenses	**37.0%**	37.0%	37.0%	37.0%	37.0%	37.0%	37.0%
Annual Net Profit before taxes	**18.3%**	13.1%	16.7%	14.3%	12.5%	15.2%	13.5%

Summary

The Cluster illustrates the regional growth of consumer products and services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

Metrics for the Cluster and its component industries all indicate positive revenue growth for the next five years. The Cluster represents a mix of retail and warehouse space users, quite suitable for a Cape Coral location. Some advantages include:

Business-friendly policies

Florida offers a favorable tax and business climate, including no state income tax.

Strong workforce

Florida's diverse economy and strong workforce support the labor force.

Proximity to markets

Florida's location near buyers, suppliers, labor, and transportation allows companies to cut costs and develop close relationships with the community.

For Cape Coral, operations such as Sporting and Recreational Goods & Supplies Merchant Wholesalers will be profitable endeavors. The City and the MSA have a dynamic labor supply that is well suited to meet the needs of the Consumer Products & Services Cluster.

Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" retail and warehouse facilities that can capture some of this worker flow.

With the projected office census of **1,430** new jobs (889 retail, 541 wholesale), it can be expected that at least **311,000 sf** of new retail and **812,000 sf** of new warehouse space will be required to meet the Cluster's employment needs.

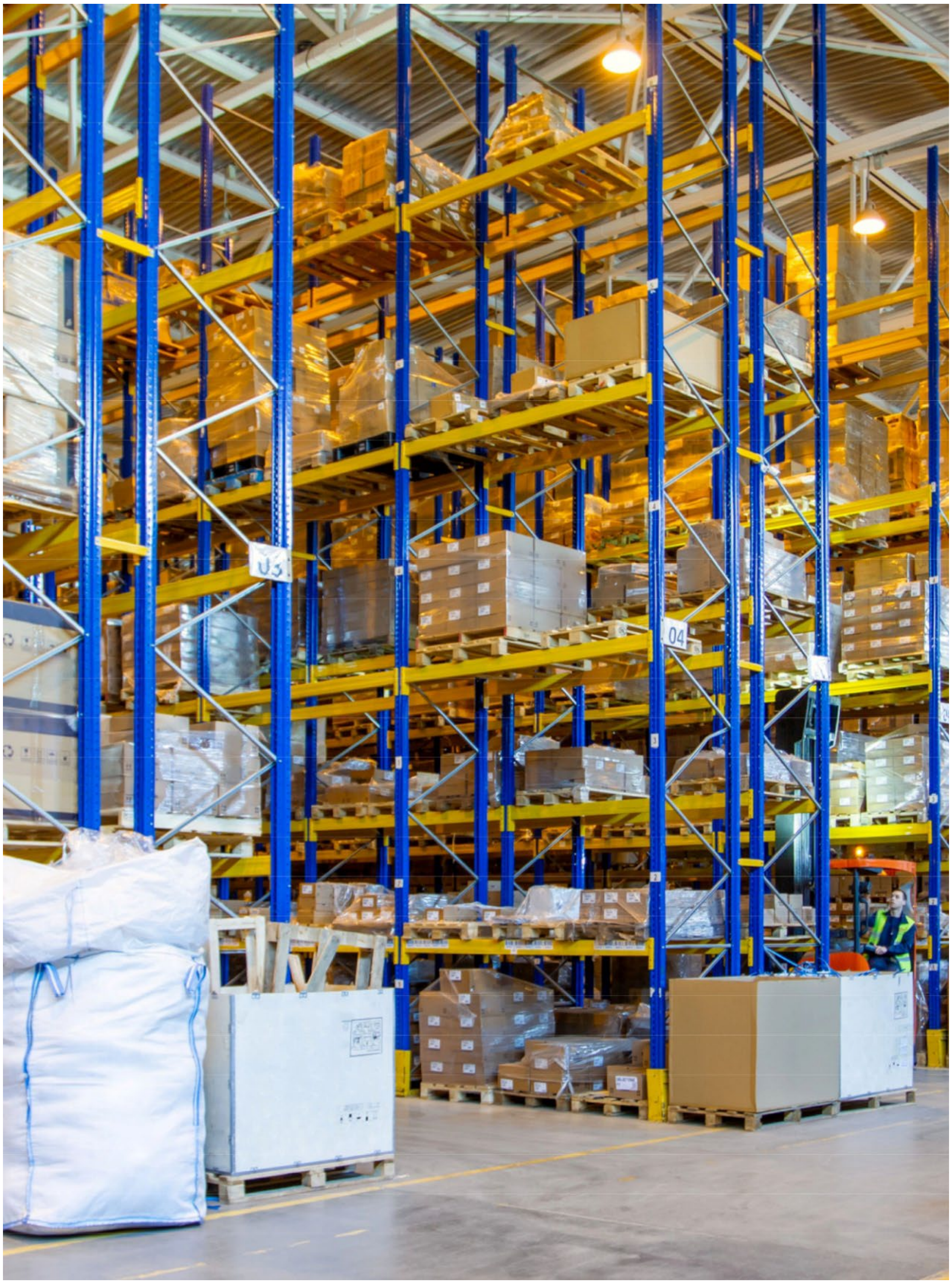


Photo credit: Depositphotos

Competitive Advantages of the City of Cape Coral Location

Cape Coral is in Lee County in Southwest Florida and is the largest population component of the Cape Coral-Fort Myers Metropolitan Statistical Area. The City's location is about an equidistance from the major urban centers of Tampa, Miami, and Orlando.

Originally developed in the late 1950's as a "Waterfront Wonderland", Cape Coral was designed to bring the waterfront dream of home ownership to middle-income Americans. With its over 400 miles of salt and freshwater canals, Cape Coral is a unique community that is redefining its identity beyond being just a suburb of Fort Myers. The City was incorporated in 1970 and maintains a brisk growth pattern despite economic downturns, a pandemic, and severe weather disturbances.

Demographic Advantages

With a current population of approximately **217,000** people, Cape Coral is forecasted to grow to over **375,000** by 2050, representing a nearly **73%** increase. Cape Coral's explosive growth places it among the five fastest growing communities in the nation, measuring more than twice that of the State of Florida.

While more retirees are expected, the City is experiencing a dynamic growth in the working age groups of **25-44 yrs**. By 2029, an overall population gain of about **20,000** new residents will result in **34%** increase in working aged people.

Demographic and market advantages include:

- Growth rate exceeding the State's
- Dynamic growth rate among 25-44 yr. old residents
- Above average number of executive-age workers

- Exemplary rate of English language proficiency
- Above average household size
- Above average median household income
- Above average home ownership rate
- Below average cost of living rate
- Above average good/services industries employment
- Below average services industries hourly wages
- Above average worker mobility patterns
- Below average commercial and industrial electric rates

Higher Education Resources

There are **9** four-year colleges and universities within **50** miles of Cape Coral. In 2022, **9,933** degrees were conferred by the following institutions:

- Florida Gulf Coast University (Fort Myers)
- Florida SouthWestern State College (Fort Myers)
- Southern Technical College (Fort Myers)
- Hodges University (Fort Myers)
- Keiser University-Ft Myers (Fort Myers)
- Rasmussen University-Fort Myers (Fort Myers)
- Ave Maria School of Law (Naples)
- Ave Maria University (Ave Maria)

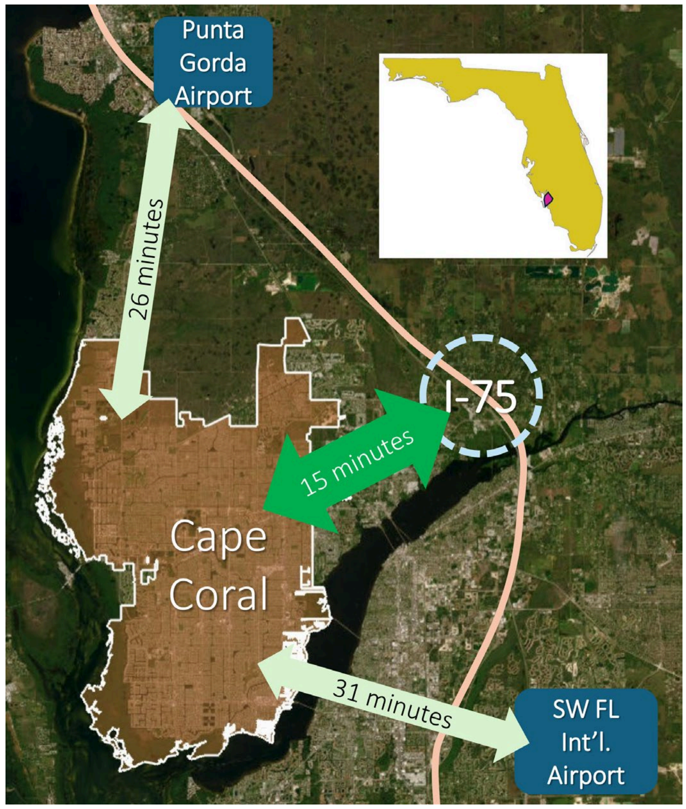
The five most sought after fields of study are:

1. Business, Management, Marketing, and Related Support Services
2. Health Professions and Related Programs
3. Education
4. Multi/Interdisciplinary Studies
5. Psychology

Market Potential

Cape Coral's southwest Florida location can not only cover the total Florida market but a significant portion of the US. Within a 300-mile travel distance (one day truck routing), about **6.1%** of the nation can be reached.

Highway Travel



Interstate 75 (I-75) is within **15 minutes**' drive from Cape Coral. Access to the interstate can be achieved to the eastern direction in North Fort Myers or via one of the bridges through downtown Fort Myers. To the north, access is available in Punta Gorda at a slightly longer travel time.

Air Travel

There are two airports that serve Cape Coral. Southwest Florida International Airport (RSW) is a major facility providing domestic and international flights daily. Travel to RSW is within **31 minutes** from downtown Cape Coral. RSW serves **10.1 million** passengers annually. In 2023, RSW had **87,685** aircraft operations.

Punta Gorda Airport (PGD) in Charlotte County just north of Cape Coral is a regional facility providing domestic flights mainly to the Midwest (Allegiant Air). PGD serves about **1.9 million** passengers per year and had **103,252** aircraft operations in 2023.

Rail Service

Passenger rail service via Amtrak is available in Fort Myers. The system operates **77** daily scheduled trips. Travel from downtown to Fort Myers Station Cape Coral is about **31 minutes**.

Freight rail services are provided by the Seminole Gulf Railway (SGLR). SGLR is a short line freight and passenger excursion railroad headquartered in Fort Myers that operates two former CSX Transportation railroad lines in Southwest Florida.

Bus Service

LeeTran operates bus services in Cape Coral. Currently there are **5** fixed bus routes but expanded services are under development. Looped routes provide transit to and from Fort Myers. The new Ultra On Demand micro-mobility fleet will enhance bus transit capabilities throughout the City.

Lifestyle & Recreational

Cape Coral's riverfront location and unique canal system offer a recreation-oriented lifestyle that has broad-range appeal. Some of the area's tourism advantages are as follows:

- Growing residential population, which can further encourage already existing strong category of visiting friends & family travelers
- Major home rental market for vacationers – over **4,000** homes and **350** private rooms available
- Numerous opportunities to rent a house and boat together, canals enhance rental properties
- Major hotel - Westin Resort at Marina Village – significant anchor for tourism activity
- Favorable location
- Proximity to airports, major highways, and neighboring tourist communities.
- One of safest cities in Florida
- Sports tourism – an already existing, active, and effective government involvement
- Increasingly strong restaurant and food scene
- Water activities – boating, dolphin tours, fishing, kayaking
- Winter warm weather destination
- Major League Baseball Spring Training nearby
- Active events schedule including festivals, parades, and concerts

DCG Corplan
PARTER Forgey Planning
D-H&Assoc

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December 2024

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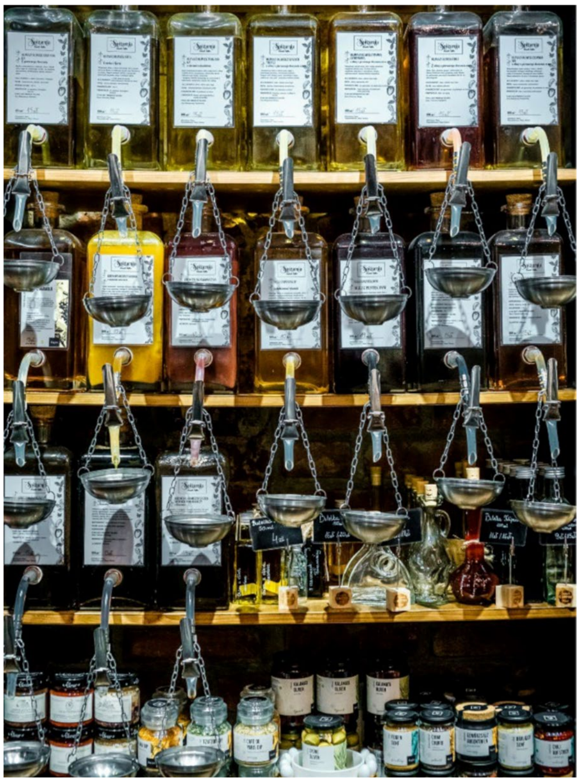
INDUSTRY PROSPECTUS

Competitive Advantages for the Culinary Tourism Cluster in the City of Cape Coral

City of Cape Coral
Office of Economic & Business Development

Cape Coral FLORIDA

This cluster illustrates the regional growth of unique food creations and sales that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.



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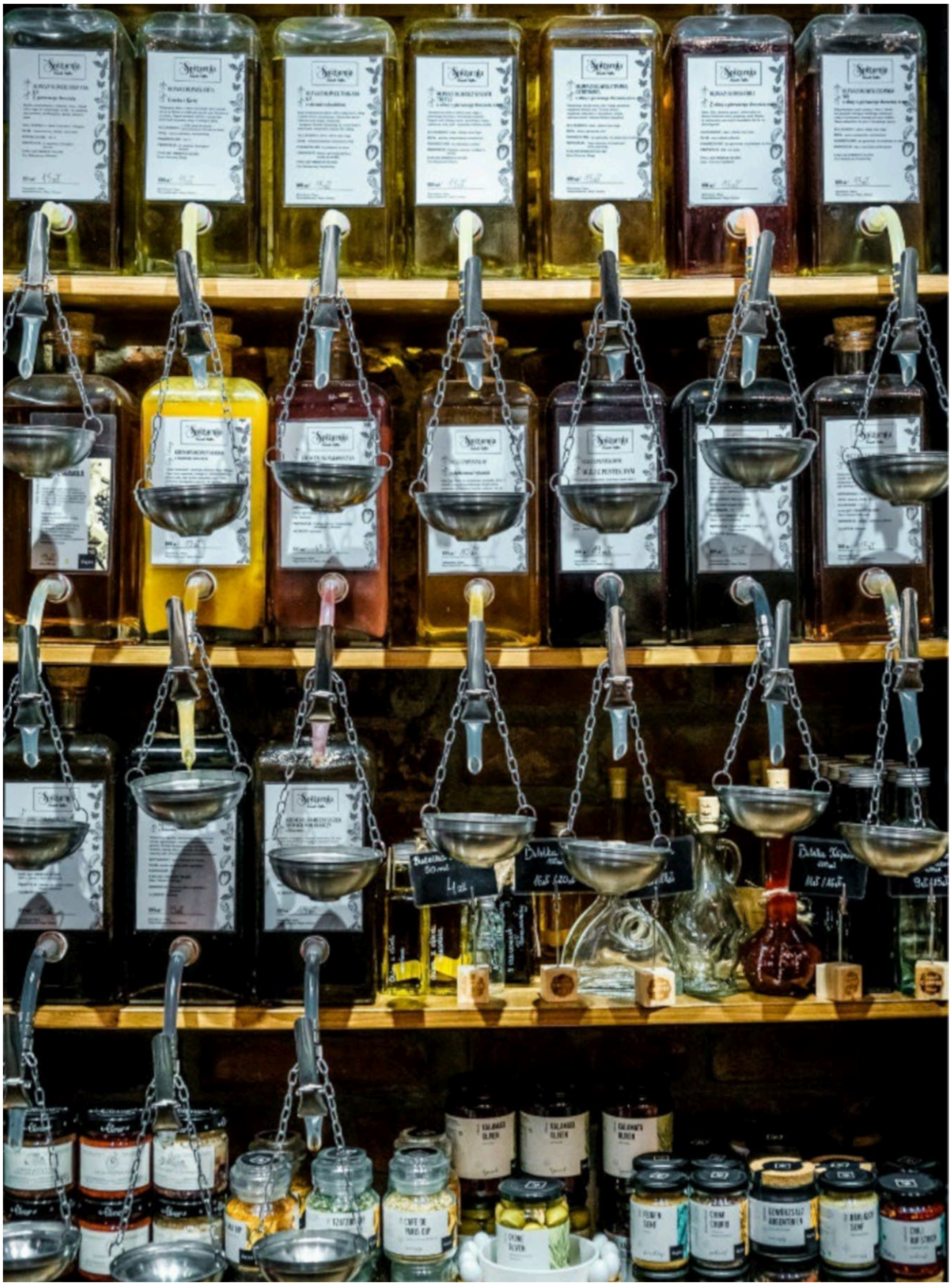


Photo credit: DepositPhotos

Key Findings

- As part of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Culinary Tourism Cluster.

- The Culinary Tourism Cluster consists of **2** industry components:
  - Specialty Food Retailers
  - Special Food Services

- Revenue (in current dollars) for the Culinary Tourism is **$403.2 billion**. Growth expectations in the next five years will raise this figure to **$523.2 billion**, which is a **5.50%** compound annual growth rate (CAGR), or an overall **29.8%** revenue gain.

- The **2** individual industries that comprise the cluster have projected revenue gains ranging from **30.1%** (Specialty Food Retailers) to **29.4%** (Special Food Services). In aggregate, the cluster demonstrates solid revenue growth for the next several years.

- Florida ranks in 4th place for Culinary Tourism Cluster employment among the **10** leading US states.

- The Cluster has a projected **492** new jobs in Cape Coral supportable by the labor market.

- There are **6** Florida cities identified as direct competitors to Cape Coral:
  - Fort Lauderdale
  - Orlando
  - Palm Bay
  - Pompano Beach
  - Port St. Lucie
  - West Palm Beach

- As an example of typical Cluster business, a Food Service Contractors facility of **19** persons in Cape Coral will generate **$4.586 million** in annual revenue.

- Profitability for a Food Service Contractors Facility in Cape Coral is **11.1%** which leads all competition with the exception of Port St. Lucie.

- Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" facilities that can capture some of this worker flow.

- With the projected office census of **492** new jobs, it can be expected that at least **234,000 sf** of flex space and **7,200** of retail space will be required to meet the Cluster's employment needs.

Introduction

As part of the development of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Culinary Tourism Cluster.

As defined by Harvard University, “a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support.

This cluster illustrates the regional growth of manufacturing and industrial services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

The Cluster consists of **2** industry components:

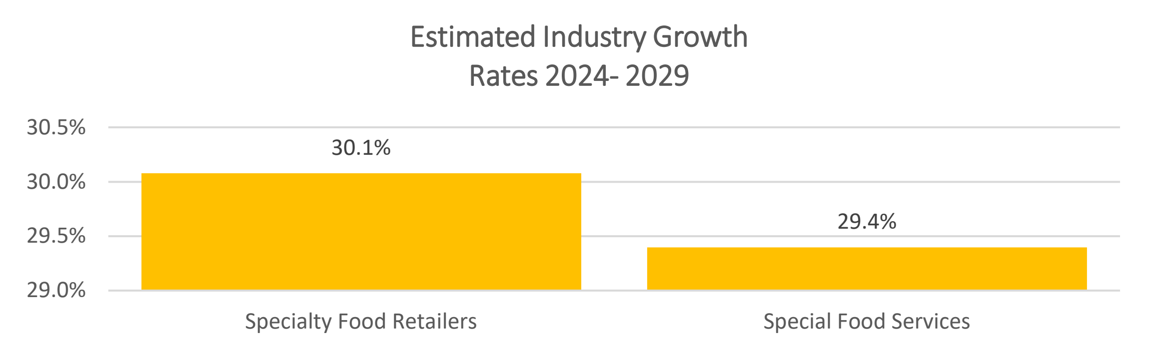
- Specialty Food Retailers
- Special Food Services

Industries Performances

Revenue (in current dollars) for the Culinary Tourism Cluster is **$403.2 billion**. Growth expectations in the next five years will raise this figure to **$523.2 billion**, which is a **5.50%** compound annual growth rate (CAGR), or an overall **29.8%** revenue gain.

The **2** individual industries that comprise the cluster have projected revenue gains ranging from **30.1%** (Specialty Food Retailers) to **29.4%** (Special Food Services). In aggregate, the cluster demonstrates solid revenue growth for the next several years. Refer to Exhibit 1 (below).

Exhibit 1 – Industry Performance Projections 2024-2029



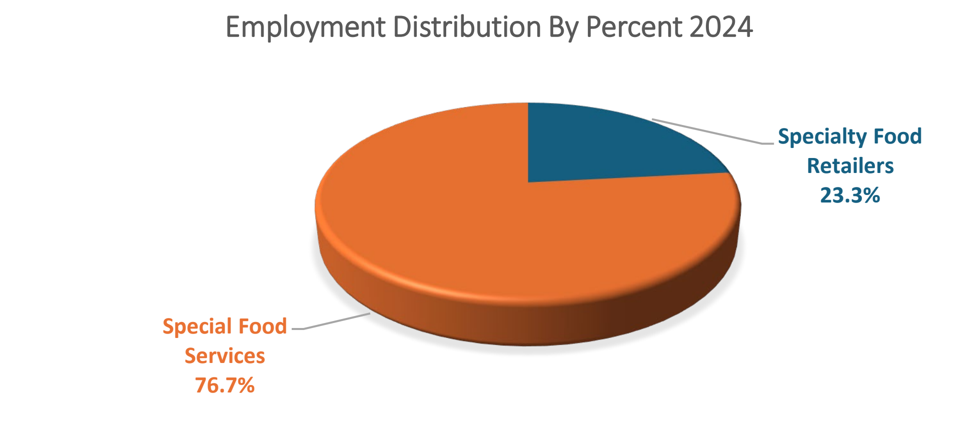
In the following Exhibit 2, each of the component industries are presented with their individual revenue growth expectations, employee productivity evaluation and typical establishment size.

Exhibit 2 – Component Industries Data Aggregation

Specialty Food Retailers			Special Food Services		
	2024	2029		2024	2029
Revenue ($ billion)	$221.50	$288.12	Revenue ($ billion)	$181.65	$235.05
CAGR	5.40%		CAGR	5.29%	
Revenue Gain ($ billion)	$66.62		Revenue Gain ($ billion)	$53.40	
Revenue Gain (percent)	30.1%		Revenue Gain (percent)	29.4%	
Revenue per employee	$967,500		Revenue per employee	$240,900	
Typ. Estb. Size (US)	8		Typ. Estb. Size (US)	15	

The distribution of employment in the Culinary Tourism Cluster is illustrated in Exhibit 3 (below):

Exhibit 3 – US Employment Distribution in the Culinary Tourism Cluster



For a Florida location, the **4th** place ranking for the Culinary Tourism Cluster employment among the **10** leading states is a favorable condition as shown in Exhibit 4 (below):

Exhibit 4 – Ten Leading States for the Culinary Tourism Cluster Employment

State	2024 Employment	Rank
California	105,897	1
Texas	81,945	2
New York	81,572	3
Florida	64,308	4
Pennsylvania	46,742	5
Illinois	45,907	6
New Jersey	44,964	7
Michigan	29,322	8
Ohio	28,860	9
Massachusetts	28,389	10

The Fit for Cape Coral

As part of an Economic Development Strategic Plan for Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Culinary Tourism Cluster. The Cluster contains the **2** component business areas that have a projected **492** new jobs supportable by the Cape Coral labor market, as shown in Exhibit 5 (below):

Exhibit 5 - Culinary Tourism Cluster Employment	
Industry	# of New Jobs
Specialty Food Retailers	24
Special Food Services	468
Total	**492**

For exploratory purposes, the Special Food Services industry has been selected for deeper examination. For this industry category, there is a projected the growth of **492** new jobs. Within this heading are **3** sub-categories of industries one of which will be explored in greater detail.

- Food service contractors
- Caterers
- Food trucks
- Lunch wagons
- Mobile refreshment stands
- Street vendors, food
- Ice cream trucks

Food Service Contractors

This industry comprises establishments primarily engaged in providing food services at institutional, governmental, commercial, or industrial locations of others based on contractual arrangements with these types of organizations for a specified period of time. The establishments of this industry provide food services for the convenience of the contracting organization or the contracting organization's customers. The contractual arrangement of these establishments with contracting organizations may vary by type of facility operated (e.g., cafeteria, restaurant, fast-food eating place), revenue sharing, cost structure, and personnel provided. Management staff is always provided by food service contractors.

Model Operations

The national average size for a Food Service Contractors facility is **22** persons, and the State of Florida's is **16** persons. A nominal facility size of **19** persons is selected as a Cape Coral model for this industry. Average productivity output for Food Service Contractors is **$240,900** per employee, resulting in an annual sales figure of **$4.586 million**. Total investment per employee is estimated at **$45,400**, as shown in Exhibit 6 (below):

Exhibit 6 – Food Service Contractors -- Typical Operations	
Annual Net sales	$4,586,200
Total Employment	19
Avg. hourly Wage	$409.68
Fringe benefits Percentage	30%
Total Payroll	$1,107,800
Facility Footprint sq. ft.	5,700
Employee Occupancy/sf	300
Floor-Area-Ratio	0.37
Facility Construction Cost/sq. ft.	$95
Facility Construction Cost	$543,000
Estimated Equipment Cost (annual carry)	$100,000
Site Acreage	0.5
Land Cost	$221,300
Total Investment	**$864,300**

Staffing

Employment distribution among the relevant major occupational groups for the industry is shown in Exhibit 7 (below):

Exhibit 7 – Food Service Contractors Facility – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
General and Operations Managers	1	$62.84	$56.48
Food Service Managers	1	$34.92	$35.17
Business Operations Specialists, All Other	2	$41.40	$36.78
Cooks, Institution and Cafeteria	6	$16.76	$17.47
Food Processing Workers, All Other	6	$15.75	$16.22
Packers and Packagers, Hand	3	$13.81	$14.11
Total	**19**		
Average Hourly Wage			

Labor Capability

Available labor is calculated by using both the current unemployment rate (U3) for the Cape Coral-Fort Myers MSA and the factored under-employment rate[1] (U6) from the Bureau of Labor Statistics. For the target of **468** new jobs for the industry sector, the Employee Census table from above is revisited with the overall new job requirements shown in Exhibit 8 (below).

Exhibit 8 - Food Service Contractors – Occupations Needed	
Occupation	# of new jobs
General and Operations Managers	25
Food Service Managers	25
Business Operations Specialists, All Other	49
Cooks, Institution and Cafeteria	148
Food Preparation Workers	148
Packers and Packagers, Hand	74
Total Occupations Required	**468**

In the following, the **6** categories of staffing for a Food Service Contractors Facility are evaluated for direct hiring capabilities:

General and Operations Managers

In the Cape Coral-Fort Myers MSA, there are currently **6,110** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **425** applicants

[1] U6: Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Food Service Managers

In the MSA, there are currently **620** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **43** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position.

Business Operations Specialists, All Other

In the MSA, there are currently **1,310** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **91** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Cooks, Institution and Cafeteria

In the MSA, there are currently **400** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **28** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

Food Preparation Workers

In the MSA, there are currently **2,080** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **145** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

Packers and Packagers, Hand

In the MSA, there are currently **1,200** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **83** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, staffing for a Food Service Contractors Facility in Cape Coral is projected to be quite achievable. However, the positions that exhibit a shortfall are:

- Cooks, Institution and Cafeteria
- Food Preparation Workers

The economic development and workforce officials in Cape Coral have been alerted to these employment shortfall issues. New initiatives are in development that will increase labor availability in this area.

Comparison Analyses

The objective of this section is the determination of which Florida cities are Cape Coral's true competition, not just Fort Myers or another Southwest Florida community. To accomplish this evaluation, a review of **22** municipalities in Florida with a population of **100,000** or more was conducted. Through analysis of population growth for each of the as compared to annual rate for the State of Florida, **6** cities emerged as true competitors to Cape Coral:

- Fort Lauderdale
- Orlando
- Palm Bay
- Pompano Beach
- Port St. Lucie
- West Palm Beach

Profitability Determination

Base financial information is shown in Exhibit 9 (below):

Exhibit 9 - Food Service Contractors – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$156,900**	**$95**	**$414,000**	**$570,900**	**$456,700**	**$35,900**
Fort Lauderdale	$1,437,000	$764,500	$99	$428,000	$1,192,500	$954,000	$75,000
Orlando	$201,000	$106,900	$98	$424,000	$530,900	$424,700	$33,400
Palm Bay	$494,000	$262,800	$104	$442,000	$704,800	$563,800	$44,300
Pompano Beach	$2,057,000	$1,094,400	$99	$428,000	$1,522,400	$1,217,900	$95,700
Port St. Lucie	$146,000	$77,700	$95	$414,000	$491,700	$393,400	$30,900
West Palm Beach	$975,000	$518,700	$97	$420,000	$938,700	$751,000	$59,000

Profitability for a Food Service Contractors Facility in Cape Coral is **11.1%** which leads all competition with the exception of Port St. Lucie, as shown in Exhibit 10 (below):

Exhibit 10 - Food Service Contractors – Competitive Evaluation – Annual Operating Profits							
Market	**Cape Coral**	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	**100.0%**	100.0%	100.0%	100.0 %	100.0%	100.0%	100.0%
Payroll	**24.2%**	25.5%	24.2%	24.2%	25.5%	23.1%	25.5%
Utilities & Fuels	**10.0%**	10.0%	11.5%	10.0%	10.0%	10.0%	10.0%
Debt Service	**0.8%**	1.6%	0.7%	1.0%	2.1%	0.7%	1.3%
Materials	**22.0%**	22.0%	22.0%	22.0%	22.0%	22.0%	22.0%
Cost of goods sold	**56.9%**	59.1%	58.4%	57.2%	59.5%	55.8%	58.8%
Annual Gross profit	**43.1%**	40.9%	41.6%	42.8%	40.5%	44.2%	41.2%
Less: Sales exp.	**12.0%**	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
General & Administrative. Overhead	**20.0%**	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
Total Operating expenses	**32.0%**	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%
Annual Net Profit before taxes	**11.1%**	8.9%	9.6%	10.8%	8.5%	12.2%	9.2%

Summary

The Culinary Tourism Cluster illustrates the regional growth of unique food creations and sales that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

Metrics for the Cluster and its component industries all indicate positive revenue growth for the next five years. The Cluster is essentially a mix of flex and retail space users. The Culinary Tourism industry is flourishing in Florida, partially due to the following advantages:

Business-friendly policies

Florida offers a favorable tax and business climate, including no state income tax.

Strong workforce

Florida's diverse economy and strong workforce support the labor force.

Proximity to markets

Florida's location near buyers, suppliers, labor, and transportation allows companies to cut costs and develop close relationships with the community.

For Cape Coral, operations such as a Food Service Contractors will be profitable endeavors. The City and the MSA have a dynamic labor supply that is well suited to meet the needs of the Culinary Tourism Cluster.

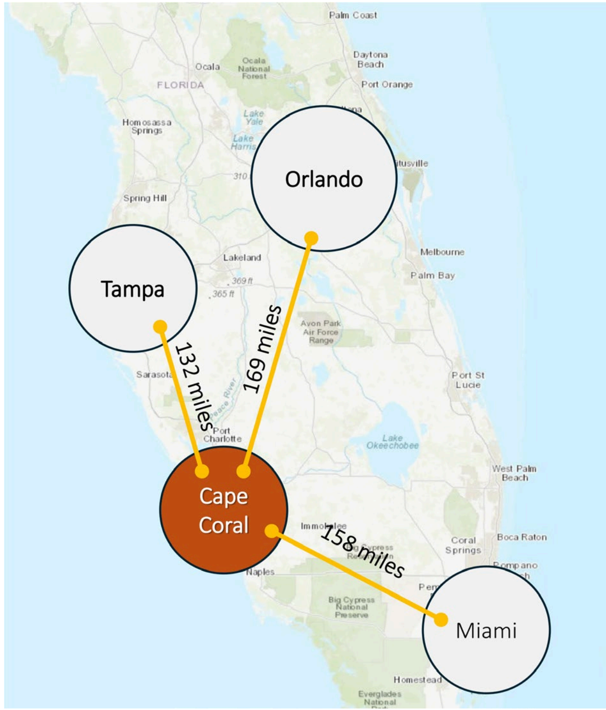
Cape Coral’s employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new “intercept” facilities that can capture some of this worker flow.

With the projected office census of **492** new jobs, it can be expected that at least **234,000 sf** of flex space and **7,200** of retail space will be required to meet the Cluster’s employment needs.

Photo credit: Depositphotos

Competitive Advantages of the City of Cape Coral Location

Cape Coral is in Lee County in Southwest Florida and is the largest population component of the Cape Coral-Fort Myers Metropolitan Statistical Area. The City's location is about an equidistance from the major urban centers of Tampa, Miami, and Orlando.



Originally developed in the late 1950's as a "Waterfront Wonderland", Cape Coral was designed to bring the waterfront dream of home ownership to middle-income Americans. With its over 400 miles of salt and freshwater canals, Cape Coral is a unique community that is redefining its identity beyond being just a suburb of Fort Myers. The City was incorporated in 1970 and maintains a brisk growth pattern despite economic downturns, a pandemic, and severe weather disturbances.

Demographic Advantages

With a current population of approximately **217,000** people, Cape Coral is forecasted to grow to over **375,000** by 2050, representing a nearly **73%** increase. Cape Coral's explosive growth places it among the five fastest growing communities in the nation, measuring more than twice that of the State of Florida.

While more retirees are expected, the City is experiencing a dynamic growth in the working age groups of **25-44 yrs**. By 2029, an overall population gain of about **20,000** new residents will result in **34%** increase in working aged people.

Demographic and market advantages include:

- Growth rate exceeding the State's
- Dynamic growth rate among 25-44 yr. old residents
- Above average number of executive-age workers

- Exemplary rate of English language proficiency
- Above average household size
- Above average median household income
- Above average home ownership rate
- Below average cost of living rate
- Above average good/services industries employment
- Below average services industries hourly wages
- Above average worker mobility patterns
- Below average commercial and industrial electric rates

Higher Education Resources

There are **9** four-year colleges and universities within **50** miles of Cape Coral. In 2022, **9,933** degrees were conferred by the following institutions:

- Florida Gulf Coast University (Fort Myers)
- Florida SouthWestern State College (Fort Myers)
- Southern Technical College (Fort Myers)
- Hodges University (Fort Myers)
- Keiser University-Ft Myers (Fort Myers)
- Rasmussen University-Fort Myers (Fort Myers)
- Ave Maria School of Law (Naples)
- Ave Maria University (Ave Maria)

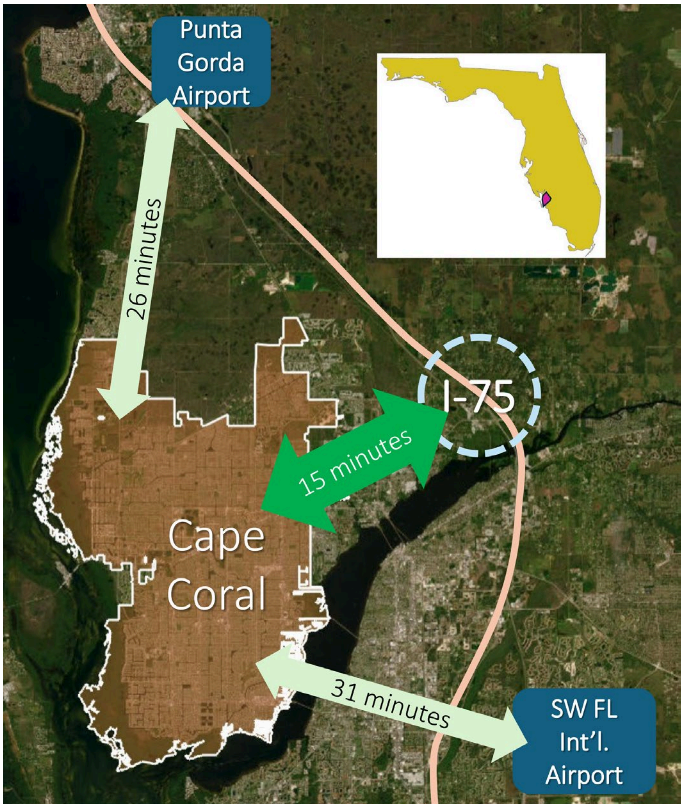
The five most sought after fields of study are:

1. Business, Management, Marketing, and Related Support Services
2. Health Professions and Related Programs
3. Education
4. Multi/Interdisciplinary Studies
5. Psychology

Market Potential

Cape Coral's southwest Florida location can not only cover the total Florida market but a significant portion of the US. Within a 300-mile travel distance (one day truck routing), about **6.1%** of the nation can be reached.

Highway Travel



Interstate 75 (I-75) is within **15 minutes**' drive from Cape Coral. Access to the interstate can be achieved to the eastern direction in North Fort Myers or via one of the bridges through downtown Fort Myers. To the north, access is available in Punta Gorda at a slightly longer travel time.

Air Travel

There are two airports that serve Cape Coral. Southwest Florida International Airport (RSW) is a major facility providing domestic and international flights daily. Travel to RSW is within **31 minutes** from downtown Cape Coral. RSW serves **10.1 million** passengers annually. In 2023, RSW had **87,685** aircraft operations.

Punta Gorda Airport (PGD) in Charlotte County just north of Cape Coral is a regional facility providing domestic flights mainly to the Midwest (Allegiant Air). PGD serves about **1.9 million** passengers per year and had **103,252** aircraft operations in 2023.

Rail Service

Passenger rail service via Amtrak is available in Fort Myers. The system operates **77** daily scheduled trips. Travel from downtown to Fort Myers Station Cape Coral is about **31 minutes**.

Freight rail services are provided by the Seminole Gulf Railway (SGLR). SGLR is a short line freight and passenger excursion railroad headquartered in Fort Myers that operates two former CSX Transportation railroad lines in Southwest Florida.

Bus Service

LeeTran operates bus services in Cape Coral. Currently there are **5** fixed bus routes but expanded services are under development. Looped routes provide transit to and from Fort Myers. The new Ultra On Demand micro-mobility fleet will enhance bus transit capabilities throughout the City.

Lifestyle & Recreational

Cape Coral's riverfront location and unique canal system offer a recreation-oriented lifestyle that has broad-range appeal. Some of the area's tourism advantages are as follows:

- Growing residential population, which can further encourage already existing strong category of visiting friends & family travelers
- Major home rental market for vacationers – over **4,000** homes and **350** private rooms available
- Numerous opportunities to rent a house and boat together, canals enhance rental properties
- Major hotel - Westin Resort at Marina Village – significant anchor for tourism activity
- Favorable location
- Proximity to airports, major highways, and neighboring tourist communities.
- One of safest cities in Florida
- Sports tourism – an already existing, active, and effective government involvement
- Increasingly strong restaurant and food scene
- Water activities – boating, dolphin tours, fishing, kayaking
- Winter warm weather destination
- Major League Baseball Spring Training nearby
- Active events schedule including festivals, parades, and concerts

Contact Information

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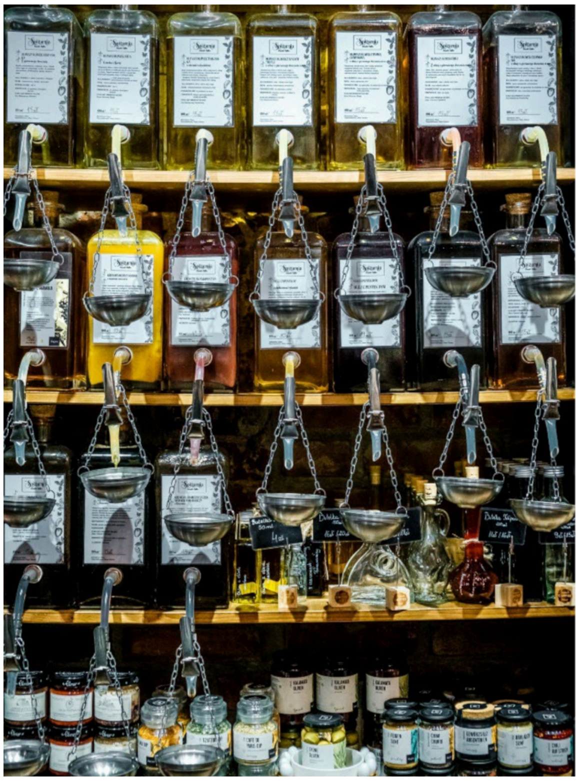

December 2024

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INDUSTRY PROSPECTUS

Competitive Advantages for the Healthcare & Life Sciences Cluster in the City of Cape Coral

City of Cape Coral
Office of Economic & Business Development

This cluster illustrates the regional growth of healthcare and life sciences that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

December 2024

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TABLE OF EXHIBITS

Photo credit: DepositPhotos

Key Findings

- As part of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Healthcare & Life Sciences Cluster.

- The Healthcare & Life Sciences Cluster consists of **11** industry components:
    - General medical and surgical hospitals
    - Psychiatric and substance abuse hospitals
    - Specialty (except psychiatric and substance abuse) hospitals
    - Home health care services
    - Medical and diagnostic laboratories
    - Offices of dentists
    - Offices of physicians
    - Offices of other health practitioners
    - Other ambulatory health care services
    - Outpatient care centers
    - Scientific research and development services

- Revenue (in current dollars) for the Healthcare & Life Sciences Cluster is **$3,342.3 billion**. Growth expectations in the next five years will raise this figure to **$4,052.0. billion**, which is a **3.93%** compound annual growth rate (CAGR), or an overall **21.2%** revenue gain.

- The **11** individual industries that comprise the cluster have projected revenue gains ranging from **41.6%** (Home health services) to **8.3%** (Psychiatric and substance abuse hospitals). In aggregate, the cluster demonstrates solid revenue growth for the next several years.

- Florida ranks in **4th** place for Healthcare & Life Sciences Cluster employment among the **10** leading US states.

- The Cluster has a projected **3,087** new jobs in Cape Coral supportable by the labor market.

- There are **6** Florida cities identified as direct competitors to Cape Coral:
    - Fort Lauderdale

- Orlando
- Palm Bay
- Pompano Beach
- Port St. Lucie
- West Palm Beach

- As an example of typical Cluster business, a Medical Laboratory of **12** persons in Cape Coral will generate **$3.590 million** in annual revenue.

- Profitability for a Medical Laboratory in Cape Coral is **13.7%** which leads all competition.

- Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" facilities that can capture some of this worker flow.

- With the projected office census of **3,087** new jobs, it can be expected that at least **164,000 sf** of office, **15,000 sf** of laboratory, **600,000 sf** of medical, and **215,000 sf** of flex space will be required to meet the Cluster's employment needs.

Introduction

As part of the development of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Healthcare & Life Sciences Cluster.

As defined by Harvard University, "a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support.

The Cluster illustrates the regional growth of healthcare and life sciences industries that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments, capitalizing on untapped labor markets, with good market access to multiple urban centers.

The Cluster consists of **11** industry components:

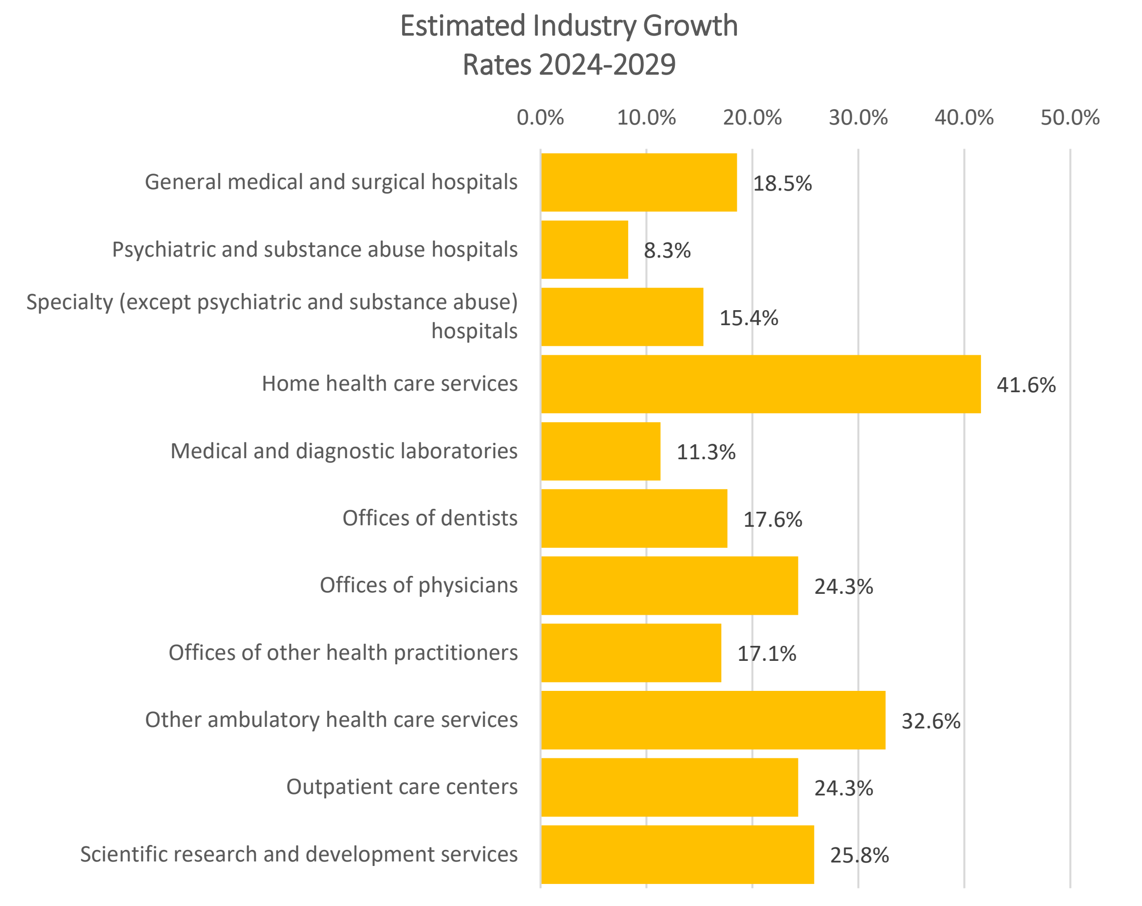
- General medical and surgical hospitals
- Psychiatric and substance abuse hospitals
- Specialty (except psychiatric and substance abuse) hospitals
- Home health care services
- Medical and diagnostic laboratories
- Offices of dentists
- Offices of physicians
- Offices of other health practitioners
- Other ambulatory health care services
- Outpatient care centers
- Scientific research and development services

Industries Performances

Revenue (in current dollars) for the Healthcare & Life Sciences Cluster is **$3,342.3 billion**. Growth expectations in the next five years will raise this figure to **$4,052.0 billion**, which is a **3.9%** compound annual growth rate (CAGR), or an overall **21.2%** revenue gain.

The **11** individual industries that comprise the cluster have projected revenue gains ranging from **54.0%** (Business support services) to **13.9%** (Legal services). In aggregate, the cluster demonstrates solid revenue growth for the next several years. Refer to Exhibit 1 (below).

Exhibit 1 – Industry Performance Projections 2024-2029



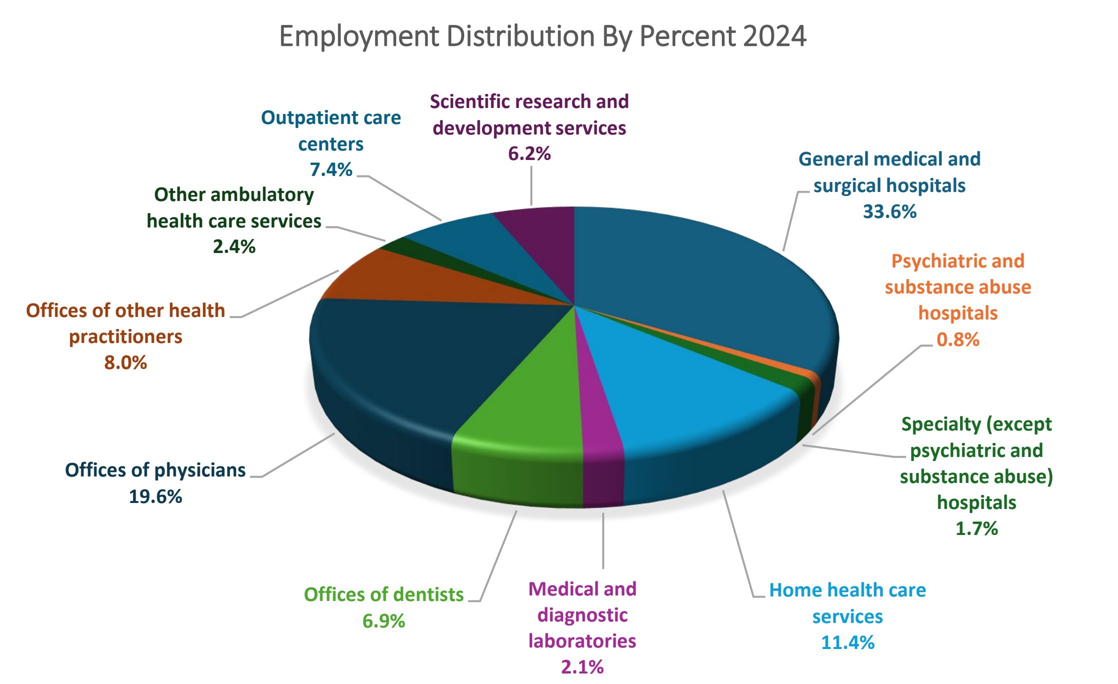
In the following Exhibit 2, each of the component industries are presented with their individual revenue growth expectations, employee productivity evaluation and typical establishment size.

Exhibit 2 – Component Industries Data Aggregation					
General medical and surgical hospitals			Psychiatric and substance abuse hospitals		
	2024	2029		2024	2029
Revenue ($ billion)	$1,417.00	$1,679.70	Revenue ($ billion)	$33.90	$36.70
CAGR	3.46%		CAGR	1.60%	
Revenue Gain ($ billion)	$262.70		Revenue Gain ($ billion)	$2.80	
Revenue Gain (percent)	18.5%		Revenue Gain (percent)	8.3%	
Revenue per employee	$282,566		Revenue per employee	$276,662	
Typ. Estb. Size (US)	445		Typ. Estb. Size (US)	82	
Specialty (except psychiatric and substance abuse) hospitals			Home health care services		
	2024	2029		2024	2029
Revenue ($ billion)	$67.50	$77.87	Revenue ($ billion)	$100.95	$142.92
CAGR	2.90%		CAGR	7.20%	
Revenue Gain ($ billion)	$10.37		Revenue Gain ($ billion)	$41.97	
Revenue Gain (percent)	15.4%		Revenue Gain (percent)	41.6%	
Revenue per employee	$263,016		Revenue per employee	$59,524	
Typ. Estb. Size (US)	108		Typ. Estb. Size (US)	33	
Medical and diagnostic laboratories			Offices of dentists		
	2024	2029		2024	2029
Revenue ($ billion)	$95.89	$106.76	Revenue ($ billion)	$197.77	$232.63
CAGR	2.17%		CAGR	3.30%	
Revenue Gain ($ billion)	$10.87		Revenue Gain ($ billion)	$34.86	
Revenue Gain (percent)	11.3%		Revenue Gain (percent)	17.6%	
Revenue per employee	$306,654		Revenue per employee	$192,257	
Typ. Estb. Size (US)	11		Typ. Estb. Size (US)	8	
Offices of physicians			Offices of other health practitioners		
	2024	2029		2024	2029
Revenue ($ billion)	$305.88	$380.27	Revenue ($ billion)	$86.70	$101.49
CAGR	4.45%		CAGR	3.20%	
Revenue Gain ($ billion)	$74.39		Revenue Gain ($ billion)	$14.79	
Revenue Gain (percent)	24.3%		Revenue Gain (percent)	17.1%	
Revenue per employee	$104,654		Revenue per employee	$72,252	
Typ. Estb. Size (US)	12		Typ. Estb. Size (US)	6	

Other ambulatory health care services			Outpatient care centers		
	2024	2029		2024	2029
Revenue ($ billion)	$5.21	$6.91	Revenue ($ billion)	$740.00	$919.97
CAGR	5.80%		CAGR	4.45%	
Revenue Gain ($ billion)	$1.70		Revenue Gain ($ billion)	$179.97	
Revenue Gain (percent)	32.6%		Revenue Gain (percent)	24.3%	
Revenue per employee	$14,688		Revenue per employee	$669,595	
Typ. Estb. Size (US)	17		Typ. Estb. Size (US)	21	
Scientific research and development services					
	2024	2029			
Revenue ($ billion)	$291.50	$366.75			
CAGR	4.70%				
Revenue Gain ($ billion)	$75.25				
Revenue Gain (percent)	25.8%				
Revenue per employee	$315,234				
Typ. Estb. Size (US)	16				

The distribution of employment in the Healthcare & Life Sciences Cluster is illustrated in Exhibit 3 (below):

Exhibit 3 – US Employment Distribution in the Healthcare & Life Sciences Cluster



For a Florida location, the **4th** place ranking for Healthcare & Life Sciences Cluster employment among the **10** leading states is a favorable condition as shown in Exhibit 4 (below):

Exhibit 4 – Ten Leading States for Healthcare & Life Sciences Cluster Employment		
State	2024 Employment	Rank
California	1,636,788	1
Texas	1,254,525	2
New York	1,192,619	3
Florida	988,810	4
Pennsylvania	696,357	5
Ohio	574,727	6
Illinois	555,871	7
Massachusetts	503,658	8
New Jersey	460,810	9
Michigan	452,443	10

The Fit for Cape Coral

As part of an Economic Development Strategic Plan for Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Healthcare & Life Sciences Cluster. The Cluster contains the **11** component business areas that have a projected **3,087** new jobs supportable by the Cape Coral labor market, as shown in Exhibit 5 (below):

Exhibit 5 - Healthcare & Life Sciences Cluster Employment	
Industry	# of New Jobs
General medical and surgical hospitals	1,515
Psychiatric and substance abuse hospitals	45
Specialty (except psychiatric and substance abuse) hospitals	83
Home health care services	302
Medical and diagnostic laboratories	92
Offices of dentists	22
Offices of physicians	678
Offices of other health practitioners	14
Other ambulatory health care services	106
Outpatient care centers	103

Scientific research and development services	127
Total	**3,087**

For exploratory purposes, the Medical & Diagnostic Laboratories industry has been selected for deeper examination. For this industry category, there is a projected the growth of **92** new jobs. Within this heading are two sub-categories, one of which we will explore in greater detail.

Medical laboratories

- Bacteriological laboratories
- Biological laboratories
- Blood analysis laboratories
- DNA testing laboratories
- Forensic laboratories
- Pathology analysis laboratories
- Toxicology health laboratories
- Urinalysis laboratories

Diagnostic laboratories

- CT-SCAN centers
- Dental X-ray laboratories
- Magnetic resonance imaging
- Mammogram centers
- Medical X-ray laboratories
- Mobile breast imaging centers
- Mobile X-ray facilities
- Radiological laboratories

Medical Laboratories

This U.S. industry comprises establishments known as Blood analysis laboratories primarily engaged in providing analytic or diagnostic services, including body fluid analysis, generally to the medical profession or to the patient on referral from a health practitioner.

Model Operations

The national average size for a Medical Laboratory facility is **11** persons, and the State of Florida's is **12** persons. A nominal facility size of **12** persons is selected as a Cape Coral model for this industry. Average productivity output for Medical Laboratories is **$306,700** per employee, resulting in an annual sales figure of $**3.590 million**. Total investment per employee is estimated at **$323,600**, as shown in Exhibit 6 (below):

Exhibit 6 – Typical Medical Laboratory Operations	
Annual Net sales	$3,590,390
Total Employment	12
Avg. hourly Wage	$32.73
Fringe benefits Percentage	35%
Total Payroll	$1,102,700
Facility Footprint sq. ft.	6,790
Employee Occupancy/sf	580
Floor-Area-Ratio	0.39
Facility Construction Cost/sq. ft.	$357
Facility Construction Cost	$2,427,000
Estimated Furniture, Fixtures & Equipment Cost	$1,214,000
Site Acreage	0.5
Land Cost	$147,500
Total Investment	**$3,788,500**

Staffing

Employment distribution among the relevant major occupational groups for the industry are shown in Exhibit 7 (below):

Exhibit 7 – Medical Laboratories – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Medical and Health Services Managers	1	$59.65	$59.55
Medical Scientists, Except Epidemiologists	1	$58.64	$56.58
Clinical Laboratory Technologists and Technicians	3	$28.10	$31.98
Diagnostic Medical Sonographers	1	$37.40	$39.29
Radiologic Technologists and Technicians	1	$31.56	$32.54
Phlebotomists	2	$19.08	$19.65
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	1	$35.11	$30.80
Customer Service Representatives	1	$19.64	$19.27
Medical Secretaries and Administrative Assistants	1	$19.30	$19.43
Total	**12**		
Average Hourly Wage		**$31.98**	**$32.73**

Labor Capability

Available labor is calculated by using both the current unemployment rate (U3) for the Cape Coral-Fort Myers MSA and the factored under-employment rate[1] (U6) from the Bureau of Labor Statistics. For the target of **92** new jobs for the industry sector, the Employee Census table from above is revisited with the overall new job requirements shown in Exhibit 8 (below).

Exhibit 8 - Medical Laboratories – Occupations Needed	
Occupation	# of new jobs
Medical and Health Services Managers	8
Medical Scientists, Except Epidemiologists	8
Clinical Laboratory Technologists and Technicians	22
Diagnostic Medical Sonographers	8
Radiologic Technologists and Technicians	8
Phlebotomists	14
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	8
Customer Service Representatives	8
Medical Secretaries and Administrative Assistants	8
Total Occupations Required	**92**

In the following, the **9** categories of staffing for Medical Laboratories are evaluated for direct hiring capabilities:

11-9111 - Medical and Health Services Managers
In the Cape Coral-Fort Myers MSA, there are currently **1,000** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **69** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

19-1042 - Medical Scientists, Except Epidemiologists
In MSA, there are currently **40** persons employed in this position. It is estimated that there are approximately **3** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

[1] U6: Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

29-2010 - Clinical Laboratory Technologists and Technicians
In MSA, there are currently **690** persons employed in this position. It is estimated that there are approximately **48** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

29-2032 - Diagnostic Medical Sonographers
In the MSA, there are currently **150** persons employed in this position. It is estimated that there are approximately **10** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

29-2034 - Radiologic Technologists and Technicians
In the MSA, there are currently **500** persons employed in this position. It is estimated that there are approximately **35** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

31-9097 - Phlebotomists
In the s MSA, there are currently **150** persons employed in this position. It is estimated that there are approximately **10** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

41-3091 - Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel
In the MSA, there are currently **3,600** persons employed in this position. It is estimated that there are approximately **250** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-4051 - Customer Service Representatives
In the MSA, there are currently **7,320** persons employed in this position. It is estimated that there are approximately **509** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-6013 - Medical Secretaries and Administrative Assistants
In the MSA, there are currently **1,950** persons employed in this position. It is estimated that there are approximately **136** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, staffing for a Medical Laboratory in Cape Coral is projected to be quite achievable. However, the positions that exhibit shortfall are:

- Medical Scientists, Except Epidemiologists
- Phlebotomists

The economic development and workforce officials in Cape Coral have been alerted to these employment shortfall issues. New initiatives are in development that will increase labor availability in these two areas.

Comparison Analyses

The objective of this section is the determination of which Florida cities are Cape Coral's true competition, not just Fort Myers or another Southwest Florida community. To accomplish this evaluation, a review of **22** municipalities in Florida with a population of **100,000** or more was conducted. Through analysis of population growth for each of the as compared to annual rate for the State of Florida, **6** cities emerged as true competitors to Cape Coral:

- Fort Lauderdale
- Orlando
- Palm Bay
- Pompano Beach
- Port St. Lucie
- West Palm Beach

Profitability Determination

Base financial information is shown in Exhibit 9 (below):

Exhibit 9 - Medical Laboratories – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$147,000**	**$119**	**$1,160,000**	**$1,300,000**	**$1,045,600**	**$82,200**
Fort Lauderdale	$295,000	$147,500	$357	$2,427,000	$3,788,500	$3,030,800	$238,100
Orlando	$1,437,000	$718,500	$374	$2,537,000	$4,469,500	$3,575,600	$280,900
Palm Bay	$201,000	$100,500	$368	$2,500,000	$3,814,500	$3,051,600	$239,800
Pompano Beach	$494,000	$247,000	$390	$2,647,000	$4,108,000	$3,286,400	$258,200
Port St. Lucie	$2,057,000	$1,028,500	$374	$2,537,000	$4,779,500	$3,823,600	$300,400
West Palm Beach	$146,000	$73,000	$364	$2,470,000	$3,757,000	$3,005,600	$236,200

Profitability for a Medical Laboratory in Cape Coral is **13.7%** which leads all competition, as shown in Exhibit 10 (below):

Exhibit 10 - Medical Laboratories – Competitive Evaluation – Annual Operating Profits							
Market	**Cape Coral**	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Annual Net sales	**100.0%**	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Payroll (incl. benefits)	**30.0%**	30.7%	30.6%	28.4%	30.0%	30.6%	28.2%
Utilities & Fuels	**17.2%**	21.6%	18.7%	21.6%	21.7%	21.6%	21.6%
Debt Service	**6.6%**	7.8%	6.7%	7.2%	8.4%	6.6%	7.4%
Materials	**9.0%**	9.0%	9.0%	9.0%	9.0%	9.0%	9.0%
Cost of goods sold	**62.8%**	69.1%	65.0%	66.2%	69.1%	67.7%	66.2%
Annual Gross profit	**37.2%**	30.9%	35.0%	33.8%	30.9%	32.3%	33.8%
Less: Sales exp.	**8.5%**	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%
General & Administrative. Overhead	**15.0%**	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Total Operating expenses	**23.5%**	**23.5%**	**23.5%**	**23.5%**	**23.5%**	**23.5%**	**23.5%**
Annual Net Profit before taxes	**13.7%**	7.4%	11.5%	10.3%	7.4%	8.8%	10.3%

Summary

The Healthcare & Life Sciences Cluster illustrates the regional growth of healthcare and life sciences that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

Metrics for the Cluster and its component industries all indicate positive revenue growth for the next five years. The Cluster is essentially a mix of office, laboratory, medical, and flex space users. The Healthcare and Life Sciences industry is flourishing in Florida, partially due to the following advantages:

Business-friendly policies

Florida offers a favorable tax and business climate, including no state income tax.

Strong workforce

Florida's diverse economy and strong workforce support the labor force.

Proximity to markets

Florida's location near buyers, suppliers, labor, and transportation allows companies to cut costs and develop close relationships with the community.

For Cape Coral, operations such as Medical Laboratories will be profitable endeavors. The City and the MSA have a dynamic labor supply that is well suited to meet the needs of the Healthcare & Life Services Cluster.

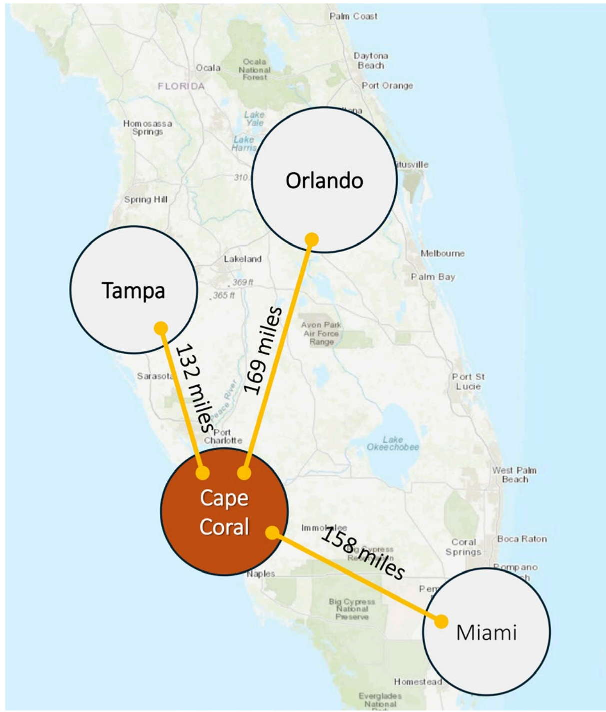
Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" facilities that can capture some of this worker flow.

With the projected office census of **3,087** new jobs, it can be expected that at least **164,000 sf** of office, **15,000 sf** of laboratory, **600,000 sf** of medical, and **215,000 sf** of flex space will be required to meet the Cluster's employment needs.

Photo credit: Depositphotos

Competitive Advantages of the City of Cape Coral Location

Cape Coral is in Lee County in Southwest Florida and is the largest population component of the Cape Coral-Fort Myers Metropolitan Statistical Area. The City's location is about an equidistance from the major urban centers of Tampa, Miami, and Orlando.



Originally developed in the late 1950's as a "Waterfront Wonderland", Cape Coral was designed to bring the waterfront dream of home ownership to middle-income Americans. With its over 400 miles of salt and freshwater canals, Cape Coral is a unique community that is redefining its identity beyond being just a suburb of Fort Myers. The City was incorporated in 1970 and maintains a brisk growth pattern despite economic downturns, a pandemic, and severe weather disturbances.

Demographic Advantages

With a current population of approximately **217,000** people, Cape Coral is forecasted to grow to over **375,000** by 2050, representing a nearly **73%** increase. Cape Coral's explosive growth places it among the five fastest growing communities in the nation, measuring more than twice that of the State of Florida.

While more retirees are expected, the City is experiencing a dynamic growth in the working age groups of **25-44 yrs**. By 2029, an overall population gain of about **20,000** new residents will result in **34%** increase in working aged people.

Demographic and market advantages include:

- Growth rate exceeding the State's
- Dynamic growth rate among 25-44 yr. old residents
- Above average number of executive-age workers

- Exemplary rate of English language proficiency
- Above average household size
- Above average median household income
- Above average home ownership rate
- Below average cost of living rate
- Above average good/services industries employment
- Below average services industries hourly wages
- Above average worker mobility patterns
- Below average commercial and industrial electric rates

Higher Education Resources

There are **9** four-year colleges and universities within **50** miles of Cape Coral. In 2022, **9,933** degrees were conferred by the following institutions:

- Florida Gulf Coast University (Fort Myers)
- Florida SouthWestern State College (Fort Myers)
- Southern Technical College (Fort Myers)
- Hodges University (Fort Myers)
- Keiser University-Ft Myers (Fort Myers)
- Rasmussen University-Fort Myers (Fort Myers)
- Ave Maria School of Law (Naples)
- Ave Maria University (Ave Maria)

The five most sought after fields of study are:

1. Business, Management, Marketing, and Related Support Services
2. Health Professions and Related Programs
3. Education
4. Multi/Interdisciplinary Studies
5. Psychology

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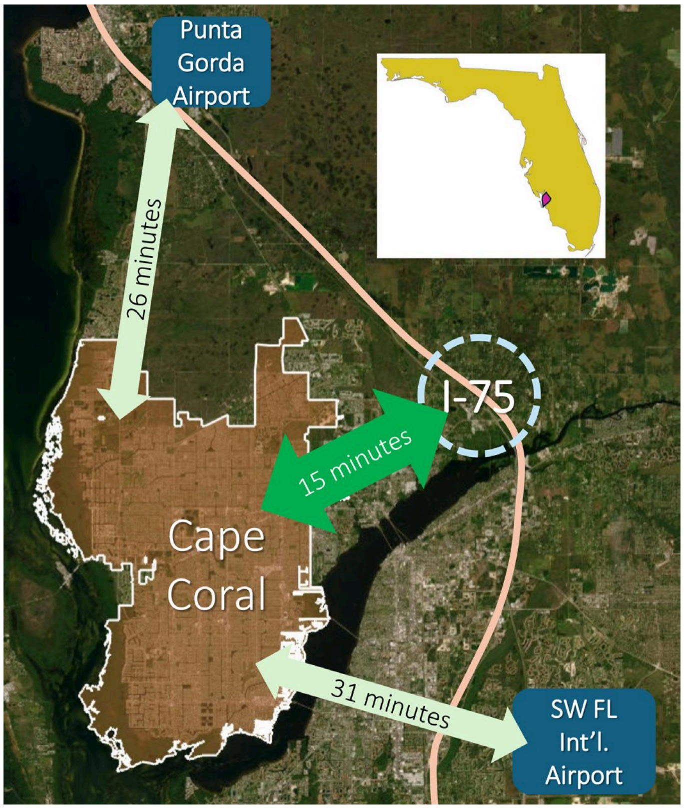
Market Potential

Cape Coral's southwest Florida location can not only cover the total Florida market but a significant portion of the US. Within a 300-mile travel distance (one day truck routing), about **6.1%** of the nation can be reached.

Highway Travel

Interstate 75 (I-75) is within **15 minutes**' drive from Cape Coral. Access to the interstate can be achieved to the eastern direction in North Fort Myers or via one of the bridges through downtown Fort Myers. To the north, access is available in Punta Gorda at a slightly longer travel time.



Air Travel

There are two airports that serve Cape Coral. Southwest Florida International Airport (RSW) is a major facility providing domestic and international flights daily. Travel to RSW is within **31 minutes** from downtown Cape Coral. RSW serves **10.1 million** passengers annually. In 2023, RSW had **87,685** aircraft operations.

Punta Gorda Airport (PGD) in Charlotte County just north of Cape Coral is a regional facility providing domestic flights mainly to the Midwest (Allegiant Air). PGD serves about **1.9 million** passengers per year and had **103,252** aircraft operations in 2023.

Rail Service

Passenger rail service via Amtrak is available in Fort Myers. The system operates **77** daily scheduled trips. Travel from downtown to Fort Myers Station Cape Coral is about **31 minutes**.

Freight rail services are provided by the Seminole Gulf Railway (SGLR). SGLR is a short line freight and passenger excursion railroad headquartered in Fort Myers that operates two former CSX Transportation railroad lines in Southwest Florida.

Bus Service

LeeTran operates bus services in Cape Coral. Currently there are **5** fixed bus routes but expanded services are under development. Looped routes provide transit to and from Fort Myers. The new Ultra On Demand micro-mobility fleet will enhance bus transit capabilities throughout the City.

Lifestyle & Recreational

Cape Coral's riverfront location and unique canal system offer a recreation-oriented lifestyle that has broad-range appeal. Some of the area's tourism advantages are as follows:

- Growing residential population, which can further encourage already existing strong category of visiting friends & family travelers
- Major home rental market for vacationers – over **4,000** homes and **350** private rooms available
- Numerous opportunities to rent a house and boat together, canals enhance rental properties
- Major hotel - Westin Resort at Marina Village – significant anchor for tourism activity
- Favorable location
- Proximity to airports, major highways, and neighboring tourist communities.
- One of safest cities in Florida
- Sports tourism – an already existing, active, and effective government involvement
- Increasingly strong restaurant and food scene
- Water activities – boating, dolphin tours, fishing, kayaking
- Winter warm weather destination
- Major League Baseball Spring Training nearby
- Active events schedule including festivals, parades, and concerts

Contact Information

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December 2024

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INDUSTRY PROSPECTUS

Competitive Advantages for the Industrial Services Cluster in the City of Cape Coral

City of Cape Coral
Office of Economic & Business Development

This cluster illustrates the regional growth of manufacturing and industrial services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

December 2024

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TABLE OF EXHIBITS

Photo credit: DepositPhotos

Key Findings

- As part of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Industrial Services Cluster.

- The Industrial Services Cluster consists of **7** industry components:
  - Coating, engraving, heat treating, and allied activities
  - Machine shops; turned product; and screw, nut, and bolt manufacturing
  - Other fabricated metal product manufacturing
  - Machinery, equipment, and supplies wholesale
  - Metal and mineral (except petroleum) wholesale
  - Fuel dealers
  - Commercial and industrial machinery and equipment repair and maintenance

- Revenue (in current dollars) for the Industrial Services Cluster is **$1,265.0 billion**. Growth expectations in the next five years will raise this figure to **$1,316.9 billion**, which is a **0.81%** compound annual growth rate (CAGR), or an overall **4.1%** revenue gain.

- The **7** individual industries that comprise the cluster have projected revenue gains ranging from **20.5%** (Machine shops; turned product; and screw, nut, and bolt manufacturing) to **0.5%** (Metal and mineral (except petroleum) wholesale). In aggregate, the cluster demonstrates solid revenue growth for the next several years.

- Florida ranks in **7th** place for Industrial Services Cluster employment among the **10** leading US states.

- The Cluster has a projected **768** new jobs in Cape Coral supportable by the labor market.

- There are **6** Florida cities identified as direct competitors to Cape Coral:
  - Fort Lauderdale
  - Orlando
  - Palm Bay
  - Pompano Beach
  - Port St. Lucie

- West Palm Beach

- As an example of typical Cluster business, a Plumbing Fixture Fittings & Trim Mfg. Facility of **23** persons in Cape Coral will generate **$17.397 million** in annual revenue.

- Profitability for a Plumbing Fixture Fittings & Trim Mfg. Facility in Cape Coral is **14.8%** which leads all competition with the exception of Port St. Lucie.

- Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" facilities that can capture some of this worker flow.

- With the projected office census of **768 n**ew jobs, it can be expected that at least **197,000 sf** of flex space and **563,000** of warehouse space will be required to meet the Cluster's employment needs.

Introduction

As part of the development of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Industrial Services Cluster.

As defined by Harvard University, “a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support.

This cluster illustrates the regional growth of manufacturing and industrial services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

The Cluster consists of **7** industry components:

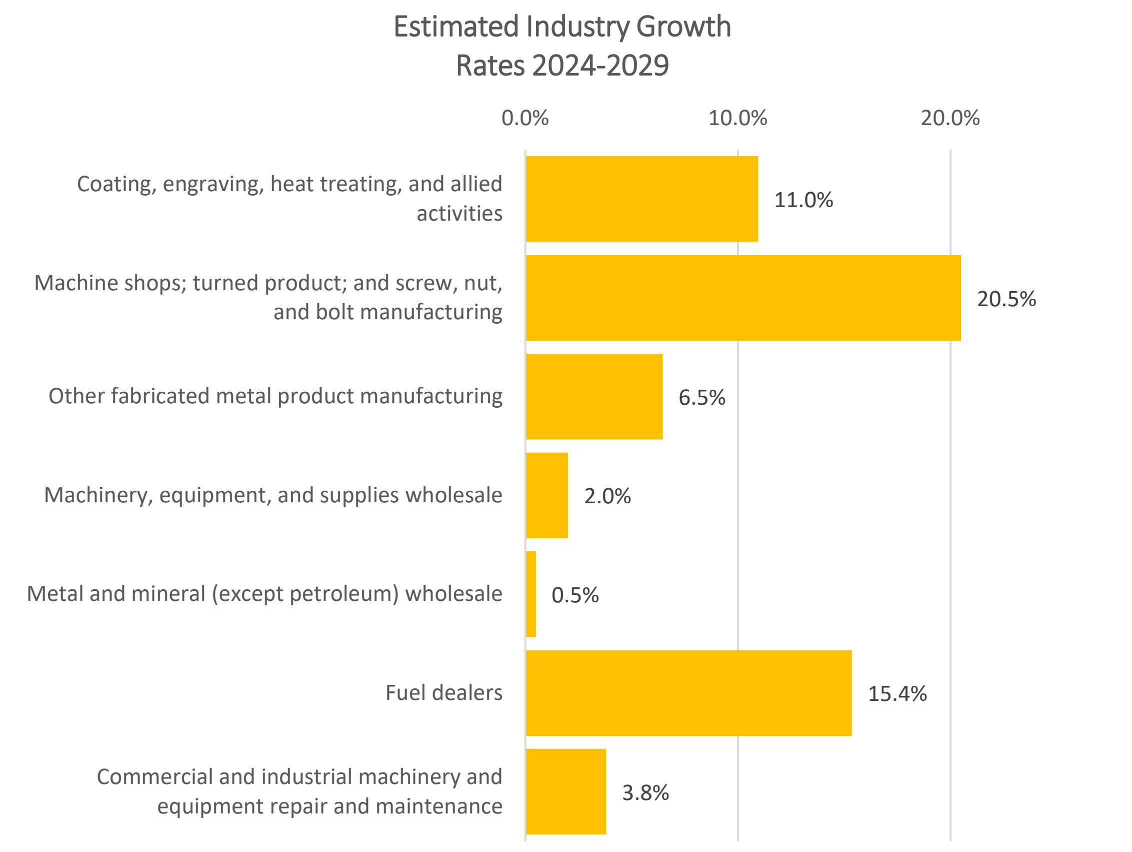
- Coating, engraving, heat treating, and allied activities
- Machine shops; turned product; and screw, nut, and bolt manufacturing
- Other fabricated metal product manufacturing
- Machinery, equipment, and supplies wholesale
- Metal and mineral (except petroleum) wholesale
- Fuel dealers
- Commercial and industrial machinery and equipment repair and maintenance

Industries Performances

Revenue (in current dollars) for the Industrial Services Cluster is **$1,265.0 billion**. Growth expectations in the next five years will raise this figure to **$1,316.9 billion**, which is a **0.81%** compound annual growth rate (CAGR), or an overall **4.1%** revenue gain.

The **7** individual industries that comprise the cluster have projected revenue gains ranging from **20.5%** (Machine shops; turned product; and screw, nut, and bolt manufacturing) to **0.5%** (Metal and mineral (except petroleum) wholesale). In aggregate, the cluster demonstrates solid revenue growth for the next several years. Refer to Exhibit 1 (below).

Exhibit 1 – Industry Performance Projections 2024-2029



In the following Exhibit 2, each of the component industries are presented with their individual revenue growth expectations, employee productivity evaluation and typical establishment size.

Exhibit 2 – Component Industries Data Aggregation

Coating, engraving, heat treating, and allied activities	2024	2029
Revenue ($ billion)	$25.90	$28.74
CAGR	2.10%	
Revenue Gain ($ billion)	$2.84	
Revenue Gain (percent)	11.0%	
Revenue per employee	$198,600	
Typ. Estb. Size (US)	21	

Machine shops; turned product; and screw, nut, and bolt manufacturing	2024	2029
Revenue ($ billion)	$31.80	$38.32
CAGR	3.80%	
Revenue Gain ($ billion)	$6.52	
Revenue Gain (percent)	20.5%	
Revenue per employee	$94,900	
Typ. Estb. Size (US)	16	

Other fabricated metal product manufacturing	2024	2029
Revenue ($ billion)	$211.30	$224.95
CAGR	1.26%	
Revenue Gain ($ billion)	$13.65	
Revenue Gain (percent)	6.5%	
Revenue per employee	$756,400	
Typ. Estb. Size (US)	31	

Machinery, equipment, and supplies wholesale	2024	2029
Revenue ($ billion)	$321.00	$327.47
CAGR	0.40%	
Revenue Gain ($ billion)	$6.47	
Revenue Gain (percent)	2.0%	
Revenue per employee	$415,800	
Typ. Estb. Size (US)	10	

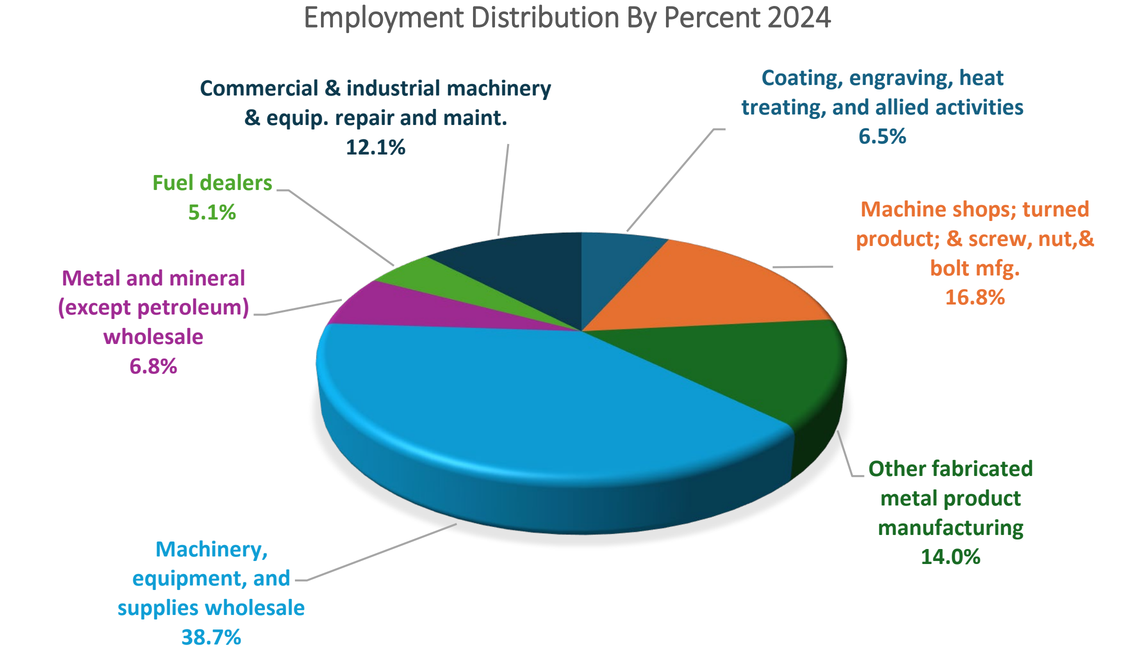
Metal and mineral (except petroleum) wholesale	2024	2029
Revenue ($ billion)	$270.40	$271.75
CAGR	0.10%	
Revenue Gain ($ billion)	$1.35	
Revenue Gain (percent)	0.5%	
Revenue per employee	$2,008,200	
Typ. Estb. Size (US)	12	

Fuel dealers	2024	2029
Revenue ($ billion)	$49.00	$56.53
CAGR	2.90%	
Revenue Gain ($ billion)	$7.53	
Revenue Gain (percent)	15.4%	
Revenue per employee	$484,000	
Typ. Estb. Size (US)	12	

Commercial and industrial machinery and equipment repair and maintenance	2024	2029
Revenue ($ billion)	$355.57	$369.11
CAGR	0.75%	
Revenue Gain ($ billion)	$13.54	
Revenue Gain (percent)	3.8%	
Revenue per employee	$1,474,900	
Typ. Estb. Size (US)	8	

The distribution of employment in the Industrial Services Cluster is illustrated in Exhibit 3 (below):

Exhibit 3 – US Employment Distribution in the Industrial Services Cluster



For a Florida location, the **7th** place ranking for the Industrial Services Cluster employment among the **10** leading states is a favorable condition as shown in Exhibit 4 (below):

Exhibit 4 – Ten Leading States for the Industrial Services Cluster Employment

State	2024 Employment	Rank
Texas	242,564	1
California	165,795	2
Illinois	119,130	3
Ohio	113,381	4
Michigan	89,440	5
Pennsylvania	80,479	6
Florida	77,209	7
Wisconsin	72,043	8
Indiana	68,454	9
North Carolina	61,122	10

The Fit for Cape Coral

As part of an Economic Development Strategic Plan for Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Industrial Services Cluster. The Cluster contains the **7** component business areas that have a projected **768** new jobs supportable by the Cape Coral labor market, as shown in Exhibit 5 (below):

Exhibit 5 - the Industrial Services Cluster Employment	
Industry	# of New Jobs
Coating, engraving, heat treating, and allied activities	90
Machine shops; turned product; and screw, nut, and bolt manufacturing	36
Other fabricated metal product manufacturing	105
Machinery, equipment, and supplies wholesale	75
Metal and mineral (except petroleum) wholesale	267
Fuel dealers	33
Commercial and industrial machinery and equipment repair and maintenance	162
Total	**768**

For exploratory purposes, the Other Fabricated Metal Product Manufacturing industry has been selected for deeper examination. For this industry category, there is a projected the growth of **105** new jobs. Within this heading are several sub-categories, one of which we will explore in greater detail.

- Fluid power valves & hoses
- Plumbing fixture fittings & trim mfg.
- Ball & roller bearings
- Ammunition
- Small arms
- Fabricated pipe
- Steel wool

Plumbing Fixture Fittings & Trim Manufacturing

This U.S. industry comprises establishments primarily engaged in manufacturing plumbing fixture fittings and trim of all materials, such as faucets, flush valves, and shower heads.

Model Operations

The national average size for a Plumbing Fixture Fittings & Trim Mfg. facility is 41 persons, and the State of Florida's is 6 persons. A nominal facility size of 23 persons is selected as a Cape Coral model for this industry. Average productivity output for Plumbing Fixture Fittings & Trim Mfg. is **$756,400** per employee, resulting in an annual sales figure of **$17.397 million**. Total investment per employee is estimated at **$57,400**, as shown in Exhibit 6 (below):

Exhibit 6 – Typical Plumbing Fixture Fittings & Trim Mfg. Facility Operations	
Annual Net sales	$17,397,200
Total Employment	23
Avg. hourly Wage	$29.10
Fringe benefits Percentage	30%
Total Payroll	$1,810,000
Facility Footprint sq. ft.	11,500
Employee Occupancy/sf	500
Floor-Area-Ratio	0.37
Facility Construction Cost/sq. ft.	$83
Facility Construction Cost	$949,000
Estimated Equipment Cost (annual carry)	$150,000
Site Acreage	0.75
Land Cost	$221,300
Total Investment	**$1,320,300**

Staffing

Employment distribution among the relevant major occupational groups for the industry is shown in Exhibit 7 (below):

Exhibit 7 – Plumbing Fixture Fittings & Trim Mfg. Facility – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Industrial Production Managers	1	$58.66	$56.73
General and Operations Managers	1	$62.84	$56.48
Industrial Engineers	1	$52.81	$55.69
Mechanical Engineers	1	$48.08	$45.22
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	1	$36.15	$34.02

Customer Service Representatives	1	$19.64	$19.27
Production, Planning, and Expediting Clerks	1	$25.65	$24.00
Shipping, Receiving, and Inventory Clerks	1	$19.27	$19.05
Office Clerks, General	1	$20.66	$21.00
Industrial Machinery Mechanics	1	$28.16	$28.04
Maintenance and Repair Workers, General	1	$21.14	$21.19
First-Line Supervisors of Production and Operating Workers	1	$31.70	$30.97
Machinists	4	$96.72	$23.48
Welders, Cutters, Solderers, and Brazers	2	$28.76	$29.48
Inspectors, Testers, Sorters, Samplers, and Weighers	1	$47.36	$24.79
Computer Numerically Controlled Tool Operators	1	$23.15	$22.84
Production Workers, All Other	1	$22.55	$26.77
Laborers and Freight, Stock, and Material Movers, Hand	1	$17.92	$17.26
Total	**23**		
Average Hourly Wage		**$29.52**	**$29.10**

Labor Capability

Available labor is calculated by using both the current unemployment rate (U3) for the Cape Coral-Fort Myers MSA and the factored under-employment rate[1] (U6) from the Bureau of Labor Statistics. For the target of **105** new jobs for the industry sector, the Employee Census table from above is revisited with the overall new job requirements shown in Exhibit 8 (below).

Exhibit 8 - Plumbing Fixture Fittings & Trim Mfg. Facility – Occupations Needed	
Occupation	# of new jobs
Industrial Production Managers	5
General and Operations Managers	5
Industrial Engineers	5
Mechanical Engineers	5
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	5
Customer Service Representatives	5
Production, Planning, and Expediting Clerks	5
Shipping, Receiving, and Inventory Clerks	5
Office Clerks, General	5
Industrial Machinery Mechanics	5

[1] U6: Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

Maintenance and Repair Workers, General	5
First-Line Supervisors of Production and Operating Workers	5
Machinists	13
Tool and Die Makers	5
Welders, Cutters, Solderers, and Brazers	7
Inspectors, Testers, Sorters, Samplers, and Weighers	5
Computer Numerically Controlled Tool Operators	5
Production Workers, All Other	5
Laborers and Freight, Stock, and Material Movers, Hand	5
Total Occupations Required	**105**

In the following, the **19** categories of staffing for a Plumbing Fixture Fittings & Trim Mfg. Facility are evaluated for direct hiring capabilities:

Industrial Production Managers

In the Cape Coral-Fort Myers MSA, there are currently **200** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **14** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

General and Operations Managers

In the MSA, there are currently **6,110** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **425** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Industrial Engineers

In the MSA, there are currently **200** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **14** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Mechanical Engineers

In the MSA, there are currently **120** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **8** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products

In the MSA, there are currently **2,460** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **171** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Customer Service Representatives

In the MSA, there are currently **7,620** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **529** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Production, Planning, and Expediting Clerks

In the MSA, there are currently **520** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **36** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Shipping, Receiving, and Inventory Clerks

In the MSA, there are currently **1,040** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **72** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Office Clerks, General

In the MSA, there are currently **5,850** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **407** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Industrial Machinery Mechanics

In the MSA, there are currently **340** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **24** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Maintenance and Repair Workers, General

In the MSA, there are currently **3,390** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **236** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

First-Line Supervisors of Production and Operating Workers

In the MSA, there are currently **700** persons employed in this position. Using the U6 factor,

it is estimated that there are approximately **49** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Machinists

In the MSA, there are currently **140** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **10** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Tool and Die Makers

In the MSA, there are currently **0** reported persons employed in this position. Direct hiring outcome is **Problematic** for this position.

Welders, Cutters, Solderers, and Brazers

In the MSA, there are currently **490** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **34** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Inspectors, Testers, Sorters, Samplers, and Weighers

In the MSA, there are currently **270** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **19** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Computer Numerically Controlled Tool Operators

In the MSA, there are currently **110** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **8** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Production Workers, All Other

In the MSA, there are currently **140** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **10** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Laborers and Freight, Stock, and Material Movers, Hand

In the MSA, there are currently **3,810** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **265** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, staffing for a Plumbing Fixture Fittings & Trim Mfg. Facility in Cape Coral is projected to be quite achievable. However, the position that exhibits a shortfall is:

- Tool and Die Makers

The economic development and workforce officials in Cape Coral have been alerted to the employment shortfall issue. New initiatives are in development that will increase labor availability in this area.

Comparison Analyses

The objective of this section is the determination of which Florida cities are Cape Coral's true competition, not just Fort Myers or another Southwest Florida community. To accomplish this evaluation, a review of **22** municipalities in Florida with a population of **100,000** or more was conducted. Through analysis of population growth for each of the as compared to annual rate for the State of Florida, **6** cities emerged as true competitors to Cape Coral:

- Fort Lauderdale
- Orlando
- Palm Bay
- Pompano Beach
- Port St. Lucie
- West Palm Beach

Profitability Determination

Base financial information is shown in Exhibit 9 (below):

Exhibit 9 - Plumbing Fixture Fittings & Trim Mfg. Facility – Competitive Evaluation – Base Financial Data

Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$221,300**	**$83**	**$1,116,000**	**$1,337,300**	**$1,069,800**	**$115,600**
Fort Lauderdale	$1,437,000	$1,077,800	$86	$1,159,000	$2,236,800	$1,789,400	$193,400
Orlando	$201,000	$150,800	$85	$1,145,000	$1,295,800	$1,036,600	$112,000

Palm Bay	$494,000	$370,500	$90	$1,203,000	$1,573,500	$1,258,800	$136,000
Pompano Beach	$2,057,000	$1,542,800	$86	$1,159,000	$2,701,800	$2,161,400	$233,600
Port St. Lucie	$146,000	$109,500	$83	$1,121,000	$1,230,500	$984,400	$106,400
West Palm Beach	$975,000	$731,300	$88	$1,181,000	$1,912,300	$1,529,800	$165,300

Profitability for a Plumbing Fixture Fittings & Trim Mfg. Facility in Cape Coral is **14.4%** which leads all competition with the exception of Port St. Lucie, as shown in Exhibit 10 (below):

Exhibit 10 - Plumbing Fixture Fittings & Trim Mfg. Facility – Competitive Evaluation – Annual Operating Profits

Market	**Cape Coral**	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	**100.0%**	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Payroll	**10.4%**	10.8%	10.5%	10.7%	10.8%	10.1%	10.8%
Utilities & Fuels	**15.0%**	15.0%	17.2%	15.0%	14.9%	15.0%	15.0%
Materials	**35.0%**	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%
Debt Service	**0.7%**	1.1%	0.6%	0.8%	1.3%	0.6%	1.0%
Cost of goods sold	**61.1%**	61.9%	63.3%	61.5%	62.1%	60.7%	61.8%
Annual Gross profit	**38.9%**	38.1%	36.7%	38.5%	37.9%	39.3%	38.2%
Less: Sales exp.	**11.0%**	11.0%	11.0%	11.0%	11.0%	11.0%	11.0%
General & Administrative. Overhead	**13.5%**	13.5%	13.5%	13.5%	13.5%	13.5%	13.5%
Total Operating expenses	**24.5%**	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%
Annual Net Profit before taxes	**14.4%**	13.6%	12.2%	14.0%	13.4%	14.8%	13.7%

Summary

The Industrial Services Cluster illustrates the regional growth of manufacturing and industrial services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

Metrics for the Cluster and its component industries all indicate positive revenue growth for the next five years. The Cluster is essentially a mix of flex and warehouse space users. The Industrial Services industry is flourishing in Florida, partially due to the following advantages:

Business-friendly policies

Florida offers a favorable tax and business climate, including no state income tax.

Strong workforce

Florida's diverse economy and strong workforce support the labor force.

Proximity to markets

Florida's location near buyers, suppliers, labor, and transportation allows companies to cut costs and develop close relationships with the community.

For Cape Coral, operations such as Plumbing Fixture Fittings & Trim Mfg. will be profitable endeavors. The City and the MSA have a dynamic labor supply that is well suited to meet the needs of the Industrial Services Cluster.

Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" industrial facilities that can capture some of this worker flow.

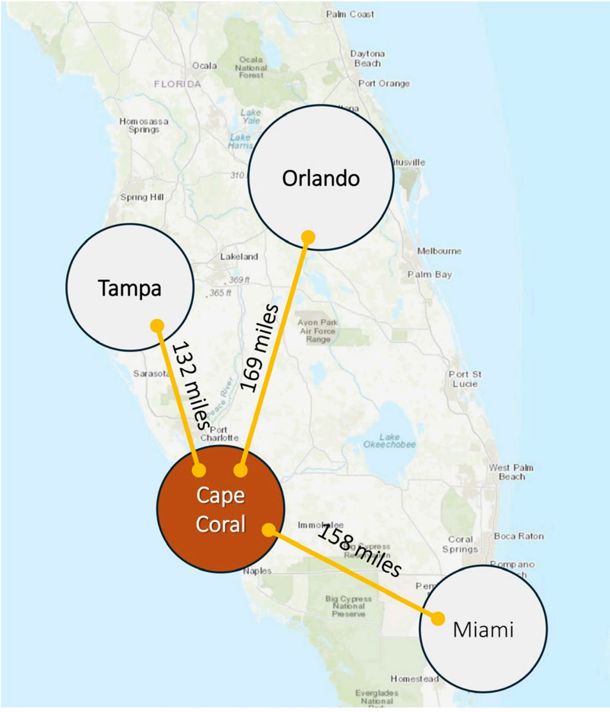
With the projected office census of **768** new jobs, it can be expected that at least **197,000 sf** of flex space and **563,000** of warehouse space will be required to meet the Cluster's employment needs.

Photo credit: Depositphotos

Competitive Advantages of the City of Cape Coral Location

Cape Coral is in Lee County in Southwest Florida and is the largest population component of the Cape Coral-Fort Myers Metropolitan Statistical Area. The City's location is about an equidistance from the major urban centers of Tampa, Miami, and Orlando.

Originally developed in the late 1950's as a "Waterfront Wonderland", Cape Coral was designed to bring the waterfront dream of home ownership to middle-income Americans. With its over 400 miles of salt and freshwater canals, Cape Coral is a unique community that is redefining its identity beyond being just a suburb of Fort Myers. The City was incorporated in 1970 and maintains a brisk growth pattern despite economic downturns, a pandemic, and severe weather disturbances.



Demographic Advantages

With a current population of approximately **217,000** people, Cape Coral is forecasted to grow to over **375,000** by 2050, representing a nearly **73%** increase. Cape Coral's explosive growth places it among the five fastest growing communities in the nation, measuring more than twice that of the State of Florida.

While more retirees are expected, the City is experiencing a dynamic growth in the working age groups of **25-44 yrs**. By 2029, an overall population gain of about **20,000** new residents will result in **34%** increase in working aged people.

Demographic and market advantages include:

- Growth rate exceeding the State's
- Dynamic growth rate among 25-44 yr. old residents
- Above average number of executive-age workers

- Exemplary rate of English language proficiency
- Above average household size
- Above average median household income
- Above average home ownership rate
- Below average cost of living rate
- Above average good/services industries employment
- Below average services industries hourly wages
- Above average worker mobility patterns
- Below average commercial and industrial electric rates

Higher Education Resources

There are **9** four-year colleges and universities within **50** miles of Cape Coral. In 2022, **9,933** degrees were conferred by the following institutions:

- Florida Gulf Coast University (Fort Myers)
- Florida SouthWestern State College (Fort Myers)
- Southern Technical College (Fort Myers)
- Hodges University (Fort Myers)
- Keiser University-Ft Myers (Fort Myers)
- Rasmussen University-Fort Myers (Fort Myers)
- Ave Maria School of Law (Naples)
- Ave Maria University (Ave Maria)

The five most sought after fields of study are:

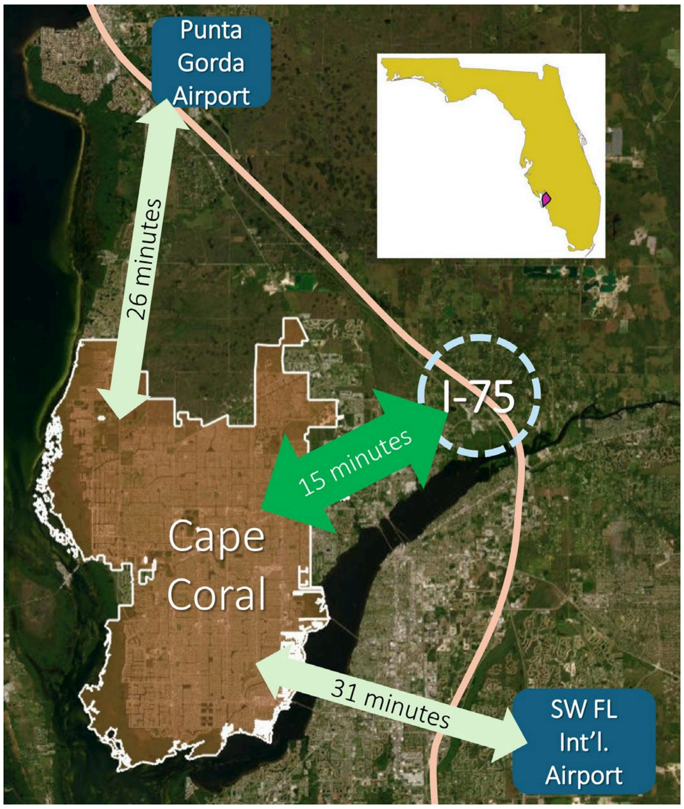
1. Business, Management, Marketing, and Related Support Services
2. Health Professions and Related Programs
3. Education
4. Multi/Interdisciplinary Studies
5. Psychology

Market Potential

Cape Coral's southwest Florida location can not only cover the total Florida market but a significant portion of the US. Within a 300-mile travel distance (one day truck routing), about **6.1%** of the nation can be reached.

Highway Travel

Interstate 75 (I-75) is within **15 minutes**' drive from Cape Coral. Access to the interstate can be achieved to the eastern direction in North Fort Myers or via one of the bridges through downtown Fort Myers. To the north, access is available in Punta Gorda at a slightly longer travel time.



Air Travel

There are two airports that serve Cape Coral. Southwest Florida International Airport (RSW) is a major facility providing domestic and international flights daily. Travel to RSW is within **31 minutes** from downtown Cape Coral. RSW serves **10.1 million** passengers annually. In 2023, RSW had **87,685** aircraft operations.

Punta Gorda Airport (PGD) in Charlotte County just north of Cape Coral is a regional facility providing domestic flights mainly to the Midwest (Allegiant Air). PGD serves about **1.9 million** passengers per year and had **103,252** aircraft operations in 2023.

Rail Service

Passenger rail service via Amtrak is available in Fort Myers. The system operates **77** daily scheduled trips. Travel from downtown to Fort Myers Station Cape Coral is about **31 minutes**.

Freight rail services are provided by the Seminole Gulf Railway (SGLR). SGLR is a short line freight and passenger excursion railroad headquartered in Fort Myers that operates two former CSX Transportation railroad lines in Southwest Florida.

Bus Service

LeeTran operates bus services in Cape Coral. Currently there are **5** fixed bus routes but expanded services are under development. Looped routes provide transit to and from Fort Myers. The new Ultra On Demand micro-mobility fleet will enhance bus transit capabilities throughout the City.

Lifestyle & Recreational

Cape Coral's riverfront location and unique canal system offer a recreation-oriented lifestyle that has broad-range appeal. Some of the area's tourism advantages are as follows:

- Growing residential population, which can further encourage already existing strong category of visiting friends & family travelers
- Major home rental market for vacationers – over **4,000** homes and **350** private rooms available
- Numerous opportunities to rent a house and boat together, canals enhance rental properties
- Major hotel - Westin Resort at Marina Village – significant anchor for tourism activity
- Favorable location
- Proximity to airports, major highways, and neighboring tourist communities.
- One of safest cities in Florida
- Sports tourism – an already existing, active, and effective government involvement
- Increasingly strong restaurant and food scene
- Water activities – boating, dolphin tours, fishing, kayaking
- Winter warm weather destination
- Major League Baseball Spring Training nearby
- Active events schedule including festivals, parades, and concerts

Contact Information

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Competitive Advantages for the IT & Media Cluster in the City of Cape Coral

City of Cape Coral
Office of Economic & Business Development

This cluster illustrates the regional growth of information technology and media services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

December 2024

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Photo credit: DepositPhotos

Key Findings

- As part of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the IT & Media Cluster.
- The IT & Media Cluster consists of **10** industry components:
  - Motion picture and video industries
  - Sound recording industries
  - Software publishers
  - Radio and television broadcasting stations
  - Media streaming distribution services, social networks, and other media networks and content providers
  - Satellite telecommunications
  - All other telecommunications
  - Computer systems design and related services
  - Advertising, public relations, and related services
  - Electronic and precision equipment repair and maintenance
- Revenue (in current dollars) for the IT & Media Cluster is **$1,886.8 billion**. Growth expectations in the next five years will raise this figure to **$2,540.6 billion**, which is a **5.50%** compound annual growth rate (CAGR), or an overall **34.7%** revenue gain.
- The **10** individual industries that comprise the cluster have projected revenue gains ranging from **96.8%** (Satellite telecommunications) to **9.5%** (Media streaming distribution services, social networks, and other media networks and content providers). In aggregate, the cluster demonstrates solid revenue growth for the next several years.
- Florida ranks in **4th** place for IT & Media Cluster employment among the **10** leading US states.
- The Cluster has a projected **770** new jobs in Cape Coral supportable by the labor market.

- There are **6** Florida cities identified as direct competitors to Cape Coral:
    - Fort Lauderdale
    - Orlando
    - Palm Bay
    - Pompano Beach
    - Port St. Lucie
    - West Palm Beach

- As an example of typical Cluster business, a Media Streaming, Social Networks & Other Content Providers facility of **11** persons in Cape Coral will generate **$2.744 million** in annual revenue.

- Profitability for a Media Streaming, Social Networks & Other Content Providers in Cape Coral is **13.6%** which leads all competition.

- Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" facilities that can capture some of this worker flow.

- With the projected office census of **770** new jobs, it can be expected that at least **41,000 sf** of office space and **170,000** of flex space will be required to meet the Cluster's employment needs.

Introduction

As part of the development of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the IT & Media Cluster.

As defined by Harvard University, "a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support.

This cluster illustrates the regional growth of information technology and media services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

The Cluster consists of **10** industry components:

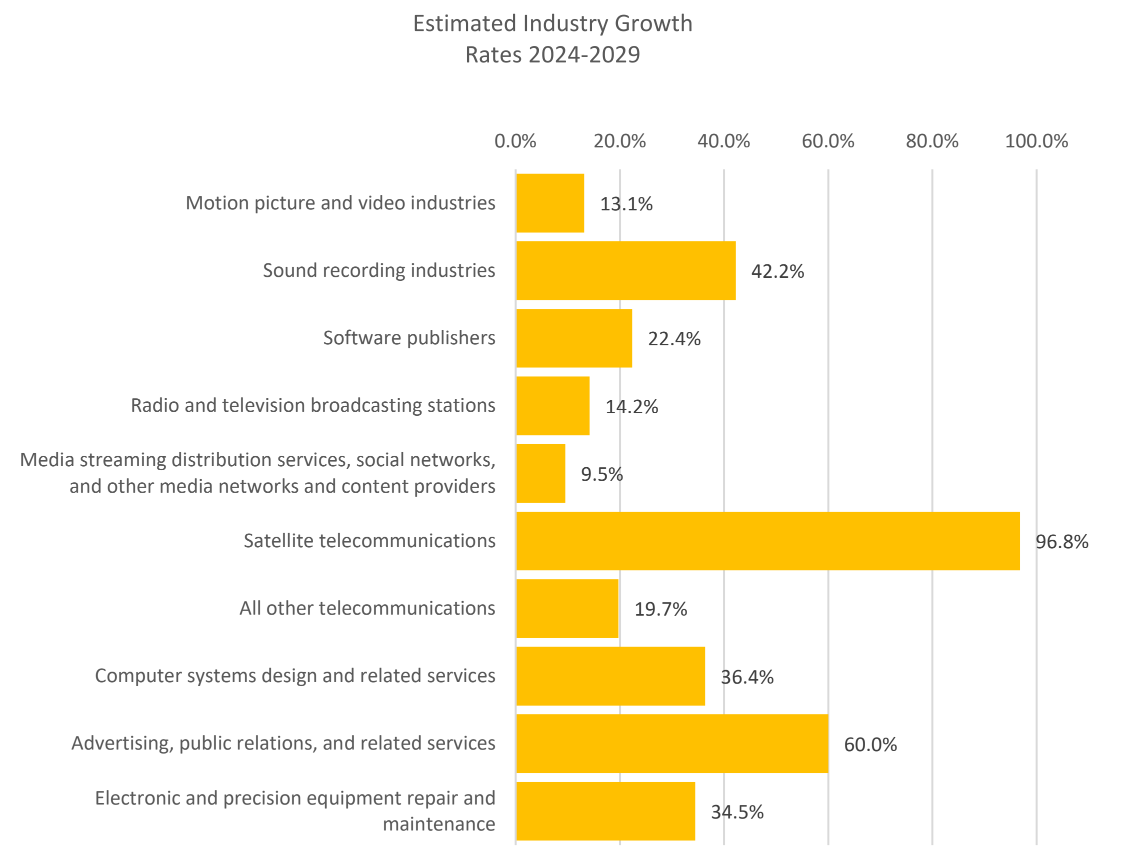
- Motion picture and video industries
- Sound recording industries
- Software publishers
- Radio and television broadcasting stations
- Media streaming distribution services, social media networks, & content providers
- Satellite telecommunications
- All other telecommunications
- Computer systems design and related services
- Advertising, public relations, and related services
- Electronic and precision equipment repair and maintenance

Industries Performances

Revenue (in current dollars) for the IT & Media Cluster is **$1,885.8 billion**. Growth expectations in the next five years will raise this figure to **$2,540.6 billion**, which is a **5.50%** compound annual growth rate (CAGR), or an overall **34.7%** revenue gain.

The **10** individual industries that comprise the cluster have projected revenue gains ranging from **96.8%** (Satellite telecommunications) to **9.5%** (Media streaming distribution services, social networks, and other media networks and content providers). In aggregate, the cluster demonstrates solid revenue growth for the next several years. Refer to Exhibit 1 (below).

Exhibit 1 – Industry Performance Projections 2024-2029



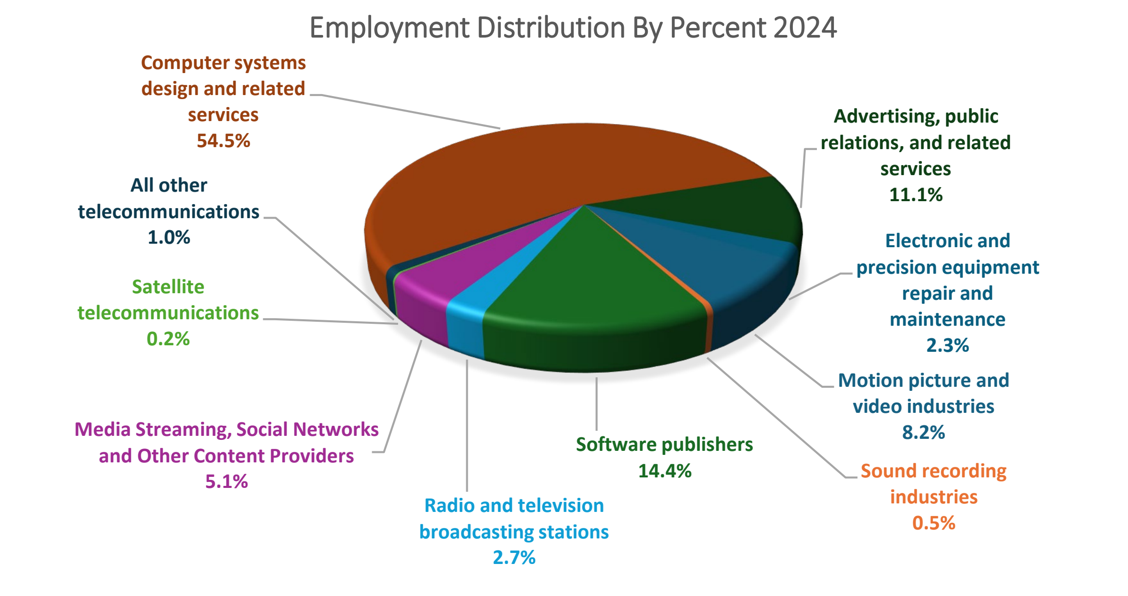
In the following Exhibit 2, each of the component industries are presented with their individual revenue growth expectations, employee productivity evaluation and typical establishment size.

Exhibit 2 – Component Industries Data Aggregation					
Motion picture and video industries			Sound recording industries		
	2024	2029		2024	2029
Revenue ($ billion)	$279.50	$316.23	Revenue ($ billion)	$55.44	$78.85
CAGR	2.50%		CAGR	7.30%	
Revenue Gain ($ billion)	$36.73		Revenue Gain ($ billion)	$23.41	
Revenue Gain (percent)	13.1%		Revenue Gain (percent)	42.2%	
Revenue per employee	$775,900		Revenue per employee	$2,719,200	
Typ. Estb. Size (US)	10		Typ. Estb. Size (US)	4	
Software publishers			Radio and television broadcasting stations		
	2024	2029		2024	2029
Revenue ($ billion)	$363.40	$444.69	Revenue ($ billion)	$34.6	$39.51
CAGR	4.12%		CAGR	2.69%	
Revenue Gain ($ billion)	$81.29		Revenue Gain ($ billion)	$4.91	
Revenue Gain (percent)	22.4%		Revenue Gain (percent)	14.2%	
Revenue per employee	$571,300		Revenue per employee	$290,500	
Typ. Estb. Size (US)	7		Typ. Estb. Size (US)	20	
Media streaming distribution services, social networks, and other media networks and content providers			Satellite telecommunications		
	2024	2029		2024	2029
Revenue ($ billion)	$53.3	$58.39	Revenue ($ billion)	$16.9	$33.26
CAGR	1.84%		CAGR	14.50%	
Revenue Gain ($ billion)	$5.09		Revenue Gain ($ billion)	$16.36	
Revenue Gain (percent)	9.5%		Revenue Gain (percent)	96.8%	
Revenue per employee	$238,700		Revenue per employee	$1,982,900	
Typ. Estb. Size (US)	15		Typ. Estb. Size (US)	8	
All other telecommunications			Computer systems design and related services		
	2024	2029		2024	2029
Revenue ($ billion)	$32.5	$38.92	Revenue ($ billion)	$469.4	$640.11
CAGR	3.67%		CAGR	6.40%	
Revenue Gain ($ billion)	$6.42		Revenue Gain ($ billion)	$170.71	
Revenue Gain (percent)	19.7%		Revenue Gain (percent)	36.4%	
Revenue per employee	$730,900		Revenue per employee	$195,300	
Typ. Estb. Size (US)	9		Typ. Estb. Size (US)	6	

Advertising, public relations, and related services			Electronic and precision equipment repair and maintenance		
	2024	2029		2024	2029
Revenue ($ billion)	$429.5	$687.32	Revenue ($ billion)	$161.2	$221.92
CAGR	9.86%		CAGR	6.10%	
Revenue Gain ($ billion)	$257.82		Revenue Gain ($ billion)	$52.11	
Revenue Gain (percent)	60.0%		Revenue Gain (percent)	34.5%	
Revenue per employee	$878,600		Revenue per employee	$1,463,900	
Typ. Estb. Size (US)	6		Typ. Estb. Size (US)	6	

The distribution of employment in the IT & Media Cluster is illustrated in Exhibit 3 (below):

Exhibit 3 – US Employment Distribution in the IT & Media Cluster



For a Florida location, the **4th** place ranking for the IT & Media Cluster employment among the **10** leading states is a favorable condition as shown in Exhibit 4 (below):

Exhibit 4 – Ten Leading States for the IT & Media Cluster Employment		
State	2024 Employment	Rank
California	741,623	1
Texas	403,915	2
New York	342,152	3
Florida	240,804	4
Virginia	210,048	5
Washington	184,908	6
Georgia	164,138	7
Illinois	158,980	8
Massachusetts	143,572	9
North Carolina	135,117	10

The Fit for Cape Coral

As part of an Economic Development Strategic Plan for Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the IT & Media Cluster. The Cluster contains the **10** component business areas that have a projected **770** new jobs supportable by the Cape Coral labor market, as shown in Exhibit 5 (below):

Exhibit 5 - IT & Media Cluster Employment	
Industry	# of New Jobs
Motion picture and video industries	68
Sound recording industries	7
Software publishers	137
Radio and television broadcasting stations	37
Media Streaming, Social Networks and Other Content Providers	45
Satellite telecommunications	3
All other telecommunications	11
Computer systems design and related services	397
Advertising, public relations, and related services	22
Electronic and precision equipment repair and maintenance	43
Total	**770**

For exploratory purposes, the Media Streaming, Social Networks and Other Content Providers industry has been selected for deeper examination. For this industry category, there is a projected the growth of **45** new jobs.

Media Streaming, Social Networks & Other Content Providers

This industry comprises establishments primarily providing media streaming distribution services, operating social network sites, operating media broadcasting and cable television networks, and supplying information, such as news reports, articles, pictures, and features, to the news media. These establishments distribute textual, audio, and/or video content of general or specific interest.

Model Operations

The national average size for a Media Streaming, Social Networks & Other Content Providers facility is **15** persons, and the State of Florida's is **8** persons. A nominal facility size of **11** persons is selected as a Cape Coral model for this industry. Average productivity output for Media Streaming, Social Networks & Other Content Providers is **$238,700** per employee, resulting in an annual sales figure of **$2.744 million**. Total investment per employee is estimated at **$62,200**, as shown in Exhibit 6 (below):

Exhibit 6 – Media Streaming, Social Netwks. & Other Content Provdrs. -- Typical Operations	
Annual Net sales	$2,744,000
Total Employment	11
Avg. hourly Wage	$29.82
Fringe benefits Percentage	35%
Total Payroll	$921,200
Facility Footprint sq. ft.	3,300
Employee Occupancy/sf	300
Floor-Area-Ratio	0.34
Facility Construction Cost/sq. ft.	$119
Facility Construction Cost	$394,000
Estimated Equipment Cost (annual carry)	$100,000
Site Acreage	0.34
Land Cost	$221,300
Total Investment	**$715,300**

Staffing

Employment distribution among the relevant major occupational groups for the industry is shown in Exhibit 7 (below):

Exhibit 7 – Media Streaming, Social Netwks. & Other Content Provdrs. Facility – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Advertising Sales Agents	1	$31.88	$36.86
Audio and Video Technicians	3	$25.95	$19.84
Business Operations Specialists, All Other	1	$41.40	$36.78
Computer User Support Specialists	1	$28.02	$28.50
Financial Specialists, All Other	1	$35.14	$27.64
General and Operations Managers	1	$62.84	$56.48
Graphic Designers	2	$28.32	$27.48
Producers and Directors	1	$40.36	$27.33
Total	**11**	$31.88	$36.86
Average Hourly Wage		**$34.01**	**$29.82**

Labor Capability

Available labor is calculated by using both the current unemployment rate (U3) for the Cape Coral-Fort Myers MSA and the factored under-employment rate[1] (U6) from the Bureau of Labor Statistics. For the target of **45** new jobs for the industry sector, the Employee Census table from above is revisited with the overall new job requirements shown in Exhibit 8 (below).

Exhibit 8 - Media Streaming, Social Netwks. & Other Content Provdrs. Facility – Occupations Needed	
Occupation	# of new jobs
Advertising Sales Agents	4
Audio and Video Technicians	13
Business Operations Specialists, All Other	4
Computer User Support Specialists	4
Financial Specialists, All Other	4
General and Operations Managers	4
Graphic Designers	8
Producers and Directors	4
Total Occupations Required	**45**

[1] U6: Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

In the following, the **8** categories of staffing for a Media Streaming, Social Networks & Other Content Providers Facility are evaluated for direct hiring capabilities:

Advertising Sales Agents

In the Cape Coral-Fort Myers MSA, there are currently **240** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **17** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Audio and Video Technicians

In the MSA, there are currently **160** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **11** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

Business Operations Specialists, All Other

In the MSA, there are currently **1,310** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **91** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Computer User Support Specialists

In the MSA, there are currently **980** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **68** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Financial Specialists, All Other

In the MSA, there are currently **90** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **6** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

General and Operations Managers

In the MSA, there are currently **6,110** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **425** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Graphic Designers

In the MSA, there are currently **300** persons employed in this position. Using the U6 factor,

it is estimated that there are approximately **21** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Producers and Directors

In the MSA, there are currently **190** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **13** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, staffing for a Media Streaming, Social Networks and Other Content Providers Facility in Cape Coral is projected to be quite achievable. However, the position that exhibits a shortfall is:

- Audio and Video Technicians

The economic development and workforce officials in Cape Coral have been alerted to the employment shortfall issue. New initiatives are in development that will increase labor availability in this area.

Comparison Analyses

The objective of this section is the determination of which Florida cities are Cape Coral's true competition, not just Fort Myers or another Southwest Florida community. To accomplish this evaluation, a review of **22** municipalities in Florida with a population of **100,000** or more was conducted. Through analysis of population growth for each of the as compared to annual rate for the State of Florida, **6** cities emerged as true competitors to Cape Coral:

- Fort Lauderdale
- Orlando
- Palm Bay
- Pompano Beach
- Port St. Lucie
- West Palm Beach

Profitability Determination

Base financial information is shown in Exhibit 9 (below):

Exhibit 9 - Media Streaming, Social Netwks. & Other Content Provdrs. – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$100,600**	**$119**	**$494,000**	**$594,600**	**$475,700**	**$37,400**
Fort Lauderdale	$1,437,000	$489,900	$125	$512,000	$1,001,900	$801,500	$63,000
Orlando	$201,000	$68,500	$123	$506,000	$574,500	$459,600	$36,100
Palm Bay	$494,000	$168,400	$130	$529,000	$697,400	$557,900	$43,800
Pompano Beach	$2,057,000	$701,300	$125	$512,000	$1,213,300	$970,600	$76,300
Port St. Lucie	$146,000	$49,800	$121	$501,000	$550,800	$440,600	$34,700
West Palm Beach	$975,000	$332,400	$125	$512,000	$844,400	$675,500	$53,100

Profitability for a Media Streaming, Social Networks and Other Content Providers Facility in Cape Coral is **13.6%** which leads all competition, as shown in Exhibit 10 (below):

Exhibit 10 - Media Streaming, Social Netwks. & Other Content Provdrs. – Competitive Evaluation – Annual Operating Profits							
Market	**Cape Coral**	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	**100.0%**	100.0%	100.0%	100.0 %	100.0%	100.0%	100.0%
Payroll	**33.6%**	39.5%	39.4%	38.7%	39.5%	35.3%	39.5%
Utilities & Fuels	**9.0%**	9.0%	10.3%	9.0%	9.0%	9.0%	9.0%
Debt Service	**1.4%**	2.3%	1.3%	1.6%	2.8%	1.3%	1.9%
Cost of goods sold	**43.9%**	50.8%	51.1%	49.3%	51.3%	45.6%	50.5%
Annual Gross profit	**56.1%**	49.2%	48.9%	50.7%	48.7%	54.4%	49.5%
Less: Sales exp.	**14.5%**	14.5%	14.5%	14.5%	14.5%	14.5%	14.5%
General & Administrative. Overhead	**28.0%**	28.0%	28.0%	28.0%	28.0%	28.0%	28.0%
Total Operating expenses	**42.5%**	42.5%	42.5%	42.5%	42.5%	42.5%	42.5%
Annual Net Profit before taxes	**13.6%**	6.7%	6.4%	8.2%	6.2%	11.9%	7.0%

Summary

The IT & Media Cluster illustrates the regional growth of information technology and electronic media services that will stimulate new development and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

Metrics for the Cluster and its component industries all indicate positive revenue growth for the next five years. The Cluster is essentially a mix of office and flex space users. The IT & Media industry is flourishing in Florida, partially due to the following advantages:

Business-friendly policies

Florida offers a favorable tax and business climate, including no state income tax.

Strong workforce

Florida's diverse economy and strong workforce support the labor force.

Proximity to markets

Florida's location near buyers, suppliers, labor, and transportation allows companies to cut costs and develop close relationships with the community.

For Cape Coral, operations such as a Media Streaming, Social Networks and Other Content Providers will be profitable endeavors. The City and the MSA have a dynamic labor supply that is well suited to meet the needs of the IT & Media Cluster.

Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" industrial facilities that can capture some of this worker flow.

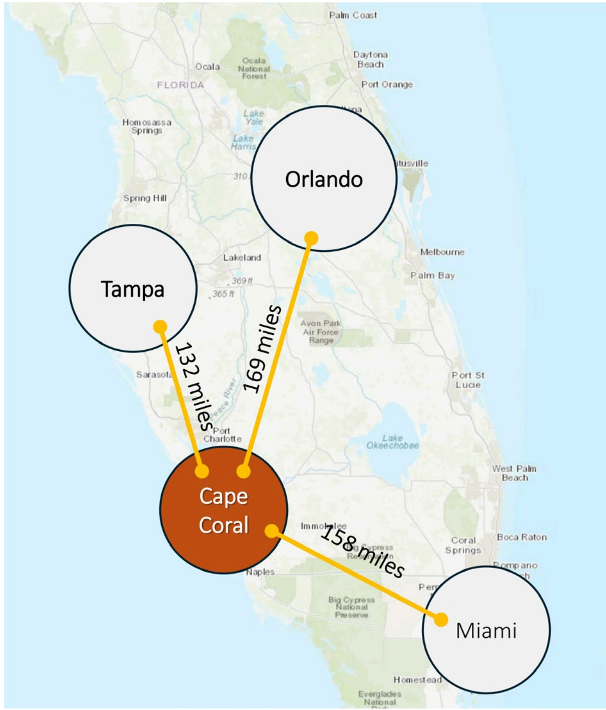
With the projected office census of **770** new jobs, it can be expected that at least **41,000 sf** of office space and **170,000** of flex space will be required to meet the Cluster's employment needs.

Photo credit: Depositphotos

Competitive Advantages of the City of Cape Coral Location

Cape Coral is in Lee County in Southwest Florida and is the largest population component of the Cape Coral-Fort Myers Metropolitan Statistical Area. The City's location is about an equidistance from the major urban centers of Tampa, Miami, and Orlando.

Originally developed in the late 1950's as a "Waterfront Wonderland", Cape Coral was designed to bring the waterfront dream of home ownership to middle-income Americans. With its over 400 miles of salt and freshwater canals, Cape Coral is a unique community that is redefining its identity beyond being just a suburb of Fort Myers. The City was incorporated in 1970 and maintains a brisk growth pattern despite economic downturns, a pandemic, and severe weather disturbances.



Demographic Advantages

With a current population of approximately **217,000** people, Cape Coral is forecasted to grow to over **375,000** by 2050, representing a nearly **73%** increase. Cape Coral's explosive growth places it among the five fastest growing communities in the nation, measuring more than twice that of the State of Florida.

While more retirees are expected, the City is experiencing a dynamic growth in the working age groups of **25-44 yrs**. By 2029, an overall population gain of about **20,000** new residents will result in **34%** increase in working aged people.

Demographic and market advantages include:

- Growth rate exceeding the State's
- Dynamic growth rate among 25-44 yr. old residents
- Above average number of executive-age workers

- Exemplary rate of English language proficiency
- Above average household size
- Above average median household income
- Above average home ownership rate
- Below average cost of living rate
- Above average good/services industries employment
- Below average services industries hourly wages
- Above average worker mobility patterns
- Below average commercial and industrial electric rates

Higher Education Resources

There are **9** four-year colleges and universities within **50** miles of Cape Coral. In 2022, **9,933** degrees were conferred by the following institutions:

- Florida Gulf Coast University (Fort Myers)
- Florida SouthWestern State College (Fort Myers)
- Southern Technical College (Fort Myers)
- Hodges University (Fort Myers)
- Keiser University-Ft Myers (Fort Myers)
- Rasmussen University-Fort Myers (Fort Myers)
- Ave Maria School of Law (Naples)
- Ave Maria University (Ave Maria)

The five most sought after fields of study are:

1. Business, Management, Marketing, and Related Support Services
2. Health Professions and Related Programs
3. Education
4. Multi/Interdisciplinary Studies
5. Psychology

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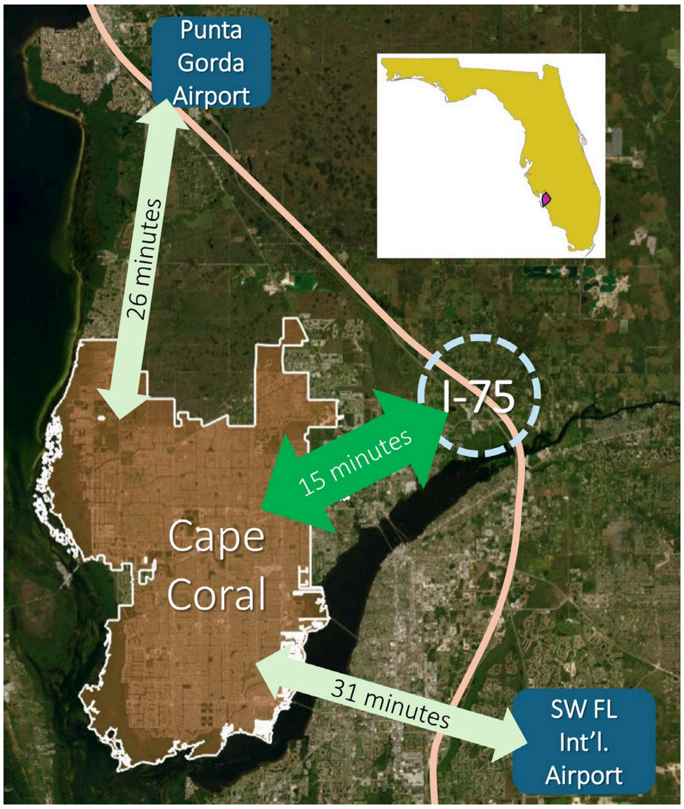
Market Potential

Cape Coral's southwest Florida location can not only cover the total Florida market but a significant portion of the US. Within a 300-mile travel distance (one day truck routing), about **6.1%** of the nation can be reached.

Highway Travel



Interstate 75 (I-75) is within **15 minutes**' drive from Cape Coral. Access to the interstate can be achieved to the eastern direction in North Fort Myers or via one of the bridges through downtown Fort Myers. To the north, access is available in Punta Gorda at a slightly longer travel time.

Air Travel

There are two airports that serve Cape Coral. Southwest Florida International Airport (RSW) is a major facility providing domestic and international flights daily. Travel to RSW is within **31 minutes** from downtown Cape Coral. RSW serves **10.1 million** passengers annually. In 2023, RSW had **87,685** aircraft operations.

Punta Gorda Airport (PGD) in Charlotte County just north of Cape Coral is a regional facility providing domestic flights mainly to the Midwest (Allegiant Air). PGD serves about **1.9 million** passengers per year and had **103,252** aircraft operations in 2023.

Rail Service

Passenger rail service via Amtrak is available in Fort Myers. The system operates **77** daily scheduled trips. Travel from downtown to Fort Myers Station Cape Coral is about **31 minutes**.

Freight rail services are provided by the Seminole Gulf Railway (SGLR). SGLR is a short line freight and passenger excursion railroad headquartered in Fort Myers that operates two former CSX Transportation railroad lines in Southwest Florida.

Bus Service

LeeTran operates bus services in Cape Coral. Currently there are **5** fixed bus routes but expanded services are under development. Looped routes provide transit to and from Fort Myers. The new Ultra On Demand micro-mobility fleet will enhance bus transit capabilities throughout the City.

Lifestyle & Recreational

Cape Coral's riverfront location and unique canal system offer a recreation-oriented lifestyle that has broad-range appeal. Some of the area's tourism advantages are as follows:

- Growing residential population, which can further encourage already existing strong category of visiting friends & family travelers
- Major home rental market for vacationers – over **4,000** homes and **350** private rooms available
- Numerous opportunities to rent a house and boat together, canals enhance rental properties
- Major hotel - Westin Resort at Marina Village – significant anchor for tourism activity
- Favorable location
- Proximity to airports, major highways, and neighboring tourist communities.
- One of safest cities in Florida
- Sports tourism – an already existing, active, and effective government involvement
- Increasingly strong restaurant and food scene
- Water activities – boating, dolphin tours, fishing, kayaking
- Winter warm weather destination
- Major League Baseball Spring Training nearby
- Active events schedule including festivals, parades, and concerts

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Contact Information

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INDUSTRY PROSPECTUS

Competitive Advantages for the Sustainable Real Estate Cluster in the City of Cape Coral

City of Cape Coral
Office of Economic & Business Development

This cluster illustrates the regional growth of sustainable real estate that will stimulate new resilient construction practices and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

December 2024

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Key Findings

- As part of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Sustainable Real Estate Cluster.

- The Sustainable Real Estate Cluster consists of **4** industry sub-components:
    - Activities related to real estate
    - Architectural, engineering, and related services
    - Lessors of real estate
    - Lumber and other const. materials merchant wholesalers

- Revenue (in current dollars) for the Sustainable Real Estate Cluster is **$1,200.6 billion**. Growth expectations in the next five years will raise this figure to **$1,460.8 billion**, which is a **4.00%** compound annual growth rate (CAGR), or an overall **21.7%** revenue gain.

- The **4** individual industries that comprise the cluster have projected revenue gains ranging from **24.3%** (Lessors of real estate) to **14.2%** (Lumber and other const. materials merchant wholesalers). In aggregate, the cluster demonstrates solid revenue growth for the next several years.

- Florida ranks in **3rd** place for Sustainable Real Estate Cluster employment among the **10** leading US states.

- The Cluster has a projected **1,117** new jobs in Cape Coral supportable by the labor market.

- There are **6** Florida cities identified as direct competitors to Cape Coral:
    - Fort Lauderdale
    - Orlando
    - Palm Bay
    - Pompano Beach
    - Port St. Lucie
    - West Palm Beach

- As an example of typical Cluster business, a Real Estate Property Managers operation of **7** persons in Cape Coral will generate **$3.866 million** in annual revenue.

- Profitability for Real Estate Property Managers in Cape Coral is **18.2%**, leading all competition.

- Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" office and warehouse facilities that can capture some of this worker flow.

- With the projected employment growth of **1,117** new jobs (910 office, 207 wholesale), it can be expected that at least **182,000 sf** of new office space and **310,000 sf** of new warehouse space will be required to meet the Cluster's employment needs.

Introduction

As part of the development of an Economic Development Strategic Plan for the City of Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Sustainable Real Estate Cluster.

As defined by Harvard University, “a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support.

This cluster illustrates the regional growth of sustainable real estate that will stimulate new resilient construction practices and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

The Cluster consists of **4** industry components:

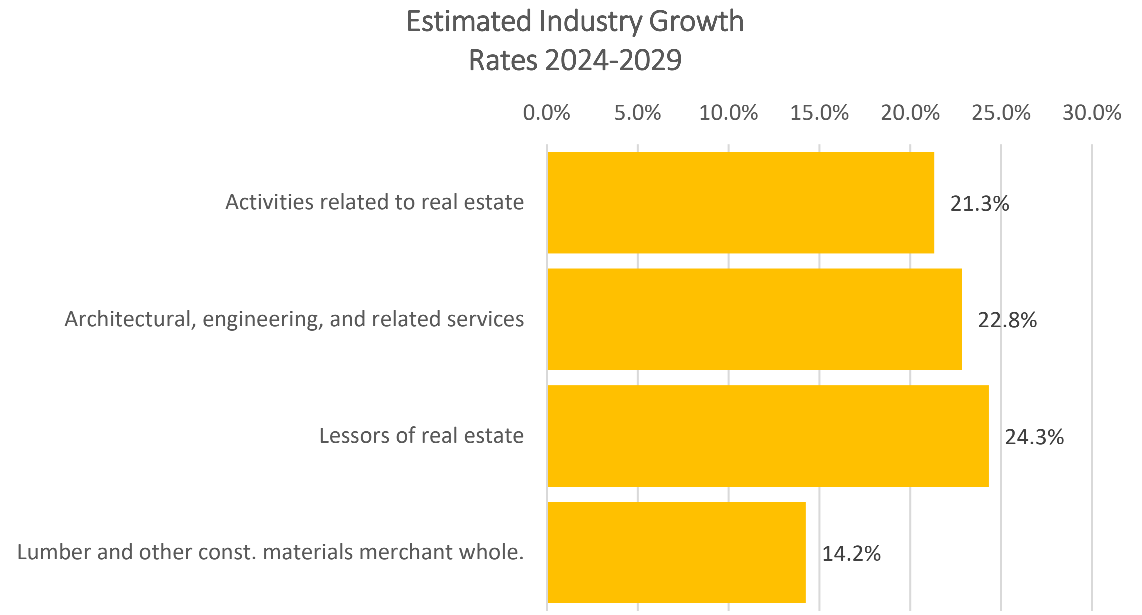
- Activities related to real estate
- Architectural, engineering, and related services
- Lessors of real estate
- Lumber and other const. materials merchant wholesalers

Industries Performances

Revenue (in current dollars) for the Sustainable Real Estate Cluster is **$928.3 billion**. Growth expectations in the next five years will raise this figure to **$1,130.5 billion**, which is a **4.02%** compound annual growth rate (CAGR), or an overall **21.8%** revenue gain.

The **4** individual industries that comprise cluster have projected revenue gains ranging from **24.3%** (Lessor of Real Estate) to **14.2%** (Lumber and other construction materials merchant wholesalers). In aggregate, the cluster demonstrates solid revenue growth for the next several years. Refer to Exhibit 1 (below).

Exhibit 1 – Industry Performance Projections 2024-2029



In the following Exhibit 2, each of the component industries are presented with their individual revenue growth expectations, employee productivity evaluation and typical establishment size.

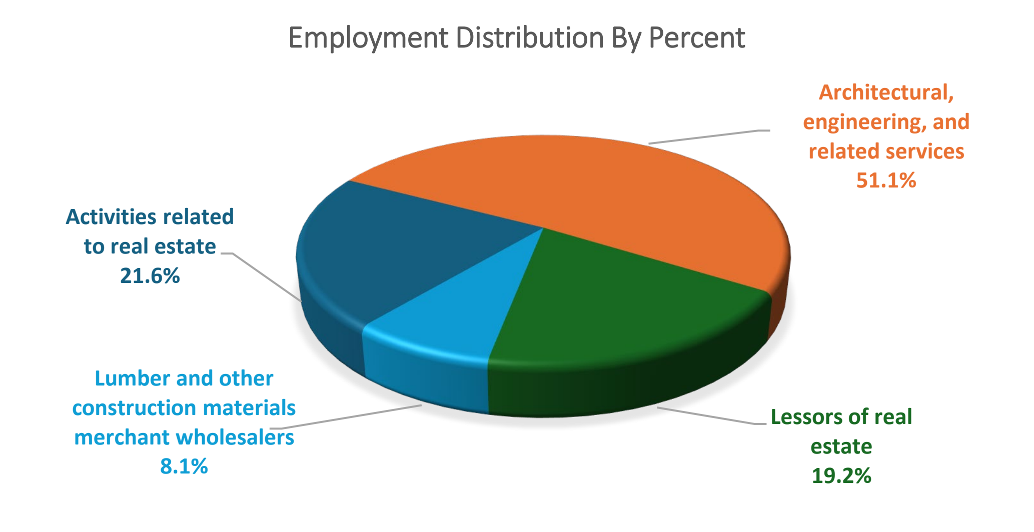
Exhibit 2 – Component Industries Data Aggregation

Activities related to real estate			Architectural, engineering, and related services		
	2024	2029		2024	2029
Revenue ($ billion)	$389.60	$472.64	Revenue ($ billion)	$359.90	$442.10
CAGR	3.94%		CAGR	4.20%	
Revenue Gain ($ billion)	$83.04		Revenue Gain ($ billion)	$82.20	
Revenue Gain (percent)	21.3%		Revenue Gain (percent)	22.8%	
Revenue per employee	$555,000		Revenue per employee	$217,100	
Typ. Estb. Size (US)	7		Typ. Estb. Size (US)	10	

Lessors of real estate			Lumber and other const. materials merchant whole.		
	2024	2029		2024	2029
Revenue ($ billion)	$305.65	$379.99	Revenue ($ billion)	$145.40	$166.12
CAGR	4.45%		CAGR	2.70%	
Revenue Gain ($ billion)	$74.34		Revenue Gain ($ billion)	$20.72	
Revenue Gain (percent)	24.3%		Revenue Gain (percent)	14.2%	
Revenue per employee	$491,400		Revenue per employee	$555,000	
Typ. Estb. Size (US)	5		Typ. Estb. Size (US)	10	

The distribution of employment in the 4 industry of the Sustainable Real Estate Cluster is illustrated in Exhibit 3 (below):

Exhibit 3 – US Employment Distribution in the Sustainable Real Estate Cluster



For a Florida location, the **3rd** place ranking for Sustainable Real Estate Cluster employment among the **10** leading states is a favorable condition as shown in Exhibit 4 (below):

Exhibit 4 – Ten Leading States for Sustainable Real Estate Cluster Employment		
State	2024 Employment	Rank
California	392,095	1
Texas	368,251	2
Florida	262,072	3
New York	240,192	4
Michigan	128,384	5
Pennsylvania	112,282	6
Georgia	105,951	7
Virginia	105,702	8
Illinois	99,770	9
North Carolina	99,077	10

The Fit for Cape Coral

As part of an Economic Development Strategic Plan for Cape Coral, a Target Industries analysis was conducted. An outcome of this work was the identification of the Sustainable Real Estate Cluster. As described earlier, the Cluster contains **4** component business areas. In total, they have a projected **1,117** new jobs supportable by the Cape Coral labor market, as shown in Exhibit 5 (below):

Exhibit 5 - Sustainable Real Estate Cluster Employment	
Industry	# of New Jobs
Activities related to real estate	175
Architectural, engineering, and related services	618
Lessors of real estate	117
Lumber and other construction materials merchant wholesalers	207
Total	**1,117**

For exploratory purposes, the **Activities Related to Real Estate** industry has been selected for deeper examination. For this industry category, there is a projected growth of **175** new jobs. Within this heading are **5** sub-categories of industries, one of which will be explored in greater detail.

- Real Estate Property Managers
- Offices of Real Estate Appraisers
- Real estate escrow agencies
- Real estate listing services

Real Estate Property Managers

This industry comprises establishments primarily engaged in managing real property for others. Management includes ensuring that various activities associated with the overall operation of the property are performed, such as collecting rents and overseeing other services (e.g., maintenance, security, trash removal).

Model Operations

The national average size for a Real Estate Property Managers facility is **7** persons, and the State of Florida's is **5** persons. However, a nominal facility size of **7** persons is selected as a Cape Coral model for this industry. Average productivity output for Real Estate Property Managers is **$555,000** per employee, resulting in an annual sales figure of **$3.866 million**. Total investment per employee is estimated at **$47,200.** Exhibit 6 (below) shows the operations details:

Exhibit 6 – Real Estate Property Managers Facility Operations	
Annual Net sales	$3,865,700
Total Employment	7
Avg. hourly Wage	$37.54
Fringe benefits Percentage	35%
Total Payroll	$734,000
Facility Footprint sq. ft.	1,400
Employee Occupancy/sf	200
Floor-Area-Ratio	0.30
Facility Construction Cost/sq. ft.	$119
Facility Construction Cost	$167,000
Estimated Equipment Cost	$14,000
Site Acreage	0.5
Land Cost	$148,000
Total Investment	**$329,000**

Staffing

Employment distribution among the relevant major occupational groups for the industry are shown in Exhibit 7 (below):

Exhibit 7- Real Estate Property Managers – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Property, Real Estate, and Community Association Managers	2	$37.35	$37.67
General and Operations Managers	1	$62.84	$68.37
Business Operations Specialists	2	$41.40	$36.78
Computer User Support Specialists	1	$28.02	$28.50
Receptionists and Information Clerks	1	$16.74	$16.98
Total	**7**		
Average Hourly Wage		**$37.87**	**$37.54**

Labor Capability

Available labor is calculated by using both the current unemployment rate (U3) for the Cape Coral-Fort Myers MSA and the factored under-employment rate[1] (U6) from the Bureau of Labor Statistics. For the target of **175** new jobs for the industry sector, the Employee Census table from above is revisited with the overall new job requirements shown in Exhibit 8 (below).

Exhibit 8 - Real Estate Property Managers – Occupations Needed	
Occupation	# of new jobs
Property, Real Estate, and Community Association Managers	50
General and Operations Managers	25
Business Operations Specialists	25
Computer User Support Specialists	50
Receptionists and Information Clerks	25
Total Occupations Required	**175**

In the following, the **5** categories of staffing for Real Estate Property Managers are evaluated for direct hiring capabilities:

[1] U6: Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

Property, Real Estate, and Community Association Managers

In the Cape Coral-Fort Myers MSA, there are currently **780** persons employed in this position. Using the U6 factor, it is estimated that there are approximately **54** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

General and Operations Managers

In the MSA, there are currently **6,110** persons employed in this position. It is estimated that there are approximately **425** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Business Operations Specialists

In the MSA, there are currently **1,310** persons employed in this position. It is estimated that there are approximately **91** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Computer User Support Specialists

In the MSA, there are currently **980** persons employed in this position. It is estimated that there are approximately **68** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Receptionists and Information Clerks

In the MSA, there are currently **2,290** persons employed in this position. It is estimated that there are approximately **159** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, there are no positions that exhibit shortfall for Real Estate Property Managers. For a potential Cape Coral location, it can be expected that the industry will not experience any significant labor shortages.

Comparison Analyses

The objective of this section is the determination of which Florida cities are Cape Coral's true competition, not just Fort Myers or another Southwest Florida community. To accomplish this evaluation, a review of **22** municipalities in Florida with a population of **100,000** or more was conducted. Through analysis of population growth for each of the as compared to annual rate for the State of Florida, **6** cities emerged as true competitors to Cape Coral:

- Fort Lauderdale
- Orlando
- Palm Bay
- Pompano Beach
- Port St. Lucie
- West Palm Beach

Profitability Determination

Base financial information is shown in Exhibit 9 (below):

Exhibit 9 - Real Estate Property Managers – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$140,000**	**$119**	**$181,000**	**$321,000**	**$256,800**	**$27,800**
Fort Lauderdale	$1,437,000	$683,000	$125	$189,000	$872,000	$697,600	$75,400
Orlando	$201,000	$96,000	$123	$186,000	$282,000	$225,600	$24,400
Palm Bay	$494,000	$235,000	$130	$196,000	$431,000	$344,800	$37,300
Pompano Beach	$2,057,000	$978,000	$125	$189,000	$1,167,000	$933,600	$100,900
Port St. Lucie	$146,000	$69,000	$121	$184,000	$253,000	$202,400	$21,900
West Palm Beach	$975,000	$464,000	$125	$189,000	$653,000	$522,400	$56,500

Profitability for Real Estate Property Managers in Cape Coral is **18.2%**, leading all competition, as shown in Exhibit 10 (below):

Exhibit 10 – Real Estate Property Managers – Competitive Evaluation – Annual Operating Profits							
Market	**Cape Coral**	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	**100.0%**	100.0%	100.0%	100.0 %	100.0%	100.0%	100.0%
Payroll	**19.1%**	20.6%	18.9%	19.0%	20.6%	17.3%	20.6%
Utilities & Fuels	**8.0%**	10.0%	8.7%	10.0%	10.1%	10.0%	10.0%
Debt Service	**0.7%**	2.0%	0.6%	1.0%	2.6%	0.6%	1.5%
Cost of goods sold	**27.8%**	32.6%	28.2%	30.0%	33.3%	27.9%	32.1%
Annual Gross profit	**72.2%**	67.4%	71.8%	70.0%	66.7%	72.1%	67.9%
Less: Sales exp.	**22.0%**	22.0%	22.0%	22.0%	22.0%	22.0%	22.0%
General & Administrative. Overhead	**32.0%**	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%
Total Operating expenses	**54.0%**	54.0%	54.0%	54.0%	54.0%	54.0%	54.0%
Annual Net Profit before taxes	**18.2%**	13.4%	17.8%	16.0%	12.7%	18.1%	13.9%

Summary

This Cluster illustrates the regional growth of sustainable real estate that will stimulate new resilient construction practices and provide location opportunities for businesses seeking lower cost operating environments with good market access to multiple urban centers.

Metrics for the Cluster and its component industries all indicate positive revenue growth for the next five years. The Cluster represents a mix of office and warehouse space users, quite suitable for a Cape Coral location. Some advantages include:

Business-friendly policies

Florida offers a favorable tax and business climate, including no state income tax.

Strong workforce

Florida's diverse economy and strong workforce support the labor force.

Proximity to markets

Florida's location near buyers, suppliers, labor, and transportation allows companies to cut costs and develop close relationships with the community.

For Cape Coral, operations such as Real Estate Property Managers will be profitable endeavors. The City and the MSA have a dynamic labor supply that is well suited to meet the needs of the Sustainable Real Estate Cluster.

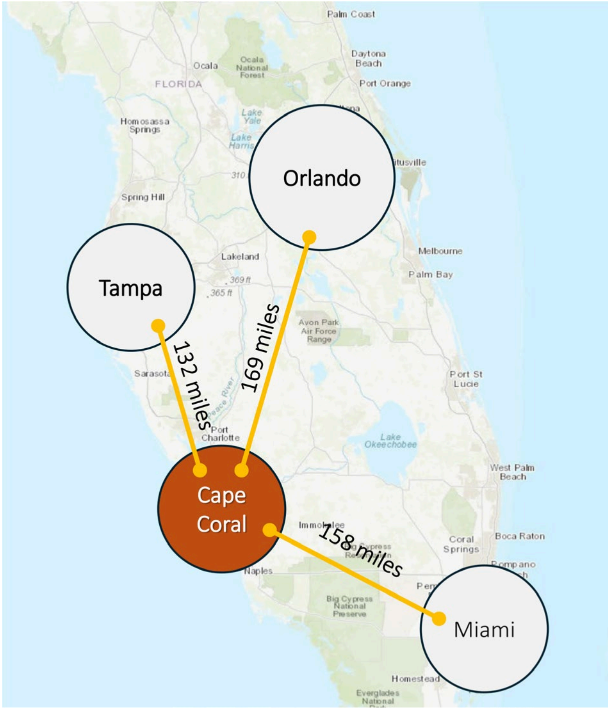
Cape Coral's employed civilian labor force of **102,700** is estimated to have an estimated **56%** of workers commuting to locations outside of the City. This out-commuting labor force presents an opportunity for development of new "intercept" office and warehouse facilities that can capture some of this worker flow.

With the projected employment growth of **1,117** new jobs (910 office, 207 wholesale), it can be expected that at least **182,000 sf** of new office space and **310,000 sf** of new warehouse space will be required to meet the Cluster's employment needs.

Photo credit: Depositphotos

Competitive Advantages of the City of Cape Coral Location

Cape Coral is in Lee County in Southwest Florida and is the largest population component of the Cape Coral-Fort Myers Metropolitan Statistical Area. The City's location is about an equidistance from the major urban centers of Tampa, Miami, and Orlando.



Originally developed in the late 1950's as a "Waterfront Wonderland", Cape Coral was designed to bring the waterfront dream of home ownership to middle-income Americans. With its over 400 miles of salt and freshwater canals, Cape Coral is a unique community that is redefining its identity beyond being just a suburb of Fort Myers. The City was incorporated in 1970 and maintains a brisk growth pattern despite economic downturns, a pandemic, and severe weather disturbances.

Demographic Advantages

With a current population of approximately **217,000** people, Cape Coral is forecasted to grow to over **375,000** by 2050, representing a nearly **73%** increase. Cape Coral's explosive growth places it among the five fastest growing communities in the nation, measuring more than twice that of the State of Florida.

While more retirees are expected, the City is experiencing a dynamic growth in the working age groups of **25-44 yrs**. By 2029, an overall population gain of about **20,000** new residents will result in **34%** increase in working aged people.

Demographic and market advantages include:

- Growth rate exceeding the State's
- Dynamic growth rate among 25-44 yr. old residents
- Above average number of executive-age workers

- Exemplary rate of English language proficiency
- Above average household size
- Above average median household income
- Above average home ownership rate
- Below average cost of living rate
- Above average good/services industries employment
- Below average services industries hourly wages
- Above average worker mobility patterns
- Below average commercial and industrial electric rates

Higher Education Resources

There are **9** four-year colleges and universities within **50** miles of Cape Coral. In 2022, **9,933** degrees were conferred by the following institutions:

- Florida Gulf Coast University (Fort Myers)
- Florida SouthWestern State College (Fort Myers)
- Southern Technical College (Fort Myers)
- Hodges University (Fort Myers)
- Keiser University-Ft Myers (Fort Myers)
- Rasmussen University-Fort Myers (Fort Myers)
- Ave Maria School of Law (Naples)
- Ave Maria University (Ave Maria)

The five most sought after fields of study are:

1. Business, Management, Marketing, and Related Support Services
2. Health Professions and Related Programs
3. Education
4. Multi/Interdisciplinary Studies
5. Psychology

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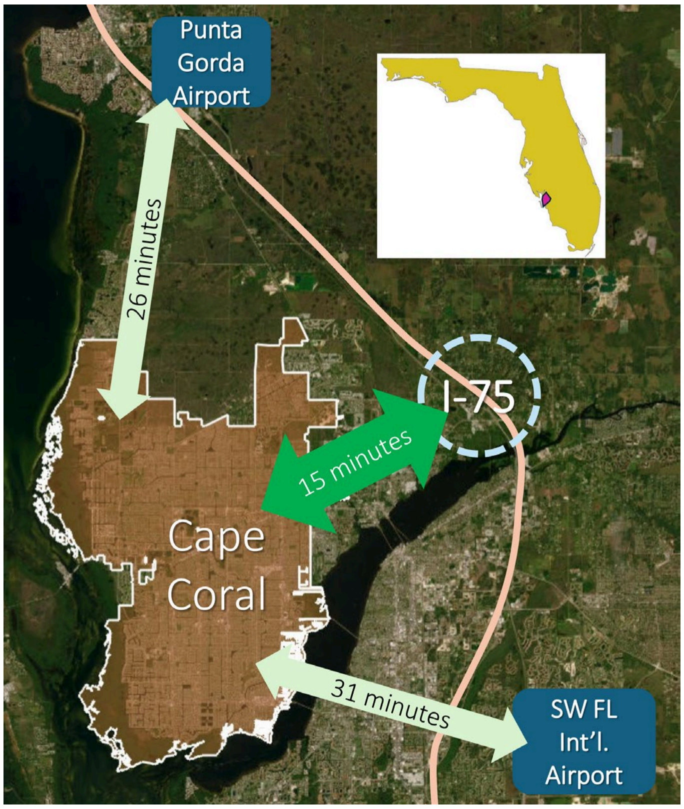
Market Potential

Cape Coral's southwest Florida location can not only cover the total Florida market but a significant portion of the US. Within a 300-mile travel distance (one day truck routing), about **6.1%** of the nation can be reached.

Highway Travel

Interstate 75 (I-75) is within **15 minutes**' drive from Cape Coral. Access to the interstate can be achieved to the eastern direction in North Fort Myers or via one of the bridges through downtown Fort Myers. To the north, access is available in Punta Gorda at a slightly longer travel time.



Air Travel

There are two airports that serve Cape Coral. Southwest Florida International Airport (RSW) is a major facility providing domestic and international flights daily. Travel to RSW is within **31 minutes** from downtown Cape Coral. RSW serves **10.1 million** passengers annually. In 2023, RSW had **87,685** aircraft operations.

Punta Gorda Airport (PGD) in Charlotte County just north of Cape Coral is a regional facility providing domestic flights mainly to the Midwest (Allegiant Air). PGD serves about **1.9 million** passengers per year and had **103,252** aircraft operations in 2023.

Rail Service

Passenger rail service via Amtrak is available in Fort Myers. The system operates **77** daily scheduled trips. Travel from downtown to Fort Myers Station Cape Coral is about **31 minutes**.

Freight rail services are provided by the Seminole Gulf Railway (SGLR). SGLR is a short line freight and passenger excursion railroad headquartered in Fort Myers that operates two former CSX Transportation railroad lines in Southwest Florida.

Bus Service

LeeTran operates bus services in Cape Coral. Currently there are **5** fixed bus routes but expanded services are under development. Looped routes provide transit to and from Fort Myers. The new Ultra On Demand micro-mobility fleet will enhance bus transit capabilities throughout the City.

Lifestyle & Recreational

Cape Coral's riverfront location and unique canal system offer a recreation-oriented lifestyle that has broad-range appeal. Some of the area's tourism advantages are as follows:

- Growing residential population, which can further encourage already existing strong category of visiting friends & family travelers
- Major home rental market for vacationers – over **4,000** homes and **350** private rooms available
- Numerous opportunities to rent a house and boat together, canals enhance rental properties
- Major hotel - Westin Resort at Marina Village – significant anchor for tourism activity
- Favorable location
- Proximity to airports, major highways, and neighboring tourist communities.
- One of safest cities in Florida
- Sports tourism – an already existing, active, and effective government involvement
- Increasingly strong restaurant and food scene
- Water activities – boating, dolphin tours, fishing, kayaking
- Winter warm weather destination
- Major League Baseball Spring Training nearby
- Active events schedule including festivals, parades, and concerts

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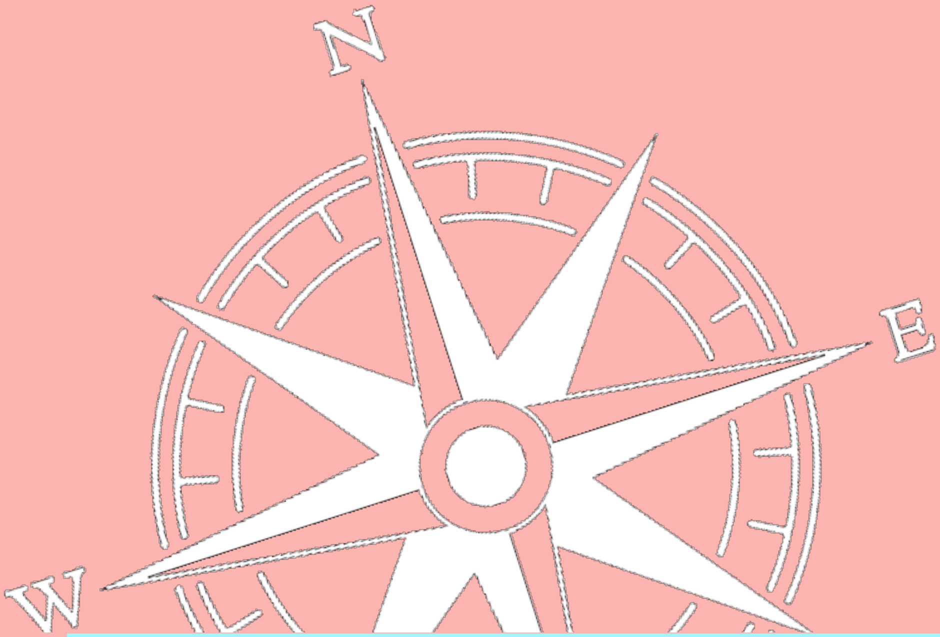
CAPE CORAL ECONOMIC DEVELOPMENT STRATEGIC PLAN

VOLUME 1 – COMPETITIVENESS & OPPORTUNTY



THE COURSE AHEAD

CAPE CORAL ECONOMIC DEVELOPMENT STRATEGIC PLAN

Volume 2 - Strategy

DCG Corplan

PARTER International, Inc. Forgey Planning

D-H&Assoc

December 2024

Acknowledgements

The Cape Coral Economic Development Strategic Plan is a comprehensive roadmap for achieving success in a uniquely challenging environment. Creation of the Strategy is not accomplished in a vacuum – there are many people and organizations that have provided valuable input to the process.

Our project team has been guided by the dedicated leadership of the Office of Economic and Business Development, the City Manager's Office, Development Services, Public Works, Communications, Information Technology Services, the Chamber of Commerce, the Lee County Visitor and Convention Bureau, and more.

We would like to thank Mayor Gunter, the City Council, and the especially the residents and businesses of Cape Coral, without whose unbiased and informative opinions and recommendations this work would not be possible.

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Contents

Establishment of Strategic Goals

Introduction

The City of Cape Coral is in growth mode. Its unprecedented population expansion is estimated to continue for at least two more decades, bringing the population to about 375,000 people. At that size, Cape Coral will be equivalent to the current population of cities such as Cleveland, OH, New Orleans, LA, or Honolulu, HI.

Cape Coral was developed as suburb of the more established business center of Fort Myers, with the expectation that its numerous canals and pre-platted single-family lots could easily be marketed to the American middle-income worker who was seeking a place in warmer climates to retire. That marketing model was so successful that Cape Coral's leadership has now realized that functioning as a modern city is the only forward direction that the community can take. Recognition is a first step in taking action, but a plan needs to be developed on how to get there.

What will Cape Coral look like in twenty-five years? What type of city should it become? These are the questions that this Economic Development Strategic Plan has striven to answer.

A city evolving from its suburban roots into a new urban paradigm as a self-sustaining network that promotes economic vitality together with lifestyle and cultural excellence.

The Vision

A city ***evolving*** from its suburban roots into ***a new urban paradigm*** as a ***self-sustaining network*** that promotes ***economic vitality*** *together with* ***lifestyle and cultural*** *excellence.*

Key phrases from the above Vision Statement form the frameworks for establishing strategic directions for Cape Coral in The Course Ahead. There five concepts that emerge that have unique meanings for Cape Coral, each with a series of goals for the City to follow to achieve success.

Framework 1: Evolution and Change

Cape Coral is an evolving city. Its growth in population over a such short time span of existence is extraordinary and the expectations for nearly a doubling in size again over the next few decades is a story worth telling. At nearly 120 square miles, Cape Coral is a large area, and its world-leading mileage of canals make the community a challenge to navigate.

Originally founded on the principal of an auto-centric suburban community, the realities of traffic congestion, the desire by residents for more urban amenities, the failure of its original plan in providing business centers, and the continuing demand on infrastructure to accommodate growth all put pressure on the basic nature of Cape Coral.

Finding a way forward so that Cape Coral has a clear concept of what type of city is becoming is essential. Change is often a painful process, and the more that open dialogues can occur that help to address and possibly mitigate those discomforts, the better the outcome. To chart a course ahead, there are two overarching goals to be achieved in this framework. Both are intended to engage the public and to develop an awareness of the impacts of evolution and change in Cape Coral:

Goal 1.a: Public Outreach Method to Discuss Innovative Approaches to Land Use

From stakeholder interviews, public and employer surveys, and numerous conversations, a disturbing issue that emerges is that Cape Coral does not appear to have any land use guidelines being utilized when approving major projects. While this is essentially untrue since there the City has Zoning controls through ordinance and code enforcement, the public nevertheless feels overlooked and is seeking some means of redressing the issue. Having a means of openly discussing how the City of Cape Coral is being shaped in the future is the thrust of this goal. The objective is to engage the public more openly on these approvals.

Goal 1.b: Develop a Branding Identity for Cape Coral

The objective is to develop a branding Identity for Cape Coral that recognizes small town "feel" with big city capabilities. Many people have the opinion that Cape Coral has an intimacy that could be threatened by over-development. Alternatively, others are impatiently seeking the urban amenities often found in other markets. The duality of large city and small town is a difficult challenge to answer. The objective is to develop an identity for Cape Coral that considers both viewpoints.

Framework 2: A New Urban Model

Cape Coral's unique location is also its drawback. This is a city with no seaports, airports, train stations, interstate highway access, or municipal bus system. In many ways, Cape Coral is just a suburban town. But, with a growing population already exceeding metropolises such as Salt Lake City, connectivity plays a crucial role in Cape Coral's future.

Goal 2.a: Cape Coral as a Network of Interconnected Neighborhoods

In all cities, neighborhoods form the basis in which residents can most easily relate to their environment. By nature of the original design of the City, there are identifiable quadrants of Cape Coral which have geographical identity. Through the street grid, fiber optics, or water canals, a connectivity exists that helps unify the neighborhoods. This vast network that might be thought by others of as detriment should be considered as Cape Coral's strength, if the quadrants can focus on promoting their individuality.

Goal 2.b: Promote Policies that Focus on Infill Development and Waterfront Accessibility

Cape Coral's land platting technique has allowed thousands of families to own a waterfront home at affordable prices. With that focus on the single-family model without implementing the needed town centers or the progressive zoning methods that would allow for mixes of commercial or multi-family integrated the landscape comes the inevitable outcome of suburban sprawl. Developers are now concentrating on mixed-use projects as a solution, but a more concentrated effort is required to salvage key properties that will promote infill and access to waterfronts.

Goal 2.c: Propose Signature Developments that will Generate Identity for the City

What makes a great city? Very often it is the landmarks that distinguish a place and make it memorable in the minds of residents and visitors. Cape Coral needs a few signature projects to help give it identity and appeal. The City can facilitate such projects through planning or incentivization or it can construct them itself.

Framework 3: Sustainability & Resilience

Sustainability and resilience are two concepts that are often used together to describe the ability to create systems that can withstand change and thrive in the face of it. The terms are complementary concepts that support each other.

Goal 3.a: Evaluate Resiliency Solutions for Impacts by Major Weather Events

Hurricane Ian was a recent reminder of the destructive nature of major weather events. Preparedness for the future as well as utilizing resiliency techniques is imperative for coastal communities such as Cape Coral.

Goal 3.b: Educate the Public on Practical Environmental Sustainability Programs

While protecting the environment is a topic of universal concern, not everyone is cognizant of the means or impacts of using environmental sustainability tools. Cape Coral is a unique waterfront ecosystem unlike those on the Gulf shores. Sensitivity to locally relevant environmental sustainability methodologies is important, as is energy and resource conservation measures.

Framework 4: Economic Vitality

Economic vitality could be called a process to improve the economic well-being of the community. It encourages employment opportunities, improves the socio- economic opportunities for citizens, expands the local tax base, and facilitates economic opportunity.

Goal 4.a: Expand the Role of the Office of Economic & Business Development

As defined in the Vision statement, it is the goal of this plan to promote economic vitality in Cape Coral, recognizing that economic growth must keep pace with population growth. This is an essential role of economic development and municipal leadership can achieve outstanding results. OEBD can play a larger role in this achieving economic vitality for Cape Coral.

Goal 4.b: Support Existing Business Retention & Expansion

Among those businesses polled, an overwhelming majority responded negatively about the permitting process for new project approvals. Maintaining a positive relationship with existing businesses is a crucial step towards economic growth. Whether by offering specialized training, business assistance, or vocational education for a new workforce, business retention and expansion is vital.

Goal 4.c: Promote New Targeted Industries and Clusters

Eight targeted industry clusters have been identified for Cape Coral. With the goal of generating **13,640** new jobs, promotion must be achieved to attract new businesses. To be effective, an incentivization for job creation, the production of industry-specific marketing materials, and tours of Cape Coral for prospective employers needs to be undertaken.

Goal 4.d: Engage Higher Education in Workforce Development

The role of higher education is essential in preparing the workforce for future jobs. While on-the-job training is widely employed, enhanced skills development must be provided for new hires or re-skilled workers in targeted industries. Successful, recruitment of new employers will depend on the availability of appropriately educated labor force and curriculum development is necessary for that support. Incubation for new business creation is also greatly dependent on partnerships with higher education.

Framework 5: Lifestyle & Cultural Excellence

To provide excellence in lifestyle and culture pursuits, the City of Cape Coral must broaden its appeal for both residents and visitors. That may require creative approaches to those drivers that will generate more interest to the City, especially in leisure activities.

Goal 5.a: Attract the Interest of Major Retailers and Hospitality Vendors

Cape Coral has a wide range of retailers, but there is a desire by residents polled to attract more major brands to the City. With no indoor regional mall and little hotel space to promote, Cape Coral must develop a means of generating appeal to major retailers and hospitality vendors.

Goal 5.b: Recognize the Importance of Tourism to the Overall Economy

Although Cape Coral is not currently considered or recognized as a destination city, it is well positioned to improve its quality, status, and reputation as a tourist destination. The City needs to invest resources to enhance its attractions and events that are currently drivers of visitor activity. New attractions need to be developed, especially in light of Cape Coral's the city's relaxed atmosphere, its connection to water, the availability to be active and involved with sports, its food scene, family friendly activities, and the many opportunities to commune with nature.

Formation of Strategic Initiatives

The Mission

In order to accomplish the strategic Vision and it accompanying framworks and goals, the next step is to define the Mission:

Provide the strategic recommendations necessary to ensure that economic growth keeps pace with population growth.

In the following pages, we provide **50** strategic initiatives within the **13** goals of the **5** frameworks. Each initiative is provided with a narrative of its relevance to the overall plan. Additional detail on priorities, needed resources, strategic objectives, budget, staffing responsibility, and milestone scheduling for each initiative is located in the Appendices.

Framework 1: Evolution & Change

Goal 1.a: Public Outreach Method to Discuss Innovative Approaches to Land Use

Initiative 1.a.1: Public Visioning Sessions for Cape Coral's Growth

It is vital for a city growing as quickly as Cape Coral to try and plan the future course of development of the community. While a primary role of government, the public needs to feel engaged in the process as well, since active civic participation is the cornerstone of successful communities.

We suggest that semi-annual visioning sessions be conducted by the Office of Economic & Business Development (OEBD) of the City Manager's Office on an ongoing schedule. These gatherings should be based on general discussions on what the City of Cape Coral should aspire to achieve in the future, possible directions for future planning, and comparisons with other communities nationwide that have experienced similar growth. It is essential that these open meetings represent high-level thinking and not descend into minutia on topics of traffic control, ordinance enforcement, or other more mundane topics best left to other types of gatherings. Video archival coverage should be provided as well as simultaneous broadcast of possible. Invited keynote speakers with real world expertise should be considered. An annual report should be prepared that summarizes the issues discussed.

We recommend that these meetings be held at the two public libraries rather than at City Hall as the nature of the discussions are better hosted at less formal environments.

Initiative 1.a.2: Committee of the Whole Public Access Website

A direct result of the public input survey and the SWOT analysis revealed a sense of disconnect by many Cape Coral residents with City leadership relative to planning for new projects or major changes to land use. As a means of providing access for the public, the City established the Committee of the Whole (COW) as forum to help interface with the public. While this effort represents a serious effort to engage the public, the access to meeting minutes or videos is somewhat cumbersome and disorienting.

The City provides archived meeting access for all departments through the City Clerk's office, some with videos. Logically, this is a good repository for information, but from a practical view, the COW represents the most important resource for public interaction with the Council. Accordingly, we recommend that the COW be provided with a new website page as well as social media linkages to promote sensitivity and responsiveness with the public. A public blog should be incorporated into the site to register comments and concerns about planned activities. When a calendar event for a major proposal that is to be discussed is scheduled, an alert should be broadcasted that will enable active residents to participate.

It is important that any new governmental website creation be compliant with the Americans with Disabilities Act (ADA). A scan[1] of the CapeCoral.gov website reveals a many non-compliance issues that could potentially lead to legal Actions by residents who feel they are denied access to information due to their disability. The entire current CapeCoral.gov site should be analyzed for compliance with ADA requirements.

Initiative 1.a.3: Citizen Advisory Committee for Public Input on Major Projects

Similar to the Lee County Citizen Advisory Committee (CAC), the Cape Coral CAC would conduct effective public information and participation programs and act as a representative panel for the purpose of advising the City Council of public opinion on policy issues. The CAC would present the reports from the Visioning sessions, summarize public response to the COW website, and attend all COW and Council meetings. The CAC would establish a new social media presence and conduct regular surveys on topics related to public investment, major projects, and social relevance.

It is in the interest of the City Council to comprehend the public's reaction to major projects or investments that affect neighborhoods or the City as a whole. Having the early detection capability provided by the CAC would enhance the approval process by mitigating objections earlier, provide compelling backgrounds and study conclusions to the public, or sharing financial or economic benefits to be achieved.

Initiative 1.a.4: Benefit/Cost Analysis for Future Projects

When major projects are announced, they inevitably incur major cost. Whether a private or public investment, the value to the community must be weighed, not just from an economic

[1] AudioEye; ADA compliance checker; https://www.audioeye.com

impact, but from a social impact as well. The Benefit/Cost Analysis (BCA) provides the tools necessary to gauge whether a project has true social merit.

BCA is a method that determines the future benefits of a proposed project and compares those benefits to its costs. Social benefits can be measured by such metrics as reduced highway fatalities, avoided costs achieved through public policy, reduction in environmental impacts etc.

We recommend that the process of Benefit Cost Analysis be universally applied to all new project approvals, from both the public and the private sector. The result is a Benefit-Cost Ratio (BCR). A project is considered cost-effective when the BCR is 1.0 or greater. By setting a benchmark, Cape Coral can be assured that the outcomes are worth the risks taken.

Goal 1.b: Develop a Branding Identity for Cape Coral

Initiative 1.b.1: Compelling Narrative and Tagline About Cape Coral

Despite some local objections, Cape Coral is evolving into a third-tier city, with a population approximating that of Cleveland, Honolulu, or New Orleans. With a larger population comes the benefits of big-city living – vitality, connectivity, income growth just to mention a few.

Cape Coral needs a new narrative. We would encourage the hiring of a major advertising or marketing firm to develop a new "story" for Cape Coral that is focused on the future. The narrative needs to illustrate how the recreation-oriented lifestyle of this Florida community offers an ideal match for self-starters and home-based entrepreneurs. This text should provide a foundation for business marketing for recruitment of new workers, and companies to Cape Coral.

The Rosen Brothers' original concept for Cape Coral as a "Waterfront Wonderland" that gave everyone a home, boating access, and waterfront property. That idea worked for thousands of new Floridians in the 1950's and 1960's, but today, the message is not as clear. The recently employed "*Flowing with Possibilities*" tagline does little to convey the unique character of Cape Coral. The effort to create memorable and inspiring message about a city on the move but struggling to find its identity is not an easy undertaking.

We recommend that the retained advertising or marketing firm be asked to develop a simple tagline for general promotion of Cape Coral. The message must be one that considers the youth of the City, its recreation character, but its potential for not having made the mistakes or investments that other cities have made.

Initiative 1.b.2: "Call to Arts" Program

As population expands north and west, cultural amenities should follow. It is important as the City embarks on highway and street beautification projects to consider art installations as vital additions. Local artists should be encouraged to place murals, sculpture, windchimes, and more to help educate the public about urban growth and the sophistication that implies.

In many locations worldwide, the impacts of hurricanes and climate change are inspiring artwork of amazing beauty and emotional appeal. The City needs to explore how the competing forces of dynamic growth and change are affected by climate and nature.   Given Cape Coral's location, the influence of water, wind, and the natural environment should be enough stimulus to inspire a group of artists to engage in creative commentary.

We recommend a City-wide "Call to Arts" program to be created that will attract national or possibly international attention. A significant prize allowance for a large response should be entertained. Installation of themed pieces in "discovery" locations throughout Cape Coral would be an engaging and delightful public amenity. A successful example of such a program was the CowParade originating in Switzerland in 1998 where fiberglass sculptures of cows were decorated by local artists.

The event was copied in major cities around the globe, with the sculptures ultimately auctioned off for charity.

Initiative 1.b.3: Events that Celebrate Both Big City and Small-Town Living

The dichotomy of big city life and small-town living is the dilemma Cape Coral presently finds itself. Cape Coral has several events that are held yearly which are successful and enjoyable, but there is always room for additions. We recommend an ambitious scheduling of events in different parts of the City that are focused on bringing residents and businesses together.

Some possibilities for events include:

- City-wide donation drive (school supplies, baby items non-perishable food, etc.).
- Black tie gala and silent auction (local business sponsorship)
- Charity concert (concert for a social cause)
- Cape Coral heritage celebration (“Waterfront Wonderland”, for example).
- Cultural food festival (different tastes, fusion, etc.)
- “Tourist in Your Own Town” (explore Cape Coral as if a tourist)
- Regional mega-markets (giant farmers markets, craft fairs, seed swaps, etc.)
- Celebrating what Cape Coral community does best (canal life)
- Skill development and community training (wellness, yoga, tai-chi, etc.)
- Community gardening days (native plants, bee-keeping, tree-planting, etc.)
- Community cleanup (parks cleaning, littler pickup, graffiti removal, etc.)
- Community field day (street fairs, local parks)
- Open mic nights (charitable donations, artists and musicians support)
- “Share a meal” with the community (communal meals on special occasions)

Framework 2: A New Urban Model

Goal 2.a: Cape Coral as A Network of Interconnected Neighborhoods

Initiative 2.a.1: Cape Coral's IT Infrastructure Promotion

The Center for Digital Government conducts the Digital Cities Survey annually to identify the most technology-advanced cities. All U.S. cities, towns, villages and consolidated city/county governments are invited to participate in this survey, which examines the overall technology programs and plans of the city. Cape Coral has placed either 2nd or 1st for three consecutive years in the survey (2017-2019).

In partnership with Lee County, a robust fiber optic cable network is being installed throughout Cape Coral, bringing high-speed internet and cable television service to virtually all locations. As part of this investment, there is an opportunity to lease excess capacity or "dark" fiber to the business or academic community that will provide revenue back to the City. The connectivity advantage for business development is a strong driver.

We would recommend that the City promote its digital advantages as well as explore areas where data aggregation provided through IT infrastructure can best be used to make citizens' lives and business operations even more productive. Efforts should be undertaken to once again receive the Digital City award.

Initiative 2.a.2 On Demand Water Mobility Transportation System

While electric scooters, golf carts, bike-sharing and other wheel-based micromobility vehicles are becoming prevalent in major cities, we would like to propose a new mobility system tailored to Cape Coral: On-demand water mobility. Cape Coral terminus locations at the ends of saltwater canals that are in proximity to major thoroughfares of Del Prado Blvd., Cape Coral Parkway, Veterans Parkway, or will serve the Bimini Basin should be considered. If parking areas at these ferry stops can be arranged, suitable property should be acquired. Alternatively, microtransit coordination between residential and ferry terminus locations could offer a unique transportation linkage system.

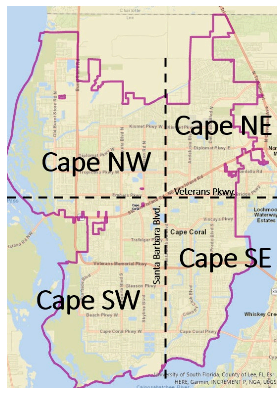
Cape Coral has a few major saltwater canals that could support water taxi service. The Rubican Canal from SE 47th Terrace northward to Viscaya Parkway could provide a scenic route that tourists and seasonal visitors renting private homes could enjoy. Similarly, the Spreader Canal water taxi line could serve larger areas of Southeast and Northwest Cape Coral. We believe that a focus should be made to make the Bimini Basin a central point in the saltwater taxi network.

The freshwater canals offer a different potential. Small electric vessels, possibly autonomous, or as micromobility boat-sharing, could operate in the weather-protected canal system. The possibility of water taxi service to attractions such as SunSplash Water Park, Festival Park, or one the many golf courses should be considered as a tourism driver of high importance.

We recommend the development of a new water taxi industry for Cape Coral. This new business line would support activities in many industries, including tourism, manufacturing, maintenance & repair, information technology, and transportation services.

Initiative 2.a.3: 4-Quadrants Commission on Neighborhood Identity and Wayfinding

In viewing the map, major roadways of Santa Barbara Blvd. and Veterans Pkwy. divide the City of Cape Coral into 4 quadrants. Creating and reinforcing the quadrant idea in advertising, politics, shopping, and entertainment can be beneficial in promoting local pride, establishing competing sporting events, food fairs, etc. It can also be helpful in citizen action by establishing an “ambassador” from each quadrant to attend Council meetings, write letters and articles, etc.



Having competing neighborhoods with their own identity may be just what the City needs and a graphic idea for street banners, perhaps T-shirts, or even murals is shown below (street banners):

We recommend the creation of an advisory 4-Quadrants Commission to study how wayfinding elements can be implemented throughout the City. This group should be made up of local merchants, active residents, artists, and City personnel whose work or living experiences orient them more toward an individual quadrant.

Goal 2.b: Promote Policies that Focus on Infill Development and Waterfront

Initiative 2.b.1: **Opportunity Multiplex Program**

In the recently prepared Need for Multi-Family Rental Apartments Study, it was noted there is an annual shortfall of about **704** units per year that are needed to meet demand by middle income groups. This affordable housing dilemma is being addressed partially in larger developments utilizing the State of Florida Live Local SB-102 workforce housing initiative, but there is also another approach that is more easily achievable.

Investment in Opportunity Zones has been successful throughout the US, with many projects focusing on affordable housing. In Cape Coral, there are two Opportunity Zones, consisting of three Census Tracts. In the most northern of the tracts, there are over 3,000 vacant single-family lots offering hundreds of site assemblage opportunities.

We propose the formation of an Opportunity Multiplex Program where higher density housing can be pre-permitted on assembled lots. In the Level-One program, a two-story duplex is constructed on **2** combined lots. Each lot contains **4** allowed units, and a total of **8** units are produced. In the Level-Two program, **3** lots are combined to produce a triplex of **12** units. In the Level-Three program, **4** lots are combined into a quadraplex of **16** units.

The Opportunity Multiplex Program can encourage low-impact development on a wide scale through the following:

- Pre-permitting and fast-tracking multiplex development in the Opportunity Zone
- Allowing property tax abatement of development impact fees
- Partial underwriting of insurance premiums for flood and wind coverage
- Identifying local Development Finance Agencies (DFAs), Community Development Finance Institutions (CDFIs), traditional lenders, tax credit investors, or other government and philanthropic grants that promote investment in Opportunity Zones
- Formation of a Rent-to-Own financing mechanism that will encourage middle-income earners to become property owners

Initiative 2.b.2: Cape Coral Land Bank

In many of the project concepts presented in this study, the tactical outcomes will depend on acquisition of existing property, both commercial and residential. By creation of a Land Bank, the goals of redevelopment can be met. The Lank Bank legislation exists in Florida, although mainly focusing on affordable housing solutions. A Land Bank may also assemble properties for redevelopment, such as tax-delinquent or abandoned properties. They can also acquire properties to convert to other uses, such as retail, parks, or open space.

We foresee the potential for a Cape Coral Land Bank (CCLB) that operates in cooperation with the City. It will function as a non-profit Public-Private Partnership (P3), with the objective of acquiring and holding prime vacant properties for transferring, reselling, or reinvesting in areas where the City would like to achieve economic development outcomes. If well-funded, the CCLB can act as equity partner in the speculative development projects led by the City, but also act independently such as acquire existing houses in key canal locations that will be re-purposed as future water taxi stops. The CCLB should be able to offer incentivized property swaps to current residents such as two-for one lot transfers or above market purchase allowances to encourage existing property owners to participate in deals that ultimately are dedicated to public good. Above all else, the core mission of the Cape Coral Land Bank must be the exercise of its responsibility to achieve positive economic development results for the City.

Initiative 2.b.3: Strategic Site Assemblage Tax Credit

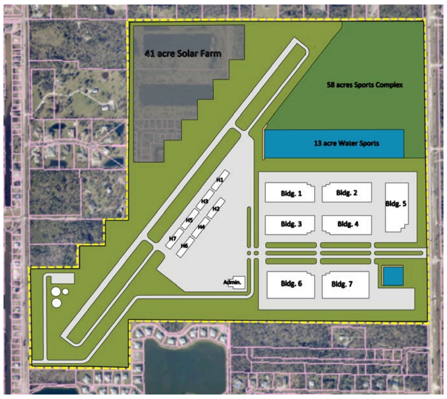
We believe that reinstituting the retired Impact Fee Deferral program as the Strategic Site Assemblages Impact Fee Tax Credit is warranted. We see the use of a site assemblage credit as particularly valuable in Cape Coral as small, platted properties continue to encourage sprawl in favor a denser urban fabric. Among the most important objective of the incentives is the promotion of affordable housing solutions. The program will defer impact fees for road and utility capital expenses on sites that assemble at least three pre-platted housing lots for development of affordable housing.

For commercial properties, we can envision that an assemblage of at least two commercial lots or an assemblage of a **50%** increased lot area accomplished by a mix of commercial or residential lots (rezoned) would trigger the incentive. A requirement for this incentive application in business use would be the application toward at least one the of the targeted industry clusters.

Goal 2.c: Propose Signature Developments that will Generate Identity for the City

Initiative 2.c.1: Cape Coral Executive Airport

Cape Coral's unique location is also its drawback. We believe that an executive airport with accompanying industrial park, recreation fields, and a solar farm represents one part of a strategy for development of signature projects that will define Cape Coral's identity for the future. An executive airport serves as a gateway to prosperity, convenience, and exclusivity. While it requires investment, the long-term benefits can significantly impact a city's growth and reputation.



The Burnt Store 300 site owned by the City of Cape Coral is the proposed location for the concept. Some additional lots would require acquisition through eminent domain. Project components include:

- Runway length: **5,000** ft (**80** ft width)
- **144,000** sf hangar space (**7** buildings)
- **180,000** sf tie-down area (**120** aircraft)
- On-site fuel storage
- **48,000** sf administration building (2-story)
- **1,175,000** sf warehouse and flex building space (**7** buildings)
- **58**-acre sports/recreation field area
- **13**-acre water sports lake
- **41**-acre Solar Farm (**7.5** MW)

The overall development cost is estimated at **$203.6 million**, with **$81.4 million** borne by the City for the airfield, hangars, solar farm, recreation fields, land acquisition, and roadways/infrastructure for the industrial park. Building construction within the park would be the responsibility of other parties.

A ten-year total economic impact of **$2.134 billion** would be gained from the development, and the City would benefit from a return of **$26** for every **$1** invested.

Initiative 2.c.2: Cape Coral Corporate Park

Aside from the Airport, Cape Coral needs to show a corporate business presence to foster competition with other markets. While the labor force is available to support such growth, the paucity of Class-A offices, modern flex industrial buildings, and high-cube warehouses is a significant drawback. To be effective, the City requires a corporate business park.

With so many companies relocating to Florida, the office and distribution industries are flourishing throughout the State. While Fort Myers continues its dominance in real estate interest, we believe that the North Del Prado Commerce Park, once slated to become the "Academic Village" is an ideal location for the business park. One issue with the property is the high degree of wetland and protected vegetative areas. As such, the more traditional layout on site will not be possible, but a careful clustering of buildings that still allow the natural environment to survive is the correct approach. The construction of office "pods" served by a centralized parking area would be a potential solution, especially for the interior areas of the site. An expansion of the existing North Cape Industrial Park along the Kismet Blvd. area of the site should be freer of environmental encumbrances to allow for flex and warehouse building construction.

The overall development cost is estimated at **$215.9 million**, with **$54.2 million** borne by the City for the roadways/infrastructure and the central parking area. Building construction other than a small administration structure would be the responsibility of other parties.

Project components include:

- **740,000** sf of Class A office space
- **627,000** sf of high-cube warehouse space
- **225,000** sf of flex Industrial space

The ten-year total economic impact of **$9.231 billion** would be gained from the development, and the City would benefit from a return of **$170** for every **$1** invested.

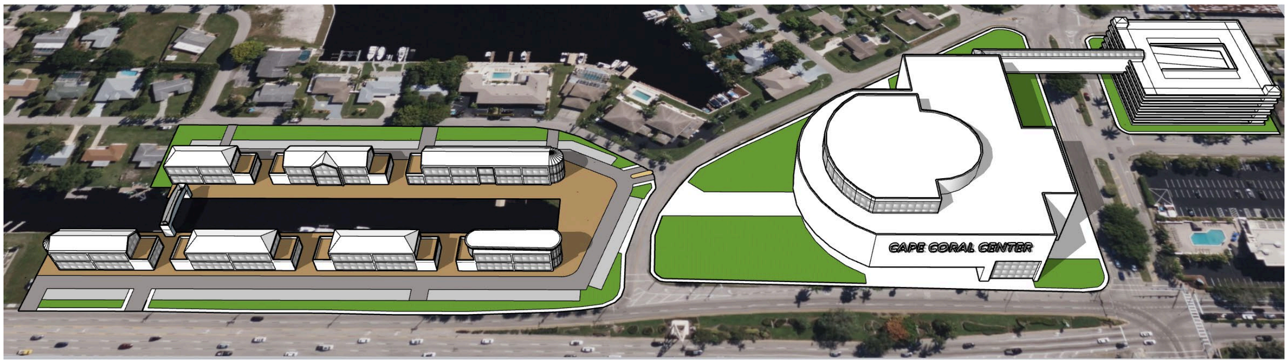
Initiative 2.c.3: Downtown Civic Center & Entertainment District

The Urban Land Institute's comments about the Downtown were as follows:

- A non-traditional downtown, seeking definition
- Created out of a linear pattern initially begun with entertainment, restaurant, and shopping uses
- A requirment for arts, music, and cultural places and events to attract a city-wide audience

To meet those objectives, we recommend the development of a new multi-function Civic Center to be constructed on a visibly dominant downtown site that will serve as a landmark for visitors and residents alike in the CRA. We have identified a vacant group of properties at the corner of Cape Coral Pkwy. and Del Prado Blvd. S that are ideal for this project. The site assemblage will support a new Civic Center, and with the addition of a new parking garage across the street served by a raised pedestrian bridge above Del Prado Blvd. With the implementation of the Civic Center, the Downtown will have a signature location that will encourage ancillary development.

In support of the Civic Center, we envision a new waterfront Entertainment District to be developed along Cape Coral Pkwy, and the Norfolk Canal. A north and South Riverwalk-style esplanade containing shops, restaurants, and bars would add the missing tourism destination that Cape Coral is needing. A possible pedestrian foot bridge above the canal connecting the north and south Riverwalk would be a exciting component to the plan. A water taxi stop at the foot of the Norfolk Canal and the Civic Center would enhance the visitor experience. If successful, we can see the addition of a second hotel to the study area.



To meet the goal, **18** private properties would need to be acquired, many not suitable for eminent domain takings. We suggest that this is an ideal application potential for the Cape Coral Land Bank in enticing property owners' relocation.

The overall development cost is estimated at **$151.7 million**, with **$116.4 million** borne by the City for property acquisition, Civic Center and parking garage construction, and utilities/infrastructure/hardscape for the waterfront area. Entertainment District building construction would be the responsibility of other parties.

Project components include:

- **196,400** sf Civic Center (Cape Coral Center)
- **740**-car parking garage with pedestrian bridge
- **90,800** entertainment, reyurant, retail space in 7 buldings

The ten-year total economic impact of **$599 million** would be gained from the development, and the City would benefit from a return about **$7** for every **$1** invested.

Framework 3: Sustainable & Resilient Growth

Goal 3.a: Evaluate Resiliency Solutions for Impacts by Major Weather Events

Initiative 3.a.1: **Low Impact Storm Water Infrastructure Program**

Given Cape Coral's unique location and degree of canal development, a particular emphasis is needed relative to storms and weather events. As Cape Coral continues to grow in population and impervious surface area, stormwater management will also increase in its demands on City services.

We recommend the implementation of a Low Impact Development (LID) wherever possible throught the City. LID is a management approach that can reduce runoff and pollutant loadings as close to its source as possible. LID includes overall site design approaches and individual small-scale stormwater management practices. These practices promote use of natural systems for infiltration, evapotranspiration, and harvesting and reuse of rainwater. Some effective LID techniques are described as follows:

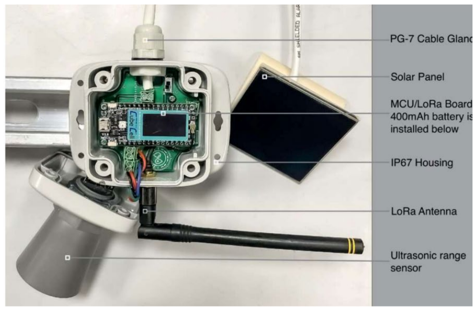
- Rain Gardens
- Bioretention
- Tree Box filters
- Permeable Pavement
- Green Roofs
- Rainwater Harvesting

Initiative 3.a.2: **Cape Coral FloodWatch Program**

Smart cities rely on data being collected, distributed and shared in real-time with all relevant stakeholders, from municipal staff to businesses and citizens. An Innovative flood monitoring system was recently developed in New York City for its low-lying neighborhoods prone to street flooding due to high tides, storm surge, and stormwater runoff. FloodNet is a series of real-time flood sensors created by New York University and the City University of

New York's CUNY Advanced Science Research Center (ASRC), with a goal of providing information on the presence, frequency, and depth of hyperlocal street-level flood events to a range of stakeholders, including policymakers, government agencies, citizens, emergency response teams, community advocacy groups, and researchers.

We would recommend that the City's Utilities and Public Works departments be engaged to consider Real-time IoT sensors that monitor street flooding and other resiliency information that can be integrated with Cape Coral's 3-1-1 network.



The FloodNet technology is open-sourced and free to use. We have already contacted the Florida Gulf Coast University's School of Entrepreneurship about developing a grant program to construct these flood sensors for municipal use.

Initiative 3.a.3: Cape Blue Incentive

Water conservation is obviously a major need in the area as water levels are falling due to lack of adequate rainfall. Innovative means of water conservation inlude lawn lawn grass replacement with water-efficient native plants and landscaping (Xeriscaping) and rain barrels and rainwater harvesting for non-potable water uses.

We propose a new Cape Blue incentive that will specifically promote water saving and storm water runoff control through bio-retention measures. The Cape Blue program will encourage businesses and homeowners to reduce water usage and to mitigate storm water runoff.

This is a **5**-year incentive that will provide a cash grant at two levels:

- **25%** reduction in water use OR **25%** stormwater run-off mitigation – starting at **$3,000** for the first year and decreasing to **$1,000** in the final year. Total payments will not exceed **$10,000**.

- **50%** reduction in water use OR **50%** stormwater run-off mitigation – starting at **$6,000** for the first year and decreasing to **$1,000** in the final year. Total payments will not exceed **$17,500**.

Goal 3.b: Educate the Public on Practical Environmental Sustainability Programs

Initiative 3.b.1: Cape Coral Eco-Newsletter and Blog

Much of Cape Coral's shoreline was historically protected by natural wetlands, principally mangrove marshes. While the benefits of mangroves include coastline erosion protection and habitat provision, the marshes are susceptible to high wind damage, harbor mosquitos, discourage wading birds, and can also conceal predators.

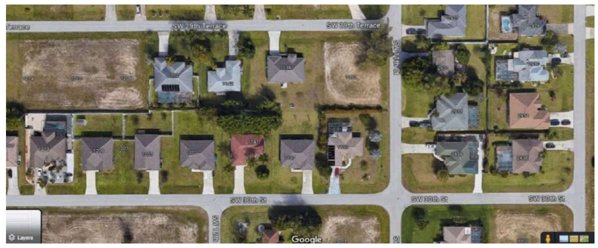
Cape Coral residents likely champion the restoration of mangrove marshes and other natural species of plant life but they may be unaware of potential health risks or impacts to existing ecosystems. A new approach toward environmental stewardship is needed that can educate the public on all aspects of environmental sustainability systems.

We recommend the creation of a monthly Cape Coral Eco-Newsletter that can be circulated both in print and online that discusses the roles of environmental stewards, the interaction of native plants with the built environment, energy sustainability, storm water mitigation, and other topics germane to the environment. A running blog post should accompany the online version of the newsletter. The Florida Gulf Coast University's Water School is the ideal author of the newsletter, and the school should be contacted for potential interest.

Initiative 3.b.2: Solar Community Cooperative Task Force

A casual examination of solar use reveals few instances of roof-top solar being employed in Cape Coral. Historically, significant restrictions imposed by electric utilities has hampered widespread solar use, mainly by the requirement that all solar generation must be connected to the utility grid. Recent changes to the net metering process allows for the "banking" of excess kWh power as credits toward usage.

Florida currently does not offer state-specific battery incentives. Additionally, none of the utility companies in Florida offer a "virtual power plant " program for homeowners. However, if a battery backup power source for a residence, all batteries above **3** kWh in size are eligible for the **30%** federal tax credit.



It would be important for the City undertake a careful study of mass solar generation and storage potentials. In individual cities such as Jacksonville, upfront rebates of **$2,000** or more may be available for installation of solar-plus-storage facilities. Cape Coral's electricity is supplied by the Lee County Electric Cooperative (LCEC), which in turn buys power from Florida Power & Light (FPL). Upsets in fuel prices directly affect Cape Coral users, resulting in higher utility bills.

Community solar is a model of buying power produced at a large solar array or farm located at another location in the utility's service area. Innovative developments such as Babcock Ranch in Chalotte County are fully invested in the solar community model.

Community solar projects are often owned by utilities or third-party developers. But some community solar projects are community-owned, where individuals set up a limited liability company (LLC) and handle all those things so that the project meets their needs and builds wealth in their community.

We recommend that a public-private Solar Community Cooperative Task Force be created to study where solar farms of varying sizes can be deployed throughout the City and how local community areas can directly benefit by becoming solar cooperatives.

Framework 4: Economic Vitality

Goal 4.a: Expand the Role of the Office of Economic & Business Development

Initiative 4.a.1: OEBD Elevation to Full Department Status

The Cape Coral Office of Economic & Business Development (OEBD) is the Economic Development Organization (EDO) for the City. Initial observation of the OEBD is that its role is one of an office or a position rather than as a City department. The OEBD serves below the Assistant to the City Manager along with the Office of Communications and Professional Compliance Officer. Recognition of the importance of Economic Development should be stressed to the City leadership.

We recommend the elevation of the OEBD to full department status, with some use of the General Fund to be allocated for the development of incentive packages, enhanced marketing programs, speculative development of catalyst projects, and increased staff. In the immediate future, the creation of a grant writing position is vital so that additional funding streams for OEBD operational budget can be achieved. Our initial recommendation is the increase in funding by at least **50%** of the current allocation.

Additionally, it might be better to move the CRA under OEBD in the new department. The CRA is a stand-alone department now in Cape Coral, but for the development of incentives and other economic development strategies, having a common level of interest with a single point of leadership could ensure more integration of resources and outcomes. In many competing Floridacities, CRAs are administered by the EDO.

Initiative 4.a.2: Independent Economic Development Website

Upon visiting the Office of Economic & Business Development webpage on the capecoral.gov site, two clickable choices are available to the user: Economic Incentives; and Site Selection. The Economic Development button redirects to a general list of incentive offerings which may or may not be relevant to the user. The Site Selection button redirects to Loopnet.com, a commercial property listing service.

Missing from the website are some important features:

- A list of the largest employers (the user should not have to download an Economic Development Activity report to find this information)
- A "Site Finder" utility with searchable fields (available property by type)
- Photography and video footage of the City by quadrant
- A library of video interviews with local employers and civic leaders (ambassadors)
- Current and relevant labor force data
- Social media coordination
- Link to Opportunity Zones databases (HUD, OpportunityDb, etc.)

Rather than serve as a simple repository of reports and also follow the graphic format of other departments, a new stand-alone Economic Development website should be created. We recommend that the City of Cape Coral retain a recognized graphic designer to create a more visually pleasing and useful website including a mobile app that utilizes the information generated in our study to present the City to prospective employers. Additionally, as the City has no tourism department and relies on Lee County or the State of Florida for this support, the economic development site will likely also need to provide a dual resource for new webpage visitors as the introduction of Cape Coral as a tourism destination. For this reason, the website will require a level of graphic quality that is missing in the current design.

Initiative 4.a.3: Economic Impact Analyses for All Capital Expense Projects

The Government Finance Officers Association (GFOA) recommends that local governments recognize the value of public infrastructure as an Economic Development Strategy. The organization suggests the use such as the Economic Impact Analysis (EIA). These analyses should be incorporated into capital plan development and updated on a regular basis.

The role of the OEBD should be one of mediator for capital expense outlays, helping to demonstrate the viability of anticipated spending in view of strategic directions the City is planning to navigate in the future. Judicious use of EIAs can be quite beneficial in helping to chart that course. EIAs are the means that job creation, direct/indirect/induced benefits, and tax revenue can be evaluated simultaneously to arrive at positive or negative recommendations.

Our suggestion is that a representative of the OEBD be educated on the use of IMPLAN software and that an annual subscription be purchased for use by the City for ongoing EIA analyses.

Initiative 4.a.4: Accredited Economic Development Organization Status

The International Council of Economic Developers (IEDC) is the premier US membership group of Economic Development Organizations (EDOs). The City of Cape Coral Economic Office of Economic & Business Development (OEBD) is already member in good standing with IEDC but we recommend elevation of the office to an Accredited Economic Development Organization (AEDO).

The AEDO program recognizes the professional excellence of economic development organizations (EDOS). The AEDO Program provides EDOs with independent feedback on their operations, structure, and procedures. With the AEDO recognition, the City's Economic Development Office will become part of an elite network of EDOS who have gone through the accreditation process. The AEDO status indicates leading authority status of economic-related issues.

We recommend that the requirements for AEDO be reviewed and that a self-examination by the Office be undertaken to determine what milestones might be needed to be reached to achieve AEDO confirmation. As an accredited organization, the OEBD will receive exclusive use of the AEDO logo for letterhead, business cards, promotional materials, and website. Accredited organizations are also profiled in IEDC publications including ED Now and Economic Development Journal.

Initiative 4.a.5: One-Stop-Shop for Business Development

For Cape Coral, the growth of small business, especially home-based establishments, is beginning to be a major factor. One-stop shops can provide a streamlined process that can help entrepreneurs cut through the red tape and get their businesses off the ground more easily.

The City of Cape Coral could effectively create a One-Stop Shop for Business Development that would have mostly virtual self-services, minimal staff, printed materials for take-home, and an accompanying on-line presence. The goal would be to facilitate all the requirements necessary to establish a new business and to ease the level of confusion by applicants.

Cape Coral's One-Stop Shop for Business Development would be administrated by the OEBD which would coordinate its activities with other departments. As the OEBD current offers, the Ombudsperson Services would have a greater role in overseeing the approval process.

OEBD's careful record-keeping of applicants' costs, numbers of steps, and success rate would form the basis for a database of business development metrics. Analytical results would then help to fine-tune the process for streamlined business development growth.

Goal 4.b: Support Existing Business Retention & Expansion

Initiative 4.b.1: Streamline the Permitting Process

A common issue with most communities is the time that development permitting requires, often delaying project timelines and incurring greater costs to the applicant. Cape Coral has made good efforts at streamlining the process through its Development Services Dept. The online permitting resource featuring the EnerGov Citizen Self-Service plugin (CSS) seems to be an efficient approach toward permit review and approval. What is not apparent, however, is the behind-the-scenes process including interdepartmental coordination.

We recommend the retaining of an independent efficiency expert who can pinpoint bottlenecks in the permitting process and recommend improvement in operations. Additionally, from review of competing cities' processes, an underlying theme for streamlining appears to be pre-certifying sites and properties for targeted uses. What is needed is a means that a user can enter a land use category and then display all available properties on the map. A downloadable database of the selections should be able to provide a list of the type of permits needed, the links to those applications from Development Services, and an approximation of the time required to obtain approvals if the intended use is executed. This could be a coordination between the new OEBD website and the One-Stop-Shop.

Initiative 4.b.2: Cape Coral Executive Corps

With the high number of retirees in Cape Coral from varied business backgrounds, there is the potential to develop teacher cadre similar to the Teach for America (Teacher Corps) program currently active in Jacksonville, Miami, and Central Florida. We recommend the active recruitment of retired executives and company owners who would care to help train the workforce for tomorrow. Afterwork and early evening classes for interested persons could be held at the two library facilities in Cape Coral which have excellent training rooms available up to 190 persons each. The use of these facilities should also be encouraged for upskilling and lifelong learning applications.

A survey of current residents should be conducted to ascertain the numbers and experience level of volunteers who would participate. Although not official trained as educators, this corps of knowledgeable business leaders could undergo some very basic teaching training by the Cape Coral Technical College and then be paid by the City for lectures or seminars that they conduct.

We believe that becoming a member of the Executive Corps would be a celebratory achievement. The OEBD should create a plaque or award program to honor those individuals who will participate.

Initiative 4.b.3: Vocational Training Silos for the Trades

From an Employer Survey conducted online, **35%** of employers felt that minor job training was needed for new hires. Most business owners (**53%**) felt that government-sponsored training might be of some possible value to their business. And **56%** felt that hiring skilled workers was the most prevalent challenge. However, only **16%** remarked that subsidized training was needed.

The mixed picture of training being a need for businesses probably indicates that businesses are unaware of training opportunities. When asked if partnerships with local educational institutions would be important, an overwhelming **61%** said that such alliances could be valuable.

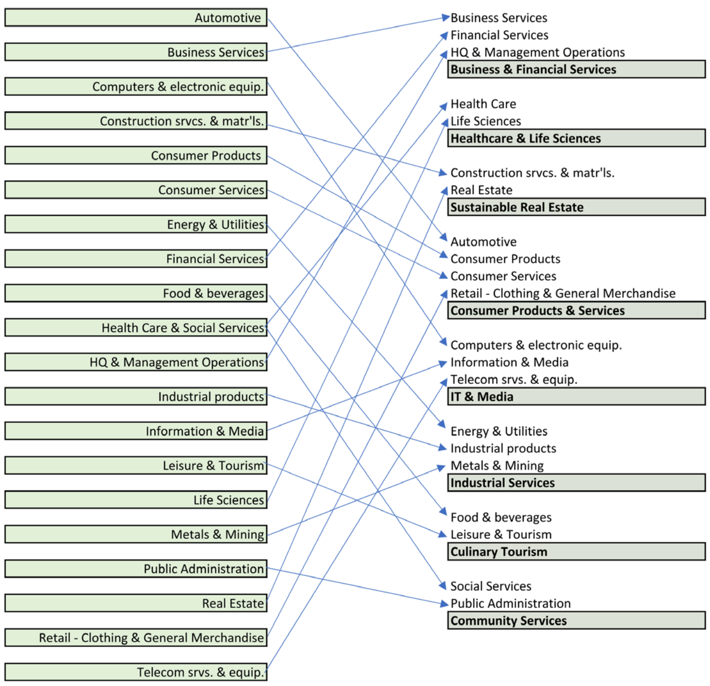
We recommend that companies already contacted through the OEBD industry roundtables or employer surveys be polled specifically for training needs. The results of this analysis will be useful for the educational providers to determine in vertical silos are being provided for new hires to be ready for employment. New technologies such as drone use in roofing and other construction trades require a new approach toward worker readiness.

Goal 4.c: Promote New Targeted Industries and Clusters

Initiative 4.c.1: Establish Working Group for Each Target Industry Cluster

From the target industry analysis, a total of **65** industries were identified as preliminary targets for Cape Coral in **11** major industry sectors. These industries represent the areas where the City should focus its marketing efforts as new opportunities for economic growth and expansion.

To determine the final cluster selections, a “crosswalk” Illustrates how rearrangement of the components leads to a logical selection of the final clusters:



In total, these industries represent a potential employment gain of **13,640** new jobs. Effective economic development applied in the attraction and recruitment of new companies in these areas should provide even greater employment results.

To recap, the new Cape Coral target industries are:

- Business & Financial Services
- Community Services
- Consumer Products & Services
- Culinary Tourism
- Healthcare & Life Sciences
- Industrial Services
- It & Media
- Sustainable Real Estate

We recommend the formation of working groups for each of the **8** clusters. Each group should consist of a representative from OEBD and the City Manager/s office, plus at least **3** industry leaders from the Cape Coral business community. Since future marketing will be needed in each cluster, the groups should have some funds available to consult with marketing or public relations firms on the types of campaigns needed for each cluster to successfully move forward.

Initiative 4.c.2: Targeted Industry Job Creation Grant

We recommend that the former Cash Incentive Program be reinstituted as the Target Industry Job Creation Grant. This would be a performance-based incentive with multiple tiers of cash awards. The incentive must be applicable to both new incoming businesses and existing business in targeted sectors. The goals of the new program would be as follows:

- For up to **25** new employees: **$1,500** per job
- For **25** or more new employees: **$2,500** per job
- BONUS ADD-ON: **$1,000** per job for businesses paying at least **110%** of the prevailing Cape Coral mean annual wage
- BONUS ADD-ON: **$2,000** per job for businesses paying at least **125%** of the prevailing Cape Coral mean annual wage

The incentives would be paid to employers who can demonstrate sustainability of employment and achievement of promised hiring goals. The cash award would be paid in a three-year installment after submittal by the grantor that employment and compensation levels were met.

Initiative 4.c.3: Target Industry Prospectuses

Marketing reports for each of the eight targeted industry clusters should be prepared that illustrate why Cape Coral is a good “fit” for technology companies. The industry prospectuses presented in Volume 1 of this report are a good start but more needs to be done. Results of the Working Groups consultation will determine the contents of each prospectus. Data developed during this study is to be updated periodically. The materials should also feature available incentives and the ongoing efforts of The Course Ahead to facilitate development. The prospectuses should be available for download from the new website as well as distributed in print form.

To recap, the new Cape Coral target industries are:

- Business & Financial Services
- Community Services
- Consumer Products & Services
- Culinary Tourism
- Healthcare & Life Sciences
- Industrial Services
- It & Media
- Sustainable Real Estate

Initiative 4.c.4: Industry Familiarization Tours

As part of a marketing and promotional strategy of the new targeted industry clusters, we recommend that the OEBD conduct industry familiarization (FAM) tours for executives of leading companies and corporate site selectors. The object of these tours is the showcasing of Cape Coral's potential. While many projects and recommendations developed in this study will not yet be realized, the City can provide marketing materials that will illustrate the new directions that the City is headed and how attraction of corporate interest would be accommodated.

FAM tours should be conducted for each cluster with special events and hospitality services prepared to highlight the industry. Travel reimbursements should be arranged to provide adequate visitor experiences for the events.

Goal 4.d: Engage Higher Education in Workforce Development

Initiative 4.d.1: Expansion of Online Learning Opportunities

Colleges within fifty miles of Cape Coral granted **12,891** degrees in 2022. Given that there are **2** four-year Florida colleges in the immediate vicinty, the opportunity for online study is quite adequate for nearly all job requirements for meeting the educational requirments on the new tarfeted indutry clusters. It is estimated the University of Florida's (UF) Online program has graduated over **4,000** students since the 2021–2022 academic year. Other institutions also offer associate and certificate degrees and awards that are suitable for those shortfall positions requiring such credentials.

Accordingly, unless there is a compelling reason to construct a new college in Cape Coral, we do not see the immediate need. A better idea would be to promote online learning as a cost-effective and reasonable alternative to expensive college education for working families. The OEBD should continue coordination with local higher education institutions in the area to expand online course offerings in the shortfall curriculums so that a work-ready labor force can be utilized to successfully support the targeted industries and clusters.

Initiative 4.d.2: Cape Coral Startup Support Center

The City of Cape Coral has effectively partnered with Florida Gulf Coast University's Small Business Development Center (SBDC) satellite office near City Hall by providing advisory services to startups. We believe, however, that a more direct effort should be enacted as a catalyst to the targeted industries and clusters.

Business incubators provide access to a shared physical space and networking opportunities with peers and experts across the full range of business disciplines. They are usually operated by nonprofit organizations that support businesses with slower, consistent growth over the long term. Business accelerators, on the other hand, are programs that provide startup businesses with capital funding, expert mentorship and access to additional resources such as supply chain and manufacturing connections. Accelerators focus on rapid business growth and typically last three to six months. The programs offer their services in return for an equity stake in the business, generally between **4%** and **10%**, depending on the program.

We recommend the establishment of a Cape Coral Startup Support Center that will operate as a hybrid between both types of programs. While the incubator component focuses on refining startup ideas and providing a supportive environment, the accelerator component will offer more structured, intensive programs to turn startups into scalable businesses. A suitable commercial space should be obtained for use and the program should be formed as

Goal 5.a: Attract the Interest of Major Retailers and Hospitality Vendors

a public-private-partnership between the OEBD and angel investors or venture capitalists. The objective will be the formation of new companies in the targeted clusters.

Initiative 5.a.1: Pop-Up Retail Fairs

Cape Coral is a large community becoming a mid-sized city but does not have a major indoor shopping mall. Likely as a result of this absence, there are many retail chains that have no presence in the City. A newer retail shift that is gaining traction in how retailers think about offering entertaining events -- "Retailtainment". This approach acknowledges the changing consumer expectations, where shopping is not just a transaction but a desirable activity in its own right. Cape Coral does not need to undue mistakes made by other communities such as having to fill acres of empty regional mall space but can chart new directions by being aware of the needs of retailers in the newer age.

We would recommend the use of "pop-up" retail events, retail fairs, and other venues to encourage chain retailers to examine Cape Coral's large buying public and recognize the revenue possibilities created by fulfilling the unmet desires of this growing population. Utilizing unique local elements such as the canals or the natural preserves can provide the backdrop to promote recreational or clothing products or services that will ultimately lead to more retail development. Wherever possible, the integration of entertainment or dining with retail should be promoted a way of enhancing the retail experience.

Initiative 5.a.2: Consumer Spending Potential Reports

From this study, a significant amount of data on the retail, food services, and hospitality industries have been examined. Where and to what degree shoppers in Cape Coral spend in local establishments can be partially tracked through AI-assisted leakage analysis. However, the effect of e-commerce continues to hamper irrational gap-leakage analyses.

We recommend that Consumer Spending Potential Reports be produced from these available data sources that can be used in marketing Cape Coral to prospective retailers and

Goal 5.b: Recognize the Importance of Tourism to the Overall Economy

hospitality vendors. The report can be assembled into sections that have applicability to individual industries.

Initiative 5.b.1: Increase Activity and Access to Cape Coral's Waterfront

The most unique aspect of Cape Coral is its relationship to water. Because of the city's development history, recreational activity along the Caloosahatchee riverfront and the vast majority of the access to the canals is privately controlled, resulting in the water activity and access falling substantially short of its potential. Better use of the riverfront can improve the connectivity to attractions between Ft. Myers and the nearby islands. The riverfront experience also represents a potential point of differentiation between Cape Coral and its nearby tourism competitors.

We recommend that the city needs to identify, attract, and work with private sector operators who can provide shoreline attractions, restaurants, etc. and activities such as water taxis, themed boat tours, fishing, sailing lessons, jet skiing, specialty boats, kayaks, canoes, etc.

Initiative 5.b.2: Promote Experiential Tourism Product by Expanding Outdoor Activities

For a destination like Cape Coral without a signature anchor attraction or "touristy" area, this trend presents an opportunity to compete with better known destinations. Cape Coral's inhabitants can provide experiences along these lines. For instance, the many different types of boating activities can be more interesting and safer when provided by a skilled local. Cooking and cocktail making classes at the city's restaurants, animal encounters in the Eco parks and on the water, and a photography tour are additional examples.

The City should work with the vacation rental community and hotels to identify, develop, and promote visitor experiences such as: outdoor and water adventure activities (zip lines, boating, etc.), Food and drink (interactive experiences at restaurants and brew masters), and Arts and culture programming (opportunities to meet artists, tour cultural and historic locations).

Initiative 5.b.3: **Explore Opportunities to Work with Short-Term Rental Providers**

Short-term rental sites (like Airbnb, VRBO, Booking.com, HomeAway) have captured a material share of the visitor market. On Airbnb alone, there are over **4,000** homes and **350** private rooms available for rental in Cape Coral. The City should work closely with short-term rental providers by educating them to be more successful; provide tourism information and improved experiences to their guests visiting the city; and should a collaboration with these various platforms be achieved, Cape Coral's marketing would benefit by reaching the various platform's global audience.

We recommend that the City develop partnership with the various rental platform sites to help with acquiring new listings and joint promotions. Explore opportunities to engage with these operators and help them attract tourists and develop more tailored experiential components for the platforms. Partner with the Ft. Myers VCB, nonprofit, or universities to educate the destination's current and potential hosts to provide a better experience for the visitors and better manage their businesses to be more profitable. Promote Cape Coral as a desirable and remote-worker friendly destination for short-term stays that tie into tourism and leisure activities.

Initiative 5.b.4: **Further Develop the Already Existing Family Activity Cluster**

With most of the City's attractions widely disbursed, one existing cluster of attractions relates to activities that are popular with youth. They are located in close proximity near Kennedy Lake - Sunsplash Water Park, new Racquet Sports Center, Gator Mikes Family Fun Park (Go Carts, Paint Ball, Mini golf, ropes course and zip line), Dance Theatre and Aerial arts, bowling alley, skate park, and Wicked Dolphin Rum Distillery. Currently, however, there is no connectivity between these attractions and no supporting infrastructure – restaurants and tourist retail.

We recommed a six-step program:

(1) Bring the current attractions together to obtain ideas as to how they can work together to better deliver a coordinated product, determine what else should be added to the mix, and how to better market and brand the family activity cluster.

(2) Identify additional family related activities such as disc golf, laser tag, golf driving range, and indoor gaming arcade with ax throwing, climbing walls, etc.

(3) Identify supporting infrastructure, such as restaurants and retail.

(4) Find interested developers to build the attractions and infrastructure.

(5) Help those developers achieve their objectives.

(6) Actively market this family friendly activity cluster.

Initiative 5.b.5: Further Develop Youth, Adult & Scholastic Sports Facilities

Sports tourism is multifaceted in that it combines travel, sports, and cultural exchange that include: Event-Based Sports Tourism - Traveling to attend major sporting events; Active Sports Tourism - Traveling to participate in sports and recreational activities such as golfing, hiking, scuba diving, or marathon running and amateur athletes traveling for competitions or training camps. Nostalgia Sports Tourism - Traveling to visit sports-related attractions such as sports museums, halls of fame, or historic sports venues; Celebrity and Icon Sports Tourism - Travel motivated by the chance to see or meet sports celebrities and icons, including attending events like autograph signings, sports conventions, or personal appearances by athletes. By devoting resources to several related areas, Cape Coral can better benefit from the already strong sports tourism to the region.

We suggest that Cape Coral can benefit from Sports tourism by 1) upgrading the current fields and building new ones; 2) working together with the Westin and other Cape Coral hotels to market to the sports tourism participants; 3) working with the home vacation rental hosts to target the youth, scholastic, and adult athletes coming to the region to compete and train and to those coming to watch spring training baseball; 4) working together with the Athletic Division to develop Pickleball competitions at the new Racquet Facility and making the sports tourism visitors aware of Cape Coral's strong food scene.

Initiative 5.b.6: Enhance & Develop New Visitor-Focused Events

Event tourism is a specialized segment of the tourism industry that focuses on the planning, development, and marketing of events to attract visitors to a destination. It is designed to enhance a destination's appeal, stimulate economic activity, and provide memorable experiences for both locals and visitors. Cape Coral already has a base of events but can benefit from additional events that are tourist focused and highlight activities that promote the city's strengths. By carefully planning, marketing, and sometimes managing events, Cape Coral can leverage these occasions to attract new types of visitors, stimulate its economy, and create lasting positive impacts on its infrastructure.

We suggest that the City's role is to stimulate and act as a catalyst to create new events that will attract tourists. Develop a committee that will review the current schedule with the objective of finding ways to enhance or create new events and festivals. Concentrate on those assets that are unique or particularly strong in Cape Coral. A pickleball tournament at the new Racquet facility, water related events such as boat races and fishing competitions, and food and music related events promoting the restaurant and food scene are examples.

Initiative 5.b.7: Support More Unique Local Dining Options & Enhanced Evening Activities

Cape Coral has an increasingly strong restaurant and food scene and is becoming known in Lee County as a place to dine out. Culinary tourism is a growing trend, with many travelers specifically seeking destinations known for their food and dining experiences. A lively restaurant scene can enhance the overall entertainment options for tourists, making the destination more appealing. A diverse restaurant scene also caters to various dietary preferences and budgets, ensuring that all tourists can find dining options that suit their tastes and needs. This inclusivity enhances the overall appeal of the destination. For all these reasons, it is a good idea to enhance what is already an important component of Cape Coral's attractiveness.

We recommend that the City **i**dentify ways to further develop infrastructure in the "food" zones and recruit restaurant operators to open unique concepts and differing cuisines in concentrated areas. Possibly create a kitchen incubator to support the growth of small food businesses that expand dining option in the City and communicate with local universities to investigate their interest in a culinary school.

Initiative 5.b.8: Encourage Cross-Promotion and Joint Packaging Among Related Attraction

The visitor experience is strengthened when multiple activities are linked together. This linking can take multiple forms, from agreements among locations to cross-promote each other's offerings, collaborative participation under a common umbrella of a "trail" to direct joint-promotion of discounted combined tickets.

We suggest that the OEBD can serve as a formal and informal convener and facilitator of partnership conversation among related attractions. These partnerships could be incentivized by promotional opportunities offered by the City or VCB. A broader approach is to develop a "Cape Coral Pass" that leverages partnerships between attractions, transportation services, hotels, and dining establishments to create value-packed deals that encourage tourists to explore more of what the destination has to offer.

Initiative 5.b.9: Energize & Educate Locals About Tourism in Cape Coral

It is important that locals become aware of the commitment that is being made to tourism and that an overall plan and specific activities have been initiated. This increases the likelihood of buy-in for tourism development from community stakeholders and elected officials. Members of the community can provide some of the best "word of mouth" advertising for the city by informing family, friends, and business colleagues of the benefit of visiting Cape Coral. In addition, tourism advertising targeted at locals will help attract residents and host vacation rental landlords to various attractions they are unaware of and help increase local pride.

We recommend that the City devote a small marketing budget targeted to locals to promoting the city's tourist attractions and overall plan. Host a one-day tourism summit for key leaders and stakeholders with speakers highlighting tourism assets and potential tourism development activities. Provide space at the tourism summit for individual attractions to have booths to promote themselves.

Initiative 5.b.10: Consider a Co-Op Marketing Approach with Certain Attractions

Co-op tourism marketing allows organizations like the VCB and the City to partner with attractions, restaurants, and tourism related retailers to pool marketing budgets and messaging, helping them more easily scale campaigns, reduce resource constraints, and pursue larger marketing efforts by offering new opportunities for campaign messaging, communications channels, and engagement tactics. Co-op marketing allows attractions to access high-value placements that they would struggle to achieve with their own resources. The VCB currently has a co-op advertising program, however, it is important to ensure that Cape Coral organizations take greater advantage of this program and find new ways to stretch their marketing dollars and test new/emerging tactics.

We suggest that the City develop a list of attractions and businesses to target for joining co-op marketing opportunities.

Initiative 5.b.11: Tourism Leadership & Collaboration / Partnerships

A primary reason that Cape Coral has not fulfilled its potential as a tourist destination is because there is insufficient discussion or understanding of the value or impact of leisure tourists visiting the City. As a result, leisure tourism has not been a priority. To build and maintain a successful tourism environment it is necessary to have two important ingredients; 1) Individuals with power and community respect who are willing to take on leadership roles to champion or be cheerleaders for tourism and 2) Effective and dynamic partnerships. The experiences and amenities that appeal to visitors to a destination often align with those that appeal to residents and businesses, and many destinations have sought to unify messaging and branding between tourism, business, and residential attraction efforts. Greater alignment and coordination are critical goals as Cape Coral has limited resources and staff capacity for its existing focus on the core audience of potential visitors.

We recommend that appropriate, well respected local leaders with an interest in and knowledge of tourism and hospitality need to be identified and approached about taking an active role in leading the charge to improve the tourism environment in Cape Coral. In addition, coordination meetings with planned agendas are needed among the potential partner organizations. Where possible, Cape Coral can seek to ensure that its tourist-facing messaging is compatible with (which does not necessarily mean identical to) messaging aimed at business and resident attraction. These collaborations and partnerships should facilitate the greater sharing of resources such as video, photography, and written content on city experiences and amenities. Additional funding sources will be needed for the City to effectively expand its impact through more destination management activities and greater alignment with Lee County efforts to attract visitors.

Initiative 5.b.12: Engage Higher Education Institutions as a Catalyst

Universities are closely tied to tourism activity in many destinations. Higher educational institutions draw visitation in the form of parents and friends, and their students are looking to engage in off-campus activities. They have a vital interest in the quality of life of the region as they compete to attract students, faculty, and staff. As a result, university leaders are often important participants in economic development, and can be leaders in visioning long-term improvements. there are several higher educational institutions in Lee County that are strategically located, and well-positioned to help support issues relevant to the tourism industry. In particular, Florida Gulf Coast University, which has specifically related programs at the School of Resort & Hospitality Management and the Water School.

We suggest that the City call a meeting of the relevant individuals at the various educational institutions of higher education and engage with them on potential areas for partnership. These include organizational and board participation, placemaking advocacy within the county and city economic development efforts. Universities may be interested partners in efforts to create workforce development pipelines that help address workforce gaps in the tourism industry and providing research and expertise through professors and internship programs.

Initiative 5.b.13: Designate an Individual to be Responsible for Tourism

Cape Coral needs to have a more clearly defined focus and take greater responsibility for increasing the number of visitors it attracts. A City employee should be designated as the individual responsible for tourism, to serve as liaison to various organizations (VCB, Chamber of Commerce, Hotel & Restaurant Association, Sports Development Department, South Cape Hospitality and Entertainment Association, etc.) on issues relating to tourism including product and event development, marketing, partnerships, and funding. Many of the recommendations listed above require an active participation by the City, and having one individual who has a command of everything that is going on will be essential.

We recommend that the City begin by giving the tourism responsibility to the appropriate person who is already on staff. It should then find one or two interns to assist this person. Finding tourism interns from the School of Resort & Hospitality Management at Florida Gulf Coast University would make sense. Over time, the City should review the current and expected future amount of tourism related work by the individual from the City Manager's office and the interns, and the return on investment from having the tourism person on staff to determine what resources are needed.

Action Plan

Introduction

In this section, we present the Action Plan for the City of Cape Coral, entitled "*The Course Ahead*". The plan is based on the strategic initiatives discussed in the preceding section, with each objective clearly identified and marked budget, staffing, and timeline estimates.

The City should recognize that a concentrated effort will be necessary to address these initiatives, many simultaneously, and in an orchestrated fashion that promotes new business attraction but also permits affordable entrepreneurship opportunities for Cape Coral residents.

The Economic Development Strategic Plan indicates the order in which the strategic plan initiatives are implemented how they are funded, and who will administer them. And as with any strategic plan, *The Course Ahead* must be considered as a "living" document that will require periodic examination and revisions as new elements or economic conditions are encountered will impact economic sustainability and growth. A summary of these findings are as follows:

Framework 1: Evolution & Change

- Public Visioning Sessions for Cape Coral's Growth
- Committee of the Whole Public Access Website
- Citizen Advisory Committee for Public Input on Major Projects
- Benefit/Cost Analysis for Future Projects
- Compelling Narrative and Tagline about Cape Coral
- "Call to Arts" Program
- Events that Celebrate Both Big City and Small-Town Living

Framework 2: A New Urban Model

- Cape Coral's IT Infrastructure Promotion
- On Demand Water Mobility Transportation System
- 4-Quadrants Commission on Neighborhood Identity and Wayfinding
- Opportunity Multiplex Program

- Cape Coral Land Bank
- Strategic Site Assemblage Tax Credit
- Cape Coral Executive Airport
- Cape Coral Corporate Park
- Downtown Civic Center & Entertainment District

Framework 3: Sustainability & Resilience

- Low Impact Storm Water Infrastructure Program
- Solar Infrastructure Research Program
- Cape Coral FloodWatch Program
- Cape Blue Incentive
- Cape Coral Eco-Newsletter and Blog

Framework 4: Economic Vitality

- OEBD Elevation to Full Department Status
- Independent Economic Development Website
- Economic Impact analyses for all Capital Expense Projects
- Accredited Economic Development Organization Status
- One-Stop-Shop for Business Development
- Streamline the Permitting Process
- Cape Coral Executive Corps
- Vocational Training Silos for the Trades
- Working Group for Each Target Industry Cluster
- Target Industry Prospectuses
- Target Industry Job Creation Grant
- Industry Familiarization Tours
- Expansion of Online Learning Opportunities
- Cape Coral Startup Support Center

Framework 5: Lifestyle & Culture Excellence

- Pop-Up Retail Fairs
- Consumer Spending Potential Reports
- Increase Activity and Access to Cape Coral's Waterfront
- Promote Experiential Tourism Product by Expanding Outdoor Activities
- Explore Opportunities to Work with Short-Term Rental Providers
- Further Develop the Already Existing Family Activity Cluster
- Further Develop Youth, Adult & Scholastic Sports Facilities
- Enhance & Develop New Visitor-Focused Events
- Support The Development of More Unique Local Dining Options & Enhanced Evening Activities
- Encourage Cross-Promotion and Joint Packaging Among Related Attraction
- Develop Locally Focused Marketing Efforts to Energize & Educate Locals About Tourism In Cape Coral
- Consider A Co-Op Marketing Approach with Certain Attractions
- Tourism Leadership & Collaboration / Partnerships
- Engage Higher Education Institutions as A Catalyst
- Designate An Individual Within the City Manager's Office to Be Responsible For Tourism

The development of an action plan requires the delineation of tasks, assignment of responsibilities, the allocation of resources, and the establishment of timelines. Implementation of *The Course Ahead* will depend on a careful balancing of the five economic drivers introduced above: Evolution & Change, A New Urban Model, Sustainably & Resilience, Economic Vitality, and Lifestyle & Culture Excellence.

Resource Matrix

The Resource Matrix is a convenient tool that summaries the resources needed to implement each of the strategic initiatives. The icons below illustrate the strategic recommendations and codes them with four action plan resource demands:

Fund-intensive resources – To complete this initiative, major capital funds may be necessary. For example, start-up or matching funds need to be put in place prior to implementation of the initiative.

Personnel-intensive resources – For these programs, staffing must be committed, or outside help engaged, for dialogues or campaigns with large numbers of people, e.g., lobbying the State legislature for incentives alterations.

Time-intensive resources – These programs will require long durations to accomplish and may also be linked with funding or personnel commitments.

Added to this list is an indicator of *Critical Importance* – the programs that are, in our view, of immediate need.

Cape Coral Resource Matrix

				Public Visioning Sessions for Cape Coral's Growth
				Committee of the Whole Public Access Website
				Citizen Advisory Committee for Public Input on Major Projects
				Benefit/Cost Analysis for Future Projects
				Compelling Narrative and Tagline about Cape Coral
				"Call to Arts" Program

Events that Celebrate Both Big City and Small-Town Living
Cape Coral's IT Infrastructure Promotion
On Demand Water Mobility Transportation System
4-Quadrants Commission on Neighborhood Identity and Wayfinding
Opportunity Multiplex Program
Cape Coral Land Bank
Strategic Site Assemblage Tax Credit
Cape Coral Executive Airport
Cape Coral Corporate Park
Downtown Civic Center & Entertainment District
Low Impact Storm Water Infrastructure Program
Cape Coral FloodWatch Program
Cape Blue Incentive
Cape Coral Eco-Newsletter and Blog
Solar Community Cooperative Task Force
OEBD Elevation to Full Department Status
Independent Economic Development Website
Economic Impact analyses for all Capital Expense Projects
Accredited Economic Development Organization Status

- One-Stop-Shop for Business Development
- Streamline the Permitting Process
- Cape Coral Executive Corps
- Vocational Training Silos for the Trades
- Working Group for Each Target Industry Cluster
- Target Industry Job Creation Grant
- Target Industry Prospectuses
- Industry Familiarization Tours
- Expansion of Online Learning Opportunities
- Cape Coral Startup Support Center
- Pop-Up Retail Fairs
- Consumer Spending Potential Reports
- Increase Activity and Access to Cape Coral's Waterfront
- Promote Experiential Tourism Product by Expanding Outdoor Activities
- Explore Opportunities to Work with Short-Term Rental Providers
- Further Develop the Already Existing Family Activity Cluster
- Further Develop Youth, Adult & Scholastic Sports Facilities
- Enhance & Develop New Visitor-Focused Events
- Support More Unique Local Dining Options & Enhanced Evening Activities

Encourage Cross-Promotion and Joint Packaging Among Related Attractions
Energize & Educate Locals About Tourism In Cape Coral
Consider A Co-Op Marketing Approach with Certain Attractions
Tourism Leadership & Collaboration / Partnerships
Engage Higher Education Institutions as A Catalyst
Designate To Be Responsible for Tourism

Summary of Priorities

Level-One Priority (low resource demand)

From the resource matrix, critical items that require the least resource demand should be set as the first priority. These represent “low hanging fruit” will be the easiest to achieve positive outcomes. The following **9** Action items are not necessarily listed in order of need:

Strategic Initiative	Duration (years)	Total estimated Cost
Public Visioning Sessions for Cape Coral’s Growth	5	$133,000
Committee of the Whole Public Access Website	10	$129,100
Citizen Advisory Committee for Public Input on Major Projects	10	$114,100
Benefit/Cost Analysis for Future Projects	10	$187,800
Independent Economic Development Website	10	$203,100
Economic Impact analyses for all Capital Expense Projects	10	$403,900
Consumer Spending Potential Reports	5	$212,300
Explore Opportunities to Work with Short-Term Rental Providers	5	$80,000
Consider A Co-Op Marketing Approach with Certain Attractions	4	$146,600
Public Visioning Sessions for Cape Coral’s Growth	5	$133,000

Level-Two Priority (moderate resource demand)

The **15** Action items of critical need but of somewhat greater resource demand are as follows:

Strategic Initiative	Duration (years)	Total estimated Cost
Working Group for Each Target Industry Cluster	5	$415,300
Compelling Narrative and Tagline about Cape Coral	3	$510,100
4-Quadrants Commission on Neighborhood Identity and Wayfinding	4	$108,000
Opportunity Multiplex Program	10	$1,147,000
One-Stop-Shop for Business Development	9	$2,523,800
Streamline the Permitting Process	4	$313,000
Cape Coral Executive Corps	4	$813,900
Target Industry Prospectuses	4	$254,800
Expansion of Online Learning Opportunities	6	$114,500
Pop-Up Retail Fairs	3	$241,900
Enhance & Develop New Visitor-Focused Events	4	$209,100
Support More Unique Local Dining Options & Enhanced Evening Activities	4	$104,800
Encourage Cross-Promotion and Joint Packaging Among Related Attractions	3	$192,700
Tourism Leadership & Collaboration / Partnerships	4	$259,100
Designate To Be Responsible for Tourism	4	$209,100

Level Three Priority (highest resource demand)

The **10** Action items of critical need but of the highest resource demand and will take the longest to accomplish with largest funding requirements are as follows:

Strategic Initiative	Duration (years)	Total estimated Cost
On Demand Water Mobility Transportation System	7	$8,160,800
Cape Coral Land Bank	4	$20,000,000
Strategic Site Assemblage Tax Credit	5	$10,000,000
Low Impact Storm Water Infrastructure Program	9	$7,080,000
Cape Coral FloodWatch Program	9	$3,016,400
Cape Blue Incentive	9	$3,507,400
OEBD Elevation to Full Department Status	3	$8,654,500
Target Industry Job Creation Grant	4	$659,100
Cape Coral Startup Support Center	7	$5,766,500
Further Develop Youth, Adult & Scholastic Sports Facilities	5	$924,700

Items of Non-Immediate Need

Although important, the following recommendations are not immediately essential. They are grouped by degree of resource demand:

<u>Low Resource demand (**2** in total)</u>

Strategic Initiative	Duration (years)	Total estimated Cost
Cape Coral Eco-Newsletter and Blog	3	$77,400
Further Develop the Already Existing Family Activity Cluster	3	$92,400

Strategic Initiative	Duration (years)	Total estimated Cost
Events that Celebrate Both Big City and Small-Town Living	5	$611,000
Solar Community Cooperative Task Force	3	$61,800
Accredited Economic Development Organization Status	3	$77,400
Vocational Training Silos for the Trades	3	$55,900
Industry Familiarization Tours	3	$292,700
Increase Activity and Access to Cape Coral’s Waterfront	4	$209,100
Promote Experiential Tourism Product by Expanding Outdoor Activities	3	$46,500
Energize & Educate Locals About Tourism In Cape Coral	4	$129,800
Engage Higher Education Institutions as A Catalyst	4	$104,800
Cape Coral’s IT Infrastructure Promotion	4	$104,800

<u>High Resource Demand (**4** in total)</u>

Strategic Initiative	Duration (years)	Total estimated Cost
“Call to Arts” Program	4	$2,442,200
Cape Coral Executive Airport	9	$83,315,600
Cape Coral Corporate Park	8	$55,322,000
Downtown Civic Center & Entertainment District	7	$119,057,800

Note: The 50 strategic initiatives are described in more detail in the Appendices.

Economic Impacts

If all 50 strategic initiatives were implemented, we estimate that an overall expenditure of **$281.3 million** would be required during an operational period of **10** years (in 2024 dollars). However, if only the action items of critical need were implemented (**34** initiatives), the total 2024-dollar cost would be **$65.0 million**. For the non-immediate action items (**16** initiatives), the total 2024-dollar cost would be **$216.3 million**.

In the table below, a cumulative 10-year timeline is presented. New **13,640** job growth economic impacts developed in the Task 3 report (refer to Technical Report) totaled **$3.358 billion** annually; however, it is assumed that job creation would take for full 10 years to materialize, so the table shows a **10%** increase yearly to reach the 10-year 100% complement.

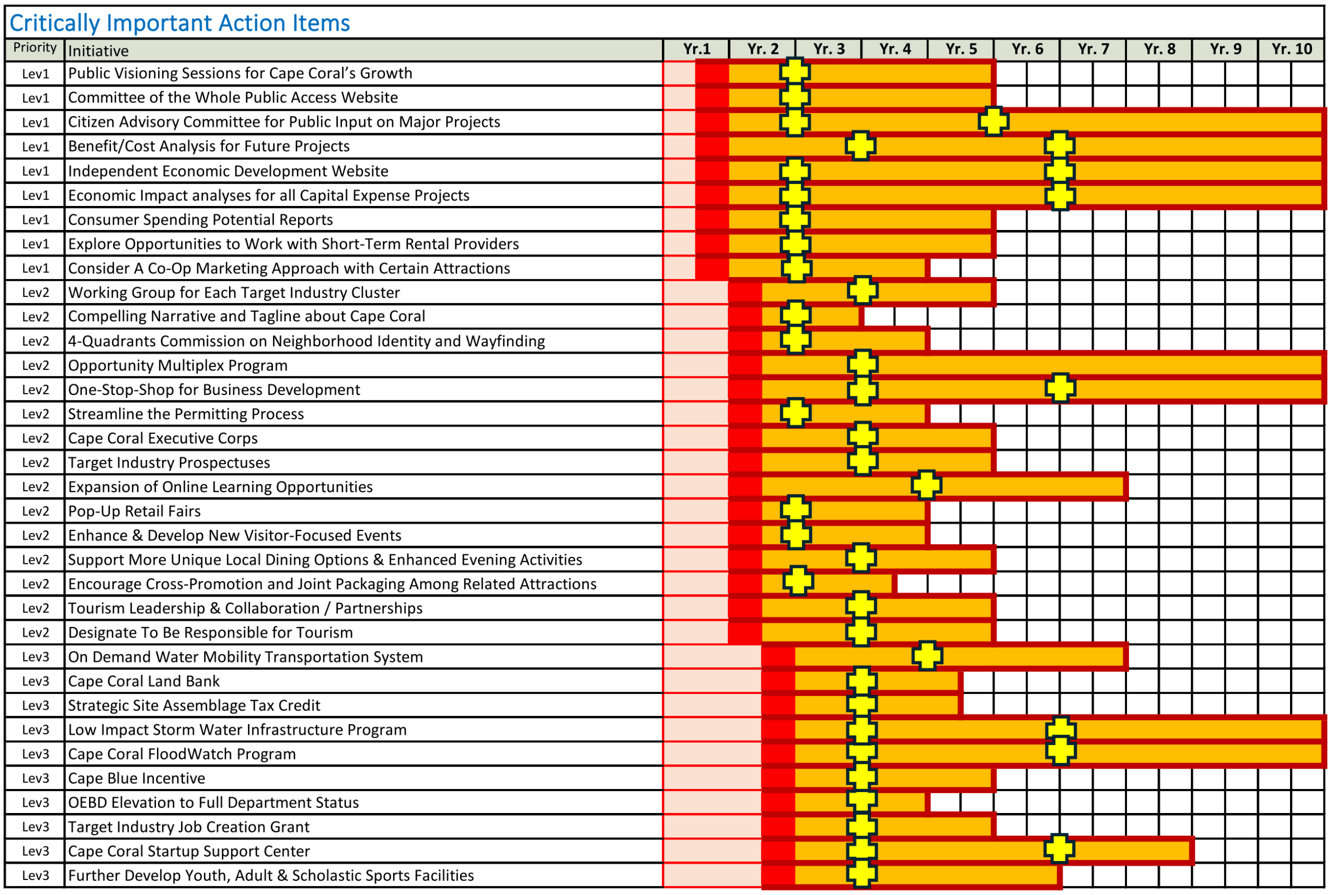
The net economic impact considers implementation of all 50 strategic initiatives. A 10-year Net Present Value NPV of **$12.526 billion** represents a return to the City of Cape Coral of nearly **$45** for each **$1** invested in the Strategic Economic Development Plan.

10-Year Timeline	Jobs Impacts	EDSP Cost	Net Impacts
Yr. 1	$ 335,756,000	$ 9,250,400	$ 326,505,600
Yr. 2	$ 671,512,000	$ 77,869,900	$ 593,642,100
Yr. 3	$ 1,007,267,000	$ 79,282,800	$ 927,984,200
Yr. 4	$ 1,343,023,000	$ 106,076,400	$ 1,236,946,600
Yr. 5	$ 1,678,779,000	$ 52,922,500	$ 1,625,856,500
Yr. 6	$ 2,014,535,000	$ 3,483,600	$ 2,011,051,400
Yr. 7	$ 2,350,290,000	$ 3,328,600	$ 2,346,961,400
Yr. 8	$ 2,686,046,000	$ 2,210,700	$ 2,683,835,300
Yr. 9	$ 3,021,802,000	$ 2,154,000	$ 3,019,648,000
Yr. 10	$ 3,357,558,000	$ 2,218,700	$ 3,355,339,300
Total	**$ 18,466,568,000**	**$ 338,797,600**	**$ 18,127,770,400**
NPV	**$ 12,806,882,000**	**$ 281,253,000**	**$ 12,525,629,000**
Return to the City of Cape Coral for Each $1 spent			**$ 44.5**

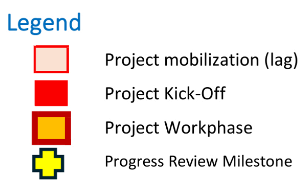
Please refer to the Strategic Initiatives Funding Schedule for more detail.

Strategic Initiatives Timeline

The Strategic Timeline indicates the implementation schedule for the Action items. It is assumed that each initiative would have varying mobilization lag (pink bars), a 6-month kick-off period (red bar), a distinct project work phase (orange bar), and important project review milestone(s) dates (yellow crosses). We recommend that Critically Important Action Items be undertaken first.



Lev1 Level 1 (high priority)
Lev2 Level 2 (modertae priority)
Lev3 Level 3 (low priorty)



Non-Immediate Action Items

Priority	Initiative	Yr.1	Yr. 2	Yr. 3	Yr. 4	Yr. 5	Yr. 6	Yr. 7	Yr. 8	Yr. 9	Yr. 10
NILR	Cape Coral Eco-Newsletter and Blog										
NILR	Further Develop the Already Existing Family Activity Cluster										
NIMR	Events that Celebrate Both Big City and Small-Town Living										
NIMR	Solar Community Cooperative Task Force										
NIMR	Accredited Economic Development Organization Status										
NIMR	Vocational Training Silos for the Trades										
NIMR	Industry Familiarization Tours										
NIMR	Increase Activity and Access to Cape Coral's Waterfront										
NIMR	Promote Experiential Tourism Product by Expanding Outdoor Activities										
NIMR	Energize & Educate Locals About Tourism In Cape Coral										
NIMR	Engage Higher Education Institutions as A Catalyst										
NIMR	Cape Coral's IT Infrastructure Promotion										
NIHR	"Call to Arts" Program										
NIHR	Cape Coral Executive Airport										
NIHR	Cape Coral Corporate Park										
NIHR	Downtown Civic Center & Entertainment District										

NIHR Non-immediate Need (high resource demand)
NIMR Non-immediate Need (moderate resource demand)
NILR Non-immediate Need (low resource demand)

Strategic Initiatives Funding Schedule

Critically Important Action Items

Note: Annual cost escalations: **3%**

Prty.	Initiative	Yr1 ($)	Yr2 ($)	Yr3 ($)	Yr4 ($)	Yr5 ($)	Yr6 ($)	Yr7 ($)	Yr8 ($)	Yr9 ($)	Yr10 ($)
Lev1	Public Visioning Sessions for Cape Coral's Growth	25,000	25,800	26,600	27,400	28,200	0	0	0	0	0
Lev1	Committee of the Whole Public Access Website	25,000	10,300	10,600	10,900	11,200	11,500	11,800	12,200	12,600	13,000
Lev1	Citizen Advisory Committee for Public Input on Major Projects	10,000	10,300	10,600	10,900	11,200	11,500	11,800	12,200	12,600	13,000
Lev1	Benefit/Cost Analysis for Future Projects	30,000	15,500	16,000	16,500	17,000	17,500	18,000	18,500	19,100	19,700
Lev1	Independent Economic Development Website	50,000	15,000	15,500	16,000	16,500	17,000	17,500	18,000	18,500	19,100
Lev1	Economic Impact analyses for all Capital Expense Projects	53,500	34,500	35,500	36,600	37,700	38,800	40,000	41,200	42,400	43,700
Lev1	Consumer Spending Potential Reports	40,000	41,200	42,400	43,700	45,000	0	0	0	0	0
Lev1	Explore Opportunities to Work with Short-Term Rental Providers	15,000	15,500	16,000	16,500	17,000	0	0	0	0	0
Lev1	Consider A Co-Op Marketing Approach with Certain Attractions	35,000	36,100	37,200	38,300	0	0	0	0	0	0
Lev2	Working Group for Each Target Industry Cluster	200,000	51,500	53,000	54,600	56,200	0	0	0	0	0
Lev2	Compelling Narrative and Tagline about Cape Coral	165,000	170,000	175,100	0	0	0	0	0	0	0
Lev2	4-Quadrants Commission on Neighborhood Identity and Wayfinding	25,800	26,600	27,400	28,200	0	0	0	0	0	0
Lev2	Opportunity Multiplex Program	100,000	103,000	106,100	109,300	112,600	116,000	119,500	123,100	126,800	130,600
Lev2	One-Stop-Shop for Business Development	0	1,150,000	154,500	159,100	163,900	168,800	173,900	179,100	184,500	190,000
Lev2	Streamline the Permitting Process	265,000	15,500	16,000	16,500	0	0	0	0	0	0
Lev2	Cape Coral Executive Corps	0	575,000	77,300	79,600	82,000	0	0	0	0	0
Lev2	Target Industry Prospectuses	0	175,000	25,800	26,600	27,400	0	0	0	0	0
Lev2	Expansion of Online Learning Opportunities	0	60,000	10,300	10,600	10,900	11,200	11,500	0	0	0
Lev2	Pop-Up Retail Fairs	0	85,000	77,300	79,600	0	0	0	0	0	0
Lev2	Enhance & Develop New Visitor-Focused Events	50,000	51,500	53,000	54,600	0	0	0	0	0	0
Lev2	Support More Unique Local Dining Options & Enhanced Evening Activities	0	25,000	25,800	26,600	27,400	0	0	0	0	0
Lev2	Encourage Cross-Promotion and Joint Packaging Among Related Attractions	0	130,000	30,900	31,800	0	0	0	0	0	0

Lev2	Tourism Leadership & Collaboration / Partnerships	0	100,000	51,500	53,000	54,600	0	0	0	0	0
Lev2	Designate To Be Responsible for Tourism	0	50,000	51,500	53,000	54,600	0	0	0	0	0
Lev3	On Demand Water Mobility Transportation System	1,161,100	1,162,600	1,164,100	1,165,700	1,167,400	1,169,100	1,170,800	0	0	0
Lev3	Cape Coral Land Bank	5,000,000	5,000,000	5,000,000	5,000,000	0	0	0	0	0	0
Lev3	Strategic Site Assemblage Tax Credit	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	0	0	0	0	0
Lev3	Low Impact Storm Water Infrastructure Program	0	2,500,000	515,000	530,500	546,400	562,800	579,700	597,100	615,000	633,500
Lev3	Cape Coral FloodWatch Program	0	2,100,000	103,000	106,100	109,300	112,600	116,000	119,500	123,100	126,800
Lev3	Cape Blue Incentive	0	3,050,000	51,500	53,000	54,600	56,200	57,900	59,600	61,400	63,200
Lev3	OEBD Elevation to Full Department Status	0	2,800,000	2,884,000	2,970,500	0	0	0	0	0	0
Lev3	Target Industry Job Creation Grant	0	500,000	51,500	53,000	54,600	0	0	0	0	0
Lev3	Cape Coral Startup Support Center	0	5,100,000	103,000	106,100	109,300	112,600	116,000	119,500	0	0
Lev3	Further Develop Youth, Adult & Scholastic Sports Facilities	0	580,000	82,400	84,900	87,400	90,000	0	0	0	0
Subtotal Critical Needs		**9,250,400**	**27,764,900**	**13,100,400**	**13,069,700**	**4,902,400**	**2,495,600**	**2,444,400**	**1,300,000**	**1,216,000**	**1,252,600**
10-yr Total			**76,796,400**								
Net Present Value (NPV)			**64,992,900**								

Non-Immediate Action Items

Prty.	Initiative	Yr1 ($)	Yr2 ($)	Yr3 ($)	Yr4 ($)	Yr5 ($)	Yr6 ($)	Yr7 ($)	Yr8 ($)	Yr9 ($)	Yr10 ($)
NILR	Cape Coral Eco-Newsletter and Blog	0	25,000	25,800	26,600	0	0	0	0	0	0
NILR	Further Develop the Already Existing Family Activity Cluster	0	40,000	25,800	26,600	0	0	0	0	0	0
NIMR	Events that Celebrate Both Big City and Small-Town Living	0	115,000	118,500	122,100	125,800	129,600	0	0	0	0
NIMR	Solar Community Cooperative Task Force	0	20,000	20,600	21,200	0	0	0	0	0	0
NIMR	Accredited Economic Development Organization Status	0	25,000	25,800	26,600	0	0	0	0	0	0
NIMR	Vocational Training Silos for the Trades	0	35,000	10,300	10,600	0	0	0	0	0	0

NIMR	Industry Familiarization Tours	0	230,000	30,900	31,800	0	0	0	0	0	0
NIMR	Increase Activity and Access to Cape Coral's Waterfront	0	50,000	51,500	53,000	54,600	0	0	0	0	0
NIMR	Promote Experiential Tourism Product by Expanding Outdoor Activities	0	15,000	15,500	16,000	0	0	0	0	0	0
NIMR	Energize & Educate Locals About Tourism In Cape Coral	0	50,000	25,800	26,600	27,400	0	0	0	0	0
NIMR	Engage Higher Education Institutions as A Catalyst	0	25,000	25,800	26,600	27,400	0	0	0	0	0
NIMR	Cape Coral's IT Infrastructure Promotion	0	25,000	25,800	26,600	27,400	0	0	0	0	0
NIHR	"Call to Arts" Program	0	610,000	610,300	610,600	611,300	0	0	0	0	0
NIHR	Cape Coral Executive Airport	0	48,840,000	32,560,000	250,000	257,500	265,200	273,200	281,400	289,800	298,500
NIHR	Cape Coral Corporate Park	0	0	32,610,000	21,651,800	163,900	168,800	173,900	179,100	184,500	190,000
NIHR	Downtown Civic Center & Entertainment District	0	0	0	70,080,000	46,724,800	424,400	437,100	450,200	463,700	477,600
Subtotal Non-Immediate Needs		**0**	**50,105,000**	**66,182,400**	**93,006,700**	**48,020,100**	**988,000**	**884,200**	**910,700**	**938,000**	**966,100**
10-yr Total		**262,001,200**									
Net Present Value (NPV)		**216,259,900**									

All 50 Action Items										
	Yr1 ($)	**Yr2 ($)**	**Yr3 ($)**	**Yr4 ($)**	**Yr5 ($)**	**Yr6 ($)**	**Yr7 ($)**	**Yr8 ($)**	**Yr9 ($)**	**Yr10 ($)**
Subtotal	**9,250,400**	**77,869,900**	**79,282,800**	**106,076,400**	**52,922,500**	**3,483,600**	**3,328,600**	**2,210,700**	**2,154,000**	**2,218,700**
10-yr Total	**338,797,600**									
Net Present Value (NPV)	**281,253,000**									

In the preceding sections, the DCG Corplan Team has developed the strategic initiatives that will enhance the attraction, expansion, and creation of new businesses in Cape Coral. Many of the presented initiatives address these topics, with the concept that before new businesses can be attracted to the City, there must first be movement toward providing the physical and labor environment that new employers are seeking.

With that effort commencing, a parallel promotions effort can then be initiated. Marketing to prospective target industries and cluster companies is a lengthy process and will require funding and coordination beyond the strategic recommendations outlined hereto. But, the message that Cape Coral is on the move forward can be brought to the market's attention.

This task provides a continuation of the strategic plan by quantifying the promotional activity required to effectively communicate with the target market. The report delineates marketing and promotions strategy in considerable detail. A strategy is presented that centers on the two central themes: branding and promotion of Cape Coral as an untapped market for new business development; and, a direct outreach to the **8** recommended target industry clusters.

Visioning

In Initiative 1.a.1, we suggest that semi-annual visioning sessions be conducted by the Office of Economic & Business Development (OEBD) of the City Manager's Office on an ongoing schedule. These gatherings should be based on general discussions on what the City of Cape Coral should aspire to achieve in the future, possible directions for future planning, and comparisons with other communities nationwide that have experienced similar growth.

For now, the Vision statement for the Strategic Plan is this:

"A city evolving from its suburban roots into a new urban paradigm as a self-sustaining network that promotes economic vitality together with lifestyle and cultural excellence."

With continuing public input and City guidance, it is expected that the statement will change over time as well as be accompanied by a Mission statement. In Volume 1, the mission is identified as follows:

"Provide the strategic recommendations necessary to ensure that economic growth keeps pace with population growth."

In forming a new identity for Cape Coral, a Mission Statement for the effort needs to be developed that also reflects unique leadership in affecting change in real estate, education, and government. Key elements to the new Statement should include:

- Definition of the Mission
  - Fundamental reason why the effort is being enacted
  - Establishes the range of the effort's activities
  - Provides an overall direction for the effort
  - Acts as a foundation for developing goals and objectives
- Characteristics of a Good Mission Statement
  - General, not specific
  - Looks to the future, not the past or present
  - Reflects the community's unique strengths
- Sub-Steps
  - Agree on the general purpose of the effort
  - Decide what groups and markets the effort is designed to serve
  - Decide on the scope of the effort's activities

OEBD should lead the Vision and Mission Statements activity and involve local business and government leaders in a series of round tables meetings or net forums to recognize the mutual need for the strategic economic plan (The Course Ahead) and to bring it to fruition. One of the chief ways to achieve the objective is through a comprehensive public relations program that would highlight the advantages for business investment in Cape Coral in the relevant national and international media. A key component of successful outreach to the media is branding.

Branding

In Initiative 1.b.1, we recommend the retaining of a qualified advertising or media firm to develop a new “brand” and compelling narrative about Cape Coral. In marketing, a brand is a traditional advertising method used to create an acquired response from a target audience based on cumulative impressions and positive reinforcement. It is also the symbolic embodiment of all the information connected with a product or service. A brand typically includes a name, logo, and other visual elements such as images or symbols. It also encompasses the set of expectations associated with a product or service which typically arise in the minds of people.

In economic development marketing, branding achieves a similar response. The San Jose Valley in California would be less memorable without its more common name of Silicon Valley. The image of silicon material is one that is synonymous with computers, and is used widely by other communities that have successfully fostered high-tech industry development, e.g., Silicon Hills (Austin, TX), Silicon Alley (NYC), Silicon Desert (Phoenix, AZ), Silicon Beach (Santa Barbara, CA) and Silicon Glen (Glasgow, UK).

As the selected firm develops media and graphics for the new efforts, a principle should be kept in mind. Cape Coral is an evolving marketplace trying to find a new pathway in major urban development. For many traditional marketing programs, this represents untested waters, so innovation and imagination are key. OEBD and the City must guide the branding work towards creating a unique story that will compel business leaders around the nation to focus on the City of Cape Coral for new location potentials.

Public Relations

Cape Coral now has many strategic initiatives that will benefit from the development of a brand that will be widely used throughout advertising and public relations. As part of this strategy, we suggest the retaining of a qualified national public relations firm with expertise in economic development marketing. A Request for Proposal should be issued that covers some or all of the following items:

- Develop comprehensive strategic outreach to reach regional, national and international business media with key messages.

- Define appropriate media markets based on existing research and information of the City's profile.
- Develop and maintain current lists of customized media contacts for television, radio, print, and Internet.
- Create a national media kit with current background for spokespersons.
- Pitch storylines to major business publications and media to heighten awareness of Cape Coral's emerging business environment.
- Secure story placement and raise the quantity and quality of favorable business coverage for the City in regional/national media.
- Place Cape Coral guests on regional/national TV and radio talk shows and in print, placing particular focus on opportunities for relevant elected officials and private sector leaders to speak on economic, technological, or other developments that enhance the City's reputation as a place in which to do business.
- Organize tours by local public and private sector leaders to media centers such as New York, Washington DC, Chicago, Los Angeles and San Francisco.
- Develop and pitch op-eds, talking points and factsheets.
- Plan and implement in-market trips for press visits to Cape Coral.
- Arrange press interviews with OEBD officials at relevant trade and professional conferences.
- Secure speaking engagements by Cape Coral public and private sector leaders at trade conferences and other relevant business venues.
- Develop an internal public relations campaign to inform City allies and partners of its successful marketing and media results.
- Provide ongoing consultative services to OEBD on a variety of public relations and economic development marketing issues.
- Track ad equivalency and impact of editorial results.

Public relations and advertising is potentially a very expensive undertaking. The cost estimate for a three-year implementation of Initiative 1.b.1 is **$510,100**, and the ultimate budget for an overall marketing campaign could easily reach five to ten times this figure. OEBD should seek immediate application to funding sources such as the Duke Energy Foundation, FloridaCommerce, or the Competitive Florida Partnership Grant that can be used for marketing. Identifying other potential resources for reducing costs will be paramount as new allocations are being considered.

Target Industries Outreach

In Volume 1, the DCG Corplan Team generated **8** clusters of target industries supportable by Cape Coral. To recap, these are as follows:

- Business & Financial Services
- Community Services
- Consumer Products & Services
- Culinary Tourism
- Healthcare & Life Sciences
- Industrial Services
- It & Media
- Sustainable Real Estate

Attraction of interest by company executives in these industry areas may be a long process, requiring several strategic approaches, including direct marketing and mail, print and digital advertising, field missions, trade shows, and media marketing.

Direct Mail Campaigns

Audience identification is the increasingly complex (and the least understood) aspect of direct marketing in economic development. Corporate structures vary widely from firm to firm, and there is rarely one executive specifically in charge of expansion or relocation of the company's facilities.

In large corporations, "gatekeepers" (secretaries and administrative assistants) seek to protect chief executive officers from streams of unsolicited promotional materials arriving daily. Marketers must find ways to circumvent interceptors to get the CEO's attention. While the traditional primary audience for economic development solicitation had been centralized corporate real estate executives, these departments were largely decimated by cost-cutting in recent years in favor of outsourcing to real estate consultants.

Expansion or relocation projects in most large companies increasingly are handled by temporary task forces of personnel drawn from various departments (although that committee may contract with specialists for technical assistance). Identifying the team leader is essential for promoting an area as a location candidate.

Under the circumstances, focus of solicitation on a single contact does not assure that the promotional material will reach other decision makers in that prospect firm. Until a project manager can be identified, therefore, the marketing effort should reach out to several "C" level officers, e.g., the Chief Executive Officer (CEO), Chief Operating Officer (COO), Chief Financial Officer (CFO), Chief Administrative Officer (CAO), and/or Chief Information Officer (CIO), depending upon the nature of the targeted activity.

Direct Mail – Strategic Approach

Before launching a direct mail (or e-mail) campaign, an industry-specific prospectus (e.g., Volume 1 documents) should be prepared in both glossy hard copy and electronic format. Next, verified mailing lists should then be obtained from reputable sources (such as Dun & Bradstreet/Hoovers, Standard & Poor's, or Ward's/Gale), requesting their advance estimate of the number of companies and number of contacts in the targeted industries or clusters.

As outlined below, the direct marketing program should extend through a series of steps and frequent follow up to culminate in closing of the deal:

Initial Contact: INTRODUCTORY LETTER

- Objective: To familiarize the prospect with basic advantages in Cape Coral for the industry and encourage a request for additional information
- Timing: ASAP (May be conducted in cycles, cluster by cluster)
- Activity: Prepare letters, envelopes, and reply card

Text for initial letter:

Dear (Contact Name):

A comprehensive study just completed by a leading location consultant finds that your industry can achieve outstanding operating results in Cape Coral, Florida:

- Base of technical competencies
- Qualified graduates of college, university, and technical schools
- Favorable payroll costs
- Business-friendly state and local government
- Comprehensive support services
- Access to capital
- Liberal incentives

At no obligation or cost to you, we offer to provide a more detailed analysis for a model facility in your industry in Cape Coral. Please return the accompanying response card for your free report.

Text for Response Card

[ ] YES, please provide a free copy by e-mail of the report on opportunities for my industry in Cape Coral, FL

- Name and title Company
- Mailing address
- Telephone
- E-mail address

Second Contact: INFORMATION PACKET

- Objective: To increase the prospect's level of interest
- Timing: Immediately upon receipt of the reply card from prospect
- Activity: Provide an e-mail attachment of the industry-specific report to increase the prospect's interest level

Third Contact: TELEPHONE CONFERENCE

- Objective: To determine more about the prospect's interest and obtain details on the project, if possible
- Timing: Not later than one week after transmission of the requested report
- Activity: Confirm receipt of the report, establish a dialog with the prospect to answer any questions, and seek details on location requirements and site selection criteria

Fourth Contact: CONFIRMATION LETTER

- Objective: To thank prospect for the opportunity and request meeting or visit to Cape Coral
- Timing: Within two days after telephone conference
- Activity: Prepare the letter and submit answers to questions

Fifth Contact: MEETING WITH ACTIVE PROSPECT

- Objective: To make across-the-desk presentation of Cape Coral's attributes and qualifications based upon firm's requirements
- Timing: At the prospect's earliest convenience
- Activity: Set up meeting schedule and travel arrangements

Sixth Contact: PROPOSAL

- Objective: To provide a detailed proposal to the prospect, including site price, training program, tax credits, tax abatement, and infrastructure grants
- Timing: One to two weeks after meeting with the prospect
- Activity: Prepare the proposal and obtain acceptance

Subsequent Contacts: FOLLOW UP

- Objective: To maintain continuing dialog with prospects
- Timing: 30-day intervals or until prospect signals no further interest
- Activity: Send letters, news items, announcements, etc.

Final Step: CLOSE THE DEAL

- Objective: Finalize the agreement, announce the project, and obtain maximum leverage for developing the cluster
- Timing: Upon prospect's decision in favor of Cape Coral
- Activity: Ground breaking ceremony and press releases

Print & Digital Advertising

Direct mail campaigns may not reach all of the potential prospects in an industry, so Cape Coral should also consider placing space advertisements in pertinent print magazines with digital channels. Such ads will broaden the dissemination of the message and should lead to more prospects in the target clusters.

Costs for advertising in general business publications, however, can be prohibitive. For example, a full-page ad in Forbes print edition is currently priced at **$50,000** in the print version. Digital rates run from **$25,000** to **$249,000** or more.

Print & Digital Advertising – Strategic Approach

A better way to reach the target audiences may be through ad placements in the technical trade journals widely read by each sector. The following trade journals are considered most popular in each of the targeted industry clusters:

Business & Financial Services

- Advisor Today
- Chief Executive
- Florida Trend
- Independent Banker
- Investor Relations Business
- Worth

Community Services

- Cape Coral Living
- Florida at Home
- New Mobility
- Senior Living Executive
- Social Work Today
- The Rehabilitation Professional

Consumer Products & Services

- Casual Living
- Home Furnishing News
- Profile Magazine
- Retail Week
- RetailWire
- Women's Wear Daily

Culinary Tourism

- Bon Appetit
- Food Network
- Food Truck Operator
- Nation's Restaurant News
- Progressive Grocer
- The Nibble

Healthcare & Life Sciences

- American Journal of Managed Care
- BioPharm International
- Community Health
- Health magazine
- Modern Healthcare
- Today's Clinical Lab

Industrial Services

- Advanced Materials & Processes
- Control Engineering
- Cutting Tool Engineering
- Industrial Equipment News
- Industry Today
- Modern Metals

IT & Media

- Adweek
- American Media
- CIO
- Greenwire
- Information Week
- WIRED

Sustainable Real Estate

- Business Facilities magazine
- Florida Trend Magazine
- Greenwire
- National Relocation & Real Estate
- Engineering News Record
- Real Estate Business

Digital ad rates tend to be significantly less expensive than print versions. However, some recent studies have shown that print media often delivers better results in areas like response rates, conversions, and brand recall. In advertising, digital fatigue is a growing issue and organizations that continue to leverage print in their marketing mix will see tangible results that are harder to achieve through digital channels alone.

Field Missions

A field mission draws upon business representatives from a number of identified target sectors which are deemed to hold the greatest mutual promise for new business development within the host community. Field missions help economic development organizations position themselves in markets where competition is fierce. These visits are more about opening doors and developing long-term relationships than trying to make sales or close deals.

Field Missions – Strategic Approach

To the extent possible, travel to meetings with active prospects in a target industry should be coordinated with calls on other potential candidate firms in the same geographic area (with dates and times confirmed in advance). Since these calls are likely to involve prospects in a broad range of industries, Cape Coral representative(s) must be briefed on key findings of the Strategic Plan report.

With travel costs straining many budgets, field visits must be strategically planned. Often, collateral visits to local businesses in the cities where a trade show attendance is planned will prove an efficient use of limited travel dollars.

Trade Shows

There are thousands of trade shows held every year, and economic development agencies are renting booths in the leading shows. Some of the more important shows for the outreach on Cape Coral include:

- Consumer Electronics Show (CES)
- International Council of Shopping Centers (ICSC)
- MedTrade Expo & Conference
- International Manufacturing Technology Show (IMTS)
- The National Restaurant Association (NRA)
- National Association of Realtors (NAR)

Cape Coral officials should be cautioned as to the costs and personnel requirements of staffing trade shows, and therefore only shows that have the most likely fit for the strategic plan should be considered. Space rental at large shows can be prohibitive, and a typical industry show package provides a furnished **10** ft x **10** ft space at between **$10,000** and **$20,000**.

Trade Shows – Strategic Approach

Staffing a booth at trade show may not always be the most effective way of "working" the show. It may be more advantageous to bring a group of "ambassadors" to the show to meet with prospective companies.

Each show will list exhibitors in advance usually with contact information, and a proactive telephone campaign designed to arrange brief visits at the booths of interested parties can produce marketable results. The following is a proven script that economic development organizations have used successfully:

Script for Trade Show:

> *Call and ask for Sales Manger. Say you are calling in reference to the tradeshow, and ask who from the company will be attending the show.*
>
> *"Hello, my name is ___. My I please speak to*
>
> *______(contact name from exhibitor sheet).*
>
> *I'm calling in reference to the tradeshow. Members of our economic development organization will be attending the show and would like to stop by your booth and visit for a few minutes. We would like to discuss opportunities for your business within our state, and, in more detail, our community."*
>
> *If they are receptive:*
>
> *"What time on any of the three days would be convenient? (book a 15-minute time on the sheets -- no more than 2 appointments at the same time)."*
>
> *If you get voice mail:*
>
> *"Would you please return my call with a convenient time for our representative to stop by your booth? We can be reached at the following number….. Thank you."*

Other effective ways of attending the show is to sponsor a hospitality suite in the accompanying hotel, and if possible, provide an off-site dinner for a group of invitees at a local restaurant. Many attendees grow tired of the constant activity of the show and especially look forward to quieter meetings and higher food quality. By attracting a smaller but more attendant group, the economic development message is easier to convey.

SHOW COPY BELLYBANDS

If the tradeshow is sponsored by a publication, a show copy will probably be produced. For effective marketing, many exhibitors will have advertising bellyband printed and added to the show publication for personalized distribution.

Radio & Television Media

Both radio and television (broadcast or cable) offer special ways of reaching the target audience, but at differing methods and costs. State and regional economic development budgets allow for national TV advertising, but smaller areas such as Cape Coral would be most likely relegated to public access television or local radio which, unfortunately, cannot serve a broad enough base.

Other Media – Strategic Approach

Cape Coral should attempt to be featured on a PBS or National Public Radio broadcast for an outstanding community achievement. It would be particularly significant if the news item focused on technical education advancements, since this is a “hot” button for the target industries. With media produced by the broadcaster, the costs for a “spot” are alleviated, and only duplication and distribution of the recorded media is necessary to have digital format available for marketing use.

Social Media

Economic development agencies use social media to primarily promote their region's business opportunities, showcase local success stories, attract potential investors, engage with the community, and build brand awareness by highlighting the unique features and advantages of their area, often utilizing platforms like LinkedIn, Facebook, X, and Instagram to reach a broad audience and foster connections with stakeholders.

Key ways that Cape Coral can leverage social media for marketing:

- Sharing success stories of existing businesses, showcasing new companies that have recently established in the City, and featuring different industry sectors to attract diverse investments.
- Sharing visuals and information about the Cape Coral's infrastructure, including transportation networks, utilities, and available real estate to entice potential companies.
- Announcing local business events, conferences, and networking opportunities to attract potential investors and entrepreneurs.
- Fostering interaction with residents by sharing local news, updates on development projects, and soliciting feedback on economic development initiatives.
- Utilizing social media ad platforms to reach specific demographics of potential investors and businesses based on location, industry, and interests.
- Visual storytelling: Using high-quality images and videos to showcase the City's natural beauty, vibrant culture, and quality of life.
- Live streaming: Hosting virtual events and Q&A sessions to connect with a wider audience.
- Collaborating with local influencers and industry leaders to amplify the Cape Coral's message and reach a broader audience.

Benefits of using social media for economic development:

- Reaching a larger pool of potential investors and businesses beyond geographic boundaries.
- Utilizing social media platforms for relatively low costs compared to traditional advertising methods.
- Engaging with stakeholders and responding to inquiries promptly.
- Controlling the narrative and presenting a positive image of the community.

Social Media – Strategic Approach

One of the most influential social media channels for business is **LinkedIn**. According to current data, LinkedIn reaches over **1 billion** users across the globe, making it a platform with a massive potential audience for professional networking and B2B marketing.

Articles and posts written by guest authors that feature current or planned developments in Cape Coral can have far-reaching impacts. Placement of these publications in membership groups in LinkedIn oriented toward the targeted industry clusters can expand the network and reach the key decision-makers who will begin to take more notice of Cape Coral's potential for their business.

Familiarization Tours

A familiarization tour, also known as a FAM trip, is a trip that industry professionals a first-hand experience of a destination. FAM tours should be conducted for each cluster with special events and hospitality services prepared to highlight the industry. Travel reimbursements should be arranged to provide adequate visitor experiences for the events. While many projects and recommendations developed in this study will not yet be realized, the City can provide marketing materials that will illustrate the new directions that the City is headed and how attraction of corporate interest would be accommodated.

FAM Tours – Strategic Approach

In Initiative 4.c.4, we recommend that the OEBD conduct FAM tours for executives of leading companies and corporate site selectors. The object of these tours is the showcasing of Cape Coral's potential. We suggest that the OEBD initially identify the top **3** industry clusters with the greatest interest by the City and focus these tours in those areas only. The FAM tours should have a theme oriented toward each cluster visit, with site packages and follow-up materials specifically designed to reinforce the cluster's fit for Cape Coral.

Appendices

Strategic Initiatives Descriptions

- Public Visioning Sessions for Cape Coral's Growth
- Committee of the Whole Public Access Website
- Citizen Advisory Committee for Public Input on Major Projects
- Benefit/Cost Analysis for Future Projects
- Compelling Narrative and Tagline about Cape Coral
- "Call to Arts" Program
- Events that Celebrate Both Big City and Small-Town Living
- Cape Coral's IT Infrastructure Promotion
- On Demand Water Mobility Transportation System
- 4-Quadrants Commission on Neighborhood Identity and Wayfinding
- Opportunity Multiplex Program
- Cape Coral Land Bank
- Strategic Site Assemblage Tax Credit
- One-Stop-Shop for Business Development
- Streamline the Permitting Process
- Cape Coral Executive Corps
- Vocational Training Silos for the Trades
- Working Group for Each Target Industry Cluster
- Target Industry Job Creation Grant
- Target Industry Prospectuses
- Industry Familiarization Tours
- Expansion of Online Learning Opportunities
- Cape Coral Startup Support Center
- Pop-Up Retail Fairs
- Consumer Spending Potential Reports
- Increase Activity and Access to Cape Coral's Waterfront

- Cape Coral Executive Airport
- Cape Coral Corporate Park
- Downtown Civic Center & Entertainment District
- Low Impact Storm Water Infrastructure Program
- Cape Coral FloodWatch Program
- Cape Blue Incentive
- Cape Coral Eco-Newsletter and Blog
- Solar Community Cooperative Task Force
- OEBD Elevation to Full Department Status
- Independent Economic Development Website
- Economic Impact analyses for all Capital Expense Projects
- Accredited Economic Development Organization Status

- Promote Experiential Tourism Product by Expanding Outdoor Activities
- Explore Opportunities to Work with Short-Term Rental Providers
- Further Develop the Already Existing Family Activity Cluster
- Further Develop Youth, Adult & Scholastic Sports Facilities
- Enhance & Develop New Visitor-Focused Events
- Support More Unique Local Dining Options & Enhanced Evening Activities
- Encourage Cross-Promotion and Joint Packaging Among Related Attractions
- Energize & Educate Locals About Tourism In Cape Coral
- Consider A Co-Op Marketing Approach with Certain Attractions
- Tourism Leadership & Collaboration / Partnerships
- Engage Higher Education Institutions as A Catalyst
- Designate To Be Responsible for Tourism

Public Visioning Sessions for Cape Coral's Growth (1.a.1)

Priority
LEVEL ONE (low resource demand)

Resources
PERSONNEL

Strategic Objective
Semi-annual visioning an ongoing schedule. These gatherings should be based on general discussions on what the City of Cape Coral should aspire to achieve in the future, possible directions for future planning, and comparisons with other communities nationwide that have experienced similar growth. Recommended location would be the two public libraries.

Budget
$10,000 annually for space rental, including production of hand-outs and provision of refreshments; **$15,000** annually for staff

Staffing Responsibility
OEBD

Strategic Timeline
Project mobilization:	**6** months
Progress Review:	end of year **2**
Operating completion:	end of year **5**

Committee of the Whole Public Access Website (1.a.2)

Priority

LEVEL ONE (low resource demand)

Resources

PERSONNEL

Strategic Objective

Creation of a new website for COW and Council projects reviews. The site should include downloadable graphics, videos, and PDFs of project summaries. Upgrades through Content Management System (CMS) to be conducted as needed.

Budget

$15,000 for graphic design and web management; **$10,000** annually for staff

Staffing Responsibility

OEBD, Information Technoligy Services

Strategic Timeline

Project mobilization (lag):	**6** months
Progress Review:	end of year 2
Operating completion:	end of year **5**

Citizen Advisory Committee for Public Input on Major Projects (1.a.3)

Priority
LEVEL ONE (low resource demand)

Resources
PERSONNEL

Strategic Objective
Establishment of a citizen's board to act as a representative panel to advise the City Council of public opinion on policy issues. The CAC would present the reports from the Visioning sessions, summarize public response to the COW website, and attend all COW and Council meetings.

Budget
$5,000 annually for production of reports, purchases of data, etc.; **$5,000** annually for staff

Staffing Responsibility
OEBD, City Manager's Office

Strategic Timeline

Project mobilization (lag):	**6** months
Progress Review:	end of year **2**
Supplemental Review:	end of year **5**
Operating completion:	end of year **10**

Benefit/Cost Analysis for Future Projects (1.a.4)

Priority

LEVEL ONE (low resource demand)

Resources

PERSONNEL

Strategic Objective

Benefit/Cost Analysis (BCA) is a method that determines the future benefits of a proposed project and compares those benefits to its costs. Social benefits can be measured by such metrics as reduced highway fatalities, avoided costs achieved through public policy, reduction in environmental impacts etc.

The BCA should be universally applied to all new project approvals, from both the public and the private sector. The result is a Benefit-Cost Ratio (BCR). A project is considered cost-effective when the BCR is **1.0** or greater. By setting a benchmark, Cape Coral can be assured that the outcomes are worth the risk taken.

Budget

$15,000 for training; **$15,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**6** months
Progress Review:	end of year **3**
Supplemental Review:	end of year **6**
Operating completion:	end of year **10**

Compelling Narrative and Tagline about Cape Coral (1.b.1)

Priority

LEVEL TWO (moderate resource demand)

Resources

FUNDS, PERSONNEL

Strategic Objective

Despite some local objections, Cape Coral is evolving into a third-tier city, with a population similar to Cleveland, Honolulu, or New Orleans. With a larger population come the benefits of big-city living – vitality, connectivity, income growth just to mention a few.

Cape Coral needs a new narrative. A major advertising or marketing firm should be retained to develop a new "story" for Cape Coral that is focused on the future. The narrative needs to illustrate how the recreation-oriented lifestyle of this Florida community offers an ideal match for self-starters and home-based entrepreneurs. The engagement should also produce a new tagline phrase for the City.

Budget

$150,000 annually for consultant; **$15,000** annually for staff

Staffing Responsibility

OEBD, Office of Communications, City Manager's Office

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **2**
Operating completion:	end of year **3**

"Call to Arts" Program (1.b.2)

Priority

NON-IMMEDIATE NEED (high resources demand)

Resources

FUNDS, PERSONNEL, TIME

Strategic Objective

A City-wide "Call to Arts" program to be created that will attract national or possibly international attention. Local artists should be encouraged to place murals, sculpture, windchimes, and more to help educate the public about urban growth and the sophistication that implies. The City needs to explore how the competing forces of dynamic growth and change are affected by climate and nature.   Given Cape Coral's location, the influence of water, wind, and the natural environment should be enough stimulus to inspire a group of artists to engage in creative commentary.

Installation of themed pieces in "discovery" locations throughout Cape Coral would be an engaging and delightful public amenity. A significant prize allowance for a large response should be entertained.

Budget

$3,000,000 over five years; **$10,000** annually for staff

Staffing Responsibility

OEBD, City Manager's Office

Strategic Timeline

Project mobilization (lag):	**24** months
Progress Review:	end of year **4**
Operating completion:	end of year **6**

Events that Celebrate Both Big City and Small-Town Living (1.b.3)

Priority

NON-IMMEDIATE NEED (moderate resources demand)

Resources

PERSONNEL, TIME

Strategic Objective

The dichotomy of big city life and small-town living is the dilemma Cape Coral presently finds itself. Cape Coral has several events that are held yearly which are successful and enjoyable, but there is always room for additions. We recommend an ambitious scheduling of events in different parts of the City that are focused on bringing residents and businesses together. Suggestions include:

- City-wide donation drive (school supplies, baby items non-perishable food, etc.).
- Black tie gala and silent auction (local business sponsorship)
- Charity concert (concert for a social cause)
- Cape Coral heritage celebration (“Waterfront Wonderland”, for example).
- Cultural food festival (different tastes, fusion, etc.)

Budget

$100,000 annually for advertising, rental spaces etc.; **$15,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Cape Coral's IT Infrastructure Promotion (2.a.1)

Priority

NON-IMMEDIATE NEED (moderate resources demand)

Resources

PERSONNEL, TIME

Strategic Objective

In partnership with Lee County, a robust fiber optic cable network is being installed throughout Cape Coral, bringing high-speed internet and cable television service to virtually all locations. As part of this investment, there is an opportunity to lease excess capacity or "dark" fiber to the business or academic community that will provide revenue back to the City. The connectivity advantage for business development is a strong driver.

We would recommend that the City promote its digital advantages as well as explore areas where data aggregation provided through IT infrastructure can best be used to make citizens' lives and business operations even more productive. Efforts should be undertaken to once again receive the Digital City award.

Budget

$25,000 for annual advertising

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

On Demand Water Mobility Transportation System (2.a.2)

Priority
LEVEL THREE (high resource demand)

Resources
FUNDS, PERSONNEL, TIME

Strategic Objective
While electric scooters, golf carts, bike-sharing and other wheel-based micromobility vehicles are becoming prevalent in major cities, we would like to propose a new mobility system tailored to Cape Coral: On-demand water mobility. Water taxi terminus locations at the ends of saltwater canals that are in proximity to major thoroughfares of Del Prado Blvd., Cape Coral Parkway, Veterans Parkway, or will serve the Bimini Basin should be considered. If parking areas at these ferry stops can be arranged, suitable property should be acquired. Alternatively, microtransit coordination between residential and ferry terminus locations could offer a unique transportation linkage system.

Budget
$10,000,000 allocated over **10** years; **$50,000** annually for staff

Staffing Responsibility
OEBD, Dept. of Public Works

Strategic Timeline
Project mobilization (lag):	**18** months
Progress Review:	end of year **4**
Operating completion:	end of year **7**

4-Quadrants Commission on Neighborhood Identity and Wayfinding (2.a.3)

Priority
LEVEL TWO (moderate resource demand)

Resources
PERSONNEL, TIME

Strategic Objective
The creation of an advisory 4-Quadrants Commission to study how wayfinding elements can be implemented throughout the City. This group should be made up of local merchants, active residents, and City personnel whose work or living experiences orient them more toward an individual quadrant.

Budget
$15,000 annually for artwork; **$10,000** annually for staff

Staffing Responsibility
OEBD

Strategic Timeline
Project mobilization (lag):	**12** months
Progress Review:	end of year **2**
Operating completion:	end of year **4**

Opportunity Multiplex Program (2.b.1)

Priority

LEVEL TWO (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

The Opportunity Multiplex Program is a methodology where higher density housing can be pre-permitted on assembled lots within Opportunity Zones. In the Level-One program, a two-story duplex is constructed on **2** combined lots. Each lot contains **4** allowed units, and a total of **8** units are produced. In the Level-Two program, **3** lots are combined to produce a triplex of **12** units. In the Level-Three program, **4** lots are combined into a quadraplex of **16** units. Pre-permitting will allow fast-tracking development for affordable housing.

Budget

$100,000 per year for added staff

Staffing Responsibility

OEBD, Developoment Services

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **3**
Supplemental Review:	end of year **5**
Operating completion:	end of year **10**

Priority

LEVEL THREE (high resource demand)

Resources

FUNDS, PERSONNEL, TIME

Strategic Objective

Cape Coral Land Bank (CCLB) will operate in cooperation with the City as a non-profit Public-Private Partnership (P3), with the objective of acquiring and holding prime vacant properties for transferring, reselling, or reinvesting in areas where the City would like to achieve economic development outcomes. The CCLB should be able to offer incentivized property swaps to current residents such as two-for one lot transfers or above market purchase allowances to encourage existing property owners to participate in deals that ultimately are dedicated to public good. Above all else, the core mission of the Cape Coral Land Bank must be the exercise of its responsibility to achieve positive economic development results for the City.

Budget

$20,000,000 in seed funding over **4** years

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Public Investment limit:	end of year **5**

Strategic Site Assemblage Tax Credit (2.b.3)

Priority
LEVEL THREE (high resource demand)

Resources
FUNDS, PERSONNEL, TIME

Strategic Objective
The Strategic Site Assemblage Impact Fee Tax Credit will defer impact fees for road and utility capital expenses on sites that assemble at least three pre-platted housing lots for development of affordable housing. For commercial properties, the program will engage if assemblage of at least two commercial lots or an assemblage of a **50%** increased lot area accomplished by a mix of commercial or residential lots A requirement for this incentive application in business use would be the application toward at least one the of the targeted industry clusters.

Budget
$10,000,000 seed funding over **5** years

Staffing Responsibility
OEBD

Strategic Timeline
Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Priority

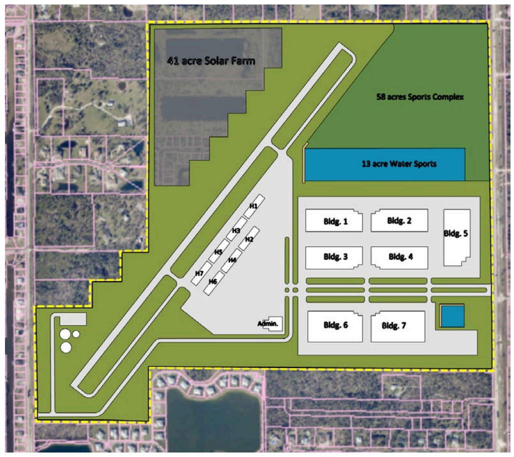
NON-IMMEDIATE NEED (high resource demand)

Resources

FUNDS, PERSONNEL, TIME

Strategic Objective

Development of an executive airport with accompanying industrial park, recreation fields, and a solar farm on a City-owned parcel with eminent domain acquisition of surround properties. The City would develop the land, provide airport runway, hangars, tie-down areas , and administration building, plus utility and road infrastructure to support an industrial park built by others. A series of recreation fields and a large solar farm would also be constructed with public money.



Budget

$81.4 million investment; **$250,000** per year for staff

Staffing Responsibility

OEBD, Public Works

Strategic Timeline

Project mobilization (lag):	**24** months
Progress Review:	end of year **4**
Public Investment limit:	end of year **10**

Cape Coral Corporate Park (2.c.2)

Priority
NON-IMMEDIATE NEED (high resource demand)

Resources
FUNDS, PERSONNEL, TIME

Strategic Objective
Development of a business park on City-owned land. The property's is high degree of wetland and protected vegetative areas requires a careful clustering of buildings that still allow the natural environment to survive is the correct approach. The City will subdivide the property and construct roads and utilities to serve several Class A office buildings, high cube warehouses, and flex industrial buildings to be built by others.

Budget
$54.2 million investment; **$150,000** per year for staff

Staffing Responsibility
OEBD, Public Works

Strategic Timeline
Project mobilization (lag):	**36** months
Progress Review:	end of year **5**
Public Investment limit:	end of year **10**

Priority

NON-IMMEDIATE NEED (high resource demand)

Resources

FUNDS, PERSONNEL, TIME

Strategic Objective

The development of a new multi-function Civic Center to be constructed on a visibly dominant downtown site that will serve as a landmark for visitors and residents alike in the CRA. In support of the Civic Center, a new waterfront Entertainment District to be developed along Cape Coral Pkwy, and the Norfolk Canal. A north and South Riverwalk-style esplanade containing shops, restaurants, and bars would add the missing tourism destination that Cape Coral is needing.

Budget

$116.4 million investment; **$400,000** per year for staff

Staffing Responsibility

OEBD, Public Works, City Mamagers Office

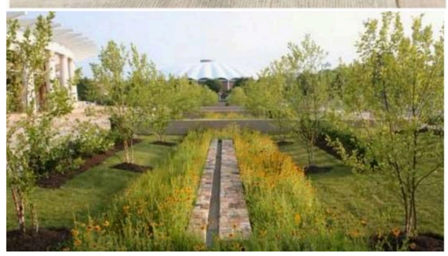
Strategic Timeline

Project mobilization (lag):	**48** months
Progress Review:	end of year **6**
Public Investment limit:	end of year **10**

Low Impact Storm Water Infrastructure Program (3.a.1)

Priority
LEVEL THREE (high resource demand)

Resources
FUNDS, PERSONNEL, TIME



Strategic Objective
Low Impact Development (LID). LID is a management approach that can reduce runoff and pollutant loadings as close to its source as possible. The program will cover prototype development of bioretention, rain harvesting, and permeable pavement technues for wide-spread application.

Budget
$2,000,000 for prototypes; **$500,000** for annually for implementation, staff

Staffing Responsibility
OEBD, Public Works

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Supplemental Review:	end of year **6**
Operating completion:	end of year **10**

Cape Coral FloodWatch Program (3.a.2)

Priority

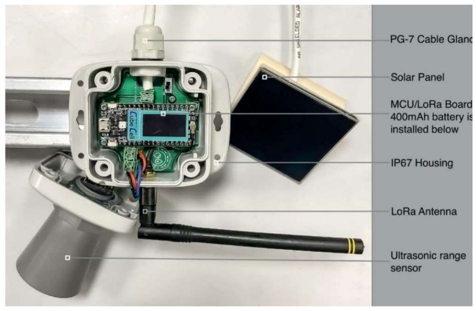
LEVEL THREE (high resource demand)

Resources

FUNDS, PERSONNEL, TIME

Strategic Objective

City's Utilities and Public Works departments will be engaged to install Real-time IoT sensors that monitor street flooding and other resiliency information that can be integrated with Cape Coral's 3-1-1 network. The FloodNet technology is open-sourced and free to use.



Budget

$2,000,000 for sensors & network; **$100,000** annually for staff

Staffing Responsibility

Utilities, Public Works, Information Technology Services

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Supplemental Review:	end of year **6**
Operating completion:	end of year **10**

Cape Blue Incentive (3.a.3)

Priority

LEVEL THREE (high resource demand)

Resources

FUNDS, PERSONNEL, TIME

Strategic Objective

Cape Blue incentive will specifically promote water saving and storm water runoff control through bio-retention measures such as rain gardens, rainwater harvesting, stormwater gardens, tree boxes, xeriscaping, and permeable pavement. This is a **5**-year incentive that will provide a cash grant at two levels:

- Level One: **25%** reduction in water use OR **25%** stormwater run-off mitigation
- Level Two: **50%** reduction in water use OR **50%** stormwater run-off mitigation

Budget

$3,000,000 in seed funding; **$50,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Cape Coral Eco-Newsletter and Blog (3.b.1)

Priority

NON-IMMEDIATE NEED (low resource demand)

Resources

PERSONNEL

Strategic Objective

Monthly Cape Coral Eco-Newsletter that can be circulated both in print and online that discusses the roles of environmental stewards, the interaction of native plants with the built environment, energy sustainability, storm water mitigation, and other topics germane to the environment. A running blog post should accompany the online version of the newsletter.

Budget

$25,000 per year for publication and staff costs

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **2**
Operating completion:	end of year **5**

Solar Community Cooperative Task Force (3.b.2)

Priority

NON-IMMEDIATE NEED (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

Solar Community Cooperative Task Force to be created to study where solar farms of varying sizes can be deployed throughout the City and how local community areas can directly benefit by becoming solar cooperatives.

Budget

$10,000 annually for meetings, publications, etc.; **$10,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **4**

OEBD Elevation to Full Department Status (4.a.1)

Priority

LEVEL THREE (high resource demand)

Resources

FUNDS, PERSONNEL, TIME

Strategic Objective

Elevation of the OEBD to full department status, with some use of the General Fund to be allocated for the development of incentive packages, enhanced marketing programs, speculative development of catalyst projects, and increased staff. Additionally move the CRA under OEBD in the new department.

Budget

$2,500,000 annually in GF funding; **$300,000** annually for additional staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **2**
Operating completion:	end of year **4**

Independent Economic Development Website (4.a.2)

Priority
LEVEL ONE (low resource demand)

Resources
PERSONNEL

Strategic Objective
Creation of a new website for the OEBD independent of the City's website structure. "SiteFinders" utility and updated demographic and business data required on continuing schedule through Content Management System (CMS).

Budget
$50,000 for graphic design and web management; **$15,000** annually for CMS,staff

Staffing Responsibility
OEBD

Strategic Timeline

Project mobilization (lag):	**6** months
Progress Review:	end of year **2**
Supplmental Review:	end of year **6**
Operating completion:	end of year **10**

Priority

LEVEL ONE (low resource demand)

Resources

PERSONNEL

Strategic Objective

The role of the OEBD should be one of mediator for capital expense outlays, helping to demonstrate the viability of anticipated spending in view of strategic directions the City is planning to navigate in the future. Judicious use of EIAs can be quite beneficial in helping to chart that course. A representative of the OEBD to be educated on the use of IMPLAN EIA software and that an annual subscription be purchased for use by the City for ongoing EIA analyses.

Budget

$20,000 for IMPLAN training; **$3,500** annual data costs plus **$30,000** staff costs

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**6** months
Progress Review:	end of year **2**
Supplmental Review:	end of year **6**
Operating completion:	end of year **10**

Accredited Economic Development Organization Status (4.a.4)

Priority

NON-IMMEDIATE NEED (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

The International Council of Economic Developers (IEDC) is the premier US membership group of Economic Development Organizations (EDOs). The OEBD to apply for certification Accredited Economic Development Organization (AEDO). A self-examination by the OEBD to determine what milestones might be needed to be reached to achieve AEDO confirmation.

Budget

$25,000 annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **4**

One-Stop-Shop for Business Development (4.a.5)

Priority

LEVEL TWO (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

The City of Cape Coral to create a One-Stop Shop for Business Development that would have mostly virtual self-services, minimal staff, printed materials for take-home, and an accompanying on-line presence. The facility to be would be administrated by the OEBD which would coordinate its activities with other departments.

Budget

$1,000,000 in seed funding; **$150,000** annually for rent, publications, staff costs

Staffing Responsibility

OEBD, Development Services, Information technology Service

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **3**
Supplemental Review:	end of year **6**
Operating completion:	end of year **10**

Streamline the Permitting Process (4.b.1)

Priority

LEVEL TWO (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

Retaining of an independent efficiency expert who can pinpoint bottlenecks in the permitting process and recommend improvement in operations. Additionally, a downloadable database of properties that will provide type of permits needed, the links to those applications from Development Services, and an approximation of the time required to obtain approvals if the intended use is executed. This could be a coordination between the new OEBD website and the One-Stop-Shop.

Budget

$250,000 for consultant; **$15,000** annually for database management

Staffing Responsibility

OEBD, Development Services

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **2**
Operating completion:	end of year **4**

Cape Coral Executive Corps (4.b.2)

Priority

LEVEL TWO (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

A corps of knowledgeable business leaders would undergo basic teaching training by the Cape Coral Technical College and then be paid by the City for lectures or seminars that they conduct. A survey of current residents to be conducted to ascertain the numbers and experience level of volunteers who would participate. The OEBD should create a plaque or award program to honor those individuals who will participate.

Budget

$500,000 in seed funding; **$75,000** per year annually for stipends, awards, misc. costs

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Vocational Training Silos for the Trades (4.b.3)

Priority

NON-IMMEDIATE NEED (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

From an Employer Survey conducted online, the mixed picture of training being a need for businesses probably indicates that businesses are unaware of training opportunities. When asked if partnerships with local educational institutions would be important, an overwhelming **61%** said that such alliances could be valuable.

The OEBD will retain an outside consultant to canvas industry roundtables attendees and employer survey responders regarding their training needs. The results of this analysis will be furnished to the educational community to determine in vertical silos are being provided for new hires to be ready for employment, especially in the trades.

Budget

$25,000 for consultant survey and report preparation costs; **$10,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **4**

Working Group for Each Target Industry Cluster (4.c.1)

Priority

LEVEL TWO (moderate resource demand)

Resources

FUNDS, PERSONNEL

Strategic Objective

The formation of working groups for each of the **8** targeted industry clusters. Each group consists of a representative from OEBD and the City Manager/s office, plus at least **3** industry leaders from the Cape Coral business community. Marketing of each cluster to be funded, plus consultation with public relations firm on the types of campaigns needed for each cluster to successfully move forward.

Budget

$150,000 initial funds, plus **$50,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Target Industry Job Creation Grant (4.c.2)

Priority

LEVEL THREE (high resource demand)

Resources

FUNDS, PERSONNEL, TIME

Strategic Objective

The Target Industry Job Creation Grant will be a performance-based incentive with multiple tiers of cash awards. The incentives would be paid to employers who can demonstrate sustainability of employment and achievement of promised hiring goals. The cash award would be paid in a three-year installment after submittal by the grantor that employment and compensation levels were met.

Budget

$450,000 initial funding; **$50,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Public Investment:	end of year **5**

Target Industry Prospectuses (4.c.3)

Priority

LEVEL TWO (moderate resource demand)

Resources

FUNDS, PERSONNEL

Strategic Objective

Marketing reports for each of the **8** targeted industry clusters should be prepared that illustrate why Cape Coral is a good "fit" for technology companies. The industry prospectuses presented in Volume 1 of this report are a good start but more needs to be done. Results of the Working Groups consultation will determine contents of each prospectus. Data developed during this study to be updated periodically. The materials should also feature available incentives and the ongoing efforts of The Course Ahead to facilitate development.

Budget

$150,000 initial funding; **$25,000** annually for updates and staff costs

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Industry Familiarization Tours (4.c.4)

Priority

NON-IMMEDIATE NEED (moderate resource demand)

Resources

FUNDS, PERSONNEL

Strategic Objective

As part of a marketing and promotional strategy of the new targeted industry clusters the OEBD will conduct Industry familiarization (FAM) tours for executives of leading companies and corporate site selectors. The City will provide marketing materials that will illustrate the new directions that Cape Coral is headed and how attraction of corporate interest would be accommodated.

FAM tours should be conducted for each cluster with special events and hospitality services prepared to highlight the industry. Travel reimbursements should be arranged to provide adequate visitor experiences for the events.

Budget

$200,000 for initial tours; **$10,000** annually for follow up, materials production, contact, etc.; **$20,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **4**

Expansion of Online Learning Opportunities (4.d.1)

Priority

LEVEL TWO (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

Promote online learning as a cost-effective and reasonable alternative to expensive college education for working families. The OEBD should continue coordination with local higher education institutions in the area to expand course offerings in the shortfall curriculums so that a work-ready labor force can be utilized to successfully support the targeted industries and clusters.

Budget

$50,000 advertising; **$10,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **4**
Operating completion:	end of year **7**

Cape Coral Startup Support Center (4.d.2)

Priority

LEVEL THREE (high resource demand)

Resources

FUNDS, PERSONNEL, TIME

Strategic Objective

The Cape Coral Startup Support Center will operate as a hybrid incubator and accelerator program. While the incubator component focuses on refining startup ideas and providing a supportive environment, the accelerator component will offer more structured, intensive programs to turn startups into scalable businesses. A suitable commercial space should be obtained for use and the program should be formed as a public-private-partnership between the OEBD and angel investors or venture capitalists. The objective will be the formation of new companies in the targeted clusters.

Budget

$5,000,000 in seed funding; **$100,000** annually for rent, staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Supplemenatl Review:	end of year **6**
Public Investment:	end of year **8**

Pop-Up Retail Fairs (5.a.1)

Priority

LEVEL TWO (moderate resource demand)

Resources

FUNDS, PERSONNEL

Strategic Objective

The City should consider use of "pop-up" retail events, retail fairs, and other venues to encourage chain retailers to examine Cape Coral's large buying public and recognize the revenue possibilities created by fulfilling the unmet desires of this growing population. The integration of entertainment or dining with retail should be promoted a way of enhancing the retail experience.

Budget

$75,000 annually for advertising, flyer printing, etc. **$10,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **2**
Operating completion:	end of year **4**

Consumer Spending Potentials Reports (5.a.2)

Priority

LEVEL ONE (low resource demand)

Resources

PERSONNEL

Strategic Objective

From this study, a significant amount of data on the retail, food services, and hospitality industries have been examined. Where and to what degree shoppers in Cape Coral spend in local establishments can be partially tracked through AI-assisted leakage analysis. However, the effect of e-commerce continues to hamper irrational gap-leakage analyses.

We recommend that a Consumer Spending Potential report be produced from these available data sources that can used in marketing Cape Coral to prospective retailers and hospitality vendors. The report can be assembled into sections that have applicability to individual industries.

Budget

$15,000 per year for publishing, **$25,000** annually updates and staff costs

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**6** months
Progress Review:	end of year **2**
Operating completion:	end of year **5**

Increase Activity and Access to Cape Coral's Waterfront (5.b.1)

Priority

NON-IMMEDIATE NEED (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

The City to identify, attract, and work with private sector operators who can provide shoreline attractions, restaurants, etc. and activities such as themed boat tours, fishing, sailing lessons, jet skiing, specialty boats, kayaks, canoes, etc.

Budget

$50,000 annually for staff costs

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Promote Experiential Tourism Product by Expanding Outdoor Activities (5.b.2)

Priority
NON-IMMEDIATE NEED (moderate resource demand)

Resources
PERSONNEL, TIME

Strategic Objective
The City should work with the vacation rental community and hotels to identify, develop, and promote visitor experiences such as: outdoor and water adventure activities (zip lines, boating, etc.), Food and drink (interactive experiences at restaurants and brew masters), and Arts and culture programming (opportunities to meet artists, tour cultural and historic locations).

Budget
$15,000 annually for staff

Staffing Responsibility
OEBD

Strategic Timeline
Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **4**

Explore Opportunities to Work with Short-Term Rental Providers (5.b.3)

Priority

LEVEL ONE (low resource demand)

Resources

PERSONNEL

Strategic Objective

The City is to develop partnership with the various rental platform sites to help with acquiring new listings and joint promotions. Partner with the Ft. Myers VCB, nonprofit, or universities to educate the destination's current and potential hosts to provide a better experience for the visitors and better manage their businesses to be more profitable. Promote Cape Coral as a desirable and remote-worker friendly destination for short-term stays that tie into tourism and leisure activities.

Budget

$15,000 annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**6** months
Progress Review:	end of year **2**
Operating completion:	end of year **5**

Further Develop the Already Existing Family Activity Cluster (5.b.4)

Priority

NON-IMMEDIATE NEED (low resource demand)

Resources

PERSONNEL

Strategic Objective

The City is to engage a six-step program:

(1) Bring the current attractions together to obtain ideas as to how they can work together to better deliver a coordinated product, determine what else should be added to the mix, and how to better market and brand the family activity cluster.
(2) Identify additional family related activities such as disc golf, laser tag, golf driving range, and indoor gaming arcade with ax throwing, climbing walls, etc.
(3) Identify supporting infrastructure, such as restaurants and retail.
(4) Find interested developers to build the attractions and infrastructure.
(5) Help those developers achieve their objectives.
(6) Actively market this family friendly activity cluster.

Budget

$15,000 for advertising; **$25,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **2**
Operating completion:	end of year **4**

Further Develop Youth, Adult & Scholastic Sports Facilities (5.b.5)

Priority
LEVEL THREE (high resource demand)

Resources
FUNDS, PERSONNEL, TIME

Strategic Objective
The City is to upgrade the current sports fields and build new ones to support sports tourism. This will entail working together with the Athletic Division to develop Pickleball competitions at the new Racquet Facility and making the sports tourism visitors aware of Cape Coral's strong food scene.

Budget
$500,000 initial funding; **$50,000** annually for upgrades; **$30,000** annually for staff

Staffing Responsibility
OEBD, Athletic Division

Strategic Timeline
Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **6**

Enhance & Develop New Visitor-Focused Events (5.b.6)

Priority

LEVEL TWO (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

The City to stimulate and act as a catalyst to create new events that will attract tourists. Develop a committee that will review the current schedule with the objective of finding ways to enhance or create new events and festivals. Concentrate on those assets that are unique or particularly strong in Cape Coral.

Budget

$50,000 annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **2**
Operating completion:	end of year **4**

Support More Unique Local Dining Options & Enhanced Evening Activities (5.b.7)

Priority

LEVEL TWO (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

The City will identify ways to further develop infrastructure in the "food" zones and recruit restaurant operators to open unique concepts and differing cuisines in concentrated areas. Ssupport the growth of small food businesses that expand dining option in the City and communicate with local universities to investigate their interest in a culinary school.

Budget

$25,000 annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Encourage Cross-Promotion & Joint Packaging Among Related Attractions (5.b.8)

Priority

LEVEL TWO (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

The OEBD will serve as a formal and informal convener and facilitator of partnership conversation among related attractions. These partnerships could be incentivized by promotional opportunities offered by the City or VCB. The City to create "Cape Coral Pass" that leverages partnerships between attractions, transportation services, hotels, and dining establishments to create value-packed deals that encourage tourists to explore more of what the destination has to offer.

Budget

$100,000 seed funding form incentives and publications; **$30,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **2**
Operating completion:	end of year **4**

Energize & Educate Locals About Tourism In Cape Coral (5.b.9)

Priority

NON-IMMEDIATE NEED (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

The City to promote tourist attractions and engage an overall plan to targeted locals. Host annual one-day tourism summits for key leaders and stakeholders with speakers highlighting tourism assets and potential tourism development activities. Provide space at the tourism summit for individual attractions to have booths to promote themselves.

Budget

$25,000 initial funding; **$10,000** annually for follow-ups; **$15,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Consider a Co-Op Marketing Approach with Certain Attractions (5.b.10)

Priority

LEVEL ONE (low resource demand)

Resources

PERSONNEL

Strategic Objective

Co-op marketing allows attractions to access high-value placements that they would struggle to achieve with their own resources. It is important to ensure that Cape Coral organizations take greater advantage of this program and find new ways to stretch their marketing dollars and test new/emerging tactics. The City is to develop a list of attractions and businesses to target for joining co-op marketing opportunities.

Budget

$35,000 annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**6** months
Progress Review:	end of year **2**
Operating completion:	end of year **4**

Tourism Leadership & Collaboration / Partnerships (5.b.11)

Priority

LEVEL TWO (moderate resource demand)

Resources

PERSONNEL, TIME

Strategic Objective

The City is to contact local leaders with a knowledge of tourism and hospitality need to be about taking an active role in leading the charge to improve the tourism environment in Cape Coral. In addition, coordination meetings with planned agendas are needed among the potential partner organizations. These collaborations and partnerships should facilitate the greater sharing of resources such as video, photography, and written content on City experiences and amenities.

Budget

$50,000 initial funding for meetings; **$50,000** annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Engage Higher Education Institutions as a Catalyst (5.b.12)

Priority
NON-IMMEDIATE NEED (moderate resource demand)

Resources
PERSONNEL, TIME

Strategic Objective
The City to engage relevant individuals at the various institutions of higher education on potential areas for partnership. These include organizational and board participation, placemaking advocacy within Lee County and City economic development efforts. Universities may be interested partners in efforts to create workforce development pipelines that help address workforce gaps in the tourism industry and providing research and expertise through professors and internship programs.

Budget
$25,000 annually for staff

Staffing Responsibility
OEBD

Strategic Timeline
Project mobilization (lag):	**18** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

Designate An Individual to be Responsible for Tourism (5.b.13)

Priority

LEVEL TWO (moderate resource demand)

Resources

FUNDS, PERSONNEL

Strategic Objective

The City is to assign tourism responsibility to the appropriate person who is already on staff. It should then find one or two interns to assist this person. Over time, the City is to review the current and expected future amount of tourism related work by the individual from the City Manager's office and the interns, and the return on investment from having the tourism person on staff to determine what resources are needed.

Budget

$50,000 annually for staff

Staffing Responsibility

OEBD

Strategic Timeline

Project mobilization (lag):	**12** months
Progress Review:	end of year **3**
Operating completion:	end of year **5**

THE COURSE AHEAD

CAPE CORAL ECONOMIC DEVELOPMENT STRATEGIC PLAN

VOLUME 2 - STRATEGY

Cape Coral Economic Development Strategic Plan

December 2024

Economic Development Strategic Plan - RCM2342AS

Volume 3 Technical Report

prepared for:

City of Cape Coral Office of Economic and Business Development.

Cape Coral City Hall
1015 Cultural Park Blvd., 2nd Fl.
Cape Coral, FL 33990

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December 2024

Acknowledgments

The Cape Coral Economic Development Strategic Plan is a comprehensive roadmap for achieving success in a uniquely challenging environment. Creation of the Strategy is not accomplished in a vacuum – there are many people and organizations that have provided valuable input to the process.

Our project team has been guided by the dedicated leadership of the Office of Economic and Business Development, the City Manager's Office, Development Services, Public Works, Communications, Information Technology Services, the Chamber of Commerce, the Lee County Visitor and Convention Bureau, and more.

We would like to thank Mayor Gunter, the City Council, and the especially the residents and businesses of Cape Coral, without whose unbiased and informative opinions and recommendations this work would not be possible.

Project Team

DCG Corplan Consulting LLC
Bruce M. Hoch, Managing Director

Parter International, Inc.
Alan Parter, President

Forgey Planning
Max Forgey, Principal

D-H & Associates, LLC
John Dolan-Heitlinger, President & CEO

Contents

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Economic Development Strategic Plan - RCM2342AS

Task 1 Report

prepared for:

City of Cape Coral – Office of Economic and Business Development
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November 14, 2023

Table of Contents

Task 1: Project Kick Off/Facilitation of the Vision

1.a – Project Kick-off/Project Management

Project Management

In preparation for the Kick-Off meeting, the DCG Corplan Team obtained background reports developed by the City, outside consultants, Lee County representatives, and others. These reports are as follows:

- Cape Compass 2030 Strategic Plan
- Urban Land Institute Advisory Services Panel - Cape Coral
- National Community Survey – Cape Coral – 2021
- CRA Redevelopment Plan – 2019
- Cape Coral Comprehensive Plan – Economic Development Element
- Economic & Business Development Office Quarterly Report – Q3 2023
- Cape Coral Bridge Project

While in Cape Coral prior to the Kick-Off Meeting, the DCG Corplan Team Project Manager attended a ResilientLee Task Force meeting. Other related meetings included the after-hours business function with the Chamber of Commerce and a Marine Industry conference.

A Project Review Committee was organized by the Economic and Business Development Office. City and Lee County members of the Committee are:

- T. Sharon Woodberry, Economic Development Officer
- Matt Grambow, Special Projects Coordinator – City Manager's Office
- Laura Dodd, Principal Transportation Planner – Public Works
- Chad Boyko, Principal Planner – Development Services – Public Works
- Amy Yearsley, City Planning Manager – Development Services
- Bill Corbett, Design and Construction Manager - Capital Projects
- Melissa Mickey, Communications Manager - City Manager's Office
- Pamela Johnson, Deputy Director, Lee County Visitor & Convention Bureau
- Claudia Arguelles-Miller - Economic Development

An email-contact group of the above persons together with the DCG Corplan Team members was established to efficiently disseminate project information. Video conferences for progress reports will be an ongoing mechanism for participation by the Review Committee.

The project was officially commenced on July 17, 2023 through issuance of an emailed Notice to Proceed authored by T. Sharon Woodberry, Economic Development Officer

Kick-Off Meeting

Due to vacation schedules, an agreed date for the Kick-Off Meeting was establish as August 17, 2023. Attendees, either in-person or virtual, were as follows:

- Bruce Hoch - DCG Corplan Consulting LLC
- Max Forgey - Forgey Planning
- Alan Parter - Parter International, Inc.
- John Dolan-Heitlinger - D-H & Associates Consulting, LLC
- Rob DeRocker - Rob DeRocker & Assoc.
- Michael Ilczyszyn - City of Cape Coral - Interim City Manager
- Kimberly Bruns - City of Cape Coral - City Clerk
- Maureen Buice - City of Cape Coral - City Manager's Office
- Connie Barron - City of Cape Coral - City Manager's Office
- Matt Grambow - City of Cape Coral - City Manager's Office - Special Projects
- Tom Slaughter -City of Cape Coral - Community Redevelopment Agency
- Vince Cautero - City of Cape Coral - Development Services
- Chad Boyko - City of Cape Coral - Development Services - City Planning Division
- Mark Mason - City of Cape Coral - Financial Services
- Crystal Feast - City of Cape Coral - Financial Services
- Ryan Lamb - City of Cape Coral - Fire- ER Services
- Michelle Hoffman - City of Cape Coral - Information Technology Services
- Persides Zambrano - City of Cape Coral - Public Works
- Bill Corbett - City of Cape Coral - Public Works - Design and Construction
- Laura Dodd - City of Cape Coral - Public Works - Transportation Division
- Jeff Pearson - City of Cape Coral - Utilities
- Paul Clinghan - City of Cape Coral - Office of Capital Improvement
- T. Sharon Woodberry - City of Cape Coral - - Office of Economic & Business Development
- Pamela Johnson - Lee Country - Convention & Visitors Bureau

Key takeaways from the meeting were that Cape Coral is now the size of Salt Lake City in population and could reach that of Tampa in the next few years. In order to be sustainable in the future, the economy needs to grow in sync with the population. Jobs and commercial investment are vital building blocks, but understanding and navigating roadblocks or pitfalls are essential.

The various department heads of City agencies in attendance were engaged and promised active participation in the process. (For notes for the Kick-Off Meeting, refer to the Task 1 Report Appendices).

1.b – Project Website

The DCG Corplan team prepared a project website as a landing pad for project information. A main overview page is supported by individual pages for each of the twelve project tasks. A progress chart graphically depicts tasks completion to date. The site is continually updated when new information is updated. The Review Committee will be alerted when major new updates occur.

The address for the website is: **https://capecoraledsp-work.com/**

DCG Corplan has requested that the site be considered as confidential at present. However, as activities are finalized, a more graphically-pleasing website will be designed for public viewing that will summarize key data points for presentation.

1.c. – Public Survey and Stakeholder Interviews

Public Survey

Obtaining public input is vital for economic development plans, so a Public Survey was designed to engage Cape Coral residents. SurveyMonkey.com was retained to host the online survey, with a series of brief questions devised through the input from the Review Committee. Ten questions were posed; nine were multiple-choice, the tenth was an essay-type. With help from the City, multiple announcements and advertisements were presented to the public including social media and a Q-R code. The survey was published on September 8, 2023 and closed on October 13, 2023.

DCG Corplan anticipated a return of approximately 2,000 responses or about 1% of the City's population. In total, 1,841 surveys were received. A summary of the questions and answers are as follows (for detailed information on the Public Survey, refer to the Task 1 Report Appendices):

Q1: How long have you been a resident of Cape Coral, Florida?
Leading response: **Five Years**

Q2: Which aspects of infrastructure do you think are most crucial for economic development in our area? Rank by priority of investment.
Leading responses: **Utilities, Multimodal Roadway, Stormwater Management**

Q3: Looking to the future, which areas should Cape Coral prioritize for development over the next decade? (Select up to three):
Leading responses: **Business & Commerce, Healthcare Facilities, Education & Schools**

Q4: How would you rate the effectiveness of local government in addressing community concerns?
Leading response: **Not Very Effective**

Q5:. At present, the City of Cape Coral has only one college. What forms of higher education do you think the city currently lacks? (Select any that apply):
Leading responses: **Technical/Vocational Training, Community Colleges**

Q6: How would you rate the employment opportunities in Cape Coral?
Leading response: **Fair**

Q7: What is your opinion about the current state of tourism and its impact on Cape Coral?
Leading response: **It is good, but there are some negative impacts that should be managed**

Q8: Are you in favor of more downtown development projects in Cape Coral?
Leading response: **Strongly in Favor**

Q9: In the future, what would you like to see more of in Cape Coral? (Select up to three):
Leading responses: **Linear Parks & Streetscape Beautification, Outdoor Recreation Opportunities, Cultural Events**

Q10: Please provide any additional comments or concerns you may have about Cape Coral and its future direction. Feel free to explain any of your answers to the questions above.
1,248 written comments were received and the major themes were as follows:
-- Desire for more greenspace throughout the City
-- Completion of parks started though GoBond funding
-- Rejection of the Jaycee Park plan
-- More outdoor recreation activity opportunities
-- Full restoration of the Yacht Club beach
-- Tourist attraction based on water use

-- Installation of shade trees and planted medians
-- Installation of sidewalks in residential neighborhoods
-- Better policing of traffic violators
-- Better controls on vehicle storage and general cleanliness of properties
-- Improved traffic control, stoplights, street widening – to handle ever increasing congestion
-- Better connectivity to I-75
-- Clean-up of canals
-- Sensitivity for eco-systems sustainability, including Redfish Point development
-- Limitation on rental apartment construction
-- More cohesive zoning and planning
-- Improvement of building facades in downtown
-- Infrastructure improvements, including burying of electrical and telecommunication cabling
-- Higher-paying business attraction
-- Commercial/office development in the north area
-- Attraction of a second hospital/health care provider
-- More efficient permitting processes
-- Tax reduction
-- Responsiveness from municipal government to citizens' needs

Stakeholder Interviews

It was determined that input from some leading companies could help shape the vision for Cape Coral in the coming years. Stakeholders were invited to participate in telephone interviews with the proviso that their direct comments would not be shared with the public. Seven stakeholders were interviewed in October 2023. The schedule of stakeholder calls and the summary of their comment are listed below:

- James Sommers, RE/Max - Realtor, Residential (10/5/2023)
- Joseph Bonara, Catalyst Development - RE Developer (10/9/2023)
- Charles Pease, Cape Coral Technical College - Educator (10/9/2023)
- Annette Barbaccia, Miloff Aubuchon Realty Group - Realtor, Commercial (10/11/2023)
- Donna Shuman Germain, Cape Coral Chamber of Commerce - Business Leader (10/16/2023)
- Henrik Margard, Nor-Tech Boats - Manufacturer (10/16/2023)
- Larry Nygard, Crown Development - RE Developer (10/17/2023)

Interviews Summary

- Businesses are largely unhappy with civic leaders
- Permitting process time are too long, personnel attitudes are poor

- City needs to learn about benefits of fast-tracking, Public-Private-Partnerships (P3)
- Years 2021 & 2022 were the City's highest growth years
- Current lending climate due to inflation and interest rates are slowing investment
- Labor supply is limited, and not often qualified
- Educational system opportunity: Marine tech, Welders, Automotive, HVAC, Nursing, CNC production specialists, Transportation, Logistics
- New residents are: typically 25 to 34 year old starters; or, 59-75 year old retirees
- Demand for rental seems to overshadow ownership
- Public awareness training needed on issues of environmental sustainability, preservation of native plant species, etc.
- A city of 400,000 needs:
  -- Mixed-use housing development to attract younger residents
  -- Affordable workers housing
  -- Downtown development through site assemblage
  -- Tech Center to house new tech startups companies
  -- Business incubator
  -- More hospital space

1.d – Facilitation of the Vision

The Vision for Cape Coral's future should be a long-term aspirational goal with a direct and inspiring message. In the supplementary Mission statement, the means of achieving the vision is more practical and short-term.

The Cape Compass Vision and Mission Statements indicates that the city "*will thoughtfully grow into a vibrant and inclusive community that encourages residential character, creates economic opportunity, and ensures respect for its unique environment*"[1]. The mission will be to provide services and resources that enhance the quality of life for those who live, learn, work, and play in Cape Coral.

We began the crafting of the Vision and Mission statements through the review of preceding reports and studies. This will be a continuing effort requiring multiple iterations before finalization. The overarching themes for this effort will be Adaptability and Resiliency. Recognizing Cape Coral's physical limitations is obvious, with only a few mentioned below:

- Large number of canals and difficulty of movement throughout the city

[1] Cape Compass 2030 Strategic Plan

- Low density sprawl and absence of high-rise urban core
- Lack of direct interstate highway access
- Potential for on-going cataclysmic weather events

Adaptability

How strengths and potentials can overcome drawbacks is the key. We will explore SWOT in later tasks, but an early appreciation of this process is warranted at this early juncture. For now, we will consider the following as strengths to be leveraged:

- Considerable population size with expected growth in near term
- Decreasing median age indicating younger family influx
- Recreational water-oriented city theme
- Affordable living opportunities
- Low crime rate
- Abundant natural and recreational amenities

Resiliency

With the influx of in-migrants to Southwest Florida, the sudden and shocking revelation of hurricane impacts must be daunting to new residents. There is no other state in the US that is more adept at storm recovery than Florida, but hurricanes are getting bigger and will result in more damage. With the City's near sea-level character and the proliferation of canals, the reality of storm surge and flooding will remain a significant factor.

The City of Cape Coral cannot afford to tackle climate change on its own, but what it can do is constantly balance development planning with the cost of severe weather realities. We will work with the City and stakeholders to develop a vision that is achievable and grounded in the financial and social benefit capabilities of Cape Coral.

1.e – Task 1 Progress Report/video conference

We conducted a video conference with the Project Review Committee on progress on October 31, 2023. Work product to date was discussed and the materials covered were previously uploaded to the website. The major theme of the meeting was the range of comments received during the Public Survey and the impacts of some strategic suggestions and recommendations.

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Task 2 Report

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Task 2: Community Assessment, Labor, and Educational Institution Analysis

2.a – Background Research/Site Tours

Background Research

The history of Cape Coral is one that will shape its future. Originally developed by the Rosen Brothers in the late 1950's, the "Redfish Point" lands were intended to bring the waterfront dream of home ownership to middle-income Americans. The development company known as Gulf American Land Corporation was plagued with legal problems arising from its unconventional land sales techniques. With its over 400 miles of salt and freshwater canals and near absence of concentrated urban core, Cape Coral is a unique community that is still searching for an identity. The city was incorporated in 1970 and maintains a brisk growth pattern despite economic downturns, a pandemic, and severe weather disturbances.

Similar developments such as Port Charlotte and Punta Gorda have had their own storied histories but may be having some better results from commercial investment, due to the US 41 highway corridor traversing both communities. Cape Coral, although much larger in population and land area, suffers from lack of direct highway access other than mostly the bridge connections to the Fort Myers road network. As the sole land-side highway route for Cape Coral, the Pine Island Rd./Bayshore Rd. access to Interstate 75 is a traffic-burdened thoroughfare. The more northerly Del Prado Blvd. N. connection to US 41 might serve as a better entry to the city if a highway connection to I-75 can be accommodated.

At the time of the Kick-Off meeting, the DCG Corplan Team Project Manager was afforded guided automobile tours of Cape Coral by Team member Max Forgey and local planner Tom Slaughter, and separately by Economic Development Officer Sharon Woodbury. The Project Manager also took a self-guided tour of the city. Noted areas of particular concern were the yet to be completed Yacht Club restoration, the overgrown and vacant Cape Golf Course, the extensive traffic delays along major arteries, the unattractive condition of many downtown properties, the limited expanse of tree canopy, and the general lack of visual appeal for visitors entering Cape Coral.

Alternatively, the endless waterfront canal experience, the splendid architectural character of the Westin Marina Village and Cape Harbour, and the obvious potential of development success at The

Cove, Bimini Square, Seven Islands, and the Coral Grove Town Center all represent the exciting future that a city of this size should applaud.

Clearly, Cape Coral is on a trajectory. But a community already exceeding the population of Salt Lake City should already possess the numerous commercial, entertainment, and institutional venues that are presently lacking. A visible downtown skyline, a civic center, an active cultural district, a professional sports team – these are all missing from Cape Coral. And, a place with more miles of canals than any other city in the world that does not utilize and promote the tourism opportunity that this resource provides is clearly "missing the boat".

2.b – GIS Mapping

We have familiarized ourselves with the GIS mapping opportunities from the City's GIS. Where new maps may be needed for use in the study, they will be created through downloads of parcel data from the tax assessors' offices, tabular/shapefile data from various town, county, state and federal sources. Maps will be generated through use of ESRI ArcGis[1] and will coordinate with local GIS resources.

We appreciate the City's creation of the Interactive EDO Projects Map. Mapping is useful for indicating progress, and the GIS color coding of project status is a good idea. We will interface with the city about the possible use of ESRI StoryMaps[2] resource to bring more information to the user, such as narratives, street and aerial photography, videos, and more.

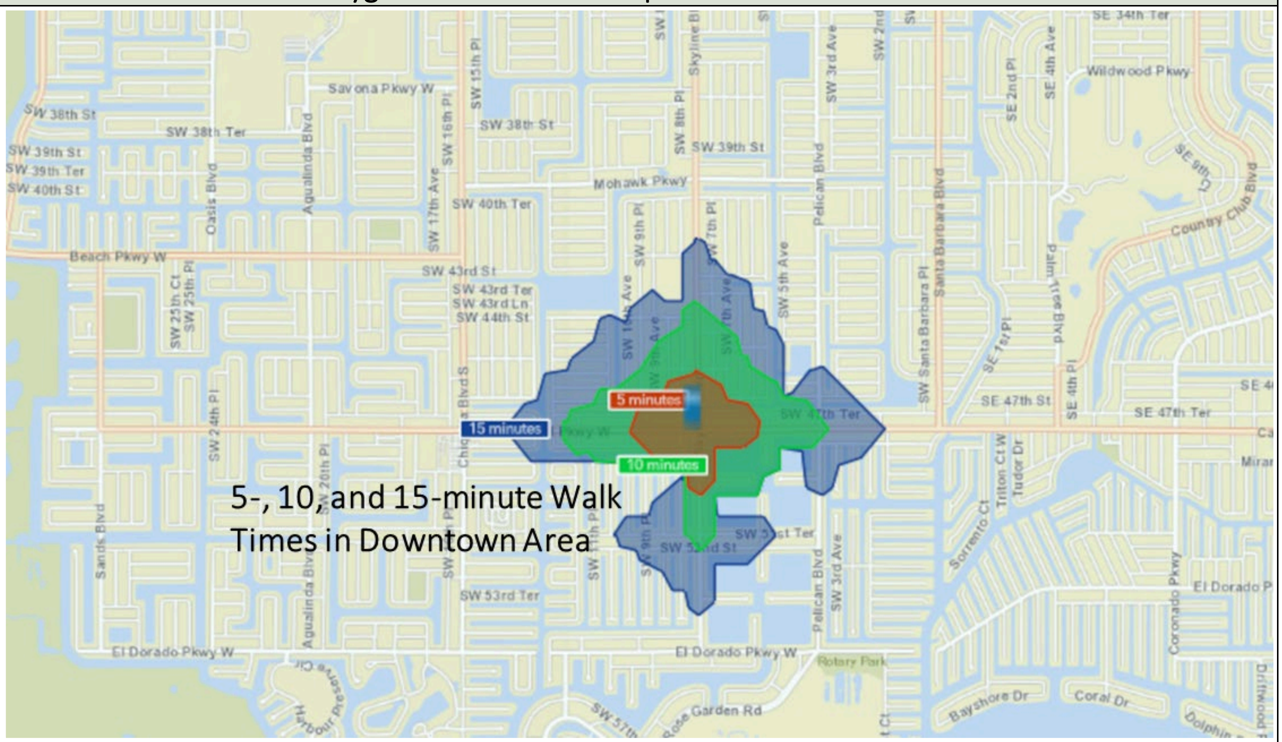
Base mapping implemented through ArcGIS integration with City of Cape Coral GIS resources. Map applications will include:

- Real estate and land use
- Infrastructure
- Transportation
- Political boundaries
- Cultural/Recreational amenities

[1] ESRI ArcGIS; industry leading GIS software provider; https://www.esri.com/en-us/arcgis/about-arcgis/overview
[2] ESRI ArcGIS StoryMaps; https://storymaps.arcgis.com/

An example of a GIS map application is shown below. In the graphic, walk times from the intersection of Cape Coral Parkway and Skyline Drive are shown to study the distance from a potential bus node to downtown attractions.

Exhibit 2.1 – Walk Time Polygons in Downtown Cape Coral



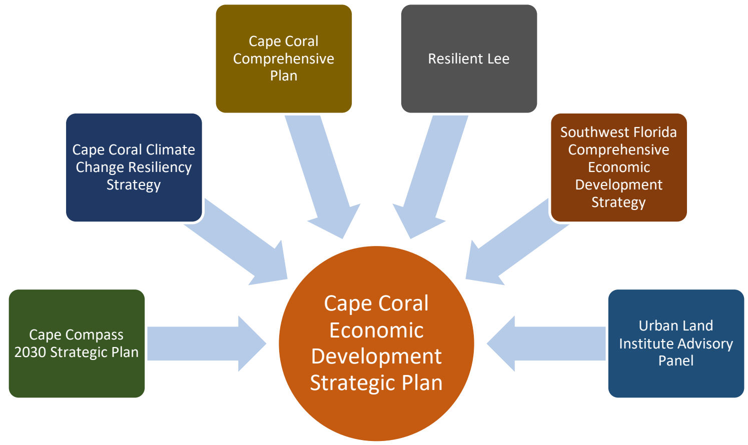
Source: ESRI ArcGIS

2.c – Review of Preceding Studies and Plans

We have reviewed available studies and strategies and have concluded that there are six key analyses that have presented economic development strategies that we should evaluate. They are as follows:

- Cape Compass 2030 Strategic Plan
- Cape Coral Climate Change Resiliency Strategy
- Cape Coral Comprehensive Plan
- Resilient Lee
- Southwest Florida Comprehensive Economic Development Strategy
- Urban Land Institute Advisory Panel

Review of Goals, Objectives, and Policies from the preceding economic development studies lays the groundwork for determining commonality of factors for the Cape Coral Economic Development Strategic Plan.



Six Pillars

The Southwest Florida Regional Planning Council's Six Pillars hierarchy for economic development presents the optimal means of aggregating the various recommended strategies from previous work:

- Talent Supply & Education (TS&E)
- Quality of Life & Quality of Places (QLQP)
- Infrastructure & Growth Leadership (I&GL)
- Civic & Governance Systems (C&GS)
- Business Climate & Competitiveness (BC&C)
- Innovation & Economic Development (I&ED)

In total, 94 strategic Goals were identified through review of the preceding studies, all accompanied by Objectives and Policy recommendations. In summary, the six pillar groups are ranked as follows by the number of common occurrences:

- Quality of Life & Quality of Places (31)
- Innovation & Economic Development (21)
- Civic & Governance Systems (20)
- Talent Supply & Education (11)
- Infrastructure & Growth Leadership (7)
- Business Climate & Competitiveness (4)

From the above analysis, it is clear that not enough emphasis is being placed on Talent, Infrastructure, and Business Competitiveness. Future efforts are needed to correct this imbalance in strategic approach.

Refer to the Task 2 Appendices for summaries of the six preceding studies.

2.d – Cape Coral Market Profile

Econographics

Demographics play an important part in any economic analysis, and DCG Corplan has originated a unique methodology for organizing information into useful categories that will be employed in later tasks as well. The analysis applies our comprehensive "Econographics" market profiling that provides demographic, economic, and social data for a broad range of categories in Cape Coral.

The result is a realistic profile of the City of Cape Coral market that would be useful to corporate site selectors and potential employers. We have compared these metrics against the State of Florida as a benchmark to gauge the community's strengths and weaknesses. The analysis also includes a comparative study of Cape Coral versus six other competing locations.

In most instances, the 2022 US Census data projected from the one-year average of the American Community Survey (ACS) have been employed. Additionally, some non-Census business data from has been drawn from a respected commercial source, ESRI. Each table footnotes source information. Results for each category are compared by the corresponding State of Florida average or figure. The following criteria and methodology have been applied in the 32 categories of investigation. Each table indicates its numerical position on the Econographics Market Profile.

Part 1 -Demographics

Population Growth

Size of the market area and growth trends gains determine potentials of an area to support proposed operations. *Methodology:* Use 10-year population growth from 2012-2022 period and index for percent growth. Highest index is the most favorable.

Population Growth (#1)			
	2012 Pop.	2022 Pop.	**% Change 2012-2022**
Cape Coral	161,237	216,984	**34.6%**
FL	19,317,568	22,244,823	**15.2%**
Population Growth			
Summary Index: **228.2**			
Index target: *>100 (higher)*			
Resultant: ***ADVANTAGE***			

Source: US Census Bureau, American Community Survey, Table S0101- 2022

Age and Gender

The key working ages are 18-34 and 35-44, but the overall working ages to 65 are important. *Methodology:* For Younger Workers, sum indexes for 18-44 years 2022 cohorts. For Mature Workers, sum indexes 45-64 44 years 2022 cohorts. Highest total indexes in both categories are the most favorable.

Younger Workers Age Group 18-44 (#2)				
	2022 Pop.	% Age group 18-24 yr. 2022	Age group 25-44 yr. 2022	**Age group 18-44 yr. 2022**
Cape Coral	216,984	6.3%	23.9%	**30.2%**
FL	22,244,823	8.3%	25.1%	**33.4%**

Younger Workers Age Group

Summary Index: **90.4**

Index target: *>100 (higher)*

Resultant: *NO ADVANTAGE*

Source: US Census Bureau, American Community Survey, Table S0101 – 2022

Mature Workers Age Group 45-64 (#3)				
	2022 Pop.	Age group 45-54 yr. 2023	Age group 55-64 yr. 2023	**Age group 45-64 yr. 2023**
Cape Coral	216,984	11.5%	14.3%	**25.8%**
FL	22,244,823	12.3%	13.4%	**25.7%**

Source: ESRI Business Analyst – Community Profile

Mature Workers Age Group

Summary Index: **100.4**

Index target: *>100 (higher)*

Resultant: ***ADVANTAGE***

Source: US Census Bureau, American Community Survey, Table S0101- 2022

Median age indicates the weighting of age cohorts. Younger populations tend to have greater numbers of available workers. Data suggests that populations with higher numbers of females can provide more workers able to participate in the labor force. For both Median Age and Male/Female Ratio, lower indexes are favorable.

Median Age and Male/Female Ratio (#4, #5)				
	Median age 2012	Median age 2022	Change in Median Age 2012-2022*	Male /Female Ratio 2022
Cape Coral	42.9	**45.8**	**6.8%**	**103.3**
FL	41.1	**42.7**	**3.9%**	**97.0**

Median Age (#4)	**Male/Female Ratio (#5)**
Summary Index: **107.3**	Summary Index: **106.3**
Index target: *<100 (lower)*	Index target: *<100 (lower)*
Resultant: *NO ADVANTAGE*	Resultant: *NO ADVANTAGE*

Source: US Census Bureau, American Community Survey, Table S0101- 2012-2022

**Note: Cape Coral is aging faster than The State of Florida.*

Racial Diversity

Racial diversity in the population base is a desirable attribute for most progressive employers. *Methodology:* Apply 2022 index for percent White and sum indexes for all other races. Highest non-White balance is best most favorable indicator of racial and ethnic diversity.

Racial Diversity (#6)		
	Cape Coral	FL
Population (2022)	216,984	22,244,823
% White Alone (2022)	73.4	55.9
% Black Alone (2022)	4.2	15.0
% American Indian Alone (2022)	0.3	0.4
% Asian Alone (2022)	0.9	2.9
% Other (2002)	3.6	6.6
% Two or More Races (2022)	17.7	19.1
% Hispanic origin - may be of any race (2022)	22.6	27.1
Total non-white/white ratio (2022)	**0.67**	**1.27**
Racial Diversity		
Summary Index: **52.8**		
Index target: >100 (*higher)*		
Resultant: NO ADVANTAGE		

Source: US Census Bureau, American Community Survey, Table DP05 - 2022

Language Competence

English spoken at home is indicator of the impact of immigration and attitudes toward education within the household. Using the 2022 population of five years and older, the percentage of English spoken at home is selected. Higher figure is the most favorable.

Language Competence (#7)		
	2022 Pop. Age 5+	**% English Only Spoken at home 2022**
Cape Coral	206,285	**78.6%**
FL	21,143,473	**69.8%**
Language Competence		
Summary Index: **112.6**		
Index target: >100 (*higher)*		
Resultant: ***ADVANTAGE***		

Source: US Census Bureau, American Community Survey, Table S1601 - 2022

Households and Median Income

Larger households mean more workers potentially available to the labor force. And, income is the foundation for the economic structure of a market area which has a direct an impact upon local wages, retail sales, housing prices, etc. *Methodology:* Compare 2022 indexes for household size and median household income. Higher figures are the most favorable.

Households and Median Income (#8, #9)				
	Population 2022	No. of households 2022	Size of Household	**Median Household income 2022**
Cape Coral	216,984	81,419	**2.67**	**$76,991**
FL	22,244,823	8,826,394	**2.52**	**$69,303**
Household Size (#8)		**Median Income (#9)**		
Summary Index: **105.7**		Summary Index: **111.1**		
Index target: *>100 (higher)*		Index target: *>100 (higher)*		
Resultant: ***ADVANTAGE***		Resultant: ***ADVANTAGE***		

Source: US Census Bureau, American Community Survey, Table S1901 - 2022

Educational Attainment

As businesses become more complex, increasing dependence is placed upon preparedness of employees to perform their assigned tasks. *Methodology:* Sum 2022 indexes for percentages of residents age 25 and over who have attained associate degrees, bachelor's degrees, or graduate or professional degrees. Highest total is the most favorable.

Educational attainment (#10)	Pop 25+ 2022	% AA Cert. 2022	% Bachelors degree. 2022	% Graduate degree(s) 2022	**% College Grads 2022**
Cape Coral	162,276	12.2	17.6	9.1	**38.9**
FL	16,104,410	10.2	21.4	12.9	**44.5**

Educational Attainment
Summary Index: **87.4**
Index target: >100 (*higher)*
Resultant: *NO ADVANTAGE*

Source: US Census Bureau, American Community Survey, Table S1501 - 2022

Housing

Since housing prices are in a state of flux, the reported value of owner-occupied units and the median household price are the most reliable Indicators. More owned homes at affordable rates may indicate stability of the housing market. *Methodology:* Apply index for the rate of home ownership and median home value in 2022. Higher index for ownership rate and lower for home value are the most favorable.

Housing (#11, #12)	**No. Owner occupied units 2022**	**Median household value 2022**
Cape Coral	**75.9%**	**$379,600**
FL	**67.2%**	**$354,100**

Homeownership Rate (#11)	**Median Home Value (#12)**
Summary Index: **112.9**	Summary Index: **107.2**
Index target: *>100 (higher)*	Index target: *<100 (lower)*
Resultant: ***ADVANTAGE***	Resultant: *NO ADVANTAGE*

Source: US Census Bureau, American Community Survey, Table DP04 - 2022

Cost of Living

The 2021 Florida State average cost of living index is 101.9. *Methodology:* Apply the published index for Cape Coral as compared to the FL mean, with lowest index as most favorable.

Cost of Living (#13)		
	Population 2022	**Cost of living index 2021**
Cape Coral	216,984	**92.5**
FL	22,244,823	**101.9**
Cost of Living		
Summary Index: **90.8**		
Index target: <100 (*lower)*		
Resultant: ***ADVANTAGE***		

Sources: City-data.com; Missouri Economic Research and Information Center – Composite Costs of Living by US State

Quality of Life (#14, #15 & 11)

Comparative scores are assigned to crime, health care, culture and recreation based upon: Crime rates; Physicians per 1,000 of population; and, the Tourism/Leisure industries (arts, entertainment, recreation, accommodation & food services) employment per 1,000 of population. *Methodology:* Create 2022 indexes for the three components. Lowest index for crime and highest indices for physicians and tourism/leisure employment are sought as the most favorable for the attraction of transferees and their families.

Quality of life						
	Population 2022	**Crime index (2023)**	# of Physicians 2022	**Physicians per 1,000 pop. 2022**	Arts, entain't.,recr., accom. & food srvcs. 2022	**Arts, entain't.,recr., accom. & food srvcs employment per 1,000 2022 pop.**
Cape Coral	216,984	**105.0**	4,380	**20.2**	10,989	**50.6**
FL	19,317,568	**100.0**	468,796	**24.3**	1,140,617	**59.0**

Crime Index (#14)	**# of Physicians (#15)**	**A,E,R,A&FS Empl. (#16)**
Summary Index: **105.0**	Summary Index: **83.2**	Summary Index: **85.8**
Index target:*<100 (lower)*	Index target: *>100 (higher)*	Index target: *>100 (higher)*
Resultant: *NO ADVANTAGE*	Resultant: *NO ADVANTAGE*	Resultant: *NO ADVANTAGE*

Sources: USA.com; WorldPopulationReview.com; US Census American Community Survey Table S-2401, 2403 - 2022; ESRI Business Analyst - Community Profile 2023

Part 2 – Economics

Labor Market Status

With national unemployment rate currently at 3.9 %, the labor market is tight. Employers around the nation complain about shortages of skilled workers, but national labor participation rate is not at high levels and there is evidence of shrinking as unemployed persons become discouraged and stop seeking jobs. *Methodology:* Calculate labor participation rate by division of civilian labor force by population of age 16 years and older for 2022 (*Note: although the 18-65 years working age group is a preferred target for this analysis, Census statistics are only complied on the 16 years and older category*). A higher index is the most favorable for new employers entering the market.

Labor market status (#17)

	Population 16+ yrs 2022	Civilian labor force 2022	**Labor force participation rate (%) 2022**
Cape Coral	180,723	106,365	**58.9%**
FL	18,459,053	10,924,091	**59.2%**

Labor Market Status
Summary Index: **99.5**
Index target: >100 (*higher)*
Resultant: *NO ADVANTAGE*

Source: US Census Bureau, American Community Survey, Table DP03 - 2022

Area Business Patterns

Stable economies have a good balance of goods-producing and service producing industries. *Methodology:* The four goods-producing industries in the U.S. are (1) forestry, hunting and agriculture support; (2) mining; (3) construction; and (4) manufacturing. *Methodology:* Sum the 2022 indexes for these four good-producing industries for the area. Next, sum indexes for all other industries excluding the public administration industry. Then divide Goods-producing by Service-producing sums and multiply by 100 to create a new index ratio. Highest total index is most favorable. (*Note: Public administration is excluded as the category as it may cover portions of both goods- and service-producing sectors and data is unavailable for segmentation*).

Area Business Patterns (#18)

Goods-producing	Cape Coral	FL
Employed Population 16+ yrs 2021	102,700	10,489,216
Agriculture, forestry, fishing and hunting	901	82,477
Mining, quarrying, and oil and gas extraction	0	7,859
Construction	11,340	856,991

Manufacturing	5,124	545,806
Service-Producing		
Wholesale trade	1,775	235,585
Retail trade	13,148	1,295,078
Transportation and warehousing	6,241	582,561
Utilities	160	80,483
Information	924	166,629
Finance and insurance	4,617	578,938
Real estate and rental and leasing	1,925	295,443
Professional, scientific, and technical services	6,467	871,990
Management of companies and enterprises	44	11,372
Administrative and support and waste management services	5,954	599,229
Educational services	8,121	772,046
Health care and social assistance (2021	16,696	1,401,534
Arts, entertainment, and recreation	2,591	312,464
Accommodation and food services	8,398	828,153
Other services, except public administration	4,808	531,459
Total Goods-producing	**17,365**	**1,493,133**
Total Service-producing	**81,869**	**8,562,964**
Goods/Service producing industries ratio 2022	**21.2**	**17.4**

Labor Market Status
Summary Index: **121.6**
Index target: >100 (*higher)*
Resultant: ***ADVANTAGE***

Source: US Census Bureau, American Community Survey, Table s2403- 2022

Average Hourly Wages - Goods Producing Industries

Increasingly sophisticated business operations require a higher percentage of technically trained skilled workers at reasonable salary levels. Compute the weighted average hourly wages the four goods-producing from Table 18 above. *Methodology:* Apply the total 2022 indexes for these industry groups. Lowest total is most favorable.

Average Hourly Wages - Goods Producing Industries (#19)		
Goods-producing Industries	Cape Coral	FL
Agriculture, forestry, fishing and hunting	$11.79	$17.74
Mining, quarrying, and oil and gas extraction	$0.00	$30.60
Construction	$25.94	$23.26
Manufacturing	$38.87	$27.04
Goods-producing average hourly wage 2022	**$29.02**	**$24.38**

Goods Producing Industries Average Hourly wages
Summary Index: **119.1**
Index target: <100 (*lower)*
Resultant: *NO ADVANTAGE*

Source: US Census Bureau, American Community Survey, Table s2414- 2022

Average Hourly Wages – Service-Producing Industries

Lower operating costs for service-producing occupations translate to higher profitability. The Service-producing occupations cover the remining fifteen industries from Table #18. *Methodology:* Apply the 2022 total indexes for these industry groups. Lowest total is most favorable.

Average Hourly Wages - Service Producing Industries (#20)		
Service-Producing	Cape Coral	FL
Wholesale trade	$19.80	$27.24
Retail trade	$20.00	$18.98
Transportation and warehousing	$27.82	$24.16
Utilities	$19.77	$34.34
Information	$26.18	$31.54
Finance and insurance	$28.23	$33.26
Real estate and rental and leasing	$21.22	$25.80
Professional, scientific, and technical services	$24.88	$37.79
Management of companies and enterprises	$45.15	$45.22
Administrative and support and waste management services	$20.46	$19.47
Educational services	$22.49	$24.16
Health care and social assistance (2021	$23.88	$24.60
Arts, entertainment, and recreation	$17.63	$20.31
Accommodation and food services	$14.33	$15.78
Other services, except public administration	$23.44	$19.45
Service- producing average hourly wage 2022	**$22.17**	**$24.29**

Service Producing Industries Average Hourly wages
Summary Index: **91.3**
Index target: <100 (*lower)*
Resultant: ***ADVANTAGE***

Source: US Census Bureau, American Community Survey, Table s2414- 2022

Real Estate - Commercial and industrial Rents (#21, #22, #23)

Most new employers opt for or suburban Class A office space or "flex" industrial space if available. In this region, there may be a difficulty finding either product. *Methodology:* Apply indices for triple net rent per square foot for all suburban office and industrial space categories. Lowest rent indices are the most favorable.

Real Estate - Commercial and industrial Rents		
COMMERCIAL	Analyzed Inventory (sf)	Avg. Commercial Office Asking Rent (2023)
Cape Coral	201,561	**$28.29**
FL	213,392,148	$33.58
INDUSTRIAL	Analyzed Inventory (sf)	Avg. Industrial Office Rent (2023)
Cape Coral	44,881	**$19.31**
FL	681,163,508	**$10.96**

Commercial Rent (#21)	Industrial Rent (#22)
Summary Index: **84.2**	Summary Index: **176.2**
Index target: *<100 (lower)*	Index target: *<100 (lower)*
Resultant: ***ADVANTAGE***	Resultant: *DISADVANTAGE*

Sources: CoStar; Loopnet; Cushman & Wakefield - 2023; DCG Corplan Consulting LLC

Comparative land prices for commercial (non-residential) and industrial sites indicate valuation fluctuations per market. In order to determine an overall FL State mean, 50 land offerings throughout the State (2023) were weighted averaged by size and price per acre. *Methodology:* Apply an index of weighted average of local commercial industrial land prices against the State mean. Lowest price index is the most favorable.

Real Estate - Commercial and industrial Land (#23)		
	Analyzed Inventory (acres)	Commercial / Industrial Land Price/acre (2023)
Cape Coral	147.2	**$294,946**
FL	8,386	$57,968

Average Commercial/Industrial Land Prices
Summary Index: **508.8**
Index target: <100 (*lower)*
Resultant: *NO ADVANTAGE*

Sources: CoStar; Loopnet – 2023; DCG Corplan Consulting LLC

Electric Rates (#24, #25)

Operating profits are significantly affected by variation in electric power costs. Individually negotiated rates may be possible, however, published rates are utilized for the comparison. *Methodology:* Apply an indexes for commercial and industrial average cents per Kwh for 2023 and compare to FL State average. Lower indices are favorable.

Commercial and Industrial Electric Rates	
COMMERCIAL	Avg. Electricity Prices Cents/Kwh (2023**)**
Cape Coral	**8.97**
FL	**11.30**
INDUSTRIAL	Avg. Electricity Prices Cents/Kwh (2023**)**
Cape Coral	**8.71**
FL	**9.49**

Commercial Electric Rate (#24)	Industrial Electric Rate (#25)
Summary Index: **79.4**	Summary Index: **91.8**
Index target: *<100 (lower)*	Index target: *<100 (lower)*
Resultant: ***ADVANTAGE***	Resultant: ***ADVANTAGE***

Source: Findenergy.com - 2023

Part 3 – Market Access

Market Potential

For operations at a location, the percent of total US population within six-hour driving radius approximates its practical “just-in-time” delivery zone and aligns with the new operating regulations for the trucking industry. Using a 300-mile drive buffer, a capture of the percentage of US population is reachable based on a polygon of the targeted region. The centroid for the State of Florida is within Citrus County. *Methodology:* Apply indexed percentage of population reached, with the highest index as the most favorable.

Market Potential (#26)

	US Population within 300 miles (2023)	**% of US Pop within 300 miles (2023)**
Cape Coral	20,594,996	**6.2**
FL	23,647,795	**7.1**
USA Pop 2023	331,449,281	

Market Potential

Summary Index: **87.1**

Index target: >100 (*higher)*

Resultant: *NO ADVANTAGE*

Source: ESRI Business Analyst - ACS Key Population & Household Facts - 2023

Retail Sales

Annual retail sales represents the location’s relative strength. While traditional Gap/Leakage assessments have been the standard approach to this answer, the impact of online shopping and its effect on brick and mortar establishments have rendered this approach less than reliable. *Methodology:* Utilizing ESRI’s Retail Demand Outlook, apply retail sales per capita in nine retail categories index against the Florida State figure. Highest index is the most favorable.

Retail Sales (#27)

	Cape Coral	FL
Apparel & Services ($000's)	$153,648	$35,071,122
Computers ($000's)	$21,296	$2,449,084
Entertainment & Recreation ($000's)	$277,505	$30,759,573
Food ($000's)	$802,035	$91,590,781
Health ($000's)	$49,339	$5,476,955
Household Furnishings & Equipment ($000's)	$134,392	$15,005,690
Household Operations ($000's)	$199,577	$22,462,327
Travel ($000's)	$319,256	$35,777,173
Total Retail Expenditures ($000's)	$1,957,048	$238,592,705

Est. 2023 Retail sales per capita	$9,019	$10,660
Market Potential		
Summary Index: **84.6**		
Index target: >100 (*higher)*		
Resultant: *NO ADVANTAGE*		

Source: ESRI Business Analyst - Retail Demand Outlook 2023

Worker Mobility (#28, #29. #30, #31)

Successful development often hinges on the potential to provide an intercept location for workers traveling long commutes. Mean travel time to work, commutation outside of place of residence, working from home, and having 2 or more vehicles available are indicators of relative mobility for employees. *Methodology:* Apply indexes for all four categories. Highest indexes are most favorable for all but Worked from Home, where a lower index is more favorable.

Worker Mobility	Employed Population 16+ yrs 2022	Mean travel time to work (mins) 2022	% Commute Outside Place of residence 2022	Worked from Home	% 2 or more vehicles available 2022
Cape Coral	102,700	**29.7**	**55.5**	**13.2**	**47.6**
FL	10,489,216	**29.0**	**46.8**	**15.1**	**44.0**

Mean Travel Time to Work (#28)	Commute Outside Place of residence (#25)
Summary Index: **102.4**	Summary Index: **118.6**
Index target: >*100 (higher)*	Index target: >*100 (higher)*
Resultant: ***ADVANTAGE***	Resultant: ***ADVANTAGE***
Worked from Home (#30)	**2 or More Vehicles (#31)**
Summary Index: **87.4**	Summary Index: **108.2**
Index target: <*100 (lower)*	Index target: >*100 (higher)*
Resultant: ***ADVANTAGE***	Resultant: ***ADVANTAGE***

Source: US Census Bureau, American Community Survey Table S0801 - 2022

Airport Accessibility

For most businesses, access to a major airport offering domestic connecting or non-stop service and international flights is a key driver for location success. Although there are no published statistics on average driving times to airports offered on a state average, this study will assume a forty-five-minute commuting time as a benchmark to measure local results. Utilizing Google Maps, times from the center of Cape Coral to Southwest Florida International Airport is used. *Methodology:* Apply an index of weighted average of airport travel time against the State mean. Lowest index is the most favorable.

Airport Access (#32)		
	Civilian labor force (2022)	**Travel time (mins.)**
Cape Coral	106,365	**35.0**
FL	10,924,091	**45.0**

Airport Access
Summary Index: **77.8**
Index target: >100 (*higher)*
Resultant: ***ADVANTAGE***

Sources: US Census Bureau, Table DP03 - 2022, Google Maps

Econographics Conclusions

In summary, the Econographics Market Profile creates a picture of how the City of Cape Coral has advantages to promote, and where lack of advantages presents an opportunity for improvement. The 32 analysis categories have produced **17** Advantages, which when divided by the total, result in an Econographics score of **53.1** points. This score is in the 3rd quartile of point tally, which makes Cape Coral a **Competitive l**ocation. The summary of the 32-category analysis in shown in Exhibit 2.2 at the end of this section.

Competing Locations

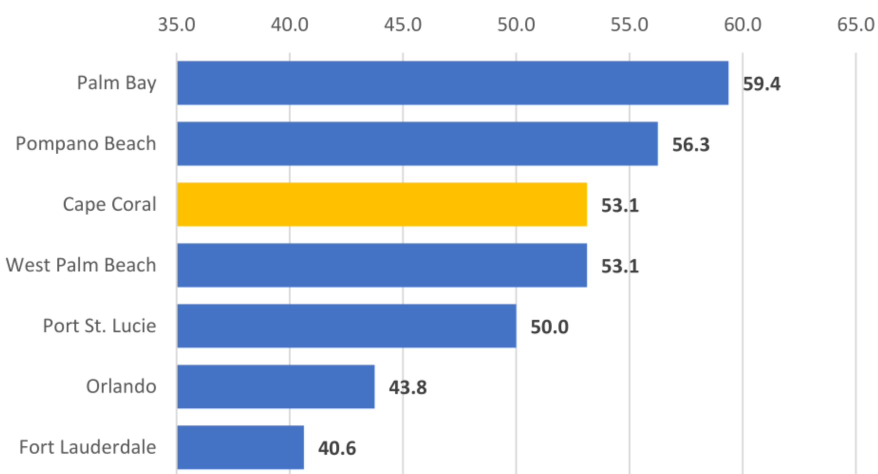
The Econographics Market Profile is an exceptional tool when comparing a location against a State or national benchmark. But its value is also noteworthy when trying to determine the location's performance against a group of competitors. For this analysis, we wanted to know which Florida cities were Cape Coral's true competition, not just Fort Myers or another Southwest Florida community.

To accomplish this evaluation, we began with a list of the cities in Florida with a population of 100,000 or greater. This resulted in the identification of **22** municipalities, as shown in Exhibit 2.3, with Cape Coral occupying the eighth in size. The data used for this is derived from ESRI, rather than US Census, due to the 2028 projections afforded by this source.

As a means of equating relative size, we screened for population differential of cities that were in the range of less than twice the size or more than half that of Cape Coral. The list narrowed to **20** cities, removing the two mega-populations of Jacksonville and Miami from the comparison. We then compared the 2023-2028 projected annual rate of population growth for each of the cities as compared to the **0.63%** annual rate anticipated for the State of Florida. This produced a final selection of **6** cities as true competitors to Cape Coral:

Florida City	2023 Total Population	2028 Pop. Projection	2023 Pop. Rank	Annual Growth Rate (AGR) 2023-2028	2023 Pop. Diff'l to CC	2023 Pop. Diff'l Range <2.0, >0.5 to CC	2023-2028 AGR > FL AGR	Final Selection
Orlando	323,217	349,511	4	1.58%	1.55	■	■	■
Port St. Lucie	228,377	245,745	6	1.48%	1.10	■	■	■
Cape Coral	**207,883**	**217,479**	**8**	**0.91%**	**1.00**	■	■	■
Fort Lauderdale	190,927	197,911	10	0.72%	0.92	■	■	■
Palm Bay	126,199	132,363	16	0.96%	0.61	■	■	■
West Palm Beach	121,007	126,246	17	0.85%	0.58	■	■	■
Pompano Beach	115,767	119,568	20	0.65%	0.56	■	■	■
Florida	**22,381,338**	**23,091,949**		**0.63%**				

As generated for Cape Coral, we produced Econographics Market Profiles for each of the 6 competing cities. Using the Score Index, we tallied the results and are shown in the chart below:



As illustrated, Cape Coral's strong position among other Florida cities is a clear indicator that the City has marketability among its peers. The comparisons are continued in the Task 2.f - SWOT Analysis later in this report. Refer to the Appendices for more detail regarding the competing cities.

Exhibit 2.2 – Econographics Market Profile – Cape Coral

Data #		FL benchmark	Cape Coral Summary Item	Index	Advantages	Index target
Part 1 - Demographics						
Population Growth						
1	Population Change 2012-2022 %	15.2%	34.6%	*228.2*	■	↑
Age and Gender						
2	Younger Workers Age group 18-44 (2022)	33.4%	30.2%	*90.4*		↑
3	Mature Workers Age group 45-64 (2022)	25.7%	25.8%	*100.4*	■	↑
4	Median age (2022)	42.7	45.8	*107.3*		↓
5	Male/Female ratio (2022)	97.0	103.1	*106.3*		↓
Racial Diversity						
6	Total non-white/white ratio (2022)	1.27	0.67	*52.8*		↑
Language Competence						
7	% English Only Spoken at home (2022)	69.8%	78.6%	*112.6*	■	↑
Households and median income						
8	Avg. Size of Household (2022)	2.52	2.67	*105.7*	■	↑
9	Median Household income (2022)	$69,303	$76,991	*111.1*	■	↑
Educational Attainment						
10	% College Grads (2022)	44.5%	38.9%	*87.4*		↑
Housing						
11	Home Ownership Rate (2022)	67.2%	75.9%	*112.9*	■	↑
12	Median home value (2022)	$354,100	$379,600	*107.2*		↓
Cost of Living						
13	Cost of living index (2021)	101.9	92.5	*90.8*	■	↓
Quality of Life						
14	Crime index (2023)	100.0	105.0	*105.0*		↓
15	Physicians per 1K population (2022)	21.1	20.2	*95.8*		↑
16	Arts, leisure, tourism & hospitality employ. per 1K pop. (2022)	51.3	50.6	*98.8*		↑
Part 2 - Economics						
Labor Market Status						
17	Labor force participation rate (2022)	59.2%	58.9%	*99.5*		↑
Area Business Patterns						
18	Goods/Service producing industries ratio (2022)	17.4	21.2	*121.6*	■	↑
Average Hourly Wages - Goods Producing Industries						
19	Goods producing workers hrly wages (2022)	$24.38	$29.02	*119.1*		↓
Average Hourly Wages - Service Producing Industries						
20	Service producing workers hrly wages (2022)	$24.29	$22.17	*91.3*	■	↓
Real Estate - Commercial and Industrial						
21	Avg. Office Rent/sf (2023)	$33.58	$28.29	*84.2*	■	↓
22	Avg. Indus'l Rent/sf (2023)	$10.96	$19.31	*176.2*		↓
23	Avg. Commercial/Industrial Land Price/acre (2023)	$57,968	$294,946	*508.8*		↓
Electric Rates						
24	Commercial electricity rate (cents/kwh) (2023)	11.30	8.97	*79.4*	■	↓
25	Industrial electricity rate (cents/kwh) (2023)	9.49	8.71	*91.8*	■	↓
Part 3 - Market Access						
Market Potential						
26	% of US within 300-mile radius (2023)	7.1%	6.2%	*87.1*		↑
Retail Sales						
27	Retail sales per capita (2023)	$10,660	$9,414	*88.3*		↑
Worker Mobility						
28	Mean travel time to Work - minutes (2022)	29	29.7	*102.4*	■	↑
29	Commute outside place of residence (2022)	46.8%	55.5%	*118.6*	■	↑
30	Worked from home (2022)	15.1%	13.2%	*87.4*	■	↓
31	2 or more vehicles available (2022)	44.0%	47.6%	*108.2*	■	↑
Airport Access						
32	Travel time to nearest major airport - minutes (2023)	45.0	35.0	*77.8*	■	↓

Scoring Quartiles						
75.1	100.0	4th quartile - Very Competitive	*Legend*	**Total**	17	Score
50.1	**75.0**	**3rd quartile - Competitive**	*Meets criteria for* ***Advantage***		■	**53.1**
25.1	50.0	2nd quartile - Somewhat Competitive	*Higher index is more favorable*		↑	
0	25.0	1st quartile - Not Competitive	*Lower Index is more favorable*		↓	

Exhibit 2.3 – Comparison of Florida Cities over 100K in Population								
Florida City	2023 Est. Population	2028 Pop. Projection	2023 Pop. Rank	Annual Growth Rate (AGR) 2023-2028	2023 Pop. Differential to Cape Coral	2023 Pop. Differential Range <2.0, >0.5 to Cape Coral	2023-2028 AGR > FL AGR	Final Selection
Jacksonville	986,073	1,013,140	1	0.54%	4.74			
Miami	458,751	492,267	2	1.42%	2.21		■	
Tampa City	396,324	403,325	3	0.35%	1.91	■		
Orlando	323,217	349,511	4	1.58%	1.55	■	■	■
St. Petersburg	261,111	263,958	5	0.22%	1.26	■		
Port St. Lucie	228,377	245,745	6	1.48%	1.10	■	■	■
Hialeah	223,461	227,001	7	0.31%	1.07	■		
Cape Coral	**207,883**	**217,479**	**8**	0.91%	1.00	■	■	■
Tallahassee	199,256	200,895	9	0.16%	0.96	■		
Fort Lauderdale	190,927	197,911	10	0.72%	0.92	■	■	■
Pembroke Pines	172,030	171,334	11	-0.08%	0.83	■		
Hollywood	154,971	159,243	12	0.55%	0.75	■		
Gainesville	142,047	141,710	13	-0.05%	0.68	■		
Miramar	138,215	142,055	14	0.55%	0.66	■		
Coral Springs	134,764	136,291	15	0.23%	0.65	■		
Palm Bay	126,199	132,363	16	0.96%	0.61	■	■	■
West Palm Beach	121,007	126,246	17	0.85%	0.58	■	■	■
Clearwater	118,764	119,936	18	0.20%	0.57	■		
Lakeland	117,606	119,725	19	0.36%	0.57	■		
Pompano Beach	115,767	119,568	20	0.65%	0.56	■	■	■
Miami Gardens	114,252	114,001	21	-0.04%	0.55	■		
Davie	107,089	108,809	22	0.32%	0.52	■		
State of Florida	**22,381,338**	**23,091,949**		**0.63%**				

Source: ESRI Business Analyst

2.e – Educational Institution Analysis

In the preceding market profile, we will have ascertained Cape Coral's educational attainment statistics. In this task, we will review the post-high school education environment. Using the College Navigator[3], there are eight four-year colleges, six two-year institutes, and nine less-than two-year schools within 50 miles of Cape Coral zip code 33990 (Note: Florida SouthWestern and Southern Technical Colleges appear in both 2-year and 4-year categories):

4-Year Colleges (Location)

- Florida Gulf Coast University (Fort Myers)
- Florida SouthWestern State College (Fort Myers)
- Southern Technical College (Fort Myers)
- Hodges University (Fort Myers)
- Keiser University-Ft Myers (Fort Myers)
- Rasmussen University-Fort Myers (Fort Myers)
- Ave Maria School of Law (Naples)
- Ave Maria University (Ave Maria)

2-Year Colleges (Location)

- Premiere International College (Fort Myers)
- Florida SouthWestern State College (Fort Myers)
- Southern Technical College (Fort Myers)
- Fort Myers Technical College (Fort Myers)
- Jersey College (Port Charlotte)
- Immokalee Technical College (Immokalee)

<2 Year Colleges (Location)

- Aveda Institute-Fort Myers (Fort Myers)
- The Salon Professional Academy-Ft Myers (Fort Myers)
- Cape Coral Technical College (Cape Coral)
- Lee Professional Institute (Fort Myers)
- Florida Academy (Fort Myers)
- Paul Mitchell the School-Fort Myers (Fort Myers)
- Cozmo Beauty School (Bonita Springs)
- Charlotte Technical College (Port Charlotte)
- Lorenzo Walker Technical College (Naples)

In total, **12,891** degrees or certificates were conferred in the 50-mile area in 2022 as shown below[4]:

[3] National Center for Education Statistics; CollegeNavigator; https://nces.ed.gov/collegenavigator/
[4] Note: Non-reporting of 2022 graduation data by Keiser University-Fort Myers and Rasmussen University-Fort Myers

Category	2022 awards
Certificate	2,958
Associate	5,334
Bachelors	3,959
Masters	522
Doctorate	118
Total	**12,891**
Net college graduates	**9,933**

In terms of higher education performance, deduction of certificate-holders results in the figure of **9,933** degrees awarded in the last year. The **10** most popular fields of study most sought by college students in 2022 beyond the certificate level are shown in the table below. Refer to Exhibit 2.4 at the end of this section for the complete list. (See Appendices for degrees and certificates awarded):

Programs/Majors	2022 Total	Rank
Liberal Arts and Sciences, General Studies and Humanities	3,586	1
Health Professions and Related Programs	1,287	2
Business, Management, Marketing, and Related Support Services	967	3
Health Professions and Related Programs	743	4
Education	306	5
Multi/Interdisciplinary Studies	305	6
Psychology	298	7
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	254	8
Biological and Biomedical Sciences	189	9
Communication, Journalism, and Related Programs	180	10
Top 10 Most popular programs/majors degrees	**8,115**	
Top 10 Most popular programs/majors degrees by %	**82%**	

Cape Coral Area vs University of Florida

To better understand if the Cape Coral area higher educational attainment is in keeping with national or state norms, we selected the University of Florida (UFL) in Gainesville as a representative benchmark. The University of Central Florida is a larger school by about 12,000 students, but UFL is highest ranked university in the state[5]. Programs/majors for this large college likely support what business fields are seeking in terms of new talent. In 2022, UFL conferred

[5] US World & news Report; 2024 Best Colleges in Florida; https://www.usnews.com/best-colleges/fl

16,223 degrees in Associates, Bachelors, Masters, and Doctorate levels. Correlation with the Cape Coral area schools' program/majors was high, with the exceptions noted below:

Programs/majors not offered by Cape Coral area schools but covered at UFL

- Agricultural/Animal/Plant/Veterinary Science and Related Fields
- Area, Ethnic, Cultural, Gender, and Group Studies
- Family and Consumer Sciences/Human Sciences

Progams/majors not offered by UFL but covered by Cape Coral area schools

- Law
- Public Administration and Social Service Professions
- Science Technologies/Technicians
- Theology and Religious Vocation

With the exceptions deducted, the net totals of degrees granted by the Cape Coral area schools and the UFL in 2022 were **9,701** and **15,362**, respectively and in **24** common fields of study. Exhibit 2.5 later in this section provides the complete picture. For UFL, the 10 leading fields by percent accounted for **82%** of graduates in 2022:

1. Business, Management, Marketing, and Related Support Services
2. Health Professions and Related Programs
3. Engineering
4. Biological and Biomedical Sciences
5. Social Sciences
6. Communication, Journalism, and Related Programs
7. Psychology
8. Education
9. Computer and Information Sciences and Support Services
10. Visual and Performing Arts

For the Cape Coral area schools, the 10 leading fields by percent accounted for **93%** of graduates in 2022:

1. Liberal Arts and Sciences, General Studies, and Humanities
2. Health Professions and Related Programs
3. Business, Management, Marketing, and Related Support Services
4. Education

5. Homeland Security, Law Enforcement, Firefighting &Related Prot. Services
6. Multi/Interdisciplinary Studies
7. Psychology
8. Biological and Biomedical Sciences
9. Communication, Journalism, and Related Programs
10. Engineering

When graphically compared, it is apparent that the UFL and Cape Coral area schools have some significant differences. As shown in Exhibit 2.6 at the end this section and ranked by UFL percent, several fields of study have large imbalances in terms of percent of graduates. We would consider these areas of concern (weakness) for the Cape Coral area school curriculums. Areas of weakness for the Cape Coral area schools are:

- Engineering
- Biological and Biomedical Sciences
- Social Sciences
- Communication, Journalism, and Related Programs
- Computer and Information Sciences and Support Services
- Visual and Performing Arts
- Physical Sciences

On the other hand, areas of dominance for the Cape Coral area schools are:

- Liberal Arts and Sciences, General Studies, and Humanities
- Homeland Security, Law Enforcement, Firefighting and Related Protective Services

We recommend that educators in the Cape Coral area begin to review matriculation figures as well as admission data. If significant numbers of students from Cape Coral choose to attend UFL rather than the local area schools, there may be an opportunity to revamp curriculums that are more attuned to the needs of local students. With over 41,000 people under the age of 18 in Cape Coral, and this potential student demand for technology, sciences, arts, and communication should not be overlooked.

Exhibit 2.4 – Cape Coral Area Programs/Majors Degrees Awarded 2022

Programs/Majors	2022 Total	Rank
Liberal Arts and Sciences, General Studies and Humanities	3,586	1
Health Professions and Related Programs	1,287	2
Business, Management, Marketing, and Related Support Services	967	3
Health Professions and Related Programs	743	4
Education	306	5
Multi/Interdisciplinary Studies	305	6
Psychology	298	7
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	254	8
Biological and Biomedical Sciences	189	9
Communication, Journalism, and Related Programs	180	10
Education	179	11
Engineering	158	12
Business, Management, Marketing, and Related Support Services	149	13
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	122	14
Business, Management, Marketing, and Related Support Services	117	15
Computer and Information Sciences and Support Services	115	16
Social Sciences	98	17
Natural Resources and Conservation	82	18
Health Professions and Related Programs	80	19
Law	75	20
Visual and Performing Arts	58	21
Parks, Recreation, Leisure, Fitness, and Kinesiology	56	22
Public Administration and Social Service Professions	54	23
Public Administration and Social Service Professions	52	24
English Language and Literature/Letters	48	25
Legal Professions and Studies	48	25
Health Professions and Related Programs	35	27
Legal Professions and Studies	35	27
History	27	29
Architecture and Related Services	26	30
Philosophy and Religious Studies	22	31
Science Technologies/Technicians	22	31
Education	20	33
Theology and Religious Vocations	19	34
Computer and Information Sciences and Support Services	13	35
Natural Resources and Conservation	12	36

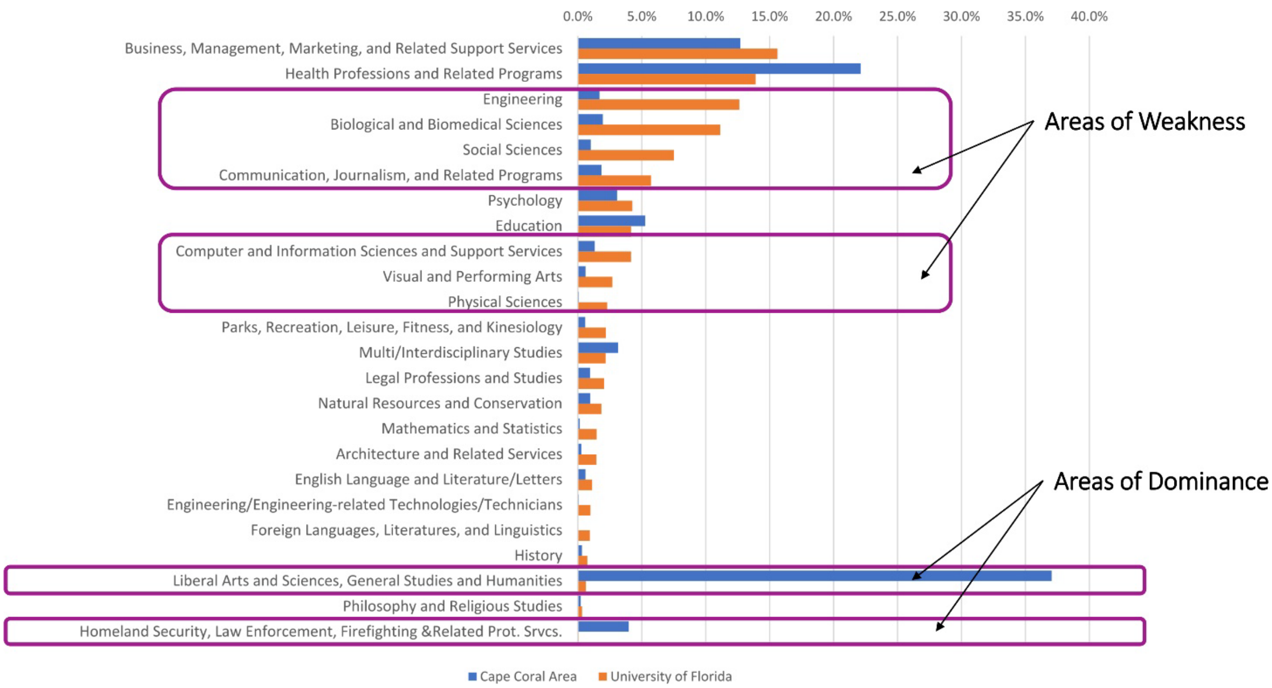
Mathematics and Statistics	12	36
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	11	38
Legal Professions and Studies	10	39
English Language and Literature/Letters	9	40
Physical Sciences	9	40
Theology and Religious Vocations	8	42
Liberal Arts and Sciences, General Studies and Humanities	8	42
Education	6	44
Engineering	6	44
History	4	46
Engineering/Engineering-related Technologies/Technicians	4	46
Engineering/Engineering-related Technologies/Technicians	3	48
Theology and Religious Vocations	2	49
Mathematics and Statistics	2	49
Foreign Languages, Literatures, and Linguistics	2	49
Total	**9,933**	
Top 10 Most popular programs/majors degrees	**8,115**	
Top 10 Most popular programs/majors degrees by %	**82%**	

Source: College Navigator – National Center for Education Statistics

Exhibit 2.5 – Cape Coral Area Schools and UFL Program/Majors Comparison				
	Cape Coral Area		UFL	
2022 Majors	Degrees	%	Degrees	%
Business, Management, Marketing, and Related Support Services	1,233	12.7%	2,398	15.6%
Health Professions and Related Programs	2,145	22.1%	2,135	13.9%
Engineering	164	1.7%	1,940	12.6%
Biological and Biomedical Sciences	189	1.9%	1,709	11.1%
Social Sciences	98	1.0%	1,154	7.5%
Communication, Journalism, and Related Programs	180	1.9%	878	5.7%
Psychology	298	3.1%	655	4.3%
Education	511	5.3%	639	4.2%
Computer and Information Sciences and Support Services	128	1.3%	638	4.2%
Visual and Performing Arts	58	0.6%	414	2.7%
Physical Sciences	9	0.1%	352	2.3%
Parks, Recreation, Leisure, Fitness, and Kinesiology	56	0.6%	337	2.2%
Multi/Interdisciplinary Studies	305	3.1%	333	2.2%
Legal Professions and Studies	93	1.0%	315	2.1%
Natural Resources and Conservation	94	1.0%	283	1.8%
Mathematics and Statistics	14	0.1%	226	1.5%
Architecture and Related Services	26	0.3%	222	1.4%
English Language and Literature/Letters	57	0.6%	171	1.1%
Engineering/Engineering-related Technologies/Technicians	7	0.1%	152	1.0%
Foreign Languages, Literatures, and Linguistics	2	0.0%	143	0.9%
History	31	0.3%	113	0.7%
Liberal Arts and Sciences, General Studies and Humanities	3,594	37.0%	97	0.6%
Philosophy and Religious Studies	22	0.2%	50	0.3%
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	387	4.0%	8	0.1%
Totals	**9,701**	**100.0%**	**15,362**	**100.0%**

Source: College Navigator – National Center for Education Statistics

Exhibit 2.6 – Comparison Chart of Cape Coral Area Graduates vs UFL by Percent



2.f – SWOT Analysis

Competitive Area Comparisons

It is important to recognize the role of competing areas when determining the Strengths, Weaknesses, Opportunities and Threats (*SWOT*) of a study area. The six competing cities to Cape Coral identified in the Task 2.d section have been compared to Cape Coral. Ranked results in each of the same 32 Econographics categories will indicate how Cape Coral fares against the competition. Tables for each of the competing Econographics Market Profiles are located in the Appendices.

Basic Location Qualifiers

As shown in the following table, wide differences prevail between Cape Coral and the competitive areas when viewed in terms of basic location qualifiers:

- In one of the six competitive areas, the population % change in growth is higher than that of Cape Coral.
- Four of the six competing areas have a larger percent of adults with college degrees.
- Two of the six competing areas have a lower cost of living index than the Cape Coral
- Four of the six competing areas have a lower median hourly wage for goods-producing workers.
- Four of the six competing areas have a greater market access based on population reached within a within a one-day delivery time (300 miles).

The table below provides a summary of these key location qualifiers as developed in the Appendices Econographics Market Profiles:

Location Qualifiers for Competitive Cities					
Competitive area	Pop. Growth 2012-2022 % Change	% College Grads	Cost of living index	Goods-Producing Workers Median Wage/hr	Market Access USA %
Cape Coral	**34.6%**	**38.9%**	**92.5**	**$29.02**	**6.2%**
Fort Lauderdale	15.9%	**61.3%**	112.2	**$22.89**	5.6%
Orlando	26.7%	**54.8%**	**93.5**	$30.50	**6.8%**
Palm Bay	24.1%	36.6%	90.0	$33.28	**6.4%**
Pompano Beach	31.6%	33.7%	110.7	**$18.61**	5.7%
Port St. Lucie	**37.4%**	**39.6%**	**90.4**	**$26.62**	**6.3%**
West Palm Beach	18.7%	**48.8%**	101.6	**$20.82**	**6.4%**

As shown in the table below, the Econographics summaries resulted in remarkable similarity and ties in scoring, with a range of a high of 59.4 (19 of 32 possible strengths) to a low of 40.6 (13 of 32 possible strengths). Cape Coral's tied place score of **53.1** (17 of 32) was at the median score of 53.1 points. By observation, the cities of Palm Bay, Pompano Beach, and West Palm Beach emerge as Cape Coral true competitors by virtue of being at or above the median Econographics score.

City	Score	Rank
Palm Bay	59.4	1
Pompano Beach	56.3	2
Cape Coral	**53.1**	**3**
West Palm Beach	53.1	3
Port St. Lucie	50.0	4
Orlando	43.8	5
Fort Lauderdale	40.6	6
Median Score	**53.1**	

Competing City Scoring Methodology

As indicated in the Appendices Econographics tables, selected key data within each topic group are utilized for scoring. In the following pages, the 32 ranking categories are revisited in more detail with Cape Coral's position shown in bold highlight. SWOT designations are determined by Cape Coral ranking position in quartiles, the 1st being the lowest and the 4th the highest overall. Narratives are provided that explain the importance of ranking position and observed recommendations. The SWOT designations are as follows:

S *Strengths* - performance worthy of continued promotion

W *Weaknesses* - deteriorated performance, with unlikely capability of correction

O *Opportunities* - emerging performance deserving of promotional development

T *Threats* - weakening performance in danger of falling into deteriorated category and requiring immediate attention

Part One – Demographics

Population Growth (#1)

Index Target ↑

Population Change 2012-2022 %	Index	Quartile	SWOT
Cape Coral	**228.2**	**4th**	**STRENGTH**
Fort Lauderdale	81.4		
Orlando	176.0		
Palm Bay	159.1		
Pompano Beach	208.6		
Port St. Lucie	246.8		
West Palm Beach	123.1		

SWOT Index Ranges		Quartile	SWOT
218.4	246.8	4th Q	Strength
176.0	218.4	3rd Q	Opportunity
141.1	176.0	2nd Q	Threat
81.4	141.1	1st Q	Weakness

Resultant

A 4th quartile ranking for this topic indicates population growth is a direct result of the appeal that Cape Coral has for new residents. This is a *Strength*.

Age and Gender (#2)

Index Target ↑

Younger Workers Age group 18-44 (2022)	Index	Quartile	SWOT
Cape Coral	**90.4**	**1st**	**WEAKNESS**
Fort Lauderdale	105.4		
Orlando	143.1		
Palm Bay	98.8		
Pompano Beach	107.8		
Port St. Lucie	91.6		
West Palm Beach	117.4		

SWOT Index Ranges		Quartile	SWOT
112.6	143.1	4th Q	Strength
105.4	112.6	3rd Q	Opportunity
95.2	105.4	2nd Q	Threat
90.4	95.2	1st Q	Weakness

Resultant

A 1st quartile ranking for this topic indicates that new business cannot yet benefit from new workers entering the labor force. Efforts should be made to retain younger families and matriculating students within the city. This is a *Weakness*.

Age and Gender (#3)

Index Target ↑

Mature Workers Age group 45-64 (2022)	Index	Quartile	SWOT
Cape Coral	**100.4**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	110.5		
Orlando	77.8		
Palm Bay	95.3		
Pompano Beach	104.7		
Port St. Lucie	106.2		
West Palm Beach	87.9		

SWOT Index Ranges		Quartile	SWOT
105.4	110.5	4th Q	Strength
100.4	105.4	3rd Q	Opportunity
91.6	100.4	2nd Q	Threat
77.8	91.6	1st Q	Weakness

Resultant

A 3rd quartile ranking for this topic reveals that mature and senior workers are available in Cape Coral. These individuals can fill needed teaching and mentoring positions for business development. This is an *Opportunity*.

Age and Gender **(#4)** Index Target

Median age (2022)	Index	Quartile	SWOT
Cape Coral	**107.3**	**1st**	**WEAKNESS**
Fort Lauderdale	100.9		
Orlando	78.8		
Palm Bay	99.1		
Pompano Beach	100.0		
Port St. Lucie	96.4		
West Palm Beach	95.1		

SWOT Index Ranges		Quartile	SWOT
95.7	78.8	4th Q	Strength
99.1	95.7	3rd Q	Opportunity
100.5	99.1	2nd Q	Threat
107.3	100.5	1st Q	Weakness

Resultant

A 1st quartile ranking for this topic reveals that other competing cities have a younger population. This is a *Weakness*.

Age and Gender **(#5)** Index Target

Male/Female ratio (2022)	Index	Quartile	SWOT
Cape Coral	**106.3**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	115.9		
Orlando	106.3		
Palm Bay	93.2		
Pompano Beach	116.5		
Port St. Lucie	102.8		
West Palm Beach	101.6		

SWOT Index Ranges		Quartile	SWOT
102.2	93.2	4th Q	Strength
106.3	102.2	3rd Q	Opportunity
111.1	106.3	2nd Q	Threat
116.5	111.1	1st Q	Weakness

Resultant

A 3rd quartile ranking for this topic indicates that the labor force can benefit from potential female workers. This is an *Opportunity.*

Racial Diversity (#6)

Index Target ↑

Total non-white/white ratio (2022)	Index	Quartile	SWOT
Cape Coral	**52.8**	**1st**	**WEAKNESS**
Fort Lauderdale	77.1		
Orlando	200.7		
Palm Bay	76.3		
Pompano Beach	170.8		
Port St. Lucie	85.1		
West Palm Beach	177.1		

SWOT Index Ranges		Quartile	SWOT
174.0	200.7	4th Q	Strength
85.1	174.0	3rd Q	Opportunity
76.7	85.1	2nd Q	Threat
52.8	76.7	1st Q	Weakness

Resultant

A 1st quartile position in this category reveals a fundamental lack of diversity which may impact the recruiting of certain industries, especially in consumer services and retail. This is a *Weakness*.

Language Competence (#7)

Index Target ↑

% English Only Spoken at home (2022)	Index	Quartile	SWOT
Cape Coral	**112.6**	**4th**	**STRENGTH**
Fort Lauderdale	102.3		
Orlando	87.2		
Palm Bay	117.9		
Pompano Beach	84.1		
Port St. Lucie	103.3		
West Palm Beach	95.6		

SWOT Index Ranges		Quartile	SWOT
108.0	117.9	4th Q	Strength
102.3	108.0	3rd Q	Opportunity
91.4	102.3	2nd Q	Threat
84.1	91.4	1st Q	Weakness

Resultant

A 4th quartile ranking for this topic indicates that new businesses will benefit from a literate workforce with adequate verbal skills. This is a *Strength*.

Households and median income (#8)

Index Target ↑

Avg. Size of Household (2022)	Index	Quartile	SWOT
Cape Coral	**105.7**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	90.7		
Orlando	92.0		
Palm Bay	115.7		
Pompano Beach	92.5		
Port St. Lucie	112.1		
West Palm Beach	93.7		

SWOT Index Ranges		Quartile	SWOT
108.9	115.7	4th Q	Strength
93.7	108.9	3rd Q	Opportunity
92.2	93.7	2nd Q	Threat
90.7	92.2	1st Q	Weakness

Resultant

A 3rd quartile ranking for this topic indicates that larger households can more effectively contribute to the labor force by the potential for more workers. This is an *Opportunity.*

Households and median income **(#9)** Index Target ↑

Median Household income (2022)	Index	Quartile	SWOT
Cape Coral	**111.1**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	117.7		
Orlando	94.3		
Palm Bay	103.4		
Pompano Beach	121.1		
Port St. Lucie	108.5		
West Palm Beach	102.6		

SWOT Index Ranges		Quartile	SWOT
114.4	121.1	4th Q	Strength
108.5	114.4	3rd Q	Opportunity
103.0	108.5	2nd Q	Threat
94.3	103.0	1st Q	Weakness

Resultant

A 3rd quartile ranking for this topic indicates that larger households can more also produce higher median incomes and buying power. This is an *Opportunity.*

Educational Attainment **(#10)** Index Target ↑

% College Grads (2022)	Index	Quartile	SWOT
Cape Coral	**87.4**	**2nd**	**THREAT**
Fort Lauderdale	137.8		
Orlando	123.1		
Palm Bay	82.2		
Pompano Beach	75.7		
Port St. Lucie	89.0		
West Palm Beach	109.7		

SWOT Index Ranges		Quartile	SWOT
116.4	137.8	4th Q	Strength
89.0	116.4	3rd Q	Opportunity
84.8	89.0	2nd Q	Threat
75.7	84.8	1st Q	Weakness

Resultant

A 2nd quartile position for Cape Coral is attributable to significantly fewer than average 4-yr. and graduate-level degree holders. For white collar industries that the city hopes to attract, this is a *Threat*.

Housing (#11) ↑ Index Target

Home Ownership Rate (2022)	Index	Quartile	SWOT
Cape Coral	**112.9**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	76.5		
Orlando	60.1		
Palm Bay	116.8		
Pompano Beach	86.6		
Port St. Lucie	125.9		
West Palm Beach	76.6		

SWOT Index Ranges		Quartile	SWOT
114.9	125.9	4th Q	Strength
86.6	114.9	3rd Q	Opportunity
76.6	86.6	2nd Q	Threat
60.1	76.6	1st Q	Weakness

Resultant

A 3rd quartile ranking for this topic indicates that Cape Coral has a moderately stable housing climate. A greater number of owned rather than rental housing units should be favored, including condominiums or townhomes. This is an *Opportunity.*

Housing (#12) ↓ Index Target

Median home value (2022)	Index	Quartile	SWOT
Cape Coral	**107.2**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	137.1		
Orlando	110.1		
Palm Bay	80.0		
Pompano Beach	96.3		
Port St. Lucie	102.9		
West Palm Beach	123.3		

SWOT Index Ranges		Quartile	SWOT
99.6	80.0	4th Q	Strength
107.2	99.6	3rd Q	Opportunity
116.7	107.2	2nd Q	Threat
137.1	116.7	1st Q	Weakness

Resultant

Cape Coral's 3rd quartile ranking in this topic indicates the relative affordability of housing. Efforts should be made to increase the number of affordable units to improve this factor. This is an *Opportunity*.

Cost of Living (#13) ↓ Index Target

Cost of living index (2021)	Index	Quartile	SWOT
Cape Coral	**90.8**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	110.1		
Orlando	91.8		
Palm Bay	88.3		
Pompano Beach	108.6		
Port St. Lucie	88.7		
West Palm Beach	99.7		

SWOT Index Ranges		Quartile	SWOT
89.7	88.3	4th Q	Strength
91.8	89.7	3rd Q	Opportunity
104.2	91.8	2nd Q	Threat
110.1	104.2	1st Q	Weakness

Resultant

A 3rd quartile ranking in this topic indicates the affordability of living in Cape Coral. Cost of living improvements such the affordability of housing and the availability of local employment should help lower costs in Cape Coral. This is an *Opportunity*.

Quality of Life **(#14)** Index Target

Crime index (2023)	Index	Quartile	SWOT
Cape Coral	**105.0**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	145.0		
Orlando	167.0		
Palm Bay	82.0		
Pompano Beach	120.0		
Port St. Lucie	90.0		
West Palm Beach	147.0		

SWOT Index Ranges		**Quartile**	**SWOT**
97.5	82.0	4th Q	Strength
120.0	97.5	3rd Q	Opportunity
146.0	120.0	2nd Q	Threat
167.0	146.0	1st Q	Weakness

Resultant

Although considered a low crime area, Cape Coral's 3rd quartile ranking in this topic indicates that there can be improvements to the crime picture. More community policing may be needed to combat a rise in non-violent crime statistics. This is an *Opportunity*.

Quality of Life **(#15)** Index Target

Physicians per 1K population (2022)	Index	Quartile	SWOT
Cape Coral	**95.8**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	104.7		
Orlando	128.9		
Palm Bay	79.3		
Pompano Beach	44.4		
Port St. Lucie	81.0		
West Palm Beach	103.5		

SWOT Index Ranges		**Quartile**	**SWOT**
104.1	128.9	4th Q	Strength
95.8	104.1	3rd Q	Opportunity
80.1	95.8	2nd Q	Threat
44.4	80.1	1st Q	Weakness

Resultant

In a second of the Quality of Life categories, the 3rd quartile position of available medical practitioners reveals a moderately efficient healthcare environment but likely requiring travel outside of the city for specialists. This is an *Opportunity.*

Quality of Life (#16)

Index Target

Arts, leisure, tourism & hospitality employ. per 1K pop. (2022)	Index	Quartile	SWOT	SWOT Index Ranges		Quartile	SWOT
Cape Coral	**98.8**	**3rd**	**OPPORTUNITY**	122.9	159.4	4th Q	Strength
Fort Lauderdale	123.0			98.8	122.9	3rd Q	Opportunity
Orlando	159.4			84.3	98.8	2nd Q	Threat
Palm Bay	72.8			70.3	84.3	1st Q	Weakness
Pompano Beach	122.7						
Port St. Lucie	70.3						
West Palm Beach	95.8						

Resultant

In this last of the three Quality of Life categories, a 3rd quartile position of arts and leisure employment reveals a moderate level of cultural drivers, driven mostly by the outdoor water-based recreational opportunities of Cape Coral. More development of the arts is needed to propel the city forward. This is still considered an *Opportunity*.

Part Two – Economics

Labor Market Status (#17)

Index Target

Labor force participation rate (2022)	Index	Quartile	SWOT	SWOT Index Ranges		Quartile	SWOT
Cape Coral	**99.5**	**1st**	**WEAKNESS**	112.2	119.2	4th Q	Strength
Fort Lauderdale	112.0			104.5	112.2	3rd Q	Opportunity
Orlando	119.2			100.1	104.5	2nd Q	Threat
Palm Bay	100.7			97.5	100.1	1st Q	Weakness
Pompano Beach	104.5						
Port St. Lucie	97.5						
West Palm Beach	112.5						

Resultant

With a labor participation rate in the Cape Coral of only 58.9%, the 1st quartile position indicates a structural flaw in employment that may be possibly only corrected by significant economic recovery. This is a *Weakness*.

Area Business Patterns (#18)

↑ Index Target

Goods/Service producing industries ratio (2022)	Index	Quartile	SWOT
Cape Coral	**121.6**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	73.7		
Orlando	73.5		
Palm Bay	140.0		
Pompano Beach	128.8		
Port St. Lucie	91.8		
West Palm Beach	115.0		

SWOT Index Ranges		Quartile	SWOT
125.2	140.0	4th Q	Strength
115.0	125.2	3rd Q	Opportunity
82.7	115.0	2nd Q	Threat
73.5	82.7	1st Q	Weakness

Resultant

With 3rd quartile rank, Cape Coral reveals good balance of Goods Producing versus Service industries, representing a moderately stable economy. Recruitment of more manufacturing to the city will improve this metric. This is an *Opportunity*.

Average Hourly Wages - Goods Producing Industries (#19)

↓ Index Target

Goods producing workers hrly wages (2022)	Index	Quartile	SWOT
Cape Coral	**119.1**	**2nd**	**THREAT**
Fort Lauderdale	93.9		
Orlando	125.1		
Palm Bay	136.5		
Pompano Beach	76.4		
Port St. Lucie	109.2		
West Palm Beach	85.4		

SWOT Index Ranges		Quartile	SWOT
89.6	76.4	4th Q	Strength
109.2	89.6	3rd Q	Opportunity
122.1	109.2	2nd Q	Threat
136.5	122.1	1st Q	Weakness

Resultant

At a 2nd quartile position, Cape Coral's goods-producing wage pattern is not attractive for new industry development. This may be corrected by younger entrants to the workforce with better training in these fields. This is a *Threat*.

Average Hourly Wages - Service Producing Industries (#20)

Service producing workers hrly wages (2022)	Index	Quartile	SWOT (Index Target)
Cape Coral	**91.3**	**4th**	**STRENGTH**
Fort Lauderdale	116.5		
Orlando	108.2		
Palm Bay	106.8		
Pompano Beach	99.3		
Port St. Lucie	95.1		
West Palm Beach	136.6		

SWOT Index Ranges		Quartile	SWOT
97.2	91.3	4th Q	Strength
106.8	97.2	3rd Q	Opportunity
112.3	106.8	2nd Q	Threat
136.6	112.3	1st Q	Weakness

Resultant

Median hourly wages for Service producing industry results in a 4th quartile position and results in a competitive advantage for Cape Coral in this category. This is a *Strength*.

Real Estate - Commercial and Industrial (#21)

Avg. Office Rent/sf (2023)	Index	Quartile	SWOT (Index Target)
Cape Coral	**84.2**	**2nd**	**THREAT**
Fort Lauderdale	113.3		
Orlando	79.1		
Palm Bay	45.5		
Pompano Beach	73.4		
Port St. Lucie	57.8		
West Palm Beach	132.2		

SWOT Index Ranges		Quartile	SWOT
65.6	45.5	4th Q	Strength
79.1	65.6	3rd Q	Opportunity
98.8	79.1	2nd Q	Threat
132.2	98.8	1st Q	Weakness

Resultant

In this first of two real estate evaluations, office space rents for Cape Coral 2nd quartile position, likely resulting from paucity of Class A office space in the market. Speculative office development may be needed to counteract this condition. Nevertheless, this is a *Threat*.

Real Estate - Commercial and Industrial (#22)

Index Target

Avg. Indus'l Rent/sf (2023)	Index	Quartile	SWOT
Cape Coral	**176.2**	**1st**	**WEAKNESS**
Fort Lauderdale	129.2		
Orlando	87.9		
Palm Bay	87.0		
Pompano Beach	156.7		
Port St. Lucie	117.3		
West Palm Beach	134.7		

SWOT Index Ranges		Quartile	SWOT
102.6	87.0	4th Q	Strength
129.2	102.6	3rd Q	Opportunity
145.7	129.2	2nd Q	Threat
176.2	145.7	1st Q	Weakness

Resultant

As with the preceding Real Estate topic, Cape Coral's 1st quartile ranking provides a trailing position in industrial rents which may keep the city from expanding its manufacturing base. This is a *Weakness*.

Real Estate - Commercial and Industrial (#23)

Index Target

Avg. Commercial/Industrial Land Price/acre (2023)	Index	Quartile	SWOT
Cape Coral	**508.8**	**3rd**	**OPPORTUNITY**
Fort Lauderdale	2479.3		
Orlando	346.6		
Palm Bay	851.8		
Pompano Beach	3567.3		
Port St. Lucie	246.3		
West Palm Beach	1682.5		

SWOT Index Ranges		Quartile	SWOT
427.7	246.3	4th Q	Strength
851.8	427.7	3rd Q	Opportunity
2080.9	851.8	2nd Q	Threat
3567.3	2080.9	1st Q	Weakness

Resultant

The 3rd quartile position of Commercial and Industrial land prices is in sharp contrast to the two preceding Real Estate topics. Offering a dramatic savings in property values may be a way to lure companies from more expensive competing locations. This results in an *Opportunity*.

Electric Rates (#24)

Index Target

Commercial electricity rate (cents/kwh) (2023)	Index	Quartile	SWOT	SWOT Index Ranges		Quartile	SWOT
Cape Coral	**79.4**	**4th**	**STRENGTH**	93.0	79.4	4th Q	Strength
Fort Lauderdale	99.5			99.5	93.0	3rd Q	Opportunity
Orlando	86.5			99.5	99.5	2nd Q	Threat
Palm Bay	99.5			100.4	99.5	1st Q	Weakness
Pompano Beach	100.4						
Port St. Lucie	99.5						
West Palm Beach	99.5						

Resultant

Cape Coral's affordable commercial electricity rate puts the city in a 4th quartile position which can be leverage in its favor for marketing. This is a *Strength*.

Electric Rates (#25)

Index Target

Industrial electricity rate (cents/kwh) (2023)	Index	Quartile	SWOT	SWOT Index Ranges		Quartile	SWOT
Cape Coral	**91.8**	**3rd**	**OPPORTUNITY**	91.8	91.5	4th Q	Strength
Fort Lauderdale	91.8			91.8	91.8	3rd Q	Opportunity
Orlando	105.3			91.8	91.8	2nd Q	Threat
Palm Bay	91.8			105.3	91.8	1st Q	Weakness
Pompano Beach	91.5						
Port St. Lucie	91.8						
West Palm Beach	91.8						

Resultant

A 3rd quartile ranking in this topic indicates that industrial power costs are within acceptable limits, but some improvement may be achieved by negotiated rates. This is an *Opportunity*.

Part Three – Market Access

Market Potential (#26)

Index Target

% of US within 300-mile radius (2023)	Index	Quartile	SWOT
Cape Coral	**87.1**	**2nd**	**THREAT**
Fort Lauderdale	79.1		
Orlando	95.8		
Palm Bay	90.3		
Pompano Beach	79.5		
Port St. Lucie	88.0		
West Palm Beach	89.6		

SWOT Index Ranges		Quartile	SWOT
90.0	95.8	4th Q	Strength
88.0	90.0	3rd Q	Opportunity
83.3	88.0	2nd Q	Threat
79.1	83.3	1st Q	Weakness

Resultant

With a 2nd quartile in percentage of the US population reachable within a 300-mile radius, Cape Coral does not feature prominently among the competing cities for the national distribution industry, likely due to the absence of direct interstate highway access. Improvements in connections to I-75 through the northern quadrants of the city may help to mitigate this. However, this is *a Threat.*

Retail Sales (#27)

Index Target

Retail sales per capita (2023)	Index	Quartile	SWOT
Cape Coral	**88.3**	**2nd**	**THREAT**
Fort Lauderdale	133.5		
Orlando	98.2		
Palm Bay	74.1		
Pompano Beach	89.4		
Port St. Lucie	80.3		
West Palm Beach	96.6		

SWOT Index Ranges		Quartile	SWOT
97.4	133.5	4th Q	Strength
89.4	97.4	3rd Q	Opportunity
84.3	89.4	2nd Q	Threat
74.1	84.3	1st Q	Weakness

Resultant

Cape Coral's 2nd quartile position in retail sales per capita indicates a significantly underperformance versus other competing areas in the category. Expansion of retail opportunities throughout the city may help this condition, But, for now, this is a *Threat*.

Worker Mobility (#28) Index Target

Mean travel time to Work - minutes (2022)	Index	Quartile	SWOT	SWOT Index Ranges		Quartile	SWOT
Cape Coral	**102.4**	**4th**	**STRENGTH**	99.5	102.4	4th Q	Strength
Fort Lauderdale	90.7			95.0	99.5	3rd Q	Opportunity
Orlando	91.8			93.2	95.0	2nd Q	Threat
Palm Bay	95.0			90.7	93.2	1st Q	Weakness
Pompano Beach	100.7						
Port St. Lucie	98.3						
West Palm Beach	94.6						

Resultant

The 4th quartile position reveals the relative mobility of the labor force. This is an attractive inducement for new companies who can easily intercept travelling workers by establishing new operations in Cape Coral and intercepting this commuting labor force. This is a *Strength*.

Worker Mobility (#29) Index Target

Commute outside place of residence (2022)	Index	Quartile	SWOT	SWOT Index Ranges		Quartile	SWOT
Cape Coral	**118.6**	**3rd**	**OPPORTUNITY**	120.4	137.4	4th Q	Strength
Fort Lauderdale	94.2			114.0	120.4	3rd Q	Opportunity
Orlando	80.1			99.9	114.0	2nd Q	Threat
Palm Bay	122.2			80.1	99.9	1st Q	Weakness
Pompano Beach	137.4						
Port St. Lucie	105.6						
West Palm Beach	114.0						

Resultant

With a high percentage In commutation patterns outside city of residence, Cape Coral once again proves its potential in capturing a mobile workforce. This is an Opportunity.

Worker Mobility (#30) Index Target

Worked from home (2022)	Index	Quartile	SWOT	SWOT Index Ranges		Quartile	SWOT
Cape Coral	**87.4**	**3rd**	**OPPORTUNITY**	81.8	72.6	4th Q	Strength
Fort Lauderdale	122.0			88.1	81.8	3rd Q	Opportunity
Orlando	104.9			100.3	88.1	2nd Q	Threat
Palm Bay	72.6			122.0	100.3	1st Q	Weakness
Pompano Beach	76.2						
Port St. Lucie	88.1						
West Palm Beach	95.7						

Resultant

As a new work paradigm, home workers are changing the business landscape. At a 3rd quartile ranking, Cape Coral's lower number of workers operating from home is another indicator of the potential to attract new employers. This is an *Opportunity*.

Worker Mobility **(#31)** Index Target

2 or more vehicles available (2022)	Index	Quartile	SWOT
Cape Coral	**108.2**	**4th**	**STRENGTH**
Fort Lauderdale	91.2		
Orlando	105.2		
Palm Bay	83.4		
Pompano Beach	89.1		
Port St. Lucie	106.8		
West Palm Beach	106.8		

SWOT Index Ranges		Quartile	SWOT
106.8	108.2	4th Q	Strength
105.2	106.8	3rd Q	Opportunity
90.1	105.2	2nd Q	Threat
83.4	90.1	1st Q	Weakness

Resultant

In this final of four Worker Mobility topics, the availability of multiple means of travelling to work puts Cape Coral in a dominant position with a 4th quartile ranking. This is a *Strength*.

Airport Access **(#32)** Index Target

Travel time to nearest major airport - minutes (2023)	Index	Quartile	SWOT
Cape Coral	**77.8**	**1st**	**WEAKNESS**
Fort Lauderdale	35.6		
Orlando	42.2		
Palm Bay	35.6		
Pompano Beach	62.2		
Port St. Lucie	106.7		
West Palm Beach	24.4		

SWOT Index Ranges		Quartile	SWOT
35.6	24.4	4th Q	Strength
42.2	35.6	3rd Q	Opportunity
70.0	42.2	2nd Q	Threat
106.7	70.0	1st Q	Weakness

Resultant

For access to a major airport, Cape Coral has reasonable proximity to Southwest Florida International Airport (RSW) but other markets have the airport within their defined areas, resulting in nearly unfair comparisons. Car-pooling or mass transit promotion (jitneys, bus services, air taxis) should be encouraged to provide more timely connectivity to RSW if possible to even the opportunities for competitions other markets are investing in light rail and other transit conveniences. This is a *Weakness*.

Econographics Rankings Summary

Through this exercise, it becomes apparent that the City of Cape Coral has difficulty in outpacing its competition for business excellence in some areas. However, cost advantages consistently emerge as a theme that will become important in bottom-line operational calculations to be performed in subsequent sections. The four SWOT resultant categories are shown in summary below:

Strengths (S)

- Population Change 2012-2022 %
- % English Only Spoken at home (2022)
- Service producing workers hourly wages (2022)
- Commercial electricity rate (cents/kwh) (2023)
- Mean travel time to Work - minutes (2022)
- 2 or more vehicles available (2022)

Weaknesses (W)

- Younger Workers Age group 18-44 (2022)
- Median age (2022)
- Total non-white/white ratio (2022)
- Labor force participation rate (2022)
- Avg. Industrial Rent/sf (2023)
- Travel time to nearest major airport - minutes (2023)

Opportunities (O)

- Mature Workers Age group 45-64 (2022)
- Male/Female ratio (2022)
- Avg. Size of Household (2022)
- Median Household income (2022)
- Home Ownership Rate (2022)
- Median home value (2022)
- Cost of living index (2021)
- Crime index (2023)
- Physicians per 1K population (2022)
- Arts, leisure, tourism & hospitality employ. per 1K pop. (2022)

- Goods/Service producing industries ratio (2022)
- Avg. Commercial/Industrial Land Price/acre (2023)
- Industrial electricity rate (cents/kwh) (2023)
- Commute outside place of residence (2022)
- Worked from home (2022)

Threats (T)

- % College Grads (2022)
- Goods producing workers hourly wages (2022)
- Avg. Office Rent/sf (2023)
- % of US within 300-mile radius (2023)
- Retail sales per capita (2023)

The ramification of these ranking summaries will be discussed in greater detail in the next section, especially the polarized nature of the results. But, City of Cape Coral does have surprising advantages against its competition in several areas that will prove attractive to potential new business development.

Collective Analysis

The four SWOT categories from the Econographics analysis indicate competitive advantages and constraints vis-à-vis specific competing markets. Utilizing this information combined with observed conditions by DCG Corplan Team personnel and the Public Survey comments, the SWOT review results in the following critical assessments for the City of Cape Coral.

Cape Coral Strengths (S)

Econographics Outcomes

- Dynamic population growth
- Literate workforce
- Low service industry wage patterns
- Cost-saving commercial electric rates
- Mobile labor force

Public Survey Comments

- Living in paradise
- Small town "feel"
- Mangroves & coastal natural resources
- Expansive water views
- Boating lifestyle
- Proximity to major urban center (Fort Myers)
- Attraction for retirees
- Cape Coral Yacht Club
- Large number of parks
- Water resources such as Bimini Basin and Rubicon Canal

DCG Corplan Team Observations

- Unique integration of land and water resources
- Waterfront location fostering watersports activities
- Subtropical climate
- Engaged and informed public
- Active real estate development environment
- Forward-thinking political leadership
- Large middle-class population
- Major waterfront development of Westin Marina Village and Cape Harbour
- Undeveloped natural coastal resources such as Redfish Point

Strengths - Summary Findings

In summary of the **24** Strengths identified above, it is on the opinion of DCG Corplan that the following are Cape Coral's most promotion-worthy Strength Categories:

1. *Dynamic growth*
2. *Civic engagement*
3. *Quality of Place*

Cape Coral Weaknesses (W)

Econographics Outcomes

- Too few younger aged workers
- Rapidly aging population
- Lack of racial/ethnic diversity
- Low labor participation rate
- High industrial rent pattern
- Excessive travel to major airport

Public Survey Comments

- Lack of beaches and public waterfront
- Distance to I-75
- Ugliness of the city
- Overdevelopment and rapid growth
- Lack of greenspace
- Destruction of mangroves and coastal resources
- Continuing post-hurricane cleanups and restorations
- Inadequate infrastructure and roadway conditions

DCG Corplan Team Observations

- Absence of interstate highway connectivity
- Heavy traffic congestions along bridge corridors
- Continuing hurricane risk
- Confusing street grid
- Suburban sprawl visual identity
- Isolated public waterfront use
- Unavailability of ocean beaches
- Lack of tourism drivers

Weaknesses - Summary Findings

In summary of the **22** Weaknesses identified above, it is on the opinion of DCG Corplan that the following are Cape Coral's most critical Weaknesses Categories*:*

1. *Environmental risk*
2. *Physical reality*
3. *Economic limitations*

Cape Coral Opportunities (O)

Econographics Outcomes

- Mature/senior workers for leadership positions
- Available female labor
- More workers per household
- Adequate household spending potential
- Stable housing economy
- Moderate crime levels
- Good quality of life drivers
- Commuting workforce capable of intercept

Public Survey Comments

- Development of affordable housing
- Increasing the tree canopy
- Exciting developments such as Seven Islands
- Family-oriented theme park
- Corporate office attraction and job creation
- Sports complex/convention center
- More facilities for youth activities

DCG Corplan Team Observations

- Available land for expansion
- Undeveloped tourism and commerce use for canal system
- Bioretention development potential for stormwater mitigation
- Environmental stewardship and resiliency leadership
- Promotion of solar and renewable energy generation

- Innovative traffic mitigation techniques such as roundabouts
- Water taxi routes implementation to Fort Myers, beaches
- Possible air taxi (VTOL) service to RSW
- Attraction of new 2-year community college or promotion of Cape Coral Technical College
- Recruitment of new hospital operator
- Eco-tourism development

Opportunity - Summary Findings

In summary of the **26** Opportunities identified above, it is on the opinion of DCG Corplan that the following are Cape Coral's most achievable Opportunity Categories:

1. *Environmental resiliency*
2. *Innovative development*
3. *Economic expansion*

Cape Coral Threats (T)

Econographics Outcomes

- Too few college graduates
- Moderately high good-producing industry wage patterns
- Moderately high office rents
- Restricted distribution capability to US market
- Low retail sales per capita

Public Survey Comments

- Apparent lack of planning in favor of expedited growth
- Excessive traffic congestion
- Unenforced traffic and cleanliness codes
- Rising cost of living
- Too many vacation rentals
- Lack of sidewalks
- Unresponsiveness of city leadership
- Overdevelopment of car washes. dollar stores, and storage facilities
- Lack of supportive infrastructure
- Limited retail choices

- Failure of city identity as a thriving waterfront community

DCG Corplan Team Observations

- Over reliance on Fort Myers for shopping and entertainment
- Lack of gateway welcoming signage or experience
- Over building of rental housing as opposed to townhomes or condominiums
- Not enough commercial office development
- Not enough industrial development
- Underdeveloped downtown urban core
- Limited retail opportunities
- Limited cultural facilities
- Limited shade tree canopy, street plantings, or street beautification
- Apparent public leadership distrust

In summary of the **26** threats noted above, it is on the opinion of DCG Corplan that the following are the most the Fulton-Montgomery County Region's most recognizable *Threat Categories*:

1. *Market timing & economy*
2. *Competition*
3. *Image*

SWOT Matrix

The analyses can be summarized through the SWOT Matrix, as shown below. The two internal values of Strengths (S) and Weaknesses (W) are compared against the two external drivers of Opportunities (O) and Threats (T):

SWOT Matrix	*Opportunities (O)*	*Threats (T)*
Strengths (S)	**S-O Strategies**	**S-T Strategies**
Weaknesses (W)	**W-O Strategies**	**W-T Strategies**

The outcome of the matrix is organized into four strategic groupings:

- S-O strategies: pursue opportunities that capitalize on strengths
- W-O strategies: overcome weaknesses to pursue opportunities

- S-T strategies: determine ways in which strengths can be used to reduce vulnerability to external threats
- W-T strategies: establish a defensive plan to prevent weaknesses from being susceptible to external threats.

Each strategic grouping is evaluated via the SWOT matrix, with the matrix nodes are as follows: 10 (Highest Correlation); 5 (Moderate Correlation); and, 1 (Minimal Correlation). The shaded entries indicate those areas that are the most critical for successful implementation of strategies and narratives summarize the scoring outcome.

Strength-Opportunities Strategies (S-O)

	Opportunities (O)		
Strengths (S)	*Environmental resiliency*	*Innovative development*	*Economic expansion*
Dynamic Growth	5	5	**10**
Civic engagement	**10**	**10**	5
Quality of Place	**10**	**10**	1

10=High Correlation; 5=Moderate Correlation; 1=Minimal Correlation

The objective is to pursue Opportunities that capitalize on Strengths. The following describes key goals that meet these criteria (correlation level 10).

- *Dynamic Growth/Economic expansion:* evaluate means of balancing housing growth with expansion in jobs and non-residential tax revenue production.

- *Civic engagement/Environmental resiliency:* establish a public forum or outreach method that educates the public on environmental sustainability programs that are achievable and practical.

- *Civic engagement/Innovative development:* establish a public forum or outreach method to discuss innovative approaches to land use that primarily serve the community.

- *Quality of Place/Environmental resiliency:* design and encourage dual-use environmental programs such as bioretention of stormwater that are both aesthetically pleasing but also functional.

- *Quality of Place/Innovative development:* develop new land use guidelines that promote innovative ideas that capitalize on Cape Coral's unique character, such as canal use.

Weaknesses-Opportunities Strategies (W-O)

	Opportunities (O)		
Weaknesses (W)	*Environmental resiliency*	*Innovative development*	*Economic expansion*
Environmental risk	**10**	**10**	**10**
Physical reality	1	5	**10**
Economic limitations	5	**10**	**10**

10=High Correlation; 5=Moderate Correlation; 1=Minimal Correlation

The objective is to overcome Weaknesses to pursue Opportunities. The following describes key goals that meet these criteria (correlation level 10).

- *Environmental risk/Environmental resiliency:* evaluate and select resiliency solutions that can address short- and long-term impacts by major weather events.

- *Environmental risk/ Innovative development:* establish guidelines for new development projects that are sustainable to wind and flood impacts and that can provide dual-purpose functionality, such as a civic center serving as a hurricane shelter.

- *Environmental risk/Economic expansion:* recruit and pursue new business attraction that is not restricted to operate in high natural hazard areas, such as certain insurance companies.

- *Physical reality/Economic expansion*: identify Cape Coral's realistic opportunity for new business attraction by evaluating industries' requirements for air, highway, water, and rail transportation services.

Strengths-Threats Strategies (S-T)

	Threats (T)		
Strengths (S)	*Market timing & Economy*	*Competition*	*Image*
Dynamic Growth	**10**	1	5
Civic engagement	**10**	**10**	**10**
Quality of Place	5	5	**10**

10=High Correlation; 5=Moderate Correlation; 1=Minimal Correlation

The objective is to determine ways in which strengths can be used to reduce vulnerability to external threats. The following describes key goals that meet these criteria.

- *Dynamic Growth/Market timing & Economy:* evaluate patterns of new population growth and entitle development of support retail and services to match growth.

- *Civic engagement /Market timing & Economy:* engage public support for new investments by demonstrating benefits to be derived locally.

- *Civic engagement /Competition:* create a public outreach to determine what retail or services categories are available in competing markets but not in Cape Coral.

- *Civic engagement /Image:* engage the public for a series of visioning sessions to identify what type of city that Cape Coral is attempting to become.

- *Quality of Place/Image:* utilize the best assets of Cape Coral, including new strategic approaches, to promote a new image for the city in marketing efforts.

Weaknesses-Threats Strategies (W-T)

	Threats (T)		
Weaknesses (W)	*Market timing & Economy*	*Competition*	*Image*
Environmental risk	**10**	1	**10**
Physical reality	5	**10**	**10**
Economic limitations	**10**	**10**	5

10=High Correlation; 5=Moderate Correlation; 1=Minimal Correlation

The objective is to establish a defensive plan to prevent weaknesses from being susceptible to external threats. The following describes strategies that meet these criteria.

- *Environmental risk/Market timing & Economy:* making informed investment decisions based on statistical probabilities of severe weather events.

- *Environmental risk/Image:* ascertain that media coverage of pre- and post-weather events are balanced and reinforce mitigation and recovery efforts.

- *Physical reality/Competition:* “best practices” review of competing areas’ overcoming of physical limitations in marketing efforts.

- *Physical reality/Image:* unbiased self-examination by leadership of Cape Coral’s assets, drawbacks, and drivers for promotion.

- *Economic limitations/Market timing & Economy:* corrective measures to be taken to reinforce workforce performance and economic development initiatives for long-term change.

- *Economic limitations/Competition:* awareness of the influence of competing cities for new business attraction and formulation of a plan to make substantive changes where possible to alter Cape Coral’s limitations.

2.g -- Progress Report/video conference

We conducted a video conference with the Project Review Committee on a joint Task 1 and Task 2 progress on October 31, 2023. Work product to date was discussed and the materials covered were previously uploaded to the website. This report's findings will be discussed with the Task 3 progress video conference. All work on Task 2 including the Task 2 Appendices have been uploaded to the website.

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Economic Development Strategic Plan - RCM2342AS

Task 3 Report

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City of Cape Coral Office of Economic and Business Development.

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February 9, 2024

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Task 3: Cluster, Location Quotient, Target Industry and Operational Analysis

3.a – Cape Coral Preliminary Target Industry Evaluation

Target Industry Research

In this section, the potential for economic advancement for the City of Cape Coral is evaluated by examination of the targeted industries for the area. The methodology for this analysis is the Location Quotients (*LQ*) tabular and charting technique. In this method, industry employment is plotted for the projected 2022-2030 period using Lee County and the State of Florida Long-Term Industry Employment projections[1].

Increases in employment are generally considered as the truest indicator of business growth, revenue gains and profitability. The analysis forecasts those industries that are present in Cape Coral and that demonstrate growth opportunity or are of such legacy value that continuing efforts for sustainability are paramount.

Location Quotients (LQ) Analysis

What is an LQ and How is it Used?

Location Quotients (LQ's) are developed by comparing the local employment concentration by industry against a larger sample, in this case the State of Florida. By example, if an industry has a local employment of 150 which might represent 5% of total the local labor market and the same industry for Florida has a 7% share of the State's total, the LQ for this industry is produced through the quotient of 5% divided by 7%, or, an LQ of 0.71.

The goal of the LQ analyses is to identify local industries that are performing at higher levels of employment concentration than their state counterparts, thereby indicating that these industries have a more important role locally than regionally. Locally strong industries are more easily promoted and reinforced by economic development initiatives and help to identify the locality's

[1] Florida Commerce Employment Projections, 203-202230; https://www.floridajobs.org/workforce-statistics/data-center/statistical-programs/employment-projections

unique characteristics. Thus, an industry of LQ greater than 1.0 (parity with State levels) reveals an indication that this industry should be considered as locally relevant.

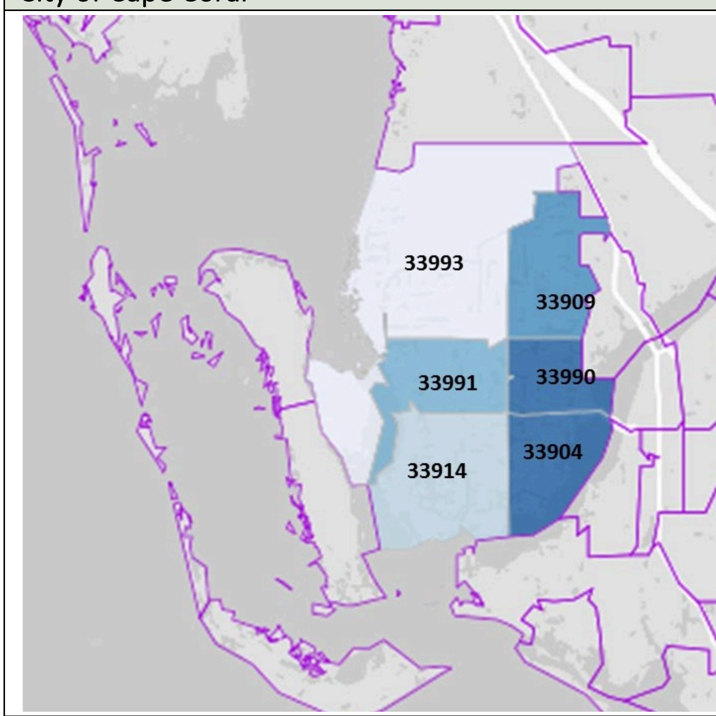
Economists consider industries with LQ's above 1.0 as those with *export* capability—the industry is producing more than is consumed locally. For industries at LQ of 1.0, demand is being met. And for industries below 1.0 LQ, industries of *import* demand – i.e., producing less than is consumed locally.

Another important element of this method is the change of LQ's over the evaluation period. Positive annual percentage gain in LQ reinforces the industry's importance; loss indicates a decline in performance. Finally, the actual number of projected employment is a key feature that when combined with the LQ time change, provides a measure of "gravity", i.e., the **LQ Impact (LQI)** factor.

How Are Industries Represented?

Industries are organized under the North American Industrial Classification System (NAICS) hierarchy. Most data is drawn from the US Census Bureau's Zip Code Business Patterns for private non-farm employment and number of establishments. Zip Code Tabulation Area (ZCTA) data is used for the six ZCTAs that comprise Cape Coral (refer to Exhibit 3.1 right):

Exhibit 3.1 – Zip Code Tabulation Areas comprising the City of Cape Coral



Source: US Census Bureau

The ZCTSS for Cape Coral are as follows:

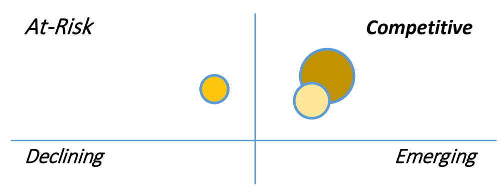
- 33904
- 33909
- 33914
- 33990
- 33991
- 33993

Added to the private non-farm data from the US Census is an estimate of current and projected agricultural, mining, utilities, and public administration employment provided by a commercial data provider (ESRI) in their Business Analyst application[2].

Employment data in NAICS is segmented into 20 super-sectors containing 79 three-digit sub-components, which represent more detailed refinements of the original 20 categories. NAICS provides industry detail down to the six-digit level covering over 800 individual industry titles. However, for purposes of this study, the three-digit level of detail is utilized. In order to streamline some of the NAICS catgeories, the following major grouping of **14** industries has been created of which all subsequent industry analyses is organized:

- Agriculture, Forestry, Fishing & Hunting
- Construction
- Education, Healthcare & Social Assistance
- Financial Activities
- Information
- Mining & Utilities
- Manufacturing
- Other Services
- Professional & Business Services
- Public Administration
- Retail Trade
- Tourism & Leisure
- Transportation & Warehousing
- Wholesale Trade

The LQ Chart



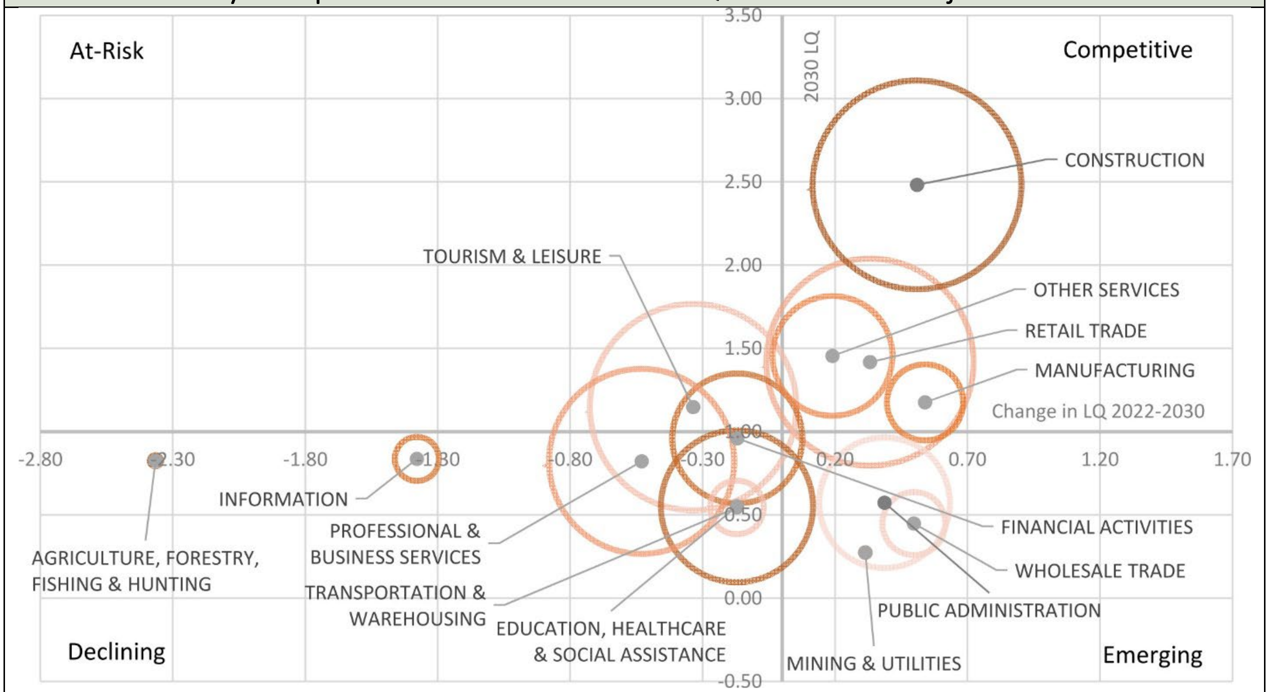
The LQ chart is an important resource as industries can be graphically represented in four quadrants. Year 2030 estimated employment by industry is shown as "bubbles"; the LQ change in the 2022-2030 period is the "X" axis; and the projected 2030 LQ is the "Y" axis. The X axis crosses the Y axis at the value of 1.0, thereby plotting the results for either success in exceeding Florida state parity or failing to meet this criterion. Each quadrant is labeled as follows: *Competitive* – dominant industries in the Region; *Emerging* – emerging industries not yet achieving critical mass; *At-Risk* – formerly strong industries (legacy) that are losing power and influence; or, *Declining* – industries that may be in danger of non-sustainability in the Region. The location of the employment "bubbles" on the chart demonstrates the industries' role for the local economy.

As shown in the Exhibit 3.2 (below) and accompanying industry detail charts (Task 3 Appendices), each of the NAICS major sectors is provided with its projected 2030 employment, the annual rate of employment growth from 2022 to 2030, the 2030 LQ, the LQ charted quadrant, and the number of anticipated jobs gained or lost in the 2022-2030 period. For each chart and associated table, the group heading is highlighted in the data and shown as a colored ring instead of a bubble on the

[2] ESRI – Business Analyst; Cape Coral, Florida, 2023

graphic. Ring positions reveal the performance of the component industries and allow for a clear understanding of the interplay of dynamic economic factors for the City of Cape Coral.

Exhibit 3.2 - City of Cape Coral Industries - Location Quotient Chart: Major Sectors 2022-2030



Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	2022-2030 Job Chnge
AGRICULTURE, FORESTRY, FISHING & HUNTING	50	-2.37	0.83	DEC	-12
CONSTRUCTION	8,001	0.51	2.48	COM	1,159
EDUCATION, HEALTHCARE & SOCIAL ASSISTANCE	4,326	-0.17	0.55	DEC	523
FINANCIAL ACTIVITIES	3,209	-0.17	0.96	DEC	236
INFORMATION	431	-1.38	0.84	DEC	-24
MINING & UTILITIES	36	0.31	0.27	EMG	2
MANUFACTURING	1,167	0.54	1.18	COM	102
OTHER SERVICES	2,749	0.19	1.45	COM	295
PROFESSIONAL & BUSINESS SERVICES	6,334	-0.53	0.82	DEC	553
PUBLIC ADMINISTRATION	3,235	0.39	0.57	EMG	285
RETAIL TRADE	7,881	0.33	1.42	COM	416
TOURISM & LEISURE	7,836	-0.34	1.15	A-R	593
TRANSPORTATION & WAREHOUSING	614	-0.17	0.55	DEC	32
WHOLESALE TRADE	824	0.50	0.45	EMG	73
Total	**46,694**			**Job Change Total**	**4,234**

Overall, employment in Cape Coral is expected to rise by **4,234** jobs from the 2022 figure of **43,460** jobs. The new figure of **46,494** jobs by 2030 is compiled through state and national projections for Florida, Lee County and calculated for Cape Coral based on projections of the 2021 US Census Zip Code Business Patterns.[3] The top five industry sectors account for **74%** of new employment, and **77%** of all new job gains. Construction employment represents the single largest employment category in the City of Cape Coral with a growth of **1,159** jobs forecasted by yr. 2030. Retail Trade and Tourism, & Leisure follow, with **416** and **593** new jobs expected, respectively. Professional & Business Services comes next, with **553** jobs forecasted. Finally, Education, Healthcare & Social Assistance rounds out the top five with **523** new jobs expected, as shown in the table below:

Industry Sector	Yr. 2030 empl.	Yr. 2030 empl. Rank	Yr. 2022-2030 Job Change.
Construction	8,001	1	1,159
Retail Trade	7,881	2	416
Tourism & Leisure	7,836	3	593
Professional & Business Services	6,334	4	553
Education, Healthcare & Social Assistance	4,326	5	523
Public Administration	3,235	6	285
Financial Activities	3,209	7	236
Other Services	2,749	8	295
Manufacturing	1,167	9	102
Wholesale Trade	824	10	73
Transportation & Warehousing	614	11	32
Information	431	12	-24
Agriculture, Forestry, Fishing & Hunting	50	13	-12
Mining & Utilities	36	14	2
Totals	**46,694**		**4,234**
Top 5 Industries total	34,378		3,244
Top 5 Industries share	74%		77%

[3] UC Census Zip Code Business Patterns; ZCTAs 33904,33909, 33990, 33991, 33993; https://data.census.gov/table/CBP2021.CB2100CBP?q=cbp&g=860XX00US33904,33909,33914,33990,33991,33993&n=N0300.00

Location Quotient Impact Factors (LQI)

Industries with large employment concentration and large LQ change produce the highest impacts and are of the most importance, both positively and negatively. Use of the LQ Impact factor (LQI) is helpful in determining the range of economic impacts. The LQI could be imagined as a ball on a string being spun in a circle. A smaller and lighter ball on a long string could equal the similar amount of force as a heaver ball on a shorter string. However, the ideal condition would be produced by a heavy ball on a long string.

When industries exhibit large LQI's, they have significant economic effects which must be considered when selecting target industries. Often, a legacy industry that is exhibiting a downward trend is critical to the local economy and negative changes in Location Quotients indicate that the industry may be losing market share or have employment issues. For economic development agencies, the focus of often limited marketing, promotion, or incentive resources may be dependent on choosing between an obvious growth industry or a legacy industry in need of assistance. Relative positions and size of employment bubbles in the chart indicate the LQI's. A formula has been produced to describe these LQ impacts:

LQI = (2030 Projected Employment *x* 2022-2030 LQ Annual Rate of Change % $x \sqrt{2030LQ}$) / 100

Exhibit 3.3 at the end of this section illustrates Cape Coral's Industries Location Quotients for the 2022-2030 projected period. LQI's for the two-digit sectors range from a high of **53.8** for Construction to a low of **-28.3** for Professional & Business Services. In recognition that both the stronger performers as well as those that require the most attention, a two-tiered target industries approach has been developed.

Tier 1 targets are those whose LQI are above the median for all positive industries, or a **1.22** LQI. The remaining industries from 0 to 1.22 LQI are important to Cape Coral but will be withheld from this part of the analysis.

Tier 2 industries are all in the negative column and fall below the median value of **-2.29** LQI. These are sectors that represent underperformance that will need to be addressed as soon as possible to avoid further deterioration. The table below indicates the distribution of the total **24** Tier 1 and Tier 2 targets:

Major Sector	Tier 1 Targets	Tier 2 Targets	**Total**
RETAIL TRADE	6	1	**7**
FINANCIAL ACTIVITIES	1	2	**3**
EDUCATION, HEALTHCARE & SOCIAL ASSISTANCE	1	2	**3**
MANUFACTURING	2		**2**
INFORMATION	1	1	**2**
PROFESSIONAL & BUSINESS SERVICES		2	**2**
OTHER SERVICES	1	1	**2**
CONSTRUCTION	1		**1**
WHOLESALE TRADE	1		**1**
PUBLIC ADMINISTRATION	**1**		**1**
Total	**15**	**9**	**24**

While these target industries have been deduced from the 3-digit NAICS structure, more detail is still necessary to formulate the approach to finalize the target industry process. Total employment is estimated at nearly **46,694** persons in the next eight years which equates to a growth rate of nearly **530** positions per year.

In the next section, Identification of Unmet Opportunities, we will examine the four-digit industries contained within these preliminary targets to arrive at a higher employment objective and the formulation of strategic industry clusters.

Summary of Preliminary Targets

Retail Trade

- Motor Vehicle & Parts Dealers *(LQI:4.12, Competitive, Tier 1)*
- Food & Beverage Stores *(LQI:5.04, Competitive, Tier 1)*
- Furniture, Home Furnishings, Electronics, and Appliance Retailers *(LQI:3.63, Competitive, Tier 1)*
- Gasoline Stations *(LQI:-7.27, At-Risk, Tier 2)*
- Clothing & Clothing Accessories Stores *(LQI:1.51, Competitive, Tier 1)*
- Sporting Goods, Hobby, Musical Instrument, & Book Stores *(LQI:27.85, Competitive, Tier 1)*

Financial Activities

- Credit Intermediation and Related Activities *(LQI:-5.66, Declining, Tier 2)*
- Securities, Commodity Contracts, and Other Financial Investments and Related Activities *(LQI:1.35, Emerging, Tier 1)*
- Real Estate *(LQI:-3.57, At-Risk, Tier 2)*
- Rental and Leasing Services *(LQI:2.54, Competitive, Tier 1)*

Education, Healthcare & Social Assistance

- Ambulatory Health Care Services *(LQI:-3.6, Declining, Tier 2)*
- Hospitals *(LQI:-4.48, Declining, Tier 2)*
- Social Assistance *(LQI:5.03, Emerging, Tier 1)*

Manufacturing

- Printing & Related Support Activities *(LQI:8.36, Competitive, Tier 1)*
- Fabricated Metal Products Mfg. *(LQI:2.74, Competitive, Tier 1)*

Information

- Publishing Industries (except Internet) *(LQI:1.28, Emerging, Tier 1)*
- Telecommunications *(LQI:-5.55, At-Risk, Tier 2)*

Professional & Business Services

- Professional, Scientific, & Technical Services *(LQI:-13.29, Declining, Tier 2)*
- Administrative and Support Services *(LQI:-15.17, Declining, Tier 2)*

Tourism & Leisure

- Food Services & Drinking Places *(LQI:-31.65, At-Risk, Tier 2)*

Other Services

- Repair and Maintenance *(LQI:4.87, Competitive, Tier 1)*

Construction

- Specialty Trade Contractors *(LQI:57.58, Competitive, Tier 1)*

Wholesale Trade

- Merchant Wholesalers, Durable Goods *(LQI:2.24, Emerging, Tier 1)*

Public Administration

Government *(LQI:8.5, Emerging, Tier 1)*

Exhibit 3.3 – Tier 1 and Tier 2 Targets by LQI									
NAICS	Description	CC 2030 Empl	CC 2022-2030 LQ Chg ARC	CC 2030 LQ	LQ Quad.	2022-2030 Job Gains	CC LQI factor	Tier 1 Targets	Tier 2 Targets
AGRICULTURE, FORESTRY, FISHING & HUNTING									
115	Support Activities for Agriculture and Forestry	50	-2.37	0.83	DEC	-12	-1.47		
MINING & UTILITIES									
212	Mining (except Oil and Gas)	16	0.87	0.96	EMG	2	0.11		
221	Utilities	21	-0.07	0.18	DEC	1	-0.01		
CONSTRUCTION									
236	Construction of Buildings	1,649	-0.08	2.60	A-R	120	-1.90		
237	Heavy and Civil Engineering Construction	442	0.00	1.08	COM	45	0.02		
238	**Specialty Trade Contractors**	**5,910**	**0.73**	**2.71**	**COM**	**994**	**57.58**	■	
MANUFACTURING									
323	**Printing & Related Support Activities**	**281**	**1.76**	**3.96**	**COM**	**25**	**8.36**	■	
332	**Fabricated Metal Prdct. Mfg.**	**295**	**1.00**	**1.31**	**COM**	**47**	**2.74**	■	
333	Machinery Mfg.	252	0.15	1.49	COM	25	0.41		
336	Transp. Equip. Mfg.	90	-1.05	0.32	DEC	2	-0.54		
337	Furniture & Related Prdct. Mfg.	17	0.59	0.24	EMG	1	0.05		
339	Misc. Mfg.	232	-0.33	1.32	A-R	2	-0.89		
WHOLESALE TRADE									
423	**Merchant Wholesalers, Durable Goods**	**498**	**0.73**	**0.50**	**EMG**	**49**	**2.24**	■	
424	Merchant Wholesalers, Nondurable Goods	271	0.19	0.38	EMG	19	0.29		
425	Wholesale Electronic Markets and Agents and Brokers	55	0.61	0.44	EMG	5	0.20		
RETAIL TRADE									
441	**Motor Vehicle & Parts Dealers**	**899**	**0.48**	**1.13**	**COM**	**85**	**4.12**	■	
444	Building Material & Garden Equipment & Supplies Dealers	668	-0.22	1.34	A-R	31	-1.65		
445	**Food & Beverage Stores**	**1,964**	**0.22**	**1.59**	**COM**	**139**	**5.04**	■	

449	**Furniture, Home Furnishings, Electronics, and Appliance Retailers**	**639**	**0.44**	**1.87**	**COM**	**19**	**3.63**	■	
455	General merchandise stores	699	0.09	0.67	EMG	28	0.50		
456	Health & Personal Care Stores	499	-0.07	1.28	A-R	0	-0.39		
457	**Gasoline Stations**	**492**	**-0.88**	**2.28**	**A-R**	**-35**	**-7.27**		□
458	**Clothing & Clothing Accessories Stores**	**441**	**0.35**	**1.05**	**COM**	**8**	**1.51**	■	
459	**Sporting Goods, Hobby, Musical Instrument, & Book Stores**	**1,580**	**1.28**	**2.54**	**COM**	**141**	**27.85**	■	
TRANSPORTATION & WAREHOUSING									
484	Truck Transportation	230	-0.27	0.65	DEC	10	-0.48		
485	Transit & Ground Passenger Transport.	75	0.95	1.12	COM	10	0.63		
487	Scenic & Sightseeing Transport.	77	-0.54	4.94	A-R	2	-0.92		
488	Support Activities for Transport.	204	-0.23	0.60	DEC	8	-0.35		
492	Couriers & Messengers	28	-0.63	0.08	DEC	2	-0.05		
INFORMATION									
511	**Publishing Industries (except Internet)**	**124**	**1.29**	**0.77**	**EMG**	**5**	**1.28**	■	
517	**Telecommunications**	**281**	**-1.55**	**1.19**	**A-R**	**-28**	**-5.55**		□
519	Other Information Services	26	-11.22	0.22	DEC	-1	-2.29		
FINANCIAL ACTIVITIES									
522	**Credit Intermediation and Related Activities**	**650**	**-0.91**	**0.75**	**DEC**	**-47**	**-5.66**		□
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	219	0.79	0.76	EMG	16	1.35	■	
524	Insurance Carriers and Related Activities	482	-0.15	0.46	DEC	28	-0.45		
531	**Real Estate**	**1,553**	**-0.19**	**1.74**	**A-R**	**165**	**-3.57**		□
532	Rental and Leasing Services	305	1.03	1.25	COM	74	2.54	■	
PROFESSIONAL & BUSINESS SERVICES									
541	**Professional, Scientific, & Tech'l Services**	**3,595**	**-0.44**	**0.90**	**DEC**	**478**	**-13.29**		□

561	**Administrative and Support Services**	**2,709**	**-0.64**	**0.76**	**DEC**	**72**	**-15.17**		☐
EDUCATION, HEALTHCARE & SOCIAL ASSISTANCE									
611	Educational Services	351	0.07	0.32	EMG	45	0.12		
621	**Ambulatory Health Care Services**	**2,301**	**-0.21**	**0.73**	**DEC**	**273**	**-3.60**		☐
622	**Hospitals**	**381**	**-2.24**	**0.21**	**DEC**	**-19**	**-4.48**		☐
623	Nursing & Resid'l Care Facilities	595	0.15	0.63	EMG	86	0.60		
TOURISM & LEISURE									
711	Performing Arts, Spectator Sports, & Related Industries	81	0.09	0.37	EMG	12	0.04		
712	Museums, Historical Sites, & Similar Institutions	159	0.53	3.30	COM	34	1.17		
713	Amusement, Gambling, & Recreation Industries	465	-0.18	0.46	DEC	30	-0.54		
721	Accommodation	164	0.62	0.16	EMG	32	0.32		
722	**Food Services & Drinking Places**	**6,967**	**-0.39**	**1.55**	**A-R**	**485**	**-31.65**		☐
OTHER SERVICES									
811	**Repair and Maintenance**	**1,036**	**0.38**	**2.10**	**COM**	**134**	**4.87**	■	
812	Personal and Laundry Services	980	0.03	1.77	COM	109	0.31		
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	733	0.15	0.87	EMG	52	0.95		
PUBLIC ADMINISTRATION									
900	**Government**	**3,235**	**0.39**	**0.57**	**EMG**	**285**	**8.50**	■	
Total		**46,694**				**4,234**			
Tier 1 Targets Median								**1.22**	
Tier 2 Targets Median									**-2.29**
Number of Tier 1 Targets								15	
Number of Tier 2 Targets									9

3.b – Identification of Unmet Opportunities

What Industries are We Missing?

In this section, the unmet potential of the City of Cape Coral is identified. The preceding Location Quotient review of existing industries analyzed business performance by employment as measured against the State of Florida in the industries currently present in Cape Coral. But what industries are not present locally?

The 15 Tier 1 and the 9 Tier 2 preliminary targets developed in Task 3.a have been identified by use of the 3-digit NAICS hierarchy. Under each of these headings are 4-, 5- and 6-digit sub-sector industries that have 2022 employment data from the US Census for the Cape Coral ZCTAs, but without any forward-looking projections. In this section, we will examine those 4-digit industries and evaluate:

1. Whether they have a LQ of 1.0 (parity with Florida) or better.
2. What level of employment should be targeted to at least bring them to the 1.0 parity.
3. Whether missing industries should be considered for targeting for the City and at what targeted employment size.

In the following pages, we examine each Major Sector grouping and their associated preliminary targets:

Retail Trade

Motor Vehicle & Parts Dealers – Competitive, Tier 1

Under the 3-Digit NAICS heading of Motor Vehicle & Parts Dealers (441), there are three 4-digit industry classifications, each of which are present in Cape Coral:

- Automobile Dealers (4411)
- Other Motor Vehicle Dealers (4412)
- Automotive Parts, Accessories, & Tire Stores (4413)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
4411	**Automobile Dealers**	**202**	**0.35**	**1.0**	**574**	**372**	**24**	**15**
4412	Other Motor Vehicle Dealers	186	1.59	--	--	--	10	--
4413	Automotive Parts, Accessories, & Tire Stores	426	1.88	--	--	--	8	--

Automobile Dealers

The Automobile Dealers category has an LQ of **.35** and with the 2022 employment figure of **202** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **372** jobs or about **15** new establishments. Typical activities include:

- Antique auto dealers
- Light utility truck dealers, new & used
- New car dealers
- Used car dealers

Other Motor Vehicle Dealers

The Other Motor Vehicle Dealers category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **10** persons. Typical retail types include:

- Aircraft dealers
- All-terrain vehicle (ATV) dealers
- Boat dealers, new and used
- Camper dealers
- Camper parts and accessories stores
- Golf cart dealers, powered
- Marine supply dealers
- Motorcycle dealers
- Motorcycle parts & accessories dealers
- Personal watercraft dealers
- Recreational vehicle (RV) dealers
- Utility trailer dealers

Automotive Parts, Accessories, & Tire Stores

The Automotive Parts, Accessories, & Tire Stores category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **8** persons. Typical retail types include:

- Auto supply stores
- Automobile parts dealers
- Batteries, automotive, dealers
- Tire dealers, automotive
- Used automotive parts stores
- Used tire dealers

- Stereo stores, automotive

Food & Beverage Stores - Competitive, Tier 1

Under the Food & Beverage Stores (445) heading, there are three 4-digit industry classifications, each of which is present in Cape Coral:

- Grocery Stores (4451)
- Specialty Food Stores (4452)
- Beer, Wine, & Liquor Stores (4453)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	Fl. Avg. Size of Estbl.	Net Estb. Gain
4451	Grocery Stores	1,646	1.24	--	--	--	31	--
4452	**Specialty Food Stores**	**85**	**0.93**	**1.0**	**91**	**6**	**7**	**1**
4453	Beer, Wine, and Liquor Stores	94	1.64	--	--	--	6	--

Grocery Stores

The Grocery Stores category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **31** persons. Typical retail types include:

- Commissaries, primarily groceries
- Convenience food stores (except those with fuel pumps)
- Delicatessens primarily retailing a range of grocery items and meats
- Grocery stores
- Supermarkets
- Vending machine merchandisers

Specialty Food Stores

The Specialty Food Stores category has an LQ of **.93** and with the 2022 employment figure of **85** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **6** jobs in the Specialty Food Stores category, or about **1** new company. As part of Specialty Food Retailers, the following industries should be considered:

- Fruit & Vegetable Retailers
- Meat Retailers
- Baked Goods Retailers
- Confectionery & Nut Retailers

- Fish & Seafood Retailers
- All Other Specialty Food Retailers

Beer, Wine, and Liquor Stores

The Beer, Wine, and Liquor Stores category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **6** persons. Typical retail types include:

- Beer stores
- Duty free liquor shops
- Liquor stores
- Wine shops

Furniture, Home Furnishings, Electronics, & Appliance Retailers -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Furniture, Home Furnishings, Electronics, & Appliance Retailers (449), there are two 4-digit industry classifications, each of which is present in Cape Coral:

- Furniture & Home Furnishings Retailers (4491)
- Electronics and Appliance Retailers (4492)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	Fl. Avg. Size of Estbl.	Net Estb. Gain
4491	Furniture and Home Furnishings Retailers	412	1.90	--	--	--	9	--
4492	Electronics & Appliance Retailers	208	1.02	--	--	--	9	--

Furniture & Home Furnishings Retailers

The Furniture & Home Furnishings Retailers category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **9** persons. Typical retail types include:

- Furniture
- Floor coverings
- Other home furnishings
- Window treatments

Electronics & Appliance Retailers

The Electronics & Appliance Retailers category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **9** persons. Typical retail types include:

- Audio equipment stores (except automotive)
- Camera shops, photographic
- Cellular telephone accessories stores
- Computer equipment stores
- Household-type appliance stores
- Music stores
- Photographic supply stores
- Sewing machine stores, household-type
- Software stores, computer
- Stereo stores (except automotive)
- Vacuum cleaner stores, household-type
- Video game software stores

Gasoline Stations – At-Risk, Tier 2

Under the Gasoline Stations (457) heading, there are two 4-digit industry classifications, one of which is present in Cape Coral:

- Gasoline Stations (4571)
- Fuel Dealers (4572)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL Avg. Size of Estbl.	Net Estb. Gain
4571	Gasoline Stations	527	1.96	--	--	--	7	--
4572	**Fuel Dealers**	**??**	**??**	**1.0**	**11**	**11**	**9**	**1**

Gasoline Stations

The Gasoline Stations category has a yr. 2022 LQ above 1.0 and does not require our focus. Average establishment size for this category is about **7** persons, with the following included:

- Gasoline stations with convenience stores
- Gasoline stations without convenience stores
- Marine service stations
- Truck stops

However, with the trend toward larger, more convenience retail-integrated gasoline stations offering electric charging stations, dining, and rest areas, this category should be a "driver" for the growing northeast and northwest areas of Cape Coral. Deeper examination of the NAICS data for gasoline stations also reveals Marine service stations as a key category for Cape Coral necessary for the large recreational boating economy.

Fuel dealers

The Fuel dealers group has no measurable employment and could be considered as "missing". To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **11** jobs or about **1** new firm. Typical establishment size is **9** persons and the type of these store in the category are as follows:

- Biodiesel
- Hydrogen
- Other emerging fuels
- Propane

Clothing & Clothing Accessories Stores – Competitive, Tier 1

Under the 3-Digit NAICS heading of Clothing & Clothing Accessories Stores (458), there are three 4-digit industry classifications, two of which are present in Cape Coral:

- Clothing Stores (4581)
- Shoe Retailers (4582)
- Jewelry, Luggage, & Leather Goods Stores (4583)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL Avg. Size of Estbl.	Net Estb. Gain
4581	**Clothing Stores**	**315**	**0.80**	**1.0**	**395**	**80**	**9**	**9**
4582	**Shoe Retailers**	**??**	**??**	**1.0**	**70**	**70**	**11**	**6**
4583	Jewelry, Luggage, & Leather Goods Stores	118	1.82	--	--	--	5	--

Clothing stores

The Clothing stores category has an LQ of **.80** and with the 2022 employment figure of **315**. To meet the 1.0 LQ threshold, we would like to see an increase in **80** jobs in this category, or about **9** new establishments.

- Apparel accessories
- Children's & infants' clothing
- men's & boys' clothing
- women's & girls' clothing
- Bridal gown shops (except custom)
- Costume stores (including theatrical)
- Furriers
- Handbags
- Hat and cap stores
- Leather coats
- Lingerie
- Maternity shops
- School uniform stores
- Sports apparel
- Swimwear
- T-shirt shops
- Uniform stores (except athletic)
- Unisex clothing stores

- Hosiery
- Jewelry stores, costume
- Western wear stores
- Wig and hairpiece stores

Shoe Retailers

The Shoe Retailers group has no measurable employment and could be considered as "missing". To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **70** jobs or about **6** new firms. Typical establishment size is **11** persons and the type of these store in the category are as follows:

- Athletic shoes (except bowling, golf, cleated)
- Children's shoes
- Orthopedic shoes

Jewelry, Luggage, & Leather Goods Stores

The Jewelry, Luggage, & Leather Goods Stores category has a yr. 2022 LQ above 1.0 and does not require our focus. Average establishment size for this category is about **5** persons, with the following included:

- Jewelry stores, precious
- Leather Goods Stores
- Luggage stores
- Watch shops

Sporting Goods, Hobby, Musical Instrument, & Book Stores -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Sporting Goods, Hobby, Musical Instrument, & Book Stores (459), there are six 4-digit industry classifications, three of which are present in Cape Coral:

- ❖ Sporting Goods, Hobby, and Musical Instrument Retailers (4591)
- ❖ Book Retailers and News Dealers (4592)
- ❖ Florists (4594)
- ❖ Office Supplies, Stationery, and Gift Retailers (4594)
- ❖ Used Merchandise Retailers (4595)
- ❖ Other Miscellaneous Retailers (4599)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL Avg. Size of Estbl.	Net Estb. Gain
4591	**Sporting Goods, Hobby, & Musical Instrument Retailers**	**??**	**??**	**1.0**	**147**	**??**	**9**	**17**
4592	**Book Retailers & News Dealers**	**??**	**??**	**1.0**	**19**	**??**	**8**	**2**
4593	**Florists**	**??**	**??**	**1.0**	**18**	**??**	**5**	**4**

4594	Office Supplies, Stationery, & Gift Retailers	191	2.14	--	--	--	8	--
4595	**Used Merchandise Stores**	**87**	**0.40**	**1.0**	**221**	**134**	**8**	**17**
4599	Other Miscellaneous Store Retailers	1,161	5.28	--	--	--	5	--

Sporting Goods, Hobby, & Musical Instrument Retailers

The Sporting Goods, Hobby, & Musical Instrument Retailers group has no reported employment and could be considered as "missing". To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **147** jobs in the category, or about **17** new firms. Typical establishment size is **9** persons and the type of these store in the category are as follows:

- Sporting goods retailers
- Hobby, Toy, and Game retailers
- Sewing, needlework, & piece goods
- Musical instrument and supplies retailers

Book Retailers & News Dealers

The Book Retailers and News Dealers group has no reported employment and could be considered as "missing". To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **19** jobs in the category, or about **2** new firms. Typical establishment size is **8** persons and the type of these store in the category are as follows:

- Book stores
- Comic bookstores
- News stands
- Religious bookstores

Florists

Florists may be considered as "missing" despite observable conditions that contradict their absence from the City. To meet the 1.0 LQ threshold, we would like to see the expansion of the industry by **18** jobs in the category, or about **4** new firms. Typical establishment size is **5** persons and the type of these store in the category are as follows:

- Flower shops, fresh

Office Supplies, Stationery, and Gift Retailers & Other Miscellaneous Retailers

The Office Supplies, Stationery, and Gift Retailers & Other Miscellaneous Retailers category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **8** persons. Typical retail types include:

- Balloon shops
- Card shops, greeting
- Christmas stores
- Collectible gift shops
- Craft (except craft supply) stores
- Curio shops
- Novelty shops
- Office supply stores
- Party goods stores
- School supply stores
- Souvenir shops
- Stationery stores

Used Merchandise Stores

The Used Merchandise Stores industry has an LQ of **.40** and with the 2022 employment figure of **87** persons, could benefit from improved performance. To meet the 1.0 LQ threshold, we would like to see an increase in **134** jobs in the Used merchandise category, or about **17** new establishments.

Some interesting retails segments are contained in the Used merchandise heading, such as:

- Antique dealers (except motor vehicles)
- Architectural salvage dealers
- Auctions, general merchandise (used
- Consignment shops, used merchandise
- Flea markets, permanent
- Furniture stores, used
- Rare manuscript stores
- Record stores, used
- Secondhand merchandise stores
- Sporting goods stores, used
- Thrift shops, used merchandise
- Used rare collectors' items (e.g., autograph, coin, card, stamps) shops

Other Miscellaneous Store Retailers

The Other Miscellaneous Store Retailers category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **5** persons. Typical retail types include:

- Art Dealers
- Art supply stores
- Batteries, except automotive, dealers
- Beer & wine making supply stores
- Cannabidiol (CBD oil) retailers
- Cemetery memorial dealers
- Cigar stores
- Closet organizer stores
- Collectors' items
- Emergency preparedness supply stores
- Fireworks shops
- Home security equipment stores
- Hot tub stores
- Janitorial equipment & supplies stores
- Manufactured (Mobile) Home Dealers
- Marijuana stores, medical
- Pet & Pet Supplies Retailers
- Swimming pool supply stores
- Trophy (shops
- Vape shops

Financial activities

Credit Intermediation & Related Activities -- Declining, Tier 2

Under the 3-Digit NAICS heading of Credit Intermediation and Related Activities (522), there are three 4-digit industry classifications, each of which are present in Cape Coral:

- Depository credit intermediation (5221)
- Nondepository credit intermediation (5222)
- Activities related to credit intermediation (5223)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5221	**Depository credit intermediation**	**324**	**0.30**	**1.0**	**1,083**	**759**	**18**	**42**
5222	**Nondepository credit intermediation**	**172**	**0.74**	**1.0**	**234**	**62**	**10**	**6**
5223	**Activities related to credit intermediation**	**201**	**0.86**	**1.0**	**233**	**32**	**9**	**3**

<u>Depository Credit Intermediation</u>

Depository credit intermediation (banking) has an LQ of **.30** and with the 2022 employment figure of **324** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **1,083** jobs in this category, or about **42** new establishments:

Under this heading are three sub-headings: Commercial banking, Credit unions, and Savings institutions. Collectively, the types of companies that Cape Coral could benefit from include:

- Branches of foreign banks
- Commercial banks
- Corporate credit unions
- Depository trust companies
- Federal and state credit unions
- Federal savings banks
- Private banks

<u>Nondepository Credit Intermediation</u>

The Nondepository Credit Intermediation category has an LQ of **.74** and with the 2022 employment figure of **172** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **234** jobs in this category, or about **6** new establishments. Activities under this heading include:

- Car title lending
- International trade financing

- Collateralized mortgage obligation
- Consumer Lending
- Credit Card Issuing
- Federal Home Loan Banks
- Federal Home Loan Mortgage Corp.
- Financing, secondary market
- International, Secondary Market
- Purchasing of accounts receivable
- Real Estate Credit
- Real estate mortgage investment conduits
- Sales Financing
- Student Loan Marketing Association (SLMA)

Activities Related to Credit Intermediation

The Activities Related to Credit Intermediation group has an LQ of **.86** and with the 2022 employment figure of **201** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **32** jobs in this category, or about **3** new establishments:

Financial services under this title include:

- Check cashing services
- Check validation services
- Clearinghouses, bank or check
- Credit card processing services
- Electronic financial payment services
- Loan servicing
- Money order issuance services
- Money transmission services
- Mortgage and Nonmortgage Loan Brokers
- Payday lending services
- Travelers' check issuance services

Securities, Commodity Contracts, and Other Financial Investments and Related Activities -- Emerging, Tier 1

Under the 3-Digit NAICS heading of Securities, Commodity Contracts, and Other Financial Investments and Related Activities (523), there are three 4-digit industry classifications, two of which are present in Cape Coral:

- Securities & commodity contracts intermediation & brokerage (5231)
- Securities & Commodity Exchanges (5232)
- Other financial investment activities (5239)

Due to the nature of major city location for stock exchanges, the Securities and Commodity Exchanges category is excluded from further consideration. For the remaining other two segments, both industries have a presence in Cape Coral. Other Financial Investment Activities

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5231	**Securities & Commodity Contracts Intermediation & Brokerage**	**30**	**0.18**	**1.0**	**170**	**140**	**8**	**18**
5239	Other Financial Investment Activities	173	1.05	--	--	--	3	--

The Other Financial Investment Activities category has an LQ above 1.0 and is not in need of direct support. Recruitment and attraction of companies in this area should be encouraged, with a typical firm size of about **3** persons. Typical activities under this heading include:

- Financial planning
- Mutual funds management
- Pension funds management
- Trusts management

Securities & Commodity Contracts Intermediation & Brokerage

The Securities and Commodity Contracts Intermediation and Brokerage group has an LQ of **.18** and with the 2022 employment figure of **30** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **140** jobs in this category, or about **18** new establishments. Activities in this category cover:

- Commodity contracts brokerages
- Cryptocurrency brokering
- Foreign currency exchange dealing
- Stock brokerages

Real Estate -- At-Risk, Tier 2

Under the 3-Digit NAICS heading of Real Estate (531), there are three 4-digit industry classifications, all of which are present in Cape Coral:

- Lessors of real estate (5311)
- Offices of real estate agents & brokers (5312)
- Activities related to real estate (5213)

Each of these classifications of industry are present in Cape Coral and two have LQ's below the 1.0 parity level:

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5311	**Lessors of Real Estate**	**202**	**0.83**	**1.0**	**241**	**39**	**5**	**8**
5312	Offices of Real Estate Agents & Brokers	746	3.38	--	--	--	2	--
5313	**Activities Related to Real Estate**	**440**	**0.88**	**1.0**	**498**	**58**	**6**	**9**

Lessors of Real Estate

Lessors of Real Estate has an LQ of **.83** and a 2022 employment figure of **202** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **39** jobs in this category, or about **8** new establishments. Leasing of real estate include:

- Mini warehouses and Self-Storage Units
- Nonresidential Buildings
- Other Real Estate Property
- Residential Buildings and Dwellings

Offices Of Real Estate Agents and Brokers

Offices Of Real Estate Agents and Brokers has a yr. 2022 of LQ of 3.38 and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **2** persons. Typical service include:

- Auctioning real estate
- Brokerages, real estate
- Buyers' agents, real estate
- Condominium time shares selling

Activities Related to Real Estate

Activities Related to Real Estate has an LQ of **.88** and with the 2022 employment figure of **440** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **58** jobs in this category, or about **9** new establishments. Activities include:

- Escrow agencies
- Property management
- Real estate appraisers
- Real estate consulting
- Real estate listing services

Education, Healthcare & Social Assistance

Ambulatory Health Care Services -- Declining, Tier 2

Under the 3-Digit NAICS heading of Ambulatory Health Care Services (621), there are seven 4-digit industry classifications, and all are present in Cape Coral:

- Offices of Physicians (6211)
- Offices of Dentists (6212)
- Offices of Other Health Practitioners (6213)
- Outpatient Care Centers (6214)
- Medical & Diagnostic Laboratories (6215)
- Home Health Care Services (6216)
- Other Ambulatory Health Care Services (6219)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
6211	**Offices of Physicians**	**761**	**0.53**	**1.0**	**1,439**	**678**	**11**	**63**
6212	**Offices of Dentists**	**363**	**0.94**	**1.0**	**385**	**22**	**7**	**3**
6213	**Offices of Other Health Practitioners**	**432**	**0.96**	**1.0**	**446**	**14**	**5**	**3**
6214	**Outpatient Care Centers**	**247**	**0.70**	**1.0**	**350**	**103**	**17**	**6**
6215	**Medical & Diagnostic Laboratories**	**72**	**0.44**	**1.0**	**164**	**92**	**12**	**7**
6216	**Home Health Care Services**	**147**	**0.33**	**1.0**	**449**	**302**	**18**	**17**
6219	**Other Ambulatory Health Care Services**	**6**	**0.05**	**1.0**	**112**	**106**	**14**	**8**

Offices of Physicians

The Offices of Physicians category has an LQ of **.53** and a 2022 employment figure of **761** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **678** jobs in this category, or about **63** new establishments. Medical activities include:

- Acupuncturists
- Allergists
- Family and general practice
- Osteopathic
- Psychiatrists
- Specialists
- Walk-in clinics

Offices of Dentists

The Offices of Dentists category has an LQ of **.94** and a 2022 employment figure of **363** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **22** jobs in this category, or about **3** new establishments. Dental activities include:

- Dental surgeons
- Endodontists
- General dentistry
- Orthodontists
- Periodontists

Offices of Other Health Practitioners

The Offices of Other Health Practitioners has an LQ of **.96** and a 2022 employment figure of **432** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **14** jobs in this category, or about **3** new establishments. Activities for this group include:

- Chiropractors
- Clinical psychologists
- Optometrist
- Psychotherapists
- Social workers, mental health

Outpatient Care Centers

The Outpatient Care Centers category has an LQ of **.70** and a 2022 employment figure of **247** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **103** jobs in this category, or about **6** new establishments. Activities for this group include:

- Biofeedback centers
- Community health centers
- Family Planning Centers
- Freestanding ambulatory, surgical & emergency Centers
- HMO Medical Centers
- Kidney Dialysis Centers
- Outpatient Mental Health & Substance Abuse
- Pain therapy centers
- Sleep disorder centers

Medical & Diagnostic Laboratories

The Medical & Diagnostic Laboratories category has an LQ of **.44** and a 2022 employment figure of **72** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **92** jobs in this category, or about **7** new establishments. Activities for this group include:

- Bacteriological laboratories
- Biological laboratories
- Magnetic resonance imaging
- Mammogram centers

- Blood analysis laboratories
- CT-SCAN centers
- Dental X-ray laboratories
- DNA testing laboratories
- Forensic laboratories
- Medical X-ray laboratories
- Mobile breast imaging centers
- Mobile X-ray facilities
- Radiological laboratories

Home Health Care Services

The Home Health Care Services category has an LQ of **.33** and a 2022 employment figure of **147** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **302** jobs in this category, or about 1**7** new establishments. Activities for this group include:

- Home health care agencies
- Home infusion therapy services
- In-home hospice care services
- Visiting nurse associations

Other Ambulatory Health Care Services

The Other Ambulatory Health Care Services category has an LQ of **.05** and a 2022 employment figure of **6** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **106** jobs in this category, or about **8** new establishments. Activities for this group include:

- Ambulance services, air
- Ambulance services, ground
- Blood banks
- Employee drug testing services
- Health screening services
- Hearing testing services
- Human egg or ova banks
- Human embryo storage services
- Medical care management services
- Organ banks, body
- Pacemaker monitoring services
- Physical fitness evaluation services
- Sperm banks, human

Hospitals -- Declining, Tier 2

Under the 3-digit NAICS heading of Hospitals (622), there are three 4-digit industry classifications:

- General Medical & Surgical Hospitals (6221)
- Psychiatric and Substance Abuse Hospitals (6222)
- Specialty (except Psychiatric and Substance Abuse) Hospitals (6223)

Only the General Medical and Surgical Hospitals category is present in Cape Coral.

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
6221	**General Medical & Surgical Hospitals**	**400**	**0.22**	**1.0**	**1,915**	**1,515**	**389**	**5**
6222	**Psychiatric & Substance Abuse Hospitals**	**??**	**??**	**1.0**	**45**	**45**	**77**	**1**
6223	**Specialty (except Psychiatric and Substance Abuse) Hospitals**	**??**	**??**	**1.0**	**83**	**83**	**62**	**1**

General Medical and Surgical Hospitals

The Offices of Dentists category has an LQ of **.22** and a 2022 employment figure of **400** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **1,515** jobs in this category, or about **5** new establishments. Hospitals include:

- Children's hospitals, general
- General medical and surgical hospitals
- Micro-hospitals
- Osteopathic hospitals

Psychiatric & Substance Abuse Hospitals

The Psychiatric and Substance Abuse Hospitals group has no reported employment and could be considered as "missing". To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **45** jobs in the category, or about **1** new facility. Typical establishment size is about **77** persons and the type of these hospitals are as follows:

- Detoxification hospitals
- Drug and Alcoholism rehabilitation
- Psychiatric Hospitals

Specialty (except Psychiatric and Substance Abuse) Hospitals

The Specialty (except Psychiatric and Substance Abuse) Hospitals group has no reported employment and could be considered as "missing". To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **83** jobs in the category, or about **1** new facility. Typical establishment size is about **62** persons and the type of these hospitals typically include:

- Cancer hospitals
- Children's hospitals, specialty
- Eye, ear, nose, & throat hospitals
- Maternity hospitals
- Physical rehabilitation hospitals

Social Assistance -- Emerging, Tier 1

Under the 3-Digit NAICS heading of Hospitals (624), there are three 4-digit industry classifications, three of which are present in Cape Coral:

- Individual & Family Services (6241)
- Community Food & Housing, & Emergency & Other Relief Services (6242)
- Vocational Rehabilitation Services (6243)
- Childcare Services (6244)

Three of the four classifications of industry are present in Cape Coral.

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
6241	**Individual & Family Services**	**196**	**0.54**	**1.0**	**366**	**170**	**4**	**42**
6242	**Community Food & Housing, & Emergency & Other Relief Services**	**6**	**0.11**	**1.0**	**56**	**50**	**14**	**3**
6243	**Vocational Rehabilitation Services**	**??**	**??**	**1.0**	**71**	**71**	**21**	**3**
6244	Childcare Services	358	1.06	--	--	--	13	--

Individual and Family Services

The Individual and Family Services category has an LQ of **.54** and a 2022 employment figure of **196** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **170** jobs in this category, or about **42** new establishments. Services typically include:

- Activity centers, disabled persons
- Adoption agencies
- Adult day care centers
- Alcoholism and drug addiction self-help
- Child welfare services
- Community action service agencies
- Community Centers, senior citizens'
- Community centers, youth
- Community health education services
- Crisis intervention centers
- Disability support groups
- Ex-offender rehabilitation agencies
- Foster care placement agencies
- Hotline centers
- Marriage counseling services
- Parenting support services
- Parole offices, privately operated
- Rape crisis centers
- Referral services for social problems
- Self-help org. for disabled persons, elderly
- Suicide crisis centers
- Teen outreach services
- Travelers' aid centers
- Welfare service centers, multi-program
- Youth self-help organizations

Community Food & Housing, & Emergency and Other Relief Services

The Community Food and Housing, and Emergency and Other Relief Services Category has an LQ of **.11** and a 2022 employment figure of **6** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **50** jobs in this category, or about **3** new establishments. Activities include:

- Disaster relief services
- Emergency shelters
- Energy assistance programs
- Food banks
- Homeless shelters
- Housing assistance agencies
- Immigrant resettlement services
- Meal delivery programs
- Mobile soup kitchens
- Volunteer housing repair organizations

Vocational Rehabilitation Services

The Vocational Rehabilitation Services group has no reported employment and could be considered as "missing". To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **71** jobs in the category, or about **3** new firms. Typical establishment size is **21** persons and the type of services in the category are as follows:

- Job counseling
- Sheltered workshops
- Vocational habilitation

Childcare Services

The Childcare Services category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **13** persons, with the following typical service offered:

- Babysitting services
- Before- and after-school educational programs
- Child day care centers
- Head Start and Early Head Start programs
- Preschool centers

Manufacturing

Printing & Related Support Activities -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Printing & Related Support Activities (323), there is only the one 4-digit industry classifications:

- Printing & Related Support Activities (3231)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
3231	Printing & Related Support Activities	256	2.65	--	--	--	8	--

The Printing & Related Support Activities category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **8** persons. Typical activities include:

- Book binding
- Book printing
- Color separation services
- Commercial screen printing
- Gold stamping books for the trade
- Imagesetting services, prepress
- Lithographic plate preparation services
- Postpress services

Fabricated Metal Products Mfg. -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Fabricated Metal Products Mfg. (332), there are nine 4-digit industry classifications:

- Forging and Stamping (3321)
- Cutlery & Handtool Manufacturing (3322)
- **Architectural & Structural Metals Manufacturing (3233)**
- Boiler, Tank, & Shipping Container Manufacturing (3324)
- Hardware Manufacturing (3325)
- Spring & Wire Product Manufacturing (3326)
- Machine Shops; Turned Product; & Screw, Nut, and Bolt Manufacturing (3327)
- Coating, Engraving, Heat Treating, & Allied Activities (3328)
- Other Fabricated Metal Product Manufacturing (3329)

The five above highlighted industries do not have presence in Lee County and are excluded from further consideration.

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
3323	Architectural and structural metals manufacturing	248	1.89	--	--	--	8	--
3327	**Machine Shops; Turned Product; & Screw, Nut, and Bolt Mfg.**	**??**	**??**	**1.0**	**30**	**30**	**10**	**3**
3328	**Coating, Engraving, Heat Treating, & Allied Activities**	**??**	**??**	**1.0**	**12**	**12**	**10**	**1**
3329	**Other Fabricated Metal Product Manufacturing**	**??**	**??**	**1.0**	**35**	**35**	**13**	**3**

Architectural and Structural Metals Manufacturing

The Architectural and Structural Metals Manufacturing has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **8** persons. Output in this category includes:

- Metal window and doors
- Ornamental & architectural metal products
- Ornamental and architectural metal work
- Plate work & fabricated structural products
- Prefabricated metal building
- Sheet metal work

Machine Shops; Turned Product; & Screw, Nut, and Bolt Mfg.

In the Machine Shops; Turned Product; and Screw, Nut, and Bolt Mfg. category, there is no reported employment in Cape Coral, making this a "missing: industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **30** jobs in the category, or about **3** new facilities. Typical establishment size is about **10** persons and the type of these hospitals typically include:

- Bolts
- Hooks
- Hose clamps
- Nuts
- Rivets
- Screws
- Screw eyes
- Turnbuckles
- Washers

Coating, Engraving, Heat Treating, & Allied Activities

In the Coating, Engraving, Heat Treating, & Allied Activities category, there is no reported employment in Cape Coral, denoting this a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **12** jobs in the category, or about **1** new facility. Typical establishment size is about **10** persons and the type of metal processes these of manufacturers include:

- Annealing
- Brazing
- Cold treating
- Tempering
- Tempering
- Engraving
- Electroplating
- Plating
- Polishing
- Anodizing
- Coloring

<u>Other Fabricated Metal Product Manufacturing</u>

In the Other Fabricated Metal Product Manufacturing category, there is no reported employment in Cape Coral, denoting this a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **35** jobs in the category, or about **3** new facilities. Typical establishment size is about **13** persons and the type of metal products by these manufacturers include:

- Ball and roller bearings
- Fabricated pipe
- Hose fittings
- Industrial valves
- Metal valves
- Misc. fabricated metal parts
- Plumbing fixture fittings
- Small arms ammunition

Information

Publishing Industries (except Internet) -- Emerging, Tier 1

Under the 3-Digit NAICS heading of Publishing Industries (except Internet) (513), there are two 4-digit industry classifications, one of which is present in Cape Coral:

- Newspaper, Periodical, Book, & Directory Publishers (5131)
- Software Publishers (5132)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5131	Newspaper, Periodical, Book, & Directory Publishers	119	2.65	--	--	--	7	--
5132	**Software Publishers**	**??**	**??**	**1.0**	**137**	**137**	**5**	**27**

Newspaper, Periodical, Book, & Directory Publishers

The Newspaper, Periodical, Book, &Directory Publishers category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **7** persons. Typical activities include:

- Advertising periodical publishers
- Agricultural magazine and periodicals
- Comic book publishers
- Internet newspaper publishing
- Magazine and periodical publishers
- Publishers, newspaper, with printing
- Radio guide publishers
- Scholarly journal publishers
- Technical magazine and periodical publishers
- Trade journal publishers

Software Publishers

In the Software Publishers area, there is no reported employment in Cape Coral, making this a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **137** jobs in the category, or about **27** new facilities. Typical establishment size is about **5** persons and the output of the industry includes:

- Applications software
- Gaming site publishers
- Mobile applications development
- Utility software

Telecommunications -- At-Risk, Tier 2

Under the 3-Digit NAICS heading of Telecommunications (517), there are three 4-digit industry classifications, one of which is present in Cape Coral:

- ❖ Wired & Wireless Telecommunications (5171)
- ❖ Satellite Telecommunications (5174)
- ❖ All Other Telecommunications (5178)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5171	Wired & Wireless Telecommunications	309	1.18	--	--	--	22	--
5174	**Satellite Telecommunications**	**??**	**??**	**1.0**	**3**	**3**	**7**	**1**
5178	**All Other Telecommunications**	**??**	**??**	**1.0**	**11**	**11**	**6**	**2**

Wired & Wireless Telecommunications

The Wired & Wireless Telecommunications category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **22** persons. Typical activities include:

- Cable program distribution operators
- Cable TV providers (except networks)
- Closed-circuit television (CCTV) services
- Long-distance telephone carriers, wired
- Satellite television distribution systems
- VoIP service providers

Satellite Telecommunications

In the Satellite Telecommunications category, there is no reported employment in Cape Coral, making this a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **3** jobs in the category, or **1** new facility. Typical establishment size is about **7** persons and the type of activities include:

- Earth stations for satellite communication carriers
- Long-distance telephone satellite communication carriers
- Resellers, satellite telecommunication
- Satellite telecommunication carriers

All Other Telecommunications

In the All Other Telecommunications category, there is no reported employment in Cape Coral, indicating this is a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **11** jobs in the category, or **2** new facilities. Typical establishment size is about **6** persons and the type of activities include:

- Internet service providers
- Online access service providers
- Satellite telemetry operations

Other Missing Information Industries

As the Information Sector is in the LQ's Declining quadrant, it is vital to bolster this industry will new job creation. While the following 4-digit Information industries did not emerge naturally from the LQ analysis, it is simply their absence from the Cape Coral market which compels us to add them here.

- ❖ Motion Picture & Video Industries (5121)

- Sound Recording Industries (5122)
- Radio & Television Broadcasting Stations (5161)
- Media Streaming Distribution Services, Social Networks, & Other Media Networks & Content Providers (5162)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5121	**Motion Picture & Video Industries**	**??**	**??**	**1.0**	**68**	**68**	**8**	**9**
5122	**Sound Recording Industries**	**??**	**??**	**1.0**	7	7	**3**	**2**
5161	**Radio & Television Broadcasting Stations**	**??**	**??**	**1.0**	**37**	**37**	**25**	**1**
5162	**Media Streaming Distribution Services, Social Networks, & Other Media Networks & Content Providers**	**??**	**??**	**1.0**	**45**	**45**	**10**	**5**

<u>Motion Picture & Video Industries</u>

In the Motion Picture & Video Industries category, there is no reported employment in Cape Coral, indicating this is a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **68** jobs in the category, or **9** new facilities. Typical establishment size is about **8** persons and the type of activities include:

- Animated cartoon production
- Commercials, television, production
- Motion picture production

- Animated cartoon production
- Commercials, television, production
- Motion picture production

<u>Sound Recording Industries</u>

In the Sound Recording Industries category, there is no reported employment in Cape Coral, making this is a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **7** jobs in the category, or **2** new facilities. Typical establishment size is about **3** persons and the type of activities include:

- Audio recording of meetings or conferences
- Audio recording postproduction services
- Audio recording restoration services
- Master recording leasing & licensing
- Music, sheet, publishers & printing combined
- Radio program recording production
- Record releasing, promoting, & distributing combined with mass duplication
- Sound recording studios

- Music copyright authorizing use
- Stock music & other audio services

Radio & Television Broadcasting Stations

In the Radio & Television Broadcasting Stations category, there is no reported employment in Cape Coral, making this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **37** jobs in the category, or **1** new facility. Typical establishment size is about **25** persons and the type of activities include:

- Advertising sales offices of independent & public radio broadcast stations
- Broadcasting stations (except exclusively on Internet), radio
- Piped-in music services, radio transmitted
- Rebroadcast radio stations
- Television broadcasting stations

Media Streaming Distribution Services, Social Networks, & Other Media Networks & Content Providers

In the Media Streaming Distribution Services, Social Networks, & Other Media Networks & Content Providers category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **45** jobs in the category, or **5** new facilities. Typical establishment size is about **10** persons & the type of activities include:

- Stand-alone streaming services
- Subscription Video on Dem& (SVOD)
- Syndicates, news
- Virtual Multichannel Video Programming
- Web broadcasting
- Wiki sites, Internet

Professional & Business Services

Professional, Scientific, & Technical Services -- Declining, Tier 2

Under the 3-Digit NAICS heading of Professional, Scientific, & Technical Services (541), there are eight 4-digit industry classifications, seven of which are present in Cape Coral.

- Legal Services (5411)
- Accounting, Tax Preparation, Bookkeeping, & Payroll Services (5412)
- Architectural, Engineering, & Related Services (5413)
- Specialized Design Services (5414)
- Computer Systems Design & Related Services (5415)

- Management, Scientific, & Technical Consulting Services (5416)
- Scientific Research & Development Services (5417)
- Advertising, Public Relations, & Related Services (5418)
- Other Professional, Scientific, & Technical Services (5419)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5411	**Legal Services**	**422**	**0.66**	**1.0**	**644**	**222**	**5**	**129**
5412	Accounting, Tax Preparation, Bookkeeping, & Payroll Services	550	1.11	--	--	--	5	--
5413	**Architectural, Engineering, & Related Services**	**387**	**0.65**	**1.0**	**593**	**206**	**8**	**76**
5414	Specialized Design Services	105	1.51	--	--	--	3	--
5415	**Computer Systems Design & Related Services**	**391**	**0.50**	**1.0**	**788**	**397**	**6**	**138**
5416	**Management, Scientific, & Technical Consulting Services**	**624**	**0.70**	**1.0**	**898**	**274**	**4**	**230**
5417	**Scientific Research & Development Services**	**--**	**--**	**1.0**	**127**	**127**	**5**	**26**
5418	**Advertising, Public Relations, & Related Services**	**133**	**0.86**	**1.0**	**155**	**22**	**10**	**16**
5419	Other Professional, Scientific, & Technical Services	505	1.37	--	--	--	5	--

Legal Services

The Legal Services category has an LQ of **.66** and a 2022 employment figure of **422** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **222** jobs in this category, or about **129** new firms. Services typically include:

- Jury consulting services
- Lawyers
- Notaries
- Paralegal services
- Process server services
- Process serving services
- Title Abstract & Settlement Offices

Accounting, Tax Preparation, Bookkeeping, & Payroll Services

The Accounting, Tax Preparation, Bookkeeping, & Payroll Services category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **5** persons. Typical activities include:

- Auditors
- Billing services
- Bookkeepers' offices
- Certified public accountants
- Income tax compilation services
- Medical coding services
- Payroll processing services

Architectural, Engineering, & Related Services

The Architectural, Engineering, & Related Services category has an LQ of **.65** and a 2022 employment figure of **387** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **206** jobs in this category, or about **76** new firms. Services typically include:

- Acoustical engineering consulting services
- Architects' offices
- Architectural consultants
- Chemical engineering services
- Civil engineering services
- Electrical engineering services
- Geophysical engineering services
- Golf course design services
- Industrial engineering services
- L&scape architects' offices
- Marine engineering services
- Mechanical engineering services
- Mining engineering services
- Petroleum engineering services
- Robotics automation engineering services
- Traffic engineering consulting services
- Urban planning services

Specialized Design Services

The Specialized Design Services category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **3** persons. Typical activities include:

- Graphic Design Services
- Industrial Design Services
- Interior Design Services

Computer Systems Design & Related Services

The Computer Systems Design & Related Services category has an LQ of **.50** and a 2022 employment figure of **391** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **397** jobs in this category, or about **138** new firms. Services typically include:

- Applications software programming
- Industrial robot automation applications
- Machine vision software design
- Search engine optimization (SEO) services
- CAM (computer-aided manufacturing) systems
- Local area network (LAN) computer systems
- Network systems integration design services
- Systems integration design services

- Web page design services, custom
- CAD (computer-aided design) systems
- CAE (computer-aided engineering) systems
- Computer disaster recovery services
- Software installation services

Management, Scientific, & Technical Consulting Services

The Management, Scientific, & Technical Consulting Services has an LQ of **.70** and a 2022 employment figure of **624** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **274** jobs in this category, or about **230** new firms. Services typically include:

- Economic consulting services
- Energy consulting services
- Environmental Consulting
- Human Resources Consulting
- Management Consulting
- Marketing Consulting
- Other technical consulting services
- Process, Physical Distribution, & Logistics Consulting

Scientific Research & Development Services

In the Scientific Research & Development Services category, there is no reported employment in Cape Coral, indicating this is a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **127** jobs in the category, or **26** new facilities. Typical establishment size is about **5** persons & the type of activities include:

- Aerospace R & D
- Agriculture R & D
- Artificial intelligence R & D
- Behavioral R & D
- Biotechnology R & D
- Economic R & D
- Electronic R & D
- Environmental R & D
- Nanotechnology R & D
- Robotics R & D
- Social Sciences R & D
- Veterinary R & D

Advertising, Public Relations, & Related Services

The Advertising, Public Relations, & Related Services category has an LQ of **.86** and a 2022 employment figure of **133** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **22** jobs in this category, or about **16** new firms. Services typically include:

- Advertising Agencies
- Advertising Material Distribution Services
- Advertising specialties
- Demonstration services, merchandise
- Direct Mail Advertising
- Indoor & Outdoor Display Advertising
- Media Buying Agencies
- Media Representatives
- Public Relations Agencies
- Sign lettering & painting services
- Window dressing or trimming services

Other Professional, Scientific, & Technical Services

The Other Professional, Scientific, & Technical Services category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **5** persons. Major activities include:

- Business brokers
- Commercial Photography
- Construction estimation services
- Consumer credit counseling services
- Fire extinguisher testing
- Handwriting analysis services
- Marine surveyor
- Marketing Research & Public Opinion
- Meteorological services
- Photography Studios, Portrait
- Pipeline inspection
- Quantity surveyor services
- Translation & Interpretation Services
- Veterinary Services

Administrative & Support Services -- Declining, Tier 2

Under the 3-Digit NAICS heading of Administrative & Support Services (541), there are seven 4-digit industry classifications, six of which have presence in Cape Coral.

- ❖ Office Administrative Services (5611)
- ❖ Facilities Support Services (5612)
- ❖ Employment Services (5613)
- ❖ Business Support Services (5614)
- ❖ Investigation & Security Services (5616)
- ❖ Services to Buildings & Dwellings (5617)
- ❖ Other Support Services (5619)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5611	**Office Administrative Services**	**230**	**0.81**	**1.0**	**283**	**53**	**6**	**10**
5612	**Facilities Support Services**	**??**	**??**	**1.0**	**73**	**73**	**30**	**2**
5613	**Employment Services**	**103**	**0.07**	**1.0**	**1,579**	**1,476**	**14**	**103**
5614	**Business Support Services**	**118**	**0.25**	**1.0**	**477**	**359**	**12**	**29**
5616	**Investigation & Security Services**	**309**	**0.68**	**1.0**	**451**	**142**	**18**	**8**
5617	Services to Buildings & Dwellings	1,867	1.67	--	--	--	7	--
5619	**Other Support Services**	**10**	**0.11**	**1.0**	**93**	**83**	**8**	**11**

Office Administrative Services

The Office Administrative Services category has an LQ of **.81** and a 2022 employment figure of **230** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **53** jobs in this category, or about **10** new firms. Services typically include:

- Business management services
- Hotel management services
- Industrial management services
- Medical office management services

Facilities Support Services

In the Facilities Support Services category, there is no reported employment in Cape Coral, indicating this is a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **73** jobs in the category, or **2** new facilities. Typical establishment size is about **30** persons and the type of activities include:

- Base facilities operation support
- Correctional facility operation

Employment Services

The Employment Services category has an LQ of **.07** and a 2022 employment figure of **103** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **1,476** jobs in this category, or about **103** new firms. Services typically include:

- Babysitting bureaus
- Casting agencies
- Chauffeur registries
- Contract staffing services
- Employee leasing services
- Employment agencies
- Executive placement services
- Internet job listing services
- Maid registries
- Manpower pools
- Model registries
- Nurse registries
- Office supply pools
- Professional employer org. (PEO)s)
- Referral agencies
- Ship crew registries
- State operated services offices
- Temporary help services

Business Support Services

The Business Support Services_category has an LQ of **.25** and a 2022 employment figure of **118** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **359** jobs in this category, or about **29** new firms. Services typically include:

- Account collection services
- Adjustment agencies
- Blueprinting services
- Business service centers
- Copy centers
- Desktop publishing services
- Dictation services
- Document transcription services
- Emergency telephone dispatch
- Mailbox rental centers, private
- Message services
- Parcel mailing services
- Proofreading services
- Secretarial services
- Tax collection services
- Technical editing services
- Telephone call centers
- Typing services

Investigation & Security Services

The Investigation & Security Services category has an LQ of **.68** and a 2022 employment figure of **309** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **142** jobs in this category, or about **8** new firms. Services typically include:

- Alarm system monitoring services
- Alarm systems sales
- Background check services
- Bounty hunting services
- Detective agencies
- Fingerprint services
- Guard dog services
- Lie detection services
- Locksmith services
- Parking security services
- Patrol services, security
- Protection services

Services to Buildings & Dwellings

The Services to Buildings & Dwellings category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **7** persons. Major activities include:

- Building exterior cleaning services
- Building gas systems conversion
- Carpet & Upholstery Cleaning
- Chimney cleaning services
- Drain cleaning services
- Drain cleaning services
- Exterminating & Pest Control Services
- Gutter cleaning services
- Janitorial Services
- Landscaping Service
- Swimming pool cleaning
- Ventilation duct cleaning services

Other Support Services

The Other Support Services category has an LQ of **.11** and a 2022 employment figure of **10** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **83** jobs in this category, or about **11** new firms. Services typically include:

- Auctioneers
- Bottle exchanges
- Convention & Trade Show Organizers
- Coupon redemption services
- Diving services
- Document shredding services
- Lumber grading services
- Packaging & Labeling Services
- Printing brokers
- Private volunteer firefighting
- Trading stamp redemption services
- Underground utility locating services
- Water softening services

Tourism & Leisure

Food Services & Drinking Places -- At-Risk, Tier 2

Under the 3-Digit NAICS heading of Food Services & Drinking Places (722), there are three 4-digit industry classifications, all of which are present in Cape Coral.

- Special Food Services (7223)
- Drinking Places (Alcoholic Beverages) (7224)
- Restaurants & Other Eating Places (7225)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
7223	**Special Food Services**	**110**	**0.48**	**1.0**	**227**	**117**	**9**	**12**
7224	Drinking Places (Alcoholic Beverages)	167	1.05	--	--	--	13	--
7225	Restaurants & Other Eating Places	6,205	1.39	--	--	--	19	--

Special Food Services

The Special Food Services category has an LQ of **.48** and a 2022 employment figure of **110** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **117** jobs in this category, or about **12** new firms. Services typically include:

- Airline food services
- Bartender services
- Cafeteria food services
- Catering services
- Food carts & trucks, mobile
- Food concessions
- Ice cream truck vendors
- Lunch wagons
- Refreshment stands, mobile

Drinking Places (Alcoholic Beverages)

The Drinking Places (Alcoholic Beverages) category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **13** persons. Typical facilities include:

- Bars
- Brew pubs
- Nightclubs

Restaurants & Other Eating Places

The Restaurants & Other Eating Places category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **19** persons. Typical facilities include:

- Bagel shops
- Carryout restaurants
- Delicatessens
- Diners, full service
- Doughnut shops
- Drive-in restaurants
- Frozen yogurt shops
- Full-service restaurants
- Ice cream parlors
- Juice bars
- Pizzerias
- Pretzel shops
- Snack bars
- Steak houses

Other Services

Repair & Maintenance -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Repair & Maintenance (811), there are four 4-digit industry classifications, three of which are present in Cape Coral.

- Automotive Repair & Maintenance (8111)
- Electronic & Precision Equipment Repair & Maintenance (8112)
- Commercial & Industrial Machinery & Equipment (except Automotive & Electronic) Repair & Maintenance (8113)
- Personal & Household Goods Repair & Maintenance (8114)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
8111	Automotive Repair & Maintenance	743	2.14	--	--	--	5	--
8112	**Electronic & Precision Equipment Repair & Maintenance**	**8**	**0.16**	**1.0**	**51**	**43**	**5**	**8**
8113	**Commercial & Industrial Machinery & Equipment (Except Automotive & Electronic) Repair & Maintenance**	**??**	**??**	**1.0**	**54**	**54**	**7**	**8**
8114	Personal & Household Goods Repair & Maintenance	151	2.37	**--**	--	**--**	**3**	**--**

Automotive Repair & Maintenance

The Automotive Repair & Maintenance category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **5** persons. Typical facilities include:

- Automotive air-conditioning repair shops
- Body Shops
- Car Washes
- Diagnostic centers
- General Automotive Repair
- Glass Replacement Shops
- Oil Change and Lubrication Shops
- safety inspection services
- Specialized Automotive Repair
- Tire repair shops
- Undercoating shops

Electronic & Precision Equipment Repair & Maintenance

The Electronic & Precision Equipment Repair & Maintenance category has an LQ of **.16** and a 2022 employment figure of **8** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **43** jobs in this category, or about **8** new firms. Services typically include:

- Broadcast equipment repair
- Camera repair
- Cellular telephone repair
- Communication equipment repair
- Computer peripheral equipment repair
- Dental equipment repair
- Measuring instrument repair
- Medical and surgical equipment repair
- Navigational instruments repair
- Stereo equipment repair
- Television repair services
- Typewriter repair

- Diagnostic imaging equipment repair
- Weighing equipment repair

Commercial & Industrial Machinery & Equipment (Except Automotive & Electronic) Repair & Maintenance

In the Commercial & Industrial Machinery & Equipment (Except Automotive & Electronic) Repair & Maintenance category, there is no reported employment in Cape Coral, indicating this is a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **54** jobs in the category, or **8** new facilities. Typical establishment size is about **7** persons and the type of activities include:

- Agricultural machinery & equip. repair
- Blade sharpening
- Cargo container repair and maintenance
- Commercial refrig. equip. & repair
- Constr. machinery and equip. & repair
- Electric motor repair & maint. services
- Fire extinguisher repair and maintenance
- Machine tools repair & maintenance
- Printing trade machinery repair & maint.
- Restaurant fryer equip. cleaning services
- Welding repair services

Personal & Household Goods Repair & Maintenance

The Personal & Household Goods Repair & Maintenance category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **3** persons. Typical facilities include:

- Appliance Repair & Maintenance
- Bicycle repair & maintenance shops
- Footwear & Leather Goods Repair
- Fur garment repair shops
- Gun repair & maintenance shops
- Home & Garden Equip.
- Jewelry repair shops
- Key duplicating shops
- Motorboat repair & maintenance
- Motorcycle repair shops
- Pleasure boat maintenance services
- Reupholstery & Furniture Repair
- Sporting equip. repair & maintenance
- Tailor shops
- Window shade repair

Construction

Specialty Trade Contractors -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Specialty Trade Contractors (238), there are four 4-digit industry classifications, all of which are present in Cape Coral.

- Foundation, structure, and building exterior contractors (2381)
- Building equipment contractors (2382)
- Building finishing contractors (2383)
- Other specialty trade contractors (2389)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
2381	Foundation, Structure, & Building Exterior Contractors	862	1.48	--	--	--	8	--
2382	Building Equipment Contractors	1,959	1.91	--	--	--	10	--
2383	Building Finishing Contractors	1,223	2.85	--	--	--	4	--
2389	Other Specialty Trade Contractors	872	2.79	--	--	--	7	--

Foundation, Structure, & Building Exterior Contractors

The Foundation, Structure, & Building Exterior Contractors category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **8** persons. Typical facilities include:

- Awning installation
- Concrete form contractors
- Epoxy application contractors
- Framing Contractors
- Glass and Glazing Contractors
- Masonry Contractors
- Metal furring contractors
- Ornamental metal work installation
- Poured Concrete Foundation & Structure
- Roofing Contractors
- Shutter installation
- Siding Contractors
- Stairway, metal, installation
- Structural Steel and Precast Concrete
- Welding, on-site, contractors

Building Equipment Contractors

The Building Equipment Contractors category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **10** persons. Typical facilities include:

- Commercial kitchen equipment
- Duct insulation installation
- Electrical Contractors
- Elevator & Conveyor systems installation
- Garage doors
- Lightning protection equipment
- Machine rigging
- Pipe, duct and boiler insulation
- Plumbing, Heating, and Air-Conditioning
- Satellite dish, household-type, installation
- Vault, safe and banking
- Vehicle lift installation

Building Finishing Contractors

The Building Finishing Contractors category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **4** persons. Typical facilities include:

- Building fixture and fitting
- Drywall and Insulation
- Finish Carpentry
- Flooring
- Foundation damp proofing
- Laboratory furniture & equip.
- Modular furniture systems
- Building fixture and fitting
- Painting and Wall Covering
- Partition, moveable
- Shelving, metal
- Spectator seating installation
- Tile and Terrazzo
- Window shade and blind installation
- Painting and Wall Covering

Other Specialty Trade Contractors

The Other Specialty Trade Contractors category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **7** persons. Typical facilities include:

- Billboard erection
- Blasting, building demolition
- Building interior gutting and stripping
- Crane rental with operator
- Demolition, building and structure
- Dewatering contractors
- Driveway paving or sealing
- Equipment rental
- Exterior demolition contractors
- Interior demolition
- Manufactured home set up and tie-down
- Outdoor swimming pools
- Paver, brick installation
- Paving, residential and commercial
- Sandblasting building exteriors
- Scaffold erecting and dismantling
- Septic system contractors
- Steeplejack work

- Fence installation
- Foundation drilling contractors
- Grading construction sites
- Billboard erection
- Trenching (except underwater)
- Underground tank removal
- Wrecking, building or other structure

Wholesale Trade

Merchant Wholesalers, Durable Goods -- Emerging, Tier 1

Under the 3-Digit NAICS heading of Specialty Trade Contractors (238), there are nine 4-digit industry classifications, six of which are present in Cape Coral.

- Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers
- Furniture & Home Furnishing Merchant Wholesalers
- Lumber & Other Construction Materials Merchant Wholesalers
- Professional & Commercial Equipment & Supplies Merchant Wholesalers
- Metal & Mineral (Except Petroleum) Merchant Wholesalers
- Household Appliances & Electrical & Electronic Goods Merchant Wholesalers
- Hardware, Plumbing & Heating Equipment & Supplies Merchant Wholesalers
- Machinery, Equipment, & Supplies Merchant Wholesalers
- Miscellaneous Durable Goods Merchant Wholesalers

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
4231	**Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers**	**??**	**??**	**1.0**	**88**	**88**	**10**	**9**
4232	Furniture & Home Furnishing Merchant Wholesalers	56	1.36	--	--	--	7	--
4233	**Lumber & Other Construction Materials Merchant Wholesalers**	**40**	**0.37**	**1.0**	**109**	**69**	**10**	**7**
4234	**Professional & Commercial Equipment & Supplies Merchant Wholesalers**	**56**	**0.17**	**1.0**	**325**	**269**	**10**	**26**
4235	**Metal & Mineral (Except Petroleum) Merchant Wholesalers**	**??**	**??**	**1.0**	**25**	**25**	**7**	**3**
4236	**Household Appliances & Electrical & Electronic Goods Merchant Wholesalers**	**99**	**0.70**	**1.0**	**141**	**42**	**8**	**5**

4237	**Hardware, Plumbing & Heating Equipment & Supplies Merchant Wholesalers**	80	0.64	1.0	124	44	11	4
4238	**Machinery, Equipment, & Supplies Merchant Wholesalers**	118	0.57	1.0	207	89	8	12
4239	**Miscellaneous Durable Goods Merchant Wholesalers**	??	??	1.0	98	98	5	19

Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers

In the Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers category, there is no reported employment in Cape Coral, indicating this is a "missing" industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **88** jobs in the category, or **9** new facilities. Typical establishment size is about **10** persons and the type of products include:

- All-terrain vehicles
- Ambulances
- Automobiles
- Bicycles, motorized
- Buses
- Camping trailers
- Cargo vans
- Recreational vehicles
- Sport utility vehicles
- Taxicabs
- Tractors, highway
- Used cars
- Utility trailer

Furniture & Home Furnishing Merchant Wholesalers

The Furniture & Home Furnishing Merchant Wholesalers category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **7** persons. Typical products include:

- Antique furniture
- Baby furniture
- Bathroom accessories
- Beds
- Blankets
- Blinds and shades
- Brooms and brushes
- Carpet
- Ceramic wall and floor tile
- Chinaware
- Closet accessories
- Glassware
- Hotel furniture
- Household-type furniture
- Lighting fixtures
- Linens
- Mattresses
- Mirrors
- Mops
- Office furniture
- Outdoor furniture
- Public building furniture

- Containers, household
- Cooking utensils
- Cups, plastics
- Draperies
- Frames and pictures
- Furniture parts
- Religious furniture
- Restaurant furniture
- School furniture
- Store furniture
- Tableware
- Theater seats

Lumber & Other Construction Materials Merchant Wholesalers

The Lumber & Other Construction Materials Merchant Wholesalers category has an LQ of **.37** and a 2022 employment figure of **40** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **69** jobs in this category, or about **7** new firms. Typical products include:

- Awnings
- Brick, Stone, & Related Materials
- Ceiling tile
- Countertops
- Culvert pipe, metal and plastics
- Fencing and fencing accessories
- Flat glass
- Lumber, Plywood, Millwork
- Ornamental ironwork
- Prefabricated buildings
- Roofing, Siding, & Insulation
- Septic tanks
- Silt fence and other fabrics
- Storage bins

Professional & Commercial Equipment & Supplies Merchant Wholesalers

The Professional & Commercial Equipment & Supplies Merchant Wholesalers category has an LQ of **.17** and a 2022 employment figure of **56** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **269** jobs in this category, or about **26** new firms. Services typically include:

- Balances and scales
- Church supplies
- Coin /card-operated merch. machines
- Commercial chinaware
- Commercial cooking equipment
- Commercial shelving
- Computer & peripheral equipment
- Drafting tables and instruments
- Electrical signs
- Laboratory equipment
- Medical, dental, and hospital equipment
- Office equipment
- Ophthalmic goods
- Partitions
- Photographic equipment and supplies
- School equipment and supplies
- Scientific instruments
- Store fixtures
- Surveying equipment and supplies

Metal & Mineral (Except Petroleum) Merchant Wholesalers

In the Metal & Mineral (Except Petroleum) Merchant Wholesalers category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **25** jobs in the category, or **3** new facilities. Typical establishment size is about **7** persons and the type of products include:

- Cast iron pipe
- Metal ingots
- Metal ores
- Metal pipe
- Metal plates
- Metal rods, bars and sheets
- Metal spikes
- Metallic concentrates
- Nails
- Noninsulated wire
- Nonmetallic minerals
- Precious metal ores

Household Appliances & Electrical & Electronic Goods Merchant Wholesalers

The Household Appliances & Electrical & Electronic Goods Merchant Wholesalers category has an LQ of **.70** and a 2022 employment figure of **99** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **42** jobs in this category, or about **5** new firms. Products typically include:

- Alarm apparatus
- Amplifiers, audio
- Antennas
- Batteries
- Blank compact discs
- Boxes and fittings
- Broadcasting equipment
- Capacitors, electronic
- Carbon monoxide detectors
- Cellular telephones
- Circuit boards
- Coils, electronic
- Communications equipment
- Computer chips
- Fastening devices, electrical
- Fittings, electrical
- Generators
- Household Appliances
- Insulated wire or cable
- Modems and routers
- Motors, electric
- Natural gas detectors
- Navigational instruments
- Radar equipment
- Radar equipment
- Radio parts and accessories
- Relays
- Security systems
- Signal systems
- Solar cells
- Switchboards
- Switches, electronic
- Telephone equipment
- Touch-screen displays
- Transmission equipment
- Wiring supplies

Hardware, Plumbing & Heating Equipment & Supplies Merchant Wholesalers

The Hardware, Plumbing & Heating Equipment & Supplies Merchant Wholesalers category has an LQ of **.64** and a 2022 employment figure of **80** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **44** jobs in this category, or about **4** new firms. Products typically include:

- Air-conditioning equipment
- Bathtubs
- Heat pumps
- Humidifiers and dehumidifiers

- Beverage coolers, mechanical
- Boilers
- Brads
- Burners, fuel oil
- Cold storage machinery
- Cutlery
- Display cases, refrigerated
- Drinking fountains
- Dust collection equipment
- Fasteners
- Fireplaces, gas
- Freezers, commercial-type
- Furnaces, warm air
- Handtools
- Ice making machines
- Keys and locks
- Plumbing supplies
- Power handtools
- Radiators
- Sheet metal duct work
- Sinks
- Spa equipment
- Staples
- Tacks
- Toilet bowls
- Urinals
- Ventilating equipment
- Water heaters, gas and electric

Machinery, Equipment, & Supplies Merchant Wholesalers

The Machinery, Equipment, & Supplies Merchant Wholesalers category has an LQ of **.57** and a 2022 employment figure of **118** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **89** jobs in this category, or about **12** new firms. Products typically include:

- Aircraft
- Amusement park equip.
- Animal feeders
- Beauty parlor equip. & supplies
- Boats (except pleasure)
- Car wash equip. & supplies
- Drycleaning equip. & supplies
- Excavating machinery & equip.
- Fluid power transmission equip.
- Food processing machinery & equip.
- Forestry machinery & equip.
- Harvesting machinery & equip.
- Industrial containers
- Industrial diamonds
- Industrial sand
- Janitorial equip. & supplies
- Lawnmowers
- Material handling machinery & equip.
- Metalworking machinery & equip.
- Milking machinery & equip.
- Motorized passenger golf carts
- Oil well machinery & equip.
- Planting machinery & equip.
- Printing inks
- Railroad cars
- Refractory materials
- Road const.& maint. machinery
- Scaffolding
- Ships
- Undertakers' equip. & supplies
- Upholsterers' equip. & supplies
- Voting machines
- Water treatment equip.
- Welding supplies

Miscellaneous Durable Goods Merchant Wholesalers

In the Miscellaneous Durable Goods Merchant Wholesalers category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **98** jobs in the category, or **19** new facilities. Typical establishment size is about **5** persons and the type of products include:

- Antique jewelry
- Athletic goods
- Athletic uniforms
- Boats, pleasure
- Camping equipment
- Casino supplies
- Clocks
- Coins
- Costume jewelry
- Firearms (except sporting)
- Gemstones
- Gymnasium equipment
- Ingots, precious
- Luggage merchant wholesalers
- Marine supplies
- Monuments and grave markers
- Musical instruments
- Personal safety devices and supplies
- Playground equipment
- Prerecorded electronic media
- Recyclable materials
- Signs (except electrical)
- Silverware
- Sporting and recreational goods
- Swimming pools and equipment
- Timber and timber products
- Toy and hobby goods
- Trophies
- Watchcases
- Watches and parts

Public Administration

Government -- Emerging, Tier 1

Under the 3-Digit NAICS heading of Public Administration (900), there are three classifications of government employment:

- Federal government
- State government
- Local government

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
9100	**Federal Government**	**167***	**0.19***	**1.0**	**880**	**713**	**--**	**--**
9200	**State Government**	**328***	**0.28***	**1.0**	**1,207**	**879**	**--**	**--**
9300	**Local Government**	**2,455***	**0.57***	**1.0**	**4,499**	**2,044**	**--**	**--**

Federal Government

The Federal Government category has an LQ of **.19** (**estimated*) and a 2022 employment (**estimated*) figure of **167** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **713** jobs in this category.

State Government

The State Government category has an LQ of **.28** (**estimated*) and 2022 employment (**estimated*) figure of **328** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **879** jobs in this category.

Local Government

The Local Government category has an LQ of **.57** (**estimated*) and 2022 employment (**estimated*) figure of **2,455** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **2,044** jobs in this category.

Estimates have been derived by applying the Lee County ratios of Federal, State, and Local government employment to the Cape Coral 2022 figure of 2,950 persons.

There are no breakdowns by the US Census or Bureau of Labor Statistics on employment by National, State or Local government. However, the following categories are listed by the Census as belonging to Public Administration:

- Agricultural Marketing & Commodities
- Air and Water Resource and Solid Waste Mgmnt. Programs
- Communications, Electric, Gas, and Other Utilities
- Conservation Programs
- Correctional Institutions
- Courts
- Education Programs
- Executive & Legislative Offices, Combined
- Executive Offices
- Fire Protection
- General Economic Programs
- Housing Programs
- Human Resource Programs
- International Affairs
- Legal Counsel & Prosecution
- Legislative Bodies
- National Security
- Other General Government Support
- Other Justice, Public Order, & Safety Activities
- Parole Offices & Probation Offices
- Police Protection
- Public Finance Activities
- Public Health Programs
- Regulation, Licensing, & Inspection of Misc. Commercial Sectors
- Space Research & Technology
- Transportation Programs
- Urban Planning and Community & Rural Development
- Veterans' Affairs

Summary of Preliminary Target Industries

From the above analysis, a total of **65** 4-digit NAICS industries have emerged as preliminary targets for Cape Coral in **11** major industry sectors. These industries represent the areas where the City should focus its marketing efforts as new opportunities for economic growth and expansion. The following table summarizes the research:

Retail Trade		Potential Empl. Gain
4411	Automobile Dealers	372
4452	Specialty Food Stores	6
4572	Fuel Dealers	11
4581	Clothing Stores	80
4582	Shoe Retailers	70
4591	Sporting Goods, Hobby, And Musical Instrument Retailers	147
4592	Book Retailers & News Dealers	19
4593	Florists	18
4595	Used Merchandise Stores	134
Subtotal		**857**

Financial Activities		
5221	Depository Credit Intermediation	759
5222	Nondepository Credit Intermediation	62
5223	Activities Related to Credit Intermediation	32
5231	Securities And Commodity Contracts Intermediation & Brokerage	140
5311	Lessors Of Real Estate	39
5313	Activities Related to Real Estate	58
5321	Automotive Equipment Rental & Leasing	49
Subtotal		**1,139**

Education, Healthcare & Social Services		
6211	Offices of Physicians	678
6212	Offices of Dentists	22
6213	Offices of Other Health Practitioners	14
6214	Outpatient Care Centers	103
6215	Medical & Diagnostic Laboratories	92
6216	Home Health Care Services	302
6219	Other Ambulatory Health Care Services	106
6221	General Medical & Surgical Hospitals	1,515
6222	Psychiatric & Substance Abuse Hospitals	45
6223	Specialty (Except Psychiatric & Substance Abuse) Hospitals	83
6241	Individual & Family Services	170
6242	Community Food & Housing, & Emergency & Other Relief Services	50

6243	Vocational Rehabilitation Services	71
Subtotal		**3,251**

Manufacturing

3327	Machine Shops; Turned Product; & Screw, Nut, & Bolt Mfg.	30
3328	Coating, Engraving, Heat Treating, & Allied Activities	12
3329	Other Fabricated Metal Product Manufacturing	35
Subtotal		**77**

Information

5121	Motion Picture & Video Industries	68
5122	Sound Recording Industries	7
5132	Software Publishers	137
5161	Radio & Television Broadcasting Stations	37
5162	Media Streaming Distribution Services, Social Networks, & Other Media Networks & Content Providers	45
5174	Satellite Telecommunications	3
5178	All Other Telecommunications	11
Subtotal		**308**

Professional & Business Services

5411	Legal Services	222
5413	Architectural, Engineering, & Related Services	206
5415	Computer Systems Design & Related Services	397
5416	Management, Scientific, & Technical Consulting Services	274
5417	Scientific Research & Development Services	127
5418	Advertising, Public Relations, & Related Services	22
5611	Office Administrative Services	53
5612	Facilities Support Services	73
5613	Employment Services	1,476
5614	Business Support Services	359
5616	Investigation & Security Services	142
5619	Other Support Services	83
Subtotal		**3,434**

Tourism & Leisure

7223	Special Food Services	117
Subtotal		**117**

Other Services

8112	Electronic & Precision Equipment Repair & Maintenance	43

8113	Commercial & Industrial Machinery & Equipment (Except Automotive & Electronic) Repair & Maintenance	54
Subtotal		**97**

Wholesale Trade

4231	Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers	88
4233	Lumber & Other Construction Materials Merchant Wholesalers	69
4234	Professional & Commercial Equipment & Supplies Merchant Wholesalers	269
4235	Metal & Mineral (Except Petroleum) Merchant Wholesalers	25
4236	Household Appliances & Electrical & Electronic Goods Merchant Wholesalers	42
4237	Hardware, Plumbing & Heating Equipment & Supplies Merchant Wholesalers	44
4238	Machinery, Equipment, & Supplies Merchant Wholesalers	89
4239	Miscellaneous Durable Goods Merchant Wholesalers	98
Subtotal		**724**

Public Administration

9100	Federal Government	713
9200	State Government	879
9300	Local Government	2,044
Subtotal		**3,636**

*Note: Construction sector is eliminated

In total, these industries represent a potential employment gain of **13,640** new jobs, if even the LQ parity level of 1.0 is achieved for each category. Effective economic development applied in the attraction and recruitment of new companies in these areas should provide even greater employment results.

3.c – Cluster Mapping

Clusters Identification

As defined by Harvard University, "a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support[4]."

DCG Corplan has developed a "mapping" technique whereby the 302 national industries in 4-digit NAICS format can be distilled to 27 cluster categories (channels) created from a "best practices" review of multiple cluster analyses from other US communities and states, cluster mapping white papers for the US Dept. of Commerce, the US Cluster Mapping Project from Harvard University, and primary-related industry taxonomies from numerous commercial enterprises. The clusters and the number of their corresponding 4-digit NAICS industries included in each category are shown in Exhibit 3.4 (below) and Appendix Exhibit 3.15 (multiple application occurs in many instances resulting in 350 matches):

Exhibit 3.4 – US Cluster Mapping by Number of Matched 4-digit NAICS Industries

Cluster	# of Industries
Agriculture	21
Automotive	10
Aviation / Aerospace	4
Business Services	16
Chemicals	7
Computers & Electronic Equipment	5
Construction Services & Materials	28
Consumer Products	23
Consumer Services	13
Education	7
Energy & Utilities	13
Environmental Services	3
Financial Services	13
Food & Beverages	16
Health Care & Social Services	19

[4] Dr. Michael Porter, Harvard Business School – US Cluster Mapping Project; https://clustermapping.us/

HQ & Management Operations	3
Industrial Products	35
Information & Media	12
Leisure & Tourism	15
Life Sciences	4
Metals & Mining	17
Not -For-Profits	5
Public Administration	3
Real Estate	3
Retail - Clothing & General Merchandise	18
Telecom Services & Equipment	4
Transportation	33
Total Number of Industry Matches	**350**

Utilizing the US Cluster Mapping methodology, Cape Coral's 65 4-digit target industries have been matched to **20** of the 27 cluster categories. The following table and Exhibit 3.5 (following) summarize the distribution of employment among the 20 cluster and the total potential employment gain of **13,929** jobs (*note: some industry repeats occur which raises the job gain from 13,640 to 13,929*).

Cluster	Potential Empl. Gain
Automotive	460
Business Services	2,578
Computers & Electronic Equipment	440
Construction Services & Materials	310
Consumer Products	453
Consumer Services	49
Energy & Utilities	11
Financial Services	993
Food & Beverages	6
Health Care & Social Services	3,251
HQ & Management Operations	126
Industrial Products	220
Information & Media	316
Leisure & Tourism	117
Life Sciences	219
Metals & Mining	25
Public Administration	3,636
Real Estate	97
Retail - Clothing & General Merchandise	608

Telecom Services & Equipment	14
Total	**13,929**

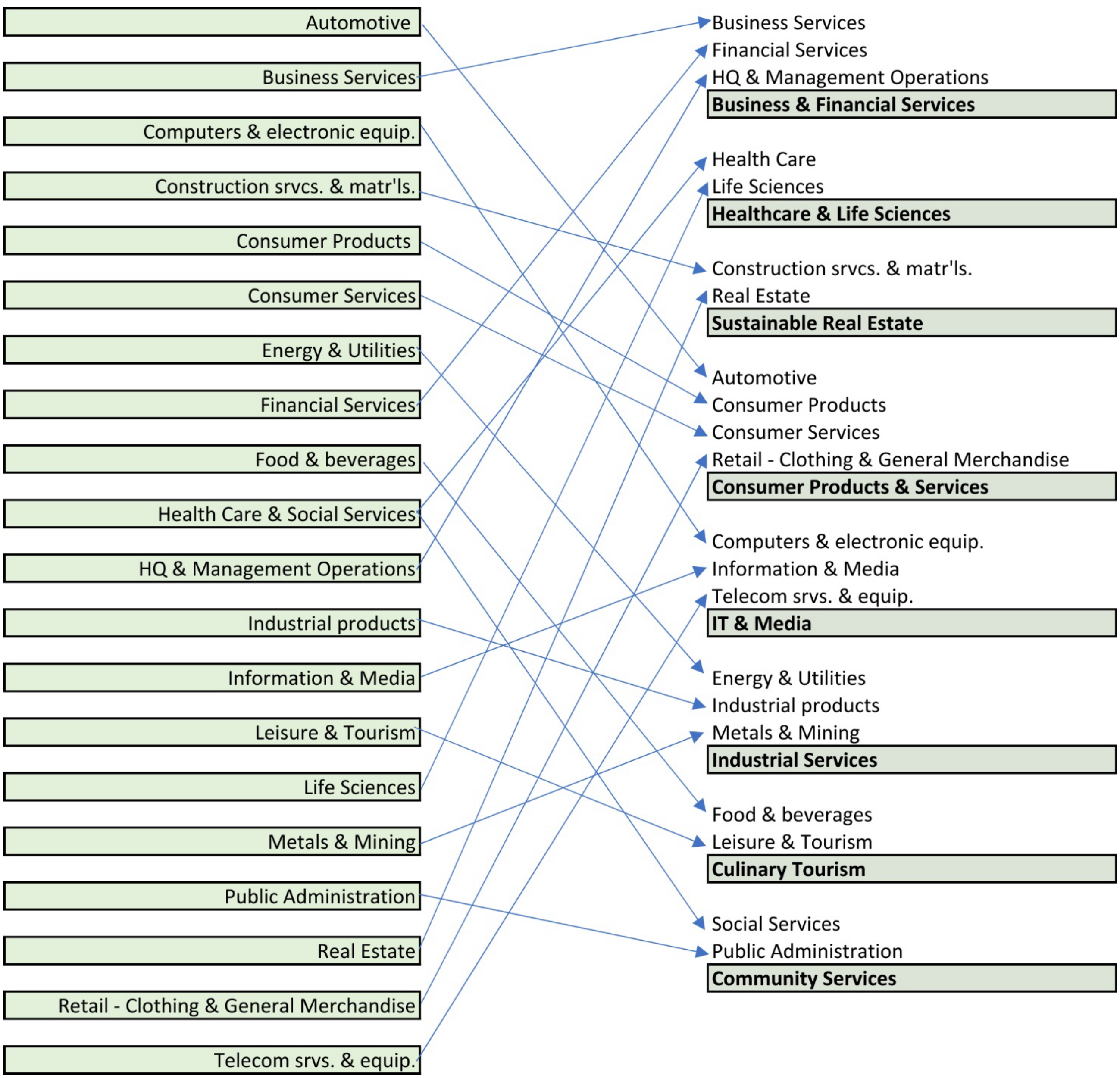
Exhibit 3.5 – Cape Coral Target Clusters and Component Industries		
NAICS	Industry	Pot'l. Emp. Gain
Automotive		
4231	Motor vehicle and motor vehicle parts and supplies merchant wholesalers	88
4411	Automobile dealers	372
	Subtotal	**460**
Business Services		
5411	Legal services	222
5416	Management, scientific, and technical consulting services	274
5418	Advertising, public relations, and related services	22
5613	Employment services	1,476
5614	Business support services	359
5616	Investigation and security services	142
5619	Other support services	83
	Subtotal	**2,578**
Computers & Electronic Equipment		
5415	Computer systems design and related services	397
8112	Electronic and precision equipment repair and maintenance	43
	Subtotal	**440**
Construction Services & Materials		
3329	Other fabricated metal product manufacturing	35
4233	Lumber and other construction materials merchant wholesalers	69
5413	Architectural, engineering, and related services	206
	Subtotal	**310**
Consumer Products		
4234	Professional and commercial equipment and supplies merchant wholesalers	269
4236	Household appliances and electrical and electronic goods merchant wholesalers	42
4237	Hardware, and plumbing and heating equipment and supplies merchant wholesalers	44
4239	Miscellaneous durable goods merchant wholesalers	98
	Subtotal	**453**
Consumer Services		
5321	Automotive equipment rental and leasing	49
	Subtotal	**49**
Energy & Utilities		
4572	Fuel dealers	11
	Subtotal	**11**
Financial Services		
5221	Depository credit intermediation	759
5222	Nondepository credit intermediation	62

5223	Activities related to credit intermediation	32
5231	Securities and commodity contracts intermediation and brokerage	140
	Subtotal	**993**
Food & Beverages		
4452	Specialty food retailers	6
	Subtotal	**6**
Health Care & Social Services		
6211	Offices of physicians	678
6212	Offices of dentists	22
6213	Offices of other health practitioners	14
6214	Outpatient care centers	103
6215	Medical and diagnostic laboratories	92
6216	Home health care services	302
6219	Other ambulatory health care services	106
6221	General medical and surgical hospitals	1,515
6222	Psychiatric and substance abuse hospitals	45
6223	Specialty (except psychiatric and substance abuse) hospitals	83
6241	Individual and family services	170
6242	Community food and housing, and emergency and other relief services	50
6243	Vocational rehabilitation services	71
	Subtotal	**3,251**
HQ & Management Operations		
5611	Office administrative services	53
5612	Facilities support services	73
	Subtotal	**126**
Industrial products		
3327	Machine shops; turned product; and screw, nut, and bolt manufacturing	30
3328	Coating, engraving, heat treating, and allied activities	12
3329	Other fabricated metal product manufacturing	35
4238	Machinery, equipment, and supplies merchant wholesalers	89
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	54
	Subtotal	**220**
Information & Media		
5121	Motion picture and video industries	68
5122	Sound recording industries	7
5132	Software publishers	137
5161	Radio and television broadcasting stations	37
5162	Media streaming distribution services, social networks, and other media networks and content providers	45
5418	Advertising, public relations, and related services	22
	Subtotal	**316**

Leisure & Tourism		
7223	Special food services	117
	Subtotal	**117**
Life Sciences		
5417	Scientific research and development services	127
6215	Medical and diagnostic laboratories	92
	Subtotal	**219**
Metals & Mining		
4235	Metal and mineral (except petroleum) merchant wholesalers	25
	Subtotal	**25**
Public Administration		
9100	Federal Government	713
9200	State Government	879
9300	Local Government	2,044
	Subtotal	**3,636**
Real Estate		
5311	Lessors of real estate	39
5313	Activities related to real estate	58
	Subtotal	**97**
Retail - Clothing & General Merchandise		
4236	Household appliances and electrical and electronic goods merchant wholesalers	42
4239	Miscellaneous durable goods merchant wholesalers	98
4581	Clothing and clothing accessories retailers	80
4582	Shoe retailers	70
4591	Sporting goods, hobby, and musical instrument retailers	147
4592	Book retailers and news dealers	19
4593	Florists	18
4595	Used merchandise retailers	134
	Subtotal	**608**
Telecom Services & Equipment		
5174	Satellite telecommunications	3
5178	All other telecommunications	11
	Subtotal	**14**

Final Cluster Selections

To determine the final cluster selections, a reexamination of the clusters identified to date is required. The following “crosswalk” graphic Illustrates how rearrangement of the components leads to a logical selection of the final clusters:



For the final eight clusters, the 4-digit target industries are presented again in the table below, organized by cluster heading (note: no industry repeats occur in these groupings):

Business & Financial Services		
5221	Depository credit intermediation	759
5222	Nondepository credit intermediation	62
5223	Activities related to credit intermediation	32
5231	Securities and commodity contracts intermediation and brokerage	140
5411	Legal services	222
5416	Management, scientific, and technical consulting services	274
5611	Office administrative services	53
5612	Facilities support services	73
5613	Employment services	1,476
5614	Business support services	359
5616	Investigation and security services	142
5619	Other support services	83
	Subtotal	**3,675**
Healthcare & Life Sciences		
5417	Scientific research and development services	127
6211	Offices of physicians	678
6212	Offices of dentists	22
6213	Offices of other health practitioners	14
6214	Outpatient care centers	103
6215	Medical and diagnostic laboratories	92
6216	Home health care services	302
6219	Other ambulatory health care services	106
6221	General medical and surgical hospitals	1,515
6222	Psychiatric and substance abuse hospitals	45
6223	Specialty (except psychiatric and substance abuse) hospitals	83
	Subtotal	**3,087**
Sustainable Real Estate		
4233	Lumber and other construction materials merchant wholesalers	69
5311	Lessors of real estate	39
5313	Activities related to real estate	58
5413	Architectural, engineering, and related services	206
	Subtotal	**372**
Consumer Products & Services		
4231	Motor vehicle and motor vehicle parts and supplies merchant wholesalers	88
4234	Professional and commercial equipment and supplies merchant wholesalers	269
4236	Household appliances and electrical and electronic goods merchant wholesalers	42

4237	Hardware, and plumbing and heating equipment and supplies merchant wholesalers	44
4239	Miscellaneous durable goods merchant wholesalers	98
4411	Automobile dealers	372
4581	Clothing and clothing accessories retailers	80
4582	Shoe retailers	70
4591	Sporting goods, hobby, and musical instrument retailers	147
4592	Book retailers and news dealers	19
4593	Florists	18
4595	Used merchandise retailers	134
5321	Automotive equipment rental and leasing	49
	Subtotal	**1,430**
IT & Media		
5121	Motion picture and video industries	68
5122	Sound recording industries	7
5132	Software publishers	137
5161	Radio and television broadcasting stations	37
5162	Media streaming distribution services, social networks, and other media networks and content providers	45
5174	Satellite telecommunications	3
5178	All other telecommunications	11
5415	Computer systems design and related services	397
5418	Advertising, public relations, and related services	22
8112	Electronic and precision equipment repair and maintenance	43
	Subtotal	**770**
Industrial Services		
3327	Machine shops; turned product; and screw, nut, and bolt manufacturing	30
3328	Coating, engraving, heat treating, and allied activities	12
3329	Other fabricated metal product manufacturing	35
4235	Metal and mineral (except petroleum) merchant wholesalers	25
4238	Machinery, equipment, and supplies merchant wholesalers	89
4572	Fuel dealers	11
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	54
	Subtotal	**256**
Culinary Tourism		
4452	Specialty food retailers	6
7223	Special food services	117
	Subtotal	**123**
Community Services		
6241	Individual and family services	170

6242	Community food and housing, and emergency and other relief services	50
6243	Vocational rehabilitation services	71
9100	Federal Government	713
9200	State Government	879
9300	Local Government	2,044
	Subtotal	**3,927**
	Total	**13,640**

As a means of determining a strategic approach toward target industry recruitment and attraction, the eight Cape Coral clusters are ranked by potential job gains as shown below. The four leading categories account for nearly 90% of all future employment growth and should become the focus of economic development initiatives going forward:

Cluster		**Pot'l. Emp. Gain**
Community Services		3,927
Business & Financial Services		3,675
Healthcare & Life Sciences		3,378
Consumer Products & Services		1,430
IT & Media		770
Sustainable Real Estate		372
Industrial Services		256
Culinary Tourism		123
Total		**13,640**
	median	**1,100**
	Leading clusters emp.	**12,119**
	Leading clusters emp. %	**89%**

3.d – Operational Analysis

The operational models presented in the following section provide a roadmap for creating a marketing opportunity for the City of Cape Coral to prospective employers. In summary, the four leading cluster representative industries could generate nearly **$84 million** in new investment.

For typical company operations, we have selected business in each of the four clusters as indicative of the category. These are as follows:

- Business & Financial Services cluster: **Business-to-business call center**
- Healthcare & Life Sciences: **Medical laboratory**
- Consumer Products & Services cluster: **Photographic & computer equipment wholesale**
- Community Services cluster: **Florda State agency**

The following table summarizes the data evaluated in the operational models:

Cluster	Selected Component Industry	Selected Detailed Industry	Total New Jobs	Annual Output per Employee	Investment per Employee	Total Investment	Industry Profitability (Cape Coral)
Business & Financial Services	Business Support Services	Business-Business Call Center	359	$113,000	$30,200	$10,841,800	7.9%
Healthcare & Life Sciences	Medical & Diagnostic Laboratories	Medical Laboratory	92	$238,000	$323,600	$29,771,200	6.6%
Consumer Products & Services	Miscellaneous Durable Goods Merchant Wholesalers	Photographic & Computer Equipment Wholesale	98	$946,000	$167,200	$16,386,000	11.7%
Community Services	State Government	Vocational Rehabilitation Services Agency	879	115400	$30,700	$26,985,300	3.9%
					Total Investment	**$83,984,300**	

Business & Financial Services Cluster: Business-to-Business Call Center

In development of the Business & Financial Services Cluster, a projection of **3,675** new employees in **12** NAICS four-digit industries classifications weas established:

Business & Financial Services Cluster

NAICS	Industry	# of New Jobs
5221	Depository credit intermediation	759
5222	Nondepository credit intermediation	62
5223	Activities related to credit intermediation	32
5231	Securities and commodity contracts intermediation and brokerage	140
5411	Legal services	222
5416	Management, scientific, and technical consulting services	274
5611	Office administrative services	53
5612	Facilities support services	73
5613	Employment services	1,476
5614	Business support services	359
5616	Investigation and security services	142
5619	Other support services	83
	Subtotal	

For exploratory purposes, we have selected **NAICS 5614 - Business Support Services** for deeper examination. For this industry category, we projected the growth of **359** new jobs. Within this heading are **6** sub-categories of industries (NAICS 5-digit), one of which we will explore in greater detail.

- Document Preparation Services
- Telephone Call Centers
- Business Service Centers
- Collection Agencies
- Credit Bureaus
- Other Business Support Services

561422 – Business-to-Business (B2B) Telephone Call Centers

This U.S. industry comprises establishments primarily engaged in operating call centers that initiate or receive communications via telephone, facsimile, email, or other communication modes for purposes such as: (1) promoting products or services, (2) taking orders, (3) soliciting contributions, and (4) providing information or assistance regarding products or services. Telemarketing bureaus and other contact centers provide these services on behalf of clients and do not own the products or provide the services that they are representing, or they serve other establishments of the same enterprise.

Profitability Determination

The national average size for a Business-to-Business (B2B) Call Center typical facility is **36** persons, and the State of Florida's is **50** persons. A nominal (averaged) facility size of **43** persons is selected as a Cape Coral model for this industry. Average productivity output for NAICS 5614 - Business Support Services is **$113,000** per employee. Total investment per employee is estimated at **$30,200**, and with the projected gain of **359** new jobs in the industry in Cape Coral, this category could produce an investment of total of **$10,841,800** for the City.

Typical B2B Call Center Facility	
Annual Net sales	$4,859,000
Total Employment	43
Avg. hourly Wage	$22.08
Fringe benefits Percentage	35%
Total Payroll	$2,665,600
Facility Footprint sq. ft.	7,711
Employee Occupancy/sf	180
Floor-Area-Ratio	0.37
Facility Construction Cost/sq. ft.	$119
Facility Construction Cost	$920,000
Estimated Furniture, Fixtures & Equipment Cost	$240,000
Site Acreage	0.5
Land Cost	$140,000
Total Investment	**$1,300,000**

Employment distribution among the relevant major occupational groups for the industry are shown as follows:

B2B Call Center – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
General and Operations Managers	2	$54.50	$51.74
Training and Development Specialists	1	$32.04	$30.52
Business Operations Specialists, All Other	1	$34.51	$31.00
Computer User Support Specialists	1	$27.28	$27.26
Counter and Rental Clerks	1	$17.42	$16.44
Sales Representatives of Services	2	$32.15	$29.47
Telemarketers	4	$15.07	$16.95
First-Line Supervisors of Office and Administrative Support Workers	3	$30.64	$30.29
Bill and Account Collectors	4	$19.89	$20.16
Customer Service Representatives	21	$18.66	$18.46
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1	$19.32	$18.53
Mail Clerks and Mail Machine Operators, Except Postal Service	1	$16.63	$16.71
Office Clerks, General	1	$19.35	$19.43
Total	**43**		
Average Hourly Wage		**$22.41**	**$22.08**

Base financial information is as follows:

B2B Call Center – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$147,000**	**$119**	**$1,160,000**	**$1,307,000**	**$1,045,600**	**$82,200**
Fort Lauderdale	$1,437,000	$716,000	$125	$1,202,000	$1,918,000	$1,534,400	$120,600
Orlando	$201,000	$100,000	$123	$1,188,000	$1,288,000	$1,030,400	$81,000
Palm Bay	$494,000	$246,000	$130	$1,243,000	$1,489,000	$1,191,200	$93,600
Pompano Beach	$2,057,000	$1,025,000	$125	$1,202,000	$2,227,000	$1,781,600	$140,000
Port St. Lucie	$146,000	$73,000	$121	$1,176,000	$1,249,000	$999,200	$78,500
West Palm Beach	$975,000	$486,000	$125	$1,202,000	$1,688,000	$1,350,400	$106,100

Profitability for a B2B Call Center in Cape Coral is **7.9%** which leads all competition:

B2B Call Centers – Competitive Evaluation – Annual Operating Profits							
Market	Cape Coral	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	**100.0%**	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Payroll	**54.9%**	57.8%	55.4%	55.7%	57.8%	53.3%	57.8%
Utilities & Fuels	**8.0%**	10.0%	8.7%	10.0%	10.1%	10.0%	10.0%
Debt Service	**1.7%**	2.5%	1.7%	1.9%	2.9%	1.6%	2.2%
Cost of goods sold	**64.6%**	70.3%	65.8%	67.6%	70.8%	64.9%	70.0%
Annual Gross profit	**35.4%**	29.7%	34.2%	32.4%	29.2%	35.1%	30.0%
Less: Sales exp.	**7.5%**	7.5%	7.5%	7.5%	7.5%	7.5%	7.5%
General & Administrative. Overhead	**20.0%**	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
Total Operating expenses	**27.5%**	27.5%	27.5%	27.5%	27.5%	27.5%	27.5%
Annual Net Profit before taxes	**7.9%**	2.2%	6.7%	4.9%	1.7%	7.6%	2.5%

<u>Labor Capability</u>

To verify if labor capability exists in the Cape Coral area to support B2B Call Centers, a review of the work force of the Cape Coral-Fort Myers Metropolitan Statistical Area (MSA) is necessary, as new applicants could commute from anywhere in the MSA. Available labor is calculated by using both the current unemployment rates for the MSA (U3) factored by the U6 under-employment rate[5] from the Bureau of Labor Statistics. For the Cape Coral-Fort Myers MSA, the November 2023 U3 unemployment rate was **3.1%**. By use of a U6 factor derived from the US November 2023 U3 and U6 rates, the true unemployment rate for the MSA can be established at **5.9%**, as shown below:

US	US	Cape Coral-Fort Myers FL MSA
Nov. '23 U3:	3.3%	3.1%
Nov. '23 U6:	6.5%	**5.9%**
Factor:	1.91	

[5] U6: Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

With the target of **359** new jobs, the Employee Census table from above is revisited with the new job requirements shown:

B2B Call Centers – Occupations Needed		
Occ. Code	Occupation	# of new jobs
43-4051	Customer Service Representatives	182
41-9041	Telemarketers	41
43-3011	Bill and Account Collectors	35
43-1011	First-Line Supervisors of Office and Administrative Support Workers	24
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	16
11-1021	General and Operations Managers	14
43-9061	Office Clerks, General	9
41-2021	Counter and Rental Clerks	8
15-1232	Computer User Support Specialists	8
43-9051	Mail Clerks and Mail Machine Operators, Except Postal Service	7
13-1151	Training and Development Specialists	6
13-1199	Business Operations Specialists, All Other	5
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	5
	Total Occupations Required	**359**

In the following, the thirteen categories of staffing for B2B Call Centers are evaluated for direct hiring capabilities:

43-4051 - Customer Service Representatives

In the Cape Coral-Fort Myers MSA, there are currently **7,480** persons employed in this position. Using the U6 factor of 5.9%, it is estimated that there are approximately **440** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

41-9041 - Telemarketers

In the MSA, there are currently **170** persons employed in this position. It is estimated that there are approximately **10** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

43-3011 - Bill and Account Collectors

In the MSA, there are currently **160** persons employed in this position. It is estimated that there are approximately **9** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

43-1011 - First-Line Supervisors of Office and Administrative Support Workers

In the MSA, there are currently **2,790** persons employed in this position. It is estimated that there are approximately **166** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

41-3091 - Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel

In the MSA, there are currently **2,900** persons employed in this position. It is estimated that there are approximately **172** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

11-1021 - General and Operations Managers

In the MSA, there are currently **5,270** persons employed in this position. It is estimated that there are approximately **313** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-9061 - Office Clerks, General

In the MSA, there are currently **6,300** persons employed in this position. It is estimated that there are approximately **374** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

41-2021 - Counter and Rental Clerks

In the MSA, there are currently **1,590** persons employed in this position. It is estimated that there are approximately **94** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

15-1232 - Computer User Support Specialists

In the MSA, there are currently **1,020** persons employed in this position. It is estimated that there are approximately **61** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-9051 - Mail Clerks and Mail Machine Operators, Except Postal Service

In the MSA, there are currently **70** persons employed in this position It is estimated that there are approximately **4** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

13-1151 - Training and Development Specialists

In the MSA, there are currently **530** persons employed in this position. It is estimated that there are approximately **31** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

13-1199 - Business Operations Specialists, All Other

In the MSA, there are currently **1,180** persons employed in this position. It is estimated that there are approximately **70** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-6014 - Secretaries and Administrative Assistants, Except Legal, Medical, and Executive

In the MSA, there are currently **2,990** persons employed in this position. It is estimated that there are approximately **177** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

<u>Conclusion</u>

In summary, the positions that exhibit shortfall for B2B Call Centers are:

- Telemarketers
- Bill and Account Collectors
- Mail Clerks and Mail Machine Operators, Except Postal Service

We will address training and educational strategies to address these jobs in the Task 10 – Workforce Analysis/Developments section.

Healthcare & Life Sciences Cluster: Medical Laboratory

In development of the Healthcare & Life Sciences Cluster, a projection of **3,087** new employees in **11** NAICS four-digit industries classifications weas established:

Healthcare & Life Sciences Cluster

NAICS	Industry	# of New Jobs
5417	Scientific research and development services	127
6211	Offices of physicians	678
6212	Offices of dentists	22
6213	Offices of other health practitioners	14
6214	Outpatient care centers	103
6215	Medical and diagnostic laboratories	92
6216	Home health care services	302
6219	Other ambulatory health care services	106
6221	General medical and surgical hospitals	1,515
6222	Psychiatric and substance abuse hospitals	45
6223	Specialty (except psychiatric and substance abuse) hospitals	83
	Subtotal	**3,378**

For exploratory purposes, we have selected **NAICS 6215 – Medical & Diagnostic Laboratories** for deeper examination. For this industry category, we projected the growth of **92** new jobs. Within this heading are **2** NAICS 5-digit sub-categories, one of which we will explore in greater detail.

Medical laboratories

- Bacteriological laboratories
- Biological laboratories
- Blood analysis laboratories
- DNA testing laboratories
- Forensic laboratories
- Pathology analysis laboratories
- Toxicology health laboratories
- Urinalysis laboratories

Diagnostic laboratories

- CT-SCAN centers
- Dental X-ray laboratories
- Magnetic resonance imaging
- Mammogram centers
- Medical X-ray laboratories
- Mobile breast imaging centers
- Mobile X-ray facilities
- Radiological laboratories

62151 – Medical Laboratories

This U.S. industry comprises establishments known as Blood analysis laboratories primarily engaged in providing analytic or diagnostic services, including body fluid analysis, generally to the medical profession or to the patient on referral from a health practitioner. The national average size for a typical facility is **11** persons, and the State of Florida's is **12** persons. A nominal facility size of **12** persons is selected as a Cape Coral model for this industry. Average productivity output for NAICS 6215 - Medical & Diagnostic Laboratories is **$238,000** per employee. Total investment per employee is estimated at **$323,600**, and with the projected gain of **92** new jobs in the industry in Cape Coral, this category could produce an investment of total of **$29,771,200** for the City.

Typical Medical Laboratory Facility	
Annual Net sales	$2,786,000
Total Employment	12
Avg. hourly Wage	$31.10
Fringe benefits Percentage	35%
Total Payroll	$1,048,000
Facility Footprint sq. ft.	6,790
Employee Occupancy/sf	580
Floor-Area-Ratio	0.39
Facility Construction Cost/sq. ft.	$357
Facility Construction Cost	$2,427,000
Estimated Equipment Cost	$1,214,000
Site Acreage	0.5
Land Cost	$147,500
Total Investment	**$3,788,500**

Employment distribution among the relevant major occupational groups for the industry are shown as follows:

Medical Laboratories – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Medical and Health Services Managers	1	$57.46	$61.38
Medical Scientists, Except Epidemiologists	1	$47.67	$47.67
Clinical Laboratory Technologists and Technicians	3	$26.67	$30.76
Diagnostic Medical Sonographers	1	$35.63	$37.93

Radiologic Technologists and Technicians	1	$29.94	$31.13
Phlebotomists	2	$18.07	$18.37
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	1	$35.15	$29.47
Customer Service Representatives	1	$18.66	$18.46
Medical Secretaries and Administrative Assistants	1	$18.04	$18.15
Total	**12**		
Average Hourly Wage		**$29.89**	**$31.10**

Base financial information is as follows:

Medical Laboratories – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$147,500**	**$357**	**$2,427,000**	**$3,788,500**	**$3,030,800**	**$238,100**
Fort Lauderdale	$1,437,000	$718,500	$374	$2,537,000	$4,469,500	$3,575,600	$280,900
Orlando	$201,000	$100,500	$368	$2,500,000	$3,814,500	$3,051,600	$239,800
Palm Bay	$494,000	$247,000	$390	$2,647,000	$4,108,000	$3,286,400	$258,200
Pompano Beach	$2,057,000	$1,028,500	$374	$2,537,000	$4,779,500	$3,823,600	$300,400
Port St. Lucie	$146,000	$73,000	$364	$2,470,000	$3,757,000	$3,005,600	$236,200
West Palm Beach	$975,000	$487,500	$374	$2,537,000	$4,238,500	$3,390,800	$266,400

Profitability for Medical Laboratories in Cape Coral are **6.6%**, but with notable competition with Orlando and Port St. Lucie:

Medical Laboratories – Competitive Evaluation – Annual Operating Profits							
Market	**Cape Coral**	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	**100.00%**	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Payroll	37.6%	36.1%	34.1%	33.8%	36.1%	32.6%	36.1%
Utilities & Fuels	17.2%	21.6%	18.7%	21.6%	21.7%	21.6%	21.6%
Debt Service	8.5%	10.1%	8.6%	9.3%	10.8%	8.5%	9.6%
Cost of goods sold	**70.9%**	75.2%	68.9%	72.1%	76.1%	70.2%	74.7%
Annual Gross profit	**29.1%**	24.8%	31.1%	27.9%	23.9%	29.8%	25.3%
Less: Sales exp.	**8.5%**	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%
General & Administrative Overhead	**14.0%**	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%

Total Operating expenses	**22.5%**	22.5%	22.5%	22.5%	22.5%	22.5%	22.5%
Annual Net Profit before taxes	**6.6%**	2.3%	8.6%	5.4%	1.4%	7.3%	2.8%

Labor Capability

To verify if labor capability exists in the Cape Coral area to support Medical laboratories, a review of the work force of the Cape Coral-Fort Myers MSA is required, as new applicants could commute from locations in the MSA. With the target of **92** new jobs, the Employee Census table from above is revisited with the new job requirements shown:

Medical Laboratories – Occupations Needed		
Occ. Code	Occupation	# of new jobs
11-9111	Medical and Health Services Managers	8
19-1042	Medical Scientists, Except Epidemiologists	8
29-2010	Clinical Laboratory Technologists and Technicians	23
29-2032	Diagnostic Medical Sonographers	8
29-2034	Radiologic Technologists and Technicians	8
31-9097	Phlebotomists	15
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	8
43-4051	Customer Service Representatives	8
43-6013	Medical Secretaries and Administrative Assistants	8
	Total Occupations Required	**92**

In the following, the nine categories of staffing for Medical Laboratories are evaluated for direct hiring capabilities:

11-9111 - Medical and Health Services Managers

In the Cape Coral-Fort Myers MSA, there are currently **840** persons employed in this position. Using the U6 factor of 5.9%, it is estimated that there are approximately **50** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

19-1042 - Medical Scientists, Except Epidemiologists

In MSA, there are currently **40** persons employed in this position. It is estimated that there are approximately **2** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

29-2010 - Clinical Laboratory Technologists and Technicians

In MSA, there are currently **570** persons employed in this position. It is estimated that there are approximately **34** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

29-2032 - Diagnostic Medical Sonographers

In the MSA, there are currently **200** persons employed in this position. It is estimated that there are approximately **12** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

29-2034 - Radiologic Technologists and Technicians

In the MSA, there are currently **470** persons employed in this position. It is estimated that there are approximately **28** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

31-9097 - Phlebotomists

In the s MSA, there are currently **150** persons employed in this position. It is estimated that there are approximately **9** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

41-3091 - Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel

In the MSA, there are currently **2,900** persons employed in this position. It is estimated that there are approximately **172** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-4051 - Customer Service Representatives

In the MSA, there are currently **7,480** persons employed in this position. It is estimated that there are approximately **444** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-6013 - Medical Secretaries and Administrative Assistants

In the MSA, there are currently **2,050** persons employed in this position. It is estimated that there are approximately **122** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, the positions that exhibit shortfall for B2B Call Centers are:

- Medical Scientists, Except Epidemiologists
- Phlebotomists

We will address training and educational strategies to address these jobs in the Task 10 – Workforce Analysis/Developments section.

Consumer Products & Services Cluster: Sporting and Rec'l. Goods & Supplies Merchant Wholesalers

In development of the Consumer Products & Services Cluster, a projection of **1,430** new employees in **13** NAICS four-digit industries classifications was established:

Consumer Products & Services Cluster

NAICS	Industry	# of New Jobs
4231	Motor vehicle and motor vehicle parts and supplies merchant wholesalers	88
4234	Professional and commercial equipment and supplies merchant wholesalers	269
4236	Household appliances and electrical and electronic goods merchant wholesalers	42
4237	Hardware, and plumbing and heating equipment and supplies merchant wholesalers	44
4239	Miscellaneous durable goods merchant wholesalers	98
4411	Automobile dealers	372

4581	Clothing and clothing accessories retailers	80
4582	Shoe retailers	70
4591	Sporting goods, hobby, and musical instrument retailers	147
4592	Book retailers and news dealers	19
4593	Florists	18
4595	Used merchandise retailers	134
5321	Automotive equipment rental and leasing	49
	Subtotal	**1,430**

For exploratory purposes, we have selected **NAICS 4239 – Miscellaneous Durable Goods Merchant Wholesalers** for deeper examination. For this industry category, we projected the growth of **98** new jobs. Within this heading are **5** sub-categories of industries (NAICS 5-diigit), one of which we will explore in greater detail.

- Sporting and Recreational Goods and Supplies Merchant Wholesalers
- Toy and Hobby Goods and Supplies Merchant Wholesalers
- Recyclable Material Merchant Wholesalers
- Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers
- Other Miscellaneous Durable Goods Merchant Wholesalers

42391 - Sporting and Recreational Goods and Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of sporting goods and accessories; billiard and pool supplies; sporting firearms and ammunition; and/or marine pleasure craft, equipment, and supplies. The national average size for a typical facility is **8** persons, and the State of Florida's is **6** persons. A nominal facility size of **7** persons is selected as a Cape Coral model for this industry. Average productivity output for NAICS 4239 **–** Miscellaneous Durable Goods Merchant Wholesalers is **$946,000** per employee. Total investment per employee is estimated at **$167,200**, and with the projected gain of **98** new jobs in the industry in Cape Coral, this category could produce an investment of total of **$16,386,000** for the City.

Typical Sporting and Recr'l. Goods & Supplies Wholesaler	
Annual Net sales	$6,647,000
Total Employment	7
Avg. hourly Wage	$27.33
Fringe benefits Percentage	35%
Total Payroll	$537,200
Facility Footprint sq. ft.	10,540
Employee Occupancy/sf	1,500

Floor-Area-Ratio	0.25
Facility Construction Cost/sq. ft.	$69
Facility Construction Cost	$730,000
Estimated Equipment Cost	$159,000
Site Acreage	1.0
Land Cost	$286,000
Total Investment	**$1,175,000**

Employment distribution among the relevant major occupational groups for the industry are shown as follows:

Sporting and Recr'l. Goods & Supplies Wholesaler – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Sales Representatives, Wholesale	2	$34.40	$33.41
Laborers and Freight, Stock, and Material Movers, Hand	1	$16.74	$16.72
General and Operations Managers	1	$54.50	$51.54
Stockers and Order Fillers	1	$16.07	$15.46
Heavy and Tractor-Trailer Truck Drivers	1	$23.89	$22.84
Shipping, Receiving, and Inventory Clerks	1	$18.19	$17.93
Total	**7**		
Average Hourly Wage		**$28.31**	**$27.33**

Base financial information is as follows:

Sporting and Recr'l. Goods & Supplies Wholesaler – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$286,000**	**$69**	**$730,000**	**$1,175,000**	**$940,000**	**$73,900**
Fort Lauderdale	$1,437,000	$1,391,000	$73	$769,000	$2,319,000	$1,855,200	$145,800
Orlando	$201,000	$195,000	$71	$752,000	$1,106,000	$884,800	$69,500
Palm Bay	$494,000	$478,000	$76	$796,000	$1,433,000	$1,146,400	$90,100
Pompano Beach	$2,057,000	$1,991,000	$73	$769,000	$2,919,000	$2,335,200	$183,500
Port St. Lucie	$146,000	$141,000	$76	$796,000	$1,096,000	$876,800	$68,900
West Palm Beach	$975,000	$944,000	$76	$796,000	$1,899,000	$1,519,200	$119,400

Profitability for Sporting and Recreational Goods & Supplies Wholesalers in Cape Coral are **11.7**%, leading all competition but with notable competition with Orlando.

Sporting and Recr'l. Goods & Supplies Wholesaler Competitive Evaluation – Annual Operating Profits							
Market	**Cape Coral**	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
Payroll	**37.6%**	36.1%	34.1%	33.8%	36.1%	32.6%	36.1%
Utilities & Fuels	**21.0%**	26.3%	22.9%	26.3%	26.5%	26.3%	26.3%
Debt Service	**2.7%**	5.2%	2.5%	3.2%	6.6%	2.5%	4.3%
Cost of goods sold	**61.3%**	67.6%	59.5%	63.3%	69.2%	61.4%	66.7%
Annual Gross profit	**38.7%**	32.4%	40.5%	36.7%	30.8%	38.6%	33.3%
Less: Sales exp.	**11.0%**	11.0%	11.0%	11.0%	11.0%	11.0%	11.0%
General & Administrative. Overhead	**16.0%**	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%
Total Operating expenses	**27.0%**	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%
Annual Net Profit before taxes	**11.7%**	5.4%	13.5%	9.7%	3.8%	11.6%	6.3%

Labor Capability

To verify if labor capability exists in the Cape Coral area to support Sporting and Recreational Goods and Supplies Merchant Wholesalers, a review of the work force of the Cape Coral-Fort Myers MSA is required, as new applicants could commute from locations in the MSA. With the target of **98** new jobs, the Employee Census table from above is revisited with the new job requirements shown:

Sporting & Recreational Goods & Supplies Wholesaler – Occupations Needed		
Occ. Code	Occupation	# of new jobs
41-4012	Sales Representatives, Wholesale	28
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	14
11-1021	General and Operations Managers	14
53-7065	Stockers and Order Fillers	14
53-3032	Heavy and Tractor-Trailer Truck Drivers	14
43-5071	Shipping, Receiving, and Inventory Clerks	14
	Total Occupations Required	**98**

In the following, the six categories of staffing for Sporting & Recreational Goods & Supplies Wholesaler**s** are evaluated for direct hiring capabilities:

41-4012 - Sales Representatives, Wholesale

In the Cape Coral-Fort Myers MSA, there are currently **2,320** persons employed in this position. Using the U6 factor of 5.9%, it is estimated that there are approximately **138** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

53-7062 - Laborers and Freight, Stock, and Material Movers, Hand

In the MSA, there are currently **3,220** persons employed in this position. It is estimated that there are approximately **191** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

11-1021 - General and Operations Managers

In the MSA, there are currently **5,270** persons employed in this position. It is estimated that there are approximately **313** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

53-7065 - Stockers and Order Fillers

In the MSA, there are currently **5,710** persons employed in this position. It is estimated that there are approximately **339** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

53-3032 - Heavy and Tractor-Trailer Truck Drivers

In the MSA, there are currently **2,450** persons employed in this position. It is estimated that there are approximately **145** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-5071 - Shipping, Receiving, and Inventory Clerks

In the MSA, there are currently **1,110** persons employed in this position. It is estimated that there are approximately **66** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, we do not foresee any positions that exhibit shortfall for Sporting and Recreational Goods and Supplies Merchant Wholesalers. For a potential Cape Coral location, we expect that wholesalers will not experience any significant labor shortages.

Community Services Cluster: State Agencies

Since neither the US Census nor the Bureau of Labor Statistics publish employment data on public administration, building an operational model in this category is difficult. In Lee County, the State of Florida operates **50** leased office locations for **19** State Agencies. In total, this covers **312,851 sf** of office space. Only **4** of the 19 agencies have a presence in Cape Coral, accommodating only **7,049 sf** or **2%** of the State's footprint in the county[6], as shown in the table below:

Agency	Lee County Area sf	Cape Coral Area sf
Department of Management Services	176,113	
Department of Law Enforcement	43,024	
Department of Revenue	14,365	
Department of Financial Services	13,631	
Department of Health	11,938	
Department of Highway Safety and Motor Vehicles	10,000	
Department of Education	7,458	100
Department of Juvenile Justice	7,275	6,427
Division of Administrative Hearings	7,097	
Department of the Lottery	6,400	
Department of Agriculture and Consumer Services	5,382	300
Department of Legal Affairs	5,181	
Fish And Wildlife Conservation Commission	1,997	
Auditor General	1,124	
Department of Economic Opportunity	1,008	
Department of Business and Professional Regulation	336	
Department of Veterans' Affairs	222	222
Executive Office of the Governor	200	
Department of Children and Families	100	
Total Office Floor area sf	**312,851**	**7,049**

[6] State of Florida Land and Facilities Search; Dept. of Environmental Protection; https://prodenv.dep.state.fl.us/DslPi/searchStateFacilityLeaseNew.action

Number of agencies	**19**	**4**
Cape Coral's Share of State Agencies Footprint in Lee County		**2%**

With the goal of growing state government employment in Cape Coral by **879** jobs, new office space is required of the size to accommodate the staff. At the rate of **180 sf** per employee, an industry standard for government office occupancy[7], that would result in the opportunity to construct **158,200 sf** of new office space.

Vocational Rehabilitation Services

Although a government operation, the metric for this industry comes from the private sector. The private non-profit Vocational Rehabilitation Services industry comprises (1) establishments primarily engaged in providing vocational rehabilitation or habilitation services, such as job counseling, job training, and work experience, to unemployed and underemployed persons, persons with disabilities, and persons who have a job market disadvantage because of lack of education, job skill, or experience and (2) establishments primarily engaged in providing training and employment to persons with disabilities. The national average size for a typical facility is 18 persons, and the State of Florida's is 21 persons. A nominal facility size of **20** persons is selected as a Cape Coral model for this industry. Average non-profit output is estimated at **$115,400** per employee. Total investment per employee is estimated at **$30,700**, and with the projected gain of **879** new jobs in the industry in Cape Coral, this category could produce an investment of total of **$26,985,300** for the City.

Typical Vocational Rehabilitation Services Agency	
State Budget Stipend	$2,250,000
Total Employment	20
Avg. hourly Wage	$24.62
Fringe benefits Percentage	35%
Total Payroll	$1,382,500
Facility Footprint sq. ft.	3,500
Employee Occupancy/sf	180
Floor-Area-Ratio	0.33
Facility Construction Cost/sq. ft.	$119

[7] Department of Energy – Office Space Standard, 2016; chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://fims.doe.gov/fimsinfo/Documents/DOE/2016_Office_Space_Standard.pdf

Facility Construction Cost	$418,000
Estimated Equipment Cost	$110,000
Site Acreage	0.2
Land Cost	$71,000
Total Investment	**$599,000**

Employment distribution among the relevant major occupational groups for the industry are shown as follows:

Vocational Rehabilitation Services Agency – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Rehabilitation Counselors	6	$21.26	$20.66
Social and Human Service Assistants	3	$19.18	$18.51
Educational, Guidance, and Career Counselors and Advisors	3	$26.10	$29.08
Social and Community Service Managers	2	$35.70	$37.19
General and Operations Managers	1	$54.50	$51.54
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2	$19.32	$18.53
Office Clerks, General	1	$19.35	$19.43
Community and Social Service Specialists, All Other	1	$27.33	$21.85
Total	**20**		
Average Hourly Wage		**$24.82**	**$24.62**

Base financial information is as follows:

Vocational Rehabilitation Services Agency – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	**$295,000**	**$71,000**	**$119**	**$528,000**	**$599,000**	**$479,200**	**$37,700**
Fort Lauderdale	$1,437,000	$347,000	$125	$547,000	$894,000	$715,200	$56,200
Orlando	$201,000	$48,000	$123	$540,000	$588,000	$470,400	$37,000
Palm Bay	$494,000	$119,000	$130	$565,000	$684,000	$547,200	$43,000
Pompano Beach	$2,057,000	$496,000	$125	$547,000	$1,043,000	$834,400	$65,600
Port St. Lucie	$146,000	$35,000	$121	$535,000	$570,000	$456,000	$35,800
West Palm Beach	$975,000	$235,000	$125	$547,000	$782,000	$625,600	$49,200

Net Operating Surplus (or Shortfall) for a Vocational Rehabilitation Services Agency in Cape Coral is **3.9**%, leading other competition except for Port St. Lucie.

Vocational Rehabilitation Services Agency – Annual Operating Ratios							
Market	**Cape Coral**	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Operating Budget	**100.0%**	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Payroll	**61.4%**	66.7%	61.2%	60.4%	66.7%	58.9%	66.7%
Utilities & Fuels	**8.0%**	10.0%	8.7%	10.0%	10.1%	10.0%	10.0%
Debt Service	**1.7%**	2.5%	1.6%	1.9%	2.9%	1.6%	2.2%
Cost of revenue	**71.1%**	79.3%	71.5%	72.4%	79.8%	70.5%	78.9%
Annual Gross Surplus	**28.9%**	20.7%	28.5%	27.6%	20.2%	29.5%	21.1%
Materials	**5.0%**	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%
General & Administrative. Overhead	**20.0%**	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
Net Operating expenses	**25.0%**	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%
Annual Net Surplus (or Shortfall)	**3.9%**	-4.3%	3.5%	2.6%	-4.8%	4.5%	-3.9%

**Note: Sales expense has been removed from the analysis*

Labor Capability

To verify if labor capability exists in the Cape Coral area to support a large-scale Vocational Rehabilitation Services Agency, a review of the work force of the Cape Coral-Fort Myers MSA is required, as new applicants could commute from locations in the MSA. With the target of **879** new jobs, the Employee Census table from above is revisited with the new job requirements shown:

Vocational Rehabilitation Services Agency – Occupations Needed		
Occ. Code	Occupation	# of new jobs
21-1015	Rehabilitation Counselors	264
21-1093	Social and Human Service Assistants	132
21-1012	Educational, Guidance, and Career Counselors and Advisors	132
11-9151	Social and Community Service Managers	88
11-1021	General and Operations Managers	44
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	88

43-9061	Office Clerks, General	44
21-1099	Community and Social Service Specialists, All Other	44
43-3031	Bookkeeping, Accounting, and Auditing Clerks	44
	Total Occupations Required	**879**

In the following, the nine categories of staffing for a Vocational Rehabilitation Services Agency are evaluated for direct hiring capabilities:

21-1015 - Rehabilitation Counselors

In the Cape Coral-Fort Myers MSA, there are currently **50** persons employed in this position. Using the U6 factor of 5.9%, it is estimated that there are approximately **3** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

21-1093 - Social and Human Service Assistants

In the MSA, there are currently **490** persons employed in this position. It is estimated that there are approximately **29** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

21-1012 - Educational, Guidance, and Career Counselors and Advisors

In the MSA, there are currently **430** persons employed in this position. It is estimated that there are approximately **26** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

11-9151 - Social and Community Service Managers

In the MSA, there are currently **220** persons employed in this position. It is estimated that there are approximately **13** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

11-1021 - General and Operations Managers

In the MSA, there are currently **5,270** persons employed in this position. It is estimated that there are approximately **313** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-6014 - Secretaries and Administrative Assistants, Except Legal, Medical, and Executive

In the MSA, there are currently **2,990** persons employed in this position. It is estimated that there are approximately **177** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-9061 - Office Clerks, General

In the MSA, there are currently **6,330** persons employed in this position. It is estimated that there are approximately **374** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

21-1099 - Community and Social Service Specialists, All Other

In the MSA, there are currently **180** persons employed in this position. It is estimated that there are approximately **11** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

43-3031 - Bookkeeping, Accounting, and Auditing Clerks

In the MSA, there are currently **3,510** persons employed in this position. It is estimated that there are approximately **208** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, the positions that exhibit shortfall for a large Vocational Rehabilitation Services Agency are:

- Rehabilitation Counselors
- Social and Human Service Assistants
- Educational, Guidance, and Career Counselors and Advisors

- Social and Community Service Managers
- Community and Social Service Specialists, All Other

A smaller operation is a workable solution, but there may need to be some training and educational strategies needed to address these specialized jobs for a larger operation. We will delve deeper into public sector workforce requirements in the Task 10 – Workforce Analysis/Developments section.

Retail Review

To gauge the retail industry's performance, the generation of a Gap/Leakage Analysis has been the traditional course of action. The surge of online shopping use, however, has made this methodology somewhat obsolete as internet retail has changed the marketplace. Alternatively, we will use **43** retail spending items derived from ESRI's Retail Outlook[8] distributed in the **8** groups as follows:

- Apparel & Services
- Computers
- Entertainment & Recreation
- Food
- Health
- Household Furnishings & Equipment
- Household Operations
- Travel

The initial use of this analysis was conducted in the Econographics Market Profiles developed in Task 2. Here, we will reexamine the retail spending patterns of Cape Coral as compared to the State of Florida, again using the Location Quotient (LQ) methodology. Key sectors are above the median for each category and also above 1.0 parity level.

Apparel & Services

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Men's Apparel	$29,245,285	19.0%	50.5%	0.377	
Women's Apparel	**$52,937,106**	**34.5%**	**9.6%**	**3.580**	■

[8] ESRI Retail Demand Outlook; Business Analyst; Florida and Cape Coral, 2023

Children's Apparel	$23,467,135	15.3%	17.3%	0.882	
Footwear	**$34,002,380**	**22.1%**	**7.6%**	**2.927**	■
Watches & Jewelry	$10,941,714	7.1%	11.3%	0.629	
Apparel Products and Services	$3,054,429	2.0%	3.7%	0.543	
Apparel and Services	**$153,648,049**	**100.0%**	**100.0%**	**0.755**	**median**

Computers

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Computers and Hardware for Home Use	$18,126,753	85.1%	85.2%	0.999	
Portable Memory	**$336,520**	**1.6%**	**1.5%**	**1.047**	■
Computer Software	$998,774	4.7%	4.8%	0.981	
Computer Accessories	**$1,833,697**	**8.6%**	**8.5%**	**1.017**	■
Computer	**$21,295,744**	**100.0%**	**100.0%**	**1.008**	**median**

Entertainment & Recreation

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Fees and Admissions	**$51,101,608**	**18.4%**	**18.4%**	**1.003**	■
TV/Video/Audio	$99,508,627	35.9%	36.6%	0.979	
Pets	**$67,945,182**	**24.5%**	**24.1%**	**1.015**	■
Toys/Games/Crafts/Hobbies	$11,675,835	4.2%	4.2%	0.999	
Recreational Vehicles and Fees	**$11,091,934**	**4.0%**	**3.7%**	**1.070**	■
Sports/Recreation/Exercise Equipment	**$21,618,979**	**7.8%**	**7.6%**	**1.027**	■
Photo Equipment and Supplies	$3,347,965	1.2%	1.2%	0.995	
Reading	$9,190,597	3.3%	3.4%	0.978	
Catered Affairs	$2,024,547	0.7%	0.8%	0.964	
Entertainment & Recreation	**$277,505,274**	**100.0%**	**100.0%**	**0.999**	**median**

Food

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Food at Home	**$487,590,680**	**60.8%**	**60.8%**	**1.000**	■
Food Away from Home	**$266,554,750**	**33.2%**	**33.2%**	**1.000**	■
Alcoholic Beverages	**$47,890,025**	**6.0%**	**5.9%**	**1.004**	■
Food	**$802,035,455**	**100.0%**	**100.0%**	**1.000**	**median**

Health

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Nonprescription Drugs	**$13,067,386**	26.5%	26.5%	0.999	
Prescription Drugs	**$28,174,829**	**57.1%**	**57.1%**	**1.000**	■
Eyeglasses and Contact	**$8,096,316**	**16.4%**	**16.4%**	**1.001**	■
Health	**$49,338,531**	**100.0%**	**100.0%**	**1.000**	**median**

Household Furnishings and Equipment

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Household Textiles	$8,771,030	6.5%	6.7%	0.976	
Furniture	$60,544,956	45.1%	45.4%	0.992	
Rugs	**$2,959,638**	**2.2%**	**2.2%**	**1.000**	■
Major Appliances	**$40,464,887**	**30.1%**	**29.1%**	**1.033**	■
Housewares	$7,920,010	5.9%	5.9%	0.995	
Small Appliances	$5,176,570	3.9%	4.0%	0.967	
Luggage	$1,034,187	0.8%	0.8%	0.977	
Telephones and Accessories	$7,521,109	5.6%	5.8%	0.958	
Household Furnishings and Equipment	**$134,392,387**	**100.0%**	**100.0%**	**0.984**	**median**

Household Operations

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Lawn and Garden	**$50,851,590**	**25.5%**	**24.2%**	**1.051**	■

Housekeeping Supplies	$68,759,882	34.5%	34.5%	0.998	
Personal Care Products	$39,586,452	19.8%	20.2%	0.981	
School Books and Supplies	$9,707,134	4.9%	4.9%	0.990	
Smoking Products	$30,672,004	15.4%	16.1%	0.953	
Household Operations	**$199,577,062**	**100.0%**	**100.0%**	**0.990**	**median**

Travel

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Gasoline and Motor Oil	$186,699,088	58.5%	58.9%	0.994	
Airline Fares	$33,596,097	10.5%	10.5%	1.002	
Lodging on Trips	**$52,515,078**	**16.4%**	**16.2%**	**1.016**	■
Auto/Truck Rental on Trips	**$5,784,219**	**1.8%**	**1.8%**	**1.005**	■
Food and Drink on Trips	**$40,661,189**	**12.7%**	**12.6%**	**1.007**	■
Travel	**$319,255,671**	**100.0%**	**100.0%**	**1.005**	**median**

Conclusion

For Cape Coral's **$1.957** billion total spending on retail in the 43 categories, the following **19** groups represent the key retail sectors where consumer spending is the highest (ranked by retail spending). Together they total **$1.272** billion or **65%** of the Cape Coral consumer spending pattern:

Retail category	Retail spending	LQ
Food at Home	$487,590,680	1.000
Food Away from Home	$266,554,750	1.000
Pets	$67,945,182	1.015
Women's Apparel	$52,937,106	3.580
Lodging on Trips	$52,515,078	1.016
Fees and Admissions	$51,101,608	1.003
Lawn and Garden	$50,851,590	1.051
Alcoholic Beverages	$47,890,025	1.004
Food and Drink on Trips	$40,661,189	1.007
Major Appliances	$40,464,887	1.033
Footwear	$34,002,380	2.927
Prescription Drugs	$28,174,829	1.000

Sports/Recreation/Exercise Equipment	$21,618,979	1.027
Recreational Vehicles and Fees	$11,091,934	1.070
Eyeglasses and Contact	$8,096,316	1.001
Auto/Truck Rental on Trips	$5,784,219	1.005
Rugs	$2,959,638	1.000
Computer Accessories	$1,833,697	1.017
Portable Memory	$336,520	1.047
Total	**$1,272,410,607**	
Percent of Total Consumers Spending		**65%**

From the above list, it is apparent that Women's' Apparel (LQ=3.580) and Footwear (LQ=2.927) are dominant categories by virtue of their high LQ scores. Cross-marching these two segments against the Consumer Products & Services cluster reinforces the role of NAICS 4581 - Clothing and clothing accessories retailers and 4582 - Shoe retailers in the cluster assignment.

Please note that **6** other categories exhibited above median performance but where still below the 1.0 parity level for the State of Florda in the LQ methodology. These are areas of minor concern for Cape Coral but should be addressed:

- Housekeeping Supplies
- Furniture
- Children's Apparel
- Toys/Games/Crafts/Hobbies
- School Books and Supplies
- Housewares

In total for Cape Coral, **20** of the 43 retail sectors had LQ's above the 1.0 parity LQ levels. This indicates that consumers have active demand for retail products and services. Most industries were at about a level of 0.9 LQ or higher, with the notable exceptions of the following weaknesses:

- Watches & Jewelry
- Apparel Products and Services
- Men's Apparel

Assistance Programs Review

In this section, we will introduce state and local assistance programs that may have a bearing on cluster development and prioritization. A more detailed review will occur in Task 5 – Incentives. To reiterate, the clusters developed in this report are:

- BUSINESS & FINANCIAL SERVICES
- COMMUNITY SERVICES
- CONSUMER PRODUCTS & SERVICES
- CULINARY TOURISM
- HEALTHCARE & LIFE SCIENCES
- INDUSTRIAL SERVICES
- IT & MEDIA
- SUSTAINABLE REAL ESTATE

State of Florida

The state of Florida offers a number of assistance incentives for business. These include:

- Capital Investment Tax Credit (CITC)
- Research and Development Tax Credit
- Quick Response Training (QRT)
- Incumbent Worker Training (IWT)
- Brownfield Redevelopment Bonus
- High Impact Performance Incentive Grant (HIPI)
- Community Contribution Tax Credit Program (CCTCP)
- Research and Development Tax Credit Program
- Rural and Urban Job Tax Credit Programs

Sales tax exemptions cover:

- R&D Equipment (Predominant Use)
- Semiconductor, Defense, and Space Technology Production Equipment
- Manufacturing Machinery and Equipment and Subsequent Labor, Parts, and Materials Used to Repair Equipment
- Electricity Used in the Manufacturing Process
- Clean Energy
- Aircraft Expenditures
- Spacecraft Expenditures

Directly sourced from the FloridaCommerce[9] website:

"Florida industry specific resources are available for film, sports, logistics and tourism and for Florida's leading industry clusters. The leading industry clusters include clean technology, life sciences, information technology, aviation and aerospace, logistics and distribution, homeland security and defense, and financial and professional services. The state is also focusing economic development efforts with the strategic areas of emphasis being manufacturing, locating corporate headquarters and emerging technologies."

Florida Recent Actions

It should be noted that the State of Florida has taken recent action to repeal several tax credit programs, some of which could have been directly applicable to Cape Coral's target industries. As of May 2023, the following have been terminated or no longer funded:

- Qualified target industry (QTI) tax refund program
- Quick action closing fund program
- New markets tax credit program
- Entertainment industry tax credit program
- Qualified defense contractor and space flight tax refund
- Corporate income tax credit for spaceflight projects program
- Innovation Incentive Program

Enterprise Florida Contact

Two telephone conversations were held with representatives of Enterprise Florida, the state's economic development agency. We contacted the Business Development office in Orlando and the Trade office in Miami (Coral Gables). As to the question asked if there were any new incentive programs being considered, we were advised that there were no new programs under development at the present time. No information was obtained as to whether the QTI would be reinstated.

[9] FloridaCommerce; Business Resources – Industry Specific Resources; https://floridajobs.org/business-growth-and-partnerships/for-businesses-and-entrepreneurs/business-resource

Southwest Florida Planning Council (SWFPC)

The SWFPC is helpful in promoting the region through projects it initiates on key subjects. Among these are:

- Resiliency & Climate Change Projects
- Ecosystem Services Projects
- Sustainable and Equitable Agricultural Projects
- Covid Recovery & Resiliency

The Council does not provide direct financial assistance, but important studies such as the Cape Coral Climate Change or the Evacuation Study can have direct impacts on targeted industry clusters sustainability.

Lee County

- Industrial Development Revenue Bonds (IDRBs): long-term, tax-exempt, low-rate financing of capital requirements for new and expanding manufacturing facilities in Lee County.

- Gold Key Grant Program: financial assistance to small businesses leveraging in the US Commercial Services Gold Key Matching service.

- Opportunity Zones: temporary, step-up, or permanent deferral of inclusion in taxable income for capital gains reinvested into an Opportunity Fund.

City of Cape Coral

The City of Cape Coral has some interesting programs that we will explore in greater detail in Task 5. Recommendations to modify these to better address the target industry clusters will be made:

- Breaking Barriers to Business (B2B) Program
- Ad Valorem Tax Incentive Program
- Business Infrastructure Grant
- Cape Collaborates - Small Business Partner Program
- Enhanced Property Value Recapture Grant

Incubators & Accelerators

The development of business incubators nationwide has proven to be benefit to startup companies, with about 87% survivability after five years as compared to 44% without such assistance[10]. Typically, a business incubator helps to develop and refine high-potential startup ideas. Incubators often operate locally and provide a host of resources—such as physical space to access as needed—over a span of one to five years.

A recent addition to incubators are Accelerators -- short, intensive programs that provide education, resources, and mentorship for early- or mid-stage companies. Accelerators are normally more structured and feature specific tracks to turn startup into a scalable business. Some offer multiple programs targeted at different industries or venture stages.

Examples of successful Incubator and Accelerators in Florida include:

- Culinary Accelerator @ Immokalee[11] -- members may select from a range of customized hours and plans to prepare, cook and package their culinary creations for distribution.

- TEC Garage (Tampa Bay Innovation Center)[12] -- home to independent workers including solo entrepreneurs, lawyers, investors, accountants, graphic designers, engineers, and other related occupations geared towards tech startups. The space is great for small companies, remote workers, startups and anyone who wants to share ideas, knowledge, space and equipment.

- Goldstein Business Accelerator[13] (Orlando) -- provides access to $100,000 in seed funding, mentorship from a seasoned pool of knowledgeable experts and introductions to angel investors and venture capitalist firms.

- Miami Lab Ventures: a Venture-capital fund and startup studio dedicated to accelerating real estate and construction technology industries.

Conclusions

It is possible that companies in the targeted industry clusters may need some degree of financial incentives to consider a Cape Coral location. These could be across industry programs or more tailored to individual companies. We examine the role of incentives more thoroughly in Task 5. Clearly, the development of incubators and accelerators will have a key role in successful cluster

[10] "Incubators Heat Up Chances of Small Business Survival", Business New Daily; October 23., 2023; https://www.businessnewsdaily.com/272-incubators-increase-small-business-success.html
[11] https://www.collieredo.org/culinary-accelerator
[12] TEC Garage ; https://tbinnovates.com/
[13] Goldstein Business Accelerator; https://goldsteinaccelerator.com/

promotion. In the meantime, we are excited by the advantages that Florida offers to prospective employers. As displayed on multiple economic development websites, these advantages reinforce the following:

- No Corporate Income Tax on limited partnerships
- No State Personal Income Tax
- No Corporate Franchise tax on Capital Stock
- No State-Level Property Tax assessed
- No Property Tax on Business Inventories
- No Sales Tax on Manufacturing Machinery & Equipment
- No Property Tax on Goods-in-Transit for up to 180 days
- No Sales Tax on Purchases of Raw Materials Incorporated in a Final Product for Resale, including Non-Reusable Containers or Packaging
- No Sales/Use Tax on Co-Generation of Electricity
- No Sales and Use Tax on Goods Manufactured or Produced in Florida for Export Outside the State

The target industry clusters presented will next be evaluated for economic development administration, incentives, real estate and infrastructure requirements, and workforce education. To recap, the new Cape Coral target industries are:

- BUSINESS & FINANCIAL SERVICES
- COMMUNITY SERVICES
- CONSUMER PRODUCTS & SERVICES
- CULINARY TOURISM
- HEALTHCARE & LIFE SCIENCES
- INDUSTRIAL SERVICES
- IT & MEDIA
- SUSTAINABLE REAL ESTATE

The 13,640 forecasted total employment for the 8 targeted industry clusters will produce a total of 15,162 new jobs (direct, indirect, and induced) and an annual total economic impact of $3.358 billion, as shown in the table below:

Cluster	Direct Empl.	Indirect Empl.	Induced Empl.	Total Empl.	Labor Income	GDP Value Added	Total output
Business & Financial Services	3,675	253	50	3,978	$ 254,634,582	$ 298,732,626	$ 614,095,719
Community Services	3,927	446	59	4,431	$ 443,126,637	$ 757,735,450	$ 1,344,640,009
Consumer Products & Services	1,430	131	24	1,585	$ 130,667,818	$ 225,113,563	$ 379,315,014
Culinary Tourism	123	2	1	126	$ 4,257,599	$ 7,040,277	$ 11,070,960
Healthcare & Life Sciences	3,087	264	96	3,448	$ 281,772,074	$ 328,634,799	$ 568,359,440
Industrial Services	256	36	14	306	$ 31,137,817	$ 50,646,917	$ 92,081,287
IT & Media	770	93	10	874	$ 56,682,708	$ 87,414,340	$ 255,354,976
Sustainable Real Estate	372	36		414	$ 28,321,677	$ 51,842,661	$ 92,640,448
Total	**13,640**	**1,262**	**254**	**15,162**	**$ 1,230,600,911**	**$ 1,807,160,634**	**$ 3,357,557,854**

3.e – Task 3 Progress Report/video conference

We conducted a video conference with the Project Review Committee on January 24, 2024. Work product to date was discussed and the materials covered were previously uploaded to the website.

Economic Development Strategic Plan - RCM2342AS

Task 4 Report

prepared for:

City of Cape Coral – Office of Economic and Business Development

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February 24, 2024

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Task 4: Assessment of the City Economic Development Structure

4.a – Economic Development in Cape Coral

The Cape Coral Office of Economic & Development (OEBD) is the Economic Development Organization (EDO) for the City. An objective of this task is the recognition of the importance of economic development and if current measures are effective.

Why Economic Development is Important

As Cape Coral grows, it is crucial that economic growth also grows, and the goal should be a reasonable balance of the two metrics. Without economic performance gains, municipal services and budgets will be forced to accommodate significant stress in meeting the needs of a larger and aging population. New revenue from business expansion and investment will provide the financial resources that the City of Cape Coral will need in the future.

<u>As of the present time, this is not being accomplished</u>. In the table below (refer to Appendix Table 4.1), Cape Coral and its competing cities' three-year rates of growth for the Per Capita Gross Domestic Product (GDP) are compared to Population Growth to produce an Economic Balance Ratio. Data for GDP is based on county-level only, since GDP information is not available on a city level from the Bureau of Economic Analysis (BEA)[1].

	Per Capita GDP Growth 2019-2022	Pop. Growth 2019-2022	Economic Balance Ratio
Pompano Beach	4.03%	0.06%	72.85
Fort Lauderdale	4.03%	0.13%	30.48
West Palm Beach	4.25%	2.60%	1.63
Orlando	2.84%	3.22%	0.88
Palm Bay	2.90%	3.80%	0.76
Cape Coral	**2.01%**	**3.71%**	**0.54**
Port St. Lucie	1.81%	4.72%	0.38
State of Florida	**2.91%**	**1.18%**	**2.48**

As indicated, Cape Coral demonstrates an alarming economic imbalance and trails five of the six competing cities. The State of Florida's **2.48** ratio should be considered as the parity level, and

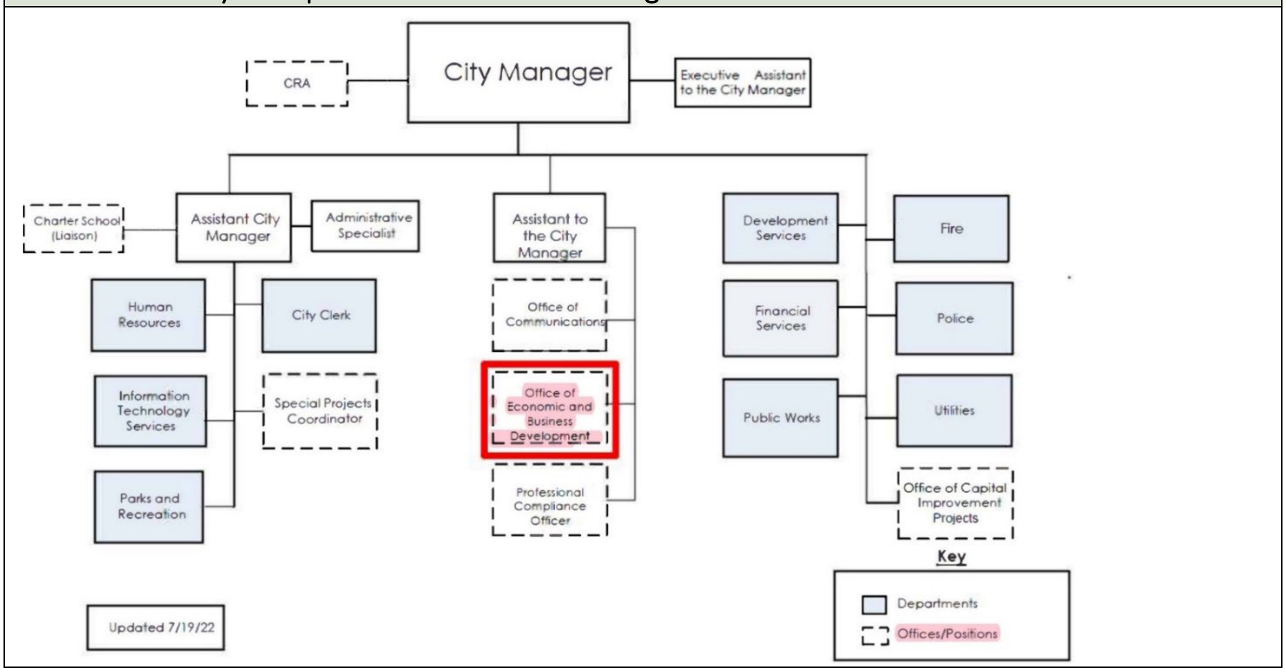
[1] Bureau of Economic Analysis; Gross Domestic Product by County and Metropolitan Area (2022); https://www.bea.gov/sites/default/files/2023-12/lagdp1223.pdf

Cape Coral's **0.54** figure must serve as a wake-up call that more effort is needed to promote economic development in the City.

Organizational Structure and Funding

Initial observation of the OEBD is that its role is one of an office or a position rather than as a City department. As shown in Exhibit 4.1 below, the OEBD serves below the Assistant to the City Manager along with the Office of Communications and Professional Compliance Officer[2].

Exhibit 4.1 – City of Cape Coral Government – Organizational Chart



<u>OEBD Staffing and Budget</u>

As of the FY 2024 report, the OEBD staffing of full-time employees (FTE)s as follows:

Position	FTE
Economic and Business Development Manager	1
Business Development/Recruitment Specialists	3
Total Staff	**4**

Note: The OEBD does not have a full-time grant writing specialist.

[2] City of Cape Coral – FY 2024-2026 Adopted Budget; https://www.capecoral.gov/department/financial_services/office_of_management_and_budget.php

Annual budget for Economic Development in Cape Coral is **$1.306 million** for FY 2024. Forecasting for 2025 shows a decline to **$924,390**, but then a steady **2.6%** growth through 2028. The OEBD's operating budget is derived from the collection of business tax receipts, without any funding contribution from the City's General Fund. Capital Improvement Program (CIP). Our conversations with the Special Project's office and the Financial Services Department indicate that a well-coordinated relationship with OEBD exists thereby facilitating cooperation between departments.

Comparison to Other EDOs

City of Fort Lauderdale

The City of Fort Lauderdale's Economic Development office has **1** FTE and is a non-regulatory advisory board within of the Public Affairs division of the City Manager's office[3]. The FY 2024 adopted budget for the Public Affairs **$2.121 million**, up 27% over FY 2023 figures.

Orlando

The City of Orlando has **9** FTE's dedicated to economic development and **8** FTE's for business development. The total staff is **283** persons and the department has an operating budget of **$49.077 million**[4]. The City of Orlando Economic Development Department supervises the following:

- Business Development
- Orlando Main Streets
- Permitting
- Code Enforcement
- CRA/Downtown
- City Planning

The City of Orlando has budgeted **$13.650 million** for Economic Development projects in its 2023/2024 CIP budget. However, that spending level is projected to decline by 2026.

City of Palm Bay

[3] City of Fort Lauderdale FY 2024 Adopted Annual Budget; https://www.fortlauderdale.gov/home/showpublisheddocument/79304/638380597408100000
[4] City of Orlando Annual Budget 2023/2024; https://www.orlando.gov/Our-Government/Records-and-Documents/Financial/Budget-Documents

The City of Palm Bay's Community & Economic Department has **21** FTEs and an annual operating budget of **$7.490 million**[5]. The Dept. oversees Housing CDBG grants and the Bayfront CRA. FY 2024 objectives include increasing commercial and industrial growth through a series of strategies that leverage assets such as the high-technology sector, economic incentives, crime prevention measures, and underutilized sites.

City of Pompano Beach

The City of Pompano Beach's Economic Development Office has **1** FTE is organized under the Assistant City Manager's Office[6]. The office has an operating budget of **$225,400.** The office provides support to the Pompano Beach Economic Dev. Council, an advisory board with some members being appointed from the City Commission. The City has an innovative plan for its Downtown CRA that is geared toward commercial investment.

City of Port St. Lucie

The City of Port St. Lucie Office of Economic Development has **1** FTEs and an annual operating budget of **$560,000**[7], up about 24% from the previous year. The Office is organized under the Assistant City Manage and is funded through the General Fund. Economic Development is a member of the City's Land Development Team which prequalifies companies for expedited site plan review and fast track permitting. The City also offers the opportunity to mitigate any real or perceived disadvantage due to impact fees to certain qualified target industry businesses.

City of West Palm Beach

The City of West Palm Beach Office of Economic Development has **1** FTE and an annual operating budget of **$379,000**[8]. The office is organized directly under the Mayor's Office. Innovative incentive programs include the Building Improvement Grant Program, the Merchants/Industry Association Creation Program, and the Ad Valorem Tax Exemption for Job Creation Ordinance.

City of Tampa

[5] City of Palm Bay – FY 2024 Approved Annual Budget; https://www.palmbayflorida.org/home/showpublisheddocument/26660/638333048000400000
[6] City of Pompano Beach Adopted Operating Budget FY 2024; /https://cdn.pompanobeachfl.gov/city/pages/budget/Adopted-Operating-Budget-FY24.pdf
[7] City of Port. St. Lucie FY 2023-2024 Adopted Budget; https://www.cityofpsl.com/home/showpublisheddocument/10817/638358142184970000
[8] City of West Palm Beach FY 2024 Approved Budget; https://www.wpb.org/home/showpublisheddocument/6774/638366886298970000

For purpose of comparison, the City of Tampa has been selected as the largest city in the region. The City of Tampa Development & Economic Opportunity Department (D&EOD) has a staff of **224** persons and an annual operating budget of **$53.35 million**[9]. The D&EOD supervises the following:

- City Planning
- Communications
- Construction Services
- CRA
- Development Coordination
- Development & Growth Management
- Economic Opportunity
- Historic Preservation
- Opportunity Zones
- Real Estate
- Tampa Convention Center

Economic Development Tools

OEBD Website Review

Upon visiting the Office of Economic & Business Development webpage on the capecoral.gov site, two clickable choices are available to the user: Economic Incentives; and Site Selection.

The Economic Development button redirects to a general list of incentive offerings which may or may not be relevant to the user. The Site Selection button redirects to Loopnet.com, a commercial property listing service. At the time of this writing, the Loopnet redirect is not functioning.

Sidebar selections provide navigation to eight redirects:

- Why Cape Coral
- Business Assistance
- Interactive Project Map
- News / Events
- Target Industries
- View Reports

[9] City of Tampa FY 2024 Budget; https://stories.opengov.com/tampa/ff0baa7f-cfd2-4e5f-9094-189c84b0ca98/published/ib-4Hif6A?currentPageId=TOC

- E-News
- Contact Economic & Business Development

The information on many of these topics are helpful but not particularly detailed and are generally out of date. On the other hand, the quarterly Economic Development Activity reports provided by OEBD are very thorough. The Target Industries section, however, is very weak and only features some prominent local employers.

Missing from the website are some important features:

- A list of the largest employers (the user should not have to download an Economic Development Activity report to find this information)
- A "Site Finder" utility with searchable fields (available property by type)
- Photography and video footage of the City by quadrant
- A library of video interviews with local employers and civic leaders (ambassadors)
- Current and relevant labor force data
- Social media coordination
- Link to Opportunity Zones databases (HUD, OpportunityDb, etc.)

In general, the website is not aesthetically pleasing or very current in graphic layout. Rather than serve as a simple repository of reports and also follow the graphic format of other departments, a new stand-alone Economic Development website should be created. Some examples of superior website design in economic development include:

- One Columbus (https://columbusregion.com/)
- Choose Folsom (https://choosefolsom.com/)
- Elevate Rapid City (https://www.elevaterapidcity.com/)
- San Diego Regional EDC (https://www.sandiegobusiness.org/)
- Charlotte Regional Business Alliance (https://charlotteregion.com/)
- Kingman Economic Development (https://www.choosekingman.com/)
- Invest Alberta (https://investalberta.ca/)

Role of an EDO on Planned Infrastructure on Capital Projects

The Government Finance Officers Association (GFOA) recommends that local governments recognize the value of public infrastructure as an Economic Development Strategy. "Economic development strategies provide the context for policies, programs and capital investments that governments undertake to attract and retain business and residents, increase employment, promote private investment and influence the type and location of development within a community. Development potentially increases demands on existing transportation and utility infrastructure as well as on schools, parks and public safety facilities and services. Therefore, successful economic development strategies require coordinated long-term capital planning to ensure that the necessary infrastructure is in place to support development."[10]

GFOA recommends that economic development strategies and capital improvement planning should be coordinated and integrated within and among governments. Specifically, governments should do the following:

- Align the organization-wide goals and objectives for both the Capital Improvement Plan (CIP) and economic development strategies.

- Evaluate potential impacts and benefits using tools such as cost/benefit and economic impact analysis. These analyses should be incorporated into capital plan development and updated on a regular basis.

- Integrate economic development and capital planning strategies into the organization's master plan, comprehensive plan, and long-term financial plan. To ensure consistency with other efforts, also include significant collaboration between departments and/or governing boards/commissions within the jurisdiction and between other jurisdictions in the region.

- Coordinate the timing of economic development initiatives with related capital infrastructure projects, recognizing that most capital plans span a five to ten-year period.

- Recognize the value of public infrastructure as an economic development strategy such as investments in utility and transportation capacity, physical improvements to a downtown, or new cultural and recreational facilities. However, these investments should not be made

[10] Government Finance Officers Association; Coordinating Economic Development and Capital Planning; Sept. 28, 2018; https://www.gfoa.org/materials/coordinating-economic-development-and-capital-planning

at the expense of maintaining existing infrastructure and facilities.

- Estimate the impact of development on existing assets, ongoing maintenance, and full lifecycle costs of new capital assets: Include these costs as part of the cost/benefit analysis of the development proposal.

- Identify appropriate opportunities for developers to fund capital assets. Where feasible, encourage public-private infrastructure partnerships (P3) for roadways, storm water, water or sewer, or other improvements.

Conclusions

Organizational Structure and Funding

Given that the larger cities have recognized the importance of economic development, this fact should be stressed to the Cape Coral leadership. Smaller competitive cities have not necessarily expanded the role of their economic development programs, but marked increases in budgets for these areas appear to be indicative of changes that will occur in the future.

In this regard, we recommend the elevation of the OEBD to full department status, with some use of the General Fund to be allocated for the development of incentive packages, enhanced marketing programs, speculative development of catalyst projects, and increased staff. In the immediate future, the creation of a grant writing position is vital so that additional funding streams for OEBD operational budget can be achieved. Our initial recommendation is the increase in funding by at least **50%** of the current allocation.

Additionally, it might be better to move the CRA under OEBD in the new department. The CRA is a stand-alone department now in Cape Coral, but for the development of incentives and other economic development strategies, having a common level of interest with a single point of leadership could ensure more integration of resources and outcomes. In many of the competing cities evaluated above, CRAs are administered by the EDO.

Economic Development Tools

We recommend that the City of Cape Coral retain a recognized graphic designer to create a more visually pleasing and useful website including a mobile app that utilizes the information generated in our study to present Cape Coral to prospective employers. Additionally, as the City has no tourism department and relies on Lee County or the State of Florida for this support, the economic development site will likely also need to provide a dual resource for new visitors as the introduction of Cape Coral as a tourism destination. For this reason, the website will require a level of graphic quality that is missing in the current design.

Role of an EDO on Planned Infrastructure on Capital Projects

As Cape Coral expands northward to accommodate new population growth, utility and roadway capital expenses continue to escalate. Presently, housing expansion supplies the revenue for water and sewer services through special assessment. But for speculative development of new commercial, industrial, or institutional properties, the City may become responsible for the full cost burden. To offset these costs, the City can employ the use impact fees. While this use is available to the City, in all likelihood, the abatement of such fees as incentives for private investment may result in enhanced commercial development activity.

The role of the OEBD should be one of mediator for capital expense outlays, helping to demonstrate the viability of anticipated spending in view of strategic directions the City is planning to navigate in the future. Judicious use of Economic Impact Analysis (EIAs) can be quite beneficial in helping to chart that course. EIAs are the means that job creation, direct/indirect/induced benefits, and tax revenue can be evaluated simultaneously to arrive at positive or negative recommendations.

During our engagement with the City of Cape Coral, we will have employed EIAs on many subjects. Our recommendation is that a representative of the OEBD be educated on the use of IMPLAN software and that an annual subscription be purchased for use by the City for ongoing EIA analyses. DCG Corplan personnel can be available to help with training for the new users in the economic impact analysis software program.

4.b – Effective Economic Development

Accredited Economic Development Organization (AEDO)

One of the most easily achievable paths toward effective economic development is to demonstrate organizational excellence. The International Council of Economic Developers (IEDC) is the premier US membership group of Economic Development Organizations (EDOs). The City of Cape Coral Economic Office of Economic & Business Development (OEBD) is already member in good standing with IEDC but we recommend elevation of the office to an Accredited Economic Development Organization (AEDO).

The AEDO program recognizes the professional excellence of economic development organizations (EDOS). The AEDO Program provides EDOs with independent feedback on their operations, structure, and procedures. With the AEDO recognition, the City's Economic Development Office will become part of an elite network of EDOS who have gone through the accreditation process. The AEDO status indicates leading authority status of economic-related issues.

Of the 75 North American agencies with AEDO accreditation, only six are in the State of Florida:

- Business Development Board of Palm Beach County
- City of Miramar Department of Economic Development and Housing
- Clay County Economic Development Corporation
- Sumter County Economic Development
- Tampa Bay Economic Development Council
- The Beacon Council (Miami)

Fast Tracking Permitting

A common issue with most communities is the time that development permitting requires, often delaying project timelines and incurring greater costs to the applicant. While the goal is to improve the approval time by a fast-tracking method, we must recognize that building code and fire safety reviews cannot be subject to shortcut. What can be expedited, however, is the coordination between various departments and some pre-permitting by land use and zoning conditions, plus on-line management of the permitting process.

Cape Coral has made good efforts at streamlining the process through its Development Services Dept. The online permitting resource featuring the EnerGov Citizen Self-Service plugin (CSS) seems to be an efficient approach toward permit review and approval. What is not apparent, however, is the behind-the-scenes process including interdepartmental coordination. Retaining an expert in the identification of bottlenecks and efficiency improvements might be in order to assist with the process.

For Cape Coral, review of some examples of successful fast-tracking by other public agencies may shed light on strategic improvements for the City (see Task 4 – Appendices for more detailed descriptions):

Loudon County, VA[11]

Fast Track is available for targeted industries including information communication technology, federal government contracting agencies, aerospace and airport supportive businesses, and projects supporting those industry groups. Other commercial projects meeting the criteria may also be considered. Key feature include: Dedicated Project Manager; Top of the List-- reviewing agencies will move the project to the head of review lines for the entire development review process; Special Review Team; and, Aggressive Timelines.

Montgomery County, MD[12]

The Commercial Fast Track permit process is a quicker plan review service for small-scale interior alterations of existing commercial buildings. While standard commercial building permit applications can take four weeks to complete the first set of reviews, a complete and compliant Commercial Fast Track permit application will receive comments, or be ready for permit issuance, within 3 business days from initial intake or processing of the permit application.

Empire State Economic Development, NY – Shovel-Ready Grant Program[13]

Under New York's FAST NY Shovel-Ready Grant Program, Empire State Development will provide up to $200 million in grants to prepare and develop sites statewide to jumpstart New York's shovel-readiness and increase its attractiveness to large employers, including high-tech manufacturing, particularly semiconductor manufacturing, interstate distribution and logistics

[11] Loudon County, VA; https://biz.loudoun.gov/fast-track-process/#:~:text=The%20Fast%2DTrack%20Commercial%20Incentive,a%20central%20point%20of%20contact.
[12] Montgomery County, MD; https://www.montgomerycountymd.gov/DPS/Process/combuild/commercial-fasttrack.html
[13] Empire State Shovel-Ready Program; https://esd.ny.gov/fast-ny

businesses. The program will help diversify New York State's economy while propelling new investments for businesses, communities and job creation.

Georgia GRAD Certified Sites[14]

The Georgia Ready for Accelerated Development (GRAD) Program offers 60 industrial certified sites that are ready for fast-track construction projects through advance due diligence. Since the program's inception in 2008, more than 8,000 jobs have been created on GRAD sites. The GRAD Certification and Certification Renewal due diligence requirements include surveys of a site's topographical, geotechnical, wetlands and environmental conditions. A full description of the certification and certification renewal processes and all other requirements are provided below. The GRAD Certification is valid for thirty-six (36) months after which the site will be subject to renewal.

HuntleyFirst, IL[15]

The Village of Huntley's permitting process provides for fast permitting and development approvals. Fast tracking demonstrates Huntley's understanding that time is money. Efficient and timely approvals minimize construction related costs and represent an important economic advantage.

Qualified sites are parcels:

- Listed for sale or lease
- Appropriately zoned
- Meet zoning and comprehensive plan requirements
- Served by utilities
- Fulfill the requirements of the development application
- Maintain access to existing road networks

One-Stop Shop for Business Development

For Cape Coral, the growth of small business, especially home-based establishments, is beginning to be a major factor. According to the Institute for Justice (IfJ) [16], "*In cities across the country, the*

[14] https://www.georgia.org/grad-certified-sites
[15] https://www.huntleyfirst.com/doing_business_in_huntley_-/fast_track_permitting.php
[16] Institute for Justice; Barriers to Business – How Cities Can Pave a Cheaper, Faster, and Simpler Path to Entrepreneurship; https://ij.org/report/barriers-to-business/

path for getting a business up and running is riddled with steep costs, frustrating delays, and confusing steps. Not only must entrepreneurs satisfy a tangled web of regulatory requirements, but they also must often do so without receiving clear guidance from local officials. Red tape on the books and officials' poor communication and lack of transparency all contribute to the hurdles small businesses face from local government."

The IfJ suggests that establishing a cheaper, faster, and simpler regulatory environment for small businesses is possible. Municipal leaders can use actionable reforms and best regulatory practices as a roadmap for streamlining the process in their community. Recommendations include:

- Cut fees to lower the cost of doing business. This will open a pathway to entrepreneurship for all residents, including those from disadvantaged communities.

- Streamline the compliance process to help entrepreneurs navigate rules on the books, allowing entrepreneurs to invest time in getting their business ventures off the ground rather than complying with unnecessary regulations.

- Reduce the number of steps for starting a business to ensure that entrepreneurs, especially those without the resources to hire lawyers or expediters, do not get caught in the procedural weeds.

In the opinion of the IfJ, "*the creation of a **one-stop shop** to support new and existing businesses can be one of the best things a city can do to make it a more friendly environment for small businesses. Ideally, it's in a centralized location where they can find all the information about what is required to start a business, rather than having to navigate through multiple departments and agencies. It's a place where an entrepreneur can go, and in a single visit, get all the permits, licenses, approvals, or any other kind of permission that they need to legally operate their business.*

One-stop shops should provide a streamlined process that can help entrepreneurs cut through the red tape and get their businesses off the ground more easily. The idea is that you're streamlining the process, you're making it more efficient, you're cutting down on the amount of time that an entrepreneur has to spend dealing with bureaucracy."

As an example of the IfJ's analysis or 20 American cities, the total effort to establish a bookstore in Jacksonville, FL currently requires the following:

- A total application cost of **$2,139**
- **11** distinct fees
- **7** municipal agencies' review

- **9** in-person activities
- **9** individual forms
- A total of **37** discrete tasks required by the entrepreneur

Conclusions

Accredited Economic Development Organization (AEDO)

We recommend that the requirements for AEDO be reviewed and that a self-examination by the Office be undertaken to determine what milestones might be needed to be reached to achieve AEDO confirmation. The IEDC publishes the "Guide to Becoming an Accredited Economic Development Organization"[17] which explains the process. Once certified, the OEBD will be invited to take part in IEDC's annual meeting of AEDO's. In addition, as an accredited organization, the OEBD will receive exclusive use of the AEDO logo for letterhead, business cards, promotional materials, and website. Accredited organizations are also profiled in IEDC publications including ED Now and Economic Development Journal.

Fast Tracking Permitting

From review of the above examples, an underlying theme appears to be pre-certifying sites and properties for targeted uses. Review of the City's CapeIMS reveals that data encoding includes the Future Land Use of any parcel. What is needed on the OEBD website is a search tool (Site-Finder) that will allow the user to enter a land use category and then display all available properties on the map. A downloadable database of the selections should be able to provide a list of the type of permits needed, the links to those applications from Development Services, and an approximation of the time required to obtain approvals if the intended use is executed. Another possibility is the illustration of available incentives or benefits provided (for example within Cape Coral's two Opportunity Zones).

What is missing at this point, however, is a review of all future land uses in commercial and industrial lands that focus on the goals of the new targeted industries developed in Task 3. We will address this issue in Task 9 – Land Use and Real Estate Analysis.

One-Stop Shop

[17] IEDC Guide to Becoming an Accredited Economic Development Organization; https://www.iedconline.org/clientuploads/Pro%20Dev/AEDO/IEDC_AEDO_Guide.pdf

The City of Cape Coral could effectively create a One-Stop Shop for Business Development perhaps in a vacant downtown storefront or within a space in City Hall that would have mostly virtual self-services, minimal staff, printed materials for take-home, and an accompanying on-line presence. The goal would be to facilitate all the requirements necessary to establish a new business and to ease the level of confusion by applicants.

It is likely that new business creation in Cape Coral follows a similar path. To change this in the future, Cape Coral's One-Stop Shop for Business Development would be administrated by the OEBD which would coordinate its activities with other departments. As the OEBD current offers, the Ombudsperson Services would have a greater role in overseeing the approval process. OEBD's careful record-keeping of applicants' costs, numbers of steps, and success rate would form the basis for a database of business development metrics. Analytical results would then help to fine-tune the process for streamlined business development growth.

4.c – Task 4 Progress Report/video conference

We conducted a video conference with the Project Review Committee on February 21, 2024. Work product to date was discussed and the materials covered were previously uploaded to the website.

Page Not Used.

Economic Development Strategic Plan - RCM2342AS

Task 5 Report

prepared for:

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Task 5: Incentive Program

5.a – Review of Existing Programs

Cape Competes Incentive Programs

The use of incentives has been a traditional hallmark for economic development nationwide. There are criticisms, however, on the effectiveness of incentive use. The utilization of incentives, therefore, should be a measured practice that does not impose unrealizable financial burdens on the local issuer. The State of Florida offers many incentive programs as does Lee County. The City's Cape Competes incentives are more targeted for local investment. Many of these are new or proposed programs with limited or no application statistics available:

- Ad Valorem Tax Incentive Program
- Breaking Barriers to Business (B2B) Program
- Business Infrastructure Grant
- Cape Collaborates – Small Business Partner Program
- CreativeCape Arts Program
- Demolition Assistance Grant Program
- Enhanced Property Value Recapture Grant

Ad Valorem Tax Incentive Program

This incentive program offers a limited exemption from payment of municipal property taxes to qualified businesses/developers looking to invest and create new jobs. The exemption applies to the assessed value of new improvements and tangible personal property. The exemption will not be applicable to the land upon which the business is located.

The program has three tiers of incentives with varying wage thresholds and capital expenditure goals. These range from 100% to 125% of the average annual private sector wage, and from $5 million to $20 million in expenditures.

<u>Tier 1: 5 year, 50% tax incentive</u>

- 10 or more full-time manufacturing jobs
- 25 or more full-time jobs in businesses with less than 50% sales force

- 50 or more full-time jobs in office of new business

Tier 2: 7 year, 50% tax incentive

- 25 or more full-time manufacturing jobs
- 50 or more full-time jobs in businesses with less than 50% sales force
- 50 or more full-time jobs in office of new business

Tier 3: 10 year, 50% tax incentive

- 75 or more full-time manufacturing jobs
- 75 or more full-time jobs in businesses with less than 50% sales force
- 75 or more full-time jobs in office of new business

Breaking Barriers to Business (B2B) Program

The Breaking Barriers to Business (B2B) program is intended to support economic development and growth in the South Cape area by providing financial assistance to businesses and developers who are committed to building, expanding, or renovating their facilities in compliance with the City's regulations. Through the B2B program, eligible businesses and developers can receive grant assistance to cover the costs associated with site development, building construction, renovation, and other related expenses.

Approximately $250,000 has been made available under the program, which will act as a reimbursement-based program providing up to 20 percent of capital costs for eligible capital improvement projects.

Projects exceeding $25,000 are eligible for a grant of 20 percent of capital costs, not exceeding $50,000. To be eligible, projects must have a minimum capital investment of $25,000. Land improvement and development costs including:

- On-site infrastructure design and construction
- Right-of-way improvements required by new construction or on-site improvements
- Landscaping and road beautification costs
- Water and sewer connection fees
- Telecommunication connection fees and costs
- Drainage facilities in conjunction with new construction or on-site improvements
- Construction of new curbs
- Curb cuts, medians, shoulders, and sidewalks

- Relocating utilities to accommodate new construction or on-site improvements
- Other types of site development expenses that may be approved by the city
- Payment of impact, Contribution In Aid of Construction (CIAC), and special assessment fees assessed by the city

Business Infrastructure Grant

The Business Infrastructure Grant Program encourages new non-residential construction, building/facility expansions or renovations for office; life sciences, healthcare, biotechnology, pharmaceuticals, and medical devices; information technology, telecommunications, communications and cybersecurity; financial and professional services, banking, insurance, securities and investments; corporate or regional headquarters; engineering, legal, accounting and consulting; manufacturing, logistics and distribution; marine-related industries and wholesale distribution and warehousing. The program provides incentives to developers to assist with site development costs.

Eligible expense include:

- Land improvement and development costs, including infrastructure design and construction, road improvements required by new construction or on-site improvement, landscaping and road beautification costs, water and sewer connection fees, telecommunication connection fees and costs, drainage, and other types of site development expenses that may be approved by the city.
- Payment of impact, permitting, licensing, and special assessment fees assessed by the city.

<u>Award and Funding Limits</u>

- Projects with a capital investment (excluding land) of $1 million or less: 5 percent of eligible costs not to exceed $50,000.
- Projects with a capital investment (excluding land) exceeding $1 million: 10 percent of eligible costs not to exceed $250,000.

Cape Collaborates – Small Business Partner Program

This program will encourage new small business start-ups, expansion of existing businesses and relocation of out-of-market businesses to the city by providing eligible small businesses with increased access to capital through a zero-interest, five-year forgivable loan. The grants are for:

- Capital improvements associated with new construction, renovation, or tenant improvements.
- Payment of impact, permitting, and special assessment fees assessed by the City or other public entity.
- Capital machinery, manufacturing equipment, furniture, and fixtures.
- Business advertising

To be eligible, businesses must be for-profit, privately held and in or relocating to, the City of Cape Coral with 10 full-time employees and average annual gross revenues of $1 million or less per year for the last two years. Be engaged in the following industries, occupations, or services:

- Administrative services
- Construction trades
- Finance and insurance
- Health care services
- Information services technology, telecommunications, and communications
- Manufacturing
- Marine industries
- Professional services
- Technical services
- Veterinary services
- Warehousing and logistics
- Wholesale trade

Award and Funding Limits
Minimum: $5,000; Maximum: $50,000

CreativeCape Arts Program

The CreativeCape Arts Incentive Program seeks to foster cultural development in the city, but more specifically, within the City of Cape Coral Community Redevelopment Area. The City, and CRA should the CRA adopt this Program, may provide incentives to individuals, nonprofit cultural organizations, and other entities to support arts and culture businesses operating in or relocating to the city.

Applicants may be one of the following:

- A for-profit business or non-profit organization primarily engaged in music, dance, drama, theater programs, films, festivals, creative writing, literature, painting, sculpture, folk arts, photography, crafts, public media, and the execution and exhibition of other cultural art forms
- A developer seeking to build or renovate buildings specifically designed to house businesses in the creative industries listed above

Eligible expenditures include:

- Acquisition, development, construction, renovation, expansion, or improvements of real property within the Community Redevelopment Area, including live/workspaces

- Assistance and support to individual artists and organizations with expenses associated with one or more specific cultural art programs, activities, events, or performances on a specified date(s) or time frame(s).

Award and Funding Limits
Minimum: $5,000; Maximum: $250,000, but in no event shall the incentive amount exceed 25 percent of total project

Demolition Assistance Grant Program

The Demolition Assistance Grant Program is an initiative by the CRA designed to encourage the replacement of aging and blighted structures in the South Cape area. The purpose of this program is to provide grant assistance to property owners who are looking to invest or reinvest in the South Cape Community Redevelopment Area by replacing existing structures and to property owners who have an interest in making their properties available for development. The program seeks to accomplish the following goals:

- Revitalize underutilized and deteriorated areas and to eliminate slum and blight.

- Increase tax increment funding within the Community Redevelopment Agency (CRA) area of southeastern Cape Coral by promoting investment, economic growth, and the modernization of structures.

- Enhance the overall appearance of buildings to improve attractiveness to residents, visitors, and potential investors.

Grant Award

The Demolition Grant Program will provide grants covering 100% of demolition costs up to $50,000. Grants will be awarded to cover demolition costs exceeding $50,000 using a formula that combines $50,000 with 50% of expenses over $50,000; the total grant amount shall not exceed $75,000.

Enhanced Property Value Recapture Grant

The Enhanced Property Value Recapture Grant is designed to attract larger-scale private capital investment and/or redevelopment into a mixed-use or nonresidential project site to achieve:

- Creation of a destination, town center or mixed-use development
- Redevelopment of properties within the Community Redevelopment Area
- Expansion of the tax base
- Generation of employment opportunities
- Attraction of targeted industries and businesses

Utilizing a "base year" assessed property value (from the Property Appraiser's database) for the project, a percentage of the incremental increase in ad valorem taxes on real and/or tangible personal property paid by the Project above the base year amount is available as a grant to incentivize the project.

Eligibility Criteria

Proposed projects must provide proof of a commitment by a financial institution or equity partner(s) financing the construction, equipping, furnishing and completion of the Project. The applicant/developer must invest a minimum of $10 million in construction or renovation (excluding land). The following are eligible project requirements:

- New construction of non-residential or a mixture of uses containing a combination of residential dwellings with commercial retail, service, or office uses or any combination thereof that generate additional municipal ad valorem tax revenue.
- Mixed use projects located outside of the Community Redevelopment Area provided that the non-residential component, excluding fast food restaurants, gas stations, and public/outdoor storage, consists of a minimum of 20 percent of the square footage of the project
- Light industrial, industrial, warehousing and logistics developments

The incentive award applies only to taxes levied city-wide by the city unless the project is located within the CRA. The incentive award rebate shall not apply to taxes levied by the county (unless within the CRA), a municipal services taxing or benefit unit (MSTU/MSBU), special assessments levied by the City or other public entity, the Lee County School District, a water management district, or any other special district or to taxes levied for the payment of bonds or taxes authorized by a vote of the electors pursuant to Section 9(b) or 12, Article VII of the Constitution of the State of Florida.

A maximum of 20% of the total project cost, excluding property acquisition, will be supported by incentive revenues. Total project cost is the cost of development of the project including all, site development, and public infrastructure, and building and site amenity costs necessary to complete the project.

Award Basis

The table below identifies the maximum amount eligible as an incentive award and the associated incentive period based upon the projected taxable value following the project's completion as determined by the Lee County Property Appraiser's office.

Projected Taxable Value	Maximum Rebate %	Incentive Period
$10,000,000-$24,999,999	50%	10 years
$25,000,000-$44,999,999	75%	15 years
$45,000,000 - $99,999,999	90% - 95%	CRA – Remaining Life City - 20 Years
$100,000,000 and beyond	95%	25 Years

Comparison of Competing Incentive Programs

City of Fort Lauderdale

Non-residential facade improvement program (NRFIP)

To eliminate slum and blight, remove deterioration; update exteriors of existing buildings in a manner that improves conditions of non-residential areas. Eligible locations in the CRA Area can receive up to 75% of costs not to exceed $125,000.

Property And Business Improvement Program (PBIP)

Eliminate slum and blight, remove deterioration, retrofitting and rehabilitation of structures to remove undesirable uses, improve the "energy efficiency" of existing buildings in the CRA, or renovations designed to bring the structure into compliance with the current building codes. Eligible properties can receive up to 75% of costs not to exceed $225,000.

Streetscape Enhancement Program (SEP)

To enhance the exterior public space beginning at the face of a building extending to the adjacent right-of-way ("streetscape") with high quality urban and environmental design that creates a sense of place and eliminates slum and blight. Eligible properties can receive up to 70% of costs not to exceed $500,000.

Development Incentive Program (DIP)

This program seeks to eliminate slum and blight by attracting new businesses to the CRA or existing businesses to expand within the CRA. The DIP award (with no minimum or maximum amount) will provide a forgivable loan or low interest loan to assist the eligible project.

Property Tax Reimbursement (PTR)

Eliminate slum and blight, remove deterioration, update existing buildings, and encourage new investment/development with an emphasis on enhancing the overall CRA, improving the quality of existing buildings within the CRA, and attracting new construction to the CRA. Eligible properties can receive reimbursement of ad valorem property taxes paid on a five-year descending schedules from 95% to 75%.

Affordable Housing Incentives

- Expedited Review: Site Plan Level II (DRC), with City Commission Request for Review
- Up to a 200% density Increase: two additional increments of 50 dwelling units per acre, up to 200 dwelling units per acre.
- Building height allowance of between 110 to 150 feet.
- 30-year deed restriction
- Citywide incentive reducing parking requirements to one parking space per affordable housing unit.

Ad Valorem Tax Exemption (10-Year Tax Exemption)

City of Fort Lauderdale Tax Exemption for Historic Commercial Properties for a fifty percent (50%) reduction in City property tax for designated historic resources that are used for commercial or non-profit purposes.

City of Orlando

Small Business Façade, Site Improvement and Adaptive Reuse Program

Provides a matching grant up to $50,000 reimbursement of costs for facade, site and building improvements to underutilized properties located in the City of Orlando.

Business Assistance Program

Provides a matching grant up to $20,000 to off-set permit fees, impact fees and right of way infrastructure improvements for new and expanding businesses.

Targeted Site Revitalization Pilot Program

Provides a 10-year, 50 percent real property tax refund on the city portion of the new tax increment generated by a qualifying project.

Orlando Technology Community Support Pilot Program

Provides a matching grant up to $10,000 for the development of tech focused events and programs that will unite the tech community and workforce. This program is administered by the Orlando Economic Partnership.

DTO Retail Program

The DTO Retail Program activates spaces within the downtown Orlando Community Redevelopment Area and establish the Area within Downtown Orlando as a retail destination, to attract locals and visitors to visit downtown Orlando as well as attract new retail and encourage expansion of existing retail by reimbursing costs associated with interior buildout and rent of a newly leased property. Personal service businesses are eligible for $50 per square foot up to $150,000.

DTO Restaurant Program

The DTO Restaurant Program activates spaces within the downtown Orlando Community Redevelopment Area and establish Downtown Orlando as a foodie destination, to attract locals and visitors to visit downtown Orlando as well as attract new restaurants and encourage expansion of existing restaurants by reimbursing costs associated with interior buildout and rent of a newly leased property. Eligible food service restaurants can receive up to $25 per square foot with a not to exceed funding amount of $100,000.

DTO Facade Program

Commercial Buildings located within designated areas of the CRA shall be eligible for funding for façade improvements of up to $100,000 or 50% of the total façade improvements, whichever is less.

Minority/ Women Entrepreneur Business Assistance Program – MEBA
Provides up to $40,000 financial assistance for expenses related to new, existing and expanding qualifying businesses located in the Business Assistance Area.

STRIVE Orlando Program

The STRIVE Orlando Program's purpose is to create a new performance-based local job incentive program to assist in advancing broad-based prosperity in the City of Orlando and Greater Orlando region. A base, per job, incentive amount of up to $500 is available to companies paying at or above 100% of the median wage.

Urban Job Tax Credit Program

Provides up to $2,000 for each new job created as a tax credit toward either Florida Corporate Income Tax or Florida Sales and Use Tax.

Orlando Economic Enhancement District - Brownfields Program

Provides up to $500,000 in tax credits and tax refunds for the cleanup and rehabilitation of sites potentially contaminated with hazardous materials.

Green Building Incentive Program

The Green Building Incentive Program (GBIP) encourages developers to build sustainably through a City of Orlando property tax rebate. This 5-year pilot program provides a performance-based one-time rebate incentive at three levels:

- LEED Silver receives 50% tax increment rebate
- LEED Gold receives 75% tax increment rebate
- LEED Platinum receives 100% increment rebate

City of Orlando Historic Preservation Tax Exemption Program

The City of Orlando provides a 10-year exemption for qualifying property owners who renovate historic landmarks or property in historic districts. The exemption is for the entire site, however at least $2500 must be allocated for preservation or maintenance of the front facade.

City of Palm Bay

Ad Valorem Tax Abatement

New and expanding businesses: 50% or each year the exemption is claimed.

Building Permit Fee Reduction Program

Businesses retaining or creating a minimum of ten (10) full-time jobs and constructs a new building, expands its existing building footprint, or makes interior renovations to an existing structure to accommodate business growth, is eligible for a seventy-five percent (75%) reduction of the building permit fee retained by the City of Palm Bay.

Commercial Property Enhancement Program (CPEP)

The Commercial Property Enhancement Program (CPEP) is a performance-based reimbursement grant awarded to applicants to encourage private investment and improvements to the exterior frontage of commercial properties located within the city limits of Palm Bay. The Program requires a minimum $10,000 investment by the Grantee. The City will provide matching funds in an amount not to exceed $10,000.

City of Pompano Beach

Real Estate Development Accelerator (REDA)

Projects in the City of Pompano Beach Community Redevelopment Agency (CRA) Northwest area may be eligible for a tax incentive. The REDA program will be available for a six-year period, on a descending scale for up to 80% of the costs associated with early-stage development activities.

Relocation and Development Incentive Program

The program is designed to support difficult redevelopment projects that cannot be accommodated under other CRA programs. Funding initially will be TIF funds. Once plans are completed for the targeted areas, additional funding sources will be required including but not limited to CRA or other revenue sources. The program will help to re-utilize vacant buildings and lots, acquiring properties with absentee ownership, tenant relocation, and more.

Strategic Investment Program (SIP)

The program is designed to enhance the pace, content and quality of commercial and retail development in the CRA area. The criteria for the final determination of projects approved for funding and the specific amount allocated to each project under the Strategic Investment Program follow a three-step process. The maximum amount allotted under this program is $150,000.

Commercial Interior Build-Out Assistance Grant Program

The program is designed to assist new or existing (less than 6 months) commercial, retail and restaurant businesses by providing assistance for capital improvements that stay with the building. The program is open to business owners operating within the following target areas within the Northwest CRA District. The CRA will provide a grant for 80% of the project cost up to a maximum CRA grant of $25,000 for eligible projects.

Facade & Business Site Improvement

The program encourages business owners and/or property owners in the Northwest CRA to enhance their existing business sites through exterior improvements. Approved applicants may receive reimbursement for 80 % of their eligible project costs, up to a maximum award of $50,000 per address.

City of Port St. Lucie

Expedited Site Plan Review and Fast Track Permitting

Qualified companies are eligible for expedited site plan review and fast track permitting. Our Land Development Team will coordinate with your company to streamline the development review and permitting process to ensure your development is completed on schedule.

Impact Fee Mitigation

The economic development impact fee mitigation program is to mitigate any real or perceived disadvantage occurring from the imposition of impact fees to certain Qualified Target Industry businesses. The program is intended to provide the City Council with the opportunity, in its sole discretion, to grant impact fee mitigation to Qualified Target Industry Businesses.

Job Growth Investment Grant (St. Lucie County)

St Lucie County offers the Job Growth Investment Grant for new and existing businesses that are eligible under Florida's Qualified Targeted Industries. The Board of County Commissioners may grant awards in the range of $1,500 to $3,000 per new job with a minimum of 10 new jobs created. A salary requirement of 107% of the County's current hourly wage is also required to be eligible for this program.

City of West Palm Beach

Relocation and Development Assistance Incentive Program
The CRA may assist with relocation and development of certain uses to allow for a more desirable or upgraded use. This program provides the incentives necessary for redevelopment, including tenant relocation, acquisition, build-out and rehabilitation or renovation of existing properties.

Real Estate Development Accelerator Program (REDA)
This program is designed to offer incentives to projects over $5 million in the form of land mark-down, infrastructure improvements, Tax Increment Financing or any other type of incentive for development of large scale projects.

Housing Investment Program
Developers of residential projects investing up to $5 million may be eligible for development assistance.

Strategic Investment Streetscape Program (SISP)
For commercial or mixed-use projects up to $5 million, developers may be eligible for up to 50% of the cost of streetscape improvements.

Strategic Investment Program (SIP)
Based on a formula that considers the amount of tax increment generated from each project, commercial and mixed-use projects up to $5 million may be eligible for development assistance.

Contributing Structure Rehabilitation Grant Program
This grant provides 85% of a contributing structure rehabilitation project up to $75,000 in the historic Northwest district.

Merchant Assistance Program
The Program is available to restaurant and retail businesses that have been located in the Northwest Target Area for three (3) years or more. The CRA will provide a grant of up to $15,000 per business inclusive of a consultant’s time for training and for minor aesthetic improvements to the interior of a business.

Lee County Incentive Programs

Industrial Development Revenue Bonds

Industrial Development Revenue Bonds (IDRBs) are long-term, tax-exempt, low-rate financing of capital requirements for new and expanding manufacturing facilities in Lee County. IDRBs pay $3 million to $10 million, and the borrower is solely responsible for principal and interest repayment.

Gold Key Grant Program

The Lee County EDO and Lee County Industrial Development Authority offers financial assistance to small businesses leveraging in the US Commercial Services Gold Key Matching service. For businesses that seek overseas agents, distributors, sales representatives and business partners, the Gold Key Matching Service can arrange connections with pre-screened trade partners and help with travel, accommodations, interpreters, and clerical service.

Develop North Fort Myers

The North Fort Myers Pilot Program is a reimbursement-based incentive program that is paid after the completion of the qualified project. For those developing in the North Fort Myers mixed-use overlay area and producing a significant increase in building value, the following incentives may be available:

- Reduced permit, impact, and water/sewer connection fees
- Reimbursement of up to 50% of demolition costs
- Reimbursement of up to 50% of eligible infrastructure improvements (stormwater retention, water/sewer, landscaping, irrigation, sidewalks, exterior lighting)
- Reimbursement of up to 50% of eligible flood-proofing costs (water-sealing building openings)
- Reimbursement of up to 50% of building exterior/façade improvements
- Keystone grants of up to 20% of eligible costs for large projects

State of Florida Incentive Programs

The State of Florida currently has **63** incentive programs in eight categories as show below:

Program Category	# of Programs
Energy	5
Film and Production	1
Insurers and HMOs	3

Investment in Florida	**33**
Jobs	**7**
Machinery and Equipment	9
Other Assessments Paid	4
Other Taxes Paid	1
Total	**63**

Of the eight categories, the two that are of them most relevant to Cape Coral at this point would be: (1) Investment in Florda; and (2) Jobs. Some of the key incentive programs in these two groups are as follows:

Investment in Florida

Capital Investment Tax Credit

This credit is available to businesses in a designated high-impact sector (e.g., silicon technology, transportation industries, or solar panel manufacturing facilities). The business must establish a qualified project which results in a cumulative capital investment of at least $25 million. The project must be certified by the Florida Department Commerce. An annual credit may be claimed for up to 20 years in an annual amount up to 5% of the eligible capital costs generated by a qualifying project.

Community Contribution Tax Credit

A credit of 50% of a qualified community contribution (cash, property, or goods) to an eligible sponsor for a project, as defined in Section 220.03(1)(t), F.S., is allowable.The annual amount granted is up to $200,000 per business. The credit may be carried over for five years.

Entertainment Industry Tax Credit

This credit is available but must be approved by the Florida Department of Commerce. The credit may be carried forward for five years.

Live Local Program Tax Credit

Taxpayers may make contributions to the Florida Housing Finance Corporation and receive a dollar-for-dollar credit against corporate income tax or insurance premium tax.

New Markets Tax Credit

A credit equal to 39% of the purchase price of a qualified investment may be taken. The credit may be carried forward for five years.

Research and Development Tax Credit

Florida provides a corporate income tax credit to eligible businesses for certain qualified research expenses.

Scholarship-Funding Organizations – Tax Credits for Contributions

The Florida Tax Credit Scholarship Program allows taxpayers to make private, voluntary contributions to nonprofit scholarship-funding organizations and receive a dollar-for-dollar credit against specific Florida taxes, including the corporate income tax. For more information,

State Housing Tax Credit

This credit is available to private corporations that build low-income housing projects in urban areas. A credit of up to 9% is allowed of the eligible basis of any designated project for each year of the credit period for a taxable year.

Jobs

Experiential Learning Tax Credit Program

The Experiential Learning Tax Credit Program provides an incentive to qualified businesses for employing apprentices, pre-apprentices, and student interns for taxable years that begin within calendar years 2022-2025. The tax credit is $2,000 per apprentice, pre-apprentice, or student intern. The maximum tax credit per year is $10,000 (five apprentices, pre-apprentices, or student interns x $2,000 each). $2.5 million is available for each year of the program. The credit may be carried forwarded up to two taxable years.

Urban High-Crime Area Job Tax Credit

The Urban Job Credit Program provides an incentive for eligible businesses, located within designated urban areas, to create new jobs. The credit can range from $500 to $2,000 per qualified employee. The credit may be carried forward for five years.

Subtraction for Florida Employees Included in Calculation of Federal Employment Credits

This is a deduction for the amount of wages and salaries paid to Florida employees for the taxable year for which no deduction is allowed under Section 280C(a), Internal Revenue Code, relating to credit for employment of certain new employees.

Federal Incentive Programs

Federal Historic Preservation Tax Incentives Program

A 20 percent income tax credit is available for the rehabilitation of historic, income-producing buildings that are to be “certified historic structures”.

New Market Tax Credits

The taxpayer is eligible to claim a tax credit equal to 5 percent of its equity investment in the COE for each of the first three years and a 6 percent credit for each of the next four years (39 percent total).

Historically Underutilized Business (HUB) Zone

The HUB Zone Empowerment Contracting program provides federal contracting and sub-contracting opportunities for qualified small businesses located in designated areas.

The government limits competition for certain contracts to businesses in historically underutilized business zones. It also gives preferential consideration to those businesses in full and open competition. Joining the HUBZone program makes your business eligible to compete for the program’s set-aside contracts. HUBZone-certified businesses also get a 10% price evaluation preference in full and open contract competitions. HUBZone-certified businesses can still compete for contract awards under other socio-economic programs they qualify for.

Leading Examples of Innovative Incentives

Remote Workers

Tulsa Remote

Tulsa Remote (Oklahoma) is a private foundation working in partnership with the City of Tulsa to encourage remote workers to relocate to Tulsa. For home-based employees of companies who will continue operating from their homes, a one-time award of $10,000 is offered. To date, the Tulsa Remote has sponsored 165 new residents and generated over $300 million in direct employment income to the Tulsa economy[1].

[1] Tulas Remote; “Building a Knowledge Economy, Pone Worker at a Time”; https://23811891.fs1.hubspotusercontent-na1.net/hubfs/23811891/Tulsa%20Remote%20Economic%20Impact%20Report.pdf

Remote Shoals

Located in Northwest Alabama, Remote Shoals awards participants $10,000 cash. Payments are based on an initial 25% to help cover moving expenses, 25% after six months residency, and the final 50% after one year.

Savannah (GA) Technology Workforce Incentive

Established in 2020, employees (or the self-employed) who may have more geographical freedom can apply for reimbursement of moving expenses up to $2,000 after relocating to Chatham County.

Ascend West Virginia

Accepted applicants receive $12,000 for moving to West Virginia —$10,000 in monthly payments over the first year and $2,000 during the second year of residence. Other inducements include one free year of outdoor recreation (including free outdoor gear rentals!), access to free coworking spaces, and professional and social development opportunities.

Green and Sustainable Practices

Portland Percent for Green Grants

The Portland, OR Percent for Green grant program is open to community groups who would like to complete large-scale green infrastructure projects that provide broad benefits for watershed health and the community. Grants range from $20,000 to $150,000. Projects usually take about two years to complete.

South Carolina Solar Tax Credit

is one of the most generous out there. It offers a tax credit of 25% of the cost of a solar panel system, up to $35,000 or 50% of the taxpayer's tax liability for the year.

Self-Generation Incentive Program (CA)

This is a statewide California rebate made available to all solar customers who couple their panels with solar batteries. The rebate is for $200 per kWh of battery storage installed.

South Carolina Solar Energy Tax Credit

One of the largest state tax credits for solar in the entire country. It provides a tax credit in the amount of 25% of the system up to a maximum of $35,000 over ten years.

Jacksonville (FL) Battery Incentive Program

This program offers an upfront rebate of $2,000 to JEA customers–both residential and commercial–to help decrease the cost of installing a solar-plus-storage system.

St. Lucie County PACE Financing

A SELF Loan Program alternative financing solution to overcome the upfront costs of implementing energy-saving, renewable energy, and resilience projects in St. Lucie County, FL. Based on the Property Assessed Clean Energy (PACE) model, financing is secured by an assessment lien and is repaid as a line item on the property tax bill. This allows property owners to invest in longer-term, clean energy improvements that can generate positive cash flow and environmental benefits.

Investment Tax Credit (US)

The federal investment tax credit (ITC) is far and away the best solar incentive, providing 30% of solar project costs as a credit towards federal income taxes.

Portland, OR Ecoroofs

As part of the city's Grey to Green Initiative, the program has been developed with the goal of establishing 43 acres of ecoroofs, which are essentially lightweight, low-maintenance green roofs

Onondaga County, NY Green Improvement Fund

The Green Improvement Fund provides grant funding to commercial properties that install green infrastructure practices as part of a larger Combined Sewer Overflow (CSO) abatement program that seeks to eliminate 250 million gallons from the County system.

Montgomery County, MD RainScapes

The Montgomery County, MD RainScapes Rewards coordinates a rebate program used to meet part of its municipal separate storm sewer system (MS4) permit goals.

Philadelphia, PA Fee Discount

Philadelphia's Stormwater Fee System is a new program that offers a stormwater fee discount up to 80% of the impervious area charge or gross area charge, or both for customers who reduce impervious cover with green infrastructure practices. If retrofitted with green infrastructure, the Philadelphia Water Department will recalculate that property's stormwater fee.

Develop North Fort Myers Pilot Program (Lee County, FL)
This program in North Fort Myers offers up to 50% reduction in permit fees for items that include storm water retention and flood-proofing.

Healthcare & Life Sciences

Biotechnology Investment Incentive Tax Credit (MD)

IITC provides an income tax credit equal to 33% of an eligible investment in a Qualified Maryland Biotechnology Company (QMBC) up to $250,000 in tax credits, or 50% of an eligible investment in a QMBC up to $500,000 in tax credits if the QMBC is located in Allegany, Dorchester, Garrett or Somerset County.

Life Sciences Research and Development Tax Credit Program (NY)

Qualified life sciences companies may be eligible to receive a fully refundable credit based on qualified research and development expenditures incurred in New York State (NYS). The credit is 15% for a company that employs 10 or more persons and 20% for a company that employs fewer than 10 persons. The credit is capped at $500,000 per year for a lifetime cap of $1.5 million.

Texas Enterprise Fund (TEF)

The TEF has been created as a cash grants “deal closing” program to attract businesses and new technology jobs to Texas. Since its inception, TEF has awarded more than $118 million to life science-related companies, which have committed to create 13,706 jobs in Texas, or about $8,600 per job.

Summary

The Cape Competes list of incentives is a good example of how municipalities can recognize problems and implement solutions toward their improvement. Probably the most effective programs are the Ad Valorem Tax Incentive Program and the Enhanced Property Value Recapture Grant. These two programs focus on exempting the incremental property tax increase for new development.

While untested now, there may be some difficulties ahead in implementation of property tax exemptions as the Lee County Appraiser's Office is not yet prepared to adjust the value of improved properties. Florida Statute 196.1995 provides that "*the governing authority of the municipality, at its discretion, by ordinance may exempt from ad valorem taxation up to 100 percent of the assessed value of all improvements to real property…*[2]" which requires passage of referendum and adoption of ordinance.

The OEBD has indicated that the requirements have been enacted for the incentive. Lee County has suggested that rather than processing an adjusted valuation by use of the incentive, that Cape Coral utilize the General Fund to rebate the value of the incentive directly to the applicant. The Appraiser also suggested that the same mechanism be applied to the Enhanced Property Value Recapture which is already considered as a cash grant rather than an exemption.

Comparative Analysis of Competing Cities

From review of the incentive offerings by the six competing Florida cities, a total of **38** programs were identified. These incentive programs are grouped into 11 categories as shown below:

Incentive	# of Prgms
Property Improvement	12
Development Assistance	9
Property Tax Exemptions	3
Fee Reduction	3
Job Creation	3
Historic Preservation	2
Affordable Housing	2
Brownfields Remediation	1
Fast Track Permitting	1
Green Building	1

[2] Florida Senate; 2023 Statutes; https://m.flsenate.gov/Statutes/196.1995

Tech Development	1
Total	**38**

Many incentives focus on property improvement, development assistance, tax abatement, and permitting expediting. But an Important take away from this review is the limited number of job creation programs. Only two cities off an incentive dedicated to job growth: Orlando (2 programs); and, Port St. Lucie (1 program administered in conjunction with St. Lucie County).

In previous years, Cape Coral offered a different group of incentives shown below:

- Small Business Incentive Fund
- Cash Incentive Program ($1,500 per job for targeted businesses)
- Impact Fee Deferral Program (10-year deferral for roads and utilities)
- Shell Building Impact Fee Deferral – 36-month deferral for speculative buildings

In our view, these were also viable as inducements for new investment in the City. We believe that while incentivizing property owners and real estate developers is a good course of action, it must also be accompanied by supportive measures to attract prospective employers. One of the most effective incentive programs offered by the State of Florida was the Qualified Target Industry Incentive (QTI) which was ended in 2023. This program offered generous tax refunds for new company entry into Florida and was sunsetted by the Legislature after Florida's dynamic economic growth suggested that the incentive was superfluous.

Proposed Incentives

Target Industry Job Creation Grant

We would recommend that the former Cash Incentive Program be reinstituted as the Target Industry Job Creation Grant. This would be a performance-based incentive with multiple tiers of cash awards. The incentive must be applicable to both new incoming businesses and existing business in targeted sectors. The goals of the new program would be as follows:

- For up to 25 new employees: **$1,500** per job
- For 25 or more new employees: **$2,500** per job
- Bonus add-ons:
    - **$1,000** per job for businesses paying at least **110%** of the prevailing Cape Coral average annual wage
    - **$2,000** per job for businesses paying at least **125%** of the prevailing average annual

The incentives would be paid to employers who can demonstrate sustainability of employment and achievement of promised hiring goals. The cash award would be paid in a three-year installment after submittal by the grantor that employment and compensation levels were met.

Cape Blue Incentive

The thirst for sustainable Infrastructure that addresses resiliency is a common thread nationally. Cape Coral should lead Southwest Florida by instituting incentives that protect canals and water resources as its first priority. Water conservation is obviously a major need in the area as water levels are falling due to lack of adequate rainfall. It is reported that a 40-square mile section of North Cape Coral is sinking at the rate of one inch per year from over-pumping the aquifers for household water supply[3]. States like California have taken serious steps toward water conservation from years of drought conditions. Some interesting incentive program developed in Westen States include:

- Turf replacement rebate programs -- turf replacement programs are designed to incentivize citizens to replace lawn grass with water-efficient native plants and landscaping. Desert states like Arizona encourage citizens to xeriscape[4] their homes for maximum water conservation and offer turf replacement incentives of up to $3,000.

- Rain barrels and rainwater harvesting rebates – The City of Austin, TX offers a rebate of up to $5,000 for the equipment used in setting up rainwater harvesting system, which includes rain barrels. Not all municipalities allow rainwater systems to provide your household with drinking water, but this may be possible for gray water non-potable systems in Florida.

We propose a new Cape Blue incentive that will specifically promote water saving and storm water runoff control through bio-retention measures such as rain gardens, rainwater harvesting, stormwater gardens, tree boxes, xeriscaping, and permeable pavement. The Cape Blue program will encourage businesses and homeowners to reduce water usage and to mitigate storm water runoff. This is a 5-year incentive that will provide a cash grant at two levels:

[3] WGCU; https://news.wgcu.org/section/environment/2023-12-18/journal-north-cape-coral-slowly-sinking-due-to-over-pumping-for-citys-water-desalinization-plant
[4] Xeriscape - a style of landscape design requiring little or no irrigation or other maintenance, used in arid regions.

- **25%** reduction in water use OR **25%** stormwater run-off mitigation – starting at **$3,000** for the first year and decreasing to **$1,000** in the final year. Total payments will not exceed **$10,000**.
- **50%** reduction in water use OR **50%** stormwater run-off mitigation – starting at **$6,000** for the first year and decreasing to **$1,000** in the final year. Total payments will not exceed **$17,500.**

Strategic Site Assemblage Tax Credit

We believe that reinstituting the retired Impact Fee Deferral program as the Strategic Site Assemblages Impact Fee Tax Credit is warranted. We see the use of a site assemblage credit as particularly valuable in Cape Coral as small, platted properties continue to encourage sprawl in favor a denser urban fabric. Among the most important objective of the incentives is the promotion of affordable housing solutions. The program will defer impact fees for road and utility capital expenses on sites that assemble at least three pre-platted housing lots for development of affordable housing.

For commercial properties, we can envision that an assemblage of at least two commercial lots or an assemblage of a 50% increased lot area accomplished by a mix of commercial or residential lots (rezoned) would trigger the incentive. A requirement for this incentive application in business use would be the application toward at least one of the target industry clusters.

5.b – Economic Impact Analysis

The Economic Impact Analysis EIA utilizes industry standard input-output modeling software (IMPLAN[5]) and a Net Present Value (NPV) calculation. The IMPLAN model is a Lee County-based system, distilled down to 5-digit zip code tabulation areas (ZCTA's) level of analysis, and then combined into overall economic impact for the City of Cape Coral.

Key Terminology

Direct Effects – the set of expenditures applied to the predictive model (i.e., I/O multipliers) for impact analysis. It is a series (or single) of production changes or expenditures made by producers/consumers as a result of an activity or policy. These initial changes are determined by an analyst to be a result of this activity or policy.

Indirect Effects – the impact of local industries buying goods and services from other local industries. The cycle of spending works its way backward through the supply chain until all money leaks from the local economy, either through imports or by payments to value added.

Induced Effects – The response by an economy to an initial change (direct effect) that occurs through re-spending of income received by a component of value added. This money is recirculated through the household spending patterns causing further local economic activity.

Labor Income – all forms of employment income, including Employee Compensation (wages and benefits) and Proprietor Income.

Value Added – the difference between an industry's or an establishment's total output and the cost of its intermediate inputs. It equals gross output (sales or receipts and other operating income, plus inventory change) minus intermediate inputs (consumption of goods and services purchased from other industries or imported). Value added consists of compensation of employees, taxes on production and imports less subsidies and gross operating surplus.

Output – represents the value of industry production. In IMPLAN these are annual production estimates for the year of the data set and are in producer prices. For manufacturers this would be sales plus/minus change in inventory. For service sectors production = sales. For Retail and wholesale trade, output = gross margin and not gross sales.

[5] IMPLAN (*IMpacts for PLANning*; Version 3.1.1001.12, Minnesota Implan Group, Inc. 2013)

Net Present Value -- is a measurement of the profitability of an undertaking that is calculated by subtracting the present values (PV) of cash outflows (including initial cost) from the present values of cash inflows over a period of time. Incoming and outgoing cash flows can also be described as benefit and cost cash flows, respectively.

The EIA allows us to forecast direct, indirect, and induced impacts from labor and investment in projects, including numbers of jobs created and tax revenue. For any incentive proposed or evaluated, the Net present Value allows us to determine its viability for the City. Working with the City, we will establish benchmark guidelines of acceptable economic impacts/ incentives costs ratios.

Evaluation of Incentives

An Office Development Scenario

As a study example, a new corporate employer has decided to establish operations in Cape Coral. The Board of Directors feels that is in the company's best interest to purchase land and erect a new facility rather than rent. The program is for a **250-seat** call center which coincidentally meets the requirement of a Cape Coral target industry. To accommodate the use, a 6.9-acre site assembly in the Pine Island Road area has been chosen.

Total development and construction are scheduled for two years, with 60% of construction work employment occurring in the first year, and 40% in the second. Office occupancy will begin in the third Project year (Occupancy year 1) at 50% occupancy, increasing to 75%, 90%, and finally 100% in the 2nd, 3rd, and 4th year of occupancy, respectively. Property taxes in the first year will cost $**35,700** which will inflate to **$202,048** by the completion of construction.

The development program is for a maximum buildout of **57,500 sf** of professional office space in low-rise building with on-site parking for **288** cars. The Floor-Area-Ratio is calculated at **.18** FAR. Building construction is projected to create **97** new construction jobs over a two-year period. Office operations are projected to create **125** jobs in the first year of operation (yr. 3) and then fill to the 250-seat capacity by the fourth operational year (yr. 6). Construction will also contribute the creation of **3** other support jobs and the office occupancy will generate **6 s**upport positions.

Staffing for the new project would is shown below. From the table, 35 positions would qualify for the 110% wage bonus and 10 would meet the 120% threshold.

Position	Staff	Hrly Wage $	Percent of Local Wage	>110%	>125%
General and Operations Managers	10	$51.54	203%		Y
Training and Development Specialists	4	$30.52	120%	Y	
Business Operations Specialists, All Other	4	$31.00	122%	Y	
Computer User Support Specialists	5	$27.26	107%		
Counter and Rental Clerks	6	$16.44	65%		
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	11	$29.47	116%	Y	
Telemarketers	29	$16.95	67%		
First-Line Supervisors of Office and Administrative Support Workers	17	$30.29	119%	Y	
Bill and Account Collectors	24	$20.16	79%		
Customer Service Representatives	126	$18.46	73%		
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	3	$18.53	73%		
Mail Clerks and Mail Machine Operators, Except Postal Service	5	$16.71	66%		
Office Clerks, General	6	$19.43	76%		
Total	**250**				
Mean Cape Coral-Fort Myers Avg. Annual Hrly. Wage		**$25.45**			

Economic Impacts

Exhibit 5.a (below) illustrates the components of the EIA. The 6.9-acre parcel is valued at **$2.2 million** and the building construction cost is estimated at **$10.4 million**.

Construction Period

In the first two years of construction, Labor Income will total **$5.4 million**, Value-Added will total **$5.700 million**, and Total Economic Impact (Output) will total **$10.8 million**.

Office Occupancy

By the operational year 4 (Project year 6) of the call center, Labor Income will be **$9.4 million**, Value-Added will be **$8.4 million**, and Total Economic Impact (Output) will generate **$17.7 million** each year afterward.

Exhibit 5.a – Office Development Scenario				
Total Assemblage GIS Acres		Total Assemblage 2016 Taxes	Total Assemblage Just Appraisal (Market Value)	
6.9		$35,000	$2,218,000	
Lot SF	Ratio of Parking Space/1,000 SF	Land Area per Parking Space (SF)	Assumed Open Space	Number of Stories
302,600	5	350	40%	2
Building Total SF	# of Parking Spaces	Total Parking Area SF	Footprint SF	FAR
57,500	288	100,600	28,750	0.18
Economic Impact - Office Construction - Project Yr. 2				
Total Construction costs (not including land)				**$10,432,963**
Impact Type	Employment (local)	Labor Income	Value Added	Output
Direct Effect	97	$5,347,507	$5,496,166	$10,432,963
Indirect Effect	2	$59,937	$100,398	$211,449
Induced Effect	2	$37,015	$100,988	$152,324
Total Effect	**100**	**$5,444,459**	**$5,697,552**	**$10,796,736**
Economic Impact - Office Occupancy - Project Yr 6; Operations Yr 4				
Office Jobs				**250**
Impact Type	Employment (local)	Labor Income	Value Added	Output
Direct Effect	250	$9,136,534	$7,894,247	$16,787,712
Indirect Effect	5	$233,994	$332,234	$660,336
Induced Effect	1	$64,136	$172,937	$263,030
Total Effect	**256**	**$9,434,664**	**$8,399,418**	**$17,711,078**

Ad Valorem Tax Incentive

Since this is an Office project with employment over 75 jobs, the Ad Valorem Tax Incentive of 50% reduction for 10 years will apply. Property taxes are estimated at the current milage rate of **$15.7911** assumed to gain by an annual rate of **2.1%** for inflation[6]. In total, the incentive is valued at **$906,107**, as shown in the table below:

[6] Projected Annual Inflation Rate in the United States from 2010-2028; Statista; https://www.statista.com/statistics/244983/projected-inflation-rate-in-the-united-states/

Project Time	Property Tax - Land	Property Tax - Imprvmnts	Property Tax Total	Incentive Increment	Net Property Taxes Paid	Value of Ad Valorem Tax Credit Incentive
Year 1 - Office Constr. Year 1	$35,700	$0	$35,700	0%	$35,700	$0
Year 2 - Office Constr. Year 2	$36,500	$0	$36,500	0%	$36,500	$0
Year 3 - Office Occup. Year 1	$37,300	$164,748	$202,048	50%	$119,674	$82,374
Year 4 - Office Occup. Year 2	$38,000	$168,208	$206,208	50%	$122,104	$84,104
Year 5 - Office Occup. Year 3	$38,800	$171,740	$210,540	50%	$124,670	$85,870
Year 6 - Office Occup. Year 4	$39,600	$175,347	$214,947	50%	$127,273	$87,673
Year 7 - Office Occup. Year 5	$40,500	$179,029	$219,529	50%	$130,014	$89,514
Year 8 - Office Occup. Year 6	$41,300	$182,788	$224,088	50%	$132,694	$91,394
Year 9 - Office Occup. Year 7	$42,200	$186,627	$228,827	50%	$135,514	$93,314
Year 10 - Office Occup. Year 8	$43,100	$190,546	$233,646	50%	$138,373	$95,273
Year 11 - Office Occup. Year 9	$44,000	$194,548	$238,548	50%	$141,274	$97,274
Year 12 - Office Occup. Year 10	$44,900	$198,633	$243,533	50%	$144,217	$99,317
Totals	**$481,900**	**$1,812,213**	**$2,294,113**		**$1,388,007**	**$906,107**

Target Industry Job Creation Grant

Falling within the Business & Financial Services cluster, the Target Industry Job Creation_Grant program would be applicable. Incentives for new job creation are paid over 3-year periods matching incremental jobs growth. New jobs are paid at **$2,500** per position; **35** bonus jobs (110% level) are paid at **$1,000** each; **10** bonus jobs (120%+ level) are paid at **$2,000** each. Total cost for the Target Industry Job Creation Grant IS **$700,000**, as shown in the table below:

Project Time	Constr. Jobs	Office Jobs	New Jobs Grant	110% Bonus Grant	120% Bonus Grant	Value of Total Jobs Grant
Year 1 - Office Constr. Year 1	58	0	$0	$0	$0	$0
Year 2 - Office Constr. Year 2	39	0	$0	$0	$0	$0
Year 3 - Office Occup. Year 1	0	125	$104,167	$6,000	$13,333	$123,500
Year 4 - Office Occup. Year 2	0	188	$156,250	$8,667	$8,667	$173,583
Year 5 - Office Occup. Year 3	0	225	$187,500	$10,333	$10,000	$207,833
Year 6 - Office Occup. Year 4	0	250	$104,167	$5,667	$5,333	$115,167
Year 7 - Office Occup. Year 5	0	250	$52,083	$3,000	$2,000	$57,083

Year 8 - Office Occup. Year 6	0	250	$20,833	$1,333	$667	$22,833
Year 9 - Office Occup. Year 7	0	250	$0	$0	$0	$0
Year 10 - Office Occup. Year 8	0	250	$0	$0	$0	$0
Year 11 - Office Occup. Year 9	0	250	$0	$0	$0	$0
Year 12 - Office Occup. Year 10	0	250	$0	$0	$0	$0
Totals	**97**	**250**	**$625,000**	**$35,000**	**$40,000**	**$700,000**

Total Impacts and Net Present Values

The Total Economic Impact after two years of construction and ten years of call center operation is calculated at **$173.4 million**, or a NPV of **$118.3 million** today. The Total Economic Impact Ratio (total economic impacts/ total incentive cost) is a healthy **102.9**, resulting in an outstanding value for Cape Coral, in that for every **$1.00** offered in incentives, a return to the Cape Coral in economic activity generates **$102.90** in economic benefit.

Project Time	Total Economic Impacts	Value of Ad Valorem Tax Credit Incentive	Total Jobs Grant Incentive	Total All Incentives
Year 1 - Office Construction Year 1	$6,476,809	$0	$0	$0
Year 2 - Office Construction Year 2	$4,319,927	$0	$0	$0
Year 3 - Office Occupancy Year 1	$9,042,388	$82,374	$123,500	$205,874
Year 4 - Office Occupancy Year 2	$15,301,145	$84,104	$173,583	$257,687
Year 5 - Office Occupancy Year 3	$16,051,070	$85,870	$207,833	$293,703
Year 6 - Office Occupancy Year 4	$17,711,078	$87,673	$115,167	$202,840
Year 7 - Office Occupancy Year 5	$17,588,759	$89,514	$57,083	$146,598
Year 8 - Office Occupancy Year 6	$17,467,574	$91,394	$22,833	$114,228
Year 9 - Office Occupancy Year 7	$17,425,563	$93,314	$0	$93,314
Year 10 - Office Occupancy Year 8	$17,383,658	$95,273	$0	$95,273
Year 11 - Office Occupancy Year 9	$17,341,858	$97,274	$0	$97,274
Year 12 - Office Occupancy Year 10	$17,300,164	$99,317	$0	$99,317
Totals	**$173,409,994**			
Ad Valorem Tax Incentive		**$906,107**		
Jobs Grant Incentive			**$700,000**	
Total Incentives				**$1,606,107**
NPV (5.5% discount)	**$118,333,697**			**$1,149,999**
Economic Impact Ratio (total impacts/total cost)				**102.9**

Conclusions

The formation of new incentive programs should be considered and employed judiciously where their overall performance is positive. We would urge the OEBD to utilize the Economic Impact Analysis methodology on all future project recommendations. The EIA outcomes can serve as backstops against the risk of over incentivizing private or even municipal investments or capital expenditures. While each analysis is distinct and without direct application to another project, we would recommend that the City maintain at least **10.0** target ratio its deliberations. This would result in a **$10** return in total economic impact to every **$1** of incentive offering.

Arising from the Target Industry analysis, we are keenly aware of Cape Coral's weaknesses in key sectors such as Professional & Business Services, Transportation & Warehousing, and Education & Healthcare. These are vital drivers for economic growth in any market, as they instill major capital expenditures. Cape Coral currently has limited Class A office space, distribution-size warehouses, or medical /higher education institutional investments. To attract the attention of national leaders in these industries who can appreciate the value of a growing and yet untapped labor market, there will need to be commitments made, or at least provisions for, appropriate facility development to house these new employers. It is the role of strategically created incentives to serve both the real estate developer as well as the end user to make Cape Coral a more dynamic urban destination.

5.c – Task 5 Progress Report/video conference

We conducted a video conference with the Project Review Committee on April 20, 2024. Work product to date was discussed and the materials covered were previously uploaded to the website.

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Economic Development Strategic Plan - RCM2342AS

Task 6 Report

prepared for:

City of Cape Coral Office of Economic and Business Development.
Cape Coral City Hall
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May 30, 2024

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Task 6: Existing Business Development

6.a – Business Retention Roundtables

For some economic development organizations, Business Retention and Expansion (BR&E) is the central role they play. Some years ago, DCG Corplan was retained to identify a new location for a medical services firm that was leaving Cape Coral. The company felt that entry workers were not adequately prepared for work and more seasoned workers had a poor work attitude. The company also noted the lack of higher educational or on-the-job training opportunities.

It is important that the OEBD recognize that many businesses simply may be unaware of BR&E incentives or programs available. This is a common problem in communities across the US.

We scheduled two business meeting "roundtables" in different parts of the City oriented at bringing more awareness of available governmental assistance to the business community. While segmenting the meetings geographically might have made travel more convenient for local employers, we determined that dividing the business community into "Goods-Producing" and "Services-Producing" sectors would produce better results for the work. The meetings were scheduled for April 2 and April 3 to be held at the two Cape Coral libraries. The meetings were headed by John Dolan-Heitlinger of D-H & Associates Consulting, following the format described below. Summaries of the Target Industries Clusters were produced as handouts for each meeting. Refer to the Task 6 Appendices for further information.

Through coordination with the City, we obtained email addresses for **54** Goods-producing businesses, and **71** Services-producers. Realizing that this was too small a small an audience, we engaged a commercial service to (RocketReach) to provide us with about **2,500** additional contacts. We combined both lists and sent email invitations to the meetings to **1,007** Goods-producers and **1,290** Services-producers.

Agenda Introduction (5 minutes)

Facilitator Welcome: Welcome, everyone, and thank you for joining today's focus group. Our objective is to gather insights from you, the business leaders of Cape Coral, to identify key development priorities for our city. Your expertise and perspectives are invaluable to shaping a prosperous future for Cape Coral.

Each table or group should select a chair to follow the agenda and encourage participation from each individual member.

Warm-Up Questions (10 minutes)

Background and Involvement: Could you briefly describe your business and your role within it? How long have you been operating in Cape Coral?

Initial Thoughts on Cape Coral's Development: In a few words, how would you describe the current State of development in Cape Coral? What do you see as the most positive aspect of our city's development so far?

Development Priorities (20 minutes)

Key Areas for Development: In your opinion, what are the critical areas for development in Cape Coral (e.g., infrastructure, technology, education, healthcare, tourism, and recreation)? Please explain why.

Challenges and Opportunities: What challenges do you think are hindering development in these areas? Conversely, what opportunities do you see for growth and improvement?

What are the economic factors such as the availability of labor and talent, workforce housing, office or industrial parks, commercial developments

Comparison with Other Cities: Are there any examples from other cities, either within Florida or outside, that you think Cape Coral could learn from in terms of development? What specifically about these examples stands out to you?

Business Environment and Support (20 minutes)

Business Environment: How would you rate the current business environment in Cape Coral? What changes would make it more conducive to growth and innovation?

Support and Resources: What types of support, resources, or policies do you believe would help businesses thrive in Cape Coral? How do you see the city's role in providing this support?

How does the local and State government help or hinder the development of your business and other businesses that might support your business?

Future Vision and Action (15 minutes)

Vision for Cape Coral: Looking ahead, what is your vision for the future of Cape Coral in the next 5 to 10 years? What key achievements would you like to see?

Prioritization of Actions: Based on our discussion, what are the top three development priorities you believe should be addressed first? Why?

Personal Contribution: What role do you see yourself and your business playing in achieving these development priorities? How can you contribute to Cape Coral's future growth?

Conclusion and Next Steps (5 minutes)

Thank you and Wrap-Up: Thank you for your insightful contributions. Your feedback is crucial for shaping Cape Coral's comprehensive development strategy. We will compile the insights from today's discussion into a report that will be part of the final report to the City of Cape Coral.

During the discussion, the consulting team members should walk from group to group listening and, as appropriate, ask questions to stimulate discussion among focus group participants. Focus group participants should be encouraged to share their thoughts and opinions openly.

Meeting #1: Tuesday, April 2 – Northwest Regional Library

519 Chiquita Blvd N
Rm A (NW)
6:00PM – 7:15PM

Goods-Producing Industries:

- Construction
- Manufacturing
- Repair & Maintenance
- Real estate
- Warehousing & Storage
- Transportation

Summary

These summaries compile insights from two focus group sessions, each lasting 90 minutes, with business members from Cape Coral, facilitated by the DCG Consulting Group. The discussions engaged 8-10 speakers per table, exploring several key themes related to the community's economic development and infrastructural needs.

Commercial Real Estate and Development Challenges

Vacancy and Development Needs: Discussions highlighted the near-zero vacancy rates impeding new businesses from entering the market. Participants emphasized the urgent need for additional commercial and industrial spaces to accommodate demand and support local business growth.

Infrastructure and Permitting Delays: Multiple speakers pointed out the slow permitting process, which adversely affects development timelines. There is a strong consensus on the need for the city to streamline these processes to allow faster development and occupancy.

Economic Growth and Investment Opportunities

Community and Market Potential: Participants discussed Cape Coral's potential for economic growth, focusing on smart growth strategies that include incentives for developers and businesses. The city's large size and growing population are seen as major assets.

Business Support and Infrastructure: There was a call for enhanced support for businesses, especially small enterprises, including better infrastructure and training programs to foster local economic growth.

Workforce Development and Training

Remote Work and Workforce Mobilization: The impact of COVID-19 on work habits, particularly the rise of remote work, was a significant topic. Discussions explored how the city could capitalize on this trend by attracting businesses that offer remote work opportunities.

Training Programs: The need for local training programs, particularly those offering micro-credentials, was emphasized to quickly upskill the workforce to meet local industry demands.

Manufacturing and Industrial Development

Sector Needs: There was a focus on the necessity for a manufacturing extension program and the creation of industrial parks to support manufacturing and industrial sectors. Emphasis was placed on clean tech industries and environmentally friendly industrial development.

Community Planning and Participation

Engagement and Feedback: The importance of community input through surveys and feedback in shaping business development strategies was highlighted, stressing collaborative planning processes.

Government and Taxation

Tax Policies and Incentives: Taxation discussions centered on its impact on business operations, with an emphasis on the potential for tax incentives to attract and retain businesses and the bureaucratic challenges, particularly concerning property taxes.

Cultural and Social Factors

Cultural Impact on Business: The cultural environment of the business community and its impact on business operations and employee satisfaction and retention were explored.

Urban Development and Demographic Changes

Changing Demographics and Urban Planning: Discussions included the need for urban development that accommodates a younger, increasing population, addressing homelessness, and enhancing city planning to improve the quality of life.

Political Influence and Community Engagement

Political and Community Impact: The potential political influence of mobilizing Cape Coral's population was discussed, along with the critical role of community engagement in ensuring development aligns with residents' needs.

Meeting # 2" Wednesday, April 3 – Cape Coral Public Library

921 SW 39th Terrace
Meeting Room (CC)
6:00PM – 7:15PM

Services-Producing Industries:

- Professional/business/finance
- Retail
- Education
- Healthcare
- Food Services
- Hospitality
- Arts/Entertainment/Amusement

Summary

These summaries compile insights from two focus group sessions, each lasting 90 minutes, with business members from Cape Coral, facilitated by the DCG Consulting Group. The discussions engaged 8-10 speakers per table, exploring several key themes related to the community's economic development and infrastructural needs.

Urban and Community Planning

The focus groups highlighted the necessity of strategic urban planning to address rapid population growth in Cape Coral. Discussions emphasized creating cohesive community networks rather than solely expanding the urban center. The pre-planned city layout by the Rosen brothers was noted as both a beneficial legacy and a present-day challenge. There was a consensus on the importance of integrating community services and maintaining economic vitality through balanced development of housing and business sectors.

Transportation and Infrastructure

Participants discussed significant challenges in expanding road infrastructure and managing traffic congestion. Proposals included the feasibility of adding more lanes, building flyovers, and introducing one-way traffic systems to enhance flow. The need for a comprehensive master transportation plan was evident, focusing on road expansions and speed limit adjustments.

Housing and Real Estate

Affordable housing emerged as a critical concern, with discussions centered on the need to support a diverse economic demographic amidst rising property values and gentrification. The group talked about the impact of these trends on community character and the necessity for workforce housing to accommodate the city’s growth.

Economic Development and Business Growth

There was a strong focus on nurturing local businesses, leveraging them for economic growth, and using incentives to retain and expand these enterprises. The challenges of attracting large businesses and technology campuses, due to the city's distance from major highways, were also discussed.

Environmental Concerns and Recreational Planning

Environmental issues were a significant concern, particularly the maintenance of water quality and the potential use of canals for tourism. The groups discussed the need for substantial park spaces and a regional destination park, suggesting that clean waterways are vital for community health and tourist appeal.

Community Services and Amenities

The need for more local services and amenities to enhance residents' quality of life was emphasized. This includes more community-centered spaces like parks and recreational areas, as well as the necessity of improved public services.

Educational Facilities and Opportunities

The desire for more educational institutions, such as colleges or specialized campuses, was highlighted to support economic growth by providing local training and skill development.

Tourism and Marketing

The role of tourism was acknowledged, with discussions on leveraging natural resources to boost tourism, including implementing water taxi services and enhancing marketing strategies to attract visitors.

Political Influence and Community Engagement

The discussions underscored the potential political influence of Cape Coral's growing population and the importance of community involvement in planning and development to ensure growth aligns with residents' needs.

6.b – Employer Survey

Obtaining business input is vital for economic development plans, so an Employer Survey was designed to engage Cape Coral businesses. SurveyMonkey.com was retained to host the online survey, with a series of brief questions devised. Ten questions were posed; nine were multiple-choice, the tenth was an essay-type.

Email invitations were sent to over **6,800** addresses plus the City provided social media support. The survey was opened on April 15, 2024 and closed on May 3, 2024. Altogether, **162** responses were generated, or about a **2.4%** return rate. A summary of the questions and answers are as follows (for detailed information on the Public Survey, refer to the Task 6 Report Appendices):

Q1: How long has your business been operating in Cape Coral?
Leading response: **Ten Years**

Q2: What is the primary industry of your business?
Leading responses: **Other Services, Professional/business, Construction**

Q3: How many employees do you currently have?
Leading response: **1 to 10**

Q4: Are the majority of job applicants ready for work, or do they require training?
Leading response: **Minor job training needed**

Q5: What are the most sought after job aspects new applicants have when seeking employment? (Please select up to three)
Leading responses: **Steady job/employment security, Earn a lot of money, Good benefits**

Q6: Would you be interested in government-sponsored training programs to enhance the skills of your workforce?
Leading response: **No (But combined *Yes* and *Maybe* was a larger total)**

Q7: What are the top three challenges your business is currently facing? (Please select up to three)
Leading responses: **Hiring skilled employees, High operational costs, Marketing and customer acquisition**

Q8: Which of the following government incentives would be most beneficial for your business? (Please select up to three)
Leading responses: **Tax breaks or credits, Reduced bureaucracy and faster permit processes, Grants for small businesses**

Q9: How valuable would partnerships between your business and local educational institutions (e.g., colleges, trade schools) be for your workforce development needs?
Leading response: **Somewhat valuable**

Q10: What specific government actions or policies would assist your business in achieving greater success?
94 written comments were received and the major themes were as follows:

- Affordable workforce housing
- Better waterway access
- Code enforcement
- Easier access to capital
- Government contracting opportunities
- Government transparency
- Incentivizing flex warehouse development
- Incentivizing manufacturing
- Low interest loans for start-ups
- Lower business taxes
- Partnerships with city processes
- Permit expediting
- Property and flood insurance premium assistance
- Reduction of licensing fees
- Regulatory reduction
- Small business development grants
- Street beautification
- Supply chain improvements
- Upgraded infrastructure
- Vocational training silos for the trades

6.c – BR&E Online Webinar -- CANCELLED

The On-Line Webinar is cancelled due to lack of attendance at the business roundtables. Project fee balance for this task will be transferred to Reimbursable Expenses.

6.d – Task 6 Progress Report/video conference

We conducted a video conference with the Project Review Committee on May 15, 2024. Work product to date was discussed and the materials covered were previously uploaded to the website.

Economic Development Strategic Plan - RCM2342AS

Task 7 Report

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June 20, 2024

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Task 7: Tourism and Marketing Analysis

7.a – Tourism Baseline

Stakeholder Engagement

Tourism Research Sources

- August RSW Air Service Update[1]
- Lee CVB Performance Indicators November 2022[2]
- Cape Coral Hotel Inventory - 2022-2023[3]

Interviews with key stakeholders with perspective and knowledge on the Cape Coral tourism industry were a crucial part of the research process. Alan Parter conducted a total of 12 interviews from a group of 16 key stakeholders. The interviewees were chosen through a collaborative discussion between the Cape Coral City Managers staff and the consulting team. The following individuals were interviewed as part of the stakeholder engagement process:

1. Jeremy Vincent – Jungle Bird and Front Porch Social
2. Katie Locklin – Parks & Recreation, Program Supervisor
3. JoAnn Elardo – Wicked Dolphin Rum Distillery
4. Jeff Mielke - Lee County Sports Development
5. Steve Geiger – General Manager Safe Harbor Marina
6. Gary Aubachon – Local Developer building Slipaway, a Food Truck/ Marina destination
7. Michael Ilcyzyszn – Cape Coral City Manager
8. Sharon Woodberry, Matt Grambow, Adrenna Peterson, Ashley Anderson– Cape Coral City Manager's Office
9. Donna Germain – President, Cape Coral Chamber of Commerce
10. Bill Steinke – City Council Member & TDC Board (Ex-Officio)
11. Barry Kadel – General Manager Westin Hotel
12. Tamara Pigott & Pamela Johnson – President & Vice President, Ft. Myers Visitors Bureau

[1] Southwest Florida International Airport
[2] Lee County Convention and Visitors Bureau
[3] Lee County Convention and Visitors Bureau

A discussion guide was utilized for each of the interviews to provide a common basis for the conversation, though each interviewee was encouraged to expound on their areas of interest and expertise. Discussion topics included:

- Perspectives on the current Cape Coral visitor experience
- Opinions and ideas regarding: individual attractions and events
- The tourism infrastructure
- Tourism marketing
- Potential partnerships
- Potential community tourism champions / cheerleaders
- Suggestions on how to address perceived gaps

Specific stakeholder comments are kept confidential to enable open feedback to be provided. Themes and findings from the stakeholder interviews are a key basis for the SWOT analysis presented in this report.

Tourist Related Sites Visited

The goal of site visits is to observe firsthand the visitor experience at the ground level, to connect with attraction operators where possible, and to understand the feel of the supporting infrastructure (wayfinding, food, lodging, etc.) that visitors experience in the City and Lee County.

1. Cape Coral Yacht Club
2. Wicked Dolphin Rum Distillery
3. Tito's Cantina
4. Westin Hotel
5. Tarpon Point Marina
6. 47th Terrace, Restaurant Row
7. Sun Splash Water Park
8. Gator Mike's Family Fun Park
9. Lake Kennedy Racquet Facility (Pickleball & Tennis Courts)
10. Skate Park
11. Bowling Alley
12. Dance Theater and Aerial Arts
13. Tropical Breeze Fun Park
14. Rotary Park Environmental Center
15. Four Mile Cove Ecological Preserve
16. Edison & Ford Estates, Museum, and Gardens
17. River Development/First Ave in Ft Myers

7.b – Tourism Analysis

Introduction

Although Cape Coral is not currently considered or recognized as a destination city, it is well positioned to improve its quality, status, and reputation as a tourist destination. While it is not a traditional South Florida tourism hotspot, since it has only one small beach, no traditional downtown, and a limited number of hotel rooms, it does possess ingredients that with further development can make it a competitive locale. In addition, it can increase use/occupancy of its vacation rentals and hotel rooms by better partnering with its neighboring Lee County destinations, to take advantage of their tourism assets, thereby expanding upon Cape Coral's own tourism product.

Cape Coral needs to invest resources, both manpower and funding, to enhance its attractions and events that are currently drivers of visitor activity; develop new attractions; and to promote the city's relaxed atmosphere, its connection to water, the availability to be active and involved with sports, its food scene, its family friendly activities, and the many opportunities to commune with nature.

The Planning Process

The strategic planning process was implemented in a sequence of three phases:

1) Research and Assessment: Gathering information relevant to assess Cape Coral's tourism environment.

2) Situation Analysis: Synthesis of research findings into a Strengths / Opportunities / Weaknesses / Threats (SWOT) framework.

3) Strategic Recommendations: Development and documentation of recommendations and action steps that are prioritized within the Economic Development Strategic Plan.

Recent Travel Trends that Relate to Cape Coral

The Covid 19 pandemic and then Hurricane Ian caused an unprecedented disruption to the normal flow of visitor activity in Lee County. As the direct effects of these events have begun to recede, the travel industry in general and Lee County in particular remain heavily influenced by changes in consumer expectations, behaviors, and habits that have emerged in the last few years. Several of the key travel trends relate directly to Cape Coral.

Ecotourism

Ecotourism is a term that covers a range of travel experiences in which visitors interact with and are conscious of the natural environment around them. For many travelers, broader consciousness around environmental and climate change issues has changed expectations for their travel experiences. This dynamic was supplemented during the pandemic by a greater emphasis on outdoor activities and natural spaces, as a reaction to concerns about safety conditions. Going forward, these patterns are likely to play out in different ways in different destinations. Some may offer travel opportunities related to sustainability, climate, or environmental preservation issues, while others may benefit from a greater emphasis on outdoor and immersive natural activities.

Increased Private Rentals

Platforms such as Airbnb, VRBO, Booking.com, and others have disrupted how people select a place for vacation. Private homes, condos, apartments, and rental of rooms, an area where Cape Coral is especially strong, have allowed individuals or small businesses to rent out their places, competing directly with hotels and resorts. While these platforms had been gaining market share pre-COVID, additional travelers used them for the first time during this period, as they sought to book a more "isolated" experience due to health concerns. This increased reach means that private rentals will be in the consideration set for a broader segment of travelers as they consider their trip options going forward.

Experiential Tourism

Over the course of several years (pre-dating the pandemic), consumers have increasingly seen travel as a way of understanding and appreciating alternative ways of life, learning new things about cultural and natural landscapes, and even as a means of self-discovery. This is often referred to as "authentic" or "experiential travel," and it is gaining ground as a preferred way of exploring new places. These travelers seek to connect to a destination on an emotional level, and not experience the place as a mere backdrop for activities that could easily be experienced anywhere else. This trend goes hand to hand with the rise of the sharing economy (which can allow visitors to experience a destination "like a local") as well as the greater availability of information on "hidden" experiences online and on social media, which allow visitors to learn about more activities beyond the "must-see" headliners. Numerous sharing-based travel web platforms and apps have been developed that are geared toward tourists who seek to engage with locals and to understand destinations on a deeper level than seeing the traditional "tourist spots". For Cape Coral, boating, either with a local or bare boating is an example of experiential tourism. The long-term trends in technology and social shifts driving this type of tourism are expected to expand this trend.

Hybrid Trips (Work from Anywhere):

The pandemic triggered an immediate jump in remote work activity. It appears that many office workers will remain in a remote or "hybrid" work arrangement that differs from the pre-COVID norm. For many workers, greater locational flexibility comes with the expectation that they are "available" for work even when not situated in the office. This changing dynamic has implications for travel, and even how workers conceive of when they are on "vacation." Just as "hybrid workers" are sometimes in the office and sometimes remote, there is an emerging category of "hybrid trips" in which travelers are participating in leisure activities but remaining engaged with work activities. This greater flexibility opens the possibility of new destinations or experiences than those that travelers have traditionally sought within the pure "leisure" or "business" trip categories.

Shorter Stays (Micro-cations)

Throughout the course of the COVID-19 pandemic, populations around the world experienced prolonged periods of isolation from family, friends, and the outside world, resulting in a pent-up desire to reconnect and experience "normal" activities. While many expressed a desire to take an initial "big vacation" when conditions allowed, long term trends dating back to before the pandemic point towards shorter vacations as the norm. This trend is associated with the Millennial generation, which has less of a tendency to "unplug" for extended vacations. Shortened length of stays would tend to advantage domestic travel over international, and advantage more accessible destinations (Cape Coral is easily accessible both by air and automobile) over more challenging ones to get to. Micro-cations also pose a financial benefit for travelers, since shorter stays often result in cheaper price tags, which in turn increases tourists' willingness to travel.

Multigenerational

There are several factors that collectively contribute to the rising popularity of multigenerational tourism, making it a preferred choice for many families looking to maximize their vacation experiences. Some of the evolving, economic, and technological factors are: improved health and longevity; increased disposable income for many older adults; changing family dynamics with many modern families often living further apart; work flexibility making it easier for parents to combine work and vacation time; families recognize travel's educational value and it allows grandparents to share knowledge with younger generations; with a concern for safety and security families are more comfortable traveling together; fits well within a broader trend in tourism towards niche and personalized travel experiences. Cape Coral with an older population (although the demographics are changing) and activities that are of interest to families, can benefit from this trend.

The Importance of Tourism to Cape Coral's Overall Economic Development Strategy

Improved tourism will have significant economic, social, and environmental impacts on the city. Some of the examples are:

ECONOMIC BENEFITS

Revenue Generation: Tourism generates substantial revenue through the spending of tourists on accommodation, food, transportation, entertainment, and shopping.

Job Creation: The tourism industry creates direct employment opportunities in hotels, restaurants, travel agencies, and attractions, as well as indirect jobs in related sectors such as construction, retail, and transportation. This can be especially true of Cape Coral, which is dominated by small businesses. Travel-dependent leisure and hospitality is the largest small business employer in the US, and it can have a significant impact on Cape Coral.

Business & Residential Growth: A stronger reputation as a tourist destination will positively affect Cape Coral's perception as a business destination since today's tourist often becomes tomorrow's business owner or homeowner. Several of the individuals interviewed for this assignment were first introduced to Cape Coral as visitors.

Infrastructure Development: The demand for tourism often leads to improved infrastructure, such as airports, parks, roads, and public transportation, benefiting both tourists and residents.

SOCIAL AND CULTURAL BENEFITS

Quality of Life: Enhanced amenities and services developed for tourists, such as parks, restaurants, and recreational facilities, can also improve the quality of life for residents.

Preservation of Heritage: The interest of tourists in historical, cultural, and environmental sites often leads to their preservation, restoration, and expansion.

Community Development: Tourism can stimulate the development of local communities, providing funds for public services, healthcare, and education.

Cultural Exchange: Tourism fosters cultural exchange and understanding between people from different backgrounds.

ENVIRONMENTAL BENEFITS

Conservation Efforts: Revenue from tourism can be directed toward the conservation of natural landscapes, wildlife, and marine environments.

Awareness and Education: Tourism can raise awareness about environmental issues and the importance of preserving natural resources and ecosystems.

Cape Coral is situated to unlock its improved tourism driven economic potential. This is the opportune time for the city to take full advantage of its location, available land, resources, and human capital to advance the economic vitality of the city. To achieve this, it will need to move forward on several fronts:

1. **Product Development** – Build upon the city assets to enhance existing tourism products and attract new ones.
2. **Tourism Infrastructure** – Invest in smart infrastructure resources to support tourism related growth.
3. **Collaboration** – Strengthen collaboration with private sector, public/private sector organizations, and other governments to advance tourism.
4. **Strong Implementation** – Put plans into action, monitor progress, and adjust as needed.
5. **Economic Vitality** – Attract more businesses that continue to contribute to the quality of life.

The recommendations laid out in this report are designed to help guide the priorities and activities to be considered over the next few years. Within this framework, strategic decisions will need to be made to implement the plan, take advantage of funding opportunities, and respond to changing conditions as they emerge. All recommendations are action oriented to achieve the goals of increasing tourism activity and improving the economic vitality of the city.

7.c – SWOT Analysis

Swot Analysis Definitions

Strengths

- Attributes of Cape Coral that are helpful in achieving a successful tourism initiative.
  - What does Cape Coral do better than others?
  - What do others see as Cape Coral's strengths?
  - What unique resources can Cape Coral draw upon?

Weaknesses / Challenges

- Attributes of Cape Coral that are harmful to achieving a successful tourism initiative.
  - Where does Cape Coral have fewer resources than others?
  - What others are likely to see as Cape Coral's weaknesses?
  - What places Cape Coral at a disadvantage?

Opportunities

- Factors that could be helpful to Cape Coral in achieving a successful tourism initiative.
  - What elements could Cape Coral exploit to its advantage?
  - What activities and trends can Cape Coral take advantage of?

Threats

- Factors that could be harmful in achieving a successful tourism initiative.
  - What activities and trends have the potential to cause trouble to Cape Coral?

SWOT Analysis

Key findings from the secondary research, interviews, and site visits conducted in the Assessment phase have been assembled by the consulting team into a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis. This framework considers both positive and negative aspects of the regional tourism industry, and also considers which aspects are internal to Cape Coral and which are impacted by external forces. Elements of the SWOT analysis are divided into three categories to provide a foundation for the categories of strategic recommendations that follow. These categories are:

- ***Tourism Attractions / Infrastructure /* Visitor Experience:** represents the attractions, activities, and infrastructure that tourists engage in once they are within Cape Coral
- ***Marketing / Branding*:** represents the ways in which the destination is promoted and positioned to potential visitors.
- ***Organization / Collaboration*:** represents the way that Cape Coral and other key stakeholders within the industry and region interface to grow the industry collectively.

STRENGTHS

- ***Tourism Attractions / Infrastructure / Visitor Expérience***

1. Growing residential population, which can further encourage already existing strong category of Visiting Friends & Family travelers.
2. Changing demographic that is more amenable to change and development.
3. Major Home Rental Market for Vacationers – over 4,000 homes and 350 private rooms available.
4. Numerous opportunities to rent a house and boat together, canals enhance rental properties.
5. Major Hotel - Westin Hotel – significant anchor for tourism activity
6. Favorable location
7. Proximity to Airport, major highways, and neighboring tourist communities.
8. One of safest cities in Florida
9. Sports Tourism – an already existing, active, and effective government involvement.
10. Increasingly Strong Restaurant and Food Scene
11. Water Activities – boating, dolphin tours, fishing, kayaking
12. Winter warm weather destination (but lots of nearby competition)
13. Major League Baseball Spring Training nearby

14. Respectable Events Scheule including festivals, parades, and concerts

❖ ***Marketing / Branding***

1. Marketing to International (primarily German) tourists, helps with shoulder and off-season visitation.
2. A local chamber of commerce that assists with tourism promotion - runs welcome center (50-60,000 visitors a year), promotes events, strong Visit Cape Coral section of its website.
3. An active County VCB with a knowledgeable and experienced staff.

❖ ***Organization / Collaboration***

1. Tourism is included in Economic Development Planning – understanding of the importance of increased visitor activity to the future of economic vitality.
2. Local pride

WEAKNESSES / CHALLENGES

❖ ***Tourism Attractions / Infrastructure / Visitor Expérience***

1. Distance Between Attractions – Attractions located sporadically across the city. Significant distances between attractions, most of which are only accessible by car.
2. Limited Number of Hotel Rooms
3. Limited access to water for additional tourism development
4. Insufficient number of public boat ramps
5. No Defined Visitor Domain – a place that signals to tourists that it is a place for them to congregate, wander, stay, and extend their experience.
6. Limited Cultural attractions
7. Limited Night life
8. Limited Tourism related signage
9. Limited Retail Shopping Opportunities that are attractive to tourists
10. Limited Public Transportation options.
11. Insufficient large businesses, not enough hotel rooms, and competitive convention operation in Ft. Myers makes it impractical to prioritize convention / business tourism for Cape Coral.

❖ ***Marketing / Branding***

1. Limited cohesive strategy related specifically to Cape Coral
2. The city lacks a distinct visitor image - not a must see stop on itineraries of out-of-town tourists.
3. Not considered a destination city
4. Lack of Clear Identity that is easily recognizable and identifiable to visitors and distinguishes it from its nearby neighbors and competitors.
5. Lack of Compelling or Iconic Destination / Defining Attraction – No year-round, must see, attraction that brings consistent visitor traffic and defines the visitor image of the destination.
6. Limited Cross Promotion & Collaboration – the lack of cooperation impacts marketing and packaging opportunities for broader visitor appeal.

❖ ***Organization / Collaboration***

1. Limited collaboration / partnerships among public entities (local government, regional partners, tourism attractions, public-private partnerships, marketing organizations, community members, universities, philanthropic organizations) to enhance the tourism product and marketing to tourists.
2. Insufficient focus on tourism
3. Few philanthropic organizations provide funding for tourism related projects.
4. City does not have a strong base of corporate employment to attract regular business travel.

OPPORTUNITIES

❖ ***Tourism Attractions / Infrastructure / Visitor Expérience***

1. Further Develop & Promote Parks & Preserves – continue to build and enhance organized tours and trials to link together related activities by location and interest.
2. Distinguish City's Outdoor Recreational Assets – with increased emphasis on outdoor tourism, Cape Coral's outdoor assets may be seen as "generic' relative to its neighbors. The city needs to distinguish the unique experience and assts to enhance outdoor tourism as a trip driver.
3. Potential Additional Eco-Tourism Attractions
    a. Wetlands – Red Fish Point

b. Botanical Gardens
c. Ropes Course / zip lines
d. Stables (maybe at Yellow Fever Park)
e. Greater access to river and bay for boating
f. Bike Paths
g. Disc golf

4. Make canals more tourism friendly, create activities on the canals.
5. Canal Based events/festivals.
6. Guided Canal Tours
7. Water Taxis for River and Bay as well as canals.
8. Further develop and promote the already existing cluster of attractions that are family friendly.
   a. Sunsplash Water Park, new Racquet Sports Center, Gator Mikes Family Fun Park (Go Carts, Paint Ball, Mini golf, ropes and zip line), Dance theatre and aerial arts, bowling alley, skate park, Wicked Dolphin Rum Distillery
9. Enhance an already existing event schedule.
10. Enhance sports fields available for Sports Tourism to achieve greater participation in the already existing Lee County Sports Development program.
11. Create (develop) more public boat ramps with adequate parking facilities to encourage kayaking, jet skiing, and other activities.
12. Take advantage of Ft Myer's attractions (River Walk/First Street, Edison Ford Estate, beaches, etc.) by creating cross promotion initiatives.

❖ ***Marketing / Branding***

1. Build relationships with booking platforms like Airbnb, VRBO, Trip Advisor, Expedia, etc.
2. Develop package strategy to help promote attractions - package deals, joint ticketing, etc.
3. Educate Locals on the benefits of tourism and Cape Coral's tourism assets to build word of mouth advertising as well as gather support for tourism initiatives.
4. Engage and incentivize restaurants and merchants to take a more active role in tourism promotion and events.
5. Consider outreach to tour operators and travel media, i.e. fam trips and public relations initiatives.
6. Participate in collaborative marketing campaigns, trade shows, tourism fairs

❖ ***Organization / Collaboration***

1. Identify opportunities to collaborate with local Universities.
2. Consider use of Eminent Domain or Swapping Properties to develop tourism attractions.
3. Expedite permitting for development related to tourism.
4. Take advantage of VCB's free Customer Service Program (Guest First), i.e. train vacation rental hosts.
5. Obtain a clearer delineation of how much tourist tax Cape Coral contributes.
6. Obtain voting membership status for Cape Coral representatives on Ft. Myers VCB
7. Help strengthen cultural tourism by increasing funding and awareness of Cape Create program.
8. Pursue more TDC funding for Cape Coral related projects in all three categories; Attractions Marketing, Event marketing; Beach & Shoreline
9. Identify more champions / cheerleaders for tourism in the government and private sector.
10. Partnering – city, VCB, Chamber, South Cape Hospitality & Entertainment Association, universities, hotel & restaurant association, newspapers & radio station.
11. Create a small department or designate and individual within the Economic Development division of the Cape Coral City Manager's office with specific responsibility for tourism.

THREATS

❖ ***Tourism Attractions / Infrastructure / Visitor Experience***

1. Increasing traffic congestion & limited parking
2. Surrounding beaches drawing tourists from Cape Coral
3. Neighboring destinations increasing their tourism funding.

❖ ***Marketing / Branding***

1. Concern that FT. Myers Visitor's Bureau does not sufficiently promote Cape Coral
2. Insufficient data regarding Cape Coral's contribution of tourist taxes.
3. Limited awareness of tourism assets among locals
4. Ft. Myers VCB website has underrepresentation for Cape Coral
5. Surrounded by better known destinations.

❖ ***Organization / Collaboration***

1. Difficult and slow permitting process for new development.
2. Residents question community's leadership's understanding of the importance of and commitment to tourism.
3. Lack of influential tourism cheerleaders – not enough powerful, political, and private sector individuals to champion tourism and its economic benefits to the city.

7.d – Strategic Marketing Recommendations

Development of Major Goals

- Ensure that tourism is a major contributor to the area's economic growth and prosperity.
- Improve the area's quality of life.
- Improve Cape Coral's overall image regionally, nationally, and internationally.

Strategic Recommendations

The recommendations that follow are responsive to the major challenges and opportunities identified in the situation assessment and SWOT analysis. Recommendations are advanced in three categories:

- ❖ ***Tourism Attractions / Infrastructure / Visitor Experience*** sets forth recommendations to enhance the activities and infrastructure that tourists to the city encounter.
- ❖ **Marketing / Branding** sets forth recommendations related to the promotional efforts of Cape Coral.
- ❖ **Organization / Collaboration** sets forth recommendations as to how those responsible and involved in tourism in Cape Coral can interface with other private and public entities to enhance outcomes for the industry.

Recommendations in this section are reviewed in terms of their rationale and in terms of implementation:

- **Rationale --** connects each recommendation to the situation analysis and SWOT reviewed in this report, describing how it meets a strategic need or opportunity to build tourism in Cape Coral.

- **Implementation --** describes steps to be taken to achieve the recommended objective.

- **Timing** -- characterized as either short-term or long-term recommendations that lend themselves to immediate first steps or "quick wins" from those that require a more extended process. This section also sets forth the organizations needed to be involved, distinguishing recommendations that are largely within the purview of Cape Coral City Manager's office under its current mission and budget from those that require coordination or resources from external public and private sector actors.

- **Examples** – where relevant, examples from other destinations are included to provide additional context, with the understanding that applications will differ by location.

The implementation of any set of strategic recommendations over time must always in practice evolve to shifting conditions and opportunities. Therefore, recommendations are not labeled by priority level, but rather along two dimensions that help the city to understand and manage these opportunities.

TOURISM ATTRACTIONS / INFRASTRUCTURE / VISITOR EXPERIENCE

Goal #1: Support Efforts to Increase Activity and Access to Cape Coral's Waterfront

Rationale: The most unique aspect of Cape Coral is its relationship to water. In addition to the River and the Bay, it has an unusual 400-mile canal system. It is a destination that can and should provide a substantially wider range of water-related activities than its competitors. However, because of the city's development history - historic development patterns have led to limited commercial and recreational activity along the Caloosahatchee riverfront and the vast majority of the access to the canals is privately controlled - the water activity and access is substantially short of its potential. In addition to becoming an attractive tourist attraction, better use of the riverfront can improve the connectivity to attractions between Ft. Myers and the nearby islands. Recent trends have re-animated riverfront areas in cities across the country and have been successful in attracting additional attractions, helping to draw tourists, and enhancing the city's reputation as a tourist destination. The riverfront experience also represents a potential point of differentiation between Cape Coral and its nearby tourism competitors. While these infrastructure investments will take time, funding, careful planning, and community participation to develop, they present the most significant tourism opportunity to enhance the visitor experience in Cape Coral and make it a recognized destination.

Implementation: Locations for public and commercial access to the water need to be identified. The city needs to identify, attract, and work with private sector operators who can provide shoreline attractions, restaurants, etc. and activities such as Water taxis, themed boat tours, fishing, sailing lessons, jet skiing, specialty boats, kayaks, canoes, etc.

Timing: Long-Term • Driver: Public/Private sector led

Example: San Antonio, TX is one of the most well-known riverfront tourism successes. Cape Coral doesn't control sufficient river or bay front property to build on the scale of San Antonio or even Providence or Cincinnati. A more relevant example, on a smaller scale is Bristol Waterfront Park in Bristol, PA. It is an active riverfront park located on the banks of the Delaware River. The park attracts visitors with ample opportunities for outdoor recreation such as concerts, festivals, boating, and outdoor dining. Moreover, the park includes several place-based strategies, including docks for fishing, monuments, and a wharf for boating. Bristol Waterfront became one of the main destinations in the borough as a complement to Bristol's historical sites and attracts crowds generating a vibrant community space.

Goal #2: Continue to Develop and Promote Experiential Tourism Product by Expanding Outdoor Activities within the City

Rationale: There is a growing emphasis on experiences over material goods in many cultures. Families value shared experiences and creating memories together more than ever before. With the increased proliferation of information, travelers continue to seek to connect to destinations on an emotional level and experience the "hidden" and "authentic" experiences that are unique to a location. For a destination like Cape Coral without a signature anchor attraction or "touristy" area, this trend presents an opportunity to compete with better known destinations. Creating and promoting these experiences requires consistent effort and collaboration to bring ideas to fruition and get the visitor experience visitor ready. Companies such as Airbnb have understood this trend and developed "Airbnb Experiences", which connects local tour and activity providers with travelers who want to experience interesting activities in their vacation destination with a knowledgeable local. Cape Coral's inhabitants can provide experiences along these lines. For instance, the many different types of boating activities can be more interesting and safer when provided by a skilled local. Cooking and cocktail making classes at the city's restaurants, animal encounters in the Eco parks and on the water, and a photography tour are additional examples.

Implementation: Work with the vacation rental community and hotels to identify, develop, and promote visitor experiences such as: • Outdoor and water adventure activities (zip lines, flooms, boating, etc.) • Food and drink (interactive experiences at restaurants and brew masters) • Arts and culture programming (opportunities to meet artists, tour cultural and historic locations).

Timing: Short-Term • Driver: City-Led, partner with VCB to make it part of the training in its Guests First program and target hosts of vacation rentals.

Goal #3: Explore Opportunities to Work with Short-Term Rental Providers

Rationale: Short-term rental sites (like Airbnb, VRBO, Booking.com, HomeAway) have captured a material share of the visitor market, expanding their reach further during the pandemic. Stays generated through these sites are generally longer than hotel stays and have been brought within the hotel tax regulatory framework in Cape Coral, meaning that they can generate considerable dollars to support tourism promotion efforts. Cape Coral has an unusually high presence on these sites. On Airbnb alone, there are over 4,000 homes and 350 private rooms available for rental in Cape Coral. By comparison, Fort Lauderdale has around the same number of active listings, while Tallahassee has around 1,000. Rochester, NY has around 1,300 active listings, Frisco, TX around 1,000. Cape Coral should work closely with short-term rental providers. Such a partnership could help the local hosts by educating them to be more successful; provide tourism information and improved experiences to their guests visiting the city; and should a collaboration with these various platforms be achieved, Cape Coral's marketing would benefit by reaching the various platform's global audience.

Implementation: Cape Coral has recently conducted research to identify and understand the inventory and location of properties that appear regularly on sites like Airbnb. Airbnb has formal partnerships with various destinations around the world — working with these locations to educate locals on hosting/home-sharing as well as co-promoting travel to the destinations. Here are some examples: https://news.airbnb.com/tag/dmo/ https://news.airbnb.com/an-update-on-our-work-to-strengthen-our-communities/ These initiatives are led by the public policy team. publicpolicy@airbnb.com Ft. Myers VCB has worked with Airbnb in the past regarding recovery from Hurricane Ian. Some opportunities to work with various rental providers can include: • Develop partnership with the various rental platform sites to help with acquiring new listings and joint promotions. • The Ft. Myers VCB, nonprofit, or university partners can work to educate the destination's current and potential hosts to provide a better experience for the visitors and better manage their businesses to be more profitable. • Work anywhere initiative to promote Cape Coral as a desirable and remote-worker friendly destination for short-term stays that tie into tourism and leisure activities. Explore opportunities to engage with these operators and help them attract tourists and develop more tailored experiential components for the platforms. Marketing the rentals and experiences would also entail educating the renters by providing them with information and materials about the nearby attractions that their tenants can enjoy.

Timing: Short-Term • Driver: City, working with VCB, Cape Coral Chamber of Commerce, universities, and relevant nonprofits.

Example: The Russell Innovation Center for Entrepreneurs (RICE) and Airbnb created a partnership called the Entrepreneurship Academy in Atlanta. The initiative supports local residents in embracing the economic opportunities created by hosting and entrepreneurship, The Academy, provided by Airbnb, is a flexible and interactive education program focused on empowering more people from diverse communities – in Atlanta. The Academy offered two distinct programs to better understand the barriers that the Atlanta community faces, support entrepreneurs and unlock tourism potential, and identify solutions and educational materials to support community members who want to become successful Hosts on Airbnb. To help more travelers visit Georgia black-owned farms, Airbnb partnered with New Communities Land trust to promote the Southwest Georgia Agri-tourism Trail, a collection of stays and experiences.

Goal #4: Further Develop the Already Existing Family Activity Cluster

Rationale: Child friendly activities/entertainment are particularly valuable for Cape Coral as a draw for visiting friends and family tourism, mutigenerational tourism, and residents' quality of life. With most of the city's attractions widely disbursed, one existing cluster of attractions relates to activities that are popular with youth. They are located in close proximity near Kennedy Lake - Sunsplash Water Park, new Racquet Sports Center, Gator Mikes Family Fun Park (Go Carts, Paint Ball, Mini golf, ropes course and zip line), Dance Theatre and Aerial arts, bowling alley, skate park, and Wicked Dolphin Rum Distillery. Currently, however, there is no connectivity between these attractions and no supporting infrastructure – restaurants and tourist retail.

Implementation: Step one is to bring the current attractions together to obtain ideas as to how they can work together to better deliver a coordinated product, determine what else should be added to the mix, and how to better market and brand the family activity cluster. Step Two is to identify additional family related activities such as disc golf, laser tag, golf driving range, and indoor gaming arcade with ax throwing, climbing walls, etc. Step three is to identify supporting infrastructure, such as restaurants and retail. Step four find interested developers to build the attractions and infrastructure, and Step five is to help those developers achieve their objectives. Step six is to actively market this family friendly activity cluster.

Timing: Step One Short-Term; Steps Two and Three Long Term Driver: City together with current and future attractions.

Example: Adventure Crossing USA is located adjacent to Six Flags Great Adventure in Jackson Township New Jersey and near recently built outlet malls located in the area. Adventure Crossing is being built as a mix of a retail dining and entertainment complex. The complex has a deluxe driving range and surf park and wave pool, as well as multiple buildings that house a large gaming arcade, laser tag, sports bar, ax throwing, climb wall, and multiple restaurants. It is being designed to complement the Six Flags experience and become a regional tourism magnet.

Adventure Crossing USA | Golf & Entertainment Treetop Quest is an aerial adventure park with obstacle ropes course and ziplines with locations in located in Gwinnett and Dunwoody, Georgia; Greenville, South Carolina, and Philadelphia. Courses and tickets are available for both youth and adults. The treetop is primarily a self-guided activity involving climbing, obstacles, and zip lines. Group outings for schools, with lessons connected to environmental science, biology, physics, and physical education are available. The site also hosts corporate outings with leadership lessons.

Goal #5: Leverage Current Assets and Create New Ones to Further Develop Youth, Adult & Scholastic Sports Facilities

Rationale: Sports tourism is multifaceted in that it combines travel, sports, and cultural exchange. It offers numerous benefits to destinations and participants alike. Its growth necessitates careful planning to maximize benefits while minimizing potential downsides, ensuring that it remains a positive force for economic and social development. This type of tourism can be classified into various categories, each catering to different interests and activities within the realm of sports. These categories include Event-Based Sports Tourism - Traveling to attend major sporting events; Active Sports Tourism - Traveling to participate in sports and recreational activities such as golfing, hiking, scuba diving, or marathon running and amateur athletes traveling for competitions or training camps. Nostalgia Sports Tourism - Traveling to visit sports-related attractions such as sports museums, halls of fame, or historic sports venues; Celebrity and Icon Sports Tourism - Travel motivated by the chance to see or meet sports celebrities and icons, including attending events like autograph signings, sports conventions, or personal appearances by athletes. Lee County understands the value of sports tourism and has a stand-alone department, the Sports Development Department, dedicated exclusively to sports tourism and which works very closely with the County's Parks and Recreation Department. The county attracts a full calendar of youth, college, and adult competitions and training programs and a significant number of visitors to attend the Red Sox and Twins spring training. As a result, the region has a vibrant sports tourism program. Unfortunately, because the quality and quantity of the sports facilities and fields in Cape Coral are not as good as in Ft Myers and because there are fewer hotel rooms and less family friendly activities, it receives a smaller share of the benefits of this important tourism driver. By devoting resources to several related areas, Cape Coral can better benefit from the already strong sports tourism to the region.

Implementation: Cape Coral can obtain greater benefit from Sports tourism by 1) upgrading the current fields and building new ones; 2) enhancing and promoting Cape Coral's already existing Family Activity Cluster (see #4 above); 3) working together with the Westin and other Cape Coral hotels to market to the sports tourism participants; 4) working with the home vacation rental hosts to target the youth, scholastic, and adult athletes coming to the region to compete and train and to those coming to watch spring training baseball; 5) working together with the Athletic Division to develop Pickleball competitions at the new Racquet Facility and making the sports tourism visitors aware of Cape Coral's strong food scene.

Timing: Long Term; City together with various organizations depending upon which of the above activities are pursued.

Goal #6: Enhance & Develop New Visitor-Focused Events

Rationale: Event tourism is a specialized segment of the tourism industry that focuses on the planning, development, and marketing of events to attract visitors to a destination. These events can range from small local festivals to large international gatherings and can include a variety of types such as cultural festivals, sports competitions, music concerts, conferences, and exhibitions. Event tourism is designed to enhance a destination's appeal, stimulate economic activity, and provide memorable experiences for both locals and visitors. Events can also be valuable by helping to attract visitors during off-peak seasons, thereby stabilizing tourism flows throughout the year and it is often leveraged to attract additional investments for tourism and other economic development related activities. In addition, events provide small businesses an opportunity to market and sell products and to share and display local pride. Cape Coral already has a base of events but can benefit from additional events that are tourist focused and highlight activities that promote the city's strengths. By carefully planning, marketing, and sometimes managing events, Cape Coral can leverage these occasions to attract new types of visitors, stimulate its economy, and create lasting positive impacts on its infrastructure.

Implementation: The City's role is to stimulate and act as a catalyst to create new events that will attract tourists. Develop a committee that will review the current schedule with the objective of finding ways to enhance or create new events and festivals. Concentrate on those assets that are unique or particularly strong in Cape Coral. A pickleball tournament at the new Racquet facility, water related events such as boat races and fishing competitions, and food and music related events promoting the restaurant and food scene are examples. Have the employee and interns referenced in Recommendation #3 under Organization / Collaboration work with local partners to recruit vendors, participants, and sponsors. This individual would also have other tourism related responsibilities relating to other recommendations made in this report.

Timing: Long Term – work with partners who have expertise for the proposed events and with organizations such as the Chamber of Commerce and VCB.

Goal #7: Support the Development of More Unique Local Dining Options & Enhanced Evening Activities

Rationale: Cape Coral has an increasingly strong restaurant and food scene and is becoming known in the County as a place to dine out. A good restaurant scene is important to tourism for several reasons: 1) Food is a significant part of a region's culture. Tourists often seek to experience local cuisine as a way to understand and appreciate the culture and traditions of the place they are visiting. A vibrant restaurant scene can showcase the local flavors and culinary practices; 2) High-quality and diverse dining options can attract tourists to a destination and encourage them to stay longer. Memorable dining experiences can be a highlight of a trip, making tourists more likely to recommend the destination to others and to return themselves; 3) Restaurants contribute significantly to the local economy by creating jobs and supporting local suppliers. 4) Destinations known for their exceptional food scenes can use this reputation as a key marketing tool. Culinary tourism is a growing trend, with many travelers specifically seeking destinations known for their food and dining experiences; 5) Dining out is a social activity that often includes entertainment, ambiance, and an opportunity to relax and enjoy the surroundings. A lively restaurant scene can enhance the overall entertainment options for tourists, making the destination more appealing: 6) Positive dining experiences can lead to good reviews and high satisfaction among tourists. This can improve the destination's overall reputation and rankings on travel review platforms, attracting more visitors; 7) A diverse restaurant scene caters to various dietary preferences and budgets, ensuring that all tourists can find dining options that suit their tastes and needs. This inclusivity enhances the overall appeal of the destination. For all these reasons, it is a good idea to enhance what is already an important component of Cape Coral's attractiveness.

Implementation: Identify ways to further develop infrastructure in the "food" zones and recruit restaurant operators to open unique concepts and differing cuisines in concentrated areas. Possibly create a kitchen incubator to support the growth of small food businesses that expand dining option in the city and communicate with local universities to investigate their interest in a culinary school.

Timing: Long -Term – work with restaurant association, potential developers, the Chamber of Commerce, South Cape Hospitality & Entertainment Association, and nonprofit organizations focused on entrepreneurship and workforce development.

MARKETING / BRANDING

Goal #8: Encourage Cross-Promotion and Joint Packaging among Related Attraction

Rationale: The visitor experience is strengthened when multiple activities are linked together. Coordinating multiple activities increases the chance that a trip yields additional overnight stays and sends a message that multiple attractions are compatible, and a destination is robust even for visitors that do not book the package directly. This linking can take multiple forms, from agreements among locations to cross-promote each other's offerings, collaborative participation under a common umbrella of a "trail" to direct joint-promotion of discounted combined tickets.

Implementation: The Economic Development division of the City Manager's office can serve as a formal and informal convener and facilitator of partnership conversation among related attractions. These partnerships could be incentivized by promotional opportunities offered by the city or VCB. One example to pursue would be the family friendly attractions described in Recommendation # 4 described above. A broader approach is to develop a Cape Coral Pass that leverages partnerships between attractions, transportation services, hotels, and dining establishments to create value-packed deals that encourage tourists to explore more of what the destination has to offer.

Timing: Long-Term • Driver: Partner-Led but city assisted by city.

Goal #9: Develop Locally Focused Marketing Efforts to Energize & Educate locals about Tourism in Cape Coral

Rationale: It is important that locals become aware of the commitment that is being made to tourism and that an overall plan and specific activities have been initiated. This increases the likelihood of buy-in for tourism development from community stakeholders and elected officials. Members of the community can provide some of the best "word of mouth" advertising for the city by informing family, friends, and business colleagues of the benefit of visiting Cape Coral. In addition, tourism advertising targeted at locals will help attract residents and host vacation rental landlords to various attractions they are unaware of and help increase local pride. The return on investment is often worth taking some money away from traditional target market tourism marketing campaigns.

Implementation: Devote a small marketing budget targeted to locals to promoting the city's tourist attractions and overall plan. Host a one-day tourism summit for key leaders and stakeholders with speakers highlighting tourism assets and potential tourism development activities. Provide space at the tourism summit for individual attractions to have booths to promote themselves.

Timing: Short-term Coordination among City, VCB, and Chamber of Commerce.

Goal #10: Consider a Co-op Marketing Approach with Certain Attractions

Rationale: Co-op tourism marketing allows organizations like the VCB and the City to partner with attractions, restaurants, and tourism related retailers to pool marketing budgets and messaging, helping them more easily scale campaigns, reduce resource constraints, and pursue larger marketing efforts by offering new opportunities for campaign messaging, communications channels, and engagement tactics. Co-op marketing allows attractions to access high-value placements that they would struggle to achieve with their own resources. The VCB currently has a co-op advertising program, however, it is important to ensure that Cape Coral organizations take greater advantage of this program and find new ways to stretch their marketing dollars and test new/emerging tactics.

Implementation: Develop a list of attractions and businesses to target for joining co-op marketing opportunities.

Timing: Short Term - Work with VCB, Chamber of Commerce, and attractions.

ORGANIZATION / COLLABORATION

Goal #11: Tourism Leadership & Collaboration / Partnerships

Rationale: A primary reason that Cape Coral has not fulfilled its potential as a tourist destination is because there is insufficient discussion or understanding of the value or impact of leisure tourists visiting the city. As a result, leisure tourism has not been a priority. To build and maintain a successful tourism environment it is necessary to have two important ingredients; 1) Individuals with power and community respect who are willing to take on leadership roles to champion or be cheerleaders for tourism and 2) Effective and dynamic partnerships. The experiences and amenities that appeal to visitors to a destination often align with those that appeal to residents and businesses, and many destinations have sought to unify messaging and branding between tourism, business, and residential attraction efforts. Greater alignment and coordination are critical goals as Cape Coral has limited resources and staff capacity for its existing focus on the core audience of potential visitors.

Tourism ecosystems depend on numerous public and private partners working together to thrive and reach their potential. Destination marketing organizations have an important role to play but cannot position the industry for success all on their own. The City Manager's office needs to be active in 1) looking for potential collaborators that can help achieve results for the industry; 2) facilitating collaborations between members of the industry; and 3) maximizing the resources available to the city and its positioning within the tourism ecosystem. Such collaborators could be tourism attractions; the Chamber of Commerce; other city and county agencies such as Parks & Recreation, Sports Development, and the planning commission; public/private partnerships; philanthropies; universities; neighboring cities, towns, and villages. These potential collaborations and partnerships will help provide opportunities to further develop Cape Coral's credibility and identify resources, both money and manpower, that are available to expand its impact.

Implementation: Appropriate, well respected local leaders with an interest in and knowledge of tourism and hospitality need to be identified and approached about taking an active role in leading the charge to improve the tourism environment in Cape Coral. In addition, coordination meetings with planned agendas are needed among the potential partner organizations. Where possible, Cape Coral can seek to ensure that its tourist-facing messaging is compatible with (which does not necessarily mean identical to) messaging aimed at business and resident attraction. These collaborations and partnerships should facilitate the greater sharing of resources such as video, photography, and written content on city experiences and amenities. Additional funding sources will be needed for the city to effectively expand its impact through more destination management activities and greater alignment with county efforts to attract visitors.

Timing: Short-Term • Driver: City - Led together with various potential partners

Goal #12: Engage Higher Ed Institutions as a Catalyst

Rationale: Universities are closely tied to tourism activity in many destinations. Narrowly, higher ed institutions draw visitation in the form of parents and friends, and their students are looking to engage in off-campus activities. More broadly, these institutions have a vital interest in the quality of life of the region as they compete to attract students, faculty, and staff. As a result, university leaders are often important participants in economic development, and can be leaders in visioning long-term improvements. There are several higher ed institutions in Lee County that are strategically located, and well-positioned to help support issues relevant to the tourism industry. In particular, Florida Gulf Coast University, which has specifically related programs at the School of Resort & Hospitality Management and the Water School.

Implementation: Call a meeting of the relevant individuals at the various educational institutions of higher education and engage with them on potential areas for partnership. These include organizational and board participation, placemaking advocacy within the county and city economic development efforts. Universities may be interested partners in efforts to create workforce development pipelines that help address workforce gaps in the tourism industry and providing research and expertise through professors and internship programs.

Timing: Long-Term • Driver: City and University partners

Goal #13: Designate an Individual within the City Manager's Office to be responsible for Tourism

Rationale: Cape Coral needs to have a more clearly defined focus and take greater responsibility for increasing the number of visitors it attracts**.** While much of the work and resources should be provided by partners, there is a great deal of planning, coordination, and implementation that needs to be accomplished if Cape Coral is to be successful. A city employee should be designated as the individual responsible for tourism. This person will serve as liaison to various organizations (VCB, Chamber of Commerce, Hotel & Restaurant Association, Sports Development Department, South Cape Hospitality and Entertainment Association, etc.) on issues relating to tourism including product and event development, marketing, partnerships, and funding. Such a personnel commitment will help the city keep tabs on and help coordinate all tourism related activities that are going on in the city and county, provide leadership and help determine priorities, and show the community how the city has embraced the importance of tourism. Many of the recommendations listed above require an active participation by the city, and having one individual who has a command of everything that is going on will be essential.

Implementation: Finding resources for new personnel is rarely easy**.** The city should begin by giving the tourism responsibility to the appropriate person who is already on staff. It should then find one or two interns to assist this person. Finding tourism interns from the School of Resort & Hospitality Management at Florida Gulf Coast University would make sense. Over time, the city should review the current and expected future amount of tourism related work by the individual from the City Manager's office and the interns, and the return on investment from having the tourism person on staff to determine what resources are needed.

Timing: Short term – City-led

Example: Some regions only have destination management organization responsible for tourism, others have a government employee or staff responsible, and some have both.

7.c Task 7 Progress Report/video conference

We conducted a video conference with the Project Review Committee on June 19, 2024. Work product to date was discussed and the materials covered were previously uploaded to the website.

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Economic Development Strategic Plan - RCM2342AS

Task 8 Report

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July 17, 2024

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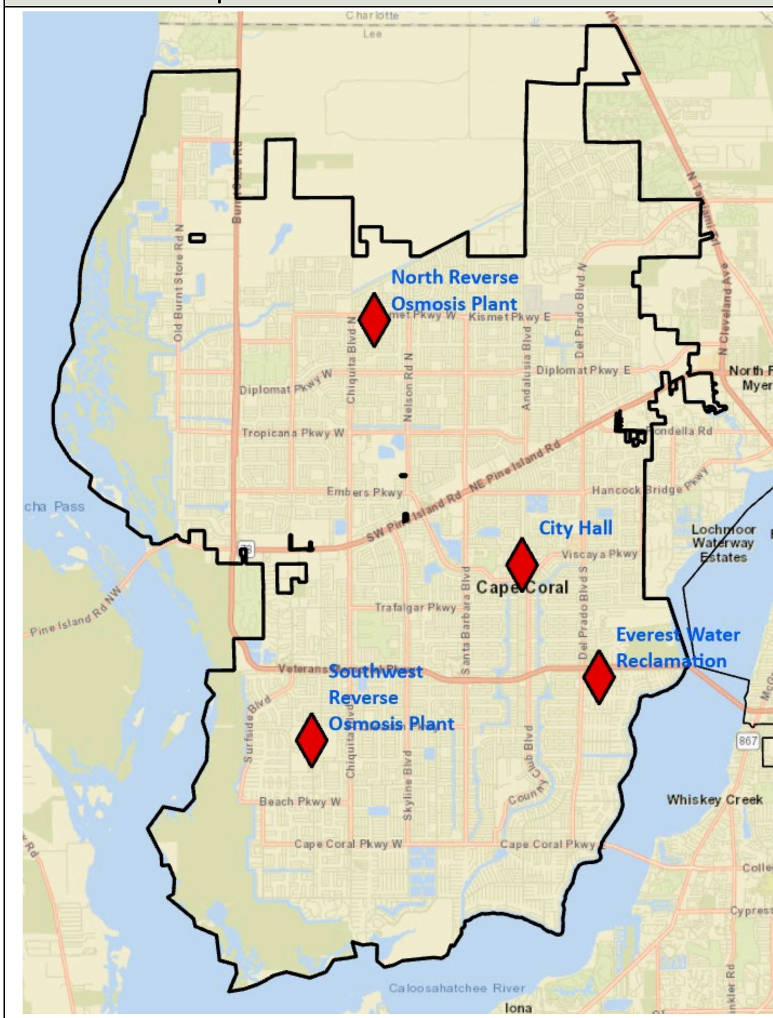
Task 8: Infrastructure Analysis

8.a – The Need for Speed

The City of Cape Coral Information Technology Plan 2023 recommends expansion of the City's fiber ring to additional City assets. Primarily, those assets include:

- Parks
- Fire Stations
- Utilities
- Wells
- Master pumping stations

Exhibit 8.1 – Cape Coral Data Center Locations



Interviews with the Cape Coral Information Technology Service Department (ITS) have revealed that to meet the cabling goal, approximately **142** miles of fiber optic will be installed. According to the City's Information Technology Services (ITS) Dept., approximately **40%-50%** of the objective has been met. ITS indicates that completion of the effort will be by the end of **2027**.

At this time, about **30%** of parks in the City have WIFI capability. As a means of managing the complex network, the City operates **four** municipal data centers located at: City Hall, the Southwest Reverse Osmosis Plant, the North Reverse Osmosis Plant, and the Everest Water Reclamation Center. These locations are shown in the map graphic (right).

Fiber Optics

The fiber optic cabling installation will connect **65** City locations and **139** utility assets. To accomplish this, the Utility Expansion Project (UEP) in coordination with Information Technology Serviced (ITS) is burying "dark fiber" conduits in all new utility trench excavations. This cooperative arrangement will reduce the cost and timelines for fiber optic services to needed City location as well as residential area expansions.

The initial costs for fiber-only installation was estimated at $100,000 per mile. The national average for fiber installation is within the $60,000 to $80,000 per range, making Cape Coral a more expensive location. An ITS analysis conducted for the City Council in 2024 of fiber-versus-satellite found in favor of fiber optics. Co-working with the UEP will continue to reduce capital expenditure (capex) costs going forward. The City has operating agreements with private contractors (Summit Broadband, Lightspeed Construction, Intelligent Infrastructure Solutions) as well as Lee County on dark fiber installation and leasing. Although the project RFP asks for an analysis of potential partnerships with private contractors on installation costs reductions, the recent ITS-UEP cooperation has made the need for this analysis moot and will not be undertaken in this study.

A Potential Revenue Source

As new fiber optics demand is projected, the City is installing a 288-strand dark fiber in conduit in cooperation with Utilities construction. Of this cable, 144 strands will be dedicated to City use (50%), and another 72 strands will be left in reserve. This would leave 72 strands (25%) as possibly redundant. The City's ITS suggests that a maximum of 120 miles of cable should be considered for lease.

Leasing of excess dark fiber by municipalities to a variety of commercial or institutional enterprises is common:

- Manufacturing and logistical companies
- E-commerce and retail operations
- Schools
- Hotels
- Government institutions
- Internet providers
- Telecommunication companies

Leasing Rates

Research into commercially available dark fiber from Nashville, TN indicates that leasing is based on a descending mileage scale starting at $144 per strand per mile per month in a 0 to 15-mile range down to $80 for 51+ miles. Added to this would be a monthly maintenance fee of $5 per strand per mile.

We will assume that the City of Cape Coral will be somewhat more affordable than a commercial provider and use the monthly figures of **$75** per strand per mile, for over 60 miles, or **$90** per strand per mile, for less than 60 miles. The problem is that a company or institution may likely need only a portion of the available strands, such as 12 or 24 pairs, or perhaps for shorter distances, so finding others to lease the balance will require targeted marketing.

For dark fiber leasing, there are 2 types of leases: Indefeasible Right of Use (IRU) or Short-Term. Since the City may need to recapture use of the unused strands in the future, we would recommend Short Term leases of a maximum of five years over IRU. In the following tables, scenarios are presented that calculate potential revenues for the City from dark fiber leasing:

Scenario 1 – 72 strands use; maximum mileage					
Item	Monthly Cost	Months	# of Strands	Miles	Total
Dark Fiber Lease	$75	12	72	120	$7,776,000
Maintenance	$5	12	72	120	$518,400
Total Annual Revenue					**$8,294,400**

Scenario 2 – 36 strands use; maximum mileage					
Item	Cost	Months	# of Strands	Miles	Total
Dark Fiber Lease	$75	12	36	120	$3,888,000
Maintenance	$5	12	36	120	$259,200
Total Annual Revenue					**$4,147,200**

Scenario 3 - 18 strands use; maximum mileage					
Item	Monthly Cost	Months	# of Strands	Miles	Total
Dark Fiber Lease	$75	12	18	120	$1,944,000
Maintenance	$5	12	18	120	$129,600
Total Annual Revenue					**$2,073,600**

Scenario 4 – 72 strands use; 50% mileage					
Item	Monthly Cost	Months	# of Strands	Miles	Total
Dark Fiber Lease	$90	12	72	60	$4,665,600
Maintenance	$5	12	72	60	$259,200
Total Annual Revenue					**$4,924,800**

Scenario 5 – 36 strands use; 50% mileage					
Item	Monthly Cost	Months	# of Strands	Miles	Total
Dark Fiber Lease	$90	12	36	60	$2,332,800
Maintenance	$5	12	36	60	$129,600
Total Annual Revenue					**$2,462,400**

Scenario 6 – 18 strands use; 50% mileage					
Item	Monthly Cost	Months	# of Strands	Miles	Total
Dark Fiber Lease	$90	12	18	60	$1,166,400
Maintenance	$5	12	18	60	$64,800
Total Annual Revenue					**$1,231,200**

Scenario 7 – 72 strands use; 25% mileage					
Item	Monthly Cost	Months	# of Strands	Miles	Total
Dark Fiber Lease	$90	12	72	30	$2,332,800
Maintenance	$5	12	72	30	$129,600
Total Annual Revenue					**$2,462,400**

Scenario 8 – 36 strands use; 25% mileage					
Item	Monthly Cost	Months	# of Strands	Miles	Total
Dark Fiber Lease	$90	12	36	30	$1,166,400
Maintenance	$5	12	36	30	$64,800
Total Annual Revenue					**$1,231,200**

Scenario 9 – 18 strands use; 25% mileage					
Item	Monthly Cost	Months	# of Strands	Miles	Total
Dark Fiber Lease	$90	12	18	30	$583,200
Maintenance	$5	12	18	30	$32,400
Total Annual Revenue					**$615,600**

In summary the nine scenarios produce a median annual figure of **$2,462,400**, corresponding to Scenario 5 as the most likely outcome:

Leasing Scenarios	Annual $
Scenario 1 – 72 strands use; maximum mileage	$8,294,400
Scenario 2 – 36 strands use; maximum mileage	$4,147,200
Scenario 3 - 18 strands use; maximum mileage	$2,073,600
Scenario 4 – 72 strands use; 50% mileage	$4,924,800
Scenario 5 – 36 strands use; 50% mileage	**$2,462,400**
Scenario 6 – 18 strands use; 50% mileage	$1,231,200
Scenario7 – 72 strands use; 25% mileage	$2,462,400
Scenario 8 – 36 strands use; 25% mileage	$1,231,200
Scenario 9 – 18 strands use; 25% mileage	$615,600
Median	**$2,462,400**

Given that short-term leases will run for five years, the table below shows the revenue estimates for the lease periods including escalation based in inflation of 3 percent. Operations are estimated at $15,000 per year and escalated thereafter; a first year-only marketing allowance of $50,000 is assumed to secure required five-year leases.

Escalation	3.00%	Year 1	Year 2	Year 3	Year 4	Year 5
Income subtotal						
Dark fiber lease	$ 2,462,400	$ 2,462,400	$ 2,536,272	$ 2,612,360	$ 2,690,731	$ 2,771,453
Maintenance	$ 129,600	$ 133,488	$ 137,493	$ 141,617	$ 145,866	$ 150,242
Income subtotal		$ 2,595,888	$ 2,673,765	$ 2,753,978	$ 2,836,597	$ 2,921,695
Expenses subtotal						
Operations	$ (15,000)	$ (15,000)	$ (15,450)	$ (15,914)	$ (16,391)	$ (16,883)
Marketing	$ (50,000)	$ (50,000)	$ -	$ -	$ -	$ -
Expenses subtotal		$ (65,000)	$ (15,450)	$ (15,914)	$ (16,391)	$ (16,883)
Revenue Grand Total		**$ 2,530,888**	**$ 2,658,315**	**$ 2,769,891**	**$ 2,852,988**	**$ 2,938,577**

The five-year revenue total is shown below. A **7%** discount rate is used to calculate the Net Present Value (NPV), resulting in a total revenue projection of **$11,207,906** for the five-year lease period in current dollars.

Net Present Value	
Year 1	$ 2,530,888
Year 2	$ 2,658,315
Year 3	$ 2,769,891
Year 4	$ 2,852,988

Year 5	$ 2,921,695
Total revenue	**$ 13,733,776**
Discount Rate	7%
NPV	**$ 11,207,906**

Clearly, an **$11.2 million** profit to the City should encourage the leasing of excess dark fiber. As a cautionary note, however, it must be stressed that the excess fiber capacity is, in reality, not needed for future expansion within the five -year lease consideration.

As a caveat, the City has contractual restraints with Lee County DOT that could impact this lease scenario. To save costs in building out the fiber ring conduit sharing agreements are in place with Summit Broadband and Lee County DOT. The Lee County DOT agreement states, "The County and the City shall not lease or otherwise allow any third parties to use fiber optic cables or conduit provided by the other Party hereunder."

Smart Cities

Smart cities rely on data being collected, distributed and shared in real-time with all relevant stakeholders, from municipal staff to businesses and citizens[1]. The building blocks for successful smart city development include the following:

- A comprehensive 4G/5G communications network that spans the municipality in Real-time
- Internet of Things (IoT) sensors, deployed to collect a range of data, from air quality and traffic volumes to energy usage and water levels
- Open standards for data, that mean they can be easily shared internally and externally
- User friendly interfaces to deliver information to citizens, businesses and staff. These could be online portals, digital signage, apps, connected cars, or data visualizations
- Ways of analyzing/using data (such as AI, digital twins, and automation), enabling effective action to be taken, based on up-to-date information

The City of Cape Coral has embarked on a smart city infrastructure through the innovations shown below:

- Surveillance cameras
- Public Wi-fi

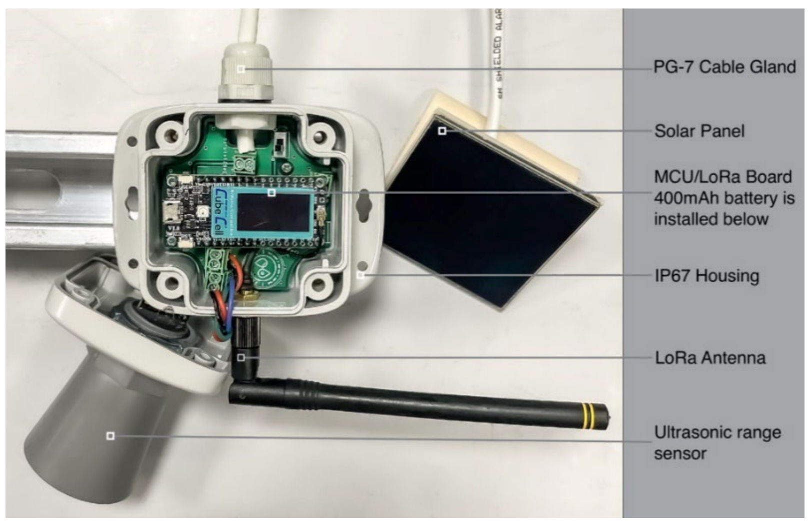
[1] OpenDataSoft; "Harnessing Open Data to Create Smart Communities"; ebook; 2022

- Informational kiosks
- License plate readers

FloodWatch Cape Coral

We would recommend that the City's Utilities and Public Works departments be engaged to consider Real-time IoT sensors that monitor street flooding and other resiliency information that can be integrated with Cape Coral's 3-1-1 network. An Innovative flood monitoring system was recently developed in New York City for its low-lying neighborhoods prone to street flooding due to high tides, storm surge, and stormwater runoff.

FloodNet[2] is a series of real-time flood sensors created by New York University and the City University of New York's CUNY Advanced Science Research Center (ASRC), with a goal of providing information on the presence, frequency, and depth of hyperlocal street-level flood events to a range of stakeholders, including policymakers, government agencies, citizens, emergency response teams, community advocacy groups, and researchers.



The FloodNet technology is open-sourced and free to use. We have already contacted the Florida Gulf Coast University's School of Entrepreneurship about developing a grant program to construct these flood sensors for municipal use. For more information, contact the FloodNet team at: Info@floodnet.nyc

[2] FloodNet; https://www.floodnet.nyc/

8.b – Physical Infrastructure

With a growing public, the need for physical services is an ongoing requirement. We discussed the issue with Public Works and Utilities to discuss the Utilities Extension Project (UEP).

Water & Sewer

As part of this study, four areas within the City of Cape Coral are being evaluated for their role in promoting economic development. They are as follows:

- N. Del Prado Commerce Park (formerly Academic Village)
- Burnt Store 300 site
- Downtown and the CRA
- Pine Island Corridor

Ascertaining that these sites are served by adequate water and sewer infrastructure is vital for their implementation.

N. Del Prado Commerce Park

From the UEP master plan, the N. Del Prado Commerce Park would be within in the North 1 UEP area. At this point, we are envisioning up to about 1.5 million sf of new office space and about 500,000 sf of new flex industrial space, plus a new public library. For office use at an estimate of about .005 gal/hr/sf, the office sewer flow could be as much as 9,000 gal per hour. The Cape Coral Utilities Dept. was queried about this demand and in response, indicated that potable water distribution and supply capacity relative to existing and projected water demand and wastewater collection would be evaluated.

Burnt Store 300 site

For the Burnt Store 300 property (and added parcels), we believe that a new executive airport, up to about 1.2 million square feet of warehouse/industrial space, and about 60 acres of recreation fields could be accommodated. The Utilities Dept. provides utility service to the City Limits on Burnt Store Rd. The Burnt Store 300 would be within the North 11 UEP area, which includes the new housing and mixed use project at Hudson Creek. Warehousing would have significantly less water/sewer demand compared to office use, but there might be an industrial process established there that might need high volumes of water – unless supplying it would be a problem.

Downtown and the CRA

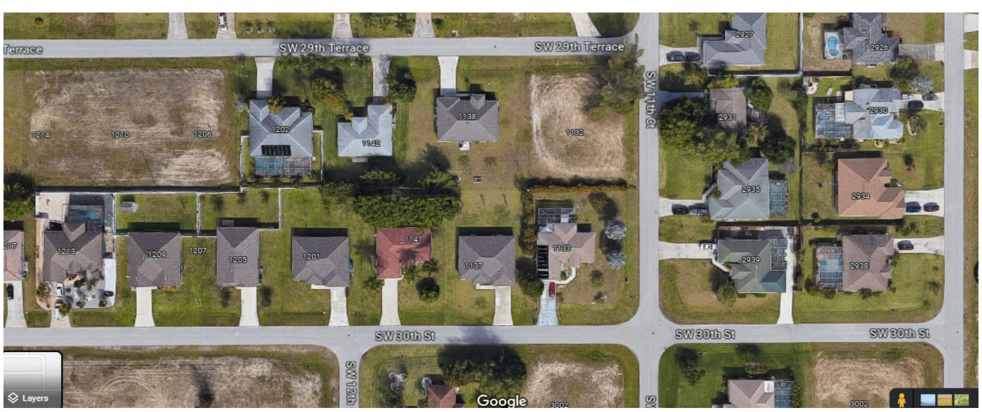
With projects such as The Cove and Bimini Square already taking shape in the downtown area, the City of Cape Coral will be witnessing a resurgence of activity within the CRA. With the acquisition of the former Golf Course, this area has great potential. To complete the picture, we are proposing the development of new Civic Center and waterfront entertainment district. Our estimate is for a 3,000-seat multi-use facility. Estimates for water use is 2 gal / seat / event. Planning on perhaps 60 events per year, that would equate to at least 360,000 gallons of water per year. Given the scale and density of downtown projects, we do not foresee any significant impact on water and sewer from this proposal.

Pine Island Corridor

The Pine Island Corridor project extends from Chiquita Blvd. S. to Burnt Store Rd. It will serve major projects such as the new Town Square. This UEP project area as well as the length of Pine Island Rd. and project northward will be competing for water resources. The Utilities Dept. will need to carefully balance resource allocation on a case-by-case basis.

Solar Infrastructure

A casual examination solar use reveals few instances of roof-top solar being employed in Cape Coral (see photo below). We have found this to be not uncommon in other Florida locations as well, where more northern states are taking great advantages of the opportunity for solar installation and its accompanying utility costs benefits.



Historically, significant restrictions imposed by electric utilities has widespread hampered solar use, mainly by the requirement that all solar generation must be connected to the utility grid. Recent changes to the net metering process allows for the “banking” of excess kWh power as credits toward usage. Florida currently does not offer state-specific battery incentives[3], and solar batteries may not appear to be financially favorable to Florida homeowners, because of the consumer-friendly nature of net metering. Additionally, none of the utility companies in Florida offer a "virtual power plant[4]" program for homeowners. However, if a battery backup power source for a residence, all batteries above 3 kWh in size are eligible for the 30% federal tax credit.

Florida offers a Solar Sales Tax Exemption which exempts sales tax on solar equipment purchase, as well as a Solar Property Tax Exemption for homes using solar energy as a source of power, exempting the value of the solar system from property tax.

The Residential Clean Energy Credit, formerly known as the federal investment tax credit, can reduce solar installation costs by as much as 30 %, including all equipment, labor, permitting, and sales tax.

Solar Cooperatives

Community solar is a model of buying power that subscription to power produced at a large solar array or farm located at another location in the utility's service area. Innovative developments such as Babcock Ranch in Chalotte County are fully invested in the co-op model. In Task 9, we indicate the opportunities for solar farm installations in Cape Coral.

Currently, the State of Florida does not offer solar storage incentives. In individual cities such as Jacksonville, upfront rebates of $2,000 or more may be available for installation of solar-plus-storage facilities. Cape Coral's electricity is supplied by the Lee County Electric Cooperative (LCEC), which in turn buys power from Florida Power & Light (FPL). Upsets in fuel prices directly affect Cape Coral users, resulting in higher utility bills. While the City of Cape Coral is in the process of seeking alternative electric power options, we would recommend that a careful study of mass solar generation and storage be undertaken. Commonly occurring power disruptions from weather events can be partially alleviated for critical use facilities simply through adequate solar generation management.

[3] "Are There Energy Storage Incentives in Florida"; energysage.com
[4] Virtual Power Plan (VPP) -- networks of small energy-producing or storage devices, like solar panels and batteries, that are pooled together to serve the electricity grid. With their participants' approval, their energy can be tapped by utilities during times of high demand, or can be reserved for later use; https://www.reuters.com/business/sustainable-business/what-is-virtual-power-plant-2023-01-31/#:~:text=VPPs%20are%20networks%20of%20small,be%20reserved%20for%20later%20use.

Stormwater Infrastructure

Given Cape Coral's unique location and degree of canal development, a particular emphasis is needed relative to storms and weather events. Monitoring of street flooding can be achieved efficiently as described in the preceding Cape Coral FloodWatch section of this report but actual mitigation requires extensive measures that may not meet municipal budgetary capabilities in all areas of the City. As Cape Coral continues to grow in population and impervious surface area, stormwater management will also increase in its demands on City services.

Perhaps an alternative course of action can be achieved through Low Impact Development (LID). LID is a management approach that can reduce runoff and pollutant loadings as close to its source as possible. LID includes overall site design approaches and individual small-scale stormwater management practices. These practices promote use of natural systems for infiltration, evapotranspiration[5], and harvesting and reuse of rainwater. Some effective LID techniques are described as follows:

- **Rain Gardens**: filter stormwater runoff, promote evapotranspiration, and serve as visual amenities.
- **Bioretention:** filters stormwater runoff and can promote groundwater recharge and evapotranspiration.
    - Designed for the water quality storm and not for mitigation of flood storms.
    - Functions similar to a sand filter.
    - Requires adequate pre-treatment, such as a sediment forebay, deep sump catch basin, or grass filter strip.
- **Stormwater Gardens**: slow down and filter stormwater runoff, promote evapotranspiration, and serve as visual amenities.
- **Tree Box filters**: management practice or stormwater treatment system widely implemented along sidewalks, street curbs, and car parks.
- **Infiltration**: drywells and leaching catch basins provide groundwater recharge, some peak rate mitigation, and primary water quality treatment.
- **Permeable Pavement:** permeable paving materials reduce impervious cover, promote infiltration, and provide primary water quality treatment, groundwater recharge, and peak rate mitigation.

[5] Evapotranspiration: the sum of all processes by which water moves from the land surface to the atmosphere via evaporation and transpiration

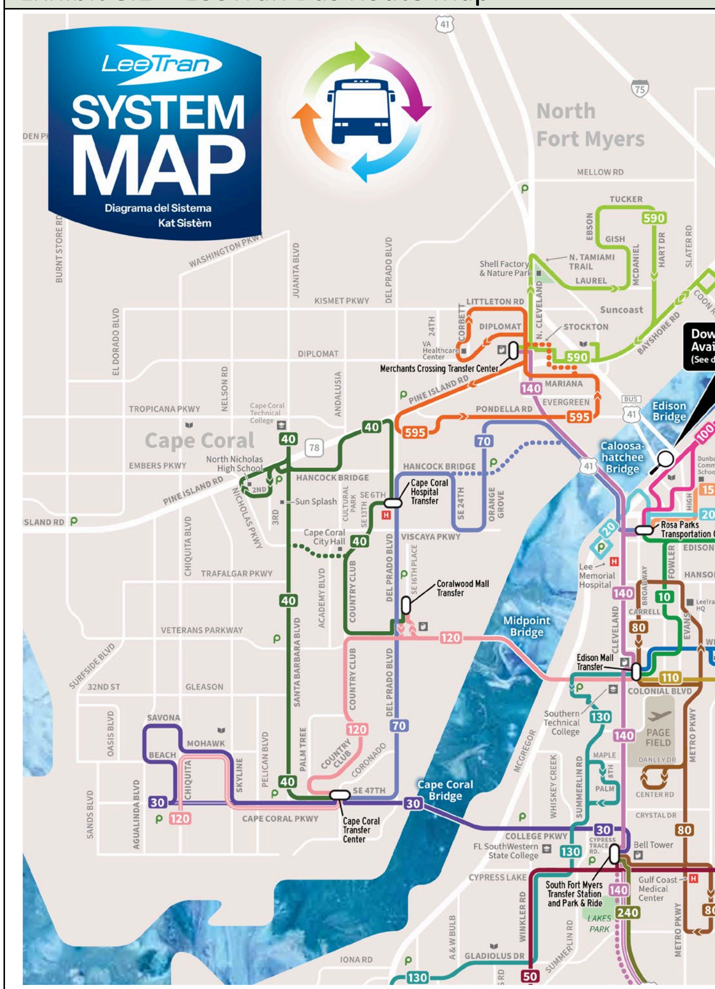
- **Green Streets:** provide pedestrian-friendly areas, natural shade, and areas for stormwater infiltration and rain gardens for water quality treatment.
- **Green Roofs:** reduce impervious cover and runoff volume, increase evapotranspiration, provide primary water quality treatment, and help reduce the peak rate and volume of stormwater for small storm events.
- **Rainwater Harvesting:** Harvested rainwater can be re-purposed for applications that do not require the use of potable water, such as toilet flushing and irrigation.
    - Rainwater harvesting reduces the volume of stormwater discharge and helps improve water quality.

8.c – Transportation

Cape Coral's unique location is also its drawback. This is a city with no seaports, airports, train stations, interstate highway access, or municipal bus system. In many ways, Cape Coral is just a suburban town. But, with a growing population already exceeding metropolises such Salt Lake City, transportation plays a crucial role in Cape Coral's future.

The Transportation Division's 2024 Cape Coral Multi Modal Transportation Master Plan is a comprehensive review of the City's need for transportation infrastructure improvements, especially important in a car-centric community as Cape Coral. New concepts such as micromobility and Mobility-on-Demand promise to offer residents the opportunity to transit the City in safer, greener, and more efficient means.

Exhibit 8.2 – LeeTran Bus Route Map



Lee Tran Bus Service

Bus service in Cape Coral is provided by LeeTran as the City does not operate its own bus system. The fixed route map of LeeTran service through Cape Coral is illustrated in Exhibit 8.2 (right). The map indicates the limited route offerings which are mainly oriented toward connections back to Fort Myers and North Fort Myers. There are four transfer stations in Cape Coral for bus connections:

- Cape Coral Transfer Station (downtown)
- Coralwood Mall Transfer
- Cape Coral Hospital Transfer
- Merchants Crossing Transfer

The bus lines serve the Southeast and Northeast Cape areas but the Southwest and Northwest neighborhoods are devoid of bus service. Future population growth is anticipated in these unserved areas and residents as well as seasonal visitors have no mass transit opportunities to utilize.

According to LeeTran, ridership and revenue per mile on the overall county system is decreasing as measured through from the FY13-14 through FY 20-21 periods.

MicroTransit

In most communities, microtransit is considered as an add-on to existing bus networks. According to a KPMG study, when properly designed and executed, flexible microtransit services can help eliminate transit deserts, create first- and last-mile connections to transportation hubs, and provide convenient paratransit — all while getting people out of privately driven vehicles[6].

Lee Tran's pioneering microstransit system called ULTRA On-Demand Transit (ULTRA) will soon be implemented in Cape Coral. Available daily in daylight hours, this LeeTran's mini-bus curb to curb service will allow riders to request a ride as needed and on a first-come, first-served basis within the designated service zones. With the ULTRA on demand transit app, riders will be able to schedule and track rides in real-time. This service differs from LeeTran's traditional fixed-route public transit service as riders no longer need to travel to a specific bus stop along a defined bus route at a particular time to catch a ride with public transit.

While ULTRA's roll-out in Lehigh Acres seems to be successful, there are those who feel that this new transit model may not fulfill the promises it offers. In a paper published by the Amalgamated Transit Union, many components of microstransit's costs, efficiency, scalability, reliability, and environmental impacts were evaluated. In several urban locations already using microtransit, the operating cost of a fixed route bus decreases with the addition of each new passenger but the cost to transport each additional microtransit passenger is roughly the same as the first. A fixed route bus can easily take on more riders as demand increases, but due to limited vehicle capacity and individualized routing, an increase in microtransit demand requires that more vehicles and operators be put on the road[7].

The study concludes with the following guidelines:

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[6] How Microtransit Can Help Solve Slowing Ridership; https://www.metro-magazine.com/10007224/how-microtransit-can-help-solve-slowing-ridership

[7] The False Promise of Microstransit; Amalgamated Transit Union; https://www.atu.org/pdfs/ATU_FalsePromiseofMicrotransit.pdf

- Investments should be made in the transit workforce to overcome the operator shortage and guarantee reliable service. Creating and sustaining good transit jobs is the best way to attract more workers to the industry. Good transit jobs benefit local communities, unlike microtransit companies that profit by misclassifying their workforce as independent contractors.

- Bus routes should be reconfigured to better serve passengers when and where they need to travel. The reality is that commuting patterns have fundamentally changed. Transit agencies must also make changes to improve existing services, such as reducing headways, building better bus shelters, and enhancing pedestrian connections to stops.

- Microtransit should not be used to replace or compete with existing fixed route and ADA paratransit services. It does not allow for the type of long-term, sustainable ridership growth that agencies need to recover from the pandemic. Limiting microtransit to small geographic areas can help prevent overlapping service.

Most important for Cape Coral is this last guideline:

- <u>Microtransit might be able to meet coverage goals in areas that cannot support regular service, such as low population exurban and rural communities, or to help people in those areas connect to fixed route systems at transit hubs. It could also serve as a tool to evaluate demand for expanded fixed route service hours or coverage.</u>

Unique Microtransit Potential

As described earlier, Cape Coral is a large city that has not invested in significant transportation infrastructure. The car-centric suburban nature of the community has served as the model until now, but the City is beginning to explore alternative systems to implement. While electric scooters, golf carts, bike-sharing and other wheel-based micromobility vehicles are becoming prevalent in major cities, we would like to propose a new mobility system tailored to Cape Coral: **On-demand water mobility.**

In many ways, Cape Coral is a city of firsts. First-ranked city in the world length of canal system; first city in the US to solely rely on reverse osmosis for water systems; and in 2017, the first-place award as a Digital City. Achievement cannot be devoid of risk, it is time for the City to again take a leadership position.

The implementation of water taxis has proven to be a successful mobility option in waterfront locations throughout the world. UBER has recently started a water service ferry system on the Thames River in London (Uber Boat) which is transforming the tourism industry and provides commuter opportunities previously unattainable. In New York City, a private ferry company (NY Waterways) serves over 18,000 passengers daily in 23 routes and 32 vessels.

Major US cities with water mobility transportation systems include:

- Alexandria, VA
- Annapolis, MD
- Baltimore, MD
- Boston, MA
- Charleston, SC
- Erie, PA
- Fort Lauderdale, FL
- Jacksonville, FL
- Long Beach, CA
- New York City
- New Orleans, LA
- Oklahoma City, OK
- Orlando, FL
- Pittsburgh, PA
- Portland, ME
- Quad Cities, IL/IA
- Sacramento, CA
- San Francisco, CA
- Seattle, WA
- Tampa, FL

Cape Coral's canal system, although a large and complex network of waterways, is hindered by the saltwater and freshwater makeup of the canals. Saltwater canals have accessibility to the Caloosahatchee River from various southern and eastern points or via the Matlacha Pass in the Northwest Cape. Fresh water canals are landlocked but interconnect large areas of interior Cape Coral.

Fort Myers Service

The most obvious use of water taxis would be a direct connection to the Fort Myers downtown, thereby providing some traffic relief across crowded bridges during rush hour. Cape Coral terminus locations at the ends of saltwater canals that are in proximity to major thoroughfares of Del Prado Blvd., Cape Coral Parkway, Veterans Parkway, or will serve the Bimini Basin should be considered. If parking areas at these ferry stops can be arranged, suitable property should be acquired. Alternatively, microtransit coordination between residential location and ferry terminus locations could offer a unique transportation linkage system.

With the expanse of water between Cape Coral and Fort Myers and the chances of wind and wave action that could affect light open boats, we would suggest a more substantial vessel be considered like the water taxi being utilized by New York City shown in the photograph right).

We would recommend that the City propose to conduct a feasibility study in Joint venture with the City of Fort Myers for a water taxi service across the Caloosahatchee River but one that is based in Cape Coral. Vessel maintenance, crew training, operations management, marketing, and tourism coordination should be led by a Cape Coral entity, possibly a public-private partnership. The service could provide future service to the beaches and islands. Private ferry service to Fort Myers Beach has been curtailed by the ongoing impact of Hurricane Ian.

Internal Water Taxi Service

Saltwater Canals

Cape Coral has a few major saltwater canals that could support water taxi service. The Rubican Canal from SE 47th Terrace northward to Viscaya Parkway could provide a scenic route that tourists and seasonal visitors renting private homes could enjoy. An evening ride in a comfortable open pontoon boat to downtown for dining or entertainment providing safe and driving-free options offer marketable opportunities to tourists and residents alike.

Similarly, the Spreader Canal water taxi line could serve larger areas of Southeast and Northwest Cape Coral. With the anticipated Chaquita Lock removal, Spreader Canal water use is expected to be greatly improved. Stops at Marina Village, the Westin, and Rotary Park could potentially create a special experience. We believe that a focus should be made to make the Bimini Basin a central point in the saltwater taxi network.

Freshwater Canals

The freshwater canals offer a different potential. Small electric vessels, possibly automonous, or as micromobility boat-sharing, could operate in the weather-protected canal system. The possibility of water taxi service to attractions such as SunSplash Water Park, Festival Park, or one the many golf courses should be considered as a tourism driver of high importance.

Additionally, the freshwater canal use by more boats would likely result in backwash and breakup of algae which has become a major problem in these canals.

Concepts for water taxi terminus development will be further explored in Task 9.

Autonomous Vessels

Canals are being re-imagined as water freight delivery systems. In Amsterdam, a new program of autonomous robot vessels entitled "Roboat" is beginning service. These vehicles will offer package delivery, waste collection, water quality testing, shoreline/bulkhead inspection, and more.

Insurance and liability issues remain, but an industry is sprouting around autonomous inland water vessels. In a 2023 paper by the WMU Journal of Maritime Affairs, the conclusions point out that the use of maritime autonomous vessels for the inland waterway (IWW) transport can revolutionize the current logistics supply chain and enable the shifting of the cargo transportation from the less efficient road and rail transport modes[8].

Advance robotics are commonplace in manufacturing, but not yet in transportation. By partnering with academia and looking forward, the City can become a leader in on-water autonomous mobility.

Air Service

There are two major airports within 45-minute commute of Cape Coral: Southwest Florida International Airport (RSW) in Fort Myers, and Punta Gorda Airport (PGD). Both facilities offer domestic flight services and private aviation opportunities. There are also two general aviation airports in the area, Page Field in Fort Myers, and Naples Airport. Although the City of Cape Coral is expected to grow to about 375,000 people, there is no direct need to establish a major airport since there are two nearby.

But, private and charter aviation are major business sectors, and availability of tie-down space for aircraft is at a premium. Page Field has a seven-year waiting list for new tie downs, and Naples is full. PGD has a waiting list for hangar rentals. Discussions with the Naples Airport operator indicated the need for a new general aviation airport in the area. Looking into the near future,

8 "Towards Autonomous Inland Waterway Vessels" ; WMU Journal of Maritime Affairs; https://link.springer.com/article/10.1007/s13437-023-00316-3

the development of vertical take-off and Landing (VTOL) air taxis will be prevalent in the US. Cities than can plan for a capture of this growth opportunity will be well positioned to outperform their competition. The City of Orlando is currently building a "vertiport" and will be ready for the implementation of this new industry.

According to Mordor Intelligence, the private jet charter business in the US is 2024 is estimated at $15.27 billion and is expected to grow to $29.30 billion by 2029[9]. General Aviation is all civil aviation activity other than that of commercial airlines; including business aviation, law enforcement flying, agricultural application, recreational aviation, air medical services, freight and package delivery, and more. General aviation airports provide a host of benefits to a community, including but not limited to the following:

- **Economic Multiplier Effect:** business aircraft travel brings marketing, professional, technical service and support staffers efficiently and quickly to their destination. These individuals, in turn, spend money in the local economy by staying in local hotels and eating at nearby restaurants, creating the economic "multiplier effect" in the area.

- **Competitive Advantage**: airports help keep existing employers in a community and attract new ones to a region because companies value the transportation and competitive business advantages offered by GA airports. Business developers look for ready access to air transportation when they make decisions on where to locate new operations and facilities.

- **Essential Access:** The ability to move people and goods quickly to and from airports has tangible benefits for everyone, not just air travelers. Overnight mail and package delivery, the transport of fresh fruits, vegetables, flowers and more to locations that would not otherwise have that access, all would not be possible without an airport nearby.

- **Lifesaving Services:** emergency medical services and air ambulance operators provide critically ill or injured people with timely access to specialized medical treatment through airlift operations, organ transports and more. Volunteer "Angel Flights" regularly transport sick patients to distant medical facilities for treatment.

- **Law Enforcement Services:** federal, state and local law enforcement agencies use hundreds of airplanes and helicopters to search, apprehend and transport criminals,

[9] Private Jet Charter Services Market Size and Share Analysis – Growth Trends and Forecasts (2024-2029); Mordor Intelligence; https://www.mordorintelligence.com/industry-reports/private-jet-charter-services-market

protect borders, and provide aerial security.

- **Agricultural Services:** Agricultural aircraft operators treat crops and sow seeds via aerial application.
- **Recreational Benefits:** airports play an important role in recreation by providing easy access to vacation and resort destinations, helping generate significant tourism income. Thousands of Americans fly their own airplanes for pleasure as well as business, positively impacting the local economy.

Developing a new airport using federal and state funding is not a quick process. In Florida, there are eight procedures to be followed:

#1. Airport Sponsor

To be eligible for public funding, every airport that is proposed to be part of Florida's public airport system must be sponsored by a grant-eligible public agency. A grant-eligible agency is a Florida unit of local government (i.e. a city or a county) or an authority as defined in Florida law. A proposed public airport may be newly constructed or may be an existing airport to be purchased by or conveyed to an eligible sponsor.

Ultimately, a proposed airport must be publicly owned and must be available for public use to be eligible for federal and state funding. State funding is dependent on annual legislative appropriations and eligibility does not guarantee state funding.

#2. Feasibility Study

A proposed airport must be included in the Florida Aviation System Plan (FASP) to be eligible for state funding and in the National Plan of Integrated Airport Systems (NPIAS) to be eligible for federal funding. The FASP is Florida's long-range needs plan for aviation facilities. Likewise, the NPIAS is the Federal Aviation Administration's (FAA's) long-range national needs plan for aviation facilities. Prior to entry into the FASP and/or the NPIAS, a feasibility study must be completed by the sponsor.

#3. FASP and NPIAS

Entry into the FASP and corresponding eligibility to receive state funds is approved by the Florida Department of Transportation Aviation & Spaceports Office. The decision is based on the results of a feasibility study, the capability and willingness of a proposed airport sponsor to assume long-term financial and legal commitments to establish and maintain a new airport, a recommendation from the appropriate regional CFASPP steering committee, and a recommendation from the appropriate department district office.

#4: Airport Site Selection and Preliminary Environmental Planning

A proposed new airport may require several environmental studies prior to facility design and construction. A key federal and state requirement is a site selection study which not only evaluates the aeronautical suitability of potential new airport sites, but also examines impacts of the proposed facility on the social and natural environments. The FAA and the U.S. Department of Environmental Protection are the approval agencies for the site selection and related studies. The Florida Department of Transportation Aviation & Spaceports Office must approve the proposed new airport site prior to capital funding.

#5: Facility Planning

Prior to capital funding, the airport sponsor must develop an airport master plan and an airport layout plan. The airport master plan develops detailed near-term and long-range facility needs, justification, cost estimates and construction schedules. The FAA must approve the airport layout plan for federal funding eligibility of the planned capital projects. The Florida Department of Transportation Aviation & Spaceports Office must approve both the airport master plan and the airport layout plan for state funding eligibility.

#6: Local Government Planning

Prior to proceeding with airport development, the airport sponsor must have the airport master plan incorporated into the local government comprehensive plan. The appropriate Metropolitan Planning Organization (MPO) may also review the local government comprehensive plan. Further, the MPO must include proposed airport development funding needs in its long- range transportation plan and its transportation improvement program. The Regional Planning Council may also need to review the proposed airport and consider regional impact.

#7: Environmental Impact Analysis

Most new airport proposals will be subject to a detailed environmental impact analysis based on development specified in the airport master plan and the airport layout plan. The environmental analysis will result in any environmental impact statement that will specify the acceptability of the proposed projects and any required environmental mitigations. The FM conducts the environmental analysis and issues a record of decision upon completion of the study.

In addition to a favorable FM record of decision, an airport sponsor must obtain all construction permits required by the regional water management district, the Army Corps of Engineers, the Florida Department of Environmental Protection, and the local government(s).

#8: Airport Construction

Finally, engineering design and construction of airport development projects described in the airport master plan and layout plan are accomplished according to the airport master plan schedule, but within the funding constraints of the sponsor, state, and federal budgets.

Typically, it requires more than five years to complete these eight steps for a simple general aviation airport. More complex airport configurations or environmentally sensitive sites require more time for development.

We will explore some financial considerations for a "Cape Coral Executive Airport" in Task 9.

8.d – Task 8 Progress Report/video conference

We conducted a video conference with the Project Review Committee on July 17, 2024. Work product to date was discussed and the materials covered were previously uploaded to the website.

Economic Development Strategic Plan - RCM2342AS

Task 9 Report

prepared for:

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September 30, 2024

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Task 9: Land Use and Real Estate Analysis

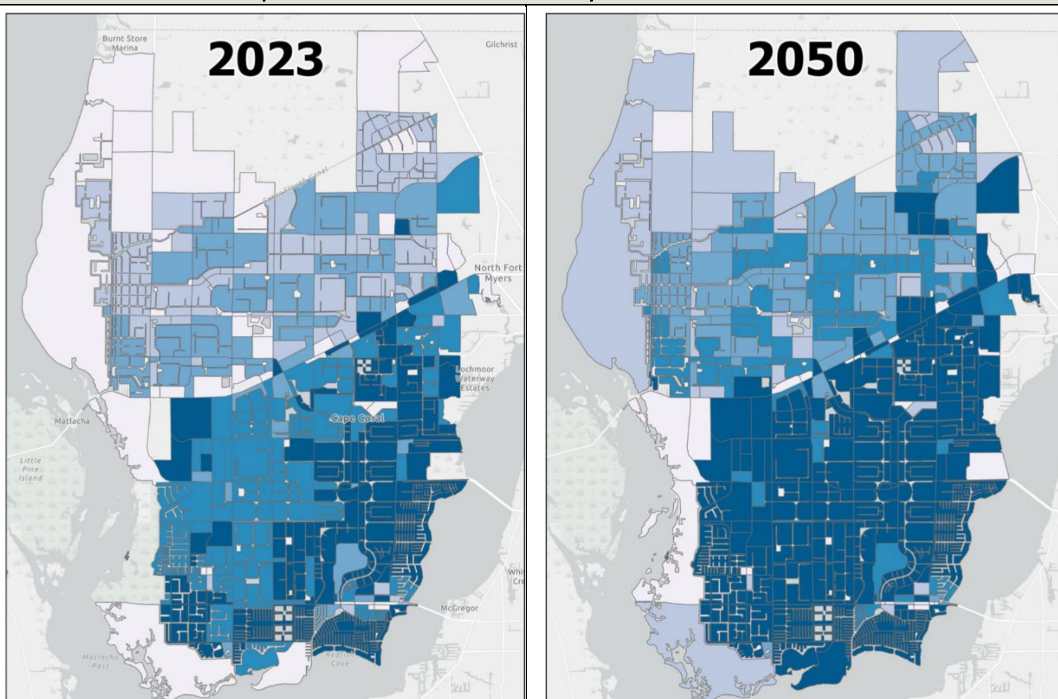
9.a – City-Wide Analysis

Growth Forecasts

Metro Forecasting Models' Interactive Growth Model (IGM) has analyzed Cape Coral's growth and predicts that the population will grow by **100,000** persons in the next 25 years. At final build-out, the City should reach a population of **375,000** people, exceeding the current populations of Cleveland, Honolulu, or New Orleans.

While continued infill of platted lots south of Pine Island Road will continue, the major growth will occur in the northern sections, as show in the IGM maps in Exhibit 9.1 (below):

Exhibit 9.1 – IGM Cape Coral Build-Out Density – 2023 versus 2050



Nonresidential Building Stock

The City of Cape Coral's **119.4** square mile area is catalogued by **127,830** individual property records totaling **57,213 acres** not including canals and roadways. Utilizing Lee County's Property Appraiser records, there are total of **1,575** non-residential improved properties in **38** categories of building use (Department of Revenue Code – DOR). The tax database is the most reliable source of evaluating existing buildings on a city-wide scale.

As shown in the Exhibit 9.2 below, there are five major groups of DOR categories:

- Commercial (22 uses)
- Industrial (4 uses)
- Institutional (5 uses)
- Governmental (6 uses)
- Miscellaneous (1 use)

In total, the 1,575 buildings account for **21,664,775** square feet of floor space. The building stock is largely older in nature, with a **31.0** years weighted average. In the past ten years, **4,367,796** sf of new space has between added to the inventory, or a gain of **20.2** percent. It should be noted that inventory growth has only been witnessed in **half** (19) of the 38 categories.

Exhibit 9.2 – Non-Residential Building Stock						
DOR	Description	# of Bldgs.	Inventory Total sf	Added last 10 yrs sf	Added last 10 yrs %	Wghtd. avg. age yrs.
Commercial						
11	Stores, one story	149	1,876,346	1,244,050	66.3%	29.7
12	Commercial, mixed use	10	688,126	0	0.0%	18.1
13	Department store	2	231,261	0	0.0%	18.0
14	Supermarkets	56	494,894	191,978	38.8%	13.3
15	Regional shopping center	**1**	254,294	0	0.0%	38.0
16	Community shopping center	158	3,104,627	976,568	31.5%	34.2
17	Office, one story	216	913,131	108,106	11.8%	38.8
18	Office, multi-story	52	519,204	0	0.0%	32.8
19	Professional building	109	729,185	253,765	34.8%	29.4
20	Airports, terminals, piers	7	84,215	0	0.0%	17.0
21	Restaurants, cafeterias	63	293,137	9,002	3.1%	35.2
22	Drive-in restaurants	38	109,670	35,761	32.6%	19.9
23	Financial institutions	39	168,578	10,835	6.4%	28.4

25	Laundry/Laundromat	2	6,715	0	0.0%	58.6
26	Service stations	17	52,967	18,371	34.7%	18.1
27	Auto sales, repair, etc	83	472,850	174,711	36.9%	39.6
32	Enclosed theater/auditorium	4	57,892	0	0.0%	43.1
33	Night clubs, lounges, bars	9	45,315	0	0.0%	52.5
34	Bowling alleys, rinks, arenas	4	90,069	34,190	38.0%	28.3
35	Tourist attractions	3	19,293	196	1.0%	25.6
38	Golf course, driving range	2	57,048	0	0.0%	54.1
39	Hotels, motels	8	200,963	58,339	29.0%	26.9
Commercial subtotal		**1,032**	**10,469,780**	**3,115,872**	**29.8%**	**30.9**
Industrial						
41	Light manufacturing	30	438,960	62,219	14.2%	37.0
45	Cannery, brewery, winery	1	5,771	0	0.0%	40.0
47	Mineral processing	1	1,664	0	0.0%	59.0
48	Warehousing, distribution terminals	300	4,524,108	899,690	19.9%	26.9
Industrial subtotal		**332**	**4,970,503**	**961,909**	**19.4%**	**27.8**
Institutional						
71	Churches, Temples	68	913,227	143,149	15.7%	40.5
72	Private schools & colleges	7	132,990	0	0.0%	27.2
73	Privately owned hospitals	2	89,535	46,519	52.0%	12.9
76	Mortuary, Cemetary, Creamatorium	1	8,439	0	0.0%	57.0
77	Clubs, Lodges, Union Halls	9	82,946	0	0.0%	44.2
Institutional subtotal		**87**	**1,227,137**	**189,668**	**15.5%**	**37.4**
Governmental						
83	Public County schools	16	2,824,329	0	0.0%	32.8
85	Hospitals	2	632,409	0	0.0%	46.7
86	Lee County - Other	4	102,487	0	0.0%	26.5
87	State of Florida - Other	1	1,500	0	0.0%	22.0
88	US Gov't - Other	4	281,343	48,126	17.1%	16.2
89	City of Cape Coral - Other	81	1,122,576	52,221	4.7%	29.1
Governmental subtotal		**108**	**4,964,644**	**100,347**	**2.0%**	**32.7**
Miscellaneous						
91	Utility	16	32,211	0	0.0%	39.8
Miscellaneous subtotal		**16**	**32,211**	**0**	**0**	**39.8**
Grand Total		**1,575**	**21,664,275**	**4,367,796**	**20.2%**	**31.0**

Commercial

The Commercial sector is segmented into Financial, Food Service, Lodging, Mixed Use, Offices, Recreation, Retail, and Service categories. In total, there are **1,032** buildings containing

10,469,780 sf, with an average age of commercial structures of **31.5** years. In the past ten years, **1,053,921** sf of inventory has been added, or a gain of **10.1** percent. Exhibit 9.2 (at the end of this section) illustrates the location of new commercial structures in the three major sectors of offices, retail and food services.

Activity is focused along the Pine Island Rd. corridor as well as along Veterans Pkwy., Del Prado Blvd. S., Santa Barbara Blvd., Skyline Drive, Viscaya Pkwy., and Cape Coral Pkwy. While the downtown does show some activity, more development in the business core should be targeted. However, the northwest Cape is devoid of new commercial construction which will be certainly needed in the future as population growth to the north and west is anticipated. Exhibit 9.3 (below) illustrates the location of new commercial structures in the three major sectors of offices, retail and food services.

Financial

There are **39** financial buildings totaling **168,578** sf with an average age of **28.4** yrs. In the past 10 years, only **10,835** sf or **6.4%** has been added to the inventory in this category. New construction has mainly occurred in downtown or on Del Prado Blvd S. The average financial use building is **4,323** sf.

Food Service

There are **101** food service buildings totaling **402,807** sf with an average age of **31.0** yrs. Two sub-categories are included in this sector: Restaurants, cafeterias; and, Drive-in restaurants.

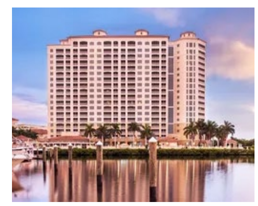
- Restaurants, cafeterias: **63** buildings totaling **293,137** sf; average age of **35.2** years; average size of **4,653** sf; new construction of **9,002** sf or **3.1%** added in the last 10 years; activity occurring along Pine Island Rd.

- Drive-in restaurants: **38** buildings totaling **109,670** sf; average age of **19.9** years; average size of **2,886** sf; new construction of **35,761** sf or **32.6%** added in the last 10 years; most activity occurring along Pine Island Rd., Veterans Pkwy., Del Prado Blvd. S., and Cape Coral Pkwy.

Lodging

There are **8** hotels and motel buildings totaling **200,963** sf with an average age of **26.9** yrs. In the past 10 years, **58,339** sf or **29.0%** has been added to the inventory, making this an fairly active element. New construction has primarily occurred on Pine Island Rd. The average food service use building is **25,120** sf.

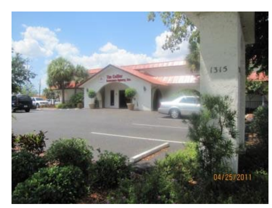
Mixed-Use



There are 1**0** mixed-use buildings totaling **688,126** sf with an average age of **18.1** yrs. In the past 10 years**,** there **0%** has been added to the inventory, but within Cape Coral, there are many mixed use properties currently under development. The average mixed-use use building is **68,813** sf, but this figure is skewed by the major component in the group, the Westin Hotel property, which accounts for **91**% of the category.

Offices

There are **377** office buildings totaling **2,161,250** sf with an average age of **34.2** yrs. Three sub-categories are included in this sector: Single story; Multi-story; and Professional.



- Single-story: **216** buildings totaling **913,131** sf; average age of **38.8** years; average size of **4,227** sf; new construction of **108,106** sf or **11.8%** added in the last 10 years; most activity occurring along Skyline Drive, Chiquita Blvd. S, and Pine Island Rd.

- Multi-Story: **52** buildings totaling **519,204** sf; average age of **32.8** years; average size of **9,985** sf; no new construction added in the last 10 years; most existing activity occurring along Cape Coral Parkway and Del Prado Blvd. S.

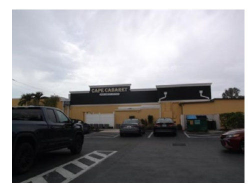
- Professional: **109** buildings totaling **729,185** sf; average age of **29.4** years; average size of **6,690** sf; new construction of **253,765** sf or **34.8%** added in the last 10 years; most activity occurring along Del Prado Blvd. S., Viscaya Pkwy., and in the vicinity of the Cape Coral Hospital.

Recreation

There are **22** buildings in this group totaling **269,617** sf with an average age of **40.8** yrs. Five sub-categories occur in this sector: Bowling alleys, rinks, arenas; Enclosed theater/auditorium; Golf course, driving range; Night clubs, lounges, bars; and, Tourist attractions.

- Bowling alleys, rinks, arenas: **4** buildings totaling **90,069** sf; average age of **28.3** years; average size of **22,517** sf; new construction of **34,190** sf or **38.0%** added in the last 10 years; most activity occurring along Pine Island Rd.

- Enclosed theater/auditorium: **4** buildings totaling **57,892** sf; average age of **43.1** years; average size of **14,473** sf; no new construction added in the last 10 years; most existing activity occurring along Cape Coral Pkwy. and Viscaya Pkwy.



- Golf course, driving range: **2** buildings totaling **57,048** sf; average age of **54.1** years; average size of **28,524** sf; no new construction added in the last 10 years; most activity occurring in the area of Nicholas Pkwy. And Veterans Pkwy.

- Night clubs, lounges, bars: **9** buildings totaling **45,315** sf; average age of **52.5** years; average size of **5,035** sf; no new construction added in the last 10 years; most existing activity occurring along Cape Coral Pkwy, Del Prado Blvd. S., and Santa Barbara Blvd.

- Tourist attractions: **3** buildings totaling **19,293** sf; average age of **25.6** years; average size of **6,431** sf; **196** sf or **1.0%** added in the last 10 years; most existing activity occurring along Pine Island Rd.

Retail

There are **449** buildings in this group totaling **6,434,272** sf with an average age of **31.3** yrs. Six sub-categories are in this sector: Auto sales, repair, etc.; Community shopping center; Department store; Regional shopping center; Stores, one story; and, Supermarkets.

- Auto sales, repair, etc.; **83** buildings totaling **472,850** sf; average age of **34.2** years; average size of **5,697** sf; new construction of **174,711** sf or **39.6%** added in the last 10 years; most activity occurring along Pine Island Rd. and Skyline Blvd.

- Community shopping center: **158** buildings totaling **3,104,627** sf; average age of **34.2** years; average size of **19,650** sf; new construction of **976,568** sf or **31.5%** added in the last 10 years; most activity occurring along Pine Island Rd., Santa Barbara Blvd., and Cape Coral Pkwy.

- Department store: **2** buildings totaling **231,261** sf; average age of **18.0** years; average size of **115,631** sf; no new construction added in the last 10 years; most existing activity occurring along Pine Island Rd. and Veterans Pkwy.

- Regional shopping center: **1** building totaling **254,294** sf; age of **38.0** years; no new construction added in the last 10 years; existing activity occurring along Del Prado Blvd. S.

- Stores, one story: **149** buildings totaling **1,876,346** sf; average age of **29.7** years; average size of **12,593** sf; new construction of **1,244,050** sf or **66.3%** added in the last 10 years; most new activity occurring along Del Prado Blvd. S., Veterans Pkwy., Pine Island Rd., and Cape Coral Pkwy.

- Supermarkets: **56** buildings totaling **494,894** sf; average age of **13.3** years; average size of **8,837** sf; new construction of **191,978 sf** or **38.8%** added in the last 10 years; most new activity occurring along Pine Island Rd., Veterans Pkwy, Del Prado Blvd. S. and Cape Coral Pkwy.

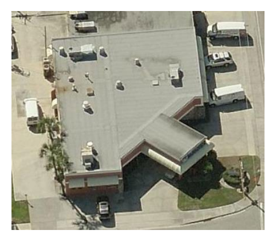
Service

There are **26** buildings in this group totaling **143,897** sf with an average age of **19.3** yrs. Three sub-categories are included in this sector: Airports, terminals, piers.; Service stations; Department store; and, Laundry/Laundromat.

- Airports, terminals, piers: **7** buildings totaling **84,215** sf; average age of **17.0** years; average size of **12,031** sf; no new construction added in the last 10 years; most existing waterfront activity occurring in the vicinity of Cape Coral Pkwy., Veterans Pkwy; and El Dorado Pkwy.

- Service stations: **17** buildings totaling **52,967** sf; average age of **18.1** years; average size of **3,116** sf; new construction of **18,371 sf** or **34.7%** added in the last 10 years; most new activity occurring along Cape Coral Pkwy., Santa Barbara Blvd., and Skyline Blvd.

- Laundry/Laundromat: **2** buildings totaling **6,715** sf; average age of **58.6** years; average size of **3,358** sf; no new construction added in the last 10 years; most existing activity occurring in along Cape Coral Pkwy.



Commercial Summary

The Commercial sector is a largely older building stock that has not witnessed dynamic growth in Cape Coral. With an inventory gain of only **10.1%** in the past ten years, the opportunity to fill space needs at present for the targeted industry employment will be problematic without more inventory additions. The three key areas of office, retail and food services are key to this pathway.

Office Space

For example, in the office sector, targeted industry employment in two key areas suggests the need for nearly **1.8 million** sf of new office space:

Target Industry Demand	Empl.	SF/need /Position	Total sf
Business & Financial services	3,675	200	735,000
Healthcare & Life Sciences	3,378	300	1,013,400
Total new office space demand			**1,748,400**

Commercial real estate data indicates that the office market in Cape Coral is very tight. Cushman & Wakefield's 2nd Quarter 2024[1] shows an office inventory of about **1.63 million** sf with a vacancy rate of only **1.1%** and no new office projects under construction. Current net absorption is a positive 3,000 sf indicating further tightening of the market.

While start-ups and incubating companies can occupy older buildings while they scale, the need for modern, energy-efficient structures, especially if LEED certified[2], is a priority for most corporate users. From both a data and observational viewpoint, the City of Cape Coral is clearly lacking in larger business operations. To attract corporations to a community, both the labor force and the real estate potential must be weighed. Given Cape Coral's out-commuting workforce figures and the population growth expectations, the labor force component can be considered as a positive driver. But the older, and mostly smaller-sized building stock is a deterrent at present. What is needed to be successful is the development of a base on new multi-story office buildings, preferably in a business-park setting with floorplates of about 25,000 sf so that companies in the 100–200-person size can be actively pursued. Attracting larger companies to Cape Coral must be considered as a priority to help maintain a sustainable economic growth trajectory.

Retail Space

With an inventory of just over **6.4 million** sf of space, the retail sector is the largest component of the commercial category (**61%**). Retail buildings are also older in nature at **31.3** years, and average size of **14,330** sf. At **3.1 million** sf, the Community Shopping Center (strip center) is the most prevalent use type, followed by One-story Stores (**1.9 million** sf). Auto sales and Supermarkets are a more distant third and fourth place, followed then by Regional Shopping Center and

[1] Cushman & Wakefield SW Florida MarketBeats, Office Market; 2nd Q 2024; https://cpswfl.com/wp-content/uploads/2024/07/Fort-Myers_Naples_Americas_Alliance_MarketBeat_Office_Q22024.pdf
[2] LEED (Leadership in Energy and Environmental Design) is the world's most widely used green building rating system. LEED certification provides a framework for healthy, highly efficient, and cost-saving green buildings, which offer environmental, social and governance benefits. LEED certification is a globally recognized symbol of sustainability achievement, and it is backed by an entire industry of committed organizations and individuals paving the way for market transformation.

Department Stores. With an expected employment gain of about **1,430** jobs in the Consumer Products and Services targeted cluster, and utilizing an industry rule of thumb of about **450 sf** per employee, we should expect to see at least **643,000** sf of new retail space added to the market in the next five years. By population growth comparison, the current retail inventory ratio is **29.7** sf per person, using the 2022 population (216,984 persons). With a projected growth of 375,000 by 2050, that would mean a demand increase of nearly **4.7 million** sf of retail space.

The IGM report is somewhat different in analysis. Their report indicates a retail inventory of **7.7 million** sf and a ratio of **36** sf per person increasing to **39** sf per person by 2050. E-commerce is radically affecting how we shop and its effect on brick-and-mortar investments is clearly evident nationally. It is only reasonable to assume, therefore, that floor space metric will <u>decrease</u> in the future, not increase as per IGM's assumptions. But to some degree, retail space will be increasing at a proportional relationship to population albeit at a pace yet to be calculated.

According to the Colliers 4th Quarter 2023 Retail report[3], Cape Coral/N. Fort Myers contains **8.8 million** sf of retail space which is **3.4%** vacant. Net absorption is a negative **13,900** sf indicating that there is more supply than demand. New construction is quoted as **80,000 sf** but several large housing and mixed-use projects currently being developed in Cape Coral will provide hundreds of thousands of square feet of new retail space in the coming years.

Cape Coral is a large community becoming a mid-sized city but does not have a major indoor shopping mall. Likely as a result of this absence, there are many retail chains that have no presence in the City. Many of these retailers prefer space location in covered malls as opposed to free-standing facilities. However, in many malls around the country, pad sites or dedicated building extensions house chain facilities are becoming increasing popular in that they permit easier access by shoppers from their vehicles. Chains such as Barnes & Noble, Starbucks, and Panera Bread are typical of this type of development trend.

Examining how new patterns in retail are evolving will be necessary for any community to be successful in the coming years. A newer retail shift that is gaining traction in how retailers think about offering entertaining events -- "Retailtainment". This approach acknowledges the changing consumer expectations, where shopping is not just a transaction but a desirable activity in its own right. Cape Coral does not need to repeat the undue mistakes made by other communities such as having to fill acres of empty regional mall space but can chart new directions by being aware of the needs of retailers in the newer age.

[3] Colliers SW Florida Retail Q3 2024; file:///C:/Users/bmhoc/Downloads/Southwest%20FL%20Retail%20Market%20Report%20%2023Q4%20(1).pdf

We would recommend the use of “pop-up” retail events, retail fairs, and other venues to encourage chain retailers to examine Cape Coral’s large buying public and recognize the revenue possibilities created by fulfilling the unmet desires of this growing population. Utilizing unique local elements such as the canals or the natural preserves can provide the backdrop to promote recreational or clothing products or services that will ultimately lead to more retail development. While new mall development may or may not occur, the “facelifting” of existing strip centers and outmoded one-story shops with creative graphics and displays indicative of the tropical locale should be encouraged. Wherever possible, the integration of entertainment or dining with retail should be promoted a way of enhancing the retail experience.

Food Service Space

Food service facilities have a combined area of just over **400,000** sf. The average age of food service building is **31.0 years**, and the average is just under **4,000** sf. For this category, the age or average size is not as important as the location.

From Exhibit 9.2, it is evident that new food service developments occur along major arteries, similar to retail. But a unique feature of dining is that is generally neighborhood centric, serving as gathering places for locals. Cape Coral’s many neighborhoods are more defined by vehicular access rather than walking. As such, the concentration of restaurants within a few minutes’ walk does not generally occur other than outside of the CRA downtown.

By our analysis, Cape Coral can develop a “foodie” industry by more direct promotion of restaurants, specialty food retail, cooking schools, mobile food service, and catering. A critical feature of this effort will be the establishment of neighbor dining opportunities. This can be achieved both by in-person food service or by delivery-to-home options (Doordash, GrubHub; UberEats, etc.). In this regard, use of empty facilities as new food service opportunities must be considered as viable building stock potentials.

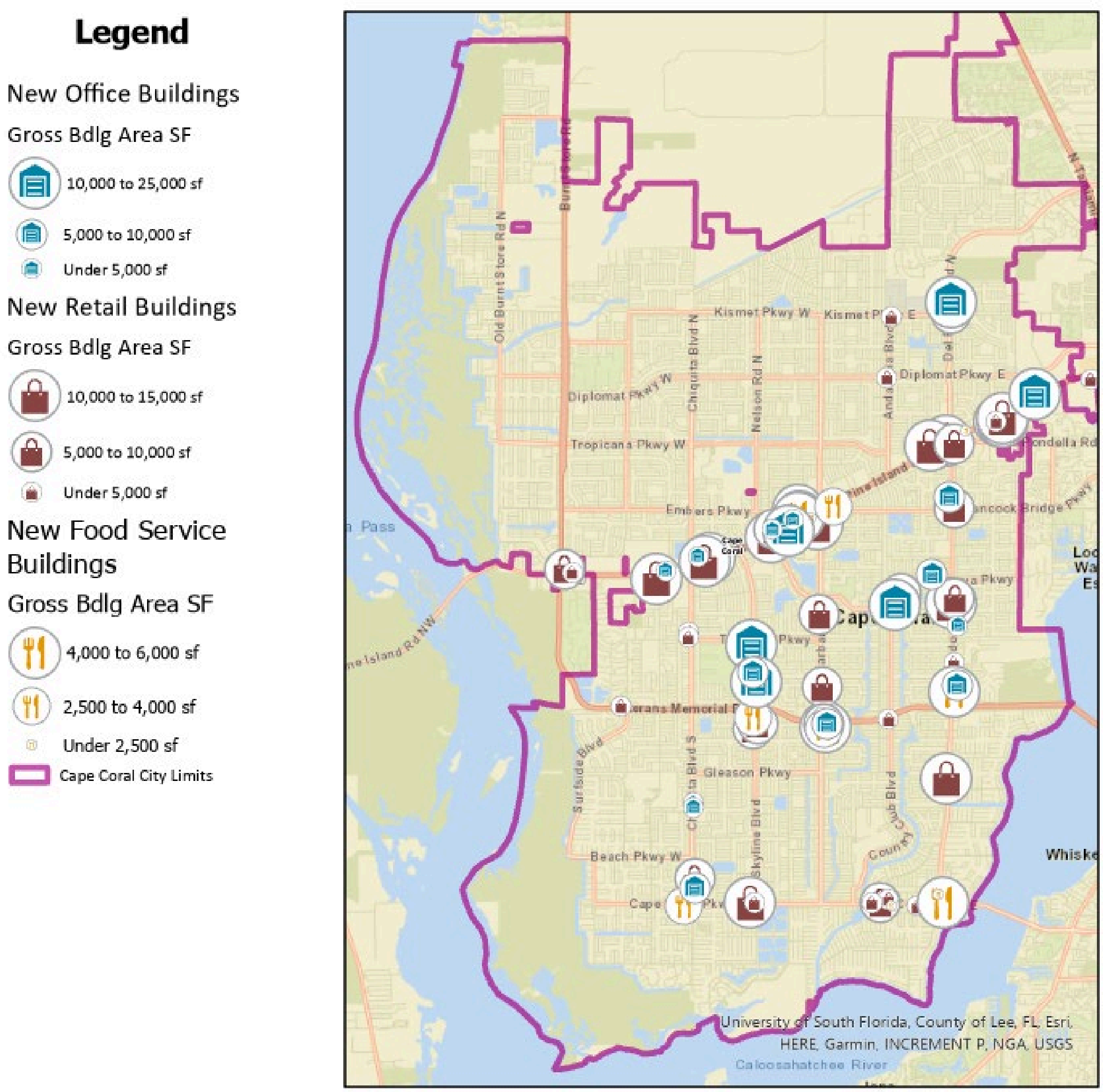
During the Covid epidemic, Americans participated in unique dining experiences, such as closed and tented streets for outdoor serving. While much of this has disappeared as a return to normal conditions, the concept of outdoor permanent dining is a real possibility for temperate climates.

As an initial solution, the permitted use of food trucks in parks, other underutilized or vacant properties, or temporarily closed streets should be considered. This lower-impact approach in key locations can help to build awareness for the benefits of neighborhood dining with ethnic variety and unique preparation approaches (fusion) can help to instill a new direction for Cape Coral.

In a more permanent approach, new "restaurant rows" could be established as dock-n-dines along the canals, especially the freshwater inland waterways. An island tiki hut in Lake Kennedy near Sun Splash Park, or at the foot of Saratoga Lake, Lake Meade, any of the other plentiful lake locations could provide the tourism/dining connection that Cape Coral is lacking. The concept is that although the many 4-corner intersections of the major roadways are already saturated with retail strips or have residential uses directly abutting streets without progressive zoning opportunities for restaurants and smaller shops common to town centers, the canals represent opportunities to partly help correct the problem. The footprint for a new commercial activity center can be both dry and wet simultaneously, with land side connections supporting new "island" developments directly within neighborhoods. Private boat use or light water taxi services can accommodate patrons.

The key is creative planning that will allow for zoning changes to occur. Food service is often the first venture for neighborhood revitalization or change due to the intrinsic nature of dining and impromptu gathering. The "buzz" that occurs when a new restaurant opens is unlike that of any other commercial venture. Adding retail or services to an established restaurant area is more easily accomplished once the audience is already present.

Exhibit 9.3 – New Commercial Building in Office, Retail and Food Service Sectors by Location



Industrial

The Industrial sector is segmented into: Light manufacturing; Cannery, brewery, winery; Mineral processing; and, Warehousing, distribution terminals categories. In total, there are **332** buildings containing **4,970,503** sf, with an average age of commercial structures of **27.8** years. In the past ten years, **961,909** sf of inventory has been added, or a gain of **19.4** percent. Exhibit 9.3 (at the end of this section) illustrates the location of new industrial structures in the Light industrial and Warehousing sectors. Existing industrial development is mainly centers in the three industrial park areas:

- The main Cape Coral industrial zone at Del Prado Blvd. S. and Viscaya Pkwy./SE 9th St.
- The second industrial area along Pondella Rd. and NE 19th Pl.
- North Cape Industrial Park along Andalusia Blvd. and Kismet Pkwy.

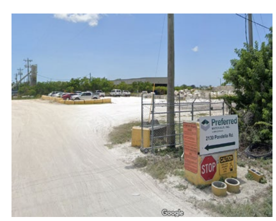
Light Industrial

There are **32** buildings in this group totaling **446,395** sf with an average age of **37.1** yrs. Three sub-categories are in this sector: Light manufacturing.; Cannery, brewery, winery; and, Mineral processing.

- Light manufacturing: **30** buildings totaling **438,960** sf; average age of **37.0** years; average size of **14,632** sf; new construction of **62,219** sf or **14.2%** added in the last 10 years; most activity occurring along Pine Island Rd. and Skyline Blvd.

- Cannery, brewery, winery: **1** building totaling **5,771** sf; age of **40.0** years; no new construction added in the last 10 years; location on SW 3rd Pl.

- Mineral processing: **1** building totaling **1,664** sf; age of **59.0** years; no new construction added in the last 10 years; location on Pondella Rd.



Warehousing, distribution terminals

There are **300** warehouses and distribution terminals totaling **4,524,108** sf with an average age of **26.9** yrs. In the past 10 years, **899,690** sf or **19.9%** has been added to the inventory, making this a fairly active element. The average warehouse building is **15,080** sf. New warehousing activity is focused along the Pine Island Rd. corridor as well the three industrial areas. Of the new warehouses in the last 10 years, **542,545** sf or **60%** represented self-storage projects.

Industrial Summary

The Industrial sector is a largely older building stock that is seeing new life primarily in the development of self-storage facilities. There is limited flex building construction or larger distribution-type warehouses with high cube volume being erected. Especially missing is refrigerated or freezer warehouse space for food storge.

According to commercial realtors, Cape Coral has an industrial inventory of **3.26 million** sf that is currently **1.9%** vacant[4]. Net absorption is a negative **48,000** sf, implying that supply is outpacing demand. The report indicates that **38,000** sf of industrial space is under construction.

Excluding newer self-storage projects, the industrial building stock in Cape Coral does not meet the present market need. Worldmetrics.org, a leading provider of market insight states that the average size of a warehouse in the United States has grown by **143%** since 2000, and in 2020, the average warehouse was **184,693** square feet. Through analysis wholesale employment with the Targeted Industries, at least **735** new positions will be required in warehousing industries across all sectors. Utilizing the figure of **750** sf of warehouse space per wholesale employee, the need for warehouse space in Cape Coral will be **551,000** sf in the next five years. Wifitalents.com indicates that there is **39** sf of warehouse space per person in the United States[5]. In Cape Coral, that figure is currently **21** sf per person, likely indicating that the City is under-warehoused. But, even using this metric for the 2050 population growth, Cape Coral would have as shortfall of **3.3 million** sf of warehousing space.

[4] Cushman & Wakefield, SW Florida MarketBeats; Industrial Market Q2-2024; https://cpswfl.com/wp-content/uploads/2024/07/FortMyers_Naples_Americas_Alliance_MarketBeat_Industrial_Q22024.pdf
[5] Warehouse Industry Statistics: Growth Projections, Market Trends, and Workforce Info; https://wifitalents.com/statistic/warehouse-industry/#:~:text=%22In%202020%2C%20the%20warehouse%20space,US%20was%2039%20square%20feet.%22

The IGM report has pointed out that the City is quickly running out of industrial land, and we concur. It is vital that larger commercial tracts under control of the City be held for this purpose. These would include the N. Prado Commerce Park and the Burnt Store 300 parcels.

For startups that need light manufacturing or warehouse or space, the older and smaller footprints of vacant structures may be a workable solution. However, use of these buildings would be more suitable as incubators or for intermediate occupancies. Increasingly, however, companies around the US rely on flex industrial buildings as the preferred model for scaling business operations due to the configuration and footprint modifications allowable by this type of structure. Wherever possible, industrial developers in Cape Coral should be encouraged to add this building type to the City's industrial inventory.

Exhibit 9.4 – New Industrial Building in Light Industrial and Warehousing Sectors by Location

Institutional

The Institutional sector is segmented into: Churches, Temples; Private schools & colleges; Privately owned hospitals; Mortuary, Cemetery, Crematorium; and, Clubs, Lodges, Union Halls. In total, there are **87** buildings containing **1,227,137** sf, with an average age of institutional structures of **38.2** years. In the past ten years, **189,668** sf of inventory has been added, or a gain of **15.5** percent. Exhibit 9.4 (at the end of this section) illustrates the location of existing intuitional construction in the Churches/Temples, Private Schools, Private Hospitals, and Clubs/Lodges subgroups which represent most of this category. Activity has been mainly focused in the southeast quadrant of the City, south of Pine Island Road, likely following the patterns of historical housing development. Northwest Cape is essentially devoid of institutional activity which will be certainly needed in the future as population growth to the north and west is anticipated.

Churches, Temples

There are **68** churches and temples totaling **913,227** sf with an average age of **40.5** yrs. In the past 10 years, **143,149** sf or **15.7%** has been added to the inventory, making this a somewhat active element. New construction has primarily occurred on Del Prado Blvd. N. and Cape Coral Pkwy. The average size for a church or temple is **13,430** sf.

Private Schools & Colleges

There are **7** private schools & colleges totaling **132,990** sf with an average age of **27.2** yrs. In the past 10 years, no new space has been added to the inventory. Existing activity has primarily occurred along Santa Barbara Blvd., Pine Island Rd., and Diplomat Pkwy. E. The average size for a private schools or college is **18,999** sf.

Privately Owned Hospitals

There are **2** privately owned hospitals totaling **89,535** sf with an average age of **12.9** yrs. In the past 10 years, **46,519** sf or **52.0%** has been added to the inventory, making this an active element. New activity has primarily occurred in the vicinity of Pine Island Rd. The average size for a privately owned hospital is **44,768** sf.

Mortuary, Cemetery, Crematorium

There is **1** mortuary, cemetery, crematorium totaling **8,439** sf with an age of **57.0** yrs. In the past 10 years, no new space has been added to the inventory, making this an inactive element. Existing activity has occurred on Chiquita Blvd. S. (Note: Other facilities may exist in Cape Coral under leaseholds not covered by tax assessor data).

Clubs, Lodges, Union Halls

There are **9** clubs, lodges, union halls totaling **82,946** sf with an age of **44.2** yrs. In the past 10 years, no new space has been added to the inventory, making this an inactive element. Existing activity has occurred on primarily along Cape Coral Pkwy. and Pine Island Rd. The average size for a club, lodge, or union halls is **9,216** sf.

Institutional Summary

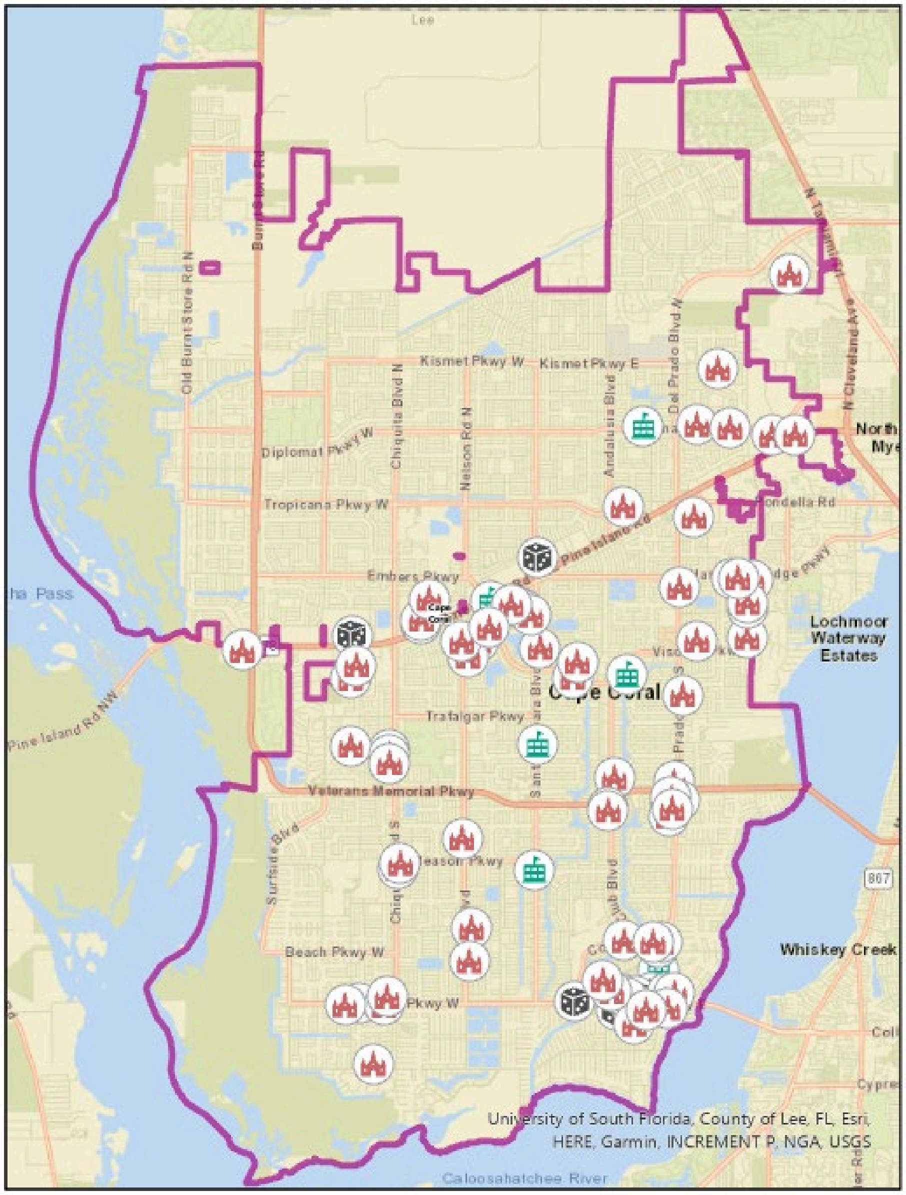
While new development activity in this sector is marginal, the need for institutional investment is one that parallels population growth. As Cape Coral attracts a larger and more diverse resident base, the need for multiethnic religious, educational, and social facilities will also increase. Specialty healthcare is a priority and the growing national shortage of nurses and healthcare workers is placing much too great a financial strain on large public hospitals. Cape Coral has a few urgent care locations, but the demand will be for more as the population grows.

The absence of new private school development is troubling. While we do not foresee the need for a major education institution to be built in Cape Coral, smaller private schools or training academies devoted to culinary, visual and performing arts, IT/communications/media, or other pursuits should be flourishing. These investments will be necessary adjuncts to the development and promotion of the targeted industries in the immediate future.

Exhibit 9.5 -- Existing Churches/Temples, Private Schools, and Clubs/Lodges by Location

Legend

- Churches, Temples
- Private Schools & Colleges
- Clubs, Lodges, and Union Hallls
- Cape Coral City Limits



Government

The Government sector is segmented into: Public County schools; Hospitals; Lee County - Other, State of Florida - Other; US Gov't – Other; and, City of Cape Coral - Other. In total, there are **108** buildings containing **4,964,644** sf, with an average age of commercial structures of **32.7** years. In the past ten years, **100,347** sf of inventory has been added, or a gain of **2.0** percent. Exhibit 9.6 (at the end of this section) illustrates the location of new government construction in the City

Public County Schools

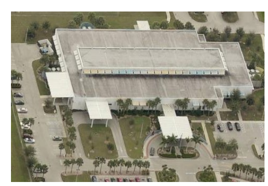
There are **16** public county schools totaling **2,824,329** sf with an average age of **32.8** yrs. In the past 10 years, no new space has been added to the inventory, making this an inactive element. The average size for a public county school is **176,521** sf.

Hospitals

There are **2** hospital properties totaling **632,409** sf with an average age of **46.7** yrs. In the past 10 years, no new space has been added to the inventory, making this an inactive element. Existing activity has primarily on Del Prado Blvd. S. (Cape Coral Hospital) and Pine Island Rd. The average hospital size is **316,205** sf.

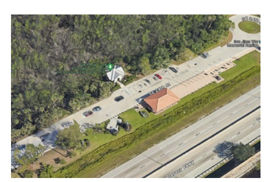
Lee County – Other

There are **4** Lee County - Other buildings totaling **102,487** sf with an average age of **26.5** yrs. In the past 10 years, no new space has been added to the inventory. Existing activity has primarily been on Veterans Pkwy., Country Club Blvd., Hancock Bridge Pkwy., and Chiquita Blvd. N. The average Lee County – other building size is **25,622** sf.



State of Florida - Other

There is **1** State of Florida - Other building totaling **1,500** sf with an age of **22.0** yrs. In the past 10 years, no new space has been added to the inventory. Existing activity has primarily been at the Four Mile Cove Ecological Preserve on Veterans Pkwy.



US Government - Other

There are **4** US Government - Other buildings totaling **281,343** sf with an age of **16.2** yrs. In the past 10 years, **48,126** sf or **17.1%** has been added to the inventory. Existing activity has primarily occurred along Diplomat Pkwy. E., Viscaya Pkwy., and Cape Coral Pkwy. The average US Government – Other building size is **70,366** sf.

City of Cape Coral - Other

There are **81** City of Cape Coral - Other buildings totaling **1,122,576** sf with an age of **29.1** yrs. In the past 10 years, **52,221** sf or **4.7%** has been added to the inventory, making this a very active element. New construction has primarily occurred on Veterans Pkwy., Nicholas Pkwy., Santa Barbara Blvd., Tropicana Pkwy., and Burnt Store Rd. The average City of Cape Coral – Other building size is **13,859** sf.

Government Summary

Investment in public facilities is often a measured and judicious process based on reasonable assumption of population growth and serviceability of selected locations. Local, state, and federal guidelines for building siting and development are beyond the scope of this study, however, some recommendations can be made from data developed during this analysis.

Public Schools

The School District of Lee County operates public county schools in Cape Coral, along with the Oasis network (one high, one middle, two elementary -- are public taxpayer funded charter schools).

According to the US Census, there are **29,569** K-12 students enrolled in Cape Coral[6], which represents **13.6%** of the total population. With a public county school space inventory of **2,824,329** sf, this equates to **95.5** sf per K-12 student. For a population growth to **375,000** persons and utilizing the same student to population ratio, Cape Coral will need an additional **2.057 million** sf of new school space to meet population demand. With the current average of **176,521** sf per school, future growth could result in a need for **12** additional schools in Cape Coral.

[6] US Census, American Community Survey, 2022 1-year estimate, Table S1401

We would recommend that the City discuss future locations options for public school demand with Lee County, including a study on the expansion potentials of the current facilities inventory to partially meet future student requirements.

Hospitals

Lee Health is the operator of the Cape Coral Hospital and the Pine Island Rd. Surgical Center. As per research, Cape Coral Hospital has **291** beds. Using the 2022 Cape Coral population figure of **216,984** persons, there are **134** beds per 100,000 population. In comparison, hospitals throughout Lee County account for **2,176** beds and equate to **265** beds per **100,000** population. The State of Florida's average is **320** beds per 100,000 population. If Cape Coral Hospital does not expand and no new hospitals are built in Cape Coral, the projected **375,000** population will result in only **78** beds per 100,000 population. To meet the Lee County standard, Cape Coral will need an additional **992** beds in the future.

Using the simple ratio of number of current beds to hospital inventory square footage, Cape Coral has **2,173** sf per bed of hospital space. To meet the **992**-bed shortfall I the future, hospital space would need to grow by an additional **2.156 million** sf.

It is clear that at least **1** new hospital is needed in Cape Coral. Public sentiment gathered through the survey process has revealed that desire for a competing health care provider to enter the market. The City should begin the process of evaluating whether continuation with a one-operator model going forward is in the best interests of the community.

State Offices

The State of Florida operates 19 agency offices in Lee County through leased offices. Given that Fort Myers is the county seat, a majority of these facilities are located there. However, Cape Coral is the largest population component of the Metropolitan Statistical Area, and in our view, should benefit from better State representation in terms of real estate utilization.

In the table below, the 19 State of Florida office locations[7] are shown by their leased square footage. In total, there is **321,851** sf of space of which Cape Coral shares only **7,049** sf or **2%** of the inventory. It is our opinion that the City should encourage the State to consider more agency locations in Cape Coral, especially as dynamic population growth will increase public services need in the future.

[7] State of Florida – Dept of Environmental Protection; leased facility search; https://prodenv.dep.state.fl.us/DslPi/searchStateFacilityLeaseNew.action

State of Florida Agency	Lee County Area SF	Cape Coral Area sf	Cape Coral Area Distrb.
Department of Management Services	176,113		
Department of Law Enforcement	43,024		
Department of Revenue	14,365		
Department of Financial Services	13,631		
Department of Health	11,938		
Department of Highway Safety and Motor Vehicles	10,000		
Department of Education	**7,458**	**100**	**1%**
Department of Juvenile Justice	**7,275**	**6,427**	**88%**
Division of Administrative Hearings	7,097		
Department of the Lottery	6,400		
Department of Agriculture And Consumer Services	**5,382**	**300**	**6%**
Department of Legal Affairs	5,181		
Fish And Wildlife Conservation Commission	1,997		
Auditor General	1,124		
Department of Economic Opportunity	1,008		
Department of Business and Professional Regulation	336		
Department of Veterans' Affairs	**222**	**222**	**100%**
Executive Office of the Governor	200		
Department of Children and Families	100		
Total floor area sf	**312,851**	**7,049**	**2%**
Total number of state agencies	**19**		

Civic Buildings

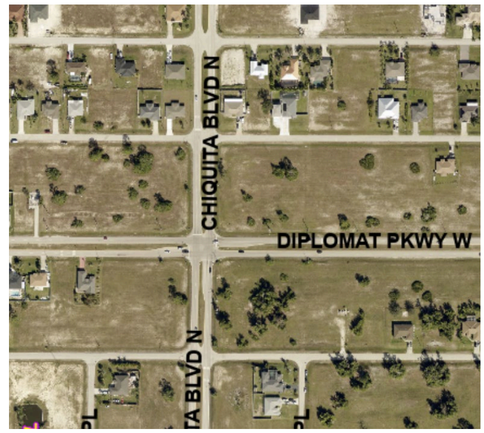
US Post Offices

While there is no specific metric for postal location based on population, the four Cape Coral US offices are generally located in the recognized four quadrants of the City:

- Northeast: 1030 SW 9th St.
- Southeast: 4722 SE 17th St.
- Northwest: 1441 SW 4th St.
- Southwest: 4706 Chiquita Blvd. S.

Post offices are often one of the key features of town centers. Traditional four-corner downtowns also feature restaurants and cafes, leisure and entertainment venues, offices, medical facilities, hospitality accommodation, and civic and cultural facilities.

Cape Coral will require additional post office locations in the future, and these locations could help create some much needed town center development. With northward expansion, currently underdeveloped intersections at major roadways such as Diplomat Pkwy. W, & Chiquita Blvd. N., Diplomat Pkwy. W, & Eldorado Blvd., or others will present opportunities for establishment of semi-concentrated commercial centers for Cape Coral.



The Future Land Use map indicates the forward thinking by the City for more commercial/professional use of these properties rather than single family housing, but civic uses should also be contemplated.

The existing post office locations can also benefit if more infill professional office or dining/retail/entertainment options are developed in their immediate vicinity. Facilities that offer parcel post shipping services are often co-located in areas of postal facilities.

<u>Libraries</u>

According to the Institute of Museum and Library Sciences (Imis.gov), the US average is approximately 3.0 public libraries and **5.8** outlets (branches, bookmobiles) for every **100,000** people. In the State of Florida, there are **296** public libraries for the **22.245 million** population, which translates to **0.75** libraries per **100,000** persons. Statista.com ranks Florida in **35th** position in this category, which is poor.

Library use is actually growing in the US. According to Words Rated (wordsrated.com), more people are attending programs at their public library than ever before. Total program attendance reached **125.55 million** in 2019, up **23.1%** since 2014 and nearly doubled since 2004.

At present there are **2** excellent public libraries in the City:

- Cape Coral Public Library – 921 SW 39th Terr.
- Northwest Regional Library – 519 Chiquita Blvd., N.

At the current population level of **216,984** in 2022, this would be equivalent to **1.1** libraries per **100,000**. But, as the City expands to possibly **375,000**, that ratio would drop **to 0.6** libraries per **100,000**. To meet even the Florida ratio of **0.75** libraries per **100,000**, Cape Coral would need **1** additional facility. Population expansion is forecasted for mainly north of Pine Island Rd. We believe that the Northwest Regional Library is well suited for the NW quadrant of the City, but a 3rd facility should be considered for the Cape NE in the future. Exhibit 9.7 (below) illustrates the importance of post offices and library locations. Cape Coral can be visualized in four-quadrants, with Veterans Pkwy. and Santa Barbara Blvd. representing the X- and Y-axes. A 3-mile buffer has been drawn around the four post office locations indicating essentially the reasoning behind their placement. The majority of Cape Coral's residents in each quadrant can easily be served by the present locations, but not so in the future. Recommended post office and library locations are indicated on the graphic.

Exhibit 9.6 – New City of Cape Coral and US Government Building by Location

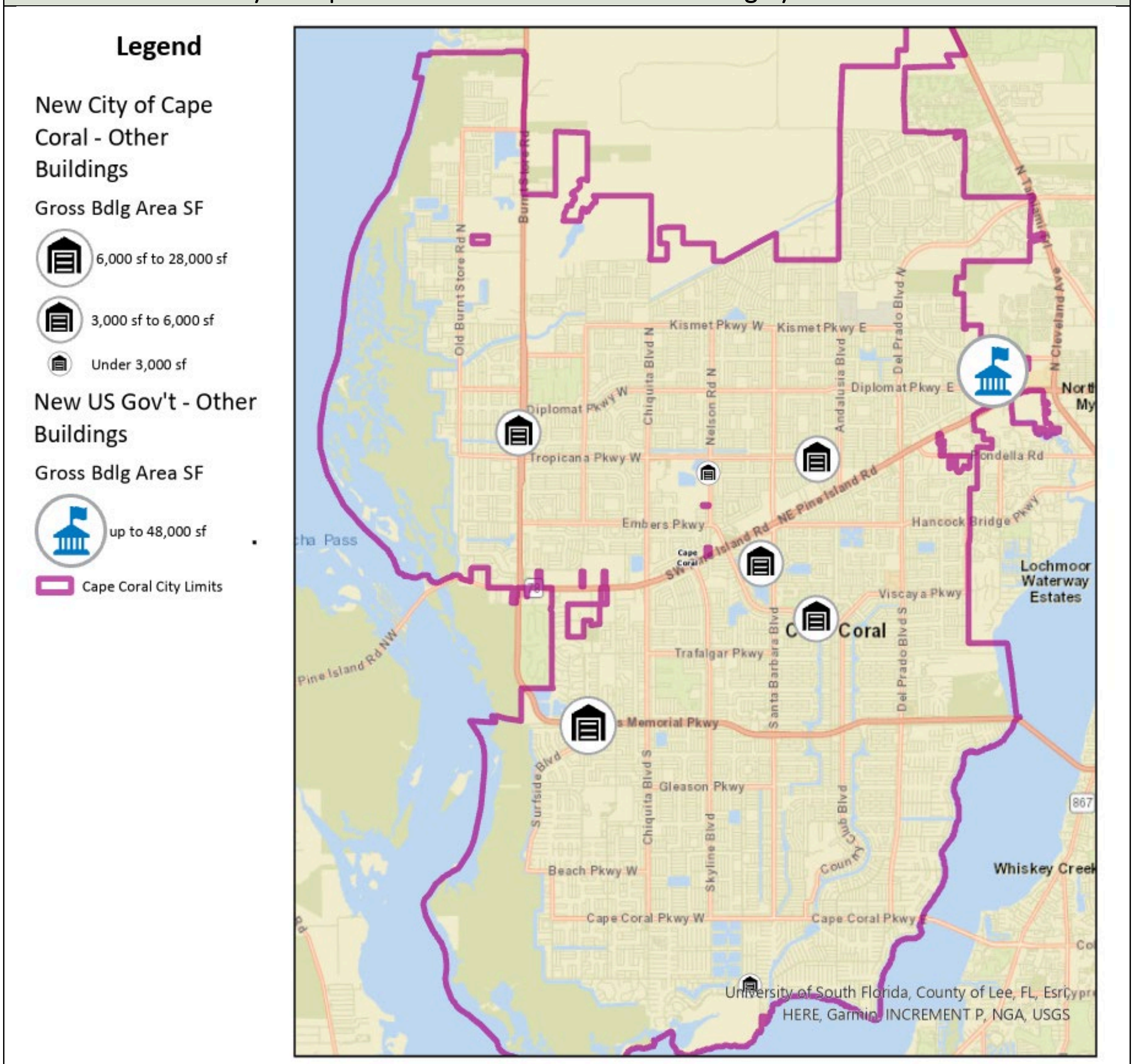
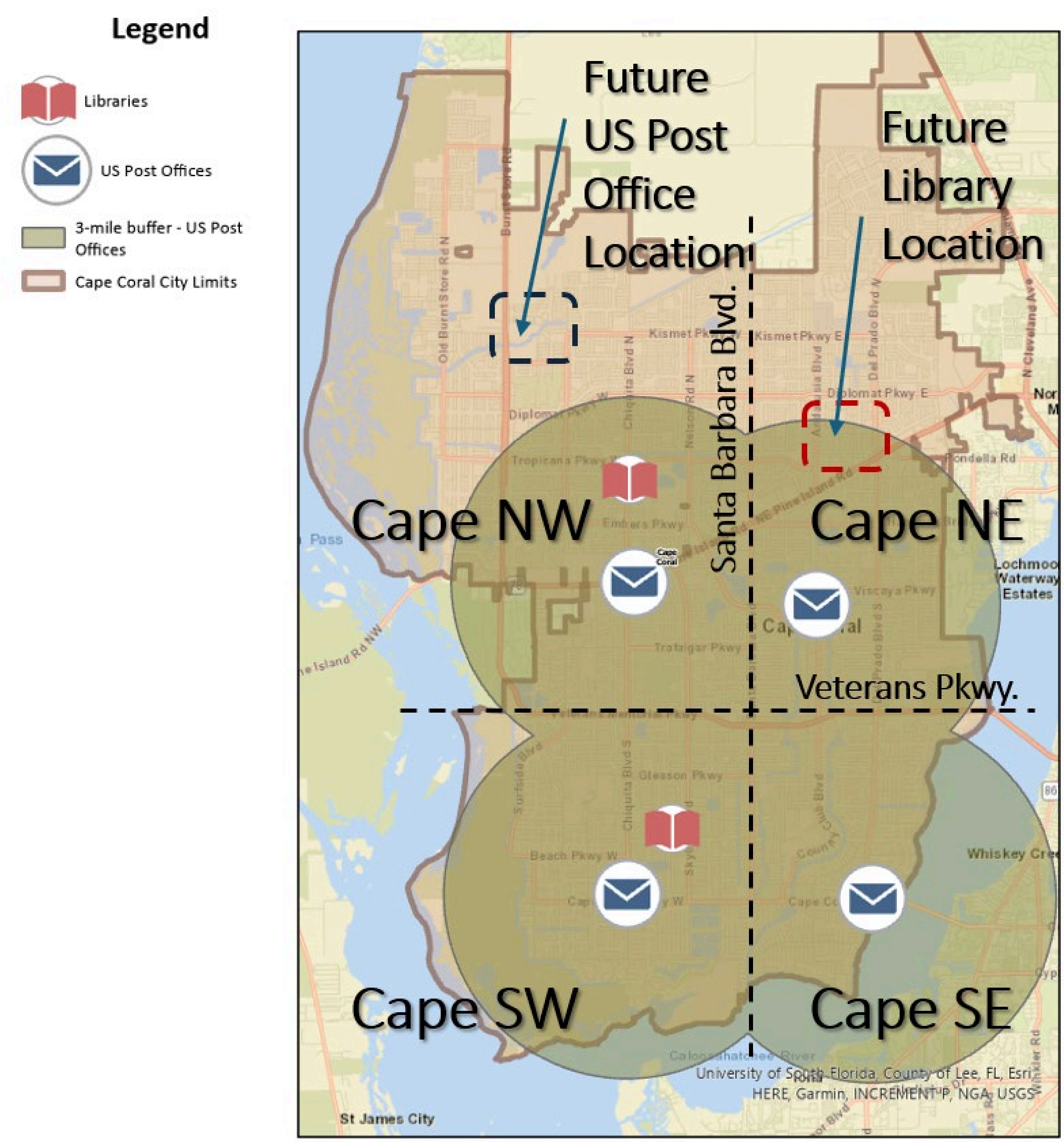


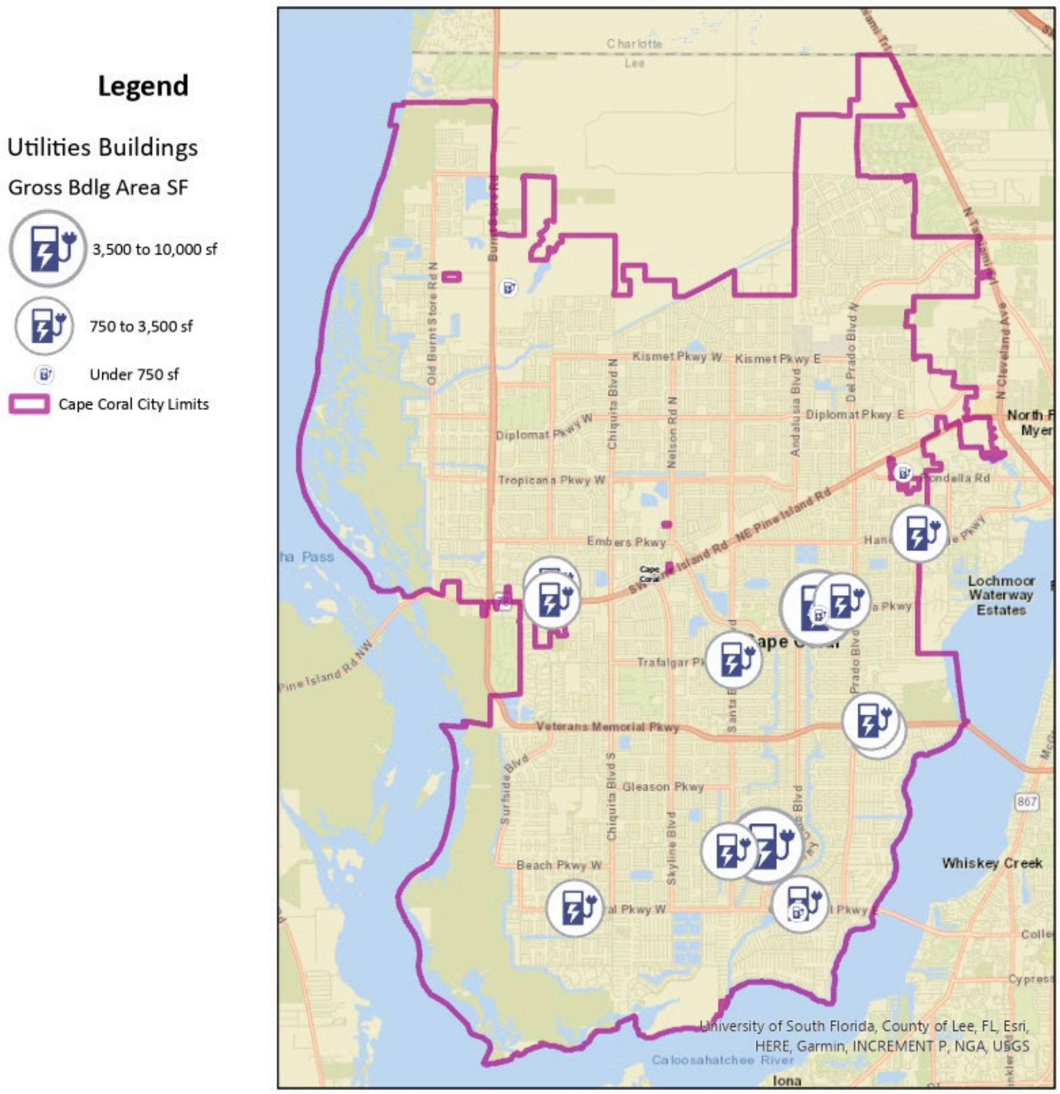
Exhibit 9.7 – Cape Coral Post Office and Library Locations



Miscellaneous

The only component of this group is Utilities. There are **16** buildings totaling **32,211** sf with an age of **28.3** yrs. In the past 10 years, no new construction has been added to the inventory, making this an inactive element. Existing construction has primarily occurred south of Pine Island Rd. on various roadways. The average building size is **2,013** sf. Locations of existing facilities are shown in Exhibit 9.8 (below).

Exhibit 9.8 – Existing Utility Building Locations



Miscellaneous Summary

Utility building construction directly follows infrastructure development and expansion. The **16** buildings are owned by 7 companies or agencies:

- Burnt Store Ltd.
- Crown Castle GT Company LLC (2 sites)
- Darren D. Chocholek Trust
- Embarq Florida Inc
- Florida Power & Light Company
- Lee County Electric Co-Op Inc. (8 sites)
- United Telephone Co. of Florida (2 sites)

Added to this list of owners would be the City's utility facilities which are likely catalogued under the Government section. While it is unknown how many new utility buildings will be needed in the future, it is certain that they will follow the population expansion northward.

Affordable Housing – A Different Approach

In the recently prepared Need for Multi-Family Rental Apartments Study prepared for the City by Reinhold P. Wolff Economic Research, Inc., there is an annual shortfall of about **704** units per year that are need to meet demand by middle income groups[8].

Our Target Industry analysis determined that new workers in tourism, industrial services, and community services will be needed in the immediate future. Many of these occupations are only at the middle-income level, and the cost of housing in Cape Coral is rapidly outpacing essential service workers' capability to live within the community they serve. While developers are benefiting from the State of Florida Live Local SB-102 workforce housing initiative, these are largely significantly-sized developments that will contain at least **71** units to be eligible. Certainly, this is a laudable program and the City should encourage its use.

We see an overlooked avenue for affordable housing that does not require such extensive investment.

[8] Need for Multi-Family Rental Apartments Study; Reinhold P. Wolff Economic Research, Inc.; May 2023

Opportunity Zones

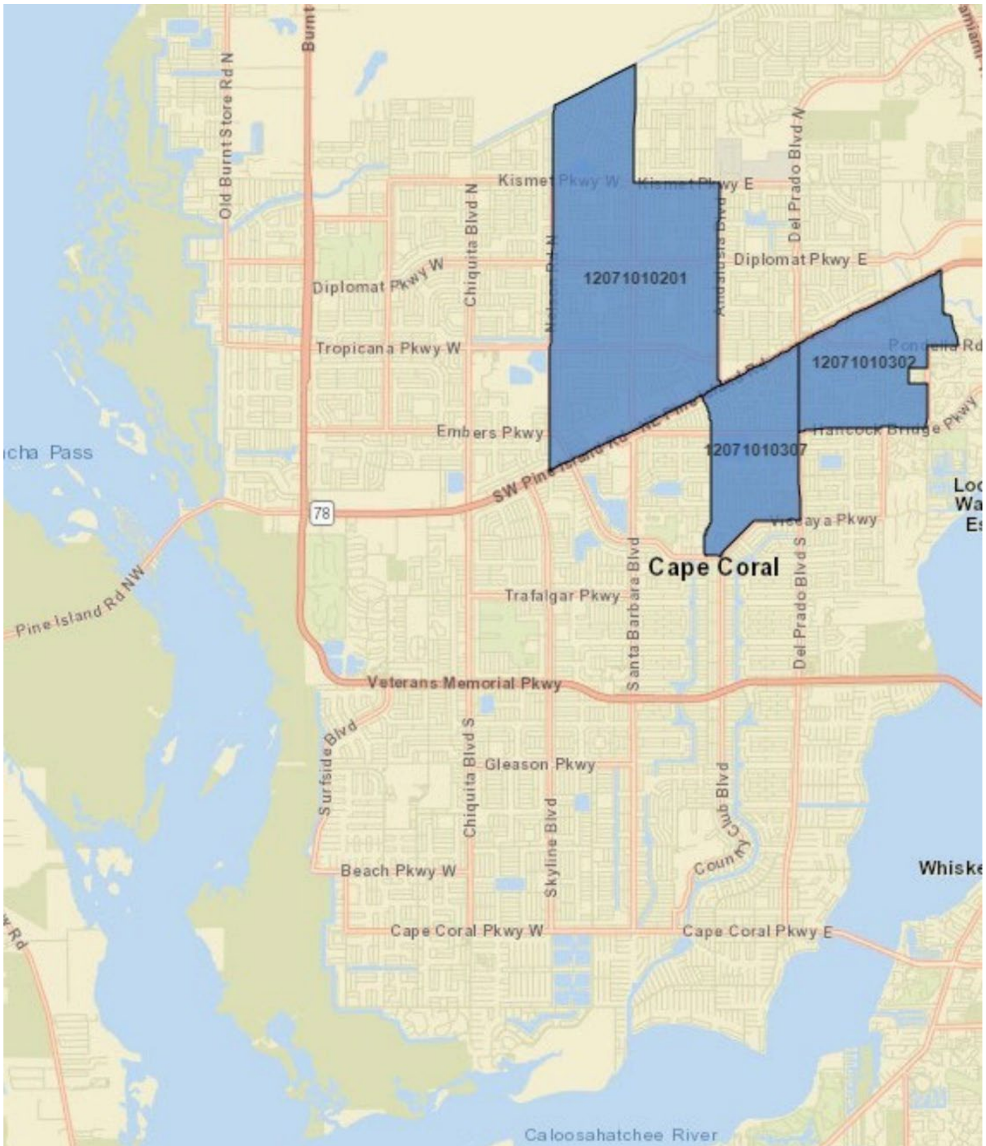
Investment in Opportunity Zones has been successful throughout the US, with many projects focusing on affordable housing. An Opportunity Zone is a designation and investment program created by the Tax Cuts and Jobs Act of 2017 allowing for certain investments in lower income areas to have tax advantages. The purpose of this program is to put capital to work that would otherwise be locked up due to the asset holder's unwillingness to trigger a capital gains tax.

In Cape Coral, there are two Opportunity Zones, consisting of three Census Tracts:

- North of Pine Island Road – Census Tract 120710102.01
- South of Pine Island Road – Census Tracts 120710103.02, 120710103.07

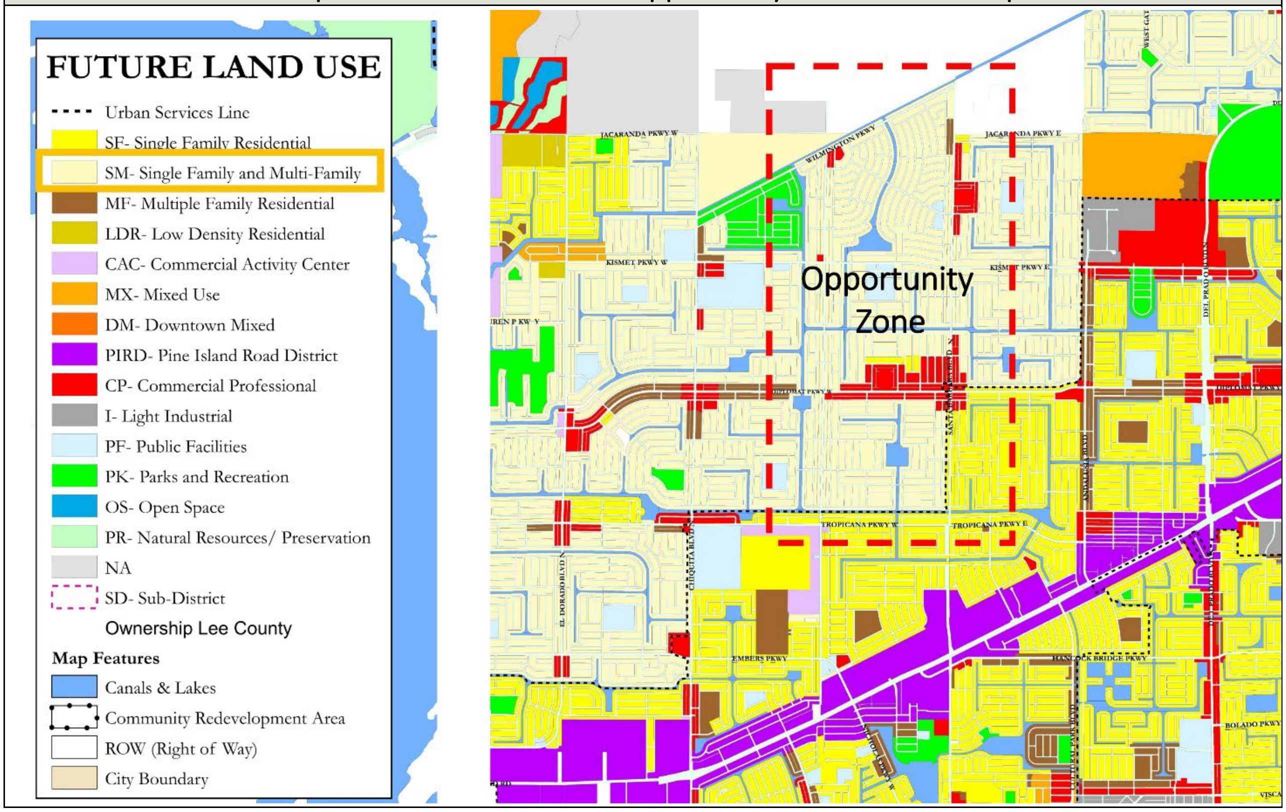
As shown in Exhibit 9.9 (below), the Cape Coral Opportunity Zones cover approximately **5,454** acres or **8.5** square miles, with a total of **17,371** parcels, 6,546 of which are vacant (**37%**). The City of Cape Coral owns **75** of the vacant parcels in OZ's, set aside for future use as well or other public assets, leaving a total of **6,471** parcels or **1,962** acres of vacant land in private ownership.

Exhibit 9.9 – Cape Coral Opportunity Zones



Recognizing that demands on land use will be changing with population increases, the City has designated its Future Land Use (FLU) categories to meet those needs. Much of the North Cape area which was previously zoned as R-1 Single Family residential has been reclassified as Single Family and Multi Family. Refer to Exhibit 9.10 (below) for more detail.

Exhibit 9.10 – North Cape Future Land Use and Opportunity Zone Relationship



By GIS analysis, we conclude that the largest FLU component of the Opportunity Zones' land use will be Single Family and Multi Family (SM). This predominance will occur north of Pine Island Road in the Census Tract 120710102.01 region.

FLU	Description	# of Vacant Parcels	Vacant Parcels Acreage
SM	**Single Family and Multi-Family**	**3,082**	**779.8**
SF	Single Family Residential	2,364	586.4
PIRD	Pine Island Road District	144	249.8
CP	Commercial Professional	632	162.7
MF	Multiple Family Residential	141	97.7
I	Light Industrial	52	62.3
Uncl.	Unclassified	7	10.1
PF	Public Facilities	33	7.7
MX	Mixed Use	15	4.2
CAC	Commercial Activity Center	1	1.5
Total Vacant Parcels		**6,471**	**1,962.3**

Opportunity Multiplex Program

We believe that there is a solution. Due to its development history, Cape Coral is a wide expanse of pre-platted residential lots with little consideration for progressive zoning of graduated land use densities. In many places throughout the City, there is lack of “four-corner” commercial development which would normally allow a scale down of uses from mid-rise commercial or mixed use gradually down to single family lots.

Assemblage is the Answer

The solution lies in the assembling of contiguous vacant lots. In real estate, two contiguous parcels can, in many instances, command higher value if combined. This term is known as “assemblage” and developers often seek opportunities to achieve property assemblages to reduce overall costs and increase buildable area of properties. In this regard, there is a benefit to the developer in terms of more building area being provided over the same land costs, resulting in lower costs per square foot of delivered product gained by efficiency. For single-family development, this approach leads to a large home to be built. But for multi-family development, this can result in additional units, such as the 4-unit project shown (right).

Source: Pinoy ePlans

In Cape Coral’s Land Development Code, R-1 zoning standards restrict density to a maximum of 4.4 housing units per acre. This is the basis for the 80 ft x 125 ft lots of 10,000 sf. The zone district dimensions table describes the setbacks and density for a single-family lot:

R-1 Zone										
Min Lot Area	Max Imp Coverage	Front	Front Cul-de-Sac	Side	Rear	Double Frontage	Corner Lot Side	Max Height	Max Density	Lot Area/Unit
10,000 sf	60%	25 ft	18 ft	7.5 ft	20 ft	25 ft	10 ft	38 ft	4.4 /acre	10,000 sf

But, given the FLU changes to allow multi-family uses in former R-1 zones, we will examine the next lowest density use, the Residential Multi-Family Low (RML).

Residential Multi-Family Low (RML) Zone										
Min Lot Area	Max Imp Coverage	Front	Front Cul-de-Sac	Side	Rear	Double Frontage	Corner Lot Side	Max Height	Max Density	Lot Area/Unit
10,000 sf	60%	25 ft	36 / 30	7.5 ft	20 / 10	25 ft	10 ft	50 ft	16.0 /acre	2,720 sf

The higher density allowance of the RML offers the potential to develop low-rise apartment projects on assembled lots in duplex, triplex, and quadplex configurations. The multiplex housing model can be accomplished in compact, walk-up, breezeway connected apartment flats that can be erected quickly and affordably on a large scale.

The proposed SM or Single Family and Multifamily zone in Cape Coral's Opportunity Zone (north) presents a unique opportunity to solve the market dilemma of affordable housing. From realtor websites, it appears that an interior 10,000 sf lot in Cape Coral is currently selling for approximately $75,000, and a waterfront lot for considerably more.

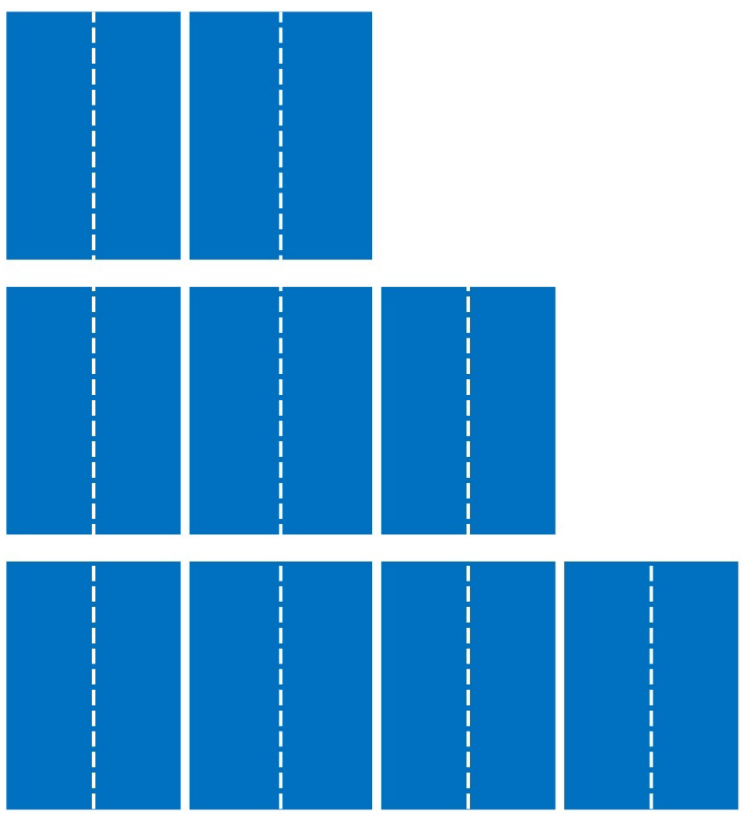
To illustrate this, a simplified development model is shown below.

Multiplex Housing Options for Cape Coral

Duplex	
# of lots	2
Max. units	8
Lots acq. Cost	$150,000
Land costs per unit	$18,750
Total lot area	20,000 sf
Lot area per unit	2,500 sf
R-1 occupancy	2 units
Housing bonus	**6 units**

Triplex	
# of lots	3
Max. units	12
Lots acq. Cost	$225,000
Land costs per unit	$18,750
Total lot area	30,000 sf
Lot area per unit	2,500 sf
R-1 occupancy	3 units
Housing bonus	**9 units**

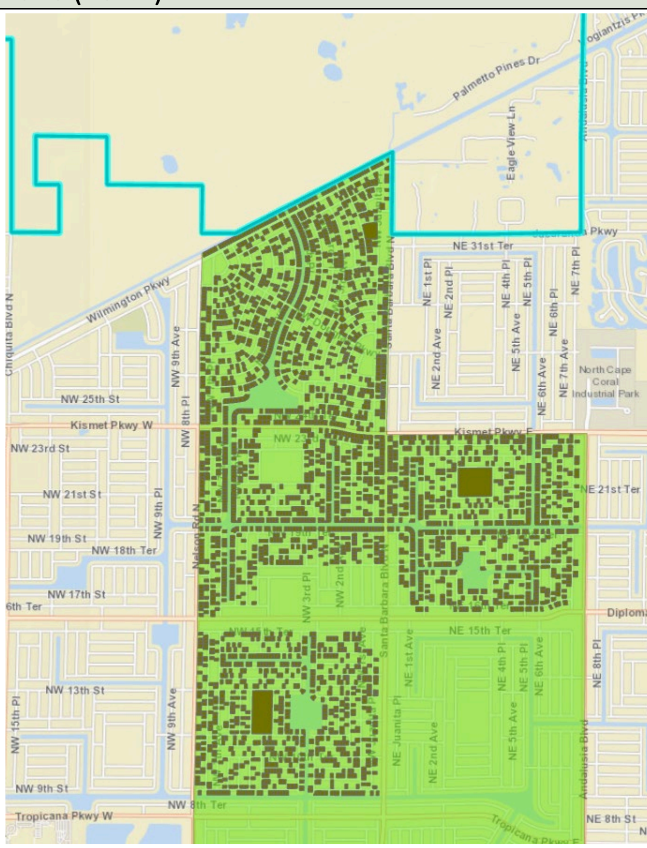
Quadriplex	
# of lots	4
Max. units	16
Lots acq. Cost	$300,000
Land costs per unit	$18,750
Total lot area	40,000 sf
Lot area per unit	2,500 sf
R-1 occupancy	4 units
Housing bonus	**12 units**



In the first scenario, a two-story duplex is constructed on **2** combined lots. Each lot contains **4** units, and a total of **8** units are produced. Total land acquisition cost is **$150,000**, and land costs per unit are calculated at **$18,750**. The example would result in a **6**-housing-unit bonus over two single family homes. In the second scenario, three lots are combined to produce a triplex of **12** units. Land acquisition is **$225,000** with the same **$18,750** per unit cost. This scenario results in a **9-**housing-unit bonus over three single family homes. In the final scenario, **4** lots are combined into a quadraplex of **16** units. Land acquisition is **$300,000** with the same **$18,750** per unit cost. This scenario results in a **12-**housing-unit bonus over three single family homes.

These project types are achievable developments that an individual or small investor pool can accomplish. Economies of scale may factor into the larger undertakings, but generally these can be fixed-cost products. Prefabrication of building components will result in greater economy as well as possibly acting as a catalyst for local industry development.

Exhibit 9.11 – Vacant SM Parcels in Opportunity Zone (north)



To illustrate the potential for multiplex affordable housing, refer to Exhibit 9.11 (left). Darkened rectangles represent the 3,082 vacant SM parcels in the Opportunity Zone (north). There are literally many dozens of site assemblage opportunities available from the plentitude of contiguous vacant parcels.

Higher density housing development should be considered as a gateway to single family homes. Accordingly, concentration of projects along major corridors or at 4-corner intersections will help to create the progressive zoning vision that is so lacking in many parts of the City.

Incentivizing Development

For many cities, the establishment of a housing authority is a necessary function to manage and operate city-owned public housing projects. For Cape Coral, this is not the case, but nevertheless, the problem remains as to how to produce affordable housing for a growing population in need. The development community is aware of the problem, and although individual builders may try and produce affordable housing product, market realities often result in market rate and above price points. Florida's Live Local Act is attempting to rectify this condition by providing support for larger multifamily projects.

For the Opportunity Multiplex Program, we need a different approach. We believe that the City of Cape Coral can encourage this type of low-impact development on a wide scale through the following:

- Pre-permitting and fast-tracking multiplex development in the Opportunity Zone.
- Allowing property tax abatement of development impact fees[9].
- Partial underwriting of insurance premiums for flood and wind coverage.
- Identifying local Development Finance Agencies (DFAs), Community Development Finance Institutions (CDFIs), traditional lenders, tax credit investors, or other government and philanthropic grants

The goal should be the attempt to lessen the gap of the annual shortfall of 700 affordable units discussed earlier. If this program could generate at least **50** new multiplex housing infill projects in the next two or three years, that would result in about **600** new affordable units based on the triplex model.

9.b – Targeted Area Analyses

There are three major areas of focus in this section, plus a brief tactical summary of a fourth area. The strategy is to promote the development of signature projects that will define Cape Coral's identity for the future.

Burnt Store 300 Site

The Burnt Store 300 site is a collection of City-Owned parcels of varying size and configuration.

[9] Florida Impact Fee Act; s. 163.31801, F.S'; City of Cape Coral Impact fees by type of development/construction: 1) residential – single family duplex; 2) commercial – multi-family over 3 units and non-residential uses. In the process of implementing a pilot impact fee program for affordable housing. Single family impact fees levied by the City would be deferred until the first sale of the property. This program will be limited to non-profit housing developers. Multi-Family impact fees will be bought down over a period using a Synthetic Tax Increment Financing model.

We believe that an executive airport with accompanying industrial park, recreation fields, and a solar farm represents the best and highest use for the property. Some assemblage of contiguous privately-held properties would be necessary to accomplish this objective. Exhibit 9.12 (below) illustrates the land assemblage concept.

<table>
<tr><th colspan="2">Exhibit 9.12 – Burnt Store 300 Parcels</th></tr>
<tr><td rowspan="4">
</td>
<td><u>Parcel A</u>
-- Strap: 304323C2000080000
-- Approximately 78 acres
-- Ownership: Private
-- Target: Acquire 100%
-- Current Zoning: Agricultural
-- Future Land Use: Mixed Use</td></tr>
<tr><td><u>Parcel B</u>
-- Strap: 304323C40001100000
-- Approximately 10 acres
-- Ownership: Private
-- Target: Subdivide 50%
-- Current Zoning: Agricultural
-- Future Land Use: Low Density Residential</td></tr>
<tr><td><u>Parcel C</u>
-- Strap: 304323C4000120000
-- Approximately 5 acres
-- Ownership: Private
-- Target: Acquire 100%
-- Current Zoning: Agricultural
-- Future Land Use: Low Density Residential</td></tr>
<tr><td><u>Parcel D</u>
-- Strap: 3304323C4000130000
-- Approximately 5 acres
-- Ownership: Private
-- Target: Acquire 100%
-- Current Zoning: Agricultural
-- Future Land Use: Low Density Residential</td></tr>
</table>

Why Build an Executive Airport?

Building an **executive airport** can offer several benefits to Cape Coral, as explained below:

- **Enhanced Connectivity**: An executive airport provides **direct access** to the city for private jets and smaller aircraft. It allows business executives, high-net-worth individuals, and government officials to fly directly to their destinations without relying on commercial airlines. Improved connectivity attracts investment, fosters economic growth, and strengthens ties with other cities and regions[1].

- **Business and Tourism Development**: An executive airport supports **business development** by facilitating corporate travel. Companies can efficiently transport executives, clients, and investors. It also encourages **luxury tourism**. Visitors seeking exclusive experiences, such as golf resorts, luxury hotels, or high-end events, can arrive directly via private jets.

- **Time Efficiency**: Executive airports reduce travel time. Passengers avoid crowded commercial terminals, security lines, and layovers. For time-sensitive business meetings or urgent matters, private jets provide unmatched speed and flexibility[1].

- **Attracting High-Value Individuals**: Cities with executive airports become **more attractive** to wealthy individuals, entrepreneurs, and celebrities. These individuals contribute to local economies and cultural vibrancy. The presence of an executive airport signals sophistication and exclusivity.

- **Job Creation and Economic Impact**: Building and operating an executive airport generates **employment opportunities**. Jobs include pilots, ground staff, maintenance crews, and administrative roles. The airport also stimulates local businesses, such as FBOs (fixed-base operators), aircraft services, and hospitality providers.

- **Flexibility for Emergency Services**: Executive airports can serve as **emergency hubs**. Medical evacuation flights, disaster relief efforts, and search-and-rescue operations benefit from quick access to smaller airports. The airport's infrastructure can be adapted for emergency services when needed.

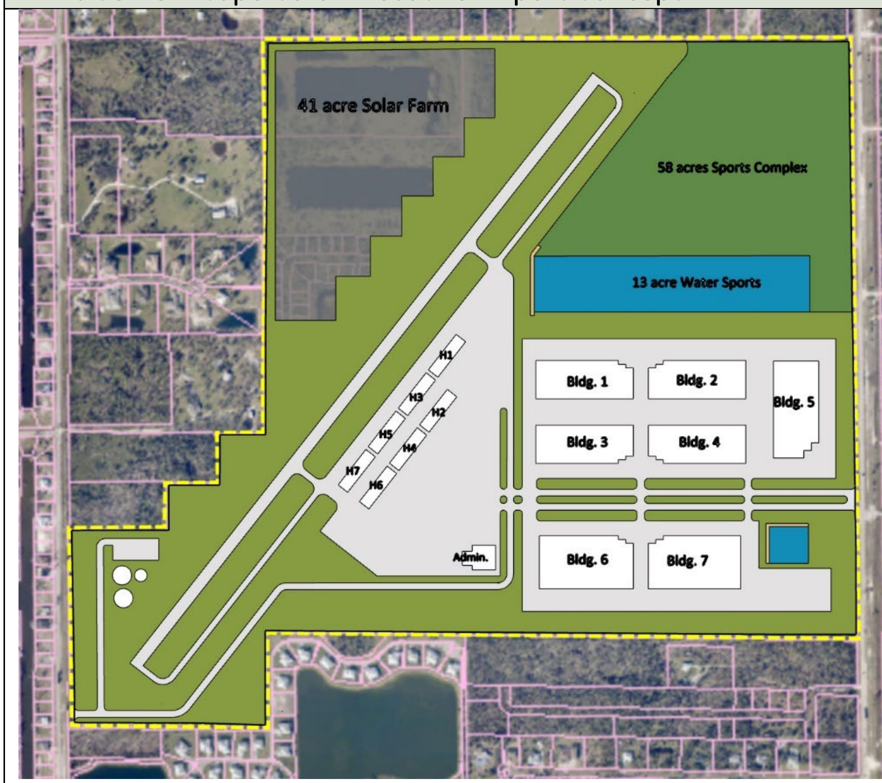
- **Real Estate Development**: Proximity to an executive airport increases property values. Luxury homes, corporate offices, and business parks near the airport become desirable locations. Real estate development around the airport can boost the city's tax base and create a thriving community.

- **Supporting General Aviation**: Executive airports cater to **general aviation** needs beyond private jets. They accommodate small planes, helicopters, and recreational flyers. General aviation contributes to local tourism, flight training, and aerial photography services.

In summary, an executive airport serves as a gateway to prosperity, convenience, and exclusivity. While it requires investment, the long-term benefits can significantly impact a city's growth and reputation.

Cape Coral Executive Airport – Concept Plan

Exhibit 9.13 – Cape Coral Executive Airport Concept



Concept Components

- Runway length: **5,000** ft (**80** ft width)
- 144,000 sf hangar space (**7** buildings)
- **180,000** sf tie-down area (**120** aircraft)
- On-site fuel storage
- **48,000** sf administration building (2-story)
- **1,175,000** sf warehouse and flex building space (7 buildings)
- **58**-acre sports/recreation field area
- **13**-acre water sports lake
- **41**-acre Solar Farm (**7.5** MW)

Development analysis reveals that the Cape Coral Executive Airport will cost **$203,658,500** segmented as follows:

Project Elements	Cost
Airport construction	$ 46,987,500
Industrial Park infrastructure	$ 8,904,400
Recreation fields	$ 8,131,800
Solar farm	$ 11,361,300
Subtotal City of Cape Coral Construction Costs	**$ 75,385,000**

Warehouses/Flex Bldgs. (by Others)	**$ 122,235,500**
Total Construction cost	**$ 197,620,500**
City of Cape Coral Land Acquisition costs	$ 6,018,000
Total City of Cape Coral Investment	**$ 81,403,000**
Grand Total Executive Airport Cost	**$ 203,638,500**

Some basic assumptions about the project include the following:

- The project will be financed entirely by the City without need of private investment
- Funds for airport development would be obtained from the Federal Grants, State Grants, and Bond Funding
- The airport, recreation fields, and solar farm would remain as non-taxable real estate
- The Industrial Park would be offered as land leased real estate subject to property taxes, paid in the form of a PILOT
- Only the roadway and infrastructure for the Industrial Park would be born by the City; building construction is not included
- The entirety of the Burnt Store 300 properties held by the City will be devoted to this project; other parcels denoted will be obtained through eminent domain
- The use of the industrial Park is envisioned as a mix of durable or non-durable goods warehousing for the City and flex industrial space serving the air transportation needs
- Recreation fields would be leasable to other public entities or private sports organizations
- The airport will serve the general aviation, private charter, cargo, and medical/emergency markets
- The projected annual visitor enplanements is estimated at **1,500** landings, providing **4,500** passengers, with an average length of stay of **7** days
- Refer to the Task 9 Appendices for detailed pro forma analysis of the airport. Eminent Domain vacant lots acquisition costs for Parcels A, B, C and D are estimated at **$6,418,000.**

Economic Impact Analysis

The Economic Impact Analysis (EIA) is provided in two parts.

<u>Construction Impacts</u>

The first is the construction impacts from a two-year period. It is assumed that the total **1,699**-person labor force will be utilized at **67%** for the first year and then the remaining **33%** for the second year. The overall impact will be **$207,170,009** consisting of:

- **$95,521,922** for labor income
- **$108,871,293** value added directly to the City of Cape Coral's S GDP
- **$2,776,794** leakage to areas outside of Cape Coral

The table below illustrates these construction impacts:

Airport Construction				
2024	**$ 46,987,500**	**Airport construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	432	$ 24,083,861	$ 24,753,388	$ 46,987,500
2 - Indirect	7	$ 422,450	$ 722,639	$ 1,480,397
3 - Induced	5	$ 223,322	$ 544,913	$ 851,980
Subtotal	**444**	**$ 24,729,633**	**$ 26,020,941**	**$ 49,319,877**
Industrial park construction				
2024	**$ 8,904,400**	**Industrial park infrastructure construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	18	$ 1,731,104	$ 5,726,227	$ 8,904,400
2 - Indirect	1	$ 95,391	$ 138,314	$ 272,654
3 - Induced	0	$ 12,524	$ 30,526	$ 47,726
Subtotal	**20**	**$ 1,839,019**	**$ 5,895,067**	**$ 9,224,780**
Recreation fields Construction				
2024	**$ 8,131,800**	**Recreation fields construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	60	$ 3,416,007	$ 3,584,367	$ 8,131,800
2 - Indirect	2	$ 107,700	$ 188,239	$ 353,584
3 - Induced	1	$ 31,735	$ 77,433	$ 121,067
Subtotal	**63**	**$ 3,555,442**	**$ 3,850,039**	**$ 8,606,451**
Solar Farm Construction				
2024	**$ 11,361,300**	**Solar farm construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	17	$ 951,667	$ 5,229,562	$ 11,361,300
2 - Indirect	2	$ 106,455	$ 166,838	$ 328,367
3 - Induced	0	$ 6,870	$ 16,743	$ 26,177
Subtotal	19	$ 1,064,992	$ 5,413,143	$ 11,715,844
Warehouses/Flex Building Construction (by Others)				
2024	**$ 122,235,500**	**Warehouses/Flex Building Construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	1,125	$ 62,652,892	$ 64,394,632	$ 122,235,500
2 - Indirect	17	$ 1,098,983	$ 1,879,908	$ 3,851,174
3 - Induced	12	$ 580,961	$ 1,417,563	$ 2,216,382
Subtotal	**1,154**	**$ 64,332,835**	**$ 67,692,103**	**$ 128,303,056**

Total Construction				
2024	$ 197,620,500	Total project construction cost		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	1,653	$ 92,835,530	$ 103,688,175	$ 197,620,500
2 - Indirect	28	$ 1,830,979	$ 3,095,940	$ 6,286,176
3 - Induced	18	$ 855,412	$ 2,087,178	$ 3,263,332
Grand Total	**1,699**	**$ 95,521,922**	**$ 108,871,293**	**$ 207,170,009**

Operational Impacts

Operational impacts are determined by the revenue produced by the airport, employment by the tenant spaces, and impact of visitor spending. Overall, **1,247** new jobs will be created and the total operational impact will be **$331,318,466**, as shown below:

- **$125,499,372** for labor income
- **$189,149,571** value added directly to the City of Cape Coral's S GDP
- **$16,669,523** leakage to areas outside of Cape Coral

The table below shows these operational impacts:

Airport Operations				
2024	$ 2,932,000	Airport revenues		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	6	$ 531,645	$ 1,167,715	$ 2,841,000
2 - Indirect	0	$ 26,633	$ 34,839	$ 62,277
3 - Induced	0	$ 4,098	$ 11,187	$ 16,863
Subtotal	**7**	**$ 562,376**	**$ 1,213,741**	**$ 2,920,140**
Industrial park Operations 1				
2024	588	Wholesale durable goods employment		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	588	$ 75,730,647	$ 133,990,083	$ 242,730,113
2 - Indirect	110	$ 5,550,308	$ 8,161,511	$ 15,405,815
3 - Induced	16	$ 766,526	$ 1,870,700	$ 2,924,890
Subtotal	**714**	**$ 82,047,482**	**$ 144,022,295**	**$ 261,060,818**
Industrial park Operations 2				
2024	392	Air transportation services employment		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	392	$ 36,431,473	$ 33,536,964	$ 49,061,041
2 - Indirect	23	$ 1,626,287	$ 1,736,578	$ 2,887,329
3 - Induced	9	$ 430,283	$ 1,050,618	$ 1,642,701

Subtotal	**424**	**$ 38,488,043**	**$ 36,324,160**	**$ 53,591,071**
Recreation fields Operations				
	15	**Recreation support employment**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	15	$ 181,925	$ 751,674	$ 2,627,455
2 - Indirect	1	$ 48,931	$ 88,894	$ 222,687
3 - Induced	0	$ 1,566	$ 4,273	$ 6,441
Subtotal	**16**	**$ 232,422**	**$ 844,841**	**$ 2,856,583**
Solar Farm Operations				
2024	**$ 657,000**	**Solar generation revenue**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	1	$ 53,693	$ 295,050	$ 641,000
2 - Indirect	0	$ 3,179	$ 5,900	$ 11,884
3 - Induced	0	$ 264	$ 718	$ 1,083
Subtotal	**1**	**$ 57,135**	**$ 301,668**	**$ 653,966**
Total Visitor Expenditures				
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	83	$ 4,007,923	$ 6,247,778	$ 9,872,180
2 - Indirect	2	$ 77,820	$ 123,707	$ 256,102
3 - Induced	1	$ 26,169	$ 71,382	$ 107,606
Subtotal	**85**	**$ 4,111,913**	**$ 6,442,867**	**$ 10,235,888**
Total Operations				
Impact	Employment	Labor Income	GDP	Output
1 - Direct	1,085	$ 116,937,306	$ 175,989,263	$ 307,772,789
2 - Indirect	136	$ 7,333,159	$ 10,151,430	$ 18,846,094
3 - Induced	26	$ 1,228,906	$ 3,008,878	$ 4,699,583
Grand Total	**1,247**	**$ 125,499,372**	**$ 189,149,571**	**$ 331,318,466**

<u>Total Impacts</u>

When combined, the total impacts for the Cape Coral Executive Airport will be measured over time, since construction will precede operations. In the table below, a **12**-year timeline is presented, with the first 2 years representing the construction period, and the subsequent **10** years showing operations. Operations has a ramped utilization factor applied for 100% obtained over 4 years. The additive total impacts for the **12**-year timeline is **$3,150,757,887**. However, since future money has a different value than present-day dollars, the Net Present Value (NPV) of the figure is needed. Utilizing the Federal Reserve's current **5.5%** discount rate, the NPV for the **12** years is **$2,134,009,191**. With the initial investment of **$203,638,500**, the Cape Coral Executive Airport will return approximately **$11** for each total dollar invested, making this concept a viable plan for the City. For the direct investment by the City, the return is about **$26**. The following table illustrates the timeline:

Timeline	Employment	Labor Income	GDP ValueAdded	Output
Yr. 1 - Construction	1,139	$ 63,999,688	$ 72,943,766	$ 138,803,906
Yr. 2 - Construction	561	$ 31,522,234	$ 35,927,527	$ 68,366,103
Yr. 3 - Operational Yr. 1	542	$ 58,468,653	$ 87,994,632	$ 153,886,394
Yr. 4 - Operational Yr. 2	835	$ 84,084,579	$ 126,730,213	$ 221,983,372
Yr. 5 - Operational Yr. 3	935	$ 94,124,529	$ 141,862,179	$ 248,488,850
Yr. 6 - Operational Yr. 4	1,247	$ 125,499,372	$ 189,149,571	$ 331,318,466
Yr. 7 - Operational Yr. 5	1,247	$ 125,499,372	$ 189,149,571	$ 331,318,466
Yr. 8 - Operational Yr. 6	1,247	$ 125,499,372	$ 189,149,571	$ 331,318,466
Yr. 9 - Operational Yr. 7	1,247	$ 125,499,372	$ 189,149,571	$ 331,318,466
Yr. 10 - Operational Yr. 8	1,247	$ 125,499,372	$ 189,149,571	$ 331,318,466
Yr. 11 - Operational Yr. 9	1,247	$ 125,499,372	$ 189,149,571	$ 331,318,466
Yr. 12 - Operational Yr. 10	1,247	$ 125,499,372	$ 189,149,571	$ 331,318,466
Grand Total	**2,946**	**$ 1,210,695,285**	**$ 1,789,505,316**	**$ 3,150,757,887**
Net Present Value (NPV)		**$ 824,370,090**	**$ 1,209,666,469**	**$ 2,134,009,191**
Discount rate	**5.5%**			
Total Project Cost				**$ 203,638,500**
Return for Every Dollar Spent by All Parties				**$ 10.48**
Return for Every Dollar Spent by City of Cape Coral				**$ 26.22**

Del Prado North Commerce Park Site

Cape Coral Corporate Park

The Del Prado N. Commerce Park site is an undeveloped property with over **1/3** (**38%**) of its area in a wetlands, preserve and cypress head natural state. Development on the site must be carefully planned to be in harmony with the natural environment.

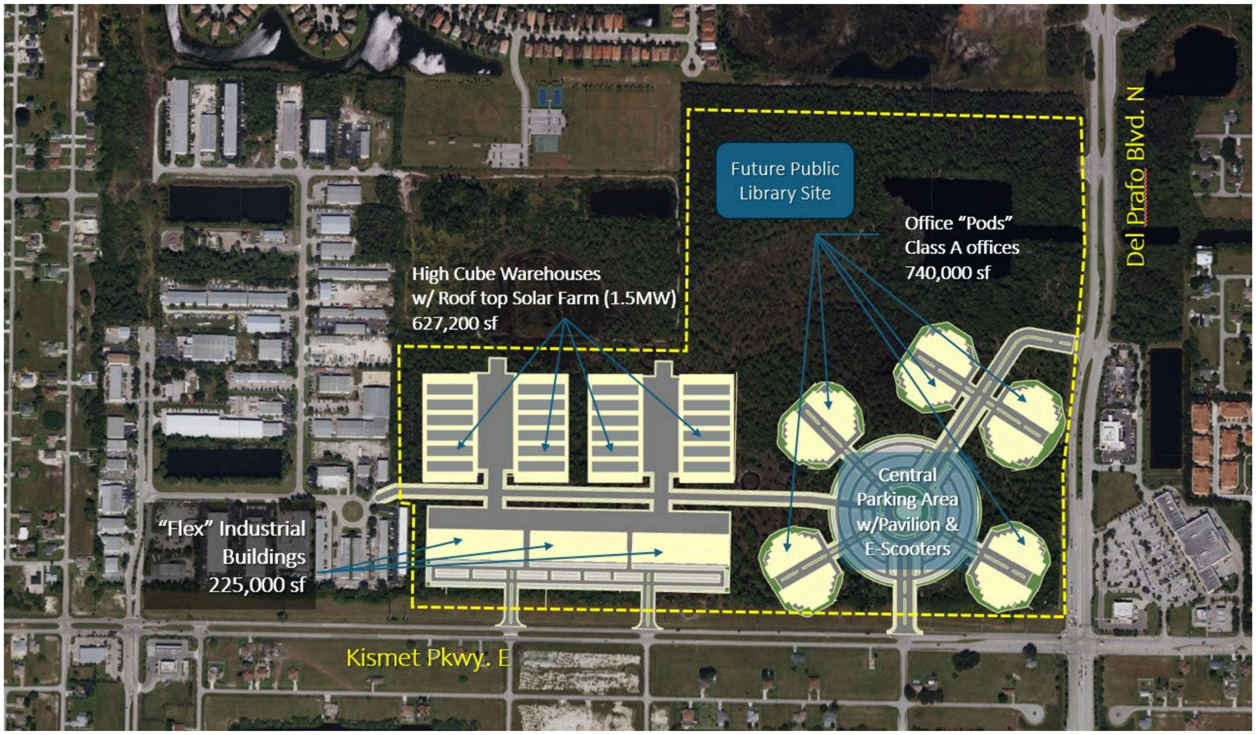
The Cape Coral Corporate Park should be a model of sustainable integration that generates the positive financial outcomes required for its implementation. While road front construction along Del Prado N. Blvd, and Kismet Pkwy. E would be easily achievable; the main objective is to penetrate the interior of the site with a road network that will serve well-placed development areas that have the least impact possible on sensitive lands. See Exhibit 9.14 (below).

Exhibit 9.14 – Del Prado North Commerce Park Site

We envision office "pods" with limited surface area and a flow of vegetative and water features as part of their site plans. A centralized parking area near the Park's entry from Kismet Pkwy. E. would be reachable from both Del Prado Blvd. N and the existing N. Cape Coral Industrial Park by the interior roadway. Extensive use of public e-scooters available at the central parking area pavilion is envisioned, thereby limiting car movement throughout the site.

The extensive paving scheme for the roadway and parking area would be enhanced using bio-retention techniques. Asphalt below car parking zones would be permeable paving, medians and buffers would be built as rain gardens, and rainwater harvesting storage would be used for non-potable water purposes. Refer to Exhibit 9.15 (below) for the site configuration.

Exhibit 9.15 – Cape Coral Corporate Park Concept Plan



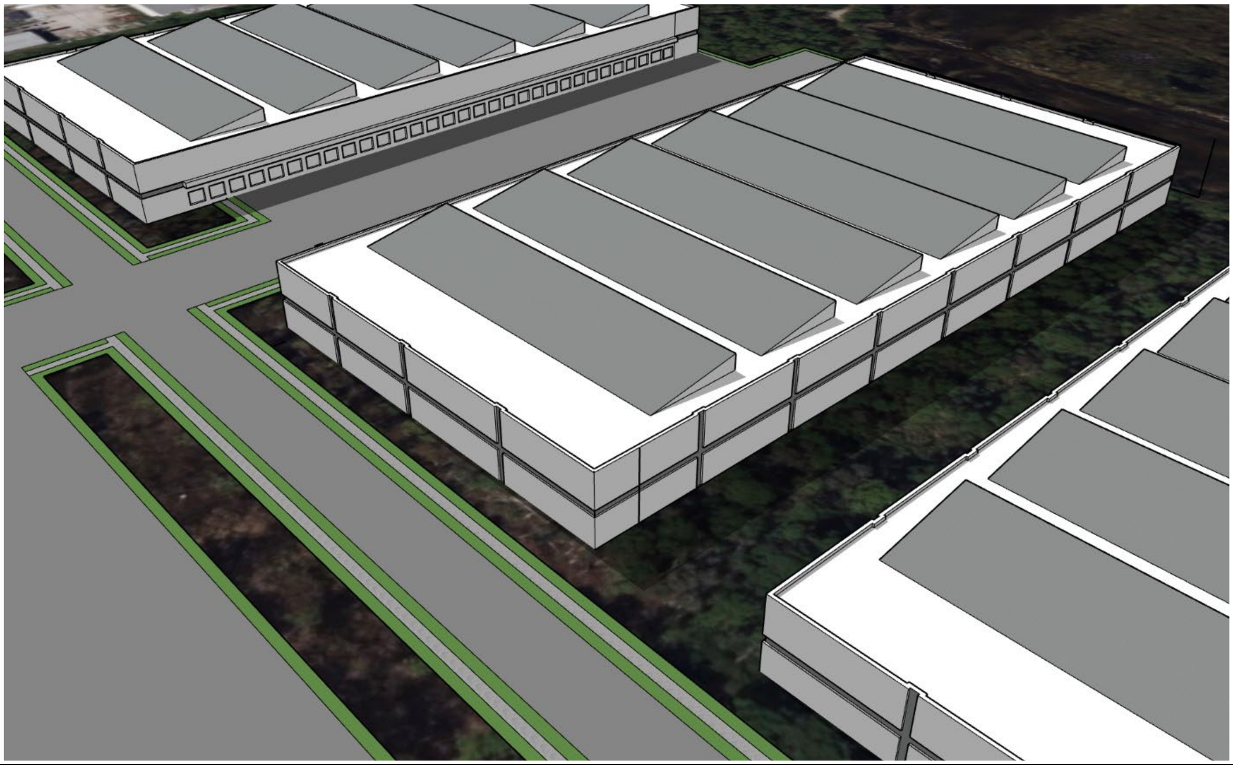
Overview

Aerial view from Del Prado Blvd, N.

Office Pods - Concept

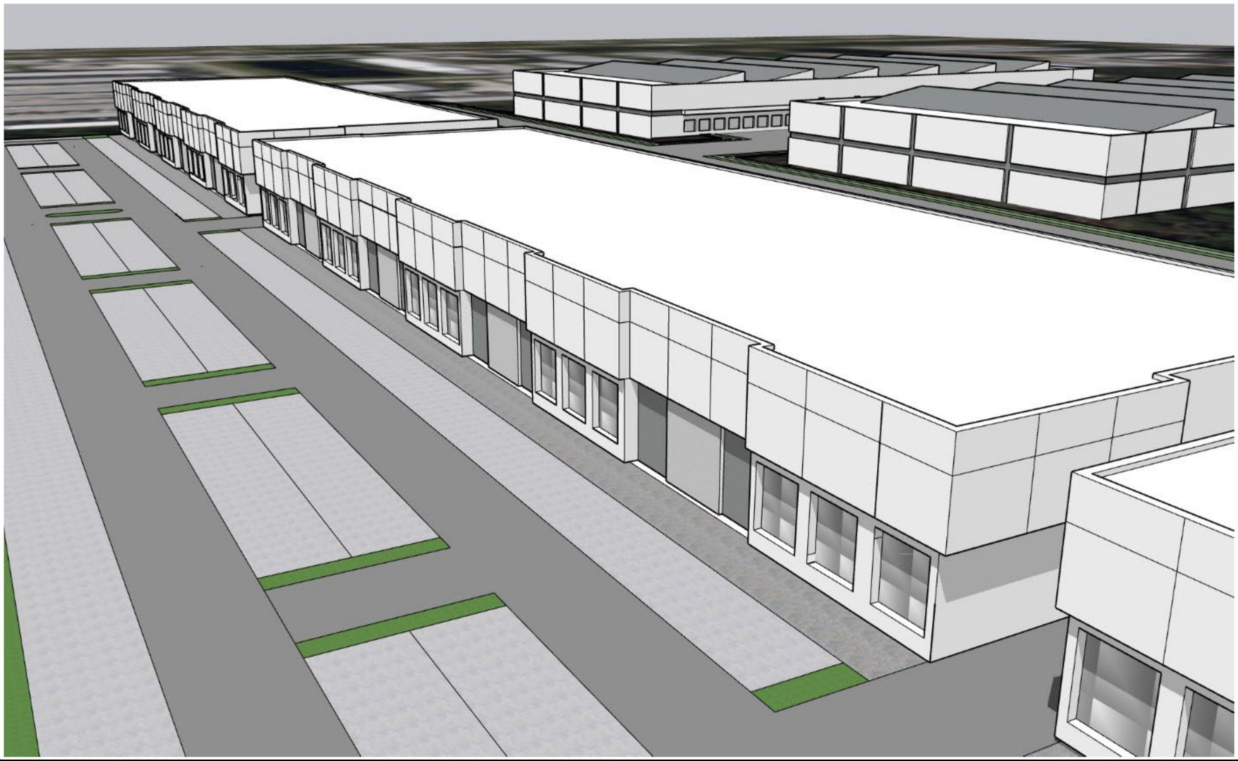
- Two-story (possibly three-story) raised Class A office space
- Limited car parking below buildings for handicapped and senior management
- **37,000** sf floor plates in mirrored building configuration, **74,000** sf per floor. Fully subdividable into smaller units
- Total of **148,000** sf per office pod
- E-scooter rack parking with electric charge station
- Integration of natural vegetation and water features with parking areas
- Total building area (5 pods): **744,000** sf

Warehouses – Concept



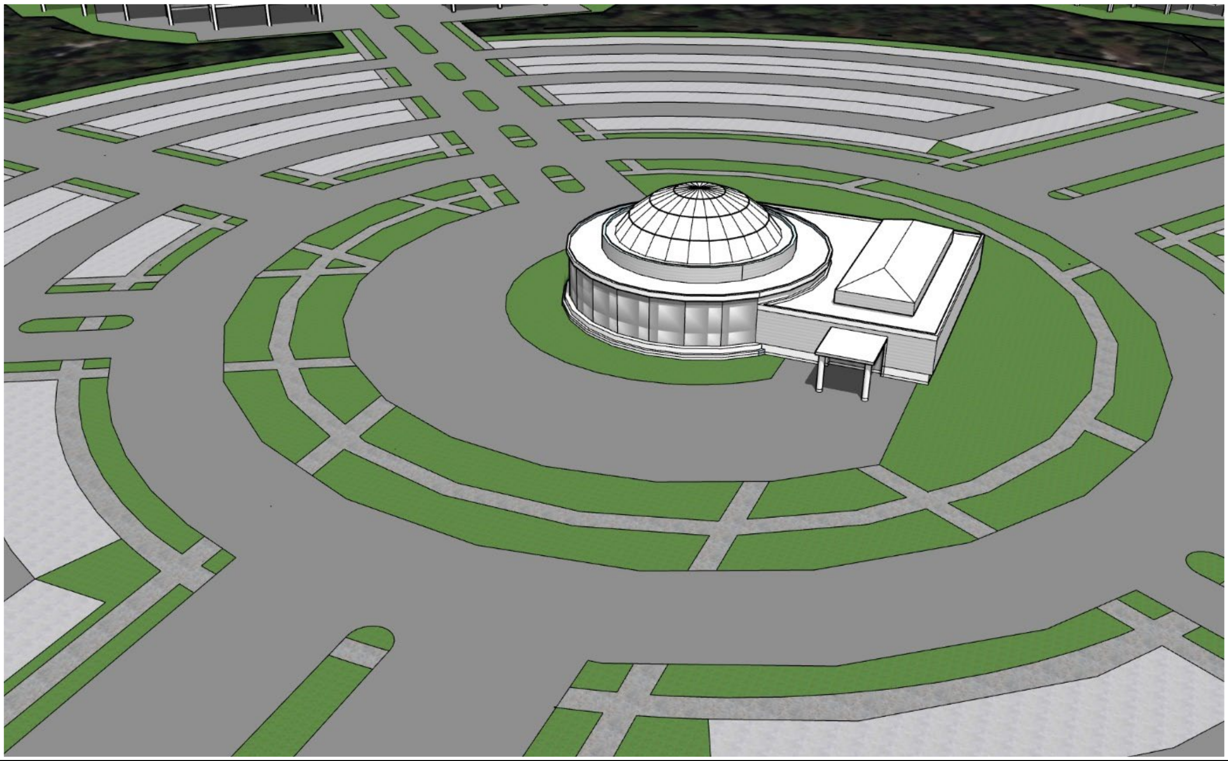
- High cube design (**40** ft ceilings) with raised loading docks
- Truck access from 24th Lane in N. Cape Coral Industrial Park
- **156,800** sf per warehouse building; **627,200** sf total in **4** buildings
- Roof-top solar farm (owned by the City of Cape Coral); **8.2** acres in total; **1.5** MW generation
- Total building area (4 buildings): **672,200** sf

Flex Buildings -Concept



- Modern office accommodations supported by rear manufacturing space
- Flexible configuration subdividable into **8** units per building
- Road frontage and access from Kismet Pkwy E.
- Rear loading area with raised dock for each unit
- **75,000** sf per building (**9,375** sf per unit minimum); **225,000** sf total in **3** buildings
- Total building area (3 buildings): **225,000** sf

Central Park



- Centralized parking area (**1,000** cars)
- Permeable paving in parking lots, rain boxes and bio-retention methods employed throughout
- Architecturally distinct Pavilion building with leasing office, snack bar and meeting space; **10,000** sf
- E-scooter pick-up area with rack electric charging stations

Financial Analysis

Development analysis reveals that the Cape Coral Corporate Park will cost **$215,930,000**, segmented as follows:

Project Elements	Cost
Roads/Utilities	$ 48,893,000
Pavilion Bldg.	$ 3,161,000
Solar farm	$ 2,134,000
Subtotal City of Cape Coral Construction Costs	**$ 54,188,000**
Office bldgs. construction (by Others)	$ 87,979,000
Warehouses construction (by Others)	$ 43,863,000
Flex bldgs. construction (by Others)	$ 29,900,000
Subtotal Construction by Others	**$ 161,742,000**
Total Construction cost	**$ 215,930,000**

Some basic assumptions about the project include the following:

- The property will remain under the ownership of the City of Cape Coral
- Environmental surveying will determine the appropriate portions of the site that will accommodate development without impact to wetlands, preserve, or sensitive areas
- The City will develop the roadway, parking areas, and utility infrastructure to proposed building sites
- Office warehouse, and flex building sites will be offered as land leases
- The City will have the right to construct and own a solar farm on the rooftops of warehouses once constructed

Refer to the Task 9 Appendices for detailed pro forma analysis of the Park.

Economic Impact Analysis

The Economic Impact Analysis (EIA) is provided in two parts.

<u>Construction Impacts</u>

The first is the construction impacts from a two-year period. It is assumed that the total 1,857-person labor force will be utilized at 67% for the first year and then the remaining 33% for the second year. The overall impact will be **$223,126,875**, consisting of:

- $103,866,578 for labor income
- **$117.527,538** value added directly to the City of Cape Coral's S GDP
- **$1,732,760** leakage to areas outside of Cape Coral

The table below illustrates these construction impacts:

Roads/Utilities Construction				
2024	$ 48,893,000	Roads/Utilities		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	302	$ 17,223,162	$ 25,679,825	$ 48,893,000
2 - Indirect	4	$ 285,093	$ 476,062	$ 940,368
3 - Induced	3	$ 118,535	$ 323,386	$ 487,485
Subtotal	**309**	**$ 17,626,791**	**$ 26,479,273**	**$ 50,320,852**
Pavilion Building Construction				
2024	**$ 3,161,000**	**Pavilion Building**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	29	$ 1,620,199	$ 1,665,240	$ 3,161,000
2 - Indirect	0	$ 18,095	$ 30,305	$ 63,790
3 - Induced	0	$ 11,177	$ 30,494	$ 45,968
Subtotal	**30**	**$ 1,649,471**	**$ 1,726,039**	**$ 3,270,758**
Solar Farm Construction				
2024	**$ 2,134,000**	**Solar farm construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	3	$ 178,752	$ 982,272	$ 2,134,000
2 - Indirect	0	$ 10,582	$ 19,643	$ 39,563
3 - Induced	0	$ 878	$ 2,391	$ 3,605
Subtotal	**3**	**$ 190,213**	**$ 1,004,305**	**$ 2,177,167**
Offices/Warehouses/Flex Buildings Construction (by Others)				
2024	**$ 161,742,000**	**Offices/Warehouses/Flex Buildings Construction (by Others)**		
1 - Direct	1,488	$ 82,902,300	$ 85,206,969	$ 161,742,000
2 - Indirect	15	$ 925,903	$ 1,550,634	$ 3,264,027
3 - Induced	12	$ 571,901	$ 1,560,317	$ 2,352,071
Subtotal	**1,515**	**$ 84,400,103**	**$ 88,317,920**	**$ 167,358,097**
Total Construction				
2024	**$ 2,134,000**	**Total project construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	1,822	$ 101,924,413	$ 113,534,306	$ 215,930,000
2 - Indirect	19	$ 1,239,674	$ 2,076,644	$ 4,307,748
3 - Induced	15	$ 702,491	$ 1,916,588	$ 2,889,127
Grand Total	**1,857**	**$ 103,866,578**	**$ 117,527,538**	**$ 223,126,875**

Operational Impacts

Operational impacts are determined by the revenue produced by the Park and employment by the tenant spaces. Overall, 4,908 new jobs will be created and the total operational impact will be **$1,532,336,671** as shown below:

- **$299,645,919** for labor income
- **$563,416.495** value added directly to the City of Cape Coral's S GDP
- **$699,274,257** leakage to areas outside of Cape Coral

The table below shows these operational impacts:

Warehouse operations				
2024	**418**	**Wholesale durable goods employment**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	418	$ 53,835,732	$ 95,251,454	$ 172,553,040
2 - Indirect	41	$ 2,006,231	$ 3,078,887	$ 6,274,488
3 - Induced	9	$ 395,821	$ 1,080,277	$ 1,628,377
Subtotal	**468**	**$ 56,237,784**	**$ 99,410,618**	**$ 180,455,904**
Flex Building Operations				
2024	**300**	**Miscellaneous manufacturing employment**		
1 - Direct	300	$ 21,576,317	$ 28,974,058	$ 85,916,380
2 - Indirect	9	$ 569,316	$ 960,280	$ 1,940,106
3 - Induced	2	$ 108,749	$ 296,147	$ 446,524
Subtotal	**311**	**$ 22,254,381**	**$ 30,230,485**	**$ 88,303,010**
Office Building Operations - Miscellaneous Professional, technical services employment				
2024	**1,221**	**Miscellaneous Professional, technical services**		
1 - Direct	1,221	$ 89,876,053	$ 172,043,312	$ 373,982,293
2 - Indirect	101	$ 4,890,963	$ 7,482,945	$ 15,698,941
3 - Induced	15	$ 712,856	$ 1,945,934	$ 2,933,167
Subtotal	**1,338**	**$ 95,479,872**	**$ 181,472,191**	**$ 392,614,401**
Office Building Operations - Financial services employment				
2024	**1,221**	**Financial services**		
1 - Direct	1,221	$ 35,082,112	$ 37,867,631	$ 182,635,982
2 - Indirect	71	$ 3,639,838	$ 5,230,546	$ 11,699,474
3 - Induced	9	$ 411,556	$ 1,125,269	$ 1,695,818
Subtotal	**1,301**	**$ 39,133,505**	**$ 44,223,446**	**$ 196,031,274**
Office Building Operations - Insurance services employment				
2024	**1,258**	**Insurance services**		
1 - Direct	1,258	$ 73,882,242	$ 189,308,324	$ 623,851,022
2 - Indirect	195	$ 10,356,836	$ 16,432,862	$ 46,605,338
3 - Induced	12	$ 549,582	$ 1,499,180	$ 2,259,955
Subtotal	**1,465**	**$ 84,788,660**	**$ 207,240,366**	**$ 672,716,316**

Pavilion Building - Administrative services employment				
2024	**25**	**Administrative services**		
1 - Direct	25	$ 1,696,187	$ 702,268	$ 1,947,583
2 - Indirect	1	$ 33,127	$ 47,127	$ 93,050
3 - Induced	0	$ 11,082	$ 30,225	$ 45,564
Subtotal	**26**	**$ 1,740,396**	**$ 779,620**	**$ 2,086,197**
Solar Farm operations				
2024	**$133,000**	**Solar farm revenue**		
1 - Direct	0	$ 10,638	$ 58,458	$ 127,000
2 - Indirect	0	$ 630	$ 1,169	$ 2,354
3 - Induced	0	$ 52	$ 142	$ 215
Subtotal	**0**	**$ 11,320**	**$ 59,769**	**$ 129,569**
Total Operations Impacts				
2024				
1 - Direct	4,443	$ 275,959,281	$ 524,205,504	$ 1,441,013,300
2 - Indirect	418	$ 21,496,940	$ 33,233,816	$ 82,313,752
3 - Induced	47	$ 2,189,698	$ 5,977,175	$ 9,009,619
Subtotal	**4,908**	**$ 299,645,919**	**$ 563,416,495**	**$ 1,532,336,671**

Total Impacts

When combined, the total impacts for the Cape Coral Corporate Park will be measured over time, since construction will precede operations. In the table below, a 12-year timeline is presented, with the first 2 years representing the construction period, and the subsequent 10 years showing operations. Operations has a ramped utilization factor applied for 100% obtained over 4 years. The additive total impacts for the 12-year timeline is **$13,891,569,978**. However, since future money has a different value than present-day dollars, the Net Present Value (NPV) of the figure is needed. Utilizing the Federal Reserve's current 5.5% discount rate, the NPV for the 12 years is **$9,231,367,241**. With the initial investment of **$215,930,000**, the Cape Coral Corporate Park will return approximately **$43** for each total dollar invested, making this concept a viable plan for the City. For the direct investment by the City, the return is **$170**. The following table illustrates the timeline:

Timeline	Employment	Labor Income	GDP ValueAdded	Output
Yr. 1 - Construction	1,244	$ 69,590,607	$ 78,743,450	$ 149,495,006
Yr. 2 - Construction	613	$ 34,275,971	$ 38,784,087	$ 73,631,869
Yr. 3 - Operational Yr. 1	2,454	$ 149,822,959	$ 281,708,247	$ 766,168,335
Yr. 4 - Operational Yr. 2	3,289	$ 200,762,766	$ 377,489,052	$ 1,026,665,569
Yr. 5 - Operational Yr. 3	3,681	$ 224,734,439	$ 422,562,371	$ 1,149,252,503
Yr. 6 - Operational Yr. 4	4,908	$ 299,645,919	$ 563,416,495	$ 1,532,336,671
Yr. 7 - Operational Yr. 5	4,908	$ 299,645,919	$ 563,416,495	$ 1,532,336,671
Yr. 8 - Operational Yr. 6	4,908	$ 299,645,919	$ 563,416,495	$ 1,532,336,671
Yr. 9 - Operational Yr. 7	4,908	$ 299,645,919	$ 563,416,495	$ 1,532,336,671
Yr. 10 - Operational Yr. 8	4,908	$ 299,645,919	$ 563,416,495	$ 1,532,336,671
Yr. 11 - Operational Yr. 9	4,908	$ 299,645,919	$ 563,416,495	$ 1,532,336,671
Yr. 12 - Operational Yr. 10	4,908	$ 299,645,919	$ 563,416,495	$ 1,532,336,671
Grand Total	**6,765**	**$ 2,776,708,173**	**$ 5,143,202,672**	**$ 13,891,569,978**
Net Present Value (NPV)		**$ 1,861,290,758**	**$ 3,427,289,467**	**$ 9,231,367,241**
Discount rate	**5.5%**			
Total Project Cost				**$ 215,930,000**
Return for Every Dollar Spent by All Parties				**$ 42.75**
Return for Every Dollar Spent by City of Cape Coral				**$ 170.36**

South Cape CRA

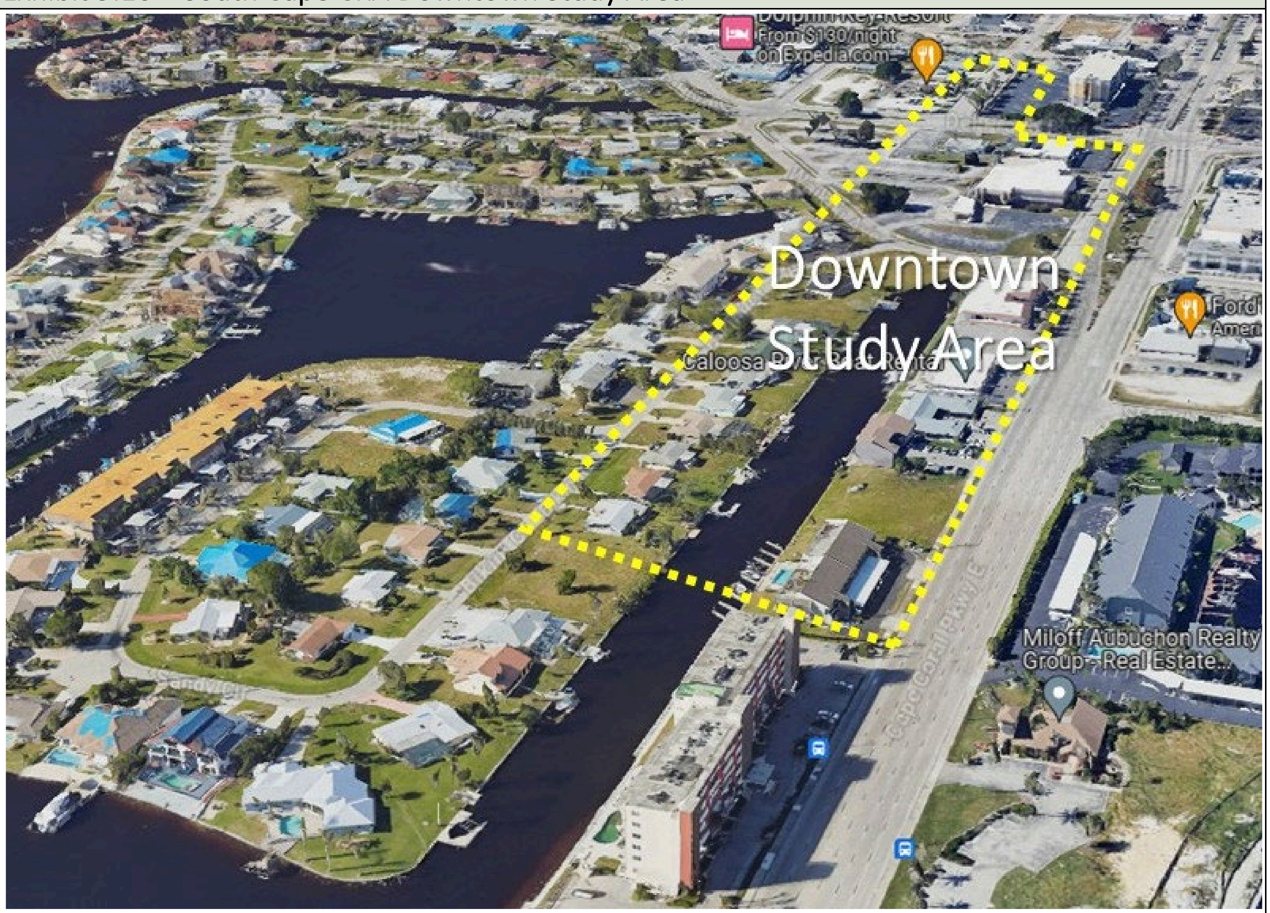
The Urban Land Institute's comments about the Downtown were as follows:

- A non-traditional downtown, seeking definition
- Created out of a linear pattern initially begun with entertainment, restaurant, and shopping uses
- Development proposals are in the works to add higher density housing in mixed-use formats
- Will need the arts, music, and cultural places and events to attract a city-wide audience

To meet those objectives, we recommend the development of a new multi-function Civic Center to be constructed on a visibly dominant downtown site that will serve as a landmark for visitors and residents alike in the CRA. We have identified a vacant group of properties at the corner of Cape Coral Pkwy. and Del Prado Blvd. S that are ideal for this project. The 5.8-acre assemblage will support a new Civic Center, and with the addition of a new parking garage across the street served by a raised pedestrian bridge above Del Prado Blvd. With the implementation of the Civic Center, the Downtown will have a signature location that will encourage ancillary development.

In support of the Civic Center, we envision a new waterfront Entertainment District to be developed along Cape Coral Pkwy, and the Norfolk Canal. A north and South Riverwalk-style esplanade containing shops, restaurants, and bars would add the missing tourism destination that Cape Coral is needing. A possible pedestrian foot bridge above the canal connecting the north and south Riverwalk would be a exciting component to the plan. A water taxi stop at the foot of the Norfolk Canal and the Civic Center would enhance the visitor experience. If successful, we can see the addition of a second hotel to the study area.

Exhibit 9.16 – South Cape CRA Downtown Study Area



Focus

To make this concept work, several parcels would need to be acquired. In our opinion, the use of eminent domain may not be feasible as an economic development initiative. However, the introduction of a non-profit public-private development corporation that can purchase existing lands and serve as equity partner would be a workable solution.

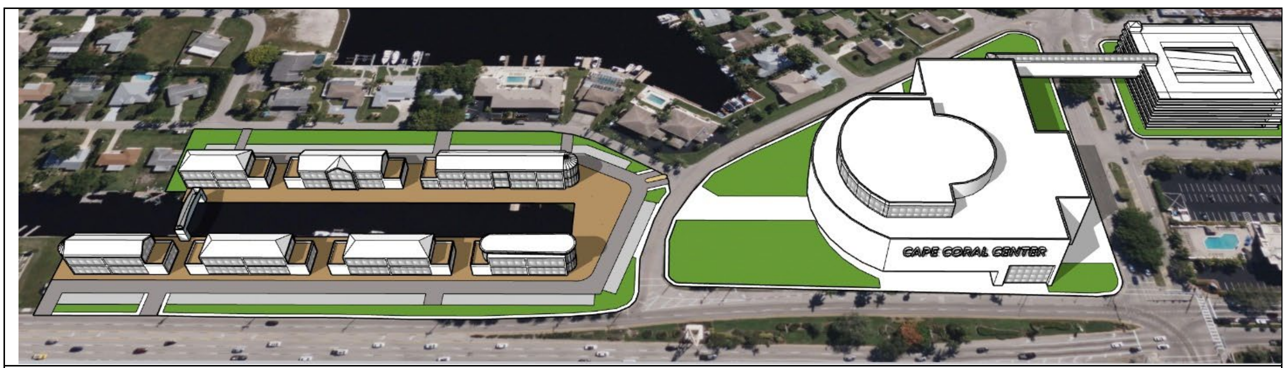
Exhibit 9.17 – South Cape CRA Downtown Parcels Assemblage

Parcel A -- 4.27 acres -- $4,200,000 market value (est.) -- Private ownership	Parcel B -- 0.61 acres -- $810,000 market value (est.) -- Private ownership	Parcel C -- 0.85 acres -- $529.000 market value (est.) -- Private ownership	Parcel D -- 0.67 acres -- $836,000 market value (est.) -- Private ownership
Parcel E -- 0.33 acres -- $144,000 market value (est.) -- Private ownership	Parcel F -- 0.34 acres -- $144,000 market value (est.) -- Private ownership	Parcel G -- 1.03 acres -- $1,731,000 market value (est.) -- Private ownership	Parcel H -- 0.35 acres -- $681,000 market value (est.) -- Private ownership
Parcel I -- 0.58 acres -- $1,183,000 market value (est.) -- Private ownership	Parcel J -- 0.46 acres -- $403,000 market value (est.) -- Private ownership	Parcel K -- 0.23 acres -- $536,000 market value (est.) -- Private ownership	Parcel L -- 0.23 acres -- $536,000 market value (est.) -- Private ownership
Parcel M -- 0.23 acres -- $535,000 market value (est.) -- Private ownership	Parcel N -- 0.23 acres -- $475,000 market value (est.) -- Private ownership	Parcel O -- 0.23 acres -- $587,000 market value (est.) -- Private ownership	Parcel P -- 0.23 acres -- $457,000 market value (est.) -- Private ownership
Parcel Q -- 0.33 acres -- $754,000 market value (est.) -- Private ownership	Parcel R -- 0.41 acres -- $822,000 market value (est.) -- Private ownership		

Downtown Civic Center & Entertainment District Concept

Exhibit 9.18 - Downtown Civic Center & Entertainment District Concept Plan

Overview

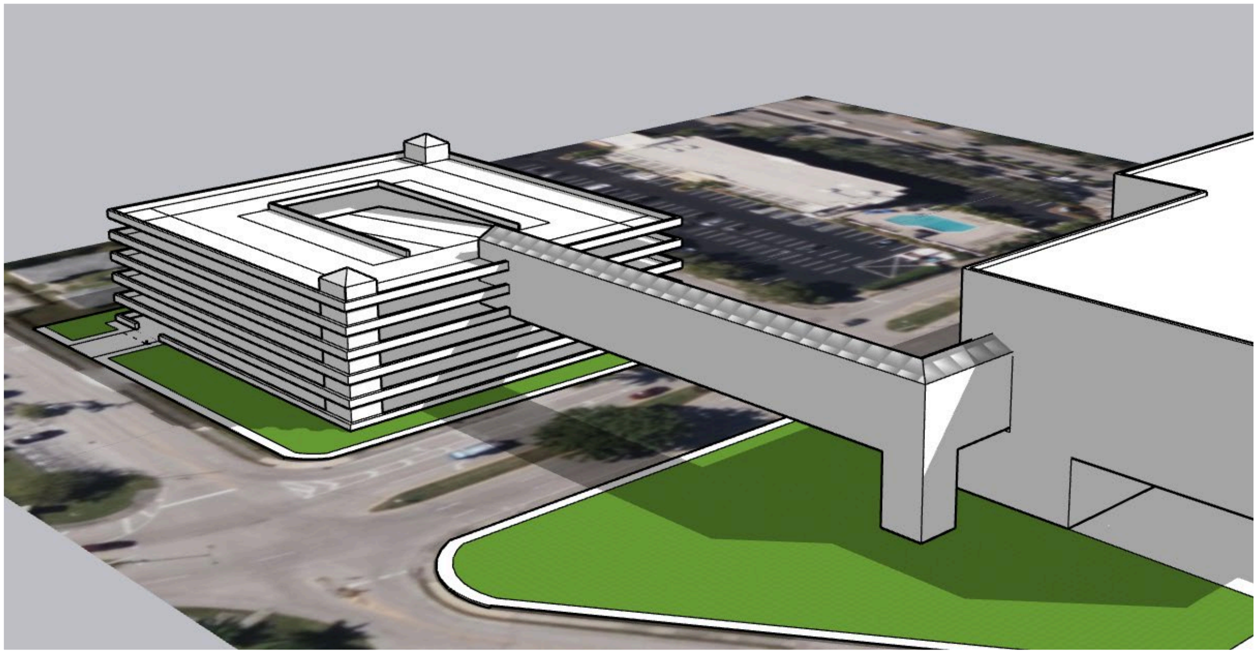


Aerial view from Cape Coral Pkwy. E

Cape Coral Center – Concept

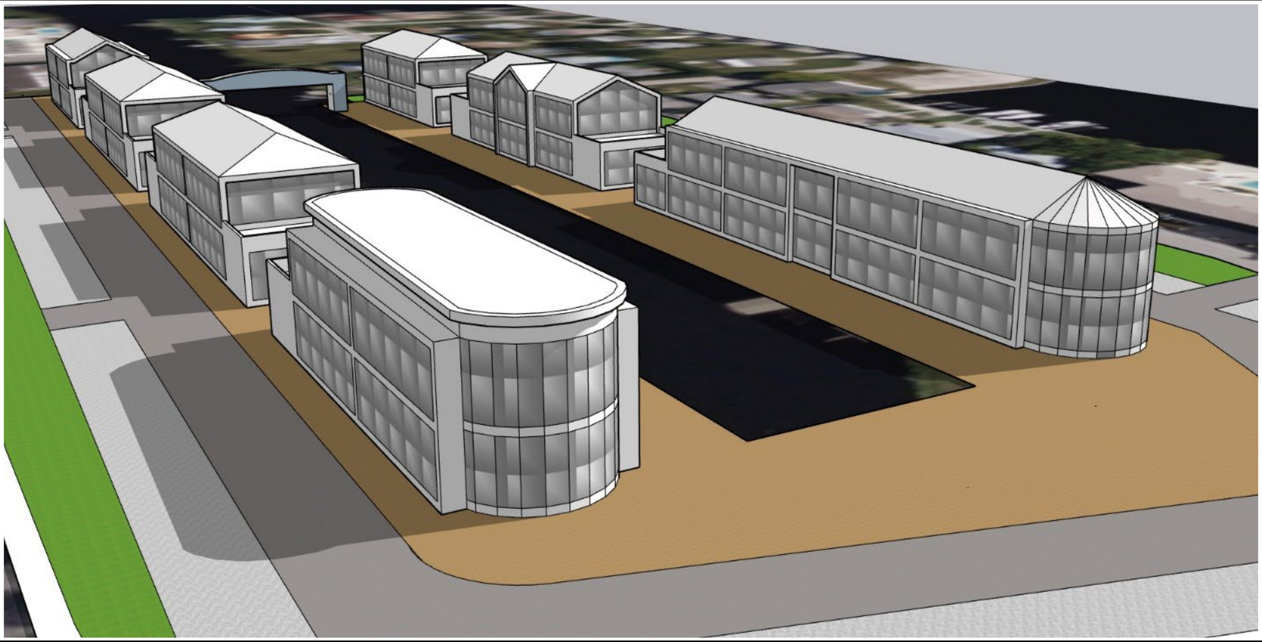
- Multi-function public space configured in a three-level signature building
- Ground level: **51,500** sf for entry, exhibition space, lounges, bar, loading dock, and storage
- Main level: **109,100** sf of multi-use open plan space configurable for sports, cultural, meeting, banquet, and theater space; pedestrian bridge connection to parking garage
- Mezzanine level: **35,80**0 sf of multi-function meeting space; administrative offices, and mechanical space
- Total building area: **196,400 sf**

Cape Coral Center Parking Garage & Pedestrian Bridge – Concept



- Six-level parking garage for self-service and valet service parking
- Raised pedestrian bridge for connection to Cape Coral Center - Main Level
- 740-space parking capacity for self -serve; higher for valet service
- Electric vehicle charging stations on each floor
- Total Number of Parking Spaces: **740** spaces

Entertainment District Buildings – Concept



- Multi-building Entertainment District providing restaurants, bars, and retail along canal waterfront, configured to allow maximum visibility from Cape Coral Parkway
- Esplanade with café-style seating and dock-and-dine tie ups for visiting boaters
- Upper-level balconies for outdoor dining overlooking esplanade below
- Main-level floor area: **51,400** sf in **7** buildings
- Upper-level floor area: **39,700** sf
- Total building area: **90,800** sf
- Total balcony space: **11,400** sf

Financial Analysis

Development analysis reveals that the Cape Coral Civic Center and Entertainment District will cost **$151,672,000**, segmented as follows:

Project Elements	Cost
Civic Center	$ 84,388,000
Parking Garage	$ 30,643,000
Pedestrian Bridge	$ 1,392,000
Subtotal City of Cape Coral Construction Costs	**$ 116,423,000**
Entertainment District Bldgs. (by Others)	**$ 19,886,000**
Total Construction cost	**$ 136,309,000**
Total Land Acquisition Costs	**$ 15,363,000**
Total Project Cost	**$ 151,672,000**

Refer to the Task 9 Appendices for detailed pro forma analysis of the Civic Center. Acquistion costs of the targeted parcels are estimated at **$15,363,000**.

Economic Impact Analysis

The Economic Impact Analysis (EIA) is provided in two parts.

Construction Impacts

The first is the construction impacts from a two-year period. It is assumed that the total **1,228**-person labor force will be utilized at 67% for the first year and then the remaining 33% for the second year. The overall impact will be **$143,354,853**, consisting of:

- **$68,886,220** for labor income
- **$72,912,426** value added directly to the City of Cape Coral's S GDP
- **$1,556,206** leakage to areas outside of Cape Coral

The table below illustrates these construction impacts:

Civic Center construction				
2024	**$ 84,388,000**	**Civic Center construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	776	$ 43,253,819	$ 44,456,268	$ 84,388,000
2 - Indirect	12	$ 758,707	$ 1,297,837	$ 2,658,744
3 - Induced	8	$ 401,079	$ 978,646	$ 1,530,129
Subtotal	**797**	**$ 44,413,606**	**$ 46,732,751**	**$ 88,576,872**
Parking Garage construction				
2024	**$ 30,643,000**	**Parking Garage construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	228	$ 12,872,511	$ 13,506,941	$ 30,643,000
2 - Indirect	6	$ 405,846	$ 709,341	$ 1,332,408
3 - Induced	3	$ 119,588	$ 291,789	$ 456,215
Subtotal	**237**	**$ 13,397,946**	**$ 14,508,071**	**$ 32,431,623**
Pedestrian Bridge construction				
2024	**$ 1,392,000**	**Pedestrian Bridge construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	10	$ 584,751	$ 613,571	$ 1,392,000
2 - Indirect	0	$ 18,436	$ 32,223	$ 60,526
3 - Induced	0	$ 5,432	$ 13,255	$ 20,724
Subtotal	**11**	**$ 608,620**	**$ 659,049**	**$ 1,473,251**

Entertainment District Buildings Construction (by Others)				
2024	**$ 19,886,000**	**Entertainment District Buildings construction**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	183	$ 10,192,746	$ 10,476,103	$ 19,886,000
2 - Indirect	3	$ 178,789	$ 305,835	$ 626,532
3 - Induced	2	$ 94,514	$ 230,618	$ 360,574
Subtotal	**188**	**$ 10,466,049**	**$ 11,012,555**	**$ 20,873,106**
Total Construction				
2024	**$ 136,309,000**	**Total project construction cost**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	1,197	$ 66,903,828	$ 69,052,883	$ 136,309,000
2 - Indirect	21	$ 1,361,778	$ 2,345,235	$ 4,678,210
3 - Induced	13	$ 620,614	$ 1,514,308	$ 2,367,643
Grand Total	**1,232**	**$ 68,886,220**	**$ 72,912,426**	**$ 143,354,853**

Operational Impacts

Operational impacts are determined by the revenue produced by the Civic Center and the tenant entertainment spaces. The analysis is presented in two parts:

<u>Civic Center Operational Impacts</u>

We will assume that the Civic Center hosts **100** events per year in its main space, and **50** events per year in its two ancillary areas. Revenue expectations of **$32,220,000** per year are as follows:

Operational Revenues	Per Event		Main Space	Ancillary Spaces	
	Main Space	Ancillary Spaces	100 events	50 events	Total
Food & Beverage	$ 115,300	$ 57,700	$ 11,530,000	$ 2,885,000	$ 14,415,000
Facility rental	$ 88,500	$ 44,300	$ 8,850,000	$ 2,215,000	$ 11,065,000
Event Services	$ 33,200	$ 16,600	$ 3,320,000	$ 830,000	$ 4,150,000
Other Revenue	$ 25,000	$ 12,500	$ 2,500,000	$ 625,000	$ 3,125,000
Parking	$ 3,700	$ 1,900	$ 370,000	$ 95,000	$ 465,000
Total			**$ 26,570,100**	**$ 6,650,050**	**$ 33,220,000**

Although the Civic Center is envisioned to be more oriented toward residents instead of tourism, it must be assumed that some visitor spending will occur from attendees of conferences or meetings. We project av figure of **10,000** attendees per year will be supported by the facility, staying an average **3** days in Cape Coral. Accordingly, visitor spending is as follows:

Visitor Expenditures	Per Day	3 days	10,000 attendees
Accommodations	180	$ 540	$ 5,400,000
Food/Entertainment	110	$ 330	$ 3,300,000
Rental car	65	$ 195	$ 1,950,000
Retail purchases	25	$ 75	$ 750,000
Total	**380**	**$ 1,140**	**$ 11,400,000**

Overall, **360** new jobs will be created and the total operational impact will be **$47,674,242** for the Civic Center, as shown below:

- **$16,181,660** for labor income
- **$25,934,552** value added directly to the City of Cape Coral's S GDP
- **$5,558,030** leakage to areas outside of Cape Coral

The table below shows these operational impacts for the Civic Center:

Food & Beverage				
2024	**$ 14,415,000 Food & Beverage revenue**			
Impact	Employment	Labor Income	GDP	Output
1 - Direct	168	$ 5,604,737	$ 9,272,169	$ 14,415,000
2 - Indirect	3	$ 134,679	$ 213,717	$ 475,217
3 - Induced	1	$ 40,355	$ 98,377	$ 153,808
Subtotal	**172**	**$ 5,779,770**	**$ 9,584,263**	**$ 15,044,025**
Facility rental				
2024	**$ 11,065,000 Facility rental revenue**			
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	40	$ 2,549,905	$ 3,633,023	$ 11,065,000
2 - Indirect	7	$ 391,406	$ 544,462	$ 1,658,656
3 - Induced	0	$ 22,277	$ 54,321	$ 84,930
Subtotal	**47**	**$ 2,963,587**	**$ 4,231,806**	**$ 12,808,586**
Event Services				
2024	**$ 4,150,000 Event Services revenue**			
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	26	$ 2,449,291	$ 2,531,311	$ 4,150,000
2 - Indirect	2	$ 79,920	$ 109,169	$ 217,654
3 - Induced	1	$ 24,361	$ 59,456	$ 92,962
Subtotal	**28**	**$ 2,553,572**	**$ 2,699,936**	**$ 4,460,616**

Other Revenue				
2024	**$ 3,125,000 Other revenue**			
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	18	$ 815,699	$ 1,261,940	$ 3,125,000
2 - Indirect	1	$ 44,360	$ 67,726	$ 132,870
3 - Induced	0	$ 5,893	$ 14,363	$ 22,456
Subtotal	**20**	**$ 865,951**	**$ 1,344,030**	**$ 3,280,326**
Parking				
2024	**$ 465,000 Parking revenue**			
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	7	$ 268,791	$ 334,188	$ 465,000
2 - Indirect	0	$ 3,983	$ 7,503	$ 16,661
3 - Induced	0	$ 4,638	$ 11,336	$ 17,725
Subtotal	**7**	**$ 277,412**	**$ 353,027**	**$ 499,386**
Accommodations				
2024	**$ 5,400,000 Accommodations revenue**			
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	39	$ 1,648,855	$ 3,723,641	$ 5,400,000
2 - Indirect	1	$ 60,076	$ 92,270	$ 177,283
3 - Induced	0	$ 12,118	$ 29,545	$ 46,193
Subtotal	**40**	**$ 1,721,049**	**$ 3,845,456**	**$ 5,623,477**
Food/Entertainment				
2024	**$ 3,300,000 Food/Entertainment revenue**			
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	34	$ 1,186,639	$ 1,801,873	$ 3,300,000
2 - Indirect	1	$ 44,025	$ 75,742	$ 164,112
3 - Induced	0	$ 9,047	$ 22,058	$ 34,488
Subtotal	**35**	**$ 1,239,711**	**$ 1,899,673**	**$ 3,498,599**
Rental car				
2024	**$ 1,950,000 Rental car revenue**			
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	4	$ 526,418	$ 1,672,947	$ 1,950,000
2 - Indirect	0	$ 11,679	$ 17,105	$ 31,803
3 - Induced	0	$ 4,485	$ 10,942	$ 17,108
Subtotal	**4**	**$ 542,582**	**$ 1,700,994**	**$ 1,998,911**
Retail purchases				
2024	**$ 750,000 Retail purchases revenue**			

Impact	Employment		Labor Income		GDP ValueAdded		Output
1 - Direct	7	$	230,777	$	261,123	$	429,043
2 - Indirect	0	$	5,450	$	9,859	$	24,416
3 - Induced	0	$	1,799	$	4,386	$	6,858
Subtotal	**7**	**$**	**238,025**	**$**	**275,369**	**$**	**460,317**
Total Operational							
2024	**$**	**44,620,000**	**Total Operational revenues**				
Impact	Employment		Labor Income		GDP ValueAdded		Output
1 - Direct	342	$	15,281,111	$	24,492,214	$	44,299,043
2 - Indirect	15	$	775,577	$	1,137,553	$	2,898,672
3 - Induced	3	$	124,972	$	304,786	$	476,528
Subtotal	**360**	**$**	**16,181,660**	**$**	**25,934,552**	**$**	**47,674,242**

Entertainment District Operational Impacts

For the Entertainment District, we will segment the overall **90,800** sf of building space into **3** equal components: Bars, Restaurants, and Retail. Revenue expectations per component is as follows:

- **$400** psf for Bars
- **$250** psf for Restaurants
- **$300** psf for Retail

There is an additional revenue expectation for special events to be held in the District (e.g., fashion shows pop-up retail events, outdoor concerts, etc.). The figure of **$1,500,000** annually will be utilized for this revenue item.

Revenue expectations of **$30,254,000** per year are as follows:

Component	Floor area sf	Revenue PSF	Total
Bars	30,267 sf	$400	$12,107,000
Restaurant	30,267 sf	$250	$7,567,000
Retail	30,267 sf	$300	$9,080,000
Subtotal	**90,800 sf**		**$28,754,000**
Special Events			$1,500,000
Total Revenue			**$30,254,000**

Overall, **325** new jobs will be created for the Entertainment District and the total operational impact will be **$27,842,877**, as shown below:

- **$11,501,732** for labor income
- **$16,715,400** value added directly to the City of Cape Coral's S GDP
- **$374,255** leakage from areas outside into Cape Coral

The table below shows these operational impacts for the Entertainment District:

Bars				
2024	**$ 12,107,000**	**Bars revenue**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	141	$ 4,707,357	$ 7,787,592	$ 12,107,000
2 - Indirect	3	$ 113,115	$ 179,499	$ 399,130
Accommodations	1	$ 33,894	$ 82,625	$ 129,182
Subtotal	**144**	**$ 4,854,366**	**$ 8,049,717**	**$ 12,635,311**
Restauarant				
2024	**$ 7,567,000**	**Restaurant revenue**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	78	$ 2,721,000	$ 4,131,748	$ 7,567,000
2 - Indirect	2	$ 100,950	$ 173,679	$ 376,313
3 - Induced	0	$ 20,745	$ 50,581	$ 79,081
Subtotal	**80**	**$ 2,842,695**	**$ 4,356,008**	**$ 8,022,395**
Retail				
2024	**$ 9,080,000**	**Retail revenue**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	88	$ 2,793,937	$ 3,161,330	$ 5,194,276
2 - Indirect	2	$ 65,981	$ 119,360	$ 295,594
3 - Induced	0	$ 21,775	$ 53,106	$ 83,030
Subtotal	**90**	**$ 2,881,693**	**$ 3,333,795**	**$ 5,572,900**
Special Events				
2024	**$ 1,500,000**	**Special Events revenue**		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	9	$ 885,286	$ 914,932	$ 1,500,000
2 - Indirect	1	$ 28,887	$ 39,459	$ 78,670
3 - Induced	0	$ 8,805	$ 21,490	$ 33,601
Subtotal	**10**	**$ 922,978**	**$ 975,881**	**$ 1,612,271**

Total Operational				
2024	$ 30,254,000	Total Operational revenue		
Impact	Employment	Labor Income	GDP ValueAdded	Output
1 - Direct	316	$ 11,107,580	$ 15,995,602	$ 26,368,276
2 - Indirect	7	$ 308,933	$ 511,996	$ 1,149,707
3 - Induced	2	$ 85,219	$ 207,802	$ 324,893
Subtotal	**325**	**$ 11,501,732**	**$ 16,715,400**	**$ 27,842,877**

Total Impacts

When combined, the total impacts for the Cape Coral Civic Center and Downtown Entertainment District will be measured over time, since construction will precede operations. In the table below, a 12-year timeline is presented, with the first 2 years representing the construction period, and the subsequent 10 years showing operations. Operations has a ramped utilization factor applied for 100% obtained over 4 years. The additive total impacts for the 12-year timeline is **$841,337,881.** However, since future money has a different value than present-day dollars, the Net Present Value (NPV) of the figure is needed. Utilizing the Federal Reserve's current **5.5%** discount rate, the NPV for the 12 years is **$598,934,660**. With the initial investment of **$151,146,000**, the Civic Center and Entertainment District will return approximately **$4** for each total dollar invested, making this concept a viable plan for the City. For the direct investment by the City, the return is just nearly **$7.** The following table illustrates the timeline:

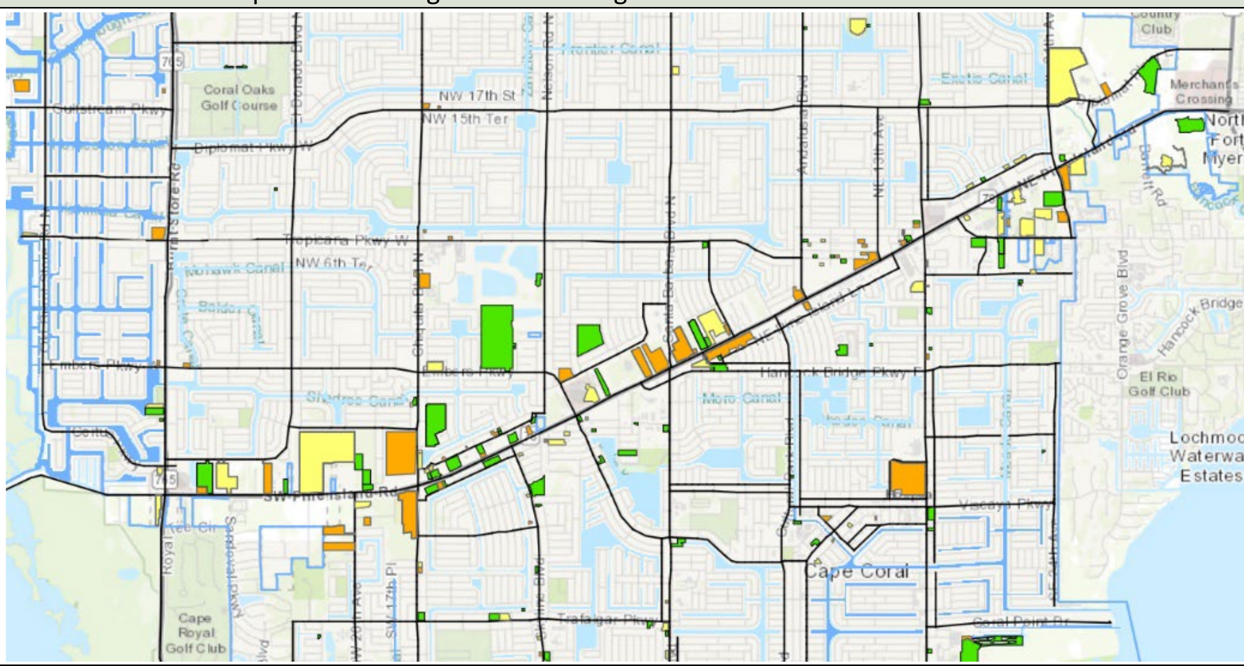
Timeline	Employment	Labor Income	GDP ValueAdded	Output
Yr. 1 - Construction	825	$ 34,443,110	$ 36,456,213	$ 71,677,426
Yr. 2 - Construction	406	$ 46,153,768	$ 48,851,326	$ 96,047,751
Yr. 3 - Operational Yr. 1	342	$ 13,841,696	$ 21,324,976	$ 37,758,560
Yr. 4 - Operational Yr. 2	459	$ 18,547,873	$ 28,575,468	$ 50,596,470
Yr. 5 - Operational Yr. 3	513	$ 20,762,544	$ 31,987,464	$ 56,637,839
Yr. 6 - Operational Yr. 4	685	$ 27,683,392	$ 42,649,952	$ 75,517,119
Yr. 7 - Operational Yr. 5	685	$ 27,683,392	$ 42,649,952	$ 75,517,119
Yr. 8 - Operational Yr. 6	685	$ 27,683,392	$ 42,649,952	$ 75,517,119
Yr. 9 - Operational Yr. 7	685	$ 27,683,392	$ 42,649,952	$ 75,517,119
Yr. 10 - Operational Yr. 8	685	$ 27,683,392	$ 42,649,952	$ 75,517,119
Yr. 11 - Operational Yr. 9	685	$ 27,683,392	$ 42,649,952	$ 75,517,119
Yr. 12 - Operational Yr. 10	685	$ 27,683,392	$ 42,649,952	$ 75,517,119
Grand Total	**1,916**	**$ 327,532,734**	**$ 465,745,114**	**$ 841,337,881**
Net Present Value (NPV)		**$ 237,134,377**	**$ 329,600,135**	**$ 598,934,660**
Discount rate	**5.5%**			

Total Project Cost	$ 151,146,000
Return for Every Dollar Spent by All Parties	$ 3.96
Return for Every Dollar Spent by City of Cape Coral	$ 6.91

Pine Island Road Corridor

Development along the Pine Island Road Corridor is continuing at a brisk pace. The area is acknowledged as the shopping district for Cape Coral and is the primary focus of developers. The graphic below illustrates the nearly **85** projects in varying levels of development approval in the corridor:

Exhibit 9.19 – Development Planning Activities along Pine Island Road Corridor

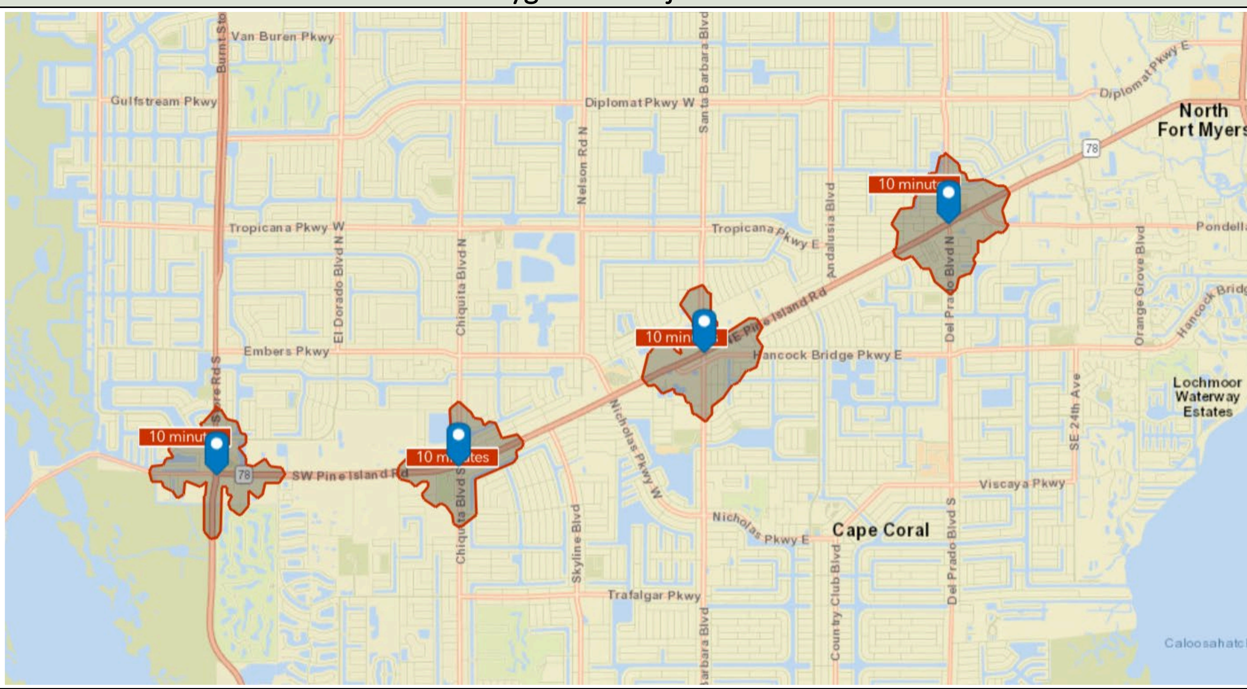


Retail, food service, and mixed-use housing represent the dominant drivers for the Pine Island Road Corridor, and mostly all available parcels have been devoted to that effort. Notable projects west of Chiquita Blvd. such as the Coral Grove Town Center will bring office development opportunities that may partially address the targeted industry focus for more professional and white-collar workers. The remaining larger acreage properties in this area belong to Lee Memorial Health or Walmart.

According to the SR 78/Pine Island Rd. Corridor Vision Plan, ongoing evaluation of safety improvements are being conducted. Recognition of traffic conditions that lead to crashes as well as protection for walking or bicycling pedestrians are being studied. Over-reliance on automobiles is the root cause for traffic issues, and making shopping destinations more interdimensional may provide the answer.

Traditional four-corner commercial infill provides for the convenience of inter-related activities of shopping, banking, dining, mailing or shipping, and more from a centralized location. Parking and walking to adjacent retail or services offers a “Main Street” experience that is lacking on the Pine Island Road corridor. Retail locations are too distant or separated to be convenient for foot traffic. In the graphic below, the four major intersections of Del Prado Blvd., Santa Barbara Blvd. Chiquita Blvd., and Burnt Store Rd. are illustrated with 10-minute walk-time polygons, showing the relative distances which separate these sites.

Exhibit 9.20 – 10-mInute Walk-Time Polygons at Major Intersections



According to ESRI, the density of existing businesses within each polygon decreases from east to west:

- **188** businesses - Del Prado Blvd.
- **149** businesses - Santa Barbara Blvd.
- **109** businesses - Chiquita Blvd.

- **4** businesses - Burnt Store Rd.

The goal should be to promote more business activity within comfortable walking distances. In total, there are **450** businesses within the four polygons. Using the median value of **129** businesses, we can see that both Del Prado and Santa Barbara are above the median density value, but both Chiquita and Burnt Store are below. Consequently, we would like to see efforts to promote at least **20** more businesses within the 10-minute walk zone at Chquita Blvd., and **125** new businesses in the area of the Burnt Store Rd. intersection. Through judicious use of smaller pad site development in large parking lots or parcels, smaller operations such as dry cleaners, coffee shops, or professional offices can be integrated into the larger properties but closer to the street lines and crossings.

Cape Coral Land Bank

In many of the project concepts presented in this study, the tactical outcomes will depend on acquisition of existing property, both commercial and residential. For transportation-related projects, the eminent domain process will allow the City Cape Coral condemnation powers, but for those elements of the strategy that may only be considered as economic development, the pathway is not as clear. In the landmark Kelo vs New London (2005) court case, the Supreme Court determined that economic benefits are a permissible form of public use that justifies the government in seizing property from private citizens. While this decision expanded municipal powers, its ramifications sparked a watershed of legal challenges afterward which has resulted in many communities to rethink how eminent domain is to be utilized.

One method that Florida communities utilize to achieve similar economic development goals is the creation of a Community Redevelopment Agency (CRA), such as in the South Cape area. CRA's require a significant degree of planning and legislation implementation to enact. Presently, there are over 220 CRAs in the State.

For Cape Coral, the large number of vacant pre-platted lots presents an interesting opportunity. By creation of a Land Bank, the goals of redevelopment can be met. The Land Bank legislation exists on Florida, although mainly focusing on affordable housing solutions. A Land Bank may also assemble properties for redevelopment, such as tax-delinquent or abandoned properties. They can also acquire properties to convert to other uses, such as retail, parks, or open space. The Center for Community Progress[10] lists five core powers that the Land Bank should possess:

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[10] Center for Community Progress; https://localhousingsolutions.org/housing-policy-library/land-banks/

- Obtain property at low or no cost through the property tax foreclosure process
- Clear title and/or extinguish back taxes on properties
- Hold land tax-free
- Lease properties for temporary uses
- Negotiate property sales based on community needs without seeking additional approvals from other levels of local government

We foresee the potential for a **Cape Coral Land Bank (CCLB)** that operates in cooperation with the City. It will function as a non-profit Public-Private Partnership (P3), with that objective of acquiring and holding prime vacant properties for transferring, reselling, or reinvesting in areas where the City would like to achieve economic development outcomes. If well-funded, the CCLB can act as equity partner in the speculative development projects led by the City, but also act independently such as acquire existing houses in key canal locations that will be re-purposed as future water taxi stops. The CCLB should be able to offer incentivized property swaps to current residents such as two-for one lot transfers or above market purchase allowances to encourage existing property owners to participate in deals that ultimately are dedicated to public good. Above all else, the core mission of the Cape Coral Land Bank must be the exercise of its responsibility to achieve positive economic development results for the City.

In the early stages while the CCLB is ramping up its programming, the City may need to cover the operating costs through annual budget appropriations, bonds or loans, or in-kind support suchj as shared staffing. The CCLB can use HOME[11] and CDBG[12] funding for certain activities if there is a plan in place for the property which includes a CDBG/HOME eligible end use (e.g. demolition and rehabilitation in target neighborhoods) within the time frame permitted by those programs. The City and the CCLB can coordinate philanthropic foundation grants and private sector donations from organizations interested in community development.

For more information on how land banks can be helpful for affordable housing solutions, please refer to Workforce Housing Concept white paper in the Task 9 Report Appendices.

[11] HOME – Home Investment Partnership Program (HUD)
[12] CDBG – Community Development Block Grants Program (HUD)

9.c – Task 9 Progress Report/video conference

We conducted a video conference with the Project Review Committee on September 30, 2024. Work product to date was discussed and the materials covered were previously uploaded to the website.

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Economic Development Strategic Plan - RCM2342AS

Task 10 Report

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10.a – Labor Force Analysis

Cape Coral Business Employment

In Task 3, a detailed analysis of Cape Coral employment was conducted where we identified **42,460** persons being employed by Cape Coral establishments. Data for this conclusion was extrapolated from the US Census. According to ESRI[1], there are **6,351** active businesses in Cape Coral and about a 90% correlation in total employment with the Census. Revisiting this data and ranking by the **20** categories of industry employment produces the following as shown in Exhibit 10.1 below:

Exhibit 10.1 – Cape Coral Business Employment by Industry Sector		
Industry	Estbs.	Empl.
Retail Trade	816	6,477
Health Care & Social Assistance	508	5,226
Accommodation & Food Services	393	5,033
Construction	966	3,974
Educational Services	108	3,489
Other Services (except Public Administration)	787	3,277
Real Estate, Rental & Leasing	488	2,958
Professional, Scientific & Tech Services	685	2,649
Public Administration	77	2,590
Administrative, Support & Waste Management Services	424	1,312
Finance & Insurance	294	1,109
Information	107	913
Manufacturing	155	910
Arts, Entertainment & Recreation	150	876
Wholesale Trade	170	865
Transportation & Warehousing	163	657
Management of Companies & Enterprises	37	62
Agriculture, Forestry, Fishing & Hunting	14	54
Utilities	5	18
Mining	4	12
Total	**6,351**	**42,460**

Source: Bureau of Labor Statistics (2023)

[1] ESRI - Cape Coral Business Summary 2023; Business Analyst; note: Unclassified businesses excluded

For each of the 20 industry categories of Cape Coral Business Employment, the following summarizes the major occupational groups that are most likely prevalent in each industry. The analysis is derived from the national patterns by industry applied to the local Cape Coral environment. While it is not possible to identify the exact numbers of local jobs by occupation in each industry, the analysis provides a reasonable estimate of employment makeup for each sector. Refer to the Task 10 Report Appendices Tables 10.a.1 thru 10.a.20 for more detail.

Retail Trade
Top **5** leading job categories: **5,496** jobs (**85%**)

- Sales and Related
- Transportation and Material Moving
- Office and Administrative Support
- Installation, Maintenance, and Repair
- Management

Health Care & Social Assistance
Top **5** leading job categories: **4,410** jobs (**84%**)

- Healthcare Practitioners and Technical
- Healthcare Support
- Office and Administrative Support
- Community and Social Service
- Management

Accommodation & Food Services
Top **5** leading job categories: **4,691** jobs (**93%**)

- Food Preparation and Serving Related
- Building and Grounds Cleaning and Maintenance
- Management
- Office and Administrative Support
- Sales and Related

Construction
Top **5** leading job categories: **3,596** jobs (**90%**)

- Construction and Extraction
- Office and Administrative Support
- Installation, Maintenance, and Repair
- Management
- Business and Financial Operations

Educational Services
Top **5** leading job categories: **2,765** jobs (**79%**)

- Educational Instruction and Library
- Office and Administrative Support
- Management
- Building and Grounds Cleaning and Maintenance
- Community and Social Service

Other Services (Ex. Pub. Admin.)
Top **5** leading job categories: **2,223** jobs (**68%**)

- Personal Care and Service
- Installation, Maintenance, and Repair
- Office and Administrative Support
- Transportation and Material Moving
- Management

Real Estate Rental and Leasing
Top **5** leading job categories: **2,388** jobs (**81%**)

- Sales and Related
- Installation, Maintenance, and Repair
- Management
- Office and Administrative Support
- Business and Financial Operations

Professional, Scientific & Tech Services
Top **5** leading job categories: **1,903** jobs (**72%**)

- Business and Financial Operations Business and Financial Operations
- Computer and Mathematical
- Office and Administrative Support

- Management
- Architecture and Engineering

Public Administration
Top **5** leading job categories: **1,677** jobs (**65%**)

- Educational Instruction and Library
- Office and Administrative Support
- Protective Service
- Business and Financial Operations
- Healthcare Practitioners and Technical

Administrative, Support & Waste Management Services
Top **5** leading job categories: **865** jobs (**66%**)

- Building and Grounds Cleaning and Maintenance
- Office and Administrative Support
- Transportation and Material Moving
- Protective Service
- Production

Finance & Insurance
Top **5** leading job categories: **1,070** jobs (**97%**)

- Office and Administrative Support
- Business and Financial Operations
- Sales and Related
- Management
- Computer and Mathematical

Information
Top **5** leading job categories: **677** jobs (**74%**)

- Computer and Mathematical
- Arts, Design, Entertainment, Sports, and Media
- Management
- Office and Administrative Support
- Sales and Related

Manufacturing
Top **5** leading job categories: **712** jobs (**78%**)

- Production
- Transportation and Material Moving
- Office and Administrative Support
- Management
- Architecture and Engineering

Arts, Entertainment & Recreation
Top **5** leading job categories: **598** jobs (**68%**)

- Personal Care and Service
- Food Preparation and Serving Related
- Office and Administrative Support
- Arts, Design, Entertainment, Sports, and Media
- Building and Grounds Cleaning and Maintenance

Wholesale Trade
Top **5** leading job categories: **678** jobs (**78%**)

- Transportation and Material Moving
- Sales and Related
- Office and Administrative Support
- Management
- Installation, Maintenance, and Repair

Transportation & Warehousing
Top **5** leading job categories: **618** jobs (**94%**)

- Transportation and Material Moving
- Office and Administrative Support
- Installation, Maintenance, and Repair
- Management
- Business and Financial Operations

Management Of Companies & Enterprises
Top **5** leading job categories: **51** jobs (**82%**)

- Business and Financial Operations
- Management
- Office and Administrative Support

- Computer and Mathematical
- Sales and Related

Agriculture, Fishing, Forestry & Hunting
Top **5** leading job categories: **49** jobs (**90%**)

- Farming, Fishing, and Forestry
- Transportation and Material Moving
- Office and Administrative Support
- Production
- Management

Utilities
Top **5** leading job categories: **13** jobs (**74%**)

- Installation, Maintenance, and Repair
- Office and Administrative Support
- Production
- Business and Financial Operations
- Management

Mining
Top **5** leading job categories: **10** jobs (**80%**)

- Construction and Extraction
- Transportation and Material Moving
- Installation, Maintenance, and Repair
- Management
- Office and Administrative Support

Cape Coral Business Employment Occupational Summary

Exhibit 10.2 (below) summarizes the estimated employment distribution of Cape Coral businesses by ranked major occupation category. The **5** leading categories represent **20,489** jobs or **48%** of the total local employment:

Exhibit 10.2 – Cape Coral Business Employment – Major Occupational Groups			
Occupations	Cape Coral 2022 Empl.	Empl. Distrib.	Rank
Sales and Related	**4,895**	**11.5%**	**1**
Office and Administrative Support	**4,788**	**11.3%**	**2**
Food Preparation and Serving Related	**4,697**	**11.1%**	**3**
Transportation and Material Moving	**3,069**	**7.2%**	**4**
Management	**3,040**	**7.2%**	**5**
Educational Instruction and Library	3,006	7.1%	6
Construction and Extraction	2,579	6.1%	7
Business and Financial Operations	2,373	5.6%	8
Healthcare Practitioners and Technical	2,316	5.5%	9
Installation, Maintenance, and Repair	2,293	5.4%	10
Healthcare Support	1,703	4.0%	11
Personal Care and Service	1,315	3.1%	12
Building and Grounds Cleaning and Maintenance	1,175	2.8%	13
Production	1,139	2.7%	14
Computer and Mathematical	1,133	2.7%	15
Community and Social Service	629	1.5%	16
Arts, Design, Entertainment, Sports, and Media	624	1.5%	17
Protective Service	616	1.5%	18
Architecture and Engineering	445	1.0%	19
Life, Physical, and Social Science	286	0.7%	20
Legal	272	0.6%	21
Farming, Fishing, and Forestry	66	0.2%	22
Cape Coral labor force	**42,460**	**100.0%**	
Subtotal - 5 Leading Major Occupational Groups	**20,489**	**48.3%**	

Cape Coral Resident Labor Force

Industry Employment

From the Task 2 Econographics section, the 2022 estimate for the City of Cape Coral was **102,700** persons. This figure is verified through evaluation of the US Census Zip Code Tabulations Areas (ZCTA) that comprise Cape Coral:

ZCTA	2022 Empl.
33904	14,826
33909	19,555
33914	22,510
33990	17,558
33991	12,271
33993	15,980
Total Cape Coral	**102,700**

The industries where Cape Coral workers are employed are show in Exhibit 10.3 (below). The 5 leading industries accounted for **56%** of total employment in the **19** sectors:

Exhibit 10.3 – Cape Coral Resident Labor Force by Industry Employment			
Industry	Cape Coral 2022 Emp.	Empl. Distrib.	Rank
Health care and social assistance	**16,696**	**16.3%**	**1**
Retail trade	**13,148**	**12.8%**	**2**
Construction	**11,340**	**11.0%**	**3**
Accommodation and food services	**8,398**	**8.2%**	**4**
Educational services	**8,121**	**7.9%**	**5**
Professional, scientific, and technical services	6,467	6.3%	6
Transportation and warehousing	6,241	6.1%	7
Administrative and support and waste management services	5,954	5.8%	8
Manufacturing	5,124	5.0%	9
Other services, except public administration	4,808	4.7%	10
Finance and insurance	4,617	4.5%	11
Public Administration	3,466	3.4%	12
Arts, entertainment, and recreation	2,591	2.5%	13
Real estate and rental and leasing	1,925	1.9%	14
Wholesale trade	1,775	1.7%	15
Information	924	0.9%	16

Agriculture, forestry, fishing and hunting	901	0.9%	17
Utilities	160	0.2%	18
Management of companies and enterprises	44	0.0%	19
Total	**102,700**	**100.0%**	
Subtotal 5 Leading Industries	**57,703**	**56.2%**	

As shown in Exhibit 10.4 (below), these persons were employed in **24** categories of occupations as defined by the Census. The **5** leading occupational groups accounted for **49%** of Cape Coral workers:

Exhibit 10.4 – Cape Coral Resident Labor Force by Major Occupational Group			
Occupations	Cape Coral 2022 Emp.	Occup. Distrib.	Rank
Sales and related	**13,343**	**13.0%**	**1**
Office and administrative support	**12,157**	**11.8%**	**2**
Management	**10,459**	**10.2%**	**3**
Food preparation and serving related	**7,104**	**6.9%**	**4**
Health diagnosing and treating practitioners and other technical	**6,991**	**6.8%**	**5**
Construction and extraction	6,680	6.5%	6
Transportation	5,593	5.4%	7
Building and grounds cleaning and maintenance	5,062	4.9%	8
Business and financial operations	4,720	4.6%	9
Educational instruction, and library	4,646	4.5%	10
Installation, maintenance, and repair	4,031	3.9%	11
Material moving	3,898	3.8%	12
Personal care and service	2,933	2.9%	13
Healthcare support	2,629	2.6%	14
Computer and mathematical	2,432	2.4%	15
Production	2,194	2.1%	16
Arts, design, entertainment, sports, and media	1,606	1.6%	17
Firefighting and prevention, and other protective service workers	1,446	1.4%	18
Architecture and engineering	1,354	1.3%	19
Legal	967	0.9%	20
Community and social service	948	0.9%	21
Law enforcement workers including supervisors	936	0.9%	22
Life, physical, and social science	379	0.4%	23
Farming, fishing, and forestry	194	0.2%	24
Cape Coral Resident Labor Force	**102,700**	**100.0%**	
Subtotal 5 Leading Major Occupational Groups	**50,053**	**48.7%**	

Wage Patterns

As developed for the Econographics section of Task 2 and shown in Exhibit 10.5 (below), Cape Coral workers are only marginally well paid in that there are wage advantages over the State of Florida averages in just **5** industries:

- Manufacturing
- Other services, except public administration
- Transportation and warehousing
- Construction
- Retail trade
- Administrative and support and waste management services

This is reinforced by the overall wage mean being **$2.06** per hour below the State if Florida average. There are wage disparities in **12** industries that indicate that indicate that economic conditions may be less than desirable:

- Utilities
- Professional, scientific, and technical services
- Wholesale trade
- Agriculture, forestry, fishing and hunting
- Information
- Finance and insurance
- Real estate and rental and leasing
- Arts, entertainment, and recreation
- Educational services
- Accommodation and food services
- Health care and social assistance
- Management of companies and enterprises

Exhibit 10.5 – Average Hourly Wage Comparison			
	Cape Coral Avg. hrly wage	State of FL Avg. hrly wage	Cape Coral Hrly. wage differential
Manufacturing	$38.87	$27.04	**$11.83**
Other services, except public administration	$23.44	$19.45	**$3.99**
Transportation and warehousing	$27.82	$24.16	**$3.66**

Construction	$25.94	$23.26	**$2.68**
Retail trade	$20.00	$18.98	**$1.02**
Administrative and support and waste management services	$20.46	$19.47	**$0.99**
Management of companies and enterprises	$45.15	$45.22	**-$0.07**
Health care and social assistance	$23.88	$24.60	**-$0.72**
Accommodation and food services	$14.33	$15.78	**-$1.45**
Educational services	$22.49	$24.16	**-$1.67**
Public administration	$28.28	$30.04	**-$1.77**
Arts, entertainment, and recreation	$17.63	$20.31	**-$2.68**
Real estate and rental and leasing	$21.22	$25.80	**-$4.58**
Finance and insurance	$28.23	$33.26	**-$5.03**
Information	$26.18	$31.54	**-$5.35**
Agriculture, forestry, fishing and hunting	$11.79	$17.74	**-$5.95**
Wholesale trade	$19.80	$27.24	**-$7.44**
Professional, scientific, and technical services	$24.88	$37.79	**-$12.90**
Utilities	$19.77	$34.34	**-$14.57**
Average hourly wages	$23.53	$25.59	**-$2.06**

Note: In the three major areas of Healthcare, Finance, and Professional services, a negative wage differential may signal an opportunity for corporate interests to consider Cape Coral as a location candidate based on operational savings potential in wages and salaries. Increasing employment in these key sectors will ultimately propel wages higher because of demand.

Commuting Characteristics of the Resident Labor Force

There is no specific means of determining how much of the resident labor force is employed by local businesses other than the US Census Commuting Patterns in the American Community Survey (ACS). For each of the six ZCTA's, the Commuting Outside Place of Residence is a percentage of the civilian labor force accounted for by area. According to the ACS, the following are the percentages of workers commuting outside place of residence:

- ZCTA 33904: 52.9%
- ZCTA 33909: 61.7%
- ZCTA 33914: 53.7%
- ZCTA 33990: 55.7%
- ZCTA 33991: 50.8%
- ZCTA 33993: 62.4%

By weighted averaging, **56.5%** of the Resident Labor Force, or nearly **58,000** workers are leaving Cape Coral daily to work elsewhere. Capture of a significant share of those workers must become a priority for the City going forward.

Cape Coral-Fort Myers MSA & Target Industries

While it is a worthwhile exercise to quantify the City's labor force by employer or resident, it is more important to recognize that prospective employers will hire from the entire region, notably the Cape Coral-Fort Myers Metropolitan Statistical Area (MSA). In Task 3, we identified the vital industries where the City is in below-average employment performance and how many new jobs should be targeted to bring Cape Coral to at least a parity level with the State. In that analysis, a **13,640**-person gain is the focus in the eight target industry clusters. A recap of that projection is shown on the table below:

Cluster	Pot'l. Empl. Gain
Community Services	3,927
Business & Financial Services	3,675
Healthcare & Life Sciences	3,378
Consumer Products & Services	1,430
IT & Media	770
Sustainable Real Estate	372
Industrial Services	256
Culinary Tourism	123
Total	**13,640**

To identify job training requirements, we have developed a process where each 4-digit NAICS industry within the targeted clusters have the requisite occupations as provided by the Bureau of Labor Statistics (BLS) listed in descending order of occurrence in each industry. For example, in NAICS 6241 - Individual and Family Services, we have projected the total employment to be **170** jobs. The following are the **15** leading occupations by percent which account for **84%** of the total (column 1):

		Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7
SOC	Job description	**Job %**	MSA Empl.	Est. avail. Empl.	Req'd Jobs	Positive jobs picture	Jobs Shortfall	Non-Reported in mSA
31-1120	Home Health and Personal Care Aides	**64.1%**	2,715	160	109	✓		
21-1093	Social and Human Service Assistants	**3.9%**	617	36	7	✓		
21-1021	Child, Family, and School Social Workers	**2.8%**	463	27	5	✓		
21-1018	Substance Abuse, Behavioral Disorder, and Mental Health Counselors	**2.3%**	566	33	4	✓		
11-9151	Social and Community Service Managers	**1.7%**	216	13	3	✓		
31-1131	Nursing Assistants	**1.4%**	2,673	158	2	✓		
29-1141	Registered Nurses	**1.3%**	6,570	388	2	✓		
43-9061	Office Clerks, General	**1.1%**	6,015	355	2	✓		
11-1021	General and Operations Managers	**1.0%**	6,283	371	2	✓		
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	**1.0%**	2,889	170	2	✓		
39-9099	Personal Care and Service Workers, All Other	**0.8%**	**0**	0	1		**1**	■
21-1022	Healthcare Social Workers	**0.8%**		19	1	✓		
21-1013	Marriage and Family Therapists	0.7%	82	5	1	✓		
39-9011	Childcare Workers	0.6%	545	32	1	✓		
39-9032	Recreation Workers	0.6%	740	44	1	✓		

In the next column (#2), the May 2023 MSA employment of each occupation is shown, followed then by the estimated number of potential new hires available in the marketplace (#3). These job estimates are calculated by applying the U6 underemployment figure of **5.9%** for the Cape Coral-Fort Myers MSA[2] against the current employment figure to arrive at estimated available labor. The required number of jobs in the next column (#4) are produced by applying the percentage of occupation occurrence against the total 170 job complement. If the jobs fulfillment picture looks positive (more applicants available than new hires required), a check mark appears in the next column (#5). If a job shortfall occurs, it is shown in the last column (#6), indicating that new

[2] U6 Unemployment Rate; The number of people who are unemployed, under-employed, are unemployed but have given up looking for work, or have temporarily left the workforce, as a percentage of the total civilian working population, equals the "real" or U-6 rate; U6 for Cape Croal-Fort Myers, FL MSA: 5.9%

training is required to meet the adequate occupation level. If the occupation is not reported by the BLS within the MSA, it is noted in Column #7. Job shortfalls are then summed for each industry.

At the end of this section, each of the eight target clusters have table summaries of the jobs target employment and shortfall training needs by NAICS industry. In total, the jobs shortfall for Cape Coral in the target clusters is **1,718** positions. Exhibit 10.4 (below) summarizes the jobs shortfall picture by ranking of **21** major occupations groups:

Exhibit 10.4 – Cape Coral Shortfall Jobs Summary

SOC	Major Occupational Group	Shortfall Jobs.	Jobs Distr.	Rank
33	Protective Service	430	25.0%	1
43	Office and Administrative Support	272	15.8%	2
29	Healthcare Practitioner and Technical	186	10.8%	3
19	Life, Physical, and Social Sciences	103	6.0%	4
51	Production	103	6.0%	4
41	Sales and Related	81	4.7%	5
53	Transportation and Material Moving	76	4.4%	6
31	Healthcare Support	70	4.1%	7
13	Business and Financial	69	4.0%	8
47	Construction and Extraction	60	3.5%	9
17	Architecture and Engineering	52	3.0%	10
21	Community and Social Services	45	2.6%	11
15	Computer and Mathematical	36	2.1%	12
23	Legal	35	2.0%	13
25	Educational Instruction and Library	28	1.6%	14
49	Installation, Maintenance, and Repair	27	1.6%	15
27	Arts, Design, Entertainment, Sports and Media	22	1.3%	16
11	Management	14	0.8%	17
45	Farming, Fishing and Forestry	5	0.3%	18
35	Food Preparation and Serving	3	0.2%	19
39	Personal Care and Service	1	0.1%	20
	Total Shortfall jobs	**1,718**	**100.0%**	

Community Services Cluster

Industry Cluster Overview			
NAICS	Industry	Target Empl.	MSA jobs Shortfall
6241	Individual and family services	170	1
6242	Community food and housing, and emergency and other relief services	50	0
6243	Vocational rehabilitation services	71	4
9100	Federal Government	713	126
9200	State Government	879	206
9300	Local Government	2,044	605
	Subtotal	**3,927**	**942**

Below are the top **10**-ranked occupational categories requiring training to fill needed positions. The subtotal of **626** jobs represents **66%** of the **942** total shortfall for this industry cluster:

SOC	Occupation	Shortfall Jobs	Jobs Dstrb.	Rank	Non-Reported in MSA
33-3051	Police and Sheriff's Patrol Officers	148	15.7%	1	
33-3012	Correctional Officers and Jailers	118	12.5%	2	
47-4051	Highway Maintenance Workers	55	5.8%	3	■
33-2011	Firefighters	47	5.0%	4	
53-3052	Bus Drivers, Transit and Intercity	47	5.0%	4	■
21-1092	Probation Officers and Correctional Treatment Specialists	34	3.6%	5	■
33-1012	First-Line Supervisors of Police and Detectives	31	3.3%	6	
43-4031	Court, Municipal, and License Clerks	25	2.7%	7	
43-4061	Eligibility Interviewers, Government Programs	25	2.7%	7	
33-1011	First-Line Supervisors of Correctional Officers	20	2.1%	8	■
43-4121	Library Assistants, Clerical	20	2.1%	8	■
43-5031	Public Safety Telecommunicators	20	2.1%	8	
33-3021	Detectives and Criminal Investigators	19	2.0%	9	
25-4031	Library Technicians	17	1.8%	10	■
Subtotal 10-Ranked Shortfall Occupations		**626**	**66.0%**		

Business & Financial Services Cluster

Industry Cluster Overview			
NAICS	Industry	Target Empl.	MSA jobs Shortfall
5221-3	Depository credit intermediation & Activites related	791	240
5222	Nondepository credit intermediation	62	0
5231	Securities and commodity contracts intermediation and brokerage	140	5
5411	Legal services	222	21
5416	Management, scientific, and technical consulting services	274	3
5611	Office administrative services	53	0
5612	Facilities support services	73	3
5613	Employment services	1,476	82
5614	Business support services	359	43
5616	Investigation and security services	142	0
5619	Other support services	83	3
	Subtotal	**3,675**	**400**

Below are the top **10** -ranked occupational categories requiring training to fill needed positions. The subtotal of **311** jobs represents **78%** of the **400** total shortfall for this industry cluster:

Occupational Shortfall Summary					
SOC	Occupation	Shortfall Jobs	Jobs Dstrb.	Rank	Non-Reported in MSA
43-3071	Tellers	104	26.0%	1	
41-3031	Securities, Commodities, and Financial Services Sales Agents	36	9.0%	2	
13-2072	Loan Officers	34	8.5%	3	
41-9041	Telemarketers	28	7.0%	4	■
51-2090	Miscellaneous Assemblers and Fabricators	25	6.3%	5	
51-9199	Production Workers, All Other	24	6.0%	6	
43-4131	Loan Interviewers and Clerks	23	5.8%	7	
43-4141	New Accounts Clerks	15	3.8%	8	■
23-1011	Lawyers	12	3.0%	9	
43-3011	Bill and Account Collectors	10	2.5%	10	
Subtotal Top 10-Ranked Shortfall Occupations		**311**	**77.8%**		

Healthcare & Life Sciences Cluster

Industry Cluster Overview			
NAICS	Industry	Target Empl.	MSA jobs Shortfall
5417	Scientific research and development services	127	26
6211	Offices of physicians	678	52
6212	Offices of dentists	22	0
6213	Offices of other health practitioners	14	0
6214	Outpatient care centers	103	0
6215	Medical and diagnostic laboratories	92	17
6216	Home health care services	302	16
6219	Other ambulatory health care services	106	9
6221	General medical and surgical hospitals	1515	155
6222	Psychiatric and substance abuse hospitals	45	4
6223	Specialty (except psychiatric and substance abuse) hospitals	83	1
	Subtotal	**3,087**	**280**

Below are the top **10**-ranked occupational categories requiring training to fill needed positions. The subtotal of **224** jobs represents **80%** of the **280** total shortfall for this industry cluster:

Occupational Shortfall Summary					
SOC	Occupation	Shortfall Jobs	Jobs Dstrb.	Rank	Non-Reportedin MSA
29-1141	Registered Nurses	88	31.4%	1	
31-9097	Phlebotomists	36	12.9%	2	■
19-1042	Medical Scientists, Except Epidemiologists	18	6.4%	3	■
31-1120	Home Health and Personal Care Aides	16	5.7%	4	
29-1126	Respiratory Therapists	9	3.2%	5	
29-1224	Radiologists	8	2.9%	6	■
29-1071	Physician Assistants	7	2.5%	7	
29-1249	Surgeons, All Other	6	2.1%	8	■
29-2055	Surgical Technologists	6	2.1%	8	
29-2034	Radiologic Technologists and Technicians	5	1.8%	9	
31-9093	Medical Equipment Preparers	5	1.8%	9	
29-1124	Radiation Therapists	4	1.4%	10	■
29-1215	Family Medicine Physicians	4	1.4%	10	
29-1218	Obstetricians and Gynecologists	4	1.4%	10	■
29-1223	Psychiatrists	4	1.4%	10	■
29-2032	Diagnostic Medical Sonographers	4	1.4%	10	
Subtotal Top 10-Ranked Shortfall Occupations		**224**	**80.0%**		

Consumer Products & Services Cluster

Industry Cluster Overview			
NAICS	Industry	Target Empl.	MSA jobs Shortfall
4231	Motor vehicle and motor vehicle parts and supplies merchant wholesalers	88	1
4234	Professional and commercial equipment and supplies merchant wholesalers	269	21
4236	Household appliances and electrical and electronic goods merchant wholesalers	42	0
4237	Hardware, and plumbing and heating equipment and supplies merchant wholesalers	44	0
4239	Miscellaneous durable goods merchant wholesalers	98	**0**
4411	Automobile dealers	372	0
4581	Clothing and clothing accessories retailers	80	0
4582	Shoe retailers	70	0
4591	Sporting goods, hobby, and musical instrument retailers	147	5
4592	Book retailers and news dealers	19	0
4593	Florists	18	3
4595	Used merchandise retailers	134	0
5321	Automotive equipment rental and leasing	49	0
	Subtotal	**1,430**	**30**

Below are the **9** occupational categories requiring training to fill needed positions. The subtotal of **30** jobs represents **100%** of the shortfall for this industry cluster:

Occupational Shortfall Summary					
SOC	Occupation	Shortfall Jobs	Jobs Dstrb.	Rank	Non-Reported in MSA
41-4011	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	12	40.0%	1	
49-9062	Shipping, Receiving, and Inventory Clerks	5	16.7%	2	
49-3091	Bicycle Repairers	4	13.3%	3	■
27-1023	Floral Designers	3	10.0%	4	
41-9031	Production, Planning, and Expediting Clerks	2	6.7%	5	■
17-2031	Electric Motor, Power Tool, and Related Repairers	1	3.3%	6	■
49-9063	Musical Instrument Repairers and Tuners	1	3.3%	6	■
49-9069	Billing and Posting Clerks	1	3.3%	6	■
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	1	3.3%	6	■
Total 9 Shortfall Occupations		**30**	**100.0%**		

IT & Media Cluster

Industry Cluster Overview			
NAICS	Industry	Target Empl.	MSA jobs Shortfall
5121	Motion picture and video industries	68	6
5122	Sound recording industries	7	1
5132	Software publishers	137	3
5161	Radio and television broadcasting stations	37	2
5162	Media streaming distribution services, social networks, and other media networks and content providers	45	0
5174-8	Telecommunications	3	0
5415	Computer systems design and related services	397	19
5418	Advertising, public relations, and related services	22	0
8112	Electronic and precision equipment repair and maintenance	43	2
	Subtotal	**770**	**33**

Below are the **10** occupational categories requiring training to fill needed positions. The subtotal of **33** jobs represents **100%** of the shortfall for this industry cluster:

Occupational Shortfall Summary					
SOC	Occupation	Shortfall Jobs	Jobs Dstrb.	Rank	Non-Reported in MSA
15-1252	Software Developers	12	36.4%	1	
27-1014	Special Effects Artists and Animators	4	12.1%	2	■
17-2061	Computer Hardware Engineers	3	9.1%	3	■
27-2011	Actors	3	9.1%	3	■
41-9031	Sales Engineers	3	9.1%	3	■
15-1221	Computer and Information Research Scientists	2	6.1%	4	■
27-3011	Broadcast Announcers and Radio Disc Jockeys	2	6.1%	4	
27-4014	Sound Engineering Technicians	2	6.1%	4	■
49-2097	Audiovisual Equipment Installers and Repairers	1	3.0%	5	■
49-9069	Precision Instrument and Equipment Repairers, All Other	1	3.0%	5	■
Total 10 Shortfall Occupations		**33**	**100.0%**		

Sustainable Real Estate Cluster

Industry Cluster Overview			
NAICS	Industry	Target Empl.	MSA jobs Shortfall
4233	Lumber and other construction materials merchant wholesalers	69	0
5311	Lessors of real estate & Activities related	97	0
5413	Architectural, engineering, and related services	206	17
	Subtotal	**372**	**17**

Below are the **12** occupational categories requiring training to fill needed positions. The total of **17** jobs represents **100%** of shortfall for this industry cluster:

Occupational Shortfall Summary					
SOC	Occupation	Shortfall Jobs	Jobs Dstrb.	Rank	Non-Reported in MSA
17-1011	Architects, Except Landscape and Naval	6	35.3%	1	
11-9041	Architectural and Engineering Managers	1	5.9%	2	
17-2011	Aerospace Engineers	1	5.9%	2	■
17-2061	Computer Hardware Engineers	1	5.9%	2	■
17-2081	Environmental Engineers	1	5.9%	2	■
17-3025	Environmental Engineering Technologists and Technicians	1	5.9%	2	■
17-3026	Industrial Engineering Technologists and Technicians	1	5.9%	2	■
17-3027	Mechanical Engineering Technologists and Technicians	1	5.9%	2	■
19-2031	Chemists	1	5.9%	2	■
19-2042	Geoscientists, Except Hydrologists and Geographers	1	5.9%	2	■
19-4031	Chemical Technicians	1	5.9%	2	■
19-4043	Geological Technicians, Except Hydrologic Technicians	1	5.9%	2	■
Total 12 Shortfall Occupations		**17**	**100%**		

Industrial Services Cluster

Industry Cluster Overview			
NAICS	Industry	Target Empl.	MSA jobs Shortfall
3327	Machine shops; turned product; and screw, nut, and bolt manufacturing	30	2
3328	Coating, engraving, heat treating, and allied activities	12	2
3329	Other fabricated metal product manufacturing	35	5
4235	Metal and mineral (except petroleum) merchant wholesalers	25	0
4238	Machinery, equipment, and supplies merchant wholesalers	89	**3**
4572	Fuel dealers	11	0
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	54	2
	Subtotal	**256**	**14**

Below are the **9** occupational categories requiring training to fill needed positions. The total of **14** jobs represents **100%** of the shortfall for this industry cluster:

Occupational Shortfall Summary					
SOC	Occupation	Shortfall Jobs	Jobs Dstrb.	Rank	Non-Reported in MSA
49-3041	Farm Equipment Mechanics and Service Technicians	3	21.4%	1	■
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	2	14.3%	2	■
51-4033	Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	2	14.3%	2	■
51-4193	Plating Machine Setters, Operators, and Tenders, Metal and Plastic	2	14.3%	2	■
49-9044	Millwrights	1	7.1%	3	■
49-9081	Wind Turbine Service Technicians	1	7.1%	3	■
51-4034	Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	1	7.1%	3	■
51-4081	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	1	7.1%	3	■
51-4111	Tool and Die Makers	1	7.1%	3	■
Total 9 Shortfall Occupations		**14**	**100.0%**		

Culinary Tourism Cluster

Industry Cluster Overview			
NAICS	Industry	Target Empl.	MSA jobs Shortfall
4452	Specialty food retailers	6	0
7223	Special food services	117	2
	Subtotal	**123**	**2**

Below are the **2** occupational categories requiring training to fill needed positions. The total of **2** jobs represents **100%** of the shortfall for this industry cluster:

	Occupational Shortfall Summary				
SOC	Occupation	Shortfall Jobs	Jobs Dstrb.	Rank	Non-Reported in MSA
35-9099	Food Preparation and Serving Related Workers, All Other	1	50%	1	■
35-2019	Cooks, All Other	1	50%	1	■
Total 2 Shortfall Occupations		**2**			

10.b – Job Training

Occupational Workforce Impacts

Broad-spectrum workforce educational requirements for occupational groups for the local business employment and resident labor force in each of the major employment groups are as follows:

Management

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	Bachelor's degree	1.	Less than 5 years	1.	None
2.	High school diploma or equivalent	2.	5 years or more	2.	Moderate-term on-the-job training
3.	Master's degree	3.	None	3.	Short-term on-the-job training
4.	Associate's degree				

Business and Financial

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	Bachelor's degree	1.	None	1.	None
2.	High school diploma or equivalent	2.	Less than 5 years	2.	Moderate-term on-the-job training
3.	No formal educational credential			3.	Long-term on-the-job training
4.	Postsecondary nondegree award			4.	Short-term on-the-job training

Computer and Mathematical

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	Bachelor's degree	1.	Less than 5 years	1.	None
2.	Master's degree	2.	5 years or more	2.	Moderate-term on-the-job training

3.	Associate's degree			3.	Long-term on-the-job training
4.	Some college, no degree				

Architecture and Engineering

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	Bachelor's degree	1.	None	1.	None
2.	Associate's degree			2.	Internship/residency
3.	High school diploma or equivalent			3.	Moderate-term on-the-job training

Life, Physical, and Social Sciences

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	Bachelor's degree	1.	None	1.	None
2.	Master's degree			2.	Moderate-term on-the-job training
3.	Associate's degree			3.	Internship/residency
4.	Doctoral or professional degree				
5.	High school diploma or equivalent				

Legal

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	Doctoral or professional degree	1.	None	1.	None
2.	Associate's degree	2.	5 years or more	2.	Moderate-term on-the-job training
3.	Bachelor's degree	3.	Less than 5 years	3.	Short-term on-the-job training
4.	High school diploma or equivalent				

Educational Instruction and Library

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	Doctoral or professional degree	1.	None	1.	None
2.	Bachelor's degree	2.	Less than 5 years		
3.	Master's degree	3.	5 years or more		
4.	Some college, no degree				
5.	Associate's degree				
6.	High school diploma or equivalent				
7.	Postsecondary nondegree award				

Arts, Design, Entertainment, Sports and Media

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	Bachelor's degree	1.	None	1.	None
2.	High school diploma or equivalent	2.	Less than 5 years	2.	Short-term on-the-job training
3.	No formal educational credential	3.	5 years or more	3.	Long-term on-the-job training
4.	Postsecondary nondegree award			4.	Moderate-term on-the-job training
5.	Associate's degree				
6.	Some college, no degree				

Healthcare Practitioner and Technical

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	Doctoral or professional degree	1.	None	1.	None
2.	Associate's degree	2.	Less than 5 years	2.	Internship/residency
3.	Master's degree			3.	Moderate-term on-the-job training
4.	Postsecondary nondegree award			4.	Long-term on-the-job training
5.	Bachelor's degree			5.	Short-term on-the-job training

6.	High school diploma or equivalent		

Healthcare Support

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	None
2.	Postsecondary nondegree award			2.	Short-term on-the-job training
3.	Associate's degree			3.	Moderate-term on-the-job training

Protective Service

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	Moderate-term on-the-job training
2.	Postsecondary nondegree award	2.	Less than 5 years	2.	Short-term on-the-job training
3.	No formal educational credential	3.	5 years or more	3.	None
4.	Bachelor's degree			4.	Long-term on-the-job training

Food Preparation and Serving

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	No formal educational credential	1.	None	1.	Short-term on-the-job training
2.	High school diploma or equivalent	2.	Less than 5 years	2.	None
3.	Postsecondary nondegree award	3.	5 years or more	3.	Moderate-term on-the-job training

Building and Grounds Cleaning and Maintenance

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	Short-term on-the-job training
2.	No formal educational credential	2.	Less than 5 years	2.	Moderate-term on-the-job training

Personal Care and Service

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	Short-term on-the-job training
2.	Postsecondary nondegree award	2.	Less than 5 years	2.	None
3.	No formal educational credential			3.	Moderate-term on-the-job training
4.	Associate's degree			4.	Long-term on-the-job training

Sales and Related

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	Moderate-term on-the-job training
2.	No formal educational credential	2.	Less than 5 years	2.	Short-term on-the-job training
3.	Bachelor's degree			3.	None

Office and Administrative Support

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	Short-term on-the-job training
2.	No formal educational credential	2.	Less than 5 years	2.	Moderate-term on-the-job training
3.	Associate's degree			3.	None

4.	Bachelor's degree			4.	Long-term on-the-job training
5.	Some college, no degree				

Farming, Fishing and Forestry

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	Moderate-term on-the-job training
2.	No formal educational credential	2.	Less than 5 years	2.	Short-term on-the-job training
3.	Bachelor's degree			3.	None

Construction and Extraction

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	Moderate-term on-the-job training
2.	No formal educational credential	2.	Less than 5 years	2.	Short-term on-the-job training
		3.	5 years or more	3.	Apprenticeship
				4.	Long-term on-the-job training
				5.	None

Installation, Maintenance, and Repair

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	Long-term on-the-job training
2.	Postsecondary nondegree award	2.	Less than 5 years	2.	Moderate-term on-the-job training
3.	Associate's degree			3.	Short-term on-the-job training
4.	Some college, no degree			4.	None
				5.	Apprenticeship

Production

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	Moderate-term on-the-job training
2.	No formal educational credential	2.	Less than 5 years	2.	Short-term on-the-job training
3.	Postsecondary nondegree award			3.	Long-term on-the-job training
				4.	None

Transportation and Material Moving

Typical education needed for entry (ranked)		Work experience in a related occupation (ranked)		Typical on-the-job training needed to attain competency in the occupation (ranked)	
1.	High school diploma or equivalent	1.	None	1.	Moderate-term on-the-job training
2.	No formal educational credential	2.	Less than 5 years	2.	Short-term on-the-job training
3.	Postsecondary nondegree award			3.	Long-term on-the-job training
				4.	None

The Issue of Workforce Readiness

Employer Survey Results

From Task 6 - Existing Business Development, the Employer Survey indicated that **35%** of employers felt that minor job training was needed for new hires. Most business owners (**53%**) felt that government-sponsored training might be of some possible value to their business. And, **56%** felt that hiring skilled workers was the most prevalent challenge. However, only **16%** remarked that subsidized training was needed.

The mixed picture of training being a need for businesses probably indicates that businesses are unaware of training opportunities. When asked if partnerships with local educational institutions would be important, an overwhelming **61%** said that such alliances could be valuable.

Target Industry Clusters

In total, the 1,718-job shortfall for the Cape Coral target clusters covers **202** occupations, with varying educational needs for entry, work experience in related occupation, and on-the-job training requirements. Refer to Appendix Table 10.b.9 for further detail on all 202 occupational categories. Exhibit 10.5 (below) illustrates a sampling of the occupations. The top **20**-ranked fields are denoted which cover **1,083** jobs or **64%** of the total shortfall.

Exhibit 10.5 – Top 20 Shortfall Occupations and Workforce Requirements

SOC	Occupation	# of Jobs	Rank	Non-Reported in MSA	Typical education needed for entry	Work experience in a related occupation	Typical on-the-job training needed to attain competency in the occupation
33-3051	Police and Sheriff's Patrol Officers	148	1		High school diploma or equivalent	None	Moderate-term on-the-job training
33-3012	Correctional Officers and Jailers	119	2		High school diploma or equivalent	None	Moderate-term on-the-job training
43-3071	Tellers	104	3		High school diploma or equivalent	None	Short-term on-the-job training
29-1141	Registered Nurses	88	4		Bachelor's degree	None	None
47-4051	Highway Maintenance Workers	55	5	■	High school diploma or equivalent	None	Moderate-term on-the-job training
33-2011	Firefighters	47	6		Postsecondary nondegree award	None	Long-term on-the-job training
53-3052	Bus Drivers, Transit and Intercity	47	6	■	High school diploma or equivalent	None	Moderate-term on-the-job training
31-9097	Phlebotomists	38	7	■	Postsecondary nondegree award	None	None
41-3031	Securities, Commodities, and Financial Services Sales Agents	36	8		Bachelor's degree	None	Moderate-term on-the-job training
13-2072	Loan Officers	34	9		Bachelor's degree	Less than 5 years	Moderate-term on-the-job training
21-1092	Probation Officers and Correctional Treatment Specialists	34	9	■	Bachelor's degree	None	Moderate-term on-the-job training

33-1012	First-Line Supervisors of Police and Detectives	31	10		High school diploma or equivalent	Less than 5 years	Moderate-term on-the-job training
41-9041	Telemarketers	28	11	■	No formal educational credential	None	Short-term on-the-job training
43-4031	Court, Municipal, and License Clerks	25	12		High school diploma or equivalent	None	Long-term on-the-job training
43-4061	Eligibility Interviewers, Government Programs	25	12		High school diploma or equivalent	None	Moderate-term on-the-job training
51-2090	Miscellaneous Assemblers and Fabricators	25	12		High school diploma or equivalent	None	Moderate-term on-the-job training
51-9199	Production Workers, All Other	24	13		High school diploma or equivalent	None	Moderate-term on-the-job training
43-4131	Loan Interviewers and Clerks	23	14		High school diploma or equivalent	None	Short-term on-the-job training
33-1011	First-Line Supervisors of Correctional Officers	21	15	■	High school diploma or equivalent	Less than 5 years	None
43-4121	Library Assistants, Clerical	20	16	■	High school diploma or equivalent	None	Short-term on-the-job training
43-5031	Public Safety Telecommunicators	20	16		High school diploma or equivalent	None	Moderate-term on-the-job training
19-1042	Medical Scientists, Except Epidemiologists	19	17	■	Doctoral or professional degree	None	None
33-3021	Detectives and Criminal Investigators	19	17		High school diploma or equivalent	Less than 5 years	Moderate-term on-the-job training
25-4031	Library Technicians	17	18	■	Postsecondary nondegree award	None	None
31-1120	Home Health and Personal Care Aides	16	19		High school diploma or equivalent	None	Short-term on-the-job training
43-4141	New Accounts Clerks	15	20	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-8031	Water and Wastewater Treatment Plant and System Operators	15	20		High school diploma or equivalent	None	Long-term on-the-job training
43-4141	New Accounts Clerks	15	20		High school diploma or equivalent	None	Moderate-term on-the-job training

51-8031	Water and Wastewater Treatment Plant and System Operators	15	20		High school diploma or equivalent	None	Short-term on-the-job training
	Subtotal	**1,093**					
	Non-reported in MSA		**294**				

Of the 202 occupations, the following table denotes the educational requirements by total numbers of jobs. For most jobs (**75%**), high school or bachelor's degrees are the most prevalent workforce requirements:

Educational Requirement	Jobs	Jobs Dstrb.
High school diploma or equivalent	906	52.7%
Bachelor's degree	391	22.8%
Postsecondary nondegree award	144	8.4%
Doctoral or professional degree	105	6.1%
Associate's degree	64	3.7%
Master's degree	55	3.2%
No formal educational credential	50	2.9%
Some college, no degree	3	0.2%
Total	**1,718**	**100.0%**

For the question of work experience in related fields, there would appear to be no overwhelming need:

Work experience in a related occupation	Jobs	Jobs Dstrb.
None	1,565	91.1%
Less than 5 years	134	7.8%
5 years or more	19	1.1%
Total	**1,718**	**100.0%**

On-the-job training requirements indicate that little to moderate training is the standard (**89%**):

Typical on-the-job training needed to attain competency in the occupation	Jobs	Jobs Dstrb.
Moderate-term on-the-job training	799	46.5%
None	473	27.5%
Short-term on-the-job training	261	15.2%
Long-term on-the-job training	126	7.3%
Internship/residency	56	3.3%

Apprenticeship	3	0.2%
Total	**1,718**	**100.0%**

From this analysis, we can deduce that there are no overarching educational or training demands for the types of jobs that Cape Coral should be pursuing to meet the target industry clusters employment objectives.

Missing as Non-Reported in MSA

The BLS reports jobs totals if present in a marketplace. For this analysis, we have denoted those occupations in the shortfall list that are not shown by BLS as occurring. Although there may be isolated instances where local knowledge may refute the BLS data, we are nevertheless bound to use this source as reliable as it is a federal publication.

In the Cape Coral-Fort Myers MSA, there are **131** occupations in our shortfall list that are not accounted for, which is a total of **657** jobs. These missing figures represent **38%** of the job total and **65%** of the occupations.

As educational attainment is the primary qualifier for these positions. The first list (below) shows the highest requirement of Doctoral or professional degree and ranked by numbers of missing jobs. For this category, **84** jobs in **17** occupations are missing from the MSA:

Occupations Requiring Doctoral or Professional degree		
SOC	Occupation	Jobs
19-4071	Medical Scientists, Except Epidemiologists	19
19-4099	Judges, Magistrate Judges, and Magistrates	10
53-2021	Radiologists	8
29-1124	Administrative Law Judges, Adjudicators, and Hearing Officers	6
17-3025	Surgeons, All Other	6
17-3026	Judicial Law Clerks	5
17-3027	Psychiatrists	5
19-4031	Obstetricians and Gynecologists	4
19-4043	Biochemists and Biophysicists	3
19-4044	Cardiologists	3
21-1092	Dermatologists	3
17-2061	Orthopedic Surgeons, Except Pediatric	3
19-2031	Physicists	2
19-3099	Neurologists	2
17-2081	Physicians, Pathologists	2
19-1031	Ophthalmologists, Except Pediatric	2

17-2011	Audiologists	1
	Total	**84**
	Total occupations	**17**

For the 2nd level requirements of Master's degrees, there are **10** occupations totaling **31** jobs that are unavailable:

Occupations Requiring Master's degrees		
SOC	Occupation	Jobs
41-9031	Computer and Information Research Scientists	6
11-9039	Healthcare Diagnosing or Treating Practitioners, All Other	6
19-1023	Statisticians	4
19-2042	Economists	4
19-2099	Epidemiologists	3
27-1014	Psychologists, All Other	3
19-1022	Counselors, All Other	2
29-1125	Anthropologists and Archeologists	1
33-3031	Political Scientists	1
45-2011	Nurse Midwives	1
	Total jobs	**31**
	Total occupations	**10**

For the 3rd level requirements of Bachelor's degrees, , there are **28** occupations totaling **126** jobs that need filling:

Occupations Requiring Bachelor's degrees		
SOC	Occupation	Jobs
17-1021	Probation Officers and Correctional Treatment Specialists	34
17-2031	Computer Hardware Engineers	8
17-2161	Chemists	8
19-1032	Social Scientists and Related Workers, All Other	8
19-2021	Environmental Engineers	7
19-4061	Conservation Scientists	6
23-1022	Aerospace Engineers	5
25-3011	Production, Planning, and Expediting Clerks	5
25-4013	Education Administrators, All Other	4
29-1128	Zoologists and Wildlife Biologists	4
53-2011	Geoscientists, Except Hydrologists and Geographers	4
19-1042	Physical Scientists, All Other	4

23-1023	Special Effects Artists and Animators	4
29-1224	Microbiologists	3
23-1021	Recreational Therapists	3
29-1249	Fish and Game Wardens	3
23-1012	Agricultural Inspectors	3
29-1223	Cartographers and Photogrammetrists	2
29-1218	Electric Motor, Power Tool, and Related Repairers	2
19-1021	Nuclear Engineers	1
29-1212	Foresters	1
29-1213	Atmospheric and Space Scientists	1
29-1242	Social Science Research Assistants	1
19-2012	Arbitrators, Mediators, and Conciliators	1
29-1217	Adult Basic Education, Adult Secondary Education, and English as a Second Language Instructors	1
29-1222	Museum Technicians and Conservators	1
29-1241	Exercise Physiologists	1
29-1181	Airline Pilots, Copilots, and Flight Engineers	1
	Total	**126**
	Total occupations	**28**

In the 4th level requirements of Associates' degrees, there are **10** occupations totaling **35** jobs that not fillable:

Occupations Requiring Associate's degrees		
SOC	Occupation	Jobs
47-4051	Forest and Conservation Technicians	9
53-3052	Life, Physical, and Social Science Technicians, All Other	6
33-1011	Air Traffic Controllers	6
43-4121	Radiation Therapists	4
43-4141	Environmental Engineering Technologists and Technicians	2
51-4081	Industrial Engineering Technologists and Technicians	2
43-4011	Mechanical Engineering Technologists and Technicians	2
31-1133	Chemical Technicians	2
33-3011	Geological Technicians, Except Hydrologic Technicians	1
51-4031	Hydrologic Technicians	1
	Total	**35**
	Total occupations	**10**

The observable result of this evaluation is that the MSA and likely Cape Coral in particular are weak in the depth of professional and technical personnel available to be utilized by the target industries and clusters. How this shortcoming is to be addressed is further discussed at the Conclusion of this report section.

BLS and State of Florida Growth Occupations

Both the Bureau of Labor Statistics (BLS) and the State of Florida project employment for ten-year periods. The Employment Projections (EP) from both sources provide the list of fastest-growing occupations. The following tables show the occupations from BLS on the national scale[3], the State of Florida[4], and the Southwest Florida Region[5]:

Fastest Growing - BLS		
49-9081	Wind turbine service technicians	Postsecondary nondegree award
29-1171	Nurse practitioners	Master's degree
15-2051	Data scientists	Bachelor's degree
15-2041	Statisticians	Master's degree
15-1212	Information security analysts	Bachelor's degree
11-9111	Medical and health services managers	Bachelor's degree
19-1041	Epidemiologists	Master's degree
29-1071	Physician assistants	Master's degree
31-2021	Physical therapist assistants	Postsecondary nondegree award
15-1252	Software developers	Bachelor's degree
31-2011	Occupational therapy assistants	Associate's degree
15-2011	Actuaries	Bachelor's degree
15-1221	Computer and information research scientists	Master's degree
15-2031	Operations research analysts	Bachelor's degree
47-2231	Solar photovoltaic installers	High school diploma or equivalent
31-1120	Home health and personal care aides	High school diploma or equivalent
53-3054	Taxi drivers	No formal educational credential
39-9099	Personal care and service workers, all other	High school diploma or equivalent
31-9096	Veterinary assistants and laboratory animal caretakers	High school diploma or equivalent
29-2056	Veterinary technologists and technicians	Associate's degree
35-2014	Cooks, restaurant	No formal educational credential
15-1253	Software quality assurance analysts and testers	Bachelor's degree

[3] Bureau of Labor Statistics; employment projectons; https://www.bls.gov/emp/tables.htm
[4] Florida Dept. of commerce; employment projections ; https://www.floridajobs.org/workforce-statistics/data-center/statistical-programs/employment-projections
[5] CareerSource Southwest; employment projections; https://www.floridajobs.org/workforce-statistics/data-center/statistical-programs/employment-projections

29-1131	Veterinarians	Doctoral or professional degree
13-2061	Financial examiners	Bachelor's degree
29-1127	Speech-language pathologists	Master's degree
25-1071	Health specialties teachers, postsecondary	Doctoral or professional degree
21-1018	Substance abuse, behavioral disorder, and mental health counselors	Bachelor's degree
31-9011	Massage therapists	High school diploma or equivalent
13-1081	Logisticians	Bachelor's degree
25-1072	Nursing instructors and teachers, postsecondary	Doctoral or professional degree

For the Statewide occupations:

Fastest Growing – FL Statewide		
29-1171	Nurse practitioners	Master's degree
15-2051	Data scientists	Bachelor's degree
29-1071	Physician assistants	Master's degree
15-1212	Information security analysts	Bachelor's degree
53-7053	Machine feeders and offbearers	No formal educational credential
15-1252	Software developers	Bachelor's degree
11-9111	Medical and health services managers	Bachelor's degree
31-2021	Physical therapist assistants	Associate's degree
25-1072	Nursing instructors and teachers, postsecondary	Doctoral or professional degree
53-3054	Taxi drivers	No formal educational credential

For the southwest region occupations:

Fastest Growing – CareerSource SouthWest		
29-1171	Nurse practitioners	Master's degree
13-1081	Logisticians	Bachelor's degree
11-9111	Medical and health services managers	Bachelor's degree
13-1161	Market research analysts & marketing specialists	Bachelor's degree
49-9041	Industrial machinery mechanics	High school diploma or equivalent
11-3031	Financial managers	Bachelor's degree
21-1018	Substance abuse, behavioral disorder, and mental health counselors	Master's degree
35-3023	Fast food & counter workers	No formal educational credential
11-9021	Construction managers	Bachelor's degree
53-7065	Stockers & order fillers	High school diploma or equivalent

When combined and edited for repeats, the three lists produce a group of **37** distinct fast-growing occupations as shown in Exhibit 10.6 (below):

Exhibit 10.6 – Combined lists - Fastest-Growing Occupations		
SOC	Occupation	Educ
11-3031	Financial managers	Bachelor's degree
11-9021	Construction managers	Bachelor's degree
11-9111	Medical and health services managers	Bachelor's degree
13-1081	Logisticians	Bachelor's degree
13-1161	Market research analysts & marketing specialists	Bachelor's degree
13-2061	Financial examiners	Bachelor's degree
15-1212	Information security analysts	Bachelor's degree
15-1221	Computer and information research scientists	Master's degree
15-1252	Software developers	Bachelor's degree
15-1253	Software quality assurance analysts and testers	Bachelor's degree
15-2011	Actuaries	Bachelor's degree
15-2031	Operations research analysts	Bachelor's degree
15-2041	Statisticians	Master's degree
15-2051	Data scientists	Bachelor's degree
19-1041	Epidemiologists	Master's degree
21-1018	Substance abuse, behavioral disorder, and mental health counselors	Bachelor's degree
25-1071	Health specialties teachers, postsecondary	Doctoral or professional degree
25-1072	Nursing instructors and teachers, postsecondary	Doctoral or professional degree
29-1071	Physician assistants	Master's degree
29-1127	Speech-language pathologists	Master's degree
29-1131	Veterinarians	Doctoral or professional degree
29-1171	Nurse practitioners	Master's degree
29-2056	Veterinary technologists and technicians	Associate's degree
31-1120	Home health and personal care aides	High school diploma or equivalent
31-2011	Occupational therapy assistants	Associate's degree
31-2021	Physical therapist assistants	Postsecondary nondegree award
31-9011	Massage therapists	High school diploma or equivalent
31-9096	Veterinary assistants and laboratory animal caretakers	High school diploma or equivalent
35-2014	Cooks, restaurant	No formal educational credential
35-3023	Fast food & counter workers	No formal educational credential
39-9099	Personal care and service workers, all other	High school diploma or equivalent
47-2231	Solar photovoltaic installers	High school diploma or equivalent
49-9041	Industrial machinery mechanics	High school diploma or equivalent
49-9081	Wind turbine service technicians	Postsecondary nondegree award
53-3054	Taxi drivers	No formal educational credential

53-7053	Machine feeders and offbearers	No formal educational credential
53-7065	Stockers & order fillers	High school diploma or equivalent

Crosswalk of the Fastest Growing Occupations and Target Clusters Shortfall Jobs

Exhibit 10.7 (below) compares the Fastest-growing occupations against the Target clusters shortfall jobs to determine commonalities and exceptions that could influence workforce training. The table summarizes the SOC descriptions into major groups, with the number of shortfall jobs appearing in the last column.

Exhibit 10.7 – Crosswalk of Fastest Growing Occupations and Target Clusters Jobs Shortfall

Fast-Growing Occupations	Major SOC Groups	Target Clusters Jobs Shortfall	# of Shortfall Jobs
	33	Protective Service	430
	43	Office and Administrative Support	272
Healthcare Practitioner and Technical	29	Healthcare Practitioner and Technical	186
Life, Physical, and Social Sciences	19	Life, Physical, and Social Sciences	103
	51	Production	103
	41	Sales and Related	81
Transportation and Material Moving	53	Transportation and Material Moving	76
Healthcare Support	31	Healthcare Support	70
Business and Financial	13	Business and Financial	69
Construction and Extraction	47	Construction and Extraction	60
	17	Architecture and Engineering	52
Community and Social Services	21	Community and Social Services	45
Computer and Mathematical	15	Computer and Mathematical	36
	23	Legal	35
Educational Instruction and Library	25	Educational Instruction and Library	28
Installation, Maintenance, and Repair	49	Installation, Maintenance, and Repair	27
	27	Arts, Design, Entertainment, Sports, and Media	22
Management	11	Management	14
	45	Farming, Fishing and Forestry	5
Food Preparation and Serving	35	Food Preparation and Serving	3
Personal Care and Service	39	Personal Care and Service	1
			1,718

From the above exhibit, there are **13** matches in occupational groups as follows:

- Healthcare Practitioner and Technical
- Life, Physical, and Social Sciences
- Transportation and Material Moving
- Healthcare Support
- Business and Financial
- Construction and Extraction
- Community and Social Services
- Computer and Mathematical
- Educational Instruction and Library
- Installation, Maintenance, and Repair
- Management
- Food Preparation and Serving
- Personal Care and Service

Conversely, there are **6** occupational groups that do not match to the fastest-growing categories:

- Protective Service
- Office and Administrative Support
- Architecture and Engineering
- Legal
- Arts, Design, Entertainment, Sports, and Media
- Farming, Fishing and Forestry

From this analysis, we can conclude that higher educational institutions are likely to be aware of the fastest-growing occupations and training is being adequately addressed in these areas. For the areas of mismatch, however, curriculum adjustments may not be that simple.

The Role of Higher Education Institutions

The forecasted shortfall of jobs in matched categories could be met by examination of current programs/majors and adding courses as necessary to fulfill these job growth requirements. We would encourage the OEBD to share our shortfall list of 1,718 jobs in 202 occupations as shown in Table 10 Appendices (Appendix Table 10.9) with the area colleges so that this correction be undertaken.

As delineated in Task 2, colleges within fifty miles of Cape Coral granted **12,891** degrees in 2022. A recap of the 10 most popular programs/majors for the Cape Coral institutions is shown in the table following:

Programs/Majors	2022 Total	Rank
Liberal Arts and Sciences, General Studies and Humanities	3,586	1
Health Professions and Related Programs	1,287	2
Business, Management, Marketing, and Related Support Services	967	3
Health Professions and Related Programs	743	4
Education	306	5
Multi/Interdisciplinary Studies	305	6
Psychology	298	7
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	254	8
Biological and Biomedical Sciences	189	9
Communication, Journalism, and Related Programs	180	10
Top 10 Most popular programs/majors degrees	**8,115**	
Top 10 Most popular programs/majors degrees by %	**82%**	

For the areas of mismatch, we do not see adequate attention applied to **architecture/engineering**, **legal**, and **visual/performing arts**. This conclusion is reinforced by the Task 2 comparison of Cape Coral area institutions versus the University of Florida. In that evaluation, key areas of weakness we noted in the following areas:

- Engineering
- Biological and biomedical sciences
- Social sciences
- Communication, journalism, and related Programs
- Computer and information sciences and support services
- Visual and performing arts
- Physical sciences

For Architecture and Engineering, the most sought-after degree is the Bachelor's degree. In Legal, it is the Doctoral/ or Professional. And, in Arts, Design, Entertainment, Sports and Media, it is again the Bachelor's degree. These 4 year-plus educational commitments might suggest the need for new university or college in Cape Coral. While this is a noble undertaking, it may not be necessary as online learning has become universally accepted over brick-and-mortar requirements.

US News and World Report annually publishes a ranking of the "best" online bachelor's degrees[6]. The **10** leading schools on the 2024 list are as follows:

- University of Buffalo-SUNY (1st)
- University of Florida (2nd)
- University of Illinois-Chicago (3rd)
- Arizona State University (tied for 4th)
- North Carolina State University (tied for 4th)
- Oregon State University (tied for 4th)
- Ohio State University (tied for 7th)
- Texas A&M University (tied for 7th)
- University of Central Florida (tied for 7th)
- University of North Carolina-Charlotte (tied for 7th)

Given that there are two Florida colleges on this list, the opportunity for online study is quite adequate for nearly all job requirements for the shortfall list. It is estimated the University of Florida's (UF) Online program has graduated over **4,000** students since the 2021–2022 academic year. Other institutions also offer associate and certificate degrees and awards that are suitable for those shortfall positions requiring such credentials.

Accordingly, unless there is a compelling reason to construct a new college in Cape Coral, we do not see the immediate need. A better idea would be to promote online learning as a cost-effective and reasonable alternative to expensive college education for working families. The OEBD should continue coordination with local higher education institutions in the area to expand course offerings in the shortfall curriculums so that a work-ready labor force can be utilized to successfully support the targeted industries and clusters.

Cape Coral Executive Corps

With the high number of retirees in Cape Coral from varied business backgrounds, there is the potential to develop teacher cadre similar to the Teach for America[7] (Teacher Corps) program currently active in Jacksonville, Miami, and Central Florida. An interview held with the Cape Coral Technical College director revealed the shortage of teachers in vocational education fields. We would recommend the active recruitment of retired executives and company owners who would care to help train the workforce for tomorrow. Afterwork and early evening classes for interested

[6] US Nes & World Report; Best Online Bachelor's Programs; https://www.usnews.com/education/online-education/bachelors/rankings
[7] Teach for America; https://www.teachforamerica.org/florida#teacher-corps-sites

persons could be held at the two library facilities in Cape Coral which have excellent training rooms available up to 190 persons each. The use of these facilities should also be encouraged for upskilling and lifelong learning applications.

A survey of current residents should be conducted to ascertain the numbers and experience level of volunteers who would participate. Although not official trained as educators, this corps of knowledgeable business leaders could undergo some very basic teaching training by the Cape Coral Technical College and then be paid by the City for lectures or seminars that they conduct.

We believe that becoming a member of the Executive Corps would be a celebratory achievement. The OEBD should create a plaque or award program to honor those individuals who will participate.

Business Incubators and Accelerators

The City of Cape Coral has effectively partnered with Florida Gulf Coast University's Small Business Development Center (SBDC) satellite office near City Hall by providing advisory services to startups. We believe, however, that a more direct effort should be enacted as a catalyst to the targeted industries and clusters.

<u>Business Incubators</u>

Incubators provide access to a shared physical space and networking opportunities with peers and experts across the full range of business disciplines. They are usually operated by nonprofit organizations that support businesses with slower, consistent growth over the long term.

<u>Business Accelators</u>

Business accelerators are programs that provide startup businesses with capital funding, expert mentorship and access to additional resources such as supply chain and manufacturing connections. Accelerators focus on rapid business growth and typically last three to six months. The programs offer their services in return for an equity stake in the business, generally between 4% and 10%, depending on the program.

<u>Cape Coral Startup Support Center</u>

We recommend the establishment of a Cape Coral startup support program that will operate as a hybrid between both types of programs. While the incubator component focuses on refining startup ideas and providing a supportive environment, the accelerator component will offer more structured, intensive programs to turn startups into scalable businesses. A suitable commercial space should be obtained for use and the program should be formed as a public-private-partnership between the OEBD and angel investors or venture capitalists. The objective will be the formation of new companies in the targeted clusters.

Conclusions

To reach the target goal of 13,640 new jobs in Cape Coral, recruitment from outside of the region is inevitable. While the capture of some portion of the 58,000 workers who leave the City each day, there is still a shortfall of 1,718 jobs. Some of these can be made up by enhancing graduation levels at local colleges and universities within the Cape Coral area or by online education. Other efforts such as business incubation and upskilling will prove effective. But there are occupations that simply are not present in the Cape-Coral-Fort Myer MSA that may need to be recruited until the labor force is more organically expanded through the education system.

OEBD should be aware of the shortfall jobs forecasted in this study can be addressed by active promotion regionally and nationally. A concerted effort should be made to seek professionals and specialists to consider Cape Coral as a new place to live, work and recreate. Attracting professional talent to a city is essential for economic growth and community vibrancy.

Some key strategies that are successfully employed in other cities to attract and retain talented individuals include:

Quality of Life Enhancement

- Highlight Cape Coral's unique lifestyle advantages. Showcase recreational opportunities, cultural amenities, green spaces, and a vibrant social scene.
- Emphasize work-life balance, affordable housing, and family-friendly environments.
- Promote outdoor activities, such as parks, trails, and waterfronts.
- Access to nature and recreational spaces appeals to professionals seeking a healthier lifestyle.

Financial Incentives and Relocation Programs

- Offer relocation incentives to professionals willing to move to Cape Coral. Programs like "Choose Topeka" in Kansas and similar initiatives in Tulsa, Oklahoma, provide financial incentives (up to $15,000) to attract talent. Highlight that residents can shape the city's future.
- Collaborate with local employers to create job placement programs for newcomers. Connecting talent with job opportunities enhances their willingness to relocate.

Digital Tools and Tech Infrastructure

- Leverage digital platforms to showcase Cape Coral's offerings. Use social media, websites, and virtual tours to highlight amenities, job opportunities, and community events.
- Invest in high-speed internet infrastructure. Professionals often seek cities with reliable connectivity for remote work and entrepreneurial ventures.

Education and Lifelong Learning

- Partner with educational institutions to offer lifelong learning opportunities. Workshops, seminars, and skill development programs attract professionals seeking continuous growth.
- Promote access to quality education for families. Good schools and universities are strong magnets for talent.

Cultural Diversity and Inclusion

- Celebrate diversity and create an inclusive environment. Professionals appreciate cities that embrace different cultures, languages, and traditions.
- Organize cultural events, festivals, and international food fairs. These foster connections and make the city more appealing.

Collaborate with Local Businesses and Startups

- Support entrepreneurship. Encourage startups and innovation hubs. Professionals are drawn to cities with a thriving entrepreneurial ecosystem.
- Create networking opportunities. Regular meetups, industry conferences, and business forums allow professionals to connect and exchange ideas.

Infrastructure and Transportation

- Invest in efficient public transportation. Professionals value easy commuting options.
- Develop walkable neighborhoods. Accessible urban areas with amenities close by are attractive to talent.

Attracting professional talent is not just about jobs. It is about creating an environment where people want to live, work, and contribute to the city's growth. By focusing on these strategies, Cape Coral can position itself as appealing destination for professionals.

10.c – Task 10 Progress Report/video conference

We conducted a video conference with the Project Review Committee on May 15, 2024. Work product to date was discussed and the materials covered were previously uploaded to the website.

Economic Development Strategic Plan - RCM2342AS

Volume 3 - Technical Report Appendices

prepared for:

City of Cape Coral Office of Economic and Business Development.

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December 2024

Acknowledgments

The Cape Coral Economic Development Strategic Plan is a comprehensive roadmap for achieving success in a uniquely challenging environment. Creation of the Strategy is not accomplished in a vacuum – there are many people and organizations that have provided valuable input to the process.

Our project team has been guided by the dedicated leadership of the Office of Economic and Business Development, the City Manager's Office, Development Services, Public Works, Communications, Information Technology Services, the Chamber of Commerce, the Lee County Visitor and Convention Bureau, and more.

We would like to thank Mayor Gunter, the City Council, and the especially the residents and businesses of Cape Coral, without whose unbiased and informative opinions and recommendations this work would not be possible.

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November 14, 2023

Cape Coral Economic Development Strategic Plan Kick-Off Meeting Table Notes

August 17, 2023 City Hall Room 220 1:00 PM

Max Forgey AICP*

Sharon Woodberry convened meeting.

Michael Ilczyszyn, Interim City Manager: Excited about project. CC is soon to be Florida's fifth largest city by population.

Bruce Hoch, DCG Corplan: Introduced team, including **Max Forgey** in attendance or on video conference: City is pushing ahead. BH did sector plan project for [unincorporated] North Fort Myers in 2017, so has familiarity with the area. Growth in Cape Coral has been phenomenal. You will have a built out population of 425-450 K based upon current entitlements. That is a city with the same population as Tampa and Tulsa; we have already surpassed Salt Lake City, which is not a small town. Demographics—older median age than most communities. The SWF draw—golf, boating, and delightful weather much of the year. There are environmental issues that can't be sugarcoated. BH's family started FANTUS Corp that did corporate site selection. Also an architect and planner. Has taken one company out of CC because they couldn't find the appropriate skills in the workforce. There are some young workers now. Environmental risks exist. Attended Resilient Lee Task Force today. Ready to move on; you should be proud of what you have achieved so far [Hurricane Ian recovery.] There's a social service dependency. Why CRA will or won't move forward. Visited area last night. Issues are interdependent. We may look for new town centers and we will require economic impact analysis. Our MSA, the old SMSA, now has 800.000 pop. Find the roadblocks and decide how to move forward. Have identified a 12-step process. **Alan Parter** (on monitor) from Key West is our tourism expert. **Rob DeRocker** in the red hat is our PR person. I was on TV this morning, will be on NBC affiliate tomorrow at 11:00. Melissa. Everything has to be implementable; public engagement is essential. Going to C of C meeting tonight. We've been listening carefully to the video of the ULI panel report. Not in complete agreement, and have participated in four of them myself, but they always raise some great points.

Max Forgey: It was a pleasure in the late '80s to be on the staff that wrote the first comprehensive plan for CC that included a Future Land Use Map, the ancestor of the ones that are on the wall in this room. CC is my home, and I intend to stay here. As we continue to grow, it's great to see the new leadership that can bring the city into a community of 425K. It's an honor to be a part of this team and I look forward to working with all of you.

Perseides Z: The first FLUM was very visionary. It even showed an airport on the north edge of the city.

MF: That was my old boss, Jay Aronstein's idea [1987/88]. When I was drawing the first draft with colored pencils, he told me to illustrate an airport and a community college on the fringe, just to get people thinking about the infrastructure that would be needed for a big city. Cape Coral has a robust planning tradition and our dual water system and reverse osmosis plant were on the vanguard of municipal services in their day. People flew in from Saudi Arabia to tour the RO plant.

Tom Slaughter: The platted lands experience. Keeping up with the game plan.

Alan Pater: Parter International. 30+ years' experience. Marketing, organizational structure. Tourism isn't separate from ED.

John D-H: 30 years in Key West. We've been unsuccessful in workforce housing. Do you need to repurpose land? Looking for options.

Rob: Apocalyptic if done poorly.

BH: Let's talk about project agenda:

- We'll have a working website, updated daily. Bookmark it.
- List of stakeholders.
- Progress updates, video conferencing.
- Won't be available to public for a while.
- Schedule—July 17th notice to proceed, but today is the real start date.
- In Broward County, we rented Conference Center for the final presentation. 800 attended. Would like to do that here.
- Re-examine local industry. Are vo tech and comm college meeting their workforce needs.
- Hurricane has provided an opportunity to rebuild. Where did our workforce come from?
- Survey—BH working on it next week.
- We'll need everybody's help.
- **Know the roadblocks**.
- NEXT YEAR—regular video conferences.
- About week 18—Business Roundtable.
- Week 50—PUBLIC PRESENTATION. Want this to be a public event.
- Marketing component is important. Do Linkedin.
- Need involvement from hospitals, vo tech, faith communities, for example.
- Outcome of ULI review.
- Labor force growing, but not in ideal way.

- Young worker shortage.
- E vs. P
- Manufacturing and tourism. Money from outside.
- Infrastructure, schools wont keep up unless we get the right industries.
- Res + Comm tax base.
- P/P partnerships.
- Development costs [as tool for channeling growth—the $33K nut for sewers.
- Offset? Captive insurance industry.
- We haven't created a city (yet).
- ULI report. What did you like, and not?

SW: Shock of how quickly buildout is coming. As soon as 11 to 18 years.

Chad Boyko: We will need buy-in from elected officials.

BH: Looking at ED literature. 191 hospital beds is not enough. May need 1000.

SW: Lee Memorial definitely.

BH: Today's workforce says "listen to us." One person I spoke to [Ralf Brookes] said that CC has a small business entrepreneurial spirit. 28% of workers today are "hybrid." I'm working from home myself. Prescott Valley AZ example. You may have to build a civic center, a regional park, or a river cruise. Possibly a Cape Harbor water taxi. Wayfinding in all four quadrants—Cape Coral is an easy place to get lost. Multimodal 78/Pine Island Road.

BH: Review committee. Video conference whenever possible. Public Works, Finance, Planning separately. Budget on-line. Capital improvement—Bill Corbin. How do you feel about a Chief Resiliency Officer? That was what ULI suggested. Everything will have a capital cost. Timelines. Incentives. Will explore CRA-TIF. Gut feeling—could be improved. {**MF aside—***Will give you a brief explanation of Lee County's 20/20 environmental land acquisition program, which is well funded, but has had trouble finding environmentally sensitive land in CC because it is so heavily platted. This may be an opportunity to shop for options.}*

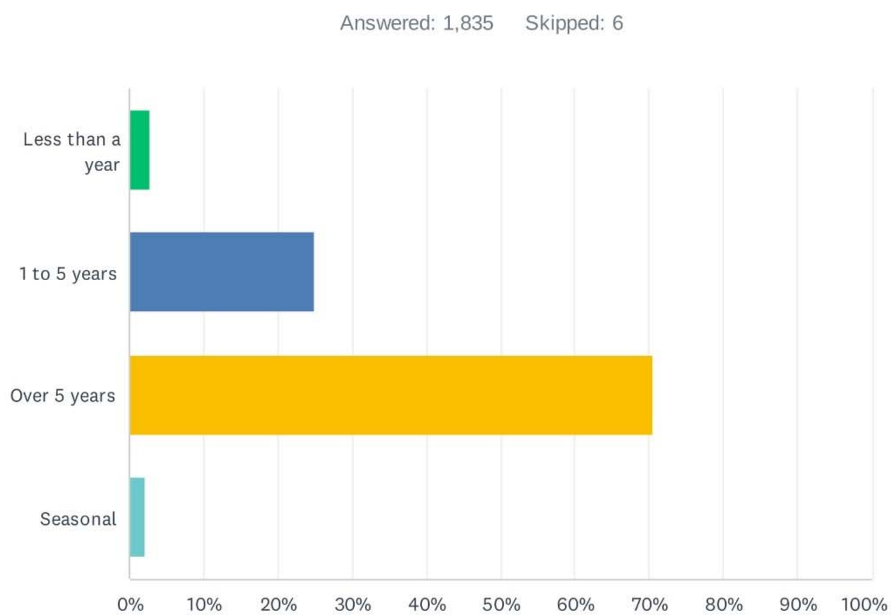
Do we want to be an urban environment?

- Louisville KY example
- South Dakota—credit card industry/ medical education.
- Institutions
- Homelessness
- Water in general

- GEICO regional center in Winter Haven
- Best things we've seen nationally
- Stakeholder group must have Health Care Representative
- Don't want to reinvent the wheel
- 10 QUESTIONS TOP!
- Academical Village

Analysis of Public Survey Results

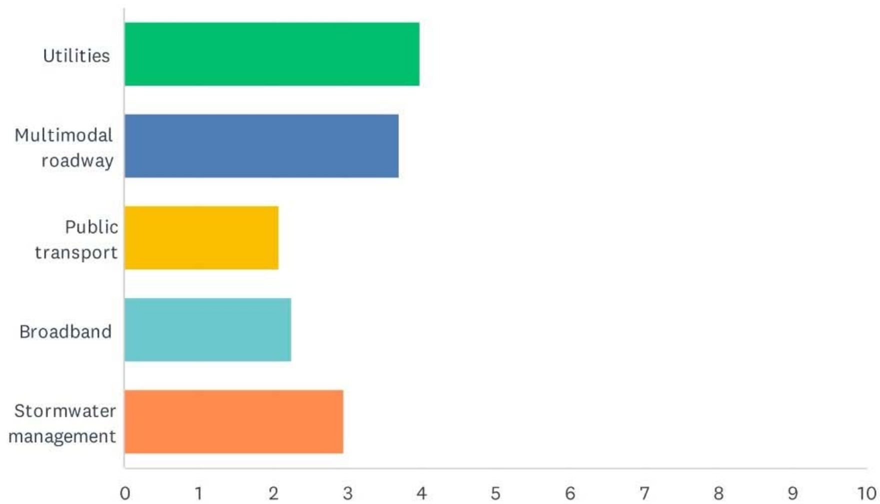
Q1. How long have you been a resident of Cape Coral, Florida?



ANSWER CHOICES	RESPONSES	
Less than a year	2.67%	49
1 to 5 years	24.90%	457
Over 5 years	70.68%	1,297
Seasonal	2.23%	41
Total Respondents: 1,835		

Q2. Which aspects of infrastructure do you think are most crucial for economic development in our area? Rank by priority of investment.

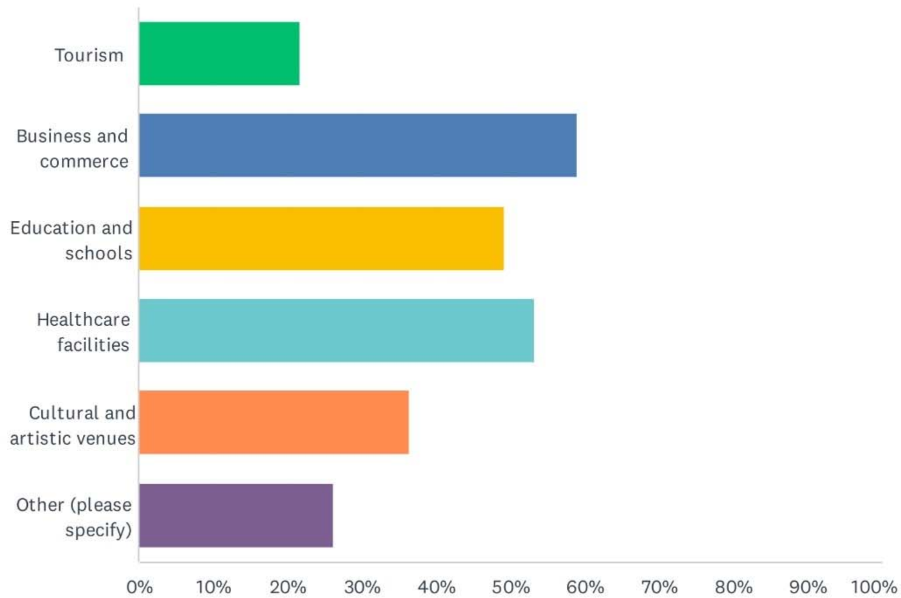
Answered: 1,830 Skipped: 11



	1	2	3	4	5	TOTAL	SCORE
Utilities	40.77% 746	31.53% 577	16.89% 309	7.60% 139	3.22% 59	1,830	3.99
Multimodal roadway	35.41% 648	25.52% 467	19.51% 357	13.55% 248	6.01% 110	1,830	3.71
Public transport	4.10% 75	9.78% 179	18.74% 343	24.64% 451	42.73% 782	1,830	2.08
Broadband	4.37% 80	9.95% 182	20.66% 378	36.50% 668	28.52% 522	1,830	2.25
Stormwater management	15.36% 281	23.22% 425	24.21% 443	17.70% 324	19.51% 357	1,830	2.97

Q3. Looking to the future, which areas should Cape Coral prioritize for development over the next decade? (Select up to three)

Answered: 1,835 Skipped: 6

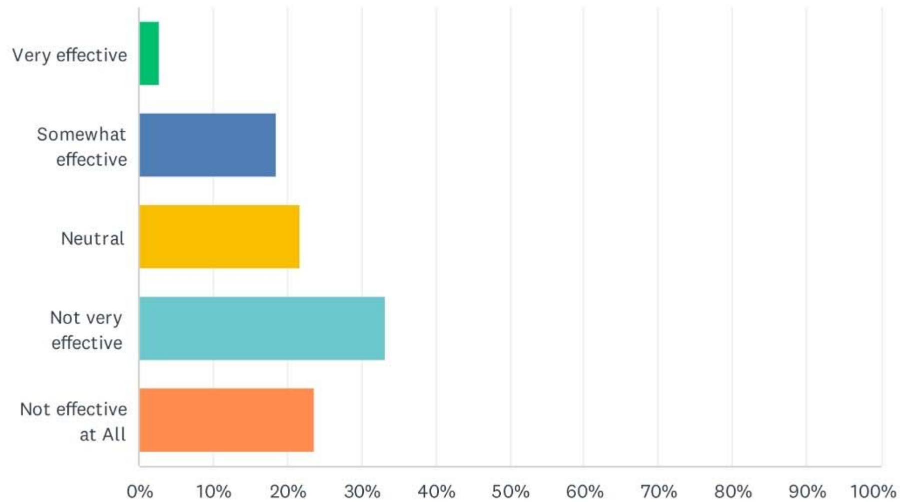


ANSWER CHOICES	RESPONSES	
Tourism	21.85%	401
Business and commerce	58.96%	1,082
Education and schools	49.32%	905
Healthcare facilities	53.35%	979
Cultural and artistic venues	36.51%	670
Other (please specify)	26.21%	481

Total Respondents: 1,835

Q4. How would you rate the effectiveness of local government in addressing community concerns?

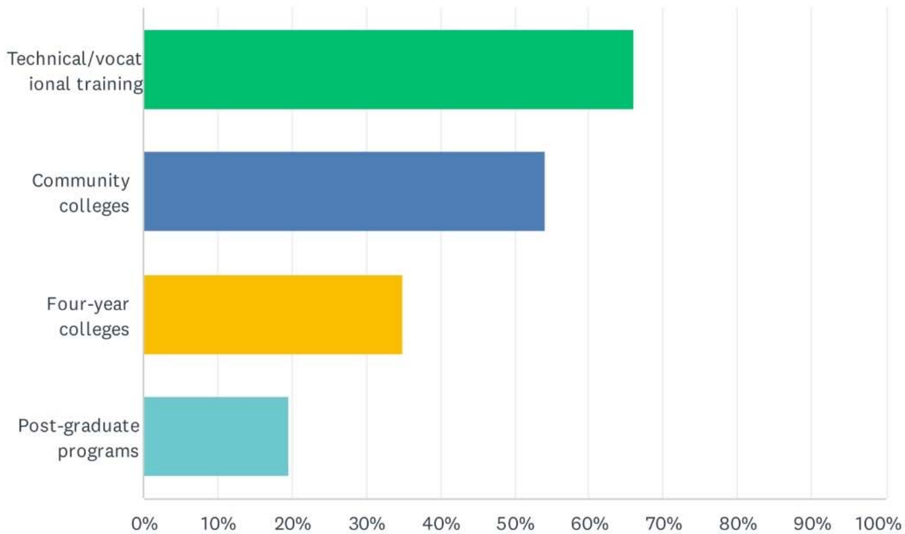
Answered: 1,837 Skipped: 4



ANSWER CHOICES	RESPONSES	
Very effective	2.78%	51
Somewhat effective	18.45%	339
Neutral	21.77%	400
Not very effective	33.32%	612
Not effective at All	23.68%	435
TOTAL		1,837

Q5. At present, the City of Cape Coral has only one college. What forms of higher education do you think the city currently lacks? (Select any that apply)

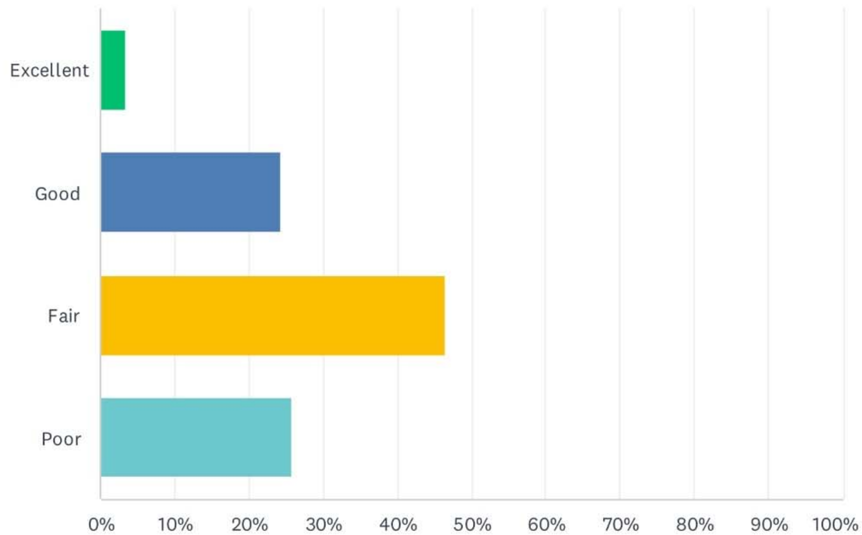
Answered: 1,777 Skipped: 64



ANSWER CHOICES	RESPONSES	
Technical/vocational training	66.07%	1,174
Community colleges	54.14%	962
Four-year colleges	34.89%	620
Post-graduate programs	19.53%	347
Total Respondents: 1,777		

Q6. How would you rate the employment opportunities in Cape Coral?

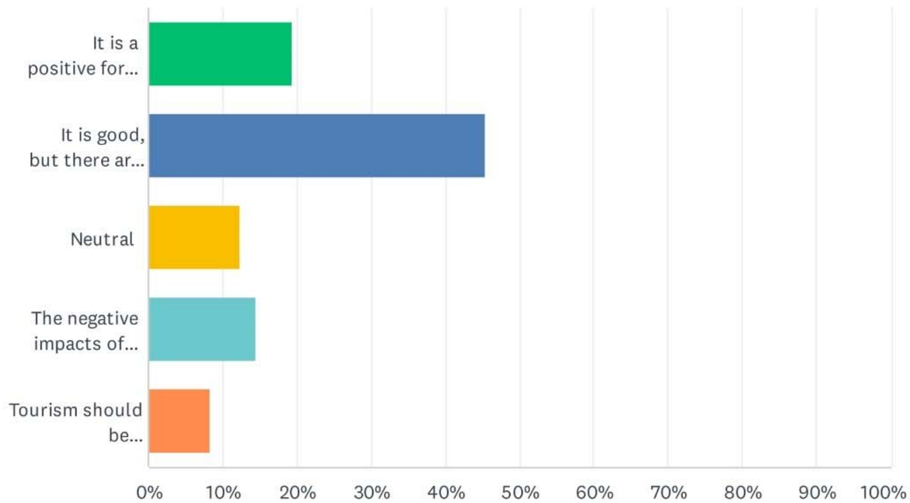
Answered: 1,826 Skipped: 15



ANSWER CHOICES	RESPONSES	
Excellent	3.34%	61
Good	24.21%	442
Fair	46.55%	850
Poor	25.90%	473
TOTAL		1,826

Q7. What is your opinion about the current state of tourism and its impact on Cape Coral?

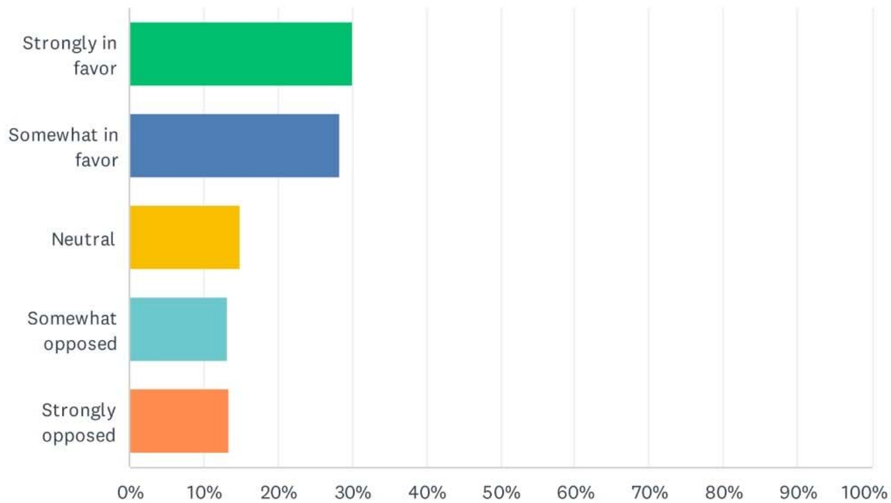
Answered: 1,838 Skipped: 3



ANSWER CHOICES	RESPONSES	
It is a positive force for the economy and should be promoted further	19.31%	355
It is good, but there are some negative impacts that need to be managed	45.43%	835
Neutral	12.40%	228
The negative impacts of tourism currently outweigh the benefits	14.58%	268
Tourism should be significantly reduced or better controlled	8.27%	152
TOTAL		1,838

Q8. Are you in favor of more downtown development projects in Cape Coral?

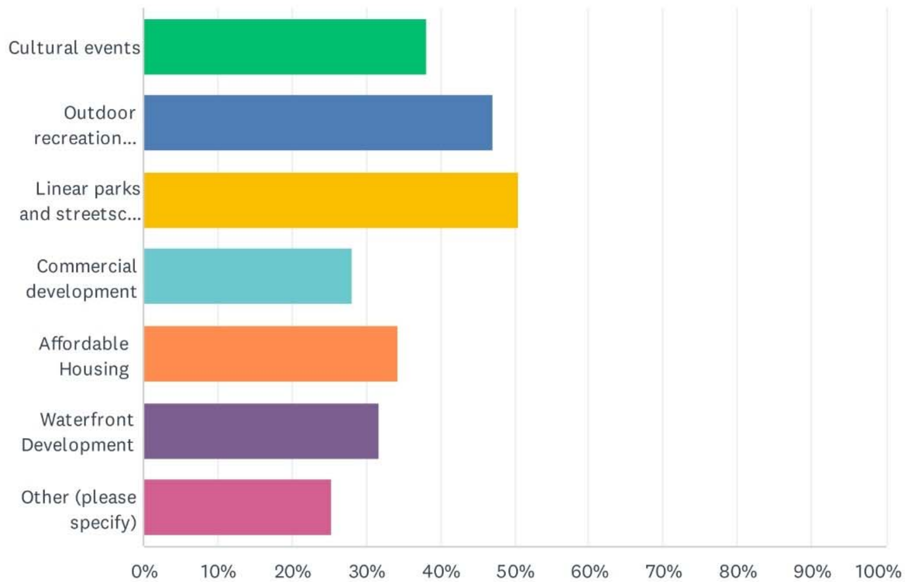
Answered: 1,838 Skipped: 3



ANSWER CHOICES	RESPONSES	
Strongly in favor	30.03%	552
Somewhat in favor	28.40%	522
Neutral	14.91%	274
Somewhat opposed	13.17%	242
Strongly opposed	13.49%	248
TOTAL		1,838

Q9. In the future, what would you like to see more of in Cape Coral? (Select up to three)

Answered: 1,836 Skipped: 5



ANSWER CHOICES	RESPONSES	
Cultural events	38.24%	702
Outdoor recreation opportunities	47.11%	865
Linear parks and streetscape beautification	50.60%	929
Commercial development	28.05%	515
Affordable Housing	34.26%	629
Waterfront Development	31.81%	584
Other (please specify)	25.33%	465
Total Respondents: 1,836		

Q10. Please provide any additional comments or concerns you may have about Cape Coral and its future direction. Feel free to explain any of your answers to the questions above.

Answered: 1,248 Skipped: 593

#	RESPONSES
1	Need more multi use paths or dedicated bicycle lanes. Need more sidewalks
2	Please put nature and wildlife first
3	We need an overall of city council. We have a high end home builder . Another councilmen works for Aubuchon Realty, high end home builder and real estate developer they want to develop everywhere. Another council member owns Palm Tree farms on Pine Island. I am nor quite sure how ethical this is to have them voting on issues and projects in the Cape , that could possibly benefit them financially. Seems like a conflict of interest. Redfish Pointe is a prime example. Let's work for the whole city,, not a few. We need more sports complexes and green space for our future.. I am not sure how ethical this is to have them voting on the projects and issues at hand. . We do not need anymore 650 unit apartment complexes, or storage units.Our infrastructure is a mess.Now they want to develop Redfish point. Lets nor worry about our wetlands that help protect us during major storms.. We are already filling in canals to build car washes. When is enough , enough? I have been to many cory council meetings. There is a 45 minute citizens input. When the citizens are talking, most of the council members look like they could care less what the citizens are saying..we need more sidewalks in the city. The only time the city discusses these issues is are after someone gets injured or killed. I guess there is no money to to be made on side walks.The rich get richer, the poor get poorer. Our city leaders ought to be ashamed of themselves!
4	need to keep Jaycee park as neighborhood park, develop more neighborhood parks, and develop parks specifically geared to commercial and cultural events (kiosks, bandstands, bistros etc) these do NOT belong in neighborhood parks
5	I have lived in SW CC for over 30 yrs, and SE CC before that, the City does not listen to the citizens, ex. Jaycee Pk. you should be looking at SportComplex on Trafglar parking is real bad, also only one way in and out. Traffic light at Trafglar and 20th would also help the school not just the sport park. Stop building till you have the roads that can handel the traffic, also called Dept. of Public works about a dead dog in the canal and was asked "ARE YOU SURE YOU LIVE IN CC and it took 2 days before some one came out, he asked where it was I told him the tide had taken it out. Very unprofessional. I have always gotten the best service from the Fire Dept. it is one of the best,
6	Traffic has gotten unbelievably difficult on the roadways. It is difficult to get anywhere without hitting a traffic jam, especially during peak travel times during the work week. Tourism has taken over, leaving no room for locals. Housing pricing are off the charts, the future generation cannot afford to buy. Taxes are so high on existing properties, homeowners are going to begin foreclosing.
7	STOP the UEP!
8	More boat ramps with gulf access

9	We need more traffic enforcement. Too many speeders, loud mufflers, loud exhaust systems & drag racers.
10	Cape Coral spends too much in the South especially Along Cape Coral Parkway. Apartment and Condos are going up at an alarming rate. Canals make travel difficult, with more APT/CONDO development will make traffic impossible. More multi units will also put a larger drain on the water supply. If there is so much water to allow these thousands of units why are there restrictions on water use?
11	I think there should be a green line on Pine Island Road from US 41 to the intersection with Burnt Store Road. Stopping at each intersection slows you down. And of course noise barriers along Pine Island Rd and Del Prado. Noise pollution is a major quality of life issue in that area.
12	Roads are a big issue. Maintenance and upkeep are necessary is so many areas and sidewalks for safety for children and adults!
13	Stop building storage facilities, drug stores and car washes
14	There are way to many apartment complexes going up. With all of the canals there is no way to widen the roads to accommodate the traffic.
15	The infrastructure in this town Hass to be improved before anymore. Housing development continues. Also assist senior citizens in paying for your ridiculously high assessment for the UEP
16	Since when does a public affiliation become a pro on shade trees. One irritating issue is the trash collection an horticulture pickup they need to do a better job cleaning up
17	The fact that you dont listen to citizens about redevelopment like the park and redfin development of wetland
18	There are too many houses being built and too many apartment buildings being built and we do not have enough infrastructure to support it
19	City leaders need to listen to the will of the people; not let money influence choices. You're ruining the Cape Coral that people moved here for. Don't make it Miami or Orlando.
20	Crime is going up, taxes are going up, the population is exploding, and there won't be enough water soon.
21	Infrastructure has to be improved and expanded to accommodate the population explosion.
22	It's too much about the money and less about the environment. We have to provide a safe and healthy environment for us and the next generations. If you continue to poison and destroy nature it will "fight " back and we all have to pay the price for that.
23	Better traffic control around neighborhoods with schools. Road improvements, public transportation, roads that do not flood. I'm here since 1991 and instead of getting better, the Cape gets worse
24	I do NOT like the number of storage units and dollar stores popping up. Please stop allowing this kind of development as we have plenty available already.
25	Please STOP building apartments. I'm 66 & I've lived in two other cities that had an apartment building boom to provide housing for lower income & the cities went into decay where the apartments were built. Let's be a city like Naples & attract the business executives that will come here & grow tourism. Make Cape Coral a Classy place to vacation. Fort Meyers has plenty of housing for lower income families. We don't need the lower income housing to attract minimum wage workers. We moved here 3 years ago, and there has been an unbelievable building boom of apartments that must stop if you want Cape Coral to be a place people will Retire to or Vacation to. Build a cultural environment for tourism ..... waterfront parks, build an aquarium like in Atlanta, a High Museum of Art like in Atlanta.

26	We're losing our hometown feel and I don't feel the mayor and city council are listening to the residents. Please don't try to make this a Miami or Naples. Spoken from a Florida native.
27	It would be great for the city to pay attention to the will of the residents instead of their personal agenda, which includes city council and city paid mgmt.
28	no more storage units, gas stations, dollar stores, food trucks (we need to support or local restaurants, they pay taxes on building, etc,) Fix street signs and lights - has been out for over 1 year. Yacht club and Jaycee Park should have been voted on.
29	Boating, marinas, waterfront dining!!!
30	Would like a community pool and more beach areas
31	We are all not going to be happy but they are retiring and don't want snow there is no place left for them to go and it's going to be so bad beteeen the Miami Cubans and Ohio we won't have any room left or water
32	Northeast Cape Coral needs more full service restaurants and lounges.
33	How does the council afford to live in Cape Coral?
34	C C PUTTING WAY TOO MANY STORAGE UNITS IN S W CAPE. !!!!! SW CAPE IS MOST BEAUTIFUL AREA IN CAPE & SHOULD BE KEPT BEAUTIFUL WITH HOMES.....NOT STORAGE UNITS..... SO RIDICULOUS
35	Time to stop development and work on what we have
36	This is one of the ugliest cities I've ever lived in. It is just continual expansion with no thought of preservation or aesthetics.
37	No overdevelopment of apartments, homes, or commercial (including tourism) before roads, traffic and environments issues are addressed. Current situation is nonstop building without plan for roads, parking and service workers in the area. Slow building to accomodate.
38	Leave Jaycee Park as it is. Not all development is progress. Maintenance and repairs are welcome, but commercialization of a pleasant green space is a degradation of the neighborhood.
39	More attention to the NW section would be nice. Maybe neighborhood parks? A pool? Restaurants and shops?
40	Taxes on short term rentals. Noise management on rental properties. Code enforcement on builders need improvement.
41	I am a senior citizen with limited income and limited mobility. Currently, the only busses that come anywhere near me are school busses.
42	better traffic signaling sequencing. Some lights are excessively long.
43	Too much traffic too many accidents holding up traffic we need wider and better roads.
44	We have too many rental units! Renters have no vested interest in the community but still have voting rights. Rentals hurt housing values, mortgage companies consider number of rentals when appraising property. Stop promoting food trucks, support business owners with brick and mortar stores, they hire people, pay taxes and contribute to the community, food trucks are mostly from Leigh. Improve traffic flow on major roads, especially downtown Cape and Pine Island. Downtown Cape is a blighted area. Fix traffic signs/signals damaged by storm. Waiting for Insurance money is not an excuse, owners had to do repairs to satisfy code while waiting for their insurance. Stop storage units. We don't need food trucks, band shell, commercial business or boat slips in Jaycee Park. No food trucks should be permitted in the marina or what ever they are building at the base of Cape bridge.

45	Make the entrance to downtown beautiful and inviting when entering from the new bridge. Eliminate dumpsters, run down buildings/apartments and pawn shops as the first thing you see. Make it a wow when people first enter our city. I remember being very skeptical the first time I drove i to town several years ago. It has improved, but we're missing the wow factor.
46	Too much traffic the roads can't handle the population growth.
47	Watching a citizen hauled out of a City Council meeting by the police this past week pretty much says it all about how Council feels about citizen concerns. The gentleman that was hauled out was sitting with his back to Council. This triggered the mayor to start yelling at the man to sit down. He was sitting. Then two police were directed to remove the man. The disrespect that Council displays to citizens is beyond appalling. Council continues to display their true colors……people should be paying attention. Council continues to demonstrate that they are only interested in power and putting money into their own pockets. Unbelievable on so many levels.
48	Preserve & expand green space , bike lanes , more high tech. Jobs & training. Higher teacher pay. Ticket cameras at intersections for revenue going to parks and recreation. More indoor pickle ball courts.
49	Please stop approving storage units construction. Also, can Code Enforcement please do what their title suggest. Code enforcement is not only about who is watering their lawns out of schedule. What about people parking seven or more vehicles at one residence and on lawns etc. because there is no space to park. Passing ordinances with no teeth is useless.
50	We have been here for 22 years. Own our home. Young adults graduating college can not afford to live on their own because rents are out of control, yet more and more apartments are being built. Traffic lights and signs are still not fixed and it's been a year. Yacht club not open. Schools need better security. More attention needs to be on the people who live here year round not the snowbirds.
51	Our traffic and road congestion is getting worse. No new big developments should be considered that put any more traffic on CC Pkwy. We need to preserve wetlands and green space and cater less to tourism and attracting snowbirds. We need schools of higher education- technical, community and even branches of 4-yr colleges, to keep young people here to fill future jobs in technical and other higher level areas. This would improve quality of life for all and foster growth in the right places, not just tourism and catering to big developers and attracting snow birds who come and go and care little about long term residents and quality of life
52	Why doesn't the city notify the neighbors of a massive 100 unit complex possibly being built right beside multiple primary residences that some have been owned since before 1997! The theft, car accidents and crime will increase! The progression is ruining the Cape, just like Jaycee Park now the City will ruin it for the residents that live near it. Pathetic - greeds ruining decisions made by city council/ mayor. Cape 720 is going to ruin the neighborhood between Nicholas Parkway and Skyline Blvd. There isn't enough of a main road for a complex to set that far off pine island road.
53	Stop building Storage facilities. They look like crap and add no value to your city. More emphasis needs to be put on muli functional facilities. Road and traffic movement need more emphasis put on the front burner
54	Cape Coral is beginning to look over developed. Traffic is becoming problematic. Roadways are not up to par with the growing direction it's headed. Cape Coral needs to slow down.
55	Concern that the Burnt store road area is going to become one long strip mall with gas stations and storage units. Need more nice restaurants.
56	Keep development out of the mangroves

57	Cost of living in Cape Coral becoming much too high
58	Cape Coral needs to focus on staying the quaint small town field. It has been known for. No one wants to come to see high rises!
59	City leaders are destroying the bedroom community attractiveness of the city. I'll be leaving soon.
60	Cape Coral's roads can't handle the population it has now on them, more growth only means worse problems. Fix the roads for future growth. Sometimes you have to put money into a city before it can make money!
61	Stop the development of high rises
62	I have lived in Cape Coral for over 30 years. I believe that the roads need improvement as far as paving. Too many potholes and rough roads. We do not need any more storage space.
63	LEAVE JAYCEE PARK ALONE!!!!! Stop approving housing permits, especially multi units. We are overgrown with residents and the infrastructure is not built to handle it
64	Please fix all the street lights and crooked stop lights damaged from hurricane Ian. It's dangerous and dark at night.
65	Stop wasting tax dollars on sidewalks where there are no pedestrians (del prado ext). Invest in covered bus stops. Save rain water to offset drought!! Utilize unoccupied commercial space instead of building new. On del prado tons of vacant restaurants/offices looks like the slums. Make jaycee park upgrades, the people fighting it think they own it just bc they fear change and want it for themselves. They need to remember the whole city has rights to that park! Need more dog friendly parks too.
66	Keep our history!
67	I am afraid the roads can't handle all the people that have moved here. And feel we need to slow down on building all these apartments. And we talk about improving parks, but eliminating Rotary Park is not improvement, but a disgrace. Can we please leave some nature and not put cement over everything? Also Jay C I feel if you left the trees you would probably make alot of people happy. The shade and breeze you get while being under or even near those trees is what really brings people to that park. Also you can't get a parking spot during lunch under those trees, because that's how much people enjoy that spot. That and seeing the river. My own opinion is if you left the area by the river with trees in place alone you wouldn't have a push on developing the other areas of the park. Besides they stayed up during 2 major Hurricanes that hit this area. I feel a compromise needs to be made and that would be a good one.

68	Having more access to large and usable venues like crystal lake yact basin/ boat ramp that can cut through mangroves to Charlotte harbor would bring great development posabilites to west cape and the yucca pens 110000 acres preserve can provide offroad parks and tracks to allow more use to people like minded and bring revenue to North cape areas that could provide venue supplys like concerts dirt bike /ATV rideing and also perhaps a Nascar raceing venue and them parks of that nature the trails all exist allredy the paths through the woods and off shoots can provide many different kinds of fun and sport for our community of younger and younger people not just bird watchers or hog hunters that use the property now there are many of these locations much better suited inland and on the river to do the more ecofrendly and hunting activities with better results like the thackahathee strand and parks up river and everglades national park and hunting areas where less people would visit the amount of possable visitors to crystal lake marina boat ramp and yucca pens off road activities far out weigh the amount using these areas now and residents need more colser recreational access to waters localy able to provide large boat ramps 10 slips access and 100 parking spaces and restraints and fule bait and supplys can provide access for life safety ND law enforcement bases there too like the yucca pens can provide recreation it has provided for decades it still can safely with use protections and proper regulation and provide a tourist destination to do what florida has provided naturally I've lived here since 1967 and the north cape ended at pine island rd Santa Barbra west ward was being cut in and developed but no one thought about the people local recreation destinations and venues to profit our city were not all couch setting elderly that in the past hated pickup trucks were a living vibrant population I'm 67 and believe this can be done and provide a huge improvement to our city
69	City leaders need to actively listen to residents and their concerns.
70	I moved her in 1993 at age 25 and loved it. Today, roads are crowded, crime is up, skilled/honest contractors are hard to find, doctors have waiting lists to get established, bridges are a nightmare in rush hour, no one can agree on what should be done. We hought we'd retire here, but plan to sell our house in the next 6 months and leave SWFL. The population growth has outpaced the services and infrastructure and no one in my family, young or older, enjoys living here anymore. I hope this survey provides insight but I don't think you'll ever please everyone who lives in Cape Coral- it's a weird mix of priorities people have.
71	To promote walkability, downtown area should have high density and intensity, and allow greater building heights.
72	I thought the City handled Hurricane Ian very well. Restoration began immediately and was very organized and successful!
73	Bringing more culture to the Cape will bring the tourism, which will bring more dollars spent in our city. Developing beautiful landscapes and recreational places residents and surrounds areas residents can enjoy will have those traveling to our city. I am a resident for over 20 years, I love seeing the new development but we need to step away from storage units, dollar stores, and extra housing. It's time to develop a city where tourist and residents a like come and enjoy diverse cultures, arts, food; we/they spend the day and our dollars.
74	No more storage units!! More commercial areas to attract people for spending money in shops, entertainment, things to do and attract tourism. Places like Disney or Busch Gardens or Universal Studios!
75	I would like the city to start designing neighborhoods with commercial, educational, professional districts. A block in each neighborhood that is walkable and doesn't require a 20+ minute commute to work, and ease for acquiring the essentials that don't come from a dollar general. A real locally owned general store that neighbors can walk to, socialize with neighbors at. Office suite spaces for professional use would be great for small architects, engineers, accounnants, etc. Maybe a micropark that neighbors can meet at. We shouldn't have to drive miles and miles to the nearest big box grocery store for eggs, to eat out for dinner,

	and to take our kids to a park. Walkability, community, less need to drive to the other side of town or over the bridge everyday would greatly increase the quality of life of Cape Coral residents.
76	the city leaders seem to have an "agenda" and it is not what the citizens agree with
77	More money is needed for schools/teacher salary. We need more stores so we do not have to drive to Ft.Myers all the time then pay a toll. Traffic studies need to be done round abouts would help a lot of congested areas.
78	So many people from other states with money have come in and created a atmosphere that makes it hard for blue collar workers to purchase homes driving up prices on utilities, property and building. It's so unfortunate I've been here 5-6 years am a General Manager of a business and still struggle to purchase my first home or satisfy the ever rising cost of living. I would like to see a first time home buyer program specific to Cape Coral. I would also like to see is better protection for wild life. I've seen burrowing owls being ripped from their nests by builders all over the city. Cape Coral should also make a more concerned effort to promote solar energy for not only homes but businesses. I have just started my first LLC and wish Cape Coral had more of a support system for local business owners and more assistance when trying to get your own store space.
79	Cape coral could use some upper scale establishments; shopping, fine dining, and public beautification....Naples meets Anna Maria island!
80	I have lived here since 1988. City Hall has deemed the residents inconsequential until tax time. Taxes continue to increase and services continue to decrease. Building continues to expand and there are no reasonable improvements to transportation facilities to handle the increases in traffic. You can't build another 10k units and not increase capacity on the roadways. There are violations of the MUTCD on our streets everywhere in the City, and new ones pop up on a regular basis.
81	Why does it take so long to get anything done ? Example yacht club, lights fix from hurricane, drainage, etc. Fix up downtown to attract young and tourists. Venice's downtown is so much nicer and quaint.
82	Living here 33 years, water utilities issues , running out of water should never happen , the council getting paid but not using it to build schools , shelters for storms or roads as we will need for evacuation. Don't all council get big kickbacks from the current investors….
83	Focus on infrastructure - water,sewage,and roads. Too many multi apartments and storage units. Repair our street lights and signage.
84	None
85	None
86	No more tall buildings. Roadways need to be expanded to handle traffic.
87	Cape Coral leadership should actually listen to it's residents concerning development
88	There needs to be increased focus on traffic management. Pine Island road needed to be 3 lanes by now.
89	We love living here but there are certain growth challenges. There are not enough job opportunities and a diversification of industry is sorely lacking. This needs to be beyond downtown. We have other great zones, like pine Island and veterans, that are ripe for development opportunity. With the population increases have come a need for traffic control, sidewalks, street lights, and beautification of the city. Our city is hotter than most in part because we have no tree canopy so beautification is high priority beyond the aesthetics. What makes our city great right now are great schools, great kids programs, and the high quality parks and rec system. It's a good place to raise a family. Keeping/ encouraging that is important. We do need another hospital.

90	Balance budget. No debt!!!
91	Time to update the old facade. Come out of the retirement community idea that is no longer
92	Affordable housing for seniors is lacking
93	I am concerned about the cost to have water and sewer put it and that the home owners have to bear the brunt of the cost. I have lived in other states and we NEVER had to pay for any water or sewer installation or issued. The city had funds to pay for it.
94	The traffic NEEDS to be addressed. That and the cost of living - taxes, utilities, insurance, is like a bigger area but without the perks. Outside of bars, there's not much to do here.
95	The Cape use to be nice. Everything now is so congested. You are not paying attention to Cape people. You are destroying the parks. Bigger is not always better. You need to put sidewalks in All over the Cape!!
96	Need infrastructure to support the amount of people moving here and more grocery stores and places to shop. Even when it's out of season it's still busy.
97	This is a near worthless survey. No depth, preselected answers for us to rank so as limit results to what survey creator desires. A first year college student could create a more meaningful survey.
98	Ways to entice small business owners & niche businesses. Ways to clean up the canals- as part of the beautification
99	The rate of growth Cape Coral is experiencing is alarming. Natural habitats of protected wildlife is disappearing from neighborhoods. When protected wildlife is removed, people will forget about them and deem them a nuisance. Humans and protected wildlife can coexist but only if there are measures to support coexistence. I enjoy seeing the burrowing owls in neighborhoods or the occasional bald eagle sighting. The city has lots of redevelopment plans in place of areas south of Pine Island Rd but nothing in the NW or NE areas. These areas are experiencing rapid growth and yet there are no parks except the few near Burnt Store Road or near Del Prado. I'm disappointed with the amount of economic initiatives put forth by the current council and yet nothing is being done to create beautiful relaxing areas in the newest and fast growing areas of the city.
100	We need white collar jobs in that Cape. This would cut down on commute traffic, and bring in dollars.
101	After watching the CC mayor trigger a senior citizen about Jaycee Park so called improvements to the point that the person was escorted out by two police officers…..what is the point of this survey? CC city council is going to overrule citizen concerns….to the extreme of turning the police on anyone they can. Unbelievable……
102	Please stop all the multifamily development. Traffic is showing a huge uptick and until we start to be more professional about the population boom, we need to pause the mega multifamily development.
103	Fix the Yacht Club before beginning new projects
104	More downtown and entertainment
105	PEACE

106	the city of Cape Coma has turned into a sh*t*ole and has allowed duplexes and multi housing apartment complexes, car washes and storage units to take over...the past and former residents which used to be respectful have slowly died off or moved out of the city...shameful what the city has allowed in to live here and trash the city...the English language is not spoken in many big box stores or home "services" anymore by employees and i find it offensive that employees shove a smartphone in my face to translate questions and answers...government officials in Cape Coma do not listen to residents needs or suggestions but have selfish motives for projects that benefit themselves...nobody there listens...I am terrified of the coyotes which roam my neighborhood while I try to take my dog outside on a leash during the day or night...the city acts as a HOA with ridiculous citations for petty things they purposely change up so residents will get fined....haven't found a dr I like or trust in over 5 years...and honestly I don't trust anyone professionally in the city so go elsewhere for professional services within the state of Florida...go anywhere else within the state of Florida and mention the name Cape Coral and other Floridians laugh....so many many people leaving the area as there are many better places to live in the state of Florida...red tide, blue algae, no beaches...but on a positive note beautiful sunrises, sunsets and views...all God given gifts and not anything Cape Coral government can take credit for
107	Opposed to development S. of Rotary Park
108	I live in the NW. I would enjoy more access to the Gulf and strategically placed commercial developments (like 7 islands) and make Old Burnt store and West neighborhoods golf cart friendly with proper safety requirements.
109	What about something big like Gulf Coast Town Center or The Forum with apartments/shopping/dining/entertainment- everything in one location? This would enable people to live an work in one community with less driving.
110	Infrastructure improvement assessments of $34,000/lot is criminal. I've worked in this area as a contractor for over 35 yrs in several states and not one have I seen a city charge assessments for Infrastructure improvements. Connection fees & plant buy in fees for sewer/water connections typically would total less than $5,000 for both. FL received app. $6.3B in the Federal Infrastructure Bill yet property owners in NW Cape have to fully fund Infrastructure improvements? Starting a (much needed) project of this size without first attaining funds at the State & Federal level is complete incompetence by city leaders. The lack of street improvements around most of Cape Coral is pathetic. A city the size of Cape Coral without curbs, sidewalls, street lights and green space beautification and median landscape is unheard of and makes Cape Coral look like a second rate, poor, southern city struggling to survive. I've been waiting for the "waterfront improvements" and completion of the 7 Islands project for 15 years. This should be a priority now that property owners have been screwed out of assessments to get water and sewer to this area. Burnt Store Rd N. Of Pine Island is a complete failure. It's now a deadly stretch of road that will never be anything different unless it's current design is completely revamped. The County and City had a perfect blueprint in front of them for this much needed improvement with the design South of Pine Island rd. But again, you failed and made changes for the worse. Increased wages and lower COL in Florida was a must happen 5 years ago. It's now to late. The COL has driven many retirees, elderly, middle income hard working families out of FL. Increasing commercial development to support the increase in population is a must but it's also the demise of the city. The very workers you're asking to work at these much needed businesses can't afford to live in Cape Coral or anywhere in SWFL. Florida is a disaster. Cape Coral is a mess with failed, incompetent leaders that continue to make poor decisions after poor decisions. Providing a pointless survey for our opinions is just that, pointless. Y'all are going to make the wrong decision anyway regardless what this retired, Engineer, Architect & Plumbing Contractor thinks.
111	Overall city beautification and flow of traffic is a high priority.
112	Listening to people who live here and why they love living here while also balancing progress toward future sustainability. This city is gem but can’t over tax or over debt people

113	Natural gas and fiber in all residential areas.
114	Cape Coral parkway has tree different speeds from Santa Barbara to the bridge. Needs to be standardized. Also, the cost to live in CC has sky rocketed. What can be done to ease these concerns. Lastly, some contractors have increased their prices just because they believe Insurance will take the burden of the increase. So wrong. Can they be audited and fined if it's determined the pricing was gouged? Let's keep Florida honest. Thanks.
115	Cape coral is developing circa 1960s, not 2023. Need to install solar on all new construction, underground utilities against hurricanes, better more extensive recycling, better education on climate change and ways to slow impacts. Florida is a designated global biodiversity hotspot, yet policies ignore benefits of modern methods to ease impacts on natural environments. Goodbye, manatees, cougars, coral reefs etc.
116	Main roads are very congested. There are not enough through streets for the amount of traffic. People drive too fast, we need better enforcement of speed limits.
117	The city is turning into a concrete jungle. Being developed without good vision or beauty! Wrong direction!
118	I feel that the city is going in the wrong direction. The officials are squashing small business in favor of their own special interests while bringing in low-income / high-density / high-crime residents. We've been in Cape Coral for 4 years and have seen a dramatic increase in crime as more apartment buildings are built and more people from Miami move over.
119	I think most people agree that the City tries to do it's best but fails to take into consideration the residents concerns over money, taxes and development of the city.
120	Affordable housing. Control over multi housing rental standards. Number of renters in unit and maintenance.
121	Na
122	No more bike nights
123	Taking on too many development projects before fixing signs, utilities, existing areas like yacht club
124	The need to communicate to all residents.
125	Code only seems to be enforced if you call and complain. When you call they do respond. Dirty and and overgrown landscape. (new Burnt Store Road Project). Not eye appealing at all. The cape needs more trees planted. Very few places to just chill in the shade. Need more parks in N.W. Cape
126	Do not borrow funds for city councils pet projects. The Mayor and city council disregarded the residents input about Jaycee park and the Yacht club. They lied about the damages from Ian. They are dishonest and can't be trusted. We are organized and plan to vote you all out!
127	Council needs to stop in fighting and focus on what's best for the people that live and conduct business here and your building departments treat your small business developers like second class citizens Remember we are bringing our net worth to your city to make it better, don't treat us like crap, Rob H did, Mike I will be a great CM, give him more power and impact to drive positive change for Commercial businesses
128	Traffic movement is a problem now and will only get worse as we grow.
129	So blessed to be living in paradise

130	The roadways need updated to accommodate growth. We also need an east/west roadway into ft Myers with fewer lights etc.
131	Sidewalks!
132	I watched a city meeting on local news about Jaycee Park renovation. An older gentleman turned his back to the City Council. He was loudly reprimanded for not being seated…it appeared he was seated. He was then dragged from the meeting by two police officers. Citizens are passionate about city parks and the park's natural beauty. There needs to be a change in the members of City Council. They continue to be obscenely interested in enriching themselves. They treat citizens like trash. Surveys are put out about issues…those surveys do not allow any input other than with the party line. Probably this survey will not truly represent citizen responses. No big surprise in Cape Coral….aka "Paradise".
133	A lot of hoops to jump through for any online business many times adding zoning application to process is nothing more than pinching a penny off new business
134	Needs to be more growth and job minded. Pro residential development and commercial development More things for people to do, dining, shopping within Cape Coral vs. having to go to fort Myers or Naples.
135	Need to increase the facilities of the high school. You have two elementary schools, one middle and one high. Both the middle and high can't accommodate the growth. You can't move two schools Into one. You need to expand and make a real high school with an auditorium and a football field. Use the former space to expand the middle. You have to accommodate the growth and address it. Cape Coral is growing, so should the best school system in the county!
136	More highway improvements
137	I currently own three rental properties as well as my own residence. I am thinking of selling most everything here as I don't like the direction the city is going. It is crucial that we save our mangroves and wetlands for the protection of the residence. It is proven that these absorb much of the impact of storm surge. I don't like that the city is only concerned about more development instead of creating a quality of life for its residents. This is such a short term position that makes me so sad as when I first moved here 15 years ago, I had such hopes of the city fathers doing the right thing for us. I live on a canal that people speed down everyday to go to the spreader and yet there is no policing of the canals to stop this from happening. We have seen manatees in front of our house and I always pray they are not in the way of someone that puts their boat on plane. I am also concerned that not enough is being done to educate the public about not polluting our canals. I don't understand why we have grass to the seawalls that gets blown into the canal on a daily basis. We do not have grass and I wish the city would promote healthy canals.
138	Cape Coral needs to develop as a standalone city. Assume no one is crossing the bridges. What do we need to function? And we need city officials who do more than give lip service to public opinion. Lately, their minds have been made up first before any public input.
139	Is bike night really necessary? We need more shade trees along parade routes.
140	Clean up the water ways and replace both locks with high speed locks! Petition the state for a northern canal with a high speed lock to improve access to the gulf.
141	Although tourism can be fantastic for economy, we need to address the traffic concerns first. More Parks and outdoor Recreation would not only benefit those who live here already but entice more to move here and help grow our economy from within
142	While growth cannot be stopped the town needs to better manage how and what can be allowed. The building department needs to do a better job in servicing the community. Public property should not be used for

143	I would like to know how the city council has the authority to proceed either the huge expenditure of the Jaycee Park without a vote and approval of registered voters. If the council does indeed have the authority, they have too much authority and that should be changed.
144	We will probably move from Cape Coral soon. From our brief time living here we have learned that this city does not include citizens in important decisions. They simply put out a survey then pay no attention to the results….only what they want. Mouth music. We've never encountered an attitude like this.
145	The Airbnb need to be controlled. To many and the don't abide by the laws,and act like motels.
146	Zoning improvements to better separate single family housing, multi family housing and commercial
147	Your building more high end housing to were the people who work here cant afford to live here wont be long and won't be no one to work because the cost of living is to high. Then how will you serve all the tourist
148	Stop approving car washes and storage units. We need higher revenue jobs and less commercial development. Need a better hospital.
149	Need more industry here as far as manufacturing. Need to spread tax base out and take some stress of both Cape Coral bridges or at least slow or down. Take advantage of industrial park and less housing development.
150	Tell council and city workers to remove head from ass. stop contracting our trash. Stop screwing workers allow them to take work vehicles home since cops can. Someone haven't a camper or trailer at their home does not effect property values fire all the code enforcement give that money to schools
151	We really need more trees for cleaner air, shade and homes for wildlife. There is no downside to more trees. We also need harsher fines for our protected and threatened wildlife. Please don't turn the Cape into another Miami, slow down on the building, the roads (and residents) can't take it.
152	There needs to be proper campaign events for city officials when they run. They need to meet the community and be active in getting votes. No one knows who these people are and we are stuck voting for people we don't know. It's not fair to the residents. We need live, public debates
153	The leaders need to listen more to the citizens WE ARE NOT NAPLES. Stop trying to make us Naples. LEAVE THE PARKS ALONE, People enjoy them & their quiet beauty. MAke 1 area for food trucks. NOT at the parks & NOT along streets. Follow the guidelines/laws that you set forth for the Food trucks Driving the streets is terrible. Esp in season PARENT PICK UP AT THE SCHOOLS IS TERRIBLE. they take up & congest the roadways STOP BUILDING NEW HOUSES until people who need the help after hurricane ian are taken care of. Look around - there are still A TON OF TARPED ROOFS. After the next hurricane there should be a moritorium on NEW BUILDING. (not just permits) That way current buildings can get the support/help that they need. It is sickening that people are still waiting for the help.
154	The abandoned Country Club golf course now has homeless encampments in the brush along with Coyotes.
155	Too many hirise apartment structures. Roads can not handle all the traffic
156	The current City Manager, Mayor and Council need to start listening to the needs of its tax paying constituents
157	This city allows buildings to deteriorate and don't force the owners to fix them up. Why allow homes and businesses to not fix things? For instance, shingles or tile on roofs should be required. Fixing broken signs on the outside of buildings should be required to keep the business license. It's looking SHABBY around here.
158	Spend our money in the right areas-not car washes and food trucks-leave Jaycee park alone.

159	I have lived here 35 years and have never seen such a tone-deaf, uneducated council, and the bar was set pretty low. I have written to my councilman once a year, never a reply. Money is being wasted daily, and the only things you want to achieve is to tear down the few things that are great - Jaycee Park, Yacht Club, City Charter Schools.
160	So sorry we moved here. The City Council is a clown show. They have NO respect for citizens. Looking to sell….Cape Coral is definitely NOT paradise.
161	Stop shutting down Cape Coral Pkwy & bridge for tourist/ cultural events except July 4th. Additionally, shutting down city government for Columbus Day following Hurricane Ian was a travesty.
162	Bimini Basin cut through from the Rubicon canal. City council members must recuse themselves from voting on any plans that would enhance their private businesses.
163	let's start making good choices. for example, this crazy food truck area at the base of the CC bridge. Booze and cars are a recipe for tragedy. That area of CC pkwy is too busy already.
164	Please fix the Yacht Club and the Pier. Current City council seems to want to spend money in all the wrong places. Jaycee Park needs MINOR improvements, not a complete unwanted overhaul.
165	I feel the city dissolving the advisory boards was a poor decision. Green space is disappearing too quickly with over building.
166	Process PERMITS faster.
167	A nice riverfront boardwalk with shops and restaurants would be nice. Less car wash and nice restaurants.. better shopping options.. like maybe a Trader Joe’s or Whole Foods.. I shouldn’t have to go to Ft Myers to go shopping. The roadways need to spruced up with some trees and landscaping.. How is it when I travel thru other Florida towns and cities the landscaping is vibrant and welcoming? Lastly, the ability to get a doctor appointment is outrageous. A year to wait for an appointment?? Definitely the health care system needs to be changed. Again, why do I need to go to Ft Myers when live here.
168	Time the traffic lights of major roads for better traffic flow. You should not catch every red light doing the speed limit and take 20 minutes to go 7 miles down Del Prado.
169	Multi-modal transportation will help reduce traffic and create more people friendly public spaces. Get people out of cars and they will frequent local businesses more
170	I have lived in Cape Coral for nearly 20yrs and wouldn't want to be anywhere else.
171	We have plenty of parks. We do not have the infrastructure to support a growing city. New houses should have to add sidewalks. Our roads have potholes everywhere. Stop worrying about medians being relandscaped for the umpteenth time.
172	Traffic is horrible during season. It’s hard for locals to go anywhere due to the volume of people on the roads and in restaurants
173	Do more entertainment in North Cape. South Cape has everything but no parking it needs a parking garage
174	Why would we hire consultants from NJ, and not Florida locals?
175	All of this goes to shit if we can’t keep the river and the canals clean and remove the red tide/stop the lake O releases. The water is toxic and needs to be addressed first and foremost
176	Why our city officials want to take our waterfront parks and put bars and food trucks in them. Entrance on south bridge is already set up so the first thing you will see coming over the bridge are food trucks and both bridges with huge gaudy billboards. That’s making Cape Coral a better place???
177	Lower taxes and invest in business development!

178	Stop waterfront development. Protect our mangroves and stop the high rises that will destroy the coast line and create storm flooding risk. We get stuck with the flooding, higher premiums, home loss and you all line your pockets!!
179	Chiquita Boulevard, has so many high-rise apartments, it's going to be a ghetto in 10 years. The city is so segregated. It's very frustrating. We have a rich people, poor people, wealthy people, and people just trying to survive. The city of Cape Coral absolutely supports segregation. We have code enforcement. However, they never seem to worry about rich people. Perfect lawns? While we are in an extreme drought, fertilizers that pollute our environment. I am a naturalist, and I believe in protecting everything. I am not poor, I just have respect. Our taxes are paying for cleaning up our community.
180	Do not upgrade Jaycee Park! It
181	The City has shown time and again that they have an "agenda " and don't care what the Citizens want if what the cost is to them.
182	You need to address traffic
183	More Police patrols in neighborhoods.
184	The roadways need attention. Cape Parkway needs attention. This town is looking run down. Fix it up and Leave Jaycee Park alone. Put that money to fix this place up and get homeless off the streets and get them help
185	Our Police Dept should try to dispel the National perception of Police Depts. More outreach, more attention to citizen input. It took 20 years to get the Midpoint Bridge, expanding the Cape Coral bridge only to dump into traffic lights will not improve traffic flow, just like the Midpoint Bridge. Cape Coral needs to stand up to continuous ignoring of Ft Myers/ County
186	Please consider round-a-bouts instead of all the 4 way stops.
187	Please no more dollar stores carwashes storage units massive apartment complexes.
188	Shame on you for running the food trucks out of town
189	This is a City treat it as such. Stop letting people park campers/boats in their yards....Enough of the football parks everywhere....stop people from parking in the mediums, more trees on mediums....slow traffic along Chiquita
190	All the development plans seem to revolve around downtown SE Cape. What about all the talk about growing the NW along Burnt Store Rd?
191	There is not enough going on for young people. We need more bars and restaurants!
192	Too many apartments townhomes coming up apartments in my area.
193	Affordable housing is crucial at this point, and career development opportunities could help take some stress of housing away. As a young adult I'm seeing many of my peers have no reason to stay in the cape. Our economy is largely supported by tourism and healthcare. Diversifying our economy and opportunities for engagement in career based workplaces for young people should be a goal. This city has always had it's boom and busts with generational patterns, but we need to step away from being a retirement paradise. Young people who work the tourism based jobs, can not afford to stay here and keep working them. If nobody can afford to work at restaurants then eventually we won't have any restaurants, and we won't have much of an appeal for tourists.
194	Finish all the park projects you already started. Fix the crazy traffic because of unplanned developments, traffic . Our roads are in shambles. Replace all the traffic lights damaged from Ian. Street signs still not replaced or fixed. Terrible city management
195	A downtown like Ft Myers would be nice. We also need more shopping opportunities.

196	Good city but not enough public waterfront access for tourists, visitors or residents. Bimini Basin or Yacht Club are crucial spots.
197	North del prado is a disaster. You need other roads connecting 41 and pine island. The speed limit is 50 mph people do 100. Need to lower to 40mph like south del prado. Stop multi homes and apartment complexes the town is overrun with no infrastructure.. we should have a concert venue for big artists and to hold holiday events
198	Don't mess with jaycee park
199	Yes, tourism is important. However, there are people that live here each and every day of the year and they should be priority!!! I've been here 20 years. Traffic/infrastructure - we have more and more apartments being built in northwest Cape when it's already so congested on the roads such as Kismet, Diplomat, Pine Island Road, Nicholas, Santa Barbara, Del Prado, … Shouldn't we figure out the infrastructure before we allow the chaos of hundreds more people attributing to jam packed roads attributing to more accidents, red light runner & road rage) It took how long to get burnt store Road to a 4 lane road when it is a major road for hurricane evacuation and there's how many people that rely on that way out. Doesn't make sense we allow so much growth and do not provide adequate roadways. You are allowing developers to pack people in like sardines. We know we are growing fast. We should be responsible & jumping in to get ahead of it. Don't issue permits for more houses and apartments if we cannot handle the amount of people that come along with it. It's common sense. Growing downtown is great however more parking downtown is an absolute must if we want to see businesses survive. There's not enough parking for the residence let alone visitors from Fort Myers & season. Parks in areas where there is nothing nearby (leave Jaycee Park like it is the people in that area and all over the Cape go to the park because of how peaceful & beautiful t is currently). PLEASE STOP THE BUILDING OF STORAGE UNITS AND CAR WASHES!!!! We need places that will offer the city residents employment opportunities & ways to KEEP IT IN THE CAPE less commuting to Ft Myers. Hope you truly read all these surveys and take residents' opinions into serious consideration.
200	The roads definitely need attention.
201	I think Jaycee Park should be left as is with improvement to the roads, bathroom picnic areas Leave the trees alone No food trucks
202	We recently moved to Cape Coral. We are appalled by the actions of the City Council. They do not represent the people they were elected to represent. Frankly….we hope to sell and vacate. Unreal.
203	I would like to see cleanup of some neighborhoods. You want to beautify downtown with the new development but there are shady people and areas in between. I live in downtown and would never go out in the evening alone.
204	The City of Cape Coral cares not one iota about enhancing city residents' lives. City Council is openly disrespectful to citizens. In fact….they brag about not responding to emails or phone calls. This survey will probably not be honest about how the city treats its citizens. I'm sure it will be whitewashed to present only the City's desires…..citizens don't count at all.
205	Cape Coral is being built up too much, way more than it can hold comfortably without crowding more roads and neighborhoods.
206	Waterfront development!!!
207	Taxes are out of hand!

208	You're asking us when it's too late. The city already has allowed massive apartment buildings to be built all over. The placement of where these apartment building are being built are horrible. They are placed right in residential neighborhoods. Then you have the area being developed on Pine island road just beyond bubbas where all the area has been cleared. The city has allowed builders from out of the area to come in and build the box cookie cutter homes, where the garage has more sqft then the living space and there being built everywhere, right next to 3000 sqft homes and it's decreasing home values and bringing down the neighborhood's because these are rentals. The city cares nothing about nature or beautifying the city it appears the city will let whoever come here to build and ruin this city. It honestly didn't make sense to put a tractor supply on pine island when we are a community of houses being built on top of one another and apartments everywhere. Has the city council even given any thought on water Supply now that there are massive apartments being built. Plus how much are these developers paying to be hooked up to utilities because the city is definitely price gauging the single family residents, it's not right that you do not give the resident the choice to hook up to city utilities we are being forced and have to pay an outrageous amount.
209	Council members rarely if ever listen to their constituents and forge ahead with whatever they were planning to do. Seems like there is a conflict of interest in most cases, as many are realtors or have businesses that profit from their decisions.
210	We need more trees. More schools for minors. Would love a really nice shopping mall here. Better water access on the coast. It's too expensive to live here for what we have (or don't have) available to us. Please leave Jaycee Park alone unless it's taking care of it. Would love to see appreciation and preservation of natural environment for local wildlife.
211	Better planning
212	There should be no change in zoning for a Redfish Pointe. Hurricane Ian caused flood waters to come down Rose Garden Road like a river flooding El Dorado houses. Also, the community wants Jaycee Park to remain a place to walk dogs and hear birds in the trees. We do not want it ruined with boat docks like you ruined Yacht Club full of noisey, smelly exhaust cigarette boats from FM and loud music you can't even talk there anymore even for lunch. The city doesn't need to make money off our parks. Let us just be natural in the parks.
213	Highly oppose more high rise buildings, unaffordable for families and the seniors. Stop ruining the beauty that once was Cape Coral. The city has relaxed their rules, people park RVs boats and other work vehicles in their driveways, too many vacation rentals that are VRBOs that are ruining the residential areas with reckless renters, these home owners need to be accountable for their unkept yards and noise from their tenants. No one checks on these and their are many in the SW that are a burden to the residents who pay takes. City council needs to do their job and monitor this . We have live here 25 yrs and this area is really becoming an eyesore with these unkept properties. Too many of these vacation rentals in the area especially ones that are not registered with the city. Garbage and trash on the main roads as well. Promoting Cape Coral really brought the element in and now we are becoming a city that is dirty and unsafe at night especially DelPrado.
214	I love the Cape it use to have this small town feel . Thats why I moved here from my small town in MI. And to many people from other counties buying up everything and pushing out the people who have been here a long time. Need to take care of the people here first because you are going to have more homeless then you do now. It's over priced rent for a 1 bedroom over 1000.00 Just because you can charge it doesn't mean you should.
215	Cape Coral is no longer affordable to young families. It is overpopulated by apartment buildings making our roadways impossible and dangerous. What did you do to this once hidden paradise?! It's ruined

216	Personally, all the land available develop parks or waterfront activities not ruining existing parks. Stop permitting housing until the utilities are caught up. Roadways and water and electric can't handle what we have. Make c Vacation housing more long term so tired of weekend parties across the canal loud music loud people arriving Friday morning and leaving Sunday or Monday. That is not what vacation rentals are for
217	Taxes out of control. Been here 33 years and having trouble keeping up, due to us being senior citizens. Need help with school tax.
218	Communication needs improvement…
219	West bound traffic on Cape Coral parkway at the bridge needs a U-turn under the bridge to give safer access to the N side of the parkway between the bridge and Del Prado. Like the U-turn they built under the one bridge on the Sanibel Causeway. Also, many residents commute to FGCU to take classes. That drive one way is at least 45 minutes with an hour drive fairly common. Most student's today have to work and dropping 1.5 to 2 hours to take classes takes time away from work and study. Open discussions with FGCU on finding a way to offer classes in Cape Coral.
220	I am very disappointed having moved from IL to Cape Coral due to the cost of living. It is cheaper to live in IL, so I'm going back. The local government's priorities are mismanaged. The construction next door to me wiped out my home from Ian and I have had to lower my listing price by over $100K due to that dump that is allowed to have trenches and flooding next to me while it's being built. Yet, you all made me replace rocks in my yard with more sod which cost a LOT of money and brings rodents and bugs. Again, I'm disappointed and can't wait to leave.
221	The current trend is so far removed from the original one that it is sellout cape coral and destroying it
222	Only going backwards under existing state government. We are planning to move on soon.
223	EMPHASIS NEEDS TO BE PLACED ON SAVING WILDLIFE WITHIN OUR CITY BY PURCHASING LARGE LOT DIVISIONS FOR PRESERVATION AND STORM FLOOD CONTROL.
224	We are busting at the seams for our current infrastructure. There needs to be a lot more options for dining, shopping, and a Costco would be great, and then the necessities like healthcare. Those of us that live here year-round have horrible wait times for healthcare and if we want to go out for entertainment when the snowbirds are here, it's near impossible. Also, all of these streets need to be made wider with more lanes, and the major roads need to be turned into more of a highway with overpasses as an option. No more car washes or storage unit places. It would also be nice if we could end the monopoly that is Lee health and have more options for healthcare and other amenities. Like massage, chiropractor, dental that are actually good places.
225	The city council does not appear in the aggregate to care what the citizens want. We are ruining our environment with too much development in the wrong places.
226	Too many apartments are being built in place of single family homes. Yet we have the same roads with 100, 000 more cars on road since we moved here in 2000.
227	Traffic
228	Hard NO to Redfish Pointe development. We just barely survived hurricane Ian: have you learned NOTHING?
229	It would be great to have a Costco. FM is too far away :)
230	Parks and green space is important we don't have a lot of this I would like to see a park trails in old Golf Course off Palm Tree Blvd. this would be ideal for the people.
231	Need to improve traffic flow, more overpasses, improve pine island road

232	I am aware of the bidding process cities go through for consulting services. However Cape Coral missed the boat (big time) by not hiring a Florida company to do the survey and offer suggestions. You have to have a heart for your specific area, be rooted in the future. Having the yacht Club be tabled for repair and offering the expensive and ill planned changes at the park on the river is just plain wrong. Maybe some rethinking is needed.
233	Limit the building of apartments. Cape Coral is not the nice little town it used to be in the year 2005
234	Get water in the NW. You can expand businesses and housing. So much growth in mid/south Cape, traffic is bad, need water faster in the NW
235	Please preserve the beauty and quality of life that Cape Coral residents love. By maintaining open space and preserving as much land as possible. Prioritize wildlife. Limit development of open space along the water front to reduce the risk of flooding
236	Stop with sewers people can live off septic, and if you want to put it in, it should be a city expense not a homeowner expense if we don't have a choice
237	Outdoor living is one of Cape Coral's biggest assets. People love seeing the stunning natural areas and wildlife - birds, fish, tortoises, manatees, dolphins - we need to protect/enhance/grow natural areas and clean water to beautify CC.
238	Need to make the roads wider Need to pursue the access to Charlotte Harbor in NW Cape Coral
239	Small businesses like light manufacturing will enhance Cape Coral. Provides employment that then fills housing and spends money in Cape Coral.
240	No more car washes and dollar stores
241	Parking is strongly needed in downtown. And the roads and stormwater are a major concern
242	The roads are terrible, even newly paved roads, stop using discount paving like kismet from Santa Barbara to el dorado n .
243	We need the same caliber of shopping that is available in Fort Myers. Definitely need more choices for grocery shopping.
244	A stadium to be home for another major/minor baseball team. An outdoor arena that seats 4 to 6K to draw lesser known artists Something other than just houses, houses, houses.
245	Please stop building car washes which fill in our canals etc. self storage buildings, huge overpriced apartment buildings, DOLLAR STORES, and improve the overall look of the area.
246	I am opposed to building all of these apartments and condos. The traffic is bad and we don't have enough water for all the new buildings! We are as a city big enough, quit building!
247	I would to see more"green space" …areas for hiking and enjoying nature in our local neighborhoods. We're packed in here like sardines!
248	Temporary rentals need better management. Parties every weekend in a neighborhood is unacceptable. Extra non homestead tax dollars aren't worth the traffic, noise and all unknown people in the neighborhood.
249	This city needs to address infrastructure issues. Stop attracting tourists and take care of the residents! Traffic is out of control!!
250	Stop building houses so much. Roads are so crowded and we don't need more people moving here
251	The Cape Coral Parkway Corridor as you come over the bridge needs beautification. This is the first thing that you say when you enter the community it should be fresh and new and inviting.

252	Concerns about loss of natural landscape that is not being replaced with trees and planting. We need large trees in medians and public places
253	We don't have enough green space per capital of people. Start protecting what is left. Our city is being ruined by development!
254	City Council is NOT AT ALL interested in citizen input. Only interested in making money from developers. They are extremely disrespectful to citizens at Council meetings. There is a council person that openly brags about never reading constituent's emails, nor responding to phone calls. Ask me about the councilwoman who is scamming the taxpayers by not living in her district plus costing taxpayer money to discover where she really lives. No wonder residents call them "City Clowncil".
255	My family from other States don't like coming here! Cape Coral tends to provide activities centered around drinking, eating & boating. Those of us who do not enjoy those activities tend to spend our dollars in other cities/states that are not so boring. "Cape Coma" is correct!
256	I would love to have dog parks, places to roller skating, public pools, and bicycle
257	If you want more tourism, you need to upgrade roads, health care, places for the tourists to visit.
258	Preservation and protection of our existing nature parks and open spaces is critical.
259	City leaders who actually listen! Leave Jaycee park alone!!!!
260	We need to continue to expand our tax base to commercial businesses. Don't commercialize or reduce parks or protected spaces.
261	Cape Coral government is out to gain as much money as it can from big business …shadows the terrible US govt. Think about the permanent residents and provide infrastructure to handle this massive growth. Way too many car washes in this town, and not many hotels
262	Preserve mangroves and regulate speed on the canal system
263	I am not sure we have enough beach area to get the large tourist crowds so I believe we would be better off working on getting our manufacturing base and especially a high tech manufacturing company into Cape Coral for higher paying jobs. We need to have jobs that keep people in Cape Coral rather than commuting across the bridges everyday. We are the dog but we are being wagged by the tail right now!
264	Prefer Quaint old beach town feel of downtown versus big modern bldg also would like a major beach at NW side of Cape
265	growth in population needs to be controlled, growth has outpaced roads, healthcare, and most importantly our water.
266	Put in a good beach in NW
267	Leave Jaycee Park Alone!
268	Property upkeep, both commercial and residential, is important to enhance the beauty and charm of the city, no matter what street you drive down. To attract jobs, affordable housing must be addressed as well due to the needs of a growing work force both in the food and beverage area as well as parks and recreation.
269	Clean up from Ian isn't finished and you're thinking about developing downtown? Plant more trees to replace what was ripped from the canals by the truckloads.
270	We need larger parks like Jaycee Park Shaded, peaceful by the water for passive recreational opportunities Absolutely do NOT change that park,add more parks like that
271	City should have listened to Joe mazurkiewicz on the development of pine island road. Real mess now!

272	Cape Coral is not looking forward to our children. Our children have no reason to comeback, no good jobs are in the area. We need some technology industry or some other major companies to keep out talent at home.
273	Explosive growth with little accountability for the nature, roads, hospitals, schools and planning
274	I'm strongly opposed to the development of Jaycee Park and the destruction of our mangroves south of Rotary Park. Developers are ruining Cape Coral. Council members must stop saying yes to their money!,,
275	Cape Coral needs to focus on eco-tourism to bring in revenue. Our infrastructure is already strained, yet we keep building without addressing road expansion and limited water and electricity. I moved here from Miami 13 years ago and am concerned that the small, welcoming city I knew is vanishing.
276	Listen to the people! Seems they make decisions and don't care how we feel. IE: Jaycee Park. Safe Jaycee Park!!!!!
277	Cape Coral should not become a large city like Miami, but keep its open and natural areas.
278	NO MORE CAR WASHES OR STORAGE FACILITIES
279	Pine Island Rd is out of control with different types of growth. The traffic is horrible and there isn't a plan as of yet to widen the road. There hasn't been any thought given to the amount of traffic the mixed growth has put on the roadway. Big Condo/apartments complexes have been built with thousands of additional vehicles on the roadway. Poor planning for Pine Island Road western corridor. Ridiculous---
280	City leaders need to include much more open space, passive parks, nature preserves in their City plan. The Mayor talks about a balance between development and nature/environment. There is no balance. There should be no more development of the waterfront. Yes to a hospital, college, businesses on Pine Island Rd., Cape Coral Pkwy -OK. Lessen commercial development along Burnt Store Rd.
281	Leave JC Park and Piney Point alone! We need the protection Piney Point provides from storms such as hurricanes.
282	We need to bring in businesses like Tampa and be a tech hub so high paying jobs are available to attract young families. Also tourism will be key especially plans for 7 Islands. CC has a super exciting future ahead if economic development is planned properly
283	I moved here because of the family/community feel. It was a breath of fresh air to see so many birds & wildlife. I think we need to curb the use of pesticides. They are killing the food source for many species. I know hundreds of people on Facebook that connect with one another to see the owls when hatchling are expected. The endangered scrub Jay's are gone now. Many photographers have gone to other destinations. The green algae needs to be fixed to attract thrm back. haven't seen a grasshopper here in a decade. There were many when I first arrived. I don't think new residents are aware of how much it's destroying our owl population, the city bird. We need to stop putting the same old buildings up. So many duplicates are destroying green space. And insurance will drive us all out of the state not just the Cape.
284	Cape needs to slow down growth/development and concentrate on preserving green spaces and outdoor recreation. NO Huge Development south of Rotary Park. No food trucks at Jaycee Park.
285	Costco needed.
286	Definitely feel more attention needs to be paid to conservation of wildlife areas and protection of wildlife - too much emphasis on development at the detriment of open spaces and wildlife which help to make Cape Coral such a unique and beautiful place to live
287	YOU DONT HAVE TO STOP DEVELOPING, JUST TAKE YOUR FEET OFF THE GAS!!! This rush for building permits is a great example, what's the urgency?

288	The City of Cape Coral needs to focus more on environmental sustainability if it wants its economic plan to be sustainable. Populations and wealth will cease to exist once the sea levels rise more than we can correct for or after massive hurricanes wipe out the coastline. Be smart. For example, don't build on crucial wetlands just because it could house thousands of people and generate millions. Those little wetlands are what's protecting this city and giving home to endangered animals. At some point developers are going to need to learn that people aren't the only important living things on this planet. We're just the only ones who can force our way into places we don't belong.
289	Cape Coral needs to address its environmental issues such as maintaining and improving water quality over development pressures. Too much development! Too crowded, too much traffic, not enough open space. There is no need to develop the open space to provided unnecessary services. We need more natural areas to support our people and wildlife! We don't need more economic development without addressing the water supply and sewer issues.
290	It's too crowded. I've lived here 33 years. It's very frustrating to see so much growth in areas not prepared for it.
291	Please start paying attention when residents express concerns. What you all did with Jaycee Park and the Lock behind everyone's back was a disgrace! You are destroying the very things that people come here for... wildlife and water.
292	Some homeowners do not take care of their property or yards, There are abandoned homes. Junk, boats and trailers, businesses still have signs and fences down and in need of repairs, over a year now since the hurricane. Road signs still down, city landscaping all over needs spruced up. Overall all these things and more make Cape Coral look junky! Wish as a large city everyone took more pride!
293	Need to stop building and start saving the land and water, especially for wildlife
294	Too much focus on future growth. Not enough effort to improve livability. Leadership disregards public opinions. Water quality decline and disregard for future storm impacts.
295	Leave Jaycee Park alone -- it's wonderful just the way it is!
296	The city needs to buy more land for green space. Piney point would be a huge asset in this regard. The city council needs to listen to its residents and modify and change the city's plans to reflect what the citizens want
297	This city is FAR behind on greenspace and environmental parks and areas. The goal should not be to build out and pave every inch of the city. The City Council seems uninterested in what the citizens want. The council is all real estate and developers. Improve the current roads to help with traffic. The roads are not keeping up with your development. Start imposing Impact Fees on builders instead of shifting the cost to the citizens who already live here.
298	The one problem is "how do we fund " the development?
299	Eco tourism should be promoted.
300	Industries (current and future), where to go and what to support Workforce development, how to obtain and support Growth management, where to put certain development types, why important Current ratio of commercial to residential, sustainable or not Vertical integration or housing, doable or not in preplatted (what is experience of other preplatted communities, any success stories) Isolated transport on a peninsula, how to overcome, truck stops, etc? Suburb of Tampa, Miami, O-town, what does this mean for commerce and commercial activity (what should our expectations be) Sports tourism and growth (mid major sports recruiting, how to achieve) 400+ miles of canals, how to leverage this Marketing , how and where to country and abroad Demographics (changing, consistent, what does it mean for our businesses and recruiting/retention.

301	NO MORE CAR WASHES! They are on every corner where more productive businesses could be. We need to promote all in one entertainment venues for both children and adults. Higher end restaurants and bars. For example, Doral City Place and Brickell Place in Miami.
302	Do not take out mangroves to build on. Not necessary to change Jaycee Park with band stands, bar & boat slips. Leave the trees & road thru there alone. Nice quiet park now how should stay. Don't add additional cash burdens on residents here year-round. I don't want this to become Ft Lauderdale.
303	None at this time
304	Infrastructure needs to be addressed. With the influx of new residents and snowbirds it is unacceptable to take 45 minutes to drive from Pine island Rd to Cape Coral Pkwy on Del Prado.
305	Less dollar stores and less storage facilities. More quality business should be attracted. City has no central place to go. Surrounded by water but almost zero waterfront attractions.
306	Cape Coral is a young town. Therefore we need to save our fox , bobcats, yes, even coyotes, raccoons, possums , scrub jays , gopher tortoises, bears (residents saw a bear last year) our endangered butterfly's but especially our burrowing owls since we have the greatest concentration of them in the world. This council needs to save our green spaces such as Jaycee Park, Red Fish Point, Hunters Ridge Golf Course, the old golf course, scrub jay habitat Any areas left from fifty acres to one thousand acres from development for our wildlife or as Pascha Donaldson said that in ten years the Cape will have no wildlife at all .This current town council has the Cape's wildlife it its hands. What they do will kill our wildlife or they can preserve and protect it, For an example, any development at all on Red Fish Point will chase out our bobcats, coyotes , etc. They probably will get killed on our roads trying to escape the development on the Point. The wildlife will be gone forever on the only green space of any size in SW Cape will be gone forever, The current mayor said he wants balance for wildlife. Let him prove his statement for if no balance no wildlife Please preserve our green space. Pave it over it will be gone forever.
307	Affordable housing has to be job 1
308	The old golf course on Country Club needs to be cleaned up and operational as a golf course!
309	We live in the north side of town and we would also like to see more dining options that you can sit down at. Currently I drive to Ft Myers off Alco Rd to get to establishment we don’t have in the Cape to eat at that are different. Also, there are many more fast food options as well and we don’t have them in the Cape. We also lack in hotels options as well. You would never think that Cape Coral is larger than Ft Myers but we are and they have all the establishments to eat at and shop. As well as entertainment venues.
310	Why aren’t the parks that were promised with the bond passing not completed. Not even started? Come on, quit being subpar.
311	Less development. We don't need more people. Maintain what we already have.
312	Traffic is a major concern. People run red lights because they are entirely too long. The city needs to invest in technology that will enable lights to change when there is no traffic in the opposite direction. This will help reduce accidents and road rage. Do your homework. It works in other states.
313	Lower taxes! Fire the blind and deaf city council
314	City streets need more beautification. Businesses should be required to maintain landscaping.

	Public officials should make sure developments do not take away visual beauty nor public access to the water. The city should promote the town as boaters paradise. Water access differentiates Cape Coral from other communities. Pine Island road is not easy to drive on and that's where city leaders are developing more and more retail.
315	Road infrastructure - current system cannot handle all the traffic with tourists and increased apartment complexes, we need a new hospital that is not a part of Lee County so that it is competitive and can provide higher quality services, nature preservation - leave some of the green spaces, especially by the water, for the benefit of wildlife and public enjoyment, we need affordable and reliable utilities - cancel the LCEC contract and go back to FPL - after evaluating costs. They were more responsive following IAN and allowed the lineman into fix lines without the need of having the Governor step in to mandate it.
316	Fix our roads, finish installing signs and traffic lights. Finish all parks in progress. Stop planning more stuff until you finish what you started.
317	Affordable housing should be #1. This place will never be Fort Myers or Naples and it doesn't need to be. Do what needs to be done and provide AFFORDABLE housing, education, and access to healthcare. Forget about tourists. They will spill over from other areas. Protect our natural areas as best as we can.
318	Please spend your time, efforts, and money, developing the yacht club, recreational facility at the yacht club, our senior center at the yacht club and our beach. and a community pool where the kids can play, meet, and take swimming lessons. Concentrate on this area and please leave Jaycee Park alone!
319	I am concerned about the amount of Ag land that is being converted to commercial- there is NO plan for the city - the development is haphazard and not thoughtfully planned out.
320	The amount of car washes, dollar stores, and general stores needs to be deprioritized and the number of dining options, attractions and things to do need to be prioritized. There is little to nothing to do when the summer heat takes effect, especially for families. Possibly consider businesses and entertainment that is indoor.
321	Dollar stores-car washes-storage units are not enhancing our community - business/tech industry and education need enhanced. Our economic development is short sighted
322	N/A
323	When developing, please consider what the natural environment can provide. Every area is plowed down and left to be overgrown and not thought through. Use what natural trees thrive here. Make roadways wider and safer for drivers and pedestrians. Maintain what is already in place. Sidewalks, curbing, trees, benches need to be put in or utilized. Every new neighborhood is just wide out in the open with no actual plan. Just plotted spots that look awkward and get overgrown. This area is not like the northeast. The land, water, environment is different and is essential for thriving here.
324	Cape Coral has come a long way since I was little. They need to bring more tourism to the Cape-such as more hotels and more attractions for younger kids. There's still a lot we have to go Fort Myers for and its land mass is bigger and getting more populated.
325	Eliminate the south spreader chiquita lock
326	Please stop redundancy in business development ie: Carwashes and storage facilities. Why are they not limited? We need a large performing arts venue to lure visitors at night and weekends with festivals and concerts.
327	Negative impact of tourism - vacation rentals. People leave trash, making noise, etc. That's commercial activity in residential areas. It's like having a hotel on every block

328	As in the entire country, take care of your residents first. We have needs far greater and urgent than any tourist or snowbird.
329	Because there is many vehicle crashes, City of Cape Coral needs to install more traffic control devices and speed bumps so eldery and people with disabilities, school kids on school bus routes can safely walk in the area where we own our homes. For example, there is a lot of buildings that have been built of Sw 47th Terrace in between Pelican Blvd and Santa Barbara Blvd and now there are too many speeding drivers in our neighborhood. Also, too many vehicle crashes in intersection Sw 47th Terrace and Santa Barbara . Speeders on SW 47th Terrace make it dangerous for the school-aged children, elderly and people with disabilities, such as a drunk driver who caused large amount of property damage to 2 homes in June 2021 and was prosecuted in Court for leaving scene of crash, drunk driving, leaving drunk driving crash with property damages of 2 homes. Speeders have ran over and killed animals on SW 47th Terrace. Speeders make it dangerous for elderly, people with disabilities to safely retrieve our US Mail from Mailboxes installed on SW 47th Terrace. Hence, it is warranted that City of Cape Coral install needed traffic control devices or speed bumps to better the lives and well-being of elderly, people with disabilities, school age kids, families who own hones on Sw 47th Terrace in between Pelican Blvd and Santa Barbara Blvd.
330	Downtown development is good but not at the expense of the waterways and mangrove barriers. There is plenty of inland property for development that will not interfere with clean water and flooding prevention.
331	Cape needs more trees it is not a pretty place it needs a central location for gathering everything here is very old
332	Get the empty lots throughout the city developed or raise taxes on empty lots. Start to think of this city as a community and not a piggy bank for foreign investors that don't live here. Encourage diversified long term business investment. This place is ugly. Fix it up.
333	Less storage buildings, vape/tattoo shops, nail salons and car washes. More boutiques, an indoor/outdoor mall that includes a Cheesecake Factory and other great restaurants.
334	Stop building housing until the drainage problem is resolved. High rises only take away the "small town" feel. Beginning to get very overpopulated causing more traffic and accidents on the roadways.
335	Utilities is a big concern as we are scheduled for our many years out. The well water is disgusting. The sooner we get rid of septic tanks the better. I would also like to see more educational facilities, that would bring younger people.
336	Business facades along Cape Coral Pkwy, inconsistent and messy and old. Prioritize Bimini basin project, access to the Rubican, and more connections between different canal sections
337	Need more done to increase tax base and create more tourism. Lots a lot after hurricane Irma
338	The city needs to foster Healthcare & manufacturing and stop pandering to developers at the high cost of quality of life.
339	Please do not ruin Jaycee Park with food trucks. Beautiful peaceful oasis.
340	PLEASE leave Jayce Park alone!! It's a quiet, peaceful spot. A big venue will be terrible in a quiet residential neighborhood!!

341	We need less car washes, multi unit apartment complexes. Please! too many already! Support to local businesses during off season to help them survive during non-tourist season. Need an indoor walking track somewhere. It's hot and crazy humid here during the summer and all through out the years. No place to walk for exercise unless you join a health club and pretend to be a hamster in a treadmill. Much prefer walking at my own pace and speed!
342	SWFL is built on the water and this area has too much privatization of our waters. We need more access and more activities that promote the resource
343	would like to see fewer large apartment buildings.
344	Building permits need to be stopped until they have infrastructure to support the growth. traffic is getting impossible in off season, let alone during season. We are considering moving elsewhere. It is getting ridiculous.
345	Starting to look trashy. Too many vacation rentals. I'm sick of music all night. Fix the traffic lights and signs. The hurricane was a year ago.
346	If you don't improve the roads, and the traffic none of this will matter. People are really ticked off that you're not addressing that. Then you come up with something stupid like electric buses! If more people were in a better financial position, they'd move out of here. Not to mention the ridiculous number of apartments your allowing to be built.
347	Listen to the people
348	Police and Fire should be TOP PRIORITY for Cape Coral. This city was nice when we had code compliance and less apartment buildings. Now there are too many duplexes and apartments in single family areas. It is out of control and not enough police to patrol! You can't grow a city without growing city services!
349	I think waterfront parks and recreational areas for the residence, and to promote tourism should be a priority as taxes that it will generate will certainly secure all other concerns
350	The Streets flooding should be addressed, and I believe the city needs for find cheaper electricity options for it's residents.
351	I feel Cape Coral would benefit more with a NW beach area. Better canal maintenance. The entire city was built on waterfront and canals yet we only have 1 small beach area
352	I am concerned the city is less about the residents and more about businesses, and not high- end business but excessive car washes, storage units, and Dollar Stores. The city is beginning to look sad. The builders are not held accountable for their job sites, which look like dumps in the NW neighborhoods. Porta potties are still floating in our beautiful canals. I really do not mind paying higher taxes if I could see my money at work for the residents. Now I read that there is a proposal/plan to widen Pine Island Rd. Good grief…does any of the city council spend time in cities that have well planned infrastructure? I am frustrated with the peculiar trend of this city….which could be a beautiful destination and place to call home. I was a builder in another state and well understood the purposes of building moratoriums…I think CC needs to consider the crowded roads, lack of safe sidewalks, and lack of public transportation before issuing more residential building permits. Why aren't builders required to place sidewalks during new builds? Other cities do this successfully. Just a thought…
353	Quit building! The street traffic can not handle anymore traffic. I also believe there needs to be more done regarding poor and distracted drivers. Our streets are dangerous.
354	Traffic on Del Prado. Lack of a red light at Averill. Potholes on Gator Circle

355	There should be more policing of the streets. I am tired of seeing CCPD posting photos on social media of free food, and look what I can do photos. It's a waste of time, resources, and money. The crime in Cape Coral has skyrocketed immensely yet not one single cop is seen patrolling in high traffic, high volume, school zones & shopping areas.
356	Finish the projects started before spending money on new designs and development. Stop wasting our money on frivolous designs
357	LEAVE JAYCEE PARK ALONE!!!!!!!!!!!!!!!!!!!!!!!!!
358	Code enforcement needs to patrol and enforce codes. City is turning into a dump with too many duplexes and rentals.
359	Stop charging thousands for city water that we are forced to have..the costs of everything is up and people are being forced to move, need lights out in faster at Averill and del Prado, it's so dangerous.
360	Cape Coral has a unique advantage of its beautiful natural environment. It is and should continue to be the foundation of our community's growth and success. Let us show the country how to build a sustaining city of the future. We need clean air and water to survive and thrive.
361	Plans need to be built 5 yrs down the road and further. We are already been. Expensive catching up. #paradisecc
362	Still looking for streetlights, sidewalks, and kids going to school by neighborhoods. Also paying fire, police, EMTs and teachers wages that will entice them to come and enough to keep them long term!! Better response to traffic light requests! People's lives are more important than who's paying for them. Put them up and bill it like a code violation with penalties. It will get their attention!!!
363	Parks bond overspending could have been predicted. Going against citizens on the teardown of the original building in the harbor. Same for the project by the Rotary park.
364	The city needs to wake up and look at the infrastructure vs the incoming migration and its associated traffic
365	Homeowner taxes need to be lowered to make it affordable.
366	Websites and documents provided by Cape Coral government is not updated enough.
367	I'd like to see less Dollar stores and storage places along major roads. A walkable "Downtown area along the water" would be incredible. Places with a "beach like" charm would be nice. Clear and clean and healthy water in the canals throughout the City is a must! More trees, therefore more shade and more absorbent during flooding. Thank you!
368	The city is growing too fast. We need to limit the amount of housing/growth.
369	Public transport is generally sub-standard, one emphasis should be a direct line from RSW to at least the CC transfer center, better to city hall; traffic volume and - noise can be terrible (sometimes it feels like I am living inside a race track!), nobody seems to enforce speeds and noise emissions; most major arteries need beautification (compare Ft Myers and Naples), some industrial areas (ie the one between city hall and the hospital) look like a 3rd world neighborhoods - they need real attention.

370	I provided a lot of information in one of the other questions. I have lived in the City since 1985 and I was born in Ft Myers. I am also a City Employee. I have watched our City change tremendously. One issue that needs to be addressed are the boat rentals on the waterways. We have inexperienced boaters in the canals and waterways and they don't speak English and the waterway signs are down. The don't know the waterways or the rules on the water. It's pretty scary being on the waters the past year. Season is starting and our we prepared for what it will bring this year? I hope I see some improvements in the next 10 years.
371	Overall, the city does a fair job at maintaining and developing what has to work with. However, in some instances, such as with respect to the yacht club, the elected officials seem to be entirely out of touch with what the public need and want. Even if with a public need and want is different what they needed and want yesterday. The public has a right to change his mind as the conditions and information changes. Similarly, the elected officials and city ministers have a duty to hear those people out and meet them where they are today and try to solve their issues as they are present it to them – – today.
372	I would love to have more parks for kids and dogs. Also we need to attract more young people.
373	Stop with the ALDIs, Dollar Stores, Storage Units, and vape stores. Bring in new retail. i.e. DSW shoe store, Trader Joe's, Marshall's
374	CC continues to develop at a rapid rate. More housing doesn't make for better living. CC could use more healthcare, police, first responder, education, shopping, and definitely better laws re: the canal system. It's slowly becoming the "free for all" do as you please type of city. Just asking for smarter planning.
375	Beautification should be the number one priority at this stage , after Ian and to make sure we continue to strengthen the real state value that will create wealth in out city's budget
376	They need to stop commercial boat companies from using public boat ramps. There is not enough parking during snow bird season. Thank you.
377	We need more lanes on the bridges to support the number of vehicles!!! This is the main negative of living in CC or coming here for dining or recreation.
378	We need the beach open. 216,000 and no beach. We need better infrastructure...large business development on the parkway is going to severely congest the roadways. Bridges need to be rebuilt. Utilities: Internet service disappointing citywide, electricity too high. Cancel lcec and go back to FPL. Lcec significantly unprepared for Ian.
379	This city should attract more young people and tech industries. Jobs are mostly restaurant, retail and medical. We need to attract more doctors and pay then decently. You have to wait months to see a doctor. Finally, no one should be able to paint their properties eyesore colors like screaming lemon, lime green, peptobismol pink, grape etc. Beautify the medians the city should have the money. The parks are a bit disappointing! Why not have a small petting zoo for the kids, artwork and fountains. We need a beautification manager and a professional job growth task force. Tourism will follow...
380	I Think that the City should put lighting and sidewalks in every block that has Housing . It is very scary when I see a small child standing in the dark waiting for a bus in the grass and on streets .This is Your Job for the safety of all.
381	Listen to the public and lower taxes
382	Mayor and city council in general are not respected and give the appearance of superiority over the general population. Seems as though public input is welcomed, but not taken seriously. Little to no community spirit is present or promoted by council. Maybe the city has grown too fast to have a sense of community- lacks warmth and caring and togetherness

383	The city council should all resign. Time for new blood.
384	The town cannot support the growth. Driving around town is horrendous and you put your life at risk each time. No one can figure out a four way stop. Way too much housing being built for the area.
385	We need an IKEA!
386	City Councilman do NOT listen at all to the people. No matter how many meetings they have with the public they put their nose up and do what they want. It's all for the counselors, and not for the people..
387	Less storage buildings and apartments. Create infrastructure that makes sense for the population growing here. More things for families and youth, educational focuses, opportunities for businesses that cape needs, as well as infrastructure to support people (Healthcare and utilities).
388	The downtown district is becoming too congested! Too much traffic and no parking. More apartments & condos coming in but the roadways are so congested it doesn't make sense to continue to build in the SE & SW.
389	We love Cape Coral!
390	I am strongly opposed to the redesign and repurposing of Jaycee Park. It is opposed by a majority of residents and supported mainly by City Council. The park is literally one of an oasis at the end of a tranquil suburban parkway. I remember first visiting the park over 8 years ago and wondering how long this vista of nature would endure. This is a natural treasure you don't often find in an urban area. It also protects the shore from disasterous storms such as Ian. Once this is commercialized and gone, it will never be replaced. The only reasons I can fathom for its destruction are the usual ones.....money, and favoritism and cronyism. It is by no means the attractive way it could be, but this could be remedied with landscaping and several enhancements. I am disappointed, but not surprised with the Cape Coral Councils' decision to turn an irreplaceable natural asset into a non-desirable entertainment center. You have to stop and think about your net gain of drawing in those looking for such an area to be entertained and spend money, versus the loss of what is best in the long run (or for the short term) for the community. Disappointing, sad, unnecessary, shortsighted, and probably what to expect from those with a lack of vision.
391	Leave Jaycee Park alone
392	I don't really care for the lack of sidewalks in Cape Coral. Especially on roadways leading to and from schools. I see this as a dangerous situation that should be addressed immediately if possible.
393	We need to preserve open areas such as Jaycee Park. When improvements are considered, those improvements don't always need to include commercial aspects. More city facilities to house events and classes are needed.
394	There is a terrible traffic problem. We have enough laws, just need to enforce them, etc. SPEEDING, careless driving, stop light enforcement. It appears our speed limits are just suggestions.
395	Save Jaycee park !!
396	Thank you for letting us participate in this survey
397	No development on red fish pointe!!!! Nononono NO!!!
398	Leave Jaycee Park alone. People in the area love it like it is!!
399	There are too many car washes and storage facilities. The new apartment buildings and residents are going to overload the roads and health care facilities. We need another large hospital instead of a multitude of urgent care facilities.
400	You need to development the roadways for traffic before having more people come here (tourist

	and residents). There is a lot of before work to do.
401	Drive down skyline and Chiquita- many signs are still missing since IAN. When you get to Veterans, signs are missing. Not yet replaced. Please take a look
402	The entire building and codes Dept need to be revamped. It's nobody's job to get the permitting process streamlined but everybody's job to be uneducated, large ego, out of touch and deny and pass it on. Do AWAY with median watering and replace with natural scrapes that only rely on natural weather.
403	Since Ian hit one year ago, there are still missing street signs/traffic signs in Cape Coral. Seems they should be fixed before planting trees in the SW part of the City. Missing street signs cause accidents.
404	There are so many accidents in CC, many due to vehicles running red lights and failing to stop at stop signs. This is a serious safety issue.
405	More police presence in the NW Cape
406	The city needs both short-term and long-term strategic planning devoid of personal agendas and greed of developers. I've lived here 16 years and now see what was once a beautiful city- a city of dollar stores, car washes, gas stations and storage units. Let's do better. Let's save and protect our beautiful green spaces like Jaycee Park and Rotary Park and so many beautiful wetlands. Save them now so we all can enjoy them
407	Need more sidewalks and sidewalks which are not flooded and impassable during rainy season
408	NO MORE CAR WASHES OR STORAGE UNITS !!!
409	The city needs to protect wetlands and hurricane buffer areas. There should be no commercial buildings in residential areas. Council needs to be responsive to voter concerns.
410	City Council and especially the Mayor need to understand that NOT ALL parks need to serve the city as a whole. They must look at regional concerns and desires first. Just because 2% of the population disagree with the City; it does NOT mean 98% like it. Regional expressions should have priorities.
411	Have been a seasonal resident for over 15 years and Cape Coral as changed a lot. Much more traffic and congestion. CC police need to do a better job with traffic violations. People speed, run lights, tailgate excessively and it is extremely rare to see any police pulling people over and ticketing. It is just a free for all. My other home is in NJ with the worst drivers anywhere but Cape Coral is now worse. Overall, I love the Cape and don't agree with those who don't want any change such as to Yacht Club, Jaycee Park, etc. It is important to keep up with the times we live in. As long as development is done thoughtfully I am for it. HOWEVER, PLEASE no more storage units and dollar stores!
412	Don't only concentrate on south Cape Coral. North east needs things going on too
413	The City needs to review codes regarding repair vs. new construction of carports so those of us who sustained damage during the last hurricane can get our carports repaired.

414	I have multiple concerns with the direction Cape Coral has been heading over the past 18 - 24 months. Spending is rampant on a lot of poor decisions. Our city leadership and elected council and mayor are not listening to the community and have worked tirelessly to cripple the opportunities for citizen oversight, accountability and input by abolishing the different citizen- led boards and attempting to eliminate citizen input at council meetings. Our city leaders are in a hurry to spend 10s of millions on development and park projects that are not in the interest of the community and its citizens. Even over $100M on a new Yacht Club development. A staggering amount of people have moved from the East Coast of Florida to call SWFL their new home. They were escaping terrible leadership, overcrowding and rampant development. Cape Coral needs to understand these transplants and our long-standing citizens are not interested in overspending on unnecessary projects and paving over our waterfront. At the current pace of poor decision-making and incompetent budgeting, Cape Coral is destined to be a Pompano, Fort Lauderdale, Coconut Creek or similar. We do not want "paradise" paved over with asphalt and concrete. Please leave our natural scapes as they are and stop deliberately spending millions upon millions of taxpayers' money on items we do not want while deliberately eliminating and undermining our few remaining opportunities for public input. Thank you for your time and consideration in this survey response.
415	Please do not let growth in our city to surpass our current/ growing infrastructure needs.
416	1. Leave Jaycee Park the way it is. 2. Stop building so many apartments under the guise of affordable housing. Rents are very high. 3. Construct an industrial park using undeveloped land in north cape thereby attracting more businesses.
417	Improve street light coordination
418	We have an extremely large city and can't overload downtown any longer. It is time to create a new hub maybe in the NW or NE portion of the city. What are the long term plans to bring in the Yucca Pen property for the city's use? Thanks
419	Please continue to fund public safety: Police and Fire Departments.
420	The downtown area is a hodgepoge. It needs to be redeveloped with a grand vision. A bypass road is required. We should not build a bridge before the CCParkway bottleneck is fixed. Pine Island road needs access roads and grander projects, not another strip center. New projects will look old quickly because zoning promotes disjointed projects. Homes along boulevards and parkways should be buffered, not built right on the roads. Our city is becoming a sea of duplexes that will become under-maintained.
421	Cleaning up the streets and neighborhoods, there should be some kind of consequences for people just leaving their junk out on the curb, or the appearances of homes. Grass not cut, cars parked on lawns,
422	Recently there has been too much HUGE development while sacrificing green spaces. Growth should be slowed down and more attention paid to controlling traffic issues as well as load on infrastructure. I am highly opposed to the proposed HUGE development south of Rotary Park. This area should remain as green space. I am also highly opposed to food trucks at Jaycee Park. This park should remain a quiet family style park with picnic tables and shelters. It does NOT need additional features or a marina/docks. Put money into restoring the Yacht Club Pier instead. Also, NO parking garage at the Yacht Club. Yes, this limits parking but that is a good thing. It is a small park and should remain so.
423	Speed limits need to be reduced and enforced. Red lights and stop signs need to be enforced. Aggressive drivers need to be arrested and charged.
424	Manage growth in regards to current infrastructure. Lack of adequate roads and traffic lights, limited water resources.
425	More industry needs to be brought to the cape so that people are not going over the bridge to Fort Myers.

426	There is enough commercial business, its time to take care of your people housing costs are crazy for those that do work in Cape Coral in education, government, hospital, and retail stores, especially renters and seniors on fixed income. If I wasn't retiring and deciding to move out of state - I could not afford to stay here unless I have a roommate after working for 50 years and working in education for close to 20 years. That is crazy and very sad. Love Cape Coral and will miss it here.
427	Keeping Cape Coral more community like than too commercialized We have Ft Myers, Naples, Sanibel etc for tourism
428	Build streets behind new developments connecting to other streets with no access diectly to pine island road. Without so many entrances to pine island road, it would be safer driving. Close some entrances now allowing for smoother flow of traffic. So many accidents because of this, cars just pull out paying no attention to traffic. Pine Island road doesn't need widened it needs to have traffic redirected to other streets with fewer entrances/exits. Get a traffic engineer who has knowledge of traffic flows. Veterans is horrible because of bad flow of traffic. Cars can be lined up for mile and the light lets 3 cars through so three more run the run as they have been setting there so long.
429	Leave JC park alone, don't ruin it with commercial and boat ramp.
430	My strongest concern is giving the teachers more money better benefits and shorter term to be tenure we have good teachers I want to keep them ty
431	Expand pine island road. It is a nightmare in the Winter. Add crosswalks to Chiquita and Pine Island so I can safely shop for groceries.
432	It's time to restore rules and restrictions to maintain property values. Trucks/vans/trailers improperly parked throughout the city.
433	Traffic is bad and getting worse, no plan to keep walkers and cyclists safe
434	Cape Coral is larger than Fort Myers in both population and area but is severely lacking in commercial amenities.
435	Concerned about too many multiple housing projects affecting traffic and road wear. Too many storage facilities need better guidelines for commercial vs residential vs recreational for future city play
436	Open yacht club beach, tennis and senior center asap. Eliminate any related potential parking fees for town residents.
437	I would like to see something done about the old Cape Coral Country Club golf course. It's an eyesore and yet could be a valuable asset.
438	Storm water drainage in some areas is something that needs to have attention to. Especially at the parks so the kids can continue with activities in between the rain we get.
439	I am concerned that potable water will be treated like gold. The construction is out of control.
440	The real concern that potable water will be scarce
441	Affordable housing
442	The council needs to consider listening to all residents not just the retired or their own agendas or their buddies. It's a disgrace filling in a saltwater canal and place a busy loud car washing facility next to a home not to mention the noise traveling down the canal! Quit allowing multi level apartments next to a residence! If these were your homes you wouldn't allow these businesses or apartments looking over your house. Start making businesses put in turn lanes to alleviate some of the traffic congestion. Why do we invest money in downtown constantly when we have so many other areas like the main thoroughfare Del Prado that should be a focus.

443	Like to see more cracking down on illegal companies doing work without permits or without state license. The hurricane brought them here. They come in and way under bid on us legal companies. This puts a big hurting on your local legal business. There should be a team looking and being proactive on this matter. I am a legal, registered and local GC. I employee 10 cape coral residents and have several cape coral legal subcontractor companies.I have seen so many pool cages go up without permits. Local suppliers parking lots filled with illegal company. Not local. pickup up materials to go do illegal jobs in the cape. There is nothing done to stop it. Instead you have to go down to code compliance and fill out paperwork about everything you witnessed. So that means the person that is filling out the paperwork (which is me) has to be the investigator and follow these guys around to watch them break the law and commit felonies. We pay for code compliance for them to be reactive and not proactive???? Like to see some investment in these issues. I have personally seen other city/counties crack down on these issues. It works and keeps your local business thriving, growing and investing back into the community. Not illegal companies or people.
444	Open yacht club beach already!
445	Curb the wasteful spending in the city government, cut jobs especially at the Police at a management level. Current leadership policies are destroying the city and making it unsafe to live and drive.
446	Youth travel sports including baseball, softball, soccer, and others are a huge opportunity being missed by our city. We have the facilities, but the draw back has been poor maintenance, lack of investment, and the cost to use these parks. Sarasota and Manatee County have tournaments every weekend. It fills restaurants and hotels, keeps kids active, and will help our economy especially in the slower season. A PPP project would be great, See Paradise Sports Complex in Naples. Update Jaycee Park and the Yacht Club, invest in Serenia Vista Park besides a bathroom and a kayak launch. It's an amazing park and property that is being wasted. Seven Islands and Tropicana Park should also be invested in to be destinations.
447	Cape Coral is a wonderful city. Unfortunately it lacks diversity in nightlife for adults 25& up that are not identified as white. More black business opportunities/grants should be developed as well as business mentorship. Also sidewalks for young mothers to take walks and promote women safety. There's land that has collection of trees and between the trees there are man- made sitting areas which causes safety concerns. Lastly Cape Coral police, can they please turn on their sirens when in the community to alert residents that something is happening. There's times an accident happen and I walk into a situation with my children without knowing if it's safe or not.
448	Fix potholes fix traffic and traffic control devices there is a lack of lights at busy intersections
449	I have lived here over 30 years- full time- i'm tired of snow birds running the show and having more clout than us residents
450	Cape Coral needs to work closer with the county on improving the commuting traffic flow for the river bridges. The fact that they both end at traffic lights is a horrible design for volume. That needs significant improvement like a overpass or similar for east bound traffic. The sidewalk project a few years ago that decimated the on street parking was a huge mistake. I am a customer of several businesses in the area and the parking is now horrible.

451	Cape Coral's trash collection is a huge negative mark on our community. The option for people to pile trash at their curb and expect it to be picked up needs to be omitted. If it isn't in a bin, it doesn't get picked up. Large item pick up can be offered twice a year. If people have large items to go to the trash they can call and book a special pickup for a nominal fee or pay a trash hauler to pick it up. If trash is piled at the curb outside of that resident should be fined. People's expectations for what the city wide trash service is designed for is too high and people and businesses (especially landlords) are abusing it.
452	Utilities and roads are not built to withstand current population let alone any growth.
453	The Utility Expansion stuff needs to be addressed. I am in an area that is going to be assessed some ridiculous figure 10 to 15 years in the future. The current assessment figure is not reasonable nor manageable for senior citizens on fixed incomes. If I were assessed at the current rate I would likely need to sell and move away. Presuming an increase when it gets to my area - I am certainly going to be forced into leaving. Why not have a way to start prepaying...maybe a couple hundred dollars a month or smaller figure against a lower cost alternative. The city gets revenue and the citizens get a break because the city is getting money interest free. something to ponder...
454	City leaders who actually listen! Leave Jaycee park alone!!!!
455	I don't feel our council has the best interest of residents, on the top of their list. They do what they want to do.
456	Synchronized street lights
457	Listen to your citizens. The council makes decisions without taking citizens' opinions into account. Specifically Jaycee Park. Leave. It. Alone.
458	Utility and home insurance costs will drive people away fast.
459	I think some attention needs to go towards beautifying what is already here. This is not a pretty city, but it should and could be.
460	Roads roads roads. Work with MPO to secure needed funding. Expand public transit with LeeTran to increase commuting and commercial travel for non drivers. Market what we have before adding more. We need the infrastructure to handle the capacity.
461	Homeowners should have an option of parking their RVs on their property. I'm not opposed to guidelines. But if homeowners, for example, have ample property such as an additional lot attached to their property, there should not be an issue.
462	I've lived here going on 11 years and I've seen a drastic decline in the appearance (junk vehicles parked all over, cars parked on front lawns, people not cutting their grass, trash around the city, junk all over peoples properties… when was the last time you drove down Del Pardo or Cape Coral Pky???? It looks trashy !! So instead of starting new projects let's clean up the city.
463	Concentrate on yacht Basin!! Our only beach area. Fix what's broke in our city!!
464	We need an interstate extension from I-75 via Colonial / Veterans with exits, not traffic lights. Most employment opportunities are in Fort Myers or Naples and commuting time needs to be improved. Cape would also benefit from a Costco.
465	Better traffic management. I feel there should be a moratorium on apartment building until the city traffic engineer can get control of our roadways.
466	Fix what's broken, before attempting any new ventures.
467	STOP the building.

468	Need improved infrastructure and roads
469	After living here for more than 45 years, it's sad to say I can't wait to get out of here. What I've seen in my time of how this city is managed is sad.
470	The current leadership is turning the city into a dump. How many more low- end apartment buildings, 7/11's, Dollar stores and car washes are they going to approve? No cultural arts here to speak of. How about finishing the Go bond parks before starting any new projects.
471	Our water pipes are in terrible shape. We have pipes that keep breaking in the same place which will result in more sinkholes like the one recently on Chiquita. The new apartment/ retail complex on Cape Coral will significantly detract from Cape Coral's quaint charm. The density and proximity to streets is very unattractive.
472	The city can't handle more giant apartment complexes when there aren't adequate jobs and roadways
473	Cape Coral Parkway downtown traffic is overloaded and with snowbird arrival it is utter gridlock yet City is continuing to add more and more residential units without any concern of current traffic issues. They might as well turn Cape Coral Parkway into a mall and quit allowing traffic on it as that will be the only way that people will be able to move down the parkway.
474	City Council needs to quit fighting among themselves and fix the city's storm damage
475	CC was invisible after Ian- we need more positive publicity.
476	Devotees should be held accountable for poor drainage when developing homes and structures!
477	You need to take care of your current residents before you try to lure new ones to the area.
478	Please open the CC beach, keep the Pier and the structure of the old community building and maybe skip the parking garage as it will look awful. Thank you for being there for our community.
479	The city has done a poor job planning the businesses that are already here with an auto store or car wash on almost every corner. Residents deserve to have quiet neighborhoods and not rotating residence with AirB &B s filling up their block. Passive parks, such as JC park should be a place to enjoy nature with walking or biking trails, or just to sit and relax - not a tourist destination! Locals deserve their neighborhood parks, as well as recreation areas to enjoy our surroundings without commercialism. Improvements should focus on the well-being and health of the community, not the whim of a few but the voices of many.
480	Council ignores the voice of the citizens. Decisions are being made that are ruining the future of Cape Coral. This is the opinion of everyone I know. It is discussed in social and group gatherings. Council needs to start thinking of who elected them. Oh and everyone thinks they are corrupt.
481	STOP building homes. Are you thinking about where the drinking water will come from for all these people? More policing of speeders and red light runners. One more bridge to connect FMY. A two lane bridge isn't going to cut it with all these people. Time the traffic lights so they are in sync.
482	We need more things to do. More restaurants and more water centric opportunities
483	Traffic is out of control. This city is growing faster than the roads and infrastructure can handle.
484	Too much commercialization of a residential city.
485	Growth, although expected to some extent, must proceed responsibly. We don't have the infrastructure to accommodate much more growth. It should never come as a result of breaking conservation easements! It's a broken promise to the community it's supposed to serve.

486	No development near rotary Park. We need to protect the animals that call that area home. Also, we need green space to control flooding. Jaycee park should be left alone. There are too many condos etc to put up with all the noise your plan would produce. Plus it's a nice park to walk and sit by the water and reflect.
487	Schools needs to rearrange their traffic flow before and after school start times.
488	Learn from past mistakes of our growing city and plan out Burnt Store RD corridor the right way with commercial and industrial zoning.
489	Stop destroying natural vegetation and habitat that protects our mangroves and wildlife
490	Traffic needs to be addressed. If commercial development occurs in a single area traffic will worsen. We need a strategy that spreads development to lessen the traffic impact. Enforcement of city codes needs to improve. Sometimes neighborhoods look like garbage dumps or storage facilities.
491	Improve existing roadways and traffic control. Cape Cora is famous for red light runners. How much revenue is gotten by traffic violations. If you want to improve revenue, try citing multiple road rule violators with more police.
492	The City is far too developed & unequipped to handle the level of traffic during season. Our city leaders seemed to have learned nothing regarding storm surge risks after Ian. Most people I know have or will be moving out of the city.
493	Develop Lafayette and Miramar as the original plan. If you don't take care of the old before you build new, that will become slum.
494	I believe the city does a good job. Wish the police would ticket more folks who run red lights, speed, etc.
495	Cape coral tends to be too expensive for most families. The employment opportunities are mostly minimum wage jobs so households need 2 or more sources of income to make ends meet. I know several families that have been squeezed out of the area in the past few years or who are living in overcrowded living conditions because they cannot afford anything else.
496	Growth needs to be slowed down and allow the infrastructure catch up. Very poor leadership. Having worked over 30 years in economic development, this economy needs to diversify.
497	Do something about electric, water, homeowners insurance and taxes that are becoming unaffordable for seniors!
498	Absolutely Need back up generators for sump pumps. Reinstating Yacht Club amenities should be highest priority before other development. Look at implementing more an open plaza feel for CCPW/ 47th by having one-way streets… skywalk to riverwalk along canals in area. think san antonio/tampa riverwalk areas.
499	The City is basically a dump north of Pine Island Rd. no code enforcement !
500	City council and mayor have their own agenda and ignore constituents desires. That is sad.
501	I'd like to see a performing arts centre, something similar to Barbara B Mann but with affordable rates for local theatre companies. Protecting and expanding mangrove protections. And affordable housing: city/county owned, third party managed, rent is max 25% of income. This will save people money that they can spend at local businesses or save to start a local business, and this will create a constant stream of revenue the city and county can use to reinvest in communities.
502	No more car washes or storage units. We need more restaurants.
503	LEAVE JAYCEE PARK ALONE!!!!!!!!!!!!!!!!!!!!!!!!

504	Stop the planned changes to Jaycee park.
505	NW needs to be beautified since the taxes paid there are the same as other area.
506	It is unbelievable that the city has allowed the yacht club to literally disintegrate from Ian, it should've been preserved. The pier should've been the first thing built back. The pool restored. The council is only interested in lining their pockets not with the quality of life of the full time residents.
507	Clean up dead trees and broken signage now a YEAR after Ian.
508	Cape Coral is not a tourist destination, it's never really been a tourist destination and I don't see how it can be, unless we either destroy it's natural beauty and endanger it. Cape Coral to a certain extent as far as tourism is concerned has been a stopping point, a base for tourists that come to the area. I can see more Hotels in the Pine Island area, North Cape.
509	On the Nextdoor app, I do see some concerns with roads being flooded due to not having proper drainage, can we get that resolved?
510	Costco and Trader Joe's should be encouraged to locate in Cape Coral.
511	Please 1) bring back the food trucks/scrap the new ordinance re food trucks; 2) do not put housing on the old golf course in SE Cape; 3) do not develop coastline areas that have mangroves; 4) increase the number of green areas and parks.
512	Where is the money coming from for all of the proposed projects that are going on. Finish one thing before you start another. The Yacht Club area should be done ASAP with no fees to park there. Leave Jaycee Park alone for now. I do not want Cape Coral to be a tourist attraction. We have plenty of restaurants with music. No need for an amphitheater near a residential area. We have 47th Terrace for this. Plan a nice recreational area where there is ample space. The City needs to be aware of the income of residents of the City who are on a limited income. The current economy is having a major impact on what people are able to afford … both young and old. There are many things that need to be repaired before spending money on other things. Listen to the citizens before you spend $500k on a project that no one wants. Not everyone in the Cape lives near Jaycee Park. Fix the roads and traffic lights. Clean up the empty buildings. Help people stay in Cape Coral instead of making it impossible to stay. Get federal assistance for infrastructure. Lastly we do not need to spend money on electric vehicles right now. I will be attending more City Council meetings. I am not happy with the way the council is spending money on unnecessary things when we have people who are still struggling after Hurricane Ian.
513	The amount of 4 way stops is insane. Has the city considered round abouts? See example in Carmel Indiana on how it improved traffic flow and safety.
514	Cape Coral have beautiful canals and waterways. These should be explored more. A public beach with easy access would be a magnet and amazing asset to the city, it's visitors and residents.
515	The council person that represents our district brags about how he refuses to communicate with his constituents when they have questions. Apparently this is the unified vision for City Council. City Council is also destroying the few remaining green spaces in the city…… changing zoning so these areas will be developed into high density entertainment/shopping/residential areas. They put out mouth music about wanting citizen input. They then completely ignore citizen concerns. This city has become a swamp of money grubbers padding their own pockets.
516	Make Cape Coral beautiful. Don't cut corners. Our city seems to be behind everyone else in recovering from hurricane Ian.

517	I think we need to address the vacation home problem. These homes are in regular neighborhoods and are frequently very disruptive. These people are extremely loud, sometimes partying, children screaming, etc. They never should have been allowed here.
518	Under this leadership Cape Coral is expanding too quickly. Projects that have been funded in the past are not finished and are pushed to the back like our parks for other big buildings. The Yacht Club project that was just suppose to be a renovation project and was funded now after Ian is a 40+million dollar project and they are still expanding it. What about our roads. There lies the problem. Before all this building takes place you need to put in the infrastructure. Westill have t finished water and sewer.
519	Retain shade & green space in Jaycee Park.
520	Street lights are needed. Need to spread out business & restaurants. Downtown too crowded. Pine Island Road too much uncontrolled traffic. Need more police to control traffic infractions! Make it where you don't have to go to Ft.Myers to shop. #1 - we are biggest city between Tampa and Miami act like it! Stop letting county or Ft Myers control what happens HERE! Harden infrastructure! Why are we still in disrepair 1 year out?
521	We need more walkable areas.
522	The development of South Rotary Park is a big mistake, the degradation of a pristine eco system. Stop this. The development of Jaycee Park despite the objections of thousands of residents speaks volumes about our governments priorities. Buy the golf course for a community pool and your food truck stop. Lastly, reliable mass transit is essential for vacationers, and working class people and students
523	It would be nice if Cape Coral could be beautified. Seeing pawn shops and gun stores as the first thing coming over the CC bridge is depressing. Having an upscale shopping center with green landscapes would be nice, too, like Coconut Point area in Estero. There are too many duplex units, storage units, & dollar stores here. Bring in a Cheesecake Factory and other finer restaurants. Can anything be done to beautify Cape Coral Parkway? Have homeowners take care of their homes. Too many are run down or vacant & some have pools that are green - mosquito infested. Need better job opportunities here where people can earn high paying jobs. Better roads to get to the freeways. Driver training for all who move here. Train drivers how to merge into traffic and not just stop. Train everyone to pull off to the side when emergency vehicles are coming. Seems like people don't pull over or care to get out of the way of emergency vehicles like ambulances and fire engines. Also, training for boaters.
524	It seems you want to bring more people to the area, but are not looking long range. More people means we need more police, more firemen, more hospitals, more teachers.
525	We need a moratorium on building apartments and housing
526	I'd like to see a follow-through on projects that have been approved and not have so much time pass that new city officials come in and change the original plans.
527	Tourism is important for our area. But what exactly does Cape Coral have to offer? Not Fort Myers or Sanibel or Captiva, Cape Coral? We don't have a beach. Cape Coral yacht club is a joke. First, we need to take of our land, our environment, that includes our waters. Next is our infrastructure. Our roadways need much improvement. I have lived here for 30 years and the last 3 years has seen major growth that Cape Coral was just not prepared for. I believe we should start with our community needs before we think about northerners.

528	It took our small business 13 months to receive a simple Cert. of Occupancy in an existing building we only moved furniture into. We did not even paint the walls, move or remove any structural aspects or even replace the flooring. Our small business works with many other churches and small businesses in our town and the amount of harassment and targeted inspections to get simple CoO is outrageous. Yes, there is huge growth here and some delays are expected, however, there is also a huge turnover in the permits dept (or they are just not able to do their job effectively, either due to computer/infrastructure issues, or labor shortages. We are going to start loosing very good businesses in CC if we don't get a handle on the ridiculousness of our current permit/inspection/building situation.
529	I have lived here for 30 years
530	I realize we had a major hurricane one year ago today but you need to make repairs a priority for companies that want to invest here. Green street lights on CC parkway still in dis repair. Crooked and twisted street signs everywhere. Common areas still with down trees. All this beautification makes a difference to people wanting to invest
531	safer roadways and school bus stops!
532	Jaycee Park: The CITY is NOT listening to the RESIDENTS!
533	Code enforcement needs to be either enforced or rules need to change ex; boats in driveway. Better chain restaurants need to be encouraged to come ex; PF Changs More traffic lights Downtown needs a complete overhaul, it's not inviting to look at & regulations for music, bars etc., needs to be updated as the community is changing. People should not have to leave the Cape on weekends for a decent type of nightlife. Put a pause on Storage places, fast food & dollar stores. Get a Costco and a Superwalmart in the NW corridor. Put a stop light at Knotts Rd & Pine Isl Rd.
534	My concern is the utilities as we develop, and especially in the north west and north east wells are not being managed well and our water plume is being drawn from to deliver to other areas of Cape Coral, which is causing our Wells to dry up. Also understand the natural ecosystem of mangrove trees, but there should be an area designated for water access to enjoy the ocean water as opposed to just one access point on the river. Many complain that they have to drive an hour to a beach.. land use is another concern as development of residential continues. The roads and infrastructure need to catch up. There should be more lights now at major intersections where residential has been developed, and there should be more consideration of child safety when going to, and from a bus. Keeping Cape Coral, a destination spot is crucial to our future and growth. However, we need to make sure we maintain its charm. We need to have more action when natural disasters strike we need to have the city be an active agent on behalf of homeowners and businesses, to help the process of rebuilding and clean-up. And wink news should not be the only partner residence feel they can go to to expose issues that they are dealing with.
535	As I stated before, the school drop off/pick up lines are terrible traffic jams!! Bad idea!! This should be solved asap
536	Leave Jaycee Park the way it is
537	Training your employees to understand the demographics of our community
538	Road traffic
539	1. Need bus stops update 2. Add more play ground for kids in the parks -too small. 3. Add more bank seats and bikes stations at Cape Coral Blvd . 4. More lights in the North Cape 5. More attention to the North area for developments 6. Need a Garden - Culture place 7. Need college, University 8. Need public bus in the North area extension 9. North Cape needs more attention

540	Think about the development of Nw cape to maximize tourism with 7 islands coming in.
541	More new business diversity. More trees. More entertainment. More infrastructure to draw tourism.
542	We are missing parks with walking trails, kids events, shopping. Any sports equipment have to go over the bridge. Most shopping over the bridge.
543	We do not need "affordable housing " here in cape. There are plenty of neighbouring communities that are less expensive to live in. People choose to live here and pay higher taxes for a reason- affordable housing while is beneficial to many good people will inevitably bring in more rift raft.
544	We have lived in the Cape for 20 years in a home approaching $1mm in value. Yet, we have "trash" neighbors (I've. Those who disregard codes and don't respect their property and community). The book "Lies that came true" shares a community history of development that continues to this day. We have City leadership that talks and plans and plans and plans... And we end up with crap. By the way, I am surprised you include amongst a limited number of perspective questions about continuing education prospects. This, in my opinion, does not need to be a focus for Cape Coral. Focus instead upon creating a quality CLEAN community where people want to live. Embracing technology's changing paradigms in education, business, retail, housing/neighborhood, and recreation should be able to the priorities. Why do or do not people want to live in Cape Coral?
545	Road safety is a huge issue and needs to be addressed. Leave some green space in Cape Coral. Please stop paving paradise! Compared to other cities there is a lack of greenery here. The water in Cape Coral is horrible and makes people sick when they drink it. I can't even let my dogs drink it or they get sick. Fix the basics to keep your residents happy!
546	We need green spaces for our health and for wildlife
547	I strongly oppose development and destruction in areas with mangroves and endangered species like what happened at the Rose Garden. Leave the environment alone.
548	The community is not happy! You forget you all work for we the people. It may take a little time, but we will be sure to have each and everyone of you removed!
549	This city has way too many car washes and storage facilities. It is really the city joke. We are in favor of code enforcement BUT it must be selective because there are homes in our area they should be stopping at to get them to clean up their yards constantly and the city just drives past. There are plenty of recreational parks we really don't need more. The children have Plenty of parks to go to. We have a very large population of older citizens that would love area's to enjoy recreation. The main priority now should be the beach.
550	Leave Jaycee Park alone!!!! The food truck park at the foot of the Cape Coral Bridge was an absolutely TERRIBLE idea in an already congested and difficult to navigate area
551	Put solar lights at all of the bus stops if these children sit on the ground by these bus stops it is difficult to see them. Solar lights would be cost effective and keep the children of Cape Coral safer while waiting for their bus. Several of the street lights were knocked down during the hurricane and a lot of neighborhoods are dark which invites more crime opportunity. Put more Solar lights in dark neighborhoods
552	To keep up with autistics becoming adults adult services need to abound. There is nothing, no dentists no adult day programs, no assisted living for those with disabilities.
553	Fix the signs, buildings, piers etc. before planning any other multimillion project projects. Jaycee Park is wonderful just the way it is. Leave it alone!

554	I think the downtown area is very well developed and extremely crowded and hard to get around. The roads obviously are issue with the volume of traffic and could be larger and any new roads built should be built with that in mind. We also need a more direct line to the expressway route 75, we are very much cut off from quick access to that thoroughfare.
555	Cape Coral needs to put its citizens ahead of all else. Good public policy does not produce the kind of unfettered, dangerous development we see in our City. The quality of life here is deteriorating because priority is always given to more cars and traffic, instead of to quiet, walkable streets and generous green space. Poor planning choices continue to result in another homogenous, ugly city that matches the low expectations of our elected representatives.
556	Atlanta GA is a good model for ideas. Consultant's that don't know the area should meet with full time residents for input at your Cape Coral city hall so verbal ideas can be heard.
557	Affordable housing! White collar jobs!
558	Cape Coral is a very difficult to pull permits, get inspections which helps with upkeep on homes and value. Bad reputation with contractors and homeowners. Only think of land development and not the consequences to wildlife, schools or traffic. Traffic is horrible! Speeding and accidents are horrible. Don't just blame snowbirds (which I'm not) it's a bad mix excessive speeders and slow pokers.
559	This town need to look better - litter pick up, trees and shrubs on roadways and cleaner downtown streets.
560	Cape Coral needs to draw large corporate entities to the city. The main driving force of the economy cannot be construction/real estate and retail and restaurant.
561	I think we need to worry about the traffic ways and schools and bringing larger companies for employment. We need to make sure we are zoning the areas to also keep it the wonderful small town feel if possible
562	60 year resident, too much government and many fees has destroyed our freedom. Reduce the size and control you have overreached. We can't afford you. Growth brings crime as well.
563	I do these surveys but our city council ignores the people and appear they couldn't care less about what we, the people paying for their rampant spending, want or don't want.
564	Cape Coral is ugly. The first impression of the city coming over the Cape Coral Bridge is uninspiring at best. The downtown area must be more cohesive and beautiful. Right now it's a mish mash of ugly mid 20th century commercial architecture that sheds a bad light on our city. Further out, zoning has created a confusing mix of residential and commercial use on main streets. This should be tightened up so there is better definition of land use on the main roads. This would probably help the traffic situation too.
565	I think that those opposed to the development of Jaycee park are a vocal minority. I'm excited for it.
566	Improve the medians in North Cape along roads like Diplomat, Andalusia, Kismet, etc. And fix the potholes on Diplomat! Just repave the whole thing at this point. Wheel alignments aren't cheap.
567	Need more education and commercial/industrial tax base.
568	Na
569	I fear we will lose Jaycee Park as we know it. Please leave it as natural as it is. Take the development ideas to any other park or find a new one. Those of us who have been here nearly 40 years have lost the things that brought us here.
570	Commercial development should create a destination, especially downtown.

571	There are too many apartment buildings going up and the roadways cannot manage all the traffic. There are not enough businesses in place or things to do for the locals. It looks like the city is greedy and just wants to throw up more housing units and not thinking about how the city can handle all the traffic and lack of jobs, education, entertainment. Look at Naples, Bonita and Estero and take a hint on how a city should be managed. The medians are ugly as well. Pick some palm trees if you are trying to attract tourist. Stop being cheap. The city looks cheap and yet it's expensive.
572	Cape Coral needs to build a community center for youths. Perhaps a joint endeavor with the county to build a complex like the one in North Fort Myers.
573	A cap on the price we pay for water assessments would be great!
574	Flow of traffic on some residential streets is too much SW 10th Street for example, cut through traffic volume is high and noise levels and speeding is rampant. We need to do something to stop this.
575	We do not need any more dollar stores, car washes, or storage units. We need planned and organized neighborhoods and business areas. Stop mixing land use. Make this town feel like one. Stop putting restaurants in established neighborhoods. Prioritize making this town feel inclusive yet compartmentalized. Clean out drains in the neighborhoods. Flooding is a major problem because it's not kept up.
576	Cape Coral city Government need to listen to the people that they serve instead of lining their own pockets and their friends pockets. The Yacht club beach needs to be prioritized and opened as soon as possible.
577	Try listening rather than pretending to hear what the people are saying
578	No need for more parks at the moment. Until parks are close to capacity, what is the point. Bigger things lack currently. I think most would agree that the traffic is insane and needs to be dealt with.
579	City Council is a clown show.
580	Why isn't there more sidewalks on every street? This would help people treating their yards like parking lots. So trashy
581	The cost of living in Cape far exceeds income opportunities. Need more higher paying job options. Housing alone is very expensive by comparison.
582	This is not a small town anymore, no matter what the citizens think. Rezone the city so that development of commercial spaces is conducted in an orderly fashion.
583	Cape Coral doesn't have many comfortable places to just hang out. Too many bars. The bike paths need to be cleaned up.
584	Start a project and finish it before going to the next.
585	The city council is horrendous. They are trying to turn Cape Coral into a Pavement jungle eager to make money off residents and tourists alike. Many of us moved here for the natural beauty and it breaks our hearts that are concerns are not addressed. Keep the nature. Keep the small town feel. What Orlando and Tampa and all those other overcrowded noise circuses have the tourists. Keep Cape Coral a cozy residential Community not some idiotic circus full of too much traffic, noise and concrete. Our roads are already overcrowded and full of potholes. And when are we getting our beach back? We don't need a freaking parking structure. We need a quiet little riverfront beach to hang out with our family and friends.
586	We have become a VERY NOISY city mostly due to inconsiderate drivers with illegal modified

	exhausts and huge subwoofers (also illegal) that can be heard from great distances and it is ruining any quality of life for the residents. It was quieter in Ft Laud ..
587	Why do all officials want to destroy the natural environment in one area and then create a man made "green" environment in another. Political motivations should not make the politicians rich. They should be Stewart's of the land and protect it.
588	The city needs more upscale / high end retail stores and restaurants - keep the money spend in the Cape instead of giving it to Fort Myers and cities to the south. Stop building storage units and car washes! Keep full time residents in mind, while balancing the needs of the snow birds. Roads, utilities, and internet to work from home are important.
589	Changes need to made to the mayor and City Council. They are non-responsive to citizens, secretive, entitled and are only interested in making personal money off the backs of the citizens.
590	The CC I moved to a few years ago is rapidly disappearing. The quiet, slower paced community is being replaced by rapid development and rising costs that are making it unaffordable for those who have called it home.
591	We need more trees and more substantial parks. We need more public space by the water. The beach isn't close and the Cape Coral beach is closed, so anywhere that people can recreation outside with tree cover so it's not so hot would be welcome. We need some miles and miles of jogging trails. Lakes park is a perfect example.
592	Holiday short term rentals are a problem. Minimum 1 month! They are noisy and disruptive to resident home owners.
593	We need to slow building in the cape until we figure out what the nw area water situation wells are running dry and it takes forever to get someone out to drill
594	The roads need expanding to accommodate the growing population. Novel ideas are needed to build expressways and flyovers in order to ease traffic congestion. Cape Coral needs to move from under the shadow of Fort Myers. We should be the star of Lee County not to be treated as the red haired step child of the county. More police enforcement of traffic laws.
595	Traffic is a major concern
596	Cape Coral seems to be just a huge neighborhood on steroids with no cohesive attributes. Area needs beautification such as landscaping, canal clean up and a shopping mall. It's just block after block of partially developed sun neighborhoods within one huge unfinished neighborhood for lack of a better explanation. Work on hurricane repair and planning for future hurricanes. Install tons of landscaping and just beautify the area. It will never be a tourist spot due to its lack of beaches. Make it a beautiful place to visit or live to start with. Maybe develop the areas with water access as marinas. Fishing charters, etc.
597	Desperate need of affordable housing. Those that work here can't afford to live here.
598	Need to attract more businesses to working age residents to live and work in Cape Coral. Traffic and tourism should be a focus. Less restrictions on short term rentals.
599	They need to focus on infrastructure and quality of life for residents. Without easy access to HWY 75 we will never be a metropolis, so quit trying to make us one.
600	The need for an appreciation of our unique environment and a willingness to preserve the land is so important to our quality of life here.

601	I feel we are not a destination but rather a peaceful comfortable stop/stay that is close to nearby destinations. Yet we are affordable. Pump up our industrial sections for people to find jobs. Try to connect our residents not overlook them nor their opinions, they are our base after all. Life is not always - about money. Safety and belonging are basic needs for a town. In fact, safety we have in spades with our CCPD. All comes from the top down on values, priorities for its citizens. Don't over stretch our town to lose its humanity, nor environment - please.
602	No more apartments and multi family housing. The roads cannot handle the traffic.
603	Continue to focus on modernizing the downtown area. Strongly suggest converting to asphalt vs. concrete for roads as it provides a better more upscale appearance. Clean up our road medians; Kamal Pkwy, Santa Barbara, etc. Add curbing and consistent landscape maintenance. We are a proud town and appearance goes a long way to enforce the pride of our citizens.
604	Please stop and THINK about what you are approving for development on our precious limited land. NO MORE cheap nasty, low grade buildings. You are turning Cape Coral into a trashy place. We have enough gas stations, massage Palours, storage facilities, crappy stores. There is so much wasted land for total crap. What we need is HIGH END cultural venues. Parks, concert venues, bike paths that actually are attractive and away from roads. Central places of activity. Look at West Palm Beach. Something with a real "central" feel. Look at Tampa. Beautiful downtown walkable area. No cars. Look at Venice beach with miles and miles of quiet safe bike paths. A sidewalk along a busy road DOES NOT COUNT. In conclusion let's class it up CC. Let's reject the crap and only approve high value community projects. We have enough infrastructure and housing. Now it's time to add things to actually do.
605	Homeownership is a stabilizing factor in the strength of a community. The rental housing is booming because teachers, firefighters, city workers cannot afford to own homes. Seasonal rental is a very different animal than the ordinary rental market. Landlords do not maintain properties giving the City a bad reputation.
606	Why does council spend so much money asking what we think and then ignoring our responses and do what they please.
607	Personally, I do not feel the city government takes the citizens opinions, comments, requests or complaints seriously. I do not feel we are heard or that things are done to repair or upgrade when necessary.
608	No to Redfin development. Leave our conservation areas alone!
609	I have concerns regarding the impact of increased traffic due to the numerous apartment communities being built in Cape. I am also concerned with the lack of sidewalks…too much focus on bicycle lanes and not enough sidewalks.
610	I would like to see more sidewalks.
611	I don't think existing areas zoned park and recreation should have housing built on them. There is plenty of other land for that. I would make a Marina and promenade in the Rusty's parking lot. It would connect to the water through Founders Park. A parking garage would replace the lost parking spaces. It could be like what Fort Myers did next to the Luminary Hotel only with boat slips too.
612	Beach and pool necessary
613	Police have been turning a DEAF EAR to noise enforcement in both CC and FM. Getting real old getting woken up at 2AM by rude skanks.
614	The downtown needs an ongoing effort to make it more appealing. Eventually, more parking spaces, make every weekend a trolley event, more water features in parks everywhere, canal improvement (extend Rubicon to Bimini Basin, continue 47th Terrace streetscape to Hampton. Incent businesses to clean up facades.

615	The city is lacking green space
616	Zoning (a duplex next door to a business next door to single family) Office and doctor offices on Bimini Canal this is the crown jewel as the beach is. Make it a destination to go to not to visit my proctologist
617	Cape Coral was never intended to be a commercial or economic hub of anything. Overbuilding will destroy this bedroom community with overcrowding and traffic. Once a nice place to live, not so much anymore and the mindset of our leaders will destroy what was intended by the founders.
618	Cape Coral has become a victim of its success. An attractive climate and location are overrun by VRBO rentals, pricing working folks in Cape Coral out of owning housing, unless they are knowledge workers working from home at NYC/SF/Boston rates. Curbing VRBO operations will help somewhat in keeping CC housing affordable for my neighbors who work for a living here, not just on the internet. We need sidewalks in residential CC so children can walk or cycle safely to neighborhood schools.
619	Keep up with traffic needs/NW needs parks/waterfront development needed for residents and tourists/more restaurants on the water needed
620	Businesses (not just stores) so people can have gainful employment. Roads are falling apart in the north and in desperate need of beautification. We need a Costco. Less money redoing downtown Cape for the 100th time (even though the current plan is terrible with no parking)
621	Address the concerns of the people who live here and pay taxes to support these services you want to provide. How does it look to tourists who rent vacation house and walk in backyard to view canal and there are port-a-potties still in the canals! People who work here can't afford to live here, address this issue! Food truck in park is wonderful but no one can afford to use it but tourists! Roads are in terrible shape (except Burnt Store), fix these. Seems like City has lost touch with the taxpayers and is only interested in tourism and big development
622	Would like to see investment in city that would make a better place for current residents, not focused on substantially increasing population
623	Traffic issues need to be addressed with additional multi use buildings. An outdoor outlet mall would be nice so we didn't have to travel to Estero. Need more healthcare options-other than Leehealth. Would be nice to have other hospitals come in for some competition. Currently have to travel to Westin, FL to the Cleveland clinic for heart health. There needs to be more community colleges available. I think there should be another bridge built to Fort Myers with growth exploding as it is.
624	At present there is no City of Cape Coral- nothing but investor's and tourists and special interest leaders! No neighborhoods or real City
625	A city of this size and no homeless shelters??? Affordable housing for elders consists of ONE building that had a two- year waiting list before it even opened. One hospital for a city of 200K+ is a disaster waiting to happen, especially since the Cape Hospital is the worst in the Lee Health system. Until a solution to the traffic congestion on Del Prado and Cape Parkway is found, no more downtown development is possible. I'm waiting to see what a mess the new bridge will cause. You can make a bigger bridge, but the traffic still has to feed into the same size streets. Stop building more apartments until you have a sewer and water system to serve the north city area or we will be up to our ears in sewage.
626	Roadways and sidewalks are a concern for me. I've lived here for 24 years and the number of people and kids that are killed or injured on Roadways is preventable. This should be a priority.
627	TAXES, thru homeowners, fees for water, etc. are far too high to the average retiree that lives here year round. As someone that will not have a big retirement fund, I will not be able to retire because of the high cost of Taxes.

628	Clean the canals after hurricanes. The porta potties in the canals for months on end are shameful and the contractors letting/throwing trash in the canals without any penalty is also shameful. You care more about collecting tax than you do keeping the canals clean and they are what makes this city attractive to vacationers. Get your act together.
629	Need better control over short term house rental
630	Regarding #2 and infrastructure, Cape Coral needs to be more responsive to traffic and citizen safety. They need to install and maintain traffic signals, bike lanes and sidewalks.
631	Our roads are crumbling. They have too many potholes. We can't grow without maintaining them.
632	Do not want Cape Coral to turn into Miami. It's why so many of us moved here
633	City leaders who actually listen! Leave Jaycee park alone!!!!
634	Cape Coral really needs to concentrate on its infrastructure, it can not handle what it has and there is more and more commercial and residential building going up, which will only make this problem a lot worse.
635	The city needs to bring back the Budget Review Committee. Our citizens need to oversee what the Mayor and Council are doing moneywise. Also raising the fire assessment from 62% to 70% should be on the ballot so citizens can vote on it. We were told in 2013 it would be such a small amount we wouldn't hardly notice it. That is certainly false. You are taking advantage of us taxpayers with increasing stormwater fees etc. Telling us Jaycee Park is going to be a LOAN that we have to pay off for 12 Million - This is taxpayer money and I don't want to be paying on something that we don't absolutely need with the Yacht Club and beach still needing rebuilt.
636	Gas station needs to be added North of Kismet on Burnt Store
637	Also badly needed is a decent sized strip mall that can house a supermarket, pharmacy, restaurants in the NW. The closest is Burnt Store and Pine Island, and that's a trip and a half.
638	Making driving safer. Education development for our youth. All of Cape Coral is in need of activities for our kids.
639	Stop construction of all these duplexes!!!!
640	Need a second downtown in the Northern section of the city.
641	Zoning of the city isn't working for example all of those duplexes on skyline don't work they should be commercial lots. Downtown is coming together with the cove but we need more of those condo coming downtown to really create a city center
642	Installing reliable broadband will support technology and other businesses which are desperately needed to expand jobs and opportunities. The tax burden is weighted too heavily on residential and needs to transition to commercial. Finish amenities and park projects that are already approved. Put them on the fast track.
643	Tourism is out of control. Houses are being sold to corporations and rented short term. Our neighborhood is full of Airbnb homes and the inconsiderate renters come in for the week/weekend party the whole time. I have lived here for 29 years and it gets worse every season.
644	Save Jaycee park. We need greenspace
645	Growth that maintains or lowers tax rate is preferable.
646	It would be great to see some nice restaurants instead of fast food. More shopping. Traffic considerations. We love the Cape!

647	The infrastructure needs to be addressed. When I first moved here in 83 the population was 40k. Now it is over 200k and main corridors like Veterans Pkwy, Pine Is Rd, Cape Coral Pwy are overwhelmed. The streets feeding into these roads like Skyline, Chiquita, and Santa Barbara are not able to feed traffic in smoothly. An example is having to wait at least two light changes at Veterans and Chiquita at 8:30 and 3 :30 respectively. You need two left turn lanes from Veterans into Chiquita. And consider a traffic light at SW 20th Ave and Veterans or a roundabout.
648	Fix potholes in roads. Fix road signs, many still missing from hurricane. Sidewalks.
649	Why are you commercializing out city parks?
650	I would like to see our cities walkability improve. Also improving traffic - not by widening roads - but through incentive for non motorist transportation. Bike paths, walking bridges, and linear parks improve traffic without the need for accommodating more motor vehicles. We also need more green spaces. I am completely against Jaycee park's renovation plans and believe it goes against the parks and rec motto. Parks are enough, they don't need bars and restaurants and boat slips to be a great park. People need nature in their lives, more so than just mentally, we need it to cool our soil and capture carbon. Every inch of soil lost to concrete is contributing to a climate issue that cape coral promised to address. We need more native trees, not specimen trees or signature trees from other parts of the world. we need to realize we ARE an ecosystem and not just living next to one. We need less storage spaces and car washes and more affordable housing and public transit, we need so much more than I can list in an online survey. We really need to think about what we are doing with this city and what it should stand for. Instead of a grocery store or convenience store in walking distance from the"affordable housing" on pine Island road, I saw a car wash. What a monument to our failures of infrastructure. Build affordable housing that is actually affordable and finish the sidewalks, make bike paths that people will actually want to use, and please consider the infrastructure of these projects before building apartments with sidewalks to nowhere and car wash storage unit vistas.
651	The infrastructure has been ignored in favor of development and financial gains. We are in desperate need of hospitals, good specialists, GP's, all healthcare.
652	Something needs to be done regarding the rent prices that are insanely high and over priced
653	The city needs to make sure the public is informed and included in the decision making process.
654	I would love to see &I think Cape C lacks a downtown are with shops not just restaurants along 47th. When you 1st come off the bridge and around cape coral parkway it's very old and run down looking. This is the gateway to the community should be fresh and new with shops and look welcoming, which it does not.
655	Answer calls on water leaks and trash pickup.
656	The city needs to realize this town is where people live-it's not meant for tourists.
657	Please open the beach. All other beaches have been opened in Lee and Collier. Tourists have no reason to come to Cape if our only beach is closed. It's an embarrassment.
658	Cape Coral is a pre platted community and lacks open green space for carbon sequestration and stormwater runoff relief. Nuisance flooding will only become more of an issue for the future of Cape Coral. Focus needs to be on providing citizens more green space, forested areas, and adhering to lessen coastal development for sea level rise resiliency.
659	We are over crowded and under employed. Please no more storage units, dollar stores, or strip malls.

660	We need more trees and reforesting for quality of life. Cape Coral is hot and dry and not beautiful. Less urban sprawl, more focus on developing areas that are already developed and closer to city center for a more sustainable future. Focus on restoring wetland and preserving green space so the water that floods the roads during even a simple rain event has somewhere to go. Protect our coastal areas and mangroves to reduce future storm surge impacts.
661	Why are there so many apartment complexes being built? The roads are already full enough plus the water situation (water usage is going significantly up) is not getting better. Also those complexes are being built in residential areas with single family homes. It attracts more crime to the neighborhoods plus the above mentioned problems.
662	Redfish Point should NOT be developed! Jaycee Park does not need the massive changes proposed. Removal of Australian Pines ok, if replaced with native plants. Upgrade playground.
663	We have water restrictions yet we still keep building. We will be building new bridges and have the same traffic conditions on Cape Coral Parkway. Why do we need a lane for parking for westbound traffic in the downtown area, when there are parking lots on the other side of the businesses on SE 47th Terrace?
664	A concern I have is the old commercial building that are not being repurposed while new construction is taking up green space- I fear we are on our way to be a concrete jungle
665	We keep maritime business opportunities from growing...we have zero public docks or marinas (yacht club marina was a joke)..how can the booming fishing and boating tourism succeed here?
666	Family education is the basis of our culture, it would be very important to support families to understand that living in an educated manner is a perfect balance since a more educated family is healthier and requires less medical assistance, if it takes care of the environment it requires less maintenance and if there is more love, it is obvious that there will be less hate
667	Sometimes government wants to change what works. Maybe the focus should be on things that are not currently working. Don't try to make Cape Coral a big city and remove the neighborly aspects that have made Cape Coral desirable.
668	Better city planning in regards to living communities. This includes ensuring their enough grocery stores for the additional housing. Also there is not strong retail merchants. Upscale shopping to help pull in tourist money as well as be a destination.
669	The traffic is getting worse and worse not just doing the season. Pine island Rd. needs 2 more lanes in each direction, plenty of room for it. The overpass on Veterans over Del Prado needs to be replicated for each major road and it needs to be at least 3 lanes the entire way.
670	Get federal money to offset the 40,000 it will cost to hook up to water and sewer. Ridiculous to make people pay for this
671	Improve traffic flow: intelligent traffic lights up and down Del Prado, side access roads on both sides of Pine Island Road, more canal bridges to reduce traffic congestion and unnecessary traveling.
672	The city's infrastructure is very poor. It has not kept pace with the increase in development. Residential roads are crumbling. Sidewalks are almost non-existent. It is dangerous to use the roads for walking, cycling or driving. Very little traffic enforcement. I feel these must be addressed before more development is allowed.
673	Please don’t change JC Park, it is perfect as is.
674	Our roadways are not set up for the amount of traffic. The city is spending too much on things like Jaycee Park and the Yacht Club than lights and roads that need to be taken care of. Priorities are messed up.

675	Raising bridge heights and increasing gulf access to more properties in NW Cape along old burnt store road (North of Caloosa) This change will also provide water access to Fire Station 7 to all of NW Cape canals. Need new NW access point (spreader) to Charlotte Harbor. Increased boat traffic and the development of the seven island projects present outstanding growth potential but also waterway disaster if not addressed in advance.
676	PLEASE do something about the outrageous speeding on Del Prado. 20mph over the limit is ridiculous. Why aren't cameras installed and sending tickets? It's the same cars so you know they're locals.
677	I was born and raised here and I've watched our transition from small town to a booming, well known city, but I still have to travel to Fort Myers for a lot of things. I would like to see some of those things happen in Cape Coral. I love the Christmas Tree Lighting and movie for the kids, so if the city could do more events like that through the year for the community, I think it would be awesome!
678	Leave Jaycee park alone!! It's the only place in the city where you can run, walk, sit and relax, read or do anything in a peaceful shaded settings. Do not ruin it with bars and food trucks.
679	The city needs to crack down on the efficiency problem; we look like Miami, and I don't see the city work on this problem
680	Planning is off the rails. Every corner has a dollar store or storage facility. Neighborhoods need infrastructure and beautification. Storm damage needs to be repaired. A MODERN LOOK needs to be applied it is disjointed.
681	Development of the city is so far out of control the leaders can't keep up as it is now. Northwest Cape is like the wild west with NO presence of code enforcement anywhere. Trucks, trailers, campers, boats, non stop blaring music, garbage and rats everywhere (Yes, before Ian) No street lights, no sidewalks. On a plus side, those WITH wells had water after Ian and those on CITY WATER came here for showers. So Utilities being on the top of this survey shows what you really want to make money on.
682	Have required septic tank checks and require people to have drained every two years like we did in Wisconsin. It's gross thinking how many septics they are craving in to North East cape.
683	Housing is outrageous AND code enforcement is not strong enough
684	I feel that Jaycee Park should remain the way it is. I have lived here 27 years and Jaycee Park is a wonderful place to go to for a peaceful walk. We don't need food trucks.
685	Quit spending our tax dollars on your pet projects!!! Ask. Taxpayers what they want.
686	Please leave Jaycee Park alone. We have no other space like it. It's the only place to go that has shade. Lots of groups use it. Maybe find a way to add parking and do something productive with that large field, but don't cut down the trees. Work on the downtown area.
687	Stop the spending of millions of taxpayer dollars on projects like the commercialization of Jaycee Park at the expense of losing the peace and serenity that the park provides, without offering a referendum vote to the citizens of Cape Coral!
688	Please don't ruin Jaycee park. We Don't want food trucks and boat ramps. Instead focus on maintaining the trees, bathrooms and playgrounds that are already there.
689	Please stop storage development let's get more business along with restaurants. This way residents don't have to go to Fort Myers to have a nice meal
690	We need beautification of streets, especially Del Prado. Do not spend any money doing anything to JC park. It is fine as it is. Spend the money elsewhere

691	Short term goals are non-existing. Traffic light enforcement and speeding is out of control. Wastewater treatment where our new development rather than well and septic. Residential multi-family development is out of control. CC IS A DEVELOPER AND BUILDER CANDY STORE.
692	Do not destroy Jaycee Park for the profit of outside developers and vendors. It is a park for the residents of Cape Coral, not a performance venue or a food court.
693	Stop growing temporarily until infrastructure and drain problems can be resolved. Including traffic
694	Need more natural parks & nature in general. Also need more sidewalks on major roads especially within a mile of a school. More thought needs to be put into roadways before approving commercial construction (need more lanes or additional lights before businesses are built).
695	The residential housing boom and the huge influx of apartments are straining the roadways. Growth should pay for growth, impact fees must be re-instated. Lacking a major highway, rail, or port commercial business opportunities are small. we are a bedroom community to Fort Myers, embrace it.
696	Why doesn't the council listen to the citizens. Truck stops, yacht club, Jaycee park... We need another hospital system here. Lmh is not taking care of our citizens, they have broken their charter agreement.
697	I love Cape Coral but it lacks beauty and culture. There is a definite need of trees and plants all around.
698	This city cares only about how they can make money for the City Council. They are intent on changing protected environmental areas to create huge tourist developments. Once citizens become aware of these developments it is already a done deal. The City offers bogus “forums” or “surveys” so citizens believe their opinions are valued. Believe us…….it is simply mouth music to shut the citizens up. No doubt this survey is a huge expense that will NOT honestly share how citizens feel about how this City disrespects it’s citizens. Our particular city councilman brags about how he NEVER responds to his constituents.
699	Cape Coral needs another hospital and increasment in public transportation options. The increasement of population does not match the capacity of the hospital. Also, a community college or a campus of FSW could include a PTA program only available now in Keiser University. The dental assistant program in FSW is also reduced capacity. The increased population and age of retired people, require more health coverage in these areas. Any development in these areas, will also increase job opportunities.
700	So many new builds whether don’t plant the required trees, or they are planted under telephone wires, or they are all dead within a month after c/o because of neglect.
701	When people voice opinions you should respect, support and consider supporting the people and not private agendas
702	Help the tax base -business- a downtown area not the same old urban sprawl we have. - education and research facilities
703	I have been here 42 years and every project the city does is a disaster.
704	Keep taxes reasonable
705	I have two major thoughts on this - first, we need to protect our wetlands and not allow corporate greed to destroy what we have. Specifically, we need to preserve and protect our wetlands, our mangroves and other vegetation - trees.... Second, when allowing more development (only in areas designated appropriate) we must be careful to prepare the infrastructure so that we don't create an overcrowding nightmare. We need water, sewage, ROADS that can accommodate the proposed population BEFORE we allow more building. We need to do what is right for the residents of Cape Coral, not what is most economically beneficial to a privileged few.

706	Other than working for the city or Lee Health there are no real good paying jobs in our city. You have to go across the bridge for the better paying jobs. People have the conception that everything is better on the other side of the bridge.
707	People are leaving NYC because of traffic congestion and high prices.Backups create anger and stress which is unhealthy to the human body. Many in D.C. have moved to Northern Virginia or over to Maryland. Millions of dollars in wealth is to be returned to humanity soon in the form of millions of dollars per person. This will create big traffic jams because of the free time passed by humans. Each American will receive $13.2 million over eleven years recovered from the evil Vatican and hidden bunkers worldwide. All underground bunkers have been destroyed that contained 40.2 billion tons of good food to feed the creatures underground. The people will soon be told...Global Intelligence.
708	Less apartment complexes. They are built for flippin' by big Corps... in 10 to 15 yrs they do not care if they turn into slums. The residence are a drain on the school systems and Medical facilities, they do not pay taxes, like home owners do.
709	I've lived in CC for over 30 years and visited as a child in the 1970's. I've been in SWFL for 36 year's total. We need more parking at smaller businesses. We need more flex space for small business. We definitely need more entertainment venues. We need a real mall and more chain restaurants like a Cheesecake Factory. A year round indoor farmer's market would be great. We need to better promote tourism and small businesses. We need more outdoor concerts with security measures. We should be hosting more street fairs and festivals in the winter at Sunsplash, the German American Club and Mid Cape in general. We should be training up the next generation so I definitely like the ideas around more vocational schools and colleges etc. Gated communities would be nice too on city water and sewer on bigger lots and not cookie cutter. I've seen CC featured three times over the years on HGTV. We need to promote stuff like that when it happens. Showcase our city more. We could use more places to host events, or co working space. Better communication via social media about new things opening in the Cape, proposed projects and opportunities like this to give feedback. Thank You.
710	I've lived in the Cape for just over 18 months now and bought a home near Jaycee Park. I'm shocked that the City Council is trying to do force through all these changes to it. Not only will it ruin the purpose of the park, there are MASSIVE opportunities and needs elsewhere. Why not beautify the blight that is "downtown"? Take a look at Punta Gorda, Naples, Bonita, etc vs the old, tired horribly designed downtown we have. I watched the city council meeting in which the mayor commented that only 2% of the population had spoke up about Jaycee Park. That is the most insulting and ludicrous comment I've heard some really dumb things from politicians over the years. Listen to your constituents who live by and are most affected by these decisions and expenses
711	I am adamantly opposed to the direction that is being taken with our Parks. We need these Green Spaces. We also need to remember the impact of taking out trees and how it affects the wildlife. I would also like to more improvements to dog parks.

712	This city was built on a swamp. It was made as a plan of urban sprawl and overdevelopment. It was a boom town that actually worked, unlike it's nearby neighbor, Lehigh Acres. Once Cape is overdeveloped and more strip malls and plazas are vacant, it will be rife with crime just like there. It has no close proximity to highways for easy commuting. Traffic is a nightmare, flyovers are needed, not more traffic signals. Education is slipping and pay here is abysmal. A city cannot expect to sustain unless most of its tax revenue is business based. Taxing and fineing the residents makes it an unhappy place to live. Having inadequate infrastructure and homes unable to reliably get well water or even keep water flowing in existing homes, yet all these builders somehow still being approved for permits in NW. There are no major attractions, museums or cultural draw. I don't agree with a man made beach that will ruin the ecosystem of the entire bay and the livelihoods of fishermen and island people who were settled here long before lots in Cape Coral were being given away on The Price Is Right. Locals leave here to go to Ft Myers, Naples and Punta Gorda for their entertainment and events. We don't need more houses, more overdevelopment, more paving of paradise, more tearing down the waterfront nature, more Walmarts and strip malls with nail salons, more lackluster bars and trashy casinos and smoke shops. Any other state would have four separate towns in the land mass and population area known as Cape Coral. It is now just a greed monster that cannot effectively meet the needs of its citizens in order to be an enjoyable place to live. Not to mention our utilities are way higher than Sanibel, Pine Island, even Bonita Springs, and they are lacking. Time to really invest in the town and it's people rather than sell it off for a profit. I give it twenty years until it is run down urban sprawl full of crime.
713	Leave Jaycee Park alone
714	City leaders are idiots. They ruin parks and don't listen to residents.
715	Allocate funds, time, and manpower to repairing / fixing the things that need to be fixed / updated (city water, drainage, extra lanes on roadways). Stop allowing apartments, duplexes, and storage unit construction which is ruining the homes and peaceful lives of full-time citizens. This place used to be peaceful as little as 6-7 years ago. The government has allowed too many people and too much expansion to ruin what was tranquil about this beautiful city.
716	Leave Jaycee park alone, we don't need anymore food trucks!
717	Improve public transit. Make ACTUAL bike paths. PLANT MORE TREES!!!
718	the city is having a very hard time keeping up with the growth. building /developing in the City is a very bad experience. i have been in the City for 23 years and have built 5 buildings and purchased a 6th. each build got harder and harder to deal with the City due to the City not being able to navigate thru the growth..
719	I really don't like the look of high rises or the lack of parking. It's seems things are developed & then there are problems related to it. Please think hard before developing we all have to live with the consequences
720	If you want to go out for the night in the Cape, you have to go "downtown" Please develop the NW just the same as "downtown" for the population that is moving here. Dow town is old and needs a facelift. Pine Island road between Chiquita and Veterans is the way to go !
721	Cape Coral needs a town center or outdoor shopping just like waterside shops. Bring in the luxury stores and high end shopping. This will entice other commercial shops to bring their stores to our city. We are in huge need of more stores. NO MORE CAR WASHES OR STORAGE UNITS! They are tacky and minimize the beauty of Cape Coral!!
722	Stop building apartments, they are making clogged roadways even worse.

723	The number one priority for infrastructure should be basic road repairs. Roadway beautification would be nice, but must be proceeded by the basics like fixing potholes. Additionally, something needs to be done with the speed and process by which building permits are handled in this city.
724	The yacht club needs to be demolished rebuilt ASAP. That is a huge tourism area and Cape Coral needs it. The beach needs to be fixed and more restaurants or a hotel, along with community aspects such as the pool and splash pad need to go in that space ASAP for tourism for the Cape.
725	Clean up the streets. The drugs are bad, focus on developing rather than selling land to build more houses. Appreciate the south cape and do everything you can to bring back the vintage charm that drew everyone in. Find the schools and the healthcare systems. They're terrible.
726	Quit spending money we do not have. How about mote traffic police to get these uncaring drivers in line with tickets or off the road.
727	With all the apartment buildings going up, we need a bridge to Fort Myers. Traffic across the bridge is near impossible in the mornings and afternoons. I can't imagine how much worse it will be when more people start moving here.
728	We don't need any college or low income housing. We need ALL parks up and running including yacht club beach area.
729	Need a pool
730	We are turning into a concrete jungle. Save what makes Cape Coral beautiful, don't need all this real estate
731	Youth centers and daycare facilities
732	Too many apartments! I'm concerned about water, traffic and the overdevelopment. We don't have the grocery stores or roads to handle all of the overdevelopment with apartments and the city does NOT listen to our concerns. Residents had wells running dry but yet, just more and more apt. buildings were approved. Some council members never respond to residents' emails and concerns. General feeling is the mayor and council don't care what the residents think.
733	It would be nice to see commercial development bringing jobs to the area that support the increased cost of living and allow our residents to work where they live instead of having to drive elsewhere. Standing water in various neighborhoods after storms is also an issue. Limits on Airbnbs
734	Cape Coral is lacking in activities to keep people here. It is one of the most boring towns for having so much waterfront. It has no culture or education to draw people of substance to the city. A major university or cultural center would bring higher level jobs and entertainment to the city. The city is ignorant to how magnificent this city could be with city council members that are trying to make it more affordable instead of trying to increase the clientele that should be here.
735	Town centers throughout the city, better development along Pine Island road that doesn't LACK parking, bike bridges over useless canals, sidewalks throughout the city for children to walk to their school bus stops. Seriously no more strip malls. Small shopping plazas that lack parking don't serve the needs of businesses now and won't serve any purpose in the future. Del Prado and Santa Barbara are good examples of what not to do.
736	Need more space for light/heavy industrial. Also need to realize that with the land area of Cape that multiple "town centers" should be considered when we talk about "downtown" development.
737	We need to fix the roads and traffic issues before this influx of population grid locks on our way to jobs in Fort Myers because there are more job opportunities over there.
738	We need more focus on improving roadways, disparity between cost of living and income, and improving healthcare/education ease of availability. Less focus on so many beautification projects and tourist attractions.

739	Traffic is horrible. Need a bridge in the northern sw. To Ft Myers.
740	The downtown area is not centrally located and has no real anchor. It's weird. It's more like Old Town. Retail/hotel with conference center/family fun center near City Hall would be awesome.
741	Just think the government need to listen to the residents of Cape Coral about Jaycees park and the yacht club Ball room. Last survey by the Breeze showed people strongly against the demolition of the ball room. I think the counsel members just do as they please. And this is a way out for them for neglecting the Ball room. They need to be voted out.
742	I like the way our city works with our citizens. Law abiding with minimal crime is a huge plus! Roads need to be repaired more permanently. I live on the NW side and our new bicycle street corners have dividers at intersections which means people in wheelchairs have to go out into the road. Why?
743	City is growing rapidly. However good high paying industries or jobs are not in Cape Coral and are not being pursued.
744	We have to figure out how to keep moving Cape Coral forward without over taxing the residents!
745	More people the roads, so more maintenance needs to start happening!! I have been here 8 yrs. And the infrastructure is starting to look like Illinois!!!! And who in their right mind would spend $50,000 on ugly Art piece in the middle of the round about????? Stupid!!!! And let's not even talk about the money spent on the round about??!!! Wasted Money spent once again!!!! And what about the kiosks on 47th Ter. Cape Coral doesn't even have enough community events or places to visit to warrant the waste of money!!!! And the waste of money continues!!!! I think this survey is just to pacify the citizens who are enraged by you people and your horrible choices!!! I don't believe anything will change!!! But I guarantee the next election the people will be heard!!!!
746	Infrastructure development and maintenance should come before any "beautification" projects. There are too many badly maintained roads, canals, etc. Affordable housing is non-existent. Employment opportunities in Cape Coral that are more than minimum wage are also scarce. Virtually impossible business codes are discouraging, if not prohibitive. Oh, btw, Pine Island and Matlacha should never be absorbed by the city.
747	I have lived in Cape Coral for 43 years We do not have enough roads for all the cars people will be driving when they move into all the apartments. Del Prado and Cape Coral Parkway need to be widened. We need more and better public transportation
748	Too much commercial building. Need better traffic flow especially during school hours.
749	Need to keep GREEN space for just nature lovers and quiet space. Dont need a Park on every corner. Don’t need more bars along the river for drunks to have boating accidents. Currently adding 120 seat bar at end of Coral Parkway and boat slips. Leave Jaycee Park alone. NO BOAT SLIPs, not bandstand no bars needed there. Is community of condos.
750	Used to be proactive care of problems. now reactive which is not good. the problems will mount with the boom. Where’s all this new money going.?
751	Costs for water and sewer development should be determined by the linear feet in front of a person’s lot NOT by number of 10,000 sq ft lots a person owns. Costs should be kept as low as possible by using Special-purpose local-option sales tax (SPLOST) to fund water and sewer projects.
752	Having lived in Cape Coral for 40 years, I feel the development is hodgepodge and incohesive- strip malls with empty stores, duplex construction invasion that adds no beautification value. I would like to see Cape Coral offer something unique either commercially or recreationally for its citizens as the largest City in SWFL, I think it can do better to be a destination rather than a bedroom community.

753	Re-surface parking lot behind Iguana Mia. All other parking lots around this one have been renovated.
754	The city is allowing extreme growth, but has done nothing with the roads and infrastructure
755	Its growing faster than you can handle which never ends well
756	More and more younger people and families are moving to Cape Coral. There needs to be more places that are modern to cater to this generation like a co-working space, a town center, social settings like armature works in Tampa, more bars on pine island. Also, a better pick-up and drop off system for schools. Lines are outrageous to drop off and pick up. There should be some sort of cell phone lot like the airport schools can have where cars can wait rather than lining up on major roads and backing up traffic. Those cell lots could also serve as a recreational space for pe for schools to get double use.
757	I feel that they are more interested in big corporations and not maintaining our beautiful natural areas. Stop developing everything
758	Preserve Conservation Properties, do not rezone them for development. Conservation easement surrounding Rotary Park needs to safeguarded, not violated for private development. NO Development at Piney Point , as it is currently zoned conservation. Do remove any trees at Jaycee Park, rather plan more trees at that park. Do not destroy the shoreline at Jaycee Park, keep it as it is.
759	The water that is wasted on irrigation is ruinous. STOP IT! The overspending of the current administration has been questionable at best, criminal at its worst! STOP IT!
760	No more car washes or storage areas! Move quicker in general. Permitting is horrid. For goodness sake, why don't we have a Costco!?!
761	More options for middle and high schools closer to Pine Island área. Better parks with walking trails and play areas maybe even kayak launch points.
762	The current city government does not listen to the citizens. We need more town hall meetings council members need to attend our community neighborhood association meetings. We only see council when they are canvassing for votes. Listen, listen, listen, and act according to the people you serve
763	I think the city is lacking entertainment for young families, there are no places to take kids between 6-15 yr. for fun. Streetlights are poor. We lack sidewalks and bike roads in most of the neighborhoods. Also, the commercial parking is not enough for big trucks. We need several yards close by to be able to park trade vehicles
764	I think the city needs to slow its growth! They are making too many mistakes that are going to cost us money down the road!
765	Yacht club beach / park needs to be finished asap .. big decrease in tourism from the damage to Sanibel Fort Myers Beach, and Cape Coral Yacht club .. many people looking to other areas of the state this season .. rental reservations are real low ...
766	Lack of parks and outdoor activities for children & the community. Planning to destroy the most beautiful and peaceful park in Cape (Jaycee Park) to commercialize it.
767	Stop building storage facilities, commercial buildings near residential areas and duplex!!!! Before starting a new project finish the one you've started.
768	We cannot continue to develop without new roadways. Traffic is a nightmare!!!! Water supply is a nightmare. And NO MORE APARTMENT COMPLEXES
769	Why would you bring a firm from failed democratic states to develop our community, get local companies to do these studies ridiculous that my taxes are being wasted with companies from the outside, keep public transport away from Cape Coral

770	Wider sidewalks but have them only on one side of the streets. Red light cameras and fines. More city water.
771	Stop anymore apartment complexes
772	Something needs to be done to ease traffic as the population increases.
773	There are too many apartment buildings! Too many rentals bring down property values. Need more senior condos. Need more police! Response time is way to long. They need to pull people over. Need better streetlights. And better safety around roads that lead into canals. Nicer kids playground with spay park. New York has more than here. A nice Kids science Museum. Better schools. And make Jaycee Park nicer spray park. Not food trucks or Marina or bars.
774	Too much overbuilding
775	Cape Coral was never intended be an industrial center or a vacation resort area. Instead it was supposed to be a cohesive community
776	No more multi-family housing, strip malls, car washes, storage facilities. Need more green space, greenways, corporate headquarters, opportunities for college grads. Keep Jaycee Park as a neighborhood park, not an economic opportunity.
777	Would like to know more about what recovery opportunities the city is taking advantage of
778	I support Cape Coral developing and looking to the future. I love the new amenities being considered like Jaycee park and the food truck park. Let's have more clothes shopping, maybe a small mall or outlet mall. Keep it coming.
779	The city should focus on primary employment and quit focusing on strip malls and low wage retail. Attract high end retailers, restaurants, etc. Taking over trash service is a horrible idea. Again, less government.
780	Stop removing our history. Quit building apartments until roads are able to handle them. Leave the parks alone
781	Please leave Jaycee Park alone! Don't spend my tax dollars destroying this beautiful space.
782	Cape Coral wants to grow yet they're building department/permits is the worst in the county. They need to hire more and step up their game and timeframe for allowing residence and commercial to grow and get past the ridiculous permit status.
783	Stop with the storage facilities all over the place. Bring in real businesses that promote development. The vast Improvement with the use of bonds for parks has really made a positive impact. These parks are being used by families and it's wonderful to witness.
784	Not enough attention is being paid to multi-family locations and traffic everything the city is involved with takes a ridiculously long and still here are complaints about inspectors dealing with and slowieng down contractors
785	Residents need parks that promote nature and provide a respite from the business of daily life. Traffic is a burden and residents across the city complain constantly. Also, the huge apartment complexes bring many new school aged children and the schools are not managed well with regards to where students attend in relation to their housing. Too much bussing and too much time on the bus. We are concerned as well that the Hospital on Del Prado is stretched too far with people. We have heard of emergencies being sent over to Ft Myers. The current Mayor and Council are spending money like it's water. We are not in support of 12 million being spent on

	with our property taxes but then spends money in other areas. It's wrong. The Yacht Club park, Jaycee Park and Rotary Park are seeing overhauls which residents are not in agreement with AT ALL. The salary for the new City Manager is ridiculous and an 8 year contract. Tourism? There are too many Airbnb/VRBO rentals at SF homes and condos. This needs to managed better. These SF properties should have guidelines such as minimum 30-day rentals. It is not fair to residents when homes turn over with nightly stays or weekly stays and the homes and condos are being used for partying with no consideration for those that live and work in The City of Cape Coral. We have lived here 15 years. We bought our home anticipating retiring in the Cape. Now we are at that age and thinking we may need to look elsewhere. Our friends are all saying the same. Very sad. We need better leadership. Sally and Pete SE Cape
786	I would like to see a city manager with more qualifications on running a city of our size
787	WE ABSOLUTELY HAVE TO CLEAN UP & DECLUTTER THIS CITY. It's beginning to have a "thrift store" image. When driving through It's beautiful for 2 minutes then BAM run down, trashy yards and unkempt homes and businesses too. There's garbage and trash out in lawns, streets, sidewalks, driveways, parking lots 7 days a week 365 days a year! Trim some of these overgrown bushland trees creating messes all over this town.
788	Something needs to be done about the high rent costs People can't survive with low pay and high rent
789	We only get one chance at doing things right in this city. Let's make sure it makes sense and the people we are taking money from to build all this stuff, we need to make sure in the long term, if these are business we should be doing business with? I believe the citizens should be able to have imput on all these companies as well. Unfortunately most people don't pay attention [?]At the same time the city must pay it's bills.. But at what point are we the people paying to much?
790	Need to attract good paying jobs/industries. More car washes & storage units are not those industries. Get some restaurants in NE & NW
791	Need to bring in larger companies that employees hundreds of people instead of strip malls that only employee a few hundred people.
792	Whatever developments are made, there has to be changes/upgrades made to the roadways in order to handle the increased population.
793	Everything can't be a store or a restaurant. Set up some kind of a parcel land for manufacturing office, some tax credits, etc. and get some manufacturing here. Restaurants and stores can't be the only jobs here.
794	I don't believe the City Council listens to its citizens and there is very little transparency. It feels like most members are into new development regardless of the impact it has on the community. Some want CC to become "Disneyesque" without regard or respect for the segment of the population that desires a focus on protecting the environment and ecology, and conservation preservation. Before long much of the greenspace that's left will be paved over. There needs to be more focus on hurricane preparation and resiliency to protect residents from storm surge like resulted from Ian. There is already a great deal of development underway in downtown CC and in other places with no apparent resolve of the increased traffic problems it will produce. I applaud leadership for this strategic planning effort and I will be interested in reviewing the results of this survey and seeing how the input is incorporated into the plan. Thank you.
795	We need to encourage high tech industry, expand our trade school, maintain our wetlands and stay out of the acquisition of electrical and sanitation utilities.
796	I love the new ideas for the Cape bridge and Jaycee park - however if you're going to remove trees, please put up some kind of shade
797	Keep up the good work!

798	Instead of houses upon houses and more houses the city needs a professional advocate to encourage hi tech and medical research companies to open in Cape Coral.
799	Traffic is horrendous. Too many people moving here at a speed that the city wasn't prepared for. As tax payers it would be nice if we didn't have to pay to enter our town. Too many dollar stores and storage facilities. Middle class is being pushed out by unaffordable housing projects despite every one of them "affordable luxury apartments," taxes and insurance along with inflation is hurting homeowners.
800	Leave Jaycee Park Alone. Spend money on more Parks in the North
801	Keep the natural aspects of Jaycee Park. Do not commercialize it or try to develop it as a boating destination. Do that at Bimini Basin or at new parks.
802	Continuing to offer business incentives is great!
803	As the NW keeps growing there is a growing need for infrastructure at an affordable price. Assessments are driving people out of their homes. Water and sewer should not have to cost a second mortgage.
804	Don't let developers into Piney Point, that's conservation land for a reason. Raise the bar for development of Academic Village. Keep the bar high at 7 Islands by requiring public spaces and a public destination, not just a condo enclave for the rich. Keep any large city owned properties in reserve for future development, no need to sell everything off to developers for them to just build boring apartments without an affordability requirement.
805	Traffic in the winter months. traffic lights and road signs
806	Overpopulation due to high rise development. Traffic issues, especially speed enforcement.
807	Patty Cummings should be removed from the Council and her vote should not have counted in the removal of our previous City Manager. You all should be ashamed of yourselves.
808	Cape Coral wants to renovate Jaycee Park for $12 million dollars in tax debt. Over 5000 Cape Coral residents have opposed this renovation by signing a petition. We do NOT want this tax debt by allowing alcohol sales, boat marinas, concert halls, water park features, food trucks, traffic and crime in a neighborhood park. City leaders are not listening to voters…these proposed park changes should NOT BE APPROVED.
809	Traffic speeds are a concern. We need more commercial tax base to support city services
810	1 year after Ian, there are still PODS, trailers, over grown lawns and abandoned homes all over the Yacht Club area. Where is code enforcement? When are home owners going to be held accountable? It looks like a 3rd world country.
811	Reduce property taxes by 50% since so much building is going up. Between property and sewage taxes plus homeowners and flood insurance are pushing the established residents out of Cape Coral. City of Cape Coral inspection department needs to improve by 90%. Do the right thing the right way! Stop passing inspections when something is wrong with the property! Make it mandatory to build residential homes and commercial buildings 12 feet from ground to do flooding. Stop building homes and businesses and start thinking of building schools. Correct how children are picked up and not waiting online on a street blocking traffic. An accident is waiting to happen!
812	Current council members appear to not value the community or the people's needs. Disbanding volunteer advisory boards and allowing new car washes and storage facilities on every block sends the message that the council is not in touch with those that live here.
813	Just moved here. Love what I've seen so far. Trying to help family members move here. Love friendly people that have been helpful to someone who just moved here

814	I am concerned about the mayor and town council pushing their own agenda. They are spending taxpayer's money on projects that we don't want or need. We have no curbs or sidewalks and they want to destroy parks.
815	Removal of abandoned boats or squatters living on non-running boats which pollute our waters.
816	Roads need to grow with the growth of the city
817	Open the Yacht Club Beach!
818	We need more roadway/traffic safety measures. The trucks and trailers are unsafe and dangerous. Laws are not enforced to prevent unsafe vehicles on our roads! Stop allowing massive living facilities to be built. Our communities cannot handle any more. The school bus situation is an embarrassment-as well as the pickup and drop off at our schools. Is anyone paying attention to this problem?
819	Lack of respect for our ecosystem and natural protections of wildspace will be our downfall in the face of impending climate change. Embers Lakes Estate should have never been allowed. We had a real opportunity to preserve Cape Coral's first pioneering homestead, coupled with the natural beautiful of 8 clear lakes and walking trails. It would be our cultural gem, giving a true space to rewild within the city and escape the hustle. We fumbled our own Lakes Park and the last wild space in Cape Coral as a whole. I am so disappointed that a city with such biodiversity continously favors the dollar which will be our ecosystems demise ultimately leading to financial ruin. I cannot wrap my head around it. Leave Jaycee Park alone, increase the trees. The Australian pines and mangroves are doing an excellent job of maintaining the coastline. Every "park" within the city is an overly manicure, plastic perfect. We are humans, we need real nature. You've replaced grass for children with fake turf. It's asinine. Jaycee Park is a classic gem, please focus efforts on downtown or northern developments. Also, stop gatekeeping dog parks. There should not be a pay wall preventing pups from play. It is a huge hindrance for our tourism. I've been to dog parks in all 50 states and not a single one behaves like ours. Plus, for a city of this size, we should have a dozen more. Please leave Four Freedoms alone too. It's the best Park in town. Also, our RV ordinance is outdated. Let folks own things. For a city all about being American and our freedoms, we sure don't allow our citizens to govern themselves.
820	Cape coral is beautiful, but we need more jobs that pay in parallel to cost of living. Many jobs are in service industries like restaurants, cleaning, chain stores, etc. But $17 per hour where median home prices are 300k plus just don't go together. People are getting priced out of paradise. Cape coral also needs another hospital. 300 bed hospital in a city of about 200,000 people is simply not enough.
821	I've been visiting Cape since 1988, and a resident since 2003. Affordable housing is the current #1 problem here.
822	Concern regarding sewers, water and canals.
823	Infrastructure is the toughest hurdle in my opinion. We have sink holes & pot holes. We have a hand full of north & south roads and east & west roads.
824	We do not need any more storage facilities or car washes. Please provide road improvements!!! Traffic is brutal at all times of the day. It should not take 20 minutes to go 4 miles. The roads are also falling apart. We also need more shopping opportunities - we have no mall, and have to go to Ft. Myers or further to shop at many stores.
825	No longer have lcec and just get FPL directly. See more community events. Have activities for families, our city has had alot of families move in. More places for small businesses to rent.
826	We need to back off the multi-family apartment projects. The original design of this amazing city does not want that.
827	Leave natural parks like Jaycee alone.

828	Maybe build more bridges so we can have more roadways that go across the city. Commuter traffic is terrible, especially in season.
829	I am sure you need input as the City hired you and you are not from Florida and have no idea about Cape Coral. This is evident in your questions. We do not need more development, we need to preserve what we have …. I am so disappointed in this city. Newbies have ruined my home.
830	We absolutely need an overpass at Veterans and Santa Barbara, Veterans and Country Club Blvd., Veterans and Skyline. Chiquita in the future. Traffic to Ft. Myers and throughout Cape Coral is an immediate problem that needs to be the top priority.
831	Cape Coral lacks neighborhoods with identity. We need sidewalks with shade, front yards with plantings and gardens (not grass), and places to walk or bike to in every section of town. The downtown/47th area is coming along, but you can't walk anywhere on Pine Island Road. We need walkable neighborhoods, green space & pocket parks, mom and pop shops. Please no more storage units or dollar stores.
832	I saw this consultant go on and on about the need for retail. Nobody can afford to live here on retail salaries. We need stable employment with salaries in line with the cost of living.
833	Water issues are crucial for Cape Coral. Resources should be geared at facing algae blooms, clean canals, plant more trees
834	Do NOT convert to electric cars/trucks
835	It has become much too expensive to live here roads can't handle the traffic paying you 10 percent of our electric bill is non sense soon will be like California not enough water or electric we are becoming a City only meant only for the retired richy riches but we don't have the jobs for working families and the rules trying to make the whole city like a gated community.
836	You're not listening to residents as it is. You seem to have a preconceived that aren't necessarily in-line what citizens want. You ask what we want & think & then just ignore us. No effort to compromise or take suggestions into serious consideration. You act like you know better than the citizens that elected you.
837	I am horrified by your planned changes to Jaycee Park. As it exists it is truly a neighborhood park, which it is correctly classified as. As you don't seem to care what the "oldies", who I should remind you are a key reason for the growth of Cape Coral, you should build a park with all your plans in an area where it is wanted/needed. Perhaps in the "cool moms" neighborhood???
838	With all the development, roads and traffic are a primary concern. It has become increasingly difficult to travel from the SW section of the City to the Cape Coral Bridge through Downtown.
839	Cape Coral needs to preserve what little history we have left along with growth for the future. We need to take advantage of the waterfront for public access while also preserving out wetlands and mangroves that provide protection. I like the plans for the pickle ball center. We will also need more hotels to keep up with tourism. Trees. Trees and more trees.
840	I believe in growth, but the infrastructure needs to improve in order for this to happen.
841	Cape is creating beautiful luxury waterfront living, yet lacks what that lifestyle enjoys outside of boating. High end retail clothing. All the way to Bonita or Naples for good shopping. BHWM, LuluLemon, Versace, Gucci, Chanel
842	Affordable housing is important if we want workers to be able to live and work here, and also affordable transportation not only for workers but also seniors.

843	We could really use a Costco here. Less chain stores and more individually owned businesses, especially clothing stores.
844	The city needs to focus on proving affordable/workforce housing or instilling rental stability laws. We are rapidly losing working age individuals and families due to the high cost of living, extremely high (and continuously rising) rent costs, and jobs that don't pay enough to meet the increased cost of living. There is an overfocus on the government's part to cater to tourists and push developing the city into an urban space like Miami or Orlando instead of finding practical ways to elevate what was once a thriving retirement community that focused on bettering the lives of its citizens.
845	My opinion is we need more full time employment available. We have plenty of restaurant and medical just not enough office and industrial. Lets keep those who live here working here with good wages.
846	I have lived here my whole live and my parents and my grandparents. I grew up listening to stories of how clean and clear the river was. How my grandfather and his father were able to get mollusks off centennial park. I grew up on a canal seeing turtles, manatees, alligators, birds, catching crab and redfish off my dock. Today I'm lucky to see a turtle and no longer fish off my dock as its nothing but cat fish. As a teenager the city came in and ripped out all of the mangroves and replaced it with seawalls. So for the last 20 years now we have seen a steep decline in the health of our river and the population of marine wildlife and the animals who rely on marine wildlife. These mangroves provided a nursery for young marine life to flourish. They also allowed filter feeding marine life a home to grow and remove impurities from the water. The mangroves themselves as well. They also provided shade to keep the water temperatures down and provide shade and protection for other animals. The city and state for the fact is so concerned about finding a contract to clean the water ways with manmade inventions when Mother Nature was doing it long before and quite effectively. Without our waterways cleaned and the abundance of marine life people will look for other areas of the state to call home where they are not concerned about the marine life coming from the river or the safety of swimming in the river. Providing waterfront homeowners the chance to come down and purchase a couple of mangroves for their docks will drastically improve the quality of the water. There will be logistics on manicuring the mangroves to keep them from the boating way but that is a small price to pay when what is at stake is devastating.
847	More emphasis on open space
848	Improve the roads before allowing more development
849	Would appreciate if the speed limits were enforced. Have not seen a raider unit on Cape Coral parkway in years. Everyday someone passes me doing 60+
850	Very much against the proposed development south of Rotary Park. The area needs to remain as a wetland preserve.
851	its not Miami - stop trying to make it one.
852	Better "Welcome to Cape Coral " signs at all entry would be great.
853	Why does every blade of grass need a building on it?????????
854	Repair Yacht club and beach area before building new places. Clean the canals, medians and streets. Don't rezone green areas & natural areas
855	I feel that the Cape Coral residents should not have to pay for the city water expansion. Or at the very least the cost of this project per household should be going down. Considering all the new properties and taxes the city is collecting

856	We have one beach, one pier and one yacht club which the city has totally ignored. This is a disgrace. Please put fixing this area in the top of your priorities. It should have been done by now.
857	The current pace of growth in CC is unsustainable and unhealthy for the city in the immediate and long term. The infrastructure in place is woefully inadequate to safely and effectively handle the volume of people, water and waste let alone deal with record tourism influxes. The quality of life in the Cape has deteriorated to the point that the benefits no longer outweigh the costs. It is inequitable. City resources, staff and services are no longer capable of keeping pace. The impacts of Ian and the delays in permitting for residents in need of repair should be an indication of that. Until that is remedied, it's very unlikely that the results of this survey could successfully be acted upon. It's time to manage CC's growth in a PROACTIVE fashion, and stop reactive.
858	I'm a Florida native, but have traveled the whole country. Compared to every other state in the US, Florida has one of the most unique ecosystems and geographical position. Land and wildlife (both aquatic and terrestrial) need to be protected if Florida has any chance at maintaining its tourist and agricultural economies in a sustainable way in the future. The health (or habitat loss) of many species does effect human health and wealth. The minimum adherence to biologically sound city planning regulations is not enough. Please consult the science behind urbanization effects on wildlife, landscape, and microclimate/temperature throughout the city.
859	I believe the current thinking is very narrow. We don't need more condos and air b and b. We need affordable housing and commerce developments so people can actually live AND work in Cape Coral. Having business help support the tax burden will increase ability of affordable housing . Healthcare isnt growing as fast as the cape is. Most of FT residents work, shop and see Drs in Fort Myers, that's ridiculously short sighted of our current government.
860	Development should not obliterate our green spaces. We need those too.
861	We have become increasingly concerned that the roadway and utility infrastructure cannot meet the ongoing increases in population. That employment opportunities mostly relate to tourism and service industries is not healthy long term. The current approach to city government is not professional and forward thinking enough to handle what is to come.
862	The current infrastructure cannot handle the huge influx of new residents, yet the building of huge residential complexes continues unabated. Among other things, the traffic nightmare must be addressed. In addition, the abandoned boats in the waterways is hazardous to marine life and residents. Why does the city of Cape Coral do nothing about them?
863	We have plenty of parks in the Cape. I'd like to see Jayce park left exactly as is (from someone that frequents often and loves the peace and tranquility of the layout). I don't like when commercial spaces/profiteering are given out to private businesses.
864	Quit taking away all the Historical Buildings and Areas.
865	This city needs to focus on more green spaces, repairing street signs, side walks & bikepaths. Stop overdevelopment & focus on repairing the parks you already have! Plant more trees! Stop wasting our tax dollars on needles projects that create more traffic, pollution & encroachment of critical wildlife habitats! We don't have the infrastructure in place for more development nor do we want more commercial spaces with dollar stores, car washes and/or storage facilities & their exaggerated paved parking lots radiating more heat into our atmosphere in the summer!!! You need to focus more on building a resilient community and create infrastructure to mitigate climate change!!!

866	Would please fix or remove the Chiquita lock.. the safe harbor marina members as well as any large boat down the spreader have been held hostage since Ian. Frankly… it's a gross display of our tax dollars. Also, a good public meeting on zoning regulations might not be a bad idea….
867	It is amazing to me that the city council is almost on the wrong side of every issue that comes up in front of them. They need to start listening to constituents more, and they need to start acting like government that is for the people and not for themselves.
868	Nice to see you are showing concern for public input. The city must get ahead of roadway expansion
869	The city council never reaches out to the community. It's always the community reaches out to them. Rarely do you see council out in the community. No availability to the public. City functions (biker night) council is hardly available. Shouldn't the mayor of such a large event represent the city with an introduction?
870	The City is on the wrong side of everything right now and they are not listening to their constituents. Leave Jaycee Park alone. Fix our beach!
871	Increase tax breaks on Primary Residences for Senior homeowners to help counter act the runaway Biden inflation.
872	There are all these studies for growth, but never how the traffic is going to be handled. Drive Del Prado Blvd or Pine Island Rd. How do we improve that? Are we trying to be another Miami?
873	Take care of your current residents, leave Jaycee park alone, do something with the old golf course, slow development until infrastructure is ready. What was wrong with the size of Cape Coral 15 years ago?
874	The current administration and council are not concerned with the wishes of the residents. They are more concerned about commercial development. If this continues more longtime residents will be leaving due to the continual rise in taxes and lack of sufficient infrastructure for all the commercial development.
875	Seems to be retail commercial activities in process in NW and NE part of city which is good to see. But along with that is needed more eateries, retail big boxes ie. Costco for example, Movie and entertainment facilities, for future apartment rooftops, seems to be in process but again no ownership availability for multi-residential maintenance free living with amenities for all ages especially seniors. The need would keep people in Cape Coral and not Ft Myers or surrounding areas. Needless to say just came back from Europe for a month and there road systems are so far more superior then ours. Really need the State and County to step it up on our arterial and collector roadways.
876	Fix the roads
877	Our current government is terrible. The street signs that are still down one year later is unacceptable. This should take more priority than landscaping Chiquita Blvd south or putting up school zone flashers on Chiquita when you don't see any school busses or students walking anywhere near the signs. Total waste of tax payer money.
878	The city council does NOT listen to its citizens. We have unfinished projects. Frivolous use of our tax dollars. Ridiculous cost in utilities. And a corrupt city council that seeks to destroy our parks that we ALL have spoken out about. We don't want not for truck pavilions which in turn rob the food truck of 10k a month and displaces animals living in the ecosystem. We will go further if this continues.

879	PEOPLE WHO HAVE NOT LIVED HERE MORE THAN 10 YEARS SHOULD NOT BE IN ANY POLITICAL OR COMMUNITY GOVERNMENT!!! They have NO IDEA how at what has happened here and should not be dictating what is going to be done. There should be a minimum of living here a MINIMUM of 10 years of being a FULL TIME RESIDENT. NO SNOWBIRDS, NO NEW RESIDENTS. We don't care how you did it in NY, NJ, OH, IL, OH, IN, PA, ETC. THIS IS SWFL NOT NORTH STATES!!
880	Increase Patrol of code compliance, there's a lot of trash in my neighbor's yards and boat parking but if we bring our RV home for 3 days to get rid for a trip we get a call. It's not fair
881	Jaycee Park should be left alone NO alcohol should be served in the park. It's a residential area, they already speed up and down Beach Pkwy and to add alcohol to the mix is just looking for trouble.
882	Please don't commercialize Jaycee Park. Please and thank you
883	Roads are very important, especially to us working class. The congestion is pretty horrible
884	Investment in education by paying teachers more and provide affordable housing for teachers. Bring more career jobs to Cape Coral to attract younger generations.
885	The City needs to listen to the residents and not bulldoze they're projects through. We can't have all this development when utilities and roads can't keep up. Stop catering to developers and pay attention to what quality of life you are creating for the residents of this City. We don't want an overcrowded traffic clogged place to live and that is what you're creating right now without any thought or planning to what the long term effect will be.
886	Cape Coral needs to care more about its community and less about tourism.
887	There doesn't seem to be a clear vision of where commercial space and residential space should be headed. We have a very large radius yet only shopping along Cape Coral Pkwy, Del Prado or Pine Island Rd. I feel a few more neighborhood shopping centers and medical/ dental clinics would keep the smaller community feel and cut back on some of the traffic. Also there is no beach!!!
888	Traffic mitigation
889	Not a business-friendly city at all.
890	This city was doomed from the start with very little zoning for commercial. As a result, it seems as though the city council and government are trying to make up for lost time by putting business and development where it simply shouldn't be. Stop trying to lure more business here until the infrastructure is put in place to support them. Stop selling our souls for more business until we have better roads, utilities, and affordable housing.
891	The city leaders we have now are ineffective and are serving for the own self interests. We need real change. It seems they never listen to the will of the people! Half of the time people can't speak out.
892	People call it Cape Coma. Minimal nightlife or events for young to middle aged people. No shopping/boutique stores. Open Cape beach back up! Manage and control traffic. Amount of daily accidents and time it takes to drive is a huge deterrent. Street beautification especially mid Cape and clean the place up. Always trash on roadways quite sad. Lots of potential here! Most restaurants on waterways accessible by boat too!
893	The city desperately needs to bury the electrical grid. Every hurricane we lose power for weeks. Its ridiculous. If you can assess people for water, you can do the same to bury the electrical infrastructure.
894	Been waiting ten years for that Bimini Basin project Get it done!!

895	There are not enough high paying jobs forcing residents to commute out of the Cape and the commute is terrible. There is too much development in the two areas- one being pine island the other on cape parkway which is causing horrible traffic. People cannot even think about Del Prado. They are using prime land for duplexes, car washes, dollar stores and storage units. We need better shopping and better jobs and more thought to traffic.
896	Cape Coral city council needs to listen to the public as it relates to Jaycee park. Do not remove the pine trees along the river! That shade is to valuable
897	North/south and east/West streets are an issue and current ones are so busy they need more turn lanes in the median.
898	The city needs to maintain and repair after Ian, not tear up existing green spaces. The city is taking on too many expensive projects all at once. Save Jaycee Park - keep is green and peaceful.
899	Stop with the overreach of the City Council not listening to the citizens. They, clearly, are not listening to the citizens and what is in the best interest is their constituents. If they after but interested in doing the job they were elected to do, they need to stop taking money under the table and resign.
900	The City of Cape Coral should think more of his residents than trying to spent Cape Coral Tax payer money on tourist which we get anyway. People lost their homes with Ian and can't find affordable rental homes because every second house is a vacation home. We need parks to be parks to relax and sport venues for kids (YMCA!) such a big city but we have to drive to the municipal of Ft Myers?
901	Please consider place barriers for noise reduction such as trees, walls etc. to help control the noise. especially coming from Pine Island Road, one of our streets is a cut thru with at least 6 bus stops and people fly thru the neighborhood. reduce speed limits on these big roads if its 2-3 lanes the speed limit should not be 50, coming out onto pine island road is very dangerous.
902	I have concerns regarding the Jaycee Park project. We NEED a local park that is peaceful and quiet, accessible to families. The roads in and out are not capable of handling a significant increase in traffic, nor is there enough room to expand the roads accordingly.
903	Need to get speeding under control and the running of red stop lights. Also need more retail shopping here. Another Walmart especially
904	Please stop allowing so many duplex's
905	New York's Central Park was created in the 1800's because people need to be able to get outside away from concrete city to enjoy a green space of shade trees and fields. In Cape Coral, that means lots of shade trees! The heat makes it impossible to walk a dog or ride a bike or exercise without shade. JayCee Park is in jeopardy as some developers want to change it into a concrete boardwalk on the river with commercial enterprises and with removing the existing shade trees. Big mistake. Give us a beach and let Cape Coral become a destination city!
906	Jaycee Park could be a great water from destination. Forget the food trucks get a tiki similar to the boathouse at the Yacht Club. Boat slips and boadwalk along river. More shade. And yes alcohol. I don't understand what the 3 council persons have against alcohol. I would like to see water taxi like Lauderdale has going from N Fort Myers to downtown Fort Myers JC park down Cape where the food trucks are going the Boathouse Tarpon Point Cape Harbor and Fort Myers Beach.
907	We need to keep our green space and our parks that are here safe from change
908	Everything needs a touch up. Especially all the of the landscape down main roads. It looks dirty.
909	You need more high paying business that are developed in nw/ne

910	Please put a light on Skyline and Pine Island Rd. And add a big parking garage in downtown Cape.
911	The city is allowing development of shabby housing projects along our main roads. Smaller multifamily houses with junk cars, trailers and work vehicles parked everywhere. Traffic jams continue to be a problem. We seem to have uncontrolled growth without infrastructure improvements. Our canals still suffer with junk from Ian. Signs on the waterways and roadways are still not all back.
912	Cape Coral traffic is horrendous in season and any development needs to take this into account. Any development that brings in more traffic will have a negative impact on quality of life for residents and tourists.
913	Priority should be medical. Hospitals including need for medical professionals. Emergency rooms packed with extremely long wait times. Office visits booked months out for any private practice. Horrible conditions - dr.'s come but don't stay.
914	Permitting needs to be fixed. It's so hard to get a permit in the city of Cape Coral. That is your biggest problem.
915	We need at least one more major hospital. Cape Coral Hospital is too small and the ER wait times are TERRIBLE. Another hospital would also attract more doctors - now we have to go to Ft Myers for most doctor appointments.
916	We desperately need a Costco in the Cape Coral area. We are growing so fast and have many choices on stores and restaurants. There is a Sam's club but no Costco and I have to like so many drive to Fort Myers. If you put one in an area that could also get business from Punta Gorda, it would be fantastic
917	I think the powers that be need to be more in touch with the people and their needs rather than their pocket books. They need to listen to their people and have open minds when doing so. They work for us and not we work for them!
918	Cape Coral government has its own priorities, not those of the citizens. Projects should be listed with associated costs and citizens permitted to vote yea or nea.
919	Parking downtown is a nightmare all the time now.
920	In number 8, I feel that the CRA is more of a hindrance then a help. Most projects die and the money was wasted. Pine Island Rd. Is developing faster and has none! We need the tax money to save the residents a few bucks!
921	Love living here for last 17 years but I am very worried about traffic and how much it will affect the standard of living here!! It's NO fun trying to go over bridges between 6 and 10am now let alone the nightmare it is in season!! Please figure out what we can do to alleviate, or road rage will continue to worsen!!
922	The streets are in bad condition. We need more business places like shopping, malls, theaters, and street lights. Cape Coral is very dark at night time. Something that we truly need is an upgrade of our technology systems. The government websites are slow and old. We need the latest technology to get better customer service. Affordable Housing is very important. We need people's investment in our City.
923	The biggest downfall for Cape Coral when trying to entice businesses to either expand or build, is all the red tape involved and the seeming inability of the city to work with new businesses.
924	Would love to see Cape Coral Parkway homes/buildings in better condition. It's a key gateway to our beautiful city and looks very rundown in places. Too few public golf courses drives the golfers to out of town courses. Music festivals/walks and other similar activities will generate revenue for us also.
925	Save Jaycee park as green space as it is.
926	We need to above all increase our green space and protect our wildlife

927	We need more of a variety of retail shopping stores besides Target, Burlington and Walmart. Shouldn't have to drive to another city to shop when we are one of the largest cities in FL! Need to stop car washes and storage units built on major roads.
928	Jaycee park should not have bar/alcohol served.. It is supposed to close at dusk. don't see it as realistic to have alcohol served in public park
929	A city as old as Cape Coral should have a better street canopy developed. Much talk about creating a walkable "South Cape" is heard but to make the are walkable and inviting more shade is required. As Oaks along Cape Coral Pky are removed (they were the wrong tree to begin with) they should have been replaced with a better native variety. Lafayette St is another example of a poor street design where NO trees were included and it is now a hot miserable place to be. Trees should also be required in surface parking areas to address the "heat island" affect of the parking lots.
930	More public waterfront access is needed. Only have The Yacht Club area now which has been closed since hurricane Ian. Also traffic congestion is a nightmare on Cape Coral Pkwy and Del Prado every morning and evening.
931	The current council does not listen to its tax payers. Are favors being given to friends who are developers? Things going on just don't look or feel right. Citizens are disgusted as council has showed disrespect to longtime residents in public, could this be the reason why no one cares to attend meetings. Council eliminated public advisory boards, message sent is not good. Closed boat ramps to Gulf access and our only public beach which is our main tourist attraction? How much did we put in renovations of Yacht club pool in the past several just to bulldoze? Why did we hire a non qualified city manager with connections to the union, to handle this growing city? The city is dirty, trash everywhere, more crime, homeless ppl, not the safe place it used to be. We are sad to see the Cape being so mismanaged and city staff and the council are not
932	Like all cities it seems the will of the people really doesn't count because the governments ignore what they want and just build build build. Sometimes that is not a good thing, where will the water come from? What about crime and peace and quiet. Cities are ruined by politicians that think more and more building is better and for the regular people it is not. All this will mean nothing to the city people that push build build build. But I have had my say. I feel bad for this city.
933	Public works doesn’t work I have a sinkhole in my yard that the city never came back fix four years old
934	LEAVE JAYCEE PARK ALONE AND STOP THE GREED THE CITY COUNCIL IS RUNING THE CITY
935	PLEASE DO NOT DESTROY OR DEVELOP ANY AREAS WITH MANGROVES OR OTHER NATURAL BARRIERS TO STORM SURGE. WITHOUT THIS PROTECTION, MY HOME WILL BE COMPLETELY UNINHABITABLE. IAN STORM SURGE WAS 8 INCHES IN OUR HOME AND WE STILL HAVE NOT BEEN PAID BY INSURANCE. IF ANOTHER SURGE HAPPENS AGAIN, WE WILL BE FORCED TO MOVE OUT AND NEVER RETURN.
936	Prioritize the yacht club beach and rebuild the pier asap. Keep beach open to the public as much as possible during rebuilding. It’s a huge draw for tourists but also a favorite for locals.
937	The city should clearly define the commercial and entertainment areas. Commercial ventures, multi-family apartments, bars, storage facilities, and car washes should not be built in long well- established residential neighborhoods.
938	A city council that listens to the citizens of the city, example - the park that the city wants to tear up just to put a band stand in, remove trees that are not native. There is vacant land near Bimini basin on CC parkway, put the band shell, splash pad there. Close to downtown and parking. That land has been vacant for years. Parking garages in high volume areas in the city.
939	My primary complaint about our city government is that it takes way too long to come to a decision. By the time they decide on a tart date for a new project, a new government has been elected and we have to start all over again. Come to a decision and proceed. Time factors matter.

940	N/a
941	We need more focus on beautifying our city. More trees and median plantings. We are starting to look like a concrete jungle.
942	We are seeing TOO much growth at one time-has a negative impact on residence. Not smart growth. Road and water impacted negatively-crime rate up-
943	Cape Coral lacks research, medical and manufacturing designation area
944	Economic development has been a goal for many years yet I see little progress outside of more retail, offices and storage units. I think this aspect is critical to our being able to avoid tax burdens on homeowners as we build out more infrastructure. The City has done a poor job of keeping their promises regarding timeline, capabilities and budget regarding GO bond. Very dismal performance in building out per plans. The City has a history of doing surveys then ignoring the citizen input and doing whatever they want. Two example: 7 islands and the height of the buildings, Tropicana Park and rowing club.
945	We've lived in the Cape for 10 years and loved it until lately. It's a disgrace the way the Mayor and City Council ignores the voters. We're looking toward moving. SAD
946	As a former city employee, pay the city employees more money. You would get better employees that would take pride in the city they live in, rather than someone making just over what someone at McDonald's makes. The Go bond was passed for parks improvements, and not much has been done, because of a lack of employees. Stop trying to outsource the labor at Coral Oaks. Add more full-time city jobs instead of contract workers that you don't have to pay insurance to.
947	If we want a reliable workforce, especially in the restaurant and hospitality industries, and healthcare, we MUST have affordable housing in the Cape, not in Fort Myers or Lehigh Acres, because people can get to their jobs if they don't have to drive long distances.
948	As mentioned above, Cape Coral has become an eyesore. Too many duplexes, storage units, dollar stores, and high-rises -- all mixed in with residential. Have lived here 23 yrs and used to love it. :(
949	Need sidewalks and street lights
950	Although I understand that Affordable housing is desired, It will impact the cost of current a communities that are 300k +
951	Cape Coral suffers from irregular traffic enforcement, code compliance and construction site cleanliness. The City needs to have all code and construction inspectors be less subjective. It is a sad state of affairs when sprinkler violations are a top priority when there is so much rampant illegal parking throughout the city. Last but not least, the city has no one that answers the phone nor will anyone respond to emails or phone messages.
952	I think we should finish fixing the parks and have covers on all play area. They should add more benches to the parks. We do not need any ampitheaters where people live and also a food truck area. Having food trucks hurts businesses that pay for a concrete building and add to our economy...
953	Better access to I 75, commuter rail to Tampa and Miami, better access to Gulf (by boat) on the west side of the city, and San Antonio Riverwalk plan for downtown (Rubicon Canal). Finally, a beach or better waterfront trails/walkways, including a pedestrian walkway included in the new Cape Coral Bridge.

954	CC continues to add more strip shopping centers even while the older centers lose their tenants and stand nearly empty. Traffic problems are added to as drivers keep switching lanes to get to the separate driveways of different centers. Aside from that, the strip shopping centers are not architecturally pleasing and require driving into and out of traffic continually to get to individual stores. Also, Edison Mall in Ft Myers is no longer considered a safe and enjoyable place to shop by many of us. With the extra land we have, the increasing population, and the heat and humidity, we are ready to have a modern, pleasant indoor shopping mall in Cape Coral.
955	Some libraries have become centers for Marxist indoctrination and child abuse. Reduce the number of libraries and promote online learning instead. You would save hundred of thousands of dollars on overhead by not having to pay nefarious staff to corrupt our community.
956	The city government is disappointing. Stop building storage facilities and plan green space. The mayor sold his house on Embers Pkwy just before a new storage facility was announced. Coincidence? Stop building and deal with what you have. No police enforcement. Not enough water to provide for all these people without borrowing from the city next door. Trash all along the streets. So sad what you've done to our city
957	Charge full impact fees, stop giving it away
958	Bus transportation on all major streets
959	Planning for impacts of future growth beyond unrestrained development.
960	Protect the wetlands, mangroves, waterways and animal habitat we are losing our natural environment.
961	I feel the Council should leave our waterfront alone and not put more bars for people to drink and boat. Stop taking trees away and council and staff should start worrying about the environment and not just about making money from citizens ecause they will go drink and eat at good truck parks. Get rid of this council who are destroying our City and the environment. So sad.
962	The city is growing so fast and the infrastructure is not there to keep up right now. Additional hospitals should be built on the west side of town. Additional healthcare in general needs to grow. Traffic congestion needs addressing. In addition, reckless driving needs to be addressed, particularly on Cape Coral parkway. Short term rental properties are becoming a problem with parties, noise, damage, etc. we need better, endorsed, control over short term rentals.
963	Less rental properties! More homeowner occupied properties. We need more public transportation Pick up locations.
964	Water mgmt and roads should be #1 priorities. CC is still considered to be business unfriendly. City mgmt will disagree, because they are blind to ALL the economic growth in the other parts of Lee city.
965	The park system. Keep the food trucks, and alcohol out of the parks promote in the established business locations. The city seems to promote revenue generating. Leave the parks as parks. I know follow the money.
966	I think we need a budget review committee to stop the council's outrageous spending of the tax payers money.
967	Develop the north Cape. Stop depleting canal water in the north Cape.
968	Traffic & Zoning concerns, large apartment complexes in the middle of neighborhoods, storage units on every street, car washes galore and to many duplex's! Our quiet city has become overrun with speeders and loud trucks and red light runners. Street signs and speed limit signs still not all repaired since Ian, though the city boasts all is corrected. People move here because they love it here and then want to change it to be like where they moved from, MIAMI we are NOT, not NY or California!!!

969	The City is always super focused on downtown but yet NE Cape is being treated like a stepchild. Even the trees on Del Prado ext have still not been repaired since Hurricane Ian. (I have asked several times when they will be repaired) Also- they keep talking about spending more money on parks when the GoBond parks have not been completed. Roads are in bad shape. Street signs & lights still not repaired. Want to raise taxes or add taxes. Stop trying to spend money on stupid food truck projects & get this town fixed up. Also- almost every other beaches in the area are open but not Cape Coral. Nothing has been done. Finish what has been started!
970	Spot zoning should not be allowed such as apartments in the middle of single family neighborhood. Harmful to property values and destroys the reason people bought where they did plus infrastructure isn't considered.
971	Listen and heed to what the residents have to say.
972	Focus on bringing industry to Cape Coral.
973	What is "downtown?" It would be nice to have some development "uptown," north of Pine Island Rd and not just Burnt Store. There are other areas in NW/NE besides Burnt Store.
974	Cape Coral is a residential community that has grown too large for the current infrastructure. Limited access highways, trees, parks, affordable housing are all needed to support the existing restaurants and tourist destinations.
975	Please pay particular attention to the Design Cost of all Projects and get Competitive Bids.
976	We need another hospital on the Cape. The population is growing by the day. If Lee Memorial won't do it, then go to another entity that will. Technical College on the Cape like the Ft Myers Technical College that offers young adults as well as older adults more opportunities to become career ready in subjects not offered at a community college. It also offers financial aid to students who can't otherwise afford it.
977	The Cape needs to find ways to attract Fortune 500 type companies to the area along with the young talent required to support their job needs. I have a 16 year who excels in STEM and is top of his class. I don't see the type of jobs in the Cape that would keep him and those like him in the area after college and we need the younger families to sustain and grow our community. Things like the Cove at 47th, Cape Coral Grove and the potential development with Gulf Gateway Resort and Marina are the right type of development with the amenities needed to draw in these young families but the Cape needs to provide the infrastructure and incentives to lure some big employers. Can Hudson Creek and the surrounding areas do this? How about the area east of Crystal Lake, 14975 TECHNOLOGY CT, could this be built into a large business park with buildings tall enough to take advantage of the same Charlotte Harbor / Gulf Access views found from the overlook at Crystal Lake but far enough away to be safe from hurricanes, help to drawing in employers? We need to get the required infrastructure up to those areas now to start the process. The Cape has a bright future but we have to look for ways to bring the young members of society here to help reach our massive potential.
978	Cape Coral needs more positive recognition. Cape Coral is so beautiful but so many people put it down. When I first bought here people were saying it was the swamp of Florida. We need to have places where people can come and visit to see the beauty of this town. 7 Islands is one place we can start with a beautiful Marina with awesome restaurants. Also it would be great to have a place where families could go like a 6 Flags Resort/Hershey Park .
979	Cape Coral cannot expect proper commercial/health/arts developments until the city's infrastructure is completed. That should have been a high priority years ago and the scheduled completion should be moved up for all areas not yet developed.
980	Cape Coral needs to be more "all-inclusive" for working families, providing opportunities to live, work, and play within the City without needing to drive to Fort Myers.

981	Cape Coral is becoming an unaffordable place to live
982	I love Cape Coral have lived here 23 years. Overdevelopment without improving roads, has led to a perfect storm of accidents, and injuries, water shortages. Careless Development of residential neighborhoods, by approving commercial businesses. Considering changing beautiful parks into possible commercial events.
983	Cape Coral mayor and city council should listen to their constituents and not forge ahead on their pet projects.
984	We need to bring in higher paying jobs through business and technology hub development as well as commercial development which will also support tourism. Waterfront and recreational development will attract new residents and build tourism as well. The cape has an exciting future if development is planned appropriately
985	Please rebuild the Yacht club the way it was. Cape Coral needs leaders that do NOT make decisions based on self interest. Elected officials need to curb these hedge funds from buying up neighborhood houses and turning them into vacation rentals. That is UNAFFORDABLE housing for people that actually live here.
986	City Council does not value citizen input. The Council/City is not at all transparent. Change is needed in leadership.
987	Cape Coral needs a City Council that listens to the citizens. Currently they ignore any citizen generated concerns about development. They are solely interested in making money for themselves and are under control of developers and the money they use to purchase influence to change zoning. One of Council's most damaging decisions involves changing parks and protected wetlands zoning so developers can create huge developments that are harmful to the environment, wildlife and to residents. Soon there will be no natural areas left to enjoy. All that will remain after developers get their way (and money) is tacky, cheap tourist attractions that will quickly become dated.
988	NO MORE APARTMENTS OR STORAGE FACILITIES!! Also, the new food truck park is a major concern for a full time resident who commutes. CC Pkwy bridge can not handle the traffic now, let alone when the food truck park opens. What step are being made for traffic patterns? Also, more traffic signs need to be placed in that area for when straight lanes end and move to turning lanes. And not signs on the side of the road, unfortunately the general public is stupid and you'll need to place signs above the roads.
989	Cape has so much to offer and we are looking forward to much more. Getting our beach back open, increase parking at the beach and downtown areas is crucial for our tourism. Our streets especially del Prado and Cape Coral parkway are lacking serious curb appeal. Dead palm from Ian and dirt are in many of the islands. Most importantly having all our street signs back up would be nice. So many are still down or twisted. First example country club & veterans. Big intersection no signs headed east on veterans.
990	The City needs everything that Fort Myers has so our residents don't need to cross the bridge. Employment opportunities, An indoor shopping mall, upscale restaurants, entertainment.
991	We need to continue to promote business, and tourism as well as making sure we are a great place to live. Cape Coral has got to update/upgrade its permitting department to help with the development, construction and reconstruction in order to keep moving forward. we also need to have nice family areas in the city: with the loss of the yacht club area we should have a plan to add a public pool to an existing park, or add a new park with a public pool, aquatic center, band stand, maybe food truck area that could then host public events
992	CAPE Coral is a unique, peaceful, spiritual place. That is what draws people here. We DO NOT want it turned into the NE concrete jungle States. Think ZEN.. think Sedona. Thats what Cape Coral is. Stop raping our beautiful City. People are already moving here based on the natural beauty of the City. We need a larger hospital facility to keep up with population. Build it in the NE/ NW where their is open land. We need hurricane SHELTERS as per FL STATUTE. We are not complying with evacuation routes and shelters as you increase density with the hideous tall apartment buildings everywhere.

993	Stop wasting money on beautification projects.
994	Based on our current council, we need people who understand the needs of our citizens, not the dictatorial, bullying mayor we have who is bringing in people from his home state to rubberstamp his spendaholic agenda
995	We need to uphold anything left of our history that made this great city that drew people here in the 1st place. Everything right now is focused on restaurants and bars. Young children need more focusing on being our future here. Some kind of recreational center for the children YMCA for everyone.
996	Focus more business development on NE and NW Cape rather than downtown Cape or south Cape.
997	Please don't put up any more of those huge apartment housing complexes. And no more storage facilities.
998	Concerned about lack of environmental awareness and preservation.
999	City is HORRIBLE with contracts! Debris management after Irma, waste management and accountability. Signs are still down from Ian and buildings are eyesores yet the city goes after food trucks. They need to prioritize goals. It's ridiculous we still have LCEC. No accountability.
1000	I was born at Lee Memorial so I'm technically a "native" however I've been privileged to travel around and live outside the local area. One of the cities I lived in for almost a decade is Santa Clarita, CA. The city is located in greater LA County but feels nothing like LA which is a GREAT thing! City leaders should take a minute to look at other similar cities as Cape Coral is prime for major development but nobody wants it to become Tampa, Miami, or otherwise… checkout Santa Clarita and what they have done with their parks, trails, and building infrastructure to attract business……
1001	Please don't destroy our beautiful parks, on the contrary, include them on development plans to make them better.
1002	Summers here are unbearably hot!! A north Cape public pool, YMCA and lots of shade for our parks. More sidewalks for kids! Increase in public safety! Another hospital
1003	Would like to see the development of the North spreader direct access to the gulf.
1004	It appears the city government does surveys so they can go ahead with development and say it's what the public wants due to surveys.
1005	Cape Coral needs to pull in more corporate satellite campuses and or tech hubs. Tampa just opened Pfizer and others, Sarasota has a Morgan Stanley and others. The job opportunities currently in Cape Coral are not going to draw in young and upcoming professionals with families. There is an opportunity in the northwest to continue with smart development and need to find a way to include commercial opportunities. We have plenty to draw in retirees but lack the draw for young professionals.
1006	Cape Coral is one of the worst run places I have ever lived. There is too much greed, businesses are shady, lack of foresight, and bad planning. It's so bad that while I'll live in the Cape, I don't and won't do business in the Cape at this time.
1007	Cape Coral council is not listening to the residents. They are approving and promoting developments they don't fit in the neighborhood. Concerned for future property values. Also is there is not more true commercial development vs strip malls there are not going to jobs for future. Our roadways are insufficient to continue any downtown development. I have been a resident of Cape Coral for 40 years and have never been more disappointed in it than now.
1008	Update EDO Projects map with existing developments & commercial projects to share investors the potential out city presents

1009	I feel the city council is disconnected from the voters and their needs. Preserving quality of life and property values should be a higher priority
1010	People flock to Florida for the sunshine and beaches. We need a decent beach asap. The yacht club area according to the pre-Ian plan would help full and part-time residents to stay local and pay local. It's an easy observation.
1011	More businesses, several large shopping centers or malls. More cultural events, bookstores... More employment.
1012	Need more enforcement of traffic laws especially those who run red lights. On a daily basis accidents are caused or nearly caused by bad drivers.
1013	Stop the building of Apartment Complexes and Storage Units. Plus how did that monstrosity on Cape Coral Pkwy get approved? It's right on the sidewalk and the side street is closed down. Concentrate on the Red Light Runners.
1014	Increase walkability and incorporate water management into parks and greenspaces. Cape Coral is going in the right direction in its promotion of a diverse and safe community. South Cape Entertainment has been great.
1015	Cape Coral is a very unique city with all of our canals. But I've heard many times that it is Lehigh Acres with water because of how ugly it is. It is very embarrassing to have no landscaping in main areas of the city (veterans, pine island, etc)... the standards of the first impression are very low. Let's raise the value of our city by how it looks.
1016	No more apartment complexes that sit empty. Take care of our green space and build natural barriers for future flooding. Underground electricity for housing, Cape was out of power for weeks during Ian. Improve what we have before putting more stress on our currently weak infrastructure. Beautify the medians throughout the streets, clean up the canals that are still a mess from the storm. We don't need a college here that is ridiculous. We need more money for our schools and horrific bus system. Implement higher tax for non primary homeowners and AirBNB/rentals. Red light cameras will create huge revenue inflows and hopefully make our roads a little safer. Speed cameras too. Why do we not have these here? Do we not want the revenue? Give that revenue back to projects for the actual homeowners that live here, work here and kids go to school here. We have enough affordable housing. There are empty apartments and duplex rentals all over Cape and more being built. The older units are now looking run down as new are being built and it's an eye sore. So stop with the affordable housing. There is plenty and with 6 new apartment projects I cannot even fathom we will ever, ever have a need again. The renters and snowbirds make it almost unbearable to get to and from work during season. A 30 minute drive becomes and hour to an hour and a half. While tourism brings revenue we have to ask at what cost? We can't get rid of the snowbirds and short term renters but we should do something to regulate it or increase the revenue and tax they are already paying. That way it doesn't drive out our full time residents.
1017	Permitting is weak here. Increase support. Increase commercial growth and promote work with vocational training. Increase police presence, there's entirely too many accidents. Increase parking with parking structures.
1018	I think our council members should resign they don't know how to run a big city.
1019	Cape Coral needs a sports complex with a competition pool. Cultural events like Naples orchestra and art gallery. A larger downtown area filled with shops and restaurants. In the North parts of the Cape, they should bring in large businesses for more jobs for locals. An amphitheater should be in the north part of the cape.
1020	Stop reducing our green spaces. For all the talk about climate change, it seems to me all you politicians want to cut down all the trees that exist. Would love to know who's benefiting from all this commercialization of Cape Coral certainly not the people that live here
1021	We need career jobs, not dollar general and storage.
1022	Please stop the influx of car washes, dollar stores, storage, auto parts stores. It's laughable and sad.

1023	Do not destroy Jaycee Park. Put in sidewalks, pedestrian pathways and other ways to get around CC other than a vehicle.
1024	This City has been one of the fastest growing cities in the nation for decades. Why? Our waterways. Including water quality and canal maintenance as an economic priority is important. The City seems to be divided into two demographics: retired class and blue collar working class. Attracting and retaining the working professional class is important.
1025	We chose Cape Coral to retire to for its smaller town feel & appeal. Since we've been here it seems our city planners are pushing rapid, massive growth. Having second thoughts….
1026	You can't keep expanding with have the infrastructure to support the growth duh
1027	Putting more enthusiasm into the Yacht Club project. This is slowly but surely becoming a joke.
1028	Utilities and taxes are going to be your undoing as families are no longer able to afford living here. My husband and I have lived here 24 years and of course we expected the city to grow, but the high rise multifamily housing and change of zoning laws is not the answer…ultimately, it is all about the money but how about some consideration for the residents
1029	Jaycee park needs an upgrade. New pavilions, picnic tables. No liquor sales in the park. Keep hours as they are. Heavy residential area.
1030	Please save JC park. We don't need to destroy those trees.
1031	Quit spending taxpayers money on things they don't get to vote on
1032	WE NEED TO FOCUS ON A LOT OF THE INFRASTRUCTURE AND TRANSPORTATION ISSUES. THIS WILL MAKE THE CITY MORE TRAVERSE FRIENDLY.
1033	Hurry up and complete the water and sewer throughout the city, all at the same time. Stop dragging it out piece by piece. Then the commercial zoned areas can be built (mainly in the north end).
1034	Growth is fantastic, but traffic control needs to be addressed. Additionally, more eyes on the road to prevent accidents from aggressive drivers, texting, DUI, speeding on residential roads, etc
1035	City council is aimed at spending $12,000,000 taxpayer dollars to commercialize a beautiful river front nature park and it is wrong!
1036	We need less high density development and more care given to how we are using our resources and developling a network of utilities that actually works for an increased population. More building will bring more flooding unless we do something soon.
1037	Way, way, way too many storage facilities and apartments. More open/green space left mostly natural to show respect for natural resources. Much better medical treatment, especially senior care specialists and more and better healthcare overall. Takes 6 months to see any doctor and that is not acceptable. Why are we not attracting more white collar/high tech/professional companies and organizations. We're full of restaurants and small businesses but are not known for anything in the professional work arena.
1038	Traffic congestion is becoming a huge concern. This should always be something the city is working to improve. The city needs to continue to invest in student education particularly with investments in the Charter Schools. Continued improvements to city recreation like Sunsplash and city parks and recs are excellent and need to continue.
1039	No more dollar stores, luxury apts, car washes, or storage units!!

1040	Stop allowing carwashes, storage places, auto parts stores, vaping places on every corner It makes the city look trashy
1041	The City needs to realize not everyone living here is rich. Stop wasting money and spend tax dollars wisely
1042	There is an immense need for road way development to improve the already overloaded congestion. Stop allowing housing and businesses construction, until the infrastructure can catch up. And for goodness sake start controlling business signage. We look cheap. Collier county looks so much classier. Less is more.
1043	Consider private homeowners when considering building apartments. Very dissatisfied to see where some are located.
1044	The city needs to be more concerned about maintaining what is already established. The city needs to improve their code department. People tell me it is a nightmare. The city needs to be more prudent in what they allow to be built in the city: not what brings dollars to the city coffees but what benefits the residents. Most important listen to the residents who have been here a long time.
1045	Cape Coral needs to become a more efficient government entity. Start listening to your constituents.
1046	Leave Beach Parkway park as is. Add more canopy trees but leave what's there until the new trees are fully grown. Need more shade. Leave it as a natural park setting for families to enjoy. Creat another place for your commercialized park.
1047	Leave Jaycee Park alone, clean up our water.
1048	Infrastructure needs a lot of work. Congestion is everywhere. Keep the parks as they are but build out what land we have as a green area - splash pads, amphitheater, walking trails, etc. Need an additional hospital here. A park with multiple pools (lagoon style) for families to go to. Sunsplash is ok, but not suitable for families who just want to lounge around outside and not have the chaos of a water park.
1049	I would, but you're going to do your pet projects, anyway.
1050	Cannot see the City going all electric vehicles. The cost outweighs the use
1051	Build road access before allowing any more development. Save more green spaces and natural habitat for wildlife.
1052	The infrastructure must support our growth
1053	To help development, more lighting on streets. People feel safer when there is more lighting
1054	Downtown Cape is well developed , look elsewhere.There are many underdeveloped areas that Commerce can invest in to attract renters, homeowners and tourists. Schools and healthcare follow close behind. Transportation routes added for outlining areas. Our waterways are a large access, please manager storm, sewer and drinking water mindfully.
1055	Cape Coral needs to attract more permanent residents by offering better jobs with better pay. The land developers are so concerned about making a profit, they are destroying the landscaping and beauty of Cape Coral, which is why many people moved here. Not to mention, we don't have the infrastructure for all these new homes (restaurants, roads etc) if this doesn't change, we are going to become as congested as many major cities.
1056	If the Council is going to solicit community input, then listen. If they're doing it just for window dressing, then don't waste the volunteers time.
1057	None
1058	The current council is highly destructive to a positive environment. They are not at all representative of the population here.

1059	We moved here from Hollywood Beach and are very disappointed.
1060	No additional comment.
1061	Don't know why I even bothered. Nothing about the yacht club, the beach, the fishing pier. They should be a priority. Nothing about a infrastructure that is failing miserably. Leave Jaycee Park alone. No for food truck parks please.
1062	The infrastructure does not support the number of people who live here especially during season. Traffic is unbearable. We a need to get people out to vote because this city council and mayor need to be voted out. We need a council and mayor listen to the tax payers of CC.
1063	Stop development of natural areas
1064	We need to slow down on new home construction. Habitats for wildlife are rapidly disappearing. It needs to be more balanced. Right now it seems like it's full on building rather than stopping to plan it out smartly. I'm all for new businesses coming into the area but we don't need anymore storage facilities or Dollar General stores. I don't feel that the current mayor and city council care about listening to the citizens, though this survey is a good first step. Thank you.
1065	No more car washes or storage units, build up roadways and beautify landscaping, etc.
1066	Please work with FDOT to make getting into Fort Myers easier via our bridges. The traffic issues have grown worse with every passing year and the main issue is the Summerlin light just across the Midpoint. It stops traffic from moving and backs up across the bridge. There needs to be a flyover or bypass for that light, especially now that they are building condos where Broadway Palm is and adding even more traffic to the area. The Pine Island Road corridor is being developed so heavily that the roadways can't keep up with the volume. The number of homes going up everywhere is putting a strain on all of our resources - water, floodplains, etc.
1067	Cape Coral needs to develop more Commercial areas to increase the tax base.
1068	Please stop the over-development. The current infrastructure cannot support more people and tourism.
1069	Cape is being overrun with rental homes. I would like to see stricter regulation of those properties for the safety, peace and enjoyment of the permanent residents. Example: The house next door to me is used as a rental. The roof was in disrepair in the years leading up to Ian (multiple patches were visible and the age estimated to be around 20 years old). The roof immediately peeled off in the winds of Ian. Homes used to produce income should be kept to a minimum standard that does not put surrounding property in jeopardy. Annual inspections and certification for occupancy?
1070	Cape Coral has a noise pollution problem that gets worse every year. Most of it has to do with vehicles with extra loud exhaust and subwoofers. These rules need to be enforced for our city will become miserable
1071	Need to start doing your job traffic offenders running red lights, speeding, obsessive weaving in and out of traffic running stop signs
1072	Loved living in the Cape until City decided to destroy Jaycee Park, ignore parks planned (Parks GO bonds) & remove Yacht Club as family-friendly beach area.
1073	CC is owned by developers who are allowed to build at will to make money and screw the population. Affordable "duplexes" will turn CC into a slum. Canals and freshwater lakes are a draw yet neglected. downtown is little more than a strip mall and pub crawl. look at Punta Gorda, Estero, Bonita etc. strong architecture and access. CC government terrible.

1074	This city needs more big box retailers. We need another major hospital so there are choices instead of the monopoly that we have in this county. We also desperately need the I75 connectivity in North Cape from Del Prado extension. This will allow more commercial businesses to look at this city.
1075	Better bulk pick up. Rather then just having people put it out, make a schedule (ex: 3rd Wednesday of the month etc). If people leave things out more than a few days, they should be fined. No nicer neighborhoods and cities have trash and junk by their roads. It's horrible to be looking at toilets for weeks on end or people's furniture or entire houses after they moved out. We also need more splash pads at our parks for our kids. We are a family centered city in hot Florida. We have no beach and currently no community pool. Put splash pads in at the parks. Maintain medians better. Only certain medians get attention. The others look run down. Again, you want a "beautiful" city that attacks tourists but the mediums and landscaping in the majority of the city is overgrown, filled with trash or just ugly. Go to Naples, Bonita, Punta Gorda....compare the trash on the streets and medians and it's completely different. Sometimes I am embarrassed driving with friends from out of town because of the unkept streets. The city needs to do better and enforcing people to not leave garbage out and cleaning the streets/medians.
1076	Traffic was a mess. Need more control, too many accidents. Need better public transportation. The changes coming to Jaycee Park are really sad. Where can you go on the water with shade and peace now? The condition of homes and the trash is not home it used to be. There is a beautiful home that cannot get a buyer because of the condition and trash if the house across the street. There are 10 cars parked on the grass. Homes are not parking lots.
1077	I think downtown on the terrace and those surrounding communities should be updated and modernized the whole city of Cape Coral is dated. We have plenty of bars and restaurants. But that's about it. I am very strongly against touching Jaycee park it is beautiful the way it is. There are other developments going on that are more inviting like Bimini basin and that food truck park. That's plenty for now. Not to mention yacht club and Cape Coral Beach. The town still hasn't even recovered from Ian. Street lights and street signs are still backwards and missing, landscaping is still backed up. Etc.. Last town hall meeting I was at the Mayor was too tired to even sit up in his chair, he leaned back in it the whole meeting. Didn't really seem interested in what we had to say. It. Let's get the projects done by priority and then see what money is leftover. 1st. Get back to normal after Ian. Repair Cape Coral beach, yacht club, pier. 2nd. While that's going on get street lights and signs updated and modernized, landscaping, storm drains cleared etc..maybe add some sidewalks and modernize the roads we currently have. 3rd. Adding the venue at Bimini basin and the food truck park. Last leaving natural barriers alone. Including Jaycee park. Sincerely Stacy Clayton
1078	Take more of the community input seriously. The current government 'acts' like they care but then does whatever they want anyways. The need to spend our tax dollars wisely is huge.
1079	Q.2 is messed up. if you are ranking, you have multiple choices or numbers. it's fixed on utilities . this survey only gives "your" ideas, we need to stop building, fix infrastructure. stop wasting money on the medians, you should have gone to swales with drains, rocks, and native plants, no water needed, and very low maintenance!!! too much wasted money on frivolous landscaping!
1080	We need more ambition when it concerns attracting businesses and schools. The other side of the river gets FGCU, FSW, pop stroke, top golf, fresh market, whole foods, Trader Joes, Costco, and Cape Coral gets dollar stores and storage facilities. I hope we keep Sun Splash because nothing else in Lee county competes with it. I hope we can build a public indoor pool or attract other quality businesses like I mentioned above. We also need multimodal transportation options as the city grows.
1081	More cars are on the roads every year so our roads and traffic signals need to be able to support this.

1082	I feel Cape Coral is missing the mark with waterfront opportunities. We're a beautiful peninsula that should have a thriving waterfront community with shopping bars and restaurants. People come here for the water views.
1083	I would like to see more opportunities to support children and families - whether that's affordable housing, educational facilities, vocational training opportunities, or facilities for children (ex: there are a plethora of "kids gyms/play areas" in Ft. Myers but none in CC). An increased focus on safe, reliable public transportation should also be paramount as our region continues it's rapid expansion.
1084	The traffic needs to be addressed and the north Cape could use more restaurants.
1085	The amount of apartments & storage facilities that have and are being constructed is disgusting. The city lacks the proper infrastructure for the amount of traffic of the road. Pine Island & Veterans both need to be widened especially considering evacuation routes. The school pickup lines also need to be addressed, cars literally stop and block traffic with one lane.
1086	Too many car accidents. I see people running red lights every day. Control taxes and city spending. Streetscape beautification is important.
1087	Let's keep our city residential and let FT. Myers deal with all the the big arenas, colleges, airport, big commercial businesses and large attractions. Cape residents can drive to Ft Myers for those congested amenities. We don't need them here. Clean up and improve downtown Cape. Provide more parking. We don't need big business here other than health care & schools. Concentrate on getting the yacht club beach and park finished and similar to how it was. Please keep Jayce park the beautiful, historical and small quaint park it is. The park is too small and the location does not support all the proposed projects. Don't ruin Jaycee Park by making it a crowed, noisy tourist attraction!!!! Fix the roads and street signs and red lights. Clean up the canals. Maintain nice trees and shrubs. Provide more golf courses, pickle ball , tennis and sports for our residents to I enjoy.
1088	I am very concerned about the traffic flow in NE and NW Cape Coral. The four-way stops are not appropriate at many of the intersections. Sometimes up to 60 vehicles are waiting at a stop sign. This leads to people make risky decisions that result in accidents. We also need to lower the speed limit on the Del Prado extension and finish up the work on the traffic signals at De Navarra and Averil ASAP. In addition, the light at Pine Island and Del Prado is also a nightmare. It can take up to 20 minutes to make a left-hand turn and that is why so many people run the red light and why so many accidents occur. We should not expand anything (business, housing, etc) until our roads are able to handle the increase in traffic. Just last week we had a sinkhole on Chiquita Blvd. Please fix the traffic situation before anything else. I have lived in Cape Coral for 30 years and the traffic is by far the worst I have ever experienced.
1089	Need to beautify the north areas. Trees, landscape etc.. Very plain now and it's an area that can attract a lot more residents and business
1090	Fix the infrastructure. Stop putting multifamily housing developments here and start catering to families that pay property taxes.
1091	We need more green space to accommodate the increase in population. The old golf course on Palm Tree should be a park. We also need to have improvements (multimodal or roadways) to our transportation system. Sometimes people don't go out because they don't want to fight the traffic. We also need improvements to our infrastructure to keep roadways from flooding

1092	Cape Coral must provide incentives to companies committed to providing careers, not just jobs. The city should establish a higher education system that inspires our future leaders in the private and public sectors. City leadership must expand investment in areas of the city other than Downtown Cape. Too much time and effort are focused on a small section of the city.
1093	Stop building apartment buildings. Stop encroaching into single family developments with multi-f amily units. Improve the roads and turning lanes, now that the population has increased so much. Stop allowing weekly rentals.
1094	I grew up visiting SE Cape Coral since 1985, my grandparents retired down here. Loved visiting, people were always so friendly. 2020 I moved down here to start fresh from a divorce. So miss the feeling I used to have as a kid down here. Now I am well aware I am an adult now, but never have I felt yet that I am accepted member of this community.
1095	We need to keep up with city maintenance of water, parks, utilities, & roads. Do we have enough water for our residents as we expand? We still have signs that haven't be fixed since the hurricane. Time to take a breathe & take care of all we have. We have enough apartments now. We expanded too quickly…
1096	The lack of health care not enough doctors For what I have seen the past couple of years the city wants to destroy every green space there is The city has changed since I have moved here and not for the better City leaders do not care about the residents at all and it's our fault for voting them in
1097	It appears the growth is exceeding what is being done here.
1098	Leave Jaycee Park as it is! Repair the still damaged/missing traffic signals & signs
1099	leave Jaycee Park as it is. do not allow development at Redfish Point
1100	Slow the residential growth-improve city infrastructure to handle the additional people
1101	People move here for the vibe. People visit for the same reason. We are about 1/2 to FMB and Sanibel. This is a great location. Keep the small town vibe. Do not make it a metro area.
1102	The roads are horrible
1103	Stop allowing the building of new strip malls when there are so many sitting empty. Fix all of the crappy roads in the city and install more sidewalks. Stop trying to make the city like Miami it's becoming over commercialized.
1104	Lower taxes. The City doesn't do a good job managing its finances.
1105	Address rapidly growing traffic problems as highest priority! Longer and fewer left turn lanes on Chiquita Blvd S. Build Flyover from Chiquita Blvd S onto CC Pkwy going east - this or a similar solution will be desperately needed to address the rapid population growth due to the large condo developments in SW Cape Coral. Urgently eliminate parking lanes and right turn only lanes on eastbound CC Pkwy between Coronado and Del Prado and the left turn only lane onto Coronado - these measures are desperately needed to ease morning rush hour.
1106	Taxes are high, in return the city should be beautified and city codes should be enforced. The city is getting worse with junk sitting around and rundown buildings.
1107	We need a shopping district like Coconut Point Mall in Bonita Springs.
1108	It seems Development has been approved without organization and forethought of infrastructure for roads to be considered in advance of the development. Real estate Developers seem to have too much of a free reign. It would be good if we Cape Coral can keep the small-town feel.

1109	We have no big malls No decent beach No really good resort
1110	SAVE JAYCEE PARK.
1111	You all are absolutely RUINING our city. I am 40 years old and have lived here since 1990. Approving the apartments, rezoning land, ruining Jaycee park?? Ridiculous. I will be voting you all out ASAP. Quit making this a concrete jungle. I am so upset every time I drive past 47th terrace seeing that 4 story apartment practically on the road. Apartments used to never even be allowed in Cape Coral years ago!
1112	Listen to the permanent residents of Cape Coral. You may lose them otherwise.
1113	I think the government of Cape Coral has lost site of its role to the citizens of Cape Coral. When we moved here the city was the cleanest city we have ever lived in and traveled through, but not anymore. The code enforcement seems to be non existent. We have more multi-family projects going up than we have people that can occupy them, nor can afford them. The city continues to allow commercial development for service industry jobs and retail jobs being built on sites that should be used to bring in larger industrial jobs with higher paying jobs. There has been talk since we moved here about the Bimini Basin project and the project out Burnt Store way with no movement to speak of. Personally I'm happy about that. I am saddened about what the city did to the food truck vendors. That was a move to enable a real estate investor friend to get a project done and have a "select" few vendors. Shameful. Hard working construction workers from all over Cape Coral can't take a quick lunch in SE Cape. The food truck vendors and the hard working citizens of Cape Coral were hurt by the city government and wealthy people's greed. Again, in my opinion. I have loved this city and want to defend her, but it is getting harder as time goes by. Thank you for the opportunity to hear our voices.
1114	Currently the city lacks roadways to accommodate the growth of the city. Intersections are clogged and traffic management is atrocious. Traffic lights are mistimed and erratic. Development on what will obviously be future major roadways is ill advised. Electric service needs addressing. Weather related outages are too numerous and acceptance of solar option for individual housing is not encouraged by LCEC, in fact made difficult by that service provider. Vacant and rental properties are not well regulated and vacant properties reduce housing values. Cite water utility billing is slow and no acceptance of electronic payments. Finally, development drive the economy of the city, however if the road infrastructure is inadequate it increase accidents and travel time. The city seriously needs to improve the roads and intersections throughout the entire city.
1115	Wider streets Sidewalks Better street lighting
1116	A lot of vacant and rundown properties, especially in the downtown area. Need that area to look better. Too much money being spent on parks and making them too busy. Keep some simple and alcohol does not need to be served at these facilities. Too much alcohol everywhere here.
1117	I have lived in this city since 1991. My daughter was born at Cape Hospital as well as my grandson. This isn't the safe big city with the small town feel anymore. I stopped driving to Fort Myers because of traffic, it is horrible here now.
1118	Stop ignoring the people who actually make money for the city, the worker. Ignore the business owners who do not want what is best for us.
1119	We moved to Cape Coral for the quiet, peaceful living opportunity. Now, tourism and Snowbirds are overpowering the full-time residents. It appears from recent developments that City Council is only concerned with pleasing this aspect of our community and not paying attention to full time residents' needs.

1120	Stop building apartments without updating traffic patterns. Finish parks projects before starting new ones.
1121	An indoor aquarium is not found south of Sarasota. We are a waterfront community that should be promoting education about our natural resources.
1122	There is no direction, no plan. Infrastructure is outdated, no commercial business complexes to attract companies that aren't service related. We need businesses to offset all the apartments being built and storage units. Town looks and feels dated. Million-dollar homes being built and the city management is locked in antiquated thinking like the Cape is a small backwater outpost. Time to move
1123	Housing completion of one lot at a time is going to prolong construction, it's going to take longer than necessary, beach and water front dining is not ideal, beach is currently non- operational, need one built in the west/northwest, keep up the revitalization of the old parks, and create more natural areas to adventure… walking paths or hiking is very limited.
1124	Very little retail shopping of interest. No bookstores. How about a Marshalls? Wouldn't Cape Coral like to keep its residents $ here in town for shopping?
1125	Cape Coral needs to listen to us instead of developing plans they like
1126	We are overwhelmed with apt. housing, and ugly at that. No vision. Just plop them anywhere. The infrastructure cannot handle this deluge. Roads and bridges are in need of repair and expansion. Too much at one time. What we have needs to be maintained. It is seriously neglected.
1127	Traffic downtown during season is my biggest issue
1128	We love the Cape and live here full time. We also own a business here in the Cape. I understand the current focus on 47th Terrace and Cape Coral Parkway. I also understand why the Pine Island corridor is important to focus on. I would like to see the City come up with a plan to revitalize/update Del Prado Blvd. Quite frankly this could be the most valuable commercial real estate in the Cape but most of the buildings are dated and not properly maintained. The roadway itself is one of the most dangerous in the city. We operate Wild About Popcorn at 1311 Del Prado Blvd South. People speed, run red lights, drive aggressively and the traffic in general is awful. We have customer constantly tell us how difficult it is to get into and out of our parking lot. Thank you for all you do! Ed Caracappa
1129	Please pay more attention to our green spaces and wetlands. Stop commercializing parks like Jaycee. Plant more shade trees. Don't over develop our wetlands. Listen to your residents
1130	The council to actually listen to the residents instead of only thinking of what they want. They never think of anyone other then themselves. They run the city like a dictatorship
1131	Traffic is already bad and we are adding hundreds of new homes and apartments. It's only going to get worse.
1132	Our population is growing but restaurants and shopping has not increased. I'm a Realtor and buyers don't like that we don't have any type of mall or places to shop and eat.
1133	We are 30 years behind ! First water and sewer then homes. Let's raise money on the owners of all the empty real estate. Develop your property or pay higher fees
1134	The commutes are long. Lacking culture. Needs a minor league sports team. Limited retail.
1135	Too many new houses, apartments, & condos. Pay is not keeping up with housing costs; people cannot afford a place to live … by themselves.

1136	Clean up the city, especially people's property. Code enforcement is lacking big time. Clean up trash along the roads, especially in NW Cape. The NW Cape is an eyesore, and canals as well (full of trash). Waste Pro is a joke. Most of the time, they miss horticulture pickups. There are piles of branches all over.
1137	Public input doesn't seem to help as our current city council does what they want. I have lived here for 49 years and have never seen how residences feelings of what they want is not considered. For example, Jaycee Park. I lived in that area many years ago and it should remain a neighborhood park like the way it is. And instead, make a park out of the old country club golf course.
1138	Embrace the area's history, prior to becoming a city. Harney, Seminole, Calusa, Spanish exploration
1139	Land use decisions seem to be made by Individuals not qualified to do so, decisions seem to be self-serving. Another concern is the intensity of the lighting required on new building; we don't need to make it daylight at night.
1140	Lee County is one of the fasted growing counties in the country. But there are no jobs here that pay decent wages and many residents work from home or retired here with a bunch of cash. As the years continue, that is not sustainable for the county. Fort Myers and Cape Coral need to bring in larger corporations, not just healthcare, into this county.
1141	Please leave the existing trees alone at Jaycee Park.
1142	I feel the city is too focused on tourism and is failing the full time residents with poor healthcare and poor schools
1143	Please stop allowing commercial businesses to open in residential areas that aren't stores, restaurants, cafes, salons etc. With the development of the Northwest there should be a dedicated area like Metro Parkway for commercial businesses that isn't a major road into the city or in highly residential areas. This will allow us to become a quainter city with more options where the residents are and also people traveling through the area especially the burnt store corridor. The focus needs to shift from parks and into development of walkable areas of retail businesses for the residents in the city is so much more profitable and more usable with the heat. Stop pouring money into the parks they are fine. Make the roadways prettier trees in medians etc changes the entire vibe of an area.
1144	1)Swells need to be prioritized clean and fixed correctly. 2)City Hall hiring process takes too long. Too many to many steps that are unnecessary. 3) HR department in city hall needs to follow through for hiring and exit interviews. Welcoming packages need to be updated. 4) All new residents should receive a welcome package with all information with local PD., hospitals, homestead process, etc... 5)Future surveys should also be Mail to residents. Not all are comfortable using computers. Especially the elderly. 6)More roads, lanes, or alternative routes to decrease traffic. 7)More parking at city hall so that employees on certain events don't have to park far away and walk. 8) Evening Neighborhood patrols for noise ordinance, criminal activity, watering violations. 9) Hiring and training for Scool resource officer/security instead of police officers. So police officers can be more available to more emergency. 10)A 2- or 4-year college in Cape Coral would be more economical to students. To save on money crossing the bridge, gas, and Time. Less car washes...
1145	Until you manage traffic all you are doing is adding to the problems.
1146	Wish you had left Jaycee Park alone. Some things do not need to be commercial especially in a small, over 55 community surrounding that entire area. Voting everyone out next time for that one.

1147	The city leaders only care about abusing tax dollars. We can no longer depend that they have the citizens health, safety, and wellbeing as a priority. The utilities expansion in one of the poorest neighborhoods after a hurricane and during a massive silent depression at the ridiculous cost of $40,000 each is making families homeless. I'm losing my home of 13 years because you chose not to listen to the people when they said they can't afford it right now. Then you refuse to repair the yacht club which will now cost us hundreds of millions of dollars to replace- that money could've been used for the utilities expansion. You forced a family out of their home years ago to build Lake Meade Park which still sits empty. You've ruined people's lives and still refuse to hold yourself accountable for your corruption and greed. When I moved here 20 years ago, this was a perfect place to raise a family. Now it's like it's run by a bunch of toddlers with their hands in a candy jar. The city leadership has destroyed everything that once made Cape Coral a paradise. Shame on you all
1148	Stop placing apartments and storage units in residential neighborhoods. Need bigger stores such as an outlet area like Miramar. Add beautiful palm trees and make it look like paradise.
1149	No more storage units.
1150	We need to start a beautification projects, housing and business are beginning to look run down. Clean up the town to resemble a paradise that you would want to go to in Florida.
1151	The city council wants to pave the city and make money. I've gone to meetings where they let people talk and then do what they want to make money. We need to vote them all out.
1152	Focus on maintaining historical significance (like Yacht Club) and the unique "small town" feel of a large city, instead of pushing for tourism and a "resort" feel. Evaluate and improve the traffic flow
1153	Traffic is a nightmare! North Cape is always forgotten about. Our roads are terrible with no shoulders or sidewalks for children to walk outside. Stop building and start focusing on improving what's already there

1154	Too many commercial buildings are empty, too many businesses on Cape Coral Parkway and Del Prado that needs cleaning up and landscaping, including the apartments that are rundown and the owners of all the businesses and the apartment complex need to be held accountable to clean up, beautify their landscaping, and update their buildings. I know that Cape Coral has approved commercial businesses coming in, but we need some athletic restaurants not chains in the SW and NW area that serve breakfast, lunch and dinners. We need more retail businesses, for example, clothing, shoes, etc. All the medians in Cape Coral needs to be beautified with more palm trees, flowers and native plants. We have a big problem of too many animals (especially dogs) that are loose and become strays in the city, due to improper fencing, or no fencing on properties, too many residents, walking their dogs, especially little ones with NO LEASH, too many residents that let their dogs out in the front yard to do their business with no leash, too many residents leave their dogs outside in their lanai or backyard and all hours of night till morning barking. With Cape Coral having laws in place to keep the city safe and sound, I would like to see Cape Coral figure out a way to control the amount of stray animals due to the residents of Cape Coral. In the past couple of years, I have seen way too many homeless that Cape Coral City needs to come to a solution. In the past couple of years, I've also noticed a variety of people standing on corners, clean and dressed decent, they do not look homeless - holding up signs and soliciting for money. Cape Coral needs to look into the situation and get control over it. Sidewalks we have them in place in many areas of Cape Coral most of the time only on one side well the other side needs to be done to as I see children or other residents walking on both sides. Cape Coral needs to find the funding to place more sidewalks in residential end busy areas for safety as our city has grown in the past couple years too fast as well as it continues to keep growing (which is not a bad thing). We need to see more traffic lights go up on roadways that I've become busier at intersections. We are stop. Signs are in place. (too many accidents.) Cape Coral needs more RV and trailer storages that have complete electric, covered, 24 hour access, and facilities, not combined with self storages also affordable. With the lack of storage and the expense of having one resident should be able to have no more than two sheds on their property (as of right now, there's only allowed one) as long as there is proper space and permitted. I know that Cape Coral City , mayor and council summons and women are doing their very best keeping our city clean safe and sound. But I think we can do way better. The city has grown tremendously in the past couple years and it's hard to keep up but it's going to keep continuing to grow, and we need to get ahead of it, it's a good thing for economy in our city not bad but again we need to be a step ahead to keep our city clean, beautified safe and sound for all residence. Thank you for giving me and my family the opportunity to have the survey available to the residence of Cape Coral for our opinion and concerns I hope that you consider most or majority of it. The residents of the city are the voice to the keep the city going. Anything here that we have an issue with.
1155	There needs to be a push to cleanup the city, update the utilities and widen/improve the roads. We can't keep growing and pushing for more people to come here if the roads and utilities cannot handle them. The city is beginning to look rundown. That just my 2¢
1156	We are getting too crowded. We need to ensure we have enough drinkable water. We are not mixing affordable housing in with neighborhoods. To many duplexes have been built. Do not build anymore storage units. Keep Jaycee Park green with shade trees and walking paths and another bathroom on the other side.
1157	Need sidewalks Police cars to use turn signals. Affordable housing for seniors. Public local transportation
1158	Without utilities Cape Coral is at population limit. Cape Coral is like a teenager trying to decide who it wants to be when it grows up. Many paths may open but going down some will inevitably close off others. Me? I've been here a year, dragged Down from Boston when my younger child moved to Miami in 2021. Committed to renewing my lease on a spacious pool home for 18 mo after living in a 100 year old shoe box for 20+ years. If I leave after that it will be for a townhouse on Daniels parkway in Ft Myers near Whole Foods Market, Trader Joe's and with real bus service and bike paths, sewer and water for the whole city, and at least some attempt at classical arts and culture. For Christ sake open a few hotels in this town.

1159	Outdoor activities such as the yacht club pool keep us together is a joyful healthy way. Please keep that pool open to Cape Coral Residents is has always been truely valued and used. Walking outside on that dock was something we loved to do along with taking a day at our beach. Fix the yacht club for our residents no need to add businesses there
1160	Imo…too many car washes, mattress stores, tire stores and storage facilities..people dont come here to work, they leave here for jobs in Ft Myers or beyond.. poor city planning… infrastructure is not ready for the droves of people moving here… and you are building affordable housing? $2500 a mo for an apt is NOT affordable housing..wages paid here cannot sustain these types of rents..
1161	With the open-ended permit process of approving virtually anything that passes, we plan to leave FL in 2-3 years. That's what we really think of the Cape
1162	Traffic
1163	Smaller more efficient government
1164	Please save Red fish point. We need to keep some waterfront nature for our future.
1165	It seems nothing is being done to lower taxes. Residential growth alone will not do it, broadening the public/private, residential and business landscape, and attracting some large employer companies, would reduce real estate income taxes for the people who live here. Something has to be done!
1166	The city needs to become more flexible when dealing with new bigger projects. They have to be a partner in getting them approved rather than continuing to find a way to say no.
1167	Cape Coral is a great place to live within SWFL, but limited in attractions. So much housing stock, but mainly for incomes greater than $70K. Cape does not provide an abundance of high paying jobs to support that stock. Cape could generate revenue if it took advantage of tourism as a destination center. Why would someone drive to the Cape if they didn't live here? The Cape is massive, but challenging to understand the sections of the city. Improve signage and placemaking.
1168	Currently the council is ignoring the opinions of the people. Council sits at meetings like they are supreme and the people are beneath them. Council is making bad decisions that will forever change the city. Personally I will be voting against every current council member at any future election. We are ruining beautiful Cape with high rise apartments. Destroying the yacht club and taking it away from the people to use is pathetic. Millions to commercialize the Jaycee Park is a land grab. We have been visiting here for over 30 years and lived here since 2010. Council it taking what was a special place and taking it in the wrong direction.
1169	Help different sections of town offer their own identity. Bring in a college, plant, or an industry that pays well. Sidewalks are essential for safety and quality of life. Create highways with exits across town before it’s too late to do so. Expand public transit. Push for rail to connect with the East Coast.
1170	Storm water run off is a huge concern. The flooding in Cape Coral needs addressed immediately.
1171	We NEED to solve the permit problem. It is adversely impacting development & people’s recovery from Ian.
1172	Cape Coral has a great charm, please try to keep the population density spread out. I fear the cape will become a crime ridden city if we grow to much. Also Traffic is the #1 complaint I hear. anything that can be done to provide alternate routes to popular areas might be helpful.

1173	We should develop water based public transportation between CC and Ft Myers, Ft Myers Beach and highlands
1174	We need to have better public transportation.
1175	Our goal should be to seek upper scale business and cultural development and not the lower income development.
1176	CC needs fewer bars. Downtown is a disaster with traffic and lack of parking. I used to go down at least weekly - now I avoid it as much as possible. CC can't handle the traffic it has, without adding more housing (cars) and commerce (trucks & delivery vehicles). While the Cape is a paradise, it is not good for employment and getting around is not just dealing with congestion, but the dangers of excessive speeders and red light / 4 way stop blowers. It should not take 4 light cycles to get across Pine Island Road. For entertainment and eating out, Punta Gorda is now faster (and safer) for me to go to than downtown Cape (and I am not that far north). Destinations that took less than 15 minutes 5 years ago are now taking 25. CC wants to grow but the growth is unplanned. I know many people who fell in love with the Cape but are looking to move - because of the congestion and poor planning. Perhaps city officials should look at why people moved here and attempt to retain residents and businesses long term.
1177	Available mass transit to ALL areas of the city with commuter parking and buses to reduce rush hour traffic. Two to 5 days toll free bridge crossing to increase holiday sales shopping. Currently residents of Ft Myers avoid shopping here because of the tolls.
1178	We lived through a previous boomtown expansion in Gilbert, AZ in it's heyday. This reminds me of it. They were far more advanced on roadway development and planning for the population growth. They also courted some large corporate operations and negotiated headquarters there. Quality jobs were built that could pay the residents a wage they could afford to live here. The entry level service industry positions are plentiful here but there is not a chance that you can afford to thrive (barely survive) in Cape. Too heavily reliant on snowbird incomes to support the area. We need real jobs for all of the full-time residents.
1179	Need to work on infrastructure and the cost! Way too expensive to get hooked up to City utilities. Assessments are way too expensive. Housing is expensive. Need more commercial development and things to do in the Cape. Take a drive to St. Pete. They did it right.
1180	I’d like to know why a company in New Jersey was hired to do this work instead of a Florida based company? Also, the road are horrendous. Potholes everywhere. The cost of living is forcing teachers out of the area - education in our area is sub par. Have better control to limit the number of storage units and car washes in the area. It looks so tacky.
1181	Cape coral will continue to be a bedroom community to Fort Myers until the leadership (council) creates a public perception that offers inclusion in the decision making of the personality of Cape Coral. Affordable housing, jobs, solicitation of large corporations to move into the Cape, not just homes, car washers, storage units, poor roadways conditions. Get out of parks creations waiting on permits.
1182	I think we have enough storage units and car washes.
1183	More palm tree lined streets and roundabouts. Less lane and stoplights will transform this city. Study Hamilton County Indiana.
1184	More police protection and more enforcement of traffic control
1185	I feel like City Government is not listening at times and has made up their minds in spite of what the majority of the residents want. I feel we elected these people to honor our wishes since we pay their salaries.

1186	LESS CAR WASHES, SHADY ARCADES, STORAGE UNITS, DOLLAR STORES.
1187	Nothing good from this point will help The city was not made to hold every retiree but they are here sooner rather than later it will be all people who planned there retirement but there will be no one to serve them due to the costs of ins and taxes we are not in a good place none of it are fault it just happened
1188	Do something about the traffic , also have someone look at the traffic light not set up very well some light only let a few cars through and then they turn red.
1189	Leave the single-family residential areas the same. Do not rezone to allow large apartments or commercial areas. Develop more sidewalks/bike paths along busier streets.
1190	I don't think they should have turned both previous slotted luxury condo developments into rental communities. One would have been sufficient.
1191	There needs to be a rapid expansion of utilities (water, sewer, broadband) and transportation (public transport, roads/streets). This should be a top priority to prevent falling behind and then having to play catch-up. Even to the extent of expanding into future areas before the need arises.
1192	There is way too much money going to public education. Property taxes need to stop being raised so much. There are potholes in the roads all over town. More sidewalks should be put in.
1193	I don't think we need the commissioners. I am a previous resident of Pasco County and we had 5 for the entire county. 7 commissioners and their salaries are way too much
1194	We need high end businesses not dollar generals, 7-11s and storage spaces. A community College satellite campus of FGCU or FSW, some technology buildings, and headquarters to businesses such as Hertz
1195	The over development & overcrowding of Cape Coral is destroying the nice waterfront community that we hoped it would be. If you drive down Cape Coral Parkway and look at all the run-down apartments and duplexes it is not pretty. Furthermore, there are fewer and fewer parks and outdoor spaces to ride bikes, hike, golf, enjoy the wildlife, etc.
1196	Gems in SE Cape such as the Yacht Club ballroom and Jaycee Park should be preserved. Undergrounding of utilities on major streets such as Del Prado should be pursued.
1197	Leadership needs to listen to what people want and don't want
1198	Cape Coral needs better roads and bridges to alleviate traffic. The city doesn't take care of the canals and the water isn't safe to drink. The Internet is spotty and there aren't many places to enjoy the coastline. Cape Coral needs to think about creating a state park like Honeymoon island in Pinellas county that has open beaches to all that aren't cluttered up with mansions and part-timers. Cape Coral is also not very walkable with how the canals are constructed and the main roads are dangerous. The police need to raise funds by ticketing reckless drivers and speeders. If you started cracking down on crime you wouldn't have to raise property taxes.
1199	The local government does not follow through. My canal has trees, debris, filled out forms. Email said done. Sent pictures of trash back. No one seems to care or respond.
1200	Cape Coral purchased land in NW Cape Coral for the purpose of a family park. The overgrown land remains untouched. Yet money is being spent on older park updates.
1201	No new park projects until Go bond parks are finished. Don't include yacht club. Waste of taxpayer dollars to rebuild a new facility at that location
1202	Question #2 on my survey has no visible text. Cannot answer.
1203	Cape Coral needs a community place of assembly.

1204	While it seems CC asks for public opinions when eliminating park and rec spaces (Hunters Run, Jaycee Park, old golf course on Palm Tree Blvd) they only go thru the motions. They do NOT listen to the majority of the public who oppose these measures.
1205	The city should not be allowing such unconstrained growth. The roads are becoming a zoo, even off-season. Where are the police to control the mayhem we are seeing so often?
1206	The city is already behind on traffic management. More commercial development and high paying jobs are needed. With the state of our road network not sure how people are going to get there.
1207	Again, your survey lacks cohesion and direction. Please stop making up surveys without training! This has no purpose, and has no meaningful data to be extrapolated!
1208	Cape Coral leaders need to come up with more nationally recognized forums. It's hard to explain why a town much smaller, like Punta Gorda, gets more positive press.
1209	Start caring about the current residents and their needs or get voted out
1210	More parks in Southeast area. More public access for fishing on foot, with areas that you can use conventional gear and fly rods as well. Please do not pack housing into areas already dense with houses. Roads cannot handle it.
1211	The infrastructure in Cape Coral is a joke and the traffic is horrendous. The part-time snowbirds only exploit the area for warm weather and drive up housing costs but never contribute to enhancing the community. The city needs to focus on the full-time workers and affordable housing or there will be no services for snowbirds to take advantage of. The canals are dirty and make commuting a nightmare. The city should build some bridges over the canals. Most of the middle class will be gone in a year or two. Good luck because you're turning this into Naples - a city of crotchety old farts that pull guns on people and complain about smells and noise from hurricane cleanup.
1212	We have monitored Cape Coral for a decade before investing. Thus far, we have been impressed with the Police Department and its responsiveness. Living here, less than a year, we do not (yet) have much interaction with other government entities. (Will have MUCH more input over the next few years, I am sure!)
1213	BEFORE WE CONTINUE WITH GROWTH, GET CONTROL AND CLEAN UP OF THE CURRENT POPULATION. TOO MUCH IS ALLOWED TO GO ON WITH NO CARE ENFORCEMENT OF CODES. HONESTLY THIS CITY HAS BECOME A DUMP. WHEN I FIRST MOVED HERE, I TRULY LOVED THIS CITY AND THE CARE THE CITY TOOK TO KEEP IT BEAUTIFUL.
1214	In addition to commercial business development to create more jobs we need more retail shopping as well. Also the infrastructure needs to be ahead of the growing population and development.
1215	Look forward to developing the next 60 years and stop listening to those crying about the last 60 years, yesterday is gone.
1216	Too many cars and not enough roads. City own facilities with not enough parking. Need places to hold indoor parties and personal events.
1217	Please open the beach asap
1218	Cape Coral needs major business in order for residents to live AND work here. These business need to provide a liveable wage for residents to afford to live here ... not just retail and restaurants.

1219	People visit and move here for Fun things to do and the Beautiful environment it should be! Focus on Fun, Food and a Beautiful environment! Clearly the City Parks and Recreation classes, events and functions are fabulous and should be Enhanced and Safe. Please get the garbage throughout the City cleaned up and kept up! Please continually clean up the canals because garbage and poisons go in there all of the time. Currently the City is kinda ugly. Yes, we are big, but have Super Possibilities! We can be the best, prettiest, most talked about City in the Country!
1220	We need to give back to the community and employees of Cape Coral. The increase in housing and food does not equate to employee's salary and is no longer affordable to live.
1221	Beach needs jet ski rental, parasailing
1222	Traffic flow is probably the biggest obstacle to further development in the downtown area. (Cape Coral Pkwy) there is already a ridiculous amount of traffic to get to the bridge at any time of day. Road goes from 3 lanes to 2 lanes in the most densely occupied area. Parking on the street in this area should be eliminated to improve traffic flow. Almost no frequent or reliable public transportation into and out of or around city just adds to the congestion in all areas.
1223	Infrastructure is a huge issue in our city. If we cannot correct this people are going to start leaving.
1224	There should be more control over vacation rental properties. Compliance with registration, compliance with length of stay; enforcement of room tax (goes with registration ...), and the annual registration fee should be more $$$. It seems like Cape is missing a lot of revenue. These short-term rentals create an added burden to the services (waste pick up, police, fire and EMT ...) much more than a typical year-round residential property and what little is being collected probably doesn't cover it.
1225	I have lived in Cape Coral for 35 years. I grew up here. It's sad to see what it has become and what it is going to be. I can't wait until I am vested and can get out.
1226	Need to be put back to the way they were prior to adding the drainage pipes
1227	More waterfront restaurant, more outdoor hiking trails,
1228	City council doesn't have a clue what they did to SW with all these apt complex's. You are deaf to the residents who pay your salary and don't care. We need better listeners and you need to stop wasting money on stupid crap. No electric vehicles before you do something about infrastructure to make commuting easier and efficient for people who work to pay their taxes. Another thing work on insurance for your residents make it affordable and get the governor involved instead of thing about electric vehicles.
1229	Code enforcement needs to be more proactive without needing a complaint. More industrial/small business spaces are needed in order for places like HVAC companies to survive.
1230	The Cape needs improved and wider road infrastructure to handle the growing population which the primary mode of transportation is car.
1231	Please keep the storage facilities out of neighborhoods
1232	The highest priority has to been infrastructure development that will attract the development that is crucial to servicing the growing population
1233	Cape Coral is growing exponentially, the City needs to address the need for wider roads, sidewalks in neighbor hoods, street lights, utilities and so forth. We need a third bridge not one that's widened that will still go back to 2 lanes at the end.

1234	No more car washes or storage units, they each employ like 5 people and take up huge amounts of space that businesses that employ far more people could use and we have more than enough. No more giant apartment complexes. Many have gone up in a short amount of time with nothing done about infrastructure to accommodate the huge influx of residents. Traffic is already terrible in season and everything is too crowded. We need more better paying jobs.
1235	Need to bring more entertainment to the middle/north Cape area to lessen traffic impacts. South Cape is nice but can't be the end all be all.
1236	My question #2 answers are stormwater, utilities, and multimodal roadway. My number one priority is sidewalks. The pedestrians, especially children near schools and bus stops need sidewalks.
1237	No need to waste funding on any new buildings or parking garage at the Yacht Club park. Invest in a centrally located recreational/sport/convention center type facility. Why is the city building tennis facility and letting it be run privately? Let a private company build it and run it.
1238	North east Cape Coral seem to be forgotten . Medians on kismet are overgrown . We have no side walks . The park on Kismet has grass growing on the fill dirt . NE Cape Coral pay taxes a lot of growth is happening in this of the city we should see Improvements and beautification projects.
1239	I think the City needs to increase its commercial base. Additional road options need to be looked (flyovers, I75 options, etc). I don't think City Council always listens to residents' concerns on certain topics of what they want to see (i.e. Jaycee Park, Yacht Club). I think there should be an area where commercial parking is available to the residents that live here in the city. I understand restriction to a certain extent but there should be another option other than going to another city/town to park. Thank you.
1240	With the cost of living in Cape Coral, retail jobs cannot be the leading employment opportunity. Professional jobs and office jobs are needed so that the people who work here, can afford to live here. Stop building retail space that ends up being vacant and concentrate on bringing businesses here that will offer decent employment opportunities. This is no longer a bedroom community of senior citizens and retirees. Please concentrate on developing opportunities so that families can afford to live here. Thank you.
1241	Easier street management. The fact that almost every street has a median is annoying.
1242	I think the two things that Cape Coral needs more is roads, our population is significant and the roads are not design for the amount of traffic, we need more roads to go out of the City. I think we need more parks with trees, not Palms and everywhere where is water we need mangroves, in the parks close to the water and where the bridges are. Big trees and more Trees, palms do not provide shade and also they do not absorb water the same way like a tree, the shade and breeze provided by trees is wonderful for a place this hot.
1243	We do not need more: Dollar type stores, storage units, Aldi's, cheap stores! We want a variety. We need a DSW shoe store, Whole Foods, Trader Joe's, department store (not another Burlington Coat Factory.)
1244	Lets reinforce and renew the things we have and need before expanding. Our roads are really bad and there are too many people for the amount of Police, Fire, and Hospitals we have. We are becoming a big city and still have small town infrastructure. Also, what ever happened to the underground power lines we were talking about?
1245	There is way too much development and the development is so unorganized.
1246	The North end of the City does not offer any social setting or venues for events like the downtown offers.

1247	The economic development efforts in the city have been largely unsuccessful since the city believes they need to compete with Lee County. This is a waste of time. Lee County has more infrastructure and exits off I-75, which we do not. The city should focus on gaps in economic development by targeting regional offices of business that exist out-of-state or in other parts of the state.
1248	I have lived in the Cape my whole life. I am a city employee and can't even afford to live by my own in the city I call home. It is outrageous how rent and home prices are through the roof. The city is being bought out by people with money moving here. Locals are being driven out because we simply can't afford to live here, especially on current wages.

Economic Development Strategic Plan - RCM2342AS

Task 2 Report -- Appendices

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Appendix Exhibit 2.1 - Cape Compass 2030 Strategic Plan			
6 Pillars	**Abbrev.**	**Description**	**Synposis**
Talent Supply & Education	**TS&E**	Goal: Cultivate an engaged and informed community and workforce	Develop high quality workforce
Quality Of Life & Quality Places	**QLQP**	Goal: Preserve and protect Cape Coral's natural resources for current and future generations	Protect natural resources
Infrastructure & Growth Leadership	**I&GL**	Goal: Invest in resilient infrastructure	Invest in resilient infrastructure
Civic & Governance Systems	**C&GS**	Goal: Deliver exceptional City services and high-quality amenities	Deliver exceptional City services and amenities
		Goal: Maintain a financially sound government and high-performing organization	Provice fiscally sound government
Innovation & Economic Development	**I&ED**	Goal: Create a community of prosperous residents, thriving neighborhoods, and successful businesses	Encourage strong economy

Legend	
TS&E	Talent Supply & Education
QLQP	Quality Of Life & Quality Places
I&GL	Infrastructure & Growth Leadership
C&GS	Civic & Governance Systems
BC&C	Business Climate & Competitiveness
I&ED	Innovation & Economic Development

Appendix Exhibit 2.2 - Cape Coral Climate Change Resiliency Strategy			
6 Pillars	**Abbrev.**	**Description**	**Synopsis**
Quality Of Life & Quality Places	**QLQP**	Goal: Develop the temporal and spatial context for Sea-Level Rise (SLR) adaptation planning in the City.	Prepare for sea-level rise
		Goal: Ensure adequate protection of the built environment through soft and hard shoreline stabilization that seeks to maintain a static shoreline position	Provide soft and hard shoreline stabilization
		Goal: Accommodate increasing sea levels and the additional flooding that will result by adapting the built environment and enhancing the resiliency of the natural environment where it is economically and ecologically practicable to do so.	Enhance the resiliency of the natural environment
		Goal: Reduce vulnerability in the built environment and preserve coastal ecosystems through the orderly abandonment and /or landward relocation of structures and associated infrastructure.	Reduce shoreline develoopemnt

Legend	
TS&E	Talent Supply & Education
QLQP	Quality Of Life & Quality Places
I&GL	Infrastructure & Growth Leadership
C&GS	Civic & Governance Systems
BC&C	Business Climate & Competitiveness
I&ED	Innovation & Economic Development

Appendix Exhibit 2.3 - Cape Coral Comprehensive Plan			
6 Pillars	**Abbrev.**	**Description**	**Synopsis**
Talent Supply & Education	**TS&E**	Goal: Provide a public school system including Charter Schools that offers a high quality educational environment, provides accessibility for all of its students, and ensures adequate school capacity to accommodate enrollment demand.	Provide high quality public and charter school education system
Quality Of Life & Quality Places	**QLQP**	Goal: Protect Environmental Resources	Protect the environment
		Goal: Increase public awareness of and access to coastal natural resources	Enhance natural resources
		Goal: Protect Historic Resources	Protect historic resources
		Goal: Provide good quality housing in safe, clean neighborhoods	Provide quality housing in safe neighborhoods
		Goal: Offer a broad choice of options in both housing type and tenure to meet the needs of present and future residents of the City, regardless of age or income status	Offer choices in housing type and tenure
		Goal: Provide adequate stormwater drainage to afford reasonable protection from flooding and to prevent degradation of quality of receiving waters	Provide storm water protection
		Goal: Maintain the functions of natural groundwater aquifer recharge areas	Protect groundwater aquifer
		Goal: Protect and conserve its potable water resources.	Conserve water resources
		Goal: Reduce quantity of non-hazardous solid waste delivered to the Lee County solid waste disposal facilities from Cape Coral and discourage littering and illegal dumping.	Reduce solid waste
		Goal: Discourage littering and illegal dumping.	Discourage littering and dumping

Appendix Exhibit 2.3 - Cape Coral Comprehensive Plan

6 Pillars	Abbrev.	Description	Synopsis
Quality Of Life & Quality Places	QLQP	Goal: Provide a system of parks, recreational facilities, and open spaces meet the needs of all population segments and to preserve, protect, and enhance the natural amenities of the area	Provide green space
		Goal: Preserve, protect, and enhance the natural amenities of the area	Protect and enhance natural amenities
Civic & Governance Systems	C&GS	Goal: Protect public and private investment in existing facilities, and promotes orderly, compact, and efficient urban growth.	Protect public investments
		Goal: Maintain programs for mitigation of damage from natural or man-made disasters.	Fund disaster relief programs
		Goal: Provide intergovernmental coordination to protect environmental and coastal resources.	Coordinate government resource protection
		Goal: Achieve maximum coordination with other governmental jurisdictions, agencies, and entities	Coordinate with other governments
		Goal: Ensure that private property rights are considered in local decision-making.	Respect private property rights
Innovation & Economic Development	I&ED	Goal: Provide adequate public facilities and services concurrent with new development.	Match public services to development
		Goal: Provide adequate public facilities	Provide adequate public facilities
		Goal: Encourage the efficient use of community infrastructure and natural resources to assure orderly, efficient growth of the city	Efficiency of use of infrastructure and natural resources
		Goal: Provide required public facilities that promotes orderly, compact, and efficient urban growth.	Support orderly, compact, and efficient urban growth.

Appendix Exhibit 2.3 - Cape Coral Comprehensive Plan			
6 Pillars	**Abbrev.**	**Description**	**Synopsis**
Innovation & Economic Development	**I&ED**	Goal: Provide sanitary sewer, drainage, and potable water facilities, and coordinate with private and County sources for provision of solid waste facilities to meet the existing and projected needs	Ensure infrastructure capacity for projected needs
		Goal : Provide an efficient, balanced and safe motorized and non-motorized transportation system, which is both economical and in accord with future land use and environmental goals.	Provide efficient transportation systems
		Goal : Provide diverse travel choices to ensure mobility, sustain environmental quality, reduce energy consumption, and increase the quality of life	Offer diverse travel choices
		Goal : Assure availability of transportation services to all citizens with a special consideration for the elderly and handicapped.	Serve elderly and handicapped with public transportation
		Goal : The transportation system will emphasize safety and aesthetics.	Provide safe and aesthic trsnaportaion systems
		Goal : The City's transportation system will be an integrated and coordinated part of the county, regional, and state transportation system.	Integrate city transportation system into regional network
		Goal : The transportation network will promote and encourage positive economic development	Promote ecoonimic development through transporation network
		Goal : Establish and strategically promote public financial incentives to achieve an economically balanced community with a superior quality of life, employment opportunities for current and future residents and a diversified tax base.	Incentivize economic development

Appendix Exhibit 2.3 - Cape Coral Comprehensive Plan			
6 Pillars	**Abbrev.**	**Description**	**Synopsis**
Legend			
TS&E	Talent Supply & Education		
QLQP	Quality Of Life & Quality Places		
I&GL	Infrastructure & Growth Leadership		
C&GS	Civic & Governance Systems		
BC&C	Business Climate & Competitiveness		
I&ED	Innovation & Economic Development		

Appendix Exhibit 2.4 - Resilient Lee			
6 Pillars	**Abbrev.**	**Description**	**Synopsis**
Talent Supply & Education	**TS&E**	Goal: Create public education and awareness campaigns to reduce the	Educate public for impact on natural resources
		Goal: Identify partnerships and incentives supporting the workforce, such as affordable housing near jobs and availability of technical certifications, to draw new populations to the area and encourage the generations raised in Lee County to stay here	Encourage workforce development
		Goal: Rebuild more public access to natural resources	Expand public access to natural resources
		Goal: Improve workforce participation by increasing skilled and credentialed workers to fill jobs in Lee County with an emphasis on making technical certifications available, drawing new populations to the area and incentivizing younger generations to stay in Lee County	Encourage workforce growth
		Goal: Create ways to partner and leverage resources to increase shared ownership of education, to improve outcomes and opportunities from early childhood education to career	Improve means of providing education services
		Goal: Create systems that foster lifelong learning and training opportunities for all	Foster lifelong learning
		Goal: Address outside variables (housing, transportation, mental health, childcare, etc.) that hinder education and workforce	Address education and workforce development constraints
Quality Of Life & Quality Places	**QLQP**	Goal: Address workforce housing issues and development incentives for vulnerable populations and communities, particularly in regard to homeless individuals	Address workforce housing and homelessness issues
		Goal: Direct actions to improve hydrological and ecological conditions	Improve hydrological and ecological conditions

Appendix Exhibit 2.4 - Resilient Lee			
6 Pillars	**Abbrev.**	**Description**	**Synopsis**
Infrastructure & Growth Leadership	**I&GL**	Goal: Preserving, hardening, and integrating redundant systems into critical infrastructure, such as water, power, transportation, communications, medical facilities, and sanitary infrastructure systems, while including a holistic approach to both public and private providers of services	Development of redundant systems in critical infrastructure
		Goal: Hardening critical facilities such as potable water systems, Emergency Operations Centers, emergency shelters, fire stations, and hospitals to ensure the first line of defense in an emergency is operational	Hardening of critical facilities in first line of emergency defense
Civic & Governance Systems	**C&GS**	Goal: Plan for improved short-term recovery response (immediately post-disaster), including but not limited to	Plan for improved recovery response
		Goal: Increase inter-governmental coordination for long-term planning for	Increase inter-governmental coordination
		Goal: Identify short-term actions that support the rapid recovery of businesses, including access to	Fast-track business recovery support
		Goal: Access through mobile services and for special needs environments that incudes necessary services and accessibility to facilities built to provide	Provide mobile health services
		Goal: Coordination provided by a resilience hub with dependable and real time information and based on	Coordination and mapping of critical health care infrastructure
		Goal: Mental health response in real time and especially through one-year anniversary with support for staff and considerations for workforce retention and well-being, including	Real time counseling for workforce retention and well-being
		Goal: Regulatory requirements for special services, supportive living centers, options for providers, overall	Provision of special services and overall support for citizens with disabilities

Appendix Exhibit 2.4 - Resilient Lee			
6 Pillars	**Abbrev.**	**Description**	**Synopsis**
Civic & Governance Systems	**C&GS**	Goal: Pre-disaster planning for supplies, evacuation, fuel, and shelter, especially for special needs during emergencies, and cascading points of failure of weak links, including reducing	Pre-disaster planning for critical supply materials and procedures
		Goal: Addressing increased shelter needs and return to normal operations	Addressing increased shelter needs and return to normal operations for schools
		Goal: Determine regulatory actions and incentives to address impacts of natural resources, including identifying mixed-use spaces for that can be used	Ease regulatory restrictions on temporary use of properties for natural disaster relief staging
Business Climate & Competitiveness	**BC&C**	Goal: Address immediate and long-term issues related to insurance that individual homeowners and others are facing: ◦ Develop solutions to support individual homeowners and residences in navigating the insurance claim process related to Hurricane Ian; ◦ Identify potential solutions to address difficulties for individual homeowners and others in securing insurance coverage or significantly increased rates becoming a barrier to homeownership	Address immediate and long-term issues related to homeowners insurance
Innovation & Economic Development	**I&ED**	Goal: Prioritize industry-sector growth to build a resilient economy	Build a resilient economy
		Goal: Consideration to reduce costs of housing and consistency of codes and	Reducing costs of housing and improving codes and permitting efficiency
		Goal: Zoning changes to comprehensive planning that increases	Zoning changes tot increase density and redevelopment

Legend	
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Appendix Exhibit 2.5 - Southwest Florida Comprehensive Economic Development Strategy			
6 Pillars	**Abbrev.**	**Description**	**Synopsis**
Talent Supply & Education	**TS&E**	Goal: Provide sufficient funding and encourage flexibility to allow regional stakeholders to address local needs in education, training and workforce development.	Provide funding for education, training and workforce development.
		Goal: Ensure educational systems and workforce training that support innovation and creativity	Support innovation and creativity in educational systems and workforce training
Quality Of Life & Quality Places	**QLQP**	Goal: Protect natural resources to support quality environment and eco-tourism	Protect natural resources and encourageand eco-tourism
		Goal: Develop projects that improve the region's quality of life	Develop projects that improve quality of life
		Goal: Increase the supply of workforce housing in the region	Increase the supply of workforce housing
		Goal: Expand arts and cultural identity	Expand arts and cultural identity
Infrastructure & Growth Leadership	**I&GL**	Goal: Develop transportation systems to support a prosperous, globally competitive economy while minimizing impacts to the natural environment	Develop transportation systems to support the economy while minimizing impacts to the natural environment
		Goal: Promote available ready-sites and buildings	Promote available ready-sites and buildings
Civic & Governance Systems	**C&GS**	Goal.: Improve public/private/civic cooperation, collaboration, and communication of the Region's economic strategies	Improve public/private collaboration and communication of economic strategies
		Goal: Improve regional coordination of economic development, land use, infrastructure, water and natural resource decision making	Improve coordination of economic development, land use, infrastructure, water and natural resource decision making
		Goal: Support the region's growing elderly population	Support the growing elderly population
Business Climate & Competitiveness	**BC&C**	Goal: Develop projects and programs that support existing and new business	Develop projects and programs that support existing and new business
		Goal: Increase investment in business development and placement in the Region	Increase investment in business development and attraction
		Goal: Monitor CEDS Performance Measures	Monitor strategy Performance Measures

Appendix Exhibit 2.5 - Southwest Florida Comprehensive Economic Development Strategy			
6 Pillars	**Abbrev.**	**Description**	**Synopsis**
Innovation & Economic Development	**I&ED**	Goal: Provide funding for ongoing economic development activities	Provide funding for ongoing economic development activities
		Goal: Provide technical assistance and use new technology to promote job growth	Provide technical assistance and use new technology to promote job growth
		Goal: Build seamless information technology infrastructure	Build seamless information technology infrastructure
		Goal: Encourage alternative energy production and green product industries	Encourage alternative energy production and green product industries
		Goal: Brand the region as a hub to attract and retain entrepreneurs	Focus marketing on attraction & retention of entrepreneurs

Legend	
TS&E	Talent Supply & Education
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Appendix Exhibit 2.6 - Urban Land Institute Advisory Panel -- Cape Coral			
6 Pillars	**Abbrev.**	**Description**	**Synopsis**
Talent Supply & Education	**TS&E**	Goal: Celebrate the Natural Environment through Restoration and Education	Increase public awareness of the natural environment
Quality Of Life & Quality Places	**QLQP**	Goal: Create identifiable Districts and promote wayfinding for visitors and residents	Promote wayfinding for identifiable districts
		Goal: Define and Strengthen Cape Coral Neighborhoods	Define and strengthen neighborhoods
		Goal: Create a "Regional Park" that is Programmed to Include City-Wide Events	Create a Regional Park
		Goal: Identify and Secure Additional Places for Public Access to the Waterfront	Increase public access to the waterfront
		Goal: Add Cultural Amenities to Reflect a More Diverse Population and Attract Visitors	Increase cultural amenities
		Goal: Review the Development Codes to Incentivize Creativity and Mandate Quality	Incentivize creativity and quality in development codes
		Goal: Resilience Policies and Guidelines Need to Underpin All Land Use Decisions	Resilience policies to underpin all land use decisions
Infrastructure & Growth Leadership	**I&GL**	Goal: Develop a "Pedestrian First" Mentality to Transportation Planning	Develop a "Pedestrian First" transportation plan
		Goal: Create the Infrastructure Necessary for Non-Personal Automobile Use	Create a pedestrian Infrastructure

Legend	
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Appendx Exhibit 2.7 - Econographics Market Profile - Fort Lauderdale

Data #		FL benchmark	*Fort Lauderdale Summary* Item	Index	Advantages	Index target
Part 1 - Demographics						
Population Growth						
1	Population Change 2012-2022 %	19.5%	15.9%	*81.4*		↑
Age and Gender						
2	Younger Workers Age group 18-44 (2022)	33.4%	35.2%	*105.4*	■	↑
3	Mature Workers Age group 45-64 (2022)	25.7%	28.4%	*110.5*	■	↑
4	Median age (2022)	42.7	43.1	*100.9*		↓
5	Male/Female ratio (2022)	97.0	112.4	*115.9*		↓
Racial Diversity						
6	Total non-white/white ratio (2022)	27.10	20.90	*77.1*		↑
Language Competence						
7	% English Only Spoken at home (2022)	69.8%	71.4%	*102.3*	■	↑
Households and median income						
8	Avg. Size of Household (2022)	2.52	2.29	*90.7*		↑
9	Median Household income (2022)	$69,303	$81,544	*117.7*	■	↑
Educational Attainment						
10	% College Grads (2022)	44.5%	61.3%	*137.8*	■	↑
Housing						
11	Home Ownership Rate (2022)	67.2%	51.4%	*76.5*		↑
12	Median home value (2022)	$354,100	$485,500	*137.1*		↓
Cost of Living						
13	Cost of living index (2021)	101.9	112.2	*110.1*		↓
Quality of Life						
14	Crime index (2023)	100.0	145.0	*145.0*		↓
15	Physicians per 1K population (2022)	21.1	22.1	*104.7*	■	↑
16	Arts, leisure, tourism & hospitality empl. per 1K pop. (2022)	51.3	63.1	*123.0*	■	↑
Part 2 - Economics						
Labor Market Status						
17	Labor force participation rate (2022)	59.2%	66.3%	*112.0*	■	↑
Area Business Patterns						
18	Goods/Service producing industries ratio (2022)	17.4	12.9	*73.7*		↑
Average Hourly Wages - Goods Producing Industries						
19	Total Goods producing workers hrly wages (2022)	$24.38	$22.89	*93.9*	■	↓
Average Hourly Wages - Service Producing Industries						
20	Total Service producing workers hrly wages (2022)	$24.29	$28.29	*116.5*		↓
Real Estate - Commercial and Industrial						
21	Avg. Office Rent/sf (2023)	$33.58	$38.04	*113.3*		↓
22	Avg. Indus'l Rent/sf (2023)	$10.96	$14.16	*129.2*		↓
23	Avg. Commc'l/Industrial Land Price/acre (2023)	$57,968	$1,437,198	*2479.3*		↓

Appendx Exhibit 2.7 - Econographics Market Profile - Fort Lauderdale

Data #		FL benchmark	*Fort Lauderdale Summary* Item	Index	Advantages	Index target
Electric Rates						
24	Commercial electricity rate (cents/kwh) (2023)	11.30	11.24	*99.5*	■	↓
25	Industrial electricity rate (cents/kwh) (2023)	9.49	8.71	*91.8*	■	↓
Part 3 - Market Access						
Market Potential						
26	% of US within 300-mile radius (2023)	7.1%	5.6%	*79.1*		↑
Retail Sales						
27	Retail sales per capita (2023)	$10,660	$14,230	*133.5*	■	↑
Worker Mobility						
28	Mean travel time to Work - minutes (2022)	27.9	25.3	*90.7*		↑
29	Commute outside place of residence (2022)	51.3%	48.3%	*94.2*		↑
30	Worked from home (2022)	16.4%	20.0%	*122.0*		↓
31	2 or more vehicles available (2022)	44.1%	40.2%	*91.2*		↑
Airport Access						
32	Travel time to nearest major airport - minutes (2023)	45.0	16.0	*35.6*	■	↓

Scoring Quartiles							
Scoring Quartiles	75.1	100.0	4th quartile - Very Competitive	**Legend**	**Total**	**13**	
	50.1	75.0	3rd quartile - Competitive	*Meets criteria for **Advantage***		■	**Score**
	25.1	**50.0**	**2nd quartile - Somewhat Competitive**	*Higher index is more favorable*		↑	**40.6**
	0	25.0	1st quartile - Not Competitive	*Lower Index is more favorable*		↓	

Appendix Exhibit 2.8 - Econographics Market Profile - Orlando			Orlando Summary			
Data #		FL benchmark	*Item*	*Index*	**Advantages**	*Index target*
Part 1 - Demographics						
Population Growth						
1	Population Change 2012-2022 %	15.2%	26.7%	*176.0*	■	↑
Age and Gender						
2	Younger Workers Age group 18-44 (2022)	33.4%	47.8%	*143.1*	■	↑
3	Mature Workers Age group 45-64 (2022)	25.7%	20.0%	*77.8*		↑
4	Median age (2022)	41.1	32.4	*78.8*	■	↓
5	Male/Female ratio (2022)	97.0	103.1	*106.3*		↓
Racial Diversity						
6	Total non-white/white ratio (2022)	1.27	2.55	*200.7*	■	↑
Language Competence						
7	% English Only Spoken at home (2022)	69.8%	60.9%	*87.2*		↑
Households and median income						
8	Avg. Size of Household (2022)	2.52	2.32	*92.0*		↑
9	Median Household income (2022)	$69,303	$65,354	*94.3*		↑
Educational Attainment						
10	% College Grads (2022)	44.5%	54.8%	*123.1*	■	↑
Housing						
11	Home Ownership Rate (2022)	67.2%	40.4%	*60.1*		↑
12	Median home value (2022)	$354,100	$389,900	*110.1*		↓
Cost of Living						
13	Cost of living index (2021)	101.9	93.5	*91.8*	■	↓
Quality of Life						
14	Crime index (2023)	100.0	167.0	*167.0*		↓
15	Physicians per 1K population (2022)	21.1	27.2	*128.9*	■	↑
16	Arts, leisure, tourism & hospitality empl. per 1K pop. (2022)	51.3	81.8	*159.4*	■	↑
Part 2 - Economics						
Labor Market Status						
17	Labor force participation rate (2022)	59.2%	70.6%	*119.2*	■	↑
Area Business Patterns						
18	Goods/Service producing industries ratio (2022)	17.4	12.8	*73.5*		↑
Average Hourly Wages - Goods Producing Industries						
19	Total Goods producing workers hrly wages (2022)	$24.38	$30.50	*125.1*		↓
Average Hourly Wages - Service Producing Industries						
20	Total Service producing workers hrly wages (2022)	$24.29	$26.27	*108.2*		↓
Real Estate - Commercial and Industrial						
21	Avg. Office Rent/sf (2023)	$33.58	$26.58	*79.1*	■	↓
22	Avg. Indus'l Rent/sf (2023)	$10.96	$9.63	*87.9*	■	↓
23	Avg. Commc'l/Industrial Land Price/acre (2023)	$57,968	$200,890	*346.6*		↓

Appendix Exhibit 2.8 - Econographics Market Profile - Orlando

Data #		FL benchmark	Orlando Summary: Item	Index	Advantages	Index target
Electric Rates						
24	Commercial electricity rate (cents/kwh) (2023)	11.30	9.77	*86.5*	■	↓
25	Industrial electricity rate (cents/kwh) (2023)	9.49	9.99	*105.3*		↓
Part 3 - Market Access						
Market Potential						
26	% of US within 300-mile radius (2023)	7.1%	6.8%	*95.8*		↑
Retail Sales						
27	Retail sales per capita (2023)	$10,660	$10,468	*98.2*		↑
Worker Mobility						
28	Mean travel time to Work - minutes (2022)	27.9	25.6	*91.8*		↑
29	Commute outside place of residence (2022)	51.3%	41.1%	*80.1*		↑
30	Worked from home (2022)	16.4%	17.2%	*104.9*		↓
31	2 or more vehicles available (2022)	44.1%	46.4%	*105.2*	■	↑
Airport Access						
32	Travel time to nearest major airport - minutes (2023)	45.0	19.0	*42.2*	■	↓

Scoring Quartiles				Legend		
75.1	100.0	4th quartile - Very Competitive		**Legend**	**Total**	**14**	
50.1	75.0	3rd quartile - Competitive		*Meets criteria for **Advantage***	■	**Score**
25.1	**50.0**	**2nd quartile - Somewhat Competitive**		*Higher index is more favorable*	↑	**43.8**
0	25.0	2nd quartile - Somewhat Competitive		*Lower Index is more favorable*	↓	

Appendix Exhibit 2.9 - Econographics Market Profile - Palm Bay

Data #		*FL benchmark*	*Palm Bay Summary* *Item*	*Index*	***Advantages***	*Index target*
Part 1 - Demographics						
Population Growth						
1	Population Change 2012-2022 %	15.15%	24.11%	*159.1*	■	↑
Age and Gender						
2	Younger Workers Age group 18-44 (2022)	33.4%	33.0%	*98.8*		↑
3	Mature Workers Age group 45-64 (2022)	25.7%	24.5%	*95.3*		↑
4	Median age (2022)	42.7	42.3	*99.1*	■	↓
5	Male/Female ratio (2022)	97.0	90.4	*93.2*	■	↓
Racial Diversity						
6	Total non-white/white ratio (2022)	1.27	0.97	*76.3*		↑
Language Competence						
7	% English Only Spoken at home (2022)	69.8%	82.3%	*117.9*	■	↑
Households and median income						
8	Avg. Size of Household (2022)	2.52	2.92	*115.7*	■	↑
9	Median Household income (2022)	$69,303	$71,645	*103.4*	■	↑
Educational Attainment						
10	% College Grads (2022)	44.5%	36.6%	*82.2*		↑
Housing						
11	Home Ownership Rate (2022)	67.2%	78.5%	*116.8*	■	↑
12	Median home value (2022)	$354,100	$283,300	*80.0*	■	↓
Cost of Living						
13	Cost of living index (2021)	101.9	90.0	*88.3*	■	↓
Quality of Life						
14	Crime index (2023)	100.0	82.0	*82.0*	■	↓
15	Physicians per 1K population (2022)	21.1	16.7	*79.3*		↑
16	Arts, leisure, tourism & hospitality empl. per 1K pop. (2022)	51.3	37.3	*72.8*		↑
Part 2 - Economics						
Labor Market Status						
17	Labor force participation rate (2022)	59.2%	59.6%	*100.7*	■	↑
Area Business Patterns						
18	Goods/Service producing industries ratio (2022)	17.4	24.4	*140.0*	■	↑
Average Hourly Wages - Goods Producing Industries						
19	Total Goods producing workers hrly wages (2022)	$24.38	$33.28	*136.5*		↓
Average Hourly Wages - Service Producing Industries						
20	Total Service producing workers hrly wages (2022)	$24.29	$25.93	*106.8*		↓
Real Estate - Commercial and Industrial						
21	Avg. Office Rent/sf (2023)	$33.58	$15.28	*45.5*	■	↓
22	Avg. Indus'l Rent/sf (2023)	$10.96	$9.54	*87.0*	■	↓
23	Avg. Commc'l/Industrial Land Price/acre (2023)	$57,968	$493,746	*851.8*		↓

Appendix Exhibit 2.9 - Econographics Market Profile - Palm Bay

Data #		FL benchmark	*Palm Bay Summary* Item	Index	Advantages	Index target
Electric Rates						
24	Commercial electricity rate (cents/kwh) (2023)	11.30	11.24	*99.5*	■	↓
25	Industrial electricity rate (cents/kwh) (20223	9.49	8.71	*91.8*	■	↓
Part 3 - Market Access						
Market Potential						
26	% of US within 300-mile radius (2023)	7.1%	6.4%	*90.3*		↑
Retail Sales						
27	Retail sales per capita (2023)	$10,660	$7,901	*74.1*		↑
Worker Mobility						
28	Mean travel time to Work - minutes (2022)	27.9	26.5	*95.0*		↑
29	Commute outside place of residence (2022)	51.3%	62.7%	*122.2*	■	↑
30	Worked from home (2022)	16.4%	11.9%	*72.6*	■	↓
31	2 or more vehicles available (2022)	44.1%	36.8%	*83.4*		↑
Airport Access						
32	Travel time to nearest major airport - minutes (2023)	45.0	16.0	*35.6*	■	↓

Scoring Quartiles						
75.1	100.0	4th quartile - Very Competitive	**Legend**	**Total**	**19**	
50.1	**75.0**	**3rd quartile - Competitive**	*Meets criteria for* ***Advantage***		■	**Score**
25.1	50.0	2nd quartile - Somewhat Competitive	*Higher index is more favorable*		↑	**59.4**
0	25.0	1st quartile - Not Competitive	*Lower Index is more favorable*		↓	

Appendix Table 2.10 - Econographics Market Profile - Pompano Beach

Data #		FL benchmark	Pompano Beach Summary			
			Item	*Index*	***Advantages***	*Index target*
Part 1 - Demographics						
Population Growth						
1	Population Change 2012-2022 %	15.2%	31.6%	*208.6*	■	↑
Age and Gender						
2	Younger Workers Age group 18-44 (2022)	33.4%	36.0%	*107.8*	■	↑
3	Mature Workers Age group 45-64 (2022)	25.7%	26.9%	*104.7*	■	↑
4	Median age (2022)	42.7	42.7	*100.0*	■	↓
5	Male/Female ratio (2022)	97.0	113.0	*116.5*		↓
Racial Diversity						
6	Total non-white/white ratio (2022)	1.27	2.17	*170.8*	■	↑
Language Competence						
7	% English Only Spoken at home (2022)	69.8%	58.7%	*84.1*		↑
Households and median income						
8	Avg. Size of Household (2022)	2.52	2.33	*92.5*		↑
9	Median Household income (2022)	$69,303	$83,929	*121.1*	■	↑
Educational Attainment						
10	% College Grads (2022)	44.5%	33.7%	*75.7*		↑
Housing						
11	Home Ownership Rate (2022)	67.2%	58.2%	*86.6*		↑
12	Median home value (2022)	$354,100	$341,100	*96.3*	■	↓
Cost of Living						
13	Cost of living index (2021)	101.9	110.7	*108.6*		↓
Quality of Life						
14	Crime index (2023)	100.0	120.0	*120.0*		↓
15	Physicians per 1K population (2022)	21.1	9.3	*44.4*		↑
16	Arts, leisure, tourism & hospitality employ. per 1K pop. (2022)	51.3	62.9	*122.7*	■	↑
Part 2 - Economics						
Labor Market Status						
17	Labor force participation rate (2022)	59.2%	61.9%	*104.5*	■	↑
Area Business Patterns						
18	Goods/Service producing industries ratio (2022)	17.4	22.5	*128.8*	■	↑
Average Hourly Wages - Goods Producing Industries						
19	Goods producing workers hrly wages (2022)	$24.38	$18.61	*76.4*	■	↓
Average Hourly Wages - Service Producing Industries						
20	Service producing workers hrly wages (2022)	$24.29	$24.11	*99.3*	■	↓
Real Estate - Commercial and Industrial						
21	Avg. Office Rent/sf (2023)	$33.58	$24.64	*73.4*	■	↓
22	Avg. Indus'l Rent/sf (2023)	$10.96	$17.17	*156.7*		↓
23	Avg. Commercial/Industrial Land Price/acre (2023)	$57,667	$2,057,193	*3567.3*		↓
Electric Rates						
24	Commercial electricity rate (cents/kwh) (2023)	11.30	11.34	*100.4*		↓

Appendix Table 2.10 - Econographics Market Profile - Pompano Beach						
		FL	*Pompano Beach Summary*			
Data #		*benchmark*	*Item*	*Index*	**Advantages**	*Index target*
25	Industrial electricity rate (cents/kwh) (2023)	9.49	8.68	*91.5*	■	↓
Part 3 - Market Access						
Market Potential						
26	% of US within 300-mile radius (2023)	7.1%	5.7%	*79.5*		↑
Retail Sales						
27	Retail sales per capita (2023)	$10,660	$9,534	*89.4*		↑
Worker Mobility						
28	Mean travel time to Work - minutes (2022)	29	29.2	*100.7*	■	↑
29	Commute outside place of residence (2022)	46.8%	64.3%	*137.4*	■	↑
30	Worked from home (2022)	15.1%	11.5%	*76.2*	■	↓
31	2 or more vehicles available (2022)	44.0%	39.2%	*89.1*		↑
Airport Access						
32	Travel time to nearest major airport - minutes (2023)	45.0	28.0	*62.2*	■	↓

Scoring Quartiles	75.1	100.0	4th quartile - Very Competitive	**Legend**	**Total** 18	
	50.1	**75.0**	**3rd quartile - Competitive**	*Meets criteria for* ***Advantage***	■	**Score**
	25.1	50.0	2nd quartile - Somewhat Competitive	*Higher index is more favorable*	↑	**56.3**
	0	25.0	1st quartile - Not Competitive	*Lower Index is more favorable*	↓	

Appendix Exhibit 2.11 - Econographics Market Profile - Port St. Lucie

Data #		FL benchmark	Port St. Lucie Summary: Item	Index	Advantages	Index target
Part 1 - Demographics						
Population Growth						
1	Population Change 2012-2022 %	15.2%	37.4%	*246.8*	■	↑
Age and Gender						
2	Younger Workers Age group 18-44 (2022)	33.4%	30.6%	*91.6*		↑
3	Mature Workers Age group 45-64 (2022)	25.7%	27.3%	*106.2*	■	↑
4	Median age (2022)	41.1	39.6	*96.4*	■	↓
5	Male/Female ratio (2022)	97.0	99.7	*102.8*		↓
Racial Diversity						
6	Total non-white/white ratio (2022)	1.27	1.08	*85.1*		↑
Language Competence						
7	% English Only Spoken at home (2022)	69.8%	72.1%	*103.3*	■	↑
Households and median income						
8	Avg. Size of Household (2022)	2.50	2.80	*112.1*	■	↑
9	Median Household income (2022)	$65,081	$70,613	*108.5*	■	↑
Educational Attainment						
10	% College Grads (2022)	44.5%	39.6%	*89.0*		↑
Housing						
11	Home Ownership Rate (2022)	67.2%	84.6%	*125.9*	■	↑
12	Median home value (2022)	$354,100	$364,300	*102.9*		↓
Cost of Living						
13	Cost of living index (2021)	101.9	90.4	*88.7*	■	↓
Quality of Life						
14	Crime index (2023)	100.0	90.0	*90.0*	■	↓
15	Physicians per 1K population (2022)	21.1	17.1	*81.0*		↑
16	Arts, leisure, tourism & hospitality empl. per 1K pop. (2022)	51.3	36.0	*70.3*		↑
Part 2 - Economics						
Labor Market Status						
17	Labor force participation rate (2022)	59.2%	57.7%	*97.5*		↑
Area Business Patterns						
18	Goods/Service producing industries ratio (2022)	17.4	16.0	*91.8*		↑
Average Hourly Wages - Goods Producing Industries						
19	Total Goods producing workers hrly wages (2022)	$24.38	$26.62	*109.2*		↓
Average Hourly Wages - Service Producing Industries						
20	Total Service producing workers hrly wages (2022)	$24.29	$23.11	*95.1*	■	↓
Real Estate - Commercial and Industrial						
21	Avg. Office Rent/sf (2023)	$33.58	$19.40	*57.8*	■	↓
22	Avg. Indus'l Rent/sf (2023)	$10.96	$12.85	*117.3*		↓
23	Avg. Commc'l/Industrial Land Price/acre (2023)	$59,232	$145,877	*246.3*		↓

Appendix Exhibit 2.11 - Econographics Market Profile - Port St. Lucie

Data #		FL benchmark	Port St. Lucie Summary: Item	Index	Advantages	Index target
Electric Rates						
24	Commercial electricity rate (cents/kwh) (2023)	11.30	11.24	*99.5*	■	↓
25	Industrial electricity rate (cents/kwh) (2023)	9.49	8.71	*91.8*	■	↓
Part 3 - Market Access						
Market Potential						
26	% of US within 300-mile radius (2023)	7.1%	6.3%	*88.0*		↑
Retail Sales						
27	Retail sales per capita (2023)	$10,660	$8,561	*80.3*		↑
Worker Mobility						
28	Mean travel time to Work - minutes (2022)	29.0	28.5	*98.3*		↑
29	Commute outside place of residence (2022)	46.8%	49.4%	*105.6*	■	↑
30	Worked from home (2022)	15.1%	13.3%	*88.1*	■	↓
31	2 or more vehicles available (2022)	44.0%	47.0%	*106.8*	■	↑
Airport Access						
32	Travel time to nearest major airport - minutes (2023)	45.0	48.0	*106.7*		↓

Scoring Quartiles						
75.1	100.0	4th quartile - Very Competitive	**Legend**	**Total**	**16**	**Score**
50.1	75.0	3rd quartile - Competitive	*Meets criteria for* ***Advantage***		■	
25.1	**50.0**	**2nd quartile - Somewhat Competitive**	*Higher index is more favorable*		↑	**50.0**
0	25.0	1st quartile - Not Competitive	*Lower Index is more favorable*		↓	

Appendix Exhibit 2.12 - Econographics Market Profile - West Palm Beach

Data #		FL benchmark	West Palm Beach Summary			
			Item	*Index*	*Advantages*	*Index target*
Part 1 - Demographics						
Population Growth						
1	Population Change 2012-2022 %	15.15%	18.66%	*123.1*	■	↑
Age and Gender						
2	Younger Workers Age group 18-44 (2023)	33.4%	39.2%	*117.4*	■	↑
3	Mature Workers Age group 45-64 (2023)	25.7%	22.6%	*87.9*		↑
4	Median age (2023)	41.1	39.1	*95.1*	■	↓
5	Male/Female ratio (2023)	97.0	98.6	*101.6*		↓
Racial Diversity						
6	Total non-white/white ratio (2023)	1.27	2.25	*177.1*	■	↑
Language Competence						
7	% English Only Spoken at home (2022)	69.8%	66.7%	*95.6*		↑
Households and median income						
8	Avg. Size of Household (2023)	2.52	2.36	*93.7*		↑
9	Median Household income (2023)	$69,303	$71,138	*102.6*	■	↑
Educational Attainment						
10	% College Grads (2023)	44.5%	48.8%	*109.7*	■	↑
Housing						
11	Home Ownership Rate (2023)	67.2%	51.5%	*76.6*		↑
12	Median home value (2023)	$354,100	$436,600	*123.3*		↓
Cost of Living						
13	Cost of living index (2023)	101.9	101.6	*99.7*	■	↓
Quality of Life						
14	Crime index (2023)	100.0	147.0	*147.0*		↓
15	Physicians per 1K population (2022)	21.1	21.8	*103.5*	■	↑
16	Arts, leisure, tourism & hospitality empl. per 1K pop. (2022)	51.3	49.1	*95.8*		↑
Part 2 - Economics						
Labor Market Status						
17	Labor force participation rate (2022)	59.2%	66.6%	*112.5*	■	↑
Area Business Patterns						
18	Goods/Service producing industries ratio (2022)	17.4	20.0	*115.0*	■	↑
Average Hourly Wages - Goods Producing Industries						
19	Total Goods producing workers hrly wages (2022)	$24.38	$20.82	*85.4*	■	↓
Average Hourly Wages - Service Producing Industries						
20	Total Service producing workers hrly wages (2022)	$24.29	$33.17	*136.6*		↓
Real Estate - Commercial and Industrial						
21	Avg. Office Rent/sf (2023)	$33.58	$44.40	*132.2*		↓
22	Avg. Indus'l Rent/sf (2023)	$10.96	$14.76	*134.7*		↓
23	Avg. Commc'l/Industrial Land Price/acre (2023)	$57,968	$975,320	*1682.5*		↓

Appendix Exhibit 2.12 - Econographics Market Profile - West Palm Beach

Data #		FL benchmark	West Palm Beach Summary Item	Index	Advantages	Index target
Electric Rates						
24	Commercial electricity rate (cents/kwh) (2023)	11.30	11.24	*99.5*	■	↓
25	Industrial electricity rate (cents/kwh) (2023)	9.49	8.71	*91.8*	■	↓
Part 3 - Market Access						
Market Potential						
26	% of US within 300-mile radius (2023)	7.1%	6.4%	*89.6*		↑
Retail Sales						
27	Retail sales per capita (2023)	$10,660	$10,300	*96.6*		↑
Worker Mobility						
28	Mean travel time to Work - minutes (2022)	27.9	26.4	*94.6*		↑
29	Commute outside place of residence (2022)	51.3%	58.5%	*114.0*	■	↑
30	Worked from home (2022)	16.4%	15.7%	*95.7*	■	↓
31	2 or more vehicles available (2022)	44.1%	47.1%	*106.8*	■	↑
Airport Access						
32	Travel time to nearest major airport - minutes (2023)	45.0	11.0	*24.4*	■	↓

Scoring Quartiles						
75.1	100.0	4th quartile - Very Competitive	**Legend**	**Total**	**17**	**Score**
50.1	**75.0**	**3rd quartile - Competitive**	*Meets criteria for* ***Advantage***		■	
25.1	50.0	2nd quartile - Somewhat Competitive	*Higher index is more favorable*		↑	**53.1**
0	25.0	1st quartile - Not Competitive	*Lower Index is more favorable*		↓	

Appendix Exhibit 2.13- Fields of Study by Degree Awards 2022

Majors	Certificates	Rank
Health Professions and Related Programs	**1,121**	**1**
Culinary, Entertainment, and Personal Services	**463**	**2**
Engineering	**318**	**3**
Agricultural/Animal/Plant/Veterinary Science and Related Fields	180	4
Mechanic and Repair Technologies/Technicians	160	5
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	154	6
Engineering/Engineering-related Technologies/Technicians	140	7
Computer and Information Sciences and Support Services	98	8
Construction Trades	94	9
Business, Management, Marketing, and Related Support Services	84	10
Precision Production	59	11
Communications Technologies/Technicians and Support Services	26	12
Communication, Journalism, and Related Programs	22	13
Education	10	14
Public Administration and Social Service Professions	9	15
Family and Consumer Sciences/Human Sciences	8	16
Science Technologies/Technicians	8	16
Legal Professions and Studies	4	18
Total 2022 awards	**2,958**	
Number of Fields of Study	**18**	
Top Three Leading Fields of Study Subtotal	**1,902**	
Top Three Leading Fields of Study Perecentage	**64%**	

Majors	Associates	Rank
Liberal Arts and Sciences, General Studies and Humanities	**3,586**	**1**
Health Professions and Related Programs	**1,287**	**2**
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	**122**	**3**
Business, Management, Marketing, and Related Support Services	**117**	**4**
Computer and Information Sciences and Support Services	**115**	**5**
Legal Professions and Studies	35	6
Architecture and Related Services	26	7
Science Technologies/Technicians	22	8
Education	20	9
Engineering/Engineering-related Technologies/Technicians	4	10
Total 2022 awards	**5,334**	
Number of Fields of Study	**10**	
Top Three Leading Fields of Study Subtotal	**4,995**	
Top Three Leading Fields of Study Perecentage	**94%**	

Majors	Bachelors	Rank

Appendix Exhibit 2.13- Fields of Study by Degree Awards 2022

Business, Management, Marketing, and Related Support Services	**967**	**1**
Health Professions and Related Programs	**743**	**2**
Education	**306**	**3**
Multi/Interdisciplinary Studies	305	4
Psychology	298	5
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	254	6
Biological and Biomedical Sciences	189	7
Communication, Journalism, and Related Programs	180	8
Engineering	158	9
Social Sciences	98	10
Natural Resources and Conservation	82	11
Visual and Performing Arts	58	12
Parks, Recreation, Leisure, Fitness, and Kinesiology	56	13
Public Administration and Social Service Professions	54	14
English Language and Literature/Letters	48	15
Legal Professions and Studies	48	15
History	27	17
Philosophy and Religious Studies	22	18
Theology and Religious Vocations	19	19
Computer and Information Sciences and Support Services	13	20
Mathematics and Statistics	12	21
Physical Sciences	9	22
Liberal Arts and Sciences, General Studies and Humanities	8	23
Engineering/Engineering-related Technologies/Technicians	3	24
Foreign Languages, Literatures, and Linguistics	2	25
Total 2022 awards	**3,959**	
Number of Fields of Study	**25**	
Top Three Leading Fields of Study Subtotal	**2,016**	
Top Three Leading Fields of Study Perecentage	**51%**	

Appendix Exhibit 2.13- Fields of Study by Degree Awards 2022

Majors	Masters	Rank
Education	**179**	**1**
Business, Management, Marketing, and Related Support Services	**149**	**2**
Health Professions and Related Programs	**80**	**3**
Public Administration and Social Service Professions	52	4
Natural Resources and Conservation	12	5
Homeland Security, Law Enforcement, Firefighting and Related Protective Services	11	6
Legal Professions and Studies	10	7
English Language and Literature/Letters	9	8
Theology and Religious Vocations	8	9
Engineering	6	10
History	4	11
Mathematics and Statistics	2	12
Total 2022 awards	**522**	
Number of Fields of Study	**12**	
Top Three Leading Fields of Study Subtotal	**408**	
Top Three Leading Fields of Study Perecentage	**78%**	

Majors	Doctorate	Rank
Law	**75**	**1**
Health Professions and Related Programs	**35**	**2**
Education	**6**	**3**
Theology and Religious Vocations	2	4
Total 2022 awards	**118**	
Number of Fields of Study	4	
Top Three Leading Fields of Study Subtotal	**116**	
Top Three Leading Fields of Study Perecentage	**98%**	

Source:College Navigator – National Center for Education Statistics

Economic Development Strategic Plan - RCM2342AS

Task 3 Report -- Appendices

prepared for:

City of Cape Coral Office of Economic and Business Development

Cape Coral City Hall
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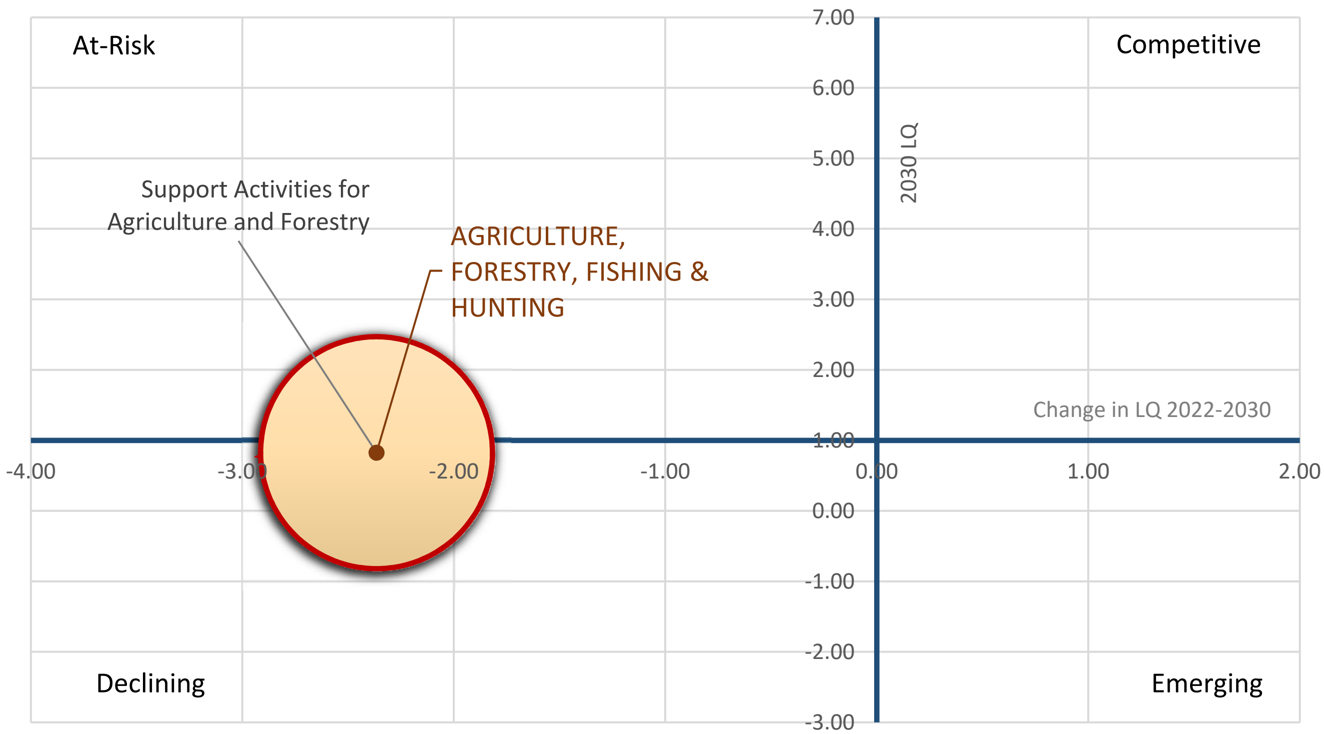
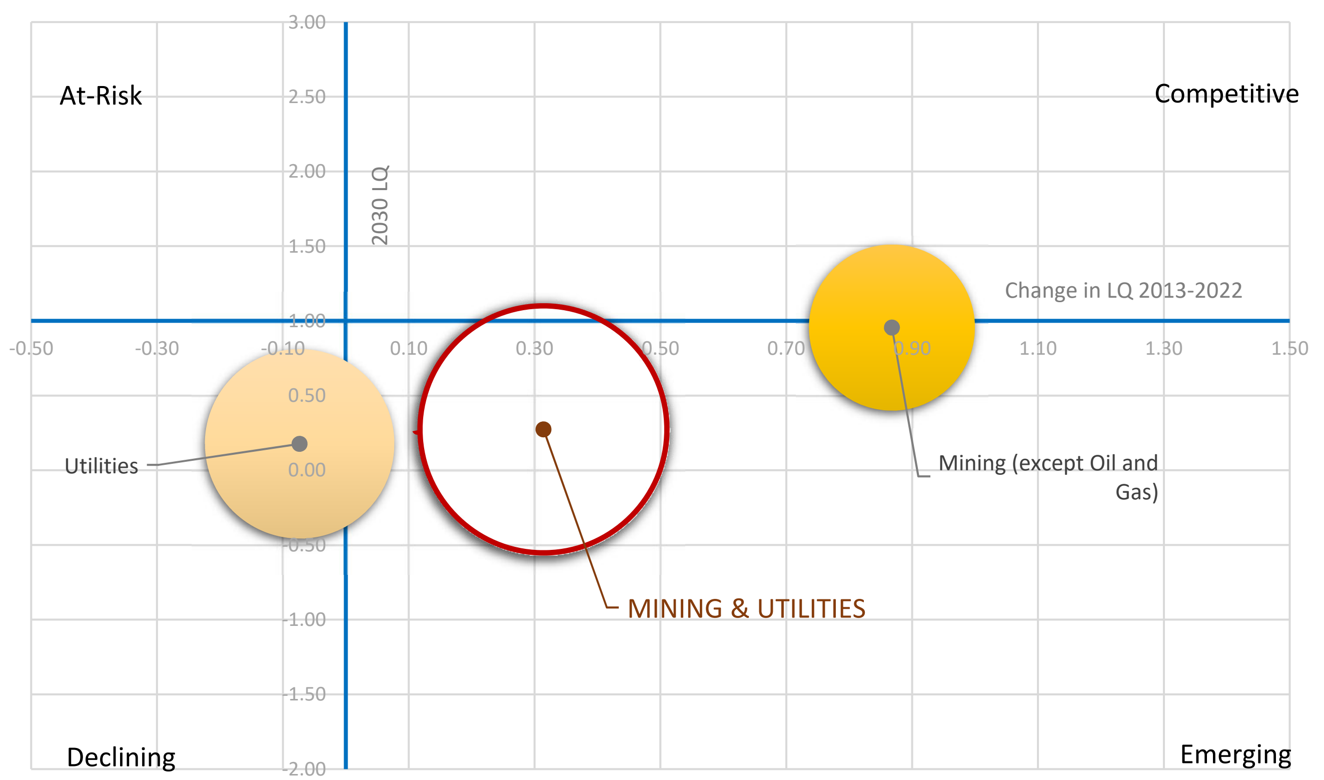
February 9, 2024

Appendix Exhibit 3.1 - City of Cape Coral Location Quotient Chart - AFFH



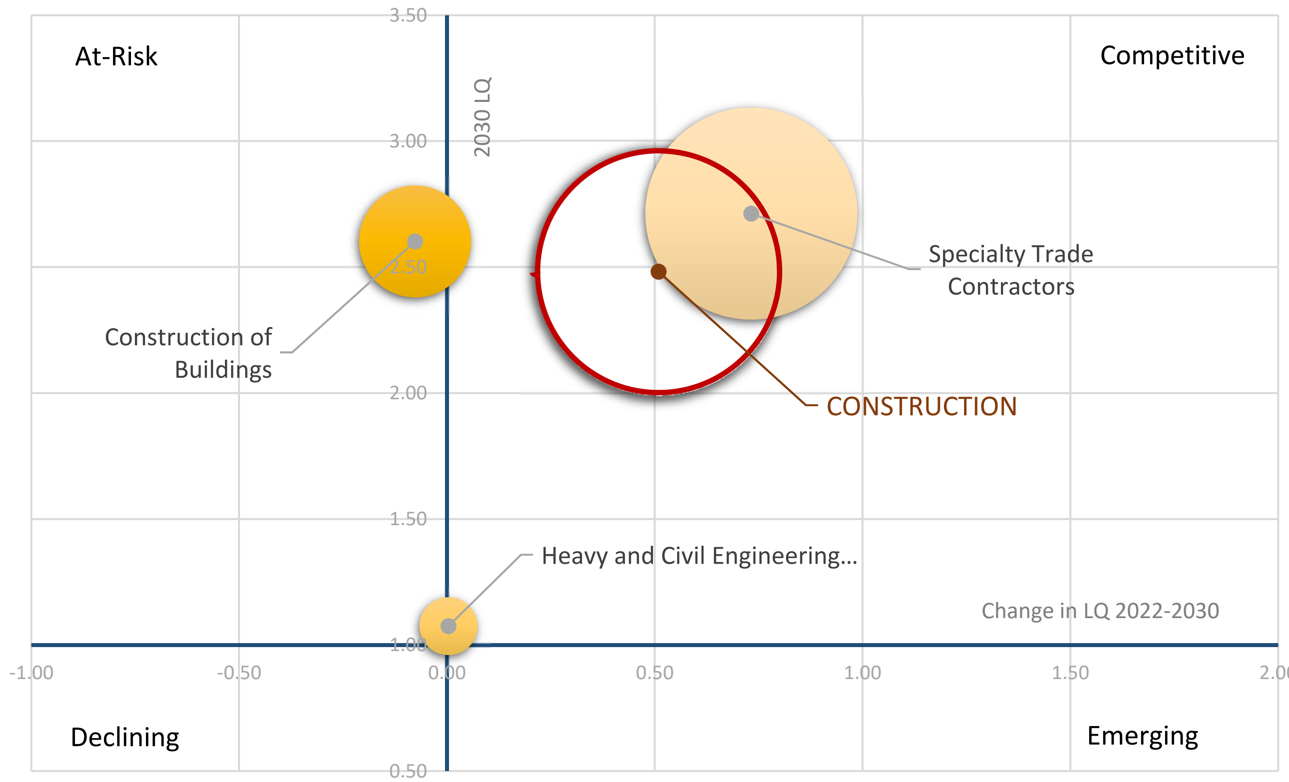
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
AGRICULTURE, FORESTRY, FISHING & HUNTING	50	-2.37	0.83	DEC	-1.47	
Support Activities for Agriculture and Forestry	50	-2.37	0.83	DEC	-1.47	
Total	50	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	□

Appendix Exhibit 3.2 - City of Cape Coral Location Quotient Chart - M&U



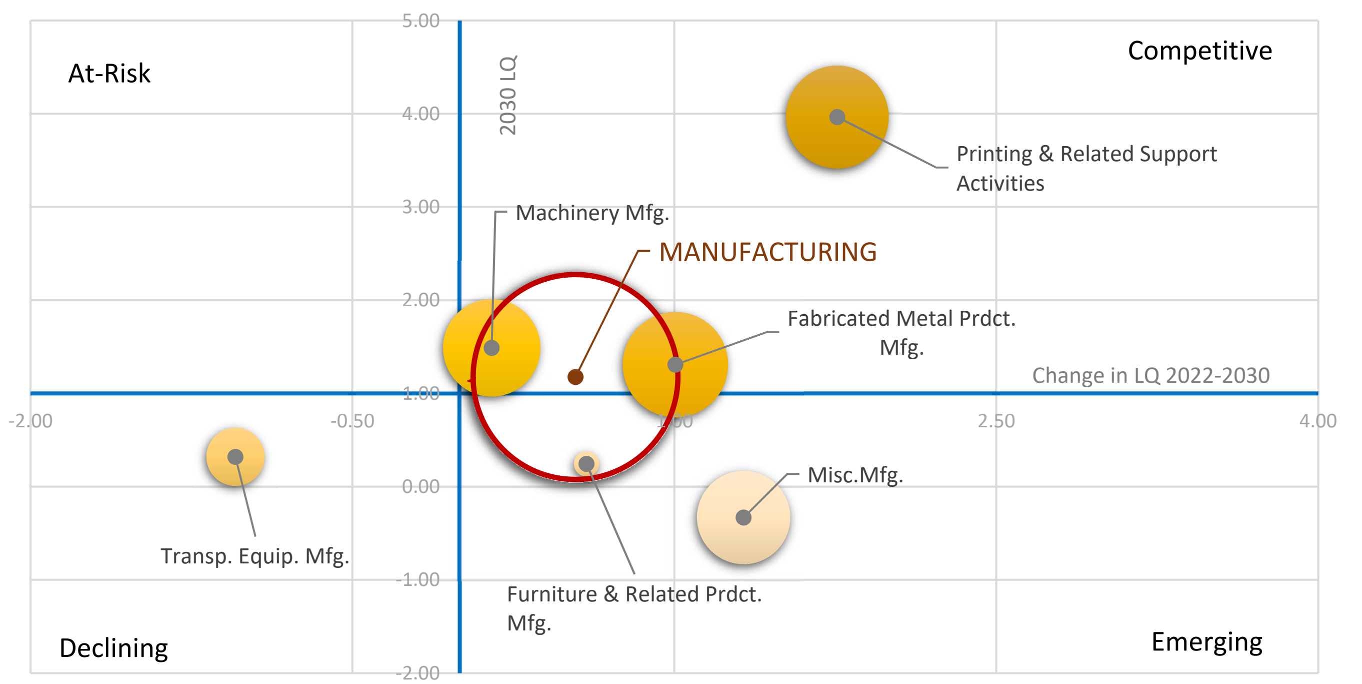
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
MINING & UTILITIES	36	0.31	0.27	EMG	0.06	
Mining (except Oil and Gas)	16	0.87	0.96	EMG	0.11	
Utilities	21	-0.07	0.18	DEC	-0.01	
Total	36	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	□

Appendix Exhibit 3.3 - City of Cape Coral Location Quotient Chart - CONST



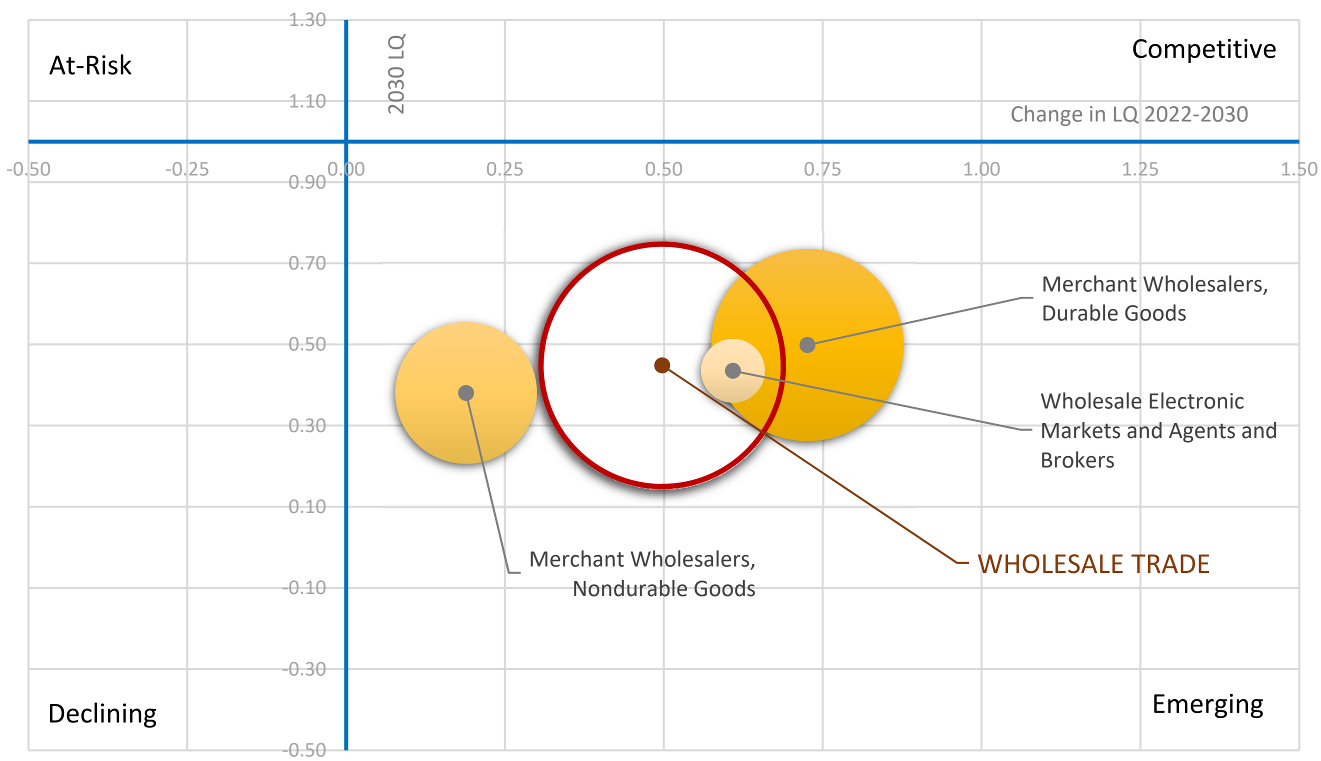
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
CONSTRUCTION	8,001	0.51	2.48	COM	53.75	■
Construction of Buildings	1,649	-0.08	2.60	A-R	-1.90	
Heavy and Civil Engineering Construction	442	0.00	1.08	COM	0.02	
Specialty Trade Contractors	5,910	0.73	2.71	COM	57.58	■
Total	8,001	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	□

Appendix Exhibit 3.4 - City of Cape Coral Location Quotient Chart - MFG



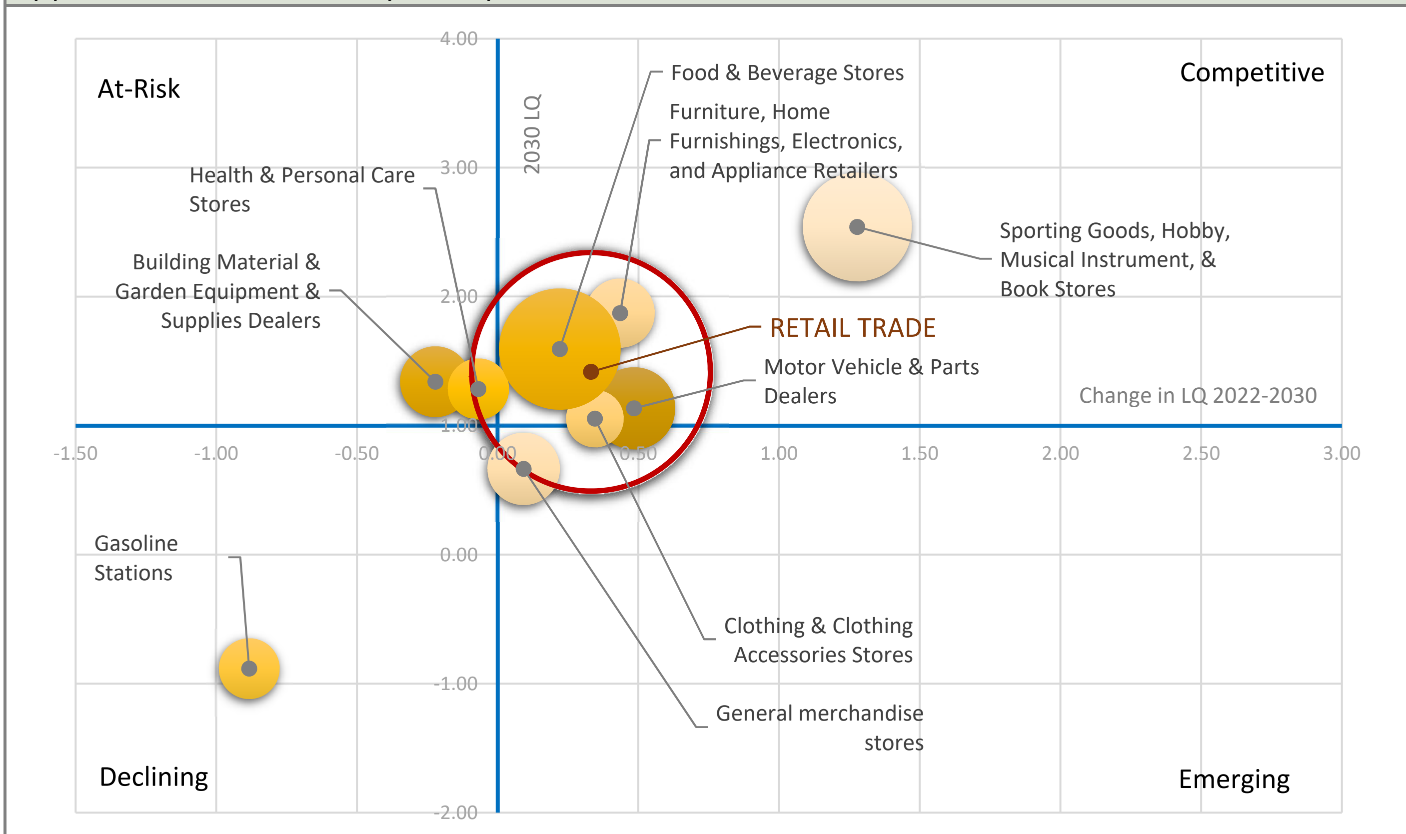
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
MANUFACTURING	1,167	0.54	1.18	COM	6.17	■
Printing & Related Support Activities	281	1.76	3.96	COM	8.36	■
Fabricated Metal Prdct. Mfg.	295	1.00	1.31	COM	2.74	■
Machinery Mfg.	252	0.15	1.49	COM	0.41	
Transp. Equip. Mfg.	90	-1.05	0.32	DEC	-0.54	
Furniture & Related Prdct. Mfg.	17	0.59	0.24	EMG	0.05	
Misc.Mfg.	232	-0.33	1.32	A-R	-0.89	
Total	**886**	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	□

Appendix Exhibit 3.5 - City of Cape Coral Location Quotient Chart - WT



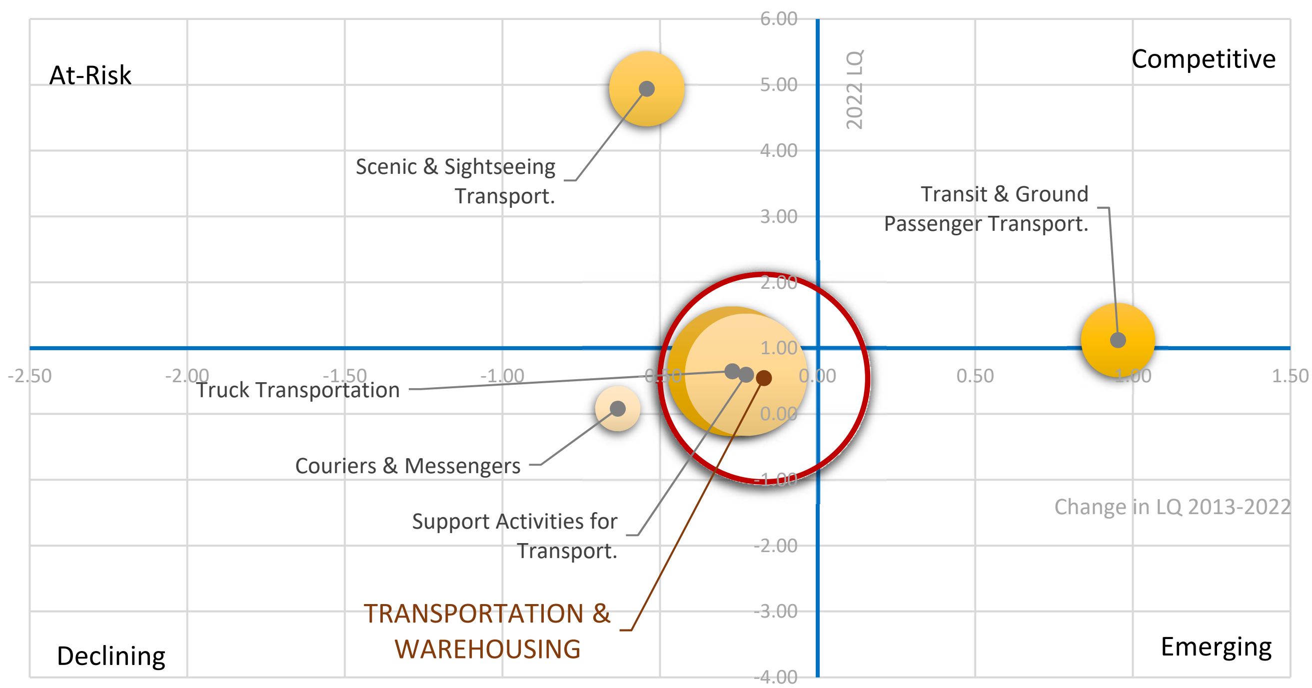
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
WHOLESALE TRADE	824	0.50	0.45	EMG	2.45	■
Merchant Wholesalers, Durable Goods	498	0.73	0.50	EMG	2.24	■
Merchant Wholesalers, Nondurable Goods	271	0.19	0.38	EMG	0.29	
Wholesale Electronic Markets and Agents and Brokers	55	0.61	0.44	EMG	0.20	
Total	**824**	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	□

Appendix Exhibit 3.6 - City of Cape Coral Location Quotient Chart - RT



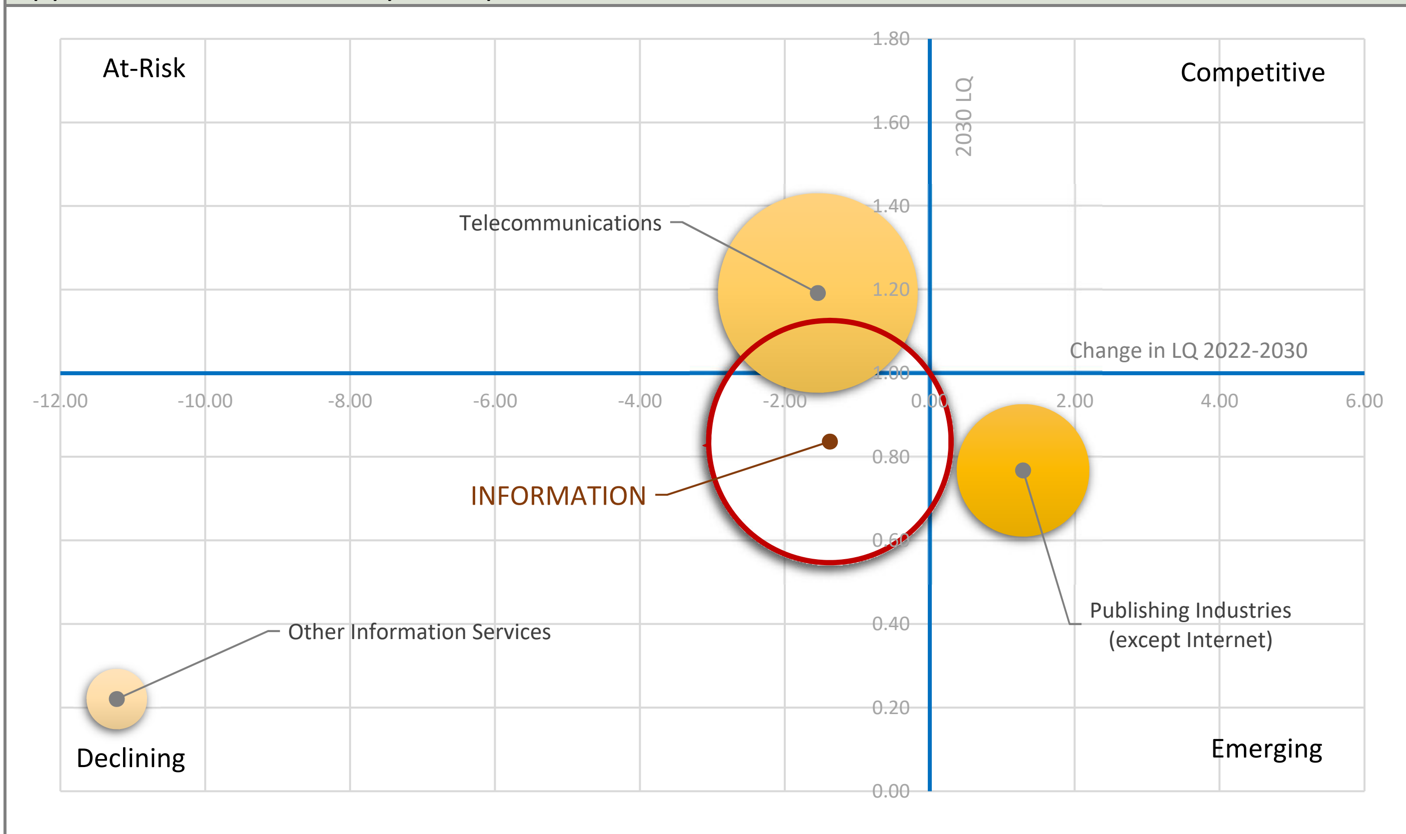
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
RETAIL TRADE	7,881	0.33	1.42	COM	29.15	■
Motor Vehicle & Parts Dealers	899	0.48	1.13	COM	4.12	■
Building Material & Garden Equipment & Supplies Dealers	668	-0.22	1.34	A-R	-1.65	
Food & Beverage Stores	1,964	0.22	1.59	COM	5.04	■
Health & Personal Care Stores	499	-0.07	1.28	A-R	-0.39	
Gasoline Stations	492	-0.88	2.28	A-R	-7.27	□
Clothing & Clothing Accessories Stores	441	0.35	1.05	COM	1.51	■
Furniture, Home Furnishings, Electronics, and Appliance Retailers	639	0.44	1.87	COM	3.63	■
General merchandise stores	699	0.09	0.67	EMG	0.50	
Sporting Goods, Hobby, Musical Instrument, & Book Stores	1,580	1.28	2.54	COM	27.85	■
Total	**7,881**	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	□

Appendix Exhibit 3.7 - City of Cape Coral Location Quotient Chart -T&W



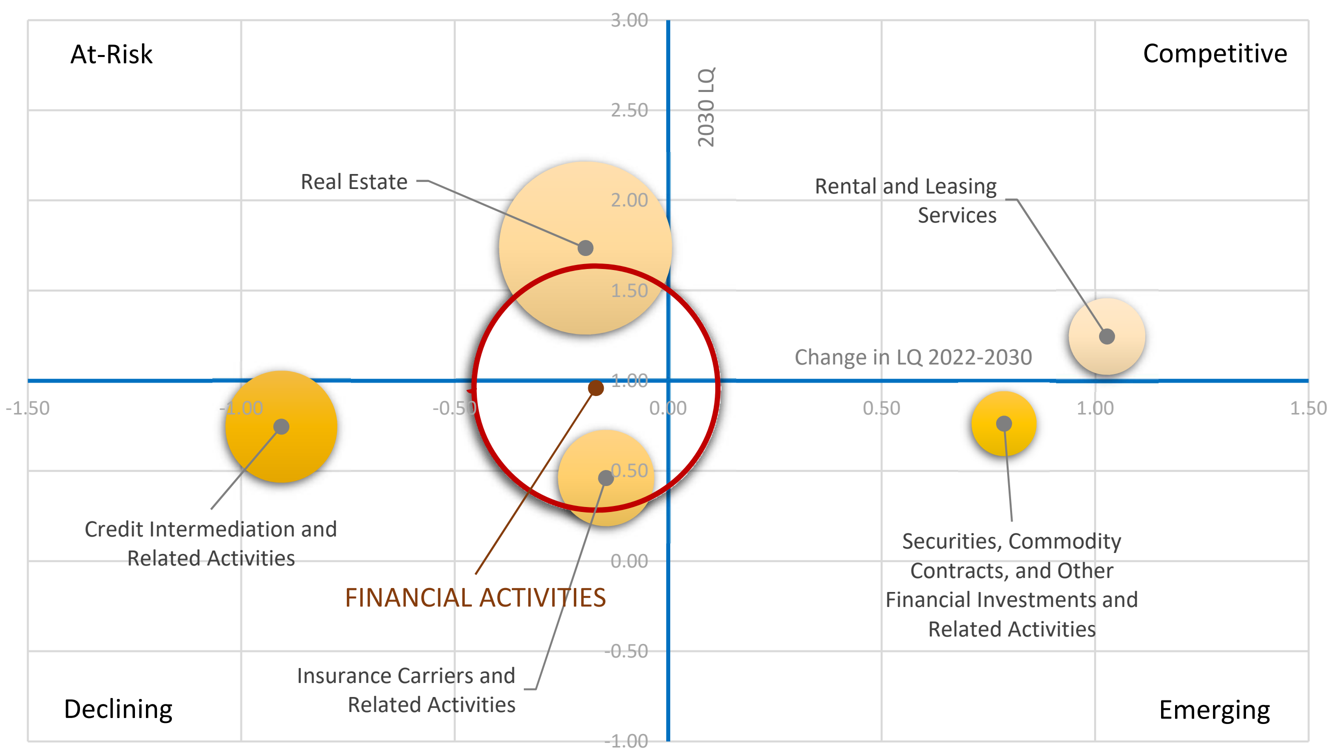
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
TRANSPORTATION & WAREHOUSING	614	-0.17	0.55	DEC	-0.74	
Truck Transportation	230	-0.27	0.65	DEC	-0.48	
Transit & Ground Passenger Transport.	75	0.95	1.12	COM	0.63	
Scenic & Sightseeing Transport.	77	-0.54	4.94	A-R	-0.92	
Support Activities for Transport.	204	-0.23	0.60	DEC	-0.35	
Couriers & Messengers	28	-0.63	0.08	DEC	-0.05	
Total	**614**	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	□

Appendix Exhibit 3.8 - City of Cape Coral Location Quotient Chart - INFO



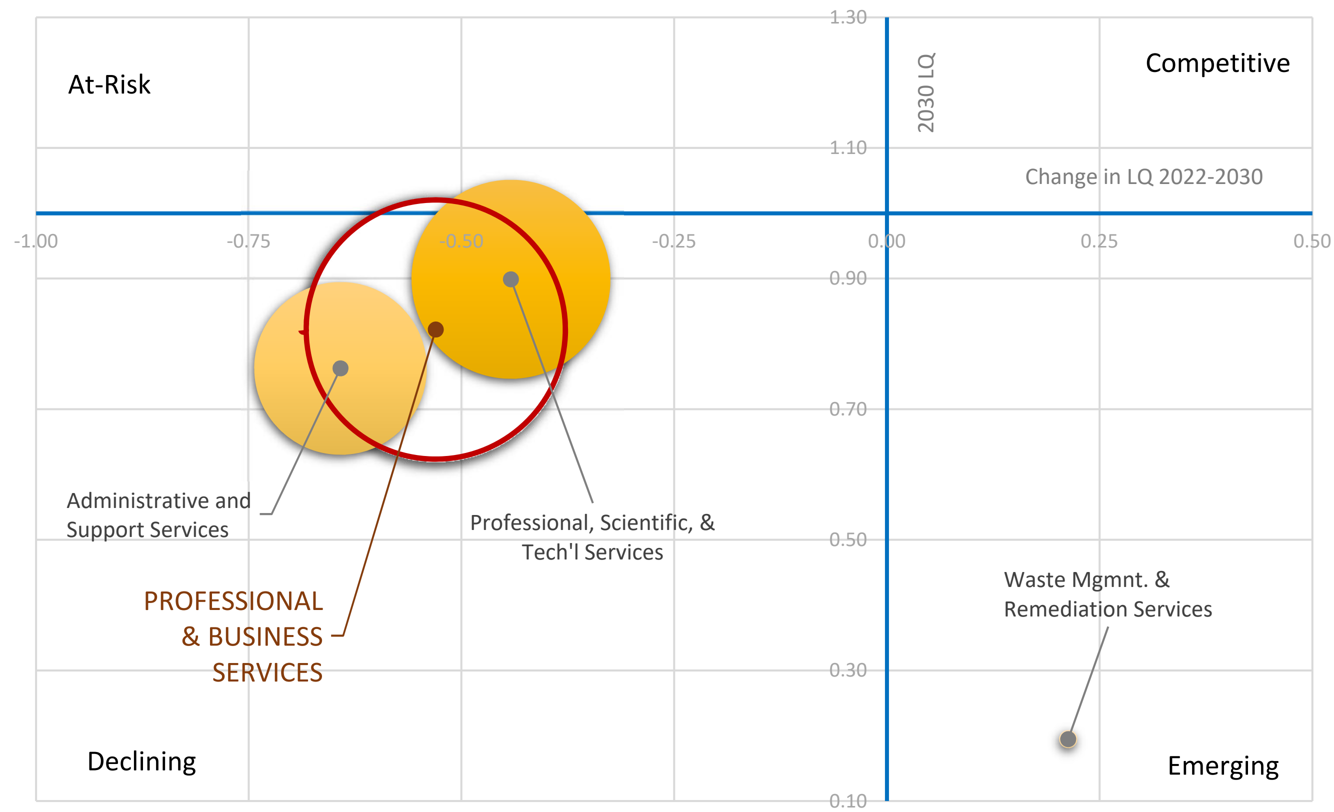
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
INFORMATION	431	-1.38	0.84	DEC	-6.322	☐
Publishing Industries (except Internet)	124	1.29	0.77	EMG	1.275	■
Telecommunications	281	-1.55	1.19	A-R	-5.548	☐
Other Information Services	26	-11.22	0.22	DEC	-2.290	
Total	**862**	**Tier 1 Target Industries Median**			**1.224**	■
		Tier 2 Target Industries Median			**-2.290**	☐

Appendix Exhibit 3.9 - City of Cape Coral Location Quotient Chart - FA



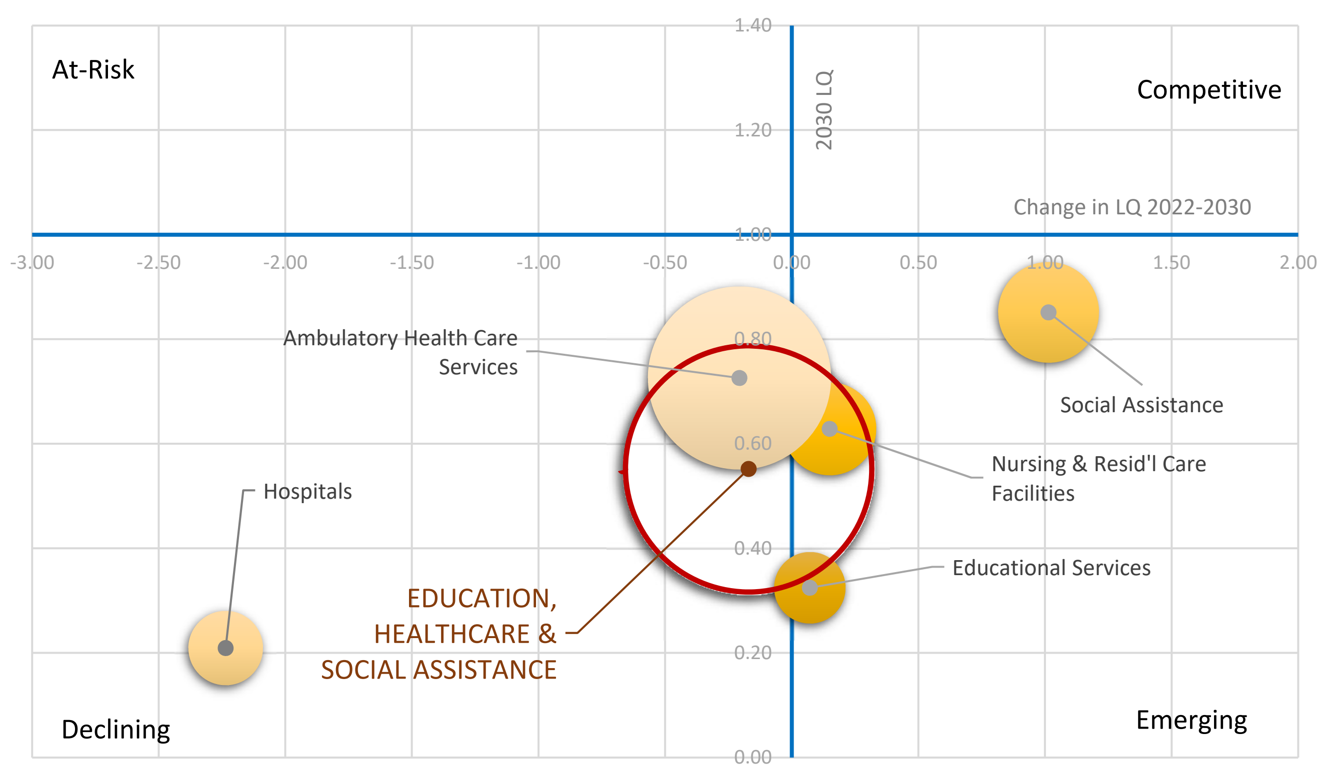
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
FINANCIAL ACTIVITIES	3,209	-0.17	0.96	DEC	-4.92	☐
Credit Intermediation and Related Activities	650	-0.91	0.75	DEC	-5.66	☐
Securities, Commodity Contracts, and Other Financial Investments and Related Activities	219	0.79	0.76	EMG	1.35	■
Insurance Carriers and Related Activities	482	-0.15	0.46	DEC	-0.45	
Real Estate	1,553	-0.19	1.74	A-R	-3.57	☐
Rental and Leasing Services	305	1.03	1.25	COM	2.54	■
Total	**3,209**	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	☐

Appendix Exhibit 3.10 - City of Cape Coral Location Quotient Chart - P&BS



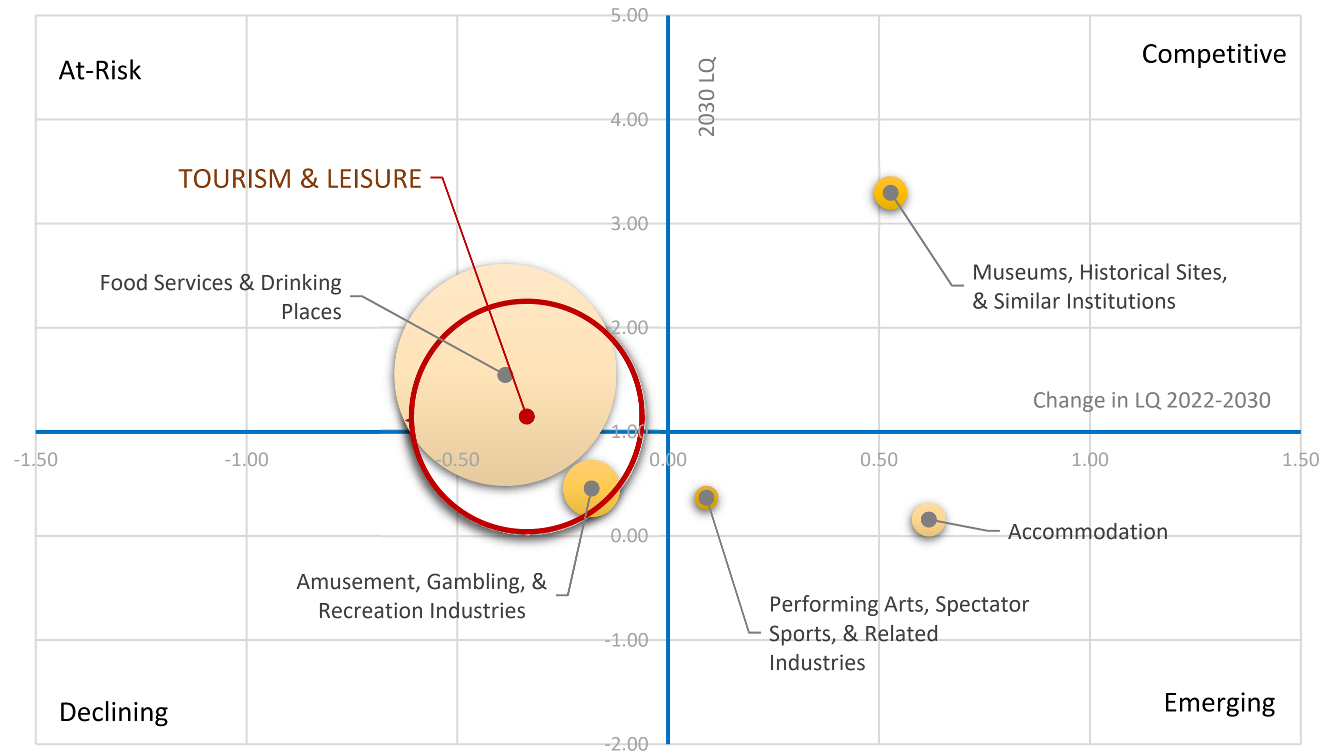
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
PROFESSIONAL & BUSINESS SERVICES	6,334	-0.53	0.82	DEC	-28.32	☐
Professional, Scientific, & Tech'l Services	3,595	-0.44	0.90	DEC	-13.29	☐
Administrative and Support Services	2,709	-0.64	0.76	DEC	-15.17	☐
Waste Mgmnt. & Remediation Services	30	0.21	0.19	EMG	0.03	
Total	**6,334**	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	☐

Appendix Exhibit 3.11 - City of Cape Coral Location Quotient Chart - EHCSA



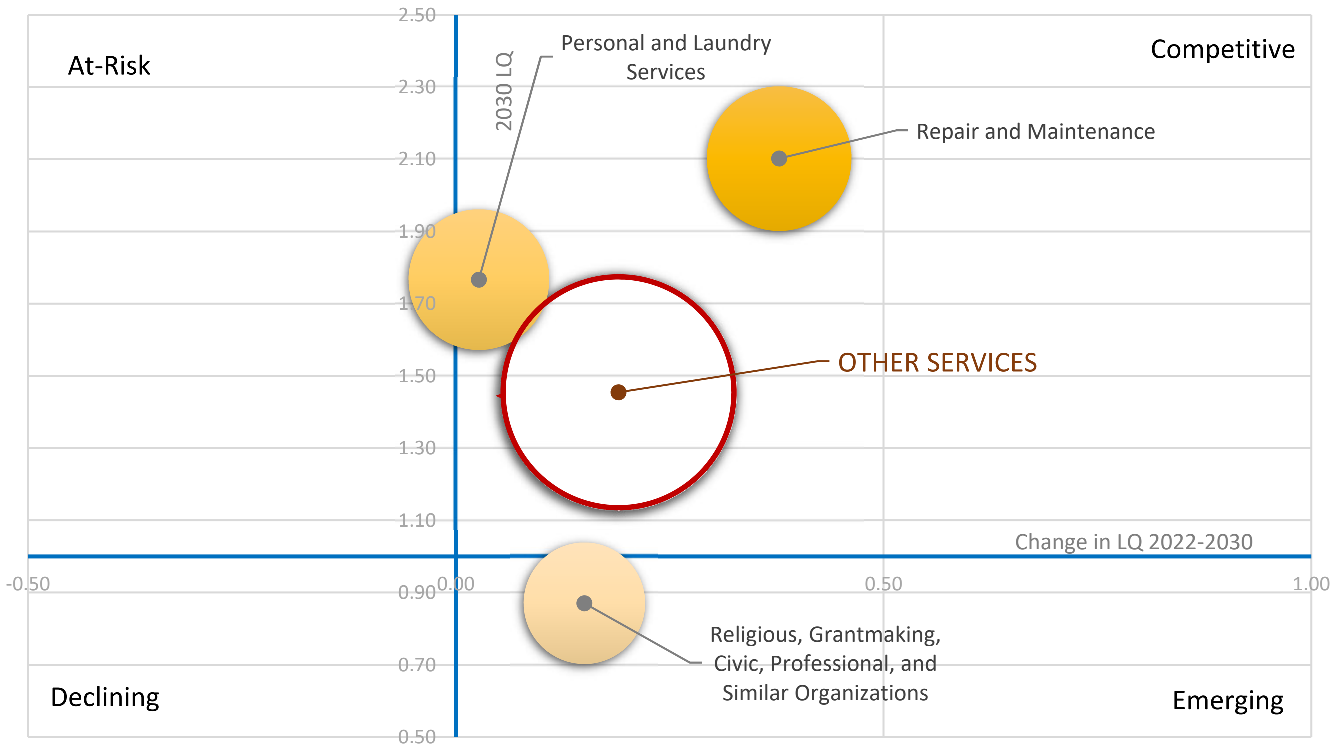
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
EDUCATION, HEALTHCARE & SOCIAL ASSISTANCE	4,326	-0.17	0.55	DEC	-4.84	□
Educational Services	351	0.07	0.32	EMG	0.12	
Ambulatory Health Care Services	2,301	-0.21	0.73	DEC	-3.60	□
Hospitals	381	-2.24	0.21	DEC	-4.48	□
Nursing & Resid'l Care Facilities	595	0.15	0.63	EMG	0.60	
Social Assistance	698	1.01	0.85	EMG	5.03	■
Total	**4,326**			**Tier 1 Target Industries Median**	**1.22**	■
				Tier 2 Target Industries Median	**-2.29**	□

Appendix Exhibit 3.12 - City of Cape Coral Location Quotient Chart - T&L



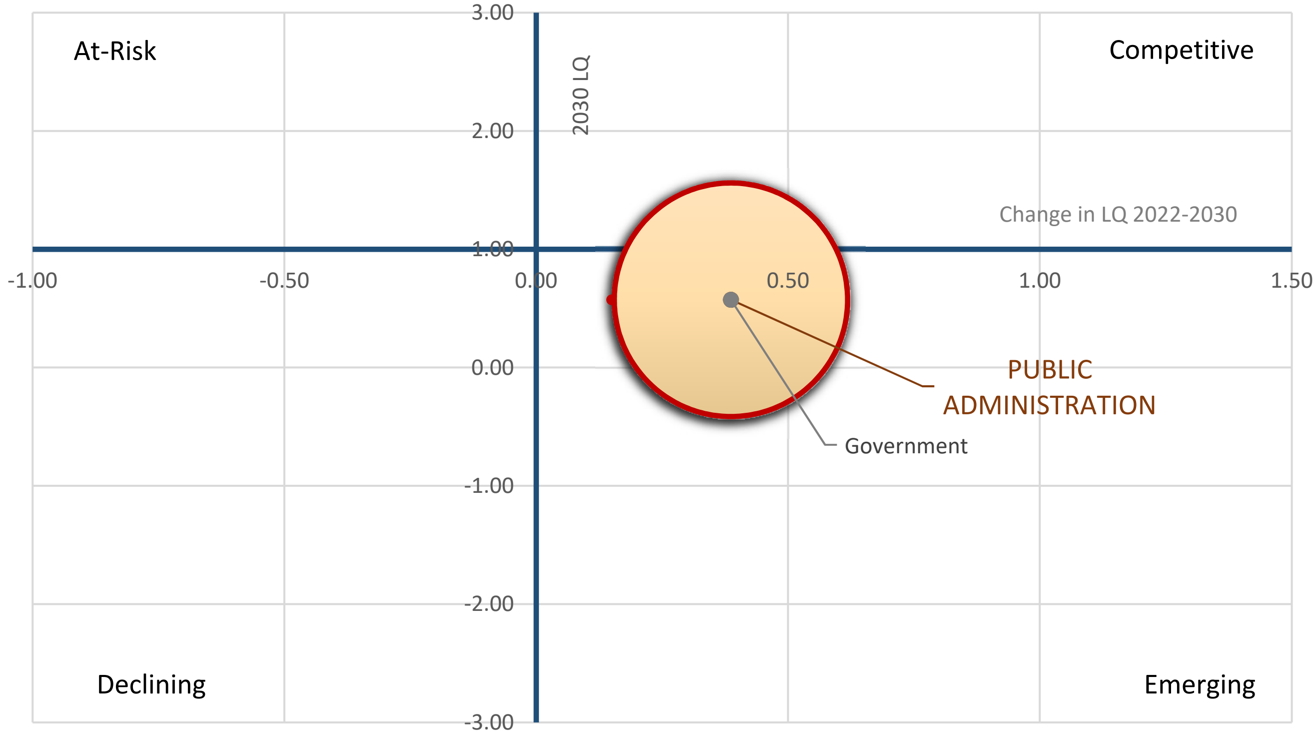
Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
TOURISM & LEISURE	7,836	-0.34	1.15	A-R	-26.47	☐
Performing Arts, Spectator Sports, & Related Industries	81	0.09	0.37	EMG	0.04	
Museums, Historical Sites, & Similar Institutions	159	0.53	3.30	COM	1.17	
Amusement, Gambling, & Recreation Industries	465	-0.18	0.46	DEC	-0.54	
Accommodation	164	0.62	0.16	EMG	0.32	
Food Services & Drinking Places	6,967	-0.39	1.55	A-R	-31.65	☐
Total	**7,836**			**Tier 1 Target Industries Median**	**1.22**	■
				Tier 2 Target Industries Median	**-2.29**	☐

Appendix Exhibit 3.13 - City of Cape Coral Location Quotient Chart - OS



Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
OTHER SERVICES	2,749	0.19	1.45	COM	5.56	■
Repair and Maintenance	1,036	0.38	2.10	COM	4.87	■
Personal and Laundry Services	980	0.03	1.77	COM	0.31	
Religious, Grantmaking, Civic, Professional, and Similar Organizations	733	0.15	0.87	EMG	0.95	
Total	**2,749**	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	□

Appendix Exhibit 3.14 - City of Cape Coral Location Quotient Chart - PA



Description	Cape Coral 2030 Empl	CC 2022-2030 LQ % ARC	Cape Coral 2030 LQ	LQ Quadrant	LQI Factor	Target Industry
PUBLIC ADMINISTRATION	3,235	0.39	0.57	EMG	8.50	■
Government	3,235	0.39	0.57	EMG	8.50	■
Total	3,235	**Tier 1 Target Industries Median**			**1.22**	■
		Tier 2 Target Industries Median			**-2.29**	□

Appendix Table 3.15 – Cape Coral Cluster Mapping by 4-digit Target Industries

NAICS	Industry	Automotive	Business Services	Computers & electronic equip.	Construction services. & matr'ls.	Consumer Products	Consumer Services	Energy & Utilities	Financial Services	Food & beverages	Health Care & Social Services	HQ & Management Operations	Industrial products	Information & Media	Leisure & Tourism	Life Sciences	Metals & Mining	Public Administration	Real Estate	Retail - Clothing & General Merchandise	Telecom srvs. & equip.
3327	Machine shops; turned product; and screw, nut, and bolt manufacturing												■								
3328	Coating, engraving, heat treating, and allied activities												■								
3329	Other fabricated metal product manufacturing				■								■								
4231	Motor vehicle and motor vehicle parts and supplies merchant wholesalers	■																			
4233	Lumber and other construction materials merchant wholesalers																				
4234	Professional and commercial equipment and supplies merchant wholesalers					■															
4235	Metal and mineral (except petroleum) merchant wholesalers																■				
4236	Household appliances and electrical and electronic goods merchant wholesalers					■														■	
4237	Hardware, & plumbing & heating equipment & supplies merchant wholesalers					■															
4238	Machinery, equipment, and supplies merchant wholesalers												■								
4239	Miscellaneous durable goods merchant wholesalers					■														■	
4411	Automobile dealers	■																			

NAICS	Industry	Automotive	Business Services	Computers & electronic equip.	Construction services. & matr'ls.	Consumer Products	Consumer Services	Energy & Utilities	Financial Services	Food & beverages	Health Care & Social Services	HQ & Management Operations	Industrial products	Information & Media	Leisure & Tourism	Life Sciences	Metals & Mining	Public Administration	Real Estate	Retail - Clothing & General Merchandise	Telecom srvs. & equip.
4452	Specialty food retailers									■											
4572	Fuel dealers							■													
4581	Clothing and clothing accessories retailers																			■	
4582	Shoe retailers																			■	
4591	Sporting goods, hobby, and musical instrument retailers																			■	
4592	Book retailers and news dealers																			■	
4593	Florists																			■	
4595	Used merchandise retailers																			■	
5121	Motion picture and video industries													■							
5122	Sound recording industries													■							
5132	Software publishers													■							
5161	Radio and television broadcasting stations													■							
5162	Media streaming srvcs., social networks, & other media networks providers													■							
5174	Satellite telecommunications																				■
5178	All other telecommunications																				■
5221	Depository credit intermediation								■												
5222	Nondepository credit intermediation								■												
5223	Activities related to credit intermediation								■												
5231	Securities and commodity contracts intermediation and brokerage								■												
5311	Lessors of real estate																		■		

NAICS	Industry	Automotive	Business Services	Computers & electronic equip.	Construction services. & matr'ls.	Consumer Products	Consumer Services	Energy & Utilities	Financial Services	Food & beverages	Health Care & Social Services	HQ & Management Operations	Industrial products	Information & Media	Leisure & Tourism	Life Sciences	Metals & Mining	Public Administration	Real Estate	Retail - Clothing & General Merchandise	Telecom srvs. & equip.
5313	Activities related to real estate																		■		
5321	Automotive equipment rental and leasing						■														
5411	Legal services		■																		
5413	Architectural, engineering, and related services				■																
5415	Computer systems design and related services			■																	
5416	Management, scientific, and technical consulting services		■																		
5417	Scientific research and development services															■					
5418	Advertising, public relations, and related services		■											■							
5611	Office administrative services											■									
5612	Facilities support services											■									
5613	Employment services		■																		
5614	Business support services		■																		
5616	Investigation and security services		■																		
5619	Other support services		■																		
6211	Offices of physicians										■										
6212	Offices of dentists										■										
6213	Offices of other health practitioners										■										
6214	Outpatient care centers										■										
6215	Medical and diagnostic laboratories										■					■					
6216	Home health care services										■										
6219	Other ambulatory health care services										■										

NAICS	Industry	Automotive	Business Services	Computers & electronic equip.	Construction services. & matr'ls.	Consumer Products	Consumer Services	Energy & Utilities	Financial Services	Food & beverages	Health Care & Social Services	HQ & Management Operations	Industrial products	Information & Media	Leisure & Tourism	Life Sciences	Metals & Mining	Public Administration	Real Estate	Retail - Clothing & General Merchandise	Telecom srvs. & equip.
6221	General medical and surgical hospitals										■										
6222	Psychiatric and substance abuse hospitals										■										
6223	Specialty (except psychiatric and substance abuse) hospitals										■										
6241	Individual and family services										■										
6242	Community food and housing, and emergency and other relief services										■										
6243	Vocational rehabilitation services										■										
7223	Special food services														■						
8112	Electronic and precision equipment repair and maintenance			■																	
8113	Commercial and industrial machinery and equipment repair and maintenance												■								
9100	Federal Government																	■			
9200	State Government																	■			
9300	Local Government																	■			
	Industry tally	**2**	**7**	**2**	**7**	**2**	**2**	**4**	**1**	**1**	**4**	**1**	**13**	**2**	**5**	**6**	**1**	**2**	**1**	**3**	**2**
	# of industries	**65**																			

Page Not Used.

Economic Development Strategic Plan - RCM2342AS

Task 4 Report – Appendices

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City of Cape Coral Office of Economic and Business Development.

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February 24, 2024

Appendix Table 4.1 - Comparison of Economic Balance Ratios								
	Cape Coral (Lee County)	Ft. Lauderdale (Broward County)	Orlando (Orange County)	Palm Bay (Brevard County)	Pompano Beach (Broward County)	Port St. Lucie (St. Lucie County)	West Palm (Palm Beach County)	State of Florida
2019 GDP $ million	$33,089.3	$111,228.6	$101,440.6	$26,348.4	$111,228.6	$9,712.9	$87,095.1	$1,079,271.0
2022 GDP $ million	$37,490.0	$124,843.5	$115,012.9	$30,082.1	$124,843.5	$11,200.1	$100,113.8	$1,218,430.2
2019 Pop. (County or State)	770,577	1,952,778	1,393,452	601,942	1,952,778	328,297	1,496,770	21,477,737
2022 Pop. (County or State)	822,453	1,947,026	1,452,726	630,693	1,947,026	358,704	1,518,477	22,244,823
2019 GDP Per Capita (County or State)	$42,941	$56,959	$72,798	$43,772	$56,959	$29,586	$58,189	$50,251
2022 GDP Per Capita (County or State)	$45,583	$64,120	$79,170	$47,697	$64,120	$31,224	$65,930	$54,774
Per Capita GDP Annual Growth 2019-2022 (County or State)	**2.01%**	**4.03%**	**2.84%**	**2.90%**	**4.03%**	**1.81%**	**4.25%**	**2.91%**
2019 Pop. (City or State)	194,504	182,432	287,435	115,560	112,122	201,858	111,952	21,477,737
2022 Pop. (City or State)	216,984	183,156	316,086	129,246	112,308	231,804	120,922	22,244,823
Pop. Growth Annual Growth Rate 2019-2022 (City or State)	**3.71%**	**0.13%**	**3.22%**	**3.80%**	**0.06%**	**4.72%**	**2.60%**	**1.18%**
Economic Balance Ratio	**0.54**	**30.48**	**0.88**	**0.76**	**72.85**	**0.38**	**1.63**	**2.48**

Fast Track Permitting

Loudon County, VA[1]

Fast Track is available for targeted industries including information communication technology, federal government contracting agencies, aerospace and airport supportive businesses, and projects supporting those industry groups. Other commercial projects meeting the criteria may also be considered.

- Dedicated Project Manager: A project manager from Economic Development will be assigned as a main contact and will facilitate movement through the county development process.

- Top of the List: County reviewing agencies will move the project to the head of review lines for the entire development review process

- Special Review Team: Representatives from county review agencies will be identified by the Department of Economic Development project manager and work as a team to ensure consistency and good communication, from project start to completion.

- Aggressive Timelines: The county project manager works with the applicant to establish a review process that meets agreed upon timelines.

Montgomery County, MD[2]

The Commercial Fast Track permit process is a quicker plan review service for small-scale interior alterations of existing commercial buildings. While standard commercial building permit applications can take four weeks to complete the first set of reviews, a complete and compliant Commercial Fast Track permit application will receive comments, or be ready for permit issuance, within 3 business days from initial intake or processing of the permit application.

If the plans submitted meet the Commercial Fast Track guidelines, and are compliant with all applicable codes, you will be able to obtain an approval. If the plans cannot be approved completely, they will be returned to the applicant with partial approvals and, if applicable, notes

[1] Loudon County, VA; https://biz.loudoun.gov/fast-track-process/#:~:text=The%20Fast%2DTrack%20Commercial%20Incentive,a%20central%20point%20of%20contact.
[2] Montgomery County, MD; https://www.montgomerycountymd.gov/DPS/Process/combuild/commercial-fasttrack.html

on what needs to be corrected via our ePlans system. (Note: construction is not permitted to begin until all reviews are approved the permit has been issued.)

Commercial Fast Track permits use the same fee schedule as standard commercial interior alteration building permits and are based on the value of construction for the project. There is no additional fee to use the Commercial Fast Track process. Further, there is no construction cost documentation required for review of the valuation, as would be for a standard interior alteration commercial building permit.

The applicant should provide an estimate of the value of the project which includes labor and materials for all disciplines – including mechanical, electrical,and plumbing work. Construction cost documentation is not required for the project valuation, as would be for a standard interior alteration commercial building permit. There is an initial filing fee at plan submittal, and this filing feewill be deducted from the final permit fee which is collected just prior to permit issuance.

The Commercial Fast Track permit process is available for projects involving small-scale interior alterations of existing commercial buildings. Projects in the following IBC use groups qualify for the Commercial Fast Track permit process, except as noted:

<u>Business Occupancies (IBC "B" Use)</u>

Exceptions: Alterations on more than one floor.

<u>Medical facilities or offices, to include dental, psychiatric, nursing, obstetrical, or surgical care.Dry cleaning facilities.</u>

Business occupancies that are part of a mixed use space (IBC non-separated mixed use).

<u>Mercantile Occupancies (IBC "M" Use)</u>

Exceptions: Alterations on more than one floor.

<u>Mercantile occupancies that are part of a mixed use space (IBC non-separated mixed use).</u>

Fire Damage Repair (All IBC Use Groups, up to 25% of the value of the structure)

Exceptions: Projects that involve the repair of fire damaged structural components

Projects that alter the structure from its original pre-fire condition.

Empire State Economic Development, NY – Shovel-Ready Grant Program[3]

Under New York's FAST NY Shovel-Ready Grant Program, Empire State Development will provide up to $200 million in grants to prepare and develop sites statewide to jumpstart New York's shovel-readiness and increase its attractiveness to large employers, including high-tech manufacturing, particularly semiconductor manufacturing, interstate distribution and logistics businesses. The program will help diversify New York State's economy while propelling new investments for businesses, communities and job creation.

Track A - FAST NY Shovel-Ready Certification

This no-cost designation by ESD for site-marketing purposes establishes that the applicant has worked proactively with New York State (the "State") to address all major permitting issues prior to a business expressing interest in the location.

Track B - FAST NY Pre-Development Grants

Working capital grants of up to $500,000 per site will be awarded to fund the cost of necessary pre-development site planning and reviews for future shovel-ready sites.

Grants will fund necessary costs to assist grantees in completing pre-development activities, such as those required for FAST NY Shovel-Ready Certification.

Track C - FAST NY Infrastructure Improvements

Capital grants will be awarded to improve the shovel-readiness of existing, mature sites by funding infrastructure improvements such as water, sewer, transportation, electricity, gas and other capital-eligible site improvement costs.

Competitive grant awards will be available to sites that have substantially met the requirements of FAST NY Shovel-Ready certification.

Collier County, FL[4]

The Collier County Fast Track Program is an expedited review program to encourage and support economic development by streamlining the development process, providing process certainty,

[3] Empire State Sho vel-Ready Program; https://esd.ny.gov/fast-ny
[4] https://www.collieredo.org/fast-track-program

reducing approval times, and providing a central point of contact. Approved fast track projects receive priority review.

Collier County's Target Industries

By helping companies from the economy's targeted industries grow, the Office of Business & Economic Development is diversifying the county's economy and believe we offer these industries a competitive advantage.

- Corporate Headquarters
- Cleantech
- Manufacturing
- Life Sciences
- Defense & Homeland Security
- Aviation & Aerospace
- Information Technology
- Financial & Professional Services

Qualifying Application Types

Qualifying applications are development orders or permits, that include, but are not limited to:

- Rezone petitions, including those for planned unit developments and amendments.
- Construction plans and final subdivision plats and amendments
- Site development plans and amendments
- Building permits, including corresponding zoning, engineering, environmental, transportation, and fire code reviews

Economic Development Strategic Plan - RCM2342AS

Task 5 Report – Appendices

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City of Cape Coral Office of Economic and Business Development.

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June 11, 2024

CITY OF CAPE CORAL – CAPE COMPETES INCENTIVES

Ad Valorem Tax Incentive Program

Program Overview
The Ad Valorem Tax Incentive Program offers a limited exemption from payment of municipal ad valorem taxes (property taxes) to qualified businesses/developers looking to invest and create new jobs. The exemption applies to the assessed value of new improvements and tangible personal property. The exemption will not be applicable to the land upon which the business is located.

What is Eligible for the Exemption

- Qualifying New Business - Up to 100% of assessed value of all improvements and all tangible personal property.
- Qualifying Expansion of Existing Business - Up to 100% of assessed value of added improvements for expansion and net increase of all tangible personal property acquired to facilitate the expansion.

Ineligible Expenditures
The Exemption will not apply to improvements made for or by the business that have been included on the tax rolls prior to the effective date the exemption was granted.

Exemption Criteria
The criteria used in making the determination as to whether the project qualifies for an exemption is shown below:

Tier	Number of New Jobs	Average Annual Wage or Capital Investment	Period	Maximum Exemption
One	10 or more Full-Time Equivalent Employees in Manufacturing Jobs	100% of the Average Annual Private Sector Wage or Capital Investment exceeding $10,000,000	5 Years	50%; or if property is located in a designated brownfield area or enterprise zone – 75%
One	25 or more Full-Time Equivalent Employees where the Business's Sales Factor is less than 50%	100% of the Average Annual Private Sector Wage	5 Years	50%; or if property is located in a designated brownfield area or enterprise zone – 75%

One	50 or more Full-Time Equivalent Employees in Office Jobs if a New Business	100% of the Average Annual Private Sector Wage or Capital Investment exceeding $5,000,000	5 Years	50%; or if property is located in a designated area
Two	25 or more Full-Time Equivalent Employees in Manufacturing Jobs	115% of the Average Annual Private Sector Wage or Capital Investment exceeding $20,000,000	7 Years	50%; or if property is located in a designated brownfield area or enterprise zone – 75%
Two	50 or more Full-Time Equivalent Employees where the Business's Sales Factor is less than 50%	115% of the Average Annual Private Sector Wage	7 Years	50%; or if property is located in a designated brownfield area or enterprise zone – 75%
Two	50 or more Full-Time Equivalent Employees in Office Jobs if a New Business	115% of the Average Annual Private Sector Wage or Capital Investment exceeding $10,000,000	7 Years	50%; or if property is located in a designated brownfield area or enterprise zone – 75%
Three	75 or more Full-Time Equivalent Employees in Manufacturing Jobs	125% of the Average Annual Private Sector Wage	10 Years	50%; or if property is located in a designated brownfield area or enterprise zone – 75%
Three	75 or more Full-Time Equivalent Employees where the Business's Sales Factor is less than 50%	125% of the Average Annual Private Sector Wage	10 Years	50%; or if property is located in a designated brownfield area or enterprise zone – 75%
Three	75 or more Full-Time Equivalent Employees in Office Jobs if a New Business	125% of the Average Annual Private Sector Wage	10 Years	50%; or if property is located in a designated brownfield area or enterprise zone – 75%

Breaking Barriers to Business (B2B) Program

The City of Cape Coral Community Redevelopment Agency issues the following Notice of Funding Availability (NOFA) for the FY 2023 Breaking Barriers to Business (B2B) Grant Program to support incentive grants to assist with site development costs of new non-residential construction, building/facility expansions or renovations.

Program Overview

The Breaking Barriers to Business (B2B) Program is an initiative by the City of Cape Coral, Florida, designed to encourage new non-residential construction, building expansions, and renovations in the South Cape area. The purpose of the B2B program is to provide grant assistance to developers and business owners who are looking to invest in the South Cape Community Reinvestment Area and meet the requirements of the City's Land Development Code.

The B2B program is intended to support economic development and growth in the South Cape area by providing financial assistance to businesses and developers who are committed to building, expanding, or renovating their facilities in compliance with the City's regulations. By doing so, the B2B program seeks to remove barriers to business development and promote the growth of the local economy.

Through the B2B program, eligible businesses and developers can receive grant assistance to cover the costs incurred in meeting the requirements of the City's Land Development Code. This may include costs associated with site development, building construction, renovation, and other related expenses. By providing financial assistance for these costs, the B2B program aims to make it easier for businesses and developers to invest in the South Cape area and promote the economic growth of the region.

Overall, the B2B program is an important tool for promoting economic development and growth in the South Cape area, by encouraging businesses and developers to invest in the region and meet the City's Land Development Code requirements.

Program Goals

The Breaking Barriers to Business (B2B) Grant Program aims to achieve several program goals that align with the City's broader economic development objectives. These goals are designed to support job creation, business attraction and retention, enhance the local economy, improve infrastructure, and foster collaboration between the City of Cape Coral and the business community. The program seeks to accomplish the following:

- Job Creation: The B2B Grant Program aims to encourage projects that have the potential to create new employment opportunities within the City of Cape Coral. By providing incentive grants for site development costs, the program incentivizes businesses to invest in the community, expand their operations, and generate job opportunities for local residents.

- Business Attraction and Retention: The program aims to attract new businesses to the area and support existing businesses in their expansion efforts. By offering financial assistance for new non- residential construction, building/facility expansions, or renovations, the B2B Grant Program helps businesses overcome financial barriers, making it more attractive for them to establish or expand their operations within the city.

- Impact on the Local Economy: The B2B Grant Program recognizes the importance of economic growth and its impact on the local community. By facilitating new construction, expansions, or renovations, the program stimulates economic activity, increases tax revenue, and contributes to the overall prosperity of Cape Coral. The program focuses on projects that have the potential to positively influence the local economy and enhance the city's economic competitiveness.

- Improved Infrastructure: In order to support sustainable economic development, the B2B Grant Program emphasizes the importance of infrastructure improvements. The program encourages projects that not only contribute to the physical development of businesses but also enhance the surrounding infrastructure. This may include improvements to roads, utilities, transportation systems, or other public amenities that can support the growth and success of businesses in the area.

- Fostering Collaboration: The B2B Grant Program aims to foster collaboration and partnership between the City of Cape Coral and the business community. By providing financial incentives, the program encourages businesses to work closely with the city government, creating a collaborative environment that promotes shared goals and objectives. This collaboration helps ensure that projects align with the city's development plans, regulatory requirements, and long-term economic vision.

By pursuing these program goals, the Breaking Barriers to Business (B2B) Grant Program plays a crucial role in promoting economic development, job creation, and infrastructure improvements in the City of Cape Coral. It encourages businesses to invest in the community, fosters a supportive business environment, and strengthens the overall economic vitality of the city.

Funding Availability

Approximately $250,000 has been made available under the 2023 Breaking Barriers to Business (B2B) Program. The B2B program is a reimbursement-based program providing up to 20 percent of capital costs for eligible capital improvement projects. Projects exceeding $25,000 are eligible for a grant of 20 percent of capital costs, not exceeding $50,000. To be eligible, projects must have a minimum capital investment of $25,000. Disbursement of funds will be made only after the recipient secures all necessary permits and approvals, including a certificate of occupancy.

As a condition of award, all applicants that receive B2B funding will be required to place a sign or placard at sites supported under this award that informs the public that the improvement is funded in part by the Cape Coral Community Redevelopment Agency (CRA). Please note that awards are subject to funding availability and at the discretion of the City Manager/CRA.

Eligibility Criteria

Eligible applicants include business owners and developers proposing new non-residential construction, building expansions or renovations in the South Cape area of the City. All proposed projects must be located within the South Cape area as defined in defined by the Cape Coral South Cape CRA.

- A minimum investment of $25,000 is required of all applicants, which can include land/building acquisition costs and soft costs such as design and permitting.
- Expenditures incurred up to 24 months prior to the date of grant submission will be allowed in calculating minimum investment.
- Expenditures incurred up to 90 days prior to submission of the grant application will be allowed for the grant amount calculated.
- Projects must have a permit application number assigned by the Development Services Department.
- Standalone residential development projects are ineligible.

Eligible Expenditures

Land improvement and development costs including:

- On-site infrastructure design and construction
- Right-of-way improvements required by new construction or on-site improvement

- Landscaping and road beautification costs
- Water and sewer connection fees
- Telecommunication connection fees and costs
- Drainage facilities in conjunction with new construction or on-site improvements
- Construction of new curbs
- Curb cuts, medians, shoulders, and sidewalks
- Relocating utilities to accommodate new construction or on-site improvements
- Other types of site development expenses that may be approved by the city
- Payment of impact, Contribution In Aid of Construction (CIAC), and special assessment fees assessed by the city

Business Infrastructure Grant

Program Overview

The Business Infrastructure Grant Program encourages new non-residential construction, building/facility expansions or renovations for office; life sciences, healthcare, biotechnology, pharmaceuticals, and medical devices; information technology, telecommunications, communications and cybersecurity; financial and professional services, banking, insurance, securities and investments; corporate or regional headquarters; engineering, legal, accounting and consulting; manufacturing, logistics and distribution; marine-related industries and wholesale distribution and warehousing. The program provides incentives to developers to assist with site development costs.

Eligibility Criteria

(1) Owners/developers of new non-residential construction, building/facility expansions or renovations for office; life sciences, healthcare, biotechnology, pharmaceuticals, and medical devices; information technology, telecommunications, communications and cybersecurity; financial and professional services, banking, insurance, securities and investments; corporate or regional headquarters; engineering, legal, accounting and consulting; manufacturing, logistics and distribution;, marine- related industries and wholesale distribution and warehousing.

(2) Requires a minimum capital investment of $500,000 (excluding land).

(3) Standalone residential development projects are ineligible

Eligible Expenditures

(1) Land improvement and development costs, including infrastructure design and construction, road improvements required by new construction or on-site improvement, landscaping and road beautification costs, water and sewer connection fees, telecommunication connection fees and costs, drainage facilities in conjunction with new construction or on-site improvements, construction of new curbs, curb cuts, medians, shoulders, and sidewalks, relocating utilities to accommodate new construction or on-site improvements, and other types of site development expenses that may be approved by the city.

(2) Payment of impact, permitting, licensing, and special assessment fees assessed by the city.

Ineligible Expenditures

(1) Inventory
(2) Payment of delinquent taxes or debts
(3) Payments to owners

(4) Purchase a part of a business and any other non-capital related expenditures
(5) Refinancing of existing debt
(6) Working capital
(7) Real property acquisition
(8) Inventory
(9) Office equipment and furniture

Award and Funding Limits

(1) Projects with a capital investment (excluding land) of $1 million or less: 5 percent of eligible costs not to exceed $50,000.

(2) Projects with a capital investment (excluding land) exceeding $1 million: 10 percent of eligible costs not to exceed $250,000.

(3) Incentive funds will be performance-based and distributed after the incentive recipient secures all permits and approvals including a certificate of occupancy.

Cape Collaborates – Small Business Partner Program

Program Overview

This program will encourage new small business start-ups, expansion of existing businesses and relocation of out-of-market businesses to the city by providing eligible small businesses with increased access to capital through a zero-interest, five-year forgivable loan.

Eligibility Criteria

To participate businesses must:

(1) Be a for-profit, privately held business.
(2) Be in, or relocating to, the City of Cape Coral.
(3) Employ less than 10 full time employees.
(4) Generate average annual gross revenues of $1 million or less per year for the last two years.
(5) Be engaged in the following industries, occupations, or services:
  a) Administrative services
  b) Construction trades
  c) Finance and insurance
  d) Health care services
  e) Information services technology, telecommunications, and communications
  f) Manufacturing
  g) Marine industries
  h) Professional services
  i) Technical services
  j) Veterinary services
  k) Warehousing and logistics
  l) Wholesale trade
(6) Check cashing establishments, pawn shops, and payday loan establishments are ineligible.

Eligible Expenditures

(1) Capital improvements associated with new construction, renovation, or tenant improvements.
(2) Payment of impact, permitting, and special assessment fees assessed by the City or other public entity.
(3) Capital machinery, manufacturing equipment, furniture, and fixtures.
(4) Business advertising.

Ineligible Expenditures

(1) Inventory
(2) Payment of delinquent taxes or debts

(3) Payments to owners
(4) Purchase a part of a business and any other non-capital related expenditures
(5) Refinancing of existing debt
(6) Working capital

Award and Funding Limits

Minimum: $5,000; Maximum: $50,000

CreativeCape Arts Program

Program Overview
The creative economy contributes to the economic vitality of a community. According to Citizens for Florida Arts, Inc., a vibrant arts community not only keeps residents and their discretionary spending close to home, but it also attracts visitors who spend money and help local businesses thrive. The CreativeCape Arts Incentive Program seeks to foster cultural development in the city, but more specifically, within the City of Cape Coral Community Redevelopment Area. The City, and CRA should the CRA adopt this Program, may provide incentives to individuals, nonprofit cultural organizations, and other entities to support arts and culture businesses operating in or relocating to the city.

Eligibility Criteria
(1) Applicants must be either:
(a) a for-profit business or non-profit organization primarily engaged in music, dance, drama,theater programs, films, festivals, creative writing, literature, painting, sculpture, folk arts, photography, crafts, public media, and the execution and exhibition of other cultural art forms; or
(b) a developer seeking to build or renovate buildings specifically designed to house businesses in the creative industries listed in paragraph (a) above.
(2) Adult entertainment facilities and/or businesses, gaming rooms, body piercing establishments and tattoo parlors are ineligible.

Eligible Expenditures
(1) Acquisition, development, construction, renovation, expansion, or improvements of real property within the Community Redevelopment Area, including live/workspaces.
(2) Assistance and support to individual artists and organizations with expenses associated with one or more specific cultural art programs, activities, events, or performances on a specified date(s) or time frame(s).

Ineligible Expenditures
(1) Inventory
(2) Office equipment and furniture
(3) Payment of delinquent taxes or debts
(4) Payments to owners
(5) Purchase a part of a business
(6) Refinancing of existing debt

Award and Funding Limits
Minimum: $5,000; Maximum: $250,000, but in no event shall the incentive amount exceed 25 percent of total project

Demolition Assistance Grant Program

The Cape Coral Community Redevelopment Agency (CRA) Demolition Assistance Grant Program is designed to incentivize and expedite the removal of obsolete buildings and make way for redevelopment. This program provides grant funds to facilitate the demolition of existing principal and secondary/accessory structures within the CRA to achieve several economic development-focused goals.

Program Overview

The Demolition Assistance Grant Program is an initiative by the CRA designed to encourage the replacement of aging and blighted structures in the South Cape area. The purpose of this program is to provide grant assistance to property owners who are looking to invest or reinvest in the South Cape Community Redevelopment Area by replacing existing structures and to property owners who have an interest in making their properties available for development.

The Demolition Assistance program is intended to support economic development and growth in the South Cape area by providing financial assistance to property owners who are committed to improving their properties through demolition projects that prepare parcels for modern development. By doing so, the program seeks to facilitate development and promote the growth of the local economy.

Program Goals

The Demolition Assistance Grant Program aims to achieve several program goals that align with the City's broader economic development objectives. These goals are designed to support job creation, business attraction and retention, enhance the local economy, and foster collaboration between the City of Cape Coral, the CRA, and the business community. The program seeks to accomplish the following goals:

- Revitalization: The Demolition Assistance Grant Program is designed to revitalize underutilized and deteriorated areas and to eliminate slum and blight.
- Economic Growth: The Demolition Assistance Grant Program will increase tax increment funding within the Community Redevelopment Agency (CRA) area of southeastern Cape Coral by promoting investment, economic growth, and the modernization of structures.
- Appearance Enhancement: The Demolition Assistance Grant Program will,

subsequent to demolition and after redevelopment, enhance the overall appearance of buildings to improve attractiveness to residents, visitors, and potential investors.

Funding Availability

The Demolition Grant Program seeks to accelerate demolition by offering demolition grants to property owners or developers reimbursing 100% of the costs up to $50,000. Costs exceeding $50,000 will receive a pro-rated grant for an amount not to exceed $75,000, as further described in section V, Grant Award, below.

As a condition of being granted an award, all applicants that receive assistance will be required to place a sign or placard at sites supported under this award that informs the public that the improvement is funded in part by the Cape Coral Community Redevelopment Agency (CRA).

Please note that awards are subject to funding availability and at the discretion of the City Manager and CRA.

Eligibility Criteria

Eligible Expenses -- Applicants shall meet the following criteria:

1. Applicants shall be the owners of the property and structure(s) proposed for demolition.
2. The program applies to both non-residential and residential structures.
3. Both for-profit and non-profit entities are eligible to apply
4. Funds shall be used for demolition of primary structures and for properties where secondary structures will be demolished along with the primary structure.
5. Buildings shall be located within the designated Cape Coral South Cape CRA.
6. Interior demolition expenses are not covered under this program.

Ineligible Expenses:

1. Any service performed by a non-licensed contractor.
2. Complete or partial demolition of a building made prior to the awarding of a Demolition Assistance Grant.
3. Interior demolition

Grant Award

The Demolition Grant Program will provide grants covering 100% of demolition costs up to $50,000. Grants will be awarded to cover demolition costs exceeding $50,000 using a formula that combines $50,000 with 50% of expenses over $50,000; the total grant amount shall not exceed $75,000.

Demolition Costs	Rate of Reimbursement	
Up to $50,000	100%	
> $50,000	$50,000 + 50% of additional costs ($75,000 grant maximum)	Example: $70,000 Demolition $20,000 additional cost ($70,000 - $50,000 = $20,000) 50% of $20,000 = $10,000 $50,000 + $10,000 = $60,000 grant

Program Guidelines

a. Approval by the CRA Board shall be secured prior to commencement of work. If a Grant is approved by the CRA Board, the CRA Executive Director shall provide written documentation to the Applicant indicating the amount of the Grant (reimbursement) and the specific requirements necessary to receive the Grant.

b. Applicants shall obtain three (3) bids from licensed demolition contractors.

c. Water/sewer invoices and all taxes shall be paid current for the property subject to the application.

d. As a condition of approval by the CRA, City liens and outstanding debts to the CRA or City, if any, shall be paid.

e. Applicants shall submit a copy of an Environmental Study at the time of application indicating whether any contaminants, toxic substances, hazardous materials, etc. are within the structure(s). And if so, stating how those substances will be remediated prior to, or during, demolition.

f. Applicants shall hire a licensed contractor authorized to conduct business and perform demolition activities in the City of Cape Coral. All quotes/bills/invoices shall reflect the contractor's license number.

g. Applicants shall ensure that all required permits and approvals are obtained (demolition, site clearance, and all others that are applicable).

h. Demolition of the building(s) shall be completed within four (4) months of either the award of the grant or the permit issuance, whichever occurs last, unless a written extension is requested of, and is granted by, the CRA Board.

Application Instructions

The program application and list of required documents are available on the City of Cape Coral website at https://www.capecoral.gov/edo/business/incentives.php.

Applicants shall submit all required application forms and submit a completed application to be considered for assistance.

On behalf of the CRA, the Economic Business and Development Office (EBDO) and the Development Services Department (DSD) staff shall review the application for completeness. A Pre-Application meeting should be scheduled with the EBDO prior to submission of an application. A post-application submittal meeting may be held with the Applicant to discuss any issues pertaining to the application. At this time, additional information may be requested.

Upon receipt of an application, and all additional information requested, if any, the EBDO and DSD staff shall review the application and make a recommendation to the CRA Board to either approve or deny the application and state the reasons for such recommendations.

The CRA Board shall determine the Applicant's funding request for approval or denial by majority vote of the CRA Commissioners present at such meeting.

Required Application Documents

1. Demolition Schedule
2. Photographs of existing building and proposed demolition area.
3. Site Plan or Survey, drawn to scale, depicting the buildings and impervious surface areas upon the site.
4. Report on toxic substance/contaminant study
5. Three (3) competitive cost estimates from licensed and insured contractors. The proposals should give detailed information about the work to be done, materials to be used, costs and the project completion schedule. Two (2) bids will be considered acceptable if the cost difference between them falls within a 10% margin.

- *Contractors and/or materials cannot be changed without prior written staff approval. At staff's discretion, a change in contractors or materials may require a new CRA Board Approval*

Evaluation

Application scoring will be based on a 100-point scale. Applicants with a score of 60 or higher will be referred to the CRA Board for consideration.

- <u>Community Impact (25 points):</u> Assessment of how the demolition will benefit the community such as removing blight and enhancing aesthetics
- <u>Environmental Impact (25 points) :</u> Assessment of environmental consequences of the demolition, including potential contamination, degree to which the building poses safety hazards.
- <u>Economic Revitalization (20 points):</u> Assessment of how the demolition could stimulate economic growth by attracting new development, businesses, or investment.
- <u>Overall Project Vision (30 points):</u> Assessment of how the demolition fits into the broader vision of the South Cape Downtown Community Redevelopment Plan.

Award Reimbursement

The Applicant shall incur all initial demolition costs and may receive reimbursement from the CRA only after the demolition has been completed in accordance with the grant award.

The CRA shall disburse grant funds upon finding the demolition is complete. The finding of demolition completion shall be granted when the following package is received:

1. Written notification from the owner that the demolition is complete; and
2. Copies of all required permits and inspections, if required; and
3. Copies of paid invoices and evidence of payment (cancelled checks, credit card receipts); and
4. Photographs of completed demolition.

Enhanced Property Value Recapture Grant

Program Overview

The Enhanced Property Value Recapture Grant is designed to attract larger-scale private capital investment and/or redevelopment into a mixed-use or nonresidential project site to create a destination, town center or mixed-use development; redevelop properties within the Community Redevelopment Area; expand the tax base, create employment opportunities, or attract targeted industries and businesses. Utilizing a "base year" assessed property value (from the Property Appraiser's database) for the project, a percentage of the incremental increase in ad valorem taxes on real and/or tangible personal property paid by the Project above the base year amount is available as a grant to incentivize the project.

Eligibility Criteria

(1) New construction of non-residential or a mixture of uses containing a combination of residential dwellings with commercial retail, service, or office uses or any combination thereof that generate additional municipal ad valorem tax revenue.

(2) Mixed use projects located outside of the Community Redevelopment Area are eligible provided that the non-residential component, excluding fast food restaurants, gas stations, and public/outdoor storage, consists of a minimum of 20 percent of the square footage of the project

(3) Light industrial, industrial, warehousing and logistics developments

(4) Proposed project must provide proof of a commitment by a financial institution or equity partner(s) financing the construction, equipping, furnishing and completion of the Project.

(5) The applicant/developer must invest a minimum of $10 million in construction or renovation (excluding land).

(6) The applicant/developer may be required to provide guarantees to the city to cover any shortfall in costs not paid by future tax increments. These may include construction guarantees, letters of credit, personal or corporate guarantees and/or minimum payment agreements.

Eligible Expenditures

(1) Public improvements associated with the project. Public improvements can be located on a project site, directly adjacent to the project site, or within the general vicinity of the project site if those improvements are necessary for or associated with the project.

(2) Site preparation, demolition, grading, stormwater drainage, surcharging, and other pre-

development work prior to construction of the project such as architectural and engineering services and studies.

(3) Utility extensions and hookups.

(4) Renovation of existing properties where the cost of rehabilitation or renovation exceeds 50 percent of the property's current taxable value as indicated by the Lee County Property Appraiser or private appraisal conducted by a MAI-certified appraiser.

(5) Design and construction of property improvements including improvements to existing water and wastewater systems; provision of public parking spaces; assemblage of properties with a combination of rehabilitation, renovation, and new construction projects that when complete provide a cohesive development.

(6) Payment of impact, permitting, licensing, and special assessment fees assessed by the city.

Ineligible Expenditures The incentive award shall not accrue to improvements made by or for the use of an applicant when such improvements have been included on the tax rolls prior to the effective date of an Incentive Participation Agreement granting a project an incentive award. Award and Funding Limits. The City or CRA shall provide the minimum amount of assistance needed to provide the Project a reasonable rate of return on investment in the project and make the project viable. If a new business is locating to, or an expansion of an existing business is occurring in, the city's Community Redevelopment Area, the community redevelopment agency board of commissioners shall serve as the approving award authority in deciding whether an incentive award is to be granted. The Project must generate enough tax increment to cover the requested assistance. A grant is paid annually to the owner after construction of the project that creates the increment is completed, the property becomes taxable, and property taxes and assessments are paid.

The incentive award applies only to taxes levied city-wide by the city unless the project is located within the CRA. The incentive award rebate shall not apply to taxes levied by the county (unless within the CRA), a municipal services taxing or benefit unit (MSTU/MSBU), special assessments levied by the City or other public entity, the Lee County School District, a water management district, or any other special district or to taxes levied for the payment of bonds or taxes authorized by a vote of the electors pursuant to Section 9(b) or 12, Article VII of the Constitution of the State of Florida. Not more than 20 percent of the total project cost, excluding property acquisition, will be supported by incentive revenues. Total project cost is the cost of development of the project including all, site development, and public infrastructure, and building and site amenity costs necessary to complete the project. The table below identifies the maximum amount eligible as an incentive award and the associated incentive period based upon the projected taxable value following the project's completion as determined by the Lee County Property Appraiser's office.

Projected Taxable Value	Maximum Rebate %	Incentive Period
$10,000,000-$24,999,999	50%	10 years
$25,000,000-$44,999,999	75%	15 years
$45,000,000 - $99,999,999	90% - 95%	CRA – Remaining Life City - 20 Years
$100,000,000 and beyond	95%	25 Years

Economic Development Strategic Plan - RCM2342AS

Task 6 Report – Appendices

prepared for:

City of Cape Coral Office of Economic and Business Development

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May 30, 2024

Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

Business & Financial Services

GOAL: to grow employment in white collar industries in Cape Coral

Target Industries:

- Banking
  - commercial banking
  - credit unions
  - savings institutions
- Activities related to Banking
  - mortgage lenders
  - transaction processing and clearing houses
  - check cashing
  - loan servicing
  - payday lending
- Business support services
  - call centers
  - collection agencies
  - credit bureaus
- Credit services
  - credit card issuing
  - sales financing
  - consumer lending
- Employment services
  - executive search
  - temporary employment
  - professional employment
- Facilities support services
  - janitorial
  - trash & junk removal
  - laundry services
- Investigation and security services
  - private investigation
  - armored car services
  - security systems

TARGET INDUSTRIES

- locksmiths
- Legal services
    - Lawyers
    - Notaries
    - title services
- Management, scientific, and technical consulting services
    - human resources
    - marketing
    - logistics
    - environmental
    - biotechnical
- Office administrative services
    - financial planning
    - billing and bookkeeping
    - personnel services
    - contract logistics services
    - other support services
    - packaging & labeling
    - trade show organizers
    - contract meter reading
    - lumber grading
    - contract diving
- Securities and commodity brokers
    - security brokerages
    - investment banking
    - securities underwriting
    - commodities brokers

Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

Community Services

GOAL: to provide enhanced government capabilities in Cape Coral

Target Industries:

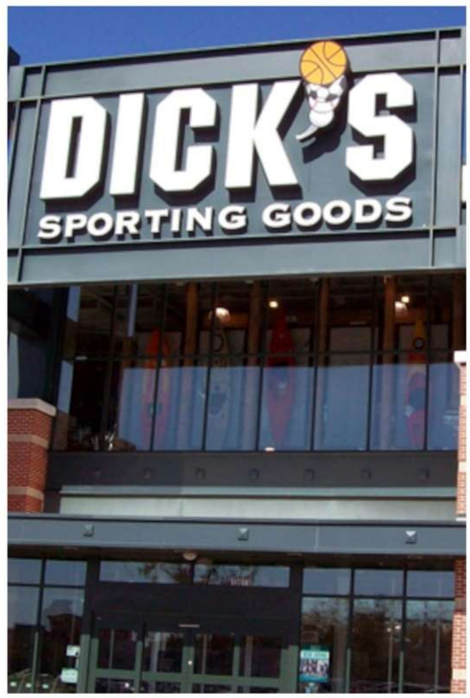
- Individual and family services
  - child & youth
  - elderly citizen & disabled
  - marriage counseling
  - crisis intervention
  - hotlines
  - multi-purpose centers
- Community food and housing, and emergency and other relief services
  - community food services
  - community housing services
  - temporary shelters
  - emergency relief
- Vocational rehabilitation services
  - vocational and job counseling
  - work experience centers
  - rehabilitation counseling
- Federal Government
  - advisory commissions offices
  - executive offices

- State Government
  - state agencies
  - courts
- Local Government
  - local government offices

Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

Consumer Products & Services



GOAL: to provide a wider array of retail opportunities for residents in Cape Coral

Target Industries:

- Automobile dealers
  - new cars and light duty trucks
  - used cars and light duty trucks
- Automotive equipment rental and leasing
  - passenger cars
  - truck, utility trailer, and RV
- Book retailers and news dealers
  - Book stores
  - comic book stores
  - newstands
- Clothing and clothing accessories retailers
  - apparel stores
  - wedding gowns
  - baby clothing
  - sports apparel
  - wig and hairpiece stores
- Florists
  - Flower shops, fresh cut
- Hardware, and plumbing and heating equipment and supplies wholesale
  - hardware
  - plumbing supplies
  - hvac equip. & supplies
  - refrigeration equip. & supplies

Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

- Household appliances and electrical and electronic goods wholesale
    - electrical equip. & supplies
    - wiring supplies
    - televisions
    - refrigerators
    - washing machines
    - recording media
    - unloaded computer circuit boards
- Miscellaneous durable goods wholesale
    - sporting & recreational goods
    - toy & hobby goods
    - recyclable materials
    - jewelry, watch & precious stones
- Motor vehicle and motor vehicle parts and supplies wholesale
    - automobiles
    - motor vehicle supplies & parts
    - tires and tubes
    - used cars
- Professional and commercial wholesale
    - photographic equip. & supplies
    - office equipment
    - computers & peripherals
    - medical, dental, & hospital equip. & supplies
    - ophthalmic goods
- Shoe Retailers
    - men's and women's shoes
    - children's shoes
    - athletic shoes
    - orthopedic shoes
- Sporting goods, hobby, and musical instrument retailers
    - sporting goods stores
    - hobby, toy, and game stores
    - sewing, needlework, and piece goods stores
    - musical instruments & supplies stores
- Used merchandise retailers
    - antique dealers
    - auction houses
    - consignment shops
    - flea markets, permanent
    - thrift shops
    - rare collectible stores
    - used merchandise stores

Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

Culinary Tourism

GOAL: to develop a unique "foodie" destination for Cape Coral

Target Industries:

- Specialty food retailers
    - produce stores
    - meat stores
    - fish & seafood stores
    - gourmet food stores
    - bakeries
    - confectionery & nut stores
    - tea & coffee stores
    - ice cream shops
- Special food services
    - food service contractors
    - caterers
    - food trucks
    - lunch wagons
    - mobile refreshment stands
    - street vendors, food
    - ice cream trucks

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Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

Healthcare & Life Sciences

GOAL: to provide a superior network of health services in Cape Coral

Target Industries:

- General medical and surgical hospitals
  - children's hospitals, general
  - general and surgical hospitals
  - micro-hospitals
  - osteopathic hospitals
- Home health care services
  - home health agencies
  - home infusion therapy
  - hospice care
  - nursing agencies
  - visiting nurse associations
- Medical and diagnostic laboratories
  - medical laboratories
  - dental laboratories
  - diagnostic imaging centers
  - medical forensics
  - mobile x-ray facilities
- Offices of dentists
  - family dentists
  - endodontists
  - oral pathologists
  - periodontists
  - prosthodontists
  - dental surgeons
- Offices of other health practitioners
  - chiropractors
  - optometrists
  - metal health practitioners
  - podiatrists
  - acupuncturist
  - hypnotherapists
  - practical nurses

Economic Development Strategic Plan
Business Retention & Expansion Roundtables

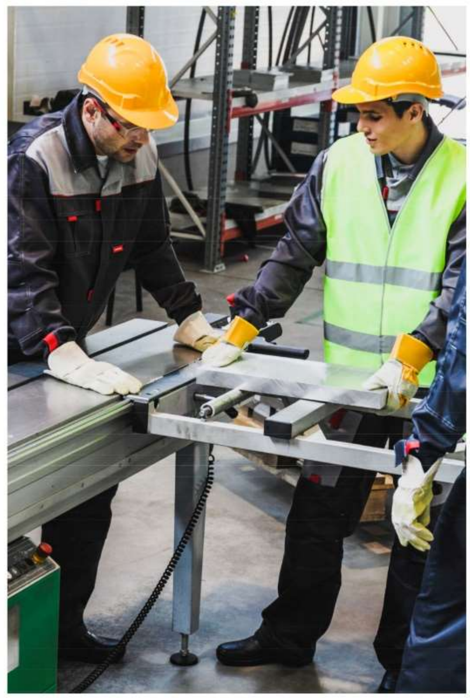
TARGET INDUSTRIES

- Offices of physicians
  - allergists
  - cardiologists
  - clinical pathologists
  - dermatologists
  - family physicians
  - gynecologists
  - immunologists
  - neurologists
  - obstetricians
  - oncologists
  - pediatricians
  - plastic surgeons
  - proctologists
  - psychologists
  - psychiatrists
  - surgeons
  - urologists
- Other ambulatory health care services
  - ambulance services
  - blood and organ banks
  - pacemaker monitoring
  - physical fitness evaluation
- Outpatient care centers
  - family planning centers
  - substance abuse centers
  - kidney dialyses centers
  - laser surgery centers
  - urgent medical care centers
- Psychiatric and substance abuse hospitals
  - alcohol and drug addiction rehabilitation
  - mental health
- Specialty (except psychiatric and substance abuse) hospitals
  - cancer
  - chronic disease
  - maternity
  - physical rehabilitation
- Scientific research and development services
  - nanotechnology r&d
  - biotechnology r&d
  - archeological r&d
  - demographic r&d
  - learning disabilities r&d
  - psychological r&d

Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

Industrial Services



GOAL: to support industrial activities in growing manufacturing sectors in Cape Coral

Target Industries:

- Coating, engraving, heat treating, and allied activities
  - metal heat treating
  - electroplating, plating, polishing, anodizing, and coloring
- Commercial and industrial machinery and equipment repair and maintenance
  - armature rewinding
  - blade sharpening
  - cargo container repair
  - electric motor repair
  - food machinery repair
  - freezer, commercial repair
  - mechanical power transmission equip. repair
  - service equip. repair
  - welding services
- Fuel dealers
  - alternative fuels
  - bottled gases
- Machine shops; turned product; and screw, nut, and bolt manufacturing
  - machine shops
  - screw, nut, & bolt mfg.
  - washers
  - hose clamps
  - rivets
  - turnbuckles
- Machinery, equipment, and supplies wholesale
  - construction & mining equip.
  - farm & garden machinery
  - industrial supplies

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- service establishment equip. & supplies
- transportation equip. & supplies

- Metal and mineral (except petroleum) wholesale
  - metal service centers
  - metal and nonmetallic ores
  - minerals
  - precious metals
- Other fabricated metal product manufacturing
  - fluid power valves & hoses
  - plumbing fixture fittings
  - ball & roller bearings
  - ammunition
  - small arms
  - fabricated pipe
  - steel wool

Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

IT and Media

GOAL: to encourage information technology and media production activities in Cape Coral

Target Industries:

- Advertising, public relations, and related services
  - advertising agencies
  - public relations agencies
  - media representatives
  - indoor & outdoor display advertising
  - direct mail
  - advertising distribution services
  - sign-making
  - promotional specialties mfg.
- All other telecommunications
  - satellite tracking
  - communications telemetry
  - radar station operation
- Computer systems design and related services
  - custom programming
  - industrial robot automation
  - search engine optimization
  - website design
- Electronic and precision equipment repair and maintenance
  - broadcast equip.
  - cameras
  - computer peripherals
  - dental equip.
  - laptops
  - medical & surgical equip.
  - optical instruments
  - radar & sonar equip.
  - telephones

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Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

- Media streaming distribution services, social networks, and other media networks and content providers
  - cable broadcasting & streaming services
  - social media content providers
  - syndicates, news
- Motion picture and video industries
  - motion pictures producing & distribution
  - television commercials
  - theatres, motion pictures
  - video production
- Radio and television broadcasting stations
  - radio broadcasting stations
  - television broadcasting stations
- Satellite telecommunications
  - earth stations
  - resellers, satellite telecom.
  - telephone telecom. carriers, satellite
- Software publishers
  - application developers
  - gaming site publishers
  - packaged software
- Sound recording industries
  - music publishers
  - sound recording studios
  - master recoding licensing
  - prerecorded music

Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

Sustainable Real Estate

GOAL: to promote innovative and resilient development practices in Cape Coral

Target Industries:

- Activities related to real estate
  - asset management services
  - escrow agents
  - listing services
  - real estate property managers
  - real estate appraisers
  - real estate consultants
- Architectural, engineering, and related services
  - architects
  - landscape architects
  - engineers
  - drafting services
  - surveyors
  - testing laboratories
- Lessors of real estate
  - apartment building renting & leasing
  - equity real estate investment trusts (REITs)
  - mobile home renting & leasing
  - office building rental or leasing
  - industrial building rental or leasing
  - reception hall rental or leasing

  - shared workspace provision
  - stadium rental or leasing
  - theater property rental or leasing
- Lumber and other construction materials merchant wholesale
  - Lumber, plywood and millwork
  - brick, stone & related materials
  - roofing, siding & related materials

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Economic Development Strategic Plan
Business Retention & Expansion Roundtables

TARGET INDUSTRIES

- flat & plate glass
- prefabricated buildings
- ornamental ironwork
- fencing & accessories
- storage bins
- ceiling tile
- culvert pipe
- gypsum products
- silt fence & other fabrics
- structural assemblies

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Employer Survey

April,15 – May 3, 2024
162 Responses

City of Cape Coral Economic Development Strategic Plan - Employer Survey

Introduction

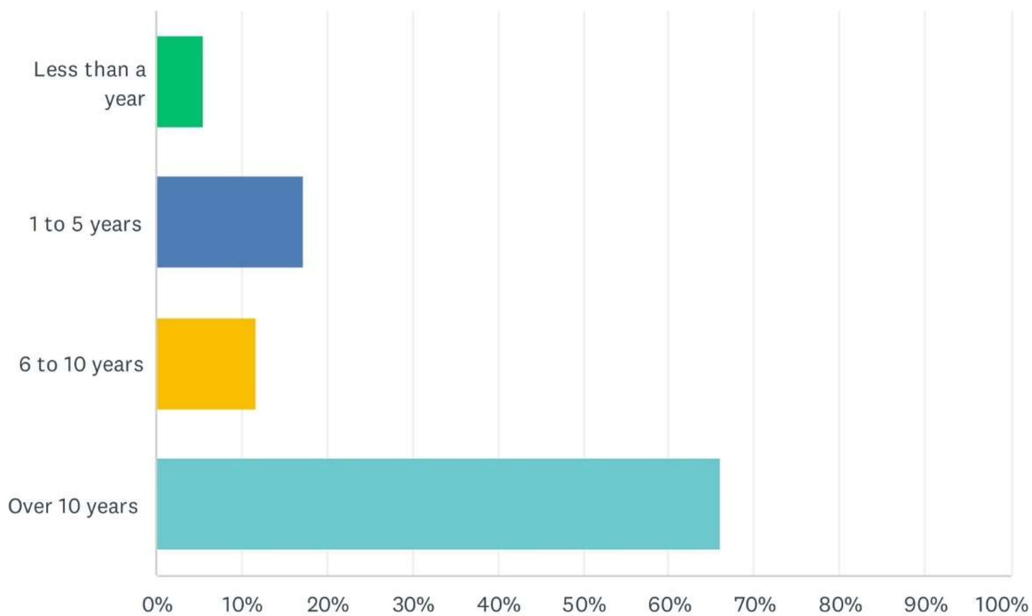
The City of Cape Coral has retained a team of consultants led by DCG Corplan Consulting LLC to develop an Economic Development Strategic Plan for Cape Coral. This initiative is focusing on the importance of growing our city's economy at a pace equal to or exceeding our projected increase in population. The DCG Corplan Team has been tasked with identifying and prioritizing sustainable economic growth, attraction of new investments, fostering of innovation, enhancement of our city's competitiveness, and maintaining or improving the quality of life.

The Team's work requires input from Cape Coral employers. Recently, two Business Retention & Expansion Roundtables were held that provided some very enlightening results. As a follow-up to these meetings, the DCG Corplan Team is asking the business public to complete a brief 10-question survey on topics that will be very important to the study. It would be greatly appreciated if you would take the time to complete this online and confidential survey.

Thank you in advance for your cooperation.

Q1 How long has your business been operating in Cape Coral?

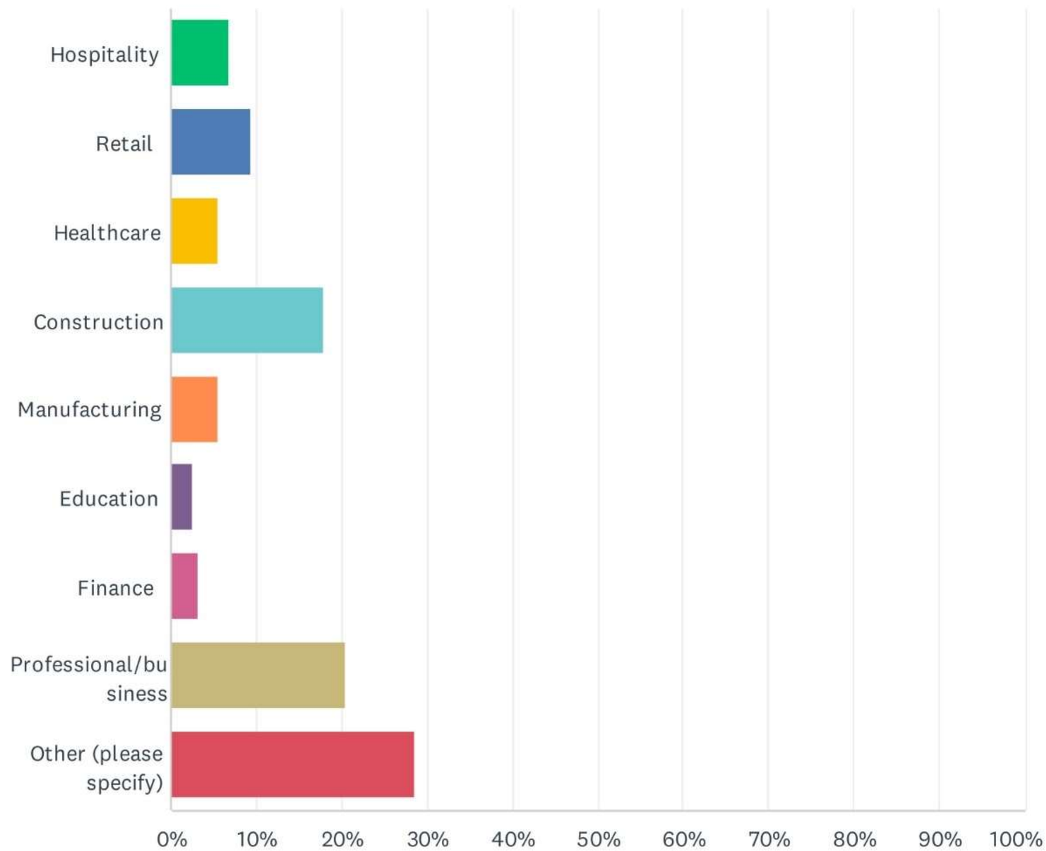
Answered: 162 Skipped: 0



Answer Choices	Responses	
Less than a year	5.56%	9
1 to 5 years	17.28%	28
6 to 10 years	11.73%	19
Over 10 years	66.05%	107
Total Respondents: **162**		

Q2 What is the primary industry of your business? (Please select one)

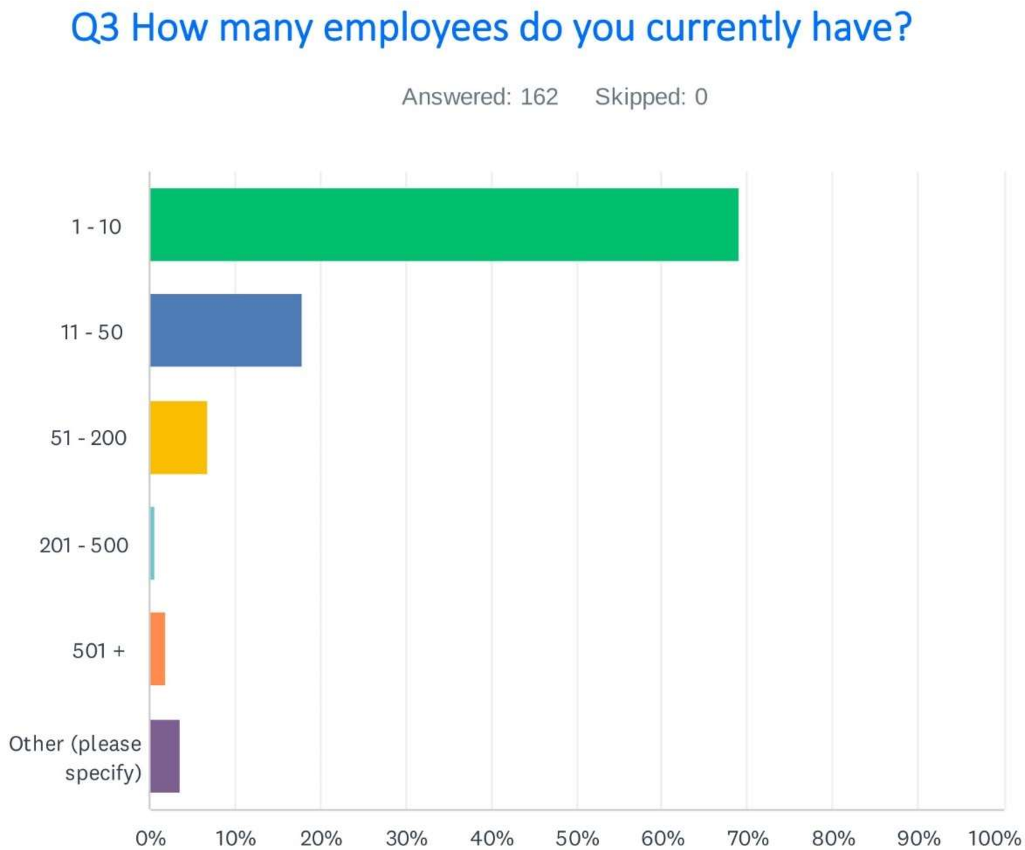
Answered: 161 Skipped: 1



Answer Choices	Responses	
Hospitality	6.83%	11
Retail	9.32%	15
Healthcare	5.59%	9
Construction	18.01%	29
Manufacturing	5.59%	9
Education	2.48%	4
Finance	3.11%	5
Professional/business	20.50%	33
Other (please specify)	28.57%	46
Total Respondents: **161**		

Other Responses:

- Appliances repair
- Automotive repair
- Beauty salon
- Boat rental
- Captain services
- Commercial construction & manufacturing
- Construction and real estate
- Consulting
- Country club
- Custom weld fabrication of shutters, railings, stairs, gates, fencing, etc.
- Dry cleaning and laundry
- Ecommerce and wholesale (chocolate)
- Engineering
- Entertainment concert production
- Family entertainment
- Florist
- Freight forwarding
- Home services. Home watch/concierge
- Insurance
- International consultancy
- Karate school
- Lawn care
- Life safety burglar, fire, and camera systems
- Media/marketing
- Non-profit museum
- P & c insurance
- Politics/government
- Print/promo
- Real estate
- Religious organization
- Service automotive
- Service office cleaning
- Services - mobile spray tans
- Title insurance
- Tourism
- Towing and roadside service
- Trades. Craftsman upholstery
- Transportation
- Wholesale distribution



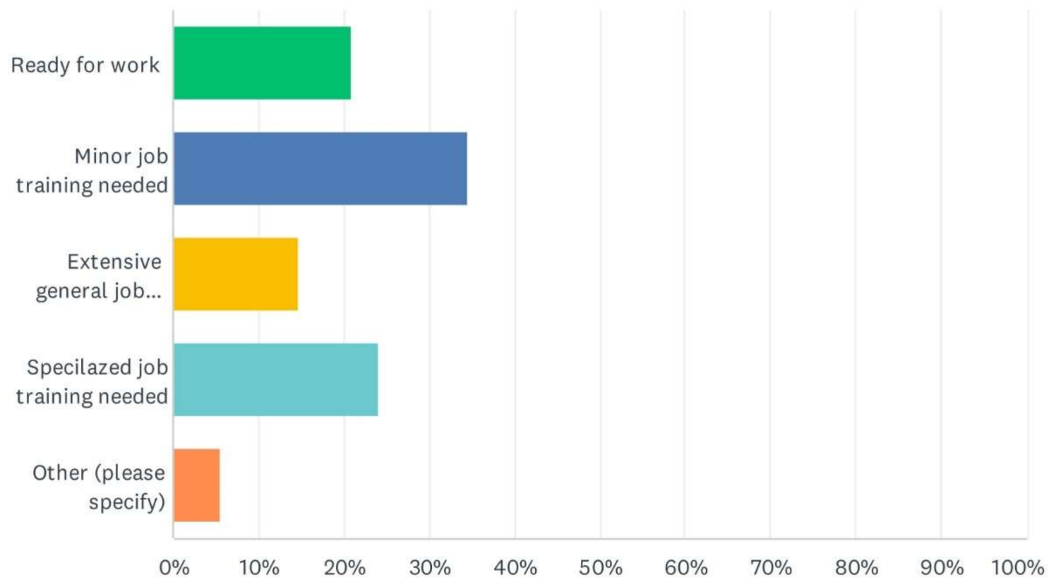
Answer Choices	Responses	
1 - 10	69.14%	112
11 - 50	17.90%	29
51 - 200	6.79%	11
201 - 500	0.62%	1
501 +	1.85%	3
Other (please specify)	3.70%	6
Total Respondents: **162**		

Other Responses:

- No Employees in Florida, based in Binghamton NY
- No employees
- 2 Husband and wife
- One full-time plus eight 1099s
- N/A
- N/A

Q4 Are the majority of job applicants ready for work, or do they require training?

Answered: 162 Skipped: 0



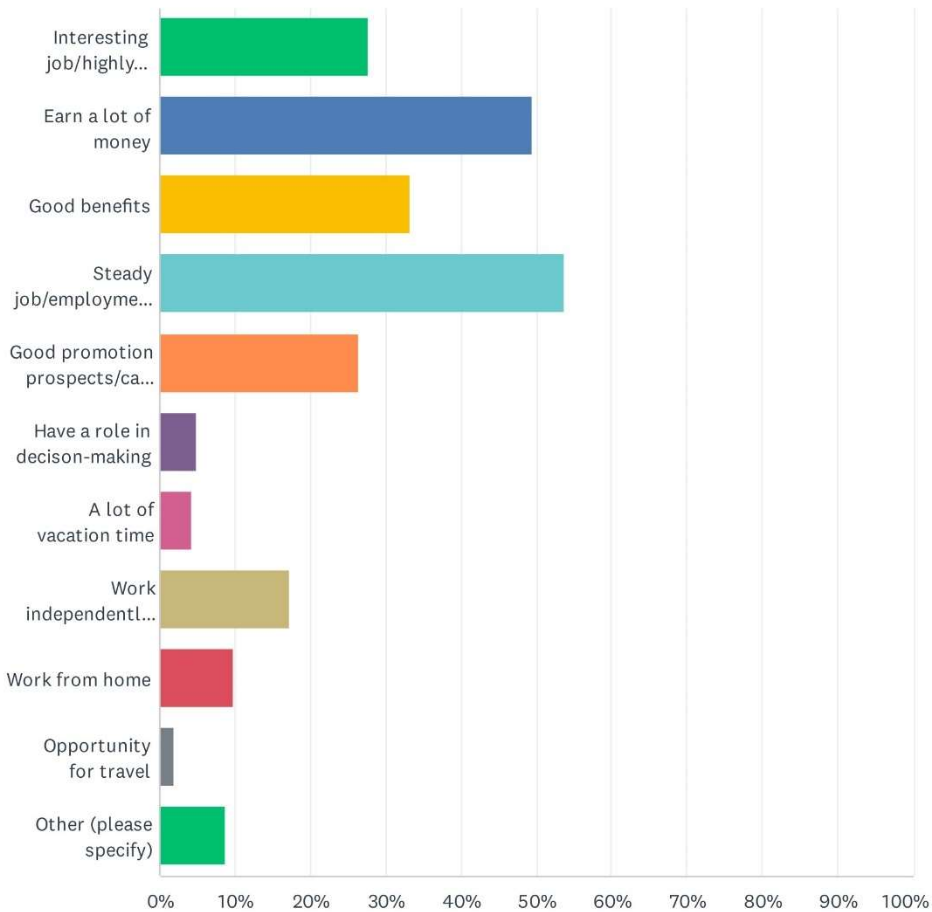
Answer Choices	Responses	
Ready for work	20.99%	34
Minor job training needed	34.57%	56
Extensive general job training needed	14.81%	24
Specialized job training needed	24.07%	39
Other (please specify)	5.56%	9
Total Respondents: **162**		

Other Responses:

- All areas of the spectrum
- I am self-employed with no employees
- N/A
- N/A
- N/A
- N/A
- No employees just me
- Sole Proprietor - no employees
- Work by myself

Q5 What are the most sought after job aspects new applicants have when seeking employment? (Please select up to three)

Answered: 162 Skipped: 0



Answer Choices	Responses	
Interesting job/highly regarded job	27.78%	45
Earn a lot of money	49.38%	80
Good benefits	33.33%	54
Steady job/employment security	53.70%	87
Good promotion prospects/career path	26.54%	43
Have a role in decision-making	4.94%	8
A lot of vacation time	4.32%	7
Work independently/without supervision	17.28%	28
Work from home	9.88%	16
Opportunity for travel	1.85%	3
Other (please specify)	8.64%	14

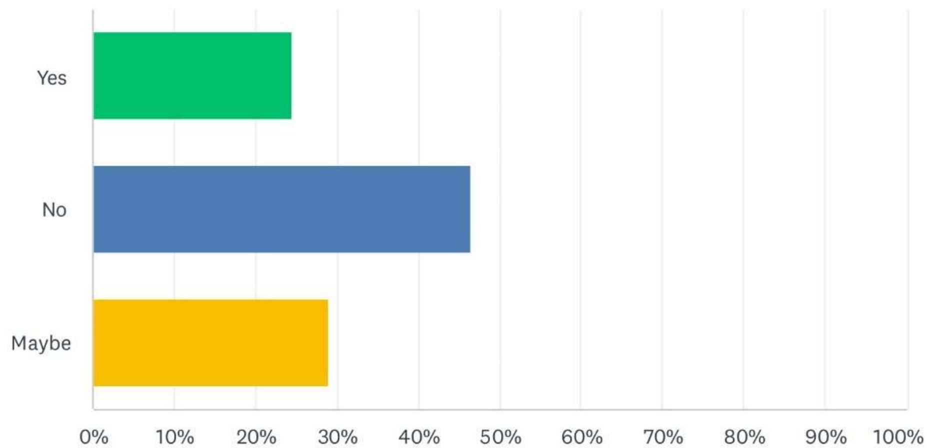
Total Respondents: **162**

Other Responses:

- Fishing on the water.
- Getting a check sent in the mail without having to work.
- Hybrid job structure, home and office.
- I don't have applicants.
- N/A
- N/A
- N/A
- Na just me.
- No Employees.
- Part time flexibility.
- Part-time gig, (don't need benefits), flexibility of schedule.
- Unknown.
- We are just a family run business, we all enjoy the flexibility.
- Working most alone as a Handyman.

Q6 Would you be interested in government-sponsored training programs to enhance the skills of your workforce?

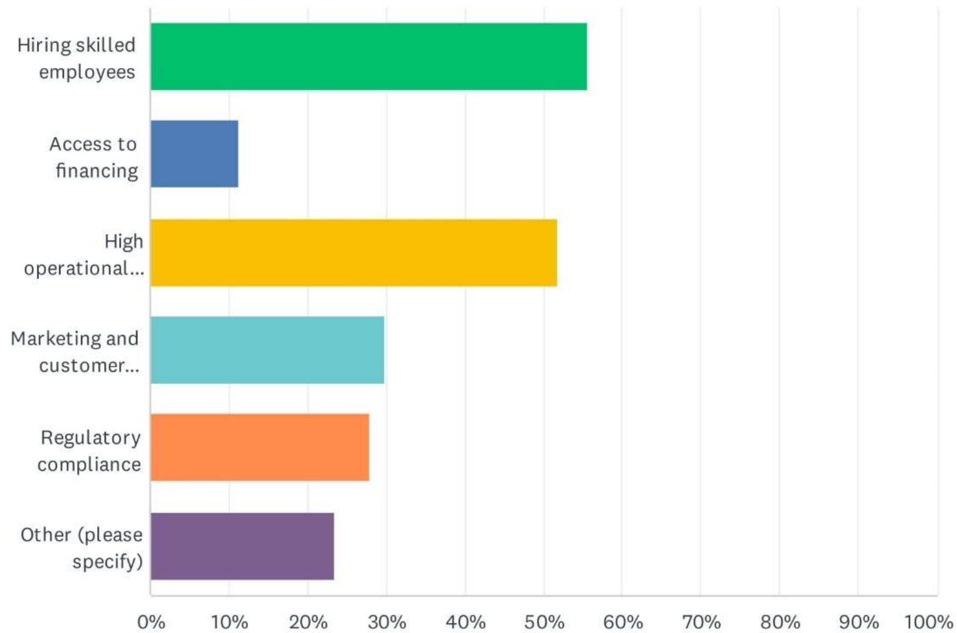
Answered: 159 Skipped: 3



Answer Choices	Responses	
Yes	24.53%	39
No	46.54%	74
Maybe	28.93%	46
Total Respondents: **159**		

Q7 What are the top three challenges your business is currently facing?(Please select up to three)

Answered: 158 Skipped: 4



Answer Choices	Responses	
Hiring skilled employees	55.70%	88
Access to financing	11.39%	18
High operational costs	51.90%	82
Marketing and customer acquisition	29.75%	47
Regulatory compliance	27.85%	44
Other (please specify)	23.42%	37
Total Respondents: **158**		

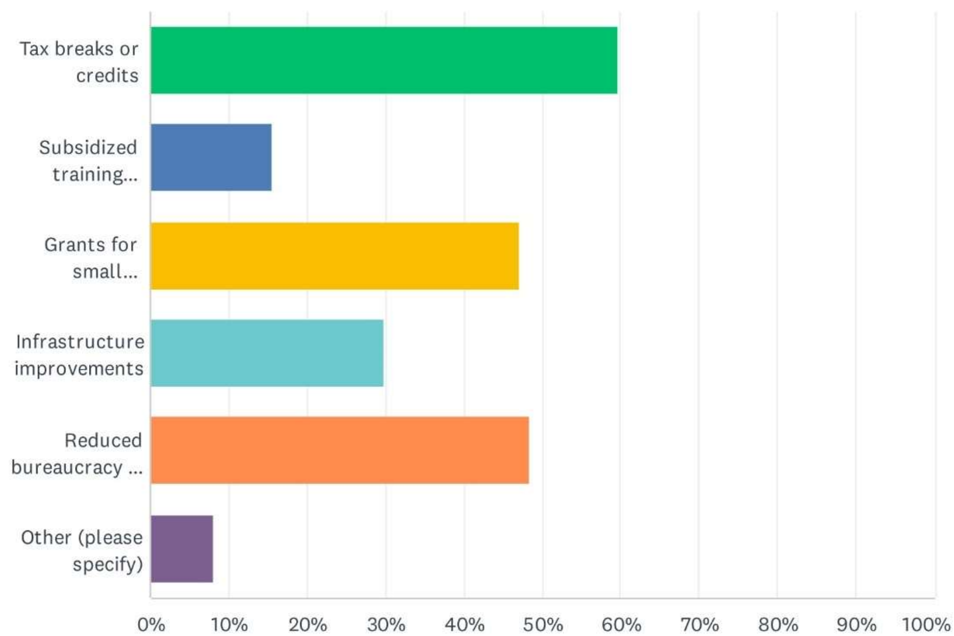
Other Responses:

- Access to affordable housing for workforce.
- Affordable housing.
- Affordable rent to open brick and mortar.
- Arbitrary and capricious building officials, ignorant elected persons.
- Cape coral rules/laws.
- City delays and barriers to building/zoning/permitting .
- City's employees lack of interest. Less bureaucracy and red tape.

- Commercial insurance costs rising.
- Damage from Hurricane Ian.
- Difficulties with permits from Cape Coral for expansion to create more jobs.
- Finding additional customer base for new customers.
- Finding motivated people that want to work.
- Florida State Law HB735 being improperly interpreted by Cape Coral; which will put us out of business.
- Govt bureaucracy.
- Hiring reliable and trainable employees.
- Home Insurance issues in the area affecting the construction market
- Increase of rent per square foot!!!.
- Increased government regulations at the city level.
- Inflation.
- Insurance costs.
- It's horrible to work with the City of Cape Coral. In case we need to move our location again, we won't choose this City again.
- Keep our taxes very low. Almost obscenely low and make the barriers to entry very low. It seems counterintuitive, but if you do this, the small biz sector in Cape Coral will explode with growth.
- Keeping up in a bad economy.
- N/A
- None.
- None of the above.
- Nothing from the named themes.
- People who want to work.
- Permitting delays and red tape.
- Rent too high!
- Samaritan Health and Wellness Center is non-profit, and half of our budget is from donations and grants; fundraising is a big challenge.
- Skilled and affordable sales and operations managers.
- Space nearby zoned industrial. Streamlined permitting (dept's talk to each other - business friendly).

Q8 Which of the following government incentives would be most beneficial for your business? (Please select up to three)

Answered: 161 Skipped: 1



Answer Choices	Responses	
Tax breaks or credits	59.63%	96
Subsidized training programs for employees	15.53%	25
Grants for small businesses	47.20%	76
Infrastructure improvements	29.81%	48
Reduced bureaucracy and faster permit processes	48.45%	78
Other (please specify)	8.07%	13
Total Respondents: **161**		

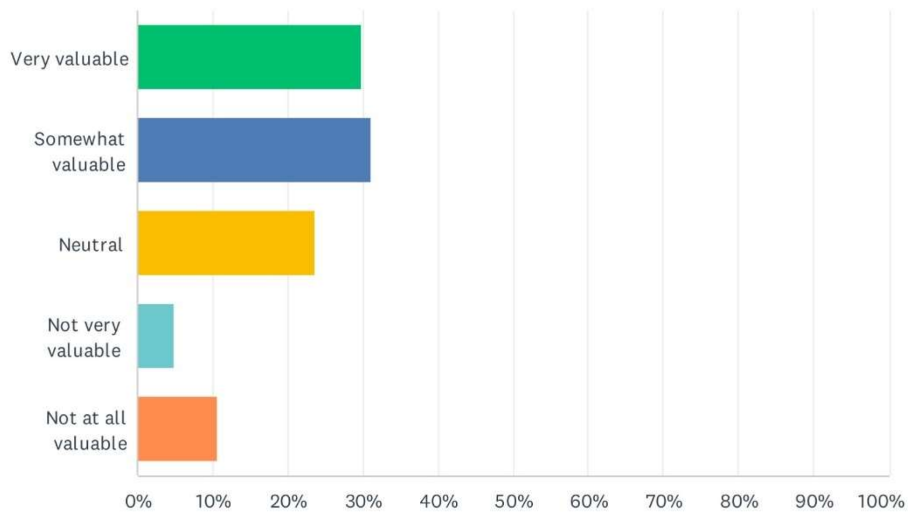
Other Responses:

- Get out of our way.
- Grants for religious organizations to serve community.
- Keep the government out of my business and let the free market work.
- License board is useless, it's only about money. So many licensed companies that do atrocious work.
- More strength in code enforcement.
- N/A
- None.

- Not ask NY for guidance.
- Procurement Hub with largest companies collaborating on a procurement/supplier/supplier diversity platform.
- Small business financing that is easy to get and simple to pay back.
- State Applications for Owl Affidavit's having to be notarized is archaic. Having to go to a bank to have this done should be obsolete. There should be an online solution.
- Support from Cape Coral City Government for our non-profit healthcare center for uninsured patients.

Q9 How valuable would partnerships between your business and local educational institutions (e.g., colleges, trade schools) be for your workforce development needs?

Answered: 161 Skipped: 1



Answer Choices	Responses	
Very valuable	29.81%	48
Somewhat valuable	31.06%	50
Neutral	23.60%	38
Not very valuable	4.97%	8
Not at all valuable	10.56%	17
Total Respondents: **161**		

Q10 What specific government actions or policies would assist your business in achieving greater success?

Answered: 94 Skipped: 68

RESPONSES	
1	Forgiving my SBA covid loan.
2	None to think of as of now.
3	Fire code enforcement, infrastructure repair and upgrade travel throughout Lee county and Cape Coral is horrendous.
4	Reduction in Federal regulations, streamlined permitting, crack down on unlicensed contracting.
5	More staff in the building department and make sure they know what they are doing. eTrakit worked fine. Changing software was a big mistake.
6	Permitting,
7	Insurance companies high prices need to improve,
8	Building department that obeys the written law, not make it up as seen fit
9	Office cleaning requires very little skill. Most of our people are part-time. They already have a daytime job. I really can't think of anything that the government can do to help with that.
10	Idk, I guess lower taxes for our business would be very beneficial!
11	Small business development grants,
12	Making available incentives for commercial Flex warehouses. There is a shortage in that. There are many residential storage facilities being built, but no commercial units.
13	Grants for small businesses.
14	Be realistic, use common sense and help the progress of the City.
15	Gaining permits faster.....
16	Government contracts.
17	Current policy (no fee for senior consulting practice) is quite satisfactory.
18	Significant training for employees working for the City of Cape Coral permitting and Business Tax Receipt departments.
19	Informed and quicker response from county agencies. We've had nothing but bad experiences with city & county offices.
20	If the cost of HO and Flood insurance were brought down to a more reasonable cost than you would have more job applicants who could afford to live in the Cape Coral area.
21	N/A
22	N/A
23	Working with trades schools that provides grants to high school kids .
24	Retain the services of a Florida / Cape Coral consultancy firm. Florida plus 14%, New York minus 9%. Stop bringing your ideas over here.
25	Faster review process.
26	Controlled rent or operational grants for small businesses and traffic infrastructure.

27	N/A
28	Remove state business licensing requirements, train DEO employees on how to do their job.
29	I am inviting our Cape Coral government officials to visit Samaritan Health and Wellness Center to see the services we provide for uninsured and underinsured Lee County citizens in regard to medical and mental health care. As a non-profit, faith-based center, having the support of our local government is important. In order to support us, visiting the facility is imperative. Please contact Dr. Susan Hook, Executive Director, at shook@capesamaritan.org or call 239-360-7520.
30	None.
31	Loans or grants for small businesses.
32	I'm not sure at this time.
33	Reduce regulatory burden. Less licensing, less permitting, less fees. Truly get government out of the way to allow business to operate. Every time you turn around there is another fee or process you have to go through.
34	Reduce the paperwork and red tape associated with construction.
35	Incentivize more manufacturing in the area.
36	Lower interest rates.
37	Cost of doing business due to insurance increase, and tax relief for small business owners.
38	More restrictions on litigation after construction projects are completed.
39	Insurance regulation.
40	Grants for businesses, easier access to capital.
41	Get stricter on illegal aliens and uninsured motorists be less strict with area zoning for towing.
42	Not having to pay for insurance premiums based on payroll for non-worked days, ex holiday, vaca, sick. G/L & W/C.
43	N/A
44	Permit training for fire alarm systems.
45	Reducing excess taxation and regulation!
46	Low interest loans for startup and expansion costs. Grants if applicable.
47	Definitely streamline the permitting process, currently it just takes too long and creates a lot of problems between customers with bank loans and actually getting the jobs to the ground.
48	Streamlined permit processing - expansion. Employee Transportation Services Rent Vouchers for skilled staff.
49	Make handling BTR online easier. Pay and print. Grants/financing to help expand. Work with zoning for more access to industrial.
50	The City of Cape Coral has issues with giving permits and make unreasonable and unrelated requests that have nothing to do with creating more tax dollars and jobs. I guess you have to be a car wash or storage facility to get a permit. We are trying to expand and create more tax revenue and jobs.
51	Increased City cooperation in permitting & licensing.

52	Lower licensing fees to almost zero. (Keep high standards, fire codes etc.) Also, as best you can, speed up the timelines to granting business licenses.
53	Get out of our way.
54	Assisting the condominium association with the Insurance increase.
55	None.
56	Less filings.
57	Lower taxes!
58	An honest and transparent city government that focuses on the wellbeing of all constituents - business and citizens.
59	A city government that supports local business and citizens. However the turmoil of this city council and their grifting and totally disrespecting business owners and citizens has no possibility of supporting anyone but their own pocketbooks.
60	Pay the police more money.
61	Less bureaucracy, much less!
62	Less licensing restrictions for construction.
63	Do not know.
64	FASTER PROCESS FOR BUILDING PERMITS
65	Not sure.
66	Permitting and inspections.
67	We need greater stability in government leadership and decision making with an emphasis on streamlining permitting and inspections. Time is money especially in the highly inflationary construction environment.
68	Upgraded infrastructure, sidewalks, and underground utilities. More codes to clean up areas to help hold up property values.
69	Getting involved with worker education and creating a career path to mechanical jobs.
70	Less regulation.
71	Keeping down the cost of CAM and rent from property management companies and landlords.
72	To Grandfather in our license, as Lee County has in fact done, 06938, to be able to continue the same work as we have done for over 20 years. Gerald worked at Coral Oaks Golf Course for 10 years in the 1980's and has been doing irrigation in Lee County since, 06938 Sunrise Irrigation & Landscaping, Inc., Now, you tell my husband he is no longer qualified. The city should be ashamed of itself.
73	Decreasing the size, scope and cost of government to let the free market work.
74	Beautification of Downtown Cape Coral specifically on Del Prado from Orchid Blvd to Cape Coral Parkway.
75	None.
76	Water and sewer with mitigated fees broken up fairly! Why should people have additional fees for what others have benefitted from already at GREATLY reduced pricing?
77	Grants.
78	Work force housing.
79	Opening up waterway access.

80	Quicker communication.
81	Our City actually Marketing itself.
82	Quicker permitting, less government.
83	Adjacent Industrial Zoning. Streamlined Permitting. Tax credits to offset higher wages and benefits.
84	Preferential treatment for local businesses in the supply of products to Cape Coral. We supply to Lee County and Ft Myers but can't seem to access Cape Coral, even though we are located there.
85	A faster process for land use entitlements, and a market driven ED Plan.
86	Grant programs for businesses to recruit students and trade workers from Florida who stay in Florida or their local communities to work.
87	Create incentives for affordable housing in the area- our workforce is leaving because they can't afford to live here. We cant hire from outside of area because wages can't compete with high cost of living.
88	Affordable housing for employees.
89	Factoring in our issues with weather disasters, we need to stop insurance companies from increasing insurance costs (commercial and residential). Faster Small Business grant processing and loan processing initiatives. Affordable housing solutions like the one at Eagle County School District in Colorado.
90	Recognizing those businesses that are investing in the types of activities that families are asking for and making those business investment efforts feel appreciated.
91	Partnership with city processes to bring services to Cape Coral as quickly as possible.
92	Faster permit turnaround, list of permits issued monthly.
93	Establish & support the message that business growth is also good for the improving the community's well-being (given that we are "retirement focused" as a general rule).
94	Please help.

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Economic Development Strategic Plan - RCM2342AS

Task 9 Report – Appendices

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September 30, 2024

DCG Corplan
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Cape Coral Executive Airport – Pro Forma

The City of Cape Coral
September 30, 2024

Appendix Exhibit 9.a.1 - City of Cape Coral - Executive Airport	
Executive Summary	
Assumptions	
Inflation rate	2.5%
Holding period	Indefinite
Capitalization rate	8.0%
Cost Analysis - Year 1	
Hard costs	$ 59,355,000
Soft costs	$ 16,029,000
Land acquisiton costs	$ 6,018,000
Total Project Costs	**$ 81,402,000**
Loan Information	
Loan to Value (Predev./Constr.)	85%
Loan to Value (Permanent)	100%
Interest rate -Predev./Constr.	7.50%
Interest rate - Permanent	6.00%
Amortization - Predev./Constr.	2 yrs.
Amortization - Permanent	20 yrs.
Finance origination fee rate	2.0%
Finance costs - Predev./Constr.	$ 1,282,000
Finance costs - Permanent	$ 1,307,000
Loan Amount - Predev./Constr.	$ 65,358,000
Interest on Construction Loan	$ 3,699,000
Loan Amount - Permanent	$ 66,665,000
Annual Debt Service - Permanent	$ 5,812,000
Total Investor Equity	$ 23,076,000
Investor Equity Interest Rate	1.5%
Total Interest on Equity	$ 1,326,000
Total Equity Return	$ 1,326,000
Investor Return on Equity	6%
Equity Payback in Years	7 yrs.
10-yr Cumulative Reserve	$ 16,228,100

Appendix Exhibit 9.a.1 - City of Cape Coral - Executive Airport Concept			
Executive Summary			
Annual Rent Schedule			
Type of Unit	**Units**	**Revenue /Unit**	**Total Rev**
Landing fees (estimated)	1,500 landings	$500.00	**$ 750,000**
Hangar rentals	144,000 sf	$6.60	**$ 950,400**
Aircraft tie-downs	120 aircraft	$1,440.00	**$ 172,800**
Fuel surcharges	Estimated		**$ 174,000**
Flight school admin bldg. lease	24,000 sf	$20 psf	**$ 480,000**
Industrial Park land leases	77 acres	$5,000 per acre	**$ 385,000**
Recreation field rentals	25 sports fields	$5,000 per field	**$ 125,000**
Solar farm (net metering)	7.5 MW	$76,000 per MW	**$ 566,000**
Totals			**$ 3,037,200**
Operating Year 7 - Breakeven			
Gross Scheduled Income			**Revenue**
Airport operations			$ 2,932,000
Industrial park operations			$ 447,000
Recreation fields operations			$ 145,000
Solar farm operations			$ 657,000
Gross Operating Income			**$ 3,524,000**
Less: Operating Expenses			$ (3,862,000)
Less: PILOT			$ (347,000)
Net Operating Income			**$ (685,000)**
Less: Annual Debt service			$ (5,812,000)
Less: Investor Equity Payoff			$ (1,642,900)
Federal Grants			$ 4,639,000
State Grants			$ 2,563,000
Bond Funding			$ 3,480,000
Net Annual Proceeds (Reserve) - Operating Year 7			**$ 2,542,100**

Appendix Exhibit 9.a.2 - City of Cape Coral - Executive Airport

Project Costs - City of Cape Coral			
Land Acquisition	Acreage	Cost/Acre	Total
Parcel A	78.22	$ 82,000	$ 4,815,000
Parcel B	9.77	$ 82,000	$ 469,000
Parcel C	4.77	$ 82,000	$ 367,000
Parcel D	5.00	$ 82,000	$ 367,000
Total Land Acquisition Costs			**$ 6,018,000**
Hard Construction Costs	Unit	$ Cost/unit	Total
Site Clearing	350 acres	2,500 per acre	$ 875,000
Site filling, grading	38 acres	25,000 per acre	$ 950,000
Runway	400,000 sf	15 psf	$ 6,000,000
Taxiways	343,000 sf	10 psf	$ 3,430,000
Jet A self fuel	Estimated		$ 1,500,000
Airport utilities	Estimated		$ 2,500,000
Hangars	144,000 sf	80 psf	$ 11,520,000
Tie-down area	180,000 sf	10 psf	$ 1,800,000
Parking areas	50,000 sf	10 psf	$ 500,000
Administration building	48,000 sf	80 psf	$ 3,840,000
Service road	287,000 sf	10 psf	$ 2,870,000
Entry road	261,000 sf	$ 15	$ 3,915,000
Industrial park utilties	Estimated		$ 2,500,000
Solar farm	7.5 MW	1.08 per watt	$ 8,051,000
Recreation fields	58 acres	100,000 per acre	$ 5,800,000
Water sports preparation	Estimated		$ 150,000
Lighting, signage, misc.	Estimated		$ 300,000
Entry road landscaping	9 acres	3,000 per acre	$ 27,000
Base Building Construction Cost			**$ 56,528,000**
Hard Costs Contingency	5% of hard costs		$ 2,827,000
Subtotal Hard Costs			**$ 59,355,000**
Soft Construction Costs			
Title, Legal	Estimated		$ 100,000
Land surveying	0.5% of hard costs		$ 53,000
Environmental testing	1% of hard costs		$ 594,000
Arch'l/Civil Engineering/Planning/Legal	7% of hard costs		$ 4,155,000
Insurance	2.00% of hard costs		$ 1,187,000
General Contractor Overhead, Profit & Bonding	15% of hard costs		$ 8,903,000
Permit Fees	0.5% of hard costs		$ 297,000
Misc. Inspection Fees	0.02% of hard costs		$ 12,000
Soft Costs Contingency	5% of soft costs		$ 728,000
Subtotal Soft Costs			**$ 16,029,000**
Total Construction Costs - City of Cape Coral			**$ 75,384,000**
Total Project Costs - City of Cape Coral			**$ 81,402,000**

Appendix Exhibit 9.a.3 - City of Cape Coral - Executive Airport			
Project Costs - Others			**Bldgs**
Hard Construction Costs	Unit	$ Cost/unit	Total
Warehouse construction	881,250 sf	50 psf	$ 44,062,500
Flex Buildings construction	293,750 sf	90 psf	$ 26,437,500
Parking lots	1,767,000 sf	10 psf	$ 17,670,000
Lighting, signage, misc.	Estimated		$ 500,000
Base Building Construction Cost			**$ 88,670,000**
Hard Costs Contingency	5% of soft costs		$ 4,433,500
Subtotal Hard Costs			**$ 93,103,500**
Soft Construction Costs			
Title, Legal	Estimated		$ 250,000
Land surveying	0.5% of hard costs		$ 466,000
Environmental testing	1% of hard costs		$ 931,000
Arch'l/Civil Engineering/Planning/Legal	7% of hard costs		$ 6,517,000
Insurance	2.00% of hard costs		$ 1,862,000
General Contractor Overhead, Profit & Bonding	15% of hard costs		$ 13,966,000
Permit Fees	0.5% of hard costs		$ 466,000
Misc. Inspection Fees	0.02% of hard costs		$ 19,000
Soft Costs Contingency	5% of soft costs		$ 4,655,000
Subtotal Soft Costs			**$ 29,132,000**
Total Project Costs - Others			**$ 122,235,500**

Appendix Exhibit 9.a.4 - City of Cape Coral - Executive Airport		
Operating Expenses - City of Cape Coral (estimated)		
Expense	Annual Cost	Percent
Runway, hangar maintenance	$ 750,000	24%
Fuel Farm operations	$ 825,000	26%
Lighting & Utilities	$ 125,000	4%
Airport Administration building	$ 50,000	2%
Industrial Park roads, utilities maintenance	$ 250,000	8%
Recreation fields maintenance	$ 580,000	18%
Marketing & Advertising	$ 25,000	1%
Salaries & wages	$ 566,000	18%
Subtotal Operating Expenses	**$ 3,171,000**	**100%**
Operating Expenses Contingency (5%)	$ 159,000	
Operating Expensese - City of Cape Coral	**$ 3,330,000**	
Pre-Develop Operating Expenses		
Pre-develop Operating Expense Construction yr. 1	25%	
Pre-develop Operating Expense Construction yr. 2	33%	
Total Pre-develop Operating Expense (2 yrs)	**$1,931,000**	

Appendix Exhibit 9.a.5 - City of Cape Coral - Executive Airport Concept				
Pre-Development/Construction (2 yrs.) - City of Cape Coral				
	Item	Investment Equity	Construction Financing	Permanent Financing
Parcel A acquisiton	$ 4,815,000	$ 4,815,000		
Parcel B acquisiton	$ 469,000	$ 469,000		
Parcel C acquisiton	$ 367,000	$ 367,000		
Parcel D acquisiton	$ 367,000	$ 367,000		
Title, Legal	$ 100,000	$ 100,000		
Surveying	$ 53,000		$ 53,000	
Environmental phase 1 testing	$ 594,000		$ 594,000	
Arch'l/Civil Engineering/Planning/Legal	$ 4,155,000		$ 4,155,000	
Insurance	$ 1,187,000		$ 1,187,000	
General Contractor Overhead, Profit & Bonding	$ 8,903,000		$ 8,903,000	
Permit Fees	$ 297,000		$ 297,000	
Misc. Inspection Fees	$ 12,000		$ 12,000	
Soft Costs Contingency	$ 728,000		$ 728,000	
Subtotal PreDevelop costs	**$ 22,047,000**	**$ 6,118,000**	**$ 15,929,000**	
Subtotal Hard Costs	**$ 59,355,000**		**$ 59,355,000**	
Total Construction Cost	**$ 75,384,000**		**$ 75,284,000**	
Construction Loan LTV	85%			
Construction Loan subtotal	$ 64,076,000		$ 64,076,000	
Construction Loan Equity	$ 11,308,000	$ 11,308,000		
Financing Fees - Construction Loan	$ 1,282,000		$ 1,282,000	
Interest on Construction Loan	$ 3,699,000	$ 3,699,000		
Construction Loan total	**$ 65,358,000**	**$ 15,007,000**	**$ 65,358,000**	
Permanent Loan LTV	100%			
Permanent Loan subtotal	$ 65,358,000			$ 65,358,000
Permanent Loan Equity	$ -		$ -	$ -
Financing Fees - Permanent Loan	$ 1,307,000			$ 1,307,000
Permanent Loan total	**$ 66,665,000**		**$ 66,665,000**	**$ 66,665,000**
Annual Debt Service	$ 5,812,000			$ 5,812,000
Net Operating Expenses (2 ys)	$ 1,931,000	$ 1,931,000		
Misc. Predevelop costs (estimate)	$ 20,000	$ 20,000		
Total Investor Equity		**$ 23,076,000**		

Appendix Exhibit 9.a.6 - City of Cape Coral - Executive Airport				
Cash Flows				
Period (Yr.)	**Base**	Optg. Yr. 1	Optg. Yr. 2	Optg. Yr. 3
inflation Factor (2.5%)	**2.5%**	1.00	1.03	1.05
Occupancy Factor		50%	67%	75%
Gross Scheduled Income				
Airport operations	**$ 2,527,200**	$ 1,263,600	$ 1,736,000	$ 1,991,000
Industrial park operations	**$ 385,000**	$ 385,000	$ 395,000	$ 405,000
Recreation fields operations	**$ 125,000**	$ 62,500	$ 86,000	$ 98,000
Solar farm operations	**$566,000**	$566,000	$ 580,000	$ 595,000
Gross Operating Income		**$ 1,711,100**	**$ 2,217,000**	**$ 2,494,000**
Less: Operating Expenses	**$ 3,330,000**	$ (1,665,000)	$ (2,287,000)	$ (2,344,000)
PILOT - Industrial Park	**$ 300,000**	$ (150,000)	$ (206,000)	$ (211,000)
Net Operating Income		**$ (103,900)**	**$ (276,000)**	**$ (61,000)**
Less: Annual Debt Service	**$5,812,000**	$ (5,812,000)	$ (5,812,000)	$ (5,812,000)
Federal Grants	**$ 4,000,000**	$ 4,000,000	$ 4,100,000	$ 4,203,000
State Grants	**$ 2,500,000**	$ 2,500,000	$ 2,563,000	$ 2,563,000
Bond Funding	**$ 3,000,000**	$ 3,000,000	$ 3,075,000	$ 3,152,000
Gross Annual Proceeds		**$ 3,584,100**	**$ 3,650,000**	**$ 4,045,000**
Equity Interest Payment		$ (346,000)	$ (298,000)	$ (247,000)
Equity Principal Payment		$ (3,238,100)	$ (3,352,000)	$ (3,798,000)
Equity Balance	**$ 23,076,000**	$ 19,837,900	$ 16,485,900	$ 12,687,900
Investor Equity Payback		$ (3,584,100)	$ (3,650,000)	$ (4,045,000)
Net Annual Proceeds (Reserve)		$ -	$ -	$ -

Summary	
10-yr Cumulative Reserve	**$ 16,228,100**
Investor Equity Interest Rate	**1.5%**
Total Equity Payback	**$ 23,076,000**
Total Interest on Equity	**$ 1,326,000**
Total Equity Return	**$ 24,402,000**
Investor Return on Equity	**6%**
Equity Payback in Years	**7**

Appendix Exhibit 9.a.6 - City of Cape Coral - Executive Airport				
Cash Flows				
Period (Yr.)	**Base**	Optg. Yr. 4	Optg. Yr. 5	Optg. Yr. 6
inflation Factor (2.5%)	**2.5%**	1.08	1.10	1.13
Occupancy Factor		100%	100%	100%
Gross Scheduled Income				
Airport operations	**$ 2,527,200**	$ 2,722,000	$ 2,790,000	$ 2,860,000
Industrial park operations	**$ 385,000**	$ 415,000	$ 425,000	$ 436,000
Recreation fields operations	**$ 125,000**	$ 135,000	$ 138,000	$ 141,000
Solar farm operations	**$566,000**	$ 610,000	$ 625,000	$ 641,000
Gross Operating Income		**$ 3,272,000**	**$ 3,353,000**	**$ 3,437,000**
Less: Operating Expenses	**$ 3,330,000**	$ (3,586,000)	$ (3,676,000)	$ (3,768,000)
PILOT - Industrial Park	**$ 300,000**	$ (323,000)	$ (331,000)	$ (339,000)
Net Operating Income		**$ (637,000)**	**$ (654,000)**	**$ (670,000)**
Less: Annual Debt Service	**$5,812,000**	$ (5,812,000)	$ (5,812,000)	$ (5,812,000)
Federal Grants	**$ 4,000,000**	$ 4,308,000	$ 4,416,000	$ 4,526,000
State Grants	**$ 2,500,000**	$ 2,563,000	$ 2,563,000	$ 2,563,000
Bond Funding	**$ 3,000,000**	$ 3,231,000	$ 3,312,000	$ 3,395,000
Gross Annual Proceeds		**$ 3,653,000**	**$ 3,825,000**	**$ 4,002,000**
Equity Interest Payment		$ (190,000)	$ (138,000)	$ (83,000)
Equity Principal Payment		$ (3,463,000)	$ (3,687,000)	$ (3,919,000)
Equity Balance	**$ 23,076,000**	$ 9,224,900	$ 5,537,900	$ 1,618,900
Investor Equity Payback		$ (3,653,000)	$ (3,825,000)	$ (4,002,000)
Net Annual Proceeds (Reserve)		**$ -**	**$ -**	**$ -**
Summary				
10-yr Cumulative Reserve	**$ 16,228,100**			
Investor Equity Interest Rate	**1.5%**			
Total Equity Payback	**$ 23,076,000**			
Total Interest on Equity	**$ 1,326,000**			
Total Equity Return	**$ 24,402,000**			
Investor Return on Equity	**6%**			
Equity Payback in Years	**7**			

Appendix Exhibit 9.a.6 - City of Cape Coral - Executive Airport				
Cash Flows				
Period (Yr.)	**Base**	Optg. Yr. 7	Optg. Yr. 8	Optg. Yr. 9
inflation Factor (2.5%)	**2.5%**	1.16	1.19	1.22
Occupancy Factor		100%	100%	100%
Gross Scheduled Income				
Airport operations	**$ 2,527,200**	$ 2,932,000	$ 3,005,000	$ 3,080,000
Industrial park operations	**$ 385,000**	$ 447,000	$ 458,000	$ 469,000
Recreation fields operations	**$ 125,000**	$ 145,000	$ 149,000	$ 153,000
Solar farm operations	**$566,000**	$ 657,000	$ 673,000	$ 690,000
Gross Operating Income		**$ 3,524,000**	**$ 3,612,000**	**$ 3,702,000**
Less: Operating Expenses	**$ 3,330,000**	$ (3,862,000)	$ (3,959,000)	$ (4,058,000)
PILOT - Industrial Park	**$ 300,000**	$ (347,000)	$ (356,000)	$ (365,000)
Net Operating Income		**$ (685,000)**	**$ (703,000)**	**$ (721,000)**
Less: Annual Debt Service	**$5,812,000**	$ (5,812,000)	$ (5,812,000)	$ (5,812,000)
Federal Grants	**$ 4,000,000**	$ 4,639,000	$ 4,755,000	$ 4,874,000
State Grants	**$ 2,500,000**	$ 2,563,000	$ 2,563,000	$ 2,563,000
Bond Funding	**$ 3,000,000**	$ 3,480,000	$ 3,567,000	$ 3,656,000
Gross Annual Proceeds		**$ 4,185,000**	**$ 4,370,000**	**$ 4,560,000**
Equity Interest Payment		$ (24,000)	$ -	$ -
Equity Principal Payment		$ (1,618,900)	$ -	$ -
Equity Balance	**$ 23,076,000**	$ -	$ -	$ -
Investor Equity Payback		$ (1,642,900)	$ -	$ -
Net Annual Proceeds (Reserve)		**$ 2,542,100**	**$ 4,370,000**	**$ 4,560,000**
Summary				
10-yr Cumulative Reserve	**$ 16,228,100**			
Investor Equity Interest Rate	**1.5%**			
Total Equity Payback	**$ 23,076,000**			
Total Interest on Equity	**$ 1,326,000**			
Total Equity Return	**$ 24,402,000**			
Investor Return on Equity	**6%**			
Equity Payback in Years	**7**			

Appendix Exhibit 9.a.6 - City of Cape Coral - Executive Airport		
Cash Flows		
Period (Yr.)	**Base**	Optg. Yr. 10
inflation Factor (2.5%)	**2.5%**	1.25
Occupancy Factor		100%
Gross Scheduled Income		
Airport operations	**$ 2,527,200**	$ 3,157,000
Industrial park operations	**$ 385,000**	$ 481,000
Recreation fields operations	**$ 125,000**	$ 157,000
Solar farm operations	**$566,000**	$ 707,000
Gross Operating Income		**$ 3,795,000**
Less: Operating Expenses	**$ 3,330,000**	$ (4,159,000)
PILOT - Industrial Park	**$ 300,000**	$ (374,000)
Net Operating Income		**$ (738,000)**
Less: Annual Debt Service	**$5,812,000**	$ (5,812,000)
Federal Grants	**$ 4,000,000**	$ 4,996,000
State Grants	**$ 2,500,000**	$ 2,563,000
Bond Funding	**$ 3,000,000**	$ 3,747,000
Gross Annual Proceeds		**$ 4,756,000**
Equity Interest Payment		$ -
Equity Principal Payment		$ -
Equity Balance	**$ 23,076,000**	$ -
Investor Equity Payback		$ -
Net Annual Proceeds (Reserve)		**$ 4,756,000**
Summary		
10-yr Cumulative Reserve	**$ 16,228,100**	
Investor Equity Interest Rate	**1.5%**	
Total Equity Payback	**$ 23,076,000**	
Total Interest on Equity	**$ 1,326,000**	
Total Equity Return	**$ 24,402,000**	
Investor Return on Equity	**6%**	
Equity Payback in Years	**7**	

DCG Corplan
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Cape Coral Corporate Park – Pro Forma

The City of Cape Coral
September 30, 2024

Appendix Exhibit 9.b.1 - Cape Coral Corporate Park		
Executive Summary		
Assumptions		
Inflation rate		2.5%
Holding period		Indefinite
Capitalization rate		8.0%
Hotel occupancy rate		70%
Cost Analysis - Year 1		
Hard costs	$	42,545,000
Soft costs	$	11,643,000
Total Project Costs	**$**	**54,188,000**
Loan Information		
Loan to Value (Predev./Constr.)		85%
Loan to Value (Permanent)		100%
Interest rate -Predev./Constr.		7.50%
Interest rate - Permanent		6.00%
Amortization - Predev./Constr.		2 yrs.
Amortization - Permanent		20 yrs.
Finance origination fee rate		2.0%
Finance costs - Predev./Constr.	$	921,000
Finance costs - Permanent	$	940,000
Loan Amount - Predev./Constr.	$	46,981,000
Interest on Construction Loan	$	2,659,000
Loan Amount - Permanent	$	47,921,000
Annual Debt Service - Permanent	$	4,178,000
Total Investor Equity	$	11,690,000
Investor Equity Interest Rate		1.5%
Total Interest on Equity	$	782,000
Total Equity Return	$	12,472,000
Investor Return on Equity		7%
Equity Payback in Years		8 yrs.
10-yr Cumulative Reserve	$	4,671,500

Appendix Exhibit 9.b.1 - Cape Coral Corporate Park			
Executive Summary			
Annual Rent Schedule			
Type of Unit	**Units**	**Revenue /Unit**	**Total Rent**
Corporate Park land leases	101 acres	$10,000 per acre	**$ 1,014,000**
Pavilion Building - partials[pace rental	5,150 sf	$25 per sf	**$ 129,000**
Solar farm (net metering)	1.5 MW	$76,000 per MW	**$ 112,000**
E-Scooter Revenue	100	$6,000	**$ 600,000**
Totals			**$ 1,855,000**
Operating Year 8 - Breakeven			
Gross Scheduled Income			
Corporate Park operations			$ 1,205,000
Pavilion Building operations			$ 154,000
Solar farm operations			$ 133,000
E-Scooter operations			$ 713,000
Gross Operating Income			**$ 2,205,000**
Less: Operating Expenses			$ (2,999,000)
Less: PILOT			$ (297,000)
Net Operating Income			**$ (1,091,000)**
Less: Annual Debt service			$ (4,178,000)
Bond Funding			$ 7,134,000
Less: Investor Equity Payoff			$ (1,379,500)
Net Annual Proceeds (Reserve) - Operating Year 8			**$ 485,500**

Appendix Exhibit 9.b.2 - Cape Coral Corporate Park			
Project Costs - City of Cape Coral			
Hard Construction Costs	Unit	$ Cost/unit	Total
Site Clearing	120.8 acres	2,500 per acre	$ 302,000
Site filling, grading	19.5 acres	25,000 per acre	$ 487,000
Roadways	445,000 sf	15 per sf	$ 6,675,000
Permeable Parking areas	50,000 sf	12 psf	$ 600,000
Sidewalks	61,000 sf	10 psf	$ 610,000
Bio-retention Landscaping	4.3 acres	125,000 per acre	$ 533,000
Pavilion Building	10,300 sf	215 psf	$ 2,215,000
Utilities	Estimated		$ 25,000,000
Solar farm	1.5 MW	1.08 per watt	$ 1,597,000
Lighting, signage, misc.	Estimated		$ 2,500,000
Base Building Construction Cost			**$ 40,519,000**
Hard Costs Contingency	5% of hard costs		$ 2,026,000
Subtotal Hard Costs			**$ 42,545,000**
Soft Construction Costs			
Title, Legal	Estimated		$ 50,000
Land surveying	0.5% of hard costs		$ 213,000
Environmental testing	1% of hard costs		$ 425,000
Arch'l/Civil Engineering/Planning/Legal	7% of hard costs		$ 2,978,000
Insurance	2% of hard costs		$ 851,000
General Contractor Overhead, Profit & Bonding	15% of hard costs		$ 6,382,000
Permit Fees	0.5% of hard costs		$ 213,000
Misc. Inspection Fees	0.02% of hard costs		$ 9,000
Soft Costs Contingency	5% of soft costs		$ 522,000
Subtotal Soft Costs			**$ 11,643,000**
Total Project Costs - City of Cape Coral			**$ 54,188,000**

Appendix Exhibit 9.b.3 - Cape Coral Corporate Park			
Project Costs - Others			
Hard Construction Costs	Unit	$ Cost/unit	Total
Office Construction	740,000 sf	85 psf	$ 62,900,000
Warehouses Construction	627,200 sf	50 psf	$ 31,360,000
Flex bldgs constructon	225,000 sf	95 psf	$ 21,375,000
Parking lots	458,175 sf	10 psf	$ 4,582,000
Lighting, signage, misc.	Estimated		$ 750,000
Base Building Construction Cost			**$ 120,967,000**
Hard Costs Contingency	5% of hard costs		$ 6,048,000
Subtotal Hard Costs			**$ 127,015,000**
Soft Construction Costs			
Title, Legal	Estimated		$ 25,000
Land surveying	0.5% of hard costs		$ 635,000
Environmental testing	1% of hard costs		$ 1,270,000
Arch'l/Civil Engineering/Plannin	7% of hard costs		$ 8,891,000
Insurance	2.00% of hard costs		$ 2,540,000
General Contractor Overhead, F	15% of hard costs		$ 19,052,000
Permit Fees	0.5% of hard costs		$ 635,000
Misc. Inspection Fees	0.02% of hard costs		$ 25,000
Soft Costs Contingency	5% of soft costs		$ 1,654,000
Subtotal Soft Costs			**$ 34,727,000**
Total Project Costs - Others			**$ 161,742,000**

Appendix Exhibit 9.b.4 - Cape Coral Corporate Park

Operating Expenses - City of Cape Coral (estimated)		
Expense	**Annual Cost**	**Percent**
Roadways maintenance	$ 248,000	10%
Biorentention maintenace	$ 46,000	2%
Utilities maintenece (estimated)	$ 125,000	5%
E-Scooter leases	$ 18,000	1%
Pavilion Building maintenance	$ 16,000	1%
Salaries	$1,950,000	81%
Subtotal Operating Expenses	**$ 2,403,000**	**100%**
Operating Expenses Contingency (5%)	$ 120,000	
Operating Expensese - City of Cape Coral	**$ 2,523,000**	
Pre-Develop Operating Expenses		
Pre-develop Operating Expense Construction yr. 1	25%	
Pre-develop Operating Expense Construction yr. 2	33%	
Total Pre-develop Operating Expense (2 yrs)	**$833,000**	

Appendix Exhibit 9.b.5 - Cape Coral Corporate Park				
Pre-Development/Construction - City of Cape Coral (2 yrs.)				
	Item	Investment Equity	Construction Financing	Permanent Financing
Title, Legal	$ 50,000	$ 50,000		
Surveying	$ 213,000		$ 213,000	
Environmental phase 1 testing	$ 425,000		$ 425,000	
Arch'l/Civil Engineering/Planning/Legal	$ 2,978,000		$ 2,978,000	
Insurance	$ 851,000		$ 851,000	
General Contractor Overhead, Profit & Bonding	$ 6,382,000		$ 6,382,000	
Permit Fees	$ 213,000		$ 213,000	
Misc. Inspection Fees	$ 9,000		$ 9,000	
Soft Costs Contingency	$ 522,000		$ 522,000	
Subtotal PreDevelop costs	**$ 11,643,000**	**$ 50,000**	**$ 11,593,000**	
Subtotal Hard Costs	**$ 42,545,000**		**$ 42,545,000**	
Total Construction Cost	**$ 54,188,000**		**$ 54,138,000**	
Construction Loan LTV	85%			
Construction Loan subtotal	$ 46,060,000		$ 46,060,000	
Construction Loan Equity	$ 8,128,000	$ 8,128,000		
Financing Fees - Construction Loan	$ 921,000		$ 921,000	
Interest on Construction Loan	$ 2,659,000	$ 2,659,000		
Construction Loan total	**$ 46,981,000**	**$ 10,787,000**	**$ 46,981,000**	
Permanent Loan LTV	100%			
Permanent Loan subtotal	$ 46,981,000			$ 46,981,000
Permanent Loan Equity	$ -		$ -	$ -
Financing Fees - Permanent Loan	$ 940,000			$ 940,000
Permanent Loan total	**$ 47,921,000**		**$ 47,921,000**	**$ 47,921,000**
Annual Debt Service	$ 4,178,000			$ 4,178,000
Net Operating Expenses (2 ys)	$ 833,000	$ 833,000		
Misc. Predevelop costs (estimate)	$ 20,000	$ 20,000		
Total Investor Equity	**$ 11,690,000**	**$ 11,690,000**		

Appendix Exhibit 9.b.6 - Cape Coral Corporate Park				
Cash Flows				
Period (Yr.)		Optg. Yr. 1	Optg. Yr. 2	Optg. Yr. 3
inflation Factor (2.5%)	**2.5%**	1.00	1.03	1.05
Occupancy Factor		50%	67%	75%
Gross Scheduled Income				
Corporate Park operations	**$ 1,014,000**	$ 1,014,000	$ 1,039,000	$ 1,065,000
Pavilion Building operations	**$ 129,000**	$ 65,000	$ 89,000	$ 102,000
Solar farm operations	**$ 112,000**	$ 112,000	$ 115,000	$ 118,000
E-Scooter operations	**$ 600,000**	$ 300,000	$ 412,000	$ 473,000
Gross Operating Income	**$ 1,855,000**	**$ 1,491,000**	**$ 1,655,000**	**$ 1,758,000**
Less: Operating Expenses	**$ 2,523,000**	$ (1,261,500)	$ (1,733,000)	$ (1,988,000)
PILOT - Corporate Park	**$ 500,000**	$ (250,000)	$ (256,000)	$ (262,000)
Net Operating Income		**$ (20,500)**	**$ (334,000)**	**$ (492,000)**
Less: Annual Debt Service	**$4,178,000**	$ (4,178,000)	$ (4,178,000)	$ (4,178,000)
Bond Funding	**$ 6,000,000**	$ 6,000,000	$ 6,150,000	$ 6,304,000
Gross Annual Proceeds		**$ 1,801,500**	**$ 1,638,000**	**$ 1,634,000**
Equity Interest Payment		$ (175,000)	$ (151,000)	$ (129,000)
Equity Principal Payment		$ (1,626,500)	$ (1,487,000)	$ (1,505,000)
Equity Balance	**$ 11,690,000**	$ 10,063,500	$ 8,576,500	$ 7,071,500
Investor Equity Payback		$ (1,801,500)	$ (1,638,000)	$ (1,634,000)
Net Annual Proceeds (Reserve)		**$ -**	**$ -**	**$ -**
Summary				
10-yr Cumulative Reserve	**$ 4,671,500**			
Investor Equity Interest Rate	**1.5%**			
Total Equity Payback	**$ 11,690,000**			
Total Interest on Equity	**$ 782,000**			
Total Equity Return	**$ 12,472,000**			
Investor Return on Equity	**7%**			
Equity Payback in Years	**8**			

Appendix Exhibit 9.b.6 - Cape Coral Corporate Park				
Cash Flows				
Period (Yr.)		Optg. Yr. 4	Optg. Yr. 5	Optg. Yr. 6
inflation Factor (2.5%)	**2.5%**	1.08	1.10	1.13
Occupancy Factor		100%	100%	100%
Gross Scheduled Income				
Corporate Park operations	**$ 1,014,000**	$ 1,092,000	$ 1,119,000	$ 1,147,000
Pavilion Building operations	**$ 129,000**	$ 139,000	$ 142,000	$ 146,000
Solar farm operations	**$ 112,000**	$ 121,000	$ 124,000	$ 127,000
E-Scooter operations	**$ 600,000**	$ 646,000	$ 662,000	$ 679,000
Gross Operating Income	**$ 1,855,000**	**$ 1,998,000**	**$ 2,047,000**	**$ 2,099,000**
Less: Operating Expenses	**$ 2,523,000**	$ (2,717,000)	$ (2,785,000)	$ (2,855,000)
PILOT - Corporate Park	**$ 500,000**	$ (269,000)	$ (276,000)	$ (283,000)
Net Operating Income		**$ (988,000)**	**$ (1,014,000)**	**$ (1,039,000)**
Less: Annual Debt Service	**$4,178,000**	$ (4,178,000)	$ (4,178,000)	$ (4,178,000)
Bond Funding	**$ 6,000,000**	$ 6,462,000	$ 6,624,000	$ 6,790,000
Gross Annual Proceeds		**$ 1,296,000**	**$ 1,432,000**	**$ 1,573,000**
Equity Interest Payment		$ (106,000)	$ (88,000)	$ (68,000)
Equity Principal Payment		$ (1,190,000)	$ (1,344,000)	$ (1,505,000)
Equity Balance	**$ 11,690,000**	$ 5,881,500	$ 4,537,500	$ 3,032,500
Investor Equity Payback		$ (1,296,000)	$ (1,432,000)	$ (1,573,000)
Net Annual Proceeds (Reserve)		**$ -**	**$ -**	**$ -**
Summary				
10-yr Cumulative Reserve	$ 4,671,500			
Investor Equity Interest Rate	1.5%			
Total Equity Payback	$ 11,690,000			
Total Interest on Equity	$ 782,000			
Total Equity Return	$ 12,472,000			
Investor Return on Equity	7%			
Equity Payback in Years	8			

Appendix Exhibit 9.b.6 - Cape Coral Corporate Park				
Cash Flows				
Period (Yr.)		Optg. Yr. 7	Optg. Yr. 8	Optg. Yr. 9
inflation Factor (2.5%)	**2.5%**	1.16	1.19	1.22
Occupancy Factor		100%	100%	100%
Gross Scheduled Income				
Corporate Park operations	**$ 1,014,000**	$ 1,176,000	$ 1,205,000	$ 1,235,000
Pavilion Building operations	**$ 129,000**	$ 150,000	$ 154,000	$ 158,000
Solar farm operations	**$ 112,000**	$ 130,000	$ 133,000	$ 136,000
E-Scooter operations	**$ 600,000**	$ 696,000	$ 713,000	$ 731,000
Gross Operating Income	**$ 1,855,000**	**$ 2,152,000**	**$ 2,205,000**	**$ 2,260,000**
Less: Operating Expenses	**$ 2,523,000**	$ (2,926,000)	$ (2,999,000)	$ (3,074,000)
PILOT - Corporate Park	**$ 500,000**	$ (290,000)	$ (297,000)	$ (304,000)
Net Operating Income		**$ (1,064,000)**	**$ (1,091,000)**	**$ (1,118,000)**
Less: Annual Debt Service	**$4,178,000**	$ (4,178,000)	$ (4,178,000)	$ (4,178,000)
Bond Funding	**$ 6,000,000**	$ 6,960,000	$ 7,134,000	$ 7,312,000
Gross Annual Proceeds		**$ 1,718,000**	**$ 1,865,000**	**$ 2,016,000**
Equity Interest Payment		$ (45,000)	$ (20,000)	$ -
Equity Principal Payment		$ (1,673,000)	$ (1,359,500)	$ -
Equity Balance	**$ 11,690,000**	$ 1,359,500	$ -	$ -
Investor Equity Payback		$ (1,718,000)	$ (1,379,500)	$ -
Net Annual Proceeds (Reserve)		**$ -**	**$ 485,500**	**$ 2,016,000**
Summary				
10-yr Cumulative Reserve	**$ 4,671,500**			
Investor Equity Interest Rate	**1.5%**			
Total Equity Payback	**$ 11,690,000**			
Total Interest on Equity	**$ 782,000**			
Total Equity Return	**$ 12,472,000**			
Investor Return on Equity	**7%**			
Equity Payback in Years	**8**			

Appendix Exhibit 9.b.6 - Cape Coral Corporate Park		
Cash Flows		
Period (Yr.)		Optg. Yr. 10
inflation Factor (2.5%)	**2.5%**	1.25
Occupancy Factor		100%
Gross Scheduled Income		
Corporate Park operations	**$ 1,014,000**	$ 1,266,000
Pavilion Building operations	**$ 129,000**	$ 162,000
Solar farm operations	**$ 112,000**	$ 139,000
E-Scooter operations	**$ 600,000**	$ 749,000
Gross Operating Income	**$ 1,855,000**	**$ 2,316,000**
Less: Operating Expenses	**$ 2,523,000**	$ (3,151,000)
PILOT - Corporate Park	**$ 500,000**	$ (312,000)
Net Operating Income		**$ (1,147,000)**
Less: Annual Debt Service	**$4,178,000**	$ (4,178,000)
Bond Funding	**$ 6,000,000**	$ 7,495,000
Gross Annual Proceeds		**$ 2,170,000**
Equity Interest Payment		$ -
Equity Principal Payment		$ -
Equity Balance	**$ 11,690,000**	$ -
Investor Equity Payback		$ -
Net Annual Proceeds (Reserve)		**$ 2,170,000**
Summary		
10-yr Cumulative Reserve	$ 4,671,500	
Investor Equity Interest Rate	**1.5%**	
Total Equity Payback	**$ 11,690,000**	
Total Interest on Equity	**$ 782,000**	
Total Equity Return	**$ 12,472,000**	
Investor Return on Equity	**7%**	
Equity Payback in Years	**8**	

Downtown Civic Center & Entertainment District – Pro Forma

The City of Cape Coral
September 30, 2024

Appendix Exhibit 9.c.1 - Downtown Civic Center & Enter. Distrct.	
Executive Summary	
Assumptions	
Inflation rate	2.5%
Holding period	Indefinite
Capitalization rate	8.0%
Cost Analysis - Year 1	
Hard costs	$ 91,029,000
Soft costs	$ 25,394,000
Land acquisiton costs	$ 15,363,000
Total Project Costs	**$ 131,786,000**
Loan Information	
Loan to Value (Predev./Constr.)	85%
Loan to Value (Permanent)	100%
Interest rate -Predev./Constr.	7.50%
Interest rate - Permanent	6.00%
Amortization - Predev./Constr.	2 yrs.
Amortization - Permanent	20 yrs.
Finance origination fee rate	2.0%
Finance costs - Predev./Constr.	$ 1,979,000
Finance costs - Permanent	$ 2,019,000
Loan Amount - Predev./Constr.	$ 100,939,000
Interest on Construction Loan	$ 5,713,000
Loan Amount - Permanent	$ 102,958,000
Annual Debt Service - Permanent	$ 8,976,000
Total Investor Equity	$ 50,002,000
Investor Equity Interest Rate	1.5%
Total Interest on Equity	$ 3,814,000
Total Equity Return	$ 1,326,000
Investor Return on Equity	8%
Equity Payback in Years	8 yrs.
10-yr Cumulative Reserve	$ 30,050,000

Appendix Exhibit 9.c.1 - Downtown Civic Center & Enter. Distrct.

Executive Summary			
Annual Rent Schedule			
Type of Unit	**Unit**	**Rev/Unit**	**Total Rev**
Food & Beverage revenue	100 events	$ 144,000	**$ 14,400,000**
Facility rental revenue	100 events	$ 111,000	**$ 11,100,000**
Event Services revenue	100 events	$ 42,000	**$ 4,200,000**
Parking revenue	100 events	$ 4,650	**$ 465,000**
Entertainment District area land leases	4.5 acres	$75,000 per acre	**$ 340,000**
Totals			**$ 30,505,000**
Operating Year 8 - Breakeven			
Gross Scheduled Income			
Food & Beverage Operations			$ 17,116,000
Facility rental Operations			$ 13,194,000
Event Service operations			$ 4,993,000
Parking operations			$ 554,000
Entertainment Distrcit land leases			$ 405,000
Gross Operating Income			**$ 35,303,000**
Less: Operating Expenses			$ (22,428,000)
Less: PILOT			$ (356,000)
Net Operating Income			**$ 12,519,000**
Less: Annual Debt service			$ (8,976,000)
Less: Investor Equity Payoff			$ (3,464,000)
State Grants			$ 2,378,000
Bond Funding			$ 4,755,000
Net Annual Proceeds (Reserve) - Operating Year 8			**$ 7,212,000**

Appendix Exhibit 9.c.2 - Downtown Civic Center & Enter. Distrct.

Project Costs - City of Cape Coral			
Land Acquisition		Acreage	Total
Parcel A		4.27	$ 4,200,000
Parcel B		0.61	$ 810,000
Parcel C		0.85	$ 529,000
Parcel D		0.67	$ 836,000
Parcel E		0.33	$ 144,000
Parcel F		0.34	$ 144,000
Parcel G		1.03	$ 1,731,000
Parcel H		0.35	$ 681,000
Parcel I		0.58	$ 1,183,000
Parcel J		0.46	$ 403,000
Parcel K		0.23	$ 536,000
Parcel L		0.23	$ 536,000
Parcel M		0.23	$ 535,000
Parcel N		0.23	$ 475,000
Parcel O		0.23	$ 587,000
Parcel P		0.23	$ 457,000
Parcel Q		0.33	$ 754,000
Parcel R		0.41	$ 822,000
Total Land Acquisition Costs		**11.6**	**$ 15,363,000**
Hard Construction Costs	Unit	$ Cost/unit	Total
Site Clearing	11.6 acres	15,000 per acre	$ 174,000
Site filling, grading	11.6 acres	25,000 per acre	$ 290,000
Civic Center	196,400 sf	300 psf	$ 58,920,000
Plaza	98,900 sf	20 psf	$ 1,978,000
Parking garage	740 spaces	30,000 per space	$ 22,200,000
Pedestrian bridge	5,500 sf	150 sf	$ 825,000
Landscaping	121,300 sf	5 sf	$ 607,000
Lighting, signange ,misc	Estimated		$ 1,700,000
Base Building Construction Cost			**$ 86,694,000**
Hard Costs Contingency	5% of hard costs		$ 4,335,000
Subtotal Hard Costs			**$ 91,029,000**

Soft Construction Costs			
Title, Legal	Estimated	$	500,000
Land surveying	0.5% of hard costs	$	455,000
Environmental testing	1% of hard costs	$	910,000
Arch'l/Civil Engineering/Planning/Legal	7% of hard costs	$	6,372,000
Insurance	2.00% of hard costs	$	1,821,000
General Contractor Overhead, Profit & Bonding	15% of hard costs	$	13,654,000
Permit Fees	0.5% of hard costs	$	455,000
Misc. Inspection Fees	0.02% of hard costs	$	18,000
Soft Costs Contingency	5% of soft costs	$	1,209,000
Subtotal Soft Costs		**$**	**25,394,000**
Total Construction Costs		**$**	**116,423,000**
Total Land Acquisition Costs		**$**	**15,363,000**
Total Project Costs		**$**	**131,786,000**

Appendix Exhibit 9.c.3 - Downtown Civic Center & Enter. Distrct.			
Project Costs - by Others			
Hard Construction Costs	Unit	$ Cost/unit	Total
Entertainment bldgs.	90,800 sf	125 sf	$ 11,350,000
Esplanade	71,100 sf	20 sf	$ 1,422,000
Drive aisles	46,200 sf	15 per sf	$ 693,000
Permeable Parking areas	29,400 sf	12 psf	$ 353,000
Footbridge	1,200 sf	150 sf	$ 180,000
Landscaping	36,900 sf	5 sf	$ 185,000
Lighting, signange ,misc	Estimated		$ 300,000
Base Building Construction Cost			**$ 14,483,000**
Hard Costs Contingency	5% of hard costs		$ 724,000
Subtotal Hard Costs			**$ 15,207,000**
Soft Construction Costs			
Title, Legal	Estimated		$ 500,000
Land surveying	0.5% of hard costs		$ 76,000
Environmental testing	1% of hard costs		$ 152,000
Arch'l/Civil Engineering/Planning/Legal	7% of hard costs		$ 1,064,000
Insurance	2.00% of hard costs		$ 304,000
General Contractor Overhead, Profit & Bonding	15% of hard costs		$ 2,281,000
Permit Fees	0.5% of hard costs		$ 76,000
Misc. Inspection Fees	0.02% of hard costs		$ 3,000
Soft Costs Contingency	5% of soft costs		$ 223,000
Subtotal Soft Costs			**$ 4,679,000**
Total Project Costs			**$ 19,886,000**

Appendix Exhibit 9.c.4 - Downtown Civic Center & Enter. Distrct.		
Operating Expenses - City of Cape Coral (estimated)		
Expense	Annual Cost	Percent
Buildings maintenance	$ 582,000	3%
Landscape maitenanace	$ 12,000	0%
Utilities (estimated)	$ 3,000,000	17%
Marketing & Advertising	$ 350,000	2%
Salaries & wages	$ 14,025,000	78%
Subtotal Operating Expenses	**$ 17,969,000**	**100%**
Operating Expenses Contingency (5%)	$ 898,000	
Operating Expensese - City of Cape Coral	**$ 18,867,000**	
Pre-Develop Operating Expenses		
Pre-develop Operating Expense Construction yr. 1	25%	
Pre-develop Operating Expense Construction yr. 2	33%	
Total Pre-develop Operating Expense (2 yrs)	**$10,943,000**	

Appendix Exhibit 9.c.5 - Downtown Civic Center & Enter. District

Pre-Development/Construction (2 yrs.) - City of Cape Coral				
	Item	Investment Equity	Construction Financing	Permanent Financing
Parcels A-F acquistion	$ 6,663,000	$ 6,663,000		
Parcels G-R acquisiton	$ 8,700,000	$ 8,700,000		
Title, Legal	$ 500,000	$ 500,000		
Land surveying	$ 455,000		$ 455,000	
Environmental testing	$ 910,000		$ 910,000	
Arch'l/Civil Engineering/Planning/Legal	$ 6,372,000		$ 6,372,000	
Insurance	$ 1,821,000		$ 1,821,000	
General Contractor Overhead, Profit & Bonding	$ 13,654,000		$ 13,654,000	
Permit Fees	$ 455,000		$ 455,000	
Misc. Inspection Fees	$ 18,000		$ 18,000	
Soft Costs Contingency	$ 1,209,000		$ 1,209,000	
Subtotal PreDevelop costs	**$ 40,757,000**	**$ 15,863,000**	**$ 24,894,000**	
Subtotal Hard Costs	**$ 91,029,000**		**$ 91,029,000**	
Total Construction Cost	**$ 116,423,000**		**$ 115,923,000**	
Construction Loan LTV	85%			
Construction Loan subtotal	$ 98,960,000		$ 98,960,000	
Construction Loan Equity	$ 17,463,000	**$ 17,463,000**		
Financing Fees - Construction Loan	$ 1,979,000		$ 1,979,000	
Interest on Construction Loan	$ 5,713,000	$ 5,713,000		
Construction Loan total	**$ 100,939,000**	**$ 23,176,000**	**$ 100,939,000**	
Permanent Loan LTV	100%			
Permanent Loan subtotal	$ 100,939,000			$ 100,939,000
Permanent Loan Equity	$ -		$ -	$ -
Financing Fees - Permanent Loan	$ 2,019,000			$ 2,019,000
Permanent Loan total	**$ 102,958,000**		**$ 102,958,000**	**$ 102,958,000**
Annual Debt Service	$ 8,976,000			$ 8,976,000
Net Operating Expenses (2 ys)	$ 10,943,000	$ 10,943,000		
Misc. Predevelop costs (estimate)	$ 20,000	$ 20,000		
Total Investor Equity	**$ 50,002,000**	**$ 50,002,000**		

Appendix Exhibit 9.a.6 - Downtown Civic Center & Enter. District

Cash Flows

Period (Yr.)	Base	Optg. Yr. 1	Optg. Yr. 2	Optg. Yr. 3
inflation Factor (2.5%)	2.5%	1.00	1.03	1.05
Occupancy Factor		50%	67%	75%
Gross Scheduled Income				
Food & Beverage Operations	$ 14,400,000	$ 7,200,000	$ 9,889,000	$ 11,347,000
Facility rental Operations	$ 11,100,000	$ 5,550,000	$ 7,623,000	$ 8,746,000
Event Service operations	$ 4,200,000	$ 2,100,000	$ 2,884,000	$ 3,309,000
Parking operations	$ 465,000	$ 232,500	$ 319,000	$ 366,000
Entertainment Distrcit land leases	$ 340,000	$ 340,000	$ 349,000	$ 358,000
Gross Operating Income		$ 14,850,000	$ 20,396,000	$ 23,402,000
Less: Operating Expenses	$ 18,867,000	$ (9,434,000)	$ (12,957,000)	$ (14,867,000)
PILOT -Entetainment District area	$ 300,000	$ (150,000)	$ (206,000)	$ (236,000)
Net Operating Income		$ 5,266,000	$ 7,233,000	$ 8,299,000
Less: Annual Debt Service	$ 8,976,000	$ (8,976,000)	$ (8,976,000)	$ (8,976,000)
State Grants	$ 2,000,000	$ 2,000,000	$ 2,050,000	$ 2,101,000
Bond Funding	$ 4,000,000	$ 4,000,000	$ 4,100,000	$ 4,203,000
Gross Annual Proceeds		$ 2,290,000	$ 4,407,000	$ 5,627,000
Equity Interest Payment		$ (750,000)	$ (727,000)	$ (672,000)
Equity Principal Payment		$ (1,540,000)	$ (3,680,000)	$ (4,955,000)
Equity Balance	$ 50,002,000	$ 48,462,000	$ 44,782,000	$ 39,827,000
Investor Equity Payback		$ (2,290,000)	$ (4,407,000)	$ (5,627,000)
Net Annual Proceeds (Reserve)		$ -	$ -	$ -
Summary				
10-yr Cumulative Reserve	$ 30,050,000			
Investor Equity Interest Rate	1.5%			
Total Equity Payback	$ 50,002,000			
Total Interest on Equity	$ 3,814,000			
Total Equity Return	$ 53,816,000			
Investor Return on Equity	8%			
Equity Payback in Years	8			

Appendix Exhibit 9.a.6 - Downtown Civic Center & Enter. District				
Cash Flows				
Period (Yr.)	**Base**	Optg. Yr. 4	Optg. Yr. 5	Optg. Yr. 6
inflation Factor (2.5%)	**2.5%**	1.08	1.10	1.13
Occupancy Factor		100%	100%	100%
Gross Scheduled Income				
Food & Beverage Operations	**$ 14,400,000**	$ 15,507,000	$ 15,895,000	$ 16,292,000
Facility rental Operations	**$ 11,100,000**	$ 11,953,000	$ 12,252,000	$ 12,558,000
Event Service operations	**$ 4,200,000**	$ 4,523,000	$ 4,636,000	$ 4,752,000
Parking operations	**$ 465,000**	$ 501,000	$ 514,000	$ 527,000
Entertainment Distrcit land leases	**$ 340,000**	$ 367,000	$ 376,000	$ 385,000
Gross Operating Income		**$ 31,983,000**	**$ 32,783,000**	**$ 33,602,000**
Less: Operating Expenses	**$ 18,867,000**	$ (20,318,000)	$ (20,826,000)	$ (21,347,000)
PILOT -Entetainment District area	**$ 300,000**	$ (323,000)	$ (331,000)	$ (339,000)
Net Operating Income		**$ 11,342,000**	**$ 11,626,000**	**$ 11,916,000**
Less: Annual Debt Service	**$ 8,976,000**	$ (8,976,000)	$ (8,976,000)	$ (8,976,000)
State Grants	**$ 2,000,000**	$ 2,154,000	$ 2,208,000	$ 2,263,000
Bond Funding	**$ 4,000,000**	$ 4,308,000	$ 4,416,000	$ 4,526,000
Gross Annual Proceeds		**$ 8,828,000**	**$ 9,274,000**	**$ 9,729,000**
Equity Interest Payment		$ (597,000)	$ (474,000)	$ (342,000)
Equity Principal Payment		$ (8,231,000)	$ (8,800,000)	$ (9,387,000)
Equity Balance	**$ 50,002,000**	$ 31,596,000	$ 22,796,000	$ 13,409,000
Investor Equity Payback		$ (8,828,000)	$ (9,274,000)	$ (9,729,000)
Net Annual Proceeds (Reserve)		**$ -**	**$ -**	**$ -**

Summary	
10-yr Cumulative Reserve	**$ 30,050,000**
Investor Equity Interest Rate	**1.5%**
Total Equity Payback	**$ 50,002,000**
Total Interest on Equity	**$ 3,814,000**
Total Equity Return	**$ 53,816,000**
Investor Return on Equity	**8%**
Equity Payback in Years	**8**

Appendix Exhibit 9.a.6 - Downtown Civic Center & Entert. District

Cash Flows

Period (Yr.)	Base	Optg. Yr. 7	Optg. Yr. 8	Optg. Yr. 9
inflation Factor (2.5%)	**2.5%**	1.16	1.19	1.22
Occupancy Factor		100%	100%	100%
Gross Scheduled Income				
Food & Beverage Operations	**$ 14,400,000**	$ 16,699,000	$ 17,116,000	$ 17,544,000
Facility rental Operations	**$ 11,100,000**	$ 12,872,000	$ 13,194,000	$ 13,524,000
Event Service operations	**$ 4,200,000**	$ 4,871,000	$ 4,993,000	$ 5,118,000
Parking operations	**$ 465,000**	$ 540,000	$ 554,000	$ 568,000
Entertainment Distrcit land leases	**$ 340,000**	$ 395,000	$ 405,000	$ 415,000
Gross Operating Income		**$ 34,442,000**	**$ 35,303,000**	**$ 36,186,000**
Less: Operating Expenses	**$ 18,867,000**	$ (21,881,000)	$ (22,428,000)	$ (22,989,000)
PILOT -Entetainment District area	**$ 300,000**	$ (347,000)	$ (356,000)	$ (365,000)
Net Operating Income		**$ 12,214,000**	**$ 12,519,000**	**$ 12,832,000**
Less: Annual Debt Service	**$ 8,976,000**	$ (8,976,000)	$ (8,976,000)	$ (8,976,000)
State Grants	**$ 2,000,000**	$ 2,320,000	$ 2,378,000	$ 2,437,000
Bond Funding	**$ 4,000,000**	$ 4,639,000	$ 4,755,000	$ 4,874,000
Gross Annual Proceeds		**$ 10,197,000**	**$ 10,676,000**	**$ 11,167,000**
Equity Interest Payment		$ (201,000)	$ (51,000)	$ -
Equity Principal Payment		$ (9,996,000)	$ (3,413,000)	$ -
Equity Balance	**$ 50,002,000**	$ 3,413,000	$ -	$ -
Investor Equity Payback		$ (10,197,000)	$ (3,464,000)	$ -
Net Annual Proceeds (Reserve)		**$ -**	**$ 7,212,000**	**$ 11,167,000**
Summary				
10-yr Cumulative Reserve	**$ 30,050,000**			
Investor Equity Interest Rate	**1.5%**			
Total Equity Payback	**$ 50,002,000**			
Total Interest on Equity	**$ 3,814,000**			
Total Equity Return	**$ 53,816,000**			
Investor Return on Equity	**8%**			
Equity Payback in Years	**8**			

Appendix Exhibit 9.a.6 - Downtown Civic Center & Entert. District		
Cash Flows		
Period (Yr.)	**Base**	Optg. Yr. 10
inflation Factor (2.5%)	**2.5%**	1.25
Occupancy Factor		100%
Gross Scheduled Income		
Food & Beverage Operations	**$ 14,400,000**	$ 17,983,000
Facility rental Operations	**$ 11,100,000**	$ 13,862,000
Event Service operations	**$ 4,200,000**	$ 5,246,000
Parking operations	**$ 465,000**	$ 582,000
Entertainment Distrcit land leases	**$ 340,000**	$ 425,000
Gross Operating Income		**$ 37,091,000**
Less: Operating Expenses	**$ 18,867,000**	$ (23,564,000)
PILOT -Entetainment District area	**$ 300,000**	$ (374,000)
Net Operating Income		**$ 13,153,000**
Less: Annual Debt Service	**$ 8,976,000**	$ (8,976,000)
State Grants	**$ 2,000,000**	$ 2,498,000
Bond Funding	**$ 4,000,000**	$ 4,996,000
Gross Annual Proceeds		**$ 11,671,000**
Equity Interest Payment		$ -
Equity Principal Payment		$ -
Equity Balance	**$ 50,002,000**	$ -
Investor Equity Payback		$ -
Net Annual Proceeds (Reserve)		**$ 11,671,000**
Summary		
10-yr Cumulative Reserve	**$ 30,050,000**	
Investor Equity Interest Rate	**1.5%**	
Total Equity Payback	**$ 50,002,000**	
Total Interest on Equity	**$ 3,814,000**	
Total Equity Return	**$ 53,816,000**	
Investor Return on Equity	**8%**	
Equity Payback in Years	**8**	

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PARTER International, Inc.

FORGEY PLANNING

D-H&Assoc

Workforce Housing Concept for Cape Coral

Cape Coral FLORIDA

The City of Cape Coral

September 30, 2024

A Workforce Housing Concept for Cape Coral

The Workforce Housing Challenge

The essential workers for any community, but particularly in Southwest Florida include teachers, EMS/EMT, police, fire, and health care professionals who are crucial to ensure the retention of these critical employees. Historically, a high percentage of these workers must be recruited from outside the region, and many have been recruited from outside the state of Florida. For decades, this out-of-state workforce has been a virtual tax break for Florida residents because teachers and health care employees, as well as many private sector professionals and paraprofessionals were educated at the expense of taxpayers in other states, Puerto Rico, and Canadian provinces which receive no return on their investment when their doctors, nurses, and educators beat a path for job opportunities in Florida. This geographic transfer of revenues, like the intergenerational transfer of revenues in the form of Social Security and pension funds has worked in Florida's favor since at least the end of World War II.

Florida still appeals to workers fresh from college and military service, as well as mid-career professionals and paraprofessionals, but the state's unrelenting growth has made Southwest Florida a far more expensive place for entry level people to live. In the palmy decades of the 1980s and 1990s, when Cape Coral's economy was booming and the community's institutions were being formed, the population grew from 32,000 to 75,000. The workforce that was needed to serve them found housing to be the least of their worries—it was typically affordable and in good condition. Most recent graduates in those decades had low student loan debt compared to those of their children's and grandchildren's generation who constitute the current cadre of critical workforce. They were eventually able if so inclined to put a down payment on a house which allowed them to stay in the community and participate in the local economy as consumers and taxpayers.

For the current generation, the opportunities are fewer and costlier. The challenge to public school teachers and to the School District of Lee County which employs them is a case in point. A May 15, 2024 WINK news story by reporter Claire Galt—herself a graduate of the University of North Carolina—revealed the importance of temporary employment firm Kelly Services in finding substitute teachers on a daily basis. Prior to contracting with Kelly, the School District was able to staff only 57 percent of classrooms with a full time or substitute teacher, forcing two or more classrooms to meet together in lunchrooms and other venues. After the Kelly contract was signed that figure increased to 88 percent, which is still suboptimal. Another problem, she observed in the lack of affordable housing. In May, toward the end of the school year, the District's whisper number was that there was a daily shortfall of teachers systemwide. The School District also offers "permanent substitute" postings for entire school years for persons who lack full credentials for licensure.

With local governments hiring essential and strategically important workforce who serve in Cape Coral annually, addressing housing affordability can make for effective on-boarding of key hires and employee retention, thereby reducing turnover of critically important staff and enhancing community stability. The challenge faces a broad spectrum of Lee County's largest employers and it is possible that a combined effort could provide a remedy. Implementing a comprehensive workforce housing strategy will support the retention of essential workers, stability and continuity of key skill sets, and contribute to the overall economic health of Cape Coral. By leveraging successful strategies from other communities and integrating examples specific to Florida, Cape Coral can develop innovative and sustainable housing solutions tailored to its unique needs.

Finally, designing a complete program to use housing to draw and maintain a workforce that enhances Cape Coral's economy and community life requires a Community Needs Assessment, a comprehensive assessment to identify the specific housing needs of essential workers. This should include surveys and data collection on current living situations, housing affordability, and factors contributing to employee retention and turnover which are beyond the ambit of this Economic Development Plan..

Resources Available to Cape Coral

1. **Community Land Trusts (CLTs)** can control land prices by owning land and leasing it affordably, thereby preserving community assets and stabilizing neighborhoods. No CLT has been identified in Lee County. This report recommends that Cape Coral take the initiative to start a Community Land Trust for Workforce Housing to hold and manage surplus lands in the public interest as an inducement to maintain interest in long-term employment by critical workforce employees, funded with seed money by the major government and public sector employers, including Lee County Sherriff's Office, School District of Lee County, and Lee Memorial Health Group.

2. **Utilization of Surplus Public Land:** Cape Coral and its governmental and public sector partners should advocate for policies at the local and state level that will facilitate the transfer of surplus public lands to housing developers at low or no cost, specifically for the development of affordable housing projects. This approach helps reduce construction costs and accelerates the development process. The Legislature's 2024 **Live Local Act** amended Florida's "surplus land" laws to increase accountability and transparency in dedicating and using more public land for these purposes. These statutes, found at s. 125.379 and 166.0451 for counties and cities respectively, require local governments to identify parcels they own in fee simple that are "appropriate for use as affordable housing." Parcels identified as "appropriate" for affordable housing must be placed on a local affordable housing inventory list. Local governments do not have a choice here, although surplus land provisions have existed since the administration of (Governor Jeb) Bush. The effectiveness of this provision is blunted by the fact that most of Cape Coral's surplus land consists of isolated 10,000 square

foot lots, which could have some utility as housing stock for critical workforce if combined with loans or subsidies.

3. **Federal Programs.** The City could leverage Federal funds in the form of HUD grants and tax credits to finance the construction and maintenance of affordable housing units. These funds are crucial for large-scale projects and can be complemented by state and local resources.
   - **Low Income Housing Tax Credit (LIHTC)** program, for example, is the nation's most successful program at producing affordable rental housing. Some critical workforce employees fall into this category. A recent study by the Urban Institute found **that LIHTC financed 18% of all new multi-family housing development in Florida from 2000-2019**.
   - Federal funding increases were key in a huge win towards ending homelessness in Charlotte County, Florida. CoCs saw an infusion of funding related to response to the pandemic in 2020, 2021, and 2022, including additional federal resources known as Emergency Solutions Grant (ESG) to address homelessness prevention, street outreach, rapid
   - rehousing, and emergency shelter needs.

4. **State Initiatives**. The City should maximize the use of the **Sadowski Trust Funds** and ensure full implementation of the Live Local Act, which allocates substantial resources to state housing initiatives. These funds are vital for supporting both new construction and housing preservation. State housing initiatives include:
   - Local Government Housing Trust Fund
   - State Housing Trust Fund
   - The Sadowski Trust Funds primarily support two statewide programs for affordable housing—**SHIP** and **SAIL**.

SHIP, funded by the Local Government Housing Trust Fund, is administered by FHFC and deploys funding to 67 counties and 55 cities for local affordable housing initiatives based on population. SHIP is flexible in that local governments can use the funds for both rental and homeownership and for a broad variety of activities such as down payment and closing cost assistance, new construction, rehabilitation, home repair, rental and mortgage assistance, insurance deductibles, and more. SHIP dollars are a great way to support new workforce housing construction and to preserve the state's existing affordable housing stock. For example, SHIP can both help older low-income adults age in place through home repairs and renovations and fund repairs to affordable multi- family rental housing.

SAIL, Florida's affordable rental housing program, is funded by the State Housing Trust Fund. Administered by FHFC, SAIL provides low-interest loans on a competitive basis to affordable housing developers often to bridge the gap between the development's primary financing and total cost of development. SAIL is a proven national model for financially supporting the development of affordable rental homes.

5. **Local Funding Mechanisms.** The City could allocate more resources towards housing, including the establishment of local housing trust funds. At one time, Cape Coral had such an entity, but it is now defunct. These funds can be used for direct rental assistance, homeowner subsidies, or to support housing development. **Examples of Employer-Assisted Housing (EAH) programs in Florida, demonstrating various strategies to aid employees in securing housing include:**

    - **Florida Hometown Heroes Housing Program:** This extensive program assists public servants across Florida, including law enforcement officers, educators, and healthcare workers, by providing down payment and closing cost assistance to make homeownership more attainable.

    - **City of Winter Haven:** As part of its Housing Action Plan, Winter Haven implements an EAH program. This initiative is integrated into a broader strategy aimed at improving affordable housing availability and supporting community infrastructure. The program is designed to attract and retain essential workers by facilitating access to housing within the community.

    - **Jacksonville EAH Incentives:** In Jacksonville, local government incentives encourage businesses to participate in EAH programs. These incentives are tailored to help employees with financial support for housing, which in turn aids in reducing commute times, boosting employee satisfaction and retention, and fostering community development.

    The EAH programs are intriguing, but narrowly focused on single-employer entities and cannot adequately respond to the much larger challenge of the workforce housing desert which exists in Southwest Florida.

6. **Zoning Reforms and Re-Evaluation of Existing Policies.** There is an ongoing statewide trend toward the root and branch restructuring of land use codes to support higher density and mixed-use developments, which in theory could reduce housing costs and increase supply. Simplifying zoning processes can also reduce delays and costs associated with housing development. Cape Coral's long history as a platted land community should give the community pause before moving headlong in this direction. The established entitlement, most of them on built and unbuilt 10,000 square foot single family lots already allows a built-out population of more than 400,000 people. Furthermore, the elimination of single-family detached residential zoning, the ubiquitous R-1, in cities like Minneapolis where it has

become *de rigueur*, the superimposition of higher density upon existing single-family monocultures, however well-intentioned, is almost certain to set off a recoil from neighbors who have relied in good faith on the representations of Future Land Use and Zoning Maps. Here are some examples of approaches taken by Florida local governments to reform existing land development regulations:

- **Palm Beach County Housing Bond:** In November of 2022, Palm Beach County voters approved a $200 million dollar bond for affordable housing. The bond will help create rental and homeownership opportunities for households earning up to 140% of the area median income.
- **St. Petersburg NTM-1 District**: In March of 2023, the City of St. Petersburg adopted a new zoning district to enable small-scale multi-family developments in urban, walkable neighborhoods near daily destinations. Key parameters for this new zone among other zoning regulations include:
    - Allows up to four units in a building.
    - Applies to locations that transition from a mixed-use corridor, center or "Future Major Street" (identified in the Comprehensive Plan) to a single-family neighborhood.
    - At least 75% of the property must be outside the Coastal High Hazard Area, and density in the CHHA cannot be increased via these regulations

Other examples may be removing regulations which cause housing prices to inflate such as:

- Single-family home-only zoning
- Minimum required parking
- Minimum dwelling unit size by square footage
- Large setbacks

7. **Inclusionary Housing Policies:** The City can implement or enhance inclusionary housing policies that require developers to include a percentage of affordable units in new residential projects. These policies ensure that new developments contribute positively to the housing stock without exacerbating segregation or displacement.

    - **House Bill 7103,** enacted in 2019, requires local governments to "fully offset all costs" to the developer of their affordable housing contribution under a mandatory inclusionary zoning program. Sarasota and Miami Dade Counties have instituted such programs.

8. **Live Local Act:** Florida's Live Local Act, signed into law in 2023, constituted the most significant reversal of the home rule tradition which characterized local government land use regulation since the adoption of the State Constitution in the late 1960s. The Act introduced new statewide land use standards ostensibly to facilitate the development of affordable housing in commercial, industrial, and mixed use districts. Eligible developments are now entitled to favorable development standards in state law regarding use, density, height, and, in certain circumstances, administrative approval regardless of whether those standards conflict with the local government's existing regulations, including zoning districts. The standards apply to multi-family or mixed-use residential rental developments proposed for an area zoned for commercial, industrial, or mixed-use, if at least 40% of the units are designated as affordable for households earning up to 120% AMI for a minimum of 30 years. This Live Local "land use preemption," as it has been called, could be utilized by affordable housing developers until 2033. *[See s. 125.01055(7)/166.04151(7) of Florida Statutes for more details, additional conditions, and exceptions that apply regarding the land use standards.]*

Additionally, the Live Local Act provided three new property tax exemptions for affordable housing:

1. **Local option affordable housing property tax exemption**: local governments may provide property tax exemptions for developments of 50 or more units with at least 20% of units affordable to households at or below 60% AMI.

2. **Nonprofit land used for affordable housing with a 99-year ground lease**. This exemption applies to land owned entirely by a nonprofit, such as a housing corporation, that is leased for a minimum of 99 years and predominantly used to provide affordable housing for households up to 120% AMI.

3. "**Missing middle" property tax exemption**: This exemption applies to newly constructed multi-family developments that have more than 70 affordable units for households up to 120% AMI, excluding units subject to an agreement with FHFC to provide housing to persons up to 80% AMI and property receiving the previously mentioned local option property tax exemption.

[Research above identified by Symbiosis Planning Consulting LLC.]

Strategies and Programs from Other Communities

1. Teacher Housing Programs

- **San Francisco, CA**
  - **Project Overview**: The city developed housing specifically for teachers, offering below-market rents and home-buying assistance.
  - **Project Details**: The initiative includes multiple projects, such as Shirley Chisholm Village, providing 135 affordable homes. The city has allocated $32 million for two additional projects: 63 units at 2205 Mission St. and 75 units at 750 Golden Gate Ave.
  - **Funding Sources**: The $32 million funding comprises $20 million from voter-approved 2019 General Obligation Bonds and $12 million from Certificates of Participation issued by the Controller's Office of Public Finance.
  - **Data and Impact**: The programs aim to support over 200 educators with affordable housing, significantly lowering living costs and improving retention rates by allowing teachers to live closer to their workplaces.
- **Santa Clara, CA**
  - **Project Overview**: The Teacher Housing Act of 2016 allowed school districts to lease district-owned land for affordable housing development.
  - **Project Details**: This policy facilitated the construction of affordable housing projects on surplus school properties, providing units for teachers and staff.
  - **Funding Sources**: Various funding sources including state grants and local government allocations.
  - **Data and Impact**: Several housing units have been developed under this act, significantly reducing housing costs for educators and aiding in teacher retention within the district.

2. Public Safety and Health Care Worker Housing

- **New York City, NY**
  - **Project Overview**: The Housing Development Corporation's "House New York" program provides subsidized housing to first responders and health care workers.
  - **Project Details**: The program includes multiple developments offering affordable rental units specifically for essential workers.
  - **Funding Sources**: Funded through a mix of city budget allocations and federal grants.

- Data and Impact: Thousands of units have been allocated to first responders and health care workers, improving their living conditions and job retention rates.

- **Baltimore, MD**
  - **Project Overview**: The “Live Near Your Work” program offers grants to city employees to buy homes in designated areas.
  - **Project Details**: This initiative provides financial assistance for down payments and closing costs, encouraging employees to live near their workplaces.
  - **Funding Sources**: Funded through city budget allocations and state grants.
  - **Data and Impact**: The program has awarded hundreds of grants, fostering community stability and reducing commute times.

3. Mixed-Use and Transit-Oriented Developments

- **Arlington, VA**
  - **Project Overview**: Created mixed-use developments near transit hubs with a significant portion of units designated for affordable housing.
  - **Project Details**: Developments such as the "Courthouse Plaza" offer residential units, retail spaces, and office buildings, all within walking distance of public transit.
  - **Funding Sources**: Combination of private investment and public funds.
  - **Data and Impact**: These projects have successfully integrated affordable housing with commercial and office spaces, promoting sustainable urban growth and reducing reliance on cars.
- **Denver, CO**
  - **Project Overview**: Developed workforce housing near public transportation to improve access and reduce commuting costs.
  - **Project Details**: Projects like the "Mariposa District" offer mixed-income housing with easy access to light rail stations and bus lines.
  - **Funding Sources**: Funded through a combination of federal grants and city allocations.
  - **Data and Impact**: These developments have increased public transit usage, decreased traffic congestion, and provided affordable housing options for the workforce.

Examples Specific to Florida

1. Miami-Dade County, FL

- **Teacher Support Program**
    - **Project Overview**: Offers down payment assistance and rental subsidies to teachers, improving retention rates.
    - **Project Details**: The program provides financial support for housing costs, making homeownership and affordable renting accessible to educators.
    - **Funding Sources**: Funded through state grants and local government allocations.
    - **Data and Impact**: Hundreds of teachers have benefited from this program, leading to higher retention rates and improved job satisfaction.
- **Affordable Housing Initiatives**
    - **Project Overview**: Partnered with private developers to create mixed-income housing developments that include units reserved for essential workers.
    - **Project Details**: Projects like "Liberty Square" have been developed, providing a mix of affordable and market-rate units.
    - **Funding Sources**: Funded through a combination of private investments and public funds.
    - **Data and Impact**: These initiatives have increased the supply of affordable housing, helping to stabilize the local housing market and support the workforce.

2. Orlando, FL

- **Housing for Heroes**
    - **Project Overview**: A program that provides affordable housing options specifically for first responders and health care workers, including subsidized rental units and assistance with home purchases.
    - **Project Details**: The initiative offers financial assistance and dedicated housing units to essential workers.
    - **Funding Sources**: Funded through local government allocations and federal grants.
    - **Data and Impact**: The program has successfully housed many first responders and health care workers, reducing their housing costs and increasing their job stability.
- **Public-Private Partnerships**

- **Project Overview**: Leveraged PPPs to fund and manage the development of workforce housing projects, ensuring long-term affordability and maintenance.
- **Project Details**: Projects like "Creative Village" in downtown Orlando combine residential, commercial, and educational spaces with affordable housing units.
- **Funding Sources**: Funded through a mix of private investment and public funds.
- **Data and Impact**: These partnerships have led to the creation of sustainable communities, integrating affordable housing with essential services and amenities.

3. Tampa, FL

- **Workforce Housing Fund**
  - **Project Overview**: Established a dedicated fund to support the development of affordable housing for essential workers, utilizing local government allocations and federal grants.
  - **Project Details**: The fund finances various housing projects, providing grants and low-interest loans to developers.
  - **Funding Sources**: Funded through a mix of local government allocations and federal grants.
  - **Data and Impact**: Numerous affordable housing units have been built, helping to alleviate the housing shortage for essential workers.
- **Transit-Oriented Development**
  - **Project Overview**: Focused on creating affordable housing near major transit routes to reduce commuting costs and improve accessibility for essential workers.
  - **Project Details**: Developments such as "Encore!" near downtown Tampa offer affordable housing with easy access to public transit.
  - **Funding Sources**: Funded through a combination of federal grants and local government allocations.
  - **Data and Impact**: These projects have improved access to affordable housing and public transportation, making it easier for workers to commute and live affordably.

Examples Specific to City

Cape Coral - Affordable Housing Community

Project Overview: Civitas of Cape Coral is a affordable housing development located at 105 Civitas Court, Cape Coral, FL. This project marks the city's first major effort to provide attainable workforce housing, addressing a longstanding need for affordable living options in the community.

Development Details

- **Units**: 96 units catering to residents earning 80%, 60%, and 30% of the area median income (AMI).
- **Funding**: The project is funded through a mix of local, state, and federal dollars, following HUD guidelines.
- **Construction**: The development consists of three energy-efficient, green building-certified residential buildings offering one-, two-, and three-bedroom units.
- **Rent**: Average rent is approximately $950 per month.

Community Impact

- **Target Residents**: The project aims to house adults primarily in the workforce (80%) and those on fixed incomes (20%), including individuals on Social Security, disability, or veterans affairs housing assistance.
- **Industries Represented**: Expected residents will come from various sectors such as tourism, government, retail, healthcare, and transportation.
- **Amenities**: The community will feature a 6,100-square-foot clubhouse, a business center, fitness center, swimming pool, and on-site property management and maintenance. Additionally, residents will have access to financial literacy and employment training assistance.

Significance and Future Projects

- **Economic Growth**: By providing affordable housing, Civitas aims to attract workers essential for local businesses, thus addressing staffing shortages and promoting economic growth.
- **Expansion Potential**: With the county recently awarded a $1.1 billion grant from HUD, there are opportunities for more projects similar to Civitas, expanding the availability of affordable housing in the region.

Cape Coral Comprehensive and Strategic Plan Linkages

Comprehensive Plan Policies

The Cape Coral Comprehensive Plan includes several key elements that guide the city's development and strategic planning. Key chapters relevant to housing and community development include:

1. **Housing Element**
   - **Goal**: Ensure a diverse and affordable housing supply to meet the needs of all current and future residents.
   - **Objective 1**: Promote the development of affordable housing units.
     - **Policy 1.1**: Provide incentives such as density bonuses for developments that include affordable housing units.
     - **Policy 1.2**: Collaborate with private developers and non-profit organizations to increase affordable housing stock.
2. **Future Land Use Element**
   - **Goal**: Guide the type, density, and intensity of land use to ensure sustainable and orderly growth.
   - **Objective 2**: Facilitate mixed-use development to promote a live-work-play environment.
     - **Policy 2.1**: Designate areas for mixed-use development in the future land use map.
     - **Policy 2.2**: Implement zoning regulations that support higher density and mixed-use projects.
3. **Economic Development Element**
   - **Goal**: Diversify the economy and create job opportunities.
   - **Objective 3**: Support businesses that provide essential services and housing.
     - **Policy 3.1**: Offer financial incentives to businesses that contribute to the local economy and provide workforce housing.
     - **Policy 3.2**: Promote public-private partnerships to develop affordable housing for essential workers.
4. **Infrastructure Element**
   - **Goal**: Ensure the provision of essential services and infrastructure.

- **Objective 4**: Plan for and invest in infrastructure to support new housing developments.
  - **Policy 4.1**: Prioritize infrastructure improvements in areas designated for affordable housing development.
  - **Policy 4.2**: Ensure new developments comply with sustainability and hazard mitigation standards.

Strategic Plan Linkages

Cape Coral's strategic plan aligns with the comprehensive plan to ensure coordinated development efforts. Key focus areas include:

- **Sustainable Growth**: Balancing development with environmental conservation.
- **Economic Diversification**: Supporting sectors that provide stable employment and housing opportunities.
- **Community Engagement**: Involving residents in planning processes to ensure developments meet community needs.

Housing Statistics and Programs

Housing Statistics for Cape Coral, FL

Cape Coral's housing market reveals a growing demand for affordable housing options, characterized by high property values and rising rental prices. Here's a detailed look at the current market trends and key data points:

Key Data Points

- Median Sale Price: $391,000 (down 5.8% YoY)
- Median Sale Price per Square Foot: $230 (down 5.7% YoY)
- Number of Homes Sold: 632 (up 3.6% YoY)
- Median Days on Market: 60 days (up from 34 days YoY)
- Sale-to-List Price Ratio: 96.7%
- Homes Sold Above List Price: 8.4%
- Homes with Price Drops: 39.1%
- Inbound Migration: Major sources include Miami (2,708), Chicago (1,962), and New York (1,256)

- Outbound Migration: Popular destinations include Sarasota (473), Jacksonville (72), and Knoxville (60)

Current Housing Market

- **Market Competitiveness**: The Cape Coral housing market is somewhat competitive, with homes receiving one offer on average and selling in about 60 days.
- **Median Sale Price**: The median sale price of a home in Cape Coral was $391,000 as of May 2024, which is a 5.8% decrease compared to the previous year.
- **Price Per Square Foot**: The median sale price per square foot is $230, down 5.7% year-over-year.

Market Trends

- **Homes Sold**: In May 2024, there were 632 homes sold in Cape Coral, a 3.6% increase from 610 homes sold in May 2023.
- **Days on Market**: Homes in Cape Coral sell after an average of 60 days on the market, up from 34 days last year.

Rental Market

- **Cost Burden**: A significant portion of renters in Cape Coral are cost-burdened, spending more than 30% of their income on housing.
- **Rental Prices**: Increasing rental prices continue to challenge affordability for many residents.

Housing Market Metrics

- **Sale-to-List Price**: Homes in Cape Coral sell for about 96.7% of the list price on average, slightly down by 0.51 points year-over-year.
- **Homes Sold Above List Price**: Approximately 8.4% of homes sold above list price, which is a decrease of 2.9 points from the previous year.
- **Homes with Price Drops**: About 39.1% of homes had price drops, up by 4.1 points year-over-year.

Migration and Relocation Trends

- **Inbound Migration**: 61% of homebuyers searched to stay within the Cape Coral metropolitan area. Popular inbound migration sources include Miami, Chicago, and New York.
- **Outbound Migration**: Cape Coral residents frequently move to Sarasota, Jacksonville, and Knoxville. The most popular destinations for those moving out of Cape Coral include Sarasota (473 people), Jacksonville (72 people), and Knoxville (60 people).

Housing Plans and Programs

Cape Coral implements several housing programs to address these affordability and supply challenges:

1. **Community Development Block Grant (CDBG) Program**
    - Funds used for housing rehabilitation, homeownership assistance, and public facilities improvements.
2. **State Housing Initiatives Partnership (SHIP) Program**
    - Provides down payment assistance, home rehabilitation, and new construction programs.
3. **Neighborhood Stabilization Program (NSP)**
    - Focuses on acquiring and redeveloping foreclosed properties to prevent blight and stabilize neighborhoods.

Key Personnel

- **Amy Yearsley Thomas**: Housing Coordinator involved in pursuing funding and managing housing programs.
- **Milica Babic**: Senior Planner focusing on community development initiatives.

Potential Funding and Financing Mechanisms

- **Local Government Allocations**: Dedicate a portion of city funds to workforce housing projects.
- **State and Federal Grants**: Leverage programs such as the Low-Income Housing Tax Credit (LIHTC) and Community Development Block Grants (CDBG).
- **Public-Private Partnerships (PPPs)**: Collaborate with private developers to share risks and leverage additional funding.
- **Revenue Bonds and Tax Increment Financing (TIF)**: Use these tools to finance large-scale development projects.

Legal and Regulatory Considerations

Review and Amend Zoning Regulations:

- **Higher Density and Mixed-Use Developments:** Evaluate and modify existing zoning laws to support higher-density residential projects and mixed-use developments. This can include creating new zoning categories or updating current regulations to allow for more flexible land use that integrates residential, commercial, and recreational spaces.

- **Public Development Corporation (PDC):** Establish a PDC to manage and oversee housing projects. PDCs operate with greater flexibility than traditional government departments, allowing for more efficient project execution. They can stimulate local economies, revitalize underutilized areas, and engage in various real estate projects, including affordable housing and infrastructure improvements.

Example:

- **New York City Economic Development Corporation (NYCEDC):** Successfully redeveloped the Brooklyn Navy Yard and revitalized Times Square, improving urban spaces and attracting private investment.

Site Selection and Development Planning

Identify Suitable Land for Development:

- **City-Owned or Underutilized Land:** Prioritize the identification and acquisition of city-owned or underutilized land for development. Assess these sites for their potential to support new housing projects, considering factors like location, size, and existing infrastructure.
- **Environmental Impact Assessments:** Conduct thorough assessments to ensure sustainability and minimize negative environmental impacts. This is crucial for maintaining ecological balance and adhering to regulatory requirements.

Prioritize Strategic Locations:

- **Proximity to Employment Centers, Schools, and Public Transportation:** Focus on sites near key amenities and infrastructure to ensure that residents have easy access to jobs, education, and transportation. This reduces commuting times and enhances the overall quality of life for residents.
- **Mixed-Use Development Integration:** Collaborate with architects and urban planners to design developments that integrate residential units with commercial spaces, green areas, and community facilities. Sustainable building practices and community interaction features should be prioritized.

Example:

- **Denver's Mariposa District:** A mixed-income housing development near public transportation that has increased public transit usage and provided affordable housing options.

Community Engagement and Support

Conduct Public Meetings and Forums:

- **Gather Input and Build Support:** Engage with local residents through public meetings and forums to gather input and build community support for housing projects. Transparency and inclusiveness are key to fostering trust and cooperation.
- **Regular Updates and Feedback Incorporation:** Keep the community informed about project progress through newsletters, social media, and regular updates. Actively incorporate community feedback into project plans to address concerns and enhance support.

Example:

- **Baltimore's "Live Near Your Work" Program:** Offers grants to city employees to buy homes in designated areas, fostering community stability and reducing commute times.

Community Engagement Strategies:

- **Public Meetings and Forums:** Actively engage local residents to gather input and build support. Ensure transparent communication and address community concerns.
- **Regular Updates:** Maintain consistent communication about project progress and incorporate community feedback.

Example:

- **Miami-Dade's Affordable Housing Initiatives:** Partnered with private developers to create mixed-income housing, increasing affordable housing supply and stabilizing the local housing market.

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Economic Development Strategic Plan - RCM2342AS

Task 10 Report – Appendices

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Appendix Table 10.a.1 – Retail Trade					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
41-0000	Sales and Related	7,560,970	48.5%	1	3,144
53-0000	Transportation and Material Moving	2,921,740	18.8%	2	1,215
43-0000	Office and Administrative Support	1,332,920	8.6%	3	554
49-0000	Installation, Maintenance, and Repair	772,130	5.0%	4	321
11-0000	Management	631,880	4.1%	5	263
29-0000	Healthcare Practitioners and Technical	566,980	3.6%	6	236
35-0000	Food Preparation and Serving Related	565,160	3.6%	7	235
51-0000	Production	366,710	2.4%	8	152
13-0000	Business and Financial Operations	236,710	1.5%	9	98
27-0000	Arts, Design, Entertainment, Sports, and Media	169,570	1.1%	10	71
37-0000	Building and Grounds Cleaning and Maintenance	114,140	0.7%	11	47
33-0000	Protective Service	81,680	0.5%	12	34
39-0000	Personal Care and Service	80,710	0.5%	13	34
15-0000	Computer and Mathematical	55,750	0.4%	14	23
31-0000	Healthcare Support	39,830	0.3%	15	17
47-0000	Construction and Extraction	37,600	0.2%	16	16
45-0000	Farming, Fishing, and Forestry	23,680	0.2%	17	10
25-0000	Educational Instruction and Library	10,850	0.1%	18	5
17-0000	Architecture and Engineering	3,620	0.0%	19	2
23-0000	Legal	3,080	0.0%	20	1
21-0000	Community and Social Service	1,290	0.0%	21	1
Total		**15,577,000**	**100.0%**		**6,477**
		6,477	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.2 – Healthcare & Social Assistance					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
29-0000	Healthcare Practitioners and Technical	7,203,070	32.6%	1	1,706
31-0000	Healthcare Support	6,452,600	29.2%	2	1,528
43-0000	Office and Administrative Support	2,760,640	12.5%	3	654
21-0000	Community and Social Service	1,255,610	5.7%	4	297
11-0000	Management	953,310	4.3%	5	226
25-0000	Educational Instruction and Library	566,680	2.6%	6	134
39-0000	Personal Care and Service	563,440	2.6%	7	133
35-0000	Food Preparation and Serving Related	512,750	2.3%	8	121
13-0000	Business and Financial Operations	469,080	2.1%	9	111
37-0000	Building and Grounds Cleaning and Maintenance	413,710	1.9%	10	98
49-0000	Installation, Maintenance, and Repair	165,540	0.8%	11	39
53-0000	Transportation and Material Moving	153,810	0.7%	12	36
15-0000	Computer and Mathematical	144,390	0.7%	13	34
19-0000	Life, Physical, and Social Science	143,040	0.6%	14	34
33-0000	Protective Service	86,070	0.4%	15	20
51-0000	Production	78,770	0.4%	16	19
41-0000	Sales and Related	71,540	0.3%	17	17
27-0000	Arts, Design, Entertainment, Sports, and Media	39,840	0.2%	18	9
47-0000	Construction and Extraction	18,810	0.1%	19	4
23-0000	Legal	8,270	0.0%	20	2
17-0000	Architecture and Engineering	5,370	0.0%	21	1
45-0000	Farming, Fishing, and Forestry	2,230	0.0%	22	1
Total		**22,068,570**	**100.0%**		**5,226**
		5,226	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.3 – Accommodation & Food Services					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
35-0000	Food Preparation and Serving Related	10,989,090	78.9%	1	3,971
37-0000	Building and Grounds Cleaning and Maintenance	587,030	4.2%	2	212
11-0000	Management	511,230	3.7%	3	185
43-0000	Office and Administrative Support	460,640	3.3%	4	166
41-0000	Sales and Related	433,080	3.1%	5	157
53-0000	Transportation and Material Moving	279,220	2.0%	6	101
49-0000	Installation, Maintenance, and Repair	155,030	1.1%	7	56
39-0000	Personal Care and Service	142,910	1.0%	8	52
51-0000	Production	127,520	0.9%	9	46
13-0000	Business and Financial Operations	106,800	0.8%	10	39
33-0000	Protective Service	76,750	0.6%	11	28
27-0000	Arts, Design, Entertainment, Sports, and Media	20,310	0.1%	12	7
31-0000	Healthcare Support	11,470	0.1%	13	4
29-0000	Healthcare Practitioners and Technical	7,700	0.1%	14	3
15-0000	Computer and Mathematical	7,130	0.1%	15	3
47-0000	Construction and Extraction	6,340	0.0%	16	2
25-0000	Educational Instruction and Library	1,930	0.0%	17	1
45-0000	Farming, Fishing, and Forestry	1,550	0.0%	18	1
17-0000	Architecture and Engineering	950	0.0%	19	0
19-0000	Life, Physical, and Social Science	630	0.0%	20	0
21-0000	Community and Social Service	430	0.0%	21	0
23-0000	Legal	190	0.0%	22	0
Total		**13,927,930**	**100.0%**		**5,033**
		5,033	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.4 – Construction					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
47-0000	Construction and Extraction	4,650,610	58.7%	1	2,333
43-0000	Office and Administrative Support	719,600	9.1%	2	361
49-0000	Installation, Maintenance, and Repair	698,470	8.8%	3	350
11-0000	Management	620,000	7.8%	4	311
13-0000	Business and Financial Operations	479,800	6.1%	5	241
53-0000	Transportation and Material Moving	244,740	3.1%	6	123
41-0000	Sales and Related	167,800	2.1%	7	84
51-0000	Production	127,070	1.6%	8	64
17-0000	Architecture and Engineering	103,940	1.3%	9	52
37-0000	Building and Grounds Cleaning and Maintenance	38,150	0.5%	10	19
15-0000	Computer and Mathematical	22,890	0.3%	11	11
19-0000	Life, Physical, and Social Science	21,740	0.3%	12	11
27-0000	Arts, Design, Entertainment, Sports, and Media	12,440	0.2%	13	6
33-0000	Protective Service	8,230	0.1%	14	4
23-0000	Legal	2,620	0.0%	15	1
45-0000	Farming, Fishing, and Forestry	950	0.0%	16	0
35-0000	Food Preparation and Serving Related	910	0.0%	17	0
39-0000	Personal Care and Service	530	0.0%	18	0
25-0000	Educational Instruction and Library	210	0.0%	19	0
21-0000	Community and Social Service	200	0.0%	20	0
31-0000	Healthcare Support	110	0.0%	21	0
29-0000	Healthcare Practitioners and Technical	100	0.0%	22	0
Total		**7,921,110**	**100.0%**		**3,974**
		3,974	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.5 – Educational Services					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
25-0000	Educational Instruction and Library	7,721,780	58.7%	1	2,333
43-0000	Office and Administrative Support	1,123,970	9.1%	2	361
11-0000	Management	799,140	8.8%	3	350
37-0000	Building and Grounds Cleaning and Maintenance	460,480	7.8%	4	311
21-0000	Community and Social Service	445,380	6.1%	5	241
13-0000	Business and Financial Operations	404,880	3.1%	6	123
35-0000	Food Preparation and Serving Related	362,750	2.1%	7	84
29-0000	Healthcare Practitioners and Technical	314,810	1.6%	8	64
27-0000	Arts, Design, Entertainment, Sports, and Media	269,580	1.3%	9	52
15-0000	Computer and Mathematical	246,890	0.5%	10	19
53-0000	Transportation and Material Moving	240,490	0.3%	11	11
39-0000	Personal Care and Service	209,980	0.3%	12	11
33-0000	Protective Service	189,630	0.2%	13	6
19-0000	Life, Physical, and Social Science	182,470	0.1%	14	4
49-0000	Installation, Maintenance, and Repair	171,630	0.0%	15	1
31-0000	Healthcare Support	54,110	0.0%	16	0
47-0000	Construction and Extraction	40,960	0.0%	17	0
41-0000	Sales and Related	34,670	0.0%	18	0
17-0000	Architecture and Engineering	16,780	0.0%	19	0
51-0000	Production	14,170	0.0%	20	0
23-0000	Legal	6,530	0.0%	21	0
45-0000	Farming, Fishing, and Forestry	2,510	0.0%	22	0
Total		**13,313,590**	**100.0%**		**3,489**
		3,489	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.6 – Other Services (Ex. Pub. Admin.)					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
39-0000	Personal Care and Service	881,660	20.4%	1	669
49-0000	Installation, Maintenance, and Repair	705,320	16.3%	2	536
43-0000	Office and Administrative Support	564,000	13.1%	3	428
53-0000	Transportation and Material Moving	399,060	9.2%	4	303
11-0000	Management	377,980	8.8%	5	287
13-0000	Business and Financial Operations	307,080	7.1%	6	233
51-0000	Production	235,880	5.5%	7	179
41-0000	Sales and Related	171,900	4.0%	8	131
21-0000	Community and Social Service	128,070	3.0%	9	97
37-0000	Building and Grounds Cleaning and Maintenance	90,940	2.1%	10	69
35-0000	Food Preparation and Serving Related	88,740	2.1%	11	67
27-0000	Arts, Design, Entertainment, Sports, and Media	78,920	1.8%	12	60
31-0000	Healthcare Support	64,340	1.5%	13	49
25-0000	Educational Instruction and Library	64,310	1.5%	14	49
15-0000	Computer and Mathematical	42,620	1.0%	15	32
33-0000	Protective Service	37,210	0.9%	16	28
29-0000	Healthcare Practitioners and Technical	17,920	0.4%	17	14
47-0000	Construction and Extraction	17,480	0.4%	18	13
19-0000	Life, Physical, and Social Science	16,970	0.4%	19	13
17-0000	Architecture and Engineering	13,000	0.3%	20	10
23-0000	Legal	10,120	0.2%	21	8
45-0000	Farming, Fishing, and Forestry	2,890	0.1%	22	2
Total		**4,316,410**	**100.0%**		**3,277**
		3,277	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.7 – Real Estate Rental & Leasing					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
41-0000	Sales and Related	471,030	20.4%	1	669
49-0000	Installation, Maintenance, and Repair	449,860	16.3%	2	536
11-0000	Management	416,830	13.1%	3	428
43-0000	Office and Administrative Support	393,790	9.2%	4	303
13-0000	Business and Financial Operations	172,280	8.8%	5	287
53-0000	Transportation and Material Moving	160,750	7.1%	6	233
37-0000	Building and Grounds Cleaning and Maintenance	131,310	5.5%	7	179
47-0000	Construction and Extraction	33,950	4.0%	8	131
33-0000	Protective Service	25,730	3.0%	9	97
39-0000	Personal Care and Service	24,640	2.1%	10	69
15-0000	Computer and Mathematical	22,390	2.1%	11	67
27-0000	Arts, Design, Entertainment, Sports, and Media	20,040	1.8%	12	60
51-0000	Production	13,840	1.5%	13	49
23-0000	Legal	9,070	1.5%	14	49
17-0000	Architecture and Engineering	5,290	1.0%	15	32
29-0000	Healthcare Practitioners and Technical	3,210	0.9%	16	28
21-0000	Community and Social Service	2,470	0.4%	17	14
19-0000	Life, Physical, and Social Science	1,190	0.4%	18	13
25-0000	Educational Instruction and Library	720	0.4%	19	13
Total		**2,358,390**	**100.0%**		**2,958**
		2,958	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.8 – Professional, Scientific & Technical					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
13-0000	Business and Financial Operations	2,012,790	18.7%	1	496
15-0000	Computer and Mathematical	1,860,550	17.3%	2	459
43-0000	Office and Administrative Support	1,527,990	14.2%	3	377
11-0000	Management	1,353,100	12.6%	4	333
17-0000	Architecture and Engineering	968,090	9.0%	5	239
23-0000	Legal	784,630	7.3%	6	193
41-0000	Sales and Related	497,810	4.6%	7	123
27-0000	Arts, Design, Entertainment, Sports, and Media	400,530	3.7%	8	99
19-0000	Life, Physical, and Social Science	381,220	3.5%	9	94
29-0000	Healthcare Practitioners and Technical	254,750	2.4%	10	63
51-0000	Production	137,290	1.3%	11	34
31-0000	Healthcare Support	119,270	1.1%	12	29
53-0000	Transportation and Material Moving	114,590	1.1%	13	28
47-0000	Construction and Extraction	98,010	0.9%	14	24
49-0000	Installation, Maintenance, and Repair	89,450	0.8%	15	22
39-0000	Personal Care and Service	48,750	0.5%	16	12
37-0000	Building and Grounds Cleaning and Maintenance	36,560	0.3%	17	9
33-0000	Protective Service	18,200	0.2%	18	4
21-0000	Community and Social Service	17,070	0.2%	19	4
25-0000	Educational Instruction and Library	13,740	0.1%	20	3
35-0000	Food Preparation and Serving Related	7,470	0.1%	21	2
45-0000	Farming, Fishing, and Forestry	5,450	0.1%	22	1
Total		**10,747,310**	**100.0%**		**2,649**
		2,649	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.9 – Public Administration					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
25-0000	Educational Instruction and Library	6,349,650	29.1%	1	754
43-0000	Office and Administrative Support	3,024,000	13.9%	2	359
33-0000	Protective Service	2,061,420	9.4%	3	245
13-0000	Business and Financial Operations	1,420,470	6.5%	4	169
29-0000	Healthcare Practitioners and Technical	1,270,690	5.8%	5	151
11-0000	Management	1,225,380	5.6%	6	145
21-0000	Community and Social Service	860,650	3.9%	7	102
37-0000	Building and Grounds Cleaning and Maintenance	683,070	3.1%	8	81
53-0000	Transportation and Material Moving	668,070	3.1%	9	79
49-0000	Installation, Maintenance, and Repair	592,570	2.7%	10	70
47-0000	Construction and Extraction	497,040	2.3%	11	59
19-0000	Life, Physical, and Social Science	494,840	2.3%	12	59
15-0000	Computer and Mathematical	483,550	2.2%	13	57
35-0000	Food Preparation and Serving Related	458,460	2.1%	14	54
39-0000	Personal Care and Service	363,520	1.7%	15	43
31-0000	Healthcare Support	303,950	1.4%	16	36
17-0000	Architecture and Engineering	298,610	1.4%	17	35
23-0000	Legal	274,040	1.3%	18	33
27-0000	Arts, Design, Entertainment, Sports, and Media	198,540	0.9%	19	24
51-0000	Production	179,330	0.8%	20	21
41-0000	Sales and Related	85,630	0.4%	21	10
45-0000	Farming, Fishing, and Forestry	21,370	0.1%	22	3
Total		**21,814,850**	**100.0%**		**2,590**
		2,590	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.10 – Administrative, Support & Waste Management					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
37-0000	Building and Grounds Cleaning and Maintenance	1,991,880	21.0%	1	275
43-0000	Office and Administrative Support	1,514,420	15.9%	2	209
53-0000	Transportation and Material Moving	1,216,460	12.8%	3	168
33-0000	Protective Service	902,630	9.5%	4	125
51-0000	Production	638,670	6.7%	5	88
13-0000	Business and Financial Operations	608,560	6.4%	6	84
11-0000	Management	458,020	4.8%	7	63
41-0000	Sales and Related	413,740	4.4%	8	57
49-0000	Installation, Maintenance, and Repair	288,690	3.0%	9	40
47-0000	Construction and Extraction	287,550	3.0%	10	40
15-0000	Computer and Mathematical	284,850	3.0%	11	39
29-0000	Healthcare Practitioners and Technical	264,410	2.8%	12	37
31-0000	Healthcare Support	165,970	1.7%	13	23
35-0000	Food Preparation and Serving Related	99,020	1.0%	14	14
25-0000	Educational Instruction and Library	71,060	0.7%	15	10
27-0000	Arts, Design, Entertainment, Sports, and Media	68,620	0.7%	16	9
17-0000	Architecture and Engineering	66,560	0.7%	17	9
39-0000	Personal Care and Service	55,250	0.6%	18	8
19-0000	Life, Physical, and Social Science	38,390	0.4%	19	5
21-0000	Community and Social Service	23,280	0.2%	20	3
23-0000	Legal	19,380	0.2%	21	3
45-0000	Farming, Fishing, and Forestry	19,170	0.2%	22	3
Total		**9,496,580**	**100.0%**		**1,312**
		1,312	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.11 – Finance & Insurance					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
43-0000	Office and Administrative Support	2,013,460	32.2%	1	357
13-0000	Business and Financial Operations	1,759,260	28.1%	2	312
41-0000	Sales and Related	1,013,860	16.2%	3	180
11-0000	Management	762,220	12.2%	4	135
15-0000	Computer and Mathematical	490,660	7.8%	5	87
23-0000	Legal	64,670	1.0%	6	11
29-0000	Healthcare Practitioners and Technical	63,750	1.0%	7	11
27-0000	Arts, Design, Entertainment, Sports, and Media	22,650	0.4%	8	4
49-0000	Installation, Maintenance, and Repair	15,160	0.2%	9	3
21-0000	Community and Social Service	14,820	0.2%	10	3
33-0000	Protective Service	10,600	0.2%	11	2
37-0000	Building and Grounds Cleaning and Maintenance	6,840	0.1%	12	1
19-0000	Life, Physical, and Social Science	4,340	0.1%	13	1
17-0000	Architecture and Engineering	4,100	0.1%	14	1
53-0000	Transportation and Material Moving	3,440	0.1%	15	1
51-0000	Production	2,580	0.0%	16	0
31-0000	Healthcare Support	2,480	0.0%	17	0
35-0000	Food Preparation and Serving Related	780	0.0%	18	0
45-0000	Farming, Fishing, and Forestry	750	0.0%	19	0
25-0000	Educational Instruction and Library	700	0.0%	20	0
47-0000	Construction and Extraction	680	0.0%	21	0
39-0000	Personal Care and Service	520	0.0%	22	0
Total		**6,258,320**	**100.0%**		**1,109**
		1,109	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.12 – Information					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
15-0000	Computer and Mathematical	748,590	24.6%	1	225
27-0000	Arts, Design, Entertainment, Sports, and Media	440,720	14.5%	2	132
11-0000	Management	376,460	12.4%	3	113
43-0000	Office and Administrative Support	346,160	11.4%	4	104
41-0000	Sales and Related	341,520	11.2%	5	103
13-0000	Business and Financial Operations	323,980	10.7%	6	97
49-0000	Installation, Maintenance, and Repair	205,990	6.8%	7	62
39-0000	Personal Care and Service	78,090	2.6%	8	23
17-0000	Architecture and Engineering	41,460	1.4%	9	12
35-0000	Food Preparation and Serving Related	32,580	1.1%	10	10
53-0000	Transportation and Material Moving	28,540	0.9%	11	9
51-0000	Production	18,570	0.6%	12	6
25-0000	Educational Instruction and Library	17,960	0.6%	13	5
23-0000	Legal	14,040	0.5%	14	4
47-0000	Construction and Extraction	6,770	0.2%	15	2
37-0000	Building and Grounds Cleaning and Maintenance	5,510	0.2%	16	2
33-0000	Protective Service	4,760	0.2%	17	1
19-0000	Life, Physical, and Social Science	3,780	0.1%	18	1
29-0000	Healthcare Practitioners and Technical	3,100	0.1%	19	1
21-0000	Community and Social Service	1,110	0.0%	20	0
31-0000	Healthcare Support	250	0.0%	21	0
15-0000	Computer and Mathematical	748,590	24.6%	1	225
Total		**3,039,940**	**100.0%**		**913**
		913	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.14 – Manufacturing					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
51-0000	Production	6,263,050	48.8%	1	444
53-0000	Transportation and Material Moving	1,158,820	9.0%	2	82
43-0000	Office and Administrative Support	980,920	7.6%	3	70
11-0000	Management	849,770	6.6%	4	60
17-0000	Architecture and Engineering	782,730	6.1%	5	56
49-0000	Installation, Maintenance, and Repair	690,690	5.4%	6	49
13-0000	Business and Financial Operations	647,340	5.0%	7	46
41-0000	Sales and Related	417,230	3.3%	8	30
15-0000	Computer and Mathematical	331,370	2.6%	9	24
47-0000	Construction and Extraction	199,580	1.6%	10	14
19-0000	Life, Physical, and Social Science	152,560	1.2%	11	11
35-0000	Food Preparation and Serving Related	132,220	1.0%	12	9
27-0000	Arts, Design, Entertainment, Sports, and Media	84,370	0.7%	13	6
37-0000	Building and Grounds Cleaning and Maintenance	78,060	0.6%	14	6
45-0000	Farming, Fishing, and Forestry	32,300	0.3%	15	2
29-0000	Healthcare Practitioners and Technical	12,090	0.1%	16	1
33-0000	Protective Service	11,310	0.1%	17	1
23-0000	Legal	7,190	0.1%	18	1
39-0000	Personal Care and Service	1,730	0.0%	19	0
31-0000	Healthcare Support	1,070	0.0%	20	0
25-0000	Educational Instruction and Library	420	0.0%	21	0
21-0000	Community and Social Service	200	0.0%	22	0
Total		**12,835,020**	**100.0%**		**910**
		910	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.14 – Arts, Design, Entertainment, Sports, and Media					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
39-0000	Personal Care and Service	726,040	28.8%	1	252
35-0000	Food Preparation and Serving Related	330,940	13.1%	2	115
43-0000	Office and Administrative Support	246,840	9.8%	3	86
27-0000	Arts, Design, Entertainment, Sports, and Media	242,290	9.6%	4	84
37-0000	Building and Grounds Cleaning and Maintenance	175,380	6.9%	5	61
41-0000	Sales and Related	172,100	6.8%	6	60
11-0000	Management	167,680	6.6%	7	58
33-0000	Protective Service	101,880	4.0%	8	35
13-0000	Business and Financial Operations	101,030	4.0%	9	35
49-0000	Installation, Maintenance, and Repair	93,740	3.7%	10	33
25-0000	Educational Instruction and Library	58,390	2.3%	11	20
53-0000	Transportation and Material Moving	55,250	2.2%	12	19
15-0000	Computer and Mathematical	13,140	0.5%	13	5
47-0000	Construction and Extraction	9,870	0.4%	14	3
51-0000	Production	6,580	0.3%	15	2
29-0000	Healthcare Practitioners and Technical	6,260	0.2%	16	2
31-0000	Healthcare Support	4,540	0.2%	17	2
45-0000	Farming, Fishing, and Forestry	3,660	0.1%	18	1
19-0000	Life, Physical, and Social Science	3,470	0.1%	19	1
21-0000	Community and Social Service	2,220	0.1%	20	1
17-0000	Architecture and Engineering	1,390	0.1%	21	0
23-0000	Legal	950	0.0%	22	0
Total		**2,523,640**	**100.0%**		**876**
		876	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.15 – Wholesale Trade					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
53-0000	Transportation and Material Moving	1,465,580	24.4%	1	211
41-0000	Sales and Related	1,321,960	22.0%	2	190
43-0000	Office and Administrative Support	892,520	14.8%	3	128
11-0000	Management	605,370	10.1%	4	87
49-0000	Installation, Maintenance, and Repair	430,870	7.2%	5	62
13-0000	Business and Financial Operations	401,240	6.7%	6	58
51-0000	Production	337,240	5.6%	7	48
15-0000	Computer and Mathematical	196,230	3.3%	8	28
27-0000	Arts, Design, Entertainment, Sports, and Media	100,120	1.7%	9	14
17-0000	Architecture and Engineering	73,350	1.2%	10	11
45-0000	Farming, Fishing, and Forestry	45,390	0.8%	11	7
47-0000	Construction and Extraction	32,920	0.5%	12	5
29-0000	Healthcare Practitioners and Technical	32,680	0.5%	13	5
37-0000	Building and Grounds Cleaning and Maintenance	25,780	0.4%	14	4
19-0000	Life, Physical, and Social Science	24,670	0.4%	15	4
35-0000	Food Preparation and Serving Related	11,490	0.2%	16	2
23-0000	Legal	5,200	0.1%	17	1
33-0000	Protective Service	3,990	0.1%	18	1
31-0000	Healthcare Support	2,630	0.0%	19	0
39-0000	Personal Care and Service	1,910	0.0%	20	0
25-0000	Educational Instruction and Library	1,240	0.0%	21	0
21-0000	Community and Social Service	830	0.0%	22	0
Total		**6,013,210**	**100.0%**		**865**
		865	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.16 – Transportation & Warehousing					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
53-0000	Transportation and Material Moving	4,673,120	63.7%	1	418
43-0000	Office and Administrative Support	1,433,490	19.5%	2	128
49-0000	Installation, Maintenance, and Repair	360,170	4.9%	3	32
11-0000	Management	260,190	3.5%	4	23
13-0000	Business and Financial Operations	170,040	2.3%	5	15
41-0000	Sales and Related	91,470	1.2%	6	8
51-0000	Production	86,500	1.2%	7	8
33-0000	Protective Service	53,680	0.7%	8	5
15-0000	Computer and Mathematical	45,740	0.6%	9	4
37-0000	Building and Grounds Cleaning and Maintenance	43,590	0.6%	10	4
47-0000	Construction and Extraction	37,150	0.5%	11	3
17-0000	Architecture and Engineering	25,530	0.3%	12	2
19-0000	Life, Physical, and Social Science	18,790	0.3%	13	2
39-0000	Personal Care and Service	12,300	0.2%	14	1
27-0000	Arts, Design, Entertainment, Sports, and Media	7,940	0.1%	15	1
35-0000	Food Preparation and Serving Related	5,970	0.1%	16	1
45-0000	Farming, Fishing, and Forestry	2,980	0.0%	17	0
23-0000	Legal	1,500	0.0%	18	0
29-0000	Healthcare Practitioners and Technical	1,460	0.0%	19	0
25-0000	Educational Instruction and Library	1,350	0.0%	20	0
21-0000	Community and Social Service	230	0.0%	21	0
31-0000	Healthcare Support	190	0.0%	22	0
Total		**7,333,380**	**100.0%**		**657**
		657	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.17 – Management of Companies & Enterprises					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
13-0000	Business and Financial Operations Occupations	654,180	23.6%	1	15
11-0000	Management Occupations	593,600	21.4%	2	13
43-0000	Office and Administrative Support Occupations	547,900	19.8%	3	12
15-0000	Computer and Mathematical Occupations	345,890	12.5%	4	8
41-0000	Sales and Related Occupations	122,040	4.4%	5	3
17-0000	Architecture and Engineering Occupations	74,710	2.7%	6	2
29-0000	Healthcare Practitioners and Technical Occupations	71,380	2.6%	7	2
53-0000	Transportation and Material Moving Occupations	64,210	2.3%	8	1
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	51,320	1.9%	9	1
49-0000	Installation, Maintenance, and Repair Occupations	47,900	1.7%	10	1
23-0000	Legal Occupations	30,620	1.1%	11	1
19-0000	Life, Physical, and Social Science Occupations	28,160	1.0%	12	1
51-0000	Production Occupations	27,580	1.0%	13	1
21-0000	Community and Social Service Occupations	25,520	0.9%	14	1
35-0000	Food Preparation and Serving Related Occupations	19,670	0.7%	15	0
31-0000	Healthcare Support Occupations	18,910	0.7%	16	0
33-0000	Protective Service Occupations	12,060	0.4%	17	0
47-0000	Construction and Extraction Occupations	11,550	0.4%	18	0
37-0000	Building and Grounds Cleaning and Maintenance Occupations	9,600	0.3%	19	0
25-0000	Educational Instruction and Library Occupations	7,250	0.3%	20	0
39-0000	Personal Care and Service Occupations	5,650	0.2%	21	0
45-0000	Farming, Fishing, and Forestry Occupations	1,310	0.0%	22	0
Total		**2,771,010**	**100.0%**		**62**
		62	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.18 – Agriculture, Fishing, Forestry & Hunting					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
45-0000	Farming, Fishing, and Forestry Occupations	654,180	23.6%	1	15
53-0000	Transportation and Material Moving Occupations	593,600	21.4%	2	13
43-0000	Office and Administrative Support Occupations	547,900	19.8%	3	12
51-0000	Production Occupations	345,890	12.5%	4	8
11-0000	Management Occupations	122,040	4.4%	5	3
49-0000	Installation, Maintenance, and Repair Occupations	74,710	2.7%	6	2
39-0000	Personal Care and Service Occupations	71,380	2.6%	7	2
37-0000	Building and Grounds Cleaning and Maintenance Occupations	64,210	2.3%	8	1
13-0000	Business and Financial Operations Occupations	51,320	1.9%	9	1
41-0000	Sales and Related Occupations	47,900	1.7%	10	1
19-0000	Life, Physical, and Social Science Occupations	30,620	1.1%	11	1
47-0000	Construction and Extraction Occupations	28,160	1.0%	12	1
15-0000	Computer and Mathematical Occupations	27,580	1.0%	13	1
33-0000	Protective Service Occupations	25,520	0.9%	14	1
25-0000	Educational Instruction and Library Occupations	19,670	0.7%	15	0
17-0000	Architecture and Engineering Occupations	18,910	0.7%	16	0
29-0000	Healthcare Practitioners and Technical Occupations	12,060	0.4%	17	0
35-0000	Food Preparation and Serving Related Occupations	11,550	0.4%	18	0
Total		**413,230**	**100.0%**		**54**
		54	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.19 – Utilities					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
49-0000	Installation, Maintenance, and Repair Occupations	156,510	27.7%	1	5
43-0000	Office and Administrative Support Occupations	80,520	14.3%	2	3
51-0000	Production Occupations	75,930	13.4%	3	2
13-0000	Business and Financial Operations Occupations	54,190	9.6%	4	2
11-0000	Management Occupations	48,330	8.6%	5	2
17-0000	Architecture and Engineering Occupations	47,490	8.4%	6	1
47-0000	Construction and Extraction Occupations	38,270	6.8%	7	1
15-0000	Computer and Mathematical Occupations	19,340	3.4%	8	1
53-0000	Transportation and Material Moving Occupations	11,420	2.0%	9	0
19-0000	Life, Physical, and Social Science Occupations	10,660	1.9%	10	0
41-0000	Sales and Related Occupations	9,310	1.6%	11	0
33-0000	Protective Service Occupations	5,540	1.0%	12	0
37-0000	Building and Grounds Cleaning and Maintenance Occupations	2,820	0.5%	13	0
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	2,450	0.4%	14	0
23-0000	Legal Occupations	1,630	0.3%	15	0
45-0000	Farming, Fishing, and Forestry Occupations	170	0.0%	16	0
29-0000	Healthcare Practitioners and Technical Occupations	70	0.0%	17	0
25-0000	Educational Instruction and Library Occupations	50	0.0%	18	0
Total		**564,700**	**100.0%**		**18**
		18	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.a.20 – Mining					
SOC	Occupation	Nat'l. Empl.	Nat'l. Empl. Dstrb.	Rank	Est. Cape Coral Jobs
47-0000	Construction and Extraction Occupations	237,450	41.6%	1	5
53-0000	Transportation and Material Moving Occupations	79,320	13.9%	2	2
49-0000	Installation, Maintenance, and Repair Occupations	56,880	10.0%	3	1
11-0000	Management Occupations	45,630	8.0%	4	1
43-0000	Office and Administrative Support Occupations	38,190	6.7%	5	1
51-0000	Production Occupations	33,710	5.9%	6	1
17-0000	Architecture and Engineering Occupations	25,070	4.4%	7	1
13-0000	Business and Financial Operations Occupations	22,580	4.0%	8	0
19-0000	Life, Physical, and Social Science Occupations	12,190	2.1%	9	0
41-0000	Sales and Related Occupations	9,890	1.7%	10	0
15-0000	Computer and Mathematical Occupations	5,460	1.0%	11	0
23-0000	Legal Occupations	1,710	0.3%	12	0
33-0000	Protective Service Occupations	1,170	0.2%	13	0
37-0000	Building and Grounds Cleaning and Maintenance Occupations	1,010	0.2%	14	0
45-0000	Farming, Fishing, and Forestry Occupations	310	0.1%	15	0
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	250	0.0%	16	0
35-0000	Food Preparation and Serving Related Occupations	160	0.0%	17	0
29-0000	Healthcare Practitioners and Technical Occupations	100	0.0%	18	0
39-0000	Personal Care and Service Occupations	80	0.0%	19	0
Total		**571,160**	**100.0%**		**12**
		12	**Cape Coral Business Employment**		

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.b.1 – Cape Coral Jobs Shortfall Business & Financial Services Cluster					
SOC	Occupation	Shortfall Jobs	Jobs Dstrb.	Rank	Non-Reported in MSA
43-3071	Tellers	104	26.0%	1	
41-3031	Securities, Commodities, and Financial Services Sales Agents	36	9.0%	2	
13-2072	Loan Officers	34	8.5%	3	
41-9041	Telemarketers	28	7.0%	4	■
51-2090	Miscellaneous Assemblers and Fabricators	25	6.3%	5	
51-9199	Production Workers, All Other	24	6.0%	6	
43-4131	Loan Interviewers and Clerks	23	5.8%	7	
43-4141	New Accounts Clerks	15	3.8%	8	■
23-1011	Lawyers	12	3.0%	9	
43-3011	Bill and Account Collectors	10	2.5%	10	
43-6012	Legal Secretaries and Administrative Assistants	9	2.3%	11	
13-2041	Credit Analysts	8	2.0%	12	
13-2061	Financial Examiners	8	2.0%	12	
51-4081	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	8	2.0%	12	■
43-4011	Brokerage Clerks	7	1.8%	13	■
31-9094	Medical Transcriptionists	4	1.0%	14	
13-2054	Financial Risk Specialists	3	0.8%	15	
33-9091	Crossing Guards and Flaggers	3	0.8%	15	
43-3099	Financial Clerks, All Other	3	0.8%	15	
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	3	0.8%	15	■
27-3092	Court Reporters and Simultaneous Captioners	2	0.5%	16	■
31-9097	Phlebotomists	2	0.5%	16	■
51-4199	Metal Workers and Plastic Workers, All Other	2	0.5%	16	■
51-9198	Helpers--Production Workers	2	0.5%	16	
13-2052	Personal Financial Advisors	1	0.3%	17	
13-2099	Financial Specialists, All Other	1	0.3%	17	
17-2081	Environmental Engineers	1	0.3%	17	■
17-3026	Industrial Engineering Technologists and Technicians	1	0.3%	17	■
19-1042	Medical Scientists, Except Epidemiologists	1	0.3%	17	■
19-2031	Chemists	1	0.3%	17	■
19-2042	Geoscientists, Except Hydrologists and Geographers	1	0.3%	17	■
33-1011	First-Line Supervisors of Correctional Officers	1	0.3%	17	
33-3012	Correctional Officers and Jailers	1	0.3%	17	

35-2019	Cooks, All Other	1	0.3%	17	■
43-2011	Switchboard Operators, Including Answering Service	1	0.3%	17	
43-4041	Credit Authorizers, Checkers, and Clerks	1	0.3%	17	■
47-2231	Solar Photovoltaic Installers	1	0.3%	17	■
49-9043	Maintenance Workers, Machinery	1	0.3%	17	■
49-9044	Millwrights	1	0.3%	17	■
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	1	0.3%	17	■
51-3023	Slaughterers and Meat Packers	1	0.3%	17	■
51-4021	Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	1	0.3%	17	■
51-4033	Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	1	0.3%	17	■
51-4122	Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	1	0.3%	17	■
51-5113	Print Binding and Finishing Workers	1	0.3%	17	■
51-8021	Stationary Engineers and Boiler Operators	1	0.3%	17	
51-9041	Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	1	0.3%	17	■
51-9111	Packaging and Filling Machine Operators and Tenders	1	0.3%	17	
53-7063	Machine Feeders and Offbearers	1	0.3%	17	■
	Total Jobs	**400**	**100%**		
	Total # of Occupations			**49**	
	Total # of Occupations non-reported in MSA				**26**

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.b.2 – Cape Coral Jobs Shortfall Community Services Cluster

SOC	Occupation	Jobs Shortfall	Jobs Dstrb.	Rank	Non-Reported in MSA
33-3051	Police and Sheriff's Patrol Officers	148	15.7%	1	
33-3012	Correctional Officers and Jailers	118	12.5%	2	
47-4051	Highway Maintenance Workers	55	5.8%	3	■
33-2011	Firefighters	47	5.0%	4	
53-3052	Bus Drivers, Transit and Intercity	47	5.0%	4	■
21-1092	Probation Officers and Correctional Treatment Specialists	34	3.6%	5	■
33-1012	First-Line Supervisors of Police and Detectives	31	3.3%	6	
43-4031	Court, Municipal, and License Clerks	25	2.7%	7	
43-4061	Eligibility Interviewers, Government Programs	25	2.7%	7	

33-1011	First-Line Supervisors of Correctional Officers	20	2.1%	8	■
43-4121	Library Assistants, Clerical	20	2.1%	8	■
43-5031	Public Safety Telecommunicators	20	2.1%	8	
33-3021	Detectives and Criminal Investigators	19	2.0%	9	
25-4031	Library Technicians	17	1.8%	10	■
51-8031	Water and Wastewater Treatment Plant and System Operators	15	1.6%	11	
15-1299	Computer Occupations, All Other	14	1.5%	12	
33-1021	First-Line Supervisors of Firefighting and Prevention Workers	12	1.3%	13	
23-1023	Judges, Magistrate Judges, and Magistrates	10	1.1%	14	■
19-4071	Forest and Conservation Technicians	9	1.0%	15	■
11-1031	Legislators	8	0.8%	16	
19-3099	Social Scientists and Related Workers, All Other	8	0.8%	16	■
13-2081	Tax Examiners and Collectors, and Revenue Agents	7	0.7%	17	
17-2199	Engineers, All Other	7	0.7%	17	
21-1015	Rehabilitation Counselors	7	0.7%	17	
19-1031	Conservation Scientists	6	0.6%	18	■
23-1021	Administrative Law Judges, Adjudicators, and Hearing Officers	6	0.6%	18	■
25-4022	Librarians and Media Collections Specialists	6	0.6%	18	
29-1299	Healthcare Diagnosing or Treating Practitioners, All Other	6	0.6%	18	■
33-3011	Bailiffs	6	0.6%	18	■
33-9091	Crossing Guards and Flaggers	6	0.6%	18	
53-2021	Air Traffic Controllers	6	0.6%	18	■
17-2081	Environmental Engineers	5	0.5%	19	■
23-1012	Judicial Law Clerks	5	0.5%	19	■
33-9092	Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers	5	0.5%	19	
43-4199	Information and Record Clerks, All Other	5	0.5%	19	
53-4041	Subway and Streetcar Operators	5	0.5%	19	■
53-6051	Transportation Inspectors	5	0.5%	19	■
11-9039	Education Administrators, All Other	4	0.4%	20	■
19-1023	Zoologists and Wildlife Biologists	4	0.4%	20	■
19-2031	Chemists	4	0.4%	20	■
19-2099	Physical Scientists, All Other	4	0.4%	20	■
19-3011	Economists	4	0.4%	20	■
19-3051	Urban and Regional Planners	4	0.4%	20	
19-4099	Life, Physical, and Social Science Technicians, All Other	4	0.4%	20	■
27-3092	Court Reporters and Simultaneous Captioners	4	0.4%	20	■
33-9011	Animal Control Workers	4	0.4%	20	■
43-5041	Meter Readers, Utilities	4	0.4%	20	■

13-2099	Financial Specialists, All Other	3	0.3%	21	
15-1221	Computer and Information Research Scientists	3	0.3%	21	■
15-2041	Statisticians	3	0.3%	21	■
17-2011	Aerospace Engineers	3	0.3%	21	■
17-2072	Electronics Engineers, Except Computer	3	0.3%	21	
17-3029	Engineering Technologists and Technicians, Except Drafters, All Other	3	0.3%	21	
19-1029	Biological Scientists, All Other	3	0.3%	21	
19-1041	Epidemiologists	3	0.3%	21	■
19-3039	Psychologists, All Other	3	0.3%	21	■
25-3099	Teachers and Instructors, All Other	3	0.3%	21	
31-1133	Psychiatric Aides	3	0.3%	21	■
33-3031	Fish and Game Wardens	3	0.3%	21	■
45-2011	Agricultural Inspectors	3	0.3%	21	■
53-4031	Railroad Conductors and Yardmasters	3	0.3%	21	■
53-6041	Traffic Technicians	3	0.3%	21	■
13-1031	Claims Adjusters, Examiners, and Investigators	2	0.2%	22	
13-2020	Property Appraisers and Assessors	2	0.2%	22	
17-1021	Cartographers and Photogrammetrists	2	0.2%	22	■
17-2061	Computer Hardware Engineers	2	0.2%	22	■
17-3022	Civil Engineering Technologists and Technicians	2	0.2%	22	
19-1022	Microbiologists	2	0.2%	22	■
19-2042	Geoscientists, Except Hydrologists and Geographers	2	0.2%	22	■
21-1019	Counselors, All Other	2	0.2%	22	■
33-3041	Parking Enforcement Workers	2	0.2%	22	■
33-9094	School Bus Monitors	2	0.2%	22	■
47-4061	Rail-Track Laying and Maintenance Equipment Operators	2	0.2%	22	■
47-4071	Septic Tank Servicers and Sewer Pipe Cleaners	2	0.2%	22	■
49-2095	Electrical and Electronics Repairers, Powerhouse, Substation, and Relay	2	0.2%	22	■
51-8021	Stationary Engineers and Boiler Operators	2	0.2%	22	■
53-5011	Sailors and Marine Oilers	2	0.2%	22	■
11-9161	Emergency Management Directors	1	0.1%	23	
17-2161	Nuclear Engineers	1	0.1%	23	■
17-3025	Environmental Engineering Technologists and Technicians	1	0.1%	23	■
19-1032	Foresters	1	0.1%	23	■
19-2012	Physicists	1	0.1%	23	■
19-2021	Atmospheric and Space Scientists	1	0.1%	23	■
19-3091	Anthropologists and Archeologists	1	0.1%	23	■
19-3094	Political Scientists	1	0.1%	23	■
19-4044	Hydrologic Technicians	1	0.1%	23	■

21-1021	Child, Family, and School Social Workers	1	0.1%	23	
21-1094	Community Health Workers	1	0.1%	23	
23-1022	Arbitrators, Mediators, and Conciliators	1	0.1%	23	■
23-2099	Legal Support Workers, All Other	1	0.1%	23	
25-3011	Adult Basic Education, Adult Secondary Education, and English as a Second Language Instructors	1	0.1%	23	■
25-4013	Museum Technicians and Conservators	1	0.1%	23	■
27-1019	Artists and Related Workers, All Other	1	0.1%	23	■
27-4099	Media and Communication Equipment Workers, All Other	1	0.1%	23	■
29-1125	Recreational Therapists	1	0.1%	23	■
29-1223	Psychiatrists	1	0.1%	23	■
33-2021	Fire Inspectors and Investigators	1	0.1%	23	
33-3052	Transit and Railroad Police	1	0.1%	23	■
39-9099	Personal Care and Service Workers, All Other	1	0.1%	23	■
45-1011	First-Line Supervisors of Farming, Fishing, and Forestry Workers	1	0.1%	23	■
45-4011	Forest and Conservation Workers	1	0.1%	23	■
49-2093	Electrical and Electronics Installers and Repairers, Transportation Equipment	1	0.1%	23	■
49-3043	Rail Car Repairers	1	0.1%	23	■
49-9043	Maintenance Workers, Machinery	1	0.1%	23	■
49-9069	Precision Instrument and Equipment Repairers, All Other	1	0.1%	23	■
49-9097	Signal and Track Switch Repairers	1	0.1%	23	■
51-8099	Plant and System Operators, All Other	1	0.1%	23	■
53-2011	Airline Pilots, Copilots, and Flight Engineers	1	0.1%	23	■
53-3011	Ambulance Drivers and Attendants, Except Emergency Medical Technicians	1	0.1%	23	■
	Total Jobs	**942**	**100.0%**		
	Total # of Occupations			**109**	
	Total # of Occupations non-reported in MSA				**76**

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.b.3 – Cape Coral Jobs Shortfall
Consumer Products & Services Cluster

SOC	Occupation	Jobs Shortfall	Jobs Dstrb.	Rank	Non-Reported in MSA
41-4011	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	12	40.0%	1	
49-9062	Shipping, Receiving, and Inventory Clerks	5	16.7%	2	
49-3091	Bicycle Repairers	4	13.3%	3	■
27-1023	Floral Designers	3	10.0%	4	

41-9031	Production, Planning, and Expediting Clerks	2	6.7%	5	■
17-2031	Electric Motor, Power Tool, and Related Repairers	1	3.3%	6	■
49-9063	Musical Instrument Repairers and Tuners	1	3.3%	6	■
49-9069	Billing and Posting Clerks	1	3.3%	6	■
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	1	3.3%	6	■
	Total Jobs	**30**	**100.0%**		
	Total # of Occupations			**9**	
	Total # of Occupations non-reported in MSA				**6**

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.b.4 – Cape Coral Jobs Shortfall Culinary Tourism Cluster					
SOC	Occupation	Jobs Shortfall	Jobs Dstrb.	Rank	Non-Reported in MSA
35-9099	Food Preparation and Serving Related Workers, All Other	1	50.0%	1	■
35-2019	Cooks, All Other	1	50.0%	1	■
	Total Jobs	**2**	**100.0%**		
	Total # of Occupations			**2**	
	Total # of Occupations non-reported in MSA				**2**

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.b.5 – Cape Coral Jobs Shortfall Healthcare & Life Sciences Cluster					
SOC	Occupation	Jobs Shortfall	Jobs Dstrb.	Rank	Non-Reported in MSA
29-1141	Registered Nurses	88	31.4%	1	
31-9097	Phlebotomists	36	12.9%	2	■
19-1042	Medical Scientists, Except Epidemiologists	18	6.4%	3	■
31-1120	Home Health and Personal Care Aides	16	5.7%	4	
29-1126	Respiratory Therapists	9	3.2%	5	
29-1224	Radiologists	8	2.9%	6	■
29-1071	Physician Assistants	7	2.5%	7	
29-1249	Surgeons, All Other	6	2.1%	8	■
29-2055	Surgical Technologists	6	2.1%	8	
29-2034	Radiologic Technologists and Technicians	5	1.8%	9	
31-9093	Medical Equipment Preparers	5	1.8%	9	
29-1124	Radiation Therapists	4	1.4%	10	■

29-1215	Family Medicine Physicians	4	1.4%	10	
29-1218	Obstetricians and Gynecologists	4	1.4%	10	■
29-1223	Psychiatrists	4	1.4%	10	■
29-2032	Diagnostic Medical Sonographers	4	1.4%	10	
19-1021	Biochemists and Biophysicists	3	1.1%	11	■
29-1212	Cardiologists	3	1.1%	11	■
29-1213	Dermatologists	3	1.1%	11	■
29-1221	Pediatricians, General	3	1.1%	11	
29-1242	Orthopedic Surgeons, Except Pediatric	3	1.1%	11	■
29-9093	Surgical Assistants	3	1.1%	11	■
31-1133	Psychiatric Aides	3	1.1%	11	■
17-2061	Computer Hardware Engineers	2	0.7%	12	■
19-2031	Chemists	2	0.7%	12	■
19-4099	Life, Physical, and Social Science Technicians, All Other	2	0.7%	12	■
29-1125	Recreational Therapists	2	0.7%	12	■
29-1211	Anesthesiologists	2	0.7%	12	
29-1217	Neurologists	2	0.7%	12	■
29-1222	Physicians, Pathologists	2	0.7%	12	■
29-1241	Ophthalmologists, Except Pediatric	2	0.7%	12	■
53-3011	Ambulance Drivers and Attendants, Except Emergency Medical Technicians	2	0.7%	12	■
15-1221	Computer and Information Research Scientists	1	0.4%	13	■
15-2041	Statisticians	1	0.4%	13	■
17-2011	Aerospace Engineers	1	0.4%	13	■
17-2031	Bioengineers and Biomedical Engineers	1	0.4%	13	■
17-3027	Mechanical Engineering Technologists and Technicians	1	0.4%	13	■
19-1022	Microbiologists	1	0.4%	13	■
19-2012	Physicists	1	0.4%	13	■
19-4021	Biological Technicians	1	0.4%	13	
19-4031	Chemical Technicians	1	0.4%	13	■
19-4061	Social Science Research Assistants	1	0.4%	13	■
29-1128	Exercise Physiologists	1	0.4%	13	■
29-1161	Nurse Midwives	1	0.4%	13	■
29-1181	Audiologists	1	0.4%	13	■
29-9099	Healthcare Practitioners and Technical Workers, All Other	1	0.4%	13	
31-9094	Medical Transcriptionists	1	0.4%	13	

51-8021	Stationary Engineers and Boiler Operators	1	0.4%	13	■
51-9083	Ophthalmic Laboratory Technicians	1	0.4%	13	■
	Total Jobs	**280**	**100.0%**		
	Total # of Occupations			**49**	
	Total # of Occupations non-reported in MSA				**35**

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.b.6 – Cape Coral Jobs Shortfall Industrial Services Cluster

SOC	Occupation	Jobs Shortfall	Jobs Dstrb.	Rank	Non-Reported in MSA
49-3041	Farm Equipment Mechanics and Service Technicians	3	21.4%	1	■
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	2	14.3%	2	■
51-4033	Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	2	14.3%	2	■
51-4193	Plating Machine Setters, Operators, and Tenders, Metal and Plastic	2	14.3%	2	■
49-9044	Millwrights	1	7.1%	3	■
49-9081	Wind Turbine Service Technicians	1	7.1%	3	■
51-4034	Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	1	7.1%	3	■
51-4081	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	1	7.1%	3	■
51-4111	Tool and Die Makers	1	7.1%	3	■
	Total Jobs	**14**	**100.0%**		
	Total # of Occupations			**9**	
	Total # of Occupations non-reported in MSA				**9**

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.b.7 – Cape Coral Jobs Shortfall IT & Media Cluster

SOC	Occupation	Jobs Shortfall	Jobs Dstrb.	Rank	Non-Reported in MSA
15-1252	Software Developers	12	36.4%	1	
27-1014	Special Effects Artists and Animators	4	12.1%	2	■
17-2061	Computer Hardware Engineers	3	9.1%	3	■
27-2011	Actors	3	9.1%	3	■
41-9031	Sales Engineers	3	9.1%	3	■
15-1221	Computer and Information Research Scientists	2	6.1%	4	■

27-3011	Broadcast Announcers and Radio Disc Jockeys	2	6.1%	4	
27-4014	Sound Engineering Technicians	2	6.1%	4	■
49-2097	Audiovisual Equipment Installers and Repairers	1	3.0%	5	■
49-9069	Precision Instrument and Equipment Repairers, All Other	1	3.0%	5	■
	Total Jobs	**33**	**100.0%**		
	Total # of Occupations			**10**	
	Total # of Occupations non-reported in MSA				**8**

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.b.8 – Cape Coral Jobs Shortfall Sustainable Real Estate Cluster

SOC	Occupation	Jobs Shortfall	Jobs Dstrb.	Rank	Non-Reported in MSA
17-1011	Architects, Except Landscape and Naval	6	35.3%	1	
11-9041	Architectural and Engineering Managers	1	5.9%	2	
17-2011	Aerospace Engineers	1	5.9%	2	■
17-2061	Computer Hardware Engineers	1	5.9%	2	■
17-2081	Environmental Engineers	1	5.9%	2	■
17-3025	Environmental Engineering Technologists and Technicians	1	5.9%	2	■
17-3026	Industrial Engineering Technologists and Technicians	1	5.9%	2	■
17-3027	Mechanical Engineering Technologists and Technicians	1	5.9%	2	■
19-2031	Chemists	1	5.9%	2	■
19-2042	Geoscientists, Except Hydrologists and Geographers	1	5.9%	2	■
19-4031	Chemical Technicians	1	5.9%	2	■
19-4043	Geological Technicians, Except Hydrologic Technicians	1	5.9%	2	■
	Total Jobs	**17**	**100.0%**		
	Total # of Occupations			**12**	
	Total # of Occupations non-reported in MSA				**10**

Source: Bureau of Labor Statistics (2023)

Appendix Table 10.b.9 - Employment Shortfall Jobs Summary for Target Clusters

SOC	Occupation	# of Jobs	Rank	Non-Reported in MSA	Typical education needed for entry	Work experience in a related occupation	Typical on-the-job training needed to attain competency in the occupation
33-3051	Police and Sheriff's Patrol Officers	148	1		High school diploma or equivalent	None	Moderate-term on-the-job training
33-3012	Correctional Officers and Jailers	119	2		High school diploma or equivalent	None	Moderate-term on-the-job training
43-3071	Tellers	104	3		High school diploma or equivalent	None	Short-term on-the-job training
29-1141	Registered Nurses	88	4		Bachelor's degree	None	None
47-4051	Highway Maintenance Workers	55	5	■	High school diploma or equivalent	None	Moderate-term on-the-job training
33-2011	Firefighters	47	6		Postsecondary nondegree award	None	Long-term on-the-job training
53-3052	Bus Drivers, Transit and Intercity	47	6	■	High school diploma or equivalent	None	Moderate-term on-the-job training
31-9097	Phlebotomists	38	7	■	Postsecondary nondegree award	None	None
41-3031	Securities, Commodities, and Financial Services Sales Agents	36	8		Bachelor's degree	None	Moderate-term on-the-job training
13-2072	Loan Officers	34	9		Bachelor's degree	Less than 5 years	Moderate-term on-the-job training
21-1092	Probation Officers and Correctional Treatment Specialists	34	9	■	Bachelor's degree	None	Moderate-term on-the-job training
33-1012	First-Line Supervisors of Police and Detectives	31	10		High school diploma or equivalent	Less than 5 years	Moderate-term on-the-job training
41-9041	Telemarketers	28	11	■	No formal educational credential	None	Short-term on-the-job training
43-4031	Court, Municipal, and License Clerks	25	12		High school diploma or equivalent	None	Long-term on-the-job training
43-4061	Eligibility Interviewers, Government Programs	25	12		High school diploma or equivalent	None	Moderate-term on-the-job training

51-2090	Miscellaneous Assemblers and Fabricators	25	12		High school diploma or equivalent	None	Moderate-term on-the-job training
51-9199	Production Workers, All Other	24	13		High school diploma or equivalent	None	Moderate-term on-the-job training
43-4131	Loan Interviewers and Clerks	23	14		High school diploma or equivalent	None	Short-term on-the-job training
33-1011	First-Line Supervisors of Correctional Officers	21	15	■	High school diploma or equivalent	Less than 5 years	None
43-4121	Library Assistants, Clerical	20	16	■	High school diploma or equivalent	None	Short-term on-the-job training
43-5031	Public Safety Telecommunicators	20	16		High school diploma or equivalent	None	Moderate-term on-the-job training
19-1042	Medical Scientists, Except Epidemiologists	19	17	■	Doctoral or professional degree	None	None
33-3021	Detectives and Criminal Investigators	19	17		High school diploma or equivalent	Less than 5 years	Moderate-term on-the-job training
25-4031	Library Technicians	17	18	■	Postsecondary nondegree award	None	None
31-1120	Home Health and Personal Care Aides	16	19		High school diploma or equivalent	None	Short-term on-the-job training
43-4141	New Accounts Clerks	15	20	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-8031	Water and Wastewater Treatment Plant and System Operators	15	20		High school diploma or equivalent	None	Long-term on-the-job training
15-1299	Computer Occupations, All Other	14	21		Bachelor's degree	None	None
15-1252	Software Developers	12	22		Bachelor's degree	None	None
23-1011	Lawyers	12	22		Doctoral or professional degree	None	None
33-1021	First-Line Supervisors of Firefighting and Prevention Workers	12	22		Postsecondary nondegree award	Less than 5 years	Moderate-term on-the-job training
41-4011	Sales Representatives, Wholesale and Manufacturing, Except	12	22		Bachelor's degree	None	Moderate-term on-the-job training

	Technical and Scientific Products						
23-1023	Judges, Magistrate Judges, and Magistrates	10	23	■	Doctoral or professional degree	5 years or more	Short-term on-the-job training
43-3011	Bill and Account Collectors	10	23		High school diploma or equivalent	None	Moderate-term on-the-job training
19-4071	Forest and Conservation Technicians	9	24	■	Associate's degree	None	None
29-1126	Respiratory Therapists	9	24		Associate's degree	None	None
33-9091	Crossing Guards and Flaggers	9	24		No formal educational credential	None	Short-term on-the-job training
43-6012	Legal Secretaries and Administrative Assistants	9	24		High school diploma or equivalent	None	Moderate-term on-the-job training
51-4081	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	9	24	■	High school diploma or equivalent	None	Moderate-term on-the-job training
11-1031	Legislators	8	25		Bachelor's degree	Less than 5 years	None
13-2041	Credit Analysts	8	25		Bachelor's degree	None	None
13-2061	Financial Examiners	8	25		Bachelor's degree	None	Long-term on-the-job training
17-2061	Computer Hardware Engineers	8	25	■	Bachelor's degree	None	None
19-2031	Chemists	8	25	■	Bachelor's degree	None	None
19-3099	Social Scientists and Related Workers, All Other	8	25	■	Bachelor's degree	None	None
29-1224	Radiologists	8	25	■	Doctoral or professional degree	None	Internship/residency
13-2081	Tax Examiners and Collectors, and Revenue Agents	7	26		Bachelor's degree	None	Moderate-term on-the-job training
17-2081	Environmental Engineers	7	26	■	Bachelor's degree	None	None
17-2199	Engineers, All Other	7	26		Bachelor's degree	None	None

21-1015	Rehabilitation Counselors	7	26		Master's degree	None	None
29-1071	Physician Assistants	7	26		Master's degree	None	None
43-4011	Brokerage Clerks	7	26	■	High school diploma or equivalent	None	Moderate-term on-the-job training
15-1221	Computer and Information Research Scientists	6	27	■	Master's degree	None	None
17-1011	Architects, Except Landscape and Naval	6	27		Bachelor's degree	None	Internship/residency
19-1031	Conservation Scientists	6	27	■	Bachelor's degree	None	None
19-4099	Life, Physical, and Social Science Technicians, All Other	6	27	■	Associate's degree	None	None
23-1021	Administrative Law Judges, Adjudicators, and Hearing Officers	6	27	■	Doctoral or professional degree	5 years or more	Short-term on-the-job training
25-4022	Librarians and Media Collections Specialists	6	27		Master's degree	None	None
27-3092	Court Reporters and Simultaneous Captioners	6	27	■	Postsecondary nondegree award	None	Short-term on-the-job training
29-1249	Surgeons, All Other	6	27	■	Doctoral or professional degree	None	Internship/residency
29-1299	Healthcare Diagnosing or Treating Practitioners, All Other	6	27	■	Master's degree	None	None
29-2055	Surgical Technologists	6	27		Postsecondary nondegree award	None	None
31-1133	Psychiatric Aides	6	27	■	High school diploma or equivalent	None	Short-term on-the-job training
33-3011	Bailiffs	6	27	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	6	27	■	High school diploma or equivalent	None	Moderate-term on-the-job training
53-2021	Air Traffic Controllers	6	27	■	Associate's degree	None	Long-term on-the-job training
17-2011	Aerospace Engineers	5	28	■	Bachelor's degree	None	None

23-1012	Judicial Law Clerks	5	28	■	Doctoral or professional degree	None	None
29-1223	Psychiatrists	5	28	■	Doctoral or professional degree	None	Internship/residency
29-2034	Radiologic Technologists and Technicians	5	28		Associate's degree	None	None
31-9093	Medical Equipment Preparers	5	28		High school diploma or equivalent	None	Moderate-term on-the-job training
31-9094	Medical Transcriptionists	5	28		Postsecondary nondegree award	None	None
33-9092	Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers	5	28		No formal educational credential	None	Short-term on-the-job training
41-9031	Production, Planning, and Expediting Clerks	5	28	■	Bachelor's degree	None	Moderate-term on-the-job training
43-4199	Information and Record Clerks, All Other	5	28		High school diploma or equivalent	None	Short-term on-the-job training
49-9062	Shipping, Receiving, and Inventory Clerks	5	28		Associate's degree	None	Moderate-term on-the-job training
53-4041	Subway and Streetcar Operators	5	28	■	High school diploma or equivalent	None	Moderate-term on-the-job training
53-6051	Transportation Inspectors	5	28	■	High school diploma or equivalent	None	Moderate-term on-the-job training
11-9039	Education Administrators, All Other	4	29	■	Bachelor's degree	Less than 5 years	None
13-2099	Financial Specialists, All Other	4	29		Bachelor's degree	None	None
15-2041	Statisticians	4	29	■	Master's degree	None	None
19-1023	Zoologists and Wildlife Biologists	4	29	■	Bachelor's degree	None	None
19-2042	Geoscientists, Except Hydrologists and Geographers	4	29	■	Bachelor's degree	None	None
19-2099	Physical Scientists, All Other	4	29	■	Bachelor's degree	None	None
19-3011	Economists	4	29	■	Master's degree	None	None

19-3051	Urban and Regional Planners	4	29		Master's degree	None	None
27-1014	Special Effects Artists and Animators	4	29	■	Bachelor's degree	None	None
29-1124	Radiation Therapists	4	29	■	Associate's degree	None	None
29-1215	Family Medicine Physicians	4	29		Doctoral or professional degree	None	Internship/residency
29-1218	Obstetricians and Gynecologists	4	29	■	Doctoral or professional degree	None	Internship/residency
29-2032	Diagnostic Medical Sonographers	4	29		Associate's degree	None	None
33-9011	Animal Control Workers	4	29	■	High school diploma or equivalent	None	Moderate-term on-the-job training
43-5041	Meter Readers, Utilities	4	29	■	High school diploma or equivalent	None	Short-term on-the-job training
49-3091	Bicycle Repairers	4	29	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-8021	Stationary Engineers and Boiler Operators	4	29	■	High school diploma or equivalent	None	Long-term on-the-job training
13-2054	Financial Risk Specialists	3	30		Bachelor's degree	None	None
17-2072	Electronics Engineers, Except Computer	3	30		Bachelor's degree	None	None
17-3029	Engineering Technologists and Technicians, Except Drafters, All Other	3	30		Associate's degree	None	None
19-1021	Biochemists and Biophysicists	3	30	■	Doctoral or professional degree	None	None
19-1022	Microbiologists	3	30	■	Bachelor's degree	None	None
19-1029	Biological Scientists, All Other	3	30		Bachelor's degree	None	None
19-1041	Epidemiologists	3	30	■	Master's degree	None	None
19-3039	Psychologists, All Other	3	30	■	Master's degree	None	Internship/residency

25-3099	Teachers and Instructors, All Other	3	30		Bachelor's degree	None	None
27-1023	Floral Designers	3	30		High school diploma or equivalent	None	Moderate-term on-the-job training
27-2011	Actors	3	30	■	Some college, no degree	None	Long-term on-the-job training
29-1125	Recreational Therapists	3	30	■	Bachelor's degree	None	None
29-1212	Cardiologists	3	30	■	Doctoral or professional degree	None	Internship/residency
29-1213	Dermatologists	3	30	■	Doctoral or professional degree	None	Internship/residency
29-1221	Pediatricians, General	3	30		Doctoral or professional degree	None	Internship/residency
29-1242	Orthopedic Surgeons, Except Pediatric	3	30	■	Doctoral or professional degree	None	Internship/residency
29-9093	Surgical Assistants	3	30	■	Postsecondary nondegree award	None	None
33-3031	Fish and Game Wardens	3	30	■	Bachelor's degree	None	Moderate-term on-the-job training
43-3099	Financial Clerks, All Other	3	30		High school diploma or equivalent	None	Short-term on-the-job training
45-2011	Agricultural Inspectors	3	30	■	Bachelor's degree	None	Moderate-term on-the-job training
49-3041	Farm Equipment Mechanics and Service Technicians	3	30	■	High school diploma or equivalent	None	Long-term on-the-job training
49-9069	Precision Instrument and Equipment Repairers, All Other	3	30	■	High school diploma or equivalent	None	Long-term on-the-job training
51-4033	Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	3	30	■	High school diploma or equivalent	None	Moderate-term on-the-job training
53-3011	Ambulance Drivers and Attendants, Except Emergency Medical Technicians	3	30	■	High school diploma or equivalent	None	Moderate-term on-the-job training

53-4031	Railroad Conductors and Yardmasters	3	30	■	High school diploma or equivalent	None	Moderate-term on-the-job training
53-6041	Traffic Technicians	3	30	■	High school diploma or equivalent	None	Moderate-term on-the-job training
13-1031	Claims Adjusters, Examiners, and Investigators	2	31		High school diploma or equivalent	None	Long-term on-the-job training
13-2020	Property Appraisers and Assessors	2	31		Bachelor's degree	None	Long-term on-the-job training
17-1021	Cartographers and Photogrammetrists	2	31	■	Bachelor's degree	None	None
17-2031	Electric Motor, Power Tool, and Related Repairers	2	31	■	Bachelor's degree	None	None
17-3022	Civil Engineering Technologists and Technicians	2	31		Associate's degree	None	None
17-3025	Environmental Engineering Technologists and Technicians	2	31	■	Associate's degree	None	None
17-3026	Industrial Engineering Technologists and Technicians	2	31	■	Associate's degree	None	None
17-3027	Mechanical Engineering Technologists and Technicians	2	31	■	Associate's degree	None	None
19-2012	Physicists	2	31	■	Doctoral or professional degree	None	None
19-4031	Chemical Technicians	2	31	■	Associate's degree	None	Moderate-term on-the-job training
21-1019	Counselors, All Other	2	31	■	Master's degree	None	None
27-3011	Broadcast Announcers and Radio Disc Jockeys	2	31		Bachelor's degree	None	None
27-4014	Sound Engineering Technicians	2	31	■	Postsecondary nondegree award	None	Short-term on-the-job training
29-1211	Anesthesiologists	2	31		Doctoral or professional degree	None	Internship/residency
29-1217	Neurologists	2	31	■	Doctoral or professional degree	None	Internship/residency

29-1222	Physicians, Pathologists	2	31	■	Doctoral or professional degree	None	Internship/residency
29-1241	Ophthalmologists, Except Pediatric	2	31	■	Doctoral or professional degree	None	Internship/residency
33-3041	Parking Enforcement Workers	2	31	■	High school diploma or equivalent	None	Short-term on-the-job training
33-9094	School Bus Monitors	2	31	■	High school diploma or equivalent	None	Short-term on-the-job training
35-2019	Cooks, All Other	2	31	■	No formal educational credential	None	Moderate-term on-the-job training
47-4061	Rail-Track Laying and Maintenance Equipment Operators	2	31	■	High school diploma or equivalent	None	Moderate-term on-the-job training
47-4071	Septic Tank Servicers and Sewer Pipe Cleaners	2	31	■	High school diploma or equivalent	None	Moderate-term on-the-job training
49-2095	Electrical and Electronics Repairers, Powerhouse, Substation, and Relay	2	31	■	Postsecondary nondegree award	Less than 5 years	Moderate-term on-the-job training
49-9043	Maintenance Workers, Machinery	2	31	■	High school diploma or equivalent	None	Long-term on-the-job training
49-9044	Millwrights	2	31	■	High school diploma or equivalent	None	Apprenticeship
51-4193	Plating Machine Setters, Operators, and Tenders, Metal and Plastic	2	31	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-4199	Metal Workers and Plastic Workers, All Other	2	31	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-9198	Helpers--Production Workers	2	31		High school diploma or equivalent	None	Short-term on-the-job training
53-5011	Sailors and Marine Oilers	2	31	■	No formal educational credential	None	Moderate-term on-the-job training
11-9041	Architectural and Engineering Managers	1	32		Bachelor's degree	5 years or more	None
11-9161	Emergency Management Directors	1	32		Bachelor's degree	5 years or more	None
13-2052	Personal Financial Advisors	1	32		Bachelor's degree	None	Long-term on-the-job training

17-2161	Nuclear Engineers	1	32	■	Bachelor's degree	None	None
19-1032	Foresters	1	32	■	Bachelor's degree	None	None
19-2021	Atmospheric and Space Scientists	1	32	■	Bachelor's degree	None	None
19-3091	Anthropologists and Archeologists	1	32	■	Master's degree	None	None
19-3094	Political Scientists	1	32	■	Master's degree	None	None
19-4021	Biological Technicians	1	32		Bachelor's degree	None	None
19-4043	Geological Technicians, Except Hydrologic Technicians	1	32	■	Associate's degree	None	Moderate-term on-the-job training
19-4044	Hydrologic Technicians	1	32	■	Associate's degree	None	Moderate-term on-the-job training
19-4061	Social Science Research Assistants	1	32	■	Bachelor's degree	None	None
21-1021	Child, Family, and School Social Workers	1	32		Bachelor's degree	None	None
21-1094	Community Health Workers	1	32		High school diploma or equivalent	None	Short-term on-the-job training
23-1022	Arbitrators, Mediators, and Conciliators	1	32	■	Bachelor's degree	Less than 5 years	Moderate-term on-the-job training
23-2099	Legal Support Workers, All Other	1	32		Associate's degree	None	None
25-3011	Adult Basic Education, Adult Secondary Education, and English as a Second Language Instructors	1	32	■	Bachelor's degree	None	None
25-4013	Museum Technicians and Conservators	1	32	■	Bachelor's degree	None	None
27-1019	Artists and Related Workers, All Other	1	32	■	No formal educational credential	None	Long-term on-the-job training
27-4099	Media and Communication Equipment Workers, All Other	1	32	■	High school diploma or equivalent	None	Short-term on-the-job training
29-1128	Exercise Physiologists	1	32	■	Bachelor's degree	None	None

29-1161	Nurse Midwives	1	32	■	Master's degree	None	None
29-1181	Audiologists	1	32	■	Doctoral or professional degree	None	None
29-9099	Healthcare Practitioners and Technical Workers, All Other	1	32		Postsecondary nondegree award	None	None
33-2021	Fire Inspectors and Investigators	1	32		Postsecondary nondegree award	5 years or more	Moderate-term on-the-job training
33-3052	Transit and Railroad Police	1	32		High school diploma or equivalent	None	Moderate-term on-the-job training
35-9099	Food Preparation and Serving Related Workers, All Other	1	32	■	No formal educational credential	None	Short-term on-the-job training
39-9099	Personal Care and Service Workers, All Other	1	32	■	High school diploma or equivalent	None	Short-term on-the-job training
43-2011	Switchboard Operators, Including Answering Service	1	32		High school diploma or equivalent	None	Short-term on-the-job training
43-4041	Credit Authorizers, Checkers, and Clerks	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
45-1011	First-Line Supervisors of Farming, Fishing, and Forestry Workers	1	32	■	High school diploma or equivalent	Less than 5 years	None
45-4011	Forest and Conservation Workers	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
47-2231	Solar Photovoltaic Installers	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
49-2093	Electrical and Electronics Installers and Repairers, Transportation Equipment	1	32	■	Postsecondary nondegree award	None	Long-term on-the-job training
49-2097	Audiovisual Equipment Installers and Repairers	1	32	■	Postsecondary nondegree award	None	Short-term on-the-job training
49-3043	Rail Car Repairers	1	32	■	High school diploma or equivalent	None	Long-term on-the-job training
49-9063	Musical Instrument Repairers and Tuners	1	32	■	High school diploma or equivalent	None	Apprenticeship

49-9081	Wind Turbine Service Technicians	1	32	■	Postsecondary nondegree award	None	Long-term on-the-job training
49-9097	Signal and Track Switch Repairers	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-3023	Slaughterers and Meat Packers	1	32	■	No formal educational credential	None	Short-term on-the-job training
51-4021	Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-4034	Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-4111	Tool and Die Makers	1	32	■	Postsecondary nondegree award	None	Long-term on-the-job training
51-4122	Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-5113	Print Binding and Finishing Workers	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-8099	Plant and System Operators, All Other	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-9041	Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-9083	Ophthalmic Laboratory Technicians	1	32	■	High school diploma or equivalent	None	Moderate-term on-the-job training
51-9111	Packaging and Filling Machine Operators and Tenders	1	32		High school diploma or equivalent	None	Moderate-term on-the-job training
53-2011	Airline Pilots, Copilots, and Flight Engineers	1	32	■	Bachelor's degree	Less than 5 years	Moderate-term on-the-job training
53-7063	Machine Feeders and Offbearers	1	32	■	No formal educational credential	None	Short-term on-the-job training
Total shortfall jobs		**1,718**					
Count shortfall occups.		**202**					
Total Non-Reported MSA jobs		**657**					

Total Non-Reported MSA occups.	**131**	

Source: Bureau of Labor Statistics (2023)