



WATERSTAR

ORLANDO



New Retail, Entertainment and Recreation-Inspired Destination
ANTICIPATED OPENING: Q2 2021

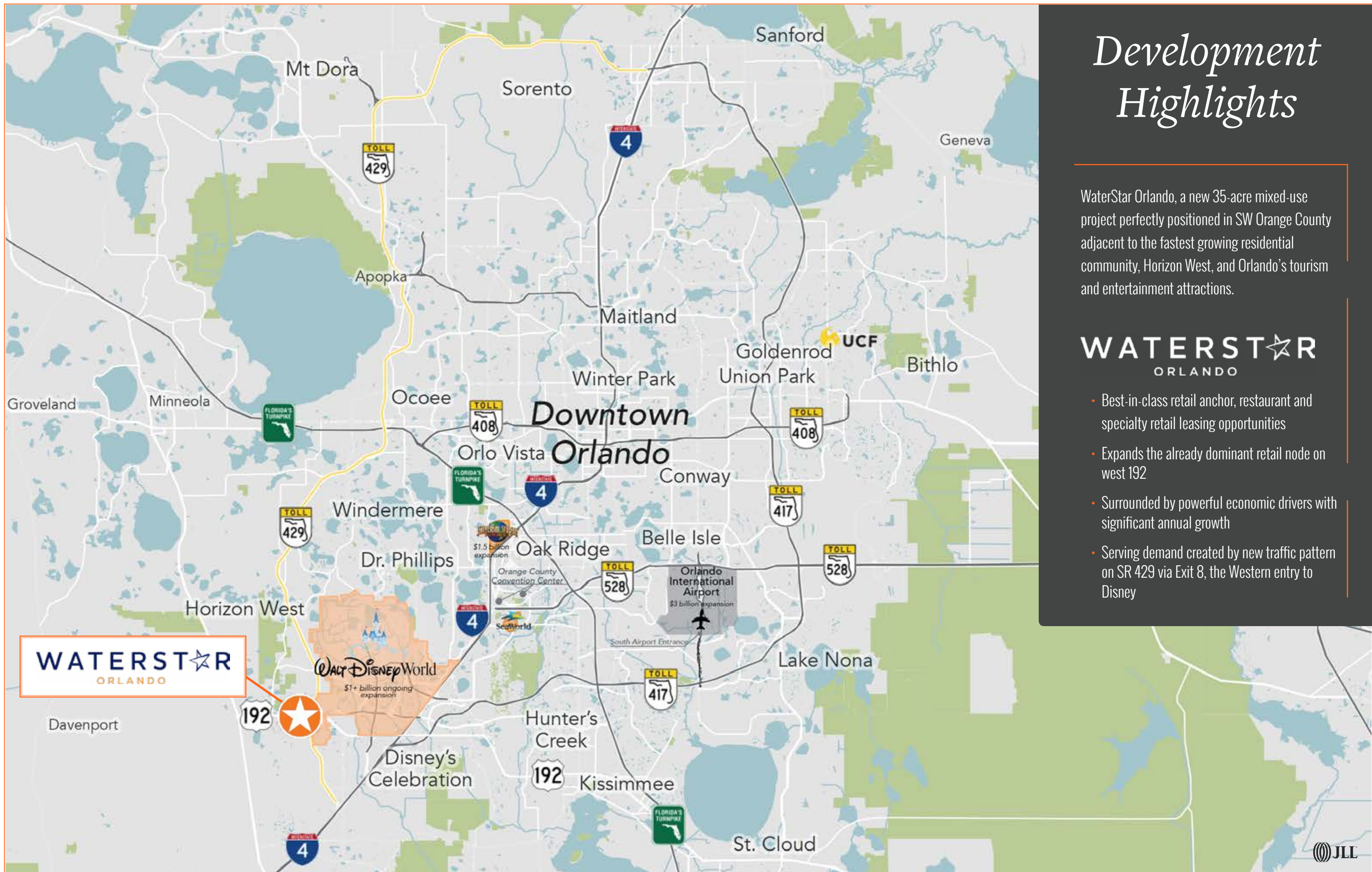


Development Highlights

WaterStar Orlando, a new 35-acre mixed-use project perfectly positioned in SW Orange County adjacent to the fastest growing residential community, Horizon West, and Orlando's tourism and entertainment attractions.

WATERSTAR ORLANDO

- Best-in-class retail anchor, restaurant and specialty retail leasing opportunities
- Expands the already dominant retail node on west 192
- Surrounded by powerful economic drivers with significant annual growth
- Serving demand created by new traffic pattern on SR 429 via Exit 8, the Western entry to Disney





Dominant Retail Trade Area and Proven Performance

- Tourist spending 4.5x permanent resident spending
- Retail and restaurant sales 2x-3x national averages
- Average big box and grocery sales \$700 - 800/s.f.
- Average apparel retail sales \$700 - 1,000/s.f.
- Average restaurant sales \$700 - 1,000/s.f.



Project Highlights

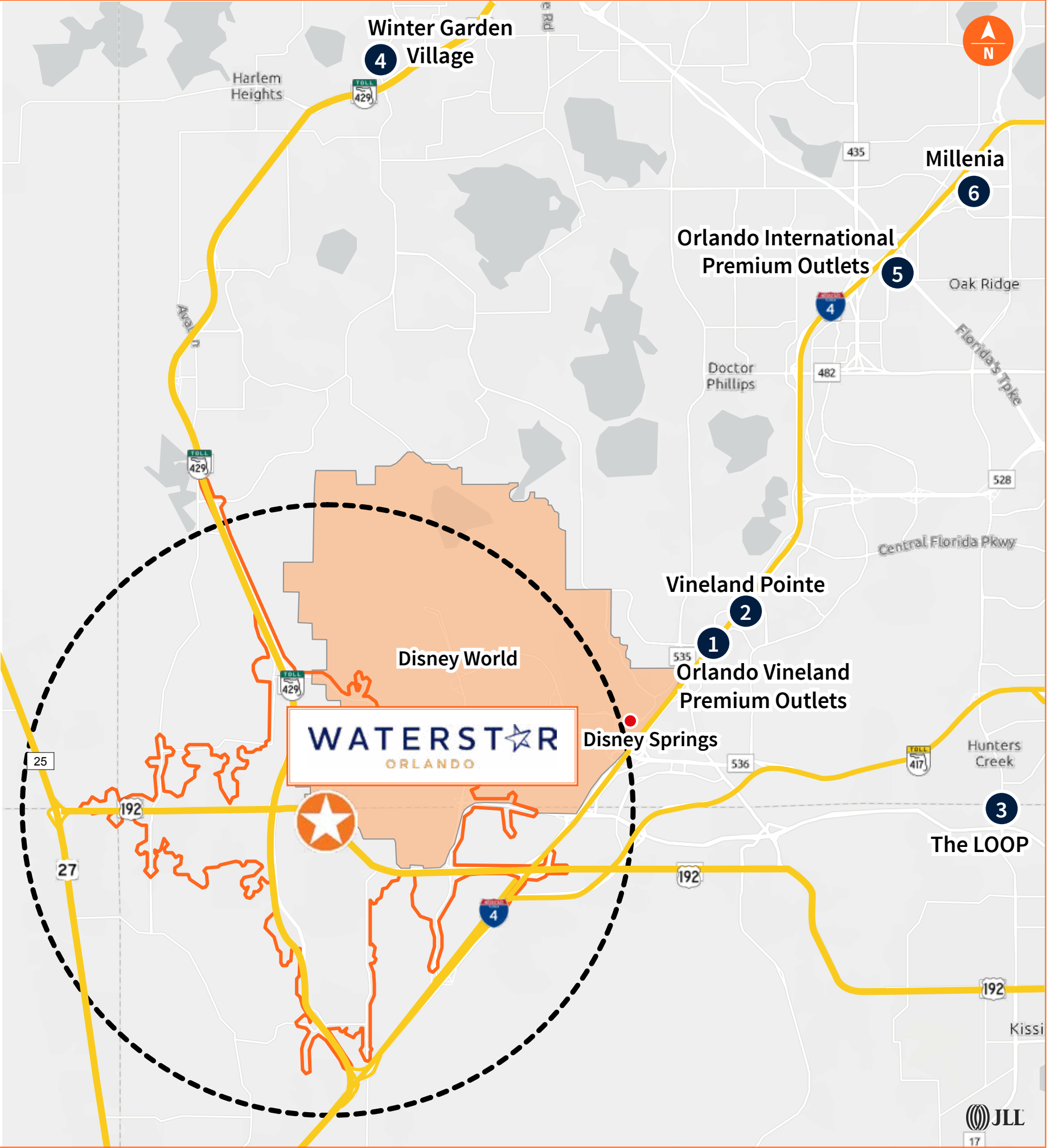
- 35-acre mixed-use project
- At the center of one of the strongest performing retail nodes in Central Florida
- 2,300 feet of frontage on Irlo Bronson Memorial Highway (60,000 AADT)
- Best-in-class retail anchors, restaurants, specialty retail, and community space for event programming
- Across from Sunset Walk, the Entertainment Center and Orlando's newest 12-acre water park at the \$750 million Margaritaville Resort
- Adjacent to SR-429 Beltway: the western entrance to Walt Disney World
- 320 residential units on site

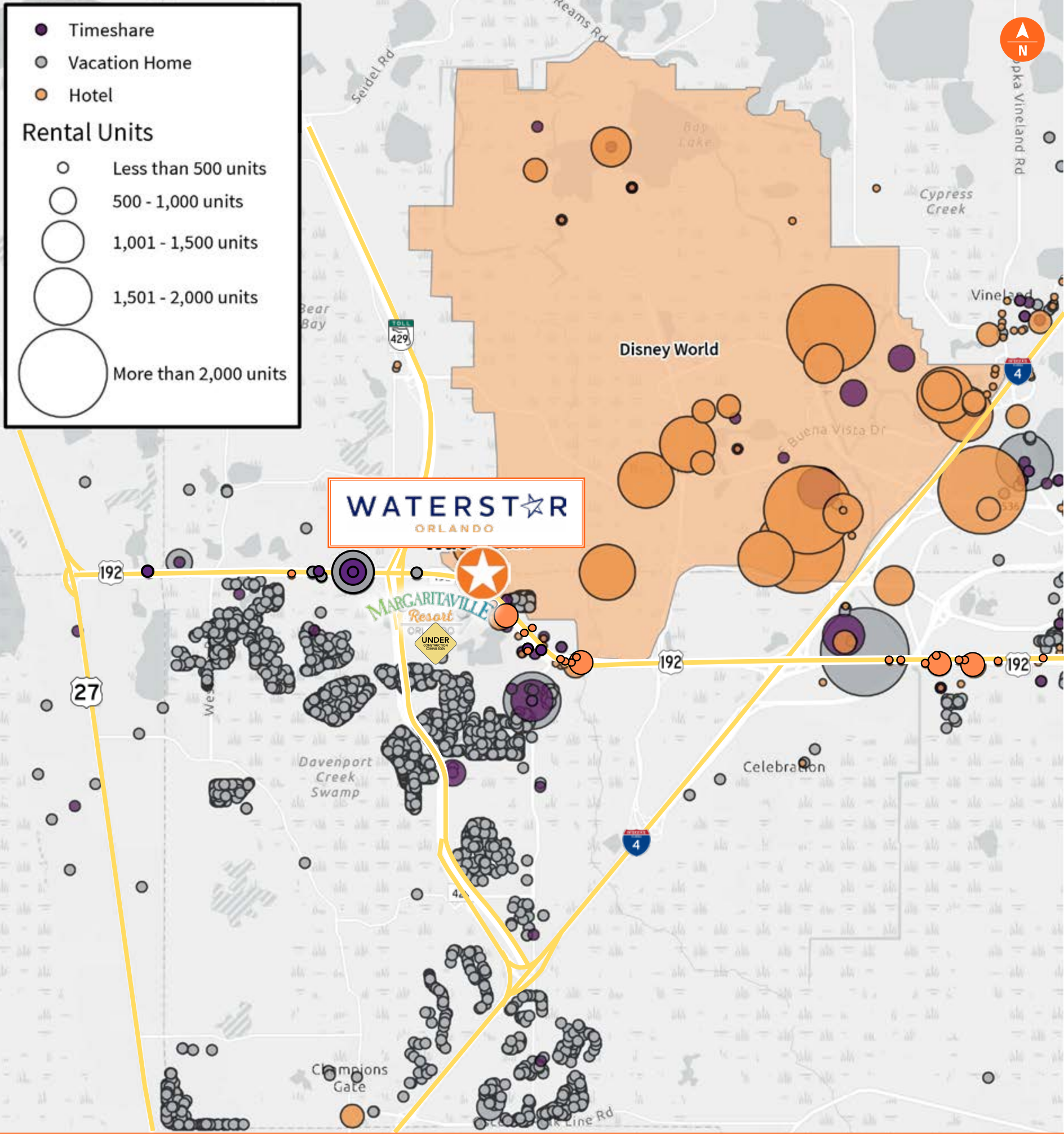


Filling The Void West of I- 4

- 11 miles from nearest power center node
- Serving the demand driven by both tourism and residential growth

TOP PERFORMING POWER CENTERS		MILES	TYPICAL DRIVE (MINS)
1	Orlando Vineland Premium Outlets	11	16-40
2	Vineland Pointe	12.7	18-35
3	The LOOP	13.4	18-45
4	Winter Garden Village	18.5	22-25
5	Orlando International Premium Outlets	17.2	26-50
6	Millenia	21.5	30-50





Unparalleled Demographics

+156,223 consumers

\$5.5 million in daily tourism spend

\$96,592 weighted average income

Demographics	5 MILES	7 MIN DRIVE TIME
WEIGHTED AVERAGE INCOME	\$96,592	\$96,027
DAILY TOURIST SPEND**	\$5,495,567	\$1,496,407
TOTAL HOUSEHOLDS UNITS	76,440	32,799
Permanent Resident Households	14,283	3,617
Vacation Units	62,157	29,182
TOTAL CONSUMER POPULATION	156,223	66,072
Permanent Residents	36,883	10,043
Average Daily Visitors*	119,340	56,029

* Calculated as the number of hospitality units (hotel rooms & suites, vacation homes & condominiums, and timeshares) x 80% (2018 YTD Avg Occupancy) x 2.4 guests per unit

** Calculated as \$149 per person per day, 21.80% of total spend on restaurant outings

Source: Florida DBPR, ESRI, Visit Orlando, JLL Research

Economic Drivers Igniting Massive Growth



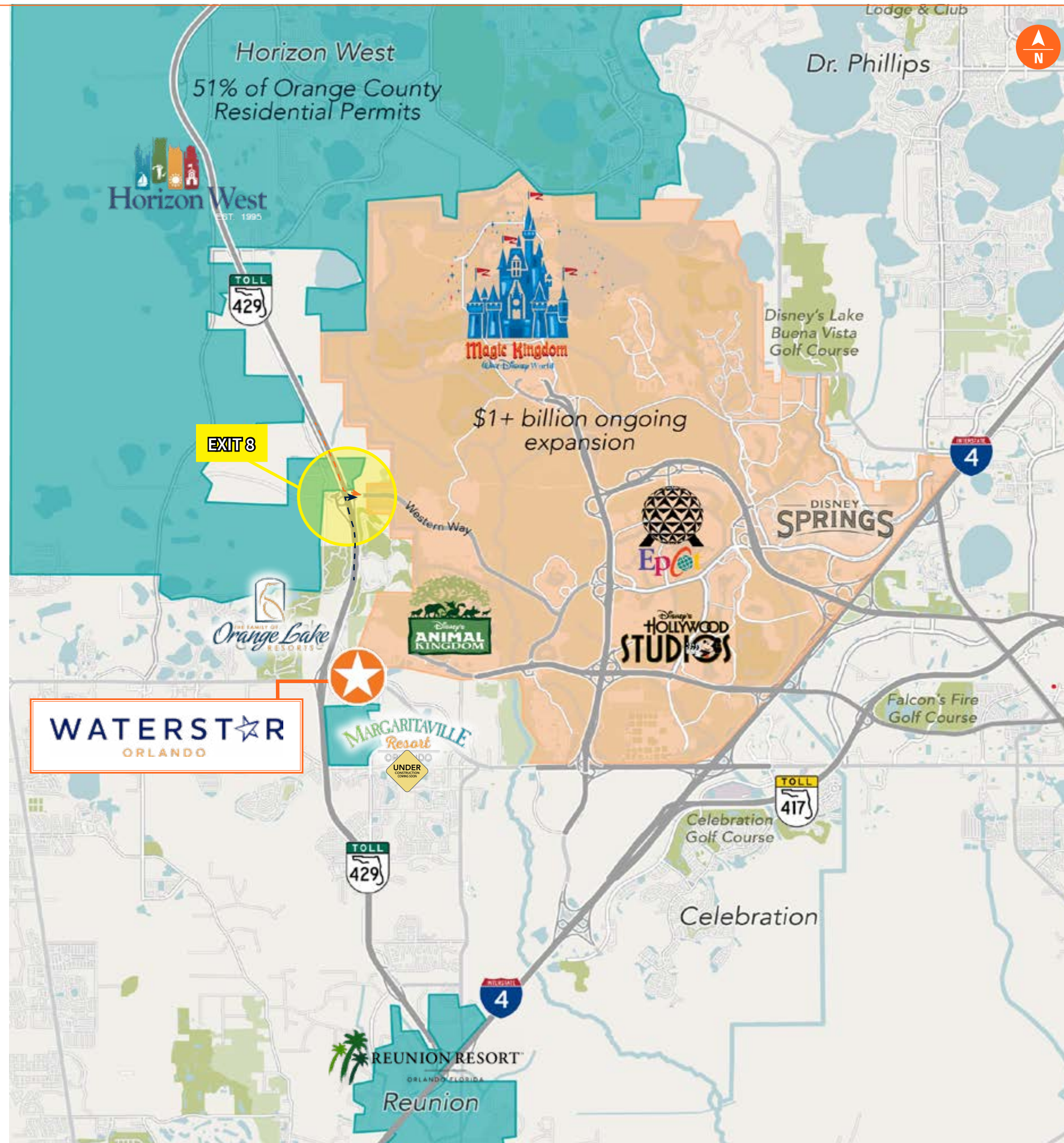
The **3rd fastest growing master-planned community in the nation**, with more than 51% of all residential permits for Orange County. A 20,700-acre master planned community with 6 residential villages totaling 40,000 new homes.



Attendance up +15% at Animal Kingdom- now the 6th most visited park in the World. Largest opening in history of Disney expected in 2019 with Star Wars Galaxy Edge. **53+ million visitors and 74,000 employees.**



1,200 vacation homes, 187 key hotel, ranging from 2-8 bedrooms, priced between \$350,000-\$1,000,000. Featuring Island H2O Live, a newly opened 12-acre water park with 20 attractions open year-round.



12,000-13,000 visitors per day occupying over 4,500 timeshare units. Each unit welcomes new visitors every week, generating new consumers who are ready to shop.



A 2,200-acre destination resort with nearly **6,800 planned units** of one- to three-bedroom villas, three- to thirteen-bedroom private vacation homes, three-story rental condos and a 1,500-key luxury hotel with plans to expand. 3 PGA golf courses, a 6-acre water park, 6 exceptional dining venues, a full-service spa and fitness/tennis center, 140,000sf of office space and almost 500,000 s.f. of retail.



Exit 8 - Western Way

Averaging ~122,000 vehicles per day, SR-429 is a major thruway from I-4 to Disney, Orange Lake Golf Courses and the Four Corners region. Exit 8 adds 2.6 miles of road directly from SR-429 to **Disney's new main gate**, drawing traffic to the WaterStar area.



Metrics Driving This Market Are Unique

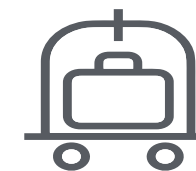
75 MILLION

visitors to Orlando in 2018



53 MILLION

visitors to Walt Disney World in 2018



31,805

hotel rooms and suites within 5 miles



16,326

vacation homes and condos

14,026

timeshares all within a 5 mile radius

28,612

employees 5 mile

10,512

employees 7 minute drive

Area Employers:

- Walt Disney
- Retailers and Restaurants
- Orange Lake Resorts
- Margaritaville Resort



\$5.5 MILLION

daily retail and restaurant spending within 5 miles



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For more information on how to make WaterStar a home for your brand, contact our project team:

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