



# Eco-Historic Planning Study - Update

Presented to:

Village of Estero  
Planning, Zoning and Design Board

Presented by:

LandDesign

Date: March 10, 2026

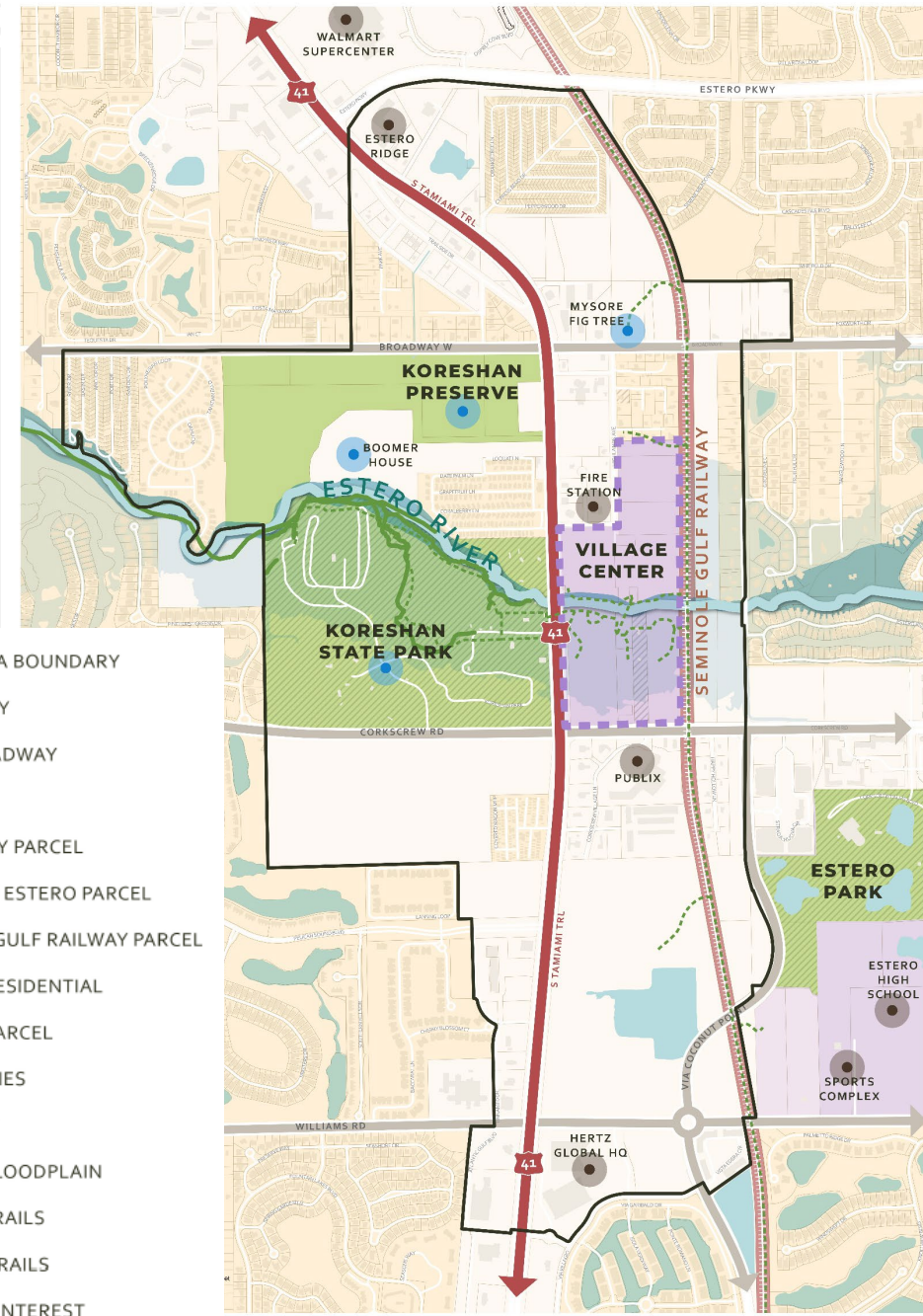


# AGENDA

- Study Area
- Timeline
- Additional Engagement + Input
- Market Demand Overview
- Initial Recommendations + Strategies
- Next Steps
- Discussion

# Study Area

- 1,000+ Acres
- Includes Estero River and several historic sites + conservation areas
- Publicly owned property (Village, State and County)
- Along the US-41 corridor
- Planned BERT corridor



# Timeline

- Initial Open House: June 24<sup>th</sup>
- PZD Board Meeting: Nov. 18<sup>th</sup>
- Second Round of Engagement: March 10-11<sup>th</sup>
- Overall timeline: 12 months

## THE PLANNING PROCESS

MAY 2025

MAY 2026

### Phase 1: Discovery

- Collect data
- Map upcoming development, opportunities, and challenges
- Conduct a market demand analysis

### Phase 2: Engagement

- Interview Village Council members
- **Community Open House** (June 24, 2025)

### Phase 3: Visioning

- Analyze the feedback from Phase Two to generate a gap analysis and guiding principles
- **PZD board presentation** (November 18, 2025)
- Develop an economic & land development strategy

### Phase 4: Engagement

- Re-interview Village Council members
- **2nd PZD board presentation**
- **2nd Community Open House**

### Phase 5: Adoption

- Prepare the Eco-Historic Planning Report with prioritized strategies
- Village Council presentation

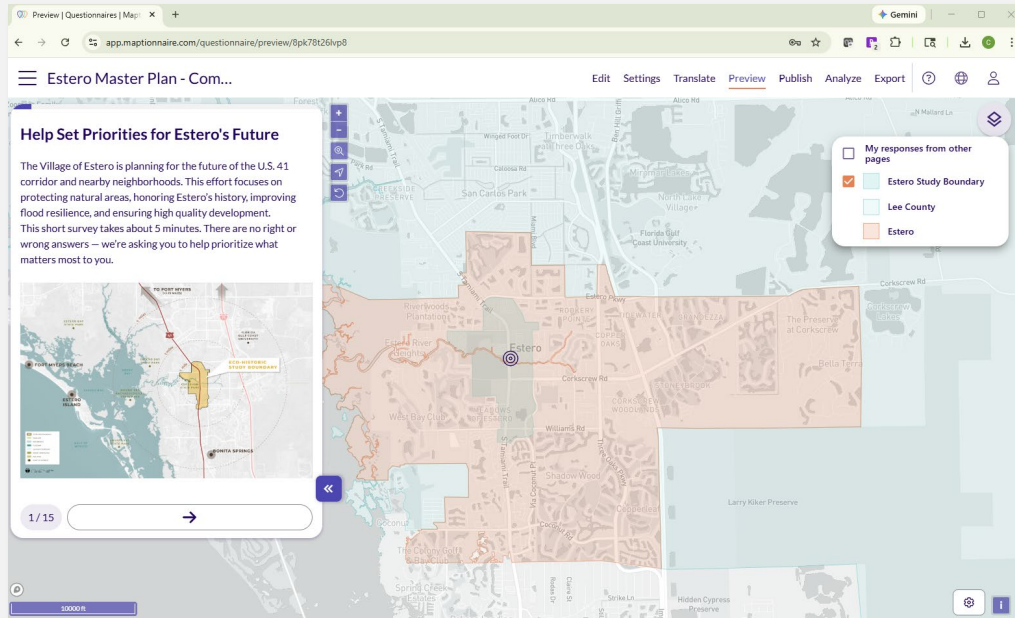


An architectural rendering of a modern, multi-story building at night. The building features a mix of brick and stone facades with arched windows. In the foreground, there are several palm trees and a playground with colorful equipment. The scene is illuminated by streetlights and building lights, creating a warm, urban atmosphere. The text "Additional Engagement + Input" is overlaid in the center in a bold, white, serif font.

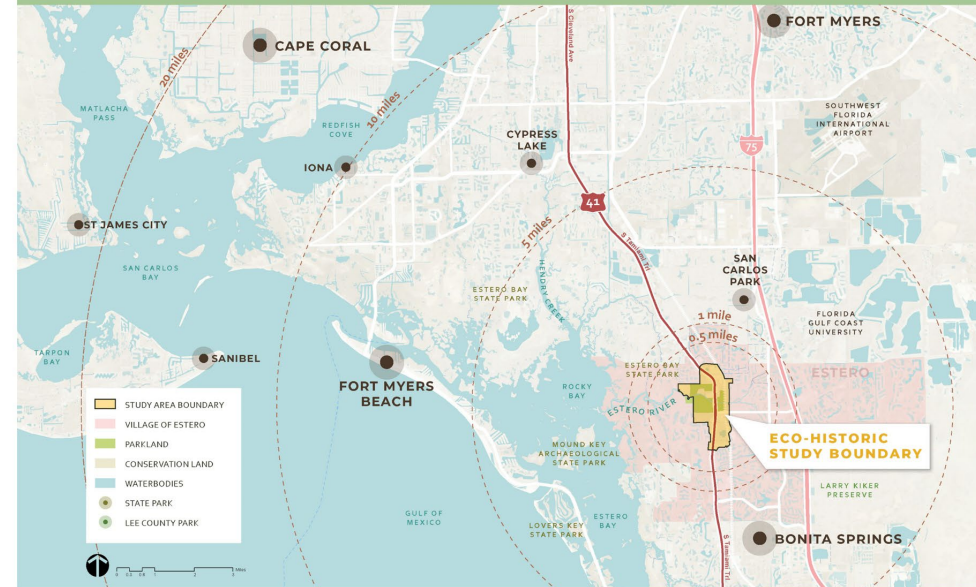
# Additional Engagement + Input

# Online Survey

## January 2026



## Your Village. Your Vision.



### Scan the QR Code to Complete the Survey

Your ideas will help shape the vision and design of the Village of Estero's Eco-Historic Planning Study.

**SURVEY ENDS FRIDAY, JANUARY 30TH**

# Online Survey

## Who Participated in the Online Community Survey?

- » Predominantly older, long-term residents
- » High familiarity with Estero
- » Strong investment in community outcomes

**91%**

OF SURVEY  
RESPONDENTS  
LIVE IN ESTERO.

**12% OF RESPONDENTS WORK IN ESTERO.**

**12% OF RESPONDENTS VISIT OFTEN.**

**1% OF RESPONDENTS VISIT OCCASIONALLY.**


**1% OF RESPONDENTS JUST PASS THROUGH ESTERO.**

Most survey responses come from the 33928 zip code, which is consistent with the Estero area.



The online  
survey received

**1,736**

responses! 

**25%**

OF SURVEY  
RESPONDENTS  
ARE UNDER

**55**

YEARS OLD

Age representation is strong.

ESTERO'S  
MEDIAN AGE IS

**65.7**

YEARS OLD

**50%**

OF THE  
POPULATION IS

**65+**

**57%**

OF SURVEY  
RESPONDENTS ARE

**65+**

Homeowners were well represented. Renters (often younger households / workforce households) may be underrepresented in the response pool.

**84%**

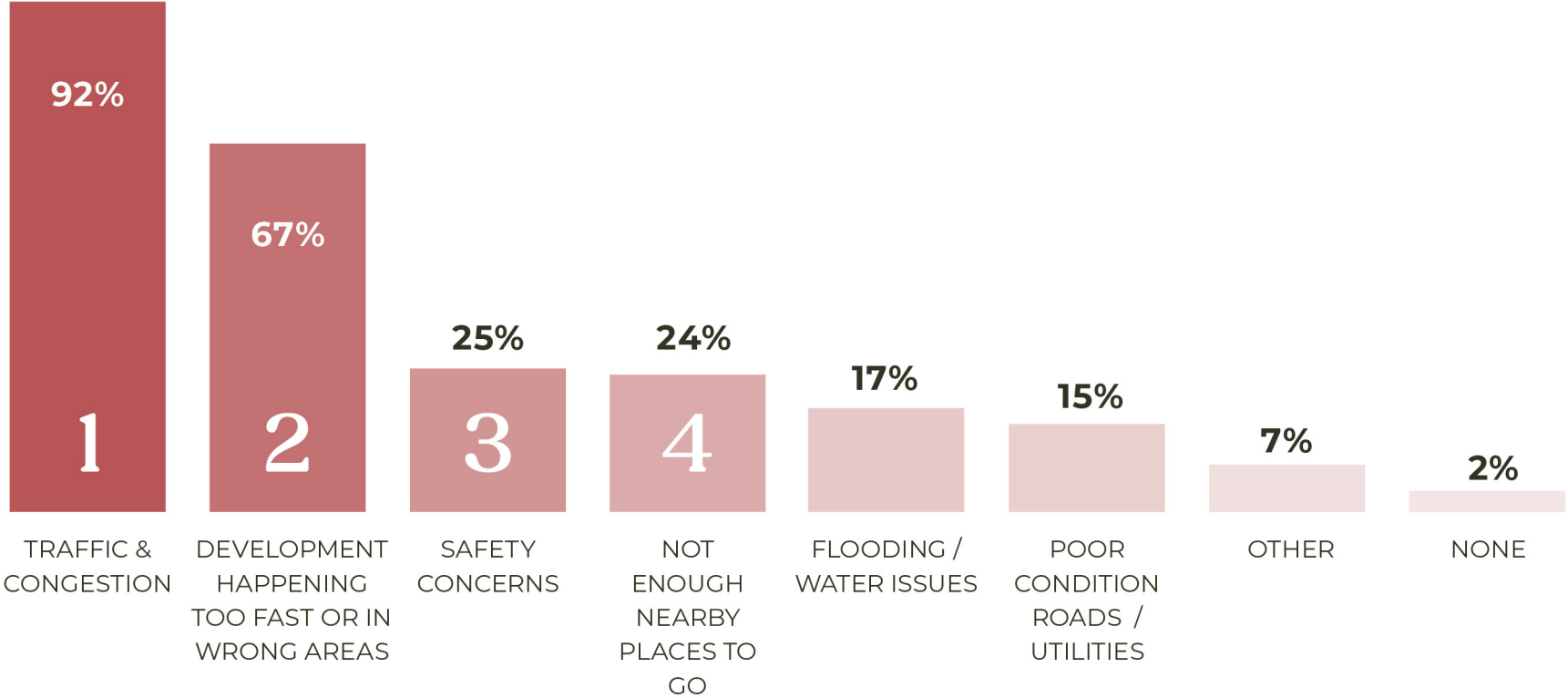
OF THE  
POPULATION  
OWNS A HOME

**95%**

OF SURVEY  
RESPONDENTS ARE  
HOMEOWNERS

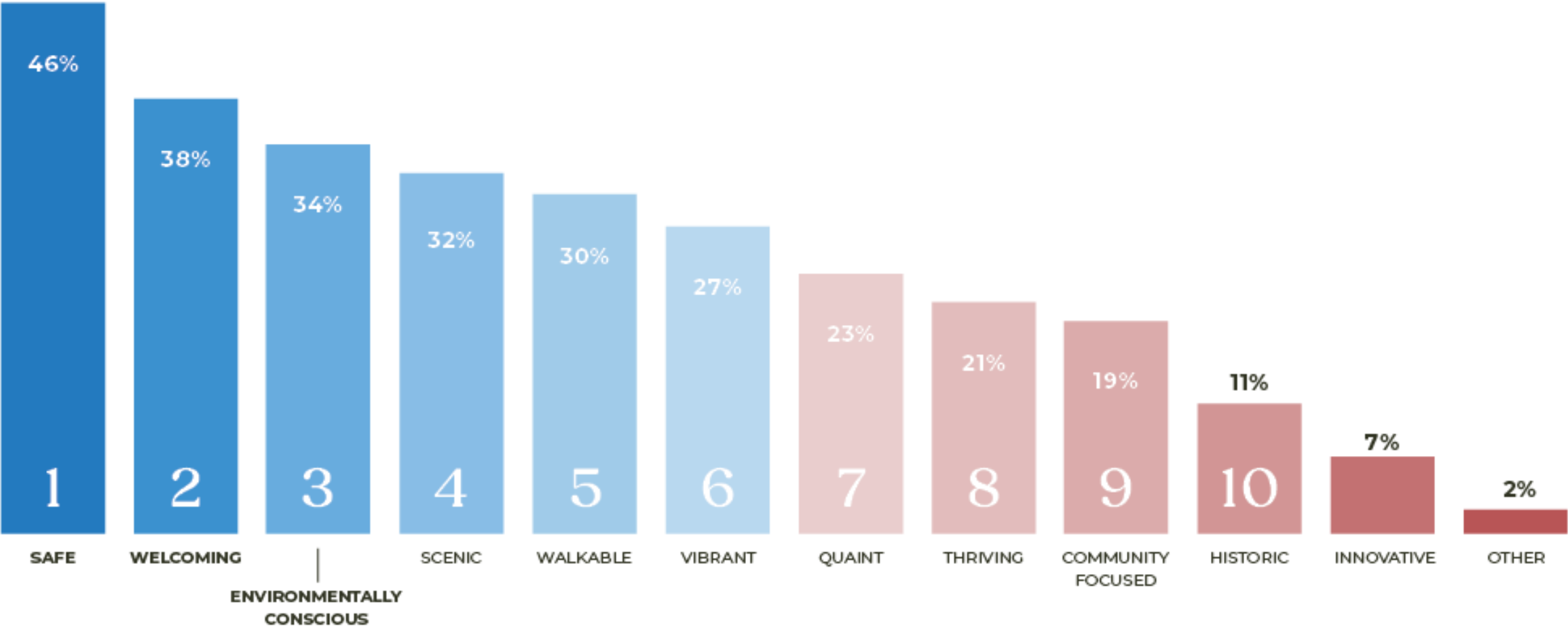
# Online Survey

## WHAT CHALLENGES EXIST IN ESTERO TODAY?



# Online Survey

WHAT WORDS BEST DESCRIBE HOW YOU WOULD LIKE ESTERO TO FEEL IN THE FUTURE?



# Online Survey



## ECONOMIC RESILIENCE CONSIDERATIONS

People want local serving, walkable destinations rather than car-oriented commercial strips.

Several responses reinforce a preference for quality over quantity in development. Repeated mentions of walkability, shade, seating, and safety in responses indicate that people want a social space first, not just a retail district.

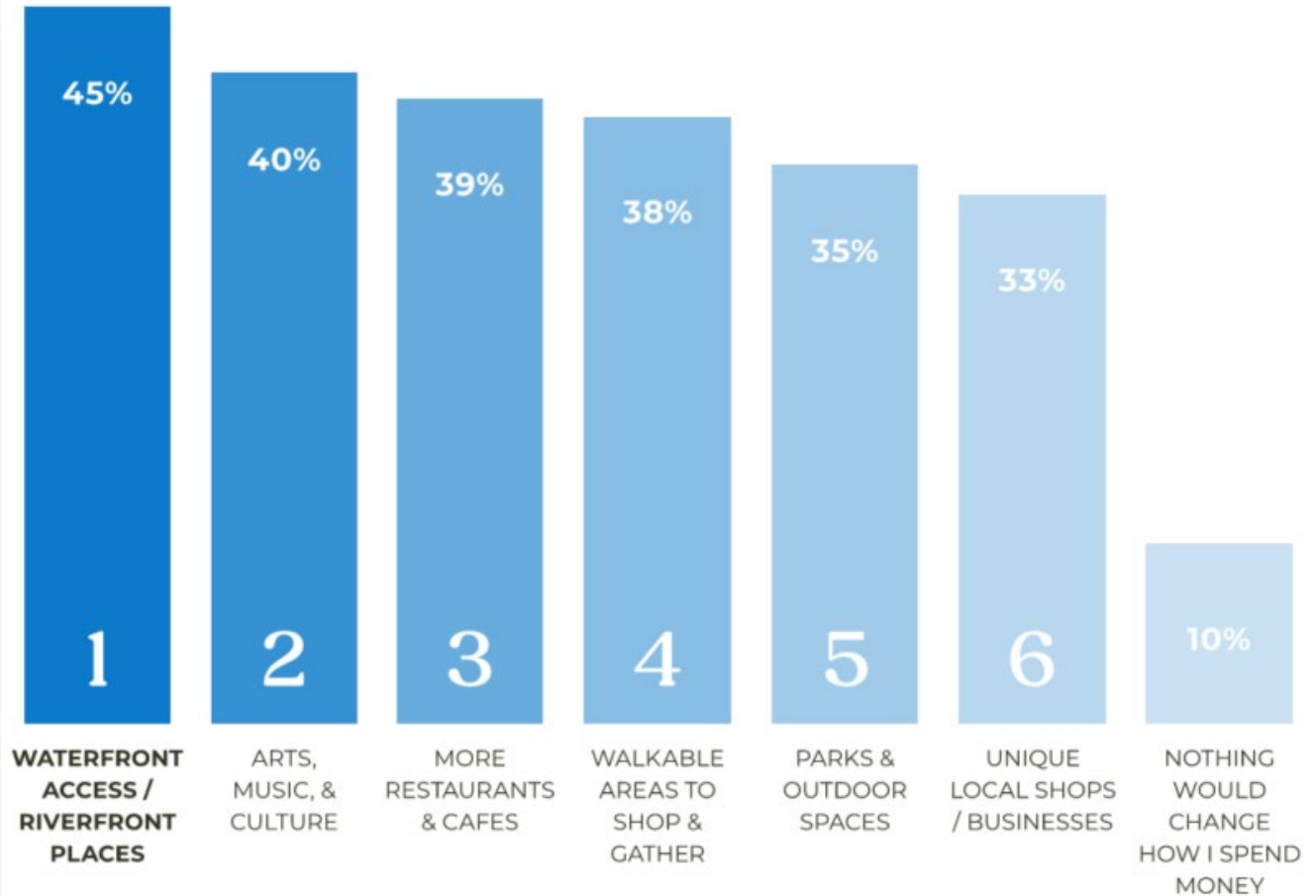
**67%**

OF RESPONDENTS SAID THAT DEVELOPMENT IN ESTERO IS HAPPENING TOO FAST AND/OR IN THE WRONG AREAS.

### WHAT TYPES OF DEVELOPMENT DO PEOPLE WANT TO SEE IN ESTERO?

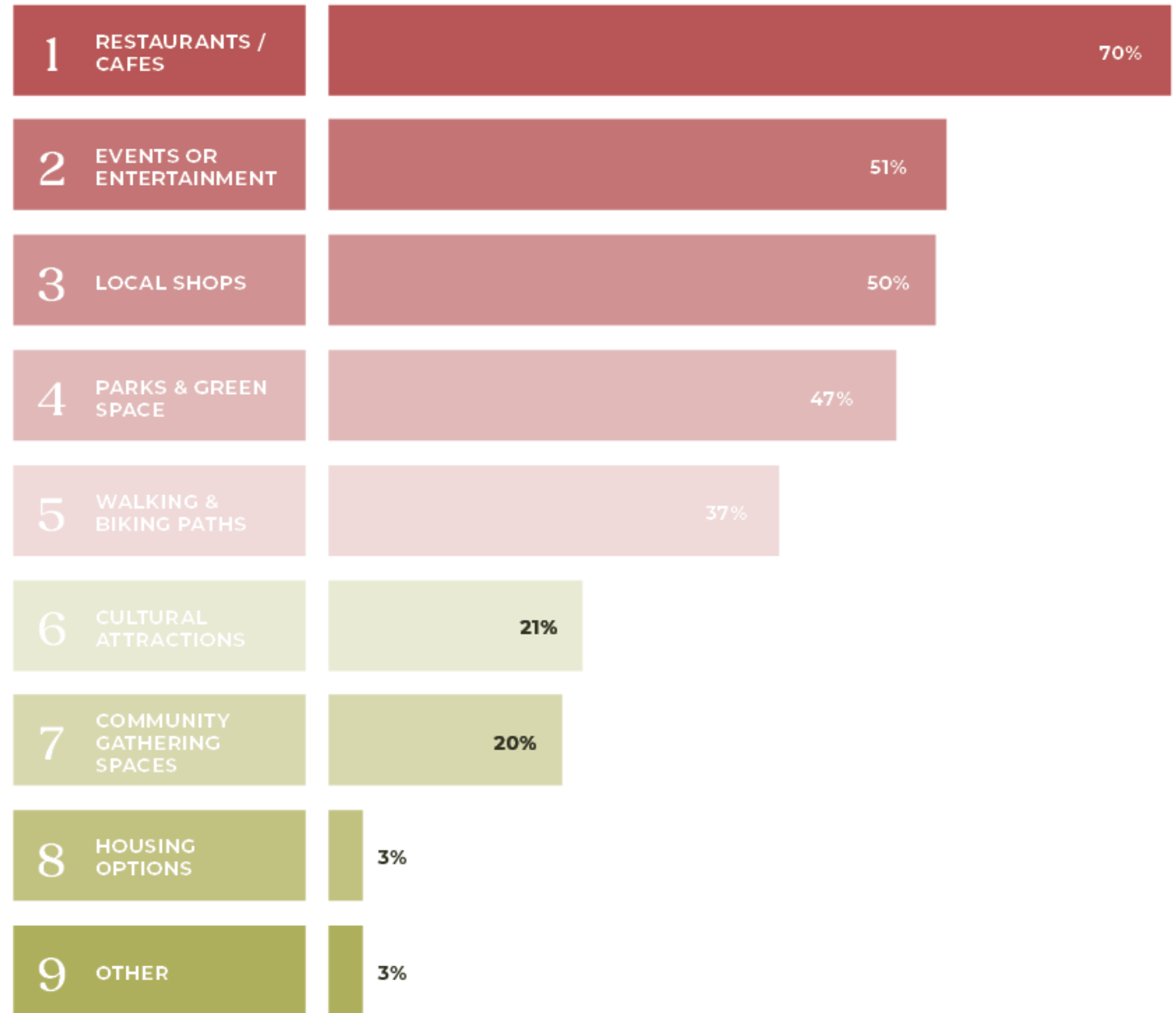
- Civic and institutional (spaces to gather, learn, and access services)
- Commercial and mixed-use areas that enhance quality of life and local culture
- Parks and public space
- Hospital and assisted living facilities, to better support residents aging in-place
- Residential development was identified as less of a priority, except for senior housing

## WHAT WOULD MAKE YOU SPEND MORE TIME & MONEY IN ESTERO?



# Online Survey

## IF ESTERO HAD A DOWNTOWN, WHAT WOULD YOU WANT TO SEE THERE?



# Online Survey



## ENVIRONMENTAL RESILIENCE CONSIDERATIONS

People consistently prioritize amenities that support experience, access, and connection to nature.

The community wants Estero to be safe, connected, and rooted in its natural setting, supported by walkable streets, shared civic spaces, and well-integrated infrastructure. Investment in parks and recreation infrastructure is seen as a direct investment in quality of life, according to respondents.

**59%**

OF RESPONDENTS EXPECT ENVIRONMENTAL STEWARDSHIP TO GUIDE DECISION-MAKING IN ESTERO.

“

“Preserve what makes Estero beautiful – the river, trees, and open space.”

“Protect the natural environment and green spaces.”

“Smart growth that doesn’t destroy what we love about Estero.”

”

## HOW DO PEOPLE WANT TO EXPERIENCE NATURE IN ESTERO?



16%



16%



11%



9%

TRAILS

1

ACTIVE RECREATION

2

STREETSCAPE TREATMENTS

3

ADDITIONAL TREE CANOPY

4

## WHAT'S MISSING IN ESTERO?

**62%**

OF RESPONDENTS SAID WALKING & BIKING TRAILS

**54%**

OF RESPONDENTS SAID PARKS & GREEN SPACE

**46%**

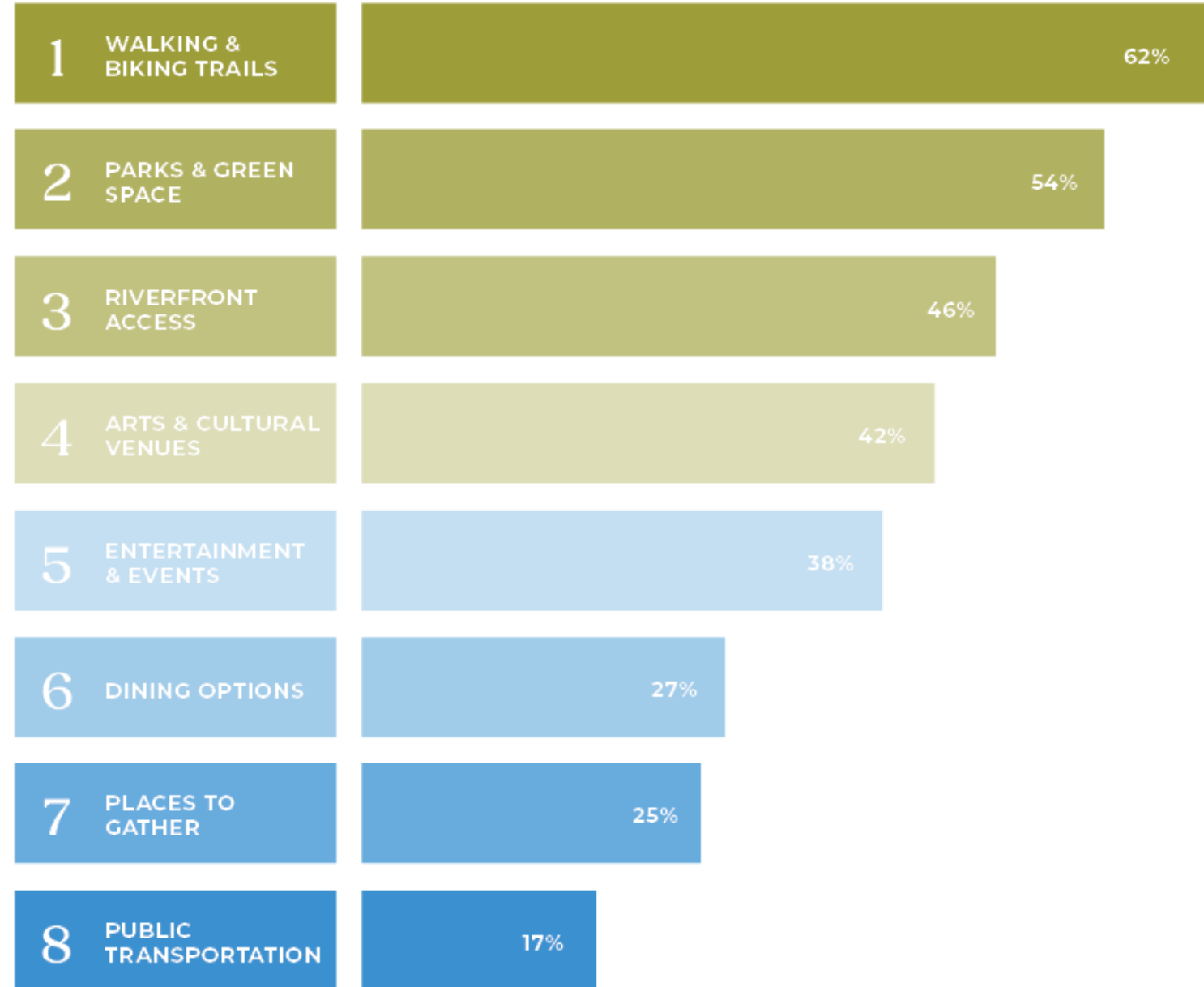
OF RESPONDENTS SAID RIVERFRONT ACCESS

**49%**

OF SURVEY RESPONDENTS HAVE NOT SPENT TIME AT THE ESTERO RIVER.

# Online Survey

## WHAT'S MISSING IN ESTERO?



# Online Survey



## SOCIAL & GENERATIONAL RESILIENCE CONSIDERATIONS

Traffic and congestion are a dominant challenge by a wide margin, far outpacing all other concerns.

Development patterns and safety concerns are experienced as part of the traffic problem, rather than separate from it. More than just congestion, the lack of safe alternatives to driving may intensify frustration and limits daily mobility.

**92%**

**OF RESPONDENTS SAID THAT TRANSPORTATION & CONGESTION IS A MAJOR CHALLENGE IN ESTERO.**

“

“Traffic is terrible, especially during season and rush hour.”

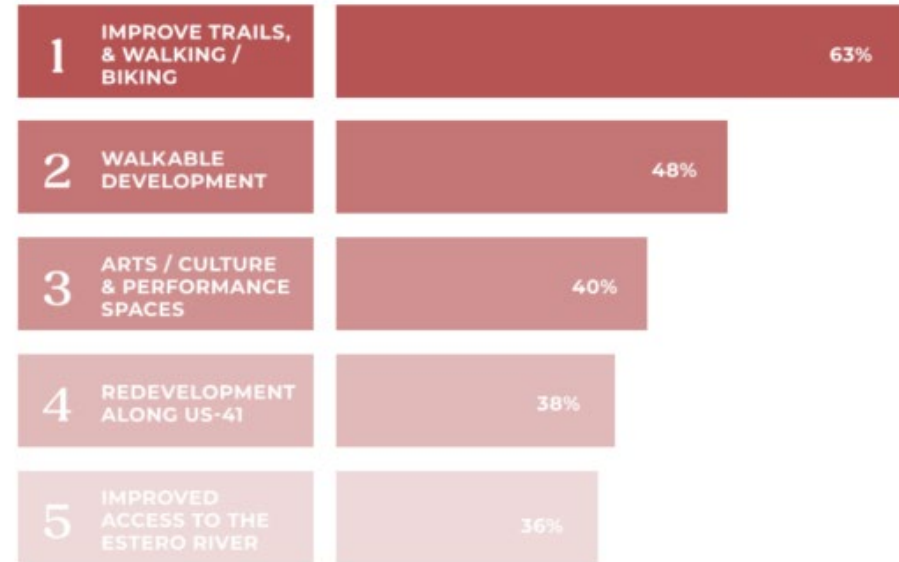
“Very difficult and unsafe to walk or bike in most areas.”

“Too many cars, not enough planning for roads and crossings.”

“You have to drive everywhere — there are no safe alternatives.”

”

## WHAT DO PEOPLE THINK WILL HAVE THE GREATEST IMPACT ON IMPROVING QUALITY OF LIFE IN ESTERO?



**55%**

**OF SURVEY RESPONDENTS THINK IT IS VERY IMPORTANT THAT GROWTH IN ESTERO REFLECTS ITS HISTORY & NATURAL ENVIRONMENT.**

Walking and biking trails are the single most cited gap.



“

“Connected, not fragmented.”

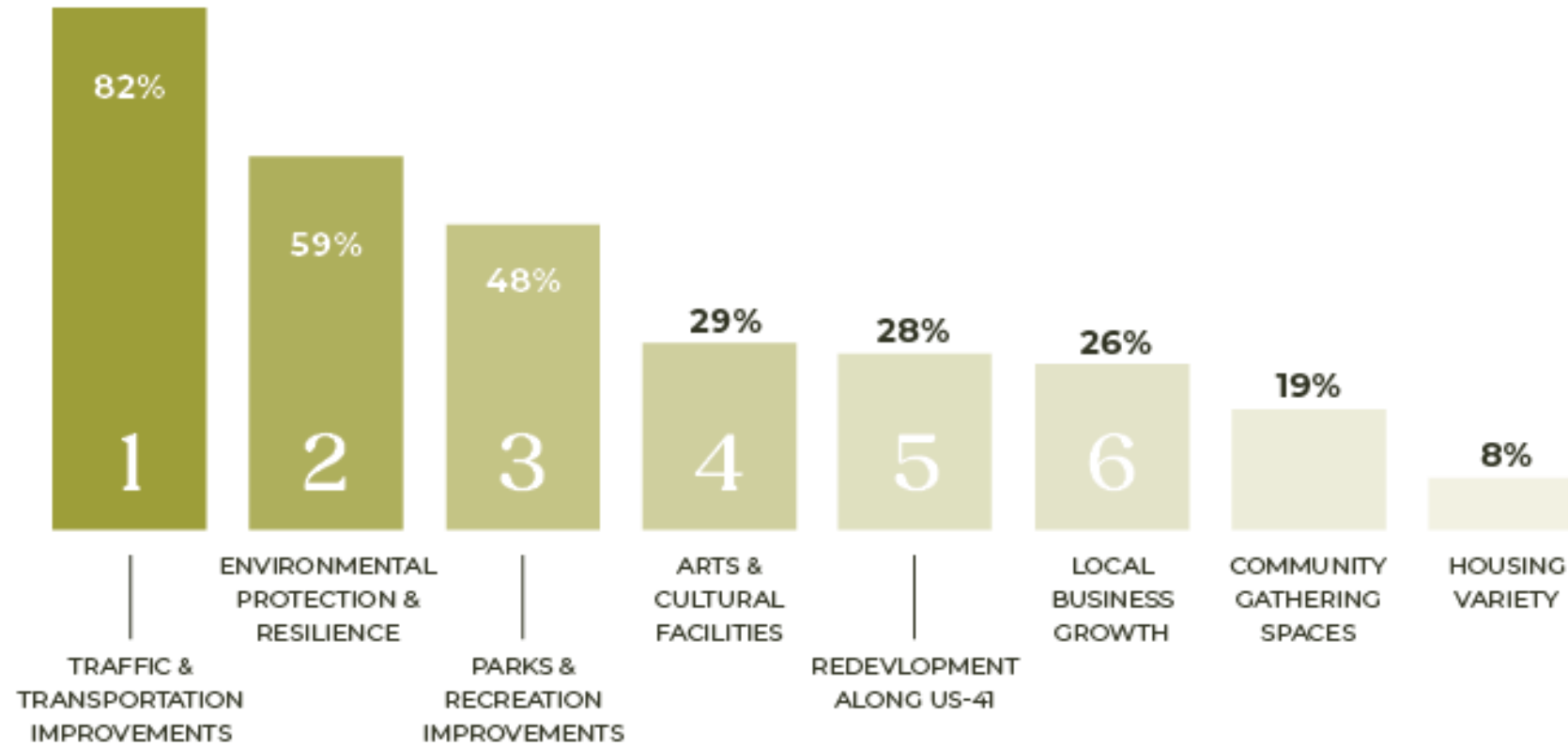
“A place where you can walk & bike without feeling unsafe.”

“A place where people feel connected to each other.”

”

# Online Survey

## TOP 3 PRIORITIES



# Summary of Overall Input

## What We Heard: Vision

### Culture & Community Gathering

- » "Arts Center"
- » "Community garden next to Estero Recreation Center and indoor farmer's market"
- » "Performing arts center!"
- » "Museum"
- » "Aquatic complex [for] kids and adults"

Shows a strong desire for civic amenities that bring people together, support lifelong learning, and strengthen community identity.

### Infrastructure & Connectivity

- » "Utilities on East Broadway including Tanglewood Lake"
- » "Alt[ernative] transportation... and business"
- » "Improved traffic issues"
- » "Connected to BERT!"

Emphasizes the importance of safe, efficient, and multi-modal connections supported by well-maintained infrastructure.

### Small Town Character & Vibrant Village Life

- » "Small town community charm, shops, restaurants, and lights"
- » "Accent lighting"
- » "Maintain character trees"
- » "[Streets] lined with oaks or tall trees"

Reflects a wish to preserve and enhance Estero's village-scale charm with shops and design details that create a lively and welcoming atmosphere.

### Landscape & Environmental Mindfulness

- » "More color in plants!"
- » "Be more mindful [of] native animals"
- » "[Improve] road landscaping"
- » "*Maintain character trees*"
- » "*[Streets] lined with oaks or tall trees*"

Indicates that residents deeply value the natural environment and want to see it reflected in daily life, respective of local ecology.

## Comparing What We Heard about Vision at the Community Open House:

Together, responses from the survey and Open House reinforce a consistent and actionable vision. The community is asking for a future that feels **safe, connected, and rooted in its natural setting, supported by walkable streets, shared civic spaces, and well-integrated infrastructure.** Growth is supported when it strengthens these qualities rather than competes with them.

# Summary of Overall Input

## What We Are Hearing Consistently So Far:

- » Traffic and congestion dominate daily experience
- » Growth perceived as outpacing infrastructure
- » Environmental and water concerns are widespread

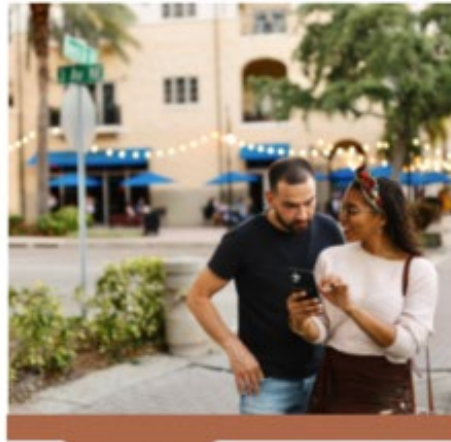
## What Residents Want More Of:

- » Walkable, connected destinations
- » Local amenities and gathering places
- » Development that supports daily life

## What This Means for Planning:

- » Infrastructure-first mindset
- » Targeted, feasible economic development
- » Strong support for environmental stewardship

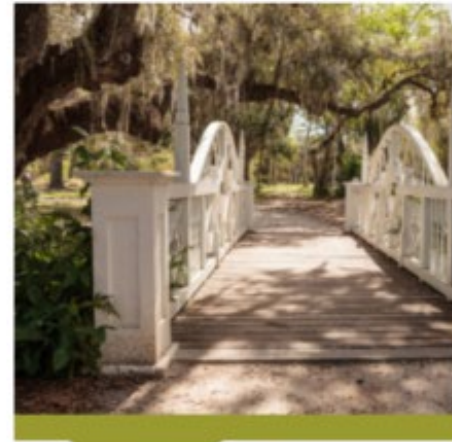
# Planning Principles



## Balance Growth with Preservation

Shape future development to enhance Estero's character while meeting evolving needs.

- » Guide new development to fit within the existing fabric and elevate quality standards.
- » Maintain small-town charm while accommodating growth.



## Celebrate Culture + Character

Infuse public spaces with Estero's identity and heritage.

- » Highlight historic sites, traditions, and local stories in parks and cultural spaces.
- » Express Old Florida vernacular and cultural heritage through architecture, design, and public spaces.



## Protect & Enhance Natural Assets

Safeguard and integrate Estero's natural resources through sustainable design solutions.

- » Preserve waterways, habitats, and native landscapes.
- » Use hydrology and green infrastructure to protect wetlands, manage stormwater, and support ecosystems.
- » Strengthen community connections to nature and recreation.

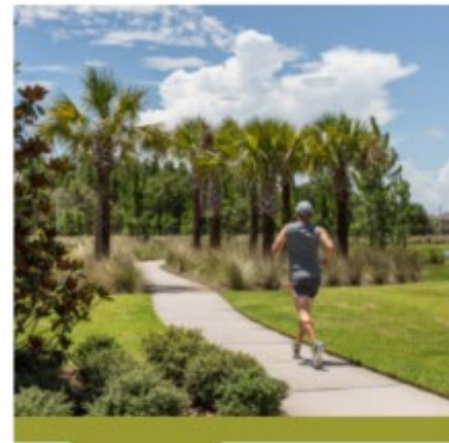
# Planning Principles



## Foster a Strong Sense of Place

Design welcoming spaces that build community pride and connection.

- » Design streets, parks, plazas, and gathering areas that encourage interaction and shared experiences.
- » Integrate human-scale design that prioritizes comfort, safety, and accessibility for all ages and abilities
- » Reinforce a consistent village character through cohesive design elements.



## Connect People + Places

Design safe, accessible networks that link neighborhoods, nature, and culture.

- » Establish continuous pedestrian and bicycle connections linking neighborhoods, town centers, and ecological areas.
- » Promote mobility, health, and social interaction through walkable and bikeable design.



## Plan for Generational Resilience

Design with adaptability and longevity to serve all ages for decades to come.

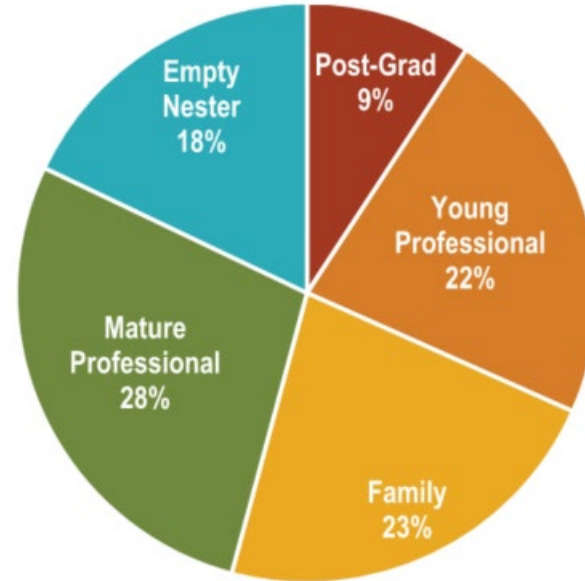
- » Ensure development is adaptable, sustainable, and benefits the community long-term.
- » Incorporate design strategies that are inclusive for all ages and support residents “aging in-place.”

An aerial photograph of a lush green mangrove wetland. A dark, winding waterway cuts through the dense forest of mangrove trees. In the background, a body of water extends to the horizon under a cloudy sky. The text "Market Demand Overview" is centered in white, bold, serif font over the middle of the image.

# Market Demand Overview

# Market Demand Study

Renter Demand by Life Segment in Lee County



Land Use	Site Fit (One or More Sites)	Near-Term (<5 Years) Demand Based on Comps / Pipeline	Long-Term (>5 Year) Demand Based on Market Trends
Multifamily / Rental Residential	Strong	Moderate	Strong
Retail	Moderate/Strong	Moderate/Strong	Moderate/Strong
Medical Office	Moderate/Strong	Moderate/Strong	Moderate/Strong
Traditional Office (Class B)	Moderate	Moderate/Weak	Moderate
Hospitality	Moderate/Strong	Moderate/Weak	Moderate

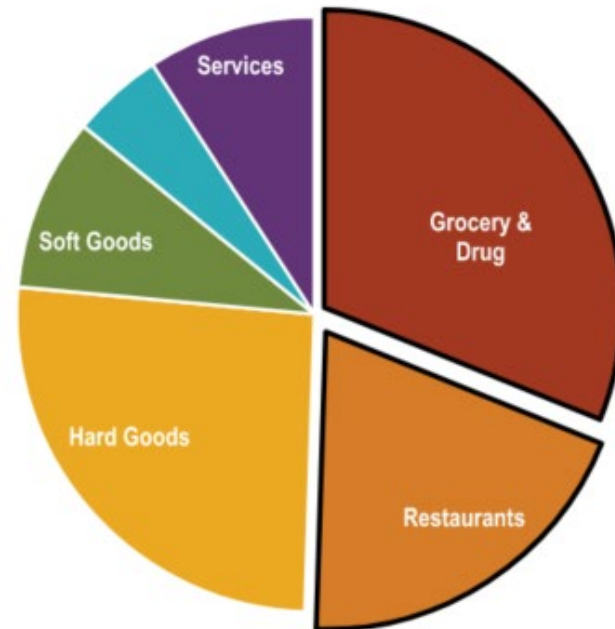
# Market Demand Study

## RETAIL DEMAND AND SURPLUS ANALYSIS

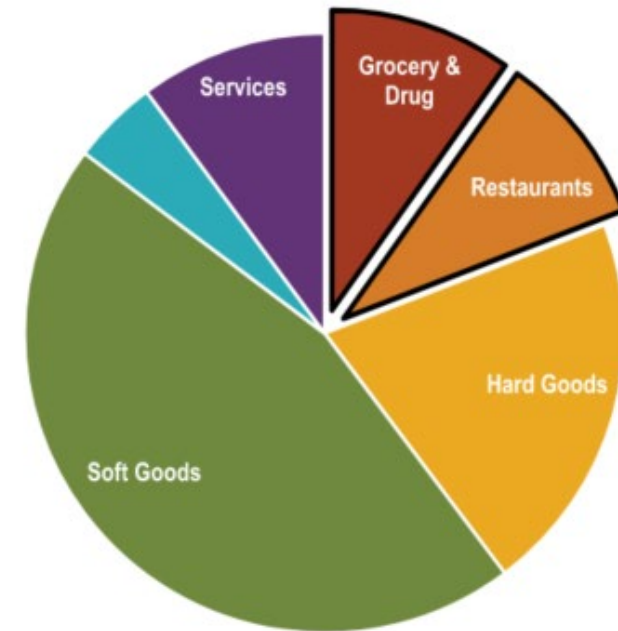
Currently, there is a mismatch between market demand (based on spending trends) and existing supply within the Village of Estero, which has a larger degree of soft goods retailers than those focused on the daily needs of nearby residents (i.e. grocery, restaurants, services, entertainment, etc.)

- ▶ The Village of Estero currently has a significant concentration of soft goods retailers associated with the Miromar Outlets, a regionally serving shopping destination. While this serves a much broader market, there are fewer retail offerings aimed toward local households and residents.
- ▶ It is likely that there is a near-term opportunity for food-and-beverage-oriented retail, such as grocery and restaurant retail, targeted toward the needs of local households.

Retail Structural Demand by Category, 2025;  
Primary Market Area



Retail Occupied Space by Category, 2025;  
Primary Market Area



# Market Demand Study

## MEDICAL OFFICE DEMAND

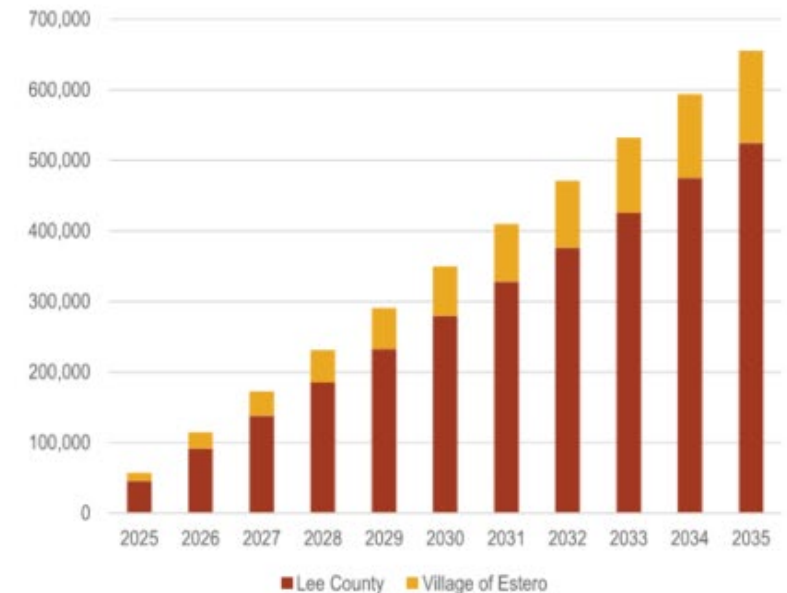
**There is likely additional demand for over 130,000 square feet of medical office space in Estero through 2035, in addition to the nearly 75,000 square feet of undersupply in comparison to Lee County overall**

- ▶ Estero's medical office inventory remains limited relative to its household base and age profile, creating a near-term opportunity for additional development. The village currently supports approximately 23 square feet of medical office space per household, compared to 27 square feet per household countywide, despite having an older resident population that tends to generate higher healthcare utilization rates.
- ▶ As a result, many residents must travel to Fort Myers or Bonita Springs for medical services, contributing to an estimated current undersupply of roughly 75,000 square feet of medical office space in Estero. Looking ahead, RCLCO projects demand for an additional 130,000 square feet of medical office space through 2035, or approximately 11,000 to 13,000 square feet annually, based on expected household growth.

**Medical Office Over/Under Supply;  
Estero, Lee County; 2025**

	Estero	Lee County
Households (2025)	20,339	254,036
Medical Office SF (Inventory in 2025)	465,084	6,743,708
Medical Office Space / Household	22.9	<b>26.5</b>
Medical Office Space Supportable at Lee County Level of Space/Household	539,925	
<b>Potential Undersupply of Medical Office in Estero</b>	<b>74,841</b>	

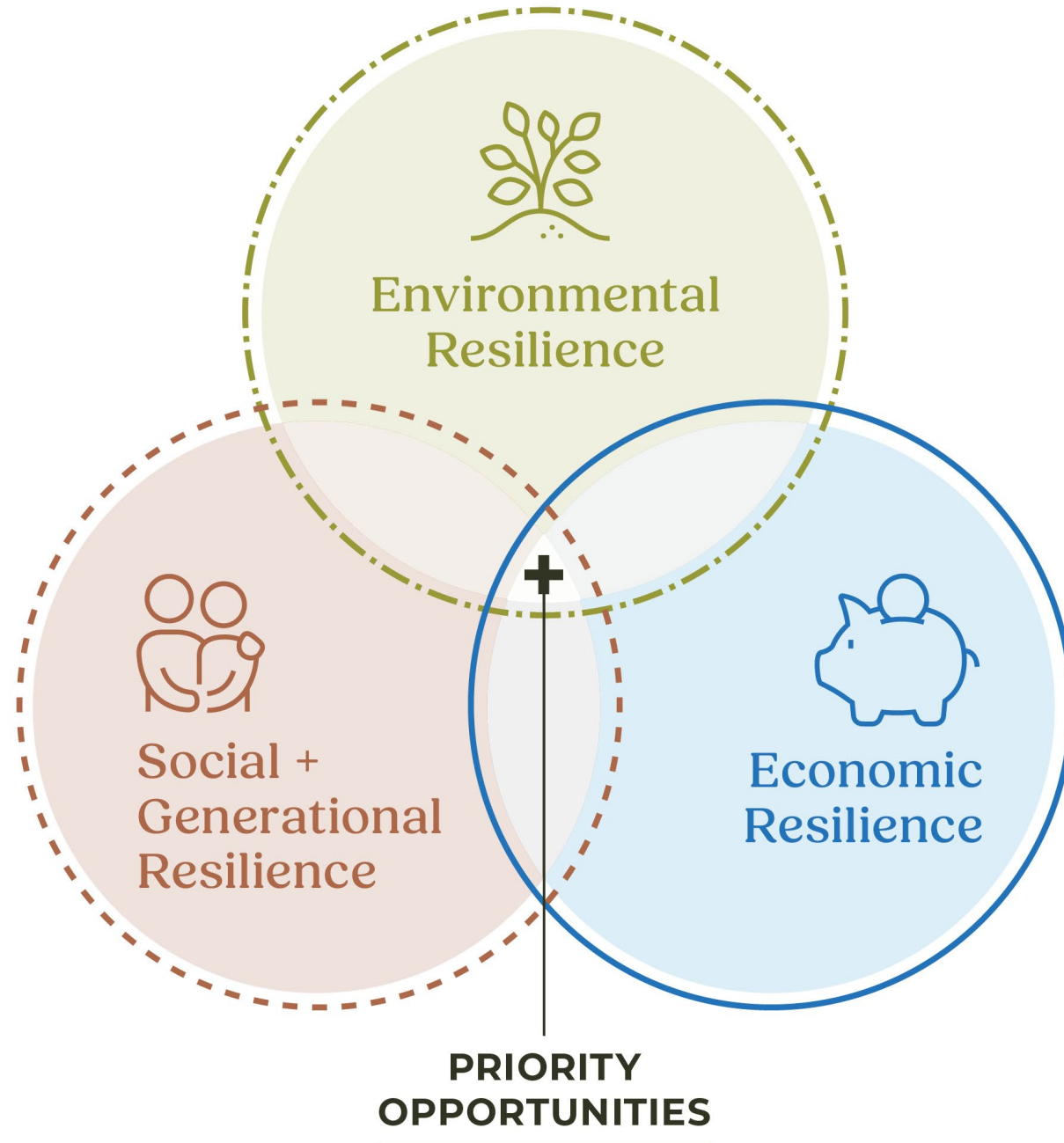
**Medical Office Cumulative Structural Demand;  
Lee County, Estero; 2025-2035**





# **Initial Recommendations + Strategies**

# Resilience Framework



# Strategic Economic Actions

- Targeted reinvestment sites
- Develop a vision for catalyst sites such as the Village Center
- Provide open space and places for the community to gather
- Provide walkable districts to support local restaurants and businesses
- Evaluate eco-tourism and heritage tourism related to parks and trails
- Provide opportunities for housing diversity and aging in place



# Strategic Environmental Actions

- Reinforce river corridor buffers
- Focus on river opportunities
- Align development footprint outside expanded flood risk
- Preserve wetlands as protective infrastructure
- Integrate flood-compatible land use standards



# Strategic Open Space + Connectivity Actions

- River Access and Trail
- Public Spaces and Green Corridors
- Open Space Identity and Guidelines
- Connectivity improvements
- Mobility and Intersection priorities
- US-41 Streetscape
- BERT corridor and linear greenway standards





# Next Steps

# Next Steps

- 2<sup>nd</sup> Public Open House – ***tomorrow March 11<sup>th</sup>***
- Continue to develop more specific strategies to address...
  - Transportation +connectivity solutions
  - Walkability and multimodal opportunities
  - Village Center activation
  - Leveraging the BERT Corridor
  - Leveraging environmental, recreation, and cultural resources
- Potential catalyst sites for development/ redevelopment
- Finalize the Master Plan report



# Thank you



**LandDesign.**  
CREATING PLACES  
THAT MATTER.