ROBINSON
PARK

DOWNTOWN OKLAHOMA CITY

July 2026

SECTIONS

ROBINSON PARK
RESEARCH & ANALYTICS

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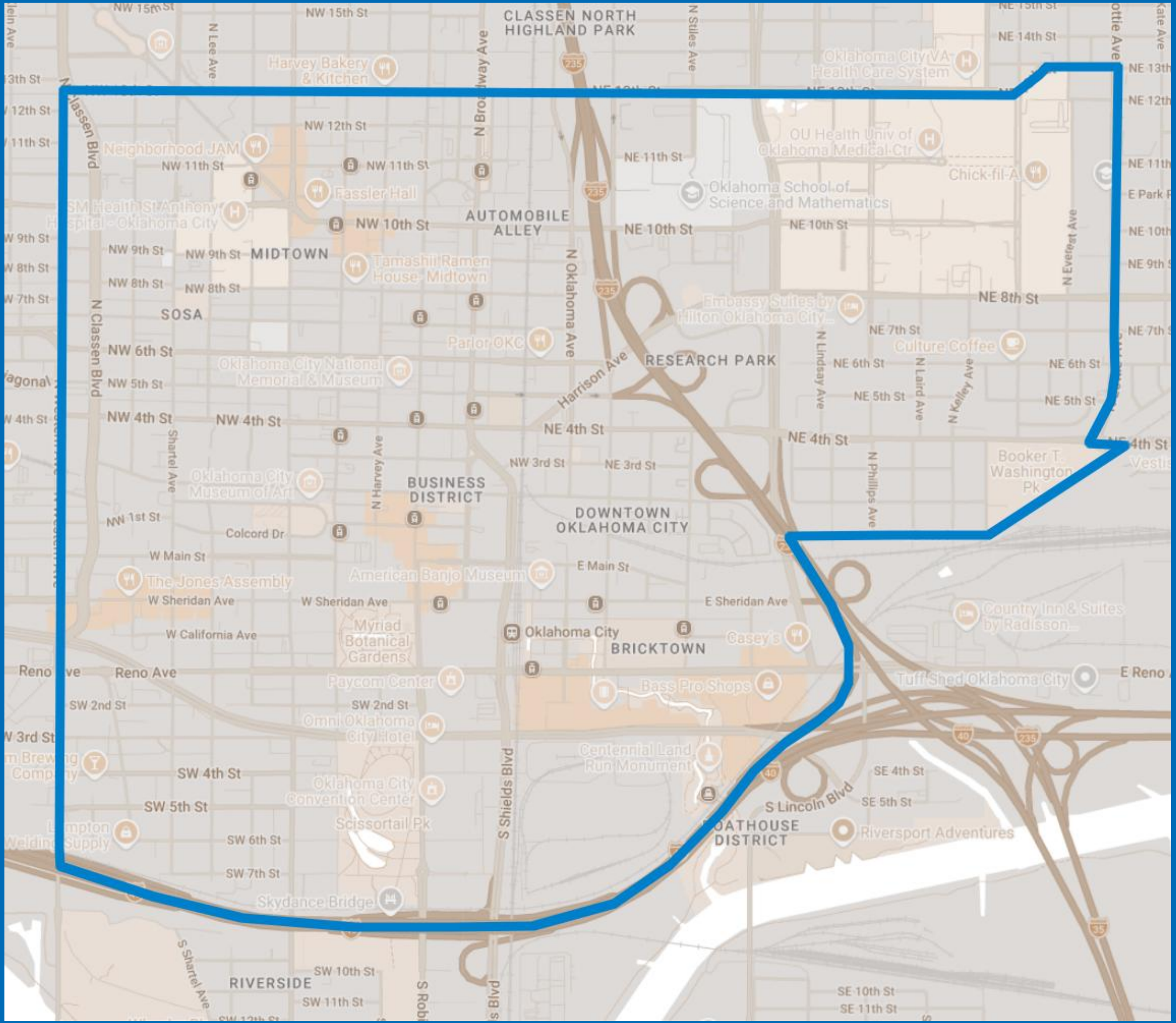

EXECUTIVE SUMMARY

Downtown Oklahoma City offers a compelling value proposition for those seeking a dynamic, well-connected, and amenity-rich environment

Accessibility & Location

Downtown offers ample parking, walkable streets, and easy access to major interstates. Tenants are located just steps from state, local, and federal offices, as well as county and federal courthouses, making it an ideal location for legal, governmental, and professional services.

Retail, Dining & Quality of Life

A vibrant retail and restaurant scene offers employees and clients a wide range of dining, shopping, and entertainment options. This supports employee satisfaction and retention while contributing to a high quality of life Downtown.

Residential Growth & Live-Work-Play

With thousands of residents already living Downtown and hundreds more expected over the next 2-3 years, the area is becoming a true live-work-play environment, anchored by the NBA's OKC Thunder and a steady lineup of major concerts and performances at venues ranging from large arenas to mid-sized concert halls.

High-Quality Office Inventory

Downtown's robust inventory of modern, flexible office space is suited for today's workforce needs. It offers businesses premium environments with layouts designed for collaboration, productivity, and growth.

Transformative Public/Private Investments

MAPS projects, the upcoming $1 billion NBA's OKC Thunder arena, and the $2.5 billion mixed-use soccer district are reshaping the urban landscape. Together, they signal long-term confidence in Downtown's future.

Strategic Business Decision

Downtown OKC is not just a location. It is a strategic move into a thriving, future-focused urban core offering connectivity, culture, and community for businesses and their employees.

Downtown Oklahoma City is not only a smart business decision—it is a strategic move into a thriving, future-focused district. **Transformative investments including MAPS 4, the upcoming $1 billion OKC Thunder arena, and the $2.5 billion mixed-use soccer district** are reshaping the urban landscape and signaling long-term confidence in the district's future.

As of: January 2026
Source(s): Esri

DOWNTOWN DEMOGRAPHICS

TOTAL HOUSING UNITS
6,616

RESIDENTS
11,602

DAYTIME POPULATION
85,677
Workers & Visitors

MEDIAN HOUSEHOLD INCOME
$68,726
U.S. Median Household Income is $81,624

2025-2030 ESTIMATED ANNUAL POPULATION GROWTH RATE
2.93%
U.S. Annual Projected Population Growth Rate is 0.42%

HOUSING OCCUPANCY 86.2%

Renter Occupied 92.1%

Owner Occupied 7.9%

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OFFICE

Source(s): Greater OKC Chamber, Esri

DOWNTOWN BUSINESS EMPLOYMENT SUMMARY

Home to 3,437 businesses and more than 72,000 employees across healthcare, government, energy, and professional services

3,437
Businesses Downtown

~72,000
Employees Downtown

#1
Largest Employer: OU Health / OU Medical (9,360 employees)

Healthcare Anchors

OU Health Sciences Center & OU Medical lead with **8,400 combined employees**, followed by **SSM Health Care of Oklahoma** with **5,000.** As a result, healthcare is the single largest employment sector Downtown.

Government & Public Sector

The City of Oklahoma City employs **4,500** people Downtown, reflecting a strong public sector presence. Proximity to state, local, and federal offices, as well as county and federal courthouses, makes Downtown the natural center of governmental operations for the Greater Oklahoma City region.

Energy & Professional Services

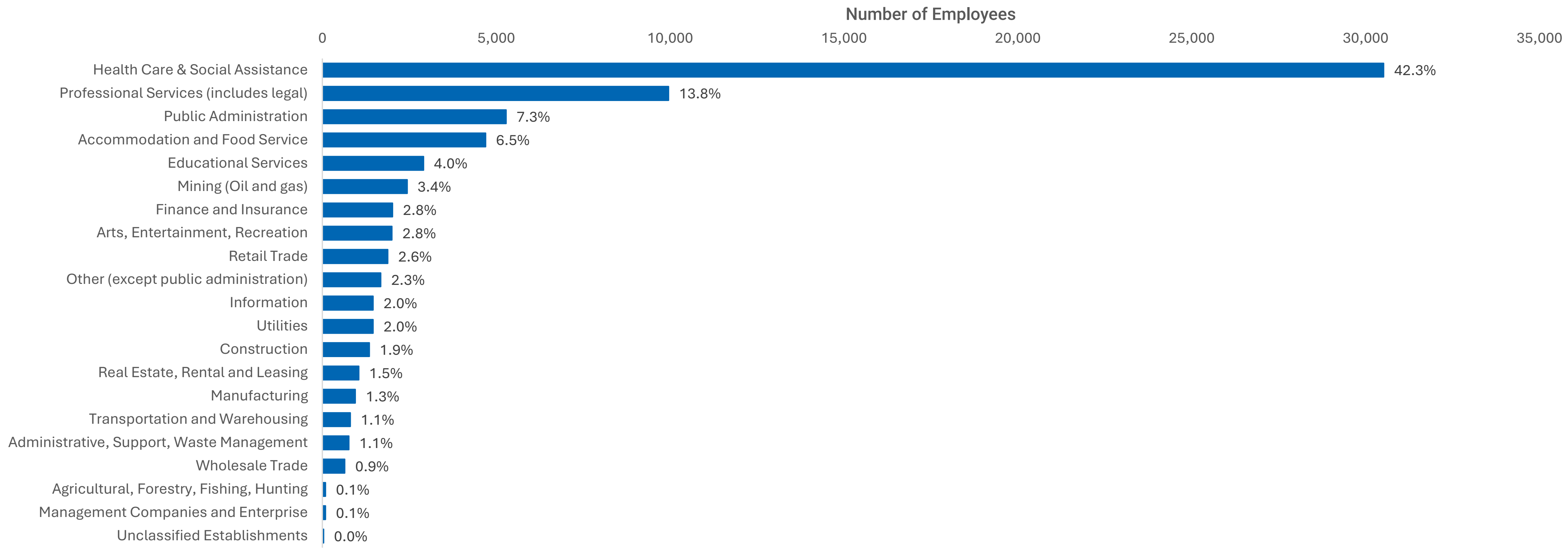
Devon Energy (**1,600**) and **Continental Resources** (**1,000**) anchor the energy sector. Combined with finance, legal, and professional services firms, Downtown supports a resilient, diversified employment base.

This concentration of employment, combined with ongoing investment in infrastructure, housing, and amenities, positions Downtown Oklahoma City as a dynamic and resilient center for commerce, healthcare, government, and energy.

As of: March 2026
Source(s): Esri

DOWNTOWN WORKFORCE

Major employers Downtown are in healthcare, legal, education, and government



Downtown OKC's 72,096-person workforce spans 21 sectors. Health Care & Social Assistance alone accounts for 42.3% of all employment, over three times the next largest sector. **The top 5 sectors collectively represent about 74% of the Downtown workforce**, reflecting a resilient and diversified economic base.

NOTABLE EMPLOYERS

McAfee & Taft

Oklahoma Natural Gas
A Division of ONE Gas

AM
Ackerman McQueen

Wells Fargo

OG+E

Continental Resources

BancFirst

Wheeler Bio

Heartland
Payment Systems

Boeing

The University of Oklahoma
Health Sciences Center

devon

LiNGO

Arvest Bank
Member FDIC

OMRF
Oklahoma Medical Research Foundation

Robinson Park

EY

Griffin Media

J.P.Morgan

SSM Health

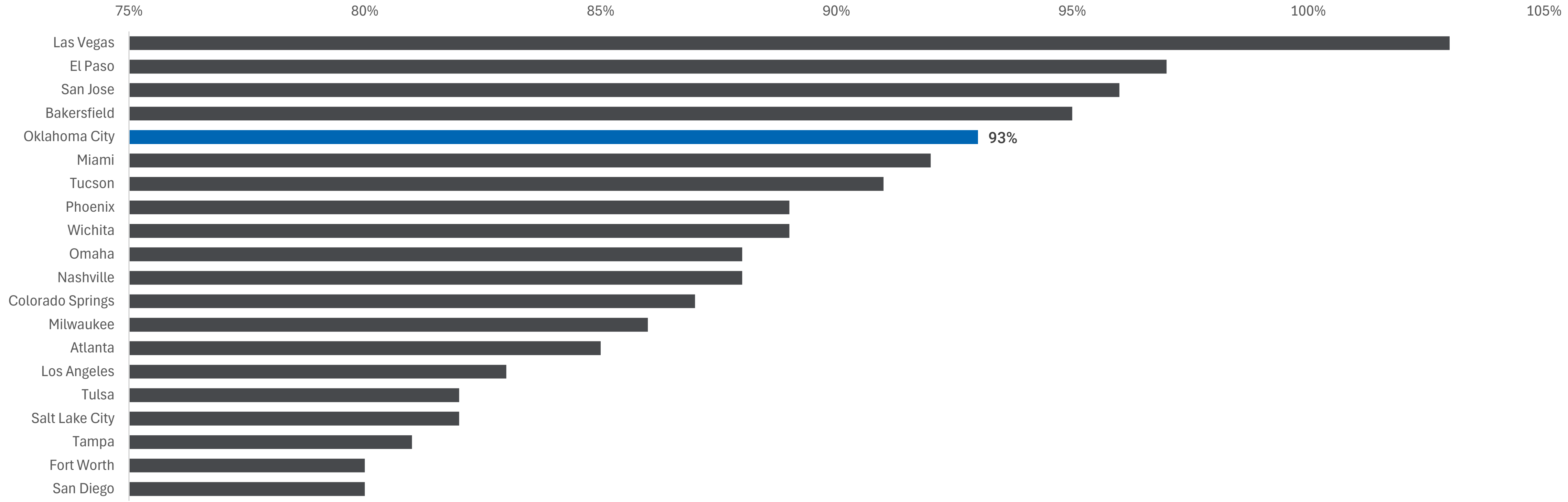
Merrill
A Bank of America Company

Crowe Dunlevy

As of: October 2023
Source(s): University of Toronto's School of Cities

DOWNTOWN OKC RANKED #5 IN FOOT TRAFFIC RECOVERY

2023 post-COVID foot traffic recovery in U.S. cities vs 2019

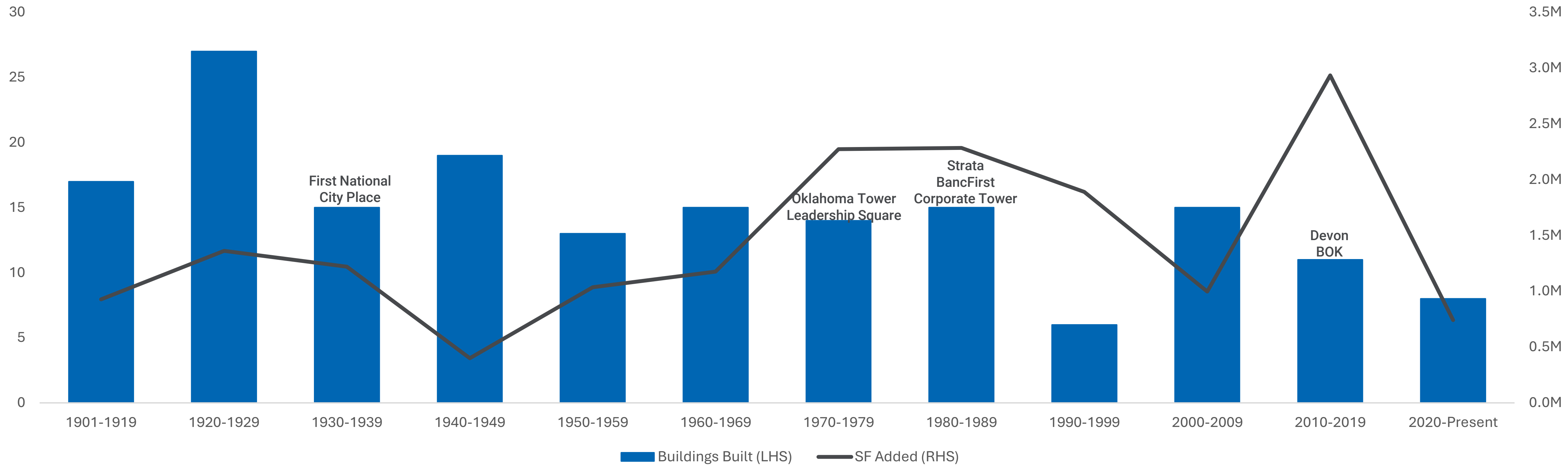


Oklahoma City demonstrated the **5th strongest Downtown recovery** in the U.S. following COVID-19, **reaching 93% of pre-pandemic foot traffic in 2023 vs. 2019**. This is based on cell phone mobility data from the University of Toronto's School of Cities.

Excludes buildings <25,000 SF
Source(s): CoStar

DOWNTOWN OFFICE DELIVERIES BY DECADE

Steady construction across 12 decades, with peak SF growth in the 2010s driven by Devon Energy's 1.8M SF HQ

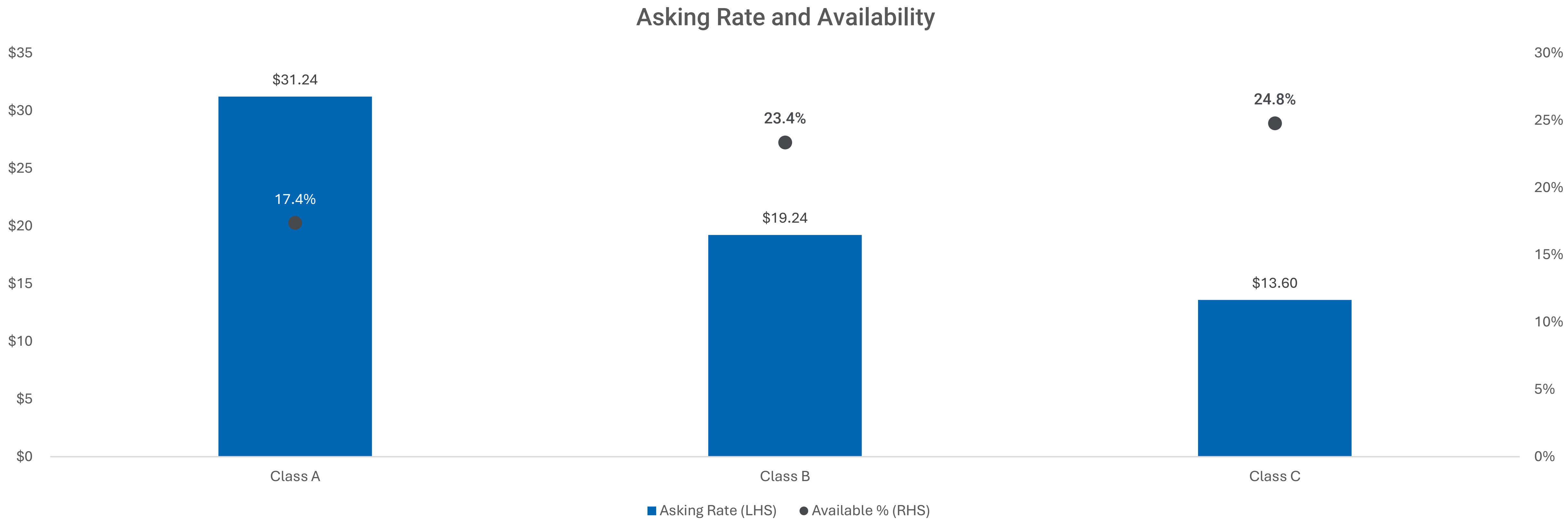


Downtown office inventory reflects steady construction across all eras, with notable peaks in the 1920s, the 1970s and 1980s, and 2010s. The most significant expansion came in 2010–2019, driven primarily by Devon Energy's 1.8M SF headquarters. This project substantially reshaped the Downtown skyline and expanded the overall office footprint.

Excludes buildings <25,000 SF
As of: February 2026
Source(s): Robinson Park, CoStar
NNN Asking Rates are Adjusted to FSG

FLIGHT TO QUALITY CONTINUES TO DRIVE DOWNTOWN OKC OFFICE MARKET

Class A commands the highest rents, with availability slightly elevated as newer properties move through lease-up



Class A rents have climbed sharply as tenants prioritize premium space, with new developments commanding $38–$45/SF. Class A availability is lower than Class B at 17.4% vs 23.4%, reflecting flight to quality.

As of: February 2026
Source(s): Robinson Park, CoStar

NEW DEVELOPMENT BOOSTS RATES AMID STRONG LEASING ACTIVITY

Four developments totaling 515,000 SF have delivered since 2024, and leasing ahead of schedule at a combined 64.5% occupancy

Convergence

230,000 SF | $28/SF NNN

53% occupied

The Citizen

160,000 SF | $29/SF NNN

76% occupied

Phillips Murrah

80,000 SF | $28/SF NNN

78.7% occupied

1204 N Hudson

45,000 SF | $35/SF NNN

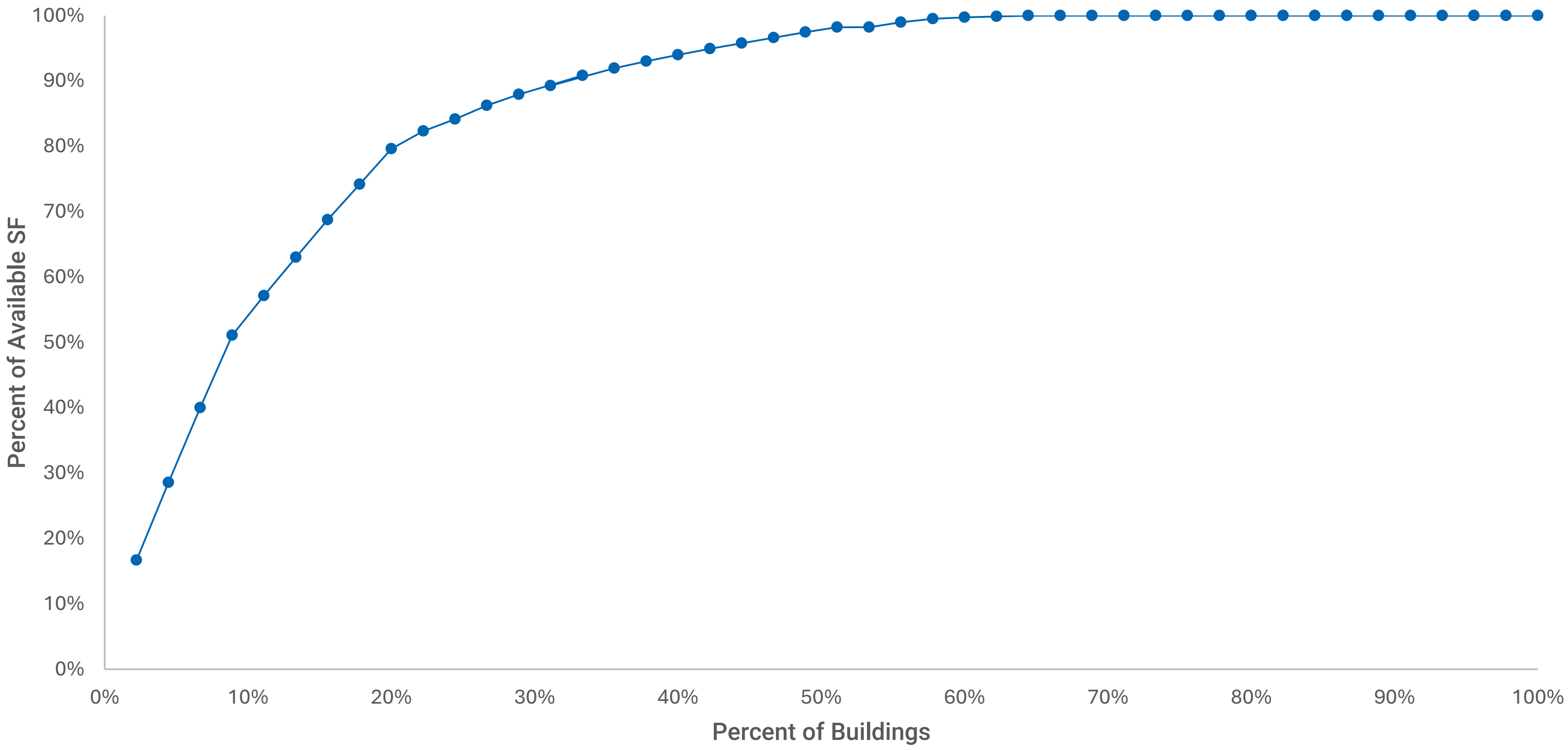
59.5% occupied

All four properties are leasing at record **Class A rates of $28–$35/SF NNN**, with the Phillips Murrah building leading at 78.7% occupancy. These results signal sustained demand for premium Downtown office space.

Excludes buildings <25,000 SF
As of: February 2026
Source(s): Robinson Park, CoStar

DOWNTOWN OKC VACANCY: CONCENTRATED, NOT WIDESPREAD

80% of available space is concentrated in just 20% of buildings, meaning the broader market is healthier than headline rates suggest



40% **of Buildings** have zero vacancies

9% **of Buildings** account for more than half of all available space

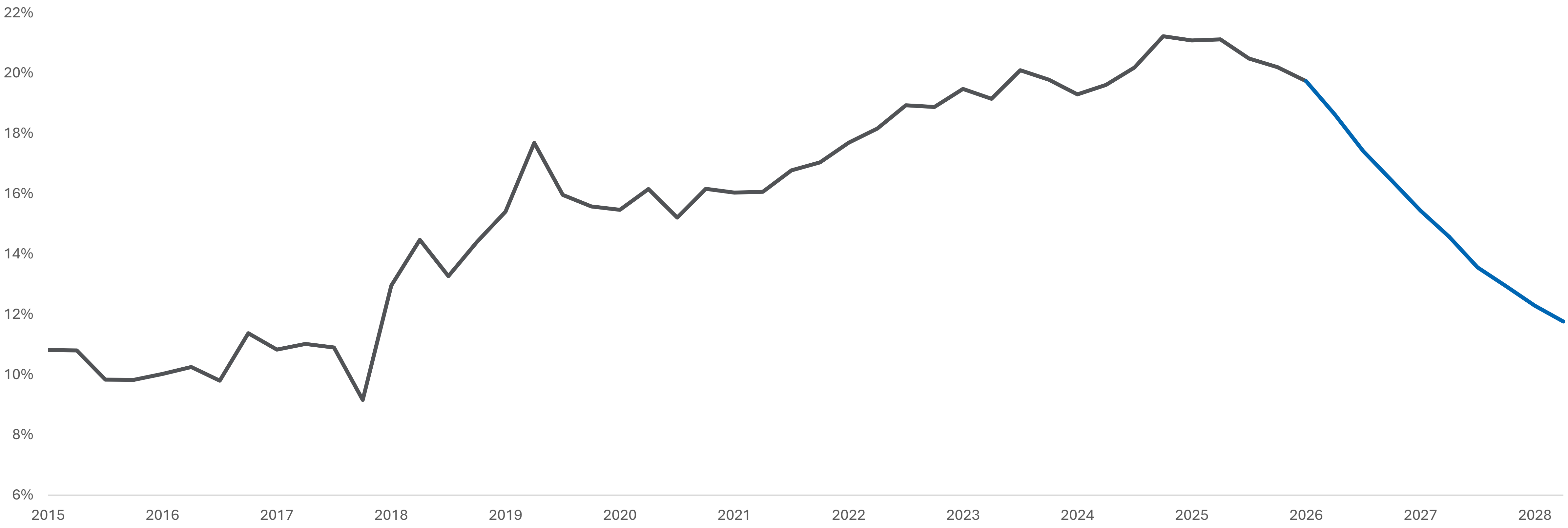
80% **of Availability** is concentrated in just 20% of buildings

Availability in Downtown OKC is a building-specific challenge, not a market-wide problem. 40% of buildings are fully occupied, and just 9% of buildings account for most of the available space. This suggests that targeted repositioning or redevelopment of a small number of assets could substantially improve headline vacancy rates.

Excludes buildings <25,000 SF
As of: January 2026
Source(s): Robinson Park, CoStar

AVAILABILITY PROJECTED TO FALL AS OFFICE CONVERSIONS TAKE PLACE

After peaking near 21.2% in late 2024, availability has dropped to 19.7%. It is forecast to continue falling toward roughly 12% by 2028



Post-COVID downsizing drove availability to a peak of ~21%, but lease adjustments have now stabilized. Office-to-residential conversions, supported by city TIF incentives, are also reducing inventory. As a result, **availability is forecast to decline to roughly 12% by 2028.**

As of: January 2026
Source(s): Robinson Park, Gardner Tanenbaum, Cornerstone Development, CoStar, media reports

OFFICE TO MULTIFAMILY CONVERSIONS

Outdated office space is being transformed into housing. Five buildings totaling 742,568 SF have or are being repurposed for multifamily use, boosting Downtown housing supply and easing office vacancy

Court Plaza

Sold December 2024 for $3M ($34/SF)

78,244 SF | 100 Units | Under Renovation

Local owner Cotton Exchange Investments is converting the former Court Plaza building into residential apartments.

The Robinson

Sold July 2024 for $10.25M ($59/SF)

176,076 SF | 106 Units | Under Renovation

Local owner Gardner Tanenbaum plans to convert the Robinson Renaissance Building into residential apartments, adaptively reusing the historic property to add housing and retail.

100 Park Ave

Sold November 2022 for $6.5M ($64/SF)

101,178 SF | 120 Units | Complete

101 N Broadway

Sold May 2022 for $6M ($59/SF)

100,845 SF | 145 Units | Complete

Local owner Gardner Tanenbaum transformed two 1920s office buildings into The Harlow, a sleek, upscale apartment community named for 1920s movie star Jean Harlow, featuring amenity-rich offerings such as a duckpin bowling alley, private theater and media room, game room and arcade, and dedicated co-working spaces.

First National

Sold December 2017 for $10.5M ($37/SF)

286,225 SF | 195 Units | Complete

Ownership team led locally by Cornerstone Development transformed the iconic First National Center into a mixed-use destination featuring apartments, retail, and a Marriott Autograph hotel.

Since 2017, Downtown has **removed 742,568 SF of office inventory** across five buildings that have been, or are being, converted to multifamily housing with support from city TIF incentives. This process is increasing Downtown housing while also easing office vacancy.

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MULTIFAMILY

DOWNTOWN MULTIFAMILY SNAPSHOT

Market-rate, 25+ units
As of: January 2026
Source(s): Robinson Park, CoStar

CLASS A

19

PROPERTIES

3,734

TOTAL UNITS

CLASS B

8

PROPERTIES

1,145

TOTAL UNITS

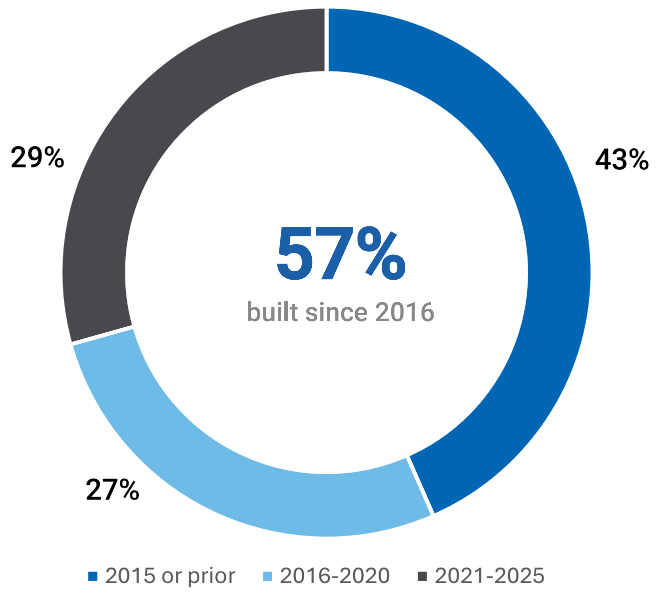
CLASS A MARKET SHARE

Downtown Oklahoma City's multifamily market is **heavily weighted toward Class A assets**, which account for 70% of properties and 77% of all units. This suggests a market oriented toward premium renters and newer construction rather than workforce housing.

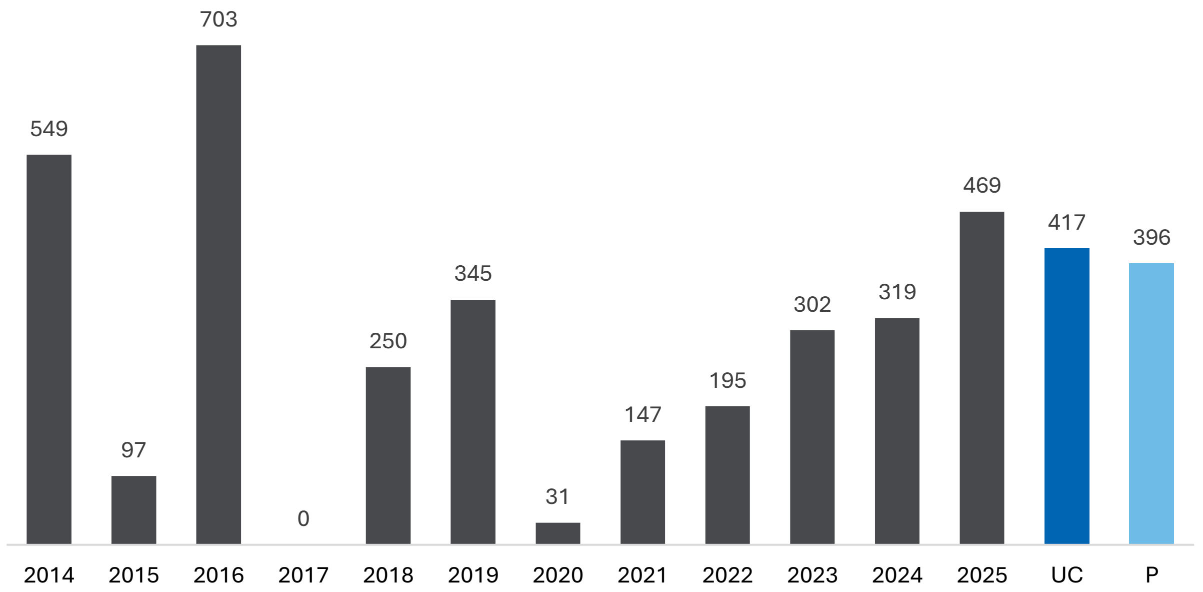
Market-rate, 25+ units
As of: January 2026
Source(s): Robinson Park, CoStar

ONGOING RESIDENTIAL GROWTH SIGNALS STRONG CONFIDENCE IN DOWNTOWN OKC

MULTI-HOUSING UNITS BY VINTAGE



UNITS DELIVERED



57% of Downtown OKC's multifamily units have been built since 2016, underscoring strong sustained demand. Strong deliveries over the last decade reflect investor confidence in Downtown's long-term appeal. New units are typically absorbed and stabilized at 90% occupancy within 18–24 months.

As of: January 2026
Source(s): Robinson Park, CoStar

KEY MULTIFAMILY DEVELOPMENTS AND CONVERSIONS SINCE 2018

NEW CONSTRUCTION

West Village

345 units | Delivered: 2019

Infill residential development that added modern apartment living to the west urban core, supporting revitalization by introducing housing options in the West Village District.

HISTORIC CONVERSION

The Harlow

265 units | Delivered: 2025

Upscale residences set within historic Downtown buildings combine 1920s architectural charm with modern amenities, complemented by more than 4,300 SF of street-level retail space.

NEW CONSTRUCTION

Steelyard

250 units | Delivered: 2018

A modern urban community defined by brick architecture, balconies, and a distinctive gateway entrance, located in Bricktown. A proposed second phase would add 155 additional units.

HISTORIC CONVERSION

First National Center

193 units | Delivered: 2022

Renovation transformed historic Art Deco landmark into a vibrant mixed-use destination, incorporating luxury apartments while preserving and reactivating one of Downtown’s most iconic buildings.

NEW CONSTRUCTION

The Spaniard

27 units | Delivered: 2024

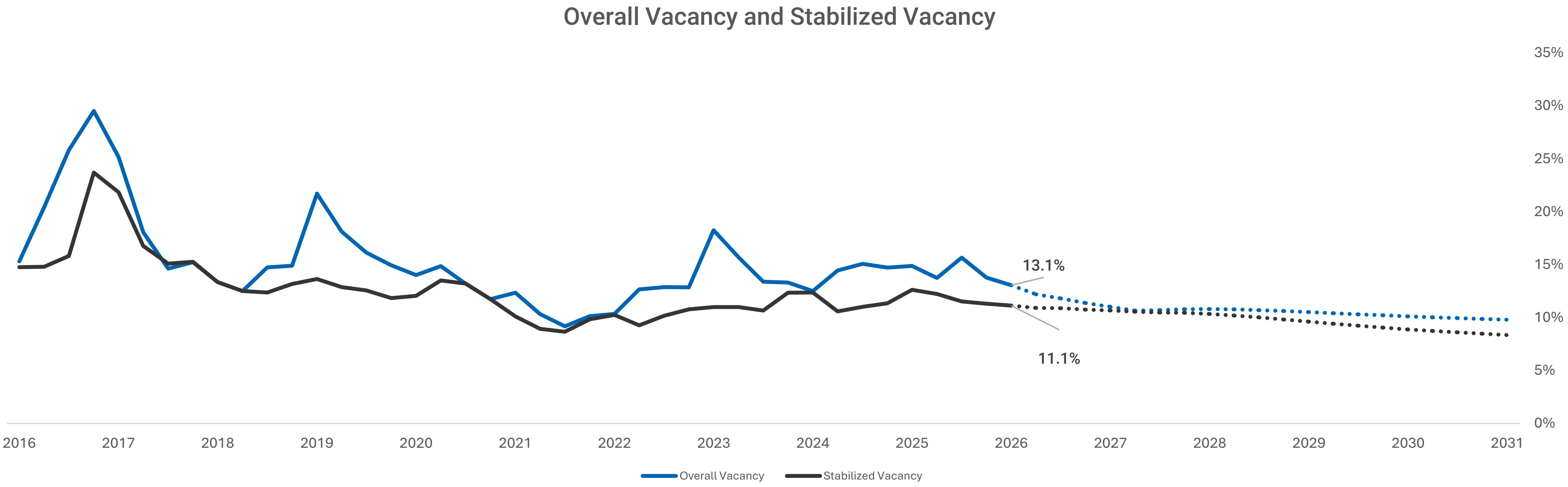
Luxury townhome community on Classen Drive with Spanish-inspired design, modern amenities, and walkable access to Midtown dining and entertainment.

Downtown has added 1,080 units across these five developments since 2018, spanning luxury new construction and landmark historic conversions.

Market-rate, 25+ units
As of: January 2026
Source(s): CoStar

VACANCY HOVERING NEAR 11%

Vacancy has dropped significantly over the last decade



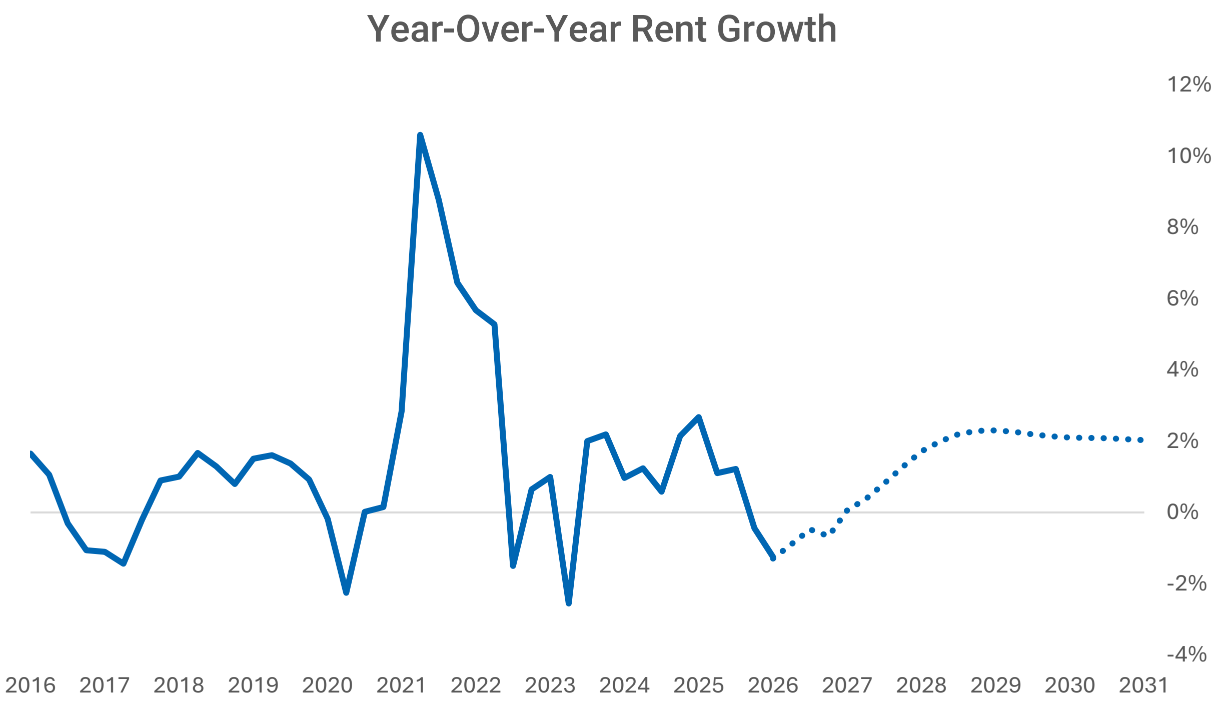
In 2021, stabilized vacancy declined to a record low of 8.7% before normalizing to approximately 11%, in line with pre-COVID levels. New supply is typically absorbed to 90% occupancy within 18–24 months. Stabilized vacancy is projected to trend downward from current elevated levels, reflecting improving absorption.

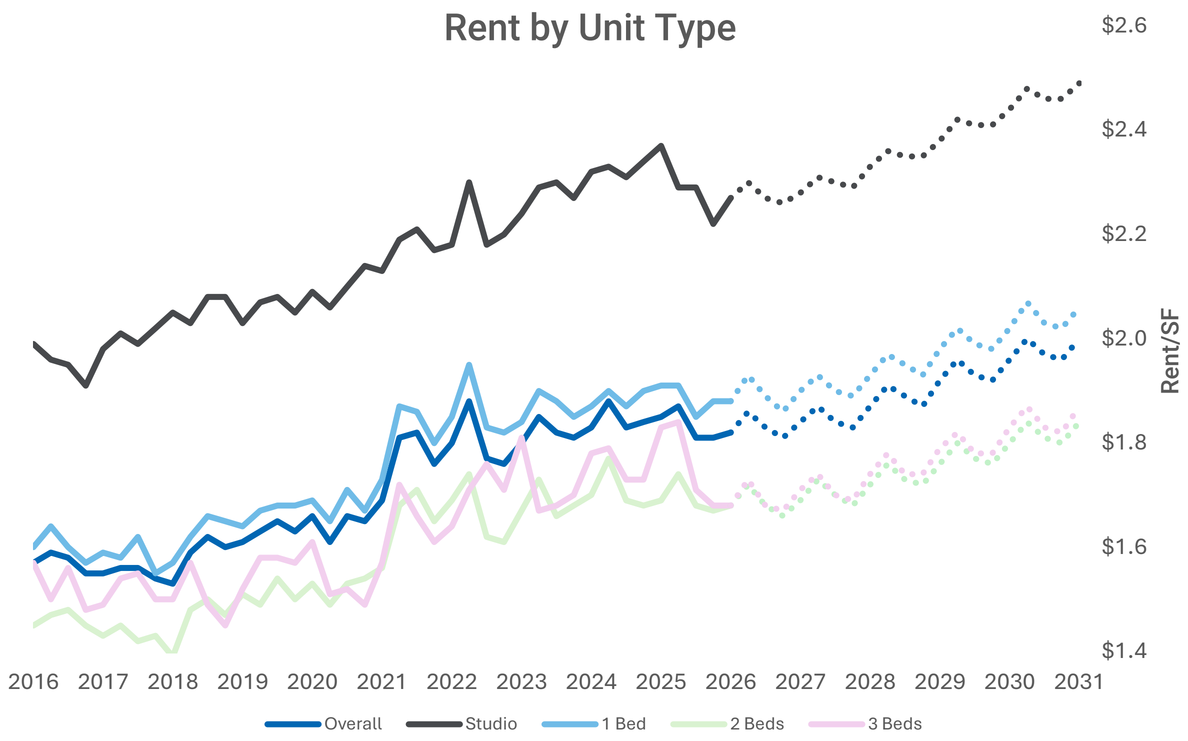
Stabilized vacancy: Vacancy excluding properties in initial lease-up (considered stabilized after 18 months or once 90% occupied.
Overall vacancy: All vacant space in the market, including newly delivered buildings still leasing up.

Market-rate, 25+ units
As of: January 2026
Source(s): CoStar

RENT GROWTH MODERATING AFTER POST-PANDEMIC SURGE

Average rent sits at $1,486/month ($1.82/SF), with growth moderating to historical low-single-digits



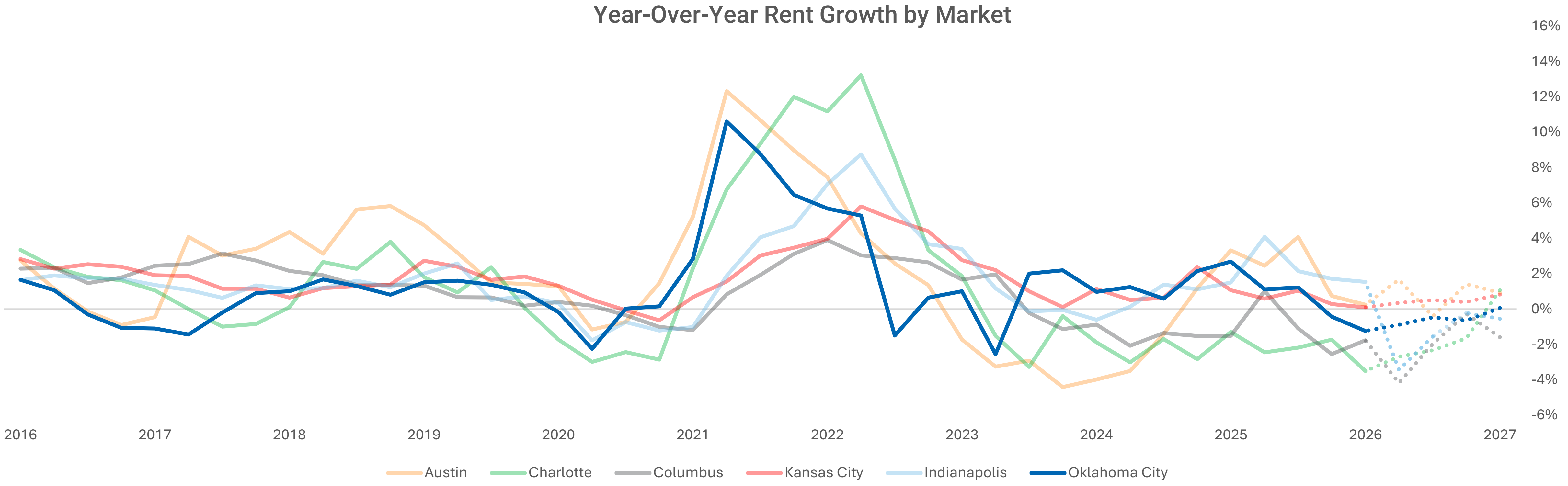


After an outsized 2021–22 surge, rent growth has normalized back toward low single digits. Forecasts project a steady ~2% annual growth from 2027 onward.

Market-rate, 25+ units
As of: January 2026
Source(s): CoStar

RENT GROWTH STABILIZES ACROSS PEER MSAS

Near-term rent growth is projected to moderate across OKC and peer markets, but long-term demand drivers and fundamentals remain intact

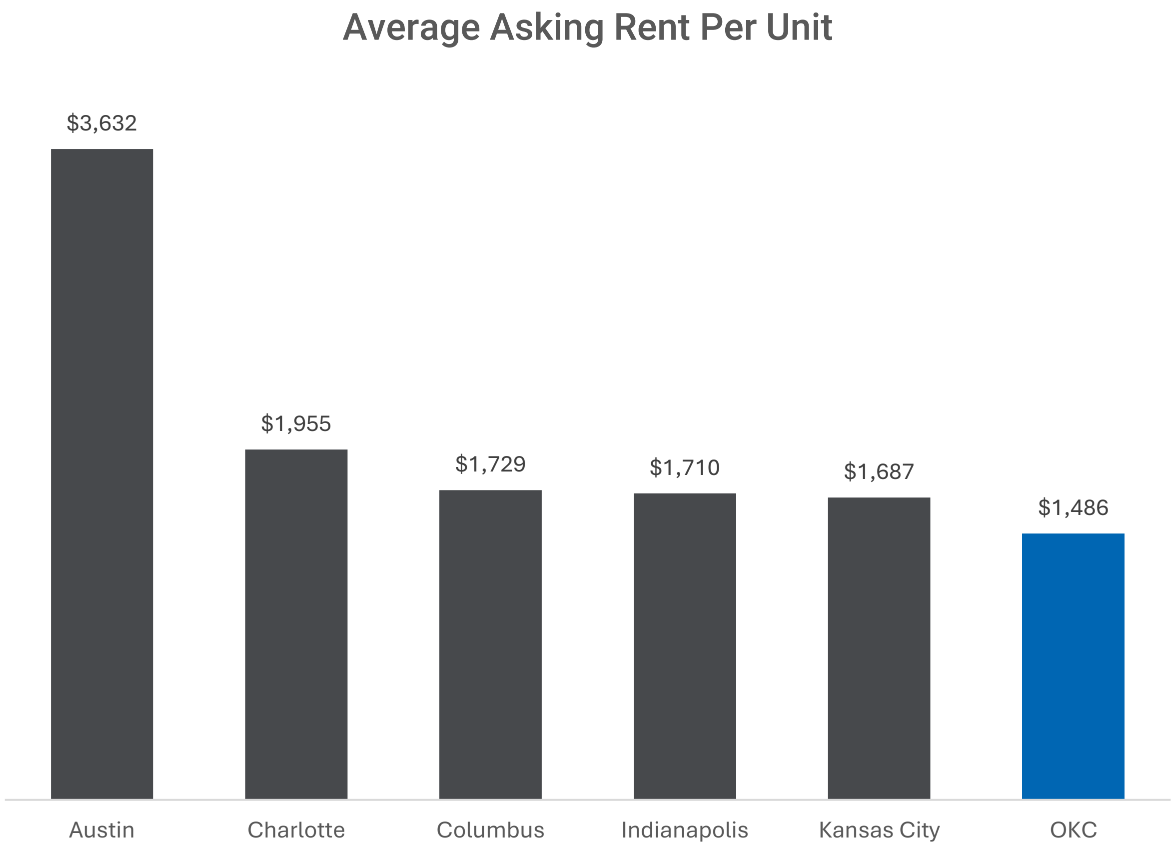


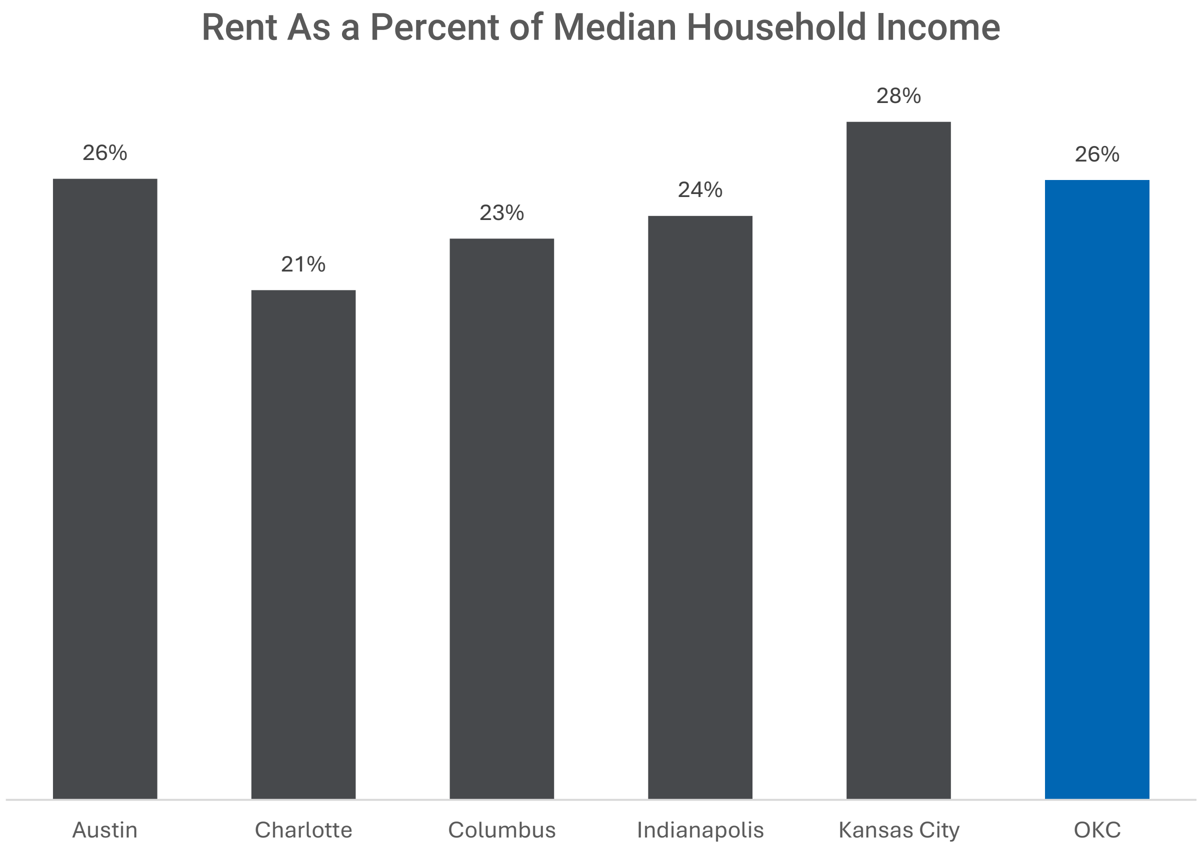
Following a temporary pandemic-era dip and subsequent surge, Downtown Oklahoma City is seeing a pullback in rent growth, but it continues to outperform some comparable markets.

As of: January 2026
Source(s): Esri, CoStar

OKC RENTS ARE LOW IN ABSOLUTE TERMS, LESS SO RELATIVE TO INCOME

Downtown OKC ranks lowest in average rent among peer markets but is towards the upper end of the cost spectrum





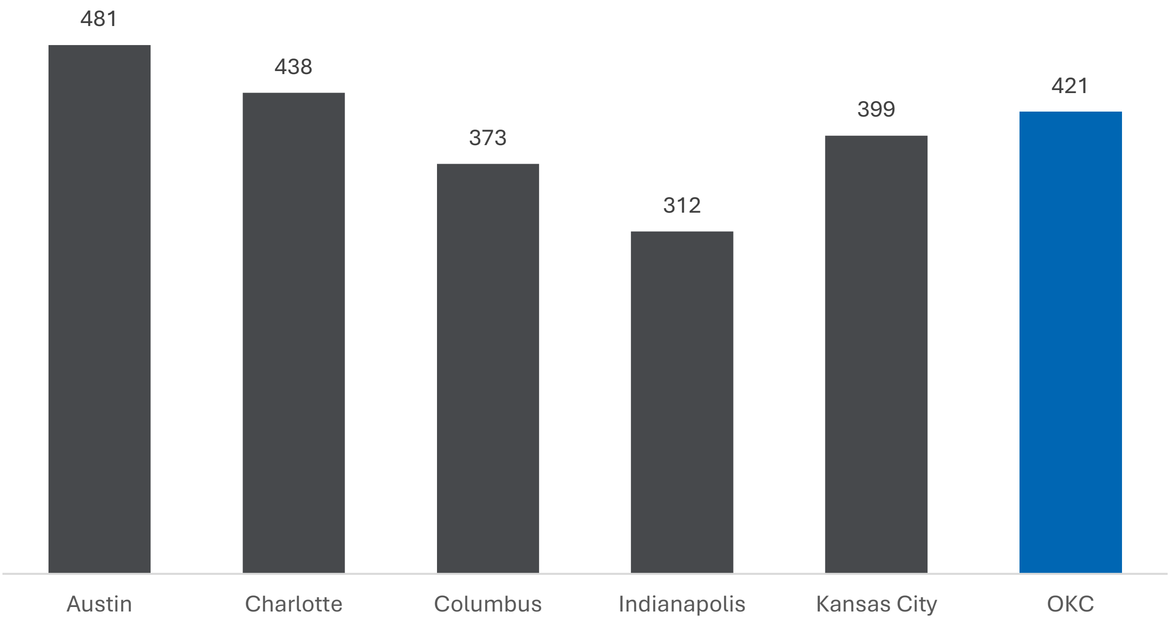
At $1,486 per month, Downtown OKC has the lowest average rent among peer markets in absolute dollars yet rent represents about 26% of the median household income, placing it toward the upper end of the cost spectrum relative to local income levels. Importantly, this 26% share remains below the widely recognized federal affordability benchmark of 30%, meaning housing costs are still considered affordable relative to income.

As of: January 2026
Source(s): Esri, CoStar, Zillow, Oklahoma County Assessor

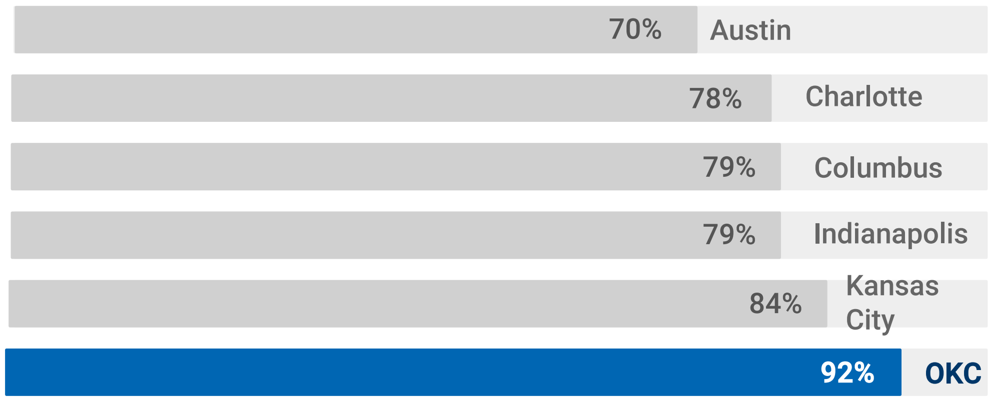
DOWNTOWN OKC HOUSING: RENTER-ORIENTED WITH ROOM TO GROW

High apartment concentration supports a 92% renter share

Apartment Units Per 1,000 people



92% of downtown residents rent



Downtown OKC is overwhelmingly renter-oriented, with limited for-sale options that typically start around $500,000 and can exceed $2 million. This creates an opportunity to strengthen Downtown’s residential mix through measured for-sale deliveries that attract higher-income households seeking to own, rather than rent, in a lively urban setting.

As of: January 2026
Source(s): Esri

STRONG PROJECTED POPULATION GROWTH THROUGH 2030

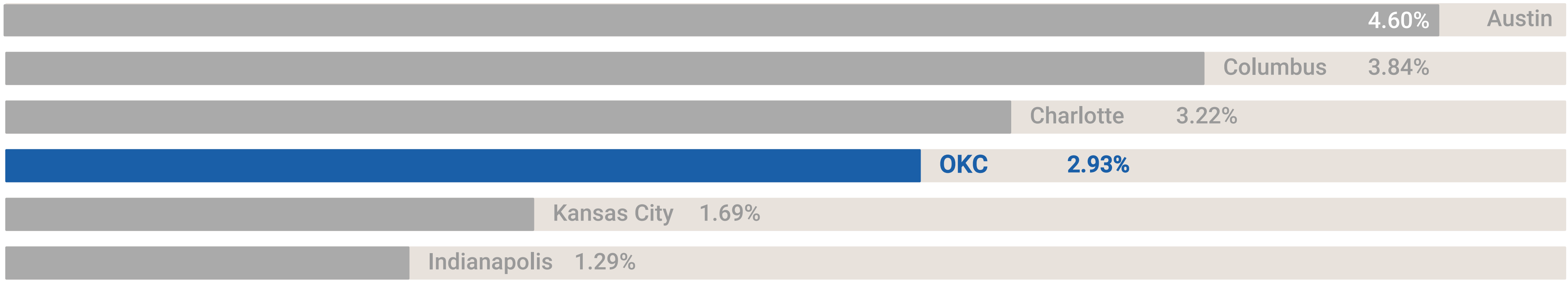
Downtown OKC's 2.93% projected annual growth outpaces Kansas City and Indianapolis' urban cores

2.93%

projected annual growth rate · 2025–2030

7× the U.S. national rate
U.S. projected annual growth: 0.42%

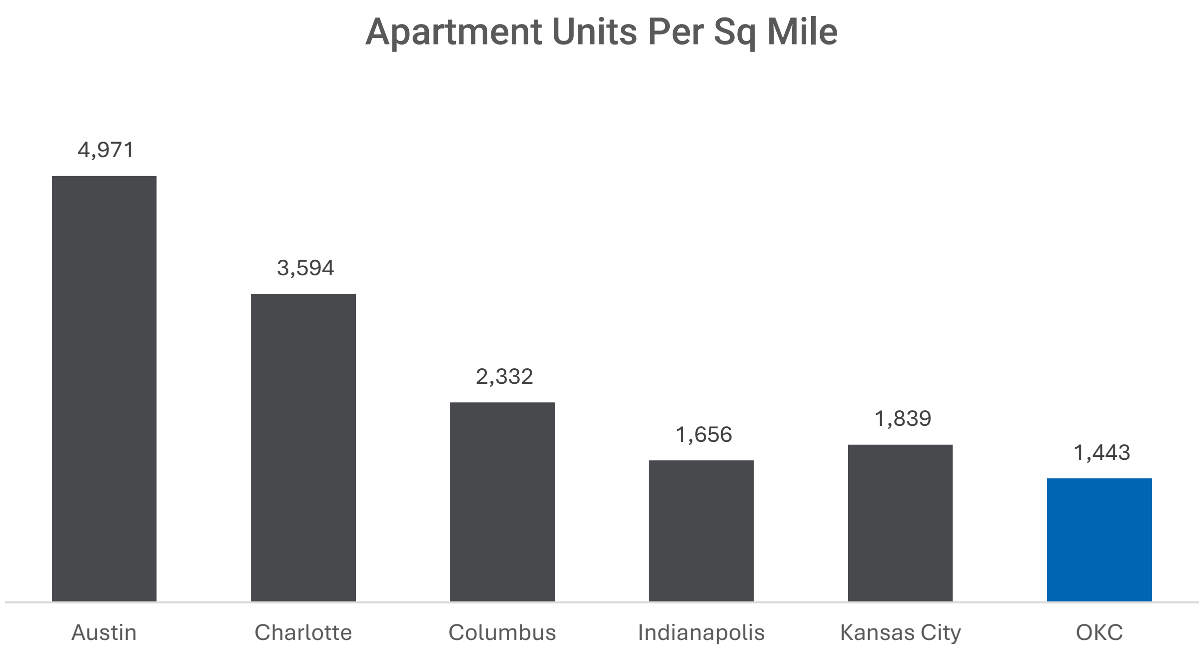
With solid projected population growth through 2030, Downtown OKC positions itself competitively against peer cities, while maintaining affordability advantages over faster-growing Austin, Columbus and Charlotte.

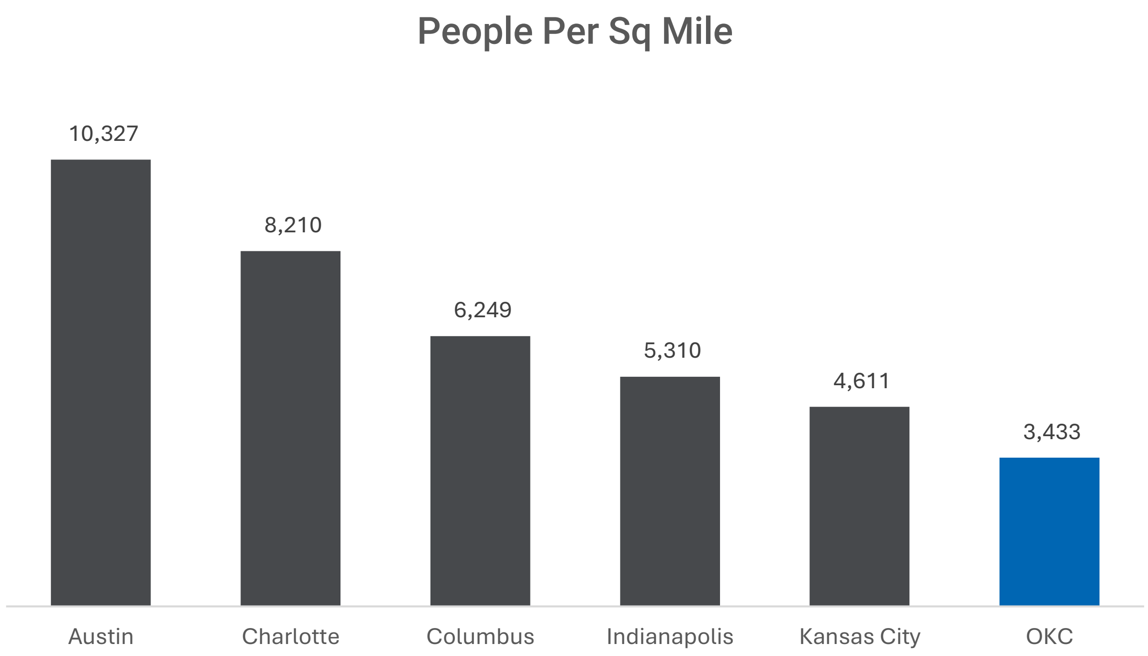


As of: January 2026
Source(s): Esri, CoStar

ROOM TO GROW IN DENSITY AND DEVELOPMENT

Downtown OKC has extensive vacant tracts for new infill residential development opportunities





With just 1,443 apartment units per square mile and 3,433 people per square mile, Downtown OKC ranks last among peer cities in population density and unit density. Downtown's multifamily development has historically been more spread out and low-rise, reflecting the area's ample supply of developable land. Over time, additional infill can help move the city toward the level of urban vitality seen in peer downtowns. In comparison, Austin and Charlotte have higher density largely because of the significant mid-rise and high-rise residential construction added to their downtown cores in recent years.

As of: January 2026
Source(s): Downtown OKC, Redfin

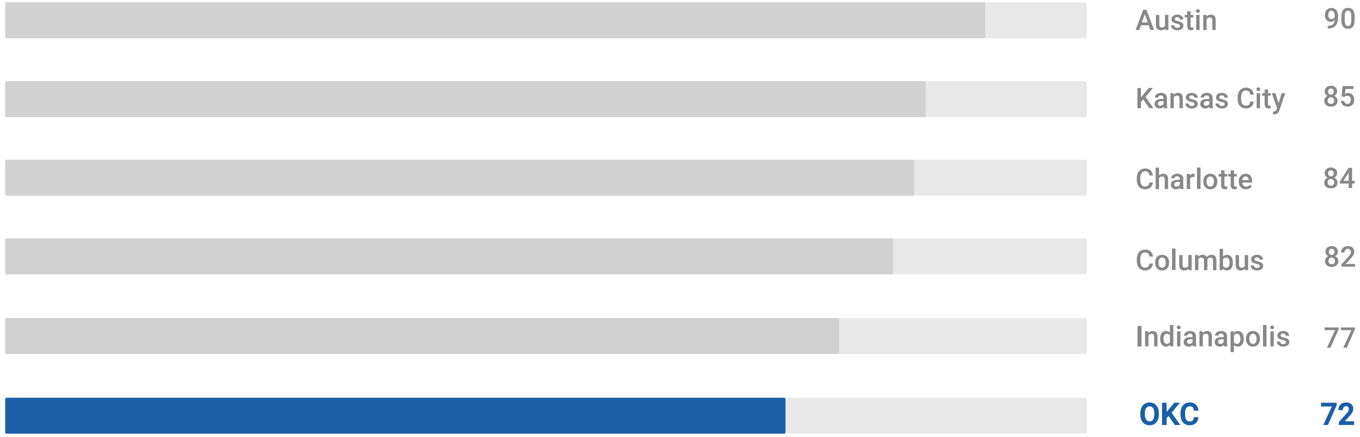
UNIFYING OKC'S URBAN CORE THROUGH WALKABILITY & TRANSIT

Strengthening pedestrian and bicycle connections is critical to linking the city's vibrant but disconnected urban districts

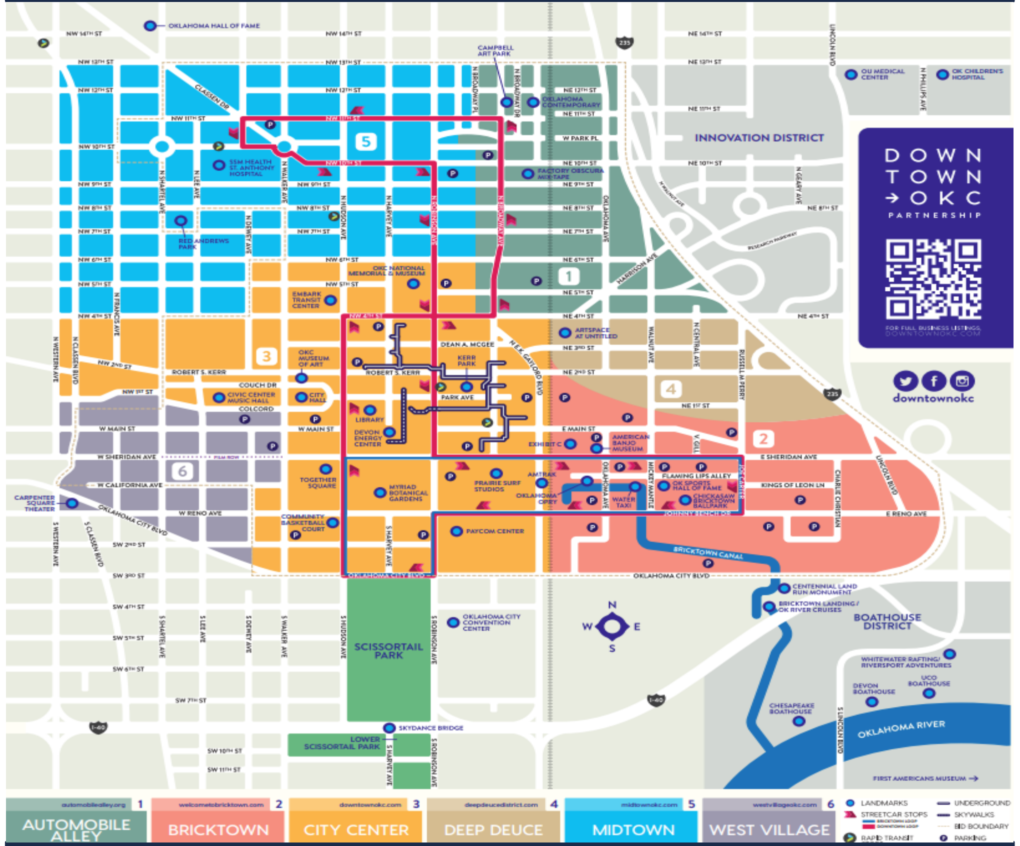
Extending the streetcar system would further improve connectivity, particularly with the OU Health Sciences Center.

WALKABILITY SCORES

Source: Redfin | 100 = car-free daily errands



Downtown Districts & Streetcar Network



NEXT STEP: Extend streetcar line to OU Health Sciences Center

HOSPITALITY

As of: March 2026
Source(s): STR

DOWNTOWN OKC HOTEL ROOM MIX

Despite an 85% concentration in Upscale and above, Downtown OKC remains underrepresented in top-tier luxury hotels like JW Marriott

CLASS TYPE

Luxury	Upper Upscale	Upscale	Upper Midscale	Midscale
23.9%	33.8%	27.3%	11.8%	3.2%
	Largest segment			
3 Hotels	8 Hotels	9 Hotels	4 Hotels	2 Hotels

SERVICE TYPE

Full-Service
53.7%

Limited-Service
46.3%

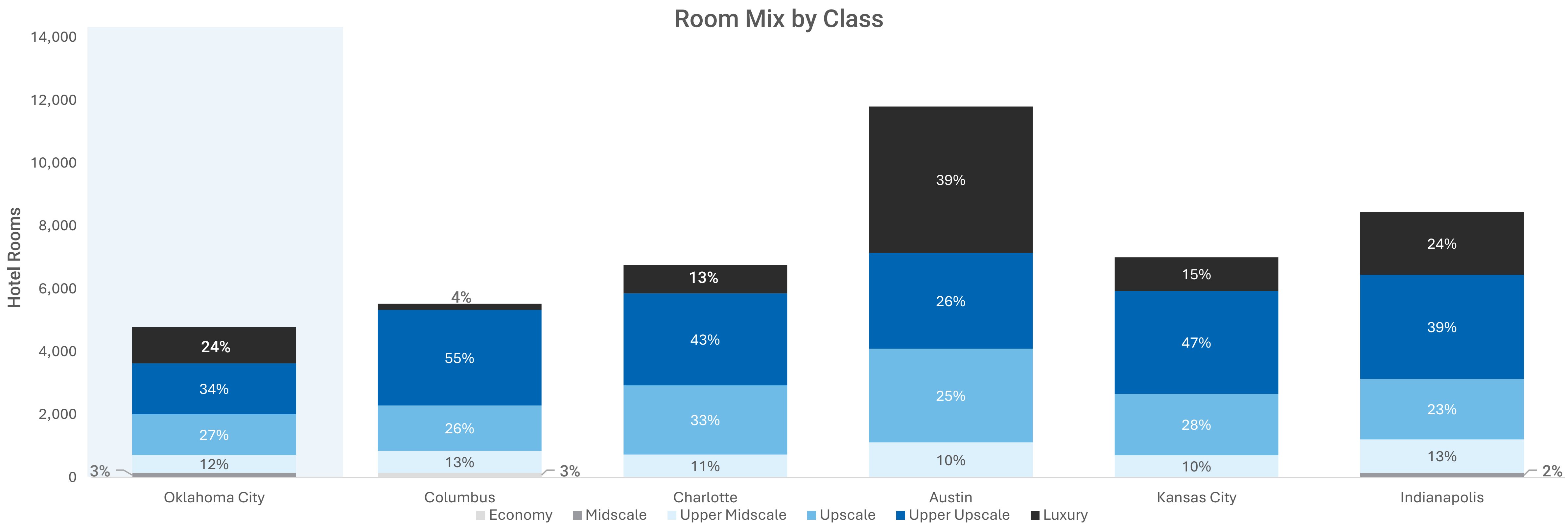
Full-Service: 10 hotels | **Limited-Service: 16 hotels**

Hotel Classifications
Luxury: Highest-end hotels offering exceptional service, premium amenities, and prime locations. **Upper Upscale:** High-end full-service hotels, just below luxury in quality and price. **Upscale:** Full-service hotels providing modern comfort and style at moderate prices. **Upper Midscale:** Select-service hotels with upgraded amenities, balancing comfort and value. **Midscale:** Budget-friendly hotels with basic services and limited amenities.
Service Types
Full Service: Typically found in Upscale, Upper Upscale, and Luxury properties; includes a wide range of onsite amenities such as restaurants, meeting spaces, fitness centers, or spas.
Limited Service: Offers fewer facilities and amenities, usually without a full-service restaurant; common in Economy, Midscale, or Upper Midscale classes.

As of: March 2026
Source(s): STR

OKC HAS A COMPETITIVE UPPER UPSCALE AND LUXURY ROOM MIX

Oklahoma City's Upper Upscale and Luxury concentration has grown significantly, now competitive with peer markets



Of Downtown Oklahoma City's 4,779 hotel rooms, 58% are Upper-Upscale or Luxury, propelled by recent additions like OKANA and the Omni. While OKC has fewer total downtown rooms than peer markets, it has repeatedly proven it can absorb peak demand, successfully supporting large-scale events such as multiple runs of the NBA Playoffs and the NBA Finals in 2025. Austin still leads peers in downtown room count, fueled by large-scale events like SXSW, Austin City Limits, and Formula 1.

As of: March 2026
Source(s): STR

FEATURED DOWNTOWN-AREA HOTELS

There are 4,779 hotel rooms in and in direct proximity to Downtown OKC. These hotels help recruit conferences and boost tourism. During the 2025 NBA Playoffs, top properties sold out at rates of more than $1,000 per night

Omni Hotel

651 Rooms | LUXURY

Omni Hotels & Resorts

Flagship full-service hotel, opened in 2021, anchoring the convention district with direct connectivity to the OKC Convention Center.

OKANA Resort & Indoor Waterpark

404 Rooms | LUXURY

Independent Waterpark Resort

Chickasaw Nation's resort destination, which opened in 2024, features a waterpark and entertainment complex on the south shore of the Oklahoma River just southeast of Downtown.

Skirvin Hilton

225 Rooms | UPPER-UPSCALE

Hilton Hotels & Resorts

Historic landmark hotel opened in 1911, beautifully renovated in 2025, and one of Oklahoma's most iconic properties.

The National

146 Rooms | UPPER-UPSCALE

Marriott Autograph Collection

Boutique hotel in a restored historic tower that opened in 2022, delivering modern luxury in the heart of Downtown's business core.

Colcord Hotel

108 Rooms | UPPER-UPSCALE

Curio Collection by Hilton

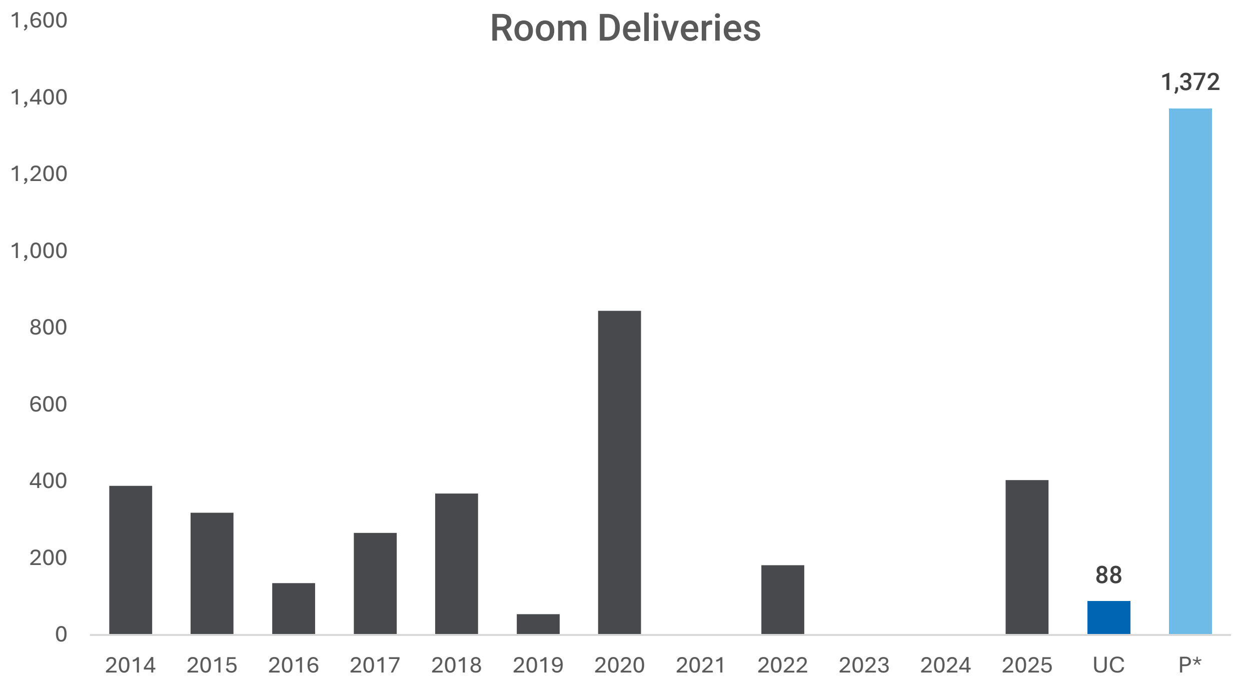
OKC's first skyscraper, reimagined as a boutique hotel that opened in 2006, blends 1910 architecture with contemporary design.

Downtown OKC's 4,779 hotel rooms span midscale to luxury class properties. This inventory anchors the convention and tourism economy.

As of: January 2026
Source(s): STR

DOWNTOWN HOTEL ROOM GROWTH

Targeted public incentives, infrastructure improvements, and tax programs helped recent Downtown OKC hotel and adaptive-reuse projects materialize despite rising costs



Omni Oklahoma City Hotel ($241M, adjacent to the convention center): ~$85M in public incentives and infrastructure.

Renaissance Hotel (~$100M, Bricktown): $10–$12M in TIF plus infrastructure upgrades.

First National Center → The National Hotel ($275M mixed-use): ~$30M in historic tax credits, TIF, and other incentives.

OKANA Resort & Indoor Waterpark ($400M): Chickasaw Nation–funded, with sales tax rebates and City infrastructure and site improvements.

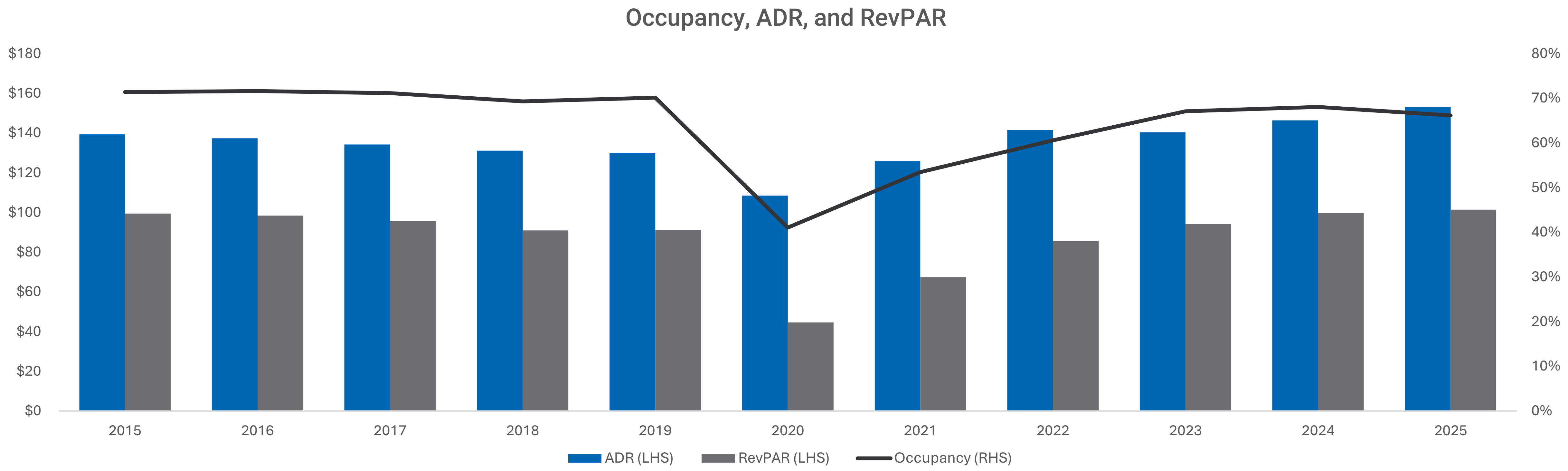
Skirvin Hilton: acquired by Robinson Park in Dec 2022 and renovated.

> 88 rooms are under construction, and 1,372 rooms are proposed or planned for Downtown OKC, representing the largest hotel pipeline in over a decade. This momentum is being driven by public-private partnership structures that have proven essential to making hospitality projects financially viable in today's cost environment.

*P : Planned or Proposed

DOWNTOWN OKC HOTELS BOUNCED BACK AFTER PANDEMIC

After steep declines in 2020, occupancy, ADR, and RevPAR have steadily recovered, with RevPAR surpassing pre-pandemic levels by 2023



From 2016 to 2019, occupancy hovered around 70%, and average daily rate (ADR) held steady at $130 to $140, keeping RevPAR at about $94. The pandemic pushed occupancy sharply lower, but occupancy began recovering in 2021 and stabilized in the mid- to high-60% range by 2024, reflecting renewed market strength. By 2022, ADR had surpassed pre-pandemic levels and currently sits at $153. RevPAR, which dropped by more than 50% in 2020, has also rebounded and now exceeds pre-pandemic levels.

Occupancy: The percentage of available rooms sold during a specific time period.
ADR (Average Daily Rate): The average rental income per paid occupied room during a specific time period.
RevPAR (Revenue per Available Room): A performance metric that indicates how effectively a hotel fills rooms at an average rate.

RETAIL


LET'S GO THUNDER
at&t
BOK
CARDINAL
ENGINEERING
ALLIED ARTS
RAWHIDE
PURVEYORS OF FINE
ANTIQUES & COLLECTIBLES
COFFEE SLINGERS
HIDEAWAY
PIZZA
OPEN

Source(s): Census.gov, STDB, Esri

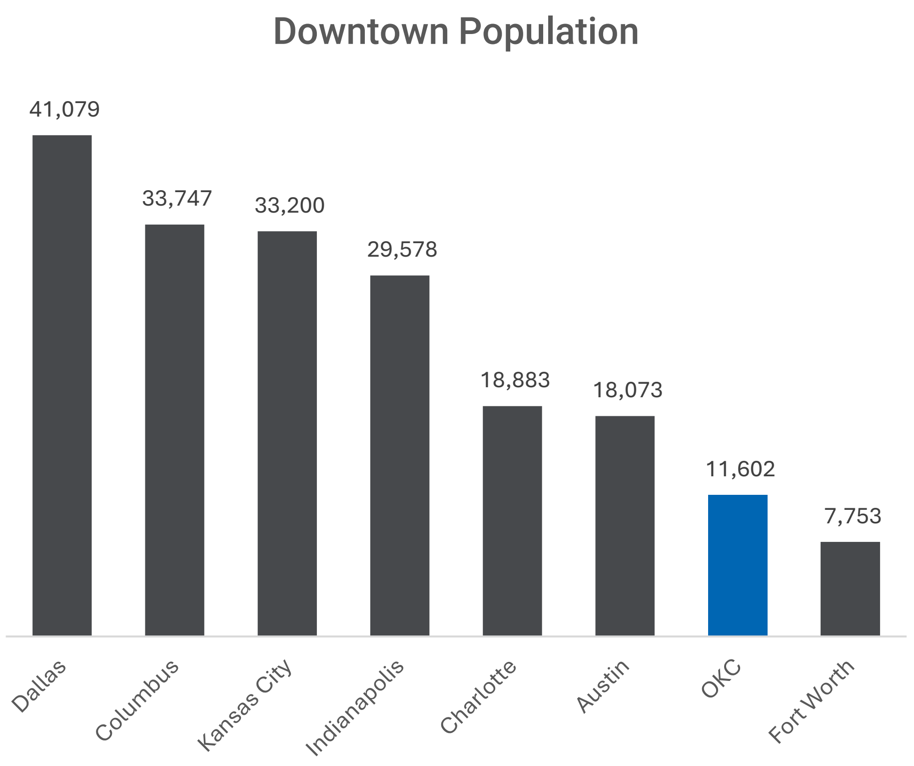
OKC HAS SECOND-SMALLEST DOWNTOWN POPULATION AMONG PEERS

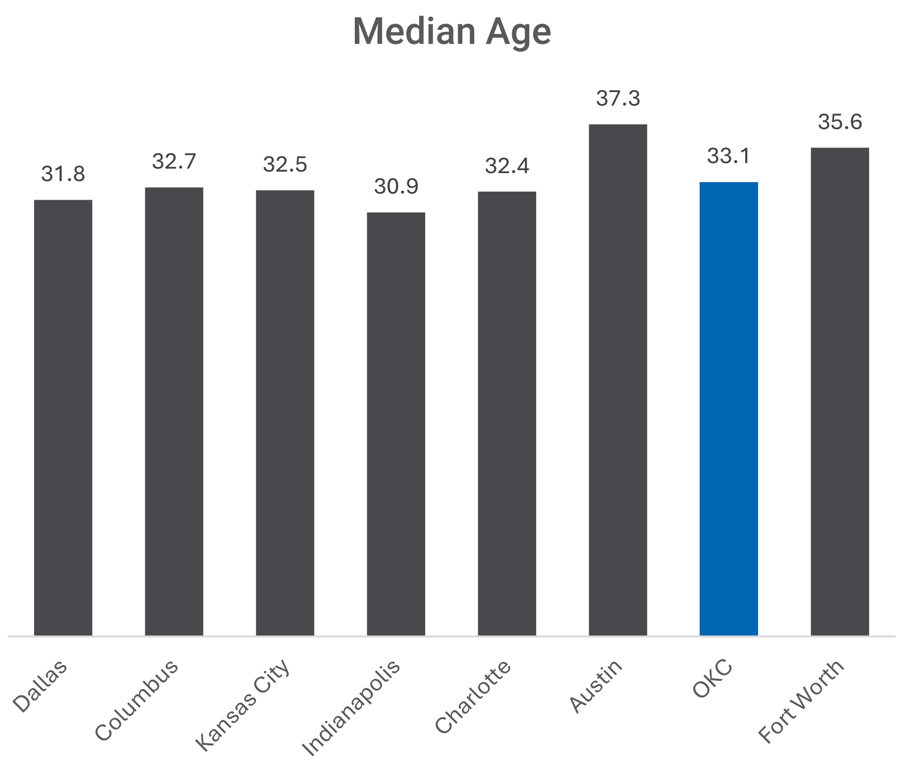
11,602

OKC Downtown Residents

~18,400 short

of the ~30,000 threshold most national retailers require



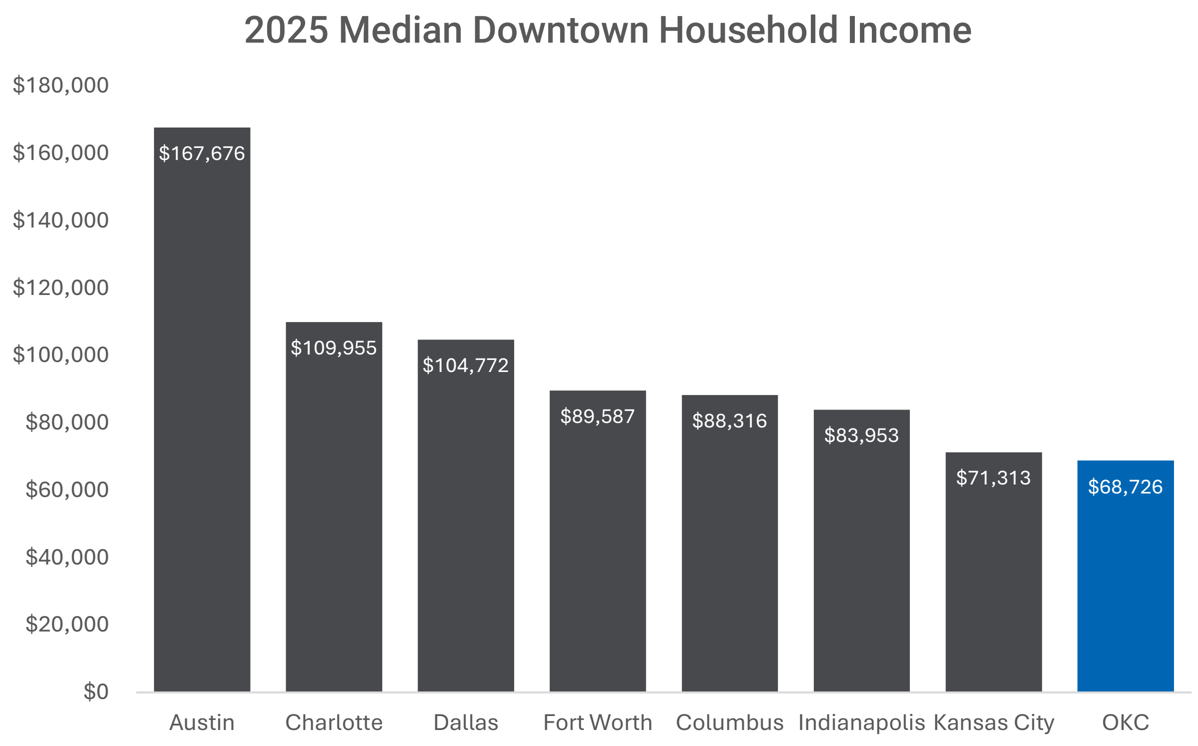


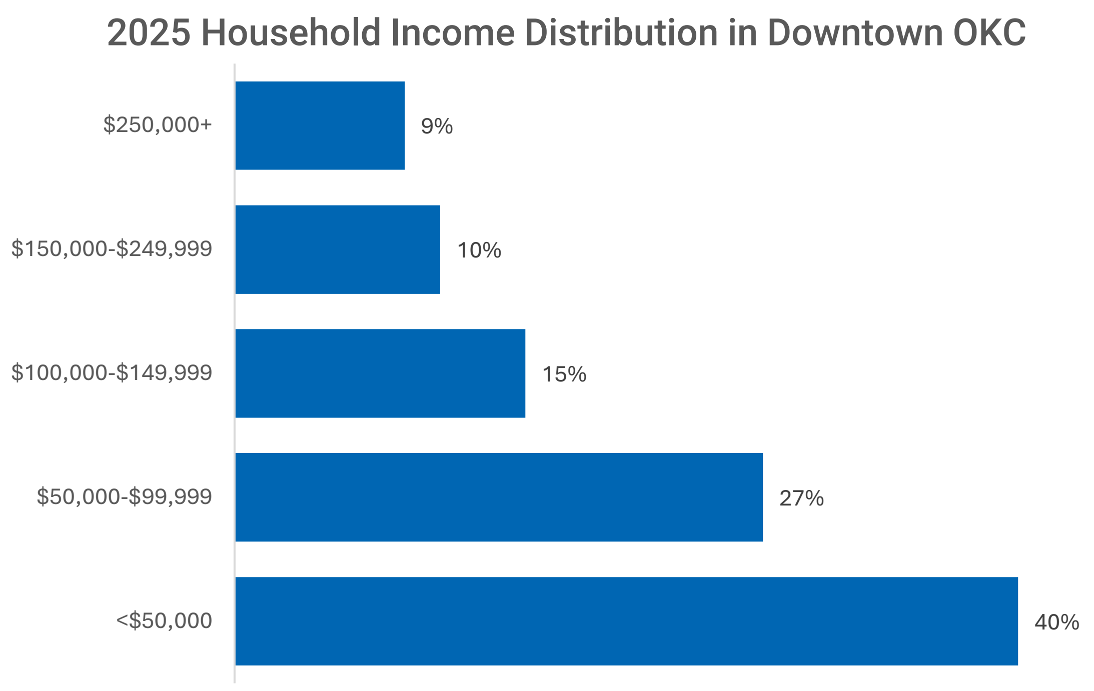
Despite having a median age older than some peer cities, Oklahoma City's median age of 33.1 remains well below the national median of 39.1. This younger demographic is more likely to spend discretionary income on dining, fitness, and experience-driven retail.

Source(s): STDB, Esri

DOWNTOWN OKC HAS LOWEST INCOME AMONG PEERS

Downtown OKC trails peer cities in median income, with nearly 40% of households earning under $50K



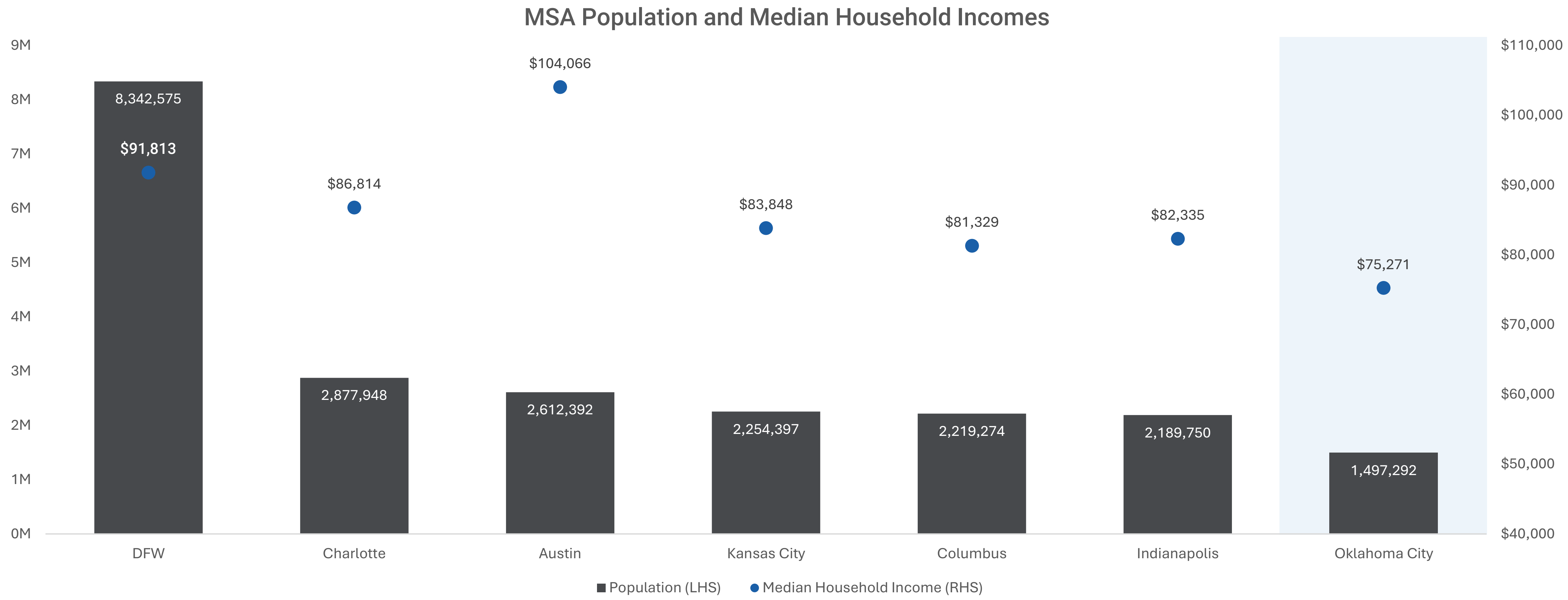


Downtown OKC has the lowest median household income among its peer cities ($68,726), and approximately 40% of downtown households earn less than $50,000 annually. This income profile constrains demand for premium retail concepts. Growing the high-income resident base through employment and higher priced housing is the most direct path to unlocking retail demand.

As of: January 2026
Source(s): STDB, Esri, U.S. Census Bureau

OKC MSA TRAILS PEER MSAS IN INCOME AND POPULATION

Expanding to the full MSA, population and income levels in the OKC Metro are still below what many premier retailers target for expansion



Note: Although not a direct OKC peer, DFW is included as the closest major metro and a key regional shopping hub for OKC, offering a wider selection of national and specialty retailers.

RETAIL GAP ANALYSIS: LUXURY

The OKC MSA has fewer luxury retailers than peer MSAs, highlighting a major gap and growth opportunity

	HERMÈS PARIS	CHANEL	LOUIS VUITTON	GUCCI	TIFFANY&CO.	LUCCHESE BOOTMAKER	D&G DOLCE&GABBANA
Austin							
Charlotte							
Columbus							
Dallas/Ft. Worth							
Indianapolis							
Kansas City							
Oklahoma City							

RETAIL GAP ANALYSIS: LIFESTYLE AND ENTERTAINMENT

With two major sports venues set to open in Downtown over the next two years, there is a strong opportunity to cultivate a year-round entertainment district. A destination anchor, such as a Live!-style concept, could meet demand on game days, concerts, and major events, while also driving consistent activity throughout the year

	Live!	MAIN EVENT	DAVE & BUSTER'S	Chicken N Pickle	iFLY	ANDRETTI	TOPGOLF
Austin							
Charlotte							
Columbus							
Dallas/Ft. Worth							
Indianapolis							
Kansas City							
Oklahoma City							

RETAIL GAP ANALYSIS: DINING AND GROCERY

Shake Shack's 2025 market entry along with expansions by Whole Foods and Trader Joe's, highlights the OKC metro's ability to support national concepts and scalable growth

	WHOLE FOODS MARKET	TRADER JOE'S	SHAKE SHACK	IN-N-OUT BURGER	THE CAPITAL GRILLE	NORTH ITALIA	The Cheesecake Factory
Austin							
Charlotte							
Columbus							
Dallas/Ft. Worth							
Indianapolis							
Kansas City							
Oklahoma City						ANNOUNCED	

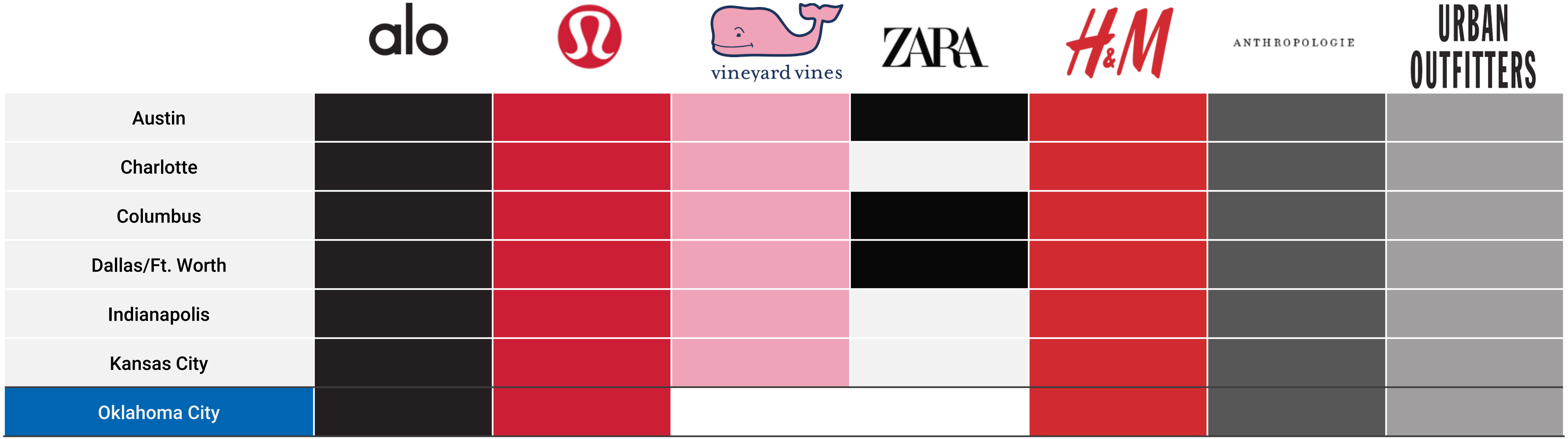
RETAIL GAP ANALYSIS: FURNITURE

The OKC MSA has decades-long local furniture anchors such as Mathis Home, and the market is gaining additional specialized and upscale entrants; however, large-format brands like IKEA have not yet arrived, unlike in peer metros

	IKEA	RH Restoration Hardware	ARHAUS	west elm	HermanMiller	LIVING SPACES	at home The Home & Holiday Superstore
Austin							
Charlotte							
Columbus							
Dallas/Ft. Worth							
Indianapolis							
Kansas City							
Oklahoma City							

RETAIL GAP ANALYSIS: CLOTHING AND ACCESSORIES

With entrants like Lululemon in 2013 and Alo in 2025, OKC is proving demand for national apparel brands, and creating a runway for additional fan-favorite retailers



SELECT NATIONAL BRANDS DOWNTOWN

SELECT REGIONAL AND OKLAHOMA-BASED BRANDS DOWNTOWN

VALLIANCE BANK

NEIGHBORHOOD JAM

BRICKTOWN BREWERY

Harkins THEATRES

SMITTY'S GARAGE burgers & beer

TRUCK YARD BREWS ★ GRUB ★ TUNES

Texadelphia THE ORIGINAL TEXAS CHEESESTEAK

HIDEAWAY PIZZA SINCE 1957

Hal Smith RESTAURANTS

Mahogany PRIME STEAKHOUSE

CHARLESTON'S RESTAURANT

A GOOD EGG DINING GROUP

TOBY KEITH'S I ♥ THIS BAR & GRILL

Mexican RADIO TACOS + COLD DRINKS

RED PRIMESTEAK

BARRIOS FINE MEXICAN DISHES

QuikPrint we're on it.

JIMMY B's CULINARY + KRAFTED

KITCHEN № 324

MAPS

Source(s): City of Oklahoma City, MAPS Economic Impact Study

INVESTING IN OUR CITY

MAPS (one-cent sales tax) continues pushing Oklahoma City to new heights

1993: MAPS I 54% voter approval

$350 Million

2001: MAPS for Kids 61% voter approval

$700 Million

2009: MAPS III 54% voter approval

$777 Million

2019: MAPS IV 71% voter approval

$1.1 Billion

Over 30 years, OKC voters have approved four MAPS programs totaling over $2.9 billion in public investment. Each program passed with strong voter support ranging from 54% to 71%. These debt-free, sales-tax-funded programs have transformed Downtown with world-class venues, parks, transit, and schools, generating a $7 billion economic impact and cementing OKC as a national model for civic reinvestment. MAPS IV, a $1.1 billion program approved by 71% of voters in 2019, is now underway and includes a new multipurpose stadium, transit improvements, and major quality-of-life investments.

Source(s): City of Oklahoma City, MAPS Economic Impact Study

MAPS4

ROBINSON PARK · DOWNTOWN OKLAHOMA CITY

ATTRACTIONS

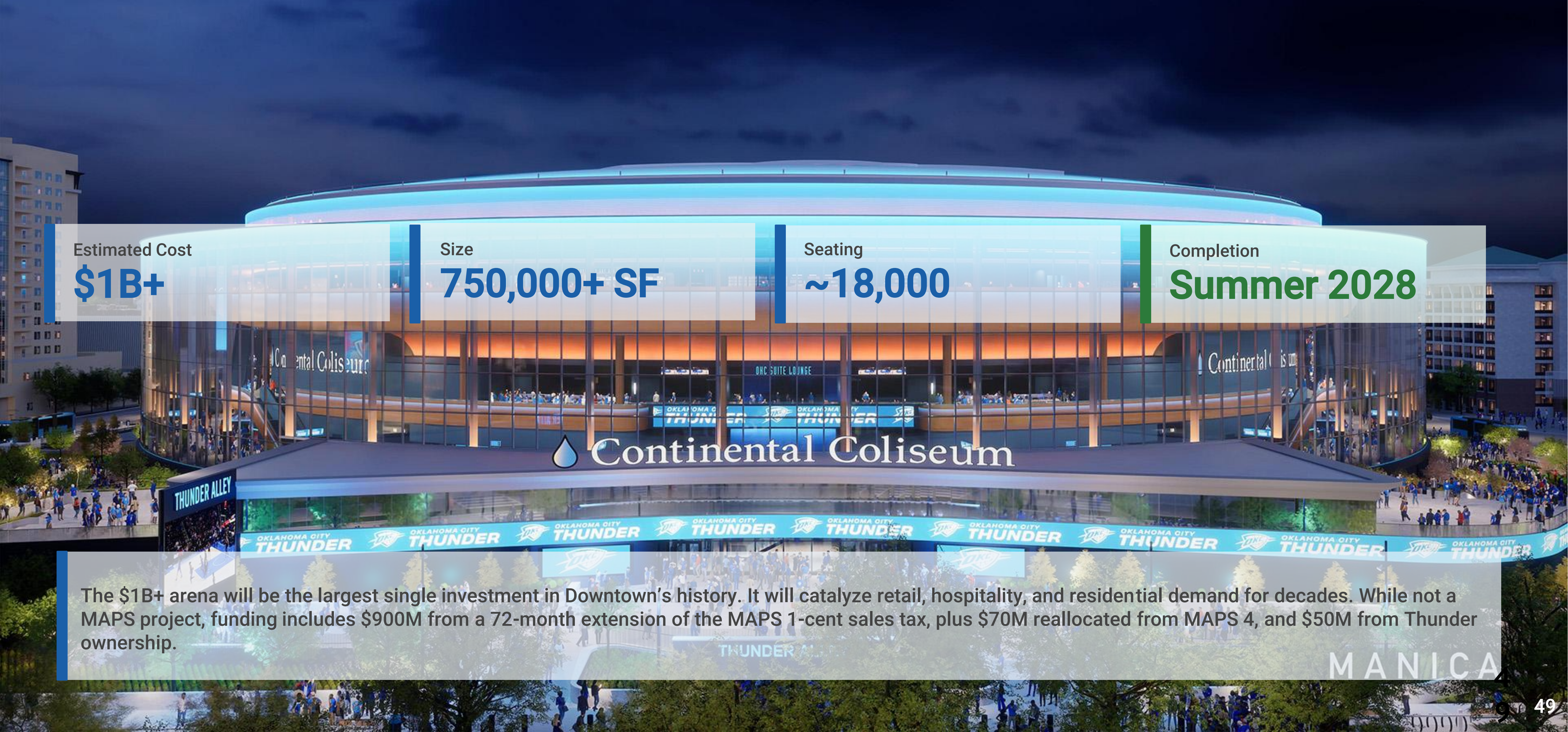






CONTINENTAL COLISEUM

Future Home of the NBA's Oklahoma City Thunder



Estimated Cost	Size	Seating	Completion
$1B+	**750,000+ SF**	**~18,000**	**Summer 2028**

The $1B+ arena will be the largest single investment in Downtown's history. It will catalyze retail, hospitality, and residential demand for decades. While not a MAPS project, funding includes $900M from a 72-month extension of the MAPS 1-cent sales tax, plus $70M reallocated from MAPS 4, and $50M from Thunder ownership.

MULTIPURPOSE STADIUM

New Downtown sports and events venue opening early 2028

Estimated Cost
$121 Million

Seating Capacity
10,000+

Completion
Early 2028

The 10,000+ capacity MAPS 4 Multipurpose Stadium will be home to OKC United, Oklahoma City's new professional soccer club, and a new United Football League franchise, both set to launch in 2028. The venue will anchor a planned $2.5 billion sports and entertainment district, driving foot traffic and hospitality demand beyond game days. MAPS 4 contributed $41 million toward the $121 million stadium, with additional funding from the 2025 OKC bond, TIF, and private investment.

ROBINSON PARK
RESEARCH & ANALYTICS

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