

LAKE NONA TOWN CENTER

AN ORLANDO SHOPPING, DINING AND ENTERTAINMENT DESTINATION



TOWN CENTER

LAKE NONA



TAVISTOCK
DEVELOPMENT COMPANY

Discover Lake Nona – Orlando, Florida

Located in Southeast Orlando, Lake Nona is a 17-square-mile, integrated and collaborative community designed from scratch. Located in the City of Orlando, Lake Nona is anchored by clusters of excellence in health and life sciences, sports and performance, education and technology, and is one of the nation’s fastest growing and most innovative residential and commercial hubs in the Southeast.

ORLANDO QUICK FACTS

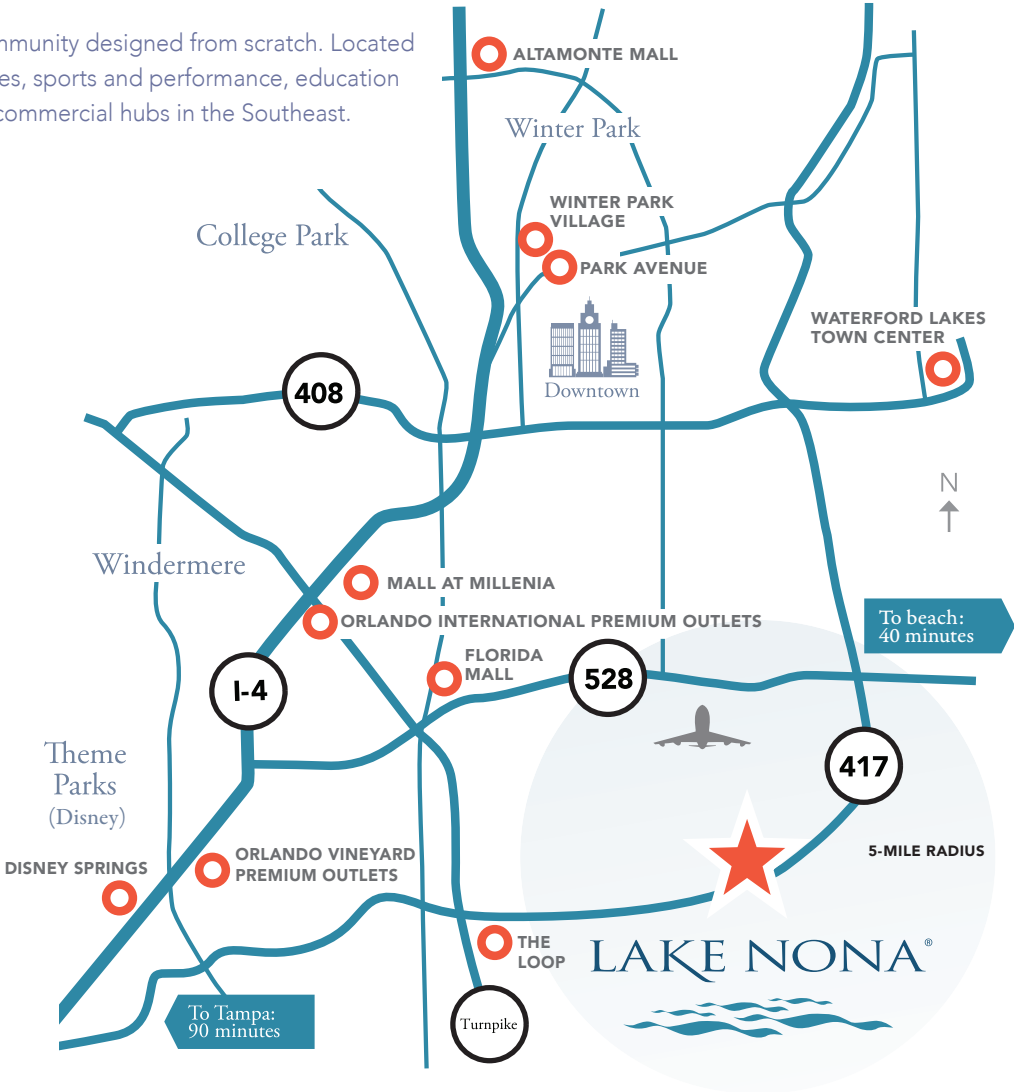
2.4 Million people in the Metro Area
68 Million visitors annually, most visited city in the world with an economic impact of more than \$50 billion
Orlando Airport (MCO) 42 Million visitors annually
#1 Metro Area for job growth (2016 U.S. Department of Labor, Bureau of Labor Statistics)
2nd Most Competitive Location for Business in the U.S. (KPMG 2016)
4th Most Popular American City based on where people want to live (Pew Research)
4th Happiest Place to Work in the U.S. (Forbes)
2nd Largest Convention Center in the U.S.
2nd Largest University in U.S. in terms of enrollment (UCF) with 64,318 in 2016
Largest Collection of Theme Parks in the world
2 Major League Professional Sports Teams Orlando Magic (NBA) and Orlando City (MLS)

LAKE NONA DRIVE TIMES

Orlando International Airport	10 mins
Downtown Orlando	20 mins
Waterford Lakes Town Center	20 mins
Florida Mall	20 mins
The Loop	20 mins
Mall at Millenia	25 mins
Park Avenue (Winter Park)	35 mins
Area Theme Parks	40 mins
Disney Springs	40 mins
Atlantic Coast Beaches	40 mins



The Beacon and Code Wall at Lake Nona Town Center



GET TO KNOW LAKE NONA

17-square-mile, master-planned development in southeast Orlando

13,000+ residents and 5,000 on-site employees, and will
include millions of square feet of commercial, office, hotel,
restaurant, and retail space

Among fastest-selling U.S. master-planned communities
(RCLCO 2016)

650-acre Lake Nona Medical City with more than 5,000+ employees to date

Adjacent super-regional transportation includes Orlando International Airport and planned All Aboard Florida's high-speed train, Brightline

USTA's Home of American Tennis National Campus
with 100 courts, the world's largest tennis complex on 64-acres

Future home to Orlando City Soccer Club's state-of-the-art, training facility

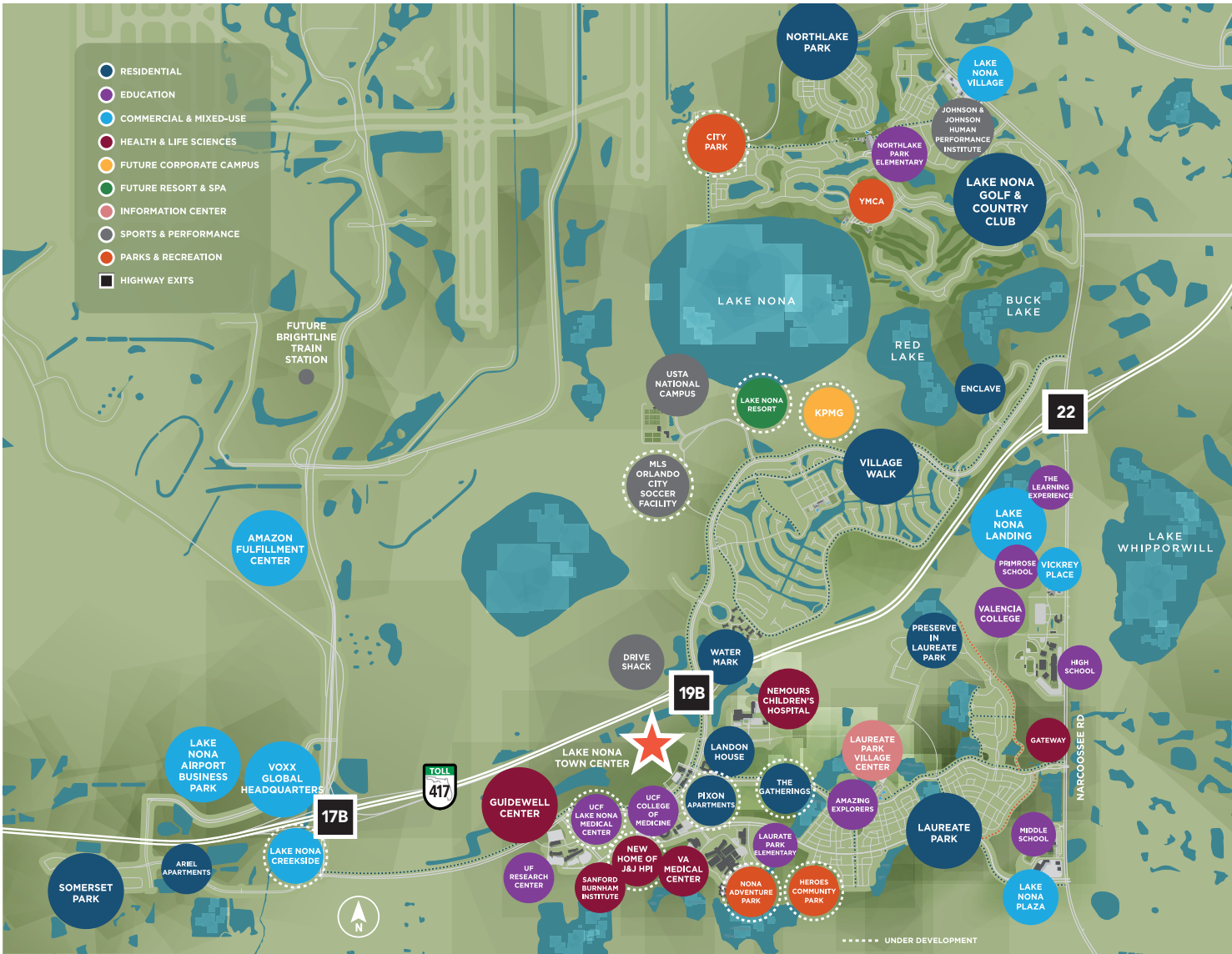
Future home of KPMG Learning, Development, and Innovation Facility, with a 55-acre campus

A-Rated Public Schools with more than 14,000 students

Billions of planned construction within the next three years

Cisco Iconic Smart + Connected City, first community in the U.S. to receive the designation

1st Gigabit Community in Florida



Lake Nona Annual Visitor Population

SPORTS & PERFORMANCE DISTRICT

USTA NATIONAL CAMPUS

225,000 annual visitors; 249 employees

USPTA

24 employees

USTA FLORIDA

24 employees

DRIVE SHACK

400,000 annual visitors; 400+ employees

MLS ORLANDO CITY SOCCER TRAINING FACILITY

100+ staff & players; a few thousand plus annual visitors

TOTAL SPORTS & PERFORMANCE: 625,797+

HOSPITALITY

COURTYARD MARRIOTT AND RESIDENCE INN

100,000 annual visitors; 64 employees

LAKE NONA TOWN CENTER HOTEL

118,000 annual hotel guests; 175 employees; 120,000 annual visitors

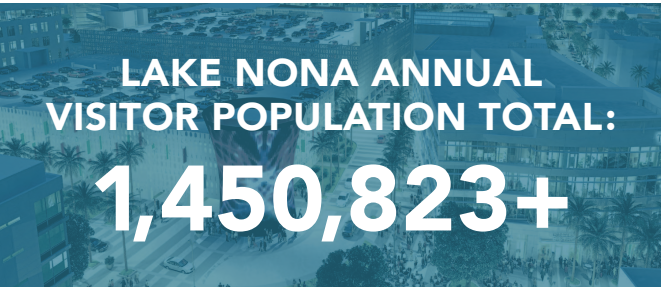
LAKE NONA RESORT

225,000 annual resort guests; 250 employees; 225,000 annual visitors

LAKE NONA CREEKSIDE HOTEL

60,000 annual guests; 75 employees

TOTAL HOSPITALITY: 748,564+ MORE TO COME



OFFICE

TOWN CENTER OFFICE I (85,000 SF)

164 employees

TOWN CENTER OFFICE II (155,000 SF)

250 employees

LAKE NONA GATEWAY (75,000 SF)

52 employees

VOXX GLOBAL HEADQUARTERS (115,000 SF)

150 employees

KPMG INNOVATION, DEVELOPMENT & LEARNING FACILITY

52,000+ visitors annually; 85 staff

AMAZON FULFILLMENT CENTER

2,500 employees

TOTAL OFFICE: 55,201+ MORE TO COME

LAKE NONA MEDICAL CITY

VA MEDICAL CENTER

2,500 employees; 4,000 daily visitors and patients

SANFORD BURNHAM PREBYS INSTITUTE OF MEDICAL DISCOVERY

200 daily employees

GUIDEWELL INNOVATION CENTER

70 daily employees; 6,200 annual visitors

NEMOURS

1,544 employees + patients and visitors

TOTAL MEDICAL CITY: 14,514+ MORE TO COME

HIGHER EDUCATION

VALENCIA

5,000 students; 129 faculty/staff

UCF COLLEGE OF MEDICINE & LIFE SCIENCES CAMPUS

740 students; 578 faculty/staff

UF RESEARCH & ACADEMIC CENTER

150 students; 150 faculty/staff

TOTAL HIGHER EDUCATION: 6,747

Diverse Neighborhoods

Lake Nona houses it all, from single family homes, town homes and luxury apartments to sprawling estates. Homes are thoughtfully built with modern design features to promote more efficient everyday living.

NEIGHBORHOODS FACTS

- Over 13,000+ current residents and 30,000 at build-out
- \$522,000 is the average home price in Lake Nona (2016)
- \$143,500 is the average HH income
- 84% of residents have college degrees, 51.5% of those have graduate school experience
- Identified as one of the wealthiest zip codes in Central Florida
- More than 500 families moving to Lake Nona every year



Lake Nona Golf & Country Club

Lake Nona Golf & Country Club is a sanctuary of luxury real estate and amenities located along the shores of Lake Nona.

CLUB HIGHLIGHTS

One of the top private golf and country clubs in the world for over 25 years

600-acre community featuring a Tom Fazio-designed championship golf course, 40,000 SF Clubhouse, 18-room Lodge, and Bath & Racquet Club

Homes range from \$1-7.5M

Expansion planned to include approximately 132 custom home sites, 20,000 SF amenities, and 144 luxury condo units (2020)

Home to countless professional golfers, world-class athletes and celebrities

Host of numerous professional and amateur tournaments, including the Inaugural Solheim Cup



Lake Nona Medical City: Health and Life Sciences Cluster

A health and life sciences campus with **more than 5,000 on-site** employees and millions of square feet of clinical, institutional and laboratory buildings.

SANFORD BURNHAM PREBYS MEDICAL DISCOVERY INSTITUTE

Ranked number one worldwide for the impact of its research publications (1999-2009) among all organizations in biology and biochemistry. World-class capabilities in stem cell research and drug discovery.

- **More than 200 employees**

UCF HEALTH SCIENCES CAMPUS

50-acre state-of-the-art complex dedicated to biomedical research, medical education and health sciences education. The campus includes the UCF College of Medicine and Burnett School of Biomedical Sciences.

- **578 faculty, staff and employees**
- **1.2 million SF facility**

UCF LAKE NONA MEDICAL CENTER

University of Central Florida HCA Healthcare partnership for \$175M 100-bed, medical, surgical and academic teaching hospital adjacent to the UCF College of Medicine.

UF RESEARCH & ACADEMIC CENTER

Nationally ranked Doctorate in Pharmacy (Pharm.D.) program, world-class research facilities and faculty and staff focused on innovative approaches to research and patient care, particularly in the areas of cancer, cardiovascular disease, diabetes and brain disorders.

- **150 employees**

VA MEDICAL CENTER

The VA system's most advanced hospital providing acute care, complex specialty care, advanced diagnostic services, a large multi specialty outpatient clinic, administrative and support services.

- **2,500 employees**
- **400,000 veterans served in this VA region**
- **1.2 million SF facility**
- **4,000 daily visitors and patients**

GUIDEWELL INNOVATION CENTER

Biotech companies, digital developers and modern business-minds collaborate here to develop groundbreaking ideas advancing health science.

- **92,000 SF facility**
- **1,270 employees**
- **6,200 annual visitors**



NEMOURS CHILDREN'S HOSPITAL

Nemours is one of the nation's largest pediatric health systems and employs thousands of the country's top pediatric specialists, researchers, educators and caregivers. Their philosophy embraces children across the age continuum, from infancy to adulthood, caring for them "The Nemours Way."

- **First free-standing children's hospital** in Orlando
- **137 beds**
- **630,000 SF facility**
- **400 doctors; 1,344 employees**
- **2,733 inpatient admissions** in 2016
- One of only nine children's hospitals nationwide that received **"Top Children's Hospital"** recognition in 2016 by Leapfrog Group, meeting the toughest standards for safety and quality
- **Innovation of the Year in Patient Care Award** in 2016 by Florida Hospital Association for the Nemours CareConnect program
- **First pediatric inpatient rehabilitation unit** in Central Florida helping children with conditions like traumatic brain injury

Lake Nona Office Space

Millions of Square Feet of commercial space currently reside within Lake Nona welcoming businesses, shops, restaurants, medical offices and more to serve on-site employees.

OPENING 2019



KPMG LEARNING, DEVELOPMENT, AND INNOVATION FACILITY

- 55-acre campus with 800,000 SF of space
- Campus will include 80 high-wage jobs with a reported average pay of \$66K
- Approximately 52,000+ professionals each year will travel to the campus
- More than \$400 million in capital investments
- 1,000 attendees can be accommodated in meeting and learning spaces
- 800 single-occupancy rooms

IN THE PIPELINE

Town Center Office I	85,000 SF
Town Center Office II (2018)	155,000 SF
Gateway Medical Office Building	75,000 SF
VOXX Global Headquarters	115,000 SF
Lake Nona Airport Office (2019)	166,000 SF
Town Center Office Cluster (2019)	370,000 SF
Amazon Fulfillment Center (2018)	850,000 SF



Town Center Office I; 85,000 SF



Town Center Office II (2018); 155,000 SF

Lake Nona Educational Facilities

Our community benefits from the Lake Nona Education Initiative, a strategy developed by the nonprofit Lake Nona Institute that ensures learning opportunities are available to residents from early childhood to PhD. We call it our Collaborative Learning Environment, and it is designed to give students the ability to engage in real-time interactions with researchers, doctors, professors and businesses within Lake Nona and around the world.

More than 14,000 students attend educational institutions on-site at Lake Nona ranging from Pre-K through Ph.D.

LAKE NONA EDUCATION: PREK - PHD AS OF JAN 2018

INSTITUTION	TYPE	CURRENT ENROLLMENT
Primrose School of Lake Nona	Early Childhood	237
The Learning Experience at Lake Nona	Early Childhood	235
Amazing Explorers Lake Nona	Early Childhood	200
NorthLake Park Community School	Elementary School	900
Laureate Park Elementary	Elementary School	837
Lake Nona Middle School	Middle School	2,103
Lake Nona High School	High School	2,744
Valencia College	Undergraduate	5,826
University of Central Florida College of Medicine	Graduate	610
University of Florida Research & Academic Center	Graduate	315
TOTAL		14,007



Lake Nona Sports & Performance District

USTA NATIONAL CAMPUS

- 225,000+ visitors annually
- Largest tennis campus in the world with 100 tennis courts
- 270,000 square foot, state-of-the-art facility on 64-acres
- Approximately 100 USTA tournaments and events annually with 30,000 participants.
- 40,000 hotel room nights per year generated by USTA participants and visitors
- Host of NCAA Division I Championships in 2019 and 2021

USTA MEMBER DEMOGRAPHICS AND DATA

- Gender – 38% Female; 62% Male
- Age – 60% are between the ages of 35-54
- Education – 98% have a college degree
- Average household income is \$284k per year and average net worth of \$2M
- USTA members stay 4-6 nights for their tournament travel
- Nearly 25% of members averaged 7-10 nights depending on length of tournament and number of matches played
- 37% travel with friends and 36% travel with their spouse/partner

USPTA

- 70 visitors for three days will attend annual Executive Committee meetings
- Over 1,000 visitors at the annual World Conference held in conjunction with the USTA
- Approximately 10 participants over two days will attend monthly certification testing
- Host four national championships annually in various locations including the Lake Nona campus with 40-50 unique players plus spouses and families
- Regional events and one-day workshops attracting 50+ attendees

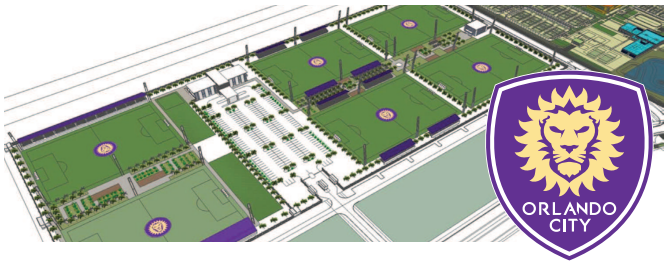


USTA National Campus



DRIVE SHACK

- 66,000 SF building and golf range with 90 golfing bays
- Approximately 400,000 visitors per year
- Restaurant, bar and event space on-site



MLS ORLANDO CITY SOCCER CLUB TRAINING FACILITY (2019)

- The center will house Major League Soccer team Orlando City, minor-league team Orlando City B and the club's U.S. Soccer Development Academy teams.
- State-of-the-art training facility
- Facility will include multiple practice pitches and a training facility with a state-of-the-art fitness center, player's clubhouse, locker rooms, film rooms, offices, and an injury prevention and rehabilitation center.

Hospitality

COURTYARD BY MARRIOTT AND RESIDENCE INN BY MARRIOTT

200 room, dual-branded hotel in Lake Nona Town Center

One of the first hotels in the country to feature an entire floor of Stay Well rooms, featuring the latest wellbeing technologies from Delos, the Cleveland Clinic and Dr. Deepak Chopra

IN THE PIPELINE

Upcoming hotels in pre-construction phase: Additional 250,000+ room nights per year

LAKE NONA RESORT - OPENING FALL 2020

Resort located on the south shore of Lake Nona between the USTA National Campus and the KPMG Training Campus, will be a premier luxury resort community

Collection of hotels, restaurants, spa, condominiums, villas, and estate homes will blend work, play, and lifestyle with the highest level of luxury and healthy living

Approximately 450 rooms

4 and 5-star resorts with world-class golf, tennis, spa, recreation, and dining

Set along the shores of a 15-acre man-made Crystal Lagoon

LAKE NONA TOWN CENTER HOTEL - OPENING WINTER 2020

Urban Boutique-style hotel with up to 7,500 SF of event space

210 rooms

LAKE NONA CREEKSIDE HOTEL - OPENING SUMMER 2019

120+ Room Hotel

Adjacent to the Orlando International Airport



Lake Nona Resort



Lake Nona Hotel



Courtyard by Marriott and Residence Inn by Marriott

Lake Nona Town Center

Lake Nona Town Center is a 100-acre site that fronts SR-417, Orlando’s eastern beltway, with access from three interchanges. There will be 4 million SF of mixed-use development at final build out.

DEMOGRAPHICS WITHIN 10-MILE RADIUS

Population (2022)	505,038
Population Forecast (2027)	565,564
Population Growth (2017-2022)	12.89%
Total Daytime Employment	216,643
Households (2022)	176,989
Households Forecast (2027)	198,134
Average Household Income (2022)	\$70,856

OVER 1.5 MILLION SF - INITIAL PHASES

Inline Retail	300,000
Big/Medium Box Retail	200,000
Restaurant	110,000
Cinema/Entertainment	120,000
Health & Fitness	120,000
Office	480,000
Hotel (420 Keys)	400,000











FOR LEASING INFORMATION CONTACT STEINER + ASSOCIATES AT (614) 414-7300 OR VISIT STEINER.COM



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