

Fort Myers Sports Facility Economic Impact Analysis

For: Card & Associates
From: Points Consulting

Date : March 25th, 2026



Contents

Table of Figures & Tables	ii
1. Executive Summary	4
2. Facility & Report Overview	6
Proposed Facility Overview	6
Feasibility & Impact Study Overview	7
3. Demand Assessment	8
Industry Summary	8
Local Consumer Demand Summary	8
Site Characteristics	17
Fort Myers Market Area Industry Performance	27
4. Supply Assessment	30
Overall Scope of Services	30
Indoor Hardwood Sports	33
Diamond Sports	35
Field Sports	36
5. Economic Impact Analysis	40
Introduction	40
Annual EIA Results	40
Construction EIA Results	42
Tax Impact	44
Detailed Jobs Impact	45
Economic Impact Comparison	46
EIA Methodology Notes	47
Appendix A: Additional Data	49

Table of Figures & Tables

Figure 2.1: City of Palms Park Facility	6
Figure 2.2: The Facility Site	6
Table 3.1: Key National Trends for the Fitness Club & Sports Coaching Industries	8
Figure 3.1: Primary Market Area Map	10
Table 3.2: Primary Market Area Demographics	11
Table 3.3: Race & Ethnicity Comparison, 2025	12
Figure 3.2: Median Age by Region, 2025	12
Figure 3.3: Age Distribution by Region, 2025	13
Table 3.4: Gender Ratio by Region, 2025	13
Figure 3.4: Median Household Income by Region, 2025	14
Table 3.5: Financial Characteristics by Region, 2025	14
Table 3.6: Regional Comparison of Non-Labor Income, 2022	15
Table 3.7: Percentage of People Living in Poverty, 2024	15
Figure 3.5: Educational Attainment by Region, 2025	16
Table 3.8: Regional Housing Units per Capita, 2025	16
Figure 3.6: Annual Average Daily Traffic Map of Midtown Fort Myers Area	17
Table 3.9: Traffic Levels on Surrounding and Major Streets by Distance From Site	18
Figure 3.7: Tapestry LifeMode Distribution Across the Primary Market Area Relative to the Facility Location	19
Table 3.15: Tapestry Segmentation in the Primary Market Area & United States	20
Figure 3.8: Distribution of “Up and Coming Families” Households Across the Primary Market Area Relative to the Facility Location	21
Table 3.16: National Level Characteristics of the Primary Market Area Tapestry Segments	22
Table 3.10: Projected Demand for Athletic & Food Retail in the Primary Market Area	23
Table 3.11: Attendance at Sporting Events During the Last 12 Months	23
Table 3.12: Sports Market Potential	24
Table 3.13: Sports & Recreation Equipment Spending During the Last 12 Months	24
Figure 3.9: PMA Sports Participation Rates Compared to National Participation Rates, 2025	25
Table 3.14: PMA Sports Participation	25
Figure 3.10: National Overall Sport Participation, 2018–2023	26
Figure 3.11: National Core Sport Participation Growth, 2018–2023	27
Figure 3.12: Projected Earnings & Employment Growth, 2015–2034 in Lee County	28
Figure 3.13: City of Palms Park Site Industries Earnings & Employment Growth, Lee County	29
Table 3.17: Change in City of Palms Park Site Industries, Lee County	29
Figure 4.1: Map of Catalogued Facilities	30

Table 4.1: Peer Comparisons to Proposed Fort Myers Facility.....	31
Figure 4.2: Interior Batting Cages at American Sports Academy (Fort Myers, FL)	31
Figure 4.3: Aerial View of STARS Complex (Fort Myers, FL)	31
Figure 4.4: Indoor Courts at North Collier Regional Park (Naples, FL)	32
Table 4.2: Peer Local Indoor Hardwood Sports Facilities	34
Figure 4.5: Alico Arena Indoor Stadium Court (Fort Myers, FL)	34
Figure 4.6: Babcock Ranch Fieldhouse Indoor Court (Punta Gorda, FL)	34
Figure 4.7: Florida Conquer Volleyball Indoor Court (Fort Myers, FL)	34
Figure 4.8: IMG Academy Basketball Center (Bradenton, FL)	34
Table 4.3: Peer Local Diamond Sports Facilities	35
Figure 4.9: Englewood Sports Complex Little League Diamonds (Englewood, FL)	36
Figure 4.11: Lee County Player Development Complex (Fort Myers, FL)	36
Figure 4.10: Cape Coral Sports Complex (Cape Coral, FL)	36
Table 4.4: Peer Local Soccer & Football Field Facilities	37
Figure 4.12: Paradise Coast Sports Complex Outdoor Fields (Naples, FL)	38
Figure 4.13: Soccer Fields at North Collier Regional Park (Naples, FL)	38
Figure 4.14: Kelly Road Soccer Complex (Fort Myers, FL).....	38
Figure 4.14: Soccer Fields at Big Corkscrew Regional Park (Naples, FL)	39
Figure 4.16: Soccer Roots Indoor Facility	39
Figure 5.1: Economic Impact Analysis Definitions	40
Figure 5.2: Annual Economic Impact of the Fort Myers Facility to Lee County	41
Table 5.1: Average Annual Economic Impact.....	42
Table 5.2: Construction Impact.....	43
Table 5.3: Lee County and Florida Fiscal Impacts of Operations.....	44
Table 5.4: Fiscal Impact of Construction	45
Table 5.5: Lee County Total Jobs Impact by Industry Sector	45
Figure 5.3: The Facility’s Impact Compared to Other Industries in Lee County.....	46
Table A.1: Top Tapestry Segments	49

1. Executive Summary

Within this report, Points Consulting (PC) provides a comprehensive analysis of the feasibility and potential economic impact of a proposed athletic facility within the Fort Myers/Cape Coral Florida area (i.e., the Facility). The Facility would be developed by Card & Associates (C&A), which operates several similar facilities throughout the country. The intent of this report is to provide C&A and stakeholders in the Fort Myers area with information needed to determine whether the Facility would serve as an economic and community development asset for the Fort Myers area. The research and conclusions presented herein represent a professional, third-party feasibility assessment by PC.

Based on all research and analysis conducted for this study, PC concludes that the Fort Myers area would greatly benefit socioeconomically from the proposed Facility and would experience no notable drawbacks. Though certain facilities in the area provide access to sports amenities, the area is in need of additional facilities (particularly indoor ones) to allow for year-round use. Additionally, given the area's relatively high median income, older median age, and significant share of non-labor income, C&A may consider offering discounted senior access to activities aligned with older demographics, such as tennis, pickleball, and potentially golf simulators.

The Facility would serve as a nexus for a wide variety of sports activities. The C&A model represents an efficient use of real estate and increases community benefit compared to single- or dual-use sports facilities. The following points highlight the key benefits of the Facility:

- Within the Primary Market Area (PMA) are numerous peer facilities including 17 standard gym-type facilities, 19 facilities with indoor hard courts, 37 facilities with diamond sports facilities, and 10 facilities with turf fields.¹ Given our research on sports participation for the region this is not an adequate degree of facilities to meet demand for both local and travelling athletes.
- The annual economic impact of the Facility is projected to reach \$62.7 million once fully operational, exceeding the local impact of industries such as Marinas, and Travel Agencies, among others. The Facility could also deliver roughly \$2.0 million in annual taxes to Lee County, supporting services such as beaches, schools, and locally authorized projects.
- The PMA has a median household income that closely aligns with the U.S. average, indicating comparable resident spending capacity.

¹ The PMA roughly includes Lee and Charlotte Counties, along with the southwest portion of Collier and Hendry Counties, and the southeast portion of Sarasota and Desoto Counties. Precise boundaries of the PMA are defined on page five of this report.

- There are over 120,000 individuals in the 10- to 17-year-old age cohort (equivalent to approximately 8% of all residents).
- The Facility aligns with the 2024 Fort Myers Downtown Redevelopment Update by supporting placemaking and attracting public and private investment.²
- This location will produce an outsized economic impact owing to the fact that Lee County is already a strong tourism-based economy, and for this reason the Facility will attract an above average proportion of out of region visitors.
- Approximately 3% of PMA households participate in sports such as tennis, soccer, and basketball that the Facility is expected to support.
- While Fort Myers trends slightly older with comparatively lower household incomes, the Facility is expected to draw visitors from a broader regional market rather than relying solely on the local population.

² Stantec, *Fort Myers Downtown Redevelopment Area Plan Update* (Fort Myers: Fort Myers Community Redevelopment Agency, 2024), <https://www.fortmyers.gov/DocumentCenter/View/25304/Fort-Myers-Downtown-Redevelopment-Area-Plan-Update-2024-PDF?bidId=>

2. Facility & Report Overview

Proposed Facility Overview

The Facility will be located at the site of the existing City of Palms Park baseball field, which will be demolished to accommodate the new multi-use sports complex. The Facility will feature the following amenities:

- Between 150,000 and 200,000 square-feet (SF) of indoor space, including:
 - 7 basketball converted to 14 volleyball hardwood courts
 - An arena court with 1,500 seats
 - ±60,000 square feet of free span turf
 - Hitting/pitching tunnels

Figure 2.1: City of Palms Park Facility



Source: WGCU News, October 13th, 2021

Figure 2.2: The Facility Site



Source: Card & Associates

The exact combination of features and amenities is not finalized, but our working assumptions are based on the Site Plan provided by C&A.

Feasibility & Impact Study Overview

Points Consulting (PC) is a management consulting firm based in Idaho that specializes in economic development and real estate–related issues, including feasibility and housing studies. PC’s experienced team has completed more than 30 economic impact and feasibility studies over the past 10 years across a range of economic and community development topics. This study provides a third-party perspective on the feasibility of the Facility, evaluating its ability to meet the unique demands of the local community while achieving financial sustainability as an independent business. In addition, PC estimates the economic impact the Facility would have on the Lee County area and the state of Florida.

The analysis considers supply and demand dynamics, with an emphasis on both general socioeconomic indicators and factors specific to athletic facilities. The report also presents a comprehensive assessment of household interest levels and willingness to pay within the PMA, while accounting for existing facilities with which the Facility may compete.

3. Demand Assessment

This demand assessment seeks to determine the degree to which residents in Fort Myers and the surrounding market area need and/or desire services offered at the Facility. PC specifically examined economic trends in the local area, local sports participation trends, customers' spending and recreational habits, and the attractiveness of Fort Myers as a multi-sport facility development site.

Industry Summary

Whether via federal statistical agencies or industry associations, national-level industry research is often conducted at a level of detail determined by North American Industry Classification System (NAICS) classifications. The industries that most closely approximate the activities KCAF performs include Gym, Health & Fitness Clubs (NAICS 71394), and Sports Coaching (NAICS 61162). Please note, however, that the activities of businesses cataloged under these NAICS codes are considerably broader than those to be conducted at the Facility. Because of this, all metrics should be interpreted as inferences rather than precise indicators.

Table 3.1: Key National Trends for the Fitness Club & Sports Coaching Industries

Factor	Health & Fitness Clubs	Sports Coaching
Annual Revenue Growth Rate ('20-'25)	40.8%	17.6%
National Annual Revenue (2025)	\$46.4B	\$15.4B
Wages as % of Revenue 2025	32.0%	34.6%
Profit Margin (2023)	77.0%	86.0%
Life Cycle Stage	Mature	Mature
Barriers to Entry	Low	Steady
Competition Level	High	Steady

Source: Points Consulting; IBISWorld Industry Reports: "Gym, Health & Fitness Clubs in the U.S." (71394) and "Sports Coaching in the U.S." (61162).

Local Consumer Demand Summary

PC identified two primary sources of demand for the Facility, each with unique customer profiles. The first group consists of frequent local users who will use the Facility for regular league play, practices, and pick-up games. A secondary group of non-regular users will attend the Facility for games and tournaments, typically visiting only once or several times per year. We address the out-of-region visitor audience in greater detail in [Chapter 5: Economic Impact Analysis](#).

Each component of demand has different features and benefits. Local demand is generally more stable and predictable. Non-regular users, however, tend to spend more during their visits and therefore deliver a larger economic impact to the region.

Industry Highlights: Gyms, Health & Fitness Clubs

The Gyms, Health & Fitness Clubs industry in the U.S. has experienced moderate annual revenue growth in recent years (40.8%), likely reflecting increased health consciousness among consumers. Membership fees are the largest source of revenue for the industry (7.0%), followed by personal training (13.1%). Guest admissions and merchandise sales represent smaller shares of revenue and are tied as the next largest sources (2.3% each). As of 2023, the industry's profit margin is competitive with other service-based industries at 77.0%. Nationally, industry sales and profits are distributed across more than 100,000 establishments.

Industry Highlights: Sports Coaching

Sports Coaching represents a \$15.4 billion industry in 2025 and experienced a 17.6% annual revenue growth rate between 2020 and 2025. This indicates a strong post-pandemic expansion in organized and instructional sports activities. Wages account for 34.6% of industry revenue. This is slightly higher than in the Gyms, Health & Fitness Clubs industry and reflects the labor-intensive nature of coaching services that rely heavily on instructors and trainers. Despite this reliance on labor, the industry maintains a high profit margin of approximately 86.0%. This suggests relatively low operating costs beyond labor. The industry is considered to be in the mature stage of its life cycle, with stable barriers to entry and competition levels, indicating a stable but competitive market environment for new and existing providers of sports instruction.

Defining the Primary Market Area (PMA)

It is important to understand market dynamics for the area surrounding the sports facility because research indicates that convenience and travel distance are very important factors for regular visitors to sports and fitness centers. One study finds that individuals who live farther from sports or physical activity facilities are more likely to report lower exercise frequency. This indicates that participation declines as travel distance increases.³ Though much of this research focuses on standard membership-driven gyms, the patterns are likely similar for users of multi-use facilities. Some local users will likely be drawn from each of the six counties that make up the Primary Market Area (PMA). Identifying the PMA, however, involves additional considerations such as the availability of substitute facilities, traffic congestion during peak use times, and the likelihood that residents will attend on a regular basis.⁴

³ Auriba Raza et al., "Distance to sports facilities and low frequency of exercise and obesity: a cross-sectional study," BMC Public Health 22 (2022): 2036, https://www.researchgate.net/publication/365190846_Distance_to_sports_facilities_and_low_frequency_of_exercise_and_obesity_a_cross-sectional_study.

⁴ Please note, PC's analysis of other nearby facilities is covered later in this analysis in [Chapter 4: Supply Assessment](#).

Based on market, access and population factors, PC focused on the area shown in Figure 3.1 as the Facility's PMA to estimate the most likely visitor outcomes. This radius is warranted because, while several similar facilities exist, many have limited space, are not mixed-use, or are restricted to outdoor operations.

More detailed information about these other facilities is discussed in the [Unique Features of the Facility](#) section of Chapter 4.

The PMA encompasses the following counties, with some included only in part:

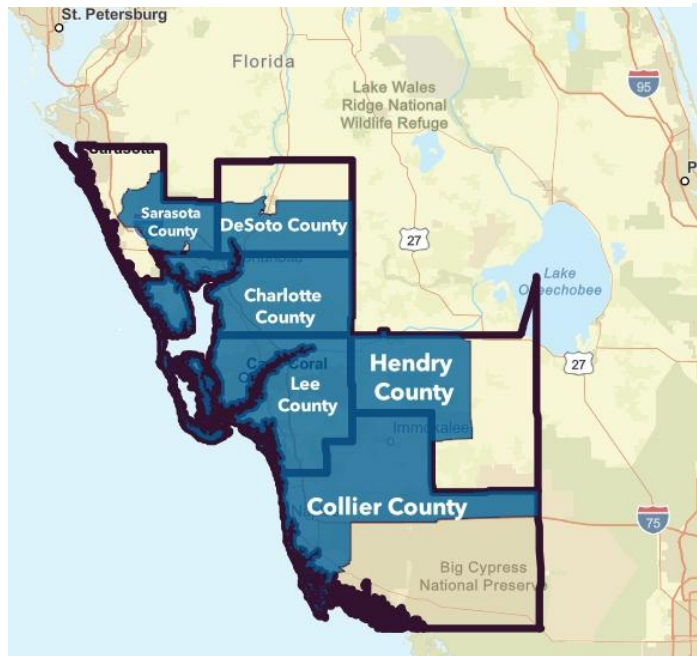
- Charlotte County
- Collier County
- DeSoto County
- Hendry County
- Lee County
- Sarasota County

Using this PMA as the basis, we present current and forecasted demographics in Table 3.2.

As of 2025, the PMA population is approximately 1,600,000 residents. The population is projected to reach approximately 1,700,000 by 2030, showing continued growth across the region (Table 3.2). Similarly, the number of households is expected to increase from approximately 680,000 to nearly 750,000 over the same period, reflecting ongoing residential expansion throughout the market.

Children between the ages of 10 and 17 account for roughly 7.6% of the PMA population in 2025 and are projected to decline slightly to about 7.2% by 2030. This modest decrease is likely influenced by Southwest Florida's demographic profile, as the region has long been a popular destination for retirees. However, this trend does not necessarily indicate limited demand for youth recreation. Local stakeholders in the Fort Myers area have expressed concern that relatively few recreational opportunities exist for younger residents. This suggests that new sports and recreation amenities could help address an existing gap in youth programming.⁵

Figure 3.1: Primary Market Area Map



Source: ESRI Business Analyst, 2026

⁵ Gracie Fusco, "City of Palms Park redevelopment study approved by Fort Myers council," WINK, February 2, 2026, https://www.winknews.com/news/lee/city-of-palms-park-redevelopment-study-approved-by-fort-myers-council/article_78c1fe0b-a813-410d-b766-cc49b4ceda64.html.

In addition to local use, the Facility could also draw visitors traveling for sports tournaments and sports tourism. The 2025 Annual Visitor Profile Summary Report for Lee County found that 10% of visitors to the Fort Myers area attended a sporting event while visiting. With 3.3 million total annual visitors, this suggests that sports tourism draws more than 300,000 visitors per year.⁶

As of 2025, median household income in the PMA is approximately \$80,000 and is projected to increase to roughly \$94,000 by 2030. Average household income is also expected to rise from about \$120,000 to approximately \$134,000 over the same period. Despite the area’s older demographic profile, household income levels remain relatively strong. Income levels are projected to grow and support discretionary spending on sports participation, memberships, tournaments, and related activities.

Table 3.2: Primary Market Area Demographics

Summary	2025	2030
Population	1.6M	1.7M
Population Ages 10–17	119,579	113,577
% Ages 10–17	7.6%	7.2%
Households	681,199	747,278
Average Household Size	2.28	2.25
Median Age	51.9	52.2
Median Household Income	\$80,513	\$94,315
Average Household Income	\$120,007	\$134,389

Source: ESRI Business Analyst, 2026

Comparative Demographics

Demographics play a central role in shaping regional demand for goods and services. Factors such as age, household composition, educational attainment, and poverty levels often all directly influence the types and number of products and services needed. Different population cohorts require and desire different amenities depending on their life stage and financial outlook. From an economic standpoint, these demographic indicators help identify who is most likely to use the space, how often, and for what purposes.

While race and ethnicity may not be as prominent as other demographic identifiers, they can still meaningfully influence park and recreational demand, particularly in terms of recreational preferences. The City of Fort Myers and the PMA are

⁶ Lee County Visitor & Convention Bureau, *Annual Visitor Profile Summary Report 2025* (Fort Myers, FL, 2025), <https://www.visitfortmyers.com/sites/default/files/2026-03/2025%20Visitor%20Tracking%20Report.pdf>.

predominantly composed of residents who identify as White alone, followed by those who identify as Hispanic (Table 3.3).

Table 3.3: Race & Ethnicity Comparison, 2025

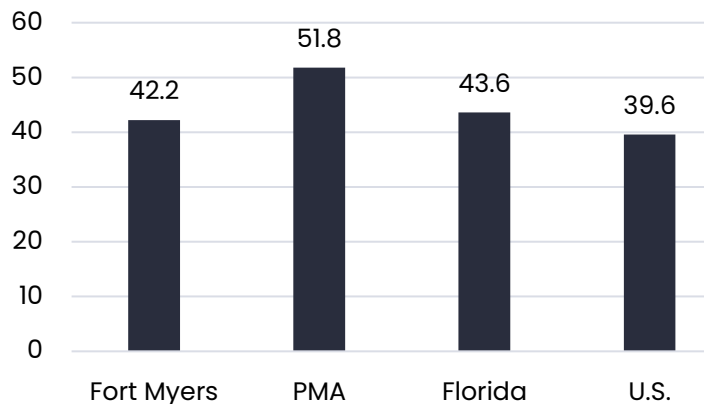
Race/Ethnicity	Fort Myers	PMA	Florida	U.S.
White Alone	52.4%	69.9%	56.3%	60.0%
Black Alone	20.8%	6.9%	14.9%	12.5%
American Indian Alone	0.8%	0.5%	0.5%	1.1%
Asian Alone	2.7%	1.8%	3.3%	6.4%
Pacific Islander Alone	0.0%	0.0%	0.1%	0.2%
Some Other Race Alone	10.4%	7.6%	7.6%	8.8%
Two or More Races	12.8%	13.3%	17.4%	10.8%
Hispanic Origin	25.4%	23.7%	27.7%	19.7%

Source: ESRI Business Analyst, 2026

As shown in Figure 3.2, the PMA has a median age of approximately 52. This is nearly 10 years higher than both Fort Myers and the State of Florida. Compared to the United States overall, the PMA’s median age is roughly 12 years greater.

As previously noted, the PMA encompasses Lee, Collier, and Charlotte Counties, as well as portions of DeSoto, Sarasota and Hendry Counties in Southwest Florida. The region is consistently recognized as a prominent retirement destination and attracts significant in-migration of older adults. This likely explains the area’s elevated median age.⁷

Figure 3.2: Median Age by Region, 2025



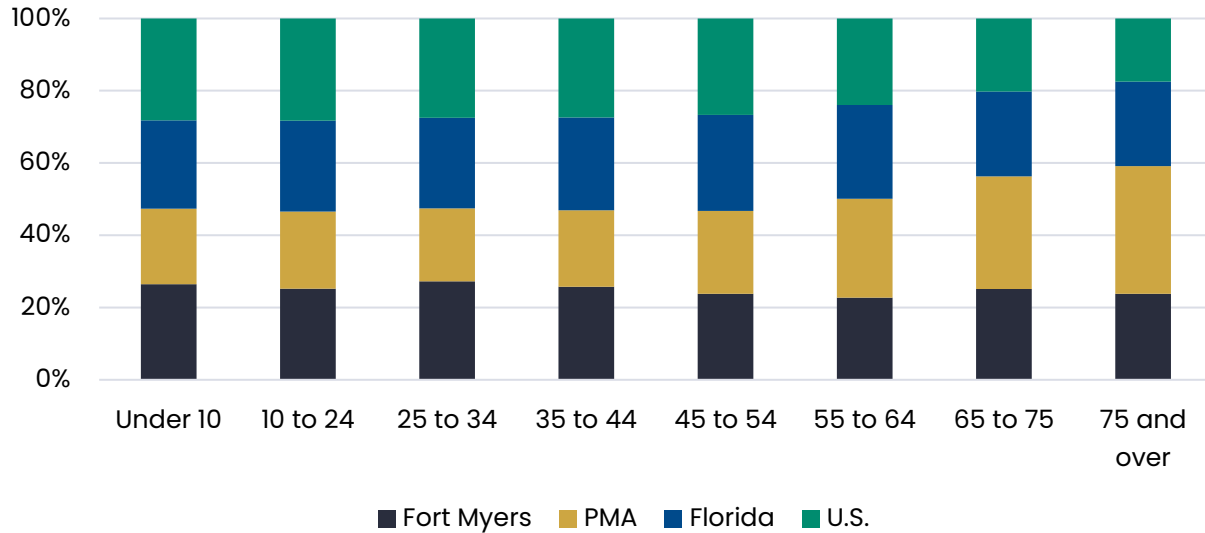
Source: ESRI Business Analyst, 2026

Residents ages 10–24 represent the largest age cohort across all four regions, accounting for approximately 17.1% of Fort Myers’ population and 14.5% of the PMA (Figure 3.3). Although the PMA skews older, with slightly more than 32% of residents aged 65 and over, there remains a substantial base of youth and young adults. This age distribution supports demand for both youth-oriented athletic programming and

⁷Adam Regan, “Southwest Florida leads as US primetime retirement hub,” *Gulfshore Business*, “January 5, 2026, https://www.gulfshorebusiness.com/gb-daily/southwest-florida-leads-as-a-top-retirement-location/article_a7c53c53-2b5a-4ddb-bb0d-e270bd4df2ab.html.

recreational opportunities for older adults and positions the proposed facility to serve a broad, multi-generational market.

Figure 3.3: Age Distribution by Region, 2025



Source: ESRI Business Analyst, 2026

As shown in Table 3.4, the population across all regions is nearly evenly split between male and female residents. This balanced demographic profile broadens the total addressable market for athletic programming and supports facility planning that accommodates boys’ and girls’ sports, co-ed leagues, and adult recreational activities. The absence of a gender imbalance suggests there are no structural demographic constraints on participation demand.

Table 3.4: Gender Ratio by Region, 2025

Region	Male	Female
Fort Myers	49.7%	50.3%
PMA	49.4%	50.6%
Florida	49.2%	50.8%
U.S.	49.7%	50.3%

Source: ESRI Business Analyst, 2026

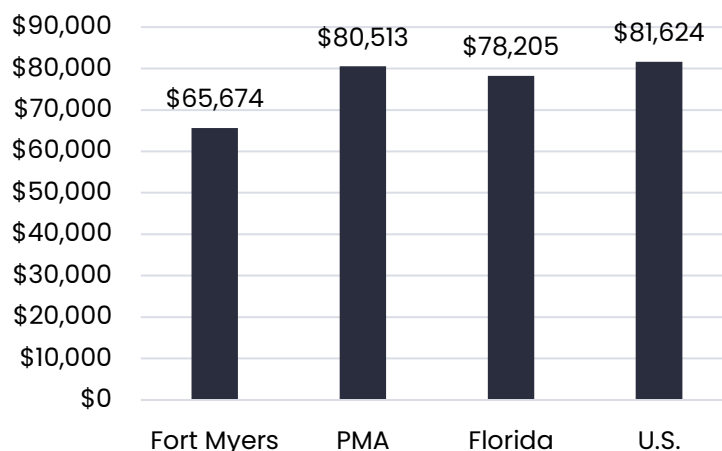
As shown in Figure 3.4, the PMA’s median household income is approximately \$80,000. This closely aligns with the national median of \$82,000 and exceeds the statewide median. While the City of Fort Myers reports a lower median household income

(\$65,674) than the other regions, household incomes across the broader market remain strong. This income profile supports discretionary spending on youth sports participation, league fees, tournaments, and other recreational activities.

In Table 3.5, the PMA reports the highest income per capita and median household net worth among

the comparison regions (\$51,705 and \$368,045, respectively), indicating a financially strong market capable of supporting discretionary spending on recreational programming and tournament participation. Although Fort Myers reports the lowest income per capita among the regions, it remains near the national average. This suggests a stable earnings base. Its median household net worth similarly reflects sufficient financial capacity to support participation in organized athletics and related activities.

Figure 3.4: Median Household Income by Region, 2025



Source: ESRI Business Analyst, 2026

Table 3.5: Financial Characteristics by Region, 2025

Region	Income per Capita	Median Net Worth of Households
Fort Myers	\$44,700	\$101,231
PMA	\$51,705	\$368,045
Florida	\$44,891	\$253,219
U.S.	\$45,360	\$228,144

Source: ESRI Business Analyst, 2026

Table 3.6 compares the share of total personal income derived from non-labor sources across the counties that comprise the PMA. Non-labor income includes earnings from investments, property, and transfer payments (such as Social Security benefits) rather than wages and salaries from employment.

In each county, non-labor income accounts for more than 40% of total personal income. Consistent with previous demographic indicators, this elevated share reflects the region’s retirement-oriented population. Importantly, a higher non-labor income ratio does not necessarily indicate economic weakness. Rather in this context, it reflects the prominence of retirement and capital-based income streams within the regional economy. However, the composition of non-labor income is important for demand

analysis. While retirement and investment income may signal financial stability, transfer payments associated with income-support programs can indicate more limited household purchasing capacity. Accordingly, poverty levels and income distribution remain important considerations when evaluating potential participation and spending for the proposed Facility.

Table 3.6: Regional Comparison of Non-Labor Income, 2022

	Lee Co.	Charlotte Co.	Hendry Co.	Collier Co.
Ratio of Non-Labor Income	59.6%	63.4%	40.9%	69.3%

Bureau of Economic Analysis, 2026

Table 3.7 compares the percentage of residents living below the federal poverty level across the counties that comprise the PMA. When considered alongside Table 3.6, a clear pattern emerges: counties with higher shares of non-labor income tend to report lower poverty rates. Lee, Charlotte, and Collier counties (each with non-labor income shares above 59%) report poverty rates ranging from 9.0% to 12.0%. In contrast, Hendry County, with the lowest non-labor income share (41.7%), reports the highest poverty rate at 22.5%.

This distinction is important for demand considerations. Household purchasing capacity is not uniform across the PMA. Proximity to the proposed facility will also influence participation patterns, since households located closer to the site may face lower transportation and time costs compared with more distant communities.

Table 3.7: Percentage of People Living in Poverty, 2024

	Lee Co.	Charlotte Co.	Hendry Co.	Collier Co.
% in Poverty	12.0%	9.0%	22.5%	10.7%

Source: U.S. Census Bureau ACS 5-Year Estimates, B17001

Education

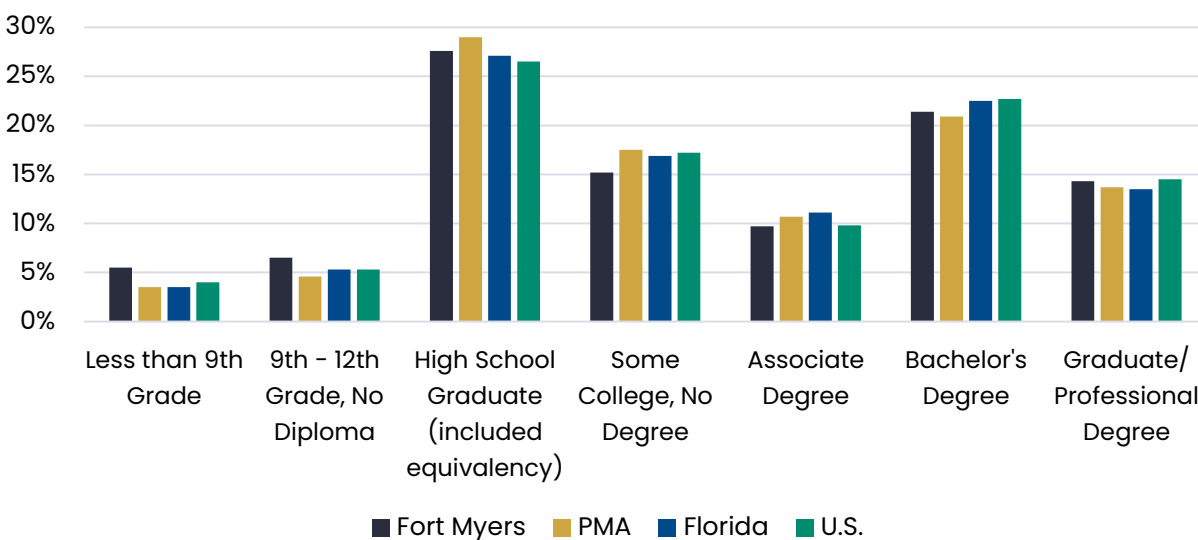
Educational attainment is a key demographic indicator due to its strong connection to positive economic outcomes. Research shows that education significantly increases labor productivity, contributing an estimated 13–30% of total productivity growth. In essence, investments in education (human capital) are comparable to investments in financial capital or equipment in their ability to enhance economic growth and resiliency.⁸ Additionally, full-time workers with upper secondary degrees (below a bachelor’s) earn approximately 18% more than those without such qualifications. This

⁸Gary S. Becker, *Human Capital: A Theoretical and Empirical Analysis with Special Reference to Education* (University of Chicago Press, 1994).

suggests that more educated households are likely to have greater discretionary spending power.⁹

As shown in Figure 3.5, high school graduates constitute the largest educational attainment group across all regions, with Fort Myers and the PMA reporting the highest shares at 27.6% and 29.0%, respectively. While Florida and the United States have slightly higher proportions of residents holding a bachelor’s degree (approximately 23%), Fort Myers and the PMA show comparatively higher concentrations of individuals with graduate or professional degrees.

Figure 3.5: Educational Attainment by Region, 2025



Source: ESRI Business Analyst, 2026

Housing

Table 3.8 compares housing units per capita across the study regions. This measure reflects the number of housing units relative to the total population in a given area. Higher ratios typically indicate smaller household sizes, seasonal or second-home properties, and the presence of retirement communities. Conversely, lower ratios may suggest larger households or tighter housing supply.

The PMA reports a housing units per capita value of 0.53, exceeding the national benchmark of 0.43.

This higher ratio aligns with the PMA’s elevated median age and indicates a greater

Table 3.8: Regional Housing Units per Capita, 2025

Region	Housing Units per Capita
Fort Myers	0.53
PMA	0.56
Florida	0.46
U.S.	0.43

Source: ESRI Business Analyst, 2026

⁹ OECD, *Education at a Glance 2024: OECD Indicators*, OECD Publishing, Paris, September 10, 2024, <https://doi.org/10.1787/c00cad36-en>.

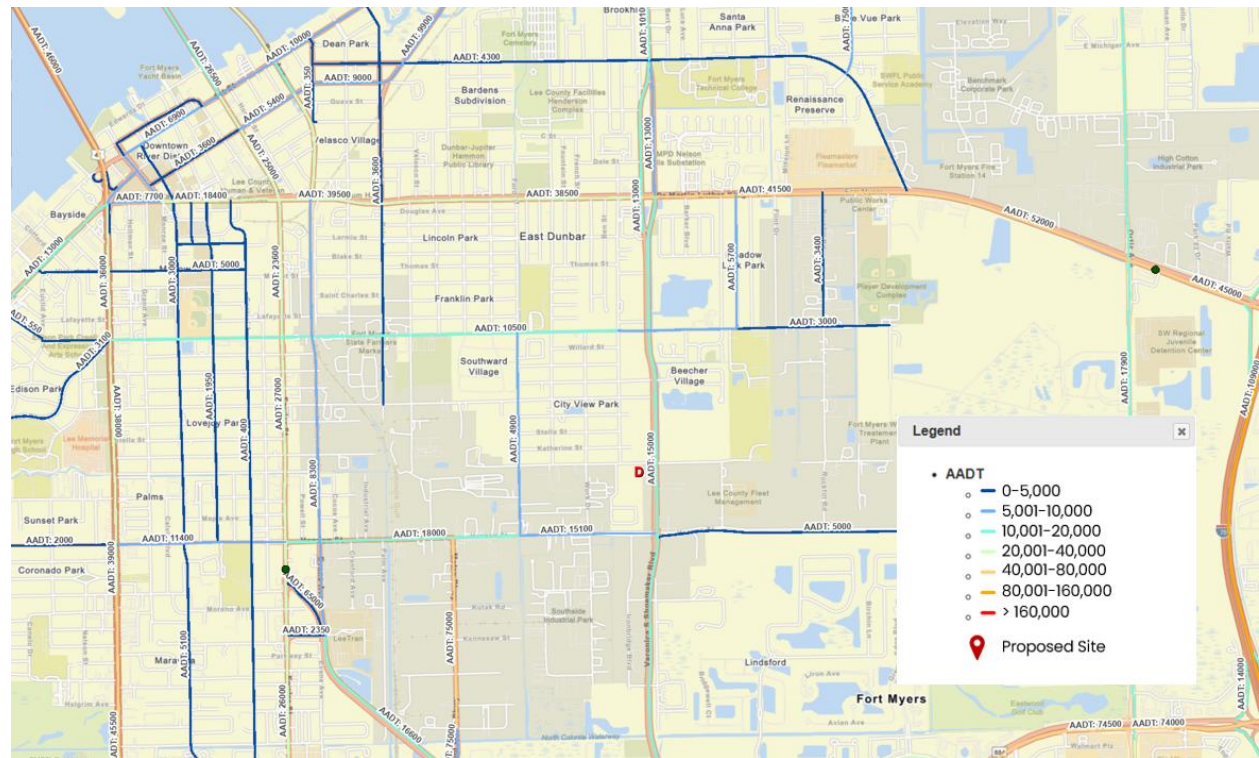
prevalence of smaller, retirement-oriented households. Notably, the presence of seasonal and second-home properties may support sports tourism by expanding short-term accommodation availability for tournament participants and visitors.

Site Characteristics

One important factor in any commercial development is the level of traffic in areas surrounding the site. As a general rule of thumb, commercial developers look for locations with average daily traffic counts (ADTs) of 5,000 or greater. This threshold, however, can vary depending on site visibility, naturally generated traffic, and other factors.

At this stage, the development site is expected to be located at 2201 Edison Ave, Fort Myers, Florida, in the Midtown area of Fort Myers near SR 82 and U.S. 41. The site is also less than 5 miles west of Interstate 75. Figure 3.6 shows AADTs for major roads and streets surrounding the proposed facility site.

Figure 3.6: Annual Average Daily Traffic Map of Midtown Fort Myers Area



Source: Florida Department of Transportation, Traffic Online, 2024

Traffic is strongest along U.S. 41, ranging from AADT of 36,000 to 46,000 which runs only two blocks from the proposed site. Also of note, the proposed site is less than five miles from Interstate 75 which has AADT of over 100K. Directly adjacent to the proposed site on the south, Edison Ave reports AADTs of 10,100. The other adjacent streets are not as heavily trafficked but still record AADTs of over 2,800. These patterns suggest that traffic

in the area exceeds the 5,000-ADT threshold. Table 3.9 displays the traffic levels on the nearby and major streets in the area for better readability.

Table 3.9: Traffic Levels on Surrounding and Major Streets by Distance From Site

Street	AADT	Closest Cross Street	Distance From Site
Broadway Ave	3,000	Victoria Ave	0.05 mi
Victoria Ave	5,000	Jackson St	0.15 mi
Jackson St	1,950	Dora St	0.33 mi
Fowler St	27,000	South St	0.34 mi
Cleveland Blvd (US 41)	36,000	Victoria Ave	0.35 mi
Dr. Martin Luther King Jr Blvd	18,400	Jackson St	0.39 mi
Fowler St	23,600	Market St	0.39 mi
Dr. Martin Luther King Jr Blvd	7,700	Cottage St	0.44 mi
Cleveland Blvd (US 41)	38,000	South St	0.48 mi
Central Ave	400	Stella St	0.52 mi
Dr. Martin Luther King Jr Blvd	34,000	Fowler St	0.53 mi
Evans Ave	8,300	Canal St	0.67 mi
Hanson St	18,000	Old Metro Pkwy	1.13 mi
Edison Ave	10,500	Ford St	1.15 mi
Cleveland Blvd (US 41)	46,000	Dr. Martin Luther King Jr Blvd	1.40 mi
I-75	109,000	Dr. Martin Luther King Jr Blvd	3.93 mi

Source: Points Consulting using Florida Department of Transportation, Traffic Online, 2024

PC conducted a brief review of city and county planning documents to determine how the proposed facility would either complement or conflict with community plans and goals. The Lee Plan appears consistent with encouraging increased tourism opportunities in Lee County, particularly sports tourism.¹⁰ The Midtown Vision Plan outlines the need for redevelopment in the Midtown area, particularly the potential for City of Palms Park to be redeveloped into a mixed-use town center.¹¹

Tapestry Segmentation

One of PC’s data vendors, Esri, provides a “Tapestry Segmentation” analysis that classifies market areas into 67 unique psychographic segments based on variations in values and behaviors. Individuals and households in the PMA naturally exhibit diverse interests, income levels, educational attainment, and professional backgrounds. The purpose of segmentation is to group the population into clusters with generally similar lifestyle choices, spending habits, and leisure activities. While the Tapestry segment titles serve as shorthand for common traits, PC supplements this information with

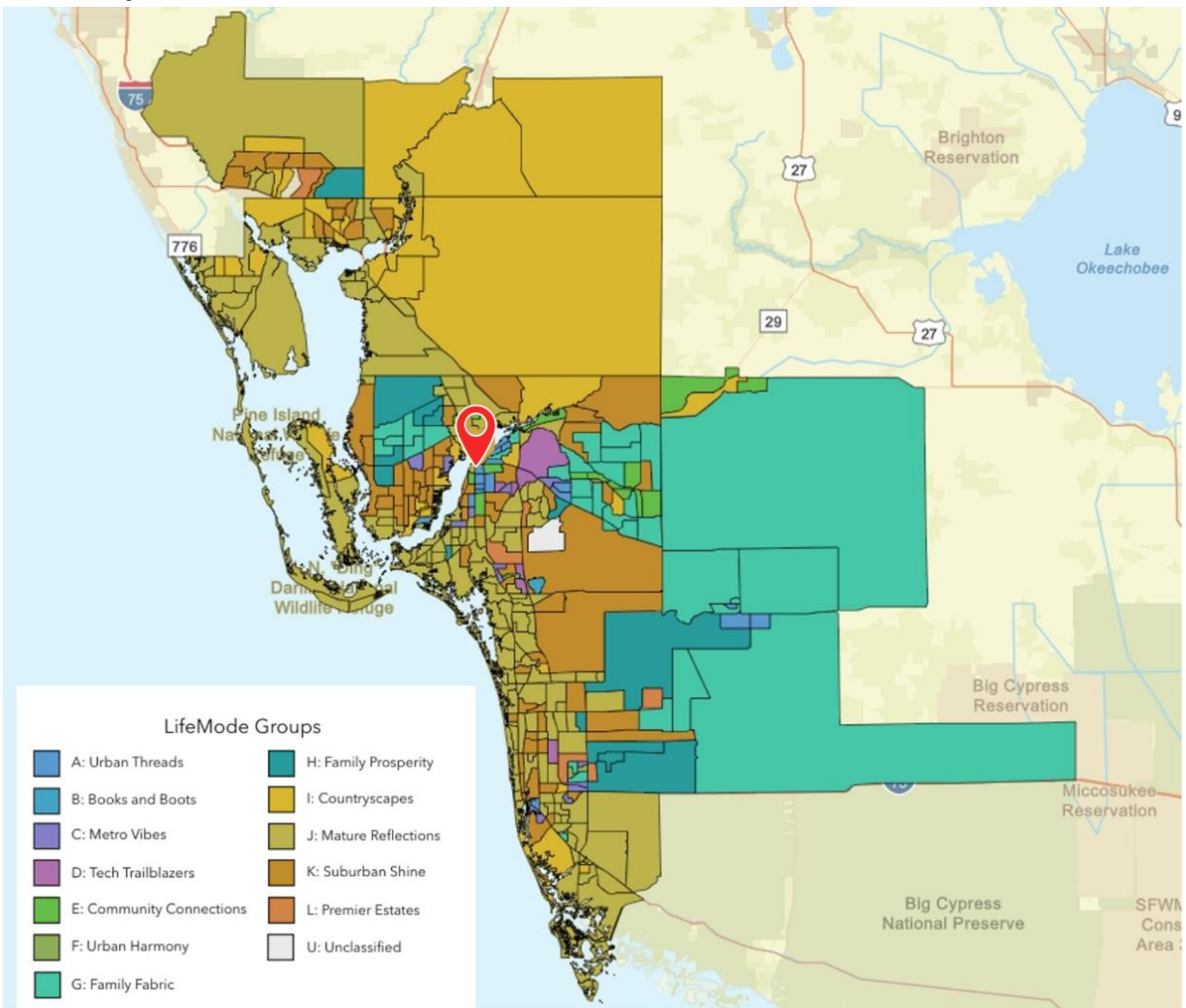
¹⁰ Lee County Southwest Florida, *The Lee Plan* (2025), <https://www.leegov.com/dcd/Documents/Planning/LeePlan/LeePlan.pdf>.

¹¹ City of Fort Myers, Florida, *Midtown Vision Plan*, (2018), <https://fortmyers.gov/DocumentCenter/View/12943/Midtown-Vision-Plan-PDF?bidId=>.

detailed demographic profiles for each highlighted segment to provide additional context.

The PMA in this analysis is characterized by an older senior population with upper-middle incomes, along with a mix of younger working- and middle-class residents with children. Similarly, Tapestry segments are grouped into broader categories called LifeModes. Figure 3.7 displays a map of the PMA, with LifeModes indicated by neighborhood.

Figure 3.7: Tapestry LifeMode Distribution Across the Primary Market Area Relative to the Facility Location



Source: ESRI Business Analyst, 2026

The PMA has a diverse mix of LifeModes, with the most common being “Silver and Gold,” “The Elders,” “Rural Resort Dwellers,” “Burbs and Beyond,” and “Up and Coming Families.” The “Up and Coming Families” segment primarily consists of large, young families in a variety of household structures. Married couples, both with and without children, make

up about half of these households, along with significant shares of single-parent households, cohabiting couples with children, and multigenerational families. The individual Tapestry segments most likely to utilize the sports facilities in Fort Myers are discussed in detail in Table 3.10 and [Appendix A](#).

PC highlights five specific Tapestry segments in the PMA as potential regular users of the sports facilities. As shown in Table 3.10, the PMA features a range of segments that are primarily concentrated among older and senior populations (45.7%), with a smaller share of younger working families (5.8%).

“Silver and Gold” is the largest Tapestry segment in the PMA, representing 19.2% of households. This is more than four times the national share of 4.5%. “The Elders” ranks second at 11.9%, compared to just 3.9% nationally. Collectively, the top five segments account for 51.4% of PMA households, indicating a high level of market concentration relative to the national distribution (18.1%).

While the PMA is predominantly retirement-oriented, the “Up and Coming Families” segment represents a key target market for the Facility. This group, which accounts for 5.8% of PMA households, consists of younger, active families that are more likely to participate in and regularly utilize organized sports and recreational amenities. As such, we expect this segment to serve as a core user base for the Facility and to support long-term demand for youth- and family-oriented programming.

Table 3.10: Tapestry Segmentation in the Primary Market Area & United States

Rank	Tapestry Segment	PMA		United States	
		% of Households	Cumulative % of Households	% of Households	Cumulative % of Households
1	Silver and Gold (J4)	19.2%	19.2%	4.5%	4.5%
2	The Elders (J2)	11.9%	31.2%	3.9%	8.5%
3	Rural Resort Dwellers (I5)	7.6%	38.7%	3.6%	12.1%
4	Burbs and Beyond (K8)	7.0%	45.7%	3.0%	15.2%
5	Up and Coming Families (G2)	5.8%	51.4%	3.0%	18.1%

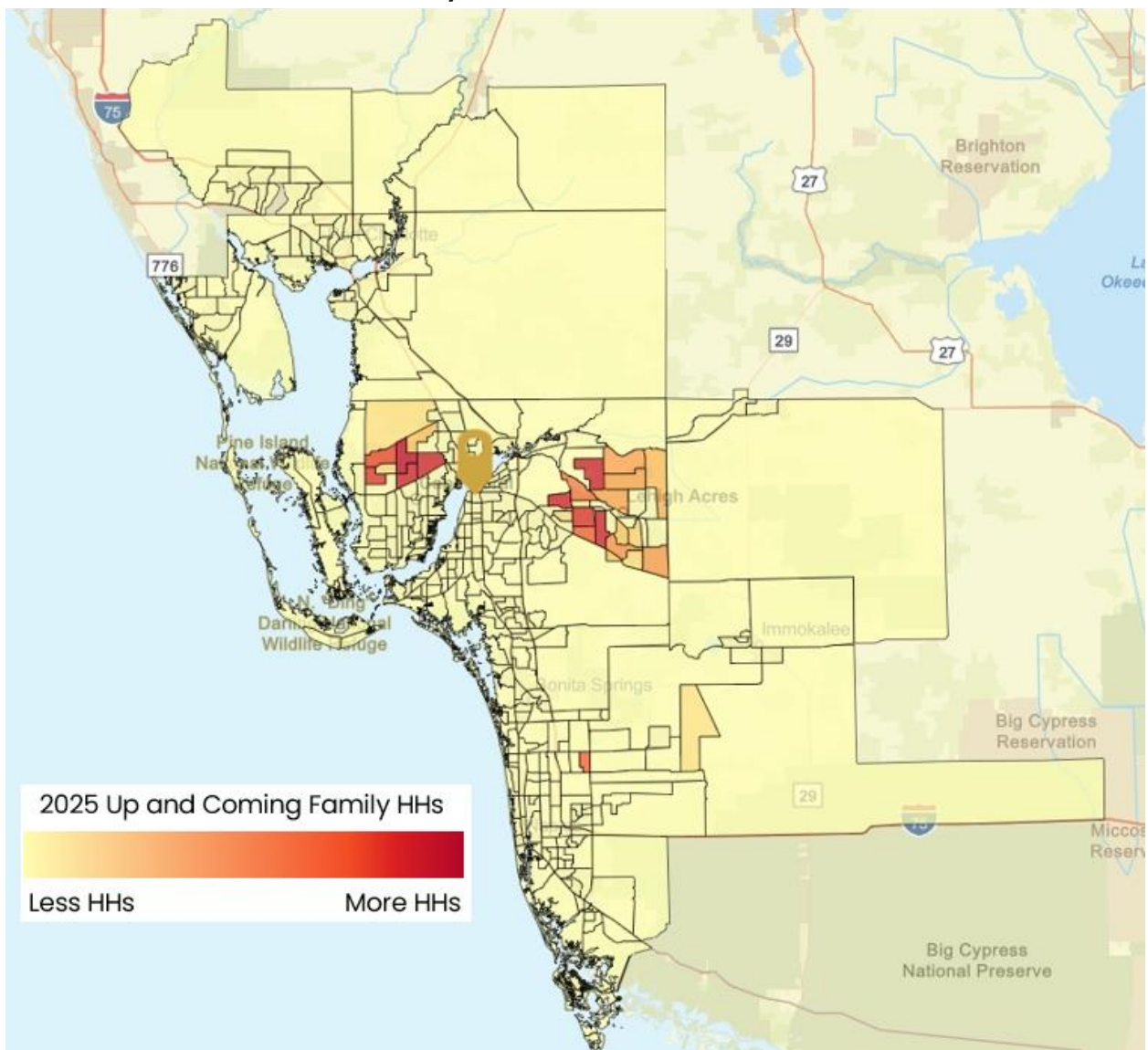
Source: ESRI Business Analyst, 2026

Figure 3.8 presents a heat map of households classified within the “Up and Coming Families” Tapestry segment across the PMA. As shown, concentrations of these households are clustered in and around the Fort Myers area, including locations in close proximity to the proposed Facility site.

This spatial distribution is a positive indicator for the Facility, as it suggests that a key target market (young, family-oriented households) is located within a convenient travel distance and is more likely to participate in organized sports and recreational activities, particularly those involving youth and family programming.

The presence of this segment near the Facility supports the potential for consistent local usage and reinforces its accessibility to its core user base. As a result, the geographic alignment between the Facility location and concentrations of “Up and Coming Families” strengthens the overall demand outlook and long-term viability of the project.

Figure 3.8: Distribution of “Up and Coming Families” Households Across the Primary Market Area Relative to the Facility Location



Source: Esri Business Analyst, 2026

Table 3.11 provides more details on the characteristics of the five market segments, including selected data on income, and average household size. These five segments account for 51.4% of households in the PMA compared to 18.1% nationally, indicating a significantly higher concentration of these socioeconomic profiles within the PMA.

For example, households in the “Up and Coming Families” segment report a median income of \$89,000 and an average household size of 3.02 persons, reflecting younger, family-oriented households. In comparison, “Silver and Gold” households report a higher median income of approximately \$102,000. Despite significant differences in median age, both segments reflect relatively strong income levels across older and younger households within the PMA. Additionally, “Burbs and Beyond” households average 2.39 persons per household, compared to 3.02 among “Up and Coming Families.” This indicates a meaningful presence of larger, family-oriented households.

Collectively, these segments suggest that the PMA includes a substantial share of higher-income households, including both affluent retirees and working families with children, particularly those within the “Up and Coming Families” segment. This demographic composition suggests the presence of disposable income and household structures consistent with participation in organized and travel-based sports activities.

Table 3.11: National Level Characteristics of the Primary Market Area Tapestry Segments

Rank	Tapestry Segment	Median Household Income	Median Age	Avg. HH Size
1	Silver and Gold (J4)	\$102,652	64.4	2.01
2	The Elders (J2)	\$69,169	74.1	1.67
3	Rural Resort Dwellers (I5)	\$71,031	55.1	2.2
4	Burbs and Beyond (K8)	\$119,769	51.1	2.39
5	Up and Coming Families (G2)	\$89,093	33.6	3.02

Source: ESRI Business Analyst, 2026

Sports Participation in the Primary Market Area

Table 3.12 presents projected demand for sports-related expenditures, including participation fees (e.g., club sports), event admissions, food purchased away from home and related equipment purchases in the PMA. Demand for athletic events is expected to increase over the next five years, with sports equipment expenditures projected to grow concurrently. Additionally, spending in the Food Away from Home category is projected to increase. This suggests that visitors and participants may generate additional demand for concessions and nearby dining options when attending events or youth sports camps at the Facility.

Table 3.12: Projected Demand for Athletic & Food Retail in the Primary Market Area

Category	2025	2030	Projected Growth
Fees for Participant Sports, excl. Trips	\$124.9M	\$153.4M	\$28.5M
Admission to Sporting Events, excl. Trips	\$64.2M	\$78.9M	\$14.7M
Sports/Recreation/Exercise Equipment	\$182.3M	\$224.1M	\$41.8M
Membership Fees for Clubs	\$224.4M	\$275.6M	\$51.2M
Fees for Recreational Lessons	\$110.2M	\$135.6M	\$25.3M
Food Away from Home	\$2,814.0M	\$3,459.1M	\$645.1M

Source: ESRI Business Analyst, 2026

Table 3.13 summarizes sports attendance and viewership metrics over the past 12 months. The Market Potential Index (MPI) measures the likelihood that households in a given area will exhibit certain behaviors or spending patterns. The United States serves as the benchmark, with an MPI of 100 for each category. For example, the PMA’s MPI of 105 for watching sports on TV or online indicates that households in the PMA are 1.05 times as likely as the average U.S. household to watch sports through these channels. Spectator engagement is an important consideration when evaluating the viability of sports facilities. Attendees contribute to revenue through admissions, concessions, and related spending.

Over the past year, 4.3% of the PMA population attended a high school sporting event, consistent with the statewide average. Attendance at high school events can serve as an indicator of local sports culture and community engagement with athletics, which may influence the likelihood of residents attending tournaments and ticketed competitions.

More broadly, 18.9% of PMA residents attended a sporting event, while 65.1% reported watching sports via television or online platforms. Elevated levels of sports attendance and viewership reflect strong overall sports affinity within the market. This indicates potential demand for live events, tournaments, and sports-related programming at the proposed facility.

Table 3.13: Attendance at Sporting Events During the Last 12 Months

Category	Fort Myers % of Pop	MPI	PMA % of Pop	MPI	Florida % of Pop	MPI
Attend High School Sports Events	4.0%	87	4.3%	95	4.3%	95
Attend Sports Events	17.4%	88	18.9%	95	19.3%	97
Watch Sports on TV/Online	60.9%	98	65.1%	105	62.6%	101

Source: ESRI Business Analyst, 2026

Table 3.14 presents the sports market potential for specific categories related to athletics. Overall, households in Fort Myers and the PMA demonstrate slightly higher participation in physical activity compared to the national average.

The share of Fort Myers residents who exercise at home more than twice per week is slightly below the PMA and State of Florida averages, while participation in club-based exercise at the same frequency is generally consistent across the regions.

These patterns indicate sustained engagement in physical activity within the local market. This supports demand for facilities that provide structured exercise amenities, fitness programming, and club-based recreation opportunities.

Table 3.14: Sports Market Potential

Category	Fort Myers % of Pop	MPI	PMA % of Pop	MPI	Florida % of Pop	MPI
Exercise at Home 2+ Times/Week	44.0%	96	47.9%	104	46.0%	100
Exercise at Club 2+ Times/Week	13.5%	101	13.6%	102	13.5%	101

Source: ESRI Business Analyst, 2026

A natural byproduct of sports participation is spending on required equipment (Table 3.15). Equipment can range from simple items, such as a basketball, to more complex sets, like full padded gear for sports such as football and baseball. Across all three geographies, spending on equipment is slightly below the national average. The highest expenditures occur in the \$250+ range.

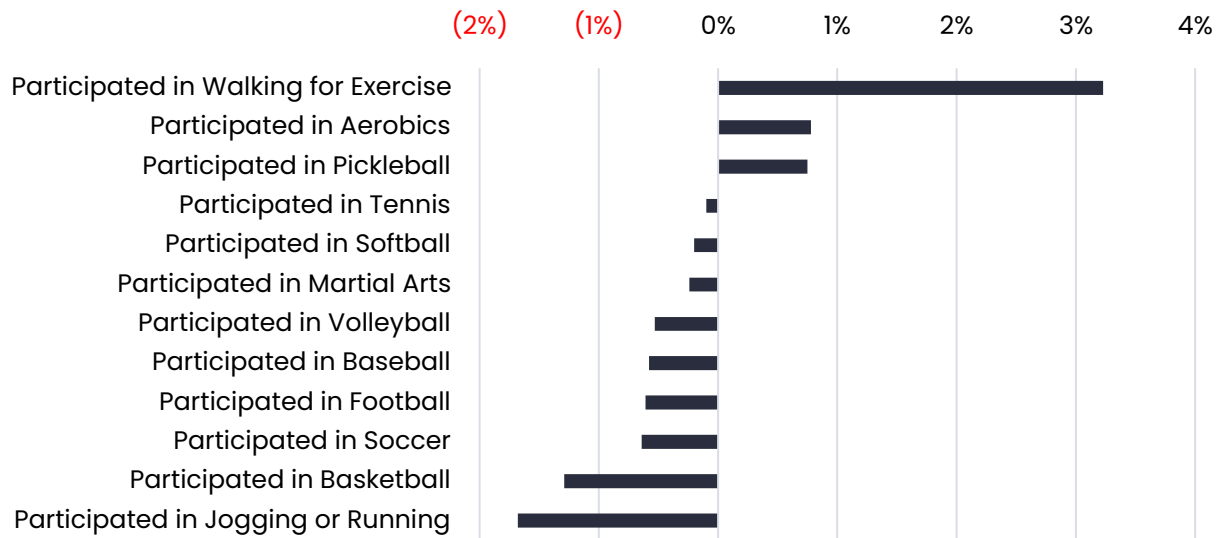
Table 3.15: Sports & Recreation Equipment Spending During the Last 12 Months

Category	Fort Myers % of Pop	MPI	PMA % of Pop	MPI	Florida % of Pop	MPI
Spent \$1–99 on Sports/Recreation Equip.	7.0%	110	6.7%	104	6.5%	101
Spent \$100–249 on Sports/Recreation Equip.	5.4%	84	6.0%	95	6.2%	97
Spent \$250+ on Sports/Recreation Equip.	7.8%	88	9.1%	104	8.7%	98

Source: ESRI Business Analyst, 2026

Figure 3.9 compares sport participation in the PMA with national participation. The largest positive differences in the PMA are for walking for exercise, aerobics, and pickleball, while the largest negative differences are jogging, basketball, and soccer. Although Figure 3.9 highlights these differences, overall variations are small, typically within 1–3%.

Figure 3.9: PMA Sports Participation Rates Compared to National Participation Rates, 2025



Source: ESRI Business Analyst, 2026

Figure 3.9 compares local sport participation with national participation and suggests that the PMA has relatively low participation in some of the primary sports the Facility will offer, such as volleyball and basketball. However, Table 3.14 provides additional context by presenting overall participation rates in the PMA alongside the difference between PMA and U.S. participation. Sports supported at the Facility, including soccer, baseball, and basketball, have at least 2% participation among households in the PMA.

Table 3.16: PMA Sports Participation

Activity	% of PMA Households	PMA vs. U.S. Difference
Participated in Walking for Exercise	35.6%	3.2%
Participated in Aerobics	8.2%	0.8%
Participated in Pickleball	4.4%	0.8%
Participated in Tennis	3.5%	(0.1%)
Participated in Softball	1.6%	(0.2%)
Participated in Martial Arts	1.1%	(0.2%)
Participated in Volleyball	2.1%	(0.5%)
Participated in Baseball	2.4%	(0.6%)
Participated in Football	2.2%	(0.6%)
Participated in Soccer	3.1%	(0.6%)
Participated in Basketball	4.4%	(1.3%)
Participated in Jogging or Running	8.6%	(1.7%)

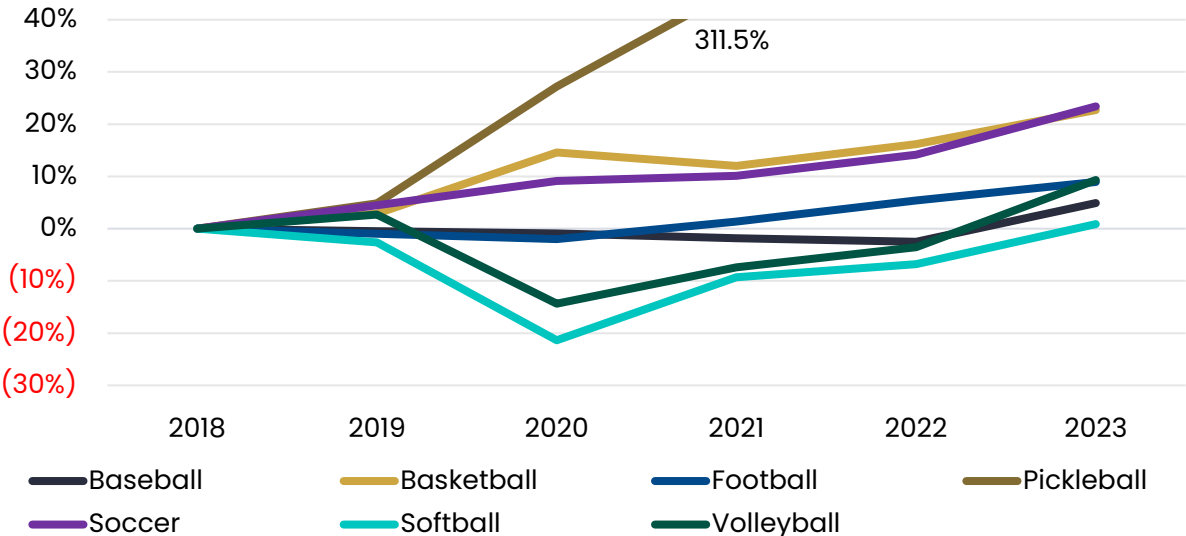
Source: ESRI Business Analyst, 2026

The differences between PMA and U.S. participation rates are relatively small, indicating that local participation levels are generally consistent with national trends. These findings are positive indicators, particularly considering that, as shown in Table 3.2, 7.6% of the PMA population is between the ages of 10 and 17. Once the Facility becomes operational, many of these households are likely to use it.

Figure 3.10 and Figure 3.11 show the national growth in sports participation as reported by the Sports and Fitness Industry Association (SFIA). The SFIA distinguishes between two categories of sports participation: casual and core. Casual participants engage in a sport only a limited number of times per year, as defined by the SFIA. For example, basketball players are considered “casual” if they participate fewer than 13 times annually. The second category, “core” participants, includes individuals who exceed this annual participation threshold.

Figure 3.10 illustrates growth in overall national participation, meaning both casual and core participants are included. Overall, most sports experienced growth through 2023. However, several sports, including softball, volleyball, and baseball, saw significant declines in 2020 before returning to pre-pandemic levels. Notably, pickleball has experienced the most substantial growth nationwide, increasing by more than 300% since 2018.

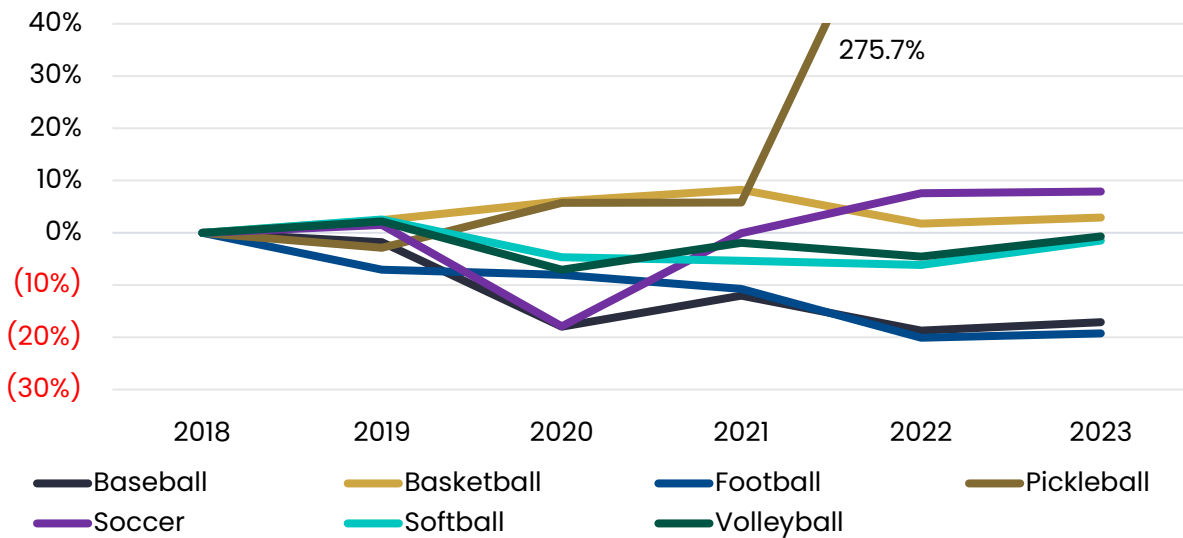
Figure 3.10: National Overall Sport Participation, 2018–2023



Source: Sports and Fitness Industry Association

Figure 3.11 shows national growth in core participants for each sport. Core participation in major sports such as baseball, football, and volleyball has decreased since 2023. Because overall participation increased during this period, this indicates that athletes are diversifying and trying new activities rather than remaining core participants in one or two sports. Casual participants are therefore driving most of the growth observed across sports.

Figure 3.11: National Core Sport Participation Growth, 2018–2023



Source: Sports and Fitness Industry Association

Fort Myers Market Area Industry Performance

It is important to review both local and national trends in the industry sectors most relevant to the future of the sports facility. Growth within a given industry in the Fort Myers PMA is a strong indicator of sustained market demand, while inconsistent or declining employment trends may suggest cyclical demand tied to broader economic conditions. Although employment is an imperfect metric, it is highly correlated with overall industry financial performance.

This section uses employment data from Data Tactical Group (DTG), which provides county-level employment statistics. Because the PMA includes both whole and partial counties, the analysis focuses on Lee County, where the sports facility will be located.

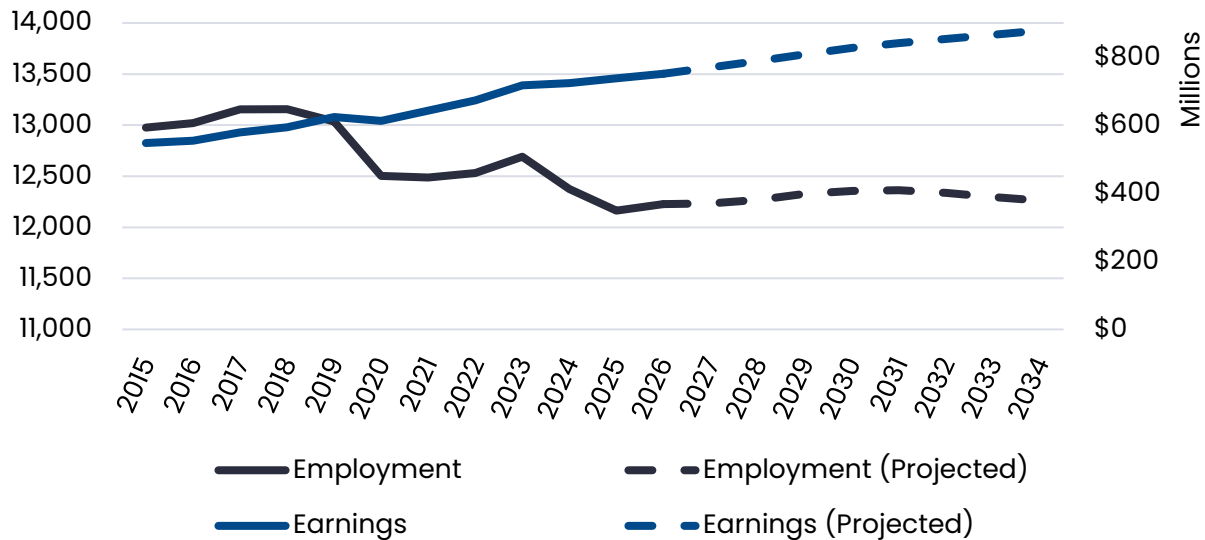
Industry Specific Demands and Projections

Figure 3.12 displays historical and projected employment and earnings for Lee County across all industries. Employment in the County peaked in 2019, just prior to the pandemic, followed by two years of decline. Between 2022 and 2023, employment increased slightly. However, employment fluctuates between 2024 and 2026, with periods of modest increases and decreases. Given the region’s relatively older population, these changes may partially reflect retirements and a gradual decline in labor force participation. From 2026 to 2034, employment is projected to grow at an average annual rate of 0.29%.

Earnings also stalled at the onset of the pandemic, although the decline from 2019 to 2020 was less severe than the drop in employment. Over the past six years, earnings have outpaced employment and are projected to continue doing so through 2034.

Despite the modest growth in employment, these trends are a positive sign for the region's economy. Even though Lee County has a relatively smaller workforce, workers are able to earn higher wages. However, these figures are not adjusted for inflation. This means the real purchasing power of these earnings may be lower than the nominal increases suggest.

Figure 3.12: Projected Earnings & Employment Growth, 2015–2034 in Lee County



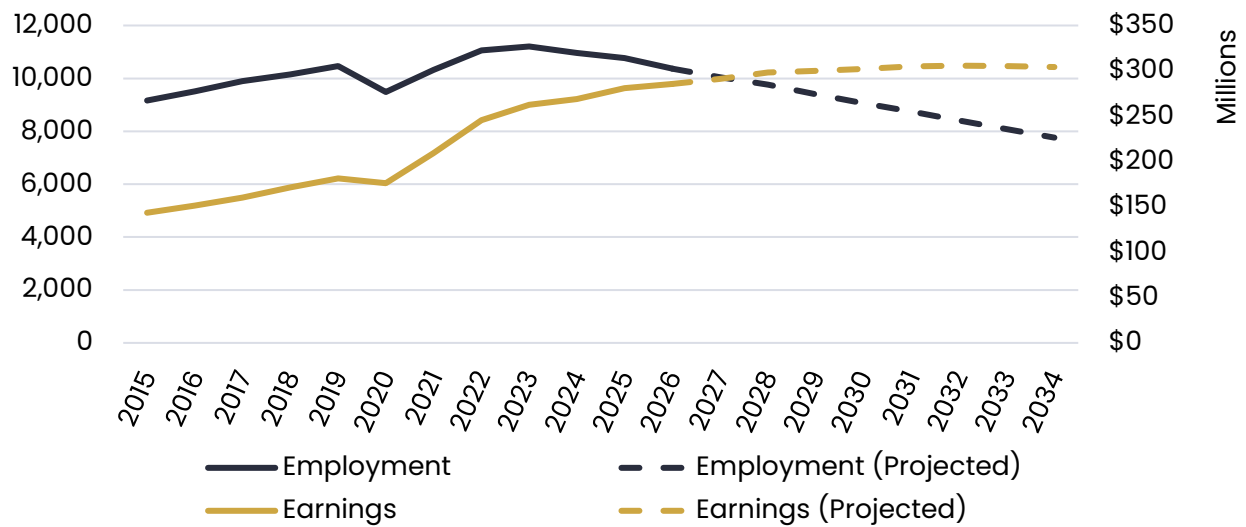
Source: Data Tactical Group (DTG), 2026

Given the context of the sports Facility project, it is important to highlight both historical and projected growth in industries related to the functions of the site. We selected the following industries (by NAICS code) as those most likely to be associated with activity at the Facility.

- 711310 – Promoters of Performing Arts, Sports & Similar Events
- 713940 – Fitness & Recreational Sports Centers
- 713990 – All Other Amusement & Recreation Industries
- 722513 – Limited-Service Restaurants
- 722515 – Snack & Nonalcoholic Beverage Bars

Earnings trends for these industries follow similar historical and projected growth patterns as the overall economy. However, projected employment in these industries shows a slight but consistent decline through 2034 (Figure 3.13).

Figure 3.13: City of Palms Park Site Industries Earnings & Employment Growth, Lee County



Source: Data Tactical Group (DTG), 2026

From an aggregate perspective in Figure 3.13, these industries may appear to be declining. However, when examined by individual industry (Table 3.17) only one (Fitness & Recreational Sports Centers) experienced a decline in employment between 2020 and 2025. After the Facility is built, it is likely that employment in this sector will increase.

Table 3.17: Change in City of Palms Park Site Industries, Lee County

NAICS	Industry Name	2020 Employment	2025 Employment	% Change	Avg Earnings per Worker 2025	LQ
722513	Limited-Service Restaurants	8,153	8,281	1.6%	\$24,653	0.93
722515	Snack and Nonalcoholic Beverage Bars	969	1,214	25.3%	\$26,629	0.63
713940	Fitness and Recreational Sports Centers	846	745	(11.9%)	\$26,918	0.51
713990	All Other Amusement and Recreation Industries	393	399	1.5%	\$48,726	0.59
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities	109	127	16.5%	\$38,676	0.42

Source: Data Tactical Group (DTG), 2026

4. Supply Assessment

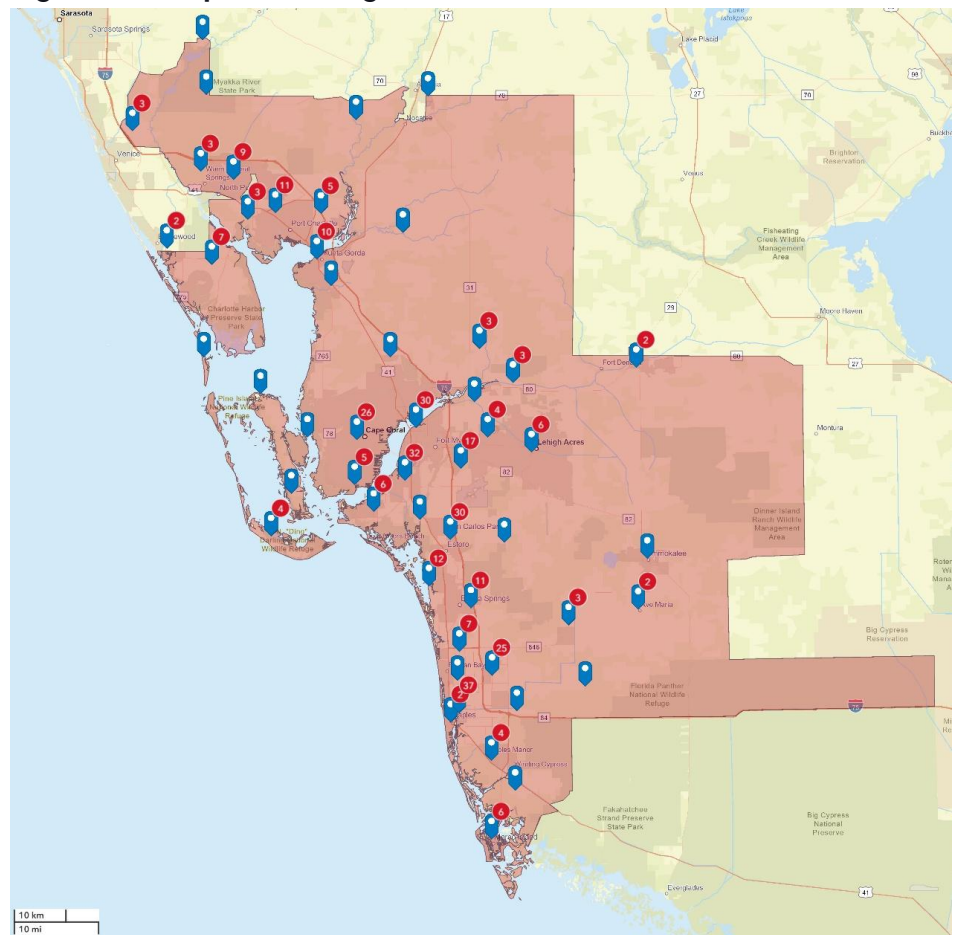
In addition to determining the level of demand among residents in Primary Market Area (PMA), we believe it is equally essential to assess whether existing facilities are adequately meeting the market's needs. The following analysis is based on PC's primary research of local athletic facilities, conducted primarily through web-based sources. PC reviewed a wide range of sports and fitness facilities, from membership-driven gyms to public and privately operated venues, as well as fields, hard courts, and diamonds at various institutions (e.g., schools, churches). The most comparable facilities are highlighted in subsections focused on general facility scope and services, indoor hardwood courts, diamond sports, and outdoor field sports.

Overall Scope of Services

PC conducted a thorough review of the PMA to identify facilities that provide services similar to the Facility. In total, PC reviewed 350 individual fitness facilities, ranging from small-scale gyms to large-scale sports complexes.

Figure 4.1 presents a map of clustered reviewed facilities in the PMA. The majority of these locations should not be considered competitors to the Fort Myers facility due to their limited size or scope. Focusing on potential competition, PC identified 17 standard gym-type facilities, 19 facilities with indoor hard courts, 37 facilities with diamond sports, and 10 facilities with turf fields. As outlined in this section, each peer facility has some limitations related to availability, size and/or scope of services.

Figure 4.1: Map of Catalogued Facilities



Source: Points Consulting using Esri Business Analyst, 2026

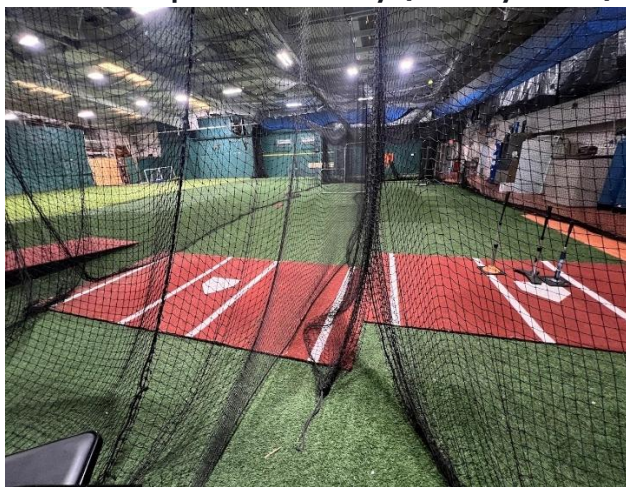
Considering the identified PMA, which includes part or all of six counties, PC found that none of the facilities offer the full spectrum of services at a single location. Some facilities do offer a subset of the services that the Facility will provide. This assessment focuses primarily on the types of services offered rather than their quality; however, high-quality facilities are noted where evident.

Table 4.1: Peer Comparisons to Proposed Fort Myers Facility

Facility	City	Est. Indoor Square Footage	Indoor Courts	Diamonds	Turf Soccer Fields	Features/Amenities
American Sports Academy	North Fort Myers	10,000	N/A	Batting Cages	1	Indoor Field and Batting Cages
Fort Myers Stars Complex	Fort Myers	31,700	2	4	N/A	Current expansion happening
North Collier Regional Park	Naples	6,000	2	5	4	Also has a pool/water park
Immokalee Sports Complex	Immokalee	6,000	1	N/A	3	Has a pool; Currently upgrading soccer fields to turf
Proposed Facility	Fort Myers	150,000–200,000	5–7	TBD	1–2	Various tournaments and programming

Source: Points Consulting, 2026

Figure 4.2: Interior Batting Cages at American Sports Academy (Fort Myers, FL)



Courtesy: American Baseball Academy Batting Cages, facebook.com

Figure 4.3: Aerial View of STARS Complex (Fort Myers, FL)



Courtesy: Lee County, Southwest Florida

Figure 4.4: Indoor Courts at North Collier Regional Park (Naples, FL)



Courtesy: Collier County Parks & Recreation

Unique Features of the Facility

Based on available data on nearby facilities, while there are many sports complexes and parks with courts and fields in the PMA, the vast majority are outdoor facilities (particularly for soccer and baseball). The PMA could readily absorb additional indoor turf space that can be used year-round in all weather conditions. Additionally, most indoor facilities accommodate only one or two sports. The proposed Facility would serve as a nexus for a wide variety of sports activities. This would allow for maximized utilization with minimal seasonal downtime.

PC concludes that the presence of the proposed Facility would not substantially compete with the Skatium located across the street from the proposed site. This facility, although used for a multitude of sports, is primarily used for skating and hockey (both on and off the ice) and features limited gym space in comparison to the proposed Facility.

No regional facilities are directly comparable to the proposed Facility. The four most comparable sites are summarized in high level comparison in Table 4.1. The American Sports Academy provides indoor fields and training grounds, but at a much smaller scale. The Fort Myers STARS Complex, North Collier Regional Park, and Immokalee Sports Complex each accommodate multiple sports but lack sufficient indoor hard courts to host larger tournaments under one roof. Additionally, their turf fields are located outdoors. The proposed Facility could fill this gap by providing indoor turf for practice

during inclement weather and hot summer days. The nearest facility with extensive indoor hard courts and indoor turf is IMG Academy in Bradenton, FL, located outside of the PMA.

The location of the proposed Facility is also a unique advantage. It is embedded within the City's central grid, making it easily accessible from major local roads, but also is within 5 miles of Interstate 75 providing ease of access for both local residents and visitors traveling in for tournaments and events from elsewhere. Its location in Midtown also means it is a central location within 1.5 miles of both Fort Myers High School and Fort Myers Middle School, as well as near commercial and residential areas.

Indoor Hardwood Sports

Table 4.2 displays selected peer facilities with indoor hardwood courts. This analysis also notes that indoor basketball courts can accommodate other sports with appropriate equipment, such as volleyball, indoor soccer, badminton, and futsal. Many hard courts in the region are located at privately operated institutions, such as churches and schools. These facilities are frequently subject to use limitations and are therefore often unavailable for regular evening use or large-scale tournaments. There are also several community recreation centers that allow for open play and league play and may support smaller tournaments.

Alico Arena is the home venue for Florida Gulf Coast University basketball and volleyball and, as such, regularly hosts home games and NCAA Division I tournaments. The facility is also available for rent for a wide variety of events. There are four full-sized courts at Alico Arena, and the main arena seats 4,500, providing the capacity to host large-scale tournaments.

Babcock Ranch Fieldhouse hosts school and community events, including sports leagues and open gym activities, and has the capacity to support small-scale tournaments. However, it is primarily reserved for Babcock High School athletics.

Florida Conquer Volleyball, which features three dedicated indoor volleyball courts, serves as a hub for competitive volleyball in the region and regularly hosts local and regional tournaments.

The IMG Academy Basketball Center is part of the IMG Academy campus in Bradenton, Florida. While it is located outside of the PMA, it is worth noting as one of the leading basketball hubs in the United States, located approximately two hours from Fort Myers. The facility includes eight high-quality courts, as well as an arena with a seating capacity of 1,300. Its primary use is for IMG Academy's athletic programs, including practices and competitions.

Table 4.2: Peer Local Indoor Hardwood Sports Facilities

Facility	City	Est Indoor Square Footage	Number of Courts	Cost Structure	Features/ Amenities
Alico Arena	Fort Myers	131,000	4	Arena rentals & admission fees	Primarily focused on FGCU sports
Babcock Ranch Fieldhouse	Punta Gorda	40,600	3	Membership & rental fees	Sports courts and a cafeteria/meeting room
Florida Conquer Volleyball	Fort Myers	13,500	3	Entry & League fees	League play & open gym
IMG Academy Basketball Center	Bradenton	115,000	8	Court rentals & admission fees	Regularly hosts national tournaments

Source: Points Consulting, 2026

Figure 4.5: Alico Arena Indoor Stadium Court (Fort Myers, FL)



Courtesy: FGCU Athletics

Figure 4.6: Babcock Ranch Fieldhouse Indoor Court (Punta Gorda, FL)



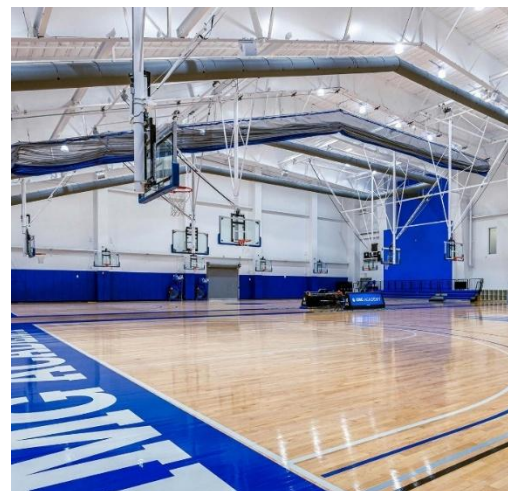
Courtesy: Babcock Ranch Living

Figure 4.7: Florida Conquer Volleyball Indoor Court (Fort Myers, FL)



Courtesy: Florida Conquer Volleyball

Figure 4.8: IMG Academy Basketball Center (Bradenton, FL)



Courtesy: IMG Academy

Diamond Sports

Table 4.3 identifies the primary locations with which the proposed Facility would compete for the use of baseball or softball diamonds and/or batting cages. This region of Florida has a large supply of baseball diamonds at local parks and schools, with little to no apparent limits on residents' recreational use. However, PC's analysis focuses primarily on facilities that offer a large number of diamonds or are suitable for hosting large-scale tournaments. The four facilities that stand out as the strongest potential competitors are Paradise Coast Sports Complex, Englewood Sports Complex, Cape Coral Sports Complex, and the Player Development Sports Complex.

Paradise Coast Sports Complex is quickly becoming a premier sports and special events destination and has plans to expand into diamond sports with the construction of five softball and six baseball diamonds, along with batting cages, within the next few years. This expansion would allow large-scale tournaments to be held entirely within the complex.

Englewood Sports Complex contains 10 diamonds, including two full-size baseball fields, two full-size softball fields, and six youth/Little League fields. It is home to Englewood Area Youth Baseball Little League.

Cape Coral Sports Complex hosts Junior and Big League Baseball leagues, as well as an adult men's softball league. It consists of nine diamonds and regularly hosts state and national tournaments.

The Player Development Complex has fewer diamonds (only five). However, it also contains eight batting cages and provides a strong environment for athletes to hone their skills.

Fort Myers also has two notable indoor batting cage facilities: Gradum Gswing, a professional training facility, and American Sports Academy, which is available for private lessons or batting cage rentals.

Table 4.3: Peer Local Diamond Sports Facilities

Facility	City	Number of Diamonds	Number of Batting Cages	Features/Amenities
Paradise Coast Sports Complex	Naples	~11	Yes	Development planned for 5 softball and 6 baseball diamonds
Englewood Sports Complex	Englewood	10	N/A	Also has soccer fields and indoor courts
Cape Coral Sports Complex	Cape Coral	9	N/A	Regularly hosts state & national tournaments
Player Development Complex	Fort Myers	5	8	8,200 seat main stadium

Source: Points Consulting, 2026

Figure 4.9: Englewood Sports Complex Little League Diamonds (Englewood, FL)



Courtesy: Englewood Area Youth Baseball

Figure 4.11: Cape Coral Sports Complex (Cape Coral, FL)



Courtesy: Visit Florida

Figure 4.10: Lee County Player Development Complex (Fort Myers, FL)



Courtesy: wanderlog.com

Field Sports

Table 4.4 outlines locations with indoor or outdoor football or soccer fields that could provide some level of competition with the Facility. In terms of outdoor field space, there are numerous options in the region. Most notably, Paradise Coast Sports Complex and North Collier Regional Park are considered premier sporting venues in Southwest Florida, offering nine and eight fields, respectively. Both venues regularly host large tournaments and are home to multiple local soccer and football leagues.

Other prominent facilities in the area include Big Corkscrew Island Regional Park (four fields), Frank E. Mackle Community Park (six fields), Kelly Road Soccer Complex (six

fields), and Cape Coral Sports Complex (five fields). Finally, many schools in the region also have fields. These are likely reserved, however, for their respective institutions.

With respect to turf fields, several are located at Paradise Coast Sports Complex, North Collier Regional Park, Big Corkscrew Island Regional Park, with additional fields under construction at Immokalee Sports Complex. Based on our research, these fields are heavily utilized, and most sites indicate that open community play is limited to weekday mornings and afternoons. Availability during evenings and weekends is minimal due to league play, tournaments, and special events.

Additionally, indoor turf fields are available at Soccer Roots in Fort Myers, which are offered for rental and used for training camps and community leagues.

Table 4.4: Peer Local Soccer & Football Field Facilities

Facility	City	Number of Fields	Cost Structure	Features/ Amenities	Synthetic Turf?
Paradise Coast Sports Complex	Naples	9	Registration & Rental Fees	Includes one stadium field with 3,500 seats	Yes
North Collier Regional Park	Naples	8	Facility rentals	Regularly hosts tournaments and other large events	Yes
Big Corkscrew Island Regional Park	Naples	4	Facility rentals	Planning 4 more fields	Yes
Frank E Mackle Community Park	Marco Island	6	N/A	N/A	No
Kelly Road Soccer Complex	Fort Myers	6	N/A	Dedicated soccer complex, regularly holds tournaments	No
Cape Coral Sports Complex	Cape Coral	5	N/A	Home of Cape Coral Youth Soccer Association	No
Immokalee Sports Complex	Immokalee	3	N/A	Upgrade to turf fields in progress	No
Soccer Roots	Cape Coral	2	Facility rentals	Indoor soccer complex	Yes

Source: Points Consulting, 2026

Figure 4.12: Paradise Coast Sports Complex Outdoor Fields (Naples, FL)



Courtesy: Playparadisecoast.com

Figure 4.13: Soccer Fields at North Collier Regional Park (Naples, FL)



Courtesy: Collier County Parks & Recreation

Figure 4.14: Kelly Road Soccer Complex (Fort Myers, FL)



Courtesy: Kelly Road Soccer Complex, Yelp.com

Figure 4.15: Soccer Fields at Big Corkscrew Regional Park (Naples, FL)



Courtesy: Collier County Parks and Recreation

Figure 4.16: Soccer Roots Indoor Facility



Courtesy: Soccer Roots, Your Facility Gallery

5. Economic Impact Analysis

Introduction

An important tool in any real estate development involving a public-private partnership is an Economic Impact Analysis (EIA). Such analyses shift the conversation from economic benefits realized by the developer to those experienced by the broader community. An EIA quantifies the value of an event or project to a regional economy by modeling its ripple effects on job creation, employee earnings, economic output, and tax revenue (see Figure 5.1 for details). Such analyses can also be used to compare the costs and benefits of a variety of public and private development options, which must also be considered in light of operational capabilities, risk tolerance, and net public benefit.

In this analysis, PC measures the impact of the proposed Fort Myers Facility on two regions of analysis: Lee County, Florida and the state of Florida.¹²

It is important to note that in this study, PC is measuring the annual impact of the Facility once fully operational and integrated within the regional economy. Like any new development, there is a ramp-up period during which usage (and, therefore, economic impacts) have not yet reached their optimal levels. We expect that full community absorption of the Facility will take between 18 and 24 months following completed construction (in accordance with past experiences of C&A).

Annual EIA Results

[Chapter 3](#) focuses on outlining the basis of local consumer demand, whereas this chapter focuses primarily on non-local users. As previously noted, C&A has an opportunity to provide a valuable community amenity by meeting local demand,

Figure 5.1: Economic Impact Analysis Definitions



Jobs

The number of full- or part-time jobs created or supported because of the Facility



Earnings

The earnings of jobs created or supported because of the Facility



Economic Output

The dollar value of increased regional economic transactions because of the Facility (also known as sales)



Tax Revenue

Tax revenues that can be attributed to the economic activity of the Facility

¹² Though most of the proposed Facility's impact will be felt in the City of Fort Myers, economic impact models function best when conducted at the county or multi-county level. In light of the nature of industry trade, it is necessary to analyze larger economic areas, as these will better represent the spending patterns of residents and the supply-chains of regional businesses.

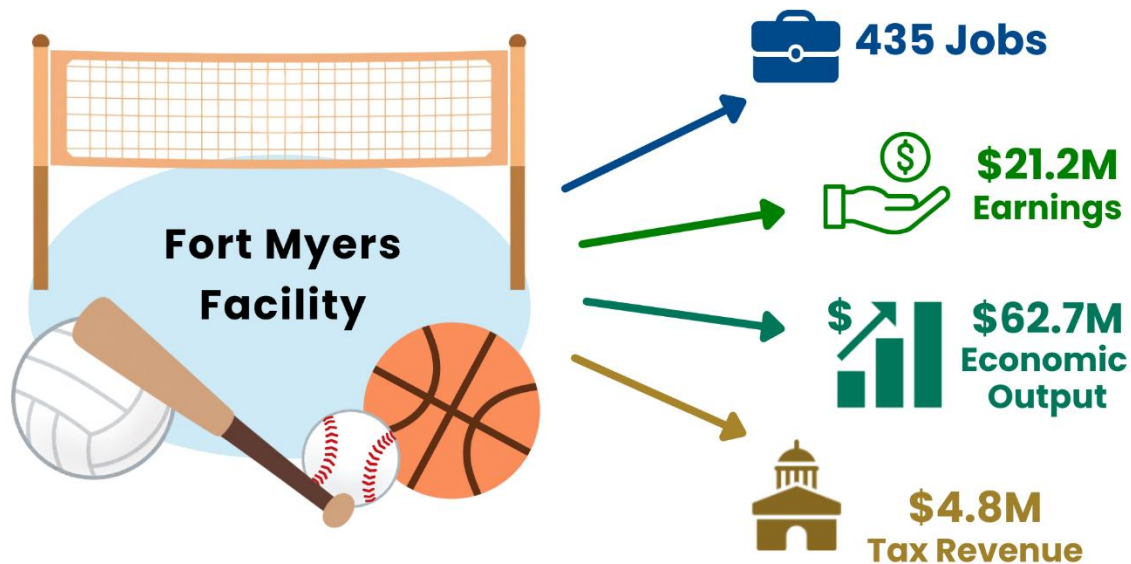
though the amenity's economic impact is largely driven by out-of-region visitors.

The ability to generate economic impact will depend upon C&A's ability to attract, manage and host regional and national sports tournaments. This ability itself is largely driven by facility quality, staff capabilities and connections with existing league and tournament organizations. Though local visitors would certainly attend tournaments and events, they will spend far less than attendees travelling from outside of the region.

For both the construction and operations phases, PC quantifies the economic impact across the following categories:

- **Direct Effect:** Spending generated directly by the Facility itself or by visitors to the Facility.
- **Indirect Effect:** The ripple effect on suppliers and vendors that support the direct activities.
- **Induced Effect:** Household spending by employees whose jobs are supported either directly or indirectly by the Facility.
- **Total Effect:** The overall economic impact, accounting for how direct spending "ripples" throughout the regional economy through inter-industry transactions (e.g., vendors and suppliers) and household consumption (e.g., individual spending).
- **Multiplier Effect:** A metric that divides the total impact by the direct impact, providing a helpful tool for comparing the relative strength of an economic impact.

Figure 5.2: Annual Economic Impact of the Fort Myers Facility to Lee County



As summarized in Figure 5.2 and Table 5.1 the proposed Fort Myers Facility would deliver substantial economic impact to its host region and state. Lee County will

benefit from operational and visitor impacts, generating 435 jobs and \$21.2 million in annual earnings. Those jobs would be supported by more than \$62.7 million in increased annual economic output. As with any EIA, results are most accurately measured at the county level rather than the city level. This is because counties better approximate individual and business commuting and spending patterns. That said, given that Fort Myers is the host city, we expect much of the Facility’s impact would occur there. However, visitors to the Facility will also patronize businesses in other predominant cities, such as Cape Coral and Bonita Springs.

In addition to local impact, the state of Florida would also experience net increase of 262 jobs, nearly \$40.0 million in annual output, and \$14.0 million in annual earnings. Though counterintuitive, there is a sound rationale for state-level impacts being lower than those of Lee County. As noted in the following [Methodology Section](#), the spending contribution of visitors are only counted for individuals who reside outside the given geography. In this case, since most of projected facility visitors are Floridians from outside of Lee County, the net economic impact is stronger within Lee County than within the state as a whole.

Table 5.1: Average Annual Economic Impact

Lee County					
Category	Direct	Indirect	Induced	Total	Multiplier Effect
Economic Output (Sales)	\$37.8M	\$10.8M	\$14.2M	\$62.7M	1.66
Earnings	\$11.5M	\$4.2M	\$5.5M	\$21.2M	1.84
Jobs	279	71	85	435	1.56
Florida					
Category	Direct	Indirect	Induced	Total	Multiplier Effect
Economic Output (Sales)	\$17.1M	\$6.9M	\$15.6M	\$39.6M	2.32
Earnings	\$5.4M	\$2.7M	\$5.9M	\$14.0M	2.61
Jobs	125	43	94	262	2.10

Source: Points Consulting using Lightcast, 2026

Construction EIA Results

Although the Facility will not reach full operational capacity for several years, the development process will still generate employment opportunities and economic output through construction, landscaping, engineering, and related activities. These jobs will create ripple effects in the surrounding communities, although the impacts will be short-term until construction is complete.

Table 5.2 shows the economic impacts of the entire construction process in Lee County and Florida. Noticeably, impacts in Lee County are smaller in this model than in the broader region, which is the inverse of the previous economic impact model. This

difference can be attributed to the nature of the activity being modeled and the manner in which new economic activity enters the system.

The operational model for the Facility was driven by both ongoing operations and projected visitation, measuring new spending by visitors, residents, and event participants. Within this framework, the impact originates from outside the region and flows into Lee County as new demand for goods and services. In this model, much of the demand is external to the County but internal to Florida.

The construction model, however, is fundamentally different. Rather than measuring new consumer demand entering the region, it measures the supply-side activity required to build the site. This phase is driven not by external visitor spending, but by capital investment, which flows through existing production supply chains. The construction model also incorporates demolition costs for the City of Palms Park Facility.

Construction in Lee County relies on a broader regional supply chain that draws workers from across Florida and, in some cases, beyond. This model focuses on new investment and short-term jobs that do not currently exist. For example, a Cape Coral architect hired to design the stadium represents new work that would not have occurred without the project. In contrast, a new visitor to the site from Cape Coral would have spent money in Florida regardless, as reflected in the previous model.

Given the nature of the construction industry, we expect these jobs to be both created and completed by the construction process. Some jobs may deviate from this pattern. The operational and construction models also represent different types of economic shocks, which are described in the Methodology section.

To summarize, this model does not track new external demand for employment at the Facility. Instead, it shows that of all the jobs created or supported by the new capital investment, 375 jobs occur somewhere in Florida, while 383 occur in Lee County.

Table 5.2: Construction Impact

Category	Lee County				Multiplier Effect
	Direct	Indirect	Induced	Total	
Economic Output (Sales)	\$75.4M	\$19.0M	\$23.7M	\$118.1M	1.57
Earnings	\$31.7M	\$6.8M	\$9.3M	\$47.8M	1.51
Jobs	383	106	152	641	1.67
Category	Florida				Multiplier Effect
	Direct	Indirect	Induced	Total	
Economic Output (Sales)	\$75.4M	\$29.2M	\$68.6M	\$173.1M	2.30
Earnings	\$31.7M	\$10.1M	\$26.1M	\$67.9M	2.14
Jobs	375	141	407	923	2.46

Source: Points Consulting using Lightcast, 2026

Tax Impact

An Economic Impact Analysis (EIA) is a tool designed to assess the broader implications that a singular “event” (or set of events) has within a specific economic region. When conducted effectively, it provides not only a general sense of an event’s economic benefits, but also details on specific elements of those impacts, such as the revenue accruing to county or state governments through new or increased taxes. Tax generation estimates can include lodging, property, sales, and local income taxes. This does not include Florida’s Rental Car Surcharge, as it is unclear how many visitors would rent vehicles and for how long.¹³

As shown in Table 5.3, Lee County will collect approximately \$2.0 million from sales/use, property, and the Tourist Development Tax. Florida will collect \$4.8 million from sales and corporate income taxes. These figures assume the Facility is operating at full capacity.

Table 5.3: Lee County and Florida Fiscal Impacts of Operations

Lee County	
Category	Tax Revenue
Property Tax	\$876,000
Sales/Use Tax	\$314,000
Lee County Tourist Development Tax	\$786,000
Total	\$1,976,000
Florida	
Sales Tax	\$4,756,000
Florida Corporate Income tax	\$25,000
Total	\$4,781,000

Source: Points Consulting using Lightcast, 2026

Table 5.4 presents the estimated sales tax impact generated during the construction period as development activity increases spending and employment across the region. For this analysis, PC assumes that while many construction materials and inputs can be sourced within Lee County, some materials will likely be purchased outside the County. As a result, a portion of the associated sales tax revenue accrues to the State of Florida rather than Lee County. This is one reason the County’s projected tax revenue is smaller than Florida’s revenue. Additionally, Lee County’s discretionary sales surtax rate is only 0.5%, compared to Florida’s 6.0% state sales tax rate.

¹³ “Rental Car Surcharge,” Florida Department of Revenue, accessed March 10, 2026, https://floridarevenue.com/taxes/taxesfees/Pages/solid_waste.aspx.

Please note that a portion of the construction costs includes professional services such as architectural and legal services, which are not subject to sales tax under Florida law.¹⁴

Table 5.4: Fiscal Impact of Construction

	Lee County	Florida
Construction Sales Taxes	\$273,000	\$3,672,000

Source: Points Consulting using Lightcast, 2026

Detailed Jobs Impact

We expect the Fort Myers Facility to positively impact numerous industry sectors in Lee County. The largest number of jobs would be added in expected sectors, including Accommodation & Food Services (+212 jobs) and Retail Trade (+57 jobs). Additionally, new visitors' spending in the area would support an additional 85 jobs in Arts, Entertainment & Recreation. This sector includes the Fitness & Sports Centers industry as well as direct C&A employees.

Other, potentially less intuitive impacts would include 21 additional jobs in Real Estate & Rental & Leasing, 17 in Administrative & Support & Waste Management and Remediation Services and 15 jobs in Other Services (except Public Administration).

Out of the 297 jobs generated in the three most impacted industries, PC estimates that only 41 would be directly associated with the Facility. The remaining 256 jobs would be result from visitor spending and broader economic activity within the surrounding Midtown area, benefiting local restaurants, retailers, and entertainment venues. This demonstrates that the majority of employment impacts extend beyond the Facility itself and highlights the Facility's role as a catalyst for wider economic activity and ongoing revitalization.

Table 5.5: Lee County Total Jobs Impact by Industry Sector

Sector Name	Total Net Jobs Added
Accommodation & Food Services	212
Retail Trade	57
Arts, Entertainment & Recreation	28
Real Estate & Rental & Leasing	21
Administrative & Support & Waste Management & Remediation Services	17
Other Services (except Public Administration)	15

¹⁴ Florida Statutes, § 212.08, "Sales, Rental, Use, Consumption, Distribution, and Storage Tax; Specified Exemptions," 2021, Florida Legislature, accessed March 12, 2026, <https://www.flsenate.gov/Laws/Statutes/2021/212.08>.

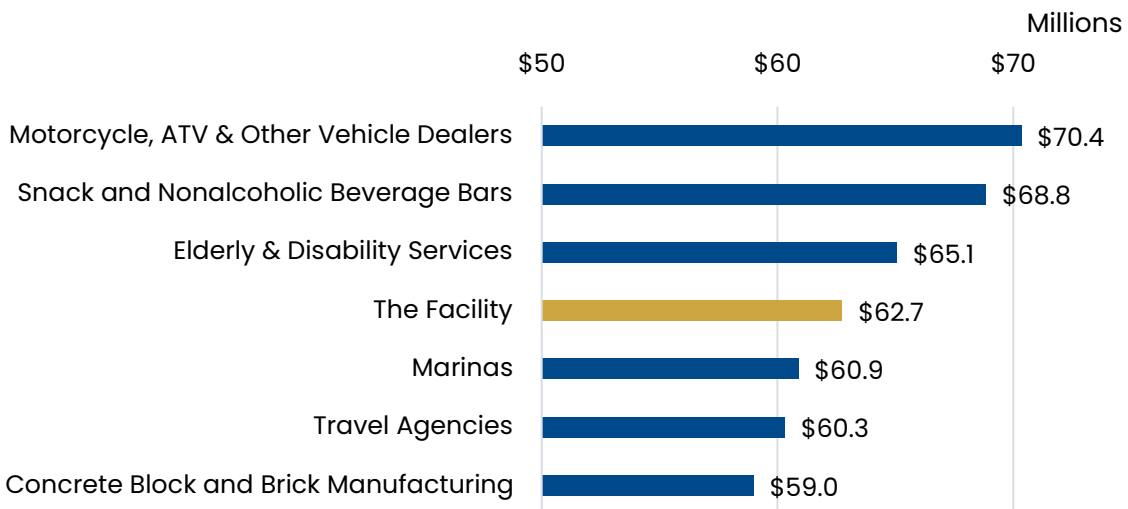
Public Administration	13
Health Care & Social Assistance	13
Professional, Scientific & Technical Services	13
Finance & Insurance	12
Transportation & Warehousing	10
Construction	8
Management of Companies & Enterprises	4
Wholesale Trade	2
Educational Services	2
Information	2
Manufacturing	2
Agriculture, Forestry, Fishing & Hunting	2
Utilities	1
Mining, Quarrying & Oil & Gas Extraction	0

Source: Points Consulting using Lightcast, 2026

Economic Impact Comparison

To allow for a fair comparison, PC simulated the total sales impact of similar industries (Figure 5.3). These annual sales figures should be viewed as approximations, as PC did not collect data from specific businesses within these industries. To provide a range of comparison, we benchmarked the Facility against a mix of service-type industries common to any region, as well as unique local businesses familiar to residents of Lee County.

Figure 5.3: The Facility’s Impact Compared to Other Industries in Lee County



Source: Points Consulting using Lightcast, 2026

The Facility's projected economic impact is comparable to several existing recreational industries in the region. For example, the Motorcycle, ATV & Other Vehicle Dealers industry generates approximately \$70.4 million in economic output. This is only slightly higher than the Facility's projected output at full capacity. In addition, the Facility is expected to generate more economic output than the Marinas industry, which produces roughly \$60.9 million annually in economic value.

EIA Methodology Notes

As with any professional EIA, PC's approach focuses on measuring the net (or "but for") impact on aforementioned regions by discounting gross impacts using counterfactual arguments. This factor is particularly important when considering visitors from within the Primary Market Area (PMA) that are anticipated to visit Fort Myers as a result of the Facility. For this reason, PC takes the conservative approach and only includes spending by adult visitors from outside of the region of analysis (i.e., Lee County or Florida). The underlying assumption here is that in the absence of the Fort Myers Facility, residents would "substitute" their spending toward other athletic or recreational activities within the same geographic area.

To determine the economic impact of the proposed Fort Myers Facility, C&A provided PC with anticipated operational costs. PC verified that the projected revenue and spending fall within reasonable expectations for gyms and sports facilities by performing several benchmarking estimates. For example, PC compared revenue per square footage for gyms in Florida, as well as for C&As' other existing facilities in Mishawaka and Lebanon, Indiana. In order to protect C&A's confidential information, precise annual operational costs are not provided within this report. However, these values are built into the EIA.

Forecasting the number of visitors and their anticipated spending required PC to build an economic model from a variety of data sources. C&A provided the estimated proportion of unique visitors to its other existing facilities, which was then combined with industry benchmarking data on the number of users and visitors to fitness centers. The data allowed PC to predict the total number of visitors from outside of the given geographic areas. To estimate spending, PC relied primarily on data from the Florida Department of Tourism (specifically, the 2024 Rockport Analytics report on the economic impact of tourism in the state, provided by Visit Florida).¹⁵ This report provides statistics on daily spending for visitors to the state with distribution by visitor spending categories. The data were then adjusted by PC to account for unique spending patterns of youth sports travelers and other dynamics specific to the local market area.

¹⁵ Visit Florida, *The 2024 Economic & Fiscal Impact of Tourism in Florida* (Tallahassee, Florida: Visit Florida, 2025), <https://visitflorida.app.box.com/s/1n07pedhhec65xntd1leq36gr4412pvv>.

Both the construction and operations analyses used input-output modeling, though they represent different types of economic shocks. For the construction phase, we treated project expenditures as a one-time increase in final demand for construction services. This propagates through supplier industries and labor income. In the operations phase, we treated visitor and business spending as ongoing final-demand inflows that support annual activity in the service industries. Although the model structure is identical, the nature and direction of the demand inputs differ. This results in distinct economic impact results.

Appendix A: Additional Data

Table A.1: Top Tapestry Segments

Rank	Tapestry Segment	PMA		United States	
		% of Households	Cumulative % of Households	% of Households	Cumulative % of Households
1	Silver and Gold (J4)	19.2%	19.2%	4.5%	4.5%
2	The Elders (J2)	11.9%	31.2%	3.9%	8.5%
3	Rural Resort Dwellers (I5)	7.6%	38.7%	3.6%	12.1%
4	Burbs and Beyond (K8)	7.0%	45.7%	3.0%	15.2%
5	Up and Coming Families (G2)	5.8%	51.4%	3.0%	18.1%
6	Retirement Communities (J3)	4.9%	56.3%	1.7%	9.7%
7	Dreambelt (K5)	4.3%	60.7%	3.0%	12.7%
8	Senior Escapes (J1)	3.9%	64.6%	0.6%	13.3%
9	Flourishing Families (H1)	3.2%	67.8%	3.6%	16.9%
10	Room to Roam (K7)	2.8%	70.5%	3.9%	20.9%
11	Loyal Locals (K3)	2.6%	73.1%	2.8%	23.7%
12	Savvy Suburbanites (L1)	1.9%	75.0%	4.5%	28.2%
13	Family Bonds (E6)	1.9%	77.0%	1.5%	29.7%
14	Welcome Waves (A5)	1.8%	78.7%	0.7%	30.4%
15	Classic Comfort (K4)	1.7%	80.4%	2.9%	33.4%
16	Shared Roots (G1)	1.5%	81.9%	0.90%	34.30%
17	Moderate Metros (C6)	1.5%	83.4%	2.30%	36.60%
18	Legacy Hills (K1)	1.5%	84.9%	1.70%	38.30%
19	Modern Minds (D3)	1.3%	86.2%	1.90%	40.20%
20	Generational Ties (G3)	1.2%	87.4%	1.40%	41.60%

Source: ESRI Business Analyst, 2026