

# 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

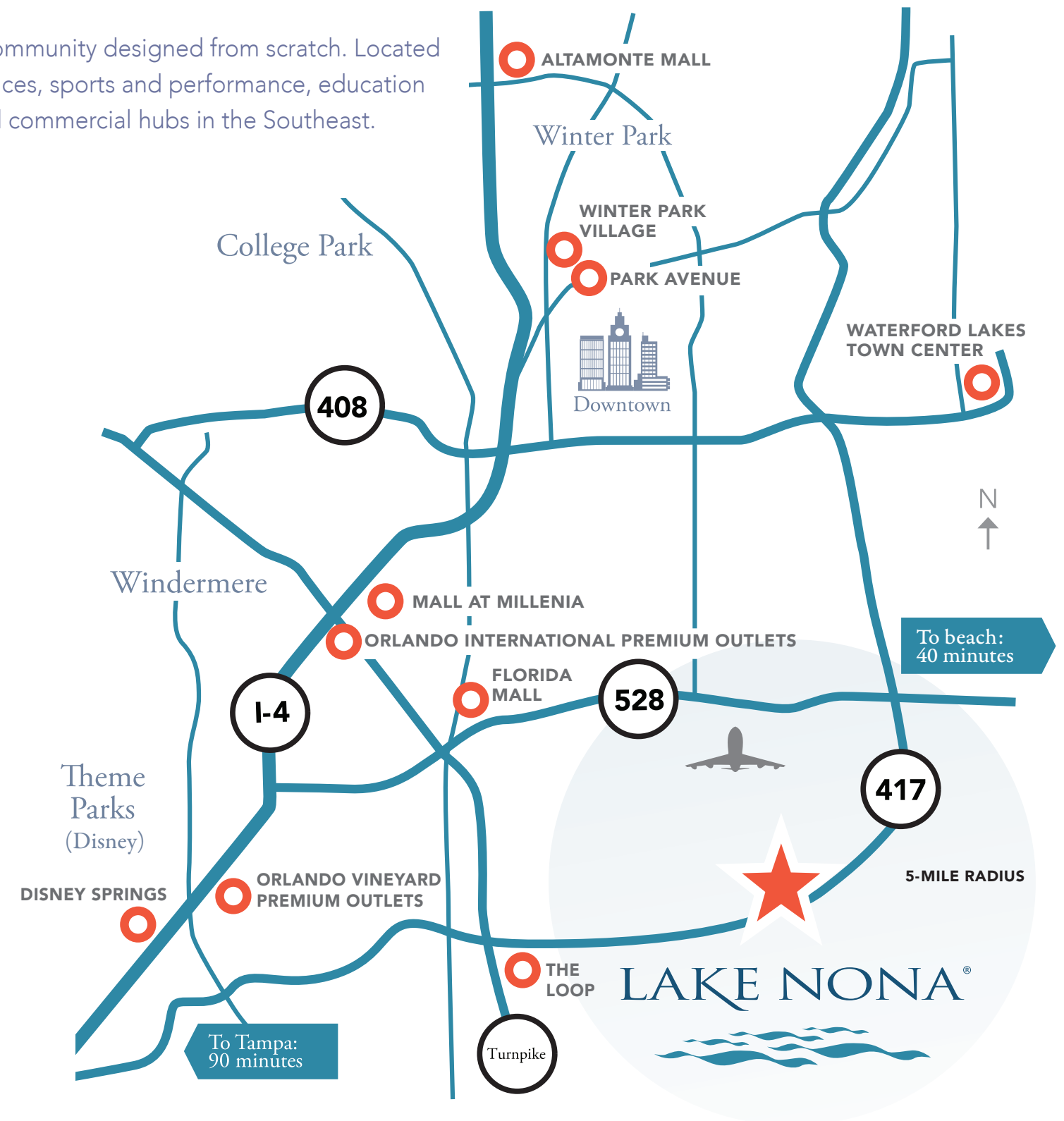
- 2.4 Million** people in the Metro Area
- 68 Million** visitors annually, most visited city in the world with an economic impact of more than \$50 billion
- Orlando Airport (MCO)** 42 Million visitors annually
- #1 Metro Area** for job growth (2016 U.S. Department of Labor, Bureau of Labor Statistics)
- 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	<b>10 mins</b>
Downtown Orlando	<b>20 mins</b>
Waterford Lakes Town Center	<b>20 mins</b>
Florida Mall	<b>20 mins</b>
The Loop	<b>20 mins</b>
Mall at Millenia	<b>25 mins</b>
Park Avenue (Winter Park)	<b>35 mins</b>
Area Theme Parks	<b>40 mins</b>
Disney Springs	<b>40 mins</b>
Atlantic Coast Beaches	<b>40 mins</b>



The Beacon and Code Wall at Lake Nona Town Center



# The Lake Nona Community

## 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

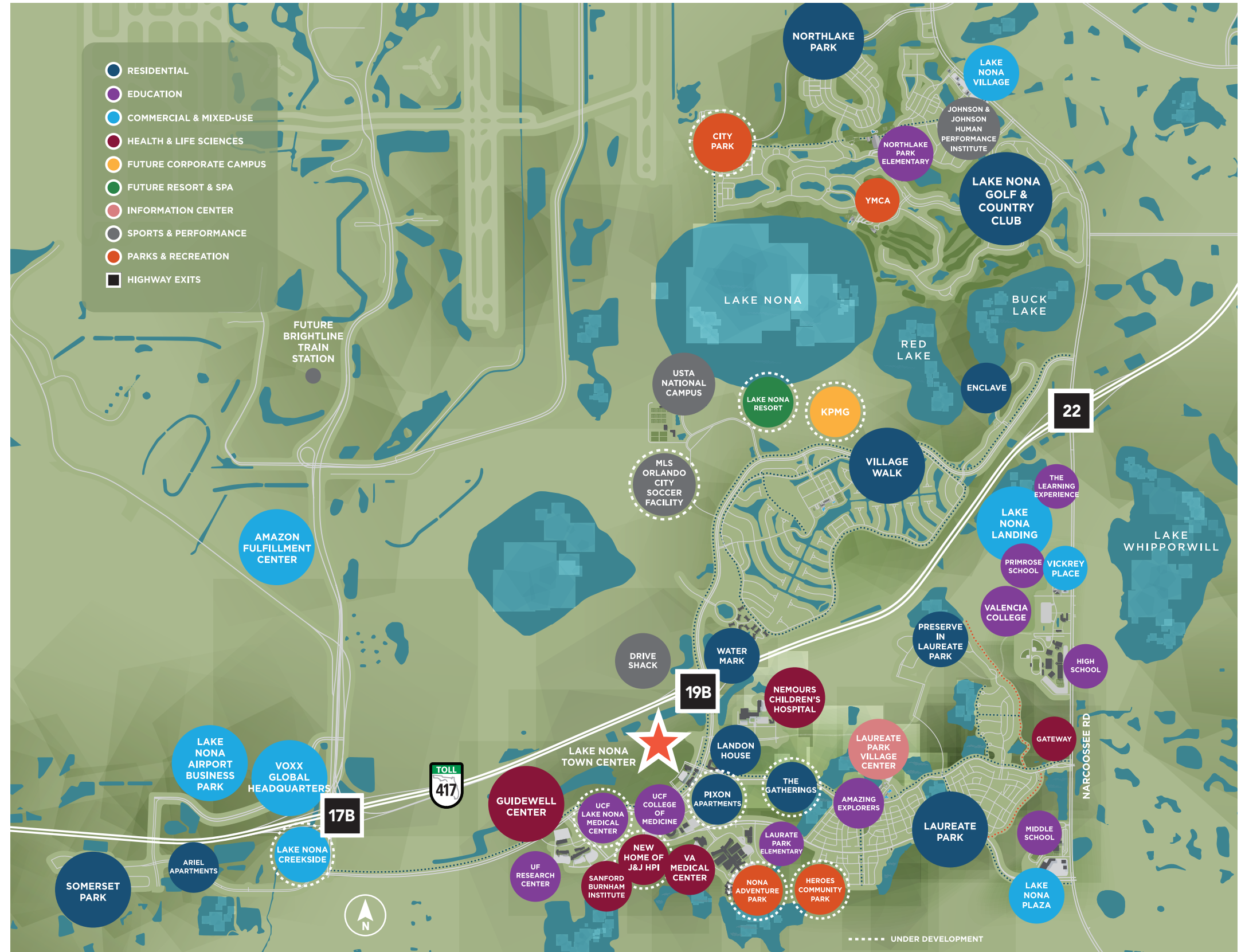
**Future home of KPMG Learning, Development, and Innovation Facility**, with a 55-acre campus

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

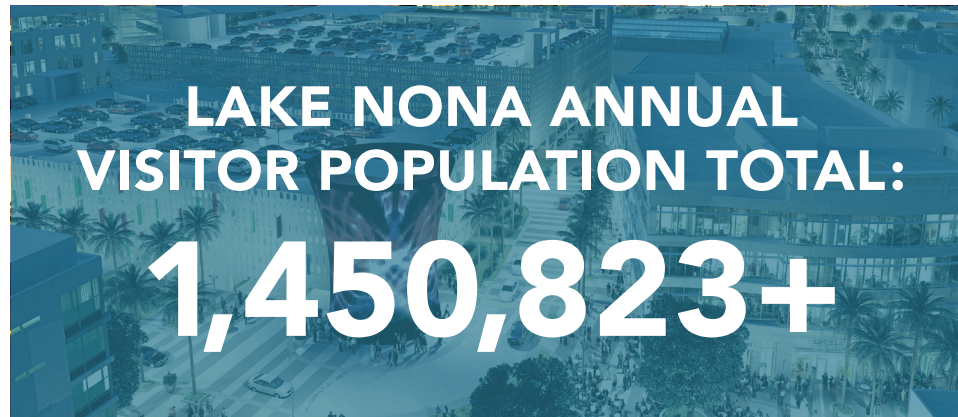
**Billions of planned construction** within the next three years

**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
<b>TOTAL</b>		<b>14,007</b>



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

## OVER 1.5 MILLION SF - INITIAL PHASES

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









FOR LEASING INFORMATION CONTACT STEINER+ ASSOCIATES AT (614) 414-7300 OR VISIT [STEINER.COM](http://STEINER.COM)



# TOWN CENTER

LAKE NONA®



**TAVISTOCK**  
DEVELOPMENT COMPANY