

# ARENA DISTRICT MASTER PLAN

ECONOMIC ASSESSMENT,  
IDENTITY ASSESSMENT,  
LAND USE ASSESSMENT,  
CONNECTIONS ASSESSMENT

## ASSESSMENT REPORT

JULY 3, 2018

**MKSK** HR&A **kolar**



**VISION**  
TULSA



**Tulsa** CITY OF  
A New Kind of Energy.



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# INTRODUCTION

## PURPOSE OF THIS DOCUMENT

This series of assessments catalogs the planning team's analysis and observations of existing conditions and presents a framework for preliminary concepts and strategies. We have been guided through this process by input from the Working Group, Steering Committee, stakeholders, and the general public.

There are four chapters:

**Economic Assessment** - Summarizes the findings and recommendations from the real estate market analysis.

**Identity Assessment** - Reviews the existing identity within the study area and surrounding downtown districts to provide a direction for the future positioning of the Arena District.

**Land Use Assessment** -Examines the existing land use conditions, highlights key opportunities and recommends future land uses to support a more active Arena District.

**Connections Assessment** - Evaluates the current pedestrian, vehicular and transit environment and suggests methods for improving district-level connectivity, walkability and multi-modality.

**BROADEN AND STRENGTHEN THE DISTRICT'S ROLE** in the Tulsa economy by identifying strategies to reinforce the visitor experience and promote and foster growth and development.



01 | ECONOMIC ASSESSMENT

**UNCOVER A DISTINCT DISTRICT AND DOWNTOWN IDENTITY** by telling a bold and authentic story through dynamic placemaking, landmarks, public art, and messaging.



02 | IDENTITY ASSESSMENT

**REPOSITION THE DISTRICT** from a limited-use area into a thriving destination and downtown neighborhood.



03 | LAND USE ASSESSMENT

**SHRINK PERCEIVED AND REAL DISTANCES** within and between the District and its downtown and riverfront neighborhoods for residents, workers, and visitors.

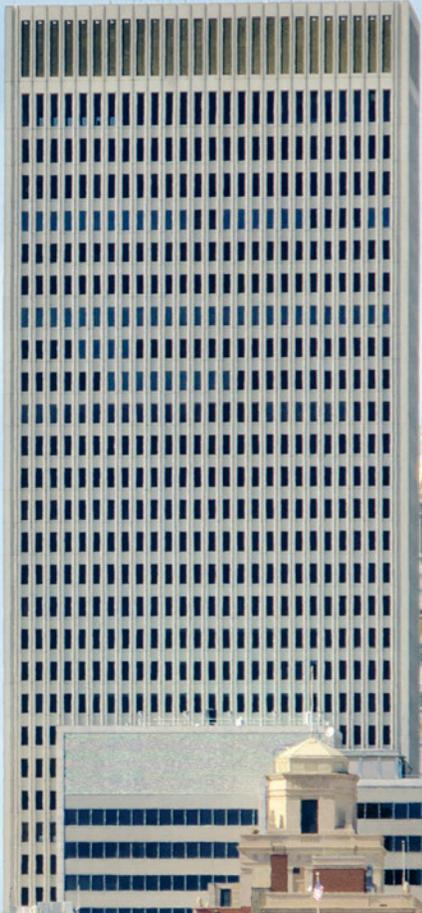


04 | CONNECTIONS ASSESSMENT

**CREATE AN ACTIONABLE PLAN** to guide public and private sector investment that leads to “early wins” and long-term prosperity.



05 | PRELIMINARY CONCEPTS & STRATEGIES ASSESSMENT



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# **001 | ECONOMIC ASSESSMENT**

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# EXECUTIVE SUMMARY

## PROCESS

The City of Tulsa engaged the MKSK team to develop a master plan for its downtown Arena District. The Arena District is an eclectic neighborhood within Downtown Tulsa that the City hopes to position as a vibrant entertainment district and mixed-use neighborhood. The District has experienced recent investments sparked by the passage of a public funding package – most notably the 19,000 seat multi-purpose arena the BOK Center – yet it faces structural barriers that prevent it from realizing the organic growth occurring in other downtown districts.

This market and economic assessment identifies demand drivers and offers guidance on the feasibility of different real estate uses within the Arena District, with a particular focus on retail opportunities. The assessment draws upon findings from a series of conversations with Downtown stakeholders including developers and retailers; evaluation of third party socioeconomic and real estate market data for Downtown Tulsa along with the city and region; and comparisons to market and economic trends in peer cities.

As the project moves forward into the Explore – Concepts & Strategies phase, HR&A will recommend the types of retail and entertainment tenants that can help the District develop a compelling niche and identity; evaluate development opportunities for catalytic sites; and produce an implementation strategy for activating the Arena District that both articulates potential funding sources for key initiatives and identifies the roles and responsibilities required to advance short- and long-term strategies.

## STUDY AREA

HR&A examined socioeconomic and market conditions at both the local and regional level to develop a contextual understanding of the competitiveness of Downtown Tulsa and the Arena District. The primary study area is Downtown Tulsa, defined to encompass the majority of the area within the Inner-Dispersal Loop (IDL). Select data is also collected for the Arena District. To frame market dynamics relevant to Downtown, our analysis also includes comparisons to the City and the Tulsa MSA.





# RESIDENTIAL + OFFICE FINDINGS

## RESIDENTIAL

**Population Growth:** Downtown Tulsa has grown at a slower rate than both the City and the MSA in recent years. Moreover, counter to trends in many American cities the millennial cohort in Downtown Tulsa is growing slower than in the broader City and MSA slower growth rate compared to the City and MSA. These trends highlight that for many potential residents, the current value proposition of downtown living does not justify the higher cost.

**Rental Market:** The rental market in Downtown Tulsa is enjoying moderate growth, led by adaptive re-use and conversion opportunities. While Tulsa had limited downtown multifamily rental stock prior to 2012, the multifamily growth rate of 67% in the past decade is aligned with growth rates in peer cities. The pipeline is even more robust with nearly 1,000 units proposed or under construction, indicating Downtown may be reaching an inflection point in its trajectory.

**Arena District Opportunity:** The strategic provision of multifamily residential units in the Arena District could provide a key activating element for the district. While residential development requires subsidy to pencil, the value that multifamily housing brings, namely new residents and rooftop space, is vital to the success of retail and overall district vitality. Offering smaller units that are more affordable is an important strategy for providing urban living options at price points that are attainable for would-be Downtown residents including young workers in entry-level jobs and workers in the service-sector. Developers indicate that providing workforce housing should be a top priority for further revitalizing Downtown Tulsa.

## OFFICE

**Jobs:** Job growth is a fundamental indicator of the potential for future office development, and jobs are growing at a slower pace in the State of Oklahoma and the Tulsa MSA compared to the United States. Jobs in Downtown have similarly grown at a slower pace than the nation, but recently have fared well compared to the State and MSA. Employment in Downtown Tulsa is concentrated in knowledge industries with a base of high paying jobs, mostly in energy-related fields.

**Market Performance:** The Downtown Tulsa office market has been oversupplied, leading to limited growth over the last decade. These conditions are similar to many of Tulsa's peers, which have also generally experienced less office development relative to residential development. Since 2009, five office buildings comprising 3% of Downtown's total office space were delivered, with four buildings having converted to other uses. In addition, rents in Downtown Tulsa do not command a premium over suburban locations, where new construction does not necessarily require structured parking.

**Arena District Opportunity:** Office development likely represents a longer term opportunity for incorporation into the Arena District, after the District's mixed-use character and amenity base are established.

# HOTEL + RETAIL FINDINGS

## HOTEL

**Stagnant Market:** Ten hotels containing nearly 1,850 rooms are located in Downtown Tulsa. Approximately 40% of these rooms came online over the past 10 years. Despite this pace of new hotel room deliveries, there has been minimal growth in room nights sold since 2014. In addition, revenue per available room (RevPAR) has flattened out while the occupancy rate has declined over the past few years. While these indicators suggest that the market is oversupplied, six new projects are in the pipeline.

### **Abundance of Select Service Hotels:**

Downtown Tulsa has a large presence of select service hotels that have catered to an event-driven market. Given this robust existing supply and four additional select service properties in the pipeline, the market is likely saturated for this product type. Future hotel offerings that should be explored should include alternative products that are currently lacking in the market, such as full-service hotels or a convention center hotel.

**Arena District Opportunity:** One missing product to earnestly consider is a large convention center hotel. As experienced in other cities, convention center hotels have the capacity to revitalize a market and spur development if there is a business case to grow convention and meeting booking in tandem. The experience of other markets indicates that a compelling urban environment is key to the success of convention centers and hotels, so significant investments in place-making efforts will be critical to facilitate success around such an offering in the Arena District.

## RETAIL

**Existing and Proposed Retail:** Existing inventory in Downtown Tulsa is clustered in a few emerging restaurant and nightlife districts, including the Blue Dome, Arts, and Greenwood Districts. Innovative and funky retail, such as The Boxyard, which opened in 2016 and utilizes a new model of small retail floorplates in cool space, has begun to catalyze the return of retail to downtown with the introduction of hard and soft goods. The proposed Santa Fe Square project and grocery store should further help enhance retail in Downtown, and create a walkable retail experience.

**Retail Needs:** There is no concentrated shopping district in Downtown Tulsa, and national and regional chains are concentrated in shopping centers and districts in South Tulsa. Further, there is a lack of convenience services for Downtown residents, workers, and visitors. To date, the density of rooftops and activity in Downtown Tulsa has not justified a more significant retail presence.

**Arena District Opportunity:** Retail space in the Arena District could distinguish itself from other Downtown retail clusters by providing a collection of convenience retail offerings meeting basic everyday needs along with a food and beverage component potentially including a food hall.

## PEER CITIES ANALYSIS

To further contextualize socioeconomic and real estate trends relevant to Downtown Tulsa, our analysis includes comparisons to a set of peer cities, which are aspirational in the sense that each is located in a metropolitan area larger than the Tulsa region. These cities provide a benchmark against which to measure Tulsa's existing conditions, and key metrics in Tulsa are compared to this peer city group throughout the briefing book to better understand Tulsa's competitive positioning and provide context for Tulsa's ongoing Downtown revitalization.





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# RESIDENTIAL

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## POPULATION GROWTH

Downtown Tulsa's population is growing at a somewhat slower rate than both the City and the MSA. Since 2010, the population has grown by 6%, equivalent to a 0.86% annual growth rate, placing Downtown on par with the United States as a whole. According to 2017 population estimates from ESRI Business Analyst, 4,200 residents live Downtown compared to 420,000 in the City and over one million in the MSA. The Arena District, by virtue of having a lower initial base population and absorbing two new residential projects since 2010, grew at the fastest rate of any of the studied geographies at 13%. The Arena District comprises 25% of Downtown's population with just over 1,000 residents.

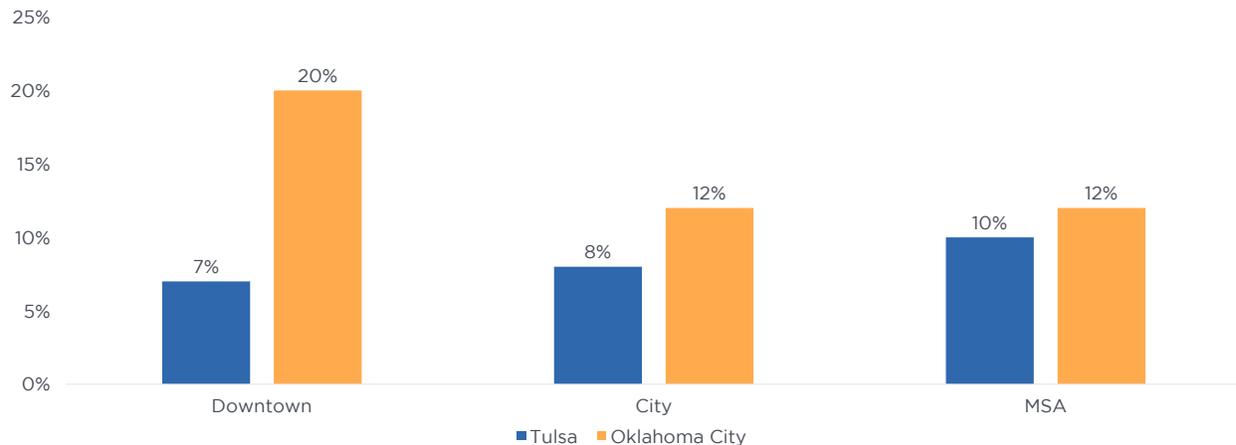
## YOUNG ADULT POPULATION GROWTH

The young professional cohort has similarly grown at a slower rate in Downtown Tulsa than in both the City and the MSA, which contrasts with growth trends seen in Oklahoma City - a city that is undergoing recent Downtown activation. Conversations with developers highlight that for many potential residents, the current amenity base in Downtown Tulsa is insufficient to justify the "urban premium" on cost of living downtown compared to the suburbs. These findings indicate that while Downtown Tulsa is growing, it has not reached its full potential as a residential destination for cohorts that are typically drawn to downtown living options.

### 2010-2017 Population Growth Rate



### 2010-2017 Young Professional Cohort (Age 25-34)

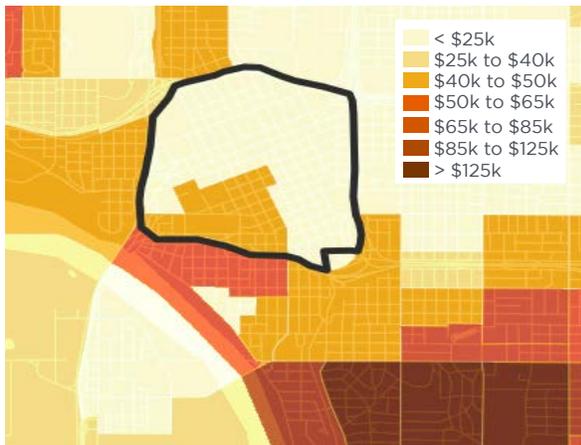


Source: ESRI

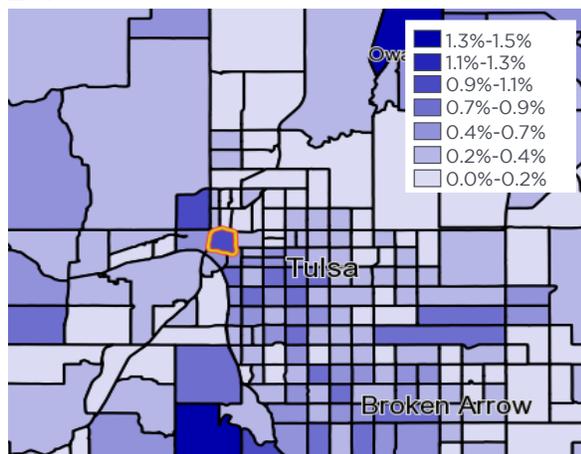
## MEDIAN INCOME

Higher-income areas in Tulsa are concentrated south of Downtown. The median household income in Downtown Tulsa is only \$35,000, substantially lower than the nation's median household income of approximately \$60,000, and also lower than the City's median household income of \$43,000. Just south of Downtown, the median household income jumps to over \$50,000, rising up to \$160,000 in the Maple Ridge, Woodward Park, and Bryn Mawr neighborhoods. The per capita income in Downtown Tulsa is approximately \$28,700, close to the City's overall per capita income of \$29,200. This smaller disparity in per capita incomes reflects that the majority of households in Downtown Tulsa are one person households, in contrast to the City as a whole.

Median Household Income, 2016



Where Downtown Tulsa Employees Live, 2015



Source: U.S. Census Bureau, Longitudinal Household-Employer Dynamics

## WHERE DOWNTOWN EMPLOYEES LIVE

Few employees working Downtown also live there, indicating a need to enhance Downtown as an appealing residential destination. Downtown Tulsa has a daytime worker population of nearly 28,000 people employed in the area, yet only 1% of these employees (approximately 300 people) reside within the area. The plurality of workers commute from the City of Tulsa (43% of employees) with 10% coming from Broken Arrow. The remaining 47% of employees commute from across the region and beyond.

**\$35K**

Median Household Income in Downtown Tulsa

**\$43K**

Median Household Income in the City of Tulsa

**Up to \$160K**

Median Household Income in South Tulsa

**27,500+**

Jobs in Downtown Tulsa

**1%**

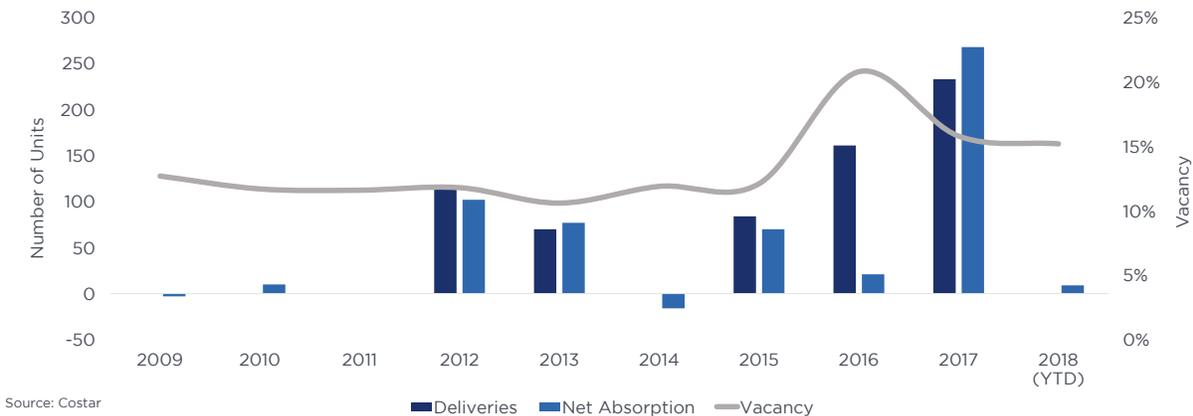
of Downtown Tulsa's 27,500 employees also live Downtown

# MARKET OVERVIEW

Prior to 2012, Downtown Tulsa did not have a significant stock of multifamily residential product, with only about 990 units Downtown. Since then, the market has delivered 665 units to this small base of existing housing, growing steadily to nearly 1,650 units in 37 buildings. Not all of this new product has been fully absorbed

though. As a result, the vacancy rate has increased to around 15% for the past two years, a further indication that Downtown has not reached its full potential as a living destination. Developers have shared that this finding is the result of Downtown's relatively high cost of living that is prohibitive for some would-be-residents.

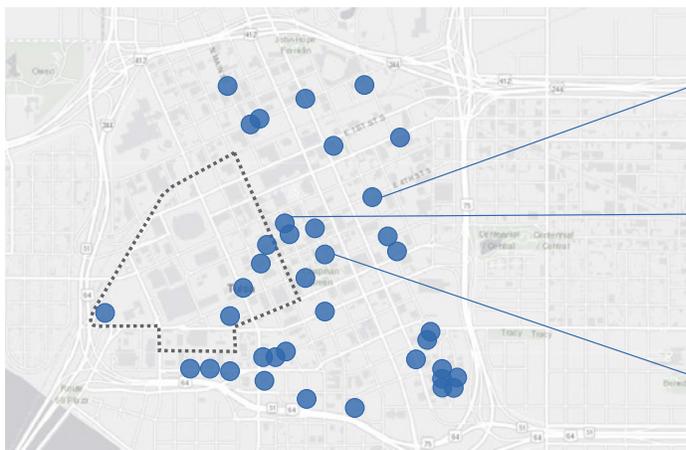
## Multifamily Activity, All Classes



# RENTAL OVERVIEW: DOWNTOWN

Most of the recently delivered apartment buildings in Downtown Tulsa are the result of adaptive reuse rather than new-build, ground-up development. Moving forward, this dynamic may shift as developers indicate that there are fewer remaining opportunities for conversions. For the most competitive product, multifamily rents tend to range between \$1.30 to \$1.70 per square foot, but can go as low as under \$1.00 per square foot, even for recently

delivered product. Smaller units offered at lower price points are in especially high demand, as they can be affordable to a single person working on an entry or mid-level salary. Yet even at the higher end of this rent range, rents can be insufficient for the financial feasibility of new ground-up residential product in Downtown Tulsa given rising construction costs, and many of these projects have required subsidy in order to move forward.



**Edge - East Village (2016)**  
161 Units, Avg. Rent - \$1.70 PSF

**Palace Building Apts. (2017, renovation)**  
60 Units, Avg. Rent - \$1.52 PSF

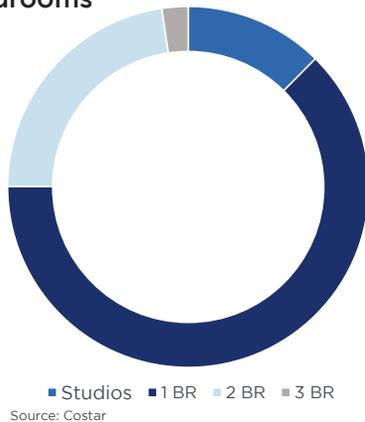
**The Meridia (2017, renovation)**  
93 Units, Avg. Rent - \$1.65 PSF

Source: Costar, Apartments.com, Tulsa World, Trulia

There is a clear dominance of one and two bedroom units in Downtown Tulsa, with studios that cater to non-family populations increasing as part of proportion of recent development projects. Only two of the recent eight deliveries for which data was available had any three bedroom units (Y Lofts and The Meridia). The average square footage of units in Downtown multifamily projects is trending downwards, with all projects since 2015 delivering units at an

average of less than 1,000 square feet. These smaller units come at a more affordable price point for residents and can help improve the feasibility of projects by accelerating lease-up. For instance, the reported asking rents for studios and one-bedrooms at the Palace Building are \$935 to \$950 per month, price points that are more palatable for many renters seeking a Downtown living experience. The project reports having no vacant units.

### Multifamily Inventory by Number of Bedrooms



	Total Units	Avg Unit (SF)	Studio	1BR	2BR	3BR
Riverbend Gardens (2012)	40	1,129 SF	0%	0%	100%	0%
Metro @ Brady Arts (2012)	75	1,039 SF	0%	47%	53%	0%
GreenArch Apts (2013)	70	1,018 SF	29%	17%	54%	0%
Edge - East Village (2015)	161	887 SF	0%	80%	20%	0%
The Meridia (2017)	93	909 SF	0%	83%	9%	8%
Y Lofts (2017)	79	993 SF	0%	25%	51%	24%
Palace Building (2017)	60	669 SF	30%	57%	13%	0%
Flats on Archer (2018)	62	939 SF	0%	71%	29%	0%

## RENTAL OVERVIEW: ARENA DISTRICT

The renovation of The Mayo Hotel into a luxury hotel and apartment complex in 2009 kickstarted the revitalization of the residential market in the Arena District, which currently includes 364 multifamily rental units across 5 buildings. Since 2012, two additional residential conversions have come online adding 97 units at an average price of \$1.10 PSF, a rate that is lower than

other renovated buildings in Downtown. Prior to these recent additions, there was no new construction since 1992 and the overall multifamily market in the Arena District remains limited with the assisted senior living facility in the Southwest corner of the District housing nearly half of all units.

**The Y Lofts**  
79 Units (2017) - Reno.  
Avg. Rent \$1.20 PSF

**The Irving Building**  
18 Units (2012) - Reno.  
Avg. Rent - \$0.64 PSF

**Blair Apartments**  
40 Units (1992) - Reno.  
Avg. Rent - \$0.84 PSF

**The Mayo Residences**  
77 Units (2009) - Reno.  
Avg. Rent - \$1.43 PSF

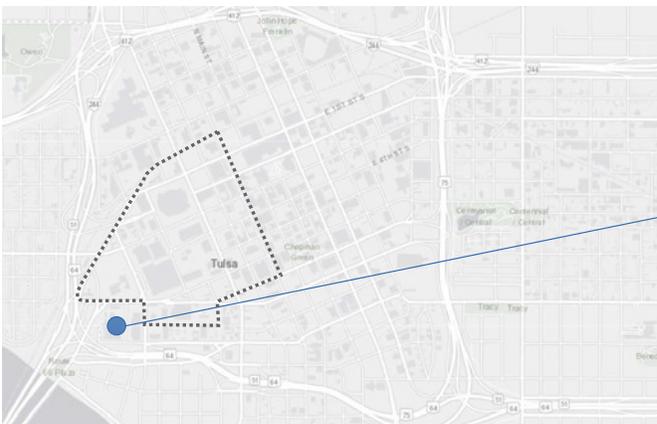
**Hewgley Terrace**  
150 Units (1970)  
Assisted Senior Living

Source: Costar, Tulsa World, Mayo Residences, Apartments.com

# MEDICAL CENTER HOUSING OPPORTUNITY

There could be an opportunity to deliver a residential product in the Arena District to meet the needs of the residents and fellows at Oklahoma State University (OSU) Medical Center, which is located just south of the District. There are 11 residency programs and 9 fellowship programs at OSU Medical Center that train more than 150 residents on an annual basis. These types of tenants tend to prefer to live close to where they work to cut down on

their commute time given their constantly fluctuating schedules with early mornings and late nights. There are many examples of multifamily projects around the country that have intentionally located adjacent to teaching hospitals, which market and price their units to attract students, residents, and fellows. One example is Trinity Commons in Durham, North Carolina, which delivered top-of-market units across the street from Duke University Hospital.



# CONDO OVERVIEW: DOWNTOWN

The condo market in Downtown Tulsa is small in comparison to the rental market with only two existing developments. Tulsa's first condo complex, located in the Arena District, offers over 400 units ranging from studio to two-bedroom units with sales prices - \$50,000 for a studio up to \$126,000 for a two-bedroom unit - in line with the Tulsa-wide

median home value. The newer condo development (Urban8 Condos) is angling toward attracting families by providing 3-bedroom units, a product type previously nonexistent in Downtown Tulsa, but sales have been slow and prices were dropped from \$900,000 for the four story, three-bedroom fully-customizable townhome to as low as \$650,000.



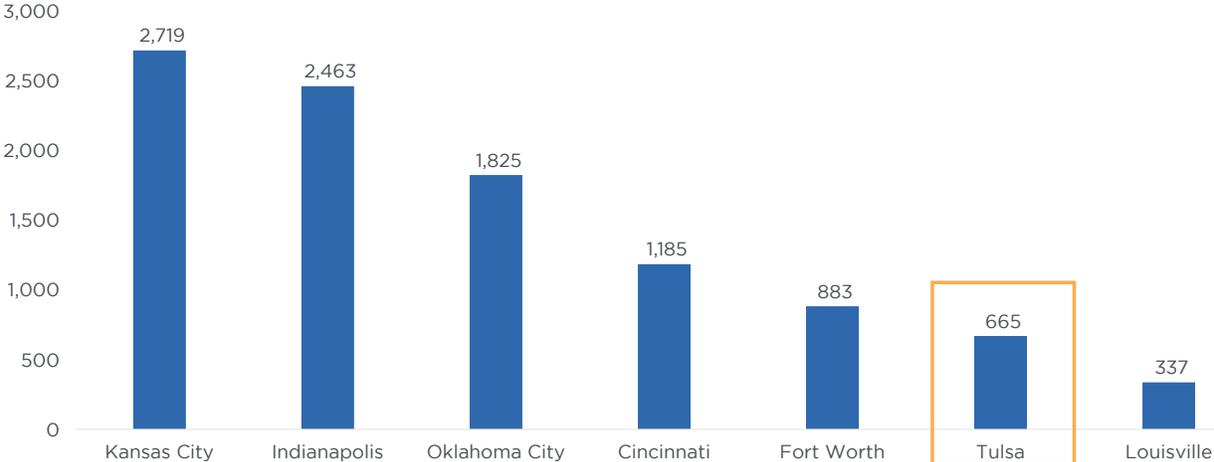
# PEER CITY MULTIFAMILY DELIVERIES

Downtown Tulsa’s multifamily market lags behind most of its larger peers in terms of nominal deliveries in the past decade. Tulsa has delivered more units than only Downtown Louisville, and its 665 delivered units are less than 30% of the total number of units delivered in Downtown Kansas City (2,719) and Downtown Indianapolis (2,463). Tulsa also trails nearby Oklahoma City, delivering only about a third of the product that Downtown Oklahoma City has brought online within the past 10 years (1,825 units).

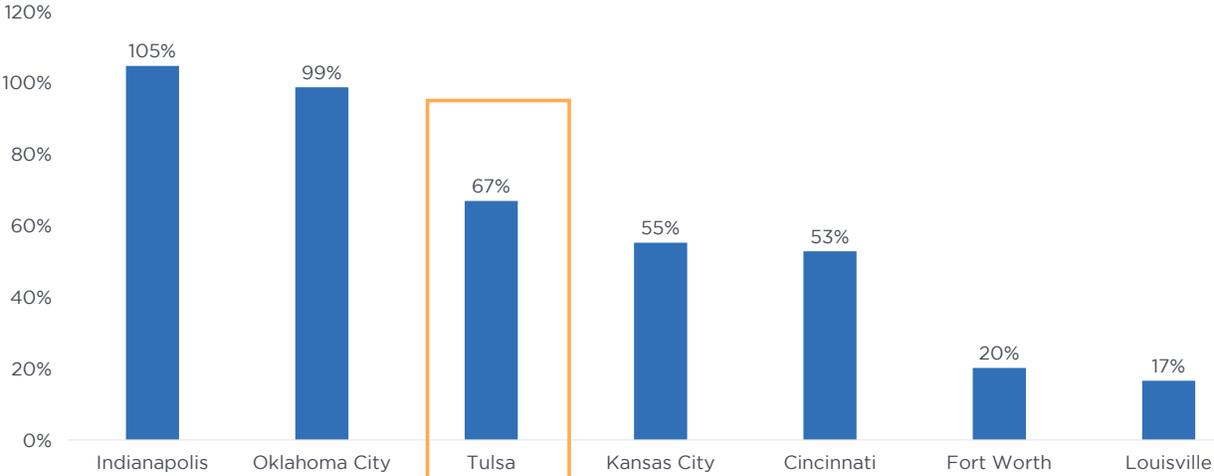
stock was low relative to the other downtowns prior to 2009. Downtown Tulsa’s multifamily stock has grown 67% over the past decade, a percentage higher than all peers except Downtown Indianapolis and Downtown Oklahoma City. This growth has enabled Downtown Tulsa’s housing stock to reach nearly 1,650 units, a number that is generally less than half of the number of downtown multifamily units across Tulsa’s peer cities, highlighting that Tulsa has the potential to absorb more residential product as Downtown Tulsa becomes more amenity-rich.

Deliveries in Downtown Tulsa, however, represent a significant percentage increase for Tulsa since its base downtown housing

**Multifamily Deliveries (Units), 2009-2018**



**Multifamily Deliveries (Percent Growth), 2009-2018**



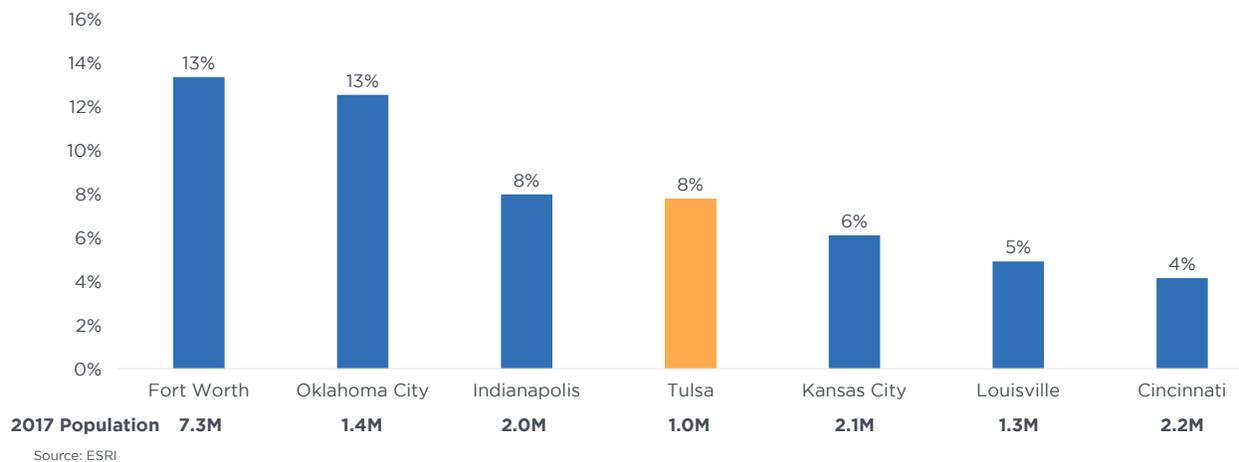
Source: Costar

## PEER CITY REGIONAL POPULATION GROWTH

While the Tulsa MSA is not the fastest growing MSA among its peers, it is keeping pace with many, growing by 8% since 2010. The fact that many of these aspirational cities have experienced only moderate overall regional growth, but substantial

recent downtown multifamily deliveries, highlights that a city such as Tulsa with similar moderate regional growth can support additional downtown investment with the right strategies and tools to grow population.

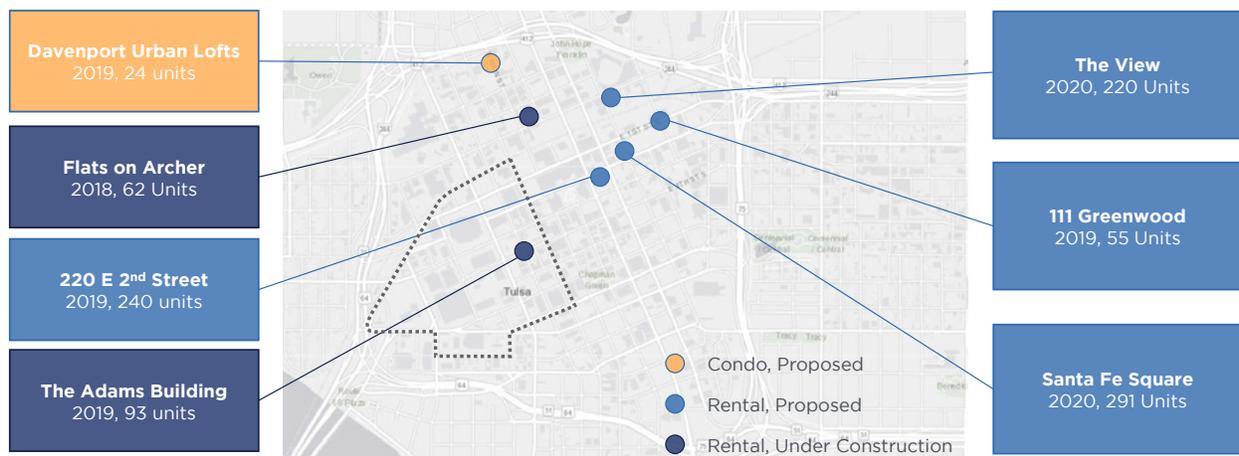
### 2010-2017 Population Growth by MSA



## PIPELINE

The recent residential growth in Downtown Tulsa is expected to continue with six new residential developments in the pipeline, totaling 985 units. Should all of these products deliver, Downtown Tulsa's multifamily inventory would increase by 67%. One new project is slated to deliver within the Arena District: The

Adams Building renovation, which will introduce 93 new units in 2019. The delivery of the full pipeline may saturate the Downtown market in the near term, but these deliveries will help build further critical mass and add crucial rooftops that can support additional retail in the intermediate-term.



## PROJECTED POPULATION GROWTH

The Tulsa MSA is expected to grow by 11% between 2018 and 2030. Should Downtown Tulsa grow at the same rate, Downtown would expect to add approximately 450 residents by 2030 as 4,226 residents currently live Downtown. Based on just the pipeline of 985 units slated to come online Downtown in the next few years, Downtown is positioned to grow by much more than its fair share of 11%. If 1.5 people were to live in each unit, the IDL would see an addition of nearly 1,500 residents, highlighting a potential inflection point in Downtown's trajectory.

# +110K

Projected increase in population in Tulsa MSA (2018-2030)

# 985

Residential units in the Downtown pipeline

# 450

Projected new Downtown residents by 2030 based on Downtown capturing a consistent share of MSA population

# 1,477

Projected new Downtown residents associated with multifamily pipeline\*

Source: Oklahoma Department of Commerce - "Oklahoma State and County Population Projections Through 2075" (2012)  
\* Assumes 1.5 people per unit

# RESIDENTIAL KEY FINDINGS & IMPLICATIONS

## LIMITED POPULATION GROWTH

Recently, Downtown Tulsa’s population has grown at a slower rate than the City and MSA, but Downtown was starting from a very low population basis. Downtown Tulsa’s rate of multifamily apartment growth has been comparable to aspirational peer cities.



The City should focus on adding general amenities for urban living and further improving perceptions of safety in Downtown Tulsa to attract potential new residents. Subsidies for workforce housing, which could be located in the Arena District as an activating element, should also be considered.

## ROBUST PIPELINE

Over 900 residential units are slated to come online within the next few years, which could help substantially increase the population of Downtown Tulsa.



These deliveries will help build further critical mass and add rooftops that can support additional retail. Future residential in the Arena District could be timed to deliver after the majority of this pipeline so as to avoid direct competition and allow for place-making investments and amenities to be put in place.

## FOCUS ON ADAPTIVE REUSE

Most multifamily development has occurred as a result of conversions of historic stock as opposed to ground-up development, but there are dwindling opportunities for conversions.



Developers indicate that it is difficult to make ground-up development financially feasible at currently achievable rents of \$1.70 per square foot on the high end. Delivering smaller unit typologies in addition to providing targeted subsidies will likely be required to catalyze new multifamily development in the Arena District.

## LIMITED FOR-SALE DEVELOPMENT

Condo construction has been limited to date in Downtown Tulsa, with only one small project in recent years.



The development of for-sale products that are currently scarce within Downtown Tulsa, like townhomes, should be considered in appropriate locations in the Arena District as the market continues to mature.



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# OFFICE

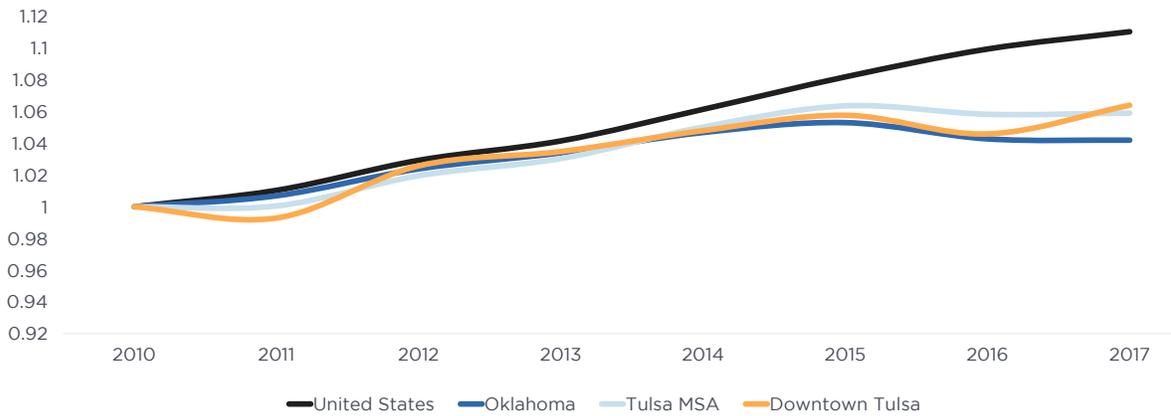
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# JOB GROWTH

Job growth is a fundamental indicator of the potential for future commercial development, and jobs are growing at a slower pace in the State of Oklahoma and the Tulsa MSA compared to the United States. Overall US job growth has increased 11% since 2010, while it has only

increased 6% in the Tulsa MSA and 4% in the State of Oklahoma. Jobs in Downtown have similarly grown at a slower pace than the nation, but recently have fared well compared to the State and MSA, experiencing an uptick in jobs in 2017.

## Job Growth Indexed to 2010 Employment Levels, 2010-2017

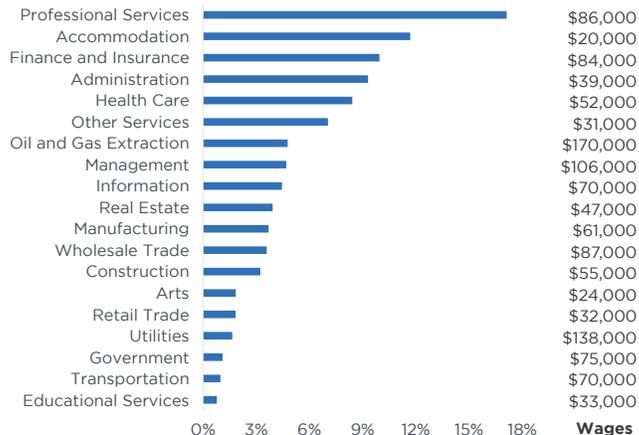


# DOWNTOWN EMPLOYMENT COMPOSITION

Employment in Downtown Tulsa is concentrated in knowledge industries with high average wages, such as Professional Services with an average income of \$86,000 and Finance and Insurance with an average income of \$84,000. While knowledge industries comprise a large

share of total employment, energy-related industries are the highest paying, with average wages of upwards of \$170,000. Employees in these sectors represent significant retail spending potential in addition to future targets for downtown residential product.

## Employment Share Industry (2017)



**27,500+**

Jobs in Downtown Tulsa

**42%**

of Downtown workers are in industries with average annual salaries of \$80K+

**0.89%**

annual job growth rate in Downtown Tulsa

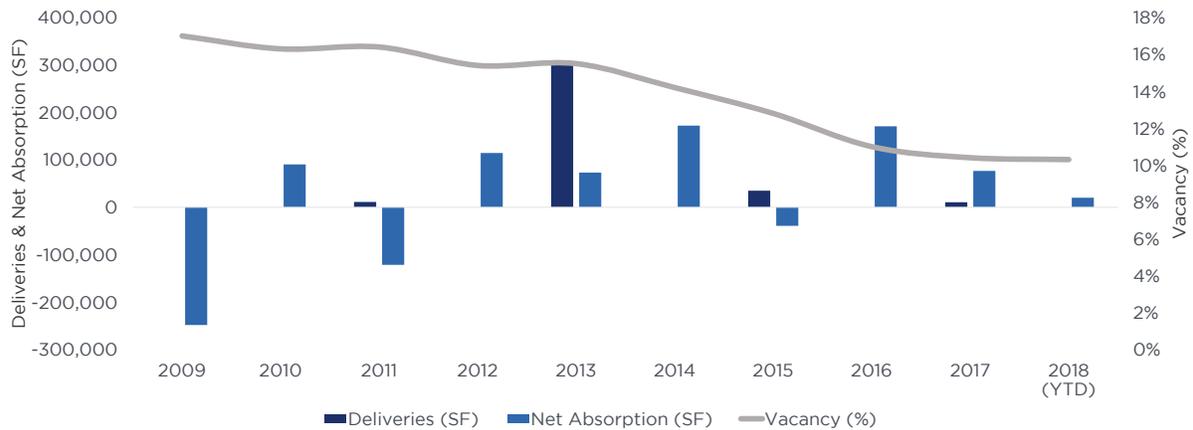
Source: ESRI

# MARKET OVERVIEW

The Downtown Tulsa office market has been oversupplied, leading to limited growth over the last decade. Since 2009, five office buildings comprising 3% of Downtown's total office space were delivered, with the majority of space coming online in 2013 with 300,000 square feet at One Place Tower. During the same

time, four office buildings were converted to other uses. As the new space was absorbed and other space was taken offline, vacancy fell from its high of 17.0% in 2009 to a stabilized rate of 10.5%. This rate, however, is still fairly high and indicates limited opportunities for new speculative office product.

## Office Activity, All Classes

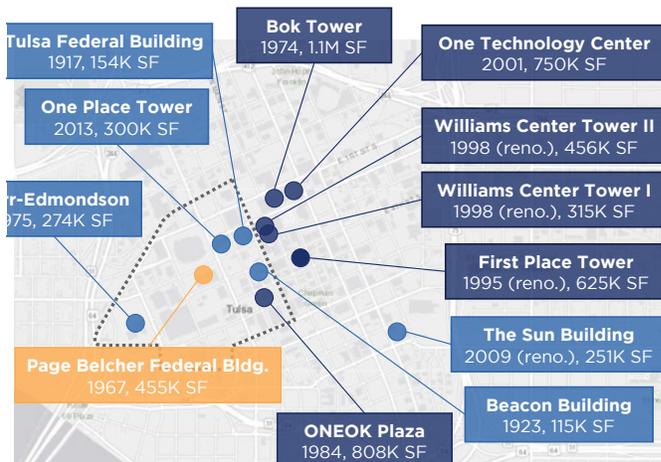


Source: Costar

# DOWNTOWN SNAPSHOT

The Downtown skyline is dominated by high-rise office buildings punctuated by the 52-story BOK Tower. Downtown Tulsa has nearly 13 million square feet of office space, although less than half of this space is comprised of Class A product. Most of these buildings were delivered between 1950-1980 with some undergoing renovations over the past

two decades. Rents range from \$15-\$19 PSF for Class A and B spaces with newer deliveries commanding the highest rents. Unlike the majority of Downtown with large skyscrapers, the Arena District is dominated by lower-scale public office buildings, such as the Page Belcher Federal Building.



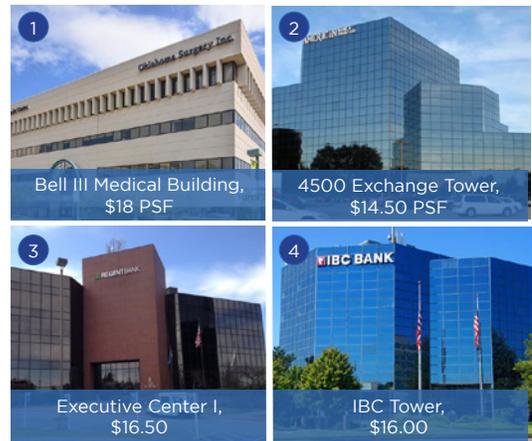
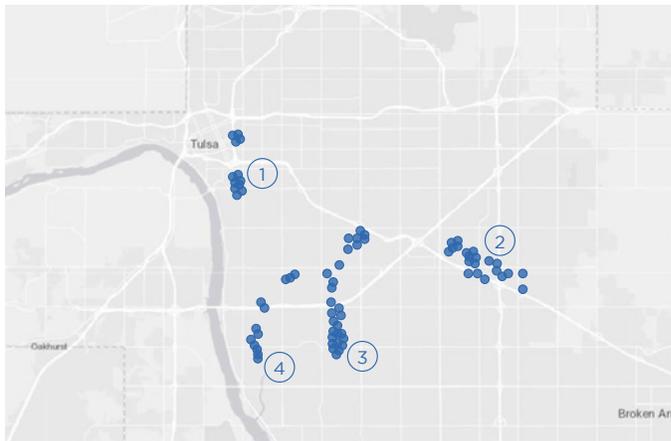
Source: Costar



# MARKET OVERVIEW: SOUTH TULSA

While Downtown Tulsa offers an urban setting for companies, there are suburban office nodes accessibly located along major thoroughfares, primarily south of Downtown close to the City's highest income residential areas. These office nodes range from medical campuses to medium-

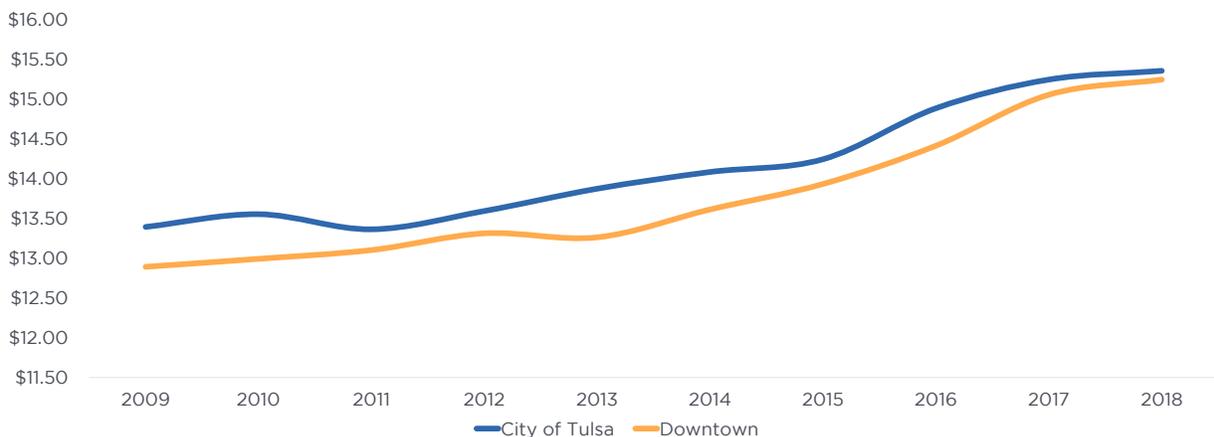
scale office parks and contain mostly Class B and C buildings. Competitive buildings in these submarkets achieve rents in line with Downtown Tulsa, indicating that South Tulsa's office market is just as strong as Downtown's market.



## RENTS

Further highlighting the competitiveness of non-Downtown office districts, office rents in the City of Tulsa as a whole have been greater on a per square foot basis than in Downtown Tulsa every year since 2009, although Downtown has some of the highest quality buildings in the MSA. This finding demonstrates that there is no general "urban premium" for office space

in Downtown, as office nodes outside of Downtown offer excellent access to wealthy suburban neighborhoods. Moreover, the value of a Downtown location is diminished by the need to also pay for parking at many buildings. Parking comes at an additional expense that typically ranges between \$75-\$125 per space per month.



Source: Costar

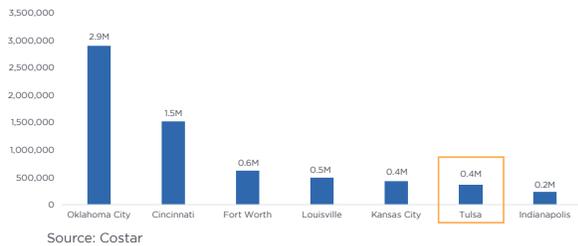
# PEER CITY OFFICE DELIVERIES & COMPARISON

Tulsa and many of its peer cities have experienced moderate downtown commercial deliveries in recent years. Four peer cities in addition to Tulsa have delivered less than 1M square feet in nominal office space in their downtowns, with only Oklahoma City and Cincinnati delivering greater than 1M square feet. This finding reflects that the recovery of the office market has generally been slower than the downtown residential market in many cities coming out of the Great Recession.

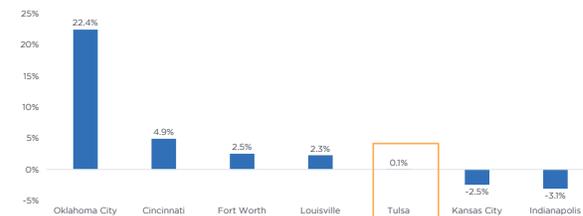
This sluggish pace of office delivery has resulted in single-digit or negative growth

in office space in the past decade in each peer city except for Oklahoma City. Kansas City and Indianapolis experienced negative growth indicating that while new office space came online over the past 10 years, other space was demolished or converted. Tulsa has experienced almost no growth in the office market when factoring in the conversion of space. These findings, juxtaposed against the strong growth of the multifamily residential market in the majority of these peer cities, highlight the critical role that adding residents and amenities has played in spurring downtown revitalization nationwide in the past decade.

**Office Deliveries (SF), 2009-2018**



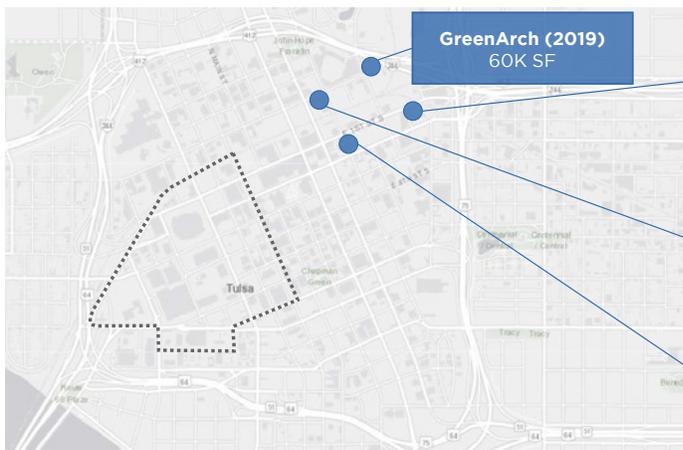
**Office Deliveries (Percent Growth), 2009-2018**



## PIPELINE

As a result of the stagnant market, there are limited pipeline commercial developments in Downtown Tulsa, all located in the Greenwood or Blue Dome Districts. These projects are moving forward only after anchor tenants are secured, and some, such as Ross Group’s development on Lot 44, are able to achieve pricing significantly

above prevailing market rents due to amenities like ballpark views and brand new space. Other pipeline projects, however, like the office component of Santa Fe Square are on hold as potential deals for office tenants have fallen through and new anchor tenants must be secured before proceeding with construction.



Source: Costar



# OFFICE KEY FINDINGS & IMPLICATIONS

## OVERSUPPLIED MARKET

Downtown Tulsa’s office market has been oversupplied for much of the past decade. Moderate absorption and conversion of space has helped to bring down vacancy, although it still remains above 10.5%.



Future office development will likely require committed anchor tenants and/or a stronger emphasis on new product types, such as entrepreneurial and co-working spaces that add a new dimension to the downtown offering and are aligned with nationwide trends towards flexible space for both established and nascent companies.

## LOW PREVAILING RENTS

Downtown Tulsa has not commanded higher office rents than South Tulsa, and currently prevailing market rents in the high teens to low twenties per square foot are not at a level that would justify new construction.



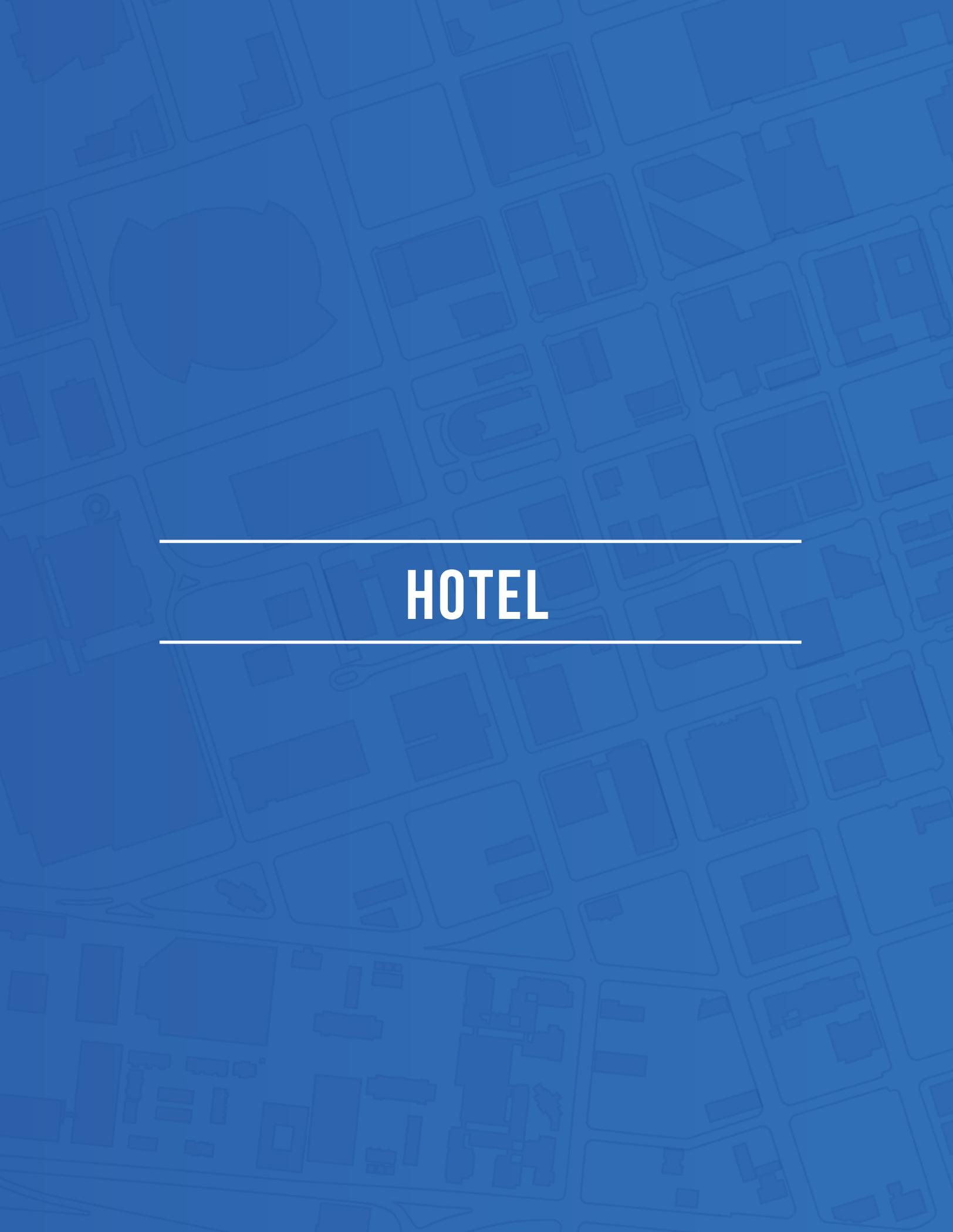
The City would likely need to subsidize new office development in the Arena District in order to make it feasible for a developer to undertake in the near-to intermediate-term.

## PREMIUM FOR MIX OF USES & AMENITIES

The amenity-rich Greenwood and Blue Dome districts are the only Downtown districts with an office pipeline, with anticipated rents for new product significantly above market averages for Downtown.



Office uses likely represent a longer-term opportunity for the Arena District as it becomes a mixed-use destination with amenities. Growing the number of visitors likely represents a stronger opportunity to build a day-time population in the District in the short-term.



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**HOTEL**

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# TOTAL DOWNTOWN REVENUE & DEMAND

Hotel rooms sold have increased by 41% since 2012. The biggest jump (nearly 90% of this increase) took place between 2012-2014 in parallel with delivery of the Fairfield Inn, Aloft and Hampton Inn, with hotel rooms sold increasing from 288,000 in 2012 to 393,000 in 2014. This trend indicates that unmet demand that existed at the time of the delivery of these hotels was absorbed. Since then, there has been minimal growth in room nights sold, despite the addition of the Best Western, with room nights sold only jumping to 406,000 by 2017.

Similarly, revenue per available room (RevPAR) has increased by nearly 30%

since 2012, but the majority of this increase happened between 2012-2014. Since then, RevPar has grown only 5%. Belying this trend, occupancy increased each year from 2012-2014, but has since declined, falling to 61% in 2017. Average Daily Rate (ADR) has increased each year since 2012, which prevented the erosion of RevPAR as occupancy began to decline in 2015. The falling occupancy rate in particular indicates that the market is becoming saturated, which has been confirmed by existing hoteliers who fear that any new project will continue to cannibalize the existing market absent the addition of significant new demand drivers.

**Total Downtown Demand (Room Nights Sold)**



Source: STR

**Year-Over-Year Comparison, Downtown RevPAR & Occupancy Rate**



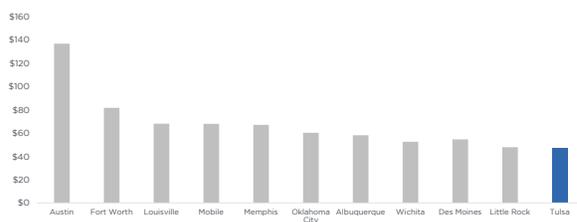
Source: STR

# PEER MARKET COMPARISON

Tulsa’s overall hotel market also lags behind Visit Tulsa’s peer cities in terms of RevPAR. These cities contain some overlap with the aspirational peer set identified by the City. According to Crossroads Consulting Services, these cities all have convention centers that typically compete with Tulsa for conventions, tradeshow, and meetings. Compared to these cities, Tulsa’s market-wide (as opposed to just Downtown) hotel market ranks last in terms of RevPAR for the most recent month at

\$46.67, well below the average of \$69.33 for the peer set. Tulsa ranks last in terms of ADR at \$78.19 and third to last in terms of occupancy with a rate of 59.7%, indicating a relative lack of strength in the Tulsa hotel market.

**Market-Wide RevPAR, March 2018**

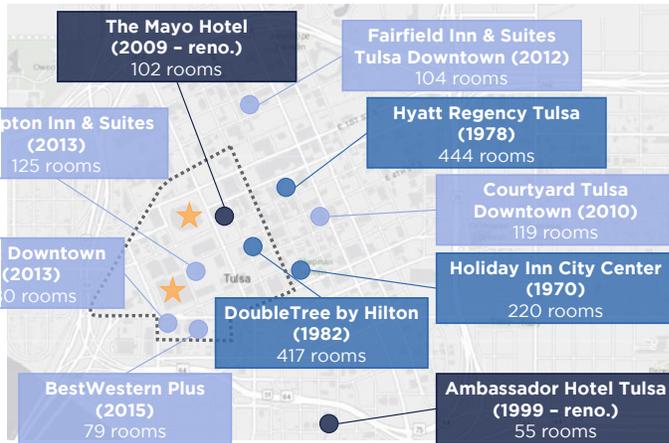


Source: STR

# DOWNTOWN SNAPSHOT

Downtown Tulsa’s hotel market has experienced a wave of new development since 2009, more than doubling the number of hotels. As a result of this new product coming online, the total stock of hotel rooms increased by approximately 40% from 1,136 rooms to 1,845 rooms. All of these newer hotels, with the exception of The Mayo Hotel in 2009, are select service

options. By contrast, Downtown’s larger full-service options – the Hyatt Regency, DoubleTree by Hilton, and Holiday Inn – are each several decades old. Almost all of the hotels are located within walking distance to the BOK and Cox Centers, which are draws for tourists from Oklahoma and surrounding states.

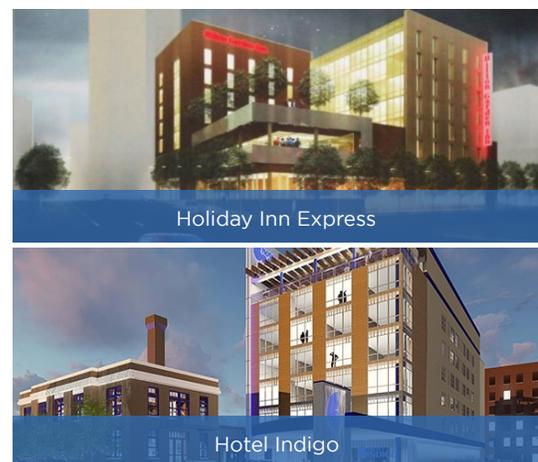


Source: STR ■ Boutique ■ Full Service ■ Select Service ★ BOK Center / Cox Center

# PIPELINE

While indicators suggest that the market is oversupplied, six new projects are in the pipeline: three hotels comprising 325 rooms are under construction while another three hotels have been proposed. Similar to the recent product that has been delivered in Downtown Tulsa, many of these projects

are smaller select service hotels, which add additional national brands to Downtown but do not address the perceived need for large hotel room blocks to accommodate conventions.



Source: Tulsa World ■ Under Construction ■ Proposed

# CONVENTION CENTER EXPANSION

As of 2018, \$7.5 billion in convention center expansion is currently underway or proposed in major US markets. Many of these markets are leading national destination locations for conventions and leisure travelers. In addition, Oklahoma

City's new convention center, currently under construction, poses direct competition to convention center upgrades and associated hotel development in the Arena District.

## Oklahoma City

New build convention center  
\$194 million

## Miami

Expansion of existing facility  
\$620 million

## Seattle

Proposed addition to existing facility  
\$1.6 billion

## Los Angeles

Proposed expansion + anchor hotel  
\$1.2 billion

## Louisville

Renovation and expansion  
\$207 million

## Fort Lauderdale

Expansion project + anchor hotel  
\$550 million

## San Francisco

Rebuild of existing facility  
\$500 million

## Kansas City

Convention Center Hotel Expansion  
\$320 million

## Orlando

Expansion of existing facility  
\$500 million

## Denver

Expansion and redesign of facility  
\$233 million

## Las Vegas

Expansion of existing facility  
\$860 million

## San Diego

Proposed addition to existing facility  
\$685 million

# NASHVILLE OMNI HOTEL

The 2013 opening of the Omni Hotel, the city's largest hotel, enabled Nashville to enhance its convention business. This outcome has been a boon to both the tourism industry and the hotel industry as demand for hotel rooms has remained high despite the major influx of supply. Nashville's Omni Hotel has helped the Music City Center flourish, and catalyzed development in Nashville's SoBro district,

an area once dominated by empty buildings and streets. Today, trendy hotels, bars, restaurants, and retail outlets populate the district with 64 retailers announcing openings in 2017 (a 56% increase from 2016). The total economic impact of the Music City Center & Omni Hotel to the City of Nashville since 2013 is estimated to be \$1.5 billion.



**+70%**

Increase in Nashville tourism visitation between 2008 to 2017

**+43%**

Increase in hotel room nights sold in 2014, the first year of operations

**+38%**

Increase in convention attendance in 2014, the first year of operations

**+4%**

Increase in occupancy rate from 2013 to 2014, indicating the spike in inventory after the Omni opened was absorbed

**5,000+**

Hotel rooms under construction in Nashville as of January 2018

Source: Downtown Nashville Omni Hotel, CBRE Hotel Report (2015), The Tennessean, Nashville Music City Center Authority Reports, Nashville Downtown Partnership Annual Report, Nashville Business Journal

Source: JW Marriott Indianapolis, IndyStar, HVS Indianapolis Hotel Market Report (2017), Visit Indy Annual Report (2017), Downtown Indy; Source: Sheraton Phoenix Downtown, The Republic, CHM Warnick Phoenix Hotel Market Report, KJZZ - Arizona NPR Affiliate, HVS Phoenix Hotel Report (2008)

## JW MARRIOTT INDIANAPOLIS

Boosted by the success of the 2012 Super Bowl and the \$275 million expansion to its existing convention center, Indianapolis' 1,005-room JW Marriott helped reignite the downtown hotel market. Prior to 2011, the hotel market was reeling from the aftermath of the Great Recession. Since the opening, the market has recovered substantially with occupancy on the rise and 11 new projects with 2,500 new rooms



JW Marriott Indianapolis

Date Opened: February 2011

Total Rooms: 1,005 rooms

Funding: Indy provided 13% of construction costs (\$60M) in exchange for a percentage of future profit

in the pipeline. In addition, the delivery of the JW Marriott spurred the redesign of Georgia Street into a shared space with one lane of traffic in each direction to host the City's outdoor events. Downtown Indianapolis is now flourishing as the mixed-use center of the region with approximately 500 eating and drinking establishments and retail businesses.

**+24%**

Increase in annual economic impact from visitors and convention attendees since the JW Marriott opened

**+14%**

Increase in convention attendance during the first five years of operations

**+39%**

Increase in hotel room nights booked during the first five years of operations

**+11%**

Increase in occupancy rate from 2011 to 2016, indicating the market absorbed the spike in inventory

**1.2M+**

Square feet of commercial space will be added to the Downtown District

## SHERATON GRAND PHOENIX

In part a victim of the financial crisis, the Sheraton Grand Phoenix (formerly the Sheraton Downtown Phoenix) did not catalyze the same level of benefit in response to the City's investment in the hotel that was experienced in both Nashville and Indianapolis. Immediately upon opening in the midst of the Great Recession, hotel occupancy rates in the region plummeted and Phoenix's

convention bookings decreased significantly. After years of fewer bookings, the convention and tourism market began to recover in 2015, but it was too late for the City to be willing to continue to operate the hotel. In early 2018, after operating the hotel at a loss for nearly a decade, the City sold the hotel to a private owner for \$255 million, costing the taxpayers an estimated \$87 million.



Sheraton Grand Phoenix

Date Opened: September 2008

Total Rooms: 1,000 rooms

Funding: The City of Phoenix spent \$350 million of taxpayer money to fund the construction of the Sheraton Phoenix Downtown

**-55%**

Decrease in hotel room nights sold in the first four years of the Sheraton's operations

**-62%**

Decrease in convention attendance in the first four years of the Sheraton's operations

**-7%**

Decrease in occupancy rate from 2008 to 2009, indicating the market struggled to absorb the influx of supply

**+43%**

Increase in hotel room nights sold from 2014-2016, coupled with a similar increase in convention attendance

**32**

New retailers, anchored by a large mixed-use project within walking distance of the hotel, slated for delivery in 2019

# HOTEL KEY FINDINGS & IMPLICATIONS

## STAGNANT MARKET

Most metrics indicate a sluggish hotel market. Although ADR is increasing, demand and RevPAR have flattened since 2014, and occupancy is falling.



These metrics suggest that the potential for traditional hotel products is limited in the near- to intermediate-term. These trends will be important to consider in determining the mix of uses to encourage in the Arena District.

## FOCUS ON SELECT SERVICE

Five out of the 10 existing hotels, and four out of the six hotels in the pipeline, offer select services. The prevalence of this hotel typology does not meet the needs of the Cox Business Center for large room blocks.



The select service hotel market is likely to become increasingly competitive in the coming years without a boost in demand to meet supply gains. Incentivizing additional select service hotel product in the Arena District could weaken existing hotels in the market.

## FEAR OF CANNIBALIZATION

Hoteliers are concerned that a convention center hotel would reduce viability of existing hotels. Evidence from other markets indicates it is possible to absorb a convention hotel without sacrificing overall occupancy, provided convention business increases in tandem.



The continued proliferation of similar select service offerings may do more to harm existing hotels than a convention hotel. However, given increasingly competitive convention and meeting dynamics in the state and nation, independent analysis of the potential for expanded convention center activity will be necessary to confirm that a convention hotel can induce additional demand that grows the market.

## CREATING A DESTINATION

Evidence from other markets indicates that creating a compelling environment is key to the success of convention centers and hotels.



Significant place-making efforts will be required to boost demand and facilitate success around a convention center hotel. These elements should include improved connections to Tulsa's most compelling and authentic Downtown districts, as well as the introduction of complementary uses in the Arena District.



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# RETAIL

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# CATEGORIES EXAMINED

Retail offerings can generally be divided into four broad categories, each falling into Convenience (Convenience Goods and Grocery) or Comparison retail (Comparison Goods and Food & Beverage). Customers are likely to frequent Convenience retail – such as pharmacies, grocery stores, and dry

cleaners – that are closest to their homes or work places. In contrast, customers are more willing to be likely to travel further for Comparison goods, such as destination restaurants, apparel, electronics, or furniture.



- Health and Personal Care Stores
- Florists
- Newspaper and Magazine
- Office Supplies
- General Merchandise
- Grocery Stores

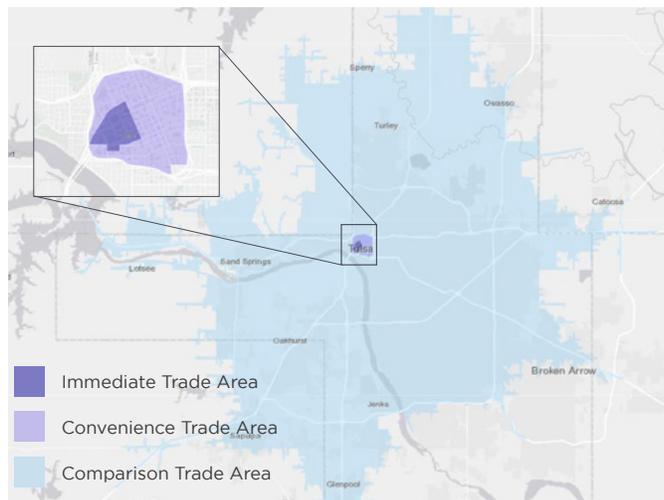


- Furniture
- Electronics and Appliances
- Clothing
- Sporting and Hobby Goods
- Books and Music
- Drinking Places
- Restaurants

# TRADE AREAS

HR&A developed three trade areas for the Arena District: the Immediate, Convenience, and Comparison Trade Areas. Customer groups within the Arena District (Immediate Trade Area) will support both Convenience and Comparison retail. Those within the

IDL (Convenience Trade Area) are also assumed to be drawn by Convenience and Comparison retail, while those living outside these areas but still within 20 minutes by car (Comparison Trade Area) will only be drawn by Comparison retail.



Retail Type	Relevant Customer Base		
	Immediate Trade Area (Arena District)	Convenience Trade Area (IDL)	Comparison Trade Area (20 min. drive)
Convenience Goods	X	X	
Grocery	X	X	
Food & Beverage	X	X	X
Comparison Goods	X	X	X

## IMMEDIATE TRADE AREA

At the moment, retail is limited in the Arena District. The only visible retail storefronts within the Immediate Trade Area are food and beverage establishments. These bars and restaurants include a mixture of quick service and sit-down local, regional, and

national brands, and attract day-time employees, such as nearby government employees, as well as attendees to events at the BOK Center and Cox Business Center.



Mix & Co



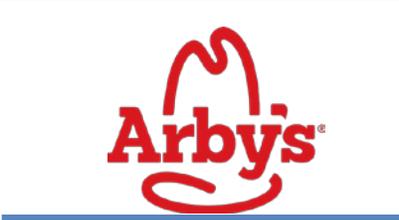
Naples Flatbread



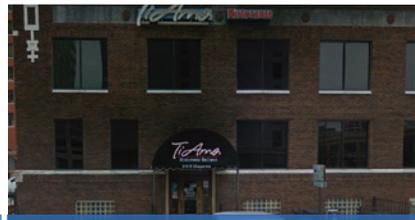
Pinkitzel Cupcakes



Starbucks



Arby's

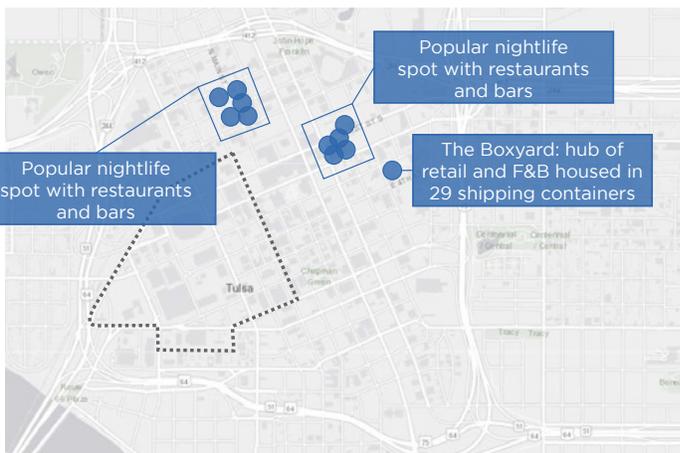


Ti Amo

## CONVENIENCE TRADE AREA

Retail in the Primary Trade Area, clustered in the Blue Dome District and Arts District, is focused on food and beverage establishments. Innovative and funky retail like The Boxyard, which opened in 2016 and utilizes a new model of small retail floorplates, has begun to serve as a catalyst for the return of retail to downtown with the introduction of hard and soft goods. Rents at The Boxyard are much higher on a per square foot basis than average rents

in Downtown given its smaller stalls, and leases are also shorter providing tenants the opportunity to experiment with new concepts on flexible terms. A proposed grocery store and new mixed-use retail planned at Santa Fe Square and 111 Greenwood, including a food hall with six to eight independent food vendors, should help to further enhance the walkable retail experience available Downtown.



Valkyrie, Arts District



The Boxyard, Blue Dome District

# COMPARISON TRADE AREA

Across the Comparison Trade Area, there is an abundant supply of regional shopping centers featuring major national and regional brands, with a concentration in South Tulsa near wealthier residential areas. The competitive supply includes super-regional malls such as Woodland Hills Mall, which features over 165 stores including destination retailers like Apple and Macy's,

and the nearby Peoria Avenue Shopping District, a shopping district in proximity to Downtown containing boutique and national retailers such as Urban Outfitters and Whole Foods. With the exception of Peoria Avenue, which will benefit from the proposed bus rapid transit line, these shopping centers are auto-oriented.



# IMMEDIATE TRADE AREA DYNAMICS

The Immediate Trade Area, which is lacking in current retail offerings with only limited food and beverage options, contains an estimated total unmet spending potential of \$41 million. The largest unmet spending potential is in the convenience retail category with over \$18 million in unmet spending. This finding aligns with developers' feedback that the

Arena District needs a pharmacy and convenience offerings. Food and beverage has the second highest unmet spending potential, with over \$10 million in unmet spending. There is no retail in the pipeline, highlighting an unrealized opportunity to meet burgeoning demand in the Arena District.

	Current Demand	Future Demand	Current Sales	Pipeline Sales	Unmet Spending Potential
Convenience Goods	\$22,840,000	\$1,720,000	\$6,520,000	\$0	\$18,040,000
Grocery	\$7,910,000	\$220,000	\$1,390,000	\$0	\$6,740,000
Food & Beverage	\$18,250,000	\$1,530,000	\$9,560,000	\$0	\$10,230,000
Comparison Goods	\$8,780,000	\$680,000	\$3,900,000	\$0	\$5,990,000
<b>Total, All Retail</b>	<b>\$57,780,000</b>	<b>\$4,150,000</b>	<b>\$21,370,000</b>	<b>\$0</b>	<b>\$41,000,000</b>

Source: ESRI

# GAP METHODOLOGY

## I. IDENTIFY CUSTOMER GROUPS

HR&A identified the primary customer groups who will likely make up the base of retail spending in the area: Current Residents, Current Workers, Current Visitors, and nearby Future Residents, Visitors, and Workers.

## II. ESTIMATE SPENDING POTENTIAL

Using multiple sources including the U.S. Census Bureau, ESRI Business Analyst, International Council of Shopping Centers (ICSC), and Visit Tulsa, HR&A estimated the total spending potential of current residents, employees, and visitors within the Immediate, Convenience, and Comparison trade areas. HR&A then projected these spending patterns for new residents, employees, and visitors within Downtown Tulsa.

## III. DETERMINE RETAIL SUPPLY

HR&A leveraged data from ESRI Business Analyst on current retail sales in the Immediate, Convenience, and Comparison trade areas by retail segment.

## IV. UNMET SPENDING POTENTIAL

Based on the interplay between existing retail sales and estimated spending potential within each of the retail categories, HR&A estimated unmet spending potential for each retail category within each trade area.

## V. SUPPORTABLE RETAIL SQUARE FOOTAGE

To estimate the amount of retail space that could feasibly be absorbed within the Arena District, HR&A leveraged metrics on retail sales per square foot taking pipeline retail sales into account to translate unmet retail spending potential into associated square footage. HR&A then applied realistic capture rates to these estimates in order to project the amount of square footage within each category that could be supported in the Arena District.

# CUSTOMER GROUPS FOR ARENA DISTRICT RETAIL

Demand for potential retail at the Arena District will derive from four primary consumer groups:



Source: ESRI, Visit Tulsa, Tulsaworld.com

# CONVENIENCE TRADE AREA DYNAMICS

The Convenience Trade Area contains an estimated total unmet spending potential of \$15 million, with the demand exclusively coming from convenience needs. Existing retail for all other retail categories, including food and beverage, meets the entire demand for the trade area, which predominately comes from existing workers. That current food & beverage spending exceeds current demand for

food & beverage from existing downtown customer groups indicates that Downtown is already a food & beverage destination that attracts customers from outside its boundaries. While there is currently unmet demand for convenience retail of upwards of \$15 million, over 110,000 square feet of retail across a variety of retail types is in the pipeline, which can help address Downtown’s unmet spending potential.

	Current Demand	Future Demand	Current Sales	Pipeline Sales	Unmet Spending Potential
Convenience Goods	\$34,560,000	\$5,150,000	\$31,720,000	\$3,210,000	\$15,430,000
Grocery	\$12,670,000	\$1,840,000	\$3,070,000	\$16,000,000	\$0
Food & Beverage	\$30,680,000	\$3,380,000	\$39,430,000	\$34,160,000	\$0
Comparison Goods	\$12,240,000	\$2,170,000	\$19,470,000	\$0	\$0
<b>Total, All Retail</b>	<b>\$90,150,000</b>	<b>\$12,540,000</b>	<b>\$93,690,000</b>	<b>\$53,370,000</b>	<b>\$15,430,000</b>

Source: ESRI

# COMPARISON TRADE AREA DYNAMICS

The Comparison Trade Area, which contains 5+ million square feet of retail space, is well-served by existing retail with no obvious unmet spending potential for the Arena District to capture. This finding does not indicate that suburban residents

will not shop at Downtown retailers, but does suggest that Downtown retail must be that much more compelling to attract these shoppers away from existing auto-oriented shopping centers in South Tulsa that currently meet their needs.

	Current Resident Demand	Current Sales	Unmet Spending Potential
Food & Beverage	\$635,740,000	\$970,840,000	\$0
Comparison Goods	\$812,750,000	\$1,436,790,000	\$0
<b>Total, All Retail</b>	<b>\$1,448,490,000</b>	<b>\$2,407,630,000</b>	<b>\$0</b>

# CAPTURABLE SPENDING POTENTIAL

Based on average sales per square feet for different retail types, Downtown Tulsa could hypothetically support over 140,000 square feet of retail. Because the minimum concentration for some of these retail types is larger than the amount of square feet supported, however, these retail typologies would likely not be feasible in Downtown Tulsa. Therefore, HR&A estimates that there is 116,000 square feet of retail demanded in the Immediate and Convenience Trade Area that could potentially be fulfilled, consisting of unmet potential for convenience goods throughout Downtown and food and beverage establishments specifically in the Arena District.

HR&A estimates that the Arena District can support approximately 35,000 SF of retail

programming. This proposed program includes 15,000 SF of convenience goods, approximately 15% of the future gap, to support residents, workers, and visitors who attend events in the District. The remainder of unmet demand for convenience retail will likely be met closer to existing office and retail nodes in the Deco, Arts, Blue Dome, and Greenwood Districts. The proposed program also recommends filling the full F&B gap as this gap is localized with unmet spending potential only in the Arena District, but not other neighborhoods in Downtown. This F&B must be correctly positioned for success, including proper sizing and location.

	Unmet Spending	Sales PSF	Hypothetical Maximum SF Supported	Minimum Size Demanded	Adjusted Maximum SF Supported	Feasible Arena District Retail Program (SF)
Convenience Goods	\$33,470,000	\$350	96,000	3,000	96,000	15,000
Grocery	\$6,740,000	\$500	13,000	30,000	0	
Food & Beverage	\$10,230,000	\$500	20,000	5,000	20,000	20,000
Comparison Goods	\$5,990,000	\$500	12,000	50,000	0	
<b>Total, All Retail</b>	<b>\$56,430,000</b>		<b>141,000</b>		<b>116,000</b>	<b>35,000</b>

# PROGRAM RECOMMENDATIONS

## FOOD & BEVERAGE OUTLETS

The Arena District can support up to 20,000 SF of food and beverage space, some of which can be positioned as a food hall to leverage existing strengths and entice visitors to dine at vendors' brick and mortar stores. Additional food and beverage offerings beyond this amount will require building true critical mass that attracts suburban residents to the District.



## CONVENIENCE GOODS & SERVICES

Approximately 15,000 SF of convenience retail and services can be supported in the Arena District, based on the unmet demand of residents, workers, and visitors. Per conversations with developers, this retail could include a pharmacy and other service-related retail storefronts, such as banks and gyms, in centrally located, accessible areas.



# NASHVILLE'S MUSIC CITY CONVENTION CENTER

Nashville's Music City Convention Center did not include any retail space when it opened in 2013. In 2017, Nashville approved a \$20 million expansion that will introduce 4,350 SF of retail space in the form of a "retail market," with a food and beverage outlet, kitchen spaces, and a place for patrons to buy convenience goods.



Although the Convention Center did not initially include retail space, its recent funding package highlights that even the most successful convention centers are recognizing the importance of enhancing food and beverage options and providing convenience goods to entice attendees to stay and spend money.

# 4,350

planned SF of retail connected to the Music City Convention Center

# RETAIL KEY FINDINGS & IMPLICATIONS

## DOWNTOWN CONCENTRATED IN F&B

The majority of existing retailers in Downtown Tulsa are F&B, and nearly 70% of retail product in the pipeline will also be F&B establishments. The Arena District, however, is underserved by all retail including F&B.



There is an opportunity to deliver a food and beverage program that leverages successful local restaurants/food trucks by opening a food hall that allows these retailers to showcase their product. This flexible food hall concept could be complemented by additional sit down and fast casual offerings that build critical mass.

## LACKING CONVENIENCE GOODS

There are limited convenience goods in Downtown Tulsa like pharmacies, general merchandise stores, and everyday services that supply the infrastructure of living and working.



Convenience retail and services can attract and enhance the desirability of Downtown for potential new residents. This new product should include services such as banks, gyms, yoga studios, and retail like general merchandise stores and pharmacies. Introducing these amenities within or close to the Arena District will enhance its appeal to both residents and visitors.

## NEW RETAIL MODELS

The Boxyard is providing a new model for supplying hard and soft goods, an undersupplied retail need Downtown.



Should the nascent retail space prove itself, a similar concept offering small, flexible retail spaces could be considered for the Arena District in the long-term.

## GROCERY NEED

There is unmet spending potential in Downtown Tulsa for a grocery store, which is a key amenity to entice potential residents.



A proposed grocery store in East Downtown is positioned to capture the majority of the unmet demand. Therefore, there is likely not an opportunity to deliver a grocery store in the Arena District in the near- or intermediate-term.



BOK CENTER



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# **002 | IDENTITY ASSESSMENT**

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# BUILDING A CIVIC IDENTITY

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“Cities have the capability of providing something for everybody, only because, and only when, they are created by everybody.” — Jane Jacobs

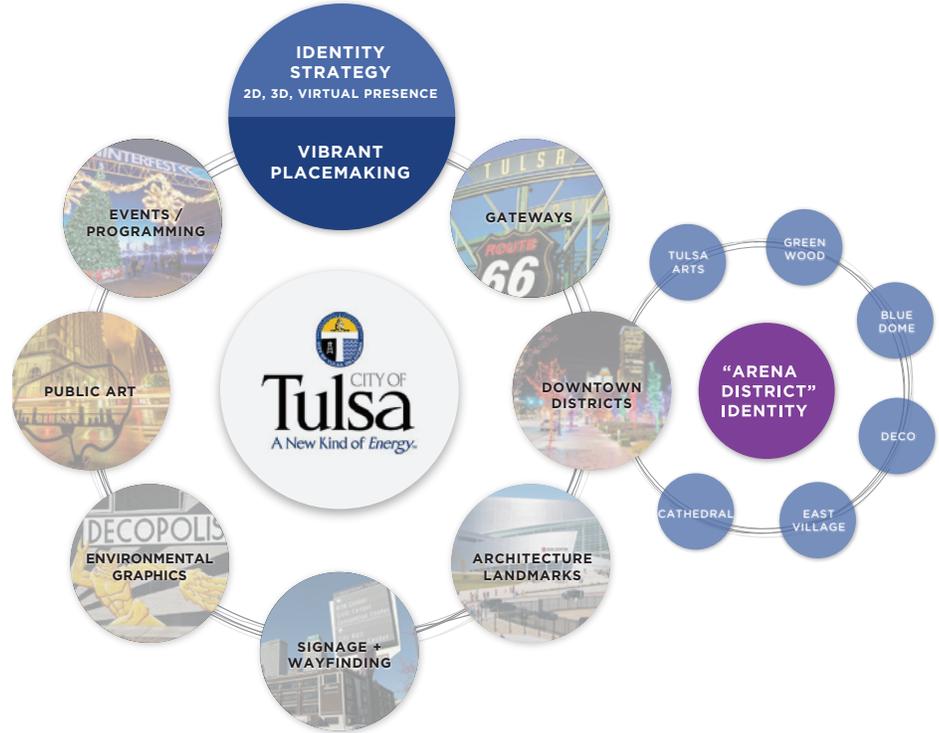
# CIVIC IDENTITY BUILDING STRATEGY

## IDENTITY FRAMEWORK

**2D** - graphic “kit of parts”, print communication, promotional materials, stationery systems

**3D** - place identity, gateways, district identifiers, architecture, signage and wayfinding, environmental graphics, placemaking, public art, events and programming

**VIRTUAL** - dynamic web, app, social media, and presentation solutions



## IDENTITY BUILDING STRATEGY

Although Downtown Tulsa’s civic identity has evolved into an eclectic mix of vibrant districts, the physical audit and engagement sessions that we have performed reveal that the project focus area suffers from a lack of distinct identity. Given its location adjacent to highways and railroad infrastructure, the entry arrival experience and connectivity to other vibrant downtown districts is also of key concern.

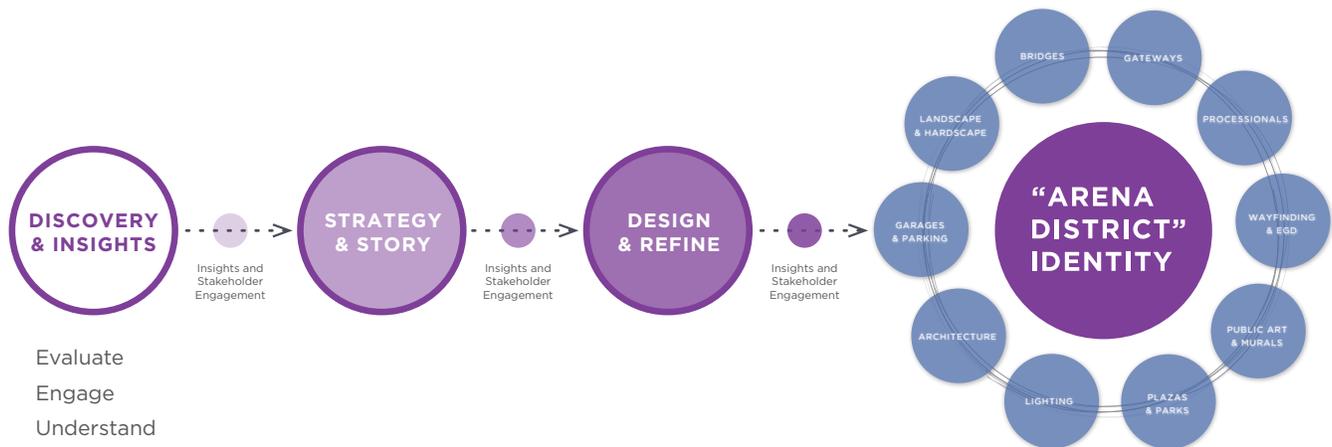
Building a comprehensive civic identity for the project focus area will require a strategic and holistic framework that considers all brand touchpoints (2D, 3D and Virtual) in the user experience journey.

In addition, the identity building platform will be informed by the physical audit findings, extensive stakeholder and community engagement workshops, feedback Tulsa surveys, and outcomes of the 2016 Resonance Report.

Our goal for this project area is to address these key concerns by developing a comprehensive civic brand strategy and recommendations that:

- **ENHANCE** the civic identity of the project focus area
- **CREATE** a best-in-class visitor and entry arrival experience
- **CONNECT + WELCOME** local, regional, and international visitors to unique downtown Tulsa amenities and attractions
- **ENGAGE** visitors in an authentic Tulsa experience rooted in history culture, art, and placemaking

# CIVIC IDENTITY BUILDING PROCESS



## IDENTITY BUILDING PROCESS

To be successful, the civic identity building process requires significant buy-in and participation from the stakeholders and community to assure project goals are being met and the resulting identity reflects an authentic Tulsa story and sense of place.

In our process, we utilize Discovery, Insights, Strategy and Design methodologies to create an implementation plan that will achieve your city’s goals.

Each phase in the process heavily references our discovery and insights findings. The strategy phase will then guide the design and recommendations moving forward.

- **DISCOVERY + INSIGHTS**

Evaluate, Engage, Understand

- **STRATEGY + STORY**

Civic Identity Framework Development  
Wayfinding + Placemaking Programming  
Story/Narrative Building Framework  
Place Naming Strategy

- **DESIGN + REFINE**

Design + Recommendations

# IDENTITY VOICE & DESIRED ATTRIBUTES

This project provides an opportunity to transition the current Arena and Convention Center destination-based experience into a thriving district and/or downtown urban neighborhood that engages prospective visitors and attracts talent and economic development.

## REGION/DOWNTOWN



## DISTRICT/NEIGHBORHOOD

"A **vibrant** district during the **day and night** for its community."

"This should be different than the other areas of downtown and more **colorful**."

"The district should have a village character that is **connected to Downtown Tulsa** and surrounding areas."

MKSK WORKSHOPS

"The district should develop a **unique sense of place**...complementary to [its surroundings]."

"**Connectivity** to the surrounding neighborhoods and districts..."

FEEDBACK TULSA

"The district has the potential to have a **meaningful and convenient connection to the riverfront**."

## IDENTITY VOICE + DESIRED ATTRIBUTES

As stated, our Discovery and Insights gathering process has included an extensive brand and physical audit of Downtown Tulsa and benchmark cities; facilitation of stakeholder and community engagements sessions; and review/analysis of feedbackTulsa surveys, and the 2016 Resonance Report.

The results of this thorough discovery phase have revealed key insights and desired attributes that we will continue to reference and build from. The goal of the strategy and design recommendation phases is to provide a civic identity framework that truly reflects the voice and desired outcomes of the stakeholder, local residents, and regional/international visitors to Downtown Tulsa and this project focus area.

## Key identity building insights for this project area include:

- There is a lacks a cohesive identity and unique sense of place
- The identity should provide an authentic Tulsa experience, but should not infringe upon the success of current districts
- The BOK Center, Library, and Cox Business Center are recognized as important regional anchors, but the area lacks connectivity to other vibrant downtown destinations and amenities
- Tulsans do not see this project area as a "district" rather an opportunity to build a vibrant neighborhood identity and regional entertainment destination that engages visitors, attracts talent, and generates economic development
- The entry experience into the CBD is lacking and has no true front door. Because of its location, this project area can become a GATEWAY for downtown that connects and welcomes regional and international visitors to Downtown Tulsa and the region as a whole

# IDENTITY POSITIONING | EXISTING

 <p>CITY</p>		
<p>OKLAHOMA CITY</p> <p>CVB</p>		
 <p>DISTRICTS</p>		

## IDENTITY POSITIONING

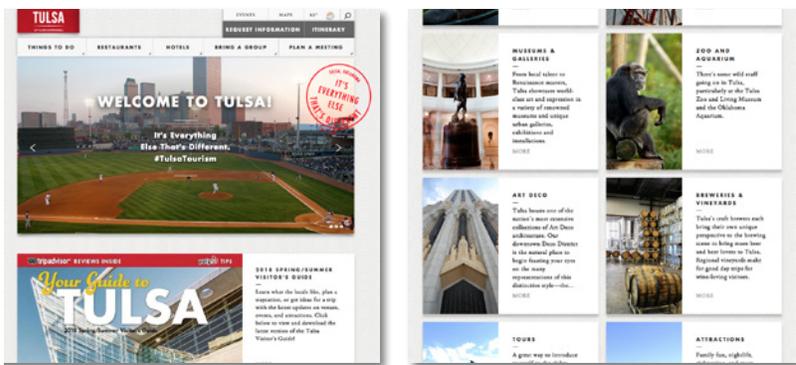
Successful civic identities are built on an interconnected and consistent visual and verbal communication strategy (2D, 3D, and Virtual) that enhances the visitor experience from the “digital highway” to the “front door” of the city.

**TULSA BRAND POSITIONING**  
**City of Tulsa**  
 local, formal, corporate honoring the past, enriching the experience of the present

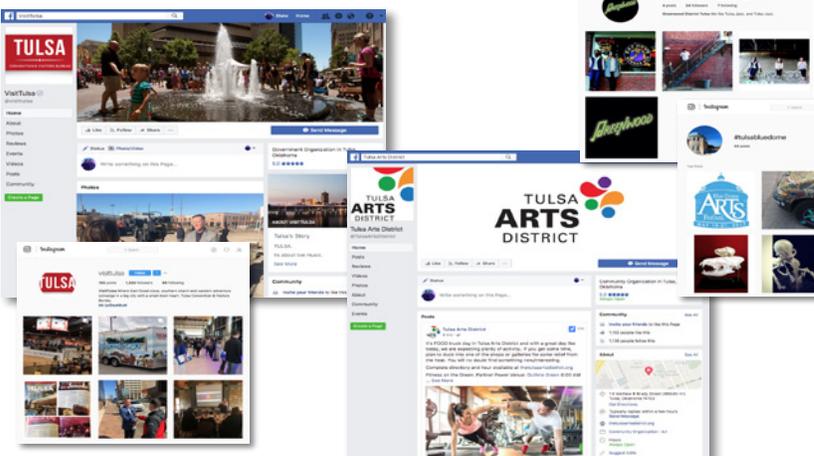
**Tulsa (Up Close + Personal)**  
 regional, bold, welcoming join us - we have a story to tell

**Districts**  
 local, eclectic, vibrant individually unique, yet connected in culture and local authenticity

### Website: Highlighting Regional Tulsa Attractions



### Social Media: Highlighting Regional/District Based Attractions



An aerial map of Tulsa, Oklahoma, rendered in a light blue color. The map shows a grid of streets and various building footprints. A large, dark blue circular area is visible in the upper left quadrant. The text "IS TULSA BUILDING A DISTRICT OR A NEIGHBORHOOD?" is centered on the map, with "IS TULSA BUILDING A" in blue and "DISTRICT OR A NEIGHBORHOOD?" in white. Two horizontal white lines are positioned above and below the text.

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**IS TULSA BUILDING A  
DISTRICT OR A NEIGHBORHOOD?**

---

# DOWNTOWN TULSA | AUTHENTIC LOCAL VIBE



## DISTRICT OR NEIGHBORHOOD?

The project focus area spans 30-blocks and is positioned on the western edge of downtown bordered by railroad tracks to the north, Boulder Avenue to the east, 11th Street to the south, and the railroad tracks along the west.

Although the BOK Center, Library, and Cox Business Center provide consistent activity in the area, there is a lack of distinct identity and cohesive connectivity to other vibrant and revitalized districts in the CBD. It has also been identified that the entry experience into CBD is lacking — there is no true front door to welcome visitors to the city.

Utilizing our comprehensive civic identity building framework and process, we have identified the challenges as well as the key opportunities to strengthen the place identity of the project area, create opportunities for connection, and establish a best-in-class visitor arrival experience.

As identified through the Discovery and Insights process, Tulsans do not see this project area as a “district” rather an opportunity to build a vibrant neighborhood identity and regional entertainment destination that engages visitors, attracts talent, and generates economic development

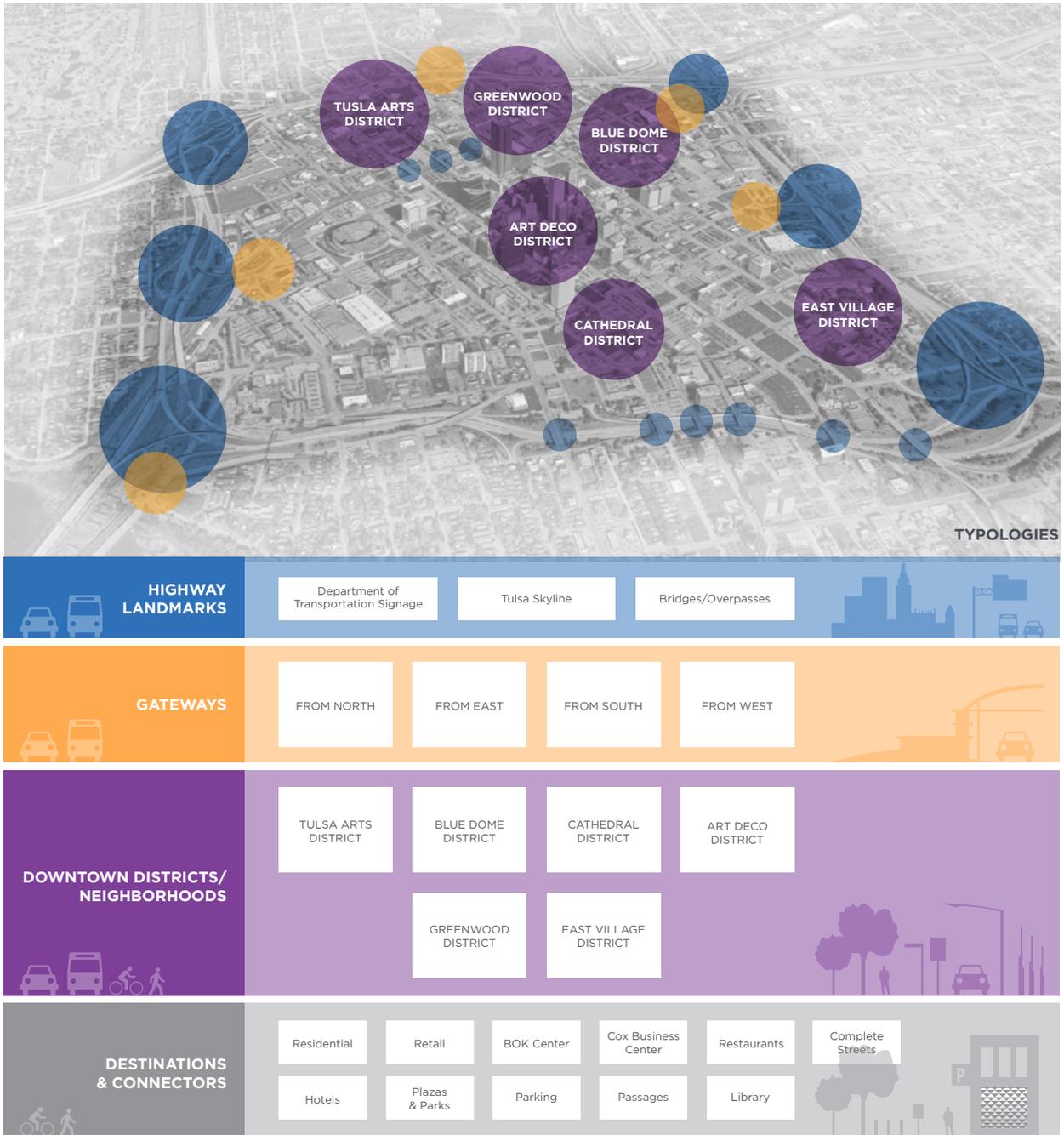
Because of its location, this project area has the opportunity serve as the GATEWAY for Downtown Tulsa, connecting and welcoming regional and international visitors into downtown and the region.

Throughout the next phase we will continue to work collaboratively with the project design team, city working group, and project stakeholders to bring the vision to life with a strategic implementation plan that includes:

- Civic Identity Framework Development
- Wayfinding + Placemaking Programming
- Story/Narrative Building Framework
- Place Naming Strategy

# EXPERIENCE HIERARCHY | EXISTING

- Highway Landmarks
- Gateways
- Downtown Districts & Neighborhoods



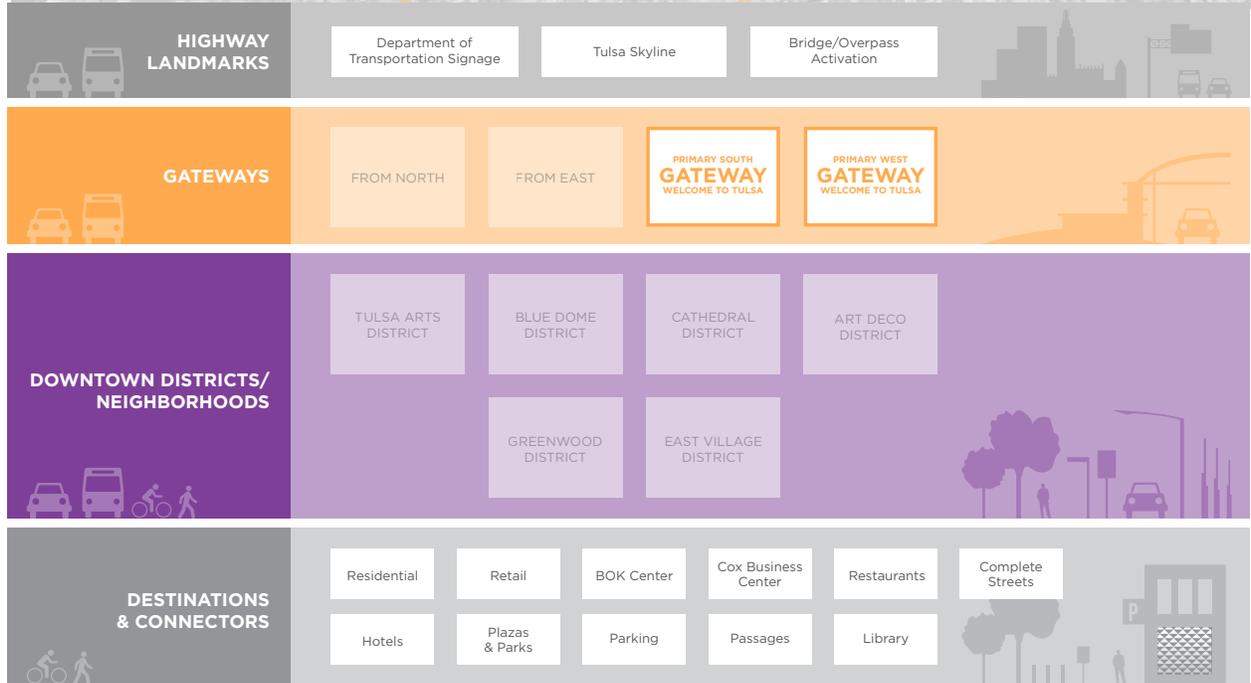
## ARRIVAL SEQUENCE: FROM HIGHWAY TO HALLWAY™

The visitor arrival sequence begins on the highway through a series of touchpoints that lead to the halls of the city. Throughout this sequence, there are a range of opportunities to create a best-in-class visitor arrival experience that welcomes, connects, and elevates the place identity through a strategic framework and hierarchy of typologies (Major Highway Landmarks, District and Neighborhood Gateways, Signage + Wayfinding, and Public Art + Placemaking).

# EXPERIENCE HIERARCHY | PROPOSE

## GATEWAY: DOWNTOWN'S FRONT DOOR

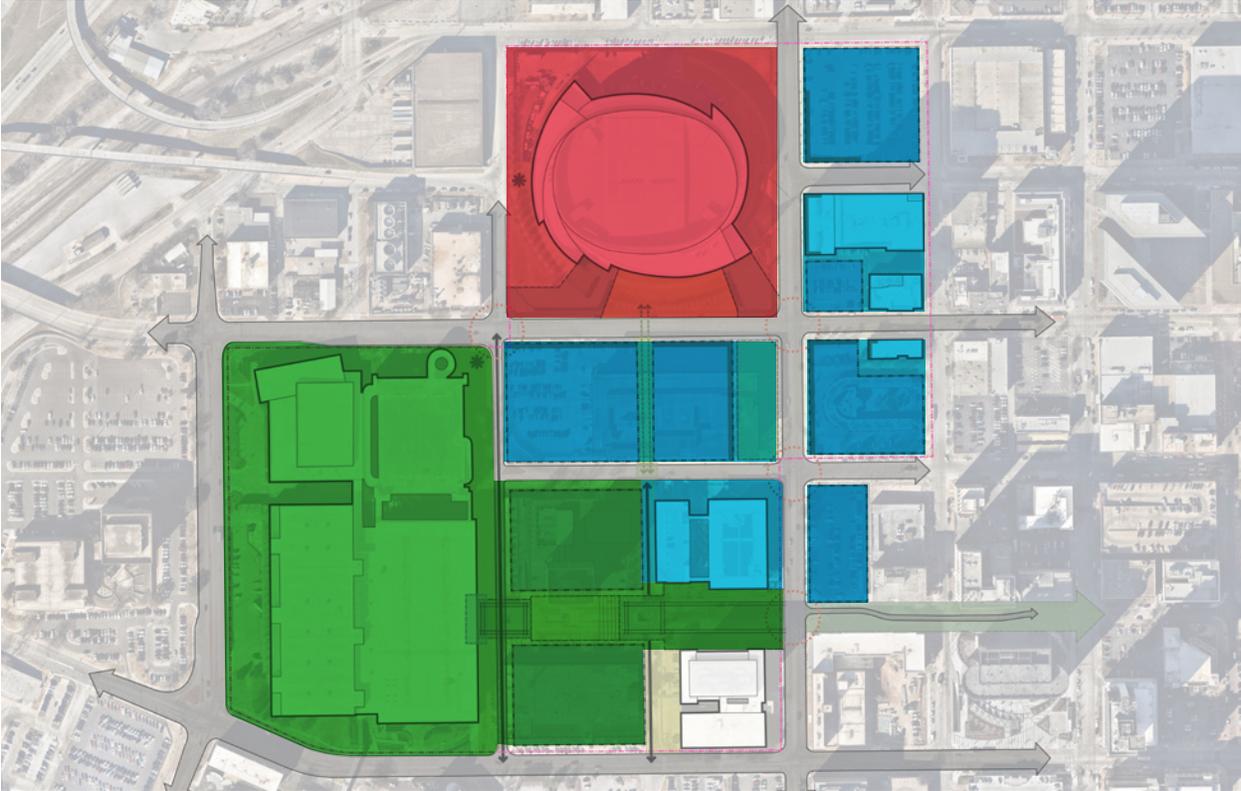
- Gateways
- Downtown Districts & Neighborhoods



## GATEWAY: DOWNTOWN TULSA'S FRONT DOOR

This diagram illustrates the opportunity to position the project area as the “Gateway” to Downtown Tulsa. Building on the metaphor of “Gateway”, the civic identity will be framed around the concept of this area serving as a “front door” — welcoming local, regional, and international visitors into downtown. The civic identity of the project area will come to life through a network of connected typologies, narratives, and local amenities.

# NARRATIVE BUILDING FRAMEWORK | EXAMPLE



theme / zone

<p><b>INTERNATIONAL WELCOME</b></p> <p>COX Business Center Hotel Convention Center Park Civic Center Corridor</p>	<p><b>REGIONAL MUSIC + ENTERTAINMENT</b></p> <p>BOK Center Restaurants Mixed Use</p>	<p><b>LOCAL AUTHENTIC TULSA</b></p> <p>Library Signature Park Mixed Use</p>
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<p><b>narrative</b></p>		
<p><b>“TULSA MEETS WORLD”</b> Narrative of Tulsa’s past+ present</p> <p>PAST</p> <ul style="list-style-type: none"> <li>• Oil</li> <li>• Railroad</li> <li>• Stockyards</li> <li>• Aviation</li> <li>• Sister Cities</li> </ul> <p>PRESENT</p> <ul style="list-style-type: none"> <li>• Technology</li> <li>• Innovation</li> <li>• Entrepreneurship</li> <li>• Arts + Culture</li> </ul>	<p><b>“ENTERTAINMENT HERITAGE”</b> Musicians, Actors/Actresses, + Entertainment Influencers</p> <ul style="list-style-type: none"> <li>• Local Tulsa Sound</li> <li>• International Shared Talent</li> </ul>	<p><b>“OUR HOME / YOUR NEIGHBORHOOD”</b> Prominent Longtime Residents</p> <ul style="list-style-type: none"> <li>• Native American heritage</li> <li>• Settlements before and today</li> <li>• Topo/Geographic history</li> </ul>

<p><b>tone</b></p>		
<p>Welcoming Professional Open/ Connective</p>	<p>Vibrant High Energy Inspirational</p>	<p>Authentic Reflective Calm</p>



# NAMING STRATEGY | TULSA ARTS DISTRICT EXAMPLE

Naming Strategies	Experience Naming Opportunities					
	District/Neighborhood	Garages & Lots	Cultural Centers	Buildings & Development	Parks & Plazas	Public Art
<b>NAVIGATION</b> Nomenclature based upon prime navigational directions such as: <i>North/South/East/West/Central</i> <i>A, B, C / 1, 2, 3</i>						Center of the Universe
<b>FUNCTION</b> Nomenclature based upon the building function, such as: <i>Arena, Convention Center, Apartments</i>	Tulsa Arts District					
<b>ORIENTATION</b> Nomenclature based upon the user orientation to entrance / exit, such as: <i>3rd St., 5th St., South Denver Ave.</i>		Archer Street Lot		Metro at Brady		
<b>HONORIFIC</b> Nomenclature based upon historic name or legal proper name, such as: <i>Cyrus Avery, Gene Autry, J.J. Cale, Joe Baker, Woody Guthrie</i>			Brady Theater Woody Guthrie Center	Cain's Ballroom	Guthrie Green	
<b>DONOR   SPONSOR</b> Nomenclature based in honor of a named donor or sponsor, such as: <i>Gift of Edward M. Brown</i> <i>Dedicated October 2018</i>			Henry Zarrow Center for Art & Education			

*Place-making helps to build a sense of place, tell a unique story, connect visitors, and strengthen neighborhood pride and identity. Success may be measured by improved recognition of district/neighborhood assets, consistent design, new destination businesses and jobs, and decreased vacancy rates. — Venture Portland*

## NARRATIVE BUILDING FRAMEWORK

The diagram to the left illustrates an example of how we will begin to build the civic identity and narrative framework in conjunction with the development of the space programming. The framework will include identifying, designing, and programming the placemaking types as well as the narrative to support the experience. Themes could be zoned to support a broader area of experience.

For example, The theme of “International Welcome” could come to life in the (GREEN ZONE - Cox Business Center / Hotel / Park and Civic Corridor). The narrative of “Tulsa Meets World - past + present” could be told through a series placemaking opportunities defined as part of the space programming studies. The goal is to create an experience that is welcoming, professional, and connects visitors in an immersive and authentic Tulsa experience.

## PLACE BASED NAMING STRATEGY

The diagram above illustrates an example of how the “naming” of place or area can also help to build the narrative framework and strategy. This example illustrates named spaces in the existing Tulsa Arts District, but the strategy could easily translate to the “Gateway” project area.

For example, the row across the top identifies place or space opportunities to be named (District/Neighborhood, Garages + Lots, Cultural Centers, Buildings+ Developments, Parks + Plazas, Public Art). The column on the left identifies strategies for how the naming could be themed such as naming based on (Navigational Directions, Function, Orientation, Honorific, Donor/Sponsor).

# EXPERIENCE AESTHETIC

TRADITIONAL



DYNAMIC

## EXPERIENCE AESTHETIC

Civic identities have a range of personalities on a dial tone of traditional to highly dynamic and/or immersive.

Throughout this next phase of work, we will begin to establish the design criteria, aesthetic personality, voice and identity of the “Gateway” project area. This process will further validate the civic identity framework strategy, components, and narrative to create a truly authentic Tulsa experience.

We have also researched other benchmark cities as a method of comparison and evaluation moving forward.

# TULSA | BENCHMARKING



## TULSA "Authentic Local Vibe"

- Established and emerging districts that have their own eclectic identities, reflect an authentic local vibe, and collectively tell the past and present Tulsa story
- District-based wayfinding
- Investment in new gateways, open spaces, public art + placemaking

# OKLAHOMA CITY | BENCHMARKING



Bricktown defined by multiple visible signs, historic brick architecture, and evenly distributed destinations



Deep Deuce District defined by signage and prominent grill



The Paseo Arts District defined by unique, Southwestern-style retail & galleries



Downtown wayfinding combines consistent directionals, trailblazers, and maps



Chesapeake Arena has own signage and streetscape language in vicinity



## OKLAHOMA CITY “Authentic Vintage Vibe”

- Districts have their own eclectic identities, that reflect a personality unique to place
- Bricktown is a planned district that builds onto existing historic architecture
- Destination-based multi-modal wayfinding strategy

# FORT WORTH | BENCHMARKING



Convention Center is downtown-adjacent and integrates with water gardens



Downtown wayfinding has district identifiers



Varied, individual district identities



Prominent bridge creates city gateway from west



Literal expressions of heritage in Stockyards



Public art as placemaking (plaza, roundabout)



## FORT WORTH “Pride in Heritage”

- District have unique identities, but reflect a common cowboy aesthetic
- Destination-based wayfinding strategy
- History reenacted in Stockyards

# KANSAS CITY | BENCHMARKING



Digital signage and public plazas surround Sprint Center



Wayfinding w/district IDs



Modern and historic illuminated signage creates sense of place and vibrancy for Power & Light District



Garment District public art



Conv. Center arch. placemaking



## KANSAS CITY

“Composing Old with New”

- CVB/tourism equally represents districts, destinations, and neighborhoods to compose a downtown identity reflective of old and new
- District-based wayfinding strategy with icon system
- Power & Light feels equal parts vintage and forward-thinking
- Public transit (streetcar) seen as a downtown connector and key to cross-town vibrancy

# INDIANAPOLIS | BENCHMARKING



Lucas Oil Stadium connects to Conv. Center, but lacks immediate surrounding vibrancy



Broad Ripple carries old-fashioned Main Street vibe



Mass Ave. = spine uniting new & old culture



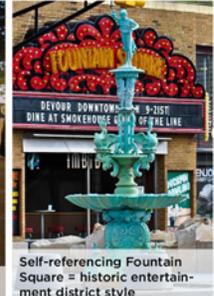
Canal Walk provides natural respite and gathering place downtown



Downtown wayfinding to destinations & districts



Modern historic interpretation along Cultural Trail



Self-referencing Fountain Square = historic entertainment district style



## INDIANAPOLIS

### “Curated Cultural Districts”

- Downtown Indy curates district identities with a common graphic “kit of parts” approach to create unity yet diversity within the system
- District-based, quadrant-based, AND destination-based wayfinding strategy
- Stadium/arena connected to convention center but still feels like an island without enough surrounding amenities...YET

# CINCINNATI | BENCHMARKING



The Banks (residential, dining, recreation) sits between stadiums

Over-the-Rhine's look & feel is defined by historic architecture

Landmarks as canvases for BLINK art & light festival

Riverfront public art

Convention Center gateway signage visible from interstate

Eclectic bridges form south gateway over Ohio River

Citywide wayfinding signage



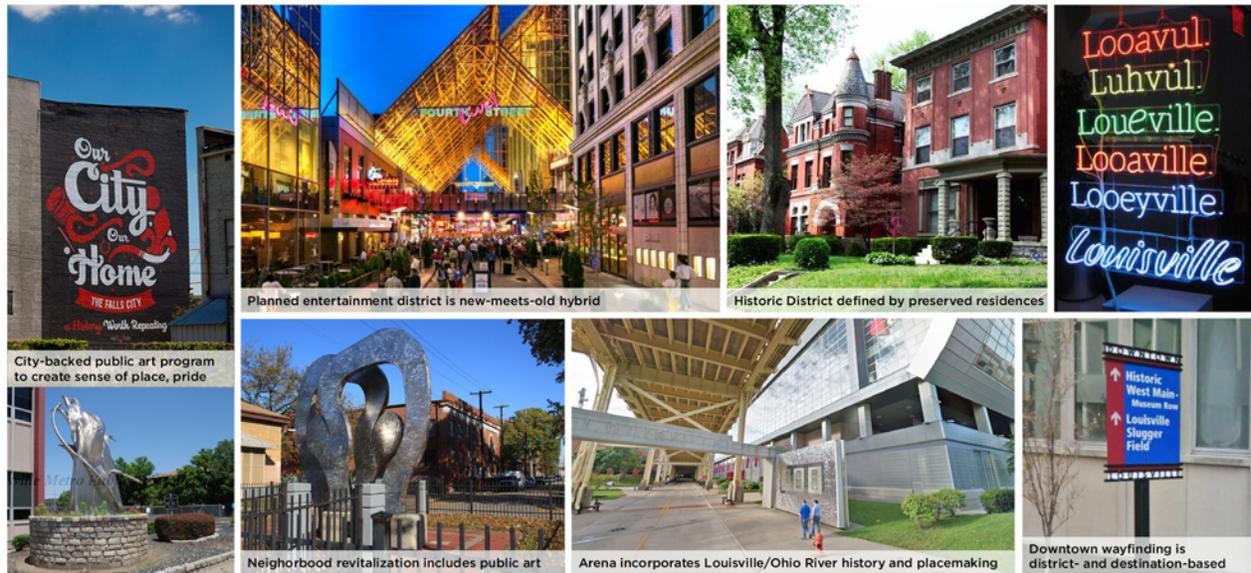
Cincinnati's downtown has two major districts with unique visual identities, but overall it is based around major destinations: Findlay Market, riverfront and inland parks, stadiums, and others.

## CINCINNATI

“Complementary + Connected Urban Districts ”

- District-based wayfinding strategy
- Districts have their own eclectic identities, but build on the CVB brand color system and forms
- The Banks (new) and OTR (historic) are distinctive districts linked by streetcar; other areas emerging (Pendleton, West End) or more destination-based
- Riverfront stitches together stadiums, entertainment, museums, art, and parks

# LOUISVILLE | BENCHMARKING



City-backed public art program to create sense of place, pride

Planned entertainment district is new-meets-old hybrid

Historic District defined by preserved residences

Downtown wayfinding is district- and destination-based

Neighborhood revitalization includes public art

Arena incorporates Louisville/Ohio River history and placemaking

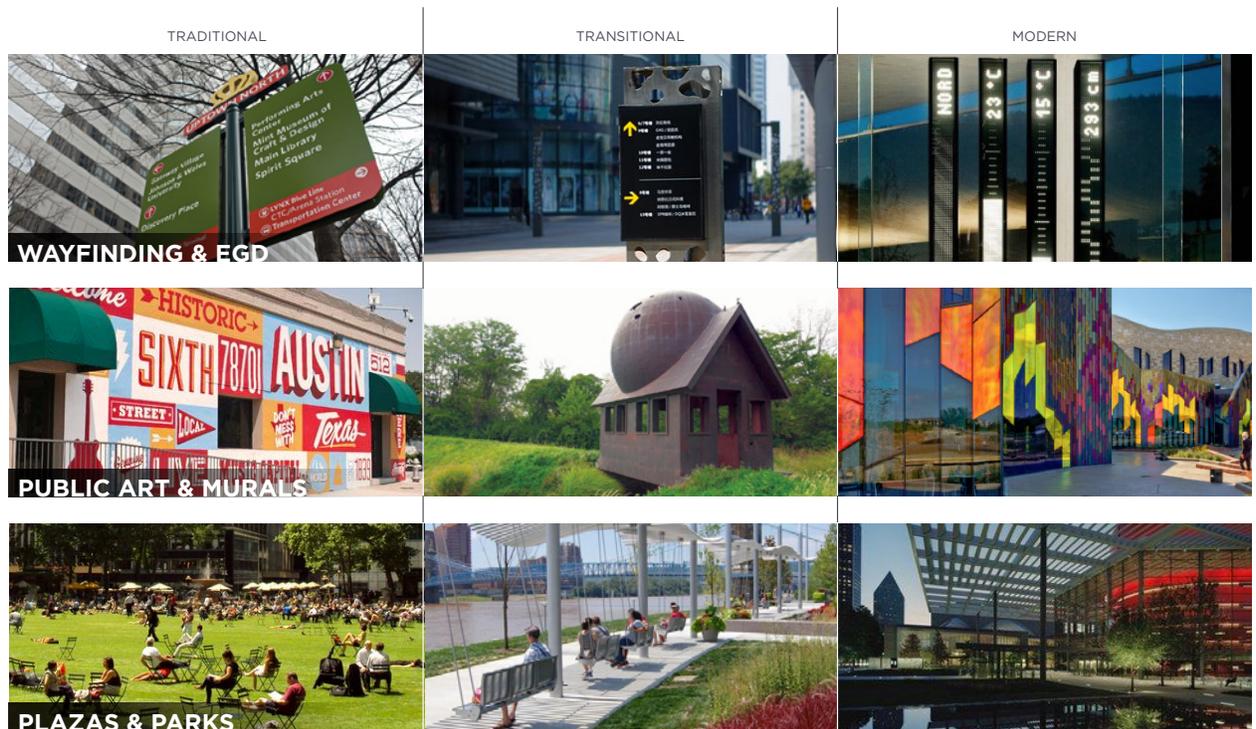
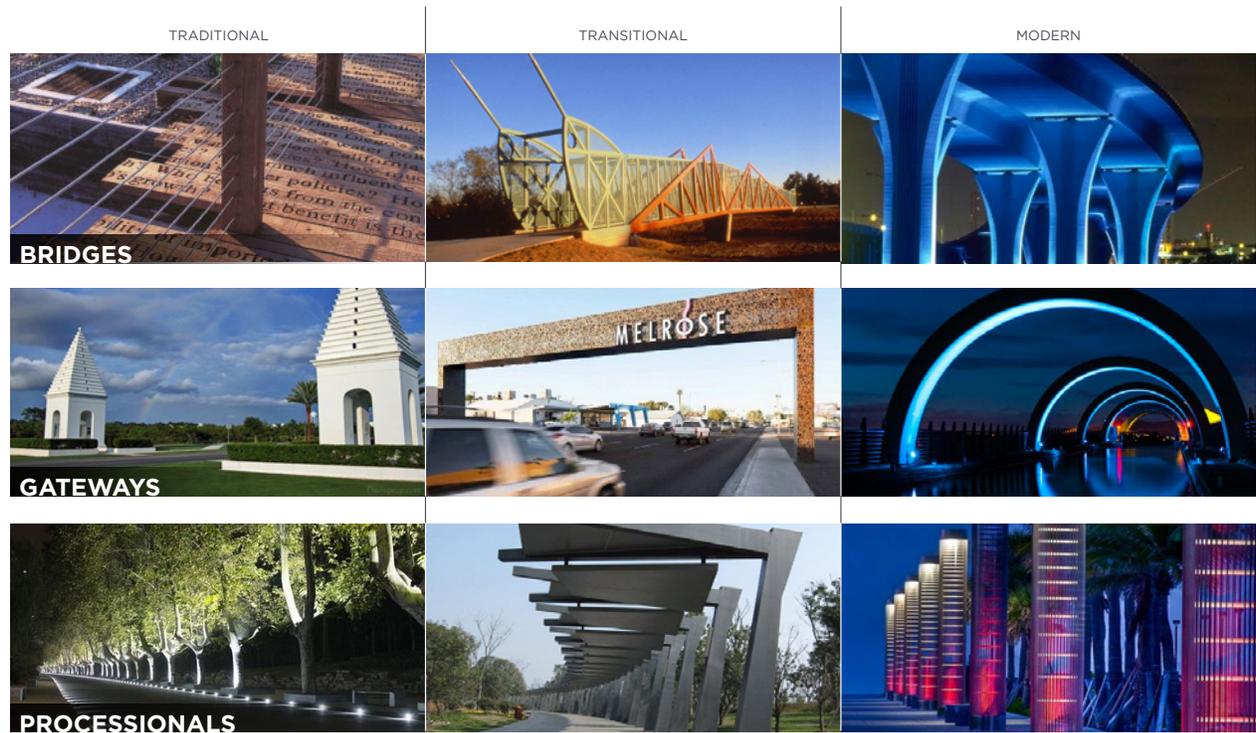


## LOUISVILLE

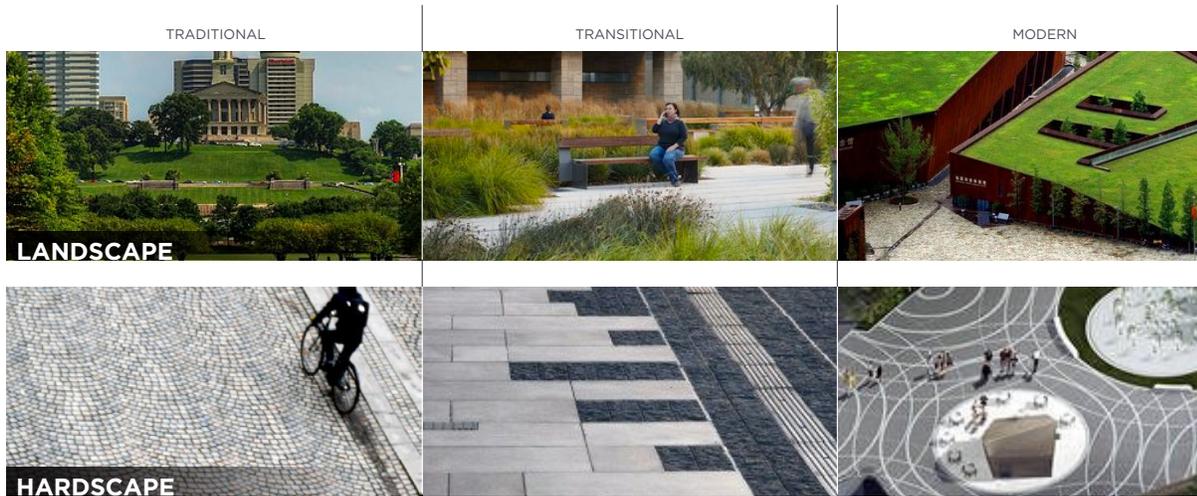
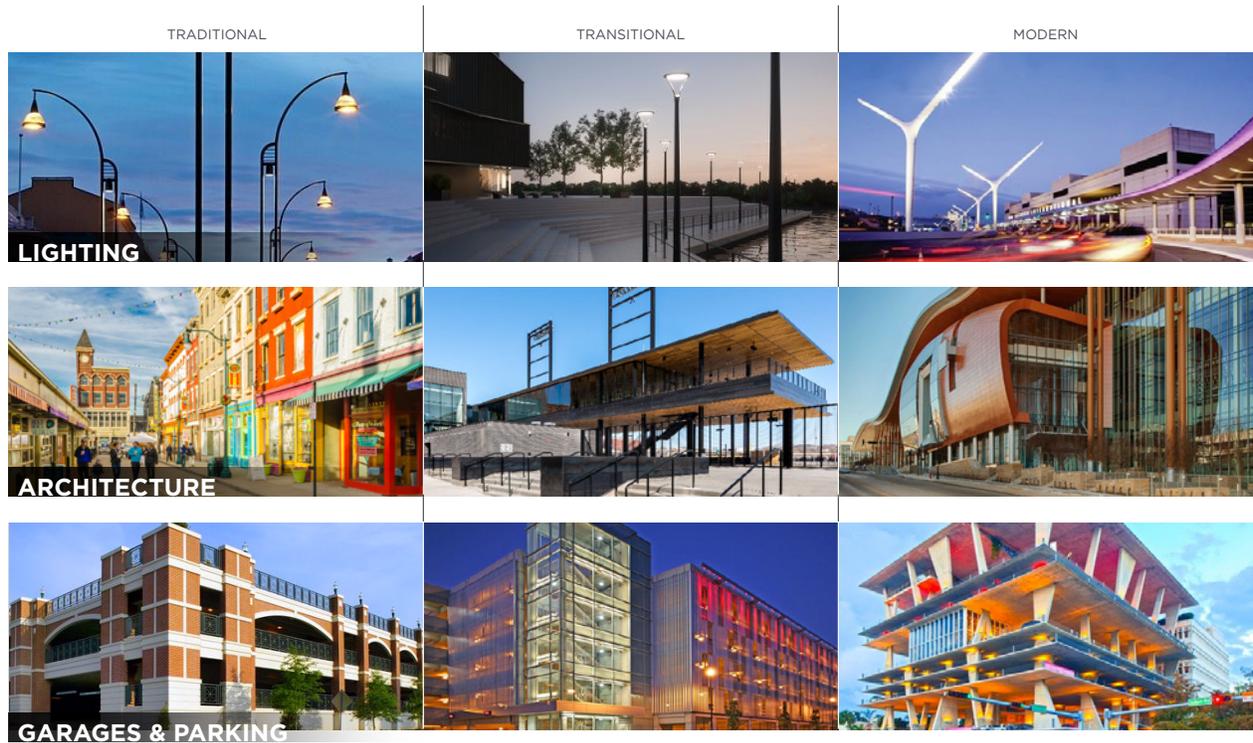
“Connecting the Dots – Riverfront, Arena, Conv. Center, + Downtown Entertainment”

- Eclectic mix of district and destination-based identities unique to place
- District and Destination-based wayfinding strategy
- Emerging outer neighborhoods

# EXPERIENCE TYPOLOGIES



# EXPERIENCE TYPOLOGIES





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# **003 | LAND USE ASSESSMENT**

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# CHAPTER THREE

# LAND USE ASSESSMENT

## INTRODUCTION

This chapter includes an existing conditions analysis of the Arena District's land uses focused on identifying the effects of current uses on the built environment. This baseline understanding of the district is used to create an initial catalytic investment framework that outlines priority development opportunities for the district. This framework both sets the stage for the concept designs that will be developed as part of this planning process and sets an initial strategy for better connecting the district with downtown and other surrounding neighborhoods.

The existing conditions analysis includes a summary of the district's hotels and destinations, revealing a district rich in entertainment and hospitality options, yet lacking in the services and amenities needed for a livable neighborhood. The infrastructure needed to sustain these current uses manifests itself through existing parking, which occupies a large portion of the district's land area and interrupts the pedestrian experience within the district and at gateways. Unlike access to parking, which is plentiful and accessible from all parts of the district, open spaces are scattered and disconnected from their surroundings. Existing open spaces, such as Civic Center Plaza and Plaza of the Americas, are uncomfortable spaces and lack gathering areas.



## ATTRACTIONS & DESTINATIONS

The Arena District is home to destinations attracting Tulsans from the surrounding city, state, and region. For instance, the BOK Center draws nationally-recognized entertainment acts throughout the year, while the City-County Library offers a wide range of programming for people of all ages and backgrounds on a daily basis. Meanwhile, the Cox Business Center (CBC) is Tulsa's convention center and event space hosting meetings and events throughout the year. These three anchors draw in 1.8 Million visitors a year for concerts, conferences, events, and library services and programming. The Arena District and its businesses and hotels are thus heavily reliant on these anchors and their success, as is greater downtown.

There is market loss however. Based on conversations with area stakeholders, visitors coming into the district for events at the BOK Center generally drive and find parking near the facility, and tend to leave the district shortly after the event. The CBC, while bringing in more than 347,000 conventioners to the area on an annual basis, also relies on entertainment clusters outside of the district, such as the Blue Dome District, for restaurant and entertainment options. Consequently, the district struggles to provide quick meal options around events and does not attract visitors during non-event days and times. This is also due in part to a high concentration of civic uses that are only active during the workweek office hours, with the exception of the City-County Library. The latter attracts 2,000 users a day and is open for much of the workday and into the weekend, and offers valuable services and community gathering areas. It is also home to a Starbucks which is a popular and in-demand third place in the area.

Though benefiting from these strong anchors, the district also accommodates the supporting infrastructure necessary for

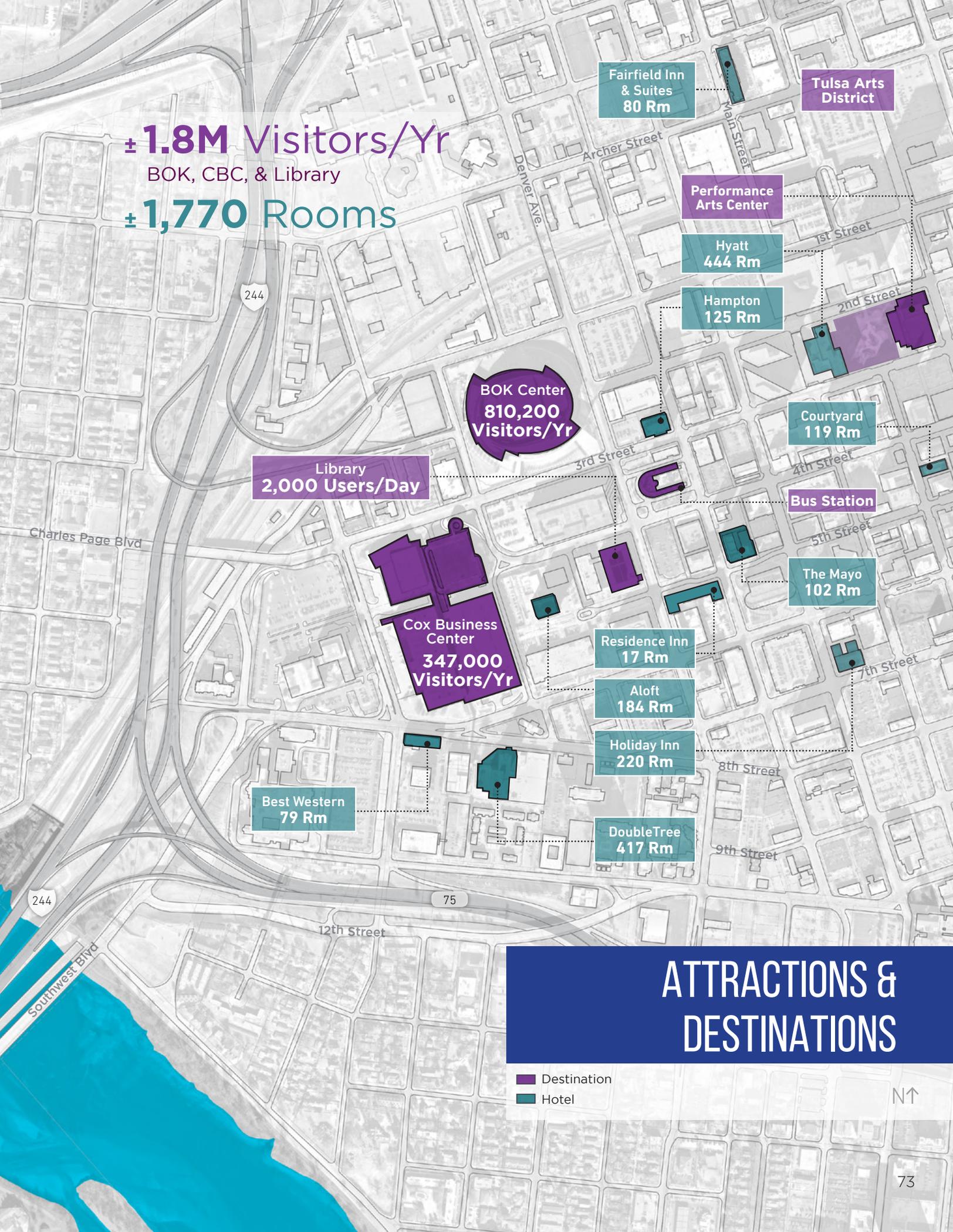
these large users. As such, the district's urban realm is characterized by surface parking, parking garages, and building support service and loading areas. These anchors offer some open spaces around their facilities, but they are largely decorative and under maintained with few activating uses during non-event times.

The number of events in the area has resulted in a robust hotel market, with recent and proposed hotels contributing 1,700 rooms within and near the district boundary. These include the Aloft Hotel, an adaptive-reuse project of the former City Hall Buildings, and the Hampton Inn and Suites, a new construction on a former parking lot block. The district is also home to the Mayo Hotel, a historic hotel closer to the central core featuring iconic art deco architecture. The two largest hotels are the DoubleTree - with 417 rooms, meeting space, garage, and connected to the Convention Center - and the Hyatt - with 444 rooms located in the Deco District. The hotel offerings in the district are therefore diverse, serving a variety of different visitor types within various price ranges. Additional hotel rooms are planned for this district, benefiting from strong destinations both within the district and within walking distance.

± 1.8M Visitors/Yr

BOK, CBC, & Library

± 1,770 Rooms



# ATTRACTIONS & DESTINATIONS

Destination  
Hotel

↑ N

73

# PARKING

Visitors, residents and employees in the Arena District have multiple options when deciding where to park. These options are often within a block of major destinations or where they work or live, and vary between on-street parking, surface lots, and garages. For downtown visitors, the Tulsa Parking Authority has garages with public parking, two of which are located within the district boundary. In addition, the Arena District has 383 on-street parking spaces, concentrated along the east side of the district. Most on-street spaces are currently along Cheyenne Avenue and Boulder Avenue and the east-west streets between these two corridors. On-street spaces are currently on timed meters, enforced during the workday (8:00 AM – 5:00 PM), and unenforced during weekday evenings, weekends and holidays. In January of 2018, city leadership proposed an overhaul of the on-street parking system, extending enforcement to 8:00 PM and charging for parking on Saturdays. Other upgrades will include converting all meters to multi-pay stations and adding a mobile pay technology.

Structured parking is available throughout the entire district, with garages containing daily public parking, monthly parking, and

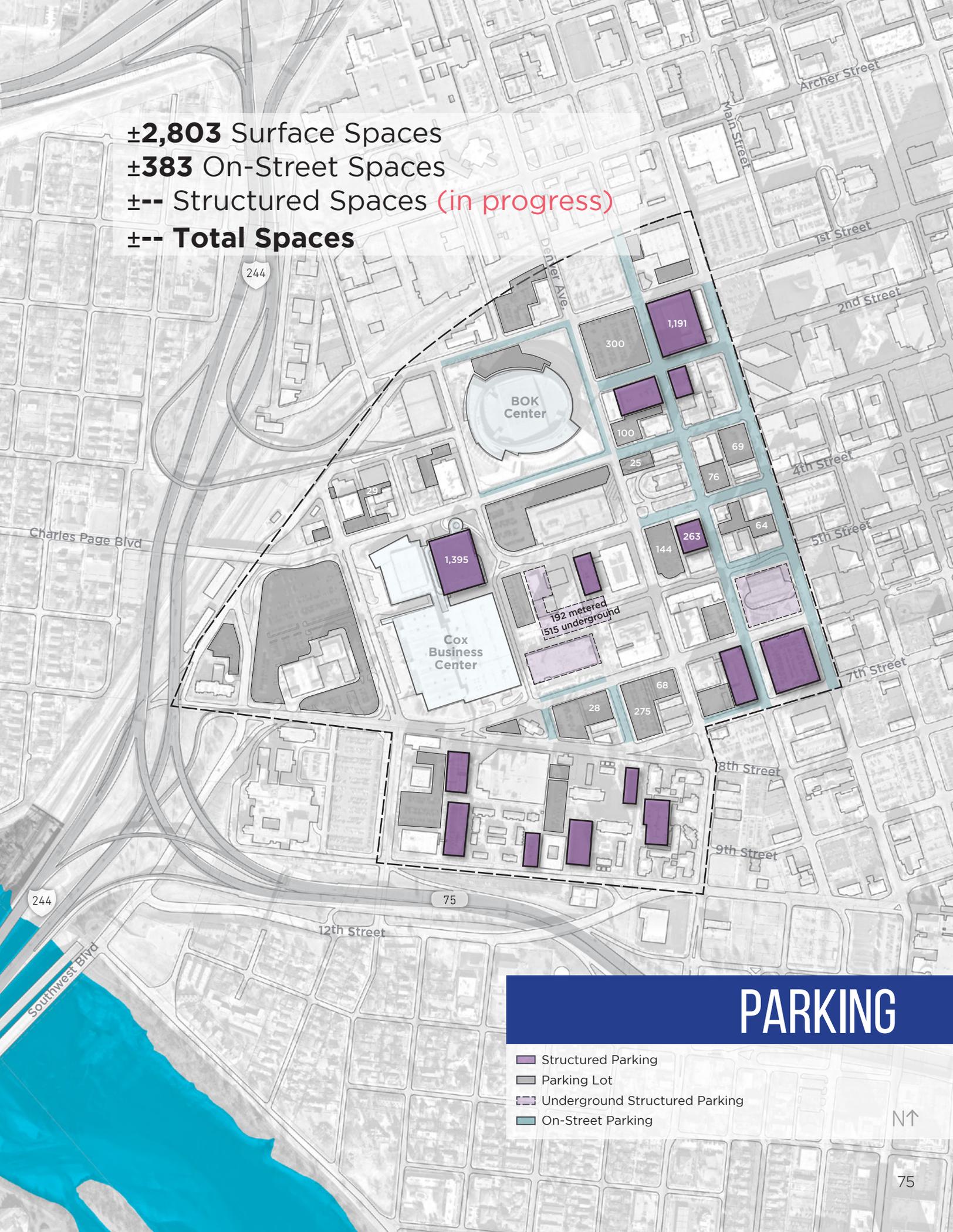
private parking. A total of approximately -- spaces are provided in parking structures above or below ground. Of these, approximately --- are publicly available.

Operated by the Tulsa Parking Authority, the Civic Center Parkade and the 100 West Garage provide public parking near the BOK Center, CBC, and the Page-Belcher Federal Building. Other garages with daily parking include the City-County Library Garage and the ONEOK Garage. A parking study was conducted by Walker Parking Consultants in 2015, assessing utilization rates and determining a location for a future downtown garage. In September of 2017, a 500-space parking garage was proposed by the City for the southeastern corner of Fourth and Main Streets, including 3,000 square feet for restaurant space. This garage will be within four to five blocks of the CBC and the BOK Center.

Surface parking lots are scattered throughout the entire Arena District, representing barriers to walkability and interruptions in the urban fabric. The 2,803 surface spaces in the district are generally privately-owned, with many available for daily or event paid parking. These surface lots are often located near important intersections, destinations, and gateways, holding potential redevelopment sites.



±**2,803** Surface Spaces  
 ±**383** On-Street Spaces  
 ±-- Structured Spaces (in progress)  
 ±-- **Total Spaces**



- Structured Parking
- Parking Lot
- Underground Structured Parking
- On-Street Parking



75

# OPEN SPACE

Though the Arena District boundary includes 165 Acres, only about six acres (3.5%) are dedicated to green space in the form of parks or plazas. The little green space currently in the district is generally uninviting and bare, with few opportunities for people to gather and enjoy.

The most centrally-located open space in the District is Civic Center Plaza, which begins at the terminus of 5th Street toward the Cox Business Center (CBC) entrance. The plaza, which is expected to undergo renovations as part of CBC improvements, allows for a pedestrian connection between Denver Avenue and the CBC, with direct access to the City-County Library and the Aloft Hotel. The current plaza lacks green space and shade, is inadequately activated by nearby institutions, and feels disconnected to surrounding buildings.

Further south at the fork of 7th and 8th streets, the Plaza of the Americas is an urban plaza reminiscent of 1970's urban design that features concrete seating and retaining walls. Though located at a significant gateway into the district, the partially-sunken plaza feels isolated from its urban surroundings and does not properly welcome visitors into the district.

Though not public parks, private green spaces throughout the district provide some gathering areas for the community. For instance, the landscaped greens and plazas around the BOK Center are actively used before and after events. As well, the recently-renovated private plaza fronting the ONEOK Building includes trees, benches, and planting areas.

Outside the district boundary, several public parks provide high-quality urban greens that feature seating areas, lawns, and public art, such as H.A. Chapman Green at Main and 6th Street, which hosts regular events and public art installations. North of the district in the Tulsa Arts

District, Guthrie Green is a great example of a modern downtown green space that serves as a catalytic driver of development. Opened in 2012 on a former commercial lot, Guthrie Green includes a performance space fronted by a by a large flexible lawn. The park is continuously activated through public events of all sizes, from small fitness gatherings to larger concerts and movies.



**3.5%** of study area is green | plaza space  
(public & private)



# OPEN SPACE

- Private
- Public

The Gathering Opening 2019



# LAND OWNERSHIP

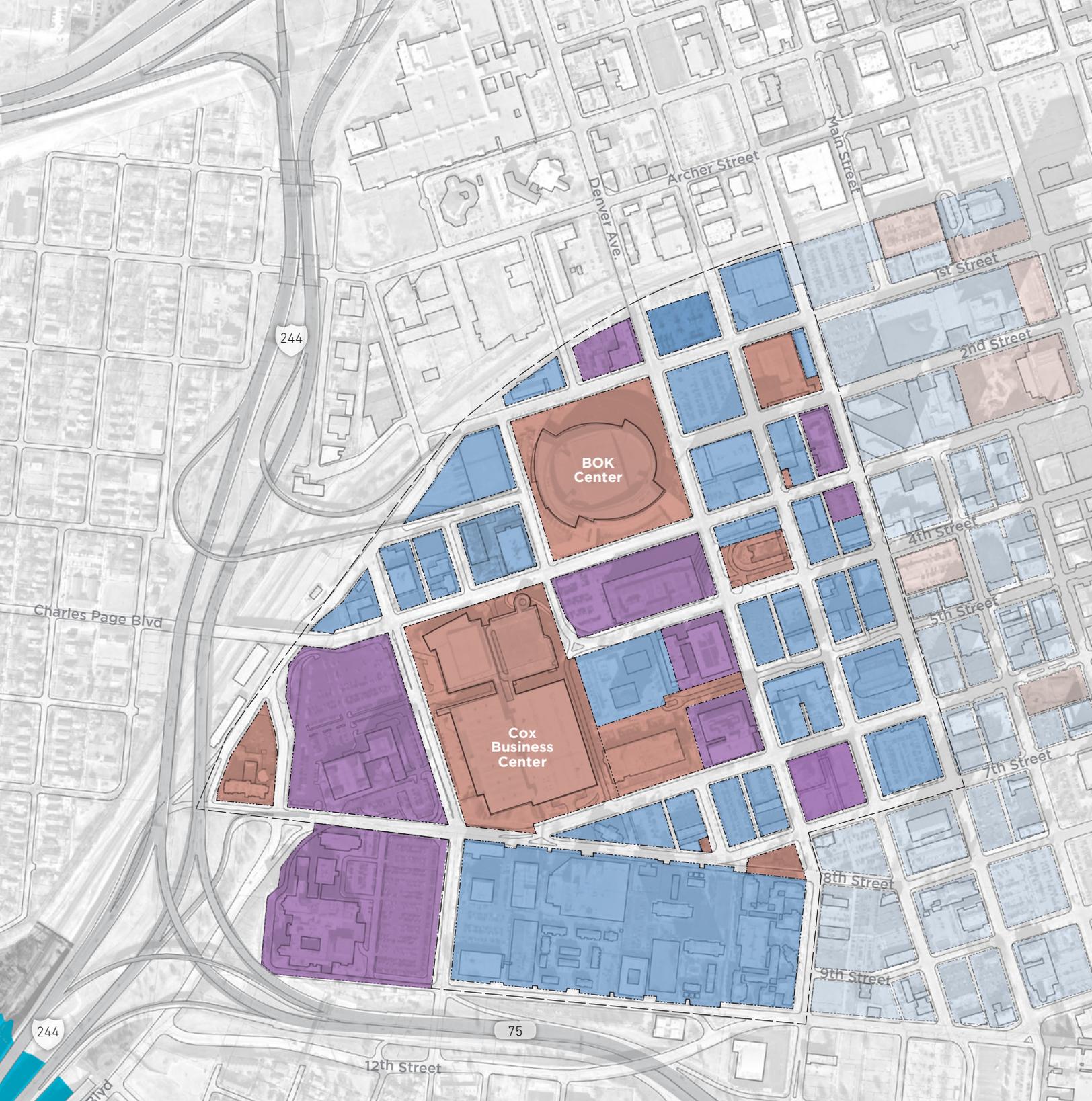
A majority of the Arena District's parcel land acreage (excluding right-of-way) is currently owned by public institutions, such as the City of Tulsa, the State of Oklahoma, and the U.S. Federal Government. The remaining land area is owned by a variety of land owners, which include large companies, developers, and residential condo residents. As seen in the map on the following page, city and other public owners are currently in control of parcels in the core of the district, while private owners control the majority of land along the south and the eastern edge with the Deco and Technology Districts.

Due to the prevalence of civic uses in the district, the City of Tulsa is the single largest landowners in the Arena District. The city currently owns one third of parcel land acreage within the study area boundary, including key properties in the heart of the district. These include the BOK Center block, the CBC and municipal court buildings, and 5th Street Plaza. Other land owners include Tulsa County, which owns the City-County Library, and the Metropolitan Tulsa Transit Authority, which

owns the Denver Avenue Station. The Page-Belcher Federal Building and block is owned by General Services Administration of the U.S. Federal Government. When totaled, public land owners control 58% of the parcel land acreage in the district, though ownership ranged across multiple levels of government and various agencies within the same institution.

Private owners in the district range between large and mid-size limited liability companies to single-owner residential condos. For instance, the block south of 7th Street, between Houston and Denver Avenues, is owned by a variety of private ownership entities that include hotels, non-profits and condo owners. Aside from residential property owners, large private landowners in the district include ONEOK, which owns the ONEOK Headquarters block and parking garage, and the Bank of Oklahoma, which owns the block northeast of the BOK center.





# LAND OWNERSHIP

- City Parcels
- County, State, or Federal Parcels
- Private Parcels



## EXISTING ZONING

Formally adopted in 2015 and effective January of 2016, the Tulsa Zoning Code regulates zoning and land division for the City of Tulsa. Parcels within the Arena District boundary are currently zoned “CBD: Central Business District.” According to the Tulsa Zoning Code, the intent of this district is to encourage diverse, high-intensity uses within the boundaries of the Inner Dispersal Loop. The code encourages a mixed-use environment for downtown, in which uses mutually benefit from proximity to each other and the services and transportation system available in Downtown Tulsa.

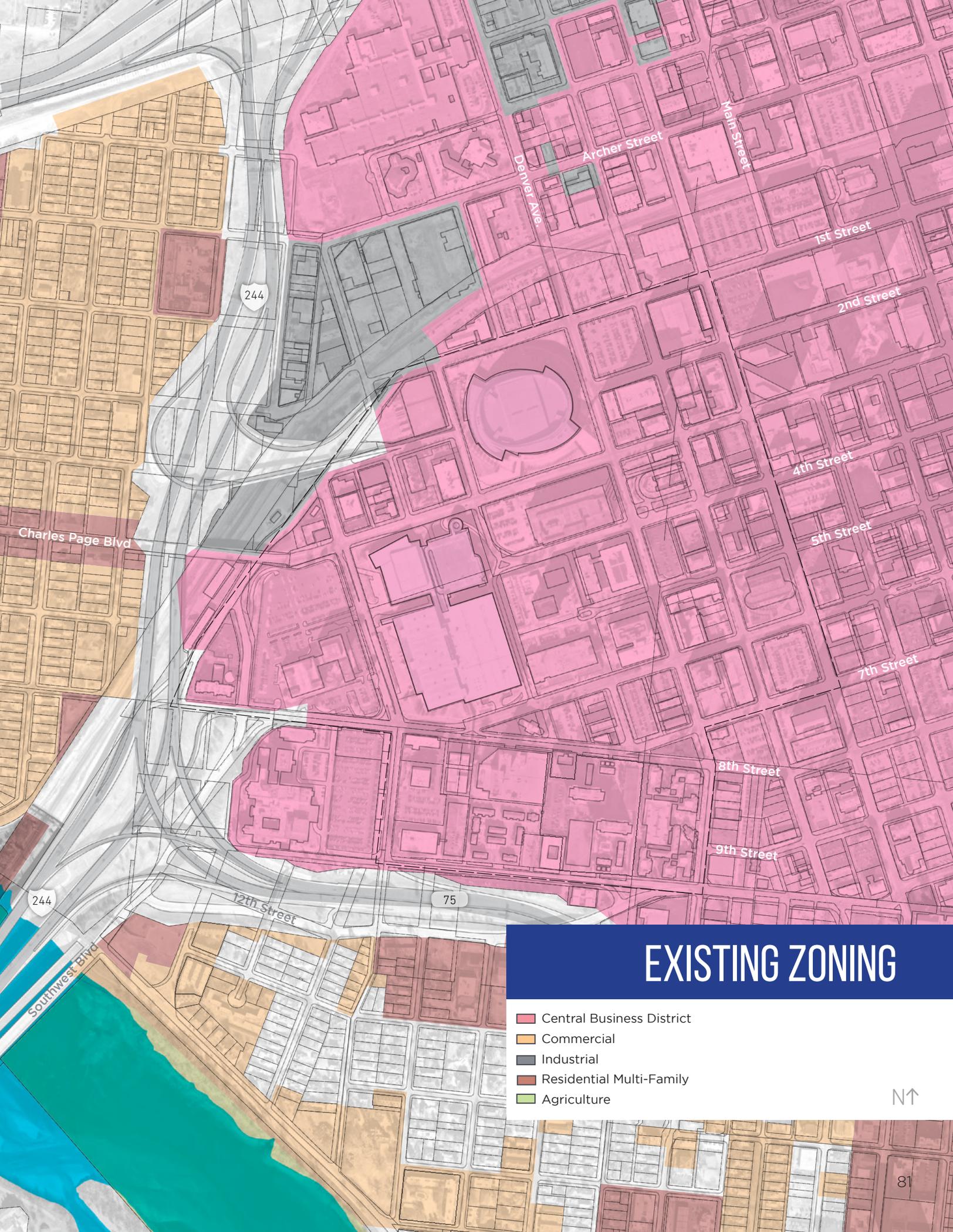
The CBD District does not regulate building height, floor area, land coverage, or set parking requirements, though it does include use regulations. For parcels zoned CBD, most residential and commercial service uses are permitted, while most industrial uses are prohibited. Supplemental uses, i.e. those requiring additional compliance, include homeless or treatment centers, assembly and entertainment commercial facilities, and governmental services.

Development occurring in the Arena District, including new construction and renovations, goes through a basic two-step zoning review process. First, City of Tulsa Permitting verifies whether the proposal meets the zoning standards for the site. Second, if standards are met, the permit is issued. Because the CBD zoning requirements are so permissive, most applicants meet the zoning standards. Variances may be sought for items not in compliance, though these tend to consist largely of signage issues.

The Arena District, unlike six other areas in the city, is not under a Historic Preservation Overlay District. As a result, development occurring in the district does not have to comply with design guidelines or

requirements for public hearings. Historic structures within the district, even those on the National Register, are not protected from demolition as long as public money is not used.

Current land uses in the district are reflective of the existing zoning, with all parcels in the district having a “Downtown” land use designation, except for Plaza of the Americas, which is considered a “Park and Open Space.” The land uses surrounding the district reflect the diverse neighborhoods located along the south and west sides of the district.



# EXISTING ZONING

- Central Business District
- Commercial
- Industrial
- Residential Multi-Family
- Agriculture



## LAND USE

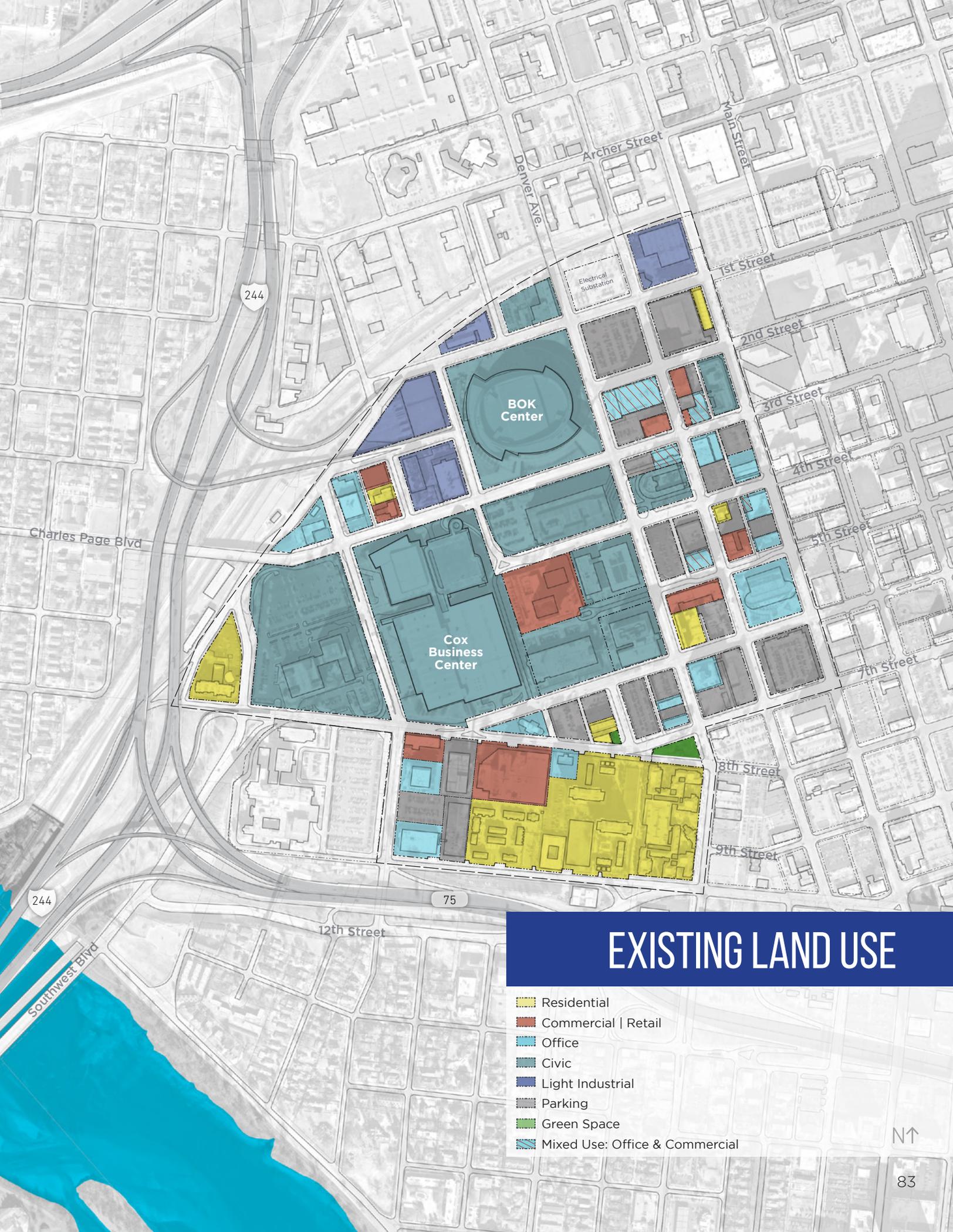
From a land use perspective, the Arena District is largely a civic and commercial district. Civic uses are prevalent in the district's central core around 5th Street Plaza, with the exception of the Aloft Hotel property. Surrounding this civic core are various land uses that take on some of the qualities and typologies of the neighborhoods that surround the district.

Government buildings were constructed in the 1960's as part of urban renewal, centered around the elevated Civic Center Plaza. This includes the original Convention Center and Assembly Hall, the City-County Library, City Hall (now Aloft Hotel), the Page-Belcher Federal Building, and the Municipal Court Building. This large grouping of government buildings creates a superblock adjacent to the south side of the BOK Center arena. Further north, the BOK Center is surrounded on the north and west sides by legacy industrial and warehouse buildings that take advantage of the railroad tracks and convenient highway access. East of the BOK Center, parking lots and garages fill entire city blocks, though some of these have seen recent commercial infill with the construction of the Hampton Inn and Suites and the One Place office building.

South of 7th Street, the district takes on a different character altogether as residential uses fill the majority of a 24-acre superblock. In this block, the Central Park Condominiums, Renaissance Uptown, and Riverbend Gardens contain most of the Arena District's existing residential units. These three developments are nonetheless suburban in nature, featuring large setbacks from the street, surface parking along the edges, and inward-facing residential units facing private courtyards. At the intersection of 7th Street and Houston Avenue, two hotels take advantage of the close proximity to the CBC, though these do not activate the pedestrian scale and instead connect to the CBC through an elevated walkway.

On the eastern side of the district, the blocks between Denver and Boulder Avenues have traits more in line with the downtown districts east of the Arena District. These blocks, which are sized as standard 320' by 320' urban blocks following the downtown street grid, are mixed-use and contain office, civic, retail and residential uses. However, on the northern and southern sides, structured and surface parking fill entire city blocks.





# EXISTING LAND USE

- Residential
- Commercial | Retail
- Office
- Civic
- Light Industrial
- Parking
- Green Space
- Mixed Use: Office & Commercial

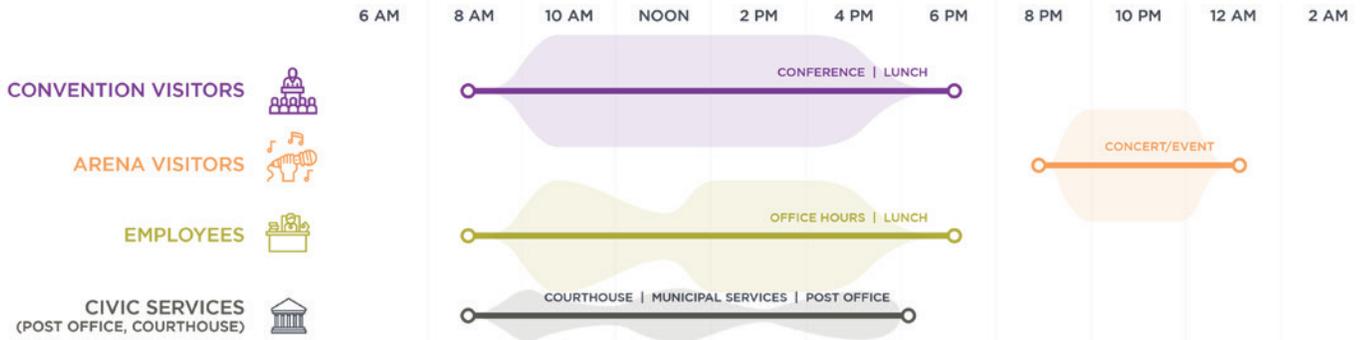


## KEY LAND USE TAKEAWAYS

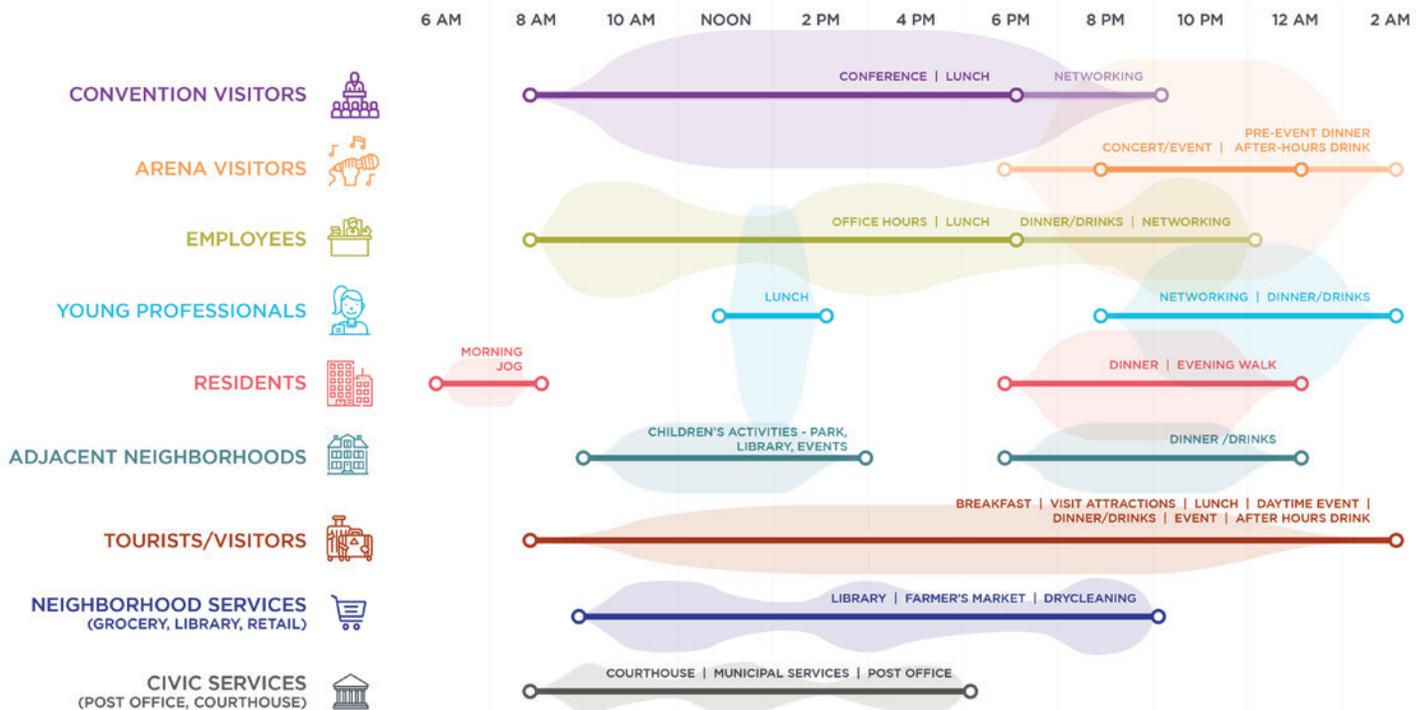
- **The Arena District study area is divided between starkly different groups of land use areas that do not relate well with each other.**
  - » At the heart is a civic core on large blocks, though even these uses do not relate well with each other ranging from visitor oriented (BOK, CBC, Library) to largely insulated/protected government uses (post office, courts, state offices).
  - » Downtown commercial uses on regular-sized blocks lie to the east.
  - » Unconnected residential development of various scales lies on a superblock to the south.
  - » Original industrial uses lie to the north along the railroad tracks.
  - » Generally surface parking lots separate the civic core from downtown and the residential superblock.
- **Reposition sites to more effectively contribute to the District.**
  - » The Page Belcher Federal Building is oversized and underutilized for its location.
  - » The Oklahoma State Building is underutilized and isolated.
  - » Surface parking lots break up the vitality of the District, but parking must be addressed with new development.
  - » The Civic 5th Street Plaza must be more of an asset.
  - » The Plaza of Americas is not successful in its current form.
  - » The Denver Avenue Transit Center generates a negative atmosphere at times that detracts from surrounding uses – this needs to be addressed.
- **Flexible, attractive, usable green civic space is lacking in the District.**
  - » Attractively designed and landscaped civic space is a fundamental asset for successful districts.
  - » Strategic placement of such space can enhance existing uses and catalyze new investment.
- **Design guidelines and project review are critical to protecting/securing needed public investment and ensuring private development is contributing to the overall vision of the District.**
  - » Significant public investment is needed within the District.
  - » This public investment should be protected and catalyzed by appropriate private investment.
  - » To ensure this is achieved, design guidelines/standards are necessary with accompanied oversight, review and approval.
  - » Public-private partnerships will be needed to realize the Arena District Master Plan.
- **Create a vibrant 18-hour neighborhood that:**
  - » Adds residential uses to support retail and civic spaces that also serve the visitor experience;
  - » Gives residents, workers, and visitors a reason to frequent the district on a daily basis by providing desired amenities and needed services;
  - » Provides a retail and entertainment experience that attracts people to come to the district before an event and stay afterward;
  - » Enables the expansion of convention center and hospitality uses to enhance competitiveness;
  - » Offers a wide mix of uses to increase day-to-day activity;
  - » Serves current and future parking needs efficiently and effectively while allowing for new development and improved walkability; and
  - » Engages the community through a series of well-connected, activated open spaces.



## EXISTING USER GROUPS



## POTENTIAL: 18 HOUR NEIGHBORHOOD





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# **004 | CONNECTIONS ASSESSMENT**

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# CHAPTER FOUR

# CONNECTIONS ASSESSMENT

## INTRODUCTION

Through conversations with stakeholders and members of the Tulsa community, a common thread quickly emerged – the Arena District is not a walkable part of downtown. This assessment unpackages the reasons and issues that contribute to the district’s lack of walkable streets, from an overall district-level perspective to a street-level perspective. This analysis informs a draft connectivity framework, introduced in the next chapter, which outlines strategies to make this a walkable district that is well connected to downtown.

At the macro level, issues affecting the entire district, such as superblock development patterns, disconnected streets, transit access, and street directionality, contribute to auto-centric streets and inactive ground-level uses. At a micro level, current pedestrian conditions, such as missing sidewalks, lack of pedestrian crossings, and poor pedestrian amenities, result in streets that are not conducive to a vibrant pedestrian realm. Together, these forces affect how people visiting the district decide to move through its streets, and lead to a perception that the district is best traveled using an automobile.

Though within a 15-minute walkshed to downtown and the riverfront, the district feels isolated and disconnected – members of the community have described the district as an “island” within downtown. The wide one-way streets between the Arena District and downtown create barriers to walkability, and lead to a perceived greater distance to the district’s destinations. In addition, its location along downtown’s southeastern edge, framed by two highways, results in physical and topographical barriers between the district and the Arkansas River corridor’s trail and open space network. Addressing these connectivity issues can ensure that the Arena District seamlessly integrates with the downtown street grid and provides opportunities for riverfront access.



**BOK CENTER**

BOK CENTER



1110

Discover  
Tulsa

Discover  
Tulsa

## PEDESTRIAN CONDITIONS

Unlike driving, the pedestrian experience is highly influenced by the environment on and adjacent to sidewalks. When people walk, they are in the elements and moving more slowly – comfort, safety, and details matter. Improving pedestrian connectivity is a critical goal of this plan, so it is important to understand the current pedestrian experience within the District.

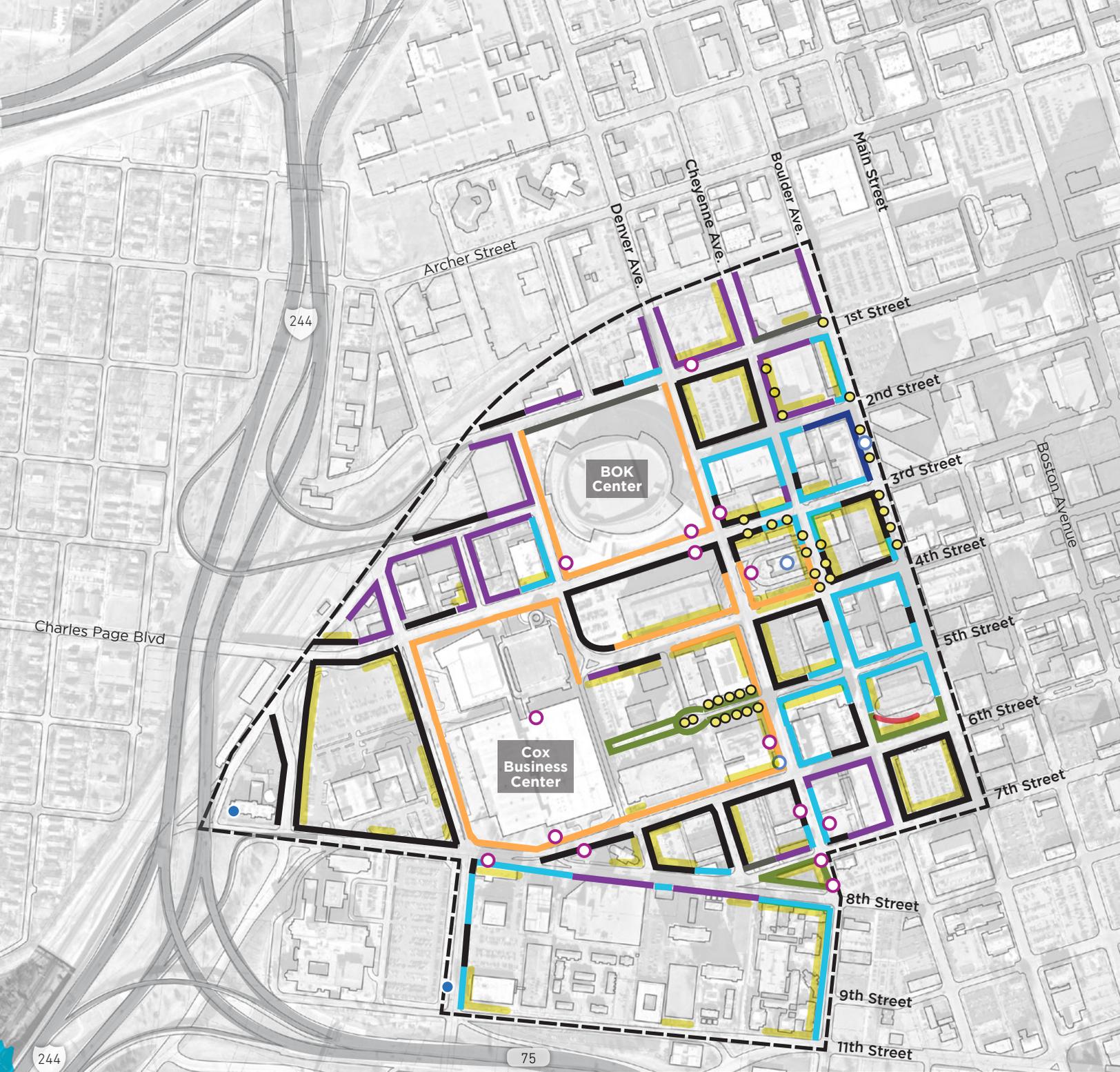
Obvious things that make the pedestrian experience better and safer are level sidewalks in good condition, sidewalks that are wide enough for two couples to pass each other, clearly marked crosswalks, and pedestrian scale street lighting and building lighting. Street trees are also an important component of complete streets and even more important in sunny, hot environments like Tulsa. Having shade trees regularly spaced either along the curb edge or behind the sidewalk makes walking and or waiting outside tolerable. They are shady in the summer, have color in the autumn, and are bare in the winter to let sun shine through to warm walkers in the cold. Where trees aren't possible, shade structures, canopies, and even building shadows should be considered.

The built environment is also critical to the pedestrian experience. People are willing and interested to walk farther when the walking experience is interesting and enjoyable. This means walking next to buildings that have storefronts, as well as windows, doors, and entryways. It means areas of outdoor seating, plazas, and public art. Things that detract and discourage walkability are blank walls, surface parking lots, tall fencing, and empty or inactive buildings. Wayfinding and signage that indicates places of interest and destinations, including walkable distances, are very helpful in promoting walking. Finally, other people walking on the streets makes walking more interesting.

In the Arena District, there are a number of streets that have one side of the street or one half of a block that is inviting to the pedestrian, but then the experience is

interrupted. The best sections are close to the downtown, where many of the historic buildings exist. In many areas of the District, surface parking breaks up the pedestrian experience. There is almost no street that offers a complete pedestrian environment on both sides of the street for its length through the District. The closest is 5th Street from the Library east to downtown, where new city investment has provided wide sidewalks, lighting, landscaping, and nice materials along blocks with active buildings and plazas.

While the CBC is an important destination, much of the convention center consists of blank walls or parking structure that does not encourage or invite the pedestrian. The best area is the new northwest addition along 3rd Street, where the glass façade and landscaping make the structure welcoming. Similarly, the BOK Center is beautiful to look at and has wide and inviting sidewalks and plazas, but the trees and earth berms are more of an architectural element and don't serve as street trees that shade the sidewalks along the streets.



# FRONTAGE & FIXTURES

- Civic/Non-Active
- Parking Lot/Garage
- Active Frontage
- Non-active frontage
- Public Space
- Ped. Lighting
- Seating
- Wayfinding Signage
- Shade Structure
- Street Trees



## BLOCK SIZE & WALKABILITY

A key ingredient to success in any urban neighborhood is walkability. Walkability generally consists of two aspects: 1) Pedestrian scale, walkable block sizes that feel comfortable and safe, and 2) Amenities and destinations that people want to walk to.

Tulsa is fortunate enough to have great pedestrian scale, walkable block sizes throughout the CBD (320 ft. x 320 ft.). This size allows for active and intriguing ground-floor uses without creating an unreasonable amount of street crossings.

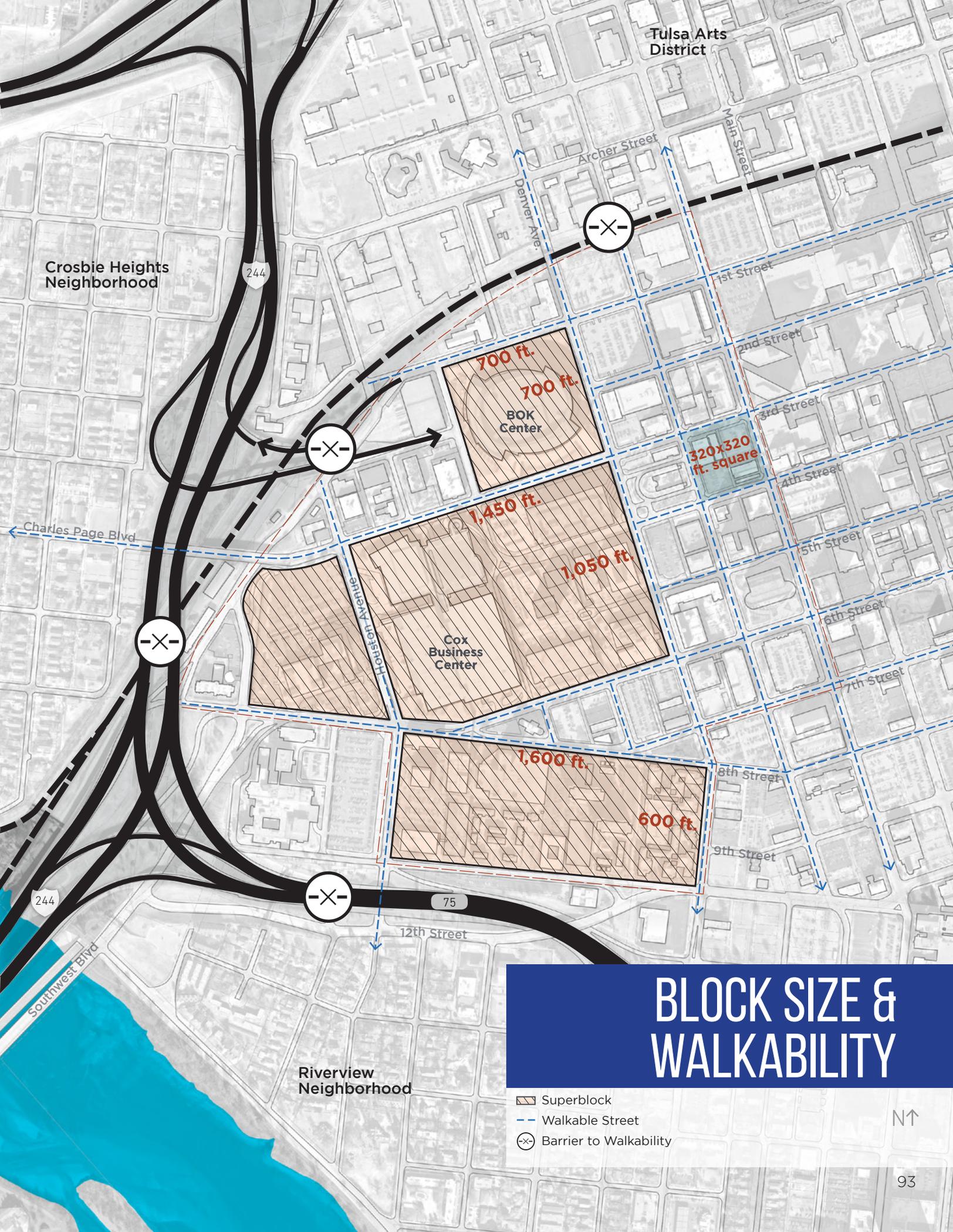
An important step in connecting the blocks west of Denver Avenue to the rest of downtown is creating that same type of pedestrian friendly block size, which does not necessarily require new vehicular connections. Currently, the area west of Denver Avenue mostly consists of large superblocks where walkability is hindered by large structures, private or fenced-in land, or large surface parking lots.

Along Denver Avenue, between 1st and 3rd Streets, the BOK Center occupies about 50% of a 490,000 SF block with no activated spaces around the block edges. Also along Denver Avenue, between 3rd and 6th Streets, a large superblock exists consisting almost entirely of civic uses and a 310,000 SF convention center along Houston Avenue. This block has limited pedestrian access points, various structural grade changes, limited wayfinding, and a fence around the large Page Belcher block. A large, 960,000 SF superblock makes up the south end of the district, containing hotel and residential uses. This block feels private in nature and does not provide any logical pedestrian access points between Denver and Houston Avenue.

The north, west, and south edges of the district are confined by Interstate 244, Highway 75, and the existing rail line. This existing infrastructure currently creates a physical and psychological barrier

between the district and the surrounding neighborhoods. Charles Page Boulevard provides the only pedestrian access point between the district and the Crosbie Heights neighborhood to the west, though this connection lacks active street frontage uses within the district and leads to a long vehicular bridge under Interstate 244. Houston Avenue and Southwest Boulevard provide the only access points from the district to the Riverview Neighborhood to the south. These connections are unactivated and don't feel safe or inviting to people walking or biking.

It is important to begin breaking these blocks up to extend the walkable, pedestrian friendly grid from the CBD into the district. This will establish the base for a walkable neighborhood and allow for more opportunities to activate the district through ground-floor uses and public open space.



Tulsa Arts District

Crosbie Heights Neighborhood

244

Denver Ave

Archer Street

Main Street

1st Street

2nd Street

3rd Street

4th Street

5th Street

6th Street

7th Street

8th Street

9th Street

12th Street

75

Charles Page Blvd

Cherokee Avenue

320x320 ft. square

700 ft.

700 ft.

1,450 ft.

1,050 ft.

1,600 ft.

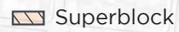
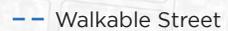
600 ft.

BOK Center

Cox Business Center

Riverview Neighborhood

# BLOCK SIZE & WALKABILITY

-  Superblock
-  Walkable Street
-  Barrier to Walkability

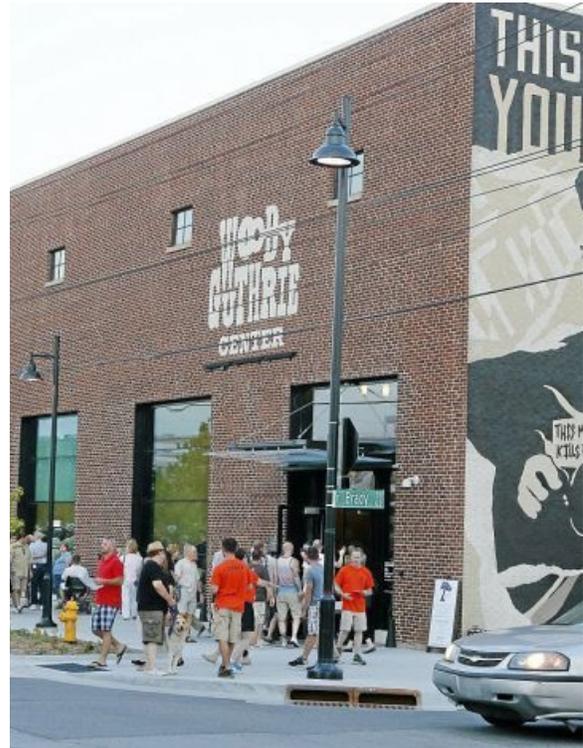
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## WALKING DISTANCES

The second element of a walkable urban neighborhood, as previously mentioned, is providing destinations and amenities that people want to walk to. This includes destinations and amenities for both visitors and local residents.

Using the library as a central reference point, users in the district can walk to the core of the CBD in 5-minutes, and the adjacent Tulsa Arts & Blue Dome Districts are a 10-minute walk away. With this proximity and the opportunity to provide pedestrian scale blocks, active ground-floors with points of interest will give people a reason to walk through and from the Arena District to experience other areas of downtown. This is especially important for event attendees from the BOK Center and the Cox Business Center who would otherwise return to their cars and head back out of downtown.

The Tulsa Arts District and Blue Dome District are thriving urban neighborhoods in downtown Tulsa that offer unique experiences not found in the Arena District. Due to a lack of walkable connectivity in the current condition, it is easier for visitors to drive to these destination neighborhoods. For instance, visitors attending an event at the BOK Center often drive to the Tulsa Arts District for dinner, instead of parking once and walking between these two destinations. As seen on the map to the right, these two districts are within a walkable 10-minute walkshed, though this walk is impeded by auto-centric streets, railroad tracks, and lack of shade. The Arena District has an opportunity to tie into these areas while still serving as it's own neighborhood with large entertainment draws and points of interest.



**Tulsa Arts District**  
*Source: ORU Oracle*



**Blue Dome District**  
*Source: Oklahoma Magazine & Blue Dome Arts Festival*



Crosbie Heights Neighborhood

Tulsa Arts District

10-Minute Walk

Blue Dome District

BOK Center

5-Minute Walk

Cox Business Center

Library

Charles Page Blvd

244

2nd Street

3rd Street

4th Street

5th Street

6th Street

7th Street

8th Street

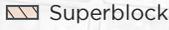
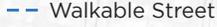
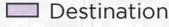
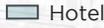
Hobson Avenue

75

12th Street

Riverview Neighborhood

# WALKING DISTANCES

-  Superblock
-  Walkable Street
-  Destination
-  Hotel
-  Restaurant Cluster

↑ N

95

## TRANSIT

The Arena District is currently served by 24 bus lines operated by Metropolitan Tulsa Transit Authority (Tulsa Transit), and is home to the Denver Avenue Station – the system’s central hub. Transit coverage in the district is inconsistent, with the eastern section of the district having a greater number of bus lines and stops than the western portion.

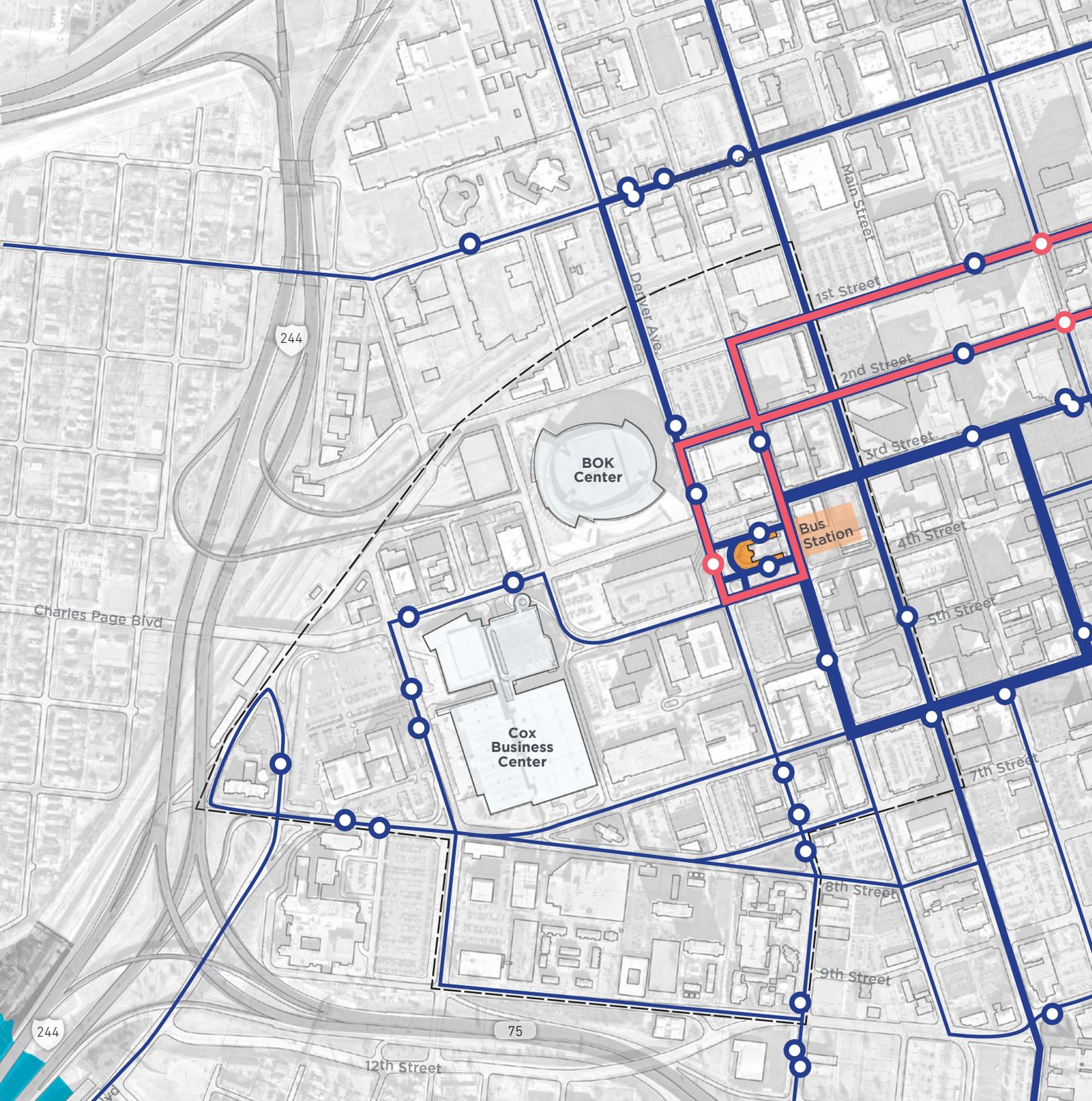
Located across from the Page Belcher Federal Building, the Denver Avenue Station has served as a major hub and transfer point since its opening in 1998. As the largest of two hubs in the network, the station serves transit riders for much of the day and evening and contains indoor and outdoor facilities. The station contains distinctive allusions to art deco architecture, though lacks visibility from surrounding blocks due to drop-off areas and landscaped setbacks. Buses currently access the station from Cheyenne Avenue and 4th Street, making a one-way loop around the station. Its location within downtown is at a crucial transition between the Deco District and the Arena District. Currently, the station and its immediate surroundings create a barrier in walkability between both districts. This is due to both the station’s layout within the block, as well as a perception of safety surrounding the

station, as expressed by stakeholders and public meeting attendants.

Aside from lines converging at the Denver Avenue Station, most bus stops in the district are located along the eastern portion of the study area closest to the Deco District, except for bus stops on Denver Avenue, West 3rd Street and West 7th Street. Destinations within the district, such as the BOK Center, Cox Business Center, and the City-County Library are well served with transit stops within a walkable distance, but are not well interconnected as they are located on bus lines into and out of downtown rather than on a circulator route around downtown that links them all.

Future additions to the transit network include the Peoria Avenue Bus Rapid Transit (BRT), which is funded by Vision Tulsa and is scheduled to begin operating in 2019. The Peoria BRT, branded as Aero in reference to Tulsa’s aerospace industry, will serve downtown along 1st and 2nd Streets, making a turn at the Denver Avenue Station. Once finalized, this line is expected to serve the 1 in 7 Tulsa residents living within a 10-mile walk of the Peoria Avenue corridor, and will connect the Arena District with approximately one-fifth of Tulsa’s jobs.





# TRANSIT

- Bus Line
- Bus Stop
- Peoria BRT Line
- Peoria BRT Stop



# KEY CONNECTIVITY TAKEAWAYS

- **The superblocks create critical streets of emphasis that must be well-designed within the study area**
  - » Denver Avenue as the primary north-south street and edge to the Downtown street grid.
  - » 3rd Street and 6th Streets are the primary east-west streets.
  - » 5th Street is a signature connection.
- **The IDL freeway system and railroad tracks create barriers between neighborhoods and Downtown. (Overcome the RR/freeway barrier – make connections seamless)**
  - » There are few connections across the IDL between the District and the Crosbie Heights (1 underpass) & Riverview (2 underpasses, 1 overpass) neighborhoods and these connections are not inviting to people walking or biking.
  - » There are three connections between the District and the north, two at-grade crossings and one underpass – none of which are inviting for people walking or biking.
  - » Reduce these as barriers and make the connections more seamless between the district and the riverfront and adjacent neighborhoods.
- **Bring the CBD to the district and the district to the CBD by:**
  - » Breaking down the superblock to re-establish the street grid.
- **Build streets for people and emphasize the pedestrian experience. This means creating streets that:**
  - » Are inviting, safe, and comfortable for pedestrians with wide level sidewalks, street trees for shade and aesthetics, pedestrian-scale lighting, active and interesting building fronts, fewer and screened surface parking lots
  - » Are inviting and safe for people riding bikes, including the incorporation of bike lanes and cycle tracks; and
    - » Pedestrian-scale wayfinding.
    - » Having great streets that serve as linear parks will improve connectivity, break down the scale of the District, and help tie the different land uses together.
- **Improve the desirability and success of uses within the district by incorporating on-street parking, identifying publicly-available parking (& times), consolidating parking into structures, and improving wayfinding.**
- **There is little sense of arrival to the district, and to downtown from the west.**
  - » The arrival experience is important considering the visitor destinations located within the District.
  - » Gateways must be strengthened.
  - » Streets and buildings along gateway entries need to be improved (i.e. signature streets and fewer blank walls).
- **Enhance transit access to improve connectivity between the Arena District and surrounding districts and de-emphasize the reliance on vehicles for trips.**
  - » An important goal is connecting the hospitality, event, and convention destinations with the existing Tulsa entertainment districts (Tulsa Arts, Blue Dome, Greenwood) to the benefit of all.
  - » The Gathering Place will be a main attraction and providing transit access from the District will aid the hospitality and convention industry and provide additional connectivity to the River.
  - » Transit stops should serve the hotel locations as well as the BOK and COX. This service may consist of a downtown circulator and/or specialized shuttle service.

COLUMBUS  
EATS  
DI  
COLUMBUS  
COLUMBUS  
GRILLE  
HOMEGROWN  
MARKET  
\*  
CBUS  
TAP ROOM  
\*  
CRIMSON CUP

A man in a light blue shirt and dark trousers is walking on the sidewalk.

A woman in a red shirt and white shorts is walking on the sidewalk.

ART COLU  
MAKES A  
COLUMBU  
PIZZA COLU

MARTINI

OPEN



