



SPORTS TOURISM FACILITY EXPANSION STUDY

APRIL 12, 2017





TABLE OF CONTENTS

Executive Summary	3
1. Introduction	13
2. Demographic & Socioeconomic Analysis	16
3. Recent Lee County Sports Tourism Trends	32
4. Local Facility Inventory	44
5. Comparative Facilities - Regional/National	73
6. Local Interview & Focus Group Summary	106
7. Event Interview Summary	115
8. Survey Results	122
9. Market Opportunities & Facility Recommendations	139
10. Economic & Fiscal Impact Analysis	151
Appendix: Verbatim Comments from Focus Groups & Surveys	161



EXECUTIVE SUMMARY



DEMOGRAPHIC & SOCIOECONOMIC ANALYSIS



Metropolitan Statistical Area (MSA) - A MSA is defined by U.S. Office of Management & Budget as adjacent counties with high degree of social/economic integration with urban core of 50,000 people or more. Geographically defined as Lee County, the Cape Coral-Fort Myers MSA (Lee County MSA for the remainder of this report) has a population of more than 680,000 people.

Population Data - Compared to the national average, Lee County has an older median age and a smaller share of the population that is under 18 years of age. Lee County age statistics reflect a smaller share of working age population and young families primarily due to the County's status as a prominent retirement destination. Despite Lee County's smaller share of under-18 population relative to the national average, it should be noted that the total number of children living in the County has increased by nearly 45% since 2000, indicating a rapidly growing market for youth sports participation. Over the next five years, the County's population is expected to continue growing by more than 2% annually, as shown below. The Lee County MSA's population is clustered in the Fort Myers, Cape Coral, and Bonita Springs areas. There are relatively few residents northwest of Fort Myers. In Lee County, older age groups (retirees) tend to be clustered in the beach communities, with younger median ages around Fort Myers, northwest Cape Coral, and Lehigh Acres. Lee County is about the same as the U.S. average in terms of the percentage of households with children, which is a positive indicator for youth sports demand, especially for a community with a significant retiree population. Median household income levels within the MSA tend to be higher in the Estero area, and lower in Fort Myers.

Comparative Markets - Victus Advisors compared Lee County's demographic and socioeconomic characteristics to the following competitive set:

Florida

- Tampa-St. Petersburg-Clearwater MSA
- North Port-Bradenton-Sarasota MSA
- Seminole County (Orlando-Kissimmee-Sanford MSA)
- Polk County (Lakeland-Winter Haven MSA)
- Palm Beach County (Miami-Ft. Lauderdale-Pompano Beach MSA)
- Panama City Beach (Panama City MSA)

Out of State

- Myrtle Beach, South Carolina (Myrtle Beach-Conway-North Myrtle Beach MSA)
- Gatlinburg, Tennessee (Sevierville Micro SA)
- Pigeon Forge, Tennessee (Sevierville Micro SA)
- Emerson, Georgia (Bartow County)
- Foley, Alabama (Daphne-Fairhope-Foley Micro SA)

The Lee County MSA's population of 685,683 represents the fifth most populated out of the 11 competitive markets selected for comparative analysis. The projected growth rate of the Lee County MSA is well above the average and median among comparative markets. The Lee County MSA's median age of 47.4 is above both the average and median among comparative markets, which reflects the market's status as a prominent retirement destination. Despite Lee County's status as a retirement destination, and subsequent older median age, the County is close to the median among 11 comparative markets in terms of the percentage of households in the market that have children under 18, a positive sign for present and future youth sports and family recreation demand. Among comparative markets, the Lee County MSA has the fifth largest corporate base, which can be an indicator for potential corporate sponsorship/advertising support of sports tourism facilities and tournaments/events.



RECENT LEE COUNTY SPORTS TOURISM TRENDS



Lee County Sports Tourism Overview - In recent years, it has been estimated that amateur sports tourism in Lee County has generated as much as 160,000 annual room nights and more than \$105 million in annual economic impact (2014).

Lee County 2015 Hotel Data - County-wide, total hotel occupancy and average daily rates were at their lowest during the summer months in Lee County in 2015. This trend presents an opportunity for Lee County Sports Development as most outdoor youth sports tourism occurs during the summer months, and sports families on budgets will be more willing to travel to Lee County due to its relatively affordable rates during that season.

2015 Estimated Room Nights By Sport - Amateur baseball and softball visitors booked more than an estimated 111,000 room nights in Lee County in 2015. This accounted for 73% of total room nights booked in Lee County for sports tourism in 2015.

2015 Estimated Events By Sport - Baseball and softball events accounted for over 50% of Lee County's amateur sports tourism events for 2015.

2015 Estimated Total Economic Impact - Baseball and softball events had an estimated total economic impact of just over \$77 million. This accounted for 75% of Lee County's overall amateur sports tourism economic impact in 2015.

2015 Estimated Amateur Sports Visitors - Just under 95,000 total amateur sports visitors traveled to Lee County for baseball or softball events. This accounted for 64% of Lee County's total amateurs sports visitors in 2015.

Room Night Seasonality - Room nights for amateur sports events in Lee County peak from May through July, and then again in October and November. January through April tends to be weaker for amateur sports room nights.

Sports Tourism Seasonality - The peak season for baseball and softball events in Lee County is May through July. There is minimal event activity February through April, which may be somewhat due to limited access to facilities in the County where MLB clubs are holding spring training activities. Lee County averages less than one sports tourism-oriented soccer event per month. With the local popularity of soccer and increasing youth soccer participation nationwide, there could be opportunities for Lee County to host more soccer events if better tournament-caliber facilities were available. There were only 10 amateur sports tourism-focused basketball events held in Lee County in 2015. A lack of a large, indoor, multi-court facility for basketball tournaments may be the reason for minimal event activity and/or interest. Hockey (both ice and inline) featured 9 sports tourism events in 2015. Most events were held at Germain Arena.



LOCAL FACILITY INVENTORY

Facility Satisfaction Methodology - Via our community survey process, Victus Advisors gathered feedback from local sports participants regarding their satisfaction with the primary sports venues that are marketed by the County's Sports Development team. Results were evaluated using "Top-2 Box" combined scores ("7" + "6", representing the highest levels of satisfaction) and "Bottom-3 Box" ("3" + "2" + "1", representing the lowest satisfaction levels).

Satisfaction with Lee County Sports Facilities - The FGCU Tennis Facility received the highest satisfaction rating, with the Lee County/FGCU Aquatics Center and the CenturyLink Sports Complex/Hammond Stadium the second and third highest rated, respectively. It is also worth noting the Bayshore Soccer Complex and S.T.A.R.S. Complex received the worst ratings.

Observations/Comments for Select Lee County Sports Facilities -

Lee County/FGCU Aquatics Center - Although the facility was highly rated among local users, several local stakeholders noted that the outdoor aquatic center at FGCU did not materialize as all had hoped in terms of factors that could have made the facility more viable for larger regional/national swim meets (e.g. deck space, spectator seating capacity, shade structures, etc.).

CenturyLink Sports Complex - A softball tournament promoter feels that the complex is the best of all the softball facilities in Lee County.

jetBlue Park - Two survey respondents identified the need for permanent restrooms that were closer to the soccer fields.

Player Development Complex - Baseball tournament users stressed the need for field lights and parking lot lights at the complex. Additionally, the primary current user indicated that at least three additional baseball fields would enable them to expand the size of for their events. Another baseball tournament promoter would like to see up to 16 youth baseball/softball fields.

Kelly Road Soccer Complex - "Maintenance of the fields has been an issue. The fields tend to settle over time."

Summary of Select County-Operated Facilities - As shown below, the County-operated field inventory for baseball and soccer/multi-use is extremely fragmented, with no single site featuring more than 7 soccer or 6 baseball fields. In addition, the inventory of softball fields and basketball courts is both small and fragmented.

Facility	Number of County Operated Fields/Courts			
	Baseball Fields	Softball Fields	Soccer/Multi-Use Fields	Basketball Courts
Bayshore Soccer Complex	-	-	7	-
CenturyLink Sports Complex (1)	4	4	1	-
City of Palms Park	1	1	-	-
Estero Community Park	-	-	4	3
jetBlue Park (1)	6	-	6	-
Kelly Road Soccer Complex	-	-	6	-
Lehigh Community Park	3	1	2	-
North Ft. Myers Community Center	4	-	3	2
Player Development Complex	5	-	-	-
Rutenberg Park	3	-	1	-
Terry Park	4	-	1	-
Veterans Park Recreation Center	-	-	-	2
Wa-Ke Hatchee Community Center	-	-	-	2
TOTAL	30	6	31	9



COMPARATIVE FACILITIES – REGIONAL/NATIONAL



Overview: Victus Advisors analyzed existing sports facilities located in the comparative markets that were identified by the Sports Development team as primary competitors for amateur sports events:

- Foley Sports Complex/Sports Tourism Complex, Foley, Alabama
- LakePoint - Emerson, Georgia
- Rocky Top Sports World - Gatlinburg, Tennessee
- The Ripken Experience - Myrtle Beach, South Carolina
- The Ripken Experience - Pigeon Forge, Tennessee

In addition, we also reviewed ten (10) other sports recreation facilities located in Florida that were identified by the Sports Development team, local stakeholders, and survey respondents as competitive in-state venues and markets. Unless otherwise noted, the sources of information presented in this report were facility management:

- Delray Beach Tennis Center - Delray Beach
- Doyle Aquatic Center at The Long Center - Clearwater
- ESPN Wide World of Sports Complex - Orlando
- Frank Brown Park - Panama City Beach
- Nathan Benderson Park - Sarasota
- North Collier Regional Park - Naples
- Northeast Regional Park - Davenport
- Northwest Recreation Complex - Apopka
- Seminole County Sports Complex - Sanford
- The Premier Sports Campus - Lakewood Ranch

Summary:

Size and Configuration

The comparable facilities reviewed in this section range from five to 10 baseball/softball fields, up to 12 basketball courts (also convertible to volleyball courts) and up to 22 soccer/multi-use fields.

Tournaments & Visitors

The comparable facilities we analyzed are expected to host an average of 33 tournaments each year (excluding ESPN Wide World of Sports), and an average of 61,000 annual total visitors (excluding ESPN Wide World of Sports and LakePoint) per facility.



LOCAL INTERVIEW & FOCUS GROUP SUMMARY



Overview - In November 2016, Victus Advisors held in-person interviews in Lee County with sixteen (16) project stakeholders and focus groups with eighteen (18) sports community leaders. The topics covered included: perceptions of Lee County's current amateur sports facilities, perceptions of other cities and facilities that host amateur sports events around the State, and opinions regarding the state of various amateur sports in Lee County.

Lee County Facilities -

Baseball - Many interviewees feel there is a major need for lights at the Player Development Complex. Safety was a concern for many interviewees at both the Player Development Complex and at City of Palms Park.

Soccer - Most soccer groups agreed that there are not enough quality fields to meet demand, with the two largest soccer complexes (Bayshore and Kelly Road) receiving poor reviews.

Rugby - One rugby group uses the fields at Estero Community Center and finds it very challenging to find available multi-use field space in the County.

Swimming - A local swim club leader stated that they have a good facility for smaller meets, but feels that a covered roof or shade structures at FGCU Aquatic Center could bring larger events.

Fencing - A local fencing group is having trouble finding a good facility for training. Need to train at least six to seven days a week.

Football/Cheerleading - A local football/cheerleading interviewee cited the demand for access to an indoor fieldhouse in the event of weather issues and rain outs.

Water Sports - "To my knowledge there are no facilities for water sports. I don't know of any boat house in Lee County with all the water resource that we have."

Tennis - "We have courts right now that are so faded...and these are our tournament sites. It's gotten to the point where it's almost embarrassing to invite and offer out of area athletes to come here. It's looking tired, worn, and shabby."

Other Sports Destinations - Opinions varied on The Premier Sports Campus in Lakewood Ranch. One interviewee felt that the complex has no infrastructure and noted that the parking lots were muddy. Another interviewee liked the size of the complex suggesting they are able to meet demand. Several users noted that the Sarasota area has several facilities available, including Nathan Benderson Park for rowing events and Twin Lakes Park for baseball and other sports.

State of Amateur Sports in Lee County - Most interviewees suggested that baseball is perhaps the most successful sport in Lee County, and that the sports tourism demand for baseball (and softball) continues to grow. Other interviewees noted that soccer may actually be more popular than baseball locally, however tournament/event opportunities have lagged behind due to inadequate facilities. Many interviewees felt basketball is underserved in the County and cited a lack of tournament venues.



EVENT INTERVIEW SUMMARY



Overview - In November/December 2016, Victus Advisors held twenty-five (25) telephone interviews with sports event organizers and operators locally, regionally and nationally. The overall goal of these interviews was to understand event organizers past experience in hosting events in Lee County and identify which factors are most important in deciding whether or not to return in future years, including: perceptions of Lee County's current amateur sports facilities, local support for sports events in Lee County (County/Sports Development, hotels, etc.), and demand for new facilities in Lee County.

Lee County Facilities - One national event organizer mentioned that they would love to host more events in Lee County, but that there are no suitable pools. Furthermore getting access to the FGCU Aquatics Center is challenging. One softball event organizer recognized CenturyLink Sports Complex as one of the best facilities in the region for their events. One baseball user was very satisfied with all the fields in Lee County and feels they are just as good as any in the country. He suggested adding turf fields. One lacrosse event organizer recently used the Kelly Road Soccer Complex for a tournament and felt the field set-up was awkward and outdated. Additionally he was concerned that the local soccer club had the final say with logistics and that they didn't open concessions.

Local Support For Sports Events In Lee County - The majority of event organizers we interviewed spoke very highly of working with Lee County Sports Development to facilitate their events and lauded them for being great to work with. The following points were other recurring themes with event organizers in what they expected from groups such as Lee County Sports Development and Parks & Rec:

- A CVB that can connect organizers with local businesses and recommend hotels, restaurants, etc.
- Provide grants or financial assistance for first time events in Lee County
- Help with promoting and marketing event
- Aligned vision and collaboration with Sports Development, Parks & Recreation, and facilities
- Ease of access (airport, hotels, highway)
- Guaranteed dates at venues ahead of time

Demand for New Facilities - A few baseball event organizers suggested implementing more artificial turf fields and having more fields adaptable for both baseball and softball. Most lacrosse event organizers agree that a complex with an eight field minimum would be ideal. A volleyball event organizer feels that an indoor facility with a minimum of nine courts and a 30 foot ceiling would be ideal for an event. USA Swimming would be interested in hosting a sectional tournament once a year over a four day period with the right facility (at least a 50 meter pool with covered spectator seating for 1,500). Additional needs would be a warm-up pool and large enough deck space for 1,000 swimmers.



SURVEY RESULTS

Overview - In addition to meetings and interviews, in November 2016, Victus Advisors also conducted online surveys with 341 parents, participants, coaches, and other members of the amateur sports community in the Lee County area. Survey topics included: general demographic information, sports and recreation facilities frequented in the Lee County area, general attitudes toward amateur sports in Lee County, and ideal features of amateur sports host cities and facilities.

Survey Respondent Profile -

- 51% Male, 49% Female
- 93% between the ages of 25 and 64; 48% age 25 to 44, 45% age 45 to 64
- 86% White, 7% Hispanic, 3% Multiracial, 2% Black, 1% Asian
- Median Household Income: \$75,000 - \$100,000
- 85% live in a household with children under 18
- Median # of children in household: 2

Results -

- 73% of the respondents were parents of youth sports participants, and more than 30% were coaches or adult sports participants.
- JetBlue Park, Kelly Road Soccer Complex, and the Estero Community Park & Rec Center were cited as the venues most visited in the County.

Results (cont'd) -

- Soccer, Baseball, Swimming/Diving, and Basketball were the sports that survey respondents were most involved with in Lee County. There is a noticeable difference between the popularity of soccer in Lee County and the minimal amount of soccer sports tourism events held in the County.
- FGCU Tennis Facility received the highest satisfaction rating, with the FGCU Aquatics Center and the CenturyLink Sports Complex/Hammond Stadium the second and third highest rated, respectively. It is also worth noting the Bayshore Soccer Complex and S.T.A.R.S. Complex received the worst ratings.
- Baseball was identified as the sport that has been developed most successfully in Lee County.
- Soccer, Swimming / Diving, and Lacrosse were identified as the sports with most potential in Lee County. As participation and interest increases over time, more facilities will need to be available to meet demand.
- 89% of respondents have traveled outside of Lee County for amateur sports. Soccer and swim meets were the most mentioned sports travel events and Sarasota, Naples, and Orlando were the communities most visited.
- 58% of respondents cited “quality of sports facilities” as the primary reason in determining their favorite destinations for sports tourism.
- Overall, most respondents felt that the overall sports community and sports destination experience in Lee County were on par with other premier sports tourism destinations in Florida. However, nearly 60% of respondents felt that the overall “quality of sports facilities” in Lee County was lacking relative to competitive markets.



LEE COUNTY SPORTS MARKET OPPORTUNITIES & FACILITY EXPANSION RECOMMENDATIONS



Key Strengths of the Lee County Sports Tourism Market - 1) As shown in Section 3 of this report, Lee County's current strength is in hosting baseball events, most of which are occurring during the summer months. 2) Most local stakeholders and event interviewees spoke very highly of the Lee County Sports Development team, and felt that they were among the best to work with in the nation. 3) Lee County's policy of minimal facility rent charged to sports tourism events, as well as relatively affordable lodging rates in the summer months, also make the County a more desirable sports tourism destination for outdoor sports.

Potential Weaknesses of the Lee County Sports Tourism Market -

1) Although current baseball activity is very strong, demand continues to grow for baseball events of all ages, and it could benefit the County to diversify beyond its current strengths in teen and adult baseball to focus additionally on youth baseball and girls softball. 2) Baseball/softball fields are relatively fragmented throughout the County, with no single complex that can accommodate 8+ fields for tournament use. 3) There appears to be significantly unmet facility demand for soccer and other field sports, with no multi-use field complex with 8+ fields and low ratings from local users regarding the quality of soccer fields. 4) There is significant seasonality in the County's amateur sports tourism schedule, with December through April showing the lowest activity levels. A key factor in terms of missed sports tourism opportunities in the winter and early spring is the lack of indoor, tournament-caliber facilities in the County (basketball, volleyball, swimming, etc.)

Priority #1: Baseball/Softball Fields -

Recommendation: Lee County should light the existing five (5) fields, plus add three (3) more lit fields, at the Player Development Complex. They should also add another eight (8) lit fields for use by girls softball/youth baseball.

Rationale: Baseball field inventory is fragmented across the County, with no single facility able to provide 8+ fields in one location. Lee County should also seek to diversify its mix of baseball and softball events to cover a wider variety of events and age groups.

Priority #2: Multi-Use Field Complex -

Recommendation: Lee County should consider the development of a complex that includes at least eight (8) tournament-caliber, lighted, multi-use fields. The primary demand for these fields would be soccer, as well as other field sports such as lacrosse.

Rationale: Soccer is the most popular local sport in Lee County by participation, however both the inventory and quality of soccer fields in the County is significantly lacking.

Priority #3: Indoor Sports Opportunities -

Recommendation: Lee County should consider the long-term development of an indoor, tournament-caliber sports facility to balance the seasonality of the County's sports tourism calendar.

Rationale: Victus Advisors found that indoor, multi-court facilities are significantly lacking in the County.



ECONOMIC & FISCAL IMPACT ANALYSIS



ECONOMIC & FISCAL IMPACT ANALYSIS

The annual operations of expanded outdoor sports facilities (baseball, softball, and soccer/multi-use fields) in Lee County are estimated to generate significant incremental direct spending within the County by outside visitors. Over the course of the estimated useful life of a sports facility (30 years), it has been estimated that the cumulative incremental economic/fiscal benefits within the County could include over \$2.3 billion in total economic output, 653 sustainable annual jobs, over \$968 million in wages, nearly \$23 million in County TDT revenues, and upwards of two million total hotel nights, as shown below:

Summary of Estimated Total Impacts Over 30 Years Lee County Sports Tourism Field Expansion (1)

	Cumulative Total	Net Present Value (2)
Room Nights:	2,041,200	n/a
County TDT Revenue:	\$22,774,827	\$10,492,993
Total Economic Output:	\$2,306,421,933	\$1,062,632,388
Annual Employment:	653	n/a
Labor Income:	\$968,212,782	\$446,082,412

Note: (1) Assumes 11 new baseball and softball fields, and 8 new soccer/multi-use fields

(2) Our 30-year financial model assumes 3% inflation and 5% discount rate (based upon recent borrowing rates via County's 2015 CAFR)



SECTION 1 INTRODUCTION



PROJECT BACKGROUND



Victus Advisors, along with our project partner **Clancy's Sports Properties**, was engaged by **Lee County Sports Development** in 2016 to conduct an independent analysis of the County's sports tourism venues and sports marketing opportunities. We assessed both the local sports community in Lee County and the relevant regional/national sports tourism markets to identify opportunities and recommend upgraded or new facilities for increasing Lee County's market potential for youth and amateur sports tourism.

Our primary project goals for this study included:

- Engaging local sports community stakeholders and sports facility user groups to assess the strengths and weaknesses of the local Lee County sports market
- Assessing the strengths and weaknesses of Lee County as a regional/national sports tourism destination
- Identifying and recommending potential improvements to Lee County's current facility and venue inventory
- Recommending the type and location for sports venue development in Lee County
- Estimating the potential economic and fiscal impacts of sports venue development



STUDY METHODOLOGY

PHASES

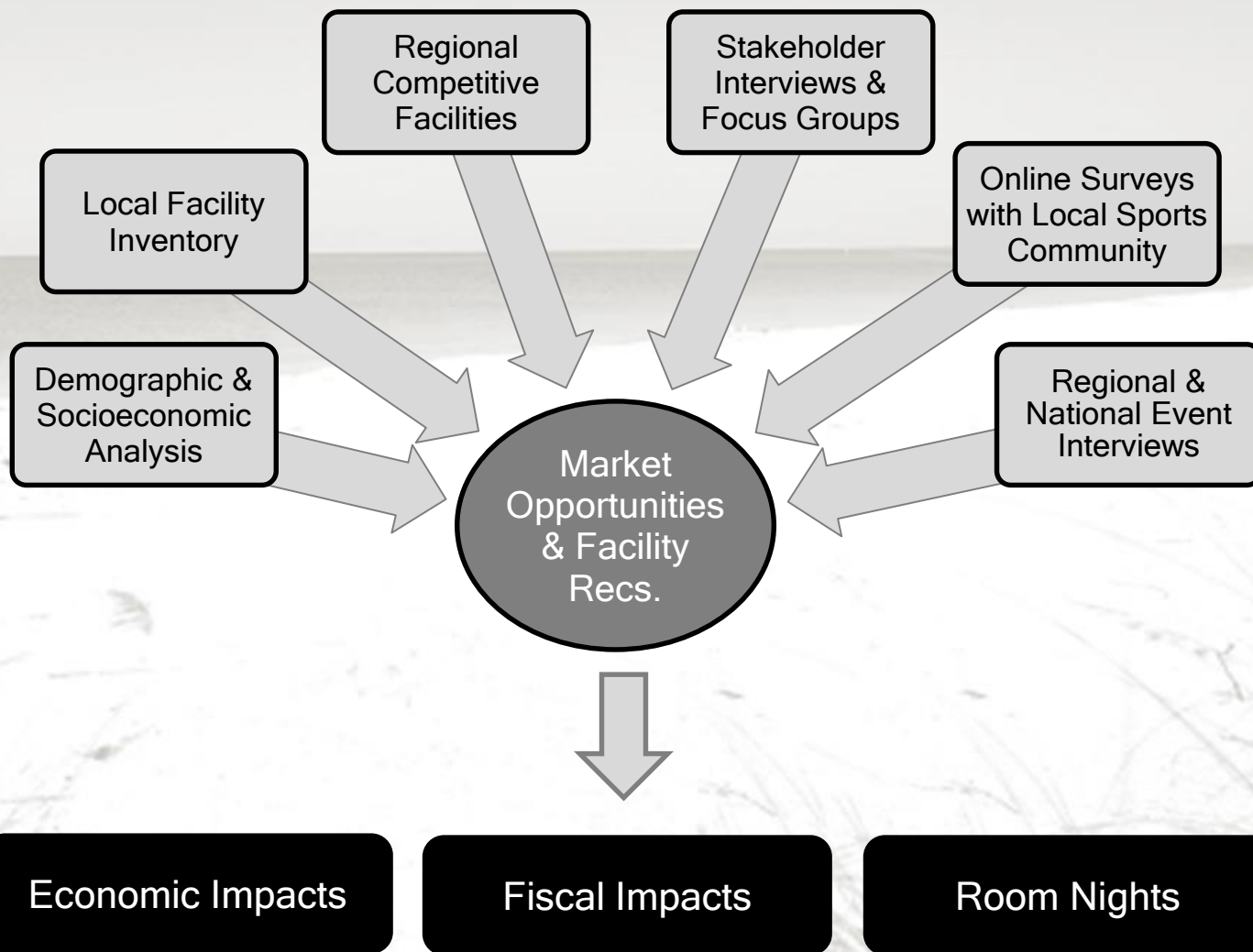
**1. SPORTS
TOURISM MARKET
& FACILITY ANALYSIS**



**2. OPPORTUNITIES &
RECOMMENDATIONS**



**3. ECONOMIC &
FISCAL IMPACT
ESTIMATES**





SECTION 2 DEMOGRAPHIC & SOCIOECONOMIC ANALYSIS



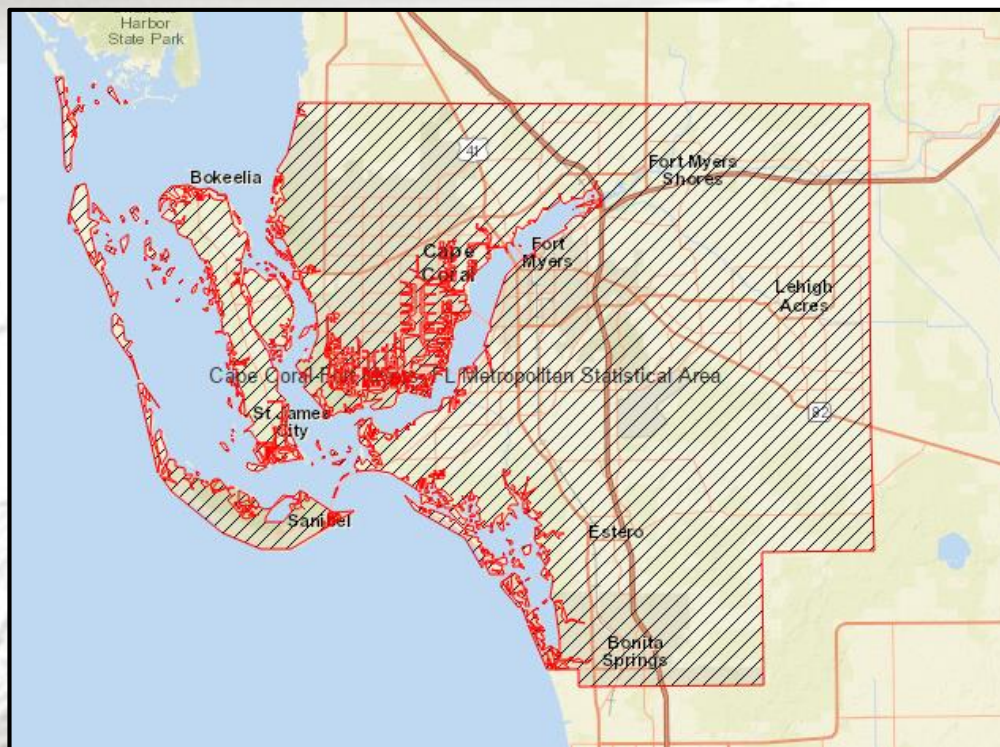
METROPOLITAN STATISTICAL AREA (MSA)

Metro.
Statistical
Areas

- MSA's are defined by U.S. Office of Management & Budget.
- Adjacent counties with high degree of social/economic integration with urban core of 50,000 people or more.

Lee
County
MSA

- Geographically defined as Lee County.
- Cape Coral-Fort Myers MSA ("Lee County MSA" for the remainder of this report) has a population of more than 680,000 people.



Source: Esri



POPULATION DATA - AGE

	Lee County MSA	United States
Population	685,683	323,580,626
Population Under 18	124,970	73,485,783
Percentage of Population Under 18	18.2%	23.2%
Median Age	47.4	38.0

Source: Esri

Compared to the national average, Lee County has an older median age and a smaller share of the population that is under 18 years of age. Lee County age statistics reflect a smaller share of working age population and young families primarily due to the County's status as a popular retirement destination.



POPULATION DATA - AGE TRENDS

LEE COUNTY MSA			
Year	2000	2016	2021
Population	440,888	685,683	760,921
Population Under 18	86,388	124,970	136,809
Percentage of Population Under 18	19.6%	18.2%	18.0%
Median Age	45.2	47.4	48.2

Sources: Esri, Census.gov, state.fl.us

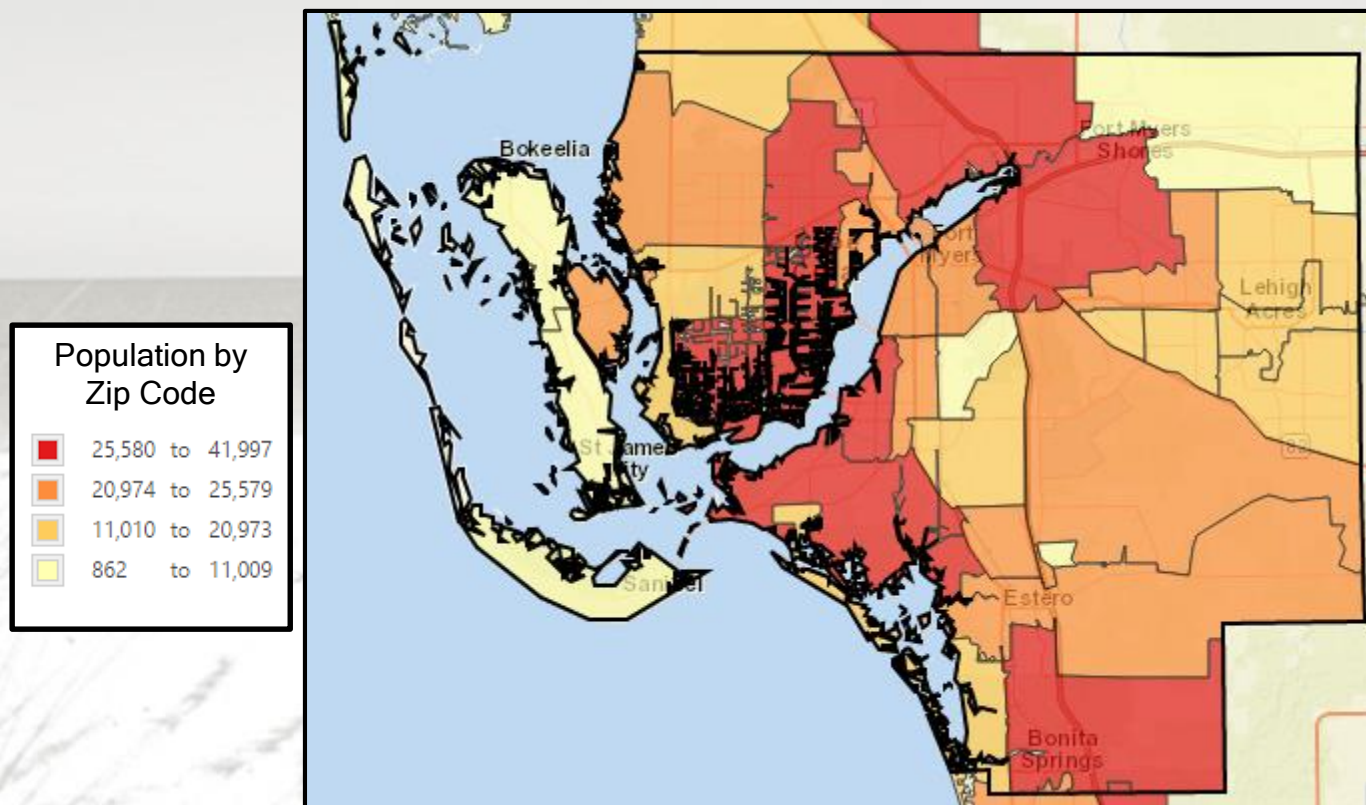
Despite Lee County's smaller share of under-18 population relative to the national average, it should be noted that the total number of children living in the County has increased by nearly 45% since 2000, indicating a rapidly growing market for youth sports participation. Over the next five years, the County's population is expected to continue growing by more than 2% annually, as shown below.

LEE COUNTY MSA			
Year	2000	2016	2021
Population Growth:			
Annual Pop. Growth (2000 to 2016)		2.8%	
Annual Pop. Growth (5-year Projection)			2.1%

Source: Esri



POPULATION DISTRIBUTION

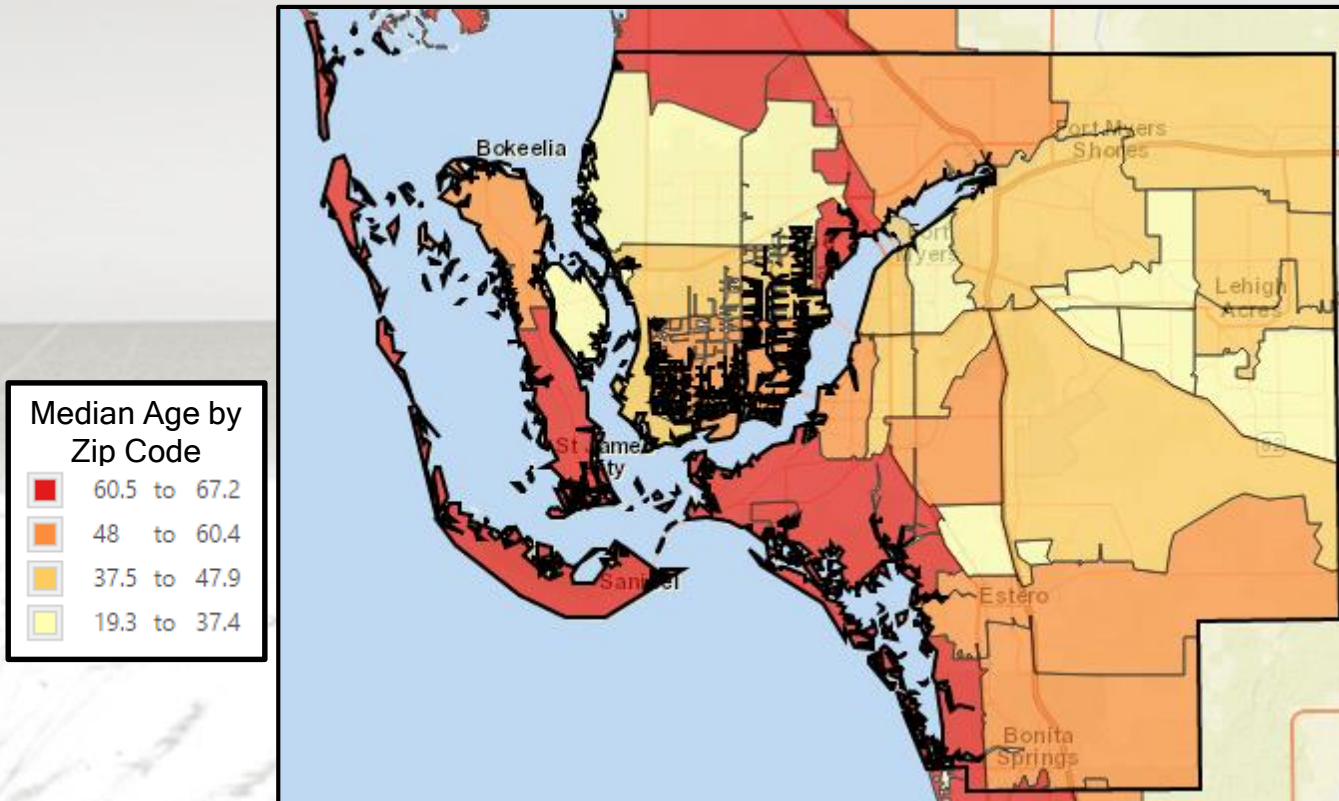


Source: Esri

The Lee County MSA's population is clustered in the Fort Myers, Cape Coral, and Bonita Springs areas. There are relatively few residents northwest of Fort Myers.



AGE DISTRIBUTION



Source: Esri

A lower median age of a population tends to be a positive market indicator for sports venues due to the presence of a large working age population and young families.

In Lee County, older age groups (retirees) tend to be clustered in the beach communities, with younger median ages around Fort Myers, northwest Cape Coral, and Lehigh Acres.



HOUSEHOLD DATA - CHILDREN & INCOME

	Lee County MSA	United States
Total Households	285,576	121,784,504
Households With Children Under 18	186,491	80,307,260
Percentage of Households With Children	65.3%	65.9%

Source: Esri

	Lee County MSA	United States
Median Household Income	\$50,542	\$54,149
Adjusted Median Household Income ⁽¹⁾	\$52,979	\$54,149

Source: Esri

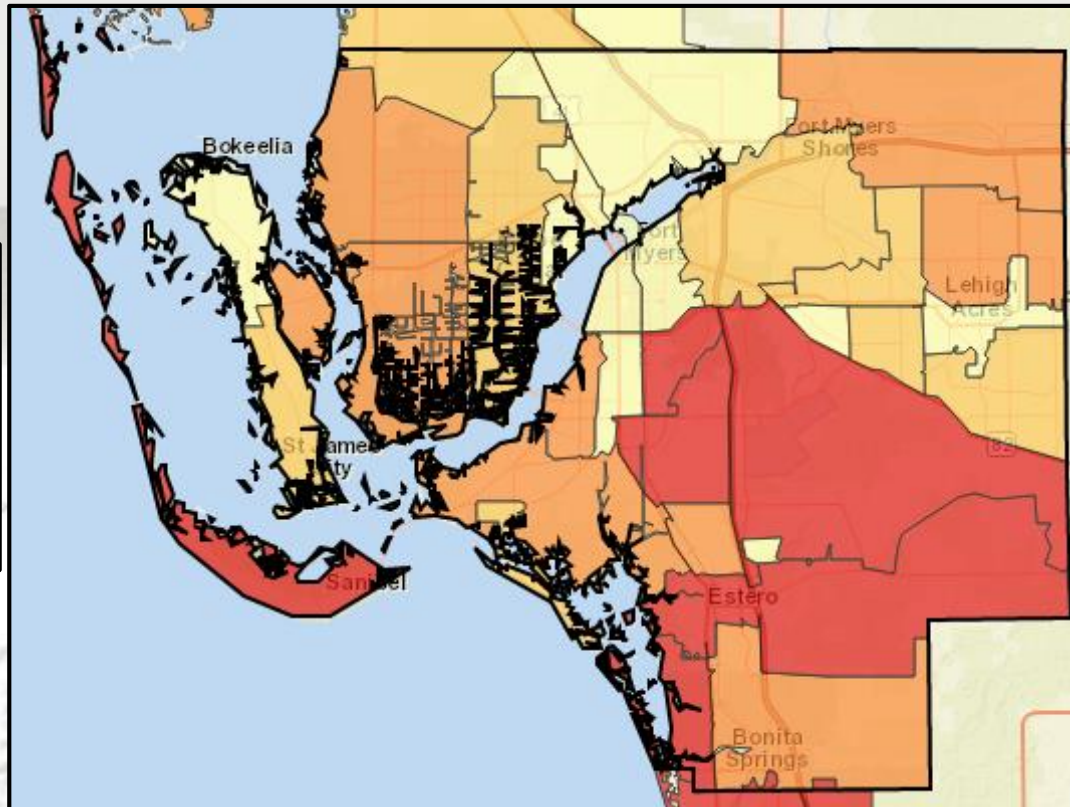
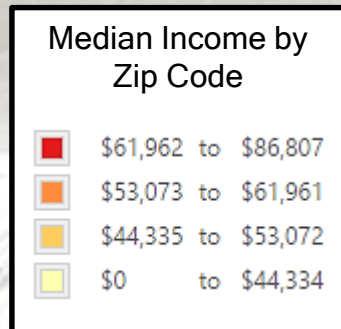
Note: (1) Adjusted for cost of living, according to ACCRA Cost of Living Index and city-data.com

Lee County is about the same as the U.S. average in terms of the percentage of households with children, which is a positive indicator for youth sports demand, especially for a community with a significant retiree population.

The median household income in Lee County is slightly less than the U.S. average. This may be related to an older, often retirement-aged population that is no longer party of the workforce. Higher household income levels can often indicate an ability for a household to spend disposable income on both adult recreation and youth sports.



INCOME DISTRIBUTION



Source: Esri

Median Household income levels within the MSA tend to be higher in the Estero area, and lower in Fort Myers.



REGIONAL DRIVE TIME ZONE

MSA's with 100k + population Within a 2.5 -hour Drive

Miami MSA
pop. 5,900,856

Tampa MSA
2,966,391

Bradenton-Sarasota MSA
759,083

Lakeland MSA
642,909

Naples MSA
354,203

Punta Gorda MSA
173,357

Sebring MSA
100,744

Several Florida cities
with large populations
are within a 2.5 hour
drive, which is ideal for
regional tournaments.



Source: Esri

MSA's with 100k + population Within a 5-hour Drive

Orlando MSA
pop. 2,371,879

Jacksonville MSA
1,448,558

Daytona Beach MSA
628,038

Palm Bay MSA
568,673

Port St. Lucie MSA
448,817

Ocala MSA
344,417

Gainesville MSA
272,839

Vero Beach MSA
146,613

Homosassa Springs MSA
143,042

The Villages MSA
119,869



COMPARATIVE MARKETS - SELECTION CRITERIA



Based upon feedback from the Sports Development team regarding the markets that they most often compete against for amateur sports events, as well as feedback gathered from local focus groups and online surveys regarding Lee County residents' frequent sports tourism destinations, Victus Advisors compared Lee County's demographic and socioeconomic characteristics to the following competitive set:

Florida

- Tampa-St. Petersburg-Clearwater MSA
- North Port-Bradenton-Sarasota MSA
- Seminole County (Orlando-Kissimmee-Sanford MSA)
- Polk County (Lakeland-Winter Haven MSA)
- Palm Beach County (Miami-Ft. Lauderdale-Pompano Beach MSA)
- Panama City Beach (Panama City MSA)

Out of State

- Myrtle Beach, South Carolina (Myrtle Beach-Conway-North Myrtle Beach MSA)
- Gatlinburg, Tennessee (Sevierville Micro SA)
- Pigeon Forge, Tennessee (Sevierville Micro SA)
- Emerson, Georgia (Bartow County)
- Foley, Alabama (Daphne-Fairhope-Foley Micro SA)



COMPARATIVE MARKETS - POPULATION

<u>City/County, State</u>	<u>MSA/County</u>	MSA Population
Palm Beach County, FL	Miami-Ft. Lauderdale-Pompano Beach	5,900,856
Tampa, St. Petersburg, & Clearwater, FL	Tampa-St. Petersburg-Clearwater	2,966,391
Seminole County, FL	Orlando-Kissimmee-Sanford	2,371,879
North Port, Sarasota & Bradenton, FL	North Port-Sarasota-Bradenton	759,083
Lee County, FL	Lee County	685,683
Polk County, FL	Lakeland-Winter Haven	642,909
Myrtle Beach, SC	Myrtle Beach-Conway-North Myrtle Beach	436,473
Foley, AL	Daphne-Fairhope-Foley	207,645
Panama City Beach, FL	Panama City	191,107
Emerson, GA	Bartow County	103,109
Gatlinburg & Pigeon Forge, TN	Sevierville	96,735
Average		1,305,625
Median		642,909

Source: Esri

Note: Sorted by MSA Population in descending order

The Lee County MSA's population of 685,683 represents the fifth most populated out of the 11 competitive markets selected for comparative analysis.



COMPARATIVE MARKETS - GROWTH

City/County, State	MSA/County	Annualized Pop. Growth (2000-2016)	Proj. Annual Pop. Growth (2016-2021)
Myrtle Beach, SC	Myrtle Beach-Conway-North Myrtle Beach	3.1%	2.5%
Foley, AL	Daphne-Fairhope-Foley	2.5%	2.2%
Lee County, FL	Lee County	2.8%	2.1%
Seminole County, FL	Orlando-Kissimmee-Sanford	2.3%	1.8%
North Port, Sarasota & Bradenton, FL	North Port-Sarasota-Bradenton	1.6%	1.5%
Gatlinburg & Pigeon Forge, TN	Sevierville	1.9%	1.3%
Tampa, St. Petersburg, & Clearwater, FL	Tampa-St. Petersburg-Clearwater	1.3%	1.2%
Palm Beach County, FL	Miami-Ft. Lauderdale-Pompano Beach	1.0%	1.2%
Polk County, FL	Lakeland-Winter Haven	1.8%	1.2%
Panama City Beach, FL	Panama City	1.1%	1.0%
Emerson, GA	Bartow County	1.9%	1.0%
Average		1.9%	1.6%
Median		1.9%	1.3%

Source: Esri

Note: Sorted by Projected Annual Population Growth in descending order

The projected growth rate of the Lee County MSA is well above the average and median among comparative markets.



COMPARATIVE MARKETS - MEDIAN AGE

<u>City/County, State</u>	<u>MSA/County</u>	MSA Median Age
Seminole County, FL	Orlando-Kissimmee-Sanford	37.0
Emerson, GA	Bartow County	37.4
Panama City Beach, FL	Panama City	40.5
Palm Beach County, FL	Miami-Ft. Lauderdale-Pompano Beach	40.8
Polk County, FL	Lakeland-Winter Haven	41.0
Foley, AL	Daphne-Fairhope-Foley	42.4
Gatlinburg & Pigeon Forge, TN	Sevierville	42.4
Tampa, St. Petersburg, & Clearwater, FL	Tampa-St. Petersburg-Clearwater	42.4
Myrtle Beach, SC	Myrtle Beach-Conway-North Myrtle Beach	44.4
Lee County, FL	Lee County	47.4
North Port, Sarasota & Bradenton, FL	North Port-Sarasota-Bradenton	51.6
Average		42.5
Median		42.4

Source: Esri

Note: Sorted by MSA Median Age in ascending order

The Lee County MSA's median age of 47.4 is above both the average and median among comparative markets, which reflects the market's status as a popular retirement destination.



COMPARATIVE MARKETS - YOUTH

City/County, State	MSA/County	Total Households	Households w/ Children Under 18	% of Households w/ Children
Emerson, GA	Bartow County	36,369	26,752	74%
Gatlinburg & Pigeon Forge, TN	Sevierville	37,873	26,499	70%
Polk County, FL	Lakeland-Winter Haven	240,057	166,952	70%
Foley, AL	Daphne-Fairhope-Foley	83,538	57,864	69%
Seminole County, FL	Orlando-Kissimmee-Sanford	873,012	582,165	67%
Lee County, FL	Lee County	285,576	186,491	65%
Palm Beach County, FL	Miami-Ft. Lauderdale-Pompano Beach	2,205,582	1,437,689	65%
Myrtle Beach, SC	Myrtle Beach-Conway-North Myrtle Beach	183,028	119,158	65%
Panama City Beach, FL	Panama City	76,291	49,214	65%
North Port, Sarasota & Bradenton, FL	North Port-Sarasota-Bradenton	334,013	207,525	62%
Tampa, St. Petersburg, & Clearwater, FL	Tampa-St. Petersburg-Clearwater	1,208,332	745,217	62%
Average		505,788	327,775	67%
Median		240,057	166,952	65%

Source: Esri

Note: Sorted by % of Households w/ Children in descending order

Despite Lee County's status as a popular retirement destination, and subsequent older median age, the County is close to the median among 11 comparative markets in terms of the percentage of households in the market that have children under 18, a positive sign for present and future youth sports and family recreation demand.



COMPARATIVE MARKETS - CORPORATE BASE

<u>City/County, State</u>	<u>MSA/County</u>	Corporate Base ⁽¹⁾
Palm Beach County, FL	Miami-Ft. Lauderdale-Pompano Beach	4,987
Tampa, St. Petersburg, & Clearwater, FL	Tampa-St. Petersburg-Clearwater	2,227
Seminole County, FL	Orlando-Kissimmee-Sanford	1,689
North Port, Sarasota & Bradenton, FL	North Port-Sarasota-Bradenton	573
Lee County, FL	Lee County	428
Polk County, FL	Lakeland-Winter Haven	297
Myrtle Beach, SC	Myrtle Beach-Conway-North Myrtle Beach	210
Panama City Beach, FL	Panama City	124
Foley, AL	Daphne-Fairhope-Foley	115
Gatlinburg & Pigeon Forge, TN	Sevierville	63
Emerson, GA	Bartow County	41
Average		978
Median		297

Source: Hoovers

Note: Sorted by Corporate Base in descending order

(1) Defined as HQs and branch locations with at least 5 employees and \$1M+ annual sales.

Among comparative markets, the Lee County MSA has the fifth largest corporate base, which can be a sign of overall economic health and is an indicator for potential corporate sponsorship/advertising support of sports tourism facilities and tournaments/events.



COMPARATIVE MARKETS - HOUSEHOLD INCOME

City/County, State	MSA/County	Median Household Income	Adj. Median Household Income ⁽¹⁾
Foley, AL	Daphne-Fairhope-Foley	\$51,327	\$55,250
Seminole County, FL	Orlando-Kissimmee-Sanford	\$50,559	\$53,958
Panama City Beach, FL	Panama City	\$46,527	\$53,052
Lee County, FL	Lee County	\$50,542	\$52,979
Gatlinburg & Pigeon Forge, TN	Sevierville	\$43,066	\$52,075
Tampa, St. Petersburg, & Clearwater, FL	Tampa-St. Petersburg-Clearwater	\$47,870	\$51,920
Emerson, GA	Bartow County	\$48,830	\$50,340
North Port, Sarasota & Bradenton, FL	North Port-Sarasota-Bradenton	\$50,201	\$48,786
Polk County, FL	Lakeland-Winter Haven	\$43,856	\$47,566
Myrtle Beach, SC	Myrtle Beach-Conway-North Myrtle Beach	\$44,090	\$46,805
Palm Beach County, FL	Miami-Ft. Lauderdale-Pompano Beach	\$49,948	\$45,950
Average		\$47,892	\$50,789
Median		\$48,830	\$51,920

Sources: Esri, ACCRA, and city-data.com

Note: Sorted by Adjusted Median Household Income in descending order

(1) Adjusted for cost of living

The Lee County MSA ranks fourth out of the 11 comparative markets in terms of cost-of-living adjusted median household income, which can be a potential indicator of household income available for spending on sports, recreation, and leisure.



SECTION 3 RECENT LEE COUNTY SPORTS TOURISM TRENDS



LEE COUNTY SPORTS TOURISM OVERVIEW

	<u>2013</u>	<u>2014</u>	<u>2015</u>
Total Number of Events	105	113	115
Total Amateur Sports Visitors	136,559	158,194	148,073
Total Room Nights	141,974	159,530	152,400
Total Economic Impact (1)	\$96,884,076	\$105,403,477	\$102,647,790
Avg. Room Nights/Event	1,352	1,412	1,325
Avg. Economic Impact/Event (1)	\$922,705	\$932,774	\$892,589

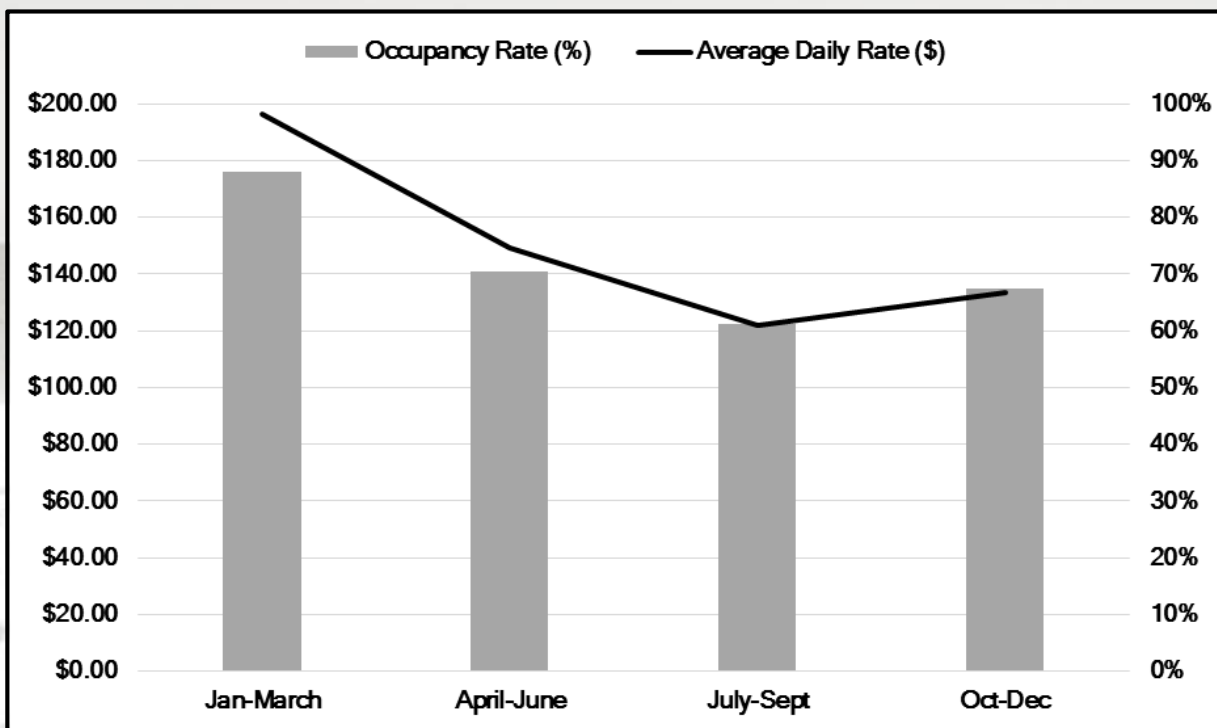
Source: Lee County Sports Development

Note: (1) Includes both direct and indirect economic impact

In recent years, it has been estimated that amateur sports tourism in Lee County has generated as much as 160,000 annual room nights and more than \$105 million in annual economic impact (2014).



LEE COUNTY 2015 HOTEL DATA



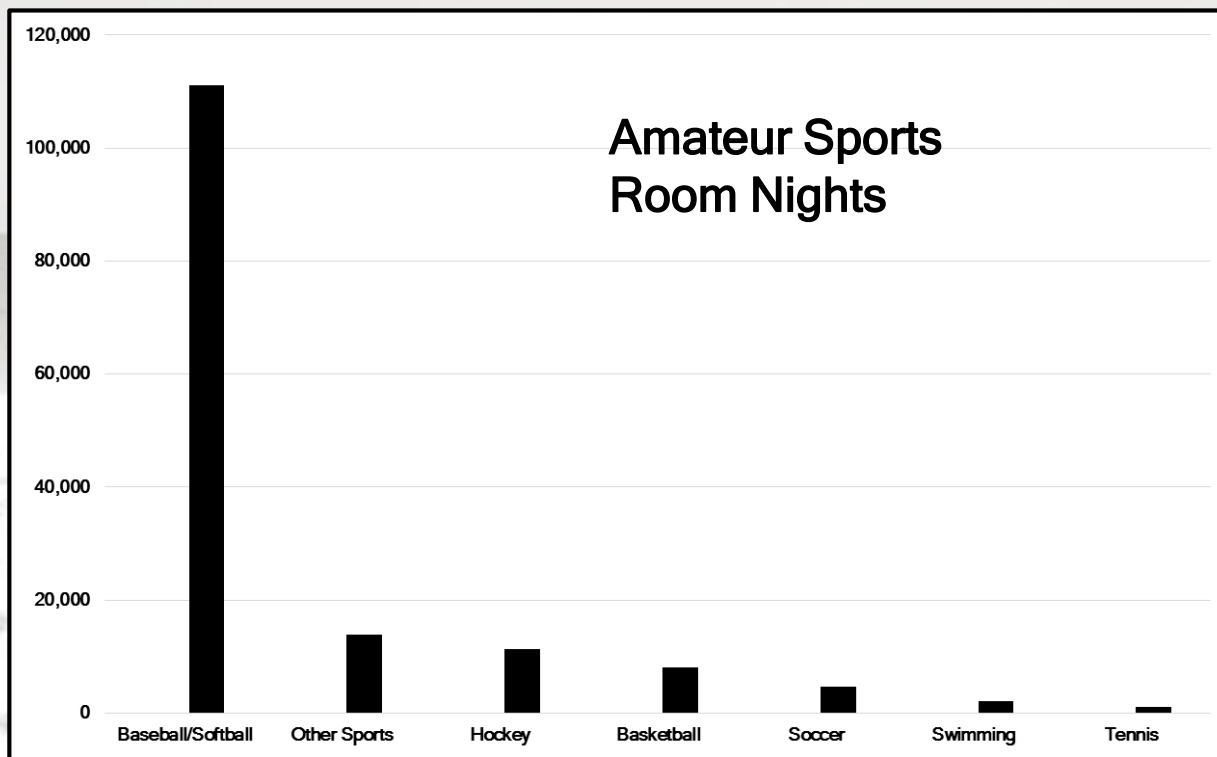
Sources: Lee County, Davidson-Peterson Associates

County-wide, total hotel occupancy and average daily rates were at their lowest during the summer months in Lee County in 2015. This trend presents an opportunity for Lee County Sports Development as most outdoor youth sports tourism occurs during the summer months, and sports families on budgets could be more willing to travel to Lee County due to its relatively affordable rates during that season.



2015 ESTIMATED ROOM NIGHTS BY SPORT

Amateur Sports Room Nights



Source: Lee County Sports Development

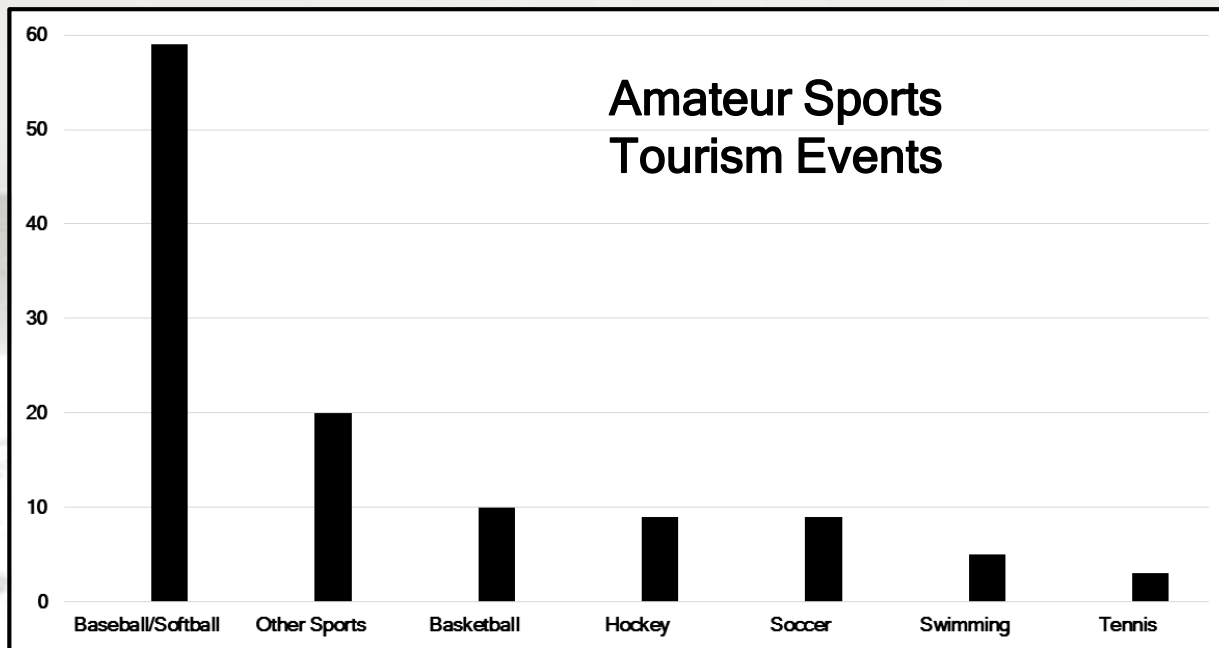
Note: Sorted by Room Nights in descending order

Amateur baseball and softball visitors booked more than an estimated 111,000 room nights in Lee County in 2015. This accounted for 73% of total room nights booked in Lee County for sports tourism in 2015.



2015 EVENTS BY SPORT

Amateur
Sports
Events



Source: Lee County Sports Development

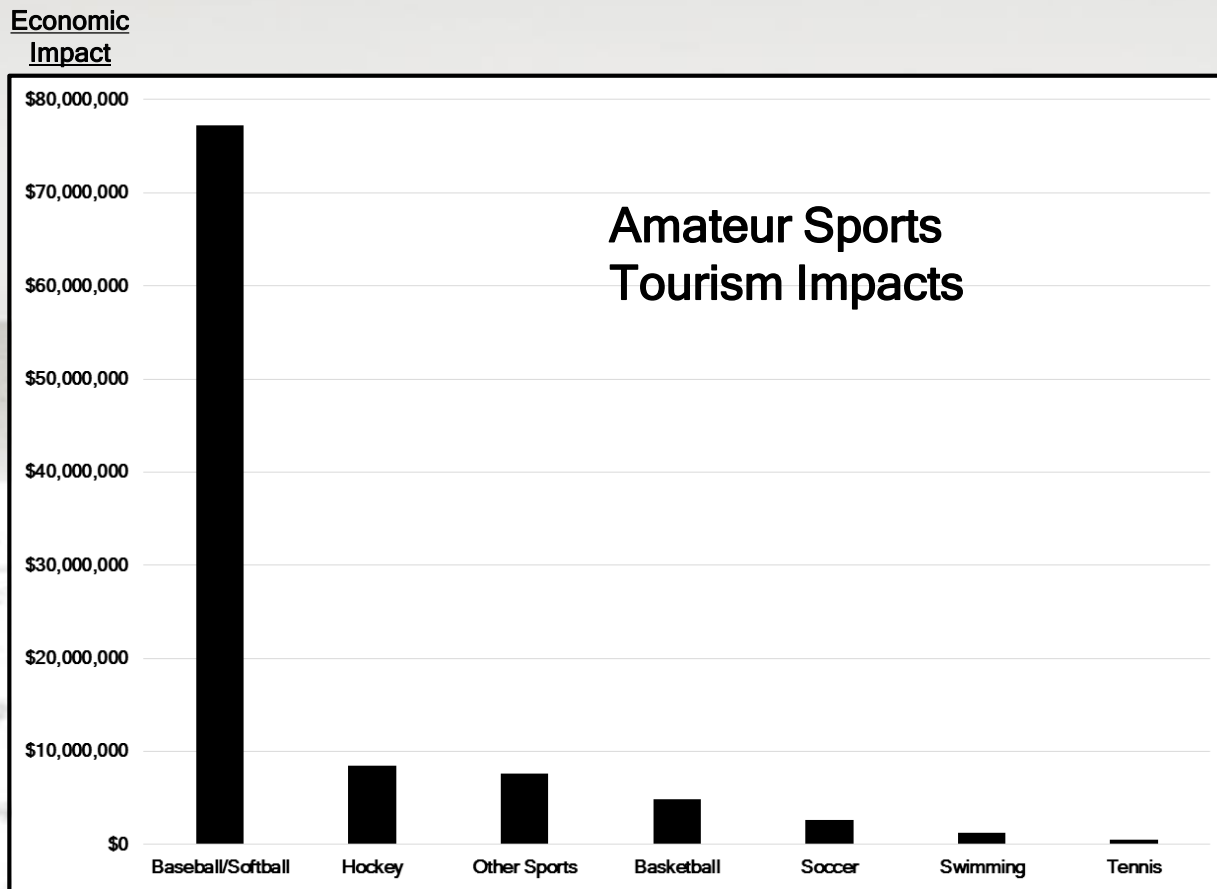
Note: (1) Sorted by Amateur Sports Events in descending order

(2) Other Sports includes: gymnastics, rugby, volleyball, etc.

Baseball and softball events accounted for over 50% of Lee County's amateur sports tourism events for 2015.



2015 ESTIMATED TOTAL ECONOMIC IMPACT



Source: Lee County Sports Development

Note: (1) Sorted by Economic Impact in descending order

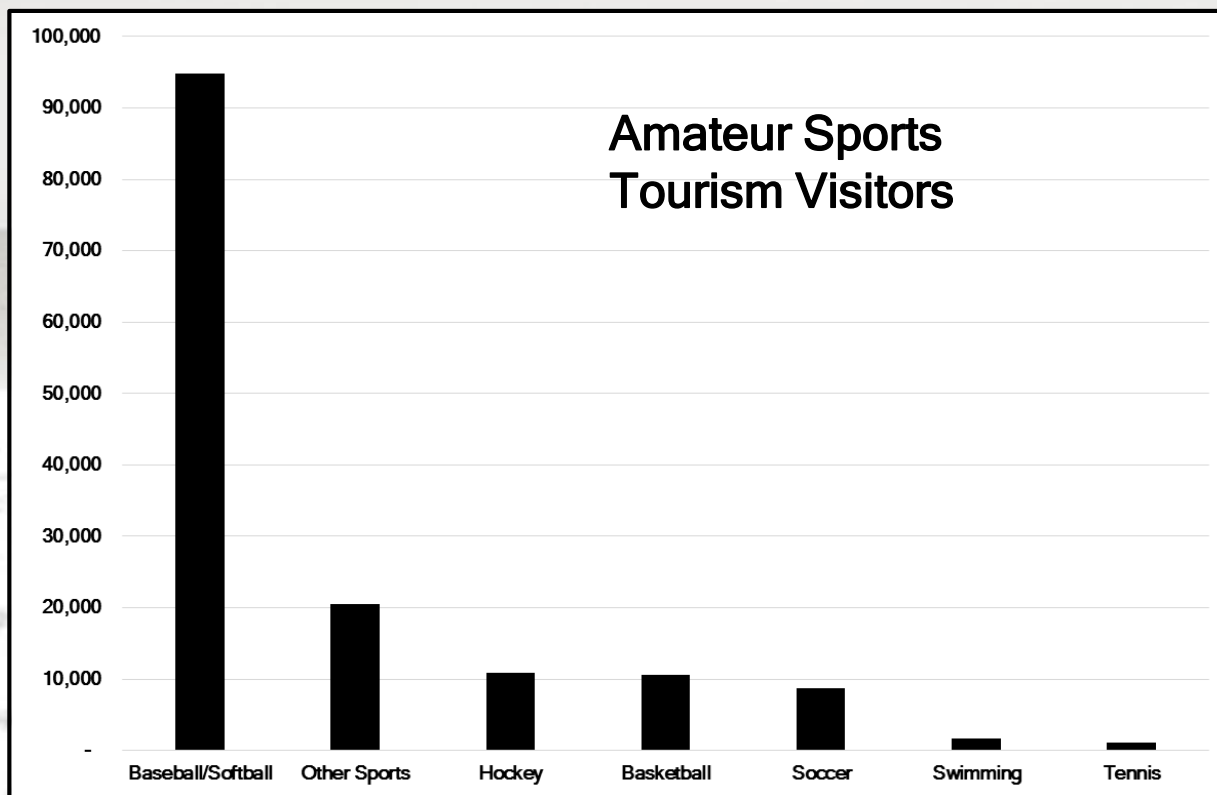
(2) Includes both direct and indirect economic impact

Baseball and softball events had an estimated total economic impact of just over \$77 million. This accounted for 75% of Lee County's overall amateur sports tourism economic impact in 2015.



2015 ESTIMATED AMATEUR SPORTS VISITORS

Amateur
Sports
Visitors



Source: Lee County Sports Development

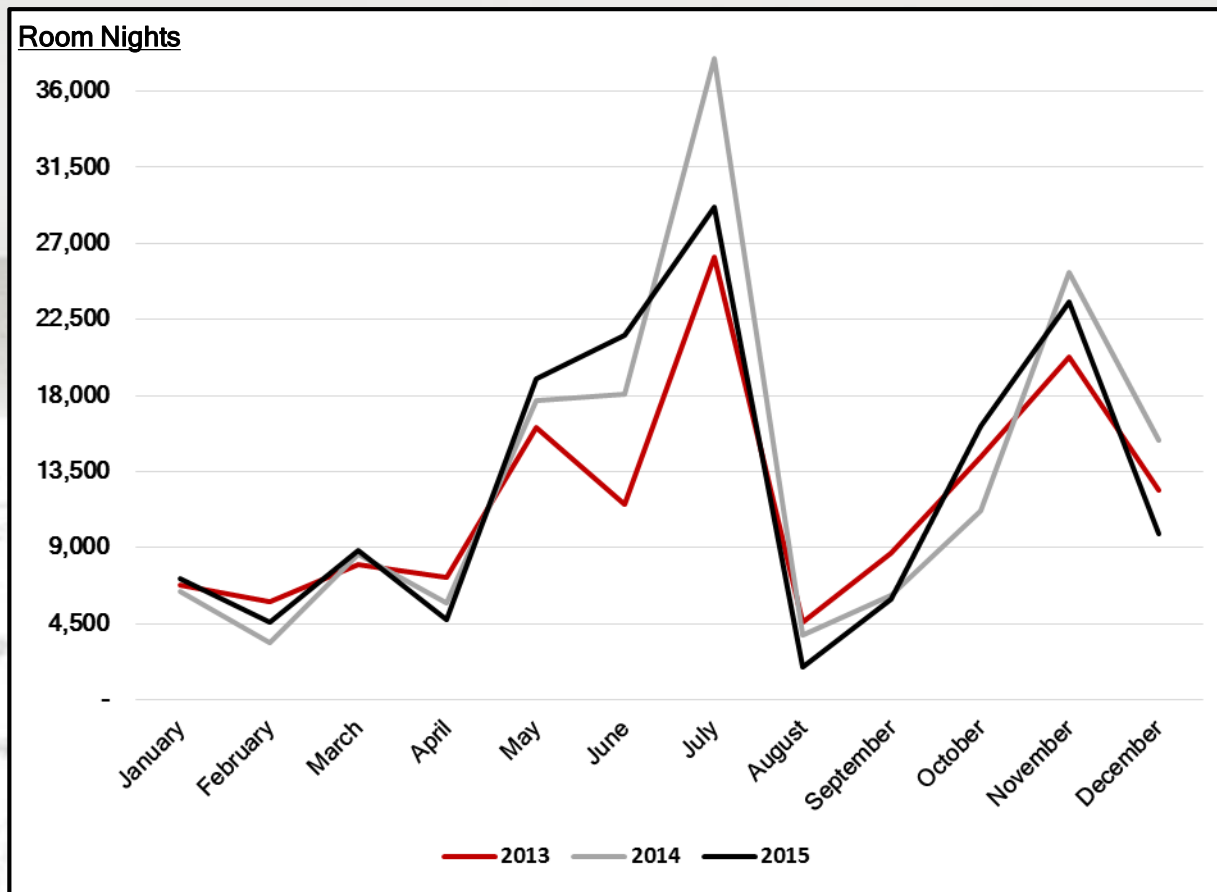
Note: (1) Sorted by Amateur Sports Visitors in descending order

(2) Amateur Sports Visitors includes event participants and spectators

Just under 95,000 total amateur sports visitors traveled to Lee County for baseball or softball events. This accounted for 64% of Lee County's total amateurs sports visitors in 2015.



AMATEUR SPORTS ROOM NIGHT SEASONALITY

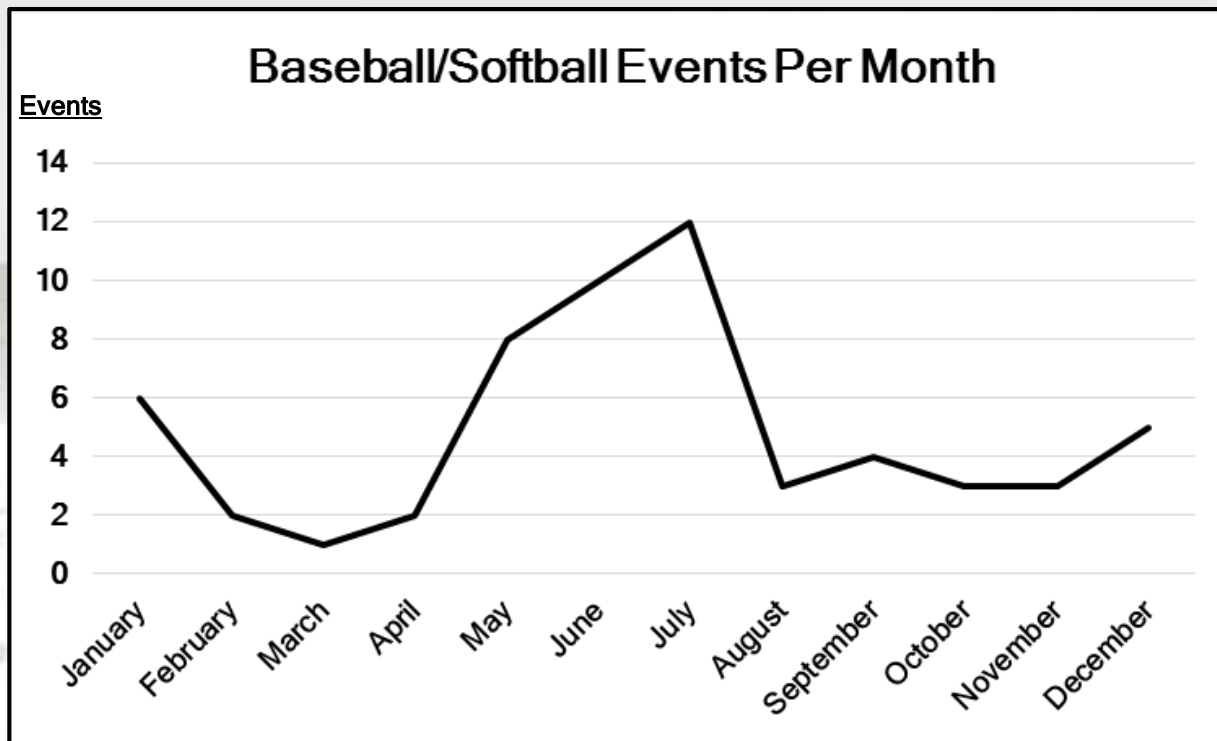


Source: Lee County Sports Development

Room nights for amateur sports events in Lee County peak from May through July, and then again in October and November. January through April tends to be weaker for amateur sports room nights.



2015 BASEBALL/SOFTBALL SEASONALITY

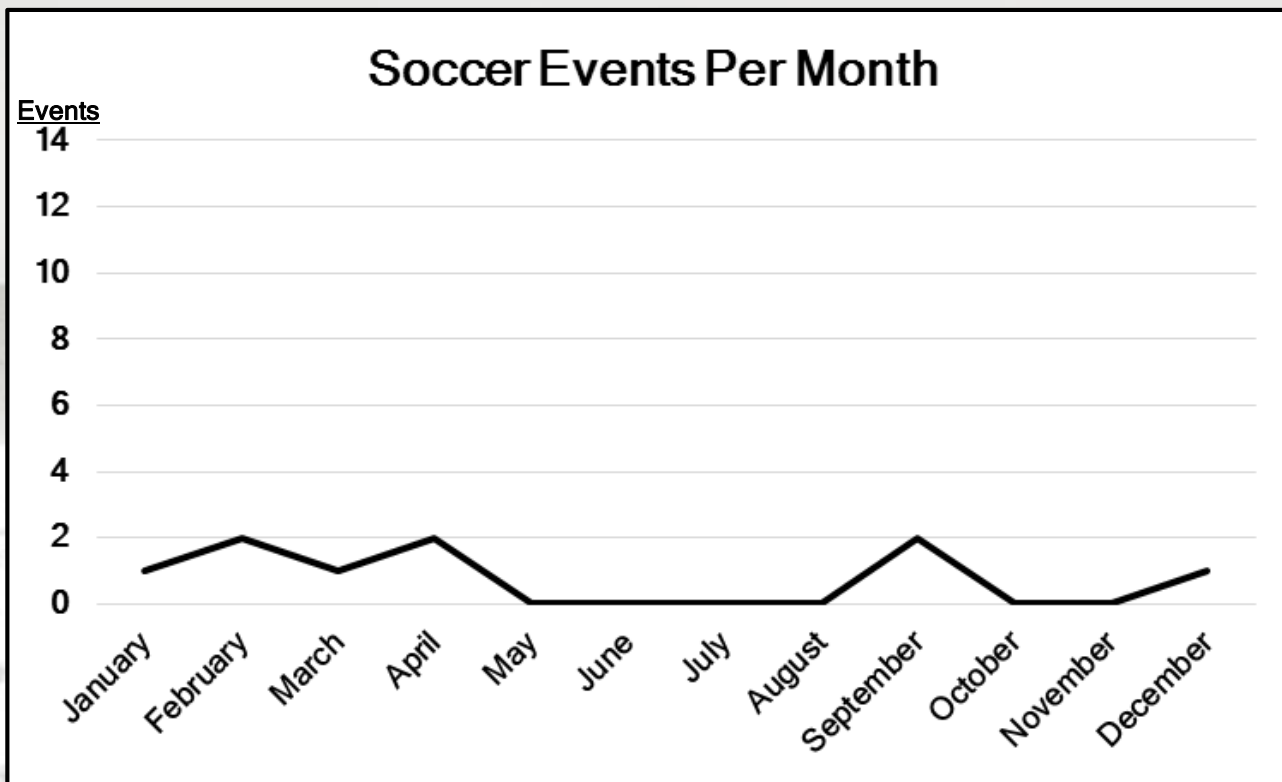


Source: Lee County Sports Development

The peak season for baseball and softball sports tourism in Lee County is May through July. There is minimal event activity February through April, which may be somewhat due to limited access to facilities in the County where MLB clubs are holding spring training activities.



2015 SOCCER SEASONALITY

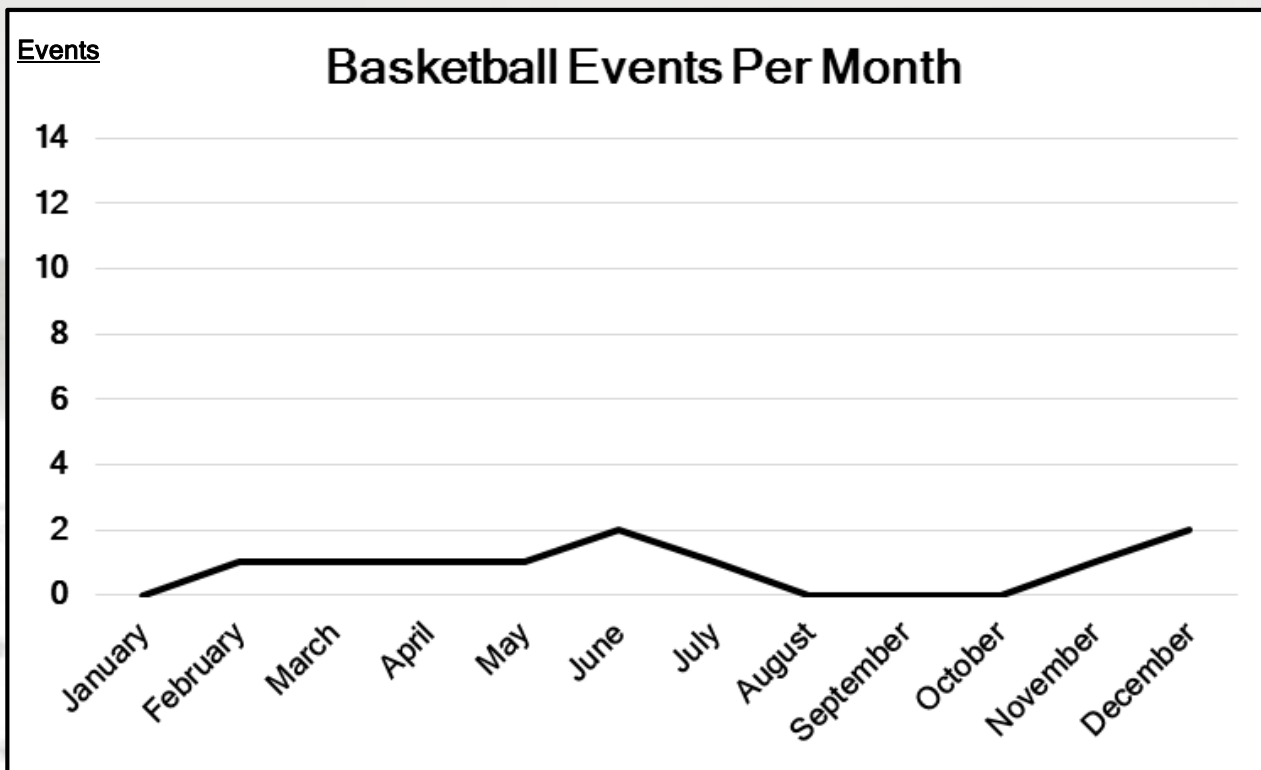


Source: Lee County Sports Development

Lee County averages less than one soccer sports tourism event per month. With the high local popularity of the sport and increasing youth soccer participation nationwide, there could be opportunities for Lee County to host more soccer events if tournament-caliber facilities were available.



2015 BASKETBALL SEASONALITY

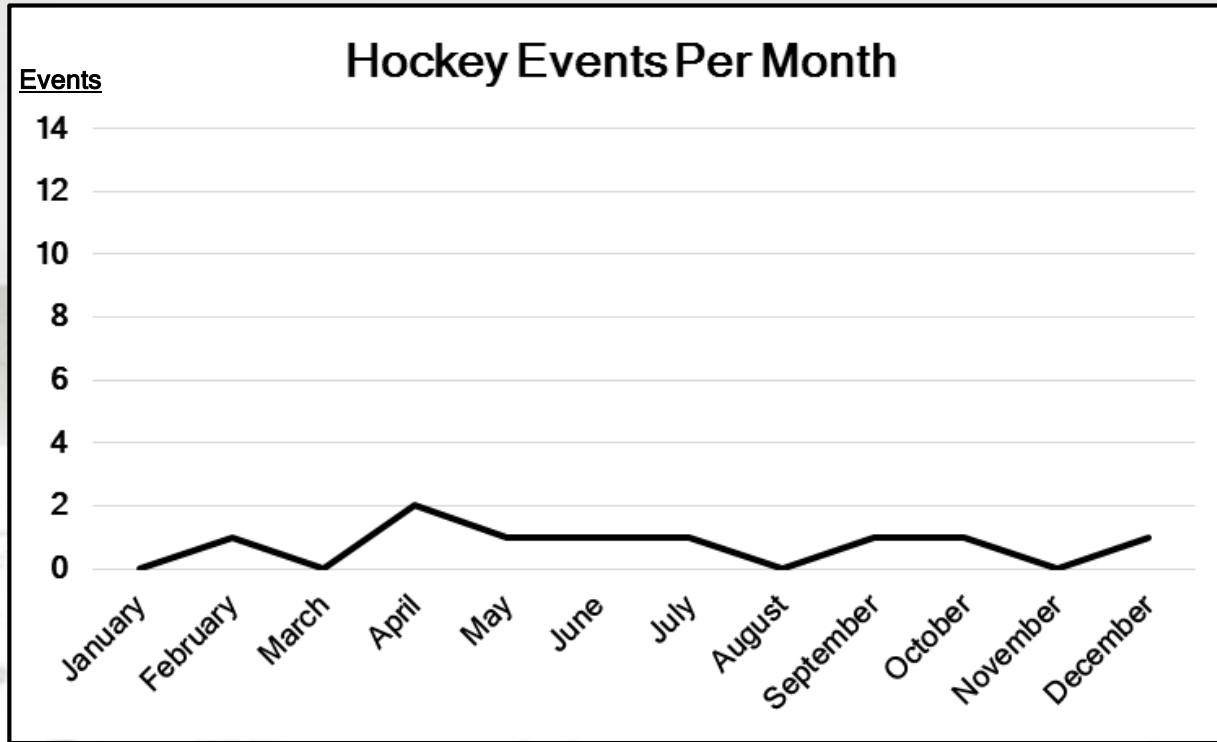


Source: Lee County Sports Development

There were only 10 basketball sports tourism events held in Lee County in 2015. A lack of a large, indoor, multi-court facility for basketball tournaments may be the reason for minimal event activity and/or interest.



2015 HOCKEY SEASONALITY



Source: Lee County Sports Development

Hockey sports tourism (both ice and inline) held 9 events in 2015. Most events were held at Germain Arena.



SECTION 4 LOCAL FACILITY INVENTORY



FACILITY SATISFACTION METHODOLOGY

As part of our community survey process, Victus Advisors gathered feedback from local sports participants regarding their satisfaction with the primary sports venues that are marketed by the County's Sports Development team. Survey respondents were asked to rate their satisfaction with each facility on a 7-point scale, in which "7" represents "Very Satisfied" and "1" represents "Very Dissatisfied"

Results were evaluated using "Top-2 Box" combined scores ("7" + "6", representing the highest levels of satisfaction) and "Bottom-3 Box" ("3" + "2" + "1", representing the lowest satisfaction levels)



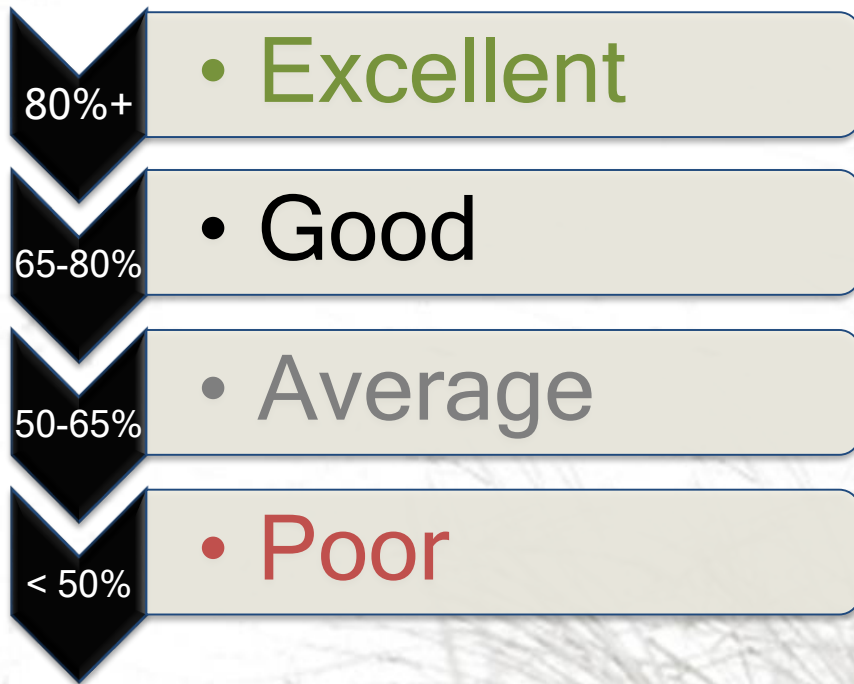


SATISFACTION METHODOLOGY (CONT.)

Our Top-2 Box methodology is a best-in-class approach to facility satisfaction measurement. A similar satisfaction methodology is utilized by many customer service-oriented businesses (such as department stores, hotels, banks, etc.).

The focus on Top-2 Box scores places a higher emphasis on the priority of achieving maximum satisfaction (scores of 6 or 7) from every visitor.

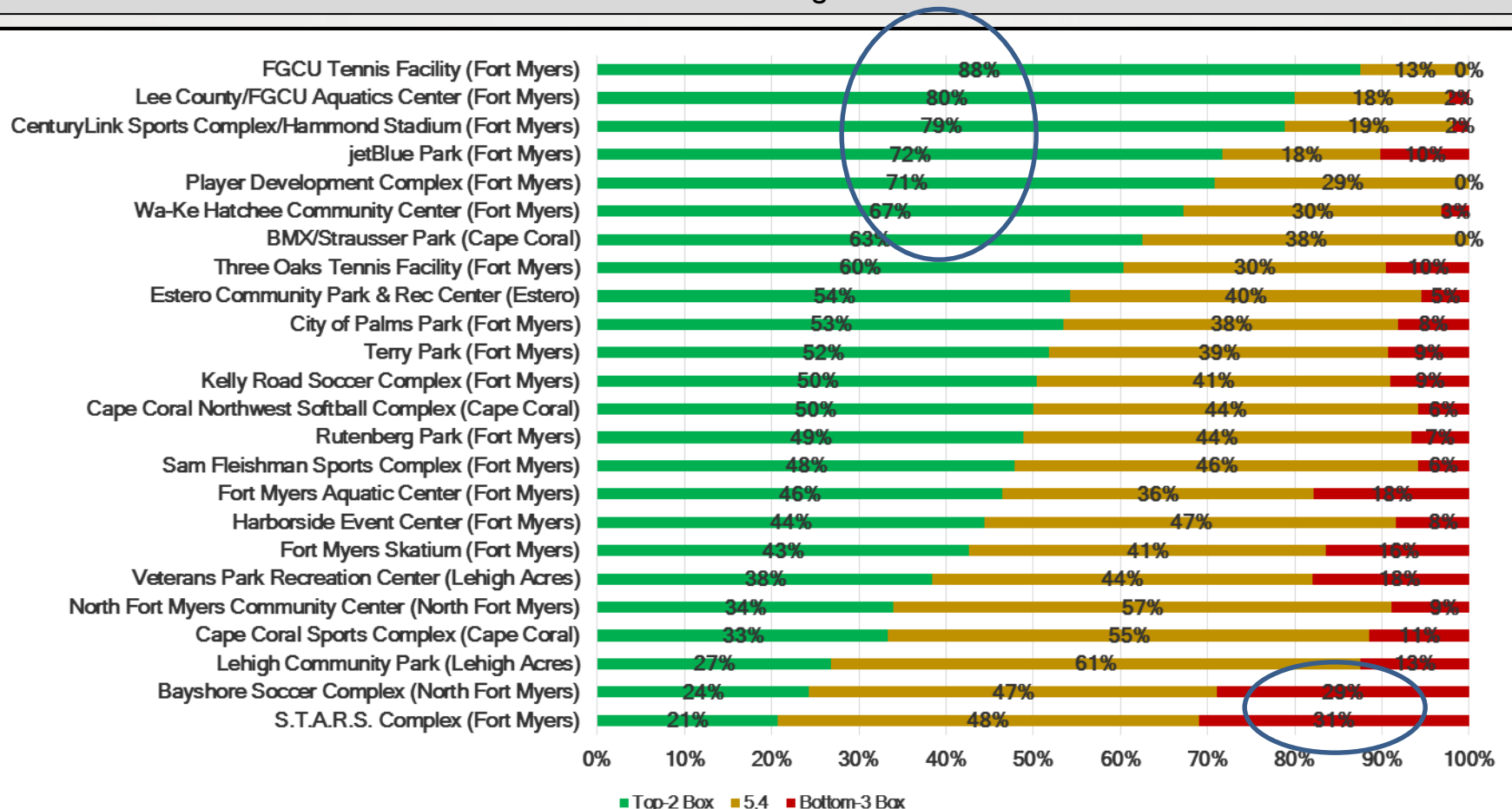
*General Top-2
Box score
standards for
facility
satisfaction
analysis*





SATISFACTION W/ LEE COUNTY SPORTS FACILITIES

The FGCU Tennis Facility received the highest satisfaction rating, with the Lee County/FGCU Aquatics Center and the CenturyLink Sports Complex/Hammond Stadium the second and third highest rated, respectively. It is also worth noting the Bayshore Soccer Complex and S.T.A.R.S. Complex received the worst ratings.



Note: Sorted by Top-2 Box score in descending order



FGCU TENNIS FACILITY

- Top-2 Box Rating: 88% (Excellent)
- Opened: 2000
- Owner/Operator: Florida Gulf Coast University
- Features:
 - 12 regulation-sized tennis courts
- Sample Events:
 - FGCU men's and women's home matches
 - High school, state, and national tournaments
 - Tennis, camps and clinics
- User comments:
 - There was very little sports tourism user feedback of any kind regarding this facility.





LEE COUNTY/FGCU AQUATICS CENTER



- Top-2 Box Rating: 80% (Excellent)
- Opened: 2004
- Owner/Operator: Florida Gulf Coast University
- Features:
 - 2 outdoor pools
 - 1 50-meter Olympic-sized
 - 1 25-yard recreational pool
 - 4 diving boards and a diving well
- Sample Events:
 - FGCU women's swimming and diving meets
 - Public access for open swim
 - Swim lessons and camps
- User comments:
 - Local stakeholders noted that the outdoor aquatic center at FGCU did not materialize as all had hoped, in terms of deck space, spectator seating capacity, and other factors that could have made the facility more viable for larger regional/national swim meets.





CENTURYLINK SPORTS COMPLEX



- Top-2 Box Rating: 79% (Good)
- Opened: 2015 (Renovated)
- Renovation Cost: \$48.5 Million
- Footprint: 94 acres
- Owner: City of Fort Myers
- Operator: Lee County
- Features:
 - 1 baseball stadium (Hammond)
 - 9,300 seating capacity
 - 4 adult baseball fields
 - 4 adult lighted softball fields
 - 2 half-sized baseball fields
 - 1 multi-use field
- Sample Events:
 - Home to Fort Myers Miracle (Single-A) and Gulf Coast League Twins (Rookie)
 - Adult softball leagues
 - National and state softball and baseball tournaments
- User comments:
 - A softball tournament promoter feels that the complex is the best of all the sports facilities in Lee County.





JETBLUE PARK

- Top-2 Box Rating: 72% (Good)
- Opened: 2012
- Footprint: 106 acres
- Owner/Operator: Lee County
- Features:
 - 1 baseball stadium
 - 12,440 seating capacity
 - 6 baseball fields
 - 6 soccer fields
- Sample Events:
 - Adult and youth baseball tournaments
 - Roy Hobbs and Perfect Game
 - Private parties, expos, festivals etc.
 - Select soccer games and tournaments
- User comments:
 - Two survey respondents identified the need for permanent restrooms that were closer to the soccer fields.





PLAYER DEVELOPMENT COMPLEX

- Top-2 Box Rating: 71% (Good)
- Opened: 1993
- Owner/Operator: Lee County
- Features:
 - 5 adult baseball fields
 - 8 batting tunnels
 - Clubhouse, locker rooms, and other auxiliary rooms
- Sample Events:
 - Adult baseball tournaments
 - Roy Hobbs, Baseball International
 - Gene Cusic Collegiate Classic
- User comments:
 - Several users stressed the need for field lights and parking lot lights at the complex.
 - The primary user of the facility indicated that they had existing demand for at least three additional fields at the Player Development Complex to expand their existing tournaments.
 - Another tournament promoter would like to see up to 16 youth baseball/softball fields.





WA-KE HATCHEE COMMUNITY CENTER

- Top-2 Box Rating: 67% (Good)
- Opened: 2006
- Owner/Operator: Lee County
- Features:
 - 1 gymnasium
 - Adaptable for basketball and volleyball
 - Weight room
 - Fitness center
 - Game room
 - Aerobics and dance room
- Sample Events:
 - Public use
- User comments:
 - There was very little sports tourism user feedback of any kind regarding this facility.





BMX/STRAUSSER COMPLEX

- Top-2 Box Rating: 63% (Average)
- Opened: 1977
- Owner/Operator: City of Cape Coral
- Features:
 - 3 adult lighted softball fields
 - Each field has a seating capacity of 100
 - 1 BMX track
 - 1 concession stand
 - Public boat launch
- Sample Events:
 - National and state softball tournaments
 - National and state BMX races
 - Adult softball leagues
- User comments:
 - There was very little sports tourism user feedback of any kind regarding this facility.





THREE OAKS TENNIS FACILITY

- Top-2 Box Rating: 60% (Average)
- Owner/Operator: Lee County
- Features:
 - 12 lighted tennis courts
- Sample Events:
 - Clinics, camps, and lessons
 - Adult and youth leagues and tournaments
- User comments:
 - “We need basic storage at the majority of the parks. Our tennis directors will lug their equipment day in and day out because we have no (storage) other than Three Oaks. That’s a huge issue on an annual basis.”





ESTERO COMMUNITY PARK & REC CENTER

- Top-2 Box Rating: 54% (Average)
- Opened: 2006
- Footprint: 55 acre
- Owner/Operator: Lee County
- Features:
 - Recreation Center
 - 3 basketball courts, 4 volleyball courts, 6 pickleball courts
 - Amphitheater
 - 4 lighted bocce courts
 - 3 lighted sand volleyball courts
 - 4 multi-purpose fields (2 are lighted)
 - Disc golf course
- Sample Events:
 - AAU basketball tournaments
 - Multi-sport tournaments (i.e. Tae-Kwon-Do, etc.)
 - Outdoor sports leagues (i.e. Soccer, etc.)
- User comments:
 - “Estero Community Park should have more for kids. Water Park, lacrosse fields, Roller Hockey rink.”
 - “Estero Community park should have Lights added to their soccer fields in the back.”





CITY OF PALMS PARK



- Top-2 Box Rating: 53% (Average)
- Opened: 1993
- Footprint: 13 acres
- Owner/Operator: Lee County
- Features:
 - 1 baseball stadium
 - 7,155 seating capacity
 - 1 adult softball field
 - 50 seating capacity
- Sample Events:
 - Florida SouthWestern State baseball and softball home games
- User comments:
 - One local stakeholder expressed concerns with safety at the site.





TERRY PARK

- Top-2 Box Rating: 52% (Average)
- Opened: 1906
- Footprint: 38 acres
- Owner/Operator: Lee County
- Features:
 - 1 baseball stadium
 - 300 seating capacity
 - 3 adult lighted baseball fields
 - 8 bull-pens
 - 1 multi-use field
 - 1 clubhouse
- Sample Events:
 - Baseball leagues, tournaments, and special events
- User comments:
 - One survey respondent mentioned that the park is “very old, [with] no amenities, [and] limited seating.”





KELLY ROAD SOCCER COMPLEX

- Top-2 Box Rating: 50% (Average)
- Opened: 1994
- Footprint: 40 acres
- Owner/Operator: Lee County
- Features:
 - 6 regulation-sized lighted soccer fields
 - 1 small baseball field
 - 6 basketball courts
 - 3 tennis courts
 - Pavilions
 - 1 concession stand
- Sample Events:
 - Home to the Lee County Strikers
 - Recreational soccer, development academies, and competitive soccer club for boys and girls
 - Fields have also been used for lacrosse and other sports tournaments
- User comments:
 - “From specifically a Kelly Road standpoint, we need to do a better job of protecting our fields. There’s a lot of money that goes into maintaining the fields.” The same user cited instances where fields have been torn up by ATV usage.
 - “Maintenance of the fields has been an issue. The fields tend to settle over time.”





CAPE CORAL NORTHWEST SOFTBALL COMPLEX



- Top-2 Box Rating: 50% (Average)
- Opened: 1993
- Footprint: 15 acres
- Owner/Operator: City of Cape Coral
- Features:
 - 5 adult lighted softball fields
 - Each field has a seating capacity of 100
 - 1 concession stand
- Sample Events:
 - Adult softball leagues
 - National and state softball tournaments
- User comments:
 - There was very little sports tourism user feedback of any kind regarding this facility.





SAM FLEISHMAN SPORTS COMPLEX

- Top-2 Box Rating: 48% (Poor)
- Owner/Operator: City of Fort Myers
- Features:
 - 1 adult lighted baseball field
 - 2 youth lighted baseball fields
 - 3 lighted softball fields
 - 10 tennis courts
 - 1 swimming pool
- Sample Events:
 - Fort Myers American Little League
 - Youth softball tournaments
- User comments:
 - “At Fleishman, the restriction of coolers or outside food and drink during baseball tournaments for families is really annoying. We have to spend all day there, and the concessions are unhealthy, pricey, and take forever.”





RUTENBERG PARK

- Top-2 Box Rating: 49% (Poor)
- Opened: 1997
- Footprint: 40 acres
- Owner/Operator: Lee County
- Features:
 - 8 tennis courts
 - 3 baseball fields
 - 2 handball courts
 - 1 football field
 - 1 small pavilion
- Sample Events:
 - South Fort Myers Little League Baseball
 - Perfect Game baseball tournaments
- User comments:
 - Three survey respondents felt that the park is older, including playground equipment, and appears to be unkept.





FORT MYERS AQUATIC CENTER



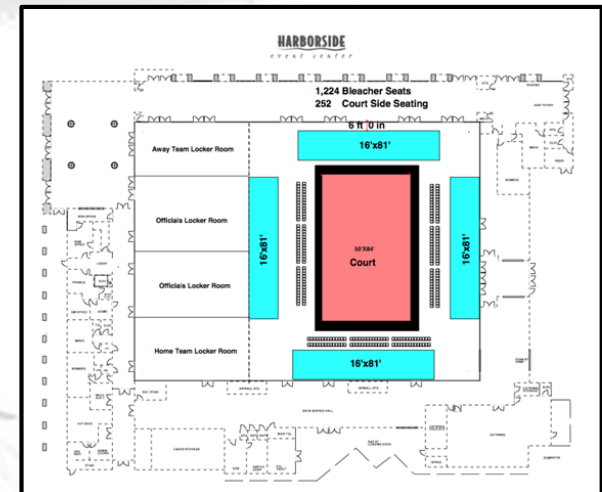
- Top-2 Box Rating: 46% (Poor)
- Opened: 2006
- Footprint: 55 acre
- Owner/Operator: City of Fort Myers
- Features:
 - 1 junior Olympic-sized pool (10 lanes)
 - Swimming pool
- Sample Events:
 - Public access for open swim
 - Swim lessons and camps
 - College team training during winter break
- User comments:
 - “The Fort Myers Aquatic Center has severe issues with water quality. There is visible algae on the pool bottom and swimmers often deal with issues affecting eyes and ears due to the water quality.”
 - “Fort Myers Aquatic Center needs to be updated and needs a facelift. The pool looks horrible and old. There's no room when events and meets are held there. It's very cramped. The pool is small.”





HARBORSIDE EVENT CENTER

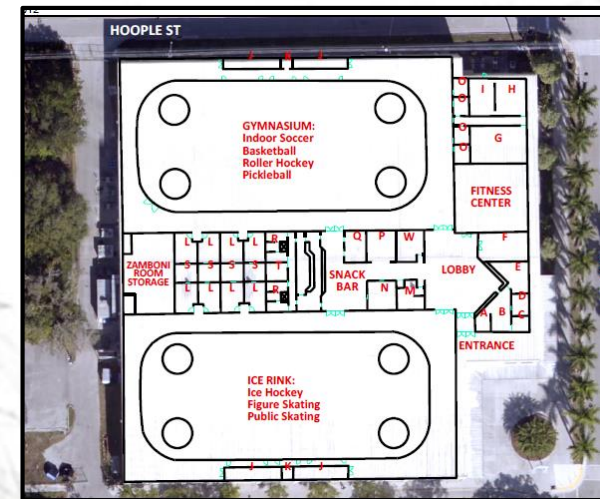
- Top-2 Box Rating: 44% (Poor)
- Opened: 1998
- Footprint: Over 42,000 sq. ft. of exhibit and event space
- Owner/Operator: City of Fort Myers
- Features:
 - Configuration space for banquets, concerts, theaters, trade shows and sports (1 basketball court)
- Sample Events:
 - Banquets
 - Concerts
 - Trade shows
 - Mixed martial arts events
 - Basketball tournaments
 - Gymnastics events
- User comments:
 - There was very little sports tourism user feedback of any kind regarding this facility.





FORT MYERS SKATIUM

- Top-2 Box Rating: 43% (Poor)
- Opened: 1998
- Footprint: 72,000 sq. ft.
- Owner/Operator: City of Fort Myers
- Features:
 - 1 NHL-sized ice rink
 - 300 seating capacity
 - 1 gymnasium
 - Adaptable for basketball, volleyball, soccer, etc.
 - 300 seating capacity
 - 4 party rooms
 - Locker rooms and training rooms
 - Weight room and fitness center
- Sample Events:
 - Adult and youth indoor soccer leagues
 - Indoor volleyball leagues
 - Adult and youth hockey leagues
 - Youth basketball leagues
- User comments:
 - “[The] Skatium is in a very bad area. I will not got to the Skatium ever again.”





VETERANS PARK RECREATION CENTER

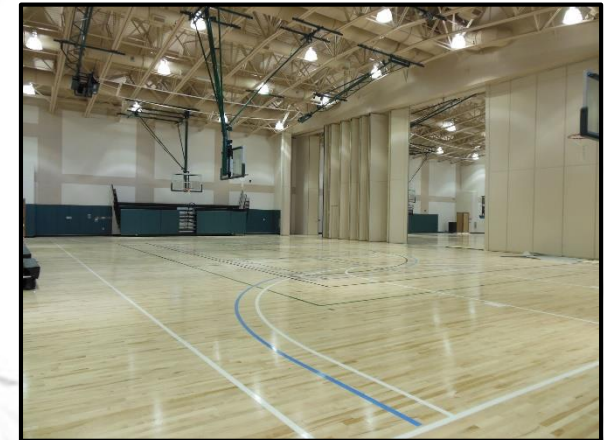
- Top-2 Box Rating: 38% (Excellent)
- Opened: 2004
- Footprint: 38,000 sq. ft.
- Owner/Operator: Lee County
- Features:
 - 2 regulation-sized basketball courts
 - Adaptable for volleyball and indoor soccer
- Sample Events:
 - Public use
 - Recreational leagues for youth
- User comments:
 - There was very little sports tourism user feedback of any kind regarding this facility.





NORTH FORT MYERS COMMUNITY CENTER

- Top-2 Box Rating: 34% (Poor)
- Opened: 1997 (park); 2013 (recreation center)
- Footprint: 51 acres (park); 33,000 sq. ft. (recreation center)
- Owner/Operator: Lee County
- Features:
 - Recreation center
 - 1 main gymnasium with adaptability for basketball, volleyball, and pickleball
 - 4 baseball fields
 - 2 football fields
 - 1 practice field
 - 1 pavilion
 - Disc golf course
- Sample Events:
 - Youth basketball tournaments
 - North Fort Myers Knights football practices and games
 - Baseball tournaments
 - Public use
- User comments:
 - “North Fort Myers Community center [seems] run down.”





CAPE CORAL SPORTS COMPLEX

- Top-2 Box Rating: 33% (Poor)
- Opened: 1994
- Footprint: 52 acres
- Owner/Operator: City of Cape Coral
- Features:
 - 5 adult lighted softball fields
 - 5 regulation-sized lighted soccer fields
 - 4 regulation-sized lighted baseball fields
 - 3 concession stands
- Sample Events:
 - Adult men's softball leagues
 - National and state softball tournaments
 - Little League Junior Senior Baseball practices and games
 - Cape Coral Youth Soccer Association practices and games
- User comments:
 - One survey respondent complained about the smell of both the restrooms and the facility in general.





LEHIGH COMMUNITY PARK

- Top-2 Box Rating: 27% (Poor)
- Opened: 1976
- Owner/Operator: Lee County
- Features:
 - 3 baseball fields
 - 3 pavilions
 - 2 tennis courts
 - 1 softball field
 - 1 football field
 - 1 practice field
 - 1 pool
- Sample Events:
 - Public use
 - Baseball leagues and tournaments
- User comments:
 - “The pool is soooo tiny! There are no diving blocks for the swim team to practice with. It is not equipped electronically to hold meets and events. It can only be used as a practice pool but is extremely cramped for swimmers.”





BAYSHORE SOCCER COMPLEX



- Top-2 Box Rating: 24% (Poor)
- Opened: 1987
- Footprint: 13 acres (On Bayshore Elem. School Property)
- Owner: City of North Fort Myers
- Operator: Lee County
- Features:
 - 7 regulation-sized lighted soccer fields
 - 1 pavilion
 - Picnic area
- Sample Events:
 - Home to the North Fort Myers Soccer Club
 - Boys and girls from four to 18 years old
 - Fields are adaptable for multi-use such as football, etc.
- User comments:
 - “Field conditions at Bayshore are almost dirt instead of grass.”





S.T.A.R.S. COMPLEX

- Top-2 Box Rating: 21% (Poor)
- Owner/Operator: City of Fort Myers
- Features:
 - 1 adult lighted baseball field
 - 2 youth lighted baseball fields
 - 2 tennis courts
 - 1 lighted softball field
 - Swimming pool
 - 1 concession stand
 - 1 gymnasium
 - Adaptable for basketball and volleyball
- Sample Events:
 - Baseball and softball leagues for adults and youth
- User comments:
 - “STARS needs an upgrade to freshen it up. Whether it be County money or City money, let's put our good tax money to use. If we're going to spend \$85 million so a baseball team can make money at JetBlue Park, let's spend some money for our very own community, too -- especially since the hotel bed tax money should give us some extra funds to spend on non-baseball sports facilities.”





SUMMARY - LEE COUNTY-OPERATED FACILITIES

Facility	Number of County Operated Fields/Courts (1)			
	Baseball Fields	Softball Fields	Soccer/Multi-Use Fields	Basketball Courts
Bayshore Soccer Complex	-	-	7	-
CenturyLink Sports Complex (2)	4	4	1	-
City of Palms Park	1	1	-	-
Estero Community Park	-	-	4	3
JetBlue Park (2)	6	-	6	-
Kelly Road Soccer Complex	-	-	6	-
Lehigh Community Park	3	1	2	-
North Ft. Myers Community Center	4	-	3	2
Player Development Complex	5	-	-	-
Rutenberg Park	3	-	1	-
Terry Park	4	-	1	-
Veterans Park Recreation Center	-	-	-	2
Wa-Ke Hatchee Community Center	-	-	-	2
TOTAL	30	6	31	9

Source: Lee County Sports Development

Note: Sorted by Facility in descending order

(1) Includes both adult and youth fields/courts

(2) Excludes JetBlue Stadium and Hammond Stadium

The above chart summarizes the facilities Victus Advisors reviewed in this section that are operated by Lee County. Worth noting is that there is no single baseball, softball, or multi-use field complex in Lee County with a cluster of 8 or more tournament caliber fields. The fragmented nature of Lee County's field inventory could be a disadvantage when marketing to larger tournament organizers who typically seek a centralized location for their events.



SECTION 5 COMPARATIVE FACILITIES - REGIONAL/NATIONAL



COMPARABLE VENUES

Victus Advisors analyzed existing sports facilities located in the comparative markets that were identified by the Sports Development team as primary competitors for amateur sports events:

- Foley Sports Complex & Foley Sports Tourism Complex, Foley, Alabama
- LakePoint - Emerson, Georgia
- Rocky Top Sports World - Gatlinburg, Tennessee
- The Ripken Experience - Myrtle Beach, South Carolina
- The Ripken Experience - Pigeon Forge, Tennessee

In addition, we also reviewed ten (10) other sports facilities located in Florida that were identified by the Sports Development team, local stakeholders, and survey respondents as in-state comparable venues and markets. Unless otherwise noted, the sources of information on the following pages were facility management:

- Delray Beach Tennis Center - Delray Beach
- Doyle Aquatic Center at The Long Center - Clearwater
- ESPN Wide World of Sports Complex - Orlando
- Frank Brown Park - Panama City Beach
- Nathan Benderson Park - Sarasota
- North Collier Regional Park - Naples
- Northeast Regional Park - Davenport
- Northwest Recreation Complex - Apopka
- Seminole County Sports Complex - Sanford
- The Premier Sports Campus - Lakewood Ranch



NATIONAL FACILITIES



FOLEY, ALABAMA



Foley Sports Complex

- Opened: 2009
- Cost: \$20 Million
- Owner/Operator: City of Foley
- Features:
 - 10 youth baseball/softball fields
 - 5 youth soccer fields
- Events:
 - There are over 20 weekend events/tournaments planned for 2017 including football, baseball, and softball.



Foley Sports Tourism Complex

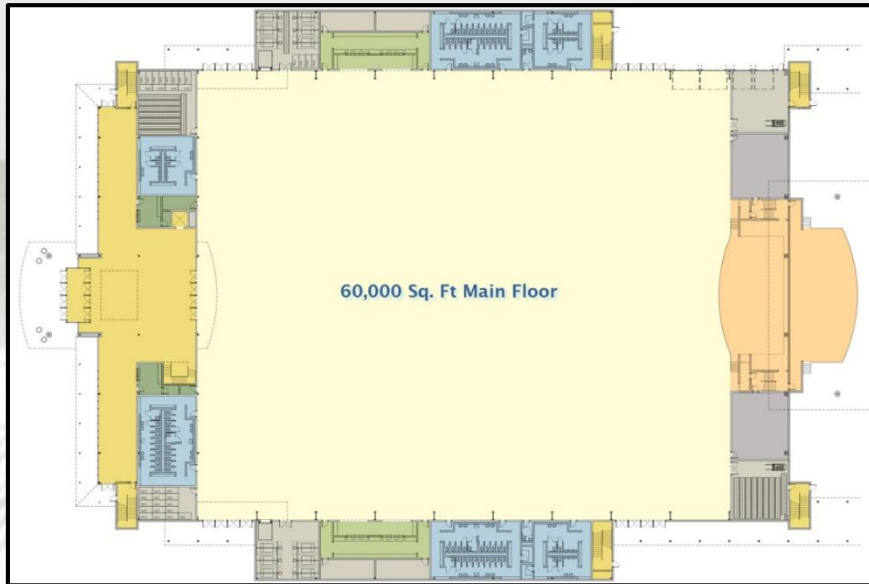
- Opened: 2015
- Cost: \$27 Million (Part of \$75 Million development project)
- Owner/Operator: City of Foley
- Features:
 - 16 multi-use fields
 - 104,000 sq. ft. events center (Summer of 2017)
 - Adaptable for basketball, volleyball and other sports
- Events:
 - There are 45 events/tournaments planned for 2017 including football, soccer, and lacrosse.





FOLEY, ALABAMA (CONT.)

Foley Sports Tourism Complex



Events Center Floor Plan





LAKEPOINT

Emerson, Georgia

- Opened: 2014 (First phase)
- Cost: \$1 Billion (Financed Publicly/Funded Privately)
- Footprint:
 - Located one hour outside Atlanta
 - 1,300 + acre indoor/outdoor complex
- Owner/Operator: LakePoint Sports
- Current Features:
 - 8 major league sized baseball fields
 - 3 multi-use fields
 - 10 sand volleyball courts
 - Miniature golf course
 - Wakeboard park
 - 170,000 sq. ft. indoor facility
 - 12 basketball courts
 - 24 volleyball courts
 - 3 on-site hotels
 - 4 restaurants
- Second Phase Additions:
 - 9 additional multi-use fields
 - Track and field complex
 - 9 hole golf course
 - Tennis academy
 - 15 youth baseball/softball fields
 - Additional mixed-use retail development





LAKEPOINT (CONT.)



PERFECT GAME



- Events & Economic Impacts: *(note: includes indoor/outdoor sports)*
 - LakePoint hosts hundreds of events year-round including:
 - Adult and youth recreation leagues for basketball, football, soccer, and futsal
 - Camps and clinics for various sports
 - National and regional tournaments
 - A Georgia Tech study projected the following:
 - At completion of all phases, LakePoint will attract six million visitors and generate \$520 million in revenue annually. Additionally, Bartow County is projected to receive \$20 million in tax revenues each year.
 - Events at LakePoint will generate 1.8 million rooms per year. That number is expected to rise as more events are added.
 - LakePoint's CEO stated that 26,000 jobs were generated by the project and that 12,000 will work at the development at full completion. Additionally he said Bartow County is projected to receive \$20 million in tax revenues each year.
- Perfect Game:
 - Perfect Game is scheduled to hold over 100 weekend events/tournaments at LakePoint in 2017.
 - According to LakePoint's CEO, Perfect Game tournaments accounted for 50,000 hotel rooms booked at 77 Atlanta area hotels in 2014.
 - According to a Victus Advisors interview with Perfect Game, they have had to piece together as many as 53 fields (including LakePoint) in the Atlanta area for major events. Perfect Game indicated they would prefer to utilize a single, large complex in Lee County.

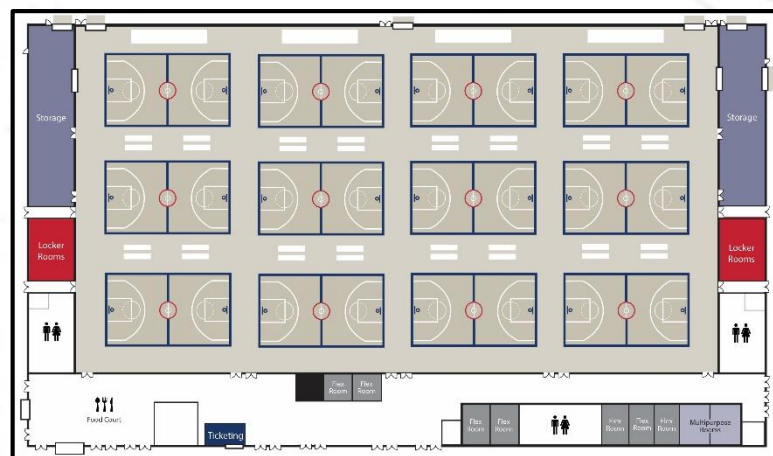


LAKEPOINT (CONT.)

LakePoint currently has three (3) artificial turf fields, 10 sand volleyball courts, eight (8) baseball fields and an indoor facility with adaptability for 12 basketball and 24 volleyball courts, respectively.



Champions Center Volleyball Configuration



Champions Center Basketball Configuration



ROCKY TOP SPORTS WORLD

Gatlinburg, Tennessee

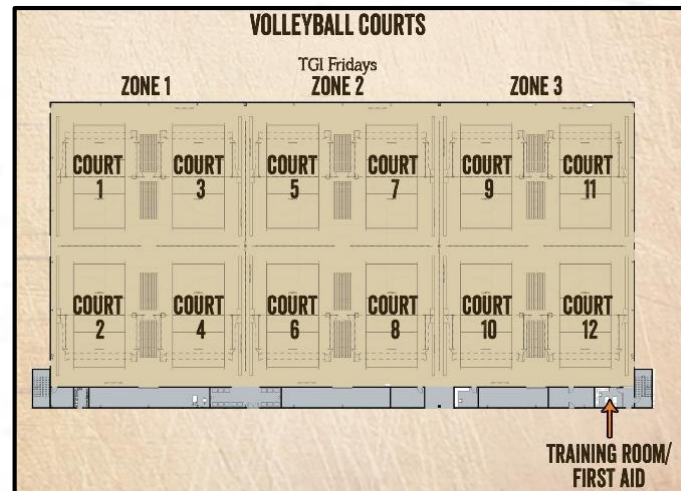
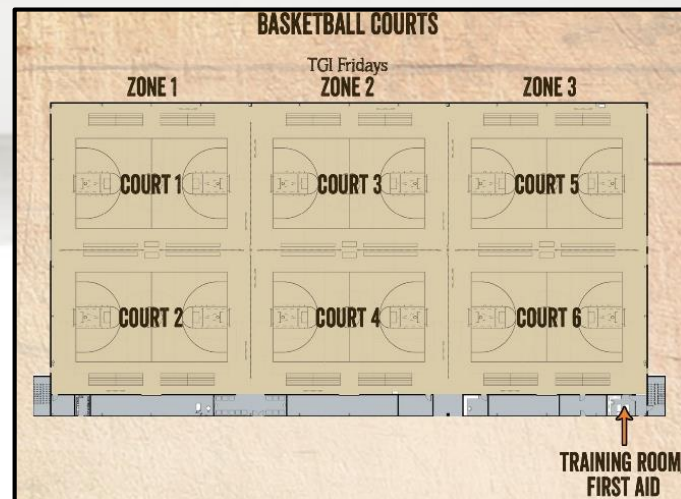
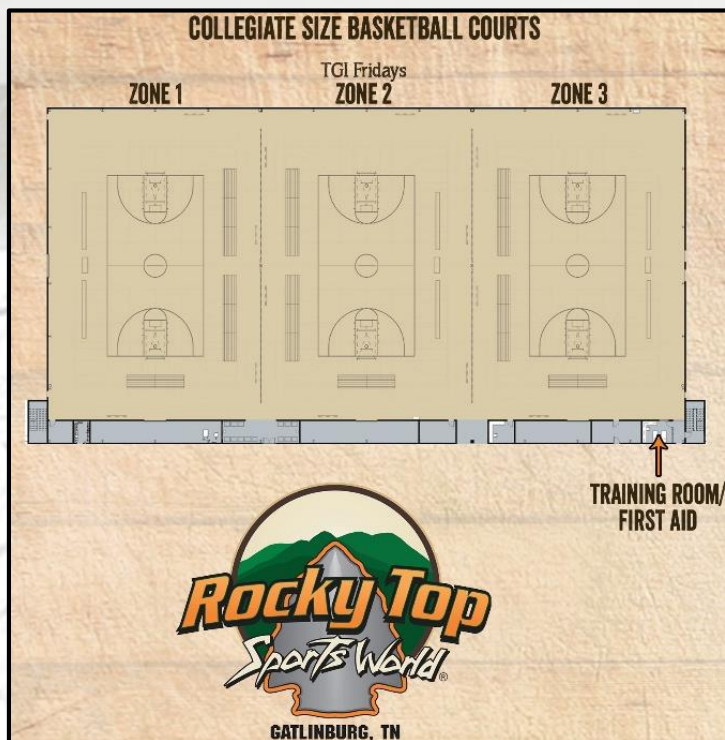
- Opened: 2014
- Cost: \$20 Million
- Footprint:
 - Located one hour outside Knoxville (Great Smoky Mountains)
 - 80 acre indoor/outdoor complex
 - Indoor facility: 86,000 sq. ft.
 - Outdoor complex: 7 multi-use fields
 - Configurable for 13 youth soccer fields
- Owners: Sevier County & the City of Gatlinburg
- Operator: Sports Facilities Management (Private)
- Indoor Sports Center Features:
 - 12 regulation volleyball courts
 - 6 regulation basketball courts
 - 3 flex rooms
 - Café and grill
- Events & Economic Impacts: *(note: includes indoor/outdoor sports)*
 - The facility hosted over 50 multi-sport tournaments, camps, and clinics for fiscal year 2015-16.
 - The facility generated approximately 15,000 hotel nights in its first year of operations.
 - Facility management estimates that they generated a \$27.5 million gross economic impact in the most recent fiscal year.





ROCKY TOP SPORTS WORLD (CONT.)

Rocky Top Sports World has multiple court configurations. The facility can accommodate up to three (3) NCAA-sized basketball courts, six (6) high school basketball courts, or 12 volleyball courts, as shown below.



*Rocky Top Indoor Multi-Sport Center
Court Configuration Options*



ROCKY TOP SPORTS WORLD (CONT.)

Rocky Top Sports World has six (6) artificial turf fields and one (1) natural turf field.





THE RIPKEN EXPERIENCE - MYRTLE BEACH

Myrtle Beach, South Carolina

- Opened: 2006
- Cost: \$24 Million
- Footprint: 50 acres
- Owner/Operator: Ripken Baseball
- Features:
 - 9 baseball fields
 - 4 regulation-sized
 - 5 youth-sized
 - Concessions
 - 2 restaurants
 - Pro shop
 - Pitching mounds, batting cages, and practice fields
- Events & Economic Impacts:
 - There are over 35 tournaments scheduled in 2017.
 - According to Ripken Baseball, the Myrtle Beach complex draws 1,200 amateur baseball and softball teams per year. Additionally, they estimate that the complex generates up to \$30 million in economic impact and accounts for 25,000 room nights per year in the Myrtle Beach area.





THE RIPKEN EXPERIENCE - MYRTLE BEACH (CONT.)

The Ripken Experience in Myrtle Beach currently has nine (9) baseball fields with plans to add more.





THE RIPKEN EXPERIENCE - PIGEON FORGE

Pigeon Forge, Tennessee

- Opened: 2016
- Cost: \$22.5 Million
- Footprint: 90 acres
- Owner: City of Pigeon Forge
- Operator: Ripken Baseball
- Features:
 - 6 youth-sized fields
 - Two-level clubhouse
 - Concessions
 - 12 batting cages and bullpens
- Events & Economic Impacts:
 - The City of Pigeon Forge estimated that the complex generated about \$6.7 million in economic impact within the first three months of opening.
 - It is projected that the complex will attract more than 82,000 visitors per year.







REGIONAL FACILITIES



DELRAY BEACH TENNIS CENTER

Delray Beach

- Opened: 1992
- Owner: City of Delray Beach
- Operator: JCD Sports Group
- Features:
 - 14 clay courts
 - 7 hard courts
 - 1 stadium court
 - Seating capacity of 8,200
- Events & Economic Impacts:
 - The Tennis Center has previously hosted the prestigious Davis Cup.
 - In addition to other major and minor tennis tournaments, camps, and public-use, the facility also promotes pickleball events and classes.
 - According to the Delray Beach Community Redevelopment Agency, the Tennis Center generates \$8.7 million in economic impact per year.
 - The City recently commissioned a study to examine the feasibility and economic impact of renovating the stadium to host concerts and other sports events.
- User comments:
 - “My ideal [example for tennis] is Delray Beach. It has additional courts. You could have a draw and professional events with that kind of facility.”



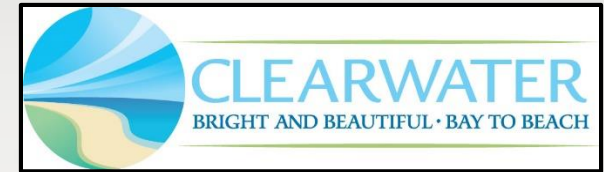


DOYLE AQUATIC CENTER AT THE LONG CENTER



Clearwater

- Owner/Operator: City of Clearwater
- Features:
 - 25 x 50 M indoor pool
 - 2, 25-yard, 10 lane courses
 - 25-yard, 3 lane pool
- Events & Economic Impacts:
 - Home to local swim clubs and teams, and public use
 - Hosts state, regional, and national tournaments including USA Swimming sanctioned events
- User comments:
 - “The [Doyle Aquatic Center] in Clearwater ... [is a facility] that FGCU competes with.”





ESPN WIDE WORLD OF SPORTS COMPLEX

Orlando

- Opened: 1997
- Cost: \$120 million
- Footprint: 252 acres
- Owner/Operator: Walt Disney Attractions
- Features:
 - 4 regulation-sized baseball fields
 - 1 baseball stadium
 - Seating capacity for 9,500
 - 6 softball fields
 - 17 multi-use fields
 - Track and field complex
 - Fieldhouse
 - Seating capacity for 5,000
 - Adaptable for 4 basketball courts and 9 volleyball courts
 - Multi-sport indoor facility
 - Seating capacity for 1,200
 - Adaptable for 6 basketball courts and 12 volleyball courts
 - 10 clay tennis courts
 - Clubhouse shop and grill





ESPN WIDE WORLD OF SPORTS COMPLEX (CONT.)

- Events & Economic Impacts:
 - The complex hosts over 300 events per year and attracts more than 360,000 athletes and 1.5 million total visitors.
 - The complex is estimated to drive approximately 700,000 annual room nights to Central Florida.
- User comments:
 - “The worst part of any team competing there is that families, especially in soccer travel, when you go to Disney everyone that goes has to pay to go and watch their child. And you can’t bring in a drink of water. It just becomes almost cost-prohibitive.”
 - “Wide World of Sports is well done...can handle most tourneys in one place. But when there for sports, it's hard to enjoy Disney.”





FRANK BROWN PARK



Panama City Beach

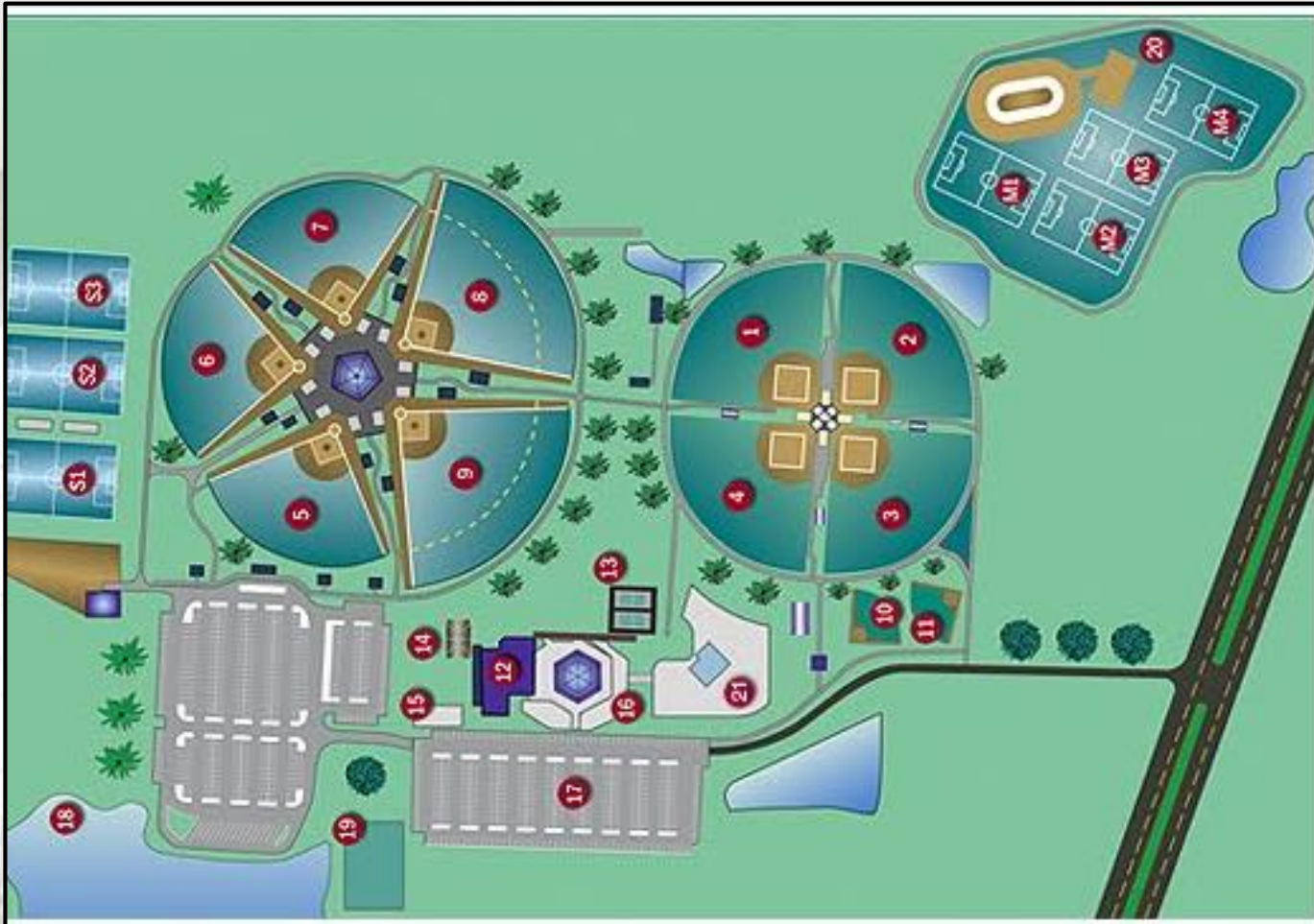
- Opened: 2016 (Renovated)
- Owner/Operator: Panama City Beach
- Features:
 - 9 softball/baseball fields
 - 1 t-ball field
 - 3 soccer fields
 - 4 multi-use football fields
 - 4 Tennis courts
 - 2 outdoor basketball courts
 - 2 shuffle-board courts
 - Indoor gymnasium
 - Adaptable for basketball, volleyball and other sports
 - Outdoor aquatic center
 - 50 M Olympic pool
- Events & Economic Impacts:
 - The park hosted over 25 tournaments in 2016 equating to over 100 event days. Baseball, softball, football, soccer, and rugby are the sports with the largest tournaments.
 - According to the Panama City CVB, the park is operating at capacity and they have had to turn away business due to: a) lack of additional fields, and b) lack of an adequate indoor facility.





FRANK BROWN PARK (CONT.)

Frank Brown Park has nine (9) softball/baseball fields and a total of seven (7) multi-use fields.





NATHAN BENDERSON PARK

Sarasota

- Opened: 2014 (Rowing Center)
- Owner: City of Sarasota
- Operator: Suncoast Aquatic Nature Center Association
- Features:
 - 2,000 M sprint rowing course
 - Regatta center
- Events & Economic Impacts:
 - The park hosts various rowing events and will host the 2017 World Rowing Championships and the 2018 World Rowing Masters Regatta.
 - Sarasota County reported that the 2015 Pentathlon World Cup alone generated nearly \$6 million in economic impact.
- User comments:
 - “Sarasota has Nathan Benderson Park that was made for rowing and engineered/designed perfectly for rowing and flat-water paddling events. The problem is that it’s really expensive and not that far away, so to do what they did, I’m not sure if that’d be necessary down here. But that’s a fantastic paddling facility up there.”





NORTH COLLIER REGIONAL PARK

Naples

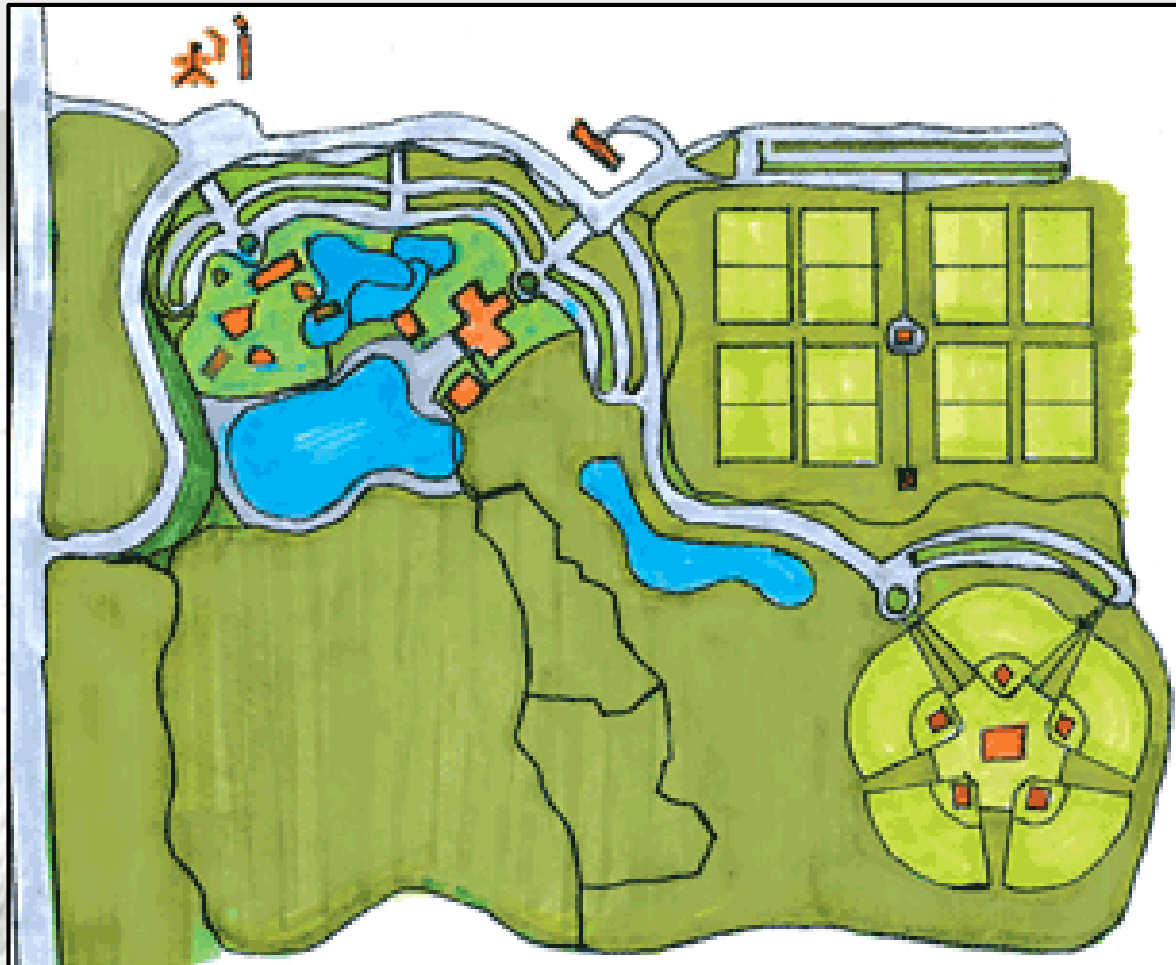
- Opened: 2006 (Addition of soccer and softball fields)
- Owner/Operator: Collier County
- Features:
 - 8 regulation-sized soccer fields
 - 5 regulations-sized softball fields
 - Fitness complex
 - Gymnasium with adaptability for basketball and volleyball courts
 - Water park
- Events & Economic Impacts:
 - According to a recent study commissioned by Collier County, the park held 27 events equating to 78 event days. Additionally the park drew over 27,000 visitors and accounted for just under 10,000 room nights.
- User comments:
 - “We go down to North Collier to play (basketball) for my two boys because there is nothing here [for basketball].”





NORTH COLLIER REGIONAL PARK (CONT.)

North Collier Regional Park has eight (8) soccer fields, five (5) softball fields, and a gymnasium.





NORTHEAST REGIONAL PARK



Davenport

- Opened: 2012
- Owner/Operator: Polk County
- Features:
 - 6 multi-use fields
 - Recreational tennis courts
 - Recreational racquetball courts
 - Recreational basketball courts
- Events & Economic Impacts:
 - According to the Polk County Tourism Sports Marketing team, the park only held three sports tourism events in 2016 and is primarily utilized for local use.
 - Subsequent phases include a baseball/softball complex, but is not in the foreseeable future due to a lack of funding.
- User comments:
 - “This is a tremendous model of a multi-purpose campus.”
 - “Everything is maintained and clean, I thought it was Disney.”





NORTHWEST RECREATIONAL COMPLEX

Apopka

- Opened: 2000
- Footprint: 180 acres
- Owner/Operator: City of Apopka
- Features:
 - 6 regulation-sized soccer fields
 - 4 multi-use fields
 - 2 lacrosse fields
 - 2 flag football fields
 - 6 baseball/softball fields
 - 4 tennis courts
 - 4 sand volleyball courts
 - Amphitheater
- Events & Economic Impacts:
 - The complex hosts local and national tournaments 45 weeks of the year for sports including: baseball, softball, football, lacrosse.
- User comments:
 - “For youth sports, I think the Northwest Recreational Complex is the best one (in Florida).”
 - “Apopka just did a huge renovation a few years ago that I think is probably the best facility I’ve seen so far as far as having a multi-use facility where you have baseball fields and tennis courts, and an amphitheater for concerts. I would probably say they lacked parking.”





NORTHWEST RECREATIONAL COMPLEX (CONT.)

Northwest Recreational Complex has 14 soccer/multi-use fields and six (6) baseball/softball fields.





SEMINOLE COUNTY SPORTS COMPLEX



Sanford

- Opened: 2016
- Cost: \$27 Million
- Footprint: 102 acres
- Owner/Operator: Seminole County
- Features:
 - 15 athletic fields
 - 9 artificial turf fields will be adaptable for baseball, softball, soccer, football, and other field sports
 - 6 natural turf fields will be exclusive to baseball and softball events
- Events & Economic Impacts:
 - Upon opening in May of 2016, the complex immediately had booked 38 tournaments for the rest of the year. County officials estimated those events generated \$50 million in economic impact to the economy and 36,000 room nights.

ORLANDO NORTH SEMINOLE COUNTY SPORTS





SEMINOLE COUNTY SPORTS COMPLEX (CONT.)

Seminole County Sports Complex has 15 athletic fields: nine artificial turf fields for baseball, softball, soccer, football, while six natural turf fields will be exclusive to baseball and softball events.





THE PREMIER SPORTS CAMPUS

Lakewood Ranch

- Opened: 2011
- Footprint: 140 acres
- Owner/Operator: Schroeder-Manatee Ranch
- Features:
 - 22 multi-use fields
- Events & Economic Impacts:
 - The complex was built within the 8,500-acre Lakewood Ranch master-planned community which was started in 1995.
 - Complex officials state that they hosted 46 total events in 2016 and received up to 75,000 total visitors.
- User comments:
 - "We use the fields up at Lakewood Ranch. That's a huge complex. It's growing there, they are adding things to it all the time."
 - "Lakewood Ranch... has no infrastructure, muddy parking lots, one Publix...I don't like going there."





THE PREMIER SPORTS CAMPUS (CONT.)

The Premier Sports Campus has 22 multi-use fields.





SUMMARY - COMPARABLE FACILITIES

Facility	City, State	Year Open	Construction Cost (\$M)	Number of Fields/Courts (1)			
				Baseball Fields	Softball Fields	Soccer/Multi-Use Fields	Basketball Courts
ESPN Wide World of Sports Complex	Orlando, FL	1997	120.0	5	6	17	10
Foley Sports Complex	Foley, AL	2009	20.0	-	10	5	-
Foley Sports Tourism Complex	Hampton, VA	2008	27.0	-	-	16	1
Frank Brown Park	Panama City Beach, FL	2016	N/A	-	9	7	1
Lakepoint	Emerson, GA	2014	1,000.0	8	-	3	12
North Collier Regional Park	Naples, FL	2006	N/A	-	5	8	1
Northeast Regional Park	Davenport, FL	2012	N/A	-	-	6	-
Northwest Recreational Park	Apopka	2000	N/A	-	6	14	-
Rocky Top Sports World	Gatlinburg, TN	2014	20.0	-	-	-	-
Seminole County Sports Complex	Sanford, FL	2016	27.0	-	6	9	-
The Premier Sports Campus	Lakewood Ranch, FL	2011	N/A	-	-	22	-
The Ripken Experience	Pigeon Forge, TN	2016	22.5	6	-	-	-
The Ripken Experience	Myrtle Beach, SC	2006	24.0	9	-	-	-

Sources: Facility Management, Victus Research

Note: Sorted by Facility in alphabetical order

(1) Includes both adult and youth fields/courts

SIZE & CONFIGURATIONS

The comparable facilities reviewed in this section, as shown above, range from five to 10 baseball fields, 5 to 10 softball fields, up to 22 soccer/multi-use fields, and up to 12 basketball courts (also convertible to volleyball courts).

TOURNAMENTS & VISITORS

The comparable facilities we analyzed (excluding ESPN Wide World of Sports) are expected to host an average of 33 tournaments and 61,000 annual visitors each year.



SECTION 6 LOCAL INTERVIEW & FOCUS GROUP SUMMARY



LOCAL ONE-ON-ONE INTERVIEWS



In November 2016, Victus Advisors held informational meetings and in-person interviews in Lee County with sixteen (16) project stakeholders and community leaders including:

- Jeff Webb, Hampton Inn Colonial
- Colleen DePasquale, Greater Fort Myers Chamber of Commerce
- Rachel Busch, Lee County Economic Development
- Will Prather, Prather Entertainment Group
- Mark Weber, Minnesota Twins
- Ben Ford, Perfect Game
- Carl McAloose, Florida Southwestern College
- Katie Haas, Boston Red Sox
- Tom Giffen, Roy Hobbs
- Tommy Bowens, Lee County School District
- John Naylor, City of Palms Basketball Classic
- Allison Gruber, Lee County Parks & Recreation Advisory Board
- John Yarborough, Former Lee County Parks & Recreation Executive
- Rob Wells, Tarpon Lodge
- Craig Brush, Florida Everblades Hockey Club
- Jim Larkin, Crowne Plaza Hotel



LOCAL FOCUS GROUPS



In November 2016, Victus Advisors also held focus groups with eighteen (18) key local professional and amateur sports leaders including:

Session I: 9 Participants

- John Cedarburg - SWIFL Baseball
- Michael Hammond - Calusa Blueway
- Charles Johnson - Southwest Florida Fencing Academy
- Gina Watters - Pop Warner Football & Cheer
- Marcy Ferguson - North Fort Myers Soccer Club
- Bill Ziegler - Lee County Archers
- Greyson Huber - Fort Myers Baseball League
- Fran Podraza - Amateur Baseball Association of Southwest Florida
- Don Henshaw - Gulf Coast Swim Team

Session II: 9 Participants

- Bryan Vince - Naples Hammerheads Rugby
- Jeff Richards - Lee County Strikers
- Nicole Schoensee - Acosta Academy
- Andrew Santos - Gulf Coast Waves Baseball
- Bruce Schmelzer - Buckingham Little League
- Howard Gold - South Fort Myers Little League
- Melinda Mack - Cape Coral and South Florida Canoe and Kayak Club
- Lyn Bruner - Lee County Community Tennis Association
- Joe Stabile - Gateway Charter High School



INTERVIEW & FOCUS GROUP TOPICS

- Perceptions of Lee County's current amateur sports facilities
- Perceptions of other cities and facilities that host amateur sports events
- Opinions regarding specific amateur sports in Lee County:
 - Most established/successful sports
 - Emerging or underserved sports with growth potential
- Opinions regarding the local support for amateur sports in Lee County (Sports Development, local business community, etc.)



KEY FINDINGS: ONE-ON-ONES & FOCUS GROUPS



LEE COUNTY FACILITIES:

- *Baseball - Most agree that the facilities are excellent.*
 - “As far as any new facilities needed, the return on investment would probably be made up within the first few years, there is no doubt.”
 - “[There’s a baseball promoter]; he owns a couple of small tournaments here and he just doesn’t do more because he can’t get time. So it’s not for lack of demand, its lack of supply.”
 - “Biggest problem is that we’re maxed out on fields.”
 - “And as far as any new facilities needed there’s no doubt you could add a 4-plex or a 5-plex or a 6-plex and it’s going to get used. They’re going to fill it with tournaments.”
 - “My frustration is Sunday is the last day of a weekend tournament, so the fields aren’t being used, but they’ll block them all off and they’re usually just doing the semi-final and championship game. So usually they’re using two to four fields max and there’s 22 fields.”
 - Many interviewees feel there is a major need for lights at the Player Development Complex.
 - “The lights at the 5-plex [Player Development Complex] are extremely important. It would take some pressure off of Terry Park.”
 - Safety was a concern for many interviewees at both the Player Development Complex and at City of Palms Park.



KEY FINDINGS (CONT.)

LEE COUNTY FACILITIES (CONT.):

- *Rugby* - One rugby group uses the fields at Estero Community Center and finds it challenging to get more space elsewhere.
- *Fencing* - A local fencing group is having trouble finding a good indoor facility for training (six to seven days a week).
 - “I could grow the sport, but I’m reluctant to even advertise to try to get more people involved because the facility I have right now is 2,500 sq. ft. and I’m at maximum capacity. I can’t add any more people.”
- *Football/Cheerleading* - A local football/cheerleading interviewee cited the need for access to an indoor practice facility in the event of rain outs.
- *Swimming* - A local swim club interviewee stated that they have a good facility for smaller meets, but feels that a covered roof at the FGCU Aquatic Center would help bring in larger events.
- *Boat/Rowing Sports* - “To my knowledge there are no facilities for water sports. I don’t know of any boat house in Lee County with all the water resource that we have.”



KEY FINDINGS (CONT.)

LEE COUNTY FACILITIES (CONT.):

- *Soccer* - Most soccer groups agreed that there are not enough quality soccer fields in Lee County to meet the existing demand.
 - “There should be a big, central soccer complex.”
 - Kelly Road Soccer Complex also has been identified as having potential for sports tourism, but maintenance of the fields has been a big issue... “The fields tend to settle over time.”
- *Tennis* - “We have courts right now that are so faded....and these are our tournament sites. It’s gotten to the point where it’s almost embarrassing to invite and offer out of area athletes to come here. It’s looking tired, worn, and shabby when it shouldn’t after three years. Some of that must be the vendors that did those courts.”



KEY FINDINGS (CONT.)

OTHER COMMON SPORTS DESTINATIONS:

- *Orlando, FL* - Most interviewees have been to the ESPN Wide World of Sports Complex. One user felt that the complex is cost prohibitive because even spectators have to pay to watch. The Northwest Recreation Complex in Apopka was also mentioned as a quality facility in the Orlando area for soccer events.
- *Lakewood Ranch, FL* - Opinions varied on this complex. One interviewee felt that the complex has no local infrastructure/amenities and noted that the parking lots were muddy. Another interviewee liked the size of the complex suggesting they are able to meet demand.
- *Sarasota, FL* - Several users noted that the Sarasota area has several facilities available, including Nathan Benderson Park for rowing events and Twin Lakes Park for baseball and other sports.



KEY FINDINGS (CONT.)

LEE COUNTY SPORTS:

- *Most successful* -
 - Interviewees have inferred that baseball and softball are perhaps the most successful sports in Lee County, but the demand is so high that they continue to have a lot of growth potential.
 - Although they have not been a large focus of Sports Development due to the lack of tournament-caliber facilities, one local stakeholder felt that “basketball and volleyball have been better served by the school board than any other sports.”
- *Most potential* -
 - Several interviewees felt basketball is underserved in Lee County from a tournament/event standpoint and cited the lack of adequate facilities for hosting basketball tournaments.
 - “I would say football and soccer. If you build the fields for soccer they’re going to come.”
 - “I would think a big multi-use field complex could accommodate a lot of underserved sports.”
 - “There are more lacrosse teams popping up every year.”



SECTION 7 EVENT INTERVIEW SUMMARY



EVENT INTERVIEWS



In November/December 2016, Victus Advisors held twenty-five (25) telephone interviews with sports event organizers and operators locally, regionally and nationally including:

- Matthew Libber, Elite Tournaments
- Don Flynn, Game Day USA
- AJ Joseph, HP Volleyball
- Chris Zukas, USA Diving
- Trent Carter, Madlax
- Steve Bishop, USA Volleyball - Florida
- Dan Wood, Spring Break Lax
- Pete Isaias, USA Wrestling
- Jim Giunta, National Collegiate Wrestling
- Mike Cavanaugh, USA Team Handball
- Karen Parrish, USA Pickleball Assoc.
- Ashley Bratcher, USA Baseball
- Byron Hicks, USA Ultimate
- Corinne Shigemoto, USA Judo
- Franklin Culbreth, National Softball Assoc.
- Aaron Braithwaite, Prospect Select Baseball
- Tim Keckler, Lightning Gymnastics
- Matt Weingardt, USA Track & Field
- Jonathan Strauss, International Distance Skateboard Assoc.
- Terry Hennessey, Senior Softball
- Steve Hassett, USSSA Baseball - Florida
- Lee Parks, US Sailing
- Michael Zellner, International Shuffleboard Assoc.
- Kevin Couture, USA Hockey
- Dean Ekeren, USA Swimming



EVENT INTERVIEW TOPICS

The overall goal of these interviews was to understand event organizers past experience in hosting sports tourism events in Lee County (if any) and to identify which factors are most important in deciding whether or not to host events in Lee County in future years, including:

- Perceptions of Lee County's current amateur sports facilities
- Local support for sports events in Lee County (County/Sports Development support, hotels, amenities, access, etc.)
- Demand for new facilities in Lee County to accommodate their needs



KEY FINDINGS: EVENT INTERVIEWS

LEE COUNTY'S CURRENT AMATEUR SPORTS FACILITIES:

- *Gymnastics* - One user indicated that the Harborside Events Center was one of their favorite venues citing its proximity to the beach, restaurants, and hotels. They had previously used the Lee County Civic Center which they didn't like, mentioning it was "dirty".
- *Swimming* - One event organizer mentioned that they would love to host more events in Lee County, but that there are no suitable pools. Furthermore getting access to the FGCU Aquatics Center is challenging.
- *Volleyball* - One user hosts volleyball events on the beach, and indicated the last indoor event they held in Lee County was over 15 years ago. Currently they are not aware of any adequate indoor facilities in the County for their events.
- *Softball* - One softball event organizer recognized CenturyLink Sports Complex as the best softball facility in Lee County for their events. He also mentioned that the Northwest Softball Complex and the Cape Coral Softball Complex were "pretty good".
- *Baseball* - One baseball user was very satisfied with all the fields in Lee County and feels they are just as good as any in the country. He suggested adding turf fields.
- *Lacrosse* - One lacrosse event organizer recently used the Kelly Road Soccer Complex for a tournament and felt the field set-up was awkward and outdated. Additionally he was concerned that the local soccer club "had the final say with logistics" and that they didn't open concessions.



KEY FINDINGS (CONT.)

LOCAL SUPPORT FOR SPORTS EVENTS IN LEE COUNTY:

- The majority of event organizers we interviewed spoke very highly of working with Lee County Sports Development to facilitate their events. Many specifically named Jeff Mielke and Gary Ewen as helpful contacts, and lauded them for being great to work with.
 - “One of the best we work with in the nation.”
 - “Very responsive and supportive.”
 - “On top of hotel situation.”
- The following points were recurring themes with event organizers in what they expected from groups such as Lee County’s Sports Development and Parks & Recreation departments:
 - A CVB that can connect organizers with local businesses and recommend hotels, restaurants, etc.
 - Incentives for organizers for hitting room night goals, etc.
 - Discounts on room rates
 - Provide grants or financial assistance for first time events in Lee County
 - Help with promoting and marketing events
 - Aligned vision and collaboration between Sports Development, Parks & Recreation, and other facility operators
 - Ease of access (airport, hotels, highways)
 - Guaranteed dates at venues ahead of time



KEY FINDINGS (CONT.)

DEMAND FOR NEW FACILITIES:

- *Lacrosse* - Most lacrosse event organizers agree that a multi-use field complex with an eight (8) field minimum would be ideal for tournaments. One reiterated the need for access without having constraints from other users (i.e. soccer clubs). All event organizers we spoke to foresaw hosting tournaments in Lee County, with up to 70 teams per tournament (about 1,400 athletes).
- *Softball* - One event organizer feels that a few more (did not quantify) fields at the BMX/Strausser Complex would be ideal and they could add at least 25 more teams to their winter event.
- *Swimming* - USA Swimming would be interested in hosting a sectional tournament once a year over a four day period with the right facility. That facility would at least be a 50 meter pool with spectator seating for 1,500. Additional needs would be a warm-up pool and deck space for 1,000 swimmers. They could envision a Lee County event bringing up to 800 athletes and more than 1,600 spectators with a suitable facility.
- *Baseball* - A few event organizers suggested implementing more artificial turf fields and having more fields that are adaptable for both youth baseball and girls softball.
- *Wrestling* - Two event organizers indicated that a convention center would be most suitable for their events. For major events, there would need to be enough floor space for 12 wrestling mats. One organizer would be interested in bringing a conference championship in the month of February, if Lee County had a suitable facility. That event could bring in 22-24 teams and over 400 participants. Another organizer would like to bring in an event over Memorial Day Weekend and would anticipate up to 1,200 athletes, if Lee County had a suitable facility.



KEY FINDINGS (CONT.)

DEMAND FOR NEW FACILITIES:

- *Volleyball* - A volleyball event organizer feels that an indoor event center facility with a minimum of nine courts and a 30 foot ceiling would be sufficient for a regional tournament event.
- *Diving* - USA Diving would be interested in hosting a national event in Lee County. Their needs for an adequate facility would principally be diving boards ranging from one meter spring boards up to 10 meter platforms. They project an event in Lee County would last up to two weeks and bring in about 800 athletes. Furthermore they project about 10,000 room nights for the event.
- *Pickleball* - An indoor facility (about 90,000 sq. ft.) with room for up to 30 courts would be ideal for pickleball events according to one event organizer. The type of floor would not matter, stating that basketball flooring would be fine. An event in Lee County could bring in about 500 participants.
- *Team Handball* - An event organizer stated that an indoor facility with space for four (4), 20-meter by 40-meter courts would be ideal to host event. Additionally Sport Court flooring would be required. The organizer would be interested in hosting an open championship over three days in May. They project the event to book 600-650 room nights, and bring in up to 500 athletes.
- *Track & Field* - USA Track & Field would need a track complex that has lights at night and an oval infield large enough to host field events. They would be interested in hosting their Masters Outdoor Championships (Ages 40 and over) in July. They would project over 3,000 participants.
- *Ultimate Frisbee* - The event organizer would need a multi-use field with up to 3,000 seats for spectators. He would be interested in hosting a club championship with 1,200 athletes and 3,500 total visitors over a four day period.



SECTION 8 SURVEY RESULTS



ONLINE SURVEYS - LOCAL SPORTS PARTICIPANTS



In addition to meetings and interviews, in November 2016, Victus Advisors also conducted online surveys with 341 local parents, participants, coaches, and other such members of the amateur sports community in the Lee County area.

Survey topics included:

- General demographic information
- Sports and recreation facilities frequented in the Lee County area
- General attitudes toward amateur sports in Lee County
- Ideal features of amateur sports host cities and facilities

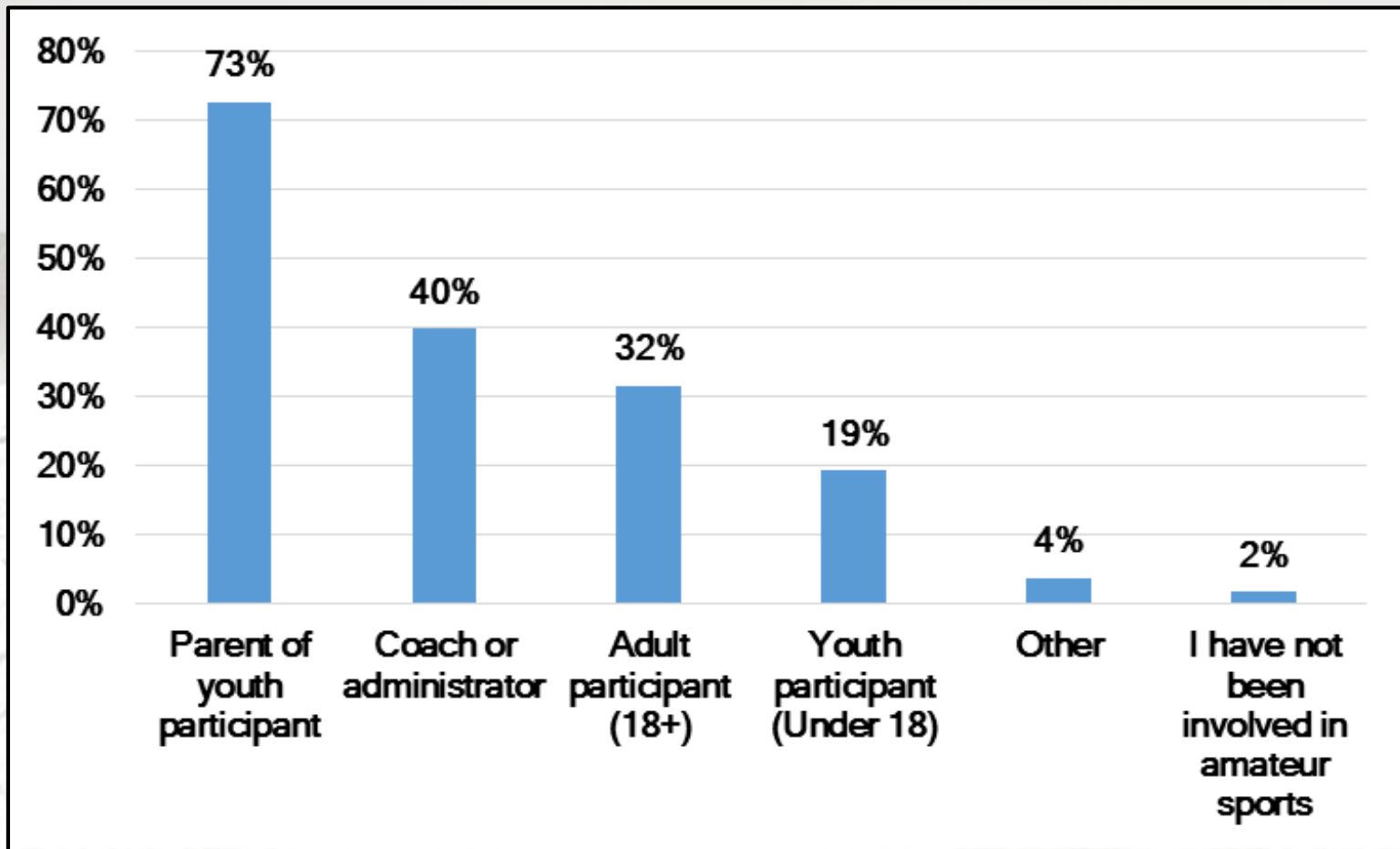


SURVEY RESPONDENT PROFILE

- 51% Male, 49% Female
- 93% between the ages of 25 and 64
 - 48% age 25 to 44, 45% age 45 to 64
- 86% White, 7% Hispanic, 3% Multiracial, 2% Black, 1% Asian
- Median Household Income: \$75,000 - \$100,000
- 85% live in a household with children under 18
 - Median # of children in household: 2
- 93% live in a household where at least one member has participated in Lee County amateur sports



AMATEUR SPORTS PARTICIPATION (BY ROLE)

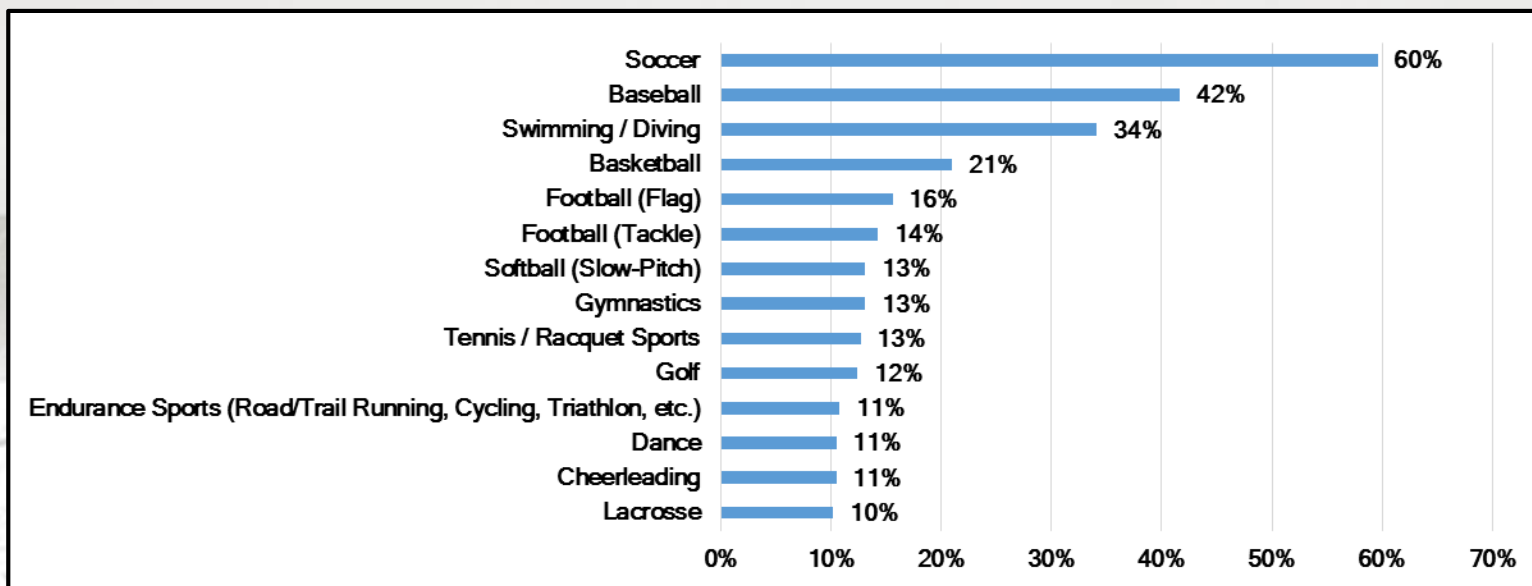


Note: Sorted by Role score in descending order

73% of the respondents were parents of youth sports participants, and more than 30% were coaches or adult sports participants.



AMATEUR SPORTS PARTICIPATION (BY SPORT)



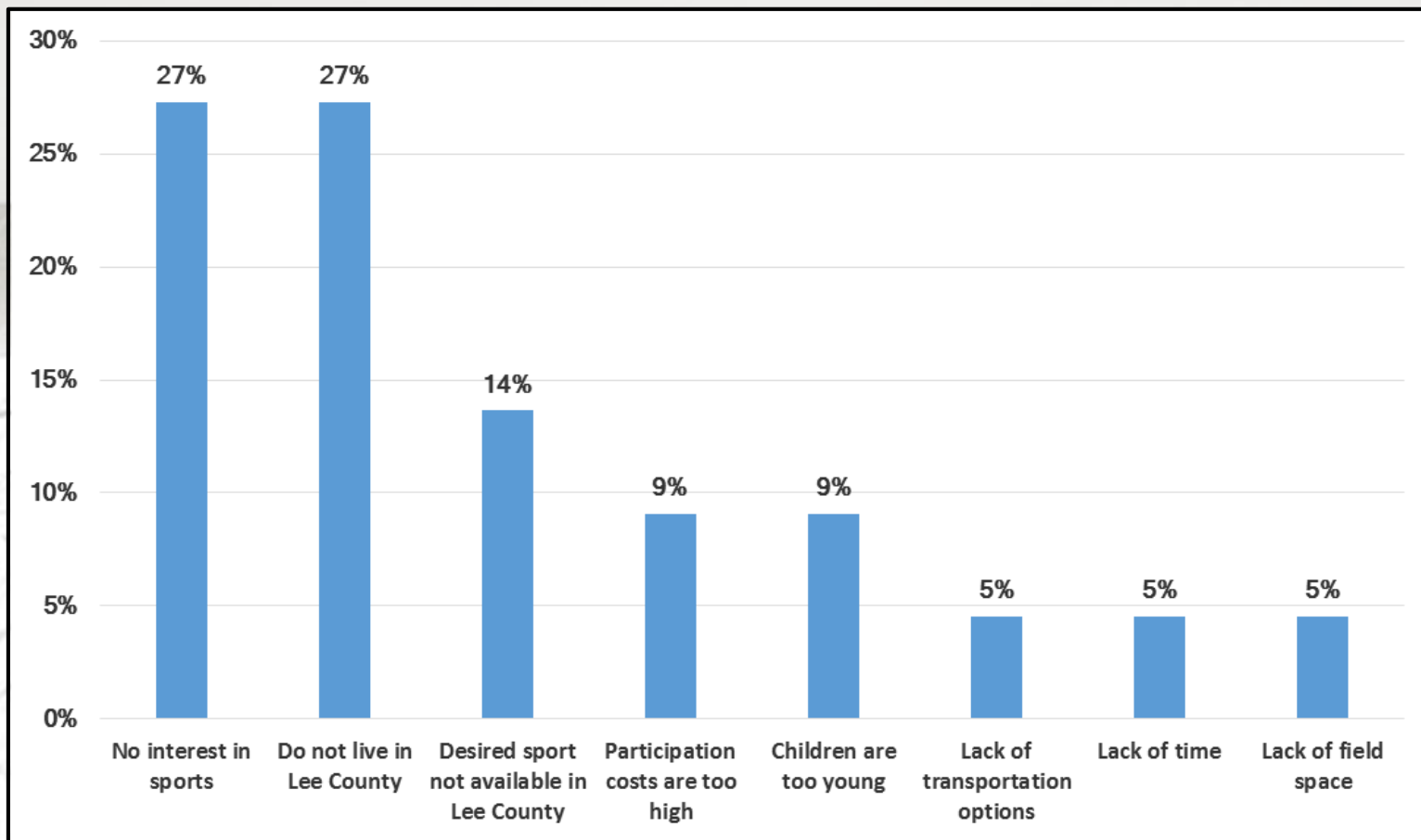
Note: Sorted by Sport score in descending order

Soccer, Baseball, Swimming/Diving, and Basketball were the sports that survey respondents were most involved with in Lee County. There is a noticeable difference between the local popularity/participation of soccer in Lee County and the minimal amount of soccer sports tourism events held in the County (as shown in previous sections).



NON SPORTS PARTICIPANTS IN LEE COUNTY

Primary reason for lack of participation in sports community (approx. 7% of respondents):



Note: Sorted by reason in descending order

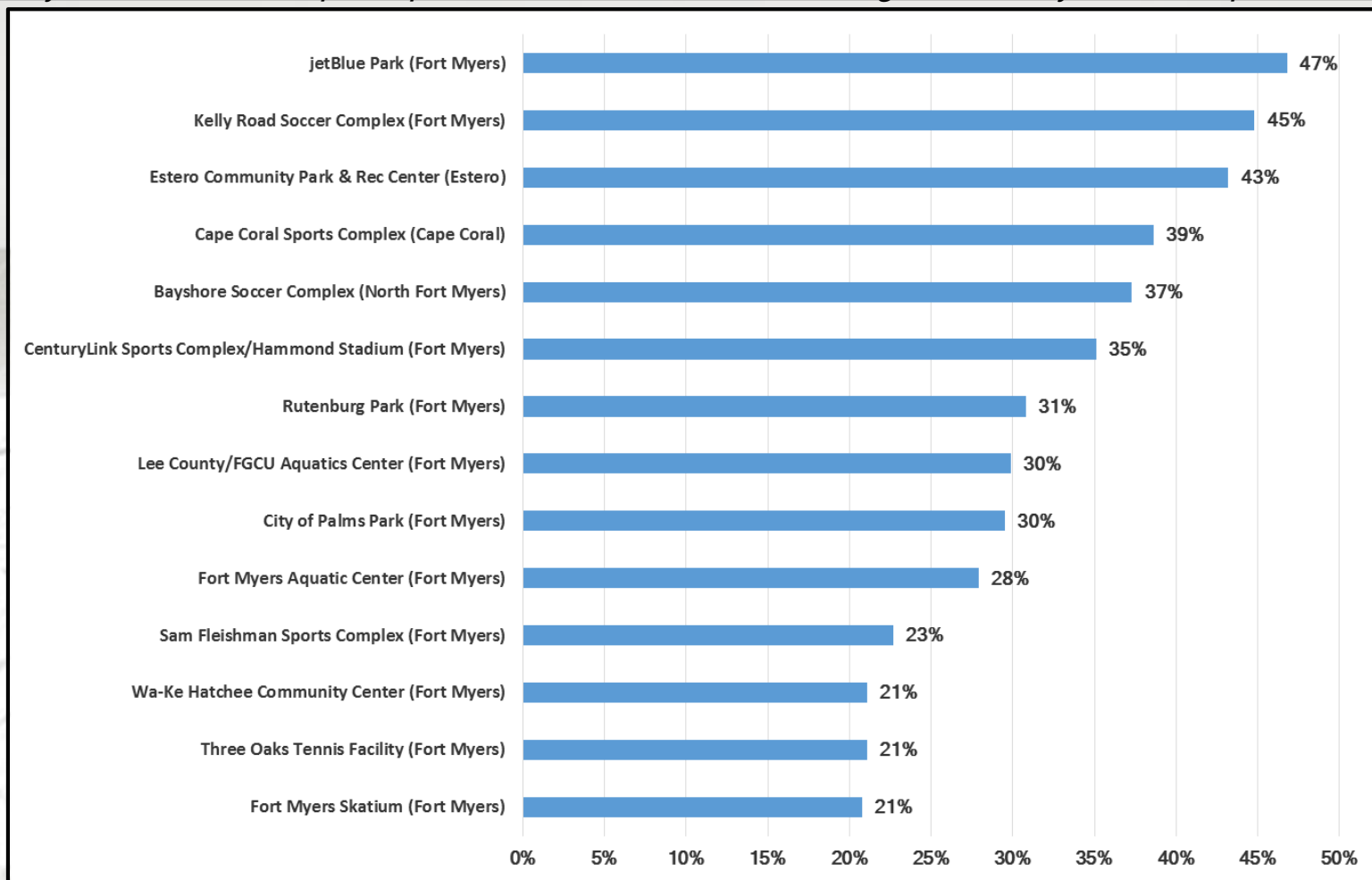
Sample Size: 22 respondents

Out of the respondents that have not participated in sports in Lee County, **No interest in sports** and **Do not live in Lee County** were the primary reasons.



LEE COUNTY SPORTS FACILITIES

Have you ever attended/participated at an event at the following Lee County amateur sports facilities?



Note: (1) Sorted by Sports Facility score in descending order

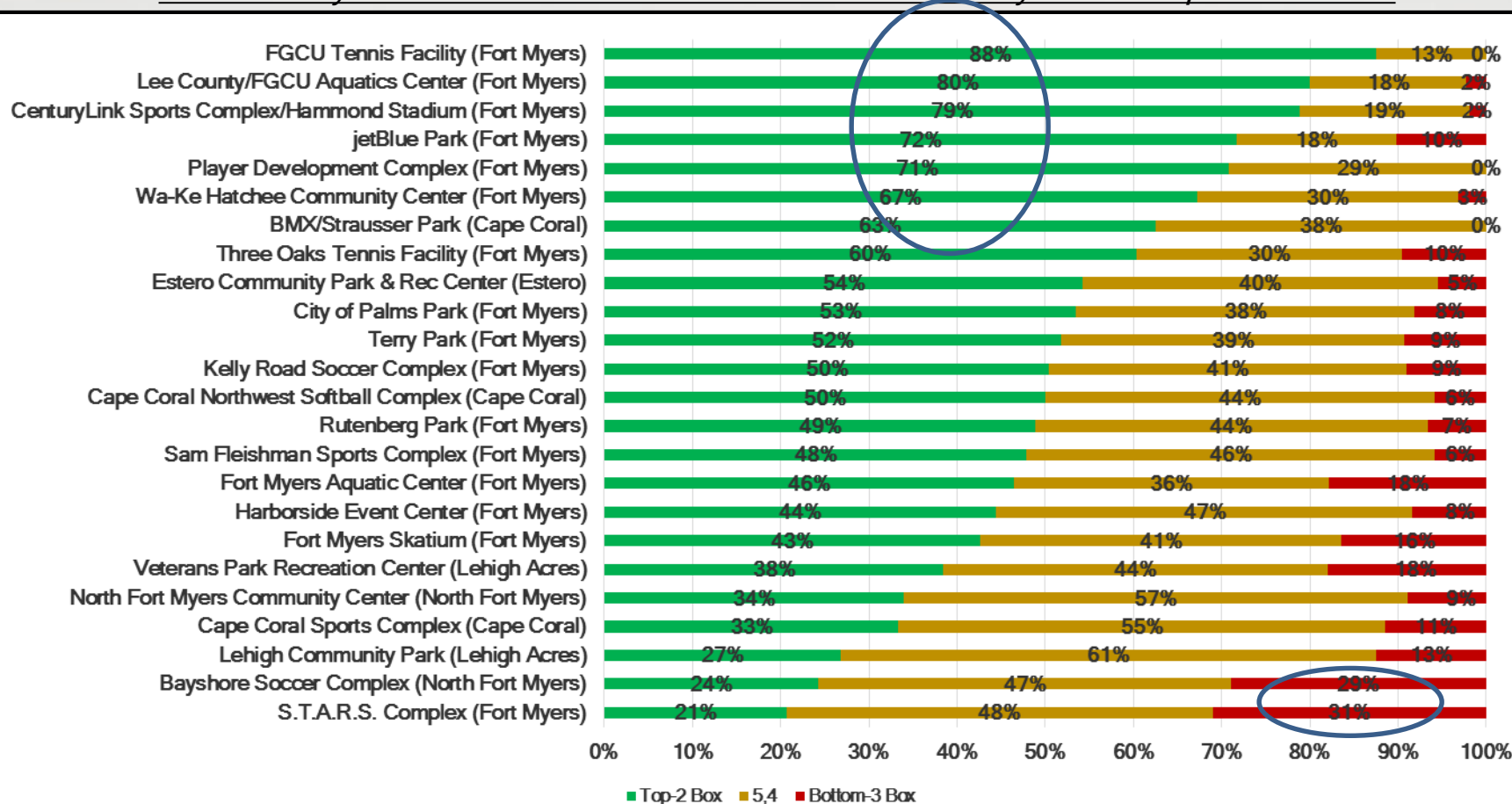
(2) Only facilities that were visited by more than 20% of respondents were listed

jetBlue Park, Kelly Road Soccer Complex, and the Estero Community Park & Rec Center were cited as the venues most visited in the County.



OVERALL SATISFACTION

Please rate your overall satisfaction with various Lee County amateur sports facilities:



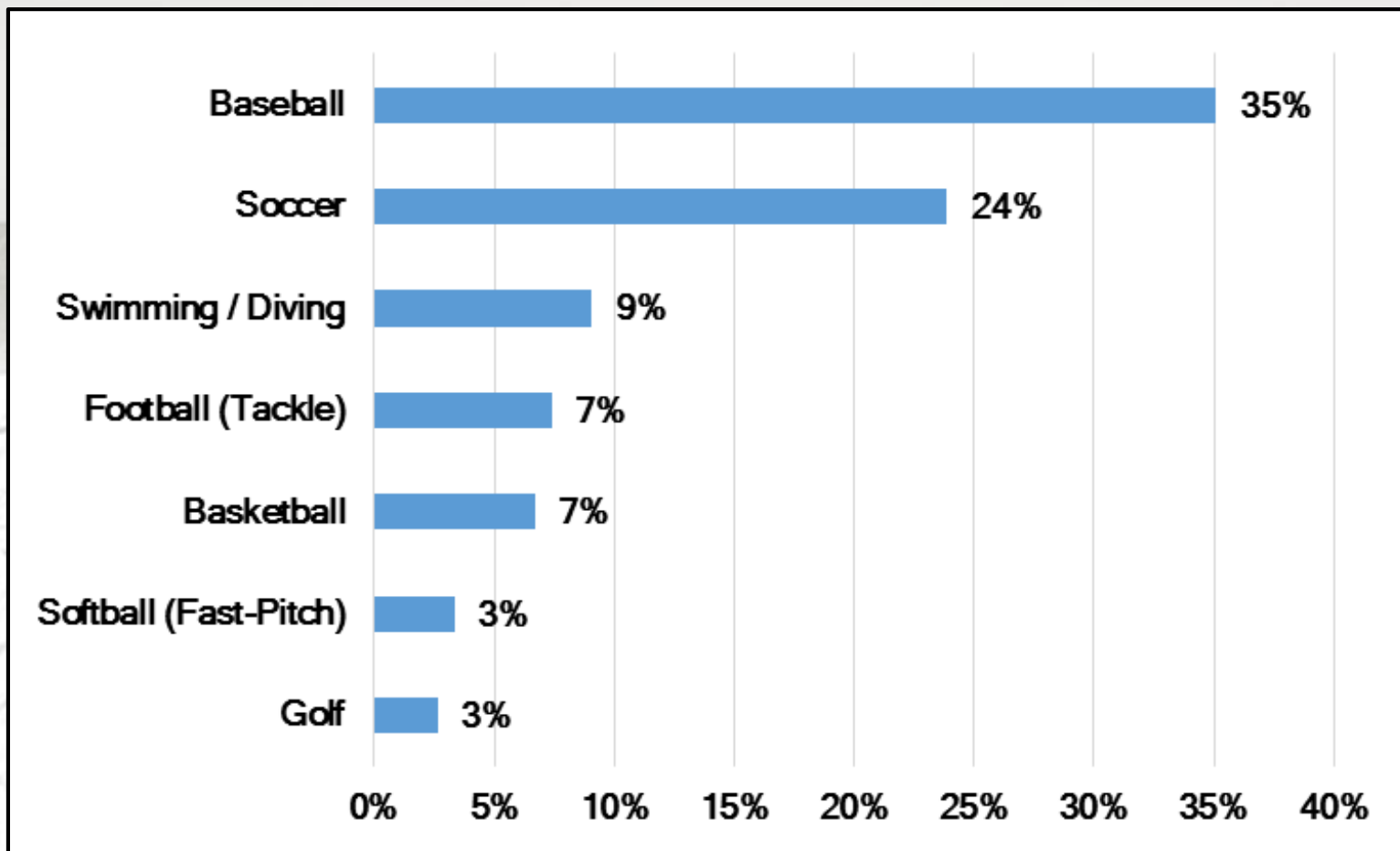
Note: Sorted by Top-2 Box score in descending order

FGCU Tennis Facility received the highest satisfaction rating, with the **FGCU Aquatics Center** and the **CenturyLink Sports Complex/Hammond Stadium** the second and third highest rated, respectively. It is also worth noting the **Bayshore Soccer Complex** and **S.T.A.R.S. Complex** received the worst ratings.



LOCAL AMATEUR SPORTS COMMUNITY

Which established sports have been developed most successfully in Lee County?



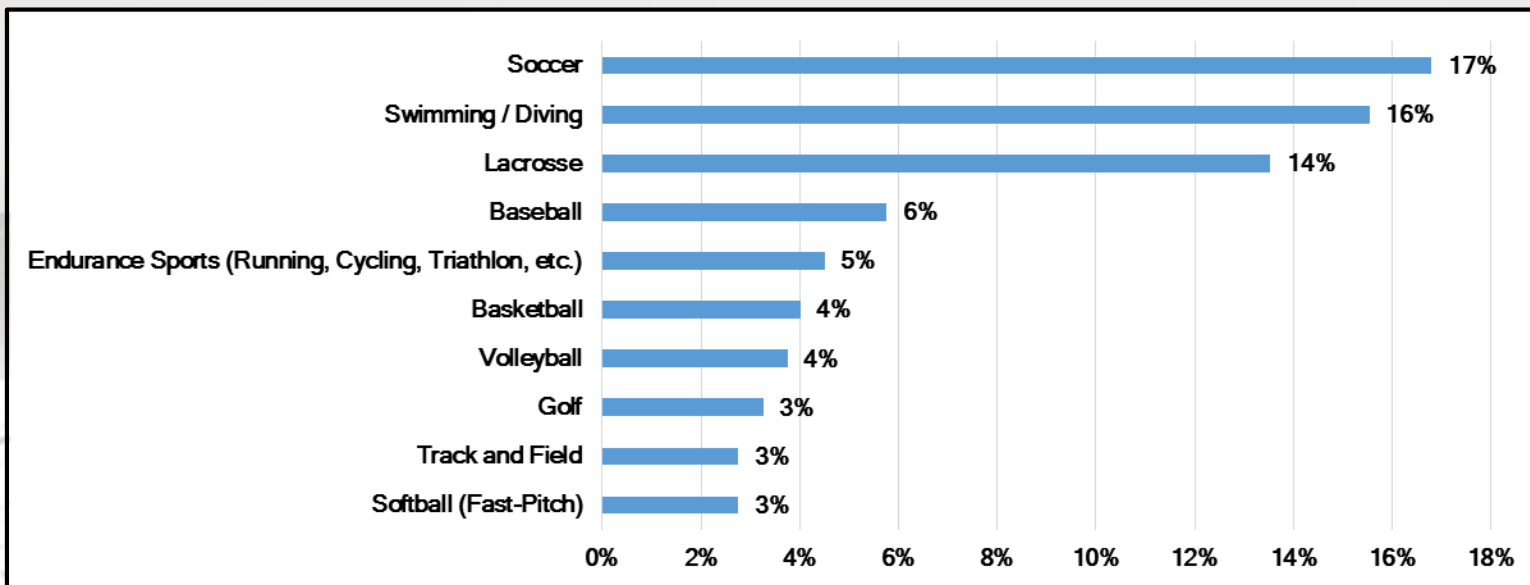
Note: Sorted by Sports score in descending order

Baseball was identified as the most developed sports in Lee County. **Soccer** was also identified as more developed than other sports.



LOCAL AMATEUR SPORTS POTENTIAL

Which emerging or underserved sports have the most potential in Lee County?



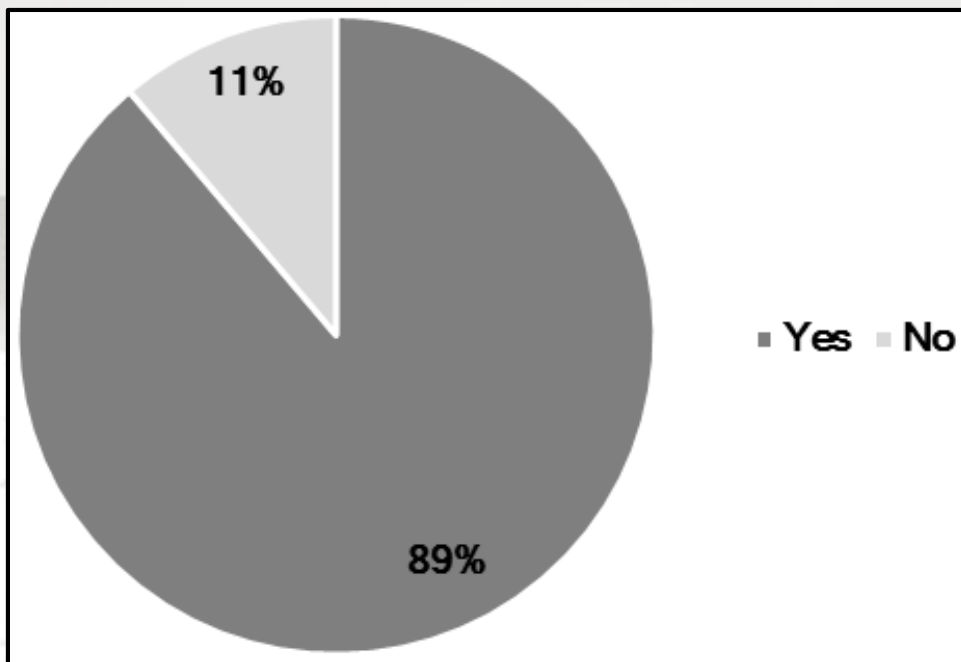
Note: Sorted by Sports score in descending order

Soccer, Swimming / Diving, and Lacrosse were identified as the sports with most potential in Lee County. As participation and interest increases over time, more facilities will need to be available to meet demand.



AMATEUR SPORTS TRAVEL

Have you ever traveled outside of Lee County for an amateur sports event?



89% of respondents have traveled outside of Lee County for amateur sports. Soccer and swim meets were the most mentioned amateur sports tourism events, and Sarasota, Naples, and Orlando were the communities most visited.



BEST AMATEUR SPORTS DESTINATION

City	% Chosen as Best
Orlando	25%
Fort Myers	10%
Sarasota	9%
Naples	7%
Lakewood Ranch	3%



Reason for Choosing Best Facility	Percent Chosen
Quality of sports facilities	61%
Community interest/support for amateur sports events	11%
Nearby hotel/lodging options	9%
Accessibility (ease of travel/transportation access)	6%
Nearby family entertainment options	5%
Quantity of sports facilities	3%
Other	3%
Climate/weather	2%
Only familiar with Lee County	2%

25% of respondents chose **Orlando** as the city that does the best overall job as an amateur sports host.

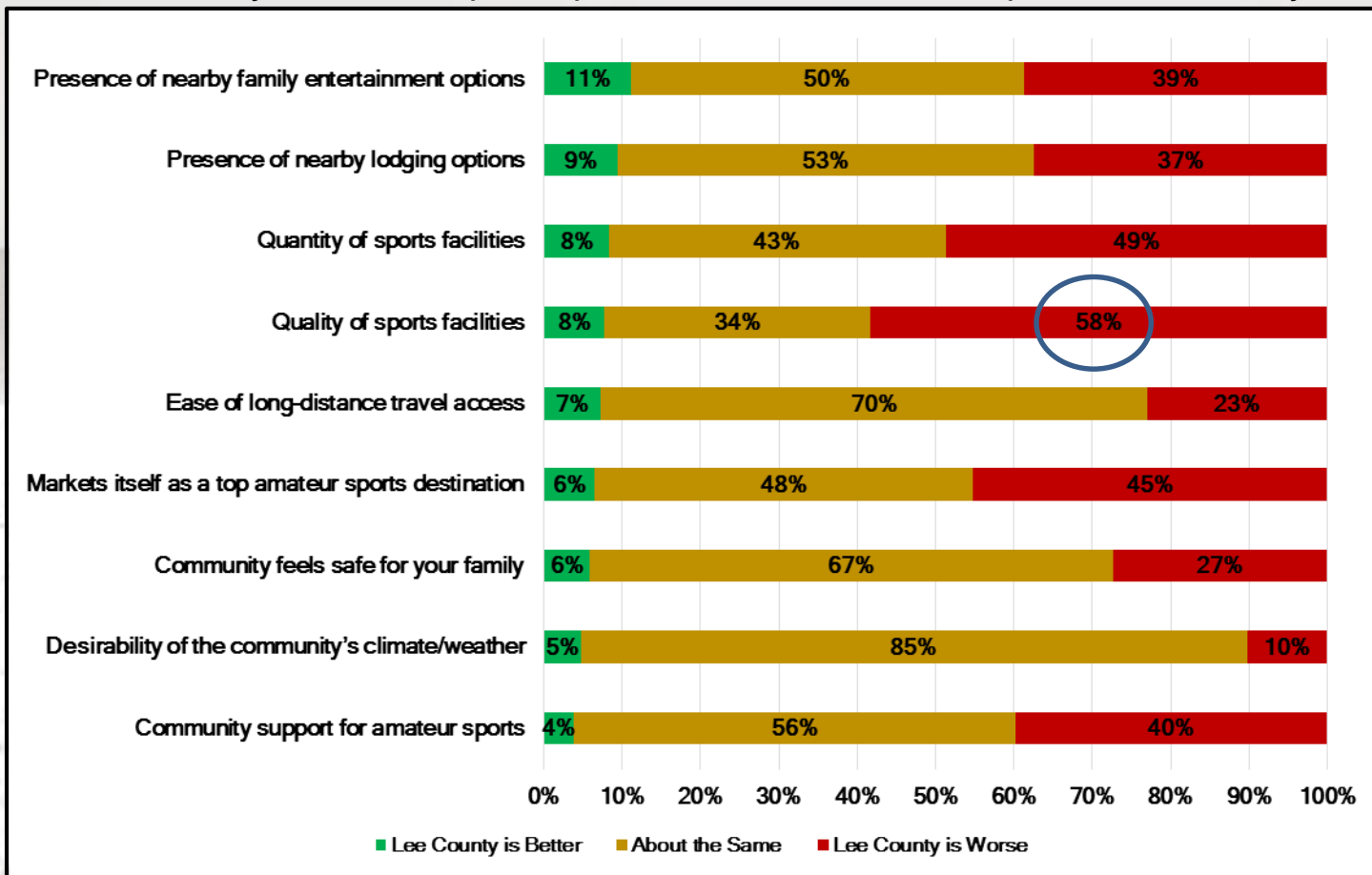
61% of respondents cited **Quality of sports facilities** as the primary reason in determining the best overall job as an amateur host.

This finding that the #1 factor is providing a high-quality sports facility is consistent with Victus Advisors' findings on similar projects across the country.



SPORTS DESTINATION COMPARISON

How does your most frequent sports travel destination compare to Lee County?



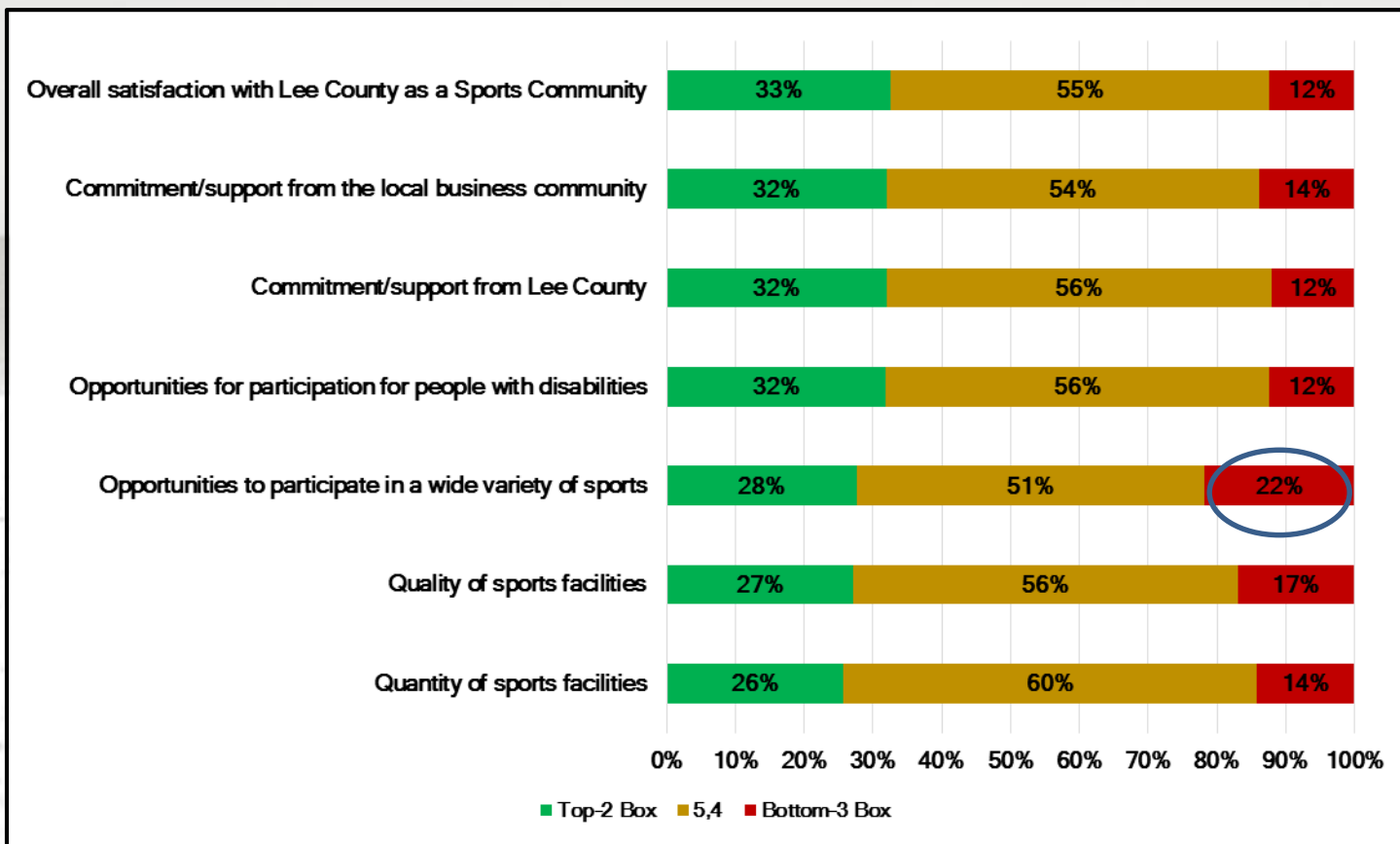
Note: Sorted by Lee County is Better score in descending order

Overall, most respondents felt that the sports community and sports destination experience in Lee County were on par with other premier sports tourism destinations in Florida. However, nearly 60% of respondents felt that the overall **Quality of sports facilities** in Lee County was lacking relative to competitive markets.



OVERALL IMPRESSIONS

Please rate your overall impressions of the Lee County amateur sports community:



Note: Sorted by Top-2 Box score in descending order

Overall Impressions of the Lee County sports community are relatively average. The biggest negative factor is a perceived lack of **Opportunities to participate in a wide variety of sports**, which reflects some of the interview/focus group feedback we received regarding the County's track record with baseball-related sports tourism.



OPEN-ENDED FEEDBACK FROM RESPONDENTS



Potential Positives:

- “Lee County Sports Development staff have been great to work with and we enjoy bringing large events to Lee County because of the hospitality and good working relationship. Additional softball fields would provide a great location for USA Softball of Florida to hold additional championships.”
- “It would be nice to have a central facility that sporting events could be held: swimming, baseball, softball, basketball, soccer etc.”
- “Thanks for the commitment to sports. Please continue to improve and update facilities to attract the most desirable events.”
- “Adult baseball within the Lee County community is underrated in it's ability to generate money and tax dollars. Access to more fields for adult baseball should be prioritized.”
- “The grounds crew for Hammond, JetBlue and Terry Park deserve MAJOR raises!!! Those guys do such an amazing job and work very long hours!”



OPEN-ENDED FEEDBACK (CONT.)

Potential Negatives:

- “Unlock fields and let the kids practice. Little Leagues keep people from learning the game by locking its fields.”
- “I believe the lightning detectors are too strict. We've had storms pass through and still be delayed if lightning strikes 9.9 miles away although the danger has passed.”
- “I would like to see the availability of baseball fields for adult baseball leagues increase. I feel like Lee County does not allow for adult use of all of the baseball facilities that the county has to offer.”
- “Never in my life have I lived in, nor heard of a town that doesn't have their own Little League and Pop Warner leagues. The facilities for children in The Village of Estero are non existent. Being an ex NCAA Division 1 athlete, I'm thoroughly disappointed.”
- “Most of the bathrooms (at sports facilities around the County) are lacking and poorly taken care of.”



OPEN-ENDED FEEDBACK (CONT.)

Other Sports Opportunities:

- “There desperately needs to be an indoor swim facility. The Tampa/Clearwater area has several of these facilities and it generates a substantial income from hosting swim meets.”
- “Lee County needs to support all sports and also try to grow emerging sports like Lacrosse, Field Hockey & girls sports. Lacrosse can bring a lot of money to the county. Collier County hosts numerous lacrosse tournaments yearly which bring in teams (thousands of players & families) from all over the country to Naples to spend their money and ultimately vacation.”
- “Swimming pools must be updated and new pools built. A 50 meter pool in downtown Fort Myers area or in Cape Coral is a must. FGCU has a 50 meter pool. The next closest 50 meter pool is Naples or Sarasota.”
- “There are other sports besides football, basketball and baseball that can also help our youth. Fencing is one of those, it helps kids to develop their concentration while being a member of a team or club.”



SECTION 9

MARKET OPPORTUNITIES & FACILITY RECOMMENDATIONS



LEE COUNTY STRENGTHS & WEAKNESSES



Key Strengths of the Lee County Sports Tourism Market:

- As shown in Section 3 of this report, Lee County's greatest existing strength in sports tourism is in hosting baseball events, most of which are occurring during the summer months.
 - Baseball and softball events accounted for over 50% of Lee County's Sports Tourism events for 2015 and had an estimated economic impact of \$77 million.
 - At 111,000 room nights, baseball and softball events accounted for 73% of total room nights booked in Lee County for sports tourism in 2015.
- Most local sports stakeholders and event interviewees spoke very highly of the Lee County Sports Development team, and felt that they were among the best to work with in the nation.
- Lee County's policy of minimal facility rent charged to sports tourism events, as well as the County's relatively affordable lodging rates in the summer months, also make the County a more desirable sports tourism destination for outdoor sports.



LEE COUNTY STRENGTHS & WEAKNESSES (CONT.)



Potential Weaknesses of the Lee County Sports Tourism Market:

- Although current baseball activity is very strong for teens and adults, demand continues to grow for baseball events of all ages, and it could benefit the County to diversify it's focus additionally on youth baseball (8-12 years old) and girls softball.
- Baseball/softball fields are relatively fragmented throughout the County, with no single complex that can accommodate 8+ fields for tournament use.
- There appears to be significantly unmet facility demand for soccer and other field sports (non-baseball/softball). The lack of high-quality soccer fields and limited access to multi-use fields has been frustrating for local stakeholders and tournament operators alike.
- Many users cited several flaws with existing aquatic centers in the County that prevent the County from attracting larger regional/national swimming events.
- There is significant seasonality in the County's amateur sports tourism schedule, with December through April showing the lowest activity levels. A key factor in terms of missed sports tourism opportunities in the winter and early spring is the lack of indoor, tournament-caliber facilities in the County (for basketball, volleyball, swimming, etc.).



FACILITY PRIORITY #1: BASEBALL/SOFTBALL FIELDS

RECOMMENDATION:

IMMEDIATE NEED

- Lee County should both capitalize on the growing demand for baseball events, and diversify it's mix of baseball for all ages and girls softball, by pursuing options to either expand or construct more fields.
- In order to provide a more convenient and desirable experience for tournament operators and give Sports Development an additional competitive advantage, field expansion should focus on providing clusters of 8+ fields by type within a single location.
- Key opportunities include adding lights to the existing five (5) fields at the Player Development Complex, expanding the Player Development Complex by adding three (3) additional lighted teen/adult baseball diamonds (creating eight lit teen/adult baseball diamonds in total), and adding additional (at least eight) lit diamonds on nearby/adjacent land that could accommodate both girls softball and little league baseball.

RATIONALE:

- Lee County has established a nationwide reputation as a premier destination for teen and adult baseball, and field/tournament demand for youth baseball (8-12 years of age) and girls softball in Lee County is rapidly increasing.
- Baseball field inventory is fragmented across the County, with no single facility able to provide 8+ fields in one location, requiring tournament operators to piece together fields.



FACILITY PRIORITY #2: MULTI-USE FIELD COMPLEX

IMMEDIATE NEED

RECOMMENDATION:

- Lee County should consider the development of a complex that includes at least eight (8) tournament-caliber, lighted, multi-use fields. The primary demand for these fields would be soccer, however increased field access could help grow other field sports opportunities as well (such as lacrosse and rugby).
- Key components of this complex should also include a flexible field layout so other sports may use the complex (football, lacrosse, rugby, etc.), field lights, concessions, bathrooms, administrative offices, etc.

RATIONALE:

- Soccer is the most popular local sport in Lee County by participation, however both the inventory and quality of soccer fields is significantly lacking.
- Soccer tournament activity has been relatively low in Lee County due in large part to the lack of a tournament-caliber complex.
- Soccer and lacrosse were identified by the local sports community as the two sports with the most potential for growth in the County.



FACILITY PRIORITY #3: INDOOR SPORTS OPPORTUNITIES

RECOMMENDATION:

LONG-TERM OPPORTUNITY

- Lee County should consider the long-term development of indoor, tournament-caliber sports facilities to balance the seasonality of the County's current sports tourism calendar, reduce their overall dependency on baseball as the major driver of sports tourism, and provide incremental economic impact in the winter and early spring. Potential long-term options could include:
 - ***Multi-purpose, indoor sports center*** for use by currently underserved indoor sports (such as basketball, volleyball, gymnastics, wrestling) with space for up to eight basketball courts (convertible to eight to 12 volleyball courts).
 - ***Aquatic center*** capable of hosting regional/national swim meets year-round. However, it should be noted that indoor aquatic centers are among the most expensive amateur sports facilities to build and operate. Therefore, it may be more financially prudent to consider potential expansion options to the FGCU Aquatics Center that could help attract larger meets (expanded spectator seating, sun shades, and more deck space).
 - Whether these facilities are developed as public facilities, or as mutually beneficial public-private partnerships, it is important that Lee County Sports Development has the ability to offer ***rent-free access*** to these facilities in order attract sports tourism events, as this unique approach is a key competitive advantage for Lee County sports tourism.

RATIONALE:

- Victus found that indoor, multi-court facilities are significantly lacking in the County.
- Seasonality of amateur sports tourism in Lee County is heavily skewed towards summer baseball events.



FACILITY DESIGN & PROGRAMMING INSIGHTS



Each of our recommended facility priorities should also be considered from a design and programming standpoint:

Priority #1: Baseball/Softball Fields -

- *Design* - Gathering feedback from user groups and design professionals on appropriate amenities (locker rooms, batting cages, warm-up areas, administrative space, etc.) will be critical to the eventual marketability of the facility. Design professionals should benchmark other best-in-class baseball/softball facilities to ensure that any expanded/new Lee County facility is at the front end of current design trends.
- *Programming* - Lee County Sports Development should ensure an appropriate diversity of client mix within each sport and age group via business planning that includes both long-term usage agreements and measurement of on-going success metrics to ensure accountability.

Priority #2: Multi-use Field Complex -

- *Design* - Due to increasing regional/in-State competition, design professional must strongly consider facility amenities and features that could differentiate the destination with a focus on customer satisfaction for athletes, spectators and administrators. The ultimate design should also provide maximum flexibility for a wide variety of sports and age groups (dimensions that can accommodate various usage needs, small-sided field layouts, etc.).
- *Programming* - Prior to capital funding, we recommend that Sports Development should begin discussions with potential anchor clients/events in order to protect the County's financial investment. It is also important to ensure that the facility's event calendar balances sports tourism with local sports usage and provides park space for citizens with active lifestyles.



Each of our recommended facility priorities should also be considered from a design and programming standpoint:

Priority #3: Multi-use Indoor Sports Venue -

- *Design* - Indoor sports space offers tremendous flexibility in design, amenities, and level of finish, and therefore a wide range of potential costs in terms of design and construction. Indoor space design decisions should be driven by a programming plan that reflects both sports tourism revenue modeling and local sports community access. As mentioned with outdoor field complexes on the previous page, indoor sports venue designers should also gather appropriate feedback from user groups to ensure marketability of the facility, and benchmark other best-in-class indoor facilities to ensure Lee County is at the front end of sports center design trends.
- *Programming* - Indoor sports space can often be the most highly-optimized sports space due to the variety of sports activity that can be hosted on flat sports flooring surfaces. However, ensuring balance between local use (e.g. practices and league play) and sports tourism-focused programming must be considered in creating the operating proforma. A well-planned facility should ensure that the appropriate diversity of local, regional, and national sport usage is balanced by business operations modeling and planning that includes both long-term usage agreements and measurement of on-going success metrics to ensure accountability.



Each of our recommended facility priorities should also be considered from a design and programming standpoint:

Additional Priority for All Venues: Modern Technology for All Lee County Sports Tourism Venues -

- Another core component to maintaining Lee County's competitive positioning in the sports tourism marketplace is venue technology. For all Lee County sports tourism venues, it is important that they be kept up-to-date in terms of technological features that make the facilities more attractive to event organizers, participants, and families, including free WiFi access at all facilities, modern sound systems and video displays, plug and play live streaming solutions, and digital marketing interactivity via Facebook, Instagram, etc.



Future Facility Expansion Opportunities -

- Victus Advisors' research found that youth baseball, softball, soccer, and lacrosse are among the underserved sports in Lee County, and thus it is likely that facility expansion for these sports would drive additional local participation in sports programs and eventually increased demand for hosting local/regional tournaments and events. Therefore, it is recommended that Lee County should look to develop these new baseball, softball, soccer, and multi-use fields in locations that have additional adjacent land available for potential future expansion as participation and demand increases.
- When it comes to potential future Lee County sports facility expansion decisions (10+ years), it is likely that the following three (3) key factors will determine the need for and size of those expansion opportunities:
 - Local/regional population growth.
 - Increased interest in Lee County's core sports (primarily baseball, softball, soccer, lacrosse).
 - The competitive sports tourism landscape in Florida, both in terms of competitive facility inventories and financial/operational competitiveness (e.g. rental rates, incentives, grants, etc.).



NATIONAL AMATEUR SPORTS TRENDS

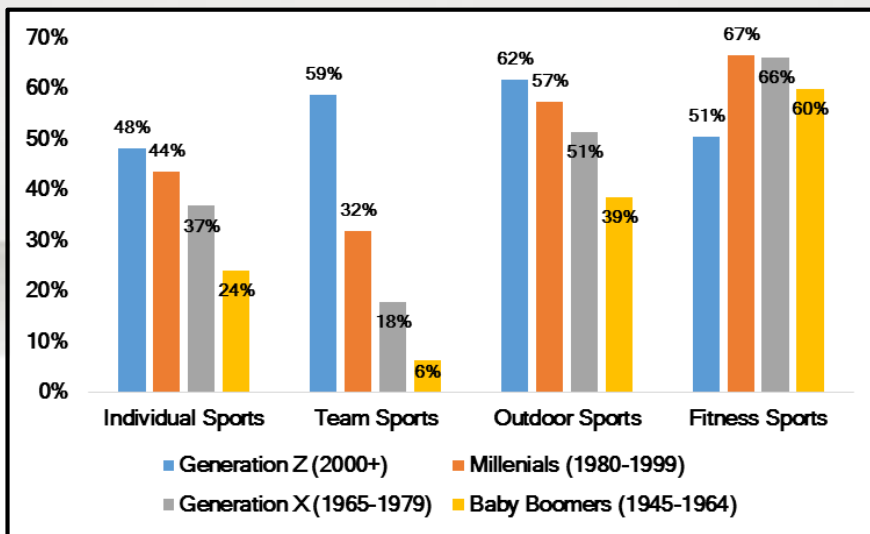
U.S. Youth Team Sports Participation

Sport	Participants
Soccer (Outdoor + Indoor)	9,828,000
Basketball	9,694,000
Baseball + Fast-Pitch Softball	8,333,000
Football (Tackle)	3,254,000
Gymnastics	2,809,000
Volleyball	2,680,000
Football (Touch)	2,032,000
Slow-Pitch Softball	1,004,000
Wrestling	805,000
Lacrosse	804,000
Rugby	301,000

Note 1: Sorted by Participants / Note 2: Ages 6+ Source: 2015 SFIA U.S. Trends in Team Sports Report

Nationally, youth participation in football (both tackle and touch) has decreased considerably in the past decade. Soccer is now the most popular youth team sport. Baseball/softball also continue to be popular. However, as has been cited by various users and survey respondents, lacrosse and other field sports (such as rugby) are growing, and access to more fields in Lee County could increase the potential for those sports.

Sports Participation By Generation



Note: Ages 6+

Source: 2016 Participation Report by the Physical Activity Council

Although millennials are the most active age group in terms of sports participation, one sport that has seen considerable growth among the Baby Boomer generation is pickleball. However, it should be noted that senior sports trends, such as pickleball, will only prove to be sustainable over the long-term if subsequent senior generations also take up the sport.



OTHER LEE COUNTY SPORTS TRENDS

The following additional Lee County sports trends are primarily based on regional/national event organizer interviews, local surveys/interviews, and analysis of comparable facilities:

Lacrosse -

- Survey respondents identified lacrosse as a growing sport with significant potential in Lee County:
 - “It would be great to have a dedicated lacrosse facility in Lee County.”
 - “Soccer has a hold on many fields, blocking out growth from other sports, such as lacrosse.”
- The Northwest Recreational Complex in Apopka has two dedicated lacrosse fields to host tournaments and events.
- One survey respondent mentioned that Collier County hosts numerous lacrosse tournaments per year which bring in teams and families from all over the country.
- One national event organizer hosts over 50 lacrosse tournaments per year across 19 states. Each tournament averages about 200 teams (3,600 participants) and over 8,000 spectators. The organizer expressed interest in hosting at least one tournament, if not more, in Lee County.

Pickleball -

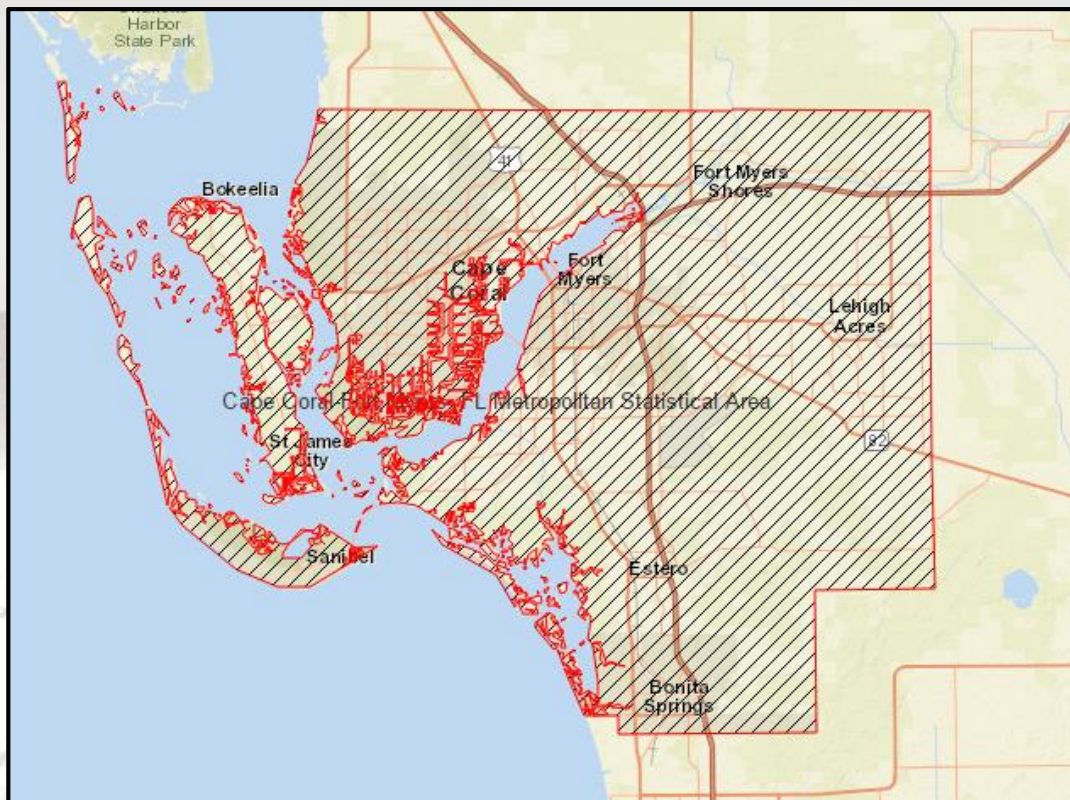
- A USA Pickleball Association representative stated that a multi-use indoor sports center, with approximately 90,000 square feet that could hold up to 30 courts, would be ideal for their larger events. They would not need a facility dedicated solely to pickleball, and the type of flooring would not matter, as they stated they could utilize basketball flooring or bring in temporary court surfaces. Such a pickleball event in Lee County could bring in about 500 participants.
- The Delray Beach Tennis Center in Palm Beach County is one example of a facility that actively promotes pickleball camps, clinics, and leagues, and is capitalizing on the sport’s growing popularity.



SECTION 10 ECONOMIC & FISCAL IMPACT ANALYSIS



METHODOLOGY - 1. IDENTIFY “LOCAL” ECONOMY



Source: Esri

For purposes of this study, Victus Advisors has been tasked with identifying the potential economic and fiscal impacts within Lee County of sports tourism expansion. Therefore, the local economy studied in this analysis is the physical area within Lee County borders (shown above).

As described on the next pages, economic and fiscal impacts are only credited when the spending source originates outside of County limits and occurs within the County's limits.



METHODOLOGY - 2. IDENTIFY “NET” IMPACTS

Victus Advisors estimates the portion of direct spending that could represent incremental (or “net”) spending within the County’s economy. Net Direct Spending figures account for the phenomenon of “displacement”, as described below.

DISPLACEMENT is the conservative economic principle that assumes a local resident’s sports and recreation budget would be spent within the local economy with or without development of a new sports/recreation venue.



For purposes of this study, we have conservatively assumed that local sports/recreation spending would be displaced (i.e. spent elsewhere within the Lee County economy) without the presence of the recommended expansion of facilities. Therefore...

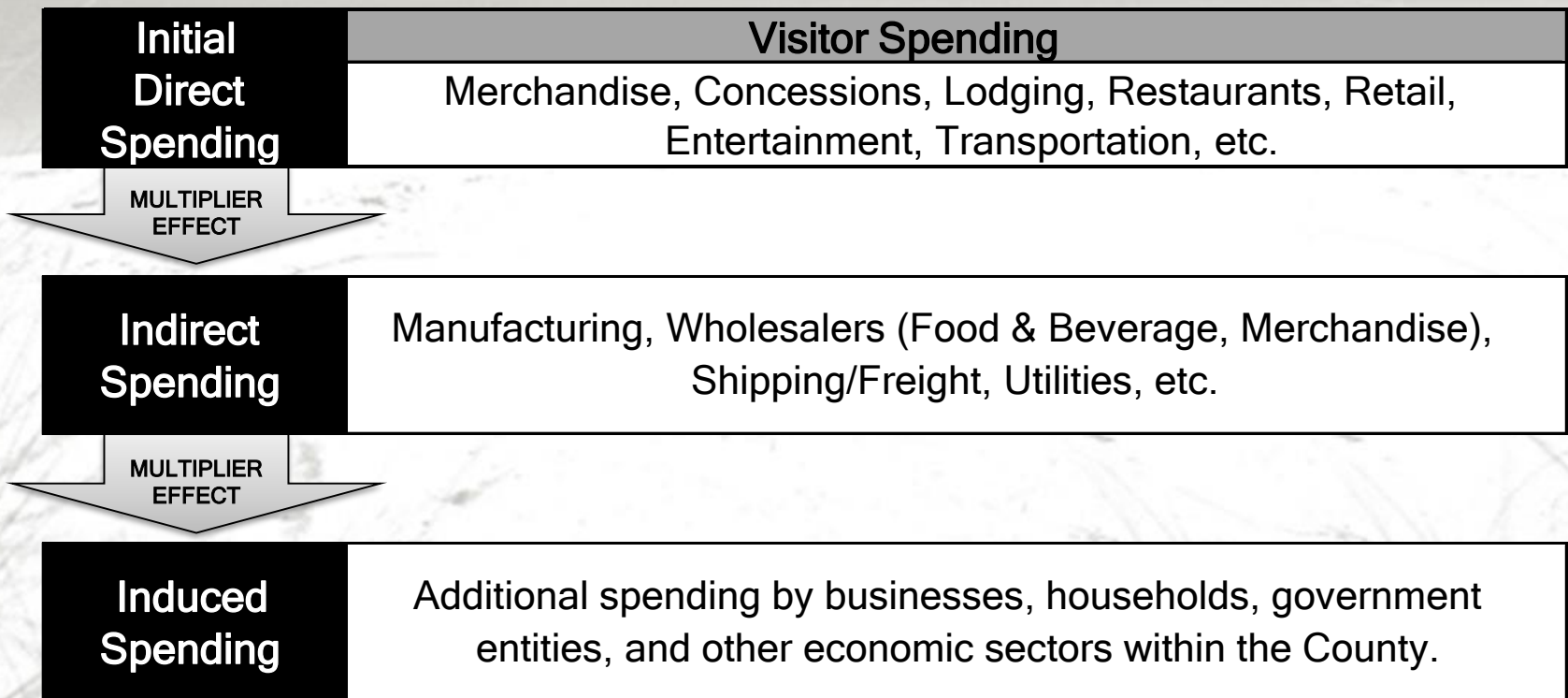


NET IMPACTS will only include the estimated dollars spent within County limits by non-resident visitors who travelled from outside the County.



METHODOLOGY - 3. THE MULTIPLIER EFFECT

Net Direct Spending that is captured in Lee County is subsequently re-spent, both inside and outside the local economy. The cumulative impact of those re-spending cycles that occur within Lee County limits is called the “Multiplier Effect”.





3. THE MULTIPLIER EFFECT (CONT.)

Victus Advisors utilized IMPLAN Multipliers specific to Lee County (as shown below) to estimate the following Net Economic Impacts:

- **TOTAL OUTPUT** (direct, indirect & induced spending in Lee County)
- **EMPLOYMENT** (full-time & part-time jobs in Lee County)
- **LABOR INCOME** (salaries & wages associated with Lee County jobs)

We also utilized our own proprietary model to estimate the key Fiscal Impacts of incremental sports tourism in Lee County:

- **COUNTY TDT REVENUES** (Tourism Development Taxes via room nights)

IMPLAN MULTIPLIERS - LEE COUNTY

Industry	Total Output Multiplier	Employment Multiplier	Labor Income Multiplier
Retail Stores	1.78075	28.56055	0.85823
Transit & Ground Passenger Transportation	1.72708	22.87965	0.60296
Amusement & Recreation Industries	1.62909	18.47962	0.62111
Hotels & Motels	1.55368	13.31650	0.49361
Food & Drinking Places	1.63423	27.11564	0.79811



METHODOLOGY - 4. KEY ASSUMPTIONS

It should also be noted that Victus Advisors utilized the following key assumptions in developing our direct spending models, IMPLAN multiplier model, and fiscal impact model.

These assumptions were developed by Victus Advisors based upon the results of our market demand study and comparable venue analysis:

- For purposes of conservatism, the economic/fiscal impacts on the following pages only include the short-term opportunities described in the previous section of this report (i.e. Priorities #1 and #2, including expansion of Player Development Complex to eight lit fields, addition of eight adjacent youth baseball/girls softball fields, and addition of eight adjacent multi-use fields, representing 19 total new fields).
- We have estimated 50 additional annual tournaments due to this 19 field expansion, including baseball, softball, soccer, lacrosse, etc., with approximately 72,000 incremental annual sports tourism visitors.



ESTIMATED ANNUAL ROOM NIGHTS & COUNTY TDT

Estimated Incremental Annual Room Night & TDT Impacts

	Baseball/Softball	Soccer/Multi-Use	Total
Additional Fields:	11	8	19
Estimated Additional Annual Tournaments:	30	20	50
Estimated Additional Annual Visitors:	48,000	24,000	72,000
Estimated Additional Annual Room Nights:	51,840	16,200	68,040
Estimated Additional Annual Room Night Revenue:	\$6,998,400	\$2,575,800	\$9,574,200
Estimated Additional Annual County TDT Revenue:	\$349,920	\$128,790	\$478,710

Victus Advisors estimates approximately 68,000 additional annual room nights and nearly \$480,000 in incremental annual County TDT revenue could be generated by sports tourism associated with the recommended expansion of baseball/softball fields and multi-use fields.



ESTIMATED ANNUAL ECONOMIC IMPACTS

Estimated Incremental Annual Economic Impacts

	Baseball/Softball	Soccer/Multi-Use	Total
Estimated Annual Direct Spending:	\$22,358,400	\$7,375,800	\$29,734,200
Estimated Annual Total Economic Output:	\$36,476,349	\$12,002,931	\$48,479,281
Estimated Annual Employment:	493	159	653
Estimated Annual Labor Income:	\$15,359,390	\$4,991,725	\$20,351,116

Victus Advisors estimates that approximately \$48.5 million in incremental annual economic output, more than 650 sustainable annual jobs, and more than \$20.3 million in annual wages could be generated by sports tourism associated with the recommended expansion of baseball/softball fields and multi-use fields in Lee County.



ESTIMATED ANNUAL ECONOMIC IMPACTS BY INDUSTRY

It is estimated that the Food/Beverage and Lodging industries in Lee County would benefit the most from sports tourism driven by expanded outdoor sports facilities (approximately 73% of the estimated incremental economic impacts, as shown below).

NET ANNUAL IMPACTS

TOTAL OUTPUT:	BASEBALL/SOFTBALL FIELDS	SOCCER/MULTI-USE FIELDS	TOTAL	
Lodging	\$10,873,298	\$4,001,978	\$14,875,276	31%
Food & Beverage	\$15,688,638	\$4,902,699	\$20,591,337	42%
Shopping	\$5,128,573	\$1,602,679	\$6,731,253	14%
Entertainment	\$3,127,845	\$977,452	\$4,105,296	8%
Transportation	\$1,657,995	\$518,124	\$2,176,119	4%
TOTAL:	\$36,476,349	\$12,002,931	\$48,479,281	100%
EMPLOYMENT:				
Lodging	93	34	127	20%
Food & Beverage	260	81	342	52%
Shopping	82	26	108	17%
Entertainment	35	11	47	7%
Transportation	22	7	29	4%
TOTAL:	493	159	653	100%
LABOR INCOME:				
Lodging	\$3,454,483	\$1,271,442	\$4,725,924	23%
Food & Beverage	\$7,661,839	\$2,394,325	\$10,056,163	49%
Shopping	\$2,471,690	\$772,403	\$3,244,094	16%
Entertainment	\$1,192,539	\$372,669	\$1,565,208	8%
Transportation	\$578,839	\$180,887	\$759,727	4%
TOTAL:	\$15,359,390	\$4,991,725	\$20,351,116	100%



ESTIMATED 30-YEAR IMPACTS OF INCREMENTAL SPORTS TOURISM

Summary of Estimated Total Impacts Over 30 Years Lee County Sports Tourism Field Expansion (1)

	Cumulative Total	Net Present Value (2)
Room Nights:	2,041,200	n/a
County TDT Revenue:	\$22,774,827	\$10,492,993
Total Economic Output:	\$2,306,421,933	\$1,062,632,388
Annual Employment:	653	n/a
Labor Income:	\$968,212,782	\$446,082,412

Note: (1) Assumes 11 new baseball and softball fields, and 8 new soccer/multi-use fields

(2) Our 30-year financial model assumes 3% inflation and 5% discount rate (based upon recent borrowing rates via County's 2015 CAFR)

Over 30 years, Victus Advisors estimates cumulative economic/fiscal impacts of incremental sports tourism in Lee County of more than 2 million total room nights, nearly \$23 million in County TDT revenue, approximately \$2.3 billion in total economic output, upwards of 650 annual jobs, and approximately \$968 million in total labor income.



APPENDIX A FOCUS GROUP TRANSCRIPTS



FOCUS GROUP TRANSCRIPT

PERCEPTIONS OF THE CURRENT AMATEUR SPORTS FACILITIES IN LEE COUNTY:

BASEBALL

- “As far as baseball is concerned the facilities are excellent. The only expansion is maybe lights at the 5-plex.”
- “The access is limited.”
- “Perfect Game takes everything.”
 - “Frustrating.”
- “There’s no better facilities nationwide.”
- “I would agree we have some of the best facilities in the country.”
- “Some of the clay on the fields are more sand and they could have better quality.”
- Re: Artificial Turf
 - “It would help during the summer.”
- “Definitely putting lighting at the 5-plex would help.”
 - “The only thing I fear about something like that, my pessimism is that it just means more tournaments and less fields that we get to use.”
- “Youth baseball is exploding. Population isn’t getting smaller. The trend is going forward and forward. And as far as any new facilities needed there’s no doubt you could add a 4-plex or a 5-plex or a 6-plex and it’s going to get used. They’re going to fill it with tournaments.”
- “And even someone like myself...I can get 20-40 teams here for the weekend for a tournament. It’s not hard; people want to come here.”
- “So as far as any new facilities needed, the return on investment would probably be made up within the first few years, there is no doubt.”
- “There’s a guy (name not understood) he owns a couple of small tournaments here and he just doesn’t do more because he can’t get time. So it’s not for lack of demand, its lack of supply.”
- “The weeknight thing with the lights would be helpful.”

- “My frustration is Sunday is the last day of a tournament (weekend tournaments) so the fields aren’t being used, but they’ll block them all off and they’re usually just doing the semi-final and championship game. So usually like two to four fields max and there’s like 22 fields.”
- “The lights at the 5-plex are extremely important. It would take some pressure off of Terry Park.”
 - “Last year I think there was 576 games played at Terry Park in one month. That’s a lot of baseball games on four fields. That’s almost five games a day because of outside events that come in.”
 - “My league is run on Tuesdays and Thursdays at Terry Park. And there’s a high school league that runs on Mondays and Wednesdays.”
 - “Grayson could move his Sunday league to a Tuesday/Thursday or Monday/Wednesday league to accommodate his growth.”
- “Biggest problem is that we’re maxed out on fields.”
- “Terry Park is the only park with lighted fields aside from the pro stadiums.”

RUGBY

- “We’re at Estero Community Center. There are two fields we use for events on Saturdays and a third for training on Tuesday and Thursday nights. It’s fine unless there is a conflict at the Community Center. One comment that I would make is that it’s a challenge to find a spot at another place if there’s a challenge with our fields. I don’t know how easy it is to work at other facilities within Lee County. I don’t know if it’s a shortage of field space or if it’s a challenge with the person that I deal with. I’m not sure which one it is to be honest.”
- “We’ve hosted regional and national championships. We’ve used the jetBlue facility.”



FOCUS GROUP TRANSCRIPT (CONT.)

FENCING

- “We are way under what we need square footage to do any of those things (hosting events).”
- “The sport is growing. In the 1980’s we had 14 members in the club. Now we have 120 members.”
- For cup events we need anywhere from 180,000-200,000 sq. ft.
- For National Championships we need anywhere from 240,000-270,000 sq. ft.
- Having trouble finding good facility for training. Need to train at least six to seven days a week.
- “I could grow the sport, but I’m reluctant to even advertise to try to get more people involved because the facility I have right now is 2,500 sq. ft. and I’m at maximum capacity. I can’t put any more people.”
- Lakeland has a massive convention center they use for major fencing tournaments.

FOOTBALL/CHEERLEADING

- We use high school fields on game day, and fields on the side for practice.
- Need access to an indoor facility for practices, etc. in the event of rain outs
- High school makes us bring everything to set up to use the fields.
 - It takes us four hours to set up and take down on game days.
- Other Pop Warner organizations have had the same issue in the County.

SWIMMING

- “We have a good facility for smaller meets.”
- FGCU Aquatic Center
 - “Get rid of all that shade structure and put in bleachers that was supposed to be in the original plan.”
 - Increase the seating to bring in larger events.
 - To hold state series events need to have about 2,000
 - Maybe a covered roof

ARCHERY

- Lease a portion of Nalle Grade Park (40 acres)
- “We maintain the property.”
- “We’re pretty well self-sustained.”
- “We put in our lights.”
- “As far as the needs from the County, it would be nice if we had a better facility. But we’re just making do with what we have.”
- “As far as growth potential...we have a lot of kids in the program, and that takes instruction and it takes a lot of time.”
- “We’re growing as a club, but I don’t want to grow too fast.”
- “As far as the facility goes, we have a decent facility. We have a state event this weekend at the club.”

JETBLUE PARK

- “We’re playing in a parking lot. They actually park cars on the field.”
- “There are no bathrooms.”
 - “You lose 20 minutes of your practice because you have to walk out (of the facility to go to a bathroom).”
- “Not a dedicated soccer facility.”
- “Facility is great, but when it’s spring training you have to go to Bayshore Soccer Complex.”
 - “You have maybe three fields there.”
 - It’s over-used.

CENTURYLINK SPORTS COMPLEX

- “They got four softball fields that we can’t use even though technically they’re not used until aft five o’clock in the evening. We talked about utilizing them for practice from three to five. That was a no go.”

BUCKINGHAM COMMUNITY PARK

- “The fields at Buckingham are basically used every day of the week. And they need rest. People don’t understand that.”



FOCUS GROUP TRANSCRIPT (CONT.)

WATER SPORTS

- “To my knowledge there are no facilities for water sports. I don’t know of any boat house in Lee County with all the water resource that we have. The international athletes are here (Florida) for four to six months and there are 1,500 of them looking to stay that length of time and train in open water.”
- “Our club was awarded the national championships for 2017 and we had to move it to Central Florida.” - Canoe and Kayak

TENNIS

- “There doesn’t seem to be any scheduled or planned court renovations or resurfacing.”
- “Tennis is not really a priority with a lot of the parks.”
- “We have courts right now that are so faded....and these are our tournament sites. It’s gotten to the point where it’s almost embarrassing to invite and offer out of area athletes to come here. It’s looking tired, worn, and shabby when it shouldn’t after three years. Some of that is the vendors that did those courts.”
 - “It’s sort of last on the list” - According to County maintenance.
- “We need basic storage at the majority of the parks. Our tennis directors will lug their equipment day in and day out because we have no (storage) other than Three Oaks. That’s a huge issue on an annual basis.”
- “Parking is also a problem.”

BROOKS COMMUNITY PARK

- Utilized for Pop Warner, primarily.”
- “That facility is not available to anybody else, at least as far as I know.”
 - “There needs to be more collaboration if we’re going to be building county facilities. It needs to be more accessible.”

PERCEPTIONS OF OTHER AMATEUR SPORTS DESTINATIONS:

- “Sarasota has **NATHAN BENDERSON PARK** that was made for rowing and engineered-designed perfectly for rowing and flat-water paddling events. The problem is that it’s really expensive and not that far away, so to do what they did, I’m not sure if that’d be necessary down here. But that’s a fantastic paddling facility up there.”
- “We do a lot of tournaments in Miami, Tampa, Clearwater, Orlando, and Lakeland. We use to do a lot of tournaments there, but they’ve moved to Boca Raton now.”
- “As far as facilities goes, Clearwater has wonderful recreation facilities. Very large and very spacious. Best one by far is the Lakeland Convention Center. It’s multipurpose you can do so many things at that convention center.”
- “We travel to Venice in Naples.”
- “In Florida, **SANLANDO PARK** (for tennis) in Seminole County.”
- “My ideal (for tennis) is Delray Beach (**DELRAY BEACH TENNIS CENTER**). It has additional courts. You could have a draw and professional events with that kind of facility.”
- “**FRANK VELTRI CENTER** (Tennis center in Fort Lauderdale) is a public facility.”
- “**LAKE NONA** is the new home of U.S. Tennis in Orlando. They will have 100 plus courts.”
- Daytona Beach has clay courts owned by the City. **FLORIDA TENNIS CENTER**.
- “Surprise, Arizona is a draw”...for all sports.
- “They (Manatee County) have some tremendous baseball complexes there.”
 - “Parking, quality of fields, shade structures, restrooms, scoreboards.”
- “Sarasota has **TWIN LAKES PARK**, which is huge. It must be 1,000 acres. They have baseball, football, soccer...they can accommodate a wide variety of sports.”



FOCUS GROUP TRANSCRIPT (CONT.)

- “Apopka just did a huge renovation a few years ago that I think is probably the best facility I’ve seen so far as far as having a multi-use facility where you have baseball fields and tennis courts, and an amphitheater for concerts. I would probably say they lacked parking.” (**NORTHWEST RECREATION COMPLEX**)
- “We just recently went to a game in Royal Palm Beach (**ROYAL PALM BEACH COMMONS PARK**) and their rec center seemed to be modeled similar to (**NORTH COLLIER REGIONAL PARK**)...They had soccer goals that also had dual purpose as field goals.”
- “For youth sports I think the Apopka one (**NORTHWEST RECREATION COMPLEX**) is the best one.”
- Billy Bowlegs Park and Page Field
 - The “facilities and practice fields are an abomination.”
- “It’s hard with the high schools here. One of the issues that we have with Pop Warner specifically is because you don’t go where you live within the school district so there’s no sense of pride. The kids can go wherever they want for school, but for Pop Warner specifically they have boundaries so they can only go to certain clubs.”
- “We played at the Apopka fields (for soccer) in Orlando. Some of my teams are playing out of state.”
- “For tournaments we travel a lot to Orlando because we have a sister club there too.”
- “For local tournaments we go to Naples.”
- “We use the fields up at Lakewood Ranch (**THE PREMIER SPORTS CAMPUS**). That’s a huge complex. It’s growing there, they are adding things to it all the time.”
- “Part of our teams were in Jacksonville last month.”
- “A lot of my teams play in Disney.”
- For 200 soccer teams in a tournament, facility would need about 10-12 fields.
- “We wouldn’t be able to use Kelly Roads (Soccer Complex).”

- “The worst part of any team competing there (**DISNEY WIDE WORLD OF SPORTS**) is that families, especially in soccer, travel. And when you go to Disney everyone that goes has to pay to go and watch their child. You can’t bring in a drink of water. It just becomes almost cost-prohibitive.
- **NORTHEAST REGIONAL PARK** in Polk County
 - “This is a tremendous model of a multi-purpose campus.”
 - “Everything is maintained and clean, I thought it was Disney.”
- “I’m not looking for a new complex. If you can just light the 5-plex and then build the youth fields because what will then happen is the Perfect Game will use the youth fields instead of the baseball fields that Grayson and I need to use. That would open that up for us and you could still take care of Perfect Game or any of the other five or six events that come in to southwest Florida. I think that would be the most economical way to take care of the baseball part.”
- The **LONG CENTER** in Clearwater and a facility in Orlando (unnamed) are the facilities that FGCU competes with. The **O’CONNELL CENTER** (University of Florida) is currently being remodeled.

PERCEPTIONS OF LEE COUNTY AMATEUR SPORTS COMMUNITY:

SOCCER

- “I don’t think any new leagues would be able to come into our area.”
- “With the weather, soccer.”
- “We’ve got two kids, love soccer.” - chose soccer over baseball.
- “I would think a big multi complex could accommodate a lot of sports.”

CAPE CORAL

- “The City runs the Cape Coral little leagues, and they’re horrible. The best relationship I believe is that the County run the facility and that the board of directors run the league.”



FOCUS GROUP TRANSCRIPT (CONT.)

MULTI-USE FIELDS

- “The problem there is if you ask a kid that plays in a tournament where all his games are played on artificial turf...they can hardly walk.”
- “Artificial turf fields still need to be maintained.”
- “It would be great to play in an indoor facility.”
- “If you could get me six indoor courts, I could have them used for 18 hours a day.”

UNDERSERVED SPORTS

- “I would say basketball.”
- “Basketball and volleyball have been better served by the school board than any other sport.”
 - “Every high school has a gym.”
- “I only know of SWIFL Basketball and I hear it's unorganized. They are going around from facility to facility for practice.”
- “There's really no place for the over 18 crowd to play.”
- “We go down to North Collier to play for my two boys because there is nothing here. (Basketball)”
- “I would say football and soccer. If you build the fields for soccer they're going to come.”
- “There are more lacrosse teams popping up.”
- “In-line roller blading?” Has heard it's big.
- “There was a lacrosse tournament held over New Years, and the fields were just trashed afterwards.”
- “Everyone is very reluctant to give up or share their field space.”
 - “The minute it's relinquished, will you ever get it back?”

SUPPORT FROM LEE COUNTY FOR AMATEUR SPORTS:

- “One thing that they can definitely do is...reduce costs for tournaments.”
- “I can't afford to do a major tournament here of any kind...too expensive.”
- “On the baseball side, Gary and Jeff do a tremendous job...”
- “When was the last we saw an article about swimming, archery, and soccer...”

- “They (the local high school) are now requiring us to spend more money than we can actually bring in on a football game day. Even Parks & Rec are the ones who maintain the fields, they're going to require me to spend so much money on custodians and sheriffs and rental usage that I will actually lose money on every single game. So why not have our own facility. That's where we lack the most support at least from the high school.”
- “The media here, they disappear.”
- “With us (swimming) I feel like they give us great support. They've been very beneficial to us. If it wasn't for Gary and Jeff (helping get the media) we wouldn't have much success there. I think they do as well as anyone else could possibly do.”
- “The Sports Development folks have been great with our regional events that we've hosted.”
 - “I don't question, but I'm just curious as to the general communication that the people that do the scheduling have. How they schedule events.”
- “Sports Development and Parks & Rec sometimes act like they're mortal enemies.”
- “Sports Development is wonderful - Jeff Mielke, and Gary Ewen, and Connie...if they can help you when they know what you need, they will bend over backwards.”
- “Parks & Rec is going through an organizational change again. Week to week I find out there's somebody new that I'm supposed to be talking to only because the other person is no longer there. That's an issue from north to south.”
 - “Different managers at the parks.”
 - “If I don't talk to them, they don't talk to each other.”
 - “They don't want to share resources. They're the same department.”
 - “Communication needs to go both ways. Sometimes I don't feel like a partner.”



FOCUS GROUP TRANSCRIPT (CONT.)

- “At Buckingham the County has been great to us. Whenever they ask us, if there’s a tournament coming in, we’ll try to make arrangements if they need to use our fields. We’ll give our fields up. But anything we ask for they’re doing a great job.”
- “My impression is with the Twins or the Red Sox, you’ll have anything you want. But these outliers that are out there, these Rutenberg Parks, these other facilities that are out there are not giving the things that they need in terms of being able to accommodate. Tennis, softball, other high school sports and other activities. There’s a lack of coordination internally.”



APPENDIX B OPEN-ENDED SURVEY COMMENTS



OPEN-ENDED SURVEY COMMENTS

PLEASE SPECIFICALLY EXPLAIN THE PRIMARY REASON(S) FOR YOUR DISSATISFACTION WITH FACILITY:

- “Not enough field space to support multiple sports.”
- “Fields need to be maintained better. Fields have hole filled with sand and it is dangerous for both players and officials.”
- “Parking is a real issue.”
- “The Fort Myers Aquatic Center has severe issues with water quality. There is visible algae on the pool bottom and swimmers often deal with issues affecting eyes and ears due to the water quality.”
- “Water quality varies from fair to disgusting.”
- “CC North - quite poor fields, limited amenities.; Skatium - old; Harborside - old; Terry Park - very old, no amenities, limited seating; Veterans Park - only used outside facilities, tennis courts poor shape”
- “Water quality at Fort Myers Aquatic Facility has been terrible due mostly to poor choice of equipment rather than personnel/management. Hours of operation for the public at OUR LEE COUNTY pool at FGCU have been erratic, unreliable and inconvenient.”
- “Neither facility meet the needs of a competitive swim team. Neither pool has adequate lanes, resulting in overcrowded lanes. DeLeon restrooms are sub standard. The facility does not have the infrastructure to support team hosted meets.”
- “Conditions of the facilities, not very clean, parking not enough concession stands,”
- “I love the Kelly Road complex -- keep it up.”
- “Fort Myers Aquatic center seemed dirty and run down. Stars and North Fort Myers Community center seemed run down.”
- “Changing rooms need to be updated and better security. The pool is great but the place needs some serious updates.”
- “Part of town isn't very inviting and seating is limited.”
- “Fort Myers Aquatic Center needs to be updated and needs a facelift. The pool looks horrible and old. There's no room when events and meets are held there. It's very cramped. The pool is small. The timing equipment sucks. The diving blocks need to be updated. Parking is horrible. For as much time as swimmers spend there, they should have a nice aquatic center to accommodate them. Lehigh Community Center (pool). The pool is soooo tiny! There are no diving blocks for the swim team to practice with. It is not equipped electronically to hold meets and events. It can only be used as a practice pool but is extremely cramped for swimmers.”
- “The bathrooms are disgusting. My daughter swims there and we try not to even go in the bathrooms. They are never cleaned. There are feminine products left laying around for days, there is are no hand towels, the only blower is not even by the sinks. The showers are filthy. Overall, it's just gross.”
- “As part of a swim team, we are at aquatic center 5-6 x/week. The facility could use an expansion. Lanes are overcrowded, particularly in the summer/fall when community swim overlaps with team practice there are not enough lanes. The facility could use a lot of updating as well. Rutenberg could use better, updated playground equipment. More bathrooms close to playground.”
- “No parking-parking is horrendous-accidents waiting to happen-needs a new design pool is outdated-no deck space and pool is too small for community use and swim club.”
- “Poor field conditions for soccer.”
- “Run down, outdated.”
- “Lack of bathrooms or condition of bathroom.”
- “Bayshore soccer very unkempt - fields no good - pot holes, etc..”
- “Better bathroom facilities.”
- “Outdated.”
- “Field conditions, people in charge.”
- “Stars complex needs to be updated for safety of the playing fields for baseball and softball. Batting cages are dangerous. Bathrooms need updating and lack overall cleanliness.”



OPEN-ENDED SURVEY COMMENTS (CONT.)

PLEASE SPECIFICALLY EXPLAIN THE PRIMARY REASON(S) FOR YOUR DISSATISFACTION WITH FACILITY:

- “Dirty.”
- “They all seem old, dated and dingy.”
- “Bathrooms are poor quality.”
- “Rutenberg and bay shore in particular are older and appear dirty and unkept.”
- “Bathrooms at Kelly Road and Cape Coral are an issue. The Kelly Road bathrooms are too small to accommodate average soccer day crowds. Cape Coral bathrooms smell terribly. Cape Coral also smells (bad) since the removal of the solid fencing.”
- “We are continually having to share/change our field time with soccer. We constantly have to tell other people playing soccer to get off our fields during our practice times. The fields were unusable last year due to a fungus and the treatment. We had roughly 100 kids across 6 teams sharing one fields due to the fungus treatment.”
- “Beautiful facility but so far away from Estero.”
- “Estero Park doesn't have enough going on and the Skatium is in a very bad area. Will not got to Skatium ever again. Hoping Estero will get more going.”
- “Estero Community Park should have more for kids. Water Park, lacrosse fields, Roller Hockey rink.”
- “Lack of adequate restroom facilities, field conditions at Bayshore are almost dirty instead of grass. Better Lighting at WakaHatchee for vb courts (like Estero).”
- “No specific center for baseball, softball and swimming.”
- “Very far for us to drive, bad neighborhood or location. It would be better to have a facility for baseball herein Estero.”
- “County workers not maintaining the fields properly. Stars has a lot of gang issues.”
- “The field are very unsafe, is more dirt than grass so athletes are most likely to have an injured due to the uneven fields.”

- “Parking.”
- “They fields weren't set up for fast pitch play other than the bases moved. No concessions...”
- “The fields are not well maintained. It looks like the fields were thrown together to say, we have an area where we can play youth sports but it is no different then a big back yard. I am referring more to the soccer and football fields. We are not involved in baseball or softball. It also would be nice to have some indoor facilities considering we live in Florida. Summertime with the heat and rain there needs to be some places to be able to do youth sports safely. If the city can provide 77 million dollars for a stadium use 2 months out of the year, I'm sure something could be raised for youth sports. I understand it brings in revenue but in the long run if kids become successful in any sport they play or in life, donations would come back full circle.”
- “Jetblue needs more soccer fields opened. Kelly road needs security or more police presence. Bayshore field are terrible. Thx.”
- “STARS needs an upgrade to freshen it up. Whether it be County money or City money, let's put our good tax money to use. If we're going to spend \$85 million so a baseball team can make money at JetBlue Park, let's spend some money for our very own community, too -- especially since the hotel bed tax money should give us some extra funds to spend on non-baseball sports facilities.”
- “The Rest Rooms are located only at the Baseball facility. The soccer facility has no Rest Rooms, so we have to walk or use Portable Units. This is a major concern!!!!”
- “Bayshore soccer fields are frequently in need of Maintenance. Fields have poor sod, bare areas, and pot holes.”
- “Ft Myers Aquatic center locker room needs a great renovation. It's dirty and not modern. Lockers are poor. Showers are poor”
- “Mainly, the bathroom facilities are horrible across the county. No proper maintenance, not enough products (tissues, soap, paper towel, etc.). It is usually looks dirty, smell dirty and there seem to be no maintenance or replenishment during events.”



OPEN-ENDED SURVEY COMMENTS (CONT.)

- "Bathrooms are also too small, not enough stalls, no changing room."
- "Field conditions are horrible holes and ruts at all of them and parking is horrendous at Three Oaks."
- "The fields (at Bayshore Complex) are terrible, the bathrooms are terrible and the sidewalks - well, Lee County is lucky the parent that fell and hurt herself didn't sue, had it been me, I would have."
- "Restrooms at all."
- "Jet blue does not have restrooms for use of soccer. How they r wonderful at the park itself. Other parks lack adequate restrooms and lack cleanliness. Need updated."
- "Holes in soccer fields."
- "NFM fields flood in the spring and parking is a disaster."
- "Estero Community park should have Lights added to their soccer fields in the back."
- "At Bayshore, the fields we've played on have been poor quality and there are no bathroom facilities. The entrance to the complex is poorly marked and not well lit. JetBlue Park also needs permanent bathrooms and water fountains that are closer to the soccer fields. The ballpark bathrooms are locked certain times of the year. Also, these soccer fields should be available year round. Is there room for a paved parking lot elsewhere on the property?"
- "Bathroom facilities very dirty. No toilet paper, paper towels, soap. Zero maintenance."
- "Bayshore Complex is remote and very dark at night. It is also far away from teams who may want to use them. Cape Coral Sports Complex is good."
- "Jetblue - terrible restroom facilities far away from soccer fields."
- "CCSA Poorly operates that complex."
- "Field conditions."
- "Infield could have better clay. Hard ground with sandy top. Also the dugouts at CCSC could be larger. STARS dugouts are also odd."
- "Fields need to be better maintained and surrounding area cleaned up and updated."
- "At Fleishman, the restriction of coolers or outside food and drink during baseball tournaments for families is really annoying. We have to spend ALL DAY there and the concessions are unhealthy, pricey, and take forever."
- "Poor drainage at Bayshore Soccer Complex, can't use Jet Blue Park year around."
- "Need to spray for mosquitoes!!"
- "Bathrooms are not available."
- "The fields needed to be upgraded and general maintenance needed to keep the parks looking nice."
- "Fields conditions are very poor. Pitching mounds and infield clay in poor conditions. Overall facility conditions out of date. Restrooms always dirty and in poor condition. Weekend tournaments never have a clean up crew or field maintenance crew daily."
- "The baseball fields are not safe to play on. The mounds are not taken care of correctly leaving opportunity for injury. Our league pays to use these fields and most of the time the field isn't lined and the grass isn't cut. The infield is not raked so when people slide it burns their skin. I have played baseball my entire life without issue, since playing here I have sacra that will last forever due to lack of care."
- "Locker rooms are disgusting, dirty, no room to change clothes, no A/C system. Pool water temperature is excessively warm and too hot to workout. Excluding FGCU. I have experienced ear fungus infections after swimming in the Lee county pools. Excluding FGCU. Pools are closed on Sundays during seasonal period!"
- "Having played baseball at those facilities, the ones I rated poorly have commonly not been maintained properly, and are often not prepared for games despite our league having paid for it."
- "Quality of the field is in sub-par condition. Not big enough for 18+ men to compete on. Fields used are for 18- quality players."



OPEN-ENDED SURVEY COMMENTS (CONT.)

ADDITIONAL COMMENTS:

- “Please also consider developing Ultimate Frisbee leagues. This sport has a big following up north.”
- “I think if you consider a multi sport Rec plex that is centered around a state of the art Swimming/diving facility and gymnasium that can accommodate multiple indoor sports Ft Myers/Lee county would elevate their status in the amateur world immediately. Additionally, I would love to be on that committee to pioneer this facility!”
- “Nice facilities cost \$\$, we are a smaller city than most, so comparing to places w deep pockets is not fair. We want nice places so stick w basics Nice even fields, good grass, good seating, food ,restroom facilities, parking etc. ,. The biggest problem is traffic flow in season.”
- “More multipurpose fields are needed in south lee county (Estero area) and youth basketball recreational leagues (also in the Estero area).”
- “There is a need for additional fields that are not dominated by soccer. Soccer has a hold on many fields blocking out growth from other sport, such as lacrosse. I believe that the county needs to look at the data around soccer versus other sports and either develop new fields or better allocate time to multiple sports.”
- “Lee County needs to support ALL sports & also try to grow emerging sports like Lacrosse, Field Hockey & girls sports. They can not focus all their attention on soccer, baseball & football.... letting those sports dominate the usage of the fields first. Lacrosse can bring a lot of \$\$ to the county. Collier county hosts numerous lacrosse tournaments yearly which bring in teams (thousands of players & families) from ALL OVER THE COUNTRY TO NAPLES to spend their money and ultimately vacation. Lee county needs to focus more on attracting this type of activity. Estero Rec can expand their facilities and add lights to the back fields currently used by rugby, light the fields by the stage and use those along with developing more fields on that property. These fields can be used then in conjunction with the Estero Pop Warner fields to host a large Lacrosse tournament to drive tourism into the Estero Area.
- “Private development or running of facilities would help with quality of fields and facilities. If county does maintenance it should have dedicated crew by facilities to ensure it is care for properly including lighting, nets, parking area...”
- “The bathrooms in most facilities are horrible and embarrassing.”
- “Lee County is too soccer biased. Other sports I've been associated with as a player, coach and administrator (lacrosse, rugby, ultimate Frisbee) that are non-standard but could, if given a little field time, explode in this area are largely closed out by soccer. Some soccer programs reserve fields a year in advance but don't even USE them. Meanwhile, some of the other sports are struggling to find a place to play. It's disheartening, particularly when we have tremendous athletes in my main sport (lacrosse--I run a rec program, a travel program, and coach in high school) who get closed out of local opportunities. We have to travel hours to have a tournament. Meanwhile, we have been denied the opportunity to host a tournament here for the past ten years. The reason given is "lacrosse damages fields more than other sports." That's been proven to be untrue on a national level and, more importantly, it's been anecdotally denied by Lee County groundskeepers!”
- “Consider hosting a large triathlon event in Lee county. Half or full ironman distance. Suggest World Triathlon Corp in Tampa as a contact.”
- “Lee County has the potential to be a great destination for sports tourism. We have the year round weather to host state and national swim meets, however don't have the facilities to do so at this time.”
- “Lee County is very supportive of baseball and football, however, other sports are lacking in support and are not promoted at all. The associations for those sports have to carry the cost and responsibility for promoting their own events, which is very costly for 501c3 non profit organizations. Swimming, BMX, and equestrian facilities are lacking therefore new teams are unable to form.”



OPEN-ENDED SURVEY COMMENTS (CONT.)

- “My son is a high school-aged competitive swimmer and we travel across the state 10-12 times per year for swim meets. A given meet is 3-4 days, meaning at least a 3 night hotel stay for each meet, along with meals for the family everyday. At an average swim meet, we spend \$1,200 to \$3,000 (depending upon the time of year) at the destination city when accounting for lodging, food, gas, entertainment, etc. The average swim meet has 400-600 swimmers. Assuming an average weekend of \$1800 per family and 500 swimmers, that equates to \$900,000 in additional revenue to the host city. We travel to meets in Sarasota, Stuart, Orlando and Gainesville multiple times per year. Lee County has one facility capable of hosting a large swim meet (FGCU Aquatics Center) and one that is dilapidated with horrible water quality (Fort Myers Aquatic Center). It seems Lee County is missing out on a significant source of additional revenue for businesses not doing more to attract swim meets to Lee County. A large competition pool complex, similar to that recently constructed in Stuart (which hosted all four high school championship meets, the FSPA Meet and will host the Florida Age Groups Championships in March) in the north end of Lee County (North Fort Myers, North Cape Coral?) would generate significant revenue for local businesses.”
- “Swimming pools must be updated and new pools built. A 50 meter pool in downtown Fort Myers area or in Cape Coral is a must. FGCU has a 50 meter pool. The next closest 50 meter pool is Naples or Sarasota. Lee County schools do well in the state meets in swimming. Lee County residents get many college athletic scholarships for swimming. But swimming is lacking in modern facilities. Most 25 yard pools do not meet the state mandate for depth at the starting block for starts. Swimmers in Lee County must start in the water. Almost on other counties in the state have pools that do not meet the depth requirement for a on the block race start.”
- “I am VERY disappointed in what has become of the STRIKERS organization, or lack there of .. The coaches are great but this is our first year not in rec league but stepped it up to the u8 academy league. We choose this since we have played the academy in the rec league in the past and the kids would run circles around our kids. the wife and i both assumed the children would learn and play positions more , a little less running all over the field so to speak and more passing and skills. We are disappointed in the fact last night there was NO REF for the game we have had a few games where the other team didn't show up we have had games canceled a few times communication is lacking. We have friends who play on the league at jet blue and are seriously considering enduring the miserable drive up Daniels prkw in season for a better experience“. Lee County has the potential to be a great destination for sports tourism. We have the year round weather to host state and national swim meets, however don't have the facilities to do so at this time.”
- “We need a aquatic center that support our wonderful swimming team.”
- “Please build a swimming/sports complex in the Buckingham/Alva area!!!”
- “Most of the facilities bathroom facilities are lacking and poorly taken care of.”



OPEN-ENDED SURVEY COMMENTS (CONT.)

- “Baseball and Softball have a few facilities but the # of fields is inadequate because everyone wants to play at the same time. This leaves young children playing too late on weeknights. Outdoor shooting locations are severely lacking. Dedicated lap pools for competitive swimming are also lacking.”
- “Lee county needs to update older facilities and implement security for our children's safety.”
- “They desperately need an indoor swim facility. The Tampa/Clearwater area has serval of these facilities and it generated a substantial income from hosting swim meets.”
- “With all the families moving to this area we really need to step it up and create better programs and facilities. In fort Myers shores there's not even a rec center for the kids and no program guide that comes out for them. A freaking parent had to make a faux soccer league! That's criminal! No wonder our kids are so obese here! You really have to work hard to get your kids in sports and drive far! I drive over an hour for swim and 40 min. For gymnastics right here in my county.”
- This area really needs another competitive pool facility. There are too many high school teams trying to share the Fort Myers Aquatic Center, making the outdated facility way too overcrowded. An indoor aquatic center would be great for this area. Comparable to the facility in Clearwater (The Long Center), a grounded, indoor aquatic center would be a great asset. The kids here lose so much practice time because of the high frequency of lightning and storms much of the year. A state of the art indoor facility out of the sun and storms would draw many teams across the state to this area for meets. It could be a multi-use facility for the community that could house many other sporting needs as well.”
- “The Deleon Pool bathrooms are awful and facility needs upgrading. The tennis club next door is also in dire need of a facelift. The city is not putting any money into these facilities - which could be such wonderful places. They both have so much going for them - they just need attention.
- “An indoor swim facility that helps with both lightening issues in summer and weather issues in winter would significantly assist the sport of swimming in the community. Swimmers from Lee County are at a disadvantage due to availability of pool time at long course facility, availability of time in the pool due to weather conditions such as lightening, and availability of enough pool space to serve all the competitive swimmers in Lee County. When travelling across the State, most facilities visited including Clearwater, Orlando, Sarasota, Stuart, Gainesville, etc., all have better facilities for their swimmers. The tenacity and ability to adapt to less adequate facilities in Lee County compared to other cities in Florida speaks volumes for the base of athletes in our community. Please help the swim community.”
- “Safety , cleanliness , parking.”
- “The two most popular sports in our area for youths is baseball and soccer. The second is ignored.”
- “Many of the soccer fields are lacking care. I believe that if there were more fields available to soccer teams and leagues, they wouldn't be so overused and abused.”
- “We can do so much better by investing in our soccer program, huge market and growing.”
- “Lee County should be able to attract large competitive sports. The influx of revenue would be amazing. If Lee County wants to compete, the phrase, "you gotta spend money to make money" resonates. Our facilities are old and dated. Not only a fresh paint job, but technology should be infused in the vision. Ultimately, state of the art facilities will benefit the community and pay for themselves. Additionally, having sports/outdoor social arenas may help keep children (and adults) from all backgrounds happy and healthy.... a long term social benefit. Lee County residents drive to Naples to use their water park, sports complex and children's museum. That is sad. Please help!”
- “Sometimes it is the location of these parks that limits its potential. You might be able to change the scenery but not the people.”



OPEN-ENDED SURVEY COMMENTS (CONT.)

- “Kelly Road is one of the nicest area sports facility. However, it's in a high crime area and only has one restroom. Bay shore and Rutenberg are both older and feel unkept. Caliber of people seems poor as well. The nicest facility is by far Fleishmann.”
- “Soccer is a growing sport in the area, but the facilities are not up to standard where the local clubs can successful tournaments. Access to hotels, transportation, and the facilities themselves are lacking. In regards to the facilities, particularly the bathrooms, parking, and grass quality is an issue. Also, bugs are terrible at Kelly Road.”
- “We need facilities that have a large number of fields in one location to host tournaments for soccer and lacrosse.”
- “Just because some sports are "up and coming" doesn't mean they deserve any less dedication, support or commitment from the county.”
- “I love Three Oaks Community Park. It provides a variety sport opportunities for me and my kids. Always clean and well kept. Just overcrowded.”
- “Baseball and Softball is the sport of America and we are slowing pushing this sport out of southwest Florida. There is not enough fields for these kids to play on. Look at the number of kids on the high school JV teams and Varsity teams, you will see the want to play baseball and softball is there. Let the travel aspect of softball and baseball in our community and the community needs to welcome travel baseball and softball. Tournaments with these two sports has the potential to bring in so much money to this county if you would allow it. We need a facility with more fields. I travel a lot and Sarasota has a baseball or softball field on almost every mile you travel. Kids have the chance to play and a place to play. I wish we had that for all the kids here”.
- “Estero needs baseball diamonds.”
- “I think we have enough in close proximity and don't need to waste more money or increase taxes.”
- “The county gives too much priority to soccer which prevents other sports such as lacrosse to grow in the area. It would be great to have a dedicated lacrosse facility in Lee county. It's the #1 growing sport!”
- “Estero Community Park should have more for kids and families, IE Water park, Roller Hockey rink, Lacrosse Fields.”
- “Would love to see youth baseball/t-ball & soccer in Estero. Why go to Bonita Springs to play?”
- “More official county "leagues" would drive involvement better, rather than volunteer or for-profit clubs.”
- “Never in my life have I lived in, nor heard of a town that doesn't have their own little league and pop-warner leagues. The facilities for children in The Village of Estero are non existent. Being an ex NCAA Division 1 athlete, I'm thoroughly disappointed.”
- “It would be nice to have a central facility that sporting events could be held: swimming, baseball, softball, basketball, soccer etc.”
- “Would likely be a spectator if there was a venue for kids to play. Would be a reminder of when my kids played many years ago!”
- “Thank you for all that you do for the community.”
- “There are not many opportunities for the kids to develop their qualities to continue with the sports careers, Lee county sport should be more involved and be able to participate to help kids to create better opportunities that will continue to develop our children futures, having the correct facilities and personnel.”
- “‘Club’ volleyball is huge in Florida but we don't have the venues to host tournaments. They are large in Tampa, Orlando and SE FL as they have convention centers that can accommodate them. Also...they have the hotel rooms that are needed by traveling teams.”
- “Thank you for all that you do provide.”
- Lee County Sports Development staff have been great to work with and we enjoy bringing large events to Lee County because of the hospitality and good working relationship. Additional fields would provide a great location for USA Softball of Florida to hold additionally championship tournaments. Thanks.
- “The have decent facilities, however some could use a facelift, and others could be further developed. However, Ft Myers is a fantastic location with lots of choices for hotels, restaurants, and transportation.”



OPEN-ENDED SURVEY COMMENTS (CONT.)

- “The San Carlos Scorpion Soccer Club has been around for a very long time and we utilize 3 Oaks Park in San Carlos. We have over 700 kids in our program and the smallest field space, we also have to share space with other sports and are limited. We need help, we are losing kids to neighboring facilities all of the time and its not fair that we do not get treated fairly. My name is Kevin Gorski, President and you can call me anytime at (REDACTED) to discuss this in person and you will see the severity of our situation.”
- “We need to build more baseball and soccer fields to meet growing need of amateur sports. Please involve county staff in development and construction phases of projects. Thanks!!”
- “Comments based more on My involvement in the Archery Program at Nalle Grade, very good county support, limited involvement in other county programs.”
- “While I am overall pleased with the programs and the facilities, I feel that the youth soccer league at the Bayshore soccer complex is highly disorganized. There are never enough coaches at the beginning of the seasons, and many of the coaches are inexperienced in the sport itself. The uniformity of the rules in between facilities on the traveling teams to not match, so every traveling game is a different set of rules which caused the loss of several matches. Also because of the different rules, our teams were always drastically outmanned because other teams have 12 players while we only have 10. That doesn't seem like a big difference, but that equates to the other team having the ability to have an entirely fresh set of players on the pitch every water break, while our players are nearly passing out from heat exhaustion. We never know the schedule of events until the last minute. It is just a highly disorganized program that is very difficult to work with.”
- “Stop allowing new clubs to open which waters down competitive teams, creates coach shortages, and creates mediocre facilities.”
- “Lee county should work to create a first class amateur sporting leagues in order to attract families.”
- “There is no proper soccer indoor facility (for FUTSAL), or alternative for smaller soccer fields as you see in the east Coast, usually aggregated with soccer fields.”
- “We need more fields soccer in the area. Soccer is becoming a very popular sport and there just is not enough fields to accommodate. You have men's leagues that use the youth league fields and tear them up, making dangerous for the younger players. Then you have these men who just want to have pick up games that sneak onto fields where ever they can get space. Again, making the fields not playable/dangerous for young players. Football and soccer should have separate fields. Football is a lot harder on fields that soccer. We need parks like Jet Blue that is big and can host multiple sports at a time, like baseball and soccer fields or football fields. Lee County could make some major money if we had a multi-purpose complex. The tournaments that we could hold in our area other than baseball at Jet Blue would be huge. We are located to be able to reach the Miami and Tampa area teams. Just a few hours drive is nothing when you are used to traveling that weekly for league games. The hotel and restaurant business would greatly increase. We need a huge multi-spots complex.”
- “The grounds crew for Hammond, JetBlue and terry park deserve MAJOR raises!!! Those guys do such an amazing job and work very long hours! I think it would do management some good to lace up their boots and put in a day's work with those guys.”
- “We participated in the squires soccer league. Our coach was always 30 minutes late and never seemed to actually coach the kids. All the parent s were on the field and it was very unorganized. I'm so upset thy we spent the money and time to come out to a sport that was a waste of time.”
- “Provide fields for unorganized sports like pick up soccer. Stop selling off the soccer fields to local clubs so your community can enjoy the fields and not need permission to use.”



OPEN-ENDED SURVEY COMMENTS (CONT.)

- “There needs to be better soccer facilities. The best club in the area Knights shouldn't have to share facilities at Jet Blue and Bayshore.”
- “I think that Lee County should be a large Sports complex on the Northwest corner of Alico and 75. There is a lot of Land there that could potentially generate a lot of income to our county by attracting large competitive Soccer tournaments. Even lacrosse tournaments. Similar to the North Collier Regional Park does currently.”
- “Ft Myers is in need of additional soccer facilities to account for growth along I-75 between Daniels and Colonial. This is where most of the growth is happening. It is no longer happening along the river or close to the beach.”
- “There are other sports besides Football, Basketball and baseball that can also help our youth. Fencing is one of those, it helps kids to develop their concentration while being a member of a team or club.”
- “Missed comment section on last question. .. I like to fence and have found it a great sport for both young and old alike.”
- “Both fencing and figure skating are Olympic sports for which Lee County, as a whole, does little to support. Fencing is a great, affordable sport, a fencing facility with state-wide promotion would further the interest in the sport. Florida is the largest state in the United States Figure Skating Association, South Atlantic region for figure skating with the largest participation in competitions. Lee County (Fort Myers Skatium) with only one rink available for competitions is missing out in terms of competition revenue. Florida Hospital Center Ice (Wesley Chapel) will open the largest ice facility in the state of Florida in December/January. They are going to attract national and international competitions.”
- “Can we PLEASE have someone clean up the bathrooms at the pools? They are gross and we are at these pools 6 days a week!”
- “The field reservation process needs to be more available for amateur teams.”
- “Skin irritation, crunchy hair and destroyed swimwear...”
- “Someone needs to look into this issue to find a permanent solution!”
- “Fencing.”
- “The chlorine level of the San Carlos Pool is not controlled properly during the winter months when a pool blanket is being used. The chlorine level is too high and a potential danger of swimmers which are in the water regularly for a longer time.”
- “Please give us fencing facilities.”
- “Fencing is an emerging sport with a good base here in Fort Myers. If there was more support from the Lee County community it could really grow. And it is a sport that can be done year round in an indoor facility. That has fantastic benefits because participants avoid some of the things that make outdoor sports here difficult: sun/heat exposure, and exposure to mosquitos. And fencing can be done at any age, similar to tennis.”
- “I think Lee county could use an indoor pool.”
- “Need a 50 M indoor pool in Cape Coral!”
- “Please consider Lee County's eat implementation of the CDC 's Model Aquatic standards so for all pool and aquatic facilities. This will elevate the image, status, and health safety of Lee's aquatic facilities. CDC, Centers for Disease Control, had created an excellent aquatic health model that will benefit our county when implemented. Thank you for conducting this survey.”
- It would be nice to be able to use of the unused baseball fields on Sundays for a men's baseball league as well as needing more large men's baseball fields in Lee County
- More opportunity for different fields to be used for games
- WE need use of the unused fields on Sundays and also need more large men's baseball fields in Lee County.
- I am a retired Teacher and Swimming Coach. One of my goals is to get in better swimming shape. My wife ,my daughter and her family use the San Carlos pool frequently
- I would like to see the availability of baseball fields for adult baseball leagues increase. I feel like Lee County does not allow for adult use of all of the baseball facilities that the county has to offer.



OPEN-ENDED SURVEY COMMENTS (CONT.)

- “My main back ground as a coach and a long time supporter of this community is baseball. Lee County is one of the largest and most desired counties for this sport. My business is called Total Sports Academy in which we train youth in the sport of baseball. We are located off of Alico Rd. My frustration with the county is amateur teams LOCALLY struggle with being able to use the local fields. This year I have been turned down 3 times, trying to use Three Oaks Baseball fields, because of Little League, Perfect Game, and other teams trying to do the same thing. Estero Rec Center has pretty much blocked any other teams from using Three Oaks and the Estero Fields. I have tried to make contact with Irma and Austin to sit down and have a discussion on the monopoly of these fields only to get no response back. Because of this situation, not only with my organization and business, but with other local organizations, we have taken our teams and business out of the county. Collier, Port Charlotte, North Port, Bradenton, St. Pete, and Lakeland just to name a few. I would like to be involved with any county ideas and decision making if possible, any round tables or discussions to help keep these local teams local. I believe the county is loosing their own community support be cause of these situations. My name is Jerriel Filler (*REDACTED*)”
- “I play in the Fort Myers Baseball League, and over the last 10 years we have seen access to quality fields reduced consistently. Growing our league in Lee County is impossible without access to quality fields; county parks with little to no proper maintenance or preparation takes away from what we're trying to do, and it is not necessary to be prevented from using the best fields because of a small possibility of another event needing them as a contingency. I am in favor of the flex schedule, where we would have access to the best fields with the understanding that we would be cancelled or rescheduled if those fields become needed by a larger event on Sundays, which is when we play.”
- “Unlock Fields and Let the kids practice. Little Leagues keep people from learning the game by locking its fields.”
- “Nice logo.”
- “Adult baseball within the Lee county community is underrated in it's ability to generate money and tax dollars. Access to more fields for adult baseball should be prioritized.”
- “Fields are not being utilized or available for others when not being used. The quality of the fields have been steadily declining since it started playing when I was a child. Scheduling has not taken advantage of the opportunity for other leagues to play on better facilities. We have to resort to playing on smaller and less quality of fields. There are plenty of nice fields to play on, but we are stuck playing the same field every week with terrible conditions.”
- “I believe that the baseball fields that are not being utilized on Sundays, specifically the nicer fields, should be open to other organized baseball clubs. I.e. Fort Myers Men's Baseball League.”
- “Lack of public swimming pools that are accessible to adults. As far as I know there are 2 main pools, FGCU pool which is great but out of the way for many of us and the FM Aquatic Center which I am afraid of my car getting broken in due to the neighborhood and past incidents.”
- “Need sun shelters, and turf soccer fields. Indoor facility as we are the lighting capital.”
- “I believe the lightning detectors are too strict. We've had storms pass through and still be delayed if lightning strikes 9.9 mi away although the danger has passed.”
- “Would also like to see Kelly Road Soccer Complex lighting be fixed. Nearly every light post is missing 2+ bulbs.”
- “Need Soccer Fields.”
- “Thanks for the commitment to sports. Please continue to improve and update facilities to attract the most desirable events.”
- “Need more fields for Travel Baseball and more shade facilities at the existing parks.”



CONTACT INFORMATION



VICTUS ADVISORS LLC

2720 Homestead Rd. #130
Park City, Utah 84098

(435) 604-0874

www.victusadvisors.com