Top 50 Master-Planned Communities of 2018

What Makes the 50 Top-Selling Masterplans So Successful?

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### Top 50 Master-Planned Communities of 2018

<table>
<thead>
<tr>
<th>Rank</th>
<th>Project Name</th>
<th>Developer</th>
<th>Location</th>
<th>2018 Net Sales</th>
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¹Estimate  Bold=Multiple MPCs on list

**Updated January 12, 2019**

**Source:** John Burns Real Estate Consulting, LLC (January 2019)
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*Bold=Multiple MPCs on list

**source**: John Burns Real Estate Consulting, LLC (January 2019)
What Makes the 50 Top-Selling Masterplans So Successful?

By Jody Kahn, Senior Vice President, and Devyn Bachman, Senior Research Analyst

Combining for over 28,000 new home sales in 2018, the developers and builders behind these 50 top-selling masterplans have figured out the secret sauce to success. For a rare few, success is simply the right product in the right location at the right time. However, most developers have worked hard to create the perfect combination of attractive amenities, proper product segmentation, and creative, targeted marketing. Our JBREC consultants share their thoughts on the attributes that contribute to success for the top 50 masterplans in the sections below.

Regional Highlights

We present the highlights in the order of our January 2019 regional ranking, from strongest to weakest. We rank the 10 regions monthly for our research clients, based on new home sales and pricing strength, job growth, and other fundamentals. To learn more about our research services contact Caroline Parker at cparker@realestateconsulting.com.

Southwest

Denver, CO
Principal consultant Ken Perlman observes, “Stapleton really embraces what is great about Denver—outdoor living and a healthy lifestyle. Stapleton's parks and trail system is as great as I’ve seen anywhere in the country. And when I look at great product around the country, I invariably come back to Stapleton. There are so many great examples of higher-density product in Stapleton that just live great, such as multi-level townhomes with roof decks, paired homes, and of course, really cool single-family homes (even a great mid-century modern product I love). Stapleton is proving that you can create great lifestyle with product at price points for everyone.”

Colorado Springs, CO
Devyn Bachman, Senior Research Analyst states, “Colorado Springs is a growing market with solid job growth and an expanding population. Banning Lewis Ranch offers a variety of homes styles and price points with family-friendly amenities and ample parks and open space—all things Coloradoans love.”

Las Vegas, NV
Ken Perlman, Principal Consultant, states “Summerlin really represents the high watermark for new homes in Las Vegas. It’s got everything that a buyer would want in a masterplan, from great starter homes for families to move-down product with access to great amenities and community gathering spaces. Downtown Summerlin has evolved into an epicenter for food, retail, and entertainment. There are so many great homes here, but I particularly love what Toll Brothers accomplished with its Regency at Summerlin active adult community: great open floor plans, lots of social gathering spaces, and a right-sized amenity that feels great but isn’t overwhelming.”
Las Vegas, NV (continued)

Ken adds, “Inspirada proves that amenities that families want in a great location are a recipe for success. Four really cool parks and community events like farmers’ markets and yoga classes that promote health and wellness, which is what today’s buyer is looking for. I love the community’s emphasis on education as well (Princeton Academy). Inspirada provides a mix of product opportunities for first-time and move-up buyers. Pardee created some particularly cool product there with Strada, which offers great indoor-outdoor living with a contemporary take on modern farmhouse style.”

“It’s been fun to watch Cadence evolve into a true community,” notes Ken. “I love the emphasis on community interaction from lots of parks and trails (including the 50-acre central park) to a great bike share program. I think Landwell has done one of the best jobs at creating digital connectivity throughout the masterplan with broadband access for residents and Wi-Fi throughout common areas. Cadence really offers housing product for all lifestyles, from first-time buyers to move-up families. Some of the newest active adult product in Las Vegas is located in Lennar’s Heritage at Cadence enclave. It’s all helping to create a true multigenerational and interactive masterplan.”

Finally, Ken highlights, “Olympia has created a great combination of attainably priced housing with cool amenities at Skye Canyon. The Skye Center community clubhouse there is one of my favorites anywhere. Simple, but with lots of gathering spaces for the residents and great access to the pool and fitness center. The community ethos promotes what masterplan residents want today: health, wellness, and balance. Skye Canyon is part of the next iteration of Las Vegas masterplans, and we’re looking forward to seeing what they come up with next.”

WE EXPECT A MASTER-PLANNED COMMUNITY TO HAVE:

• A range of home sizes, types, and prices and a variety of builders (with rare exceptions for especially large and well-segmented communities)

• Consistent themes, such as signage, landscaping, lighting, street names, mailboxes, etc.

• Shared or reciprocal amenities and activities for a variety of lifestyles

• Branding and marketing that give the community a unique and well-recognized identity

SALES TOTALS MAY ADJUST SLIGHTLY.

Our developer contacts rush to provide us with annual sales only days following year-end. Final accounting over the next couple of months may produce minor adjustments up or down.
Phoenix, AZ

Ken Perlman notes, “At Eastmark, DMB/Brookfield really focused on bringing the residents together. In the first few years the community was open, each homeowner received an orange bike cruiser to promote a healthy, active, and social lifestyle. And they’ve maintained them. Great amenities like the Bus Stop and Orange Monster are there for kids; community concerts and festivals appeal to all generations. The homes are great, too, but the key tenants of community—interaction, well-being, and choice—are what Eastmark really offers.”

“With Estrella, Newland has proven that developers can create a great sense of place. Homes for all buyers from entry-level to move-down (including the age qualified Canta Mia section) integrate amazing amenities (including more than 70 acres of lakes in the desert and 40 acres of paths and trails), modern home design (with unique indoor-outdoor spaces) and great schools. Newland is an expert at integrating all of the great factors buyers want in a masterplan: healthy lifestyles, community interactions, top amenities, and great homes.”

Ken adds that “Verrado was built embracing the “small town” concept with homes for first-time buyers, move-ups, and move-down buyers alike. DMB was one of the first developers to include the concept of build-for-rent homes in its masterplan as well. One of my favorite amenities anywhere is the Giving Tree at Verrado, which symbolizes the concept of community gathering and philanthropy. I love the newest active adult section of Verrado, Victory. The design is about socialization (the first thing buyers see when they arrive is the “Big Patio”) and, for today’s new active adult buyer, proximity to kids, friends, and clubs.”

“Vistancia’s long-term success has been a combination of great amenities, homes for everyone, and a strong regional location. I love The Village for families and luxury product at Blackstone. Shea is introducing some great new product in its newest section of Trilogy at Vistancia as well. Health and welfare are key tenants of the Vistancia lifestyle. I love the Discovery Trail throughout the community, with stops for outdoor fitness or just to enjoy the view. The developers don’t over complicate. They just do a lot of things very well.”

Finally, “Newcomer to our top 50 ranking, The Meadows takes advantage of an ideal Phoenix location in Peoria, near the Lake Pleasant outdoor recreation area, Westgate City Center, and the 101/303 loop roads with excellent access to local employment. Builders like Toll Brothers, Maracay Homes, Taylor Morrison, and others are offering creative floor plans that make great use of indoor-outdoor space. Those homes, combined with the strong regional location, good Peoria schools, and built amenities that include pools, hiking trails, biking trails, and parks, are among the reasons for the masterplan’s success.”

Salt Lake City, UT

Ken Perlman summarizes: “Daybreak is not just one of the best masterplans in Salt Lake City—but anywhere. The themes Daybreak promotes really resonate with today’s buyer. The developer promotes social interaction including food truck roundups and community festivals. Daybreak really embraces healthy living with hundreds of community gardens throughout the masterplan, plus lakes, walking and biking trails, and a University of Utah health care clinic on site. Daybreak is one of the best communities at integrating the modern farmhouse theme into its homes, which really reinforces the health and wellness themes.”
**North Florida**

**Jacksonville, FL**
Principal consultant Lesley Deutch states, “Nocatee had a busy year with the opening of seven new neighborhoods, which is testament to the successful segmentation strategy at the MPC. Lifestyle and schools are the driving forces behind the strong performance, and the developer continues to expand the amenity program to keep the MPC fresh.”

Devyn Bachman, Senior Research Analyst, comments, “Mattamy Homes, KB Home, Lennar, and Richmond American Homes build homes in the Bartram Park masterplan. The MPC offers easy access into downtown Jacksonville and other employment centers, appealing to commuters looking for affordably priced homes.”

**Tampa, FL**
Lesley notes, “Starkey Ranch has created a unique destination in north Tampa that attracts buyers from all stages of life. The natural setting adjacent to a wilderness preserve is unique, and the outdoor living has been successfully integrated throughout the community. The masterplan also includes a district park, which enhances the sense of community and serves as an additional amenity for residents.”

**Orlando, FL**
Lesley describes Lake Nona as a “diverse and well-planned community. Innovation, health and technology have been successfully branded throughout all areas, and Lake Nona is known for its wide-ranging medical industries. The masterplan is truly unique; the first shipping container park opened in December and serves as an incubator for dining and rental concepts.”

**Lakeland, FL**
Devyn adds, “Highland Meadows offers attainably priced homes in Lakeland, a growing market that has rapidly expanded as Orlando homes prices have risen. Families are attracted to the beautiful pool, playground, and walking paths.”

**Brevard, FL**
Lesley notes that “Viera is one of the few masterplans where the developer is also the largest builder. We credit Viera’s success with a wide and changing product offering as well as massive investment in the private space industry and defense spending, which is drawing high-income earners to the region.”

**The Villages, FL**
Lesley adds, “Nothing seems to stop The Villages from continued expansion and growth, and the Villages continue to introduce new neighborhoods every year. The immense variety of activities and community events combined with homes available at all price points makes The Villages attractive to retirees from across the country.”
**South Florida**

**Daytona Beach, FL**
Jody Kahn, Senior Vice President of Research, says, “**Latitude Margaritaville** delivers a touch of paradise to 55+ buyers seeking a fun, outdoor lifestyle, complete with fitness facilities, a walkable town center with Jimmy Buffet themed restaurants, beach-themed pools, a bandshell for live music events, and a private beach accessed via continuous shuttle. It’s five o’clock somewhere, right?”

**Sarasota, FL**
Principal consultant Lesley Deutch notes, “**Lakewood Ranch** continues to attract buyers from all life stages, and the opening of Waterside in the southern part of the masterplan in mid-2017 has added new product and future amenities to Lakewood Ranch. Buyers in Lakewood Ranch enjoy a strong school system, expanding retail options, a thriving main street, employment opportunities, and an abundance of outdoor recreation options.”

She adds, “2018 was another strong year for **The West Villages**, and sales grew by 12% year over year. Retirees and some families are attracted to the laid back, southern Florida lifestyle, and builders are attracted to the high traffic the masterplan generates. The planned Atlanta Braves spring training facility and a new Publix-anchored shopping center provide future entertainment and retail options buyers can enjoy.”

**Texas**

**Austin, TX**
David Jarvis, Senior Vice President of Consulting, states, “**Siena** is a family-focused master-planned community in Round Rock, TX, that continues to pursue value-oriented entry-level new homes.”

**Dallas, TX**
David adds that **Viridian** continues to be one of the best-selling masterplans with its focus on high-quality lifestyle amenities and a low maintenance environment. Viridian will continue its tradition of excellence in 2019 with the opening of Elements, a new 55+ active adult community with several distinct product lines being offered by three of the top builders in DFW.”

“**Harvest** focuses on farming and gardening, providing homeowners with opportunities to grow their own produce, pitch in to harvest community crops, share surplus food with the North Texas Food Bank, or deepen their agricultural knowledge through on-site gardening classes. All of this without giving up any of the spectacular master-planned community features you would expect.”

**Houston, TX**
David says, “**Towne Lake** features a 300-acre recreational lake. The community promotes an outdoor lifestyle with an extensive park and trail system and Texas Hill Country charm. Other amenities include a boardwalk, marina, and amphitheater.”

“**Harmony** is well situated with quick access to the Grand Parkway, neighborhood schools, and neighborhood shopping and dining. The introduction of six new builders and the availability of new home product priced under $300,000 greatly contributed to the YOY increase in sales.”
Houston, TX (continued)

“The Woodlands” is closing in on the final stages of its residential offerings yet remains in the top 50. The strong performance is a function of continuing to focus on product segmentation and unique architectural product offerings that align with the market demand, with prices ranging from the mid-200s to $2M+.”

David adds, “The latest success in Bridgeland is fueled by the focus on sustainability and regional amenities like the 140-acre Josey Lake that invites residents to connect with nature and explore the outdoors on miles of trails, kayaking and canoeing, fishing, and bird watching. In addition, the forward-thinking product segmentation offering affordability without sacrificing quality has been instrumental in increased absorptions.”

“Balmoral” opened Texas’s first Crystal Lagoon this year to great excitement. We called out Balmoral for the largest growth in sales YOY at 345%. Land Tejas is planning to deliver nearly 600 new lots in 2019.”

David notes that “Sienna Plantation” recently celebrated its 20th anniversary and is now home to over 8,000 families. Five world-class amenity centers, seven public schools, nine churches, lifestyle programing, and 1.9 million square feet of retail and commercial space make the community a great place to live. Sawmill Lake Club, the community’s newest recreational complex, features an 8,000 square foot club with professional fitness center, ballroom, meeting spaces, outdoor patio with community grills, and lakeside fire pit.”

David continues, “Cross Creek Ranch has 40 miles of trails and over 650 acres of lakes, parks, and environmental open space. It has a wide variety of housing choices with prices ranging from the $200s to many millions, including townhomes, detached alley-accessed housing, and products targeted to millennials, families, empty nesters, and active adults. Cross Creek has been recognized by multiple organizations for its commitment to sustainable, low-impact development practices.”

“Woodforest” thrives on its ability to provide multi-generational living with over 20 unique product lines sustaining price points ranging from $180,000 to over $1 million. The most gratifying aspect of Woodforest is not only experiencing the diverse offerings of amenities and conveniences amidst the natural environment. It’s discovering that it is a part of a greater community with established values, which is the true measurement of a successful master-planned community.”

He adds, “Aliana” is an award-winning community featuring new homes priced from the $280s to more than $1 million, with homes for first-time buyers, low-maintenance luxury homes, and custom homes. If you enjoy the outdoors, you may never want to leave Aliana. Tennis, swimming, fitness, even great places for a weekend bar-b-que or a formal reception are available at the community center.”

“Wildwood at Northpointe” residents enjoy amenities that include a pool and clubhouse and park area inside the neighborhood. There is also a scenic trail system winding throughout the community as well as lakes, a playground, and beautifully landscaped common areas.”

Finally, “Riverstone” is one of Fort Bend County’s most desirable addresses and has continually been recognized as a top-selling community in the nation. In just 15 years, Riverstone is now home to over 6,000 families, and its continued success is a result of a pristine landscape defined by luxurious homes, incredible water features, and resort-style amenities in the highly coveted Sugar Land area.”
San Antonio, TX
David says that “Alamo Ranch is well located in west San Antonio near Lackland Air Force Base. Alamo Ranch is one of San Antonio’s largest masterplans, with extensive product and price segmentation. Several builders have sold out their sections, and the others are winding down.”

Northern California

Sacramento, CA
Dean Wehrli, Senior Vice President of Consulting, states, “Westshore in Natomas offers some of the most affordable new homes in greater Sacramento, and the masterplan is one of the most attractive in the region. The masterplan is a quick drive from downtown Sacramento jobs.”

He adds, “Whitney Ranch has grown into a true premier address in greater Sacramento, providing the schools and views that give families the best of both worlds.”

Stockton
Dean says, “With attention to detail and the key amenities that make great masterplans—parks, schools, beautiful streetscapes—River Islands has become one of the best communities in the region. Surging interest from Bay Area households seeking affordability has increasingly fueled River Islands’ success.”

Dean notes about Mountain House: “Being nestled near the affluent Bay Area attracts families escaping high prices. Having great schools and a huge variety of homes sealed the deal for home buyers this year.”

Northwest

Tacoma, WA
Northwest consultant Annie Radecki explains that “Tehaleh has experienced a volume upsurge due to the combination of its maturity and its affordability relative to the Seattle MSA, drawing buyers south to Tacoma.”

Southeast

Charleston, NC
Vice President Kristine Smale notes, “Cane Bay continues to be the best-selling new home community in Charleston, primarily due to its excellent product segmentation which offers homes for buyers in all life stages at a wide variety of price points. The masterplan continues to add amenities to stay fresh. An on-site YMCA will open in early 2019 that will include a branch of the county library system.”

Northeast

Washington, DC
Local consultant Kate Guthrie says, “Willowsford continues to attract home buyers to the Washington, DC, suburbs through strong price and product segmentation paired with unmatched amenities. A working farm, community CSA
(community share agreement), demonstration kitchen, 40 miles of trails, parks, tree houses, dog parks, a sledding hill, pools, and even a newly constructed splash park give residents every lifestyle amenity imaginable while creating a true sense of community that brings neighbors and families together. Homeowners take such pride of owning within the community that they gladly display stickers on their cars with the community logo.”

Kate adds, “Brambleton appeals to most home buyers, offering stylish urban style townhomes with outdoor living space options, single-family detached homes, and active adult condos, villas, and elevator townhomes. Brambleton proves that surban is both attainable and desirable and boasts a high walkability score. They host fun events that include runs/walks, summer concert series, and a weekly farmers’ market. In December 2018, the masterplan celebrated the opening of the Brambleton Library—a 40K-square-foot facility featuring a teen center, LEGO play area, and makerspace with 3D printers, robots, and recording studio.”

9 Midwest

The Midwest region has no masterplan ranked in the top 50.

10 Southern California

Orange County, CA
Principals consultant Ken Perlman states, “Rancho Mission Viejo has evolved to be one of the truly great lifestyle communities, not only in Southern California, but in the US. It offers tons of housing options for young couples looking to purchase their first home and families looking for amenities. RMV has become the go-to option for active adult buyers in Southern California. The Hilltop club is one of the best gathering and recreational spaces I’ve seen anywhere.”

Vice President Adam Artunian notes, “With most neighborhoods selling at price points over $1M, the Irvine Ranch attracts move-up and luxury buyers looking for great schools, amenities, and safety. However, this buyer segment has slowed recently.”

Adam adds, “Great Park Neighborhoods has shifted to offering more high-density product that targets entry buyers at price points under $1M. As a result, sales have outperformed the overall Orange County new home market.”

Riverside-San Bernardino, CA
Principal consultant Pete Reeb says, “The villages of Ontario Ranch provide stylish, attainably priced housing in desirable planned community settings with abundant family-friendly amenities in a close-in location. There are now four active villages, including Park Place, Grand Park, New Haven, and Avenida.”

San Diego, CA
Pete observes, “Otay Ranch truly has something for everyone. Three villages with distinctly different vibes offer home buyers an array of lifestyles to choose from, ranging from the family-friendly Village of Escaya, with its emphasis on single-family detached homes, to the higher-density townhomes and surban ambiance of Millenia.”
Looking for More Community Insights?

Attention to every detail related to home design, community layout, and amenity selection make these masterplans successful. We will talk about these trends and more at our upcoming Housing Design Summit.

More Information

John Burns Real Estate Consulting congratulates the developers and home builders that achieved our top 50 ranking. Please contact Jody Kahn at jkahn@realestateconsulting.com or Devyn Bachman at dbachman@realestateconsulting.com for information on any of the top masterplans.

WE CONNECTED WITH DEVELOPER, BUILDER, AND CAPITAL SOURCE CONTACTS TO CONSIDER 410 MASTER-PLANNED COMMUNITIES NATIONWIDE.

We invest significant time and effort to identify all top-selling masterplans; however, some developers and investors choose not to participate.

VIEW PRIOR TOP 50 RANKINGS ON OUR WEBSITE

You can view our historical rankings since 2010 by visiting the following link:

www.realestateconsulting.com/stay-informed/top-selling-master-planned-communities/
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About Us

John Burns Real Estate Consulting, LLC, helps executives make informed housing industry decisions. Our passionate team of analysts and consultants from around the country helps our clients identify the best risk-adjusted investment opportunities. We are known for our:

- **Client focus.** Our clients have personal access to our team of market and industry experts. We also connect clients to opportunities for new business. We always seek to innovate and improve our practices to make our clients’ lives easier.

- **Speed.** We are focused exclusively on housing and strive to have the most current data at our fingertips. We are diligent, regularly out in the field, and tapped into industry leaders—which results in great research and advice.

- **Proprietary tools.** We have created many tools to provide unique and timely insight. They include a monthly survey of builder executives, several indices and forecasts, and a demand model by price range and household composition.

- **Data quality.** We create, collect, and buy the best industry data available, and our analysts then advise clients how to apply that insight to their business planning.

- **Local knowledge.** Our team has offices in many major housing markets across the country.

- **Management expertise.** Our team leaders are seasoned industry veterans who have learned from multiple housing cycles.

- **Trusted integrity.** We are independent advisors. We do not recommend stock investments or take contingency fees so that it is clear we have no conflicting agendas.

Quick Stats

Regularly quoted in:

- **WSJ The Washington Post**
- **CNBC Businessweek**

Weekly Newsletter 30,000+ subscribers

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John Burns Real Estate Consulting, LLC, takes great pride in our highly educated, resourceful, and experienced team that includes practitioners with 25+ years of experience in both home building and community development. As a research client, you gain access to our team across the nation to discuss market conditions, our current research, and our forecasts.

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