

# 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

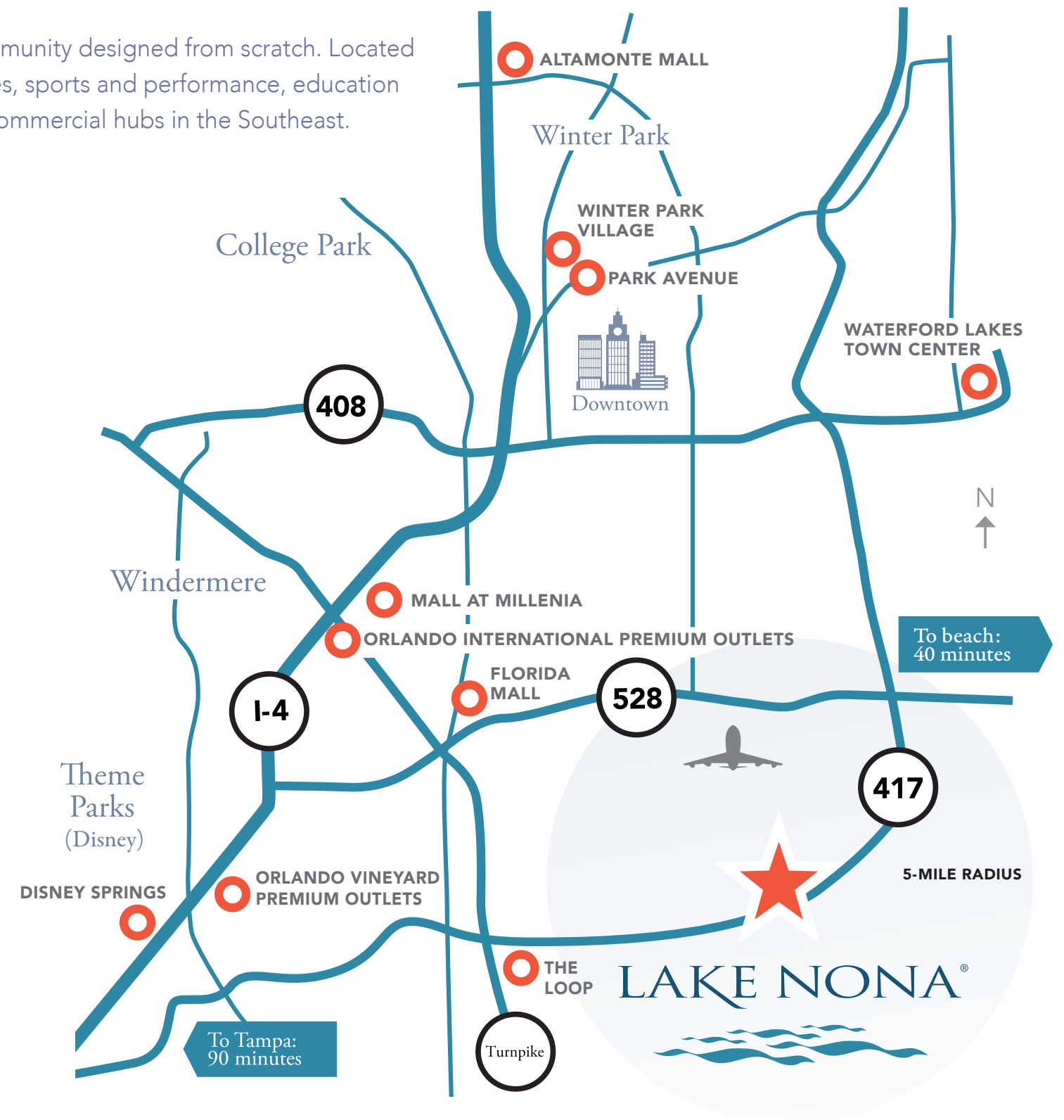
- 2.4 Million** people in the Metro Area
- 72 Million** visitors annually, most visited city in the world with an economic impact of more than \$50 billion
- Orlando Airport (MCO)** 44.6 Million visitors annually
- #1 Metro Area** for job growth (2016 U.S. Department of Labor, Bureau of Labor Statistics)
- 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.
- Largest University** in U.S. in terms of undergraduate enrollment (UCF) with a total student population of 66,183 in 2017
- 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

**15,000+ residents and 12,000+ 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)

**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

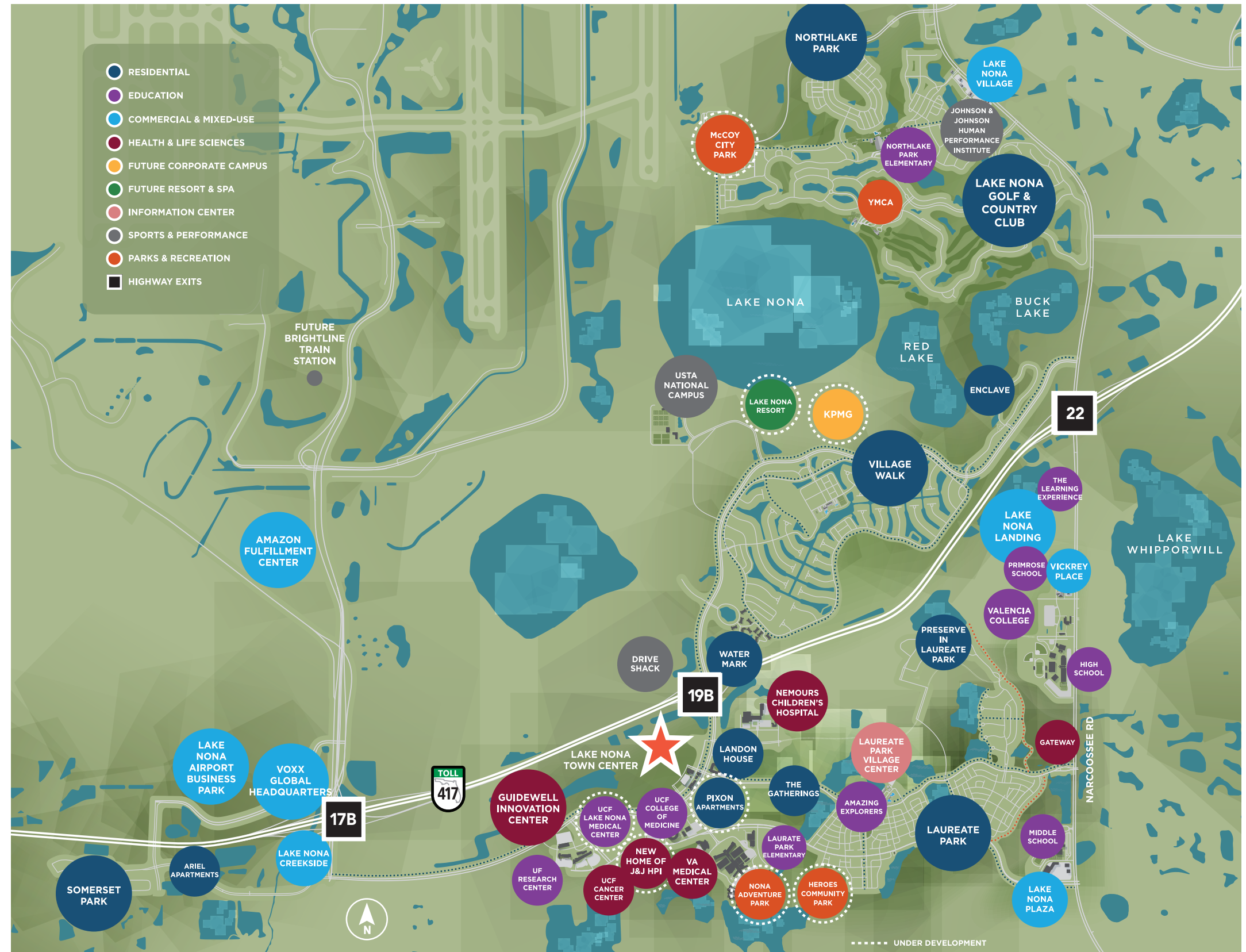
**Future home of KPMG Learning, Development, and Innovation Facility**, with a 55-acre campus

**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

**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

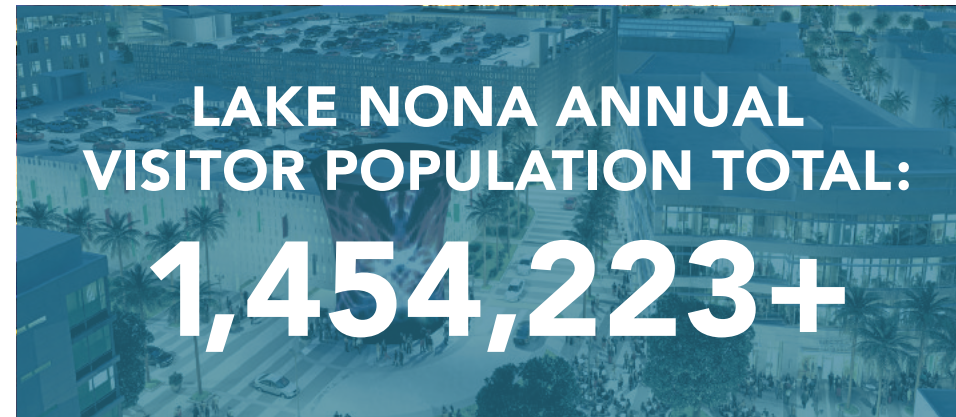
225,000 annual resort guests; 250 employees; 225,000 annual visitors

### LAKE NONA CREEKSIDE HOTEL

60,000 annual guests; 75 employees

**TOTAL HOSPITALITY: 748,564+ MORE TO COME**

# LAKE NONA<sup>®</sup>



## 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

6,000 employees

**TOTAL OFFICE: 58,701+ MORE TO COME**

## LAKE NONA MEDICAL CITY

### ORLANDO VA MEDICAL CENTER

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

### UCF LAKE NONA CANCER CENTER

Projected 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 15,000+ current residents and 30,000 at build-out

\$522,000 is the average home price in Lake Nona (2016)

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 custom home sites, luxury condos and 20,000 SF of amenities (2020)

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

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



# 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.

## UCF LAKE NONA CANCER CENTER

The new UCF Lake Nona Cancer Center will house cancer researchers, clinical trials and treatments for patients. It will be next door to the new adult teaching hospital and UCFCOM

- **Projected 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 (2021)

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

## OFFICE PRODUCT

Town Center Office I	<b>85,000 SF</b>
Town Center Office II (2018)	<b>155,000 SF</b>
Gateway Medical Office Building	<b>75,000 SF</b>
VOXX Global Headquarters	<b>115,000 SF</b>
Lake Nona Airport Office (2019)	<b>166,000 SF</b>
Town Center Office Cluster (2019)	<b>370,000 SF</b>
Amazon Fulfillment Center	<b>850,000 SF</b>
LNTC Office Building B (2020)	<b>108,000 SF</b>
LNTC Office Building G (2020)	<b>96,000 SF</b>



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



## 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



USTA National Campus

# Hospitality

## COURTYARD BY MARRIOTT AND RESIDENCE INN BY MARRIOTT

**204 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 334 rooms and 20,000 SF of event space**

**5-star resort** with world-class 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 9,200 SF of event space

**215 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>462,561</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>275,000</b>
Big/Medium Box Retail	<b>200,000</b>
Restaurant	<b>110,000</b>
Cinema/Entertainment	<b>100,000</b>
Health & Fitness	<b>130,000</b>
Office	<b>630,000</b>
Hotel (435 Keys)	<b>400,000</b>









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



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