



# Partners

**TWICE THE BENEFIT EVENT**

**"Leveling Up Your Leadership"**

**STR 2024 Industry  
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**RIVERWIND  
HOTEL**



**The Skirvin Hilton**  
Oklahoma City



Luke Veneskey  
STR





# OHLA Industry Update

Oklahoma City, OK, September 6, 2023







**STR is the leader in data benchmarking, analytics and marketplace insights for the global hospitality industry.**

**38**

years of  
partnership with  
the industry

**77K**

participating  
hotels around  
the world

**10M**

Rooms in our  
global sample

**78%**

of branded  
rooms globally



The most comprehensive  
commercial real estate data.

The most influential network of  
CRE professionals.

**\$3B**

invested in research  
and technology

**36**

years of  
experience

**5,500**

team members

**192K**

CoStar users

**29**

brands

**1.9B**

visitors to our  
websites annually



# STR Benchmarking Value Proposition

STR Benchmarking is the **transformative** hotel industry solution that delivers the **property- and portfolio-level insights** needed to make **smart, real-time decisions** and optimize strategies across entire enterprises. Powered by CoStar technology, STR Benchmarking is **the industry's most comprehensive market share product**, featuring top-line historical metrics, detailed analytics and visualizations, forward-looking data, and P&L intelligence.

Combined with the commercial real estate intelligence of CoStar, STR Benchmarking provides visibility into the full hotel lifecycle from **acquisition** to **operations** to **divestment**.



# Overheard at HDC



Normalization

Been Drunk on  
Leisure Biz

Understanding  
New Normal

ADR Has  
Softened

*Everything is going  
to be OK.*

Group Biz  
is Alive

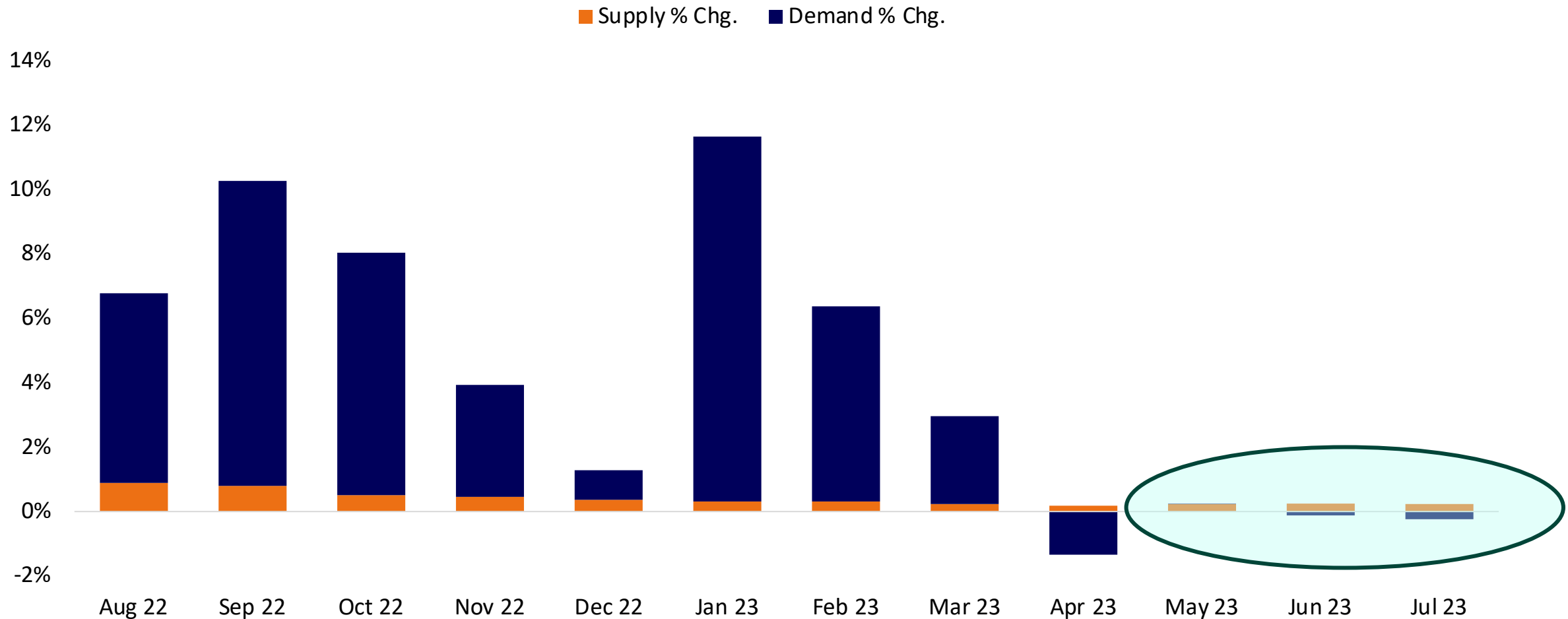
RevPAR Growth

Market Fatigue



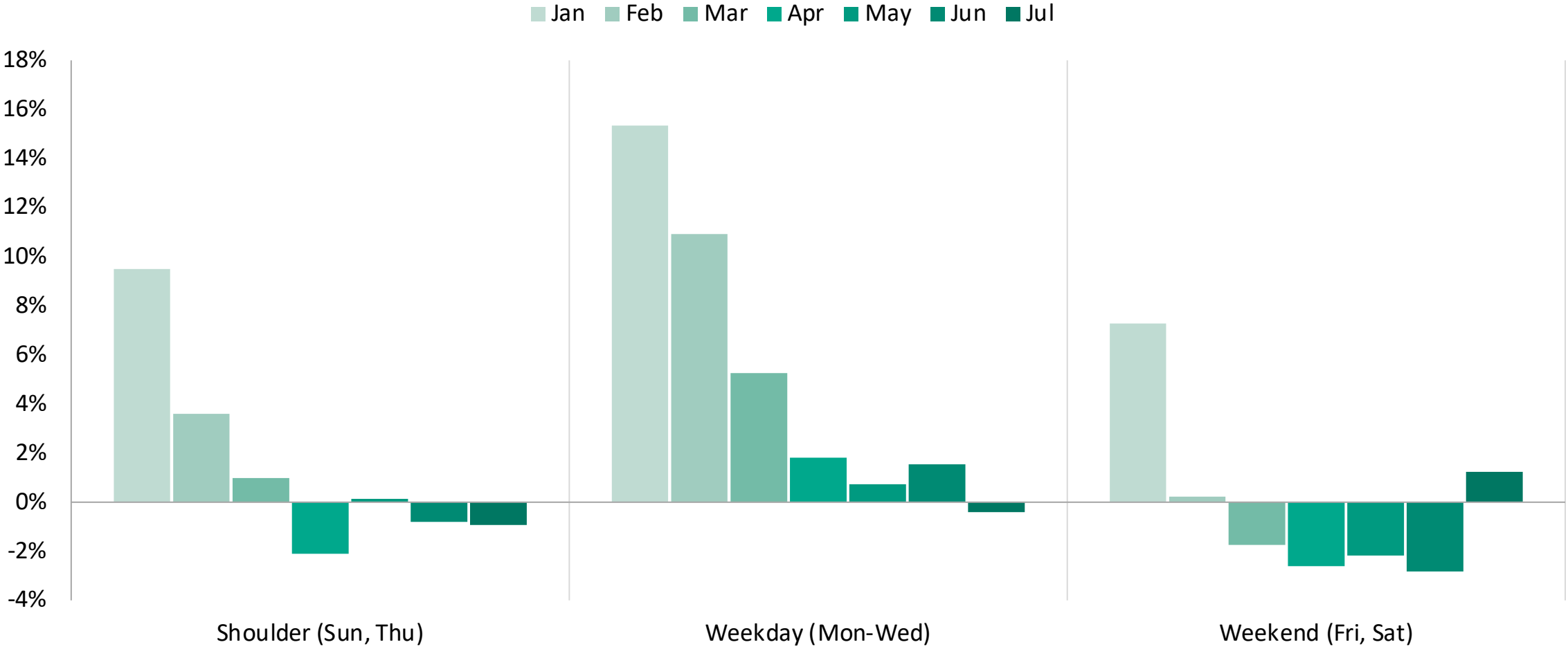
# Modest supply, no demand

US, supply and demand % change YoY, Aug 2022 – Jul 2023



# July breaks the trend

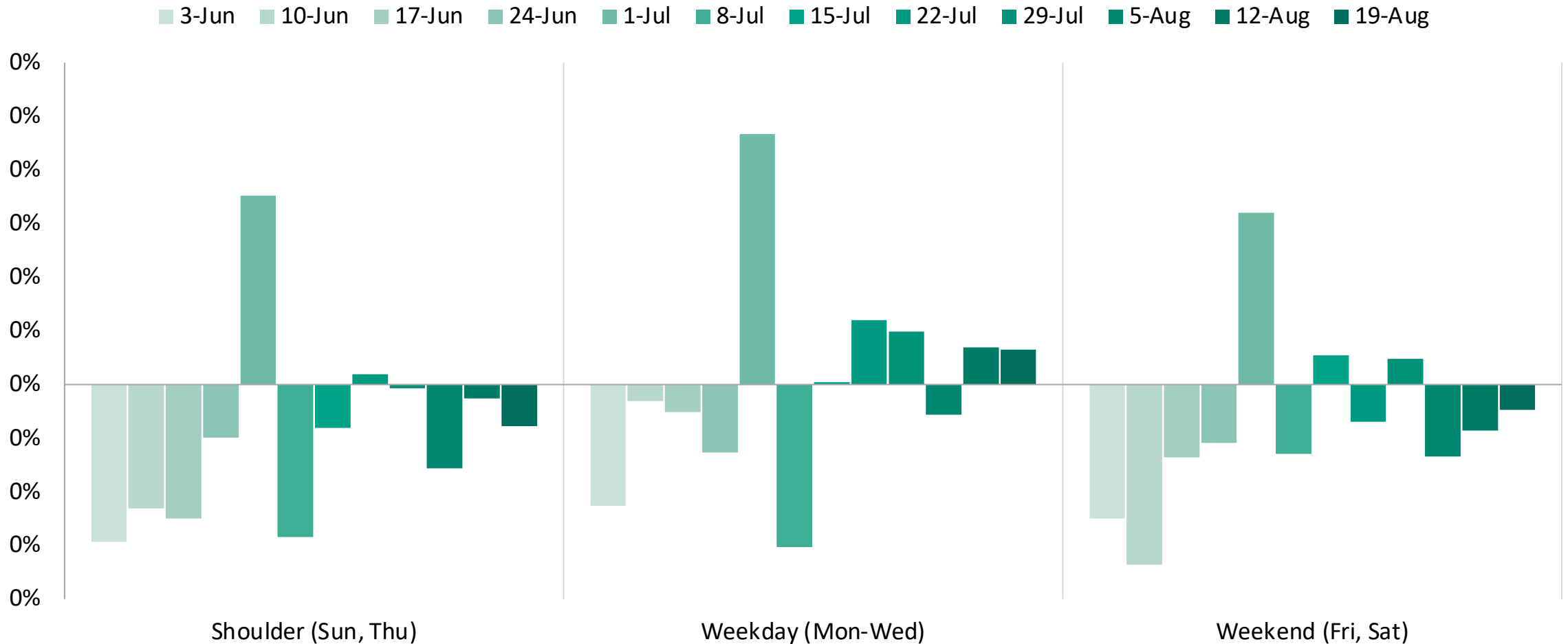
US, occupancy % change YoY, Jan 2023 – Jul 2023





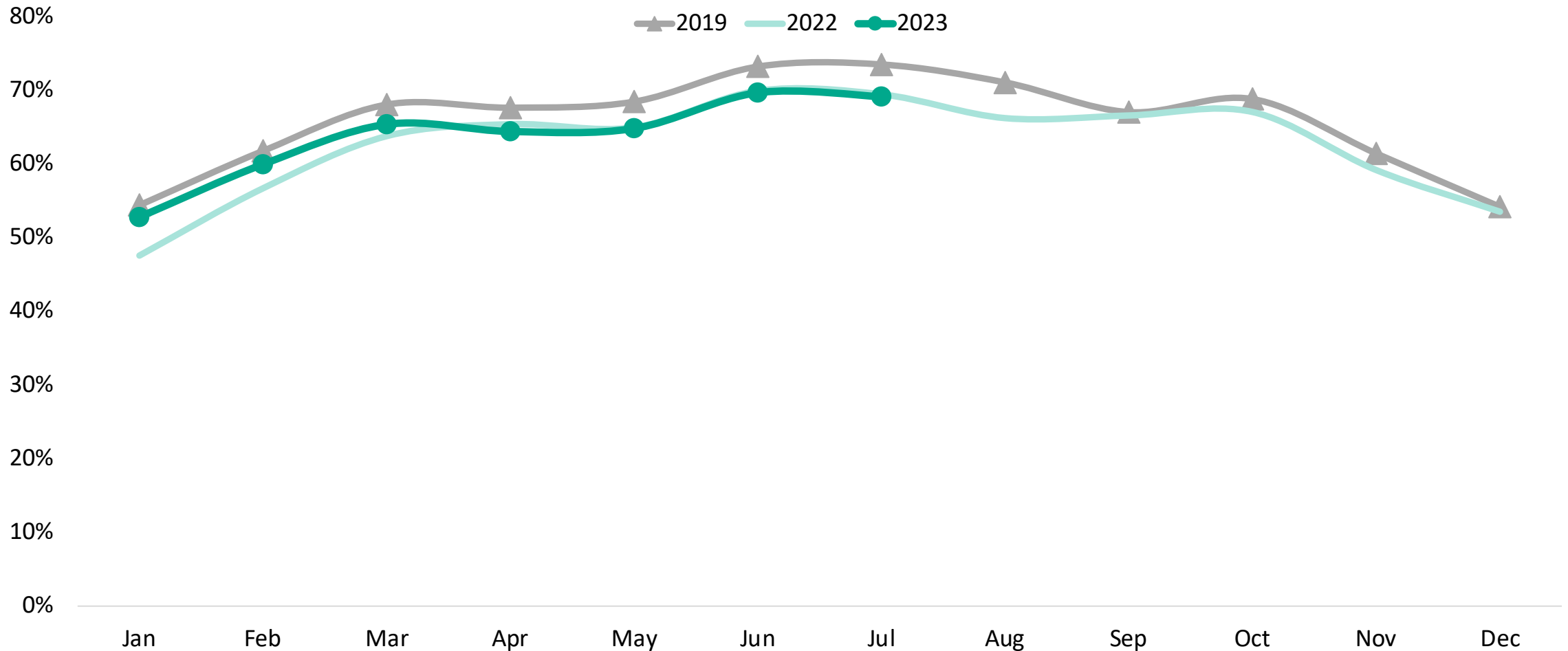
# Because 4<sup>th</sup> of July moved from Monday to Tuesday

US, occupancy % change YoY, 3 Jun – 19 Aug 2023



# Returning to Normal; Overlapping Last Year's Trendline

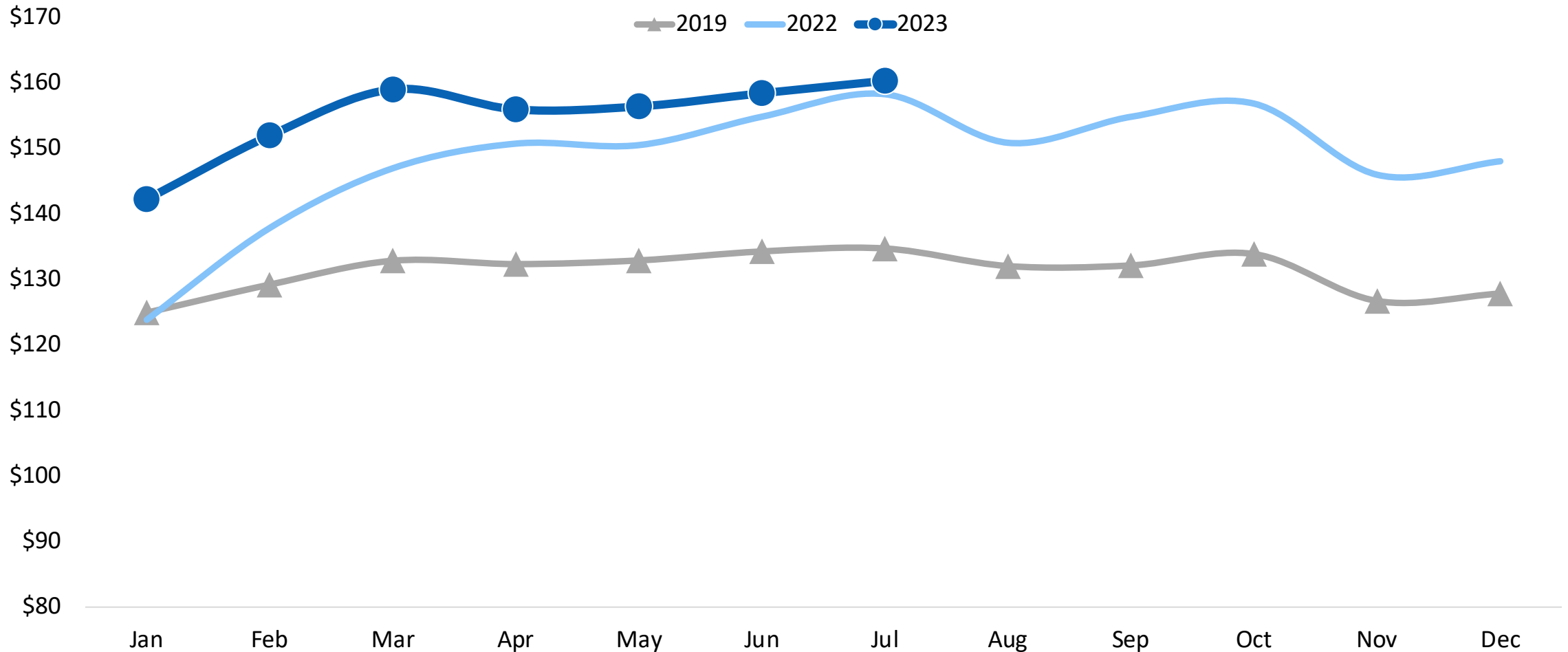
Total US, monthly occupancy, 2019, 2022, 2023





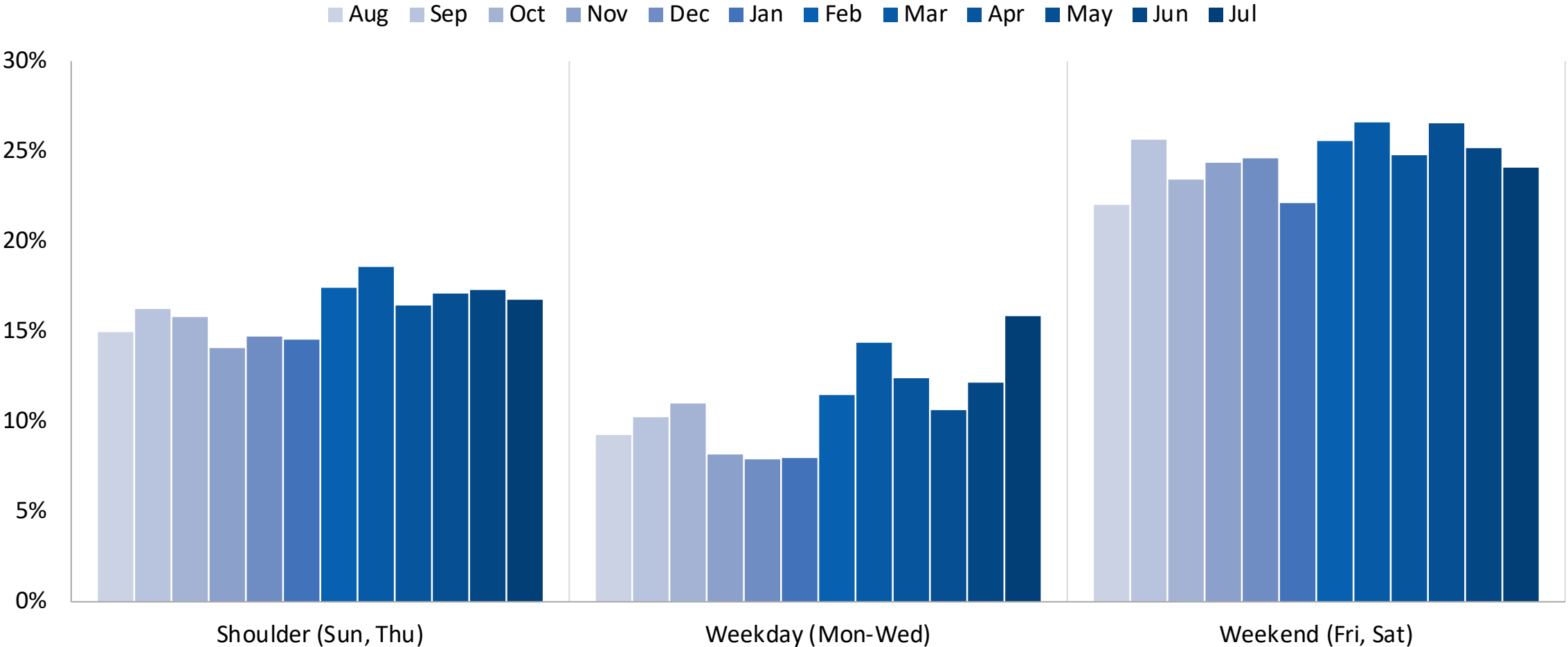
# Rate Curve Flattening, More Normal

Total US, monthly ADR, 2019, 2022, 2023



# Weekends Lead with Strong Premium

US, ADR % change to 2019, Aug 2022 – Jul 2023





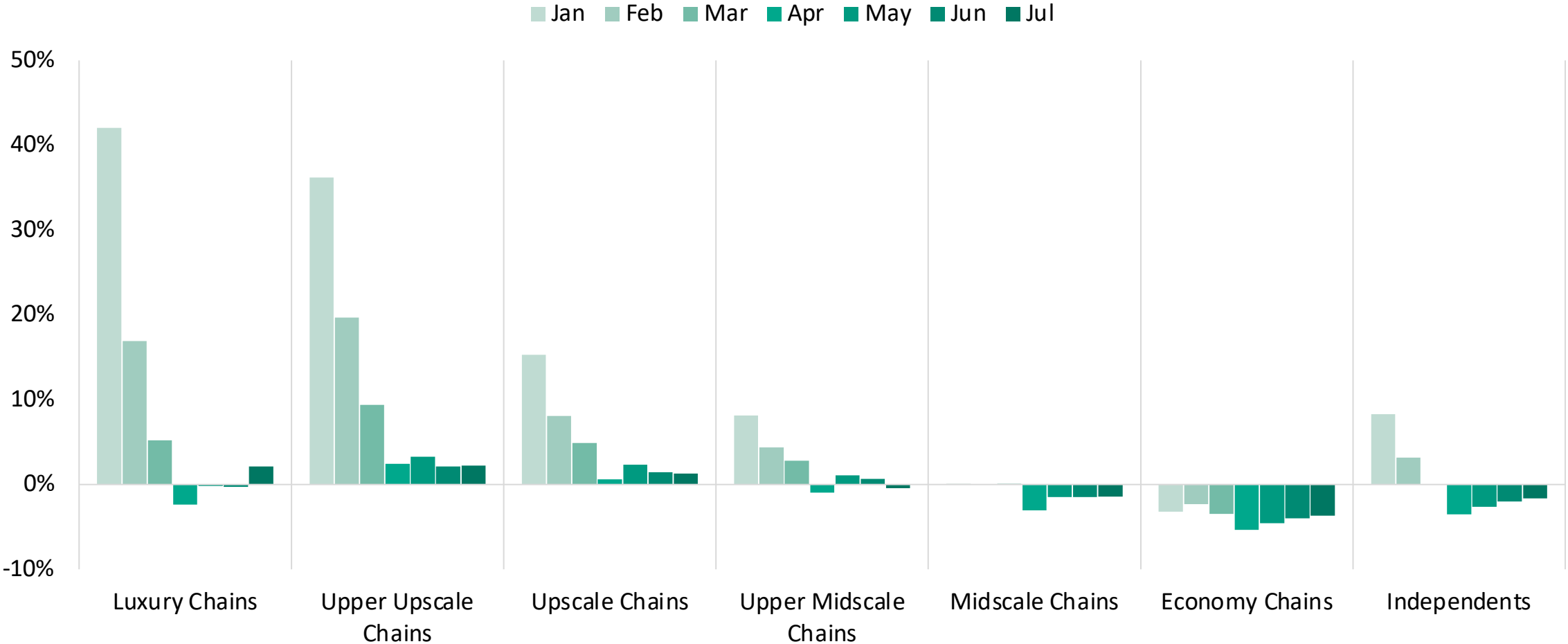


# Chains



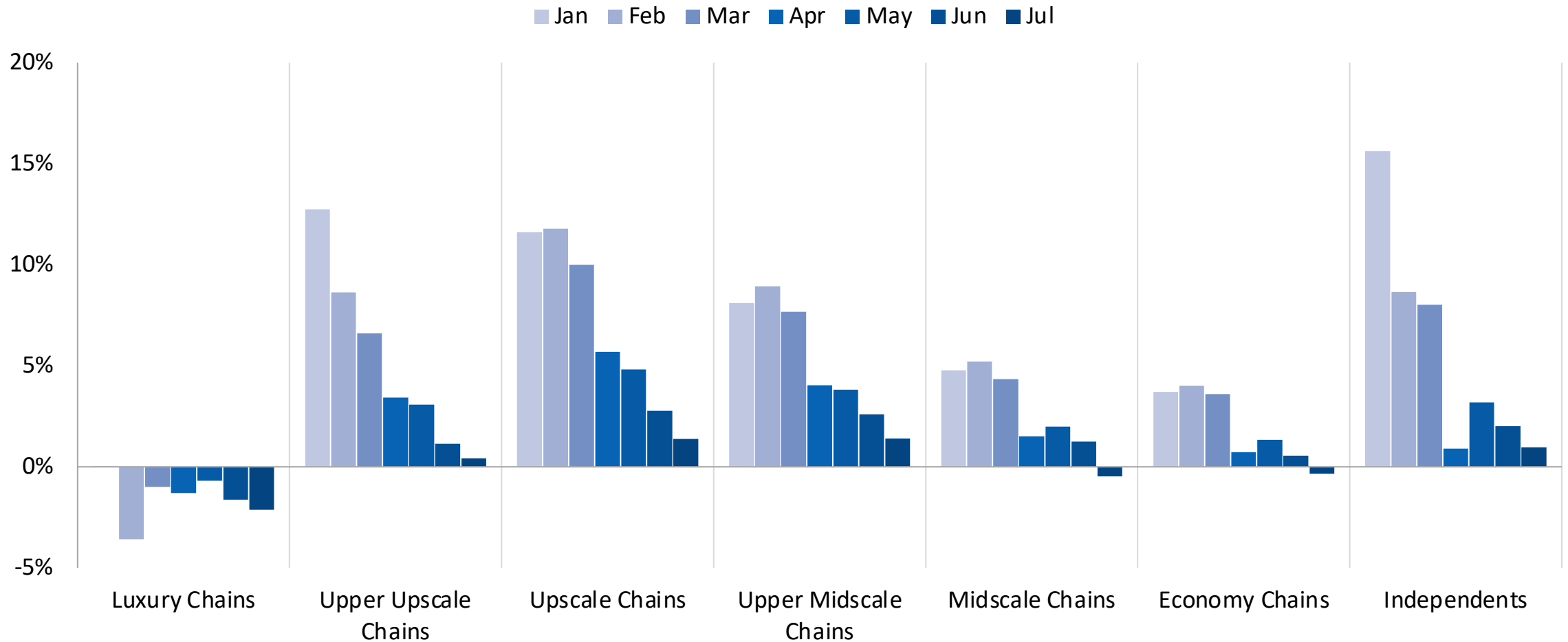
# Three of seven scales increase occupancy in July

U.S., occupancy YoY % change, Jan 2023 – Jul 2023



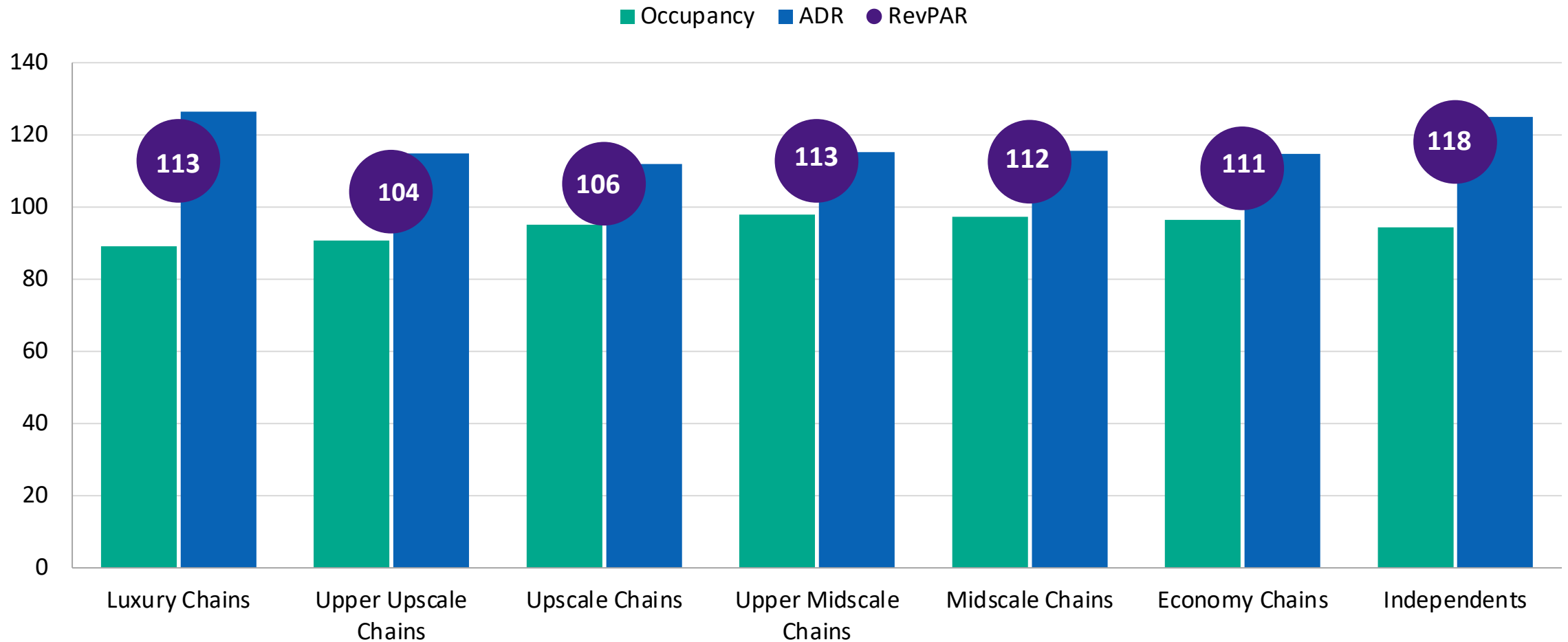
# Midscale, Economy pricing power depleted

U.S., ADR YoY % change, Jan 2023 – Jul 2023



# RevPAR indexes aligned across four chains YTD

U.S., Index to 2019, YTD Jul 2023





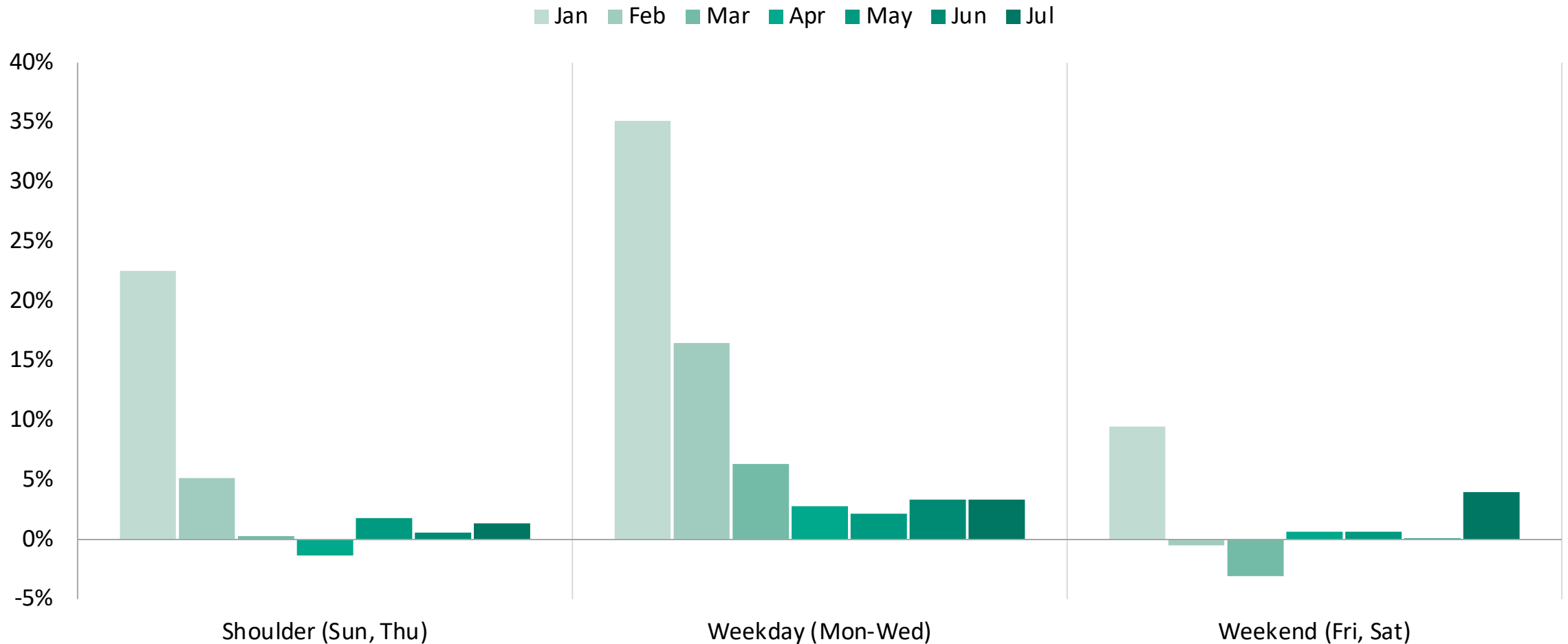


# Segmentation



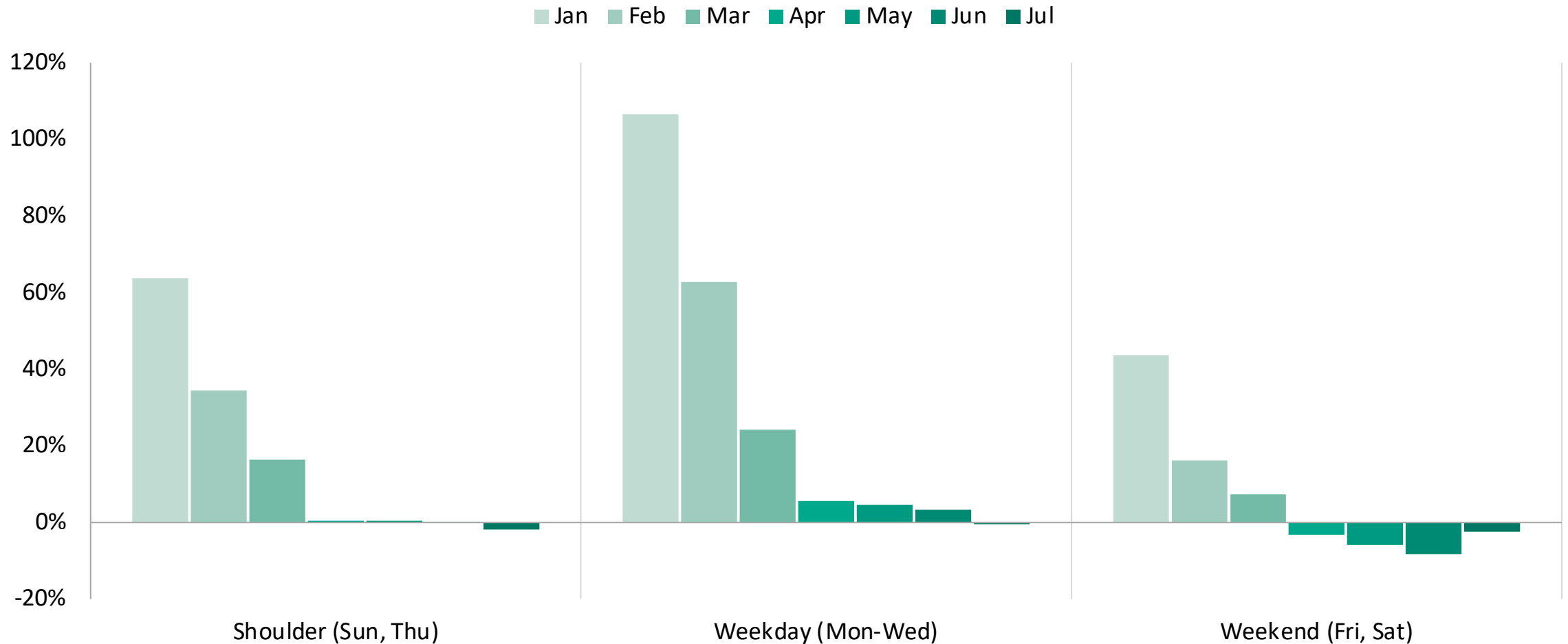
# Holiday shift favors transient leisure travelers...

US, Lux & Upper Upscale classes, Transient occ % change YOY, Jan 2023 – Jul 2023



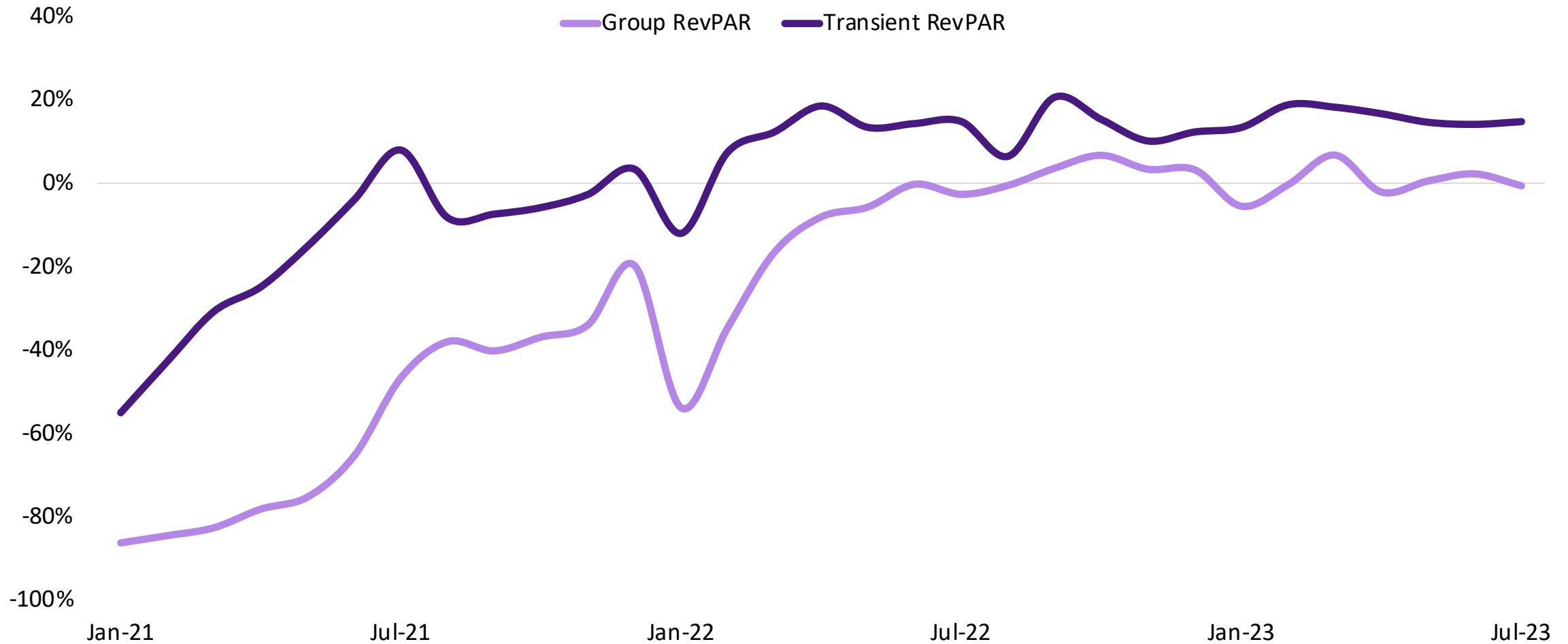
# ... But mid-week holiday cuts into group calendars

US, Lux & Upper Upscale classes, Group occ % change YOY, Jan 2023 – Jul 2023



# Group RevPAR stuck around 2019 level

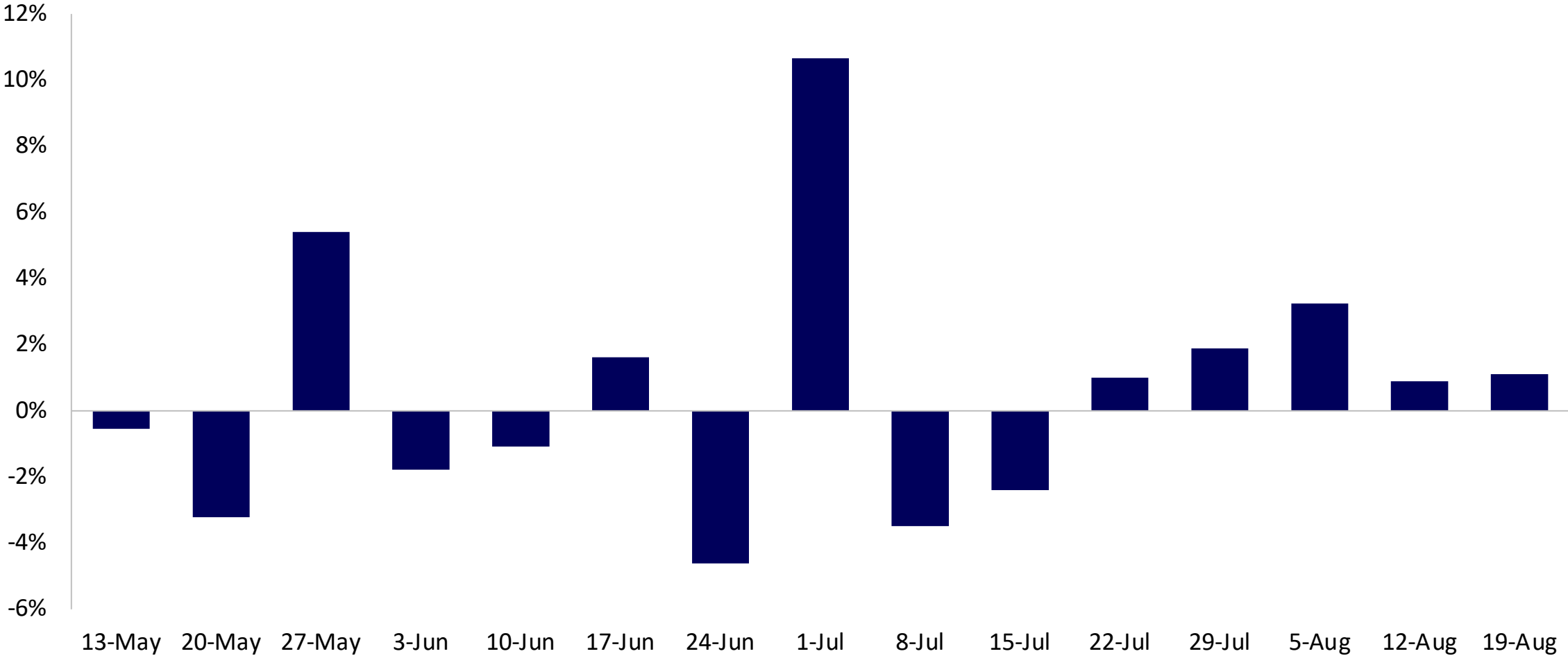
U.S., Lux & Upper Upscale classes, RevPAR % chg. to 2019, Jan 2021 – Jul 2023





# August group demand starting to climb

U.S., Lux & Upper Ups classes, weekly group demand % chg. YoY, 13 May – 19 Aug 2023



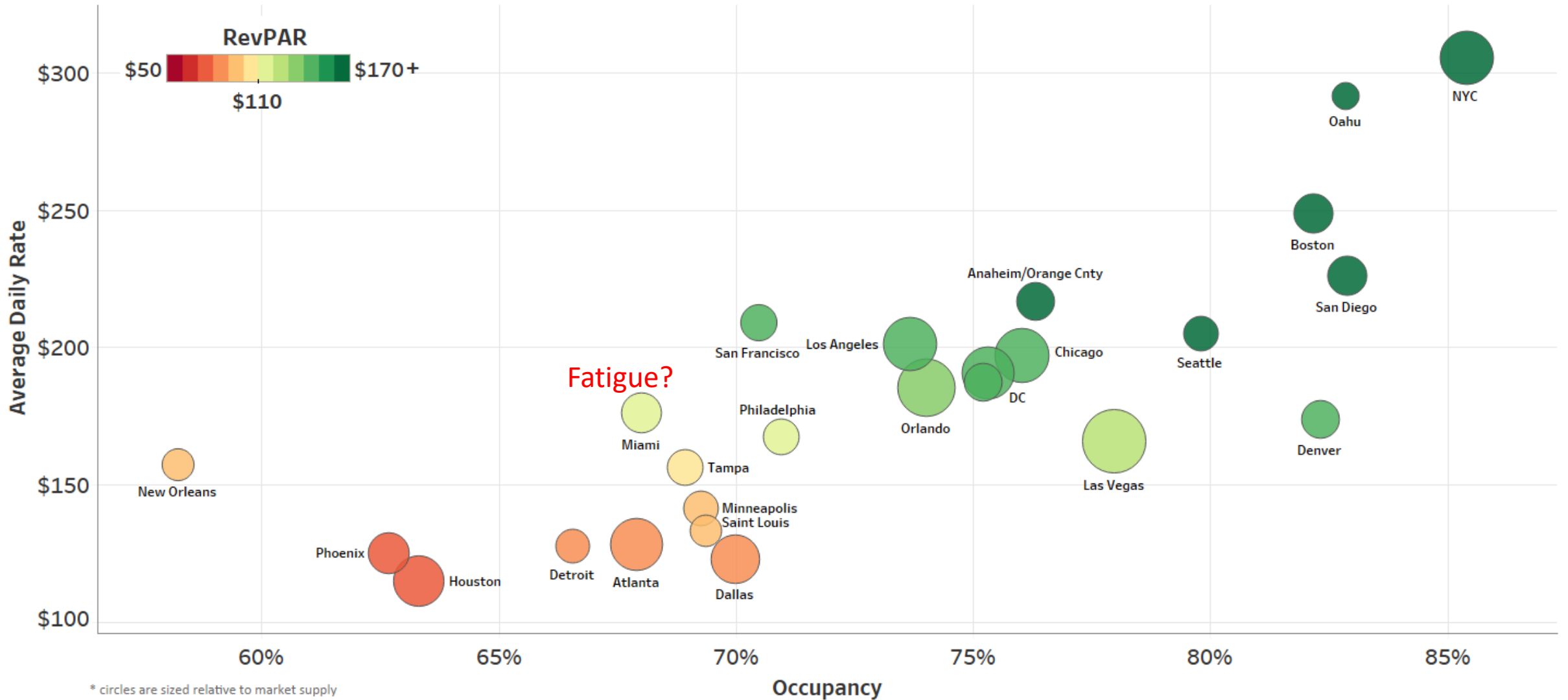


# Markets



# U.S. Top 25 Markets

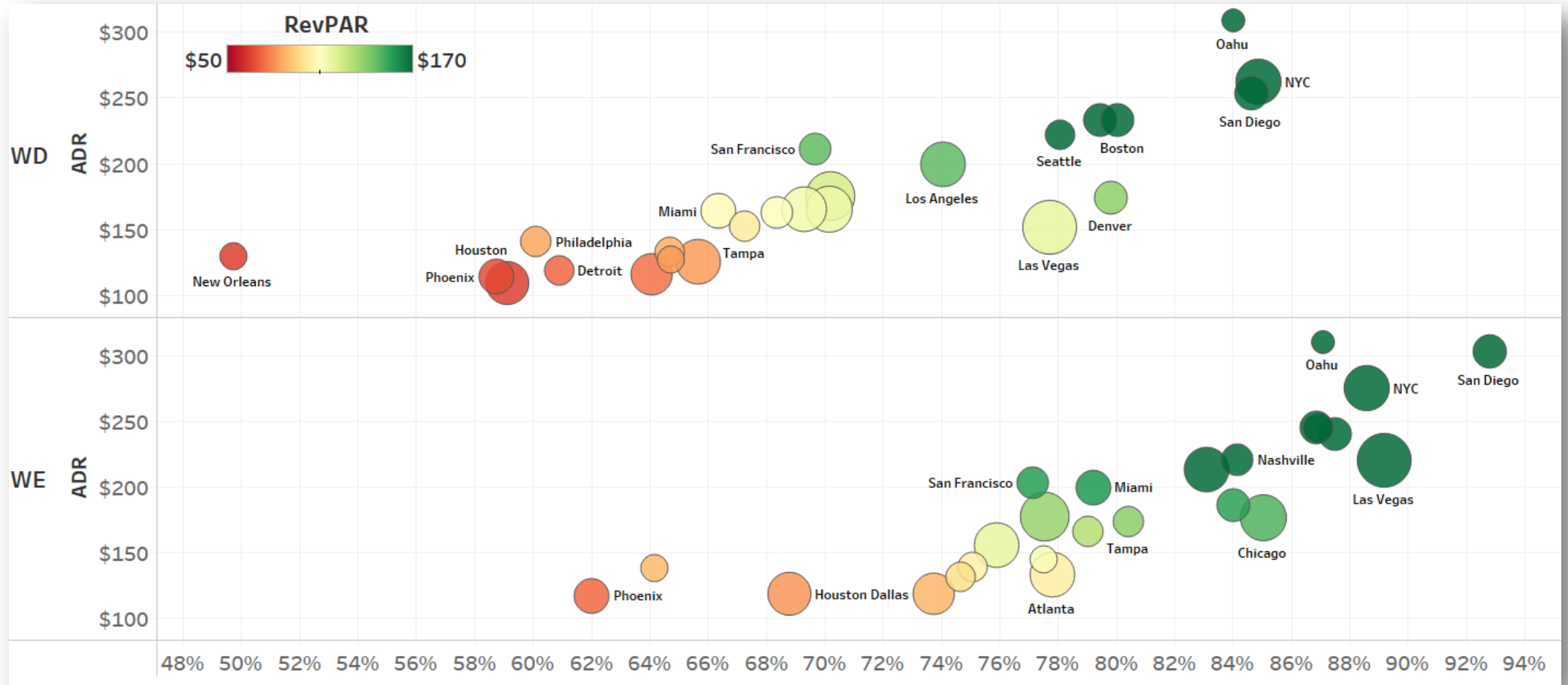
(Monthly Performance June 2023)



\* circles are sized relative to market supply

# Fridays & Saturdays Still Bring in the Green (\$\$\$)

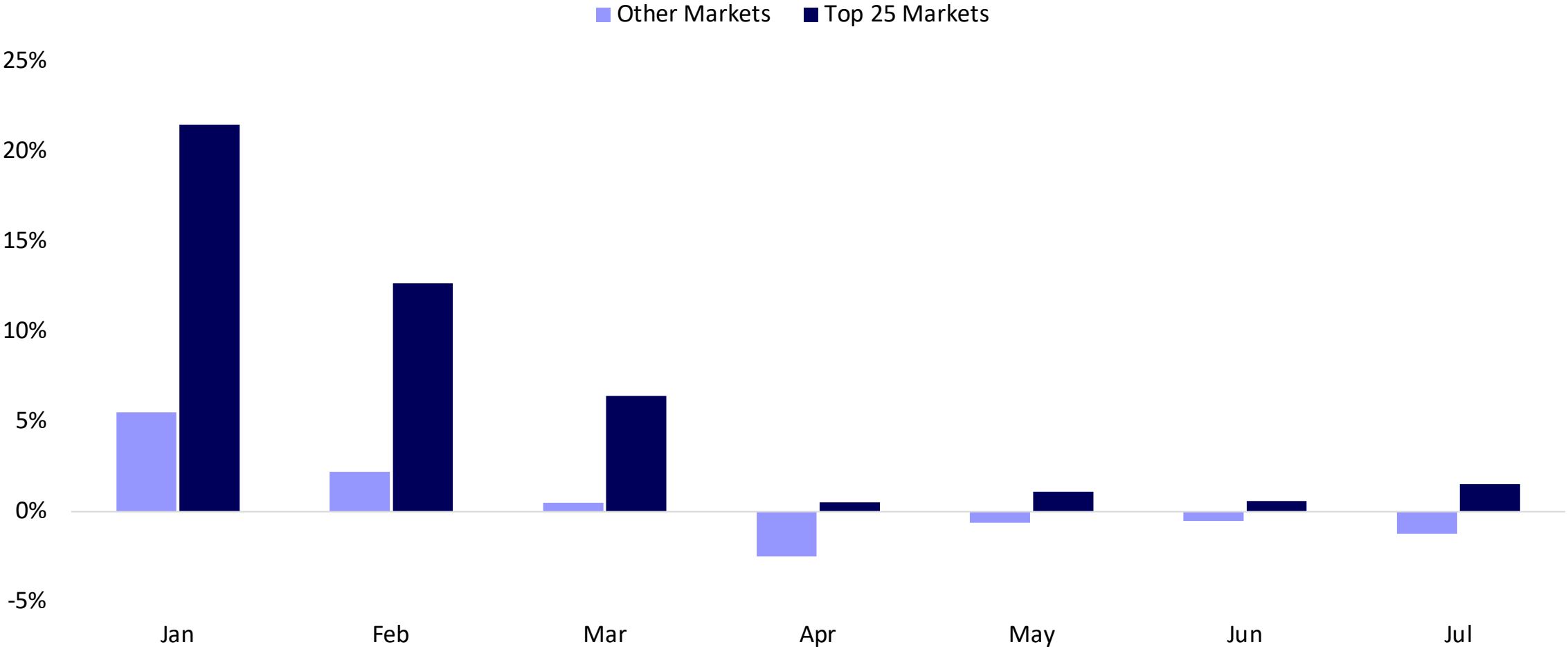
Top 25 Markets, Running 28 days, Weekday vs Weekend



Size of the circles represent room inventory

# Top 25 market demand continues to drive U.S. demand

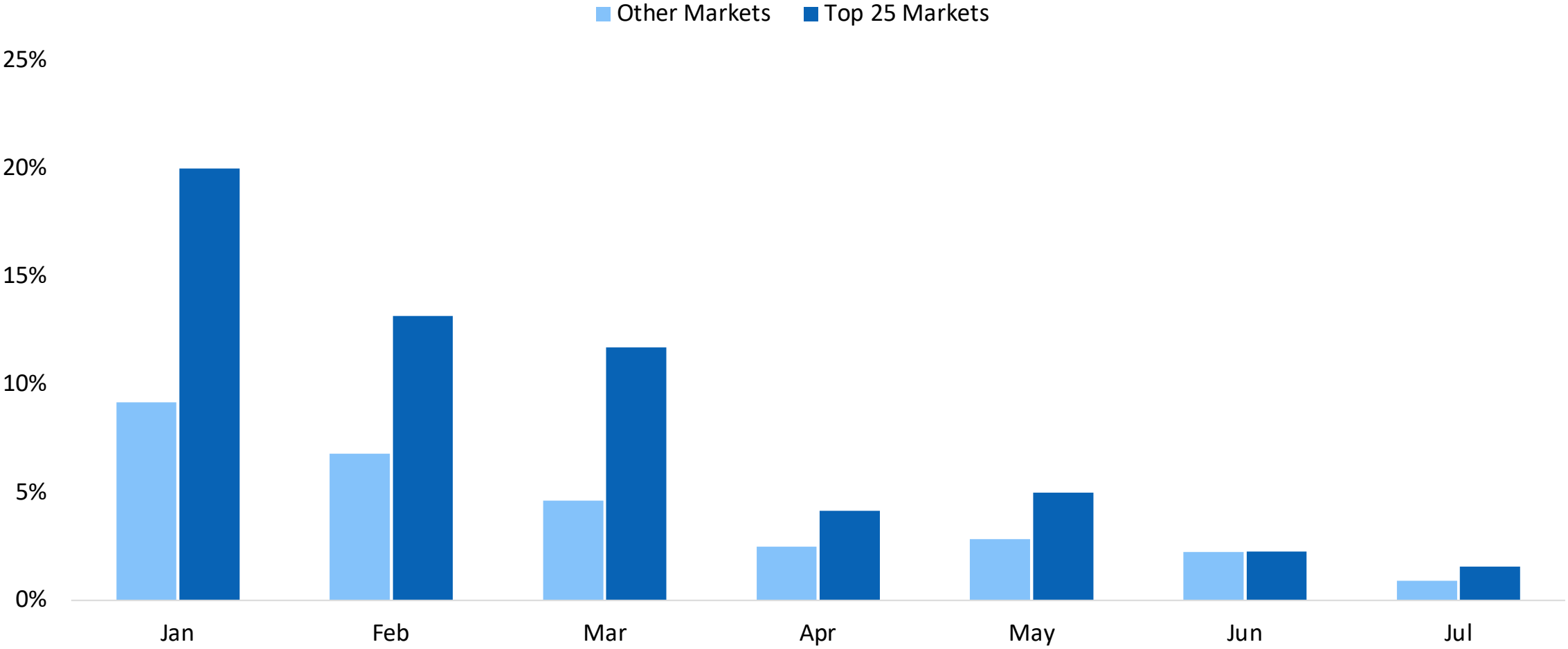
US, demand, YoY % change, Jan – Jul 2023





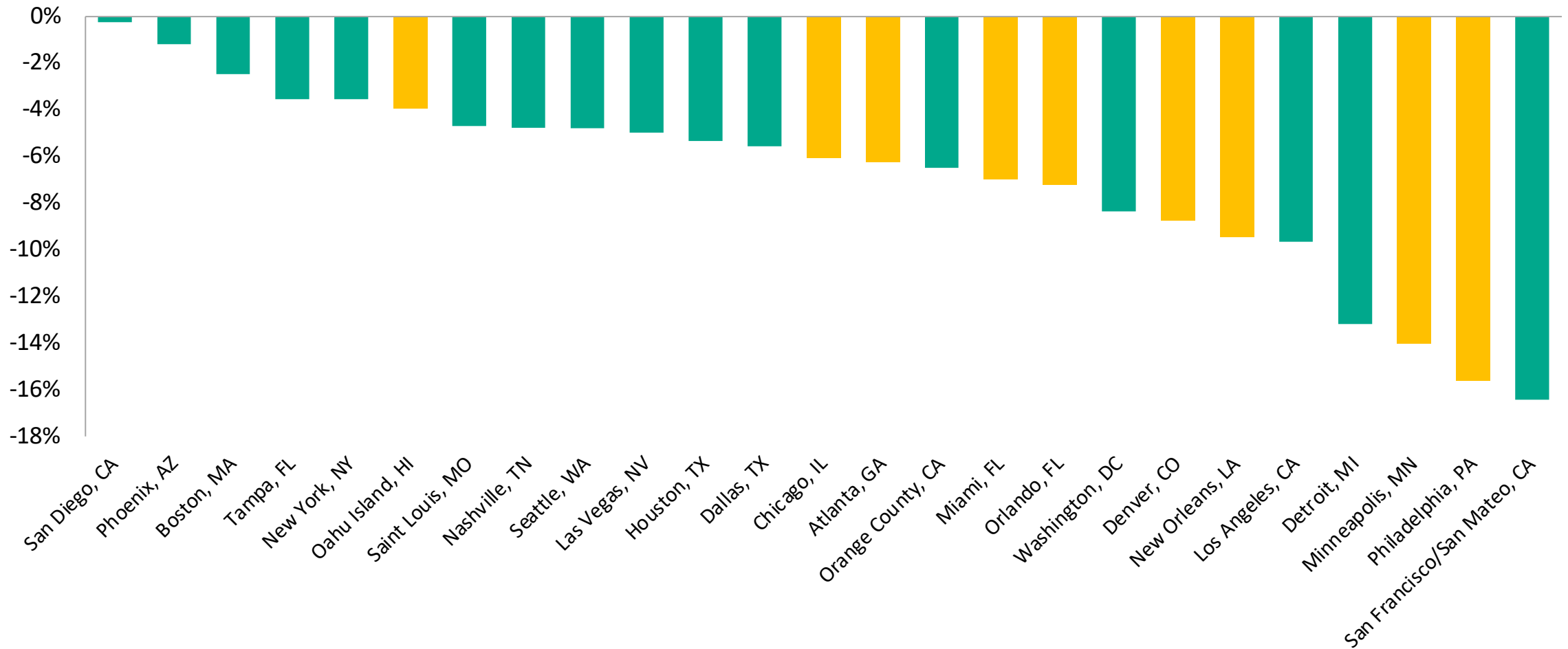
# ADR growth equalizes across market sizes

US, ADR, YoY % change, Jan – Jul 2023



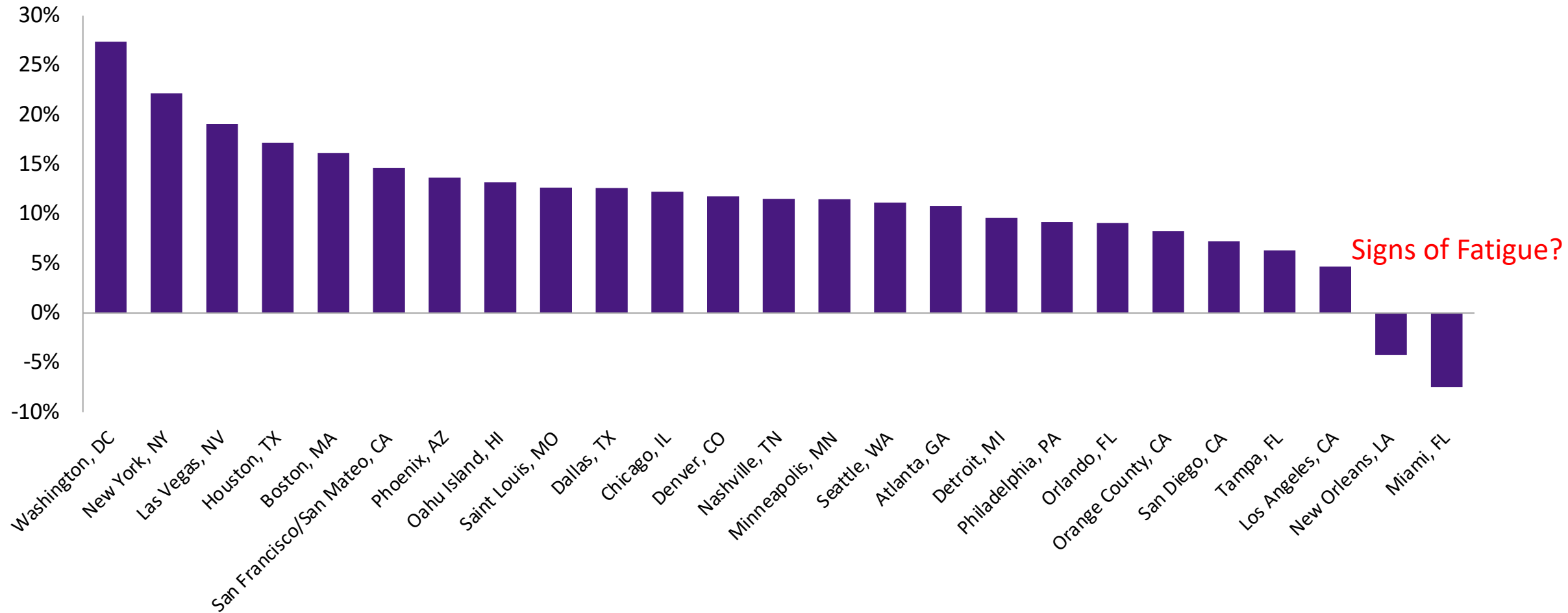
# No markets are back to pre-pandemic occ level though

Top 25 Markets, occupancy % chg. to 2019, Jul 2023



# RevPAR is still high in most markets

Top 25 Markets, RevPAR YoY % chg., YTD Jul 2023





# Pipeline



# Construction drops year-over-year

U.S., Pipeline rooms in thousands by phase, Jul 2023 and 2022

Phase	2023	2022	% Change
In Construction	149	153	-2.5%
Final Planning	249	177	40%
Planning	239	279	-14%
<b>Under Contract</b>	<b>637</b>	<b>609</b>	<b>4.5%</b>



# Rising Costs, Interest Rates Loom Over New Development

## Labor Costs and Financial Uncertainty Add to Developers' Concerns

### Interest Rate Hikes Could Slow US Hotel Development

With Higher Construction Debt Costs, Hotel Portfolio Growth Likely To Be Transactions-Based



### Required Renovations for Branded Hotels Ramp Up, but There's Room for Negotiation

Hotel Owners Look for Ways To Stretch Their Renovation Dollars



### What interest-rate hikes mean for the U.S. hotel industry

By Alicia Hoisington • Jul 31, 2018 12:13am

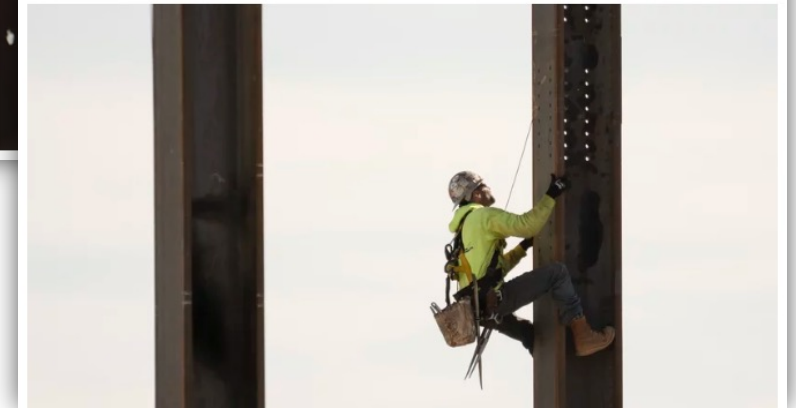
Construction Economic Factors Economic Trends economy



### Where did the workers go? Construction jobs are plentiful, but workers are scarce

April 6, 2023 • 8:59 AM ET

By Mary Yang

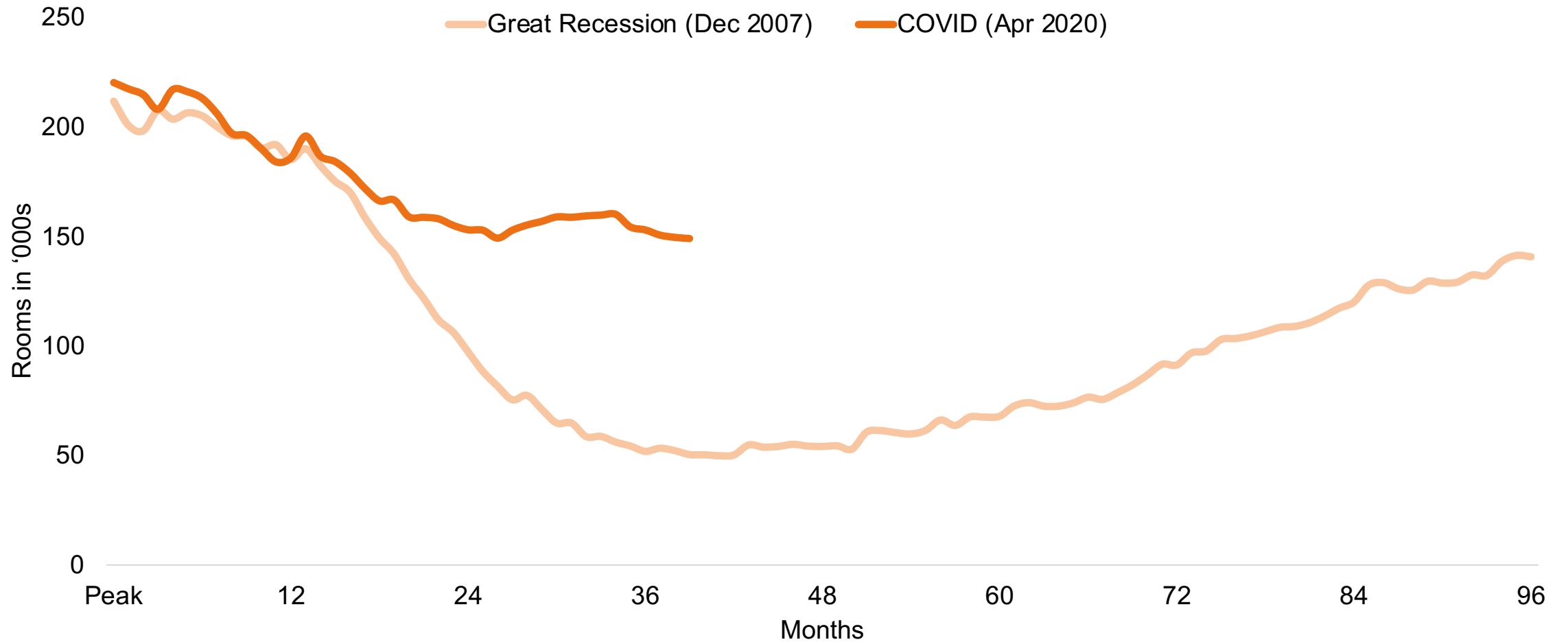


PERSONAL FINANCE > BANKING

### What Happened to Silicon Valley Bank?

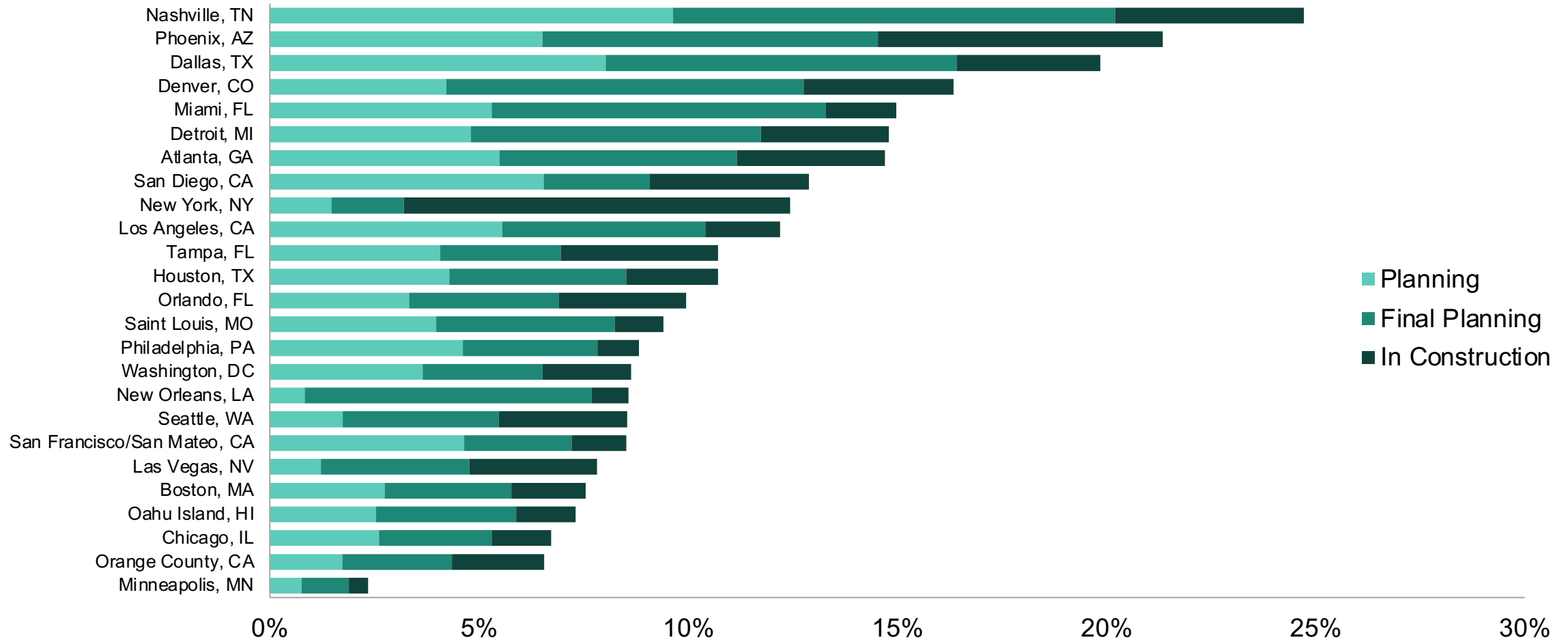
# The curve is flattening

Total U.S., rooms in construction from prior peak, 2007 and 2020



# Hottest IC markets have more early dev plans, too

Top 25 markets, pipeline as percent of existing supply, Jul 2023





# Forecast



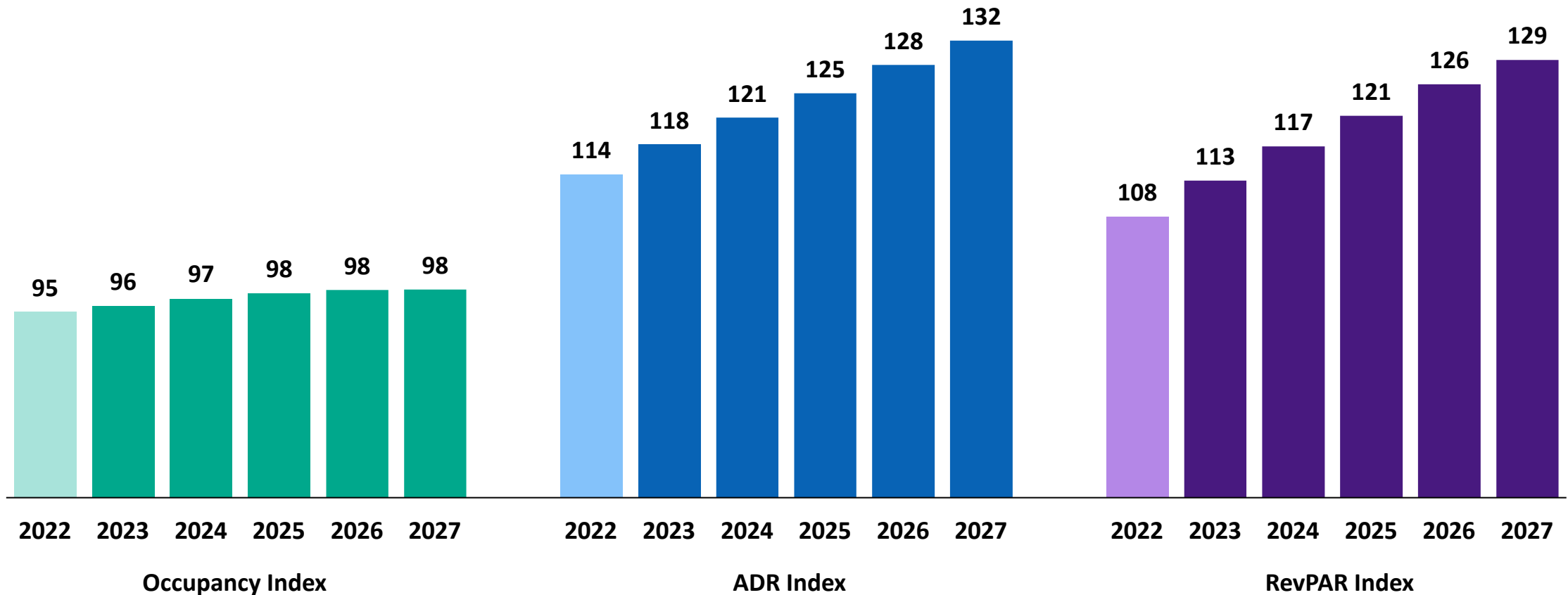
# Demand modestly downgraded

U.S., KPI YoY % change, 2022 – 2024F

	2022	2023F	2024F
Supply	1.8%	0.4%	1.0%
Demand	10.8%	1.2%	2.0%
Occupancy	8.9%	0.8%	1.0%
ADR	20.0%	3.6%	3.0%
RevPAR	30.6%	4.5%	4.1%

# Occupancy expected to remain below high-water mark

U.S. KPIs Indexed to 2019







# Oklahoma

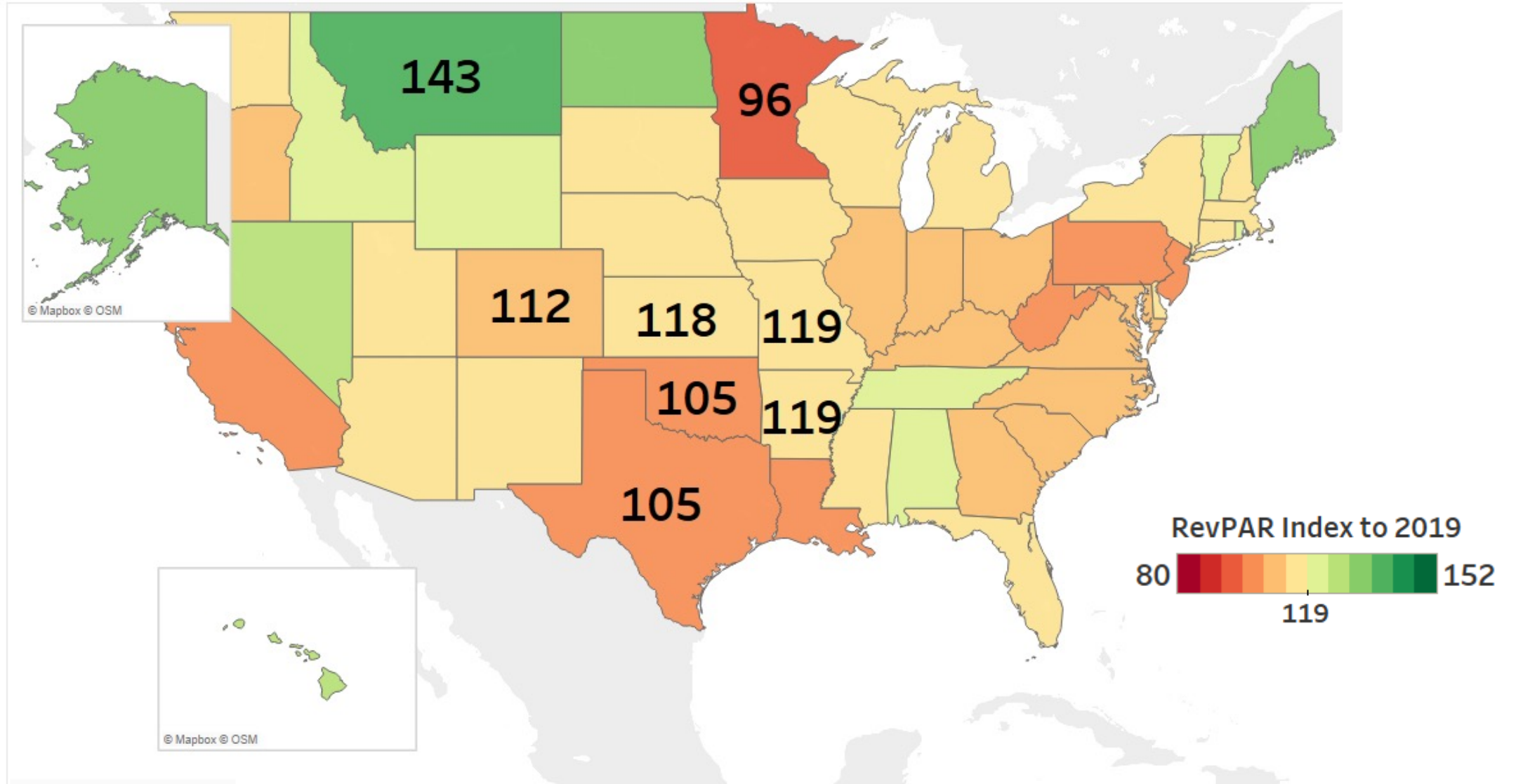
## Market & Submarket Analysis + Forecast

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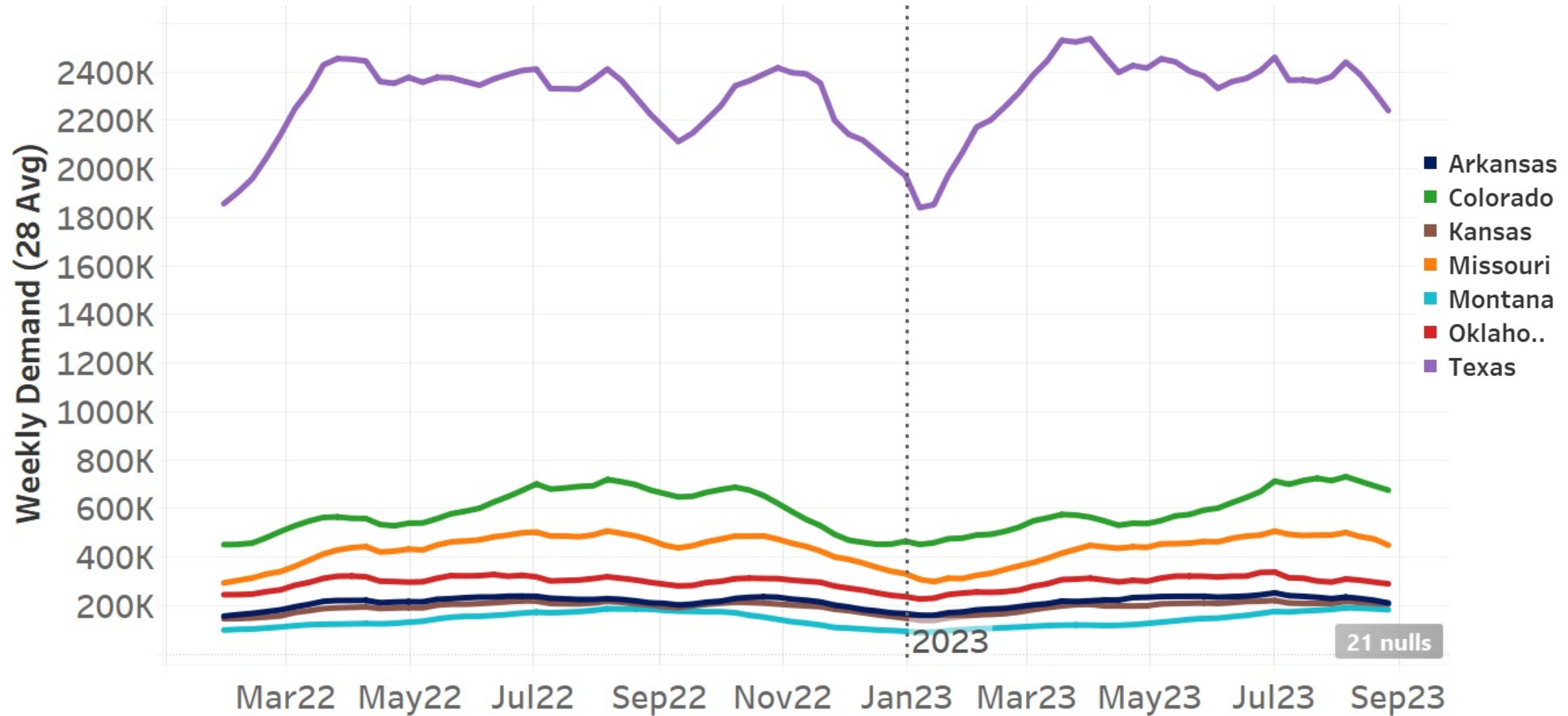
# Oklahoma Among States That Have Full Recovered RevPAR

U.S. States YTD RevPAR Indexed to 2019



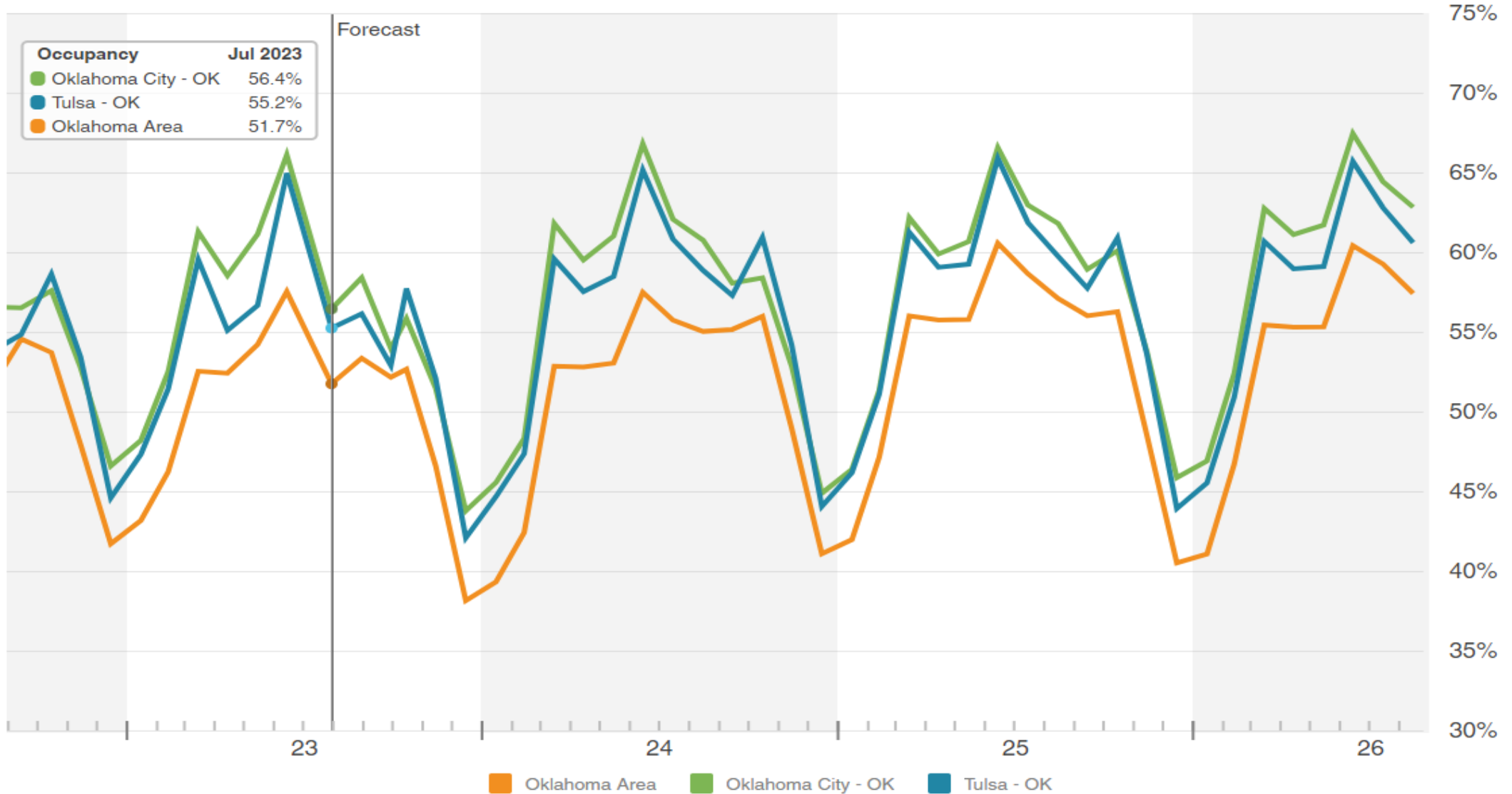
# Oklahoma State Demand, Running with similar supply states

As of July 2023



# Occupancy Normalizing, Stabilizing in the Long Term

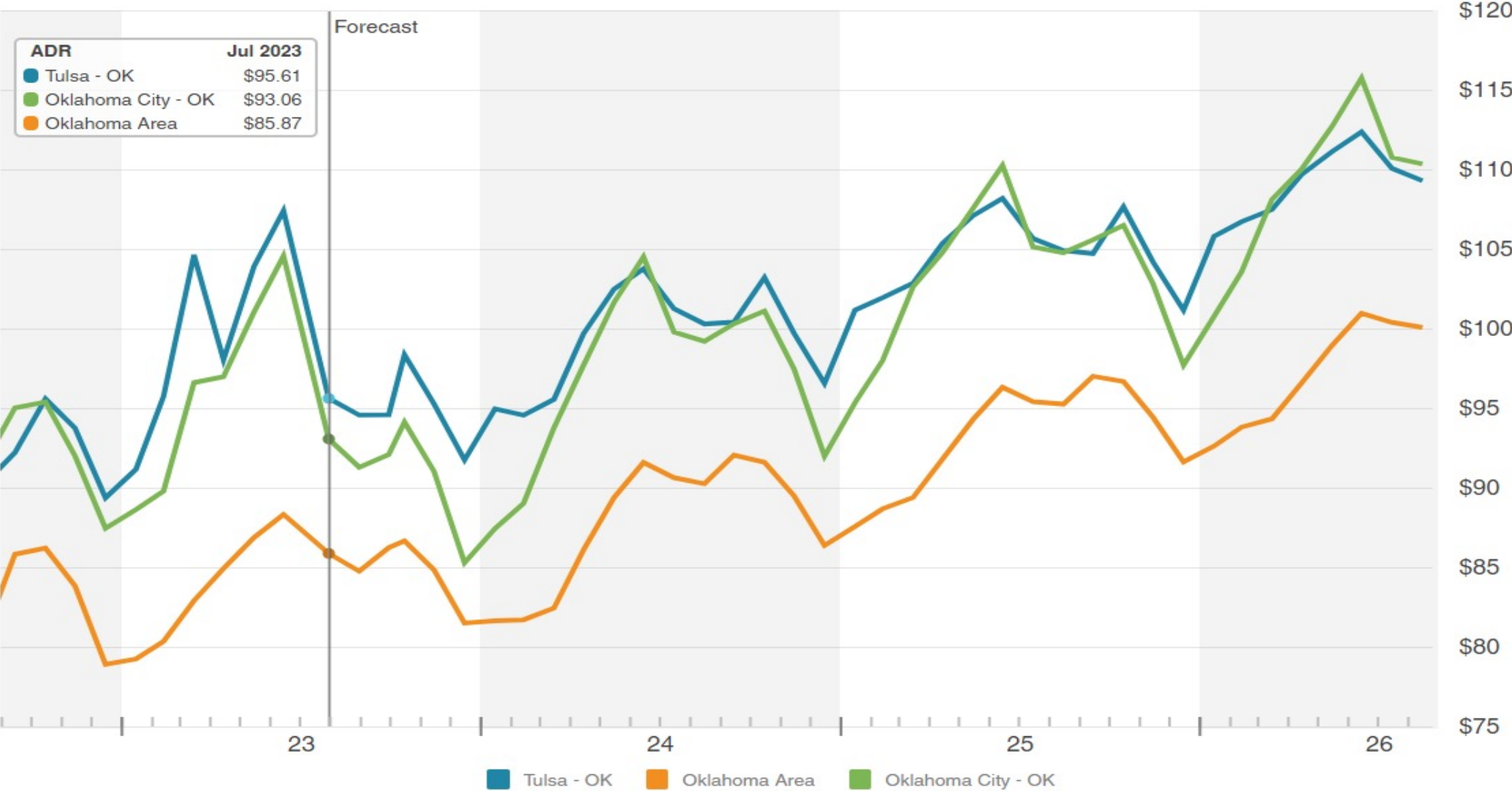
Oklahoma Select Markets, July 2023 Monthly Occupancy and Forecast





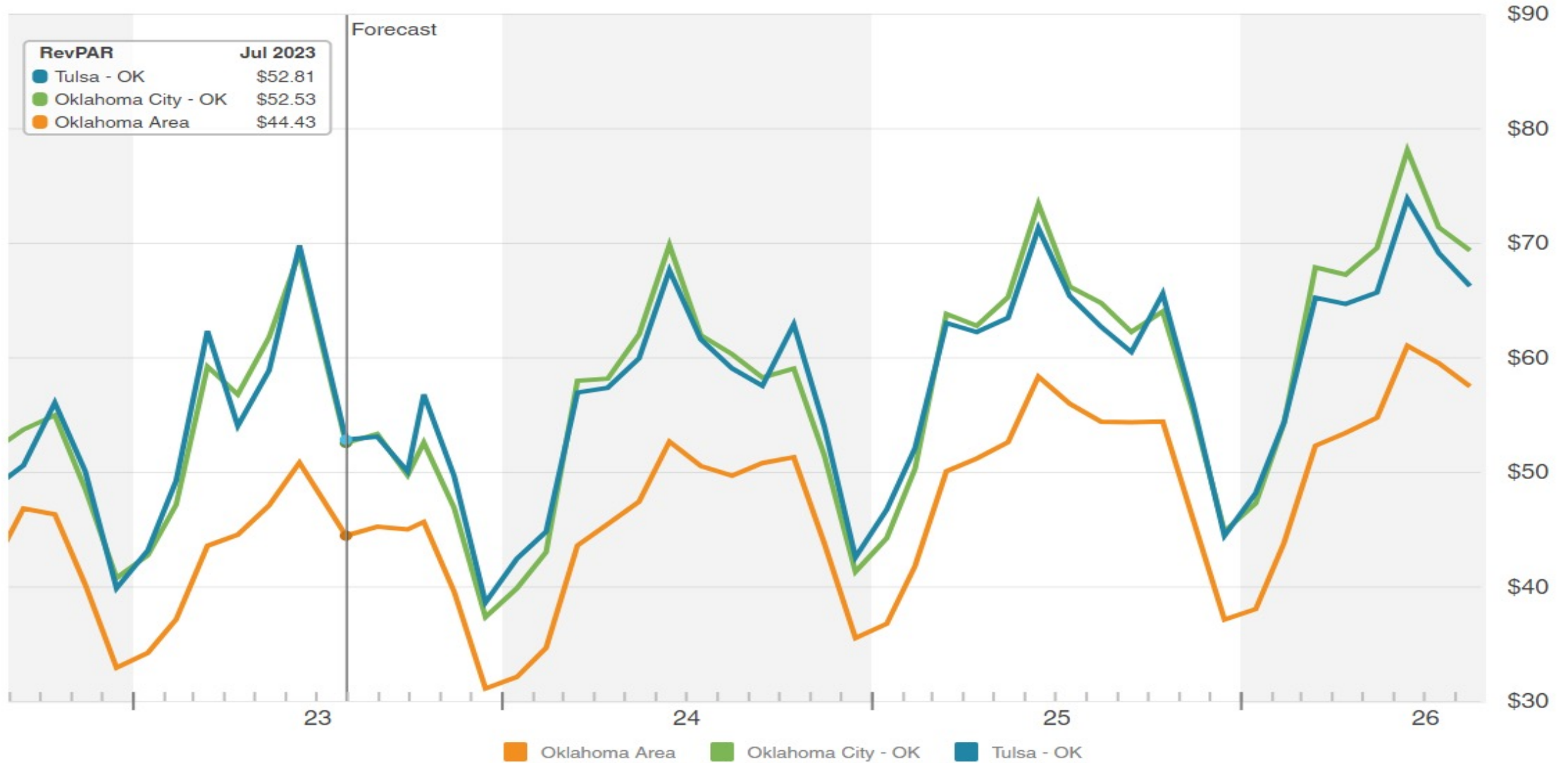
# ADR Steady, Seasonal with a yearly increase

Oklahoma Select Markets, July 2023 Monthly ADR and Forecast



# RevPAR follows suit.....

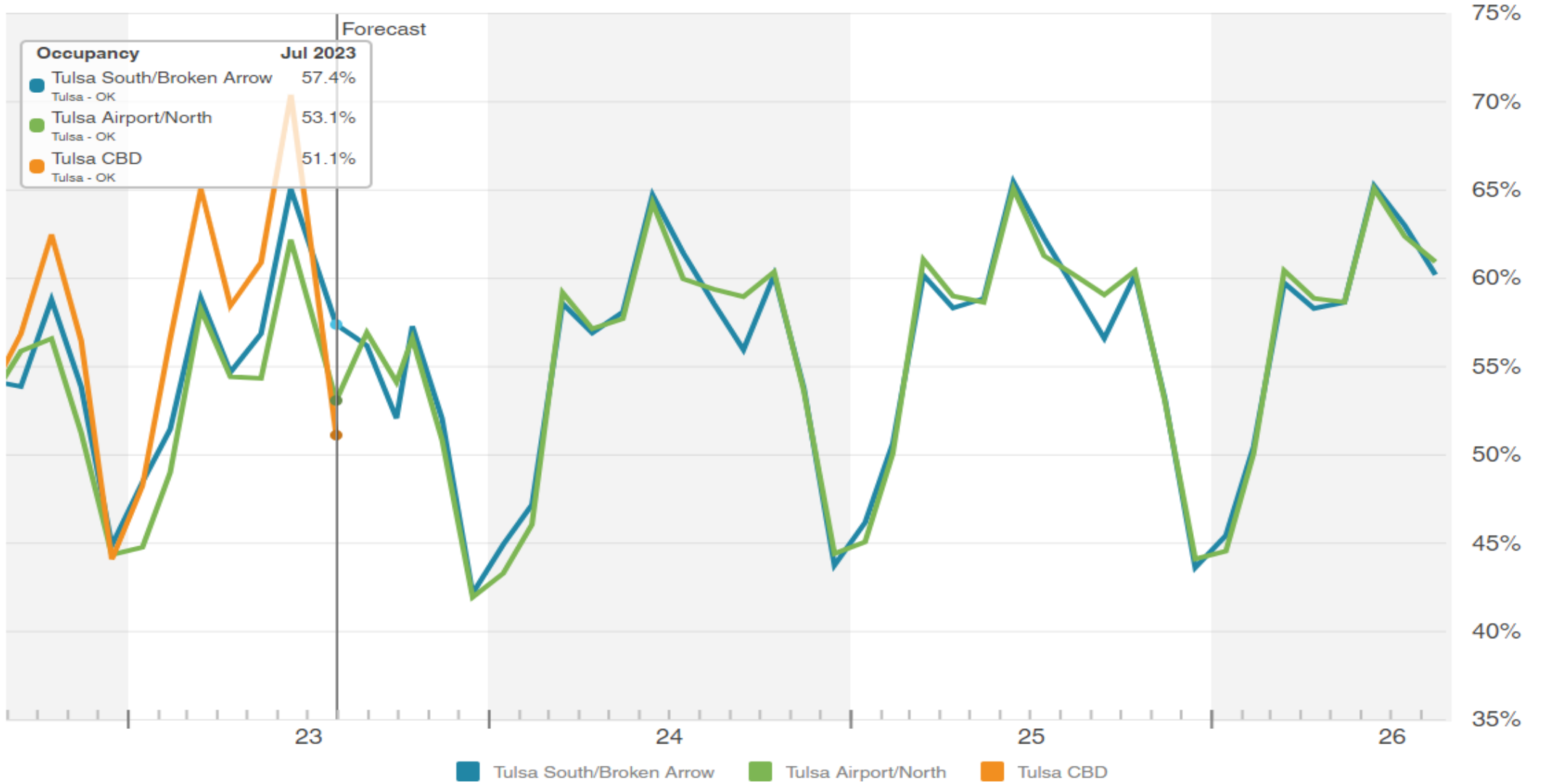
Select Markets, July 2023 Monthly RevPAR and Forecast





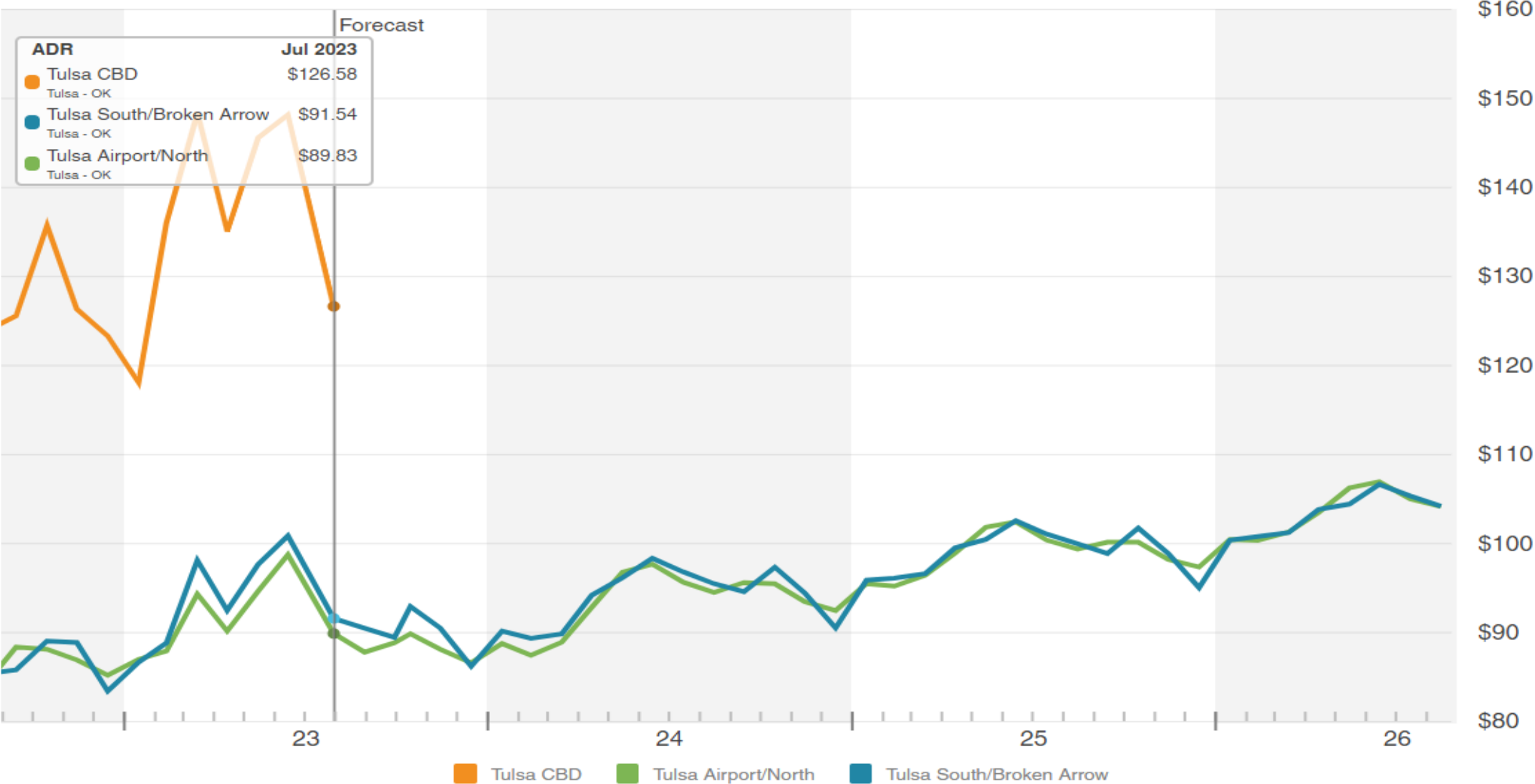
# CBD data insufficient : Airport/Broken Arrow running similar

Tulsa Submarkets, July 2023 Monthly Occupancy and Forecast



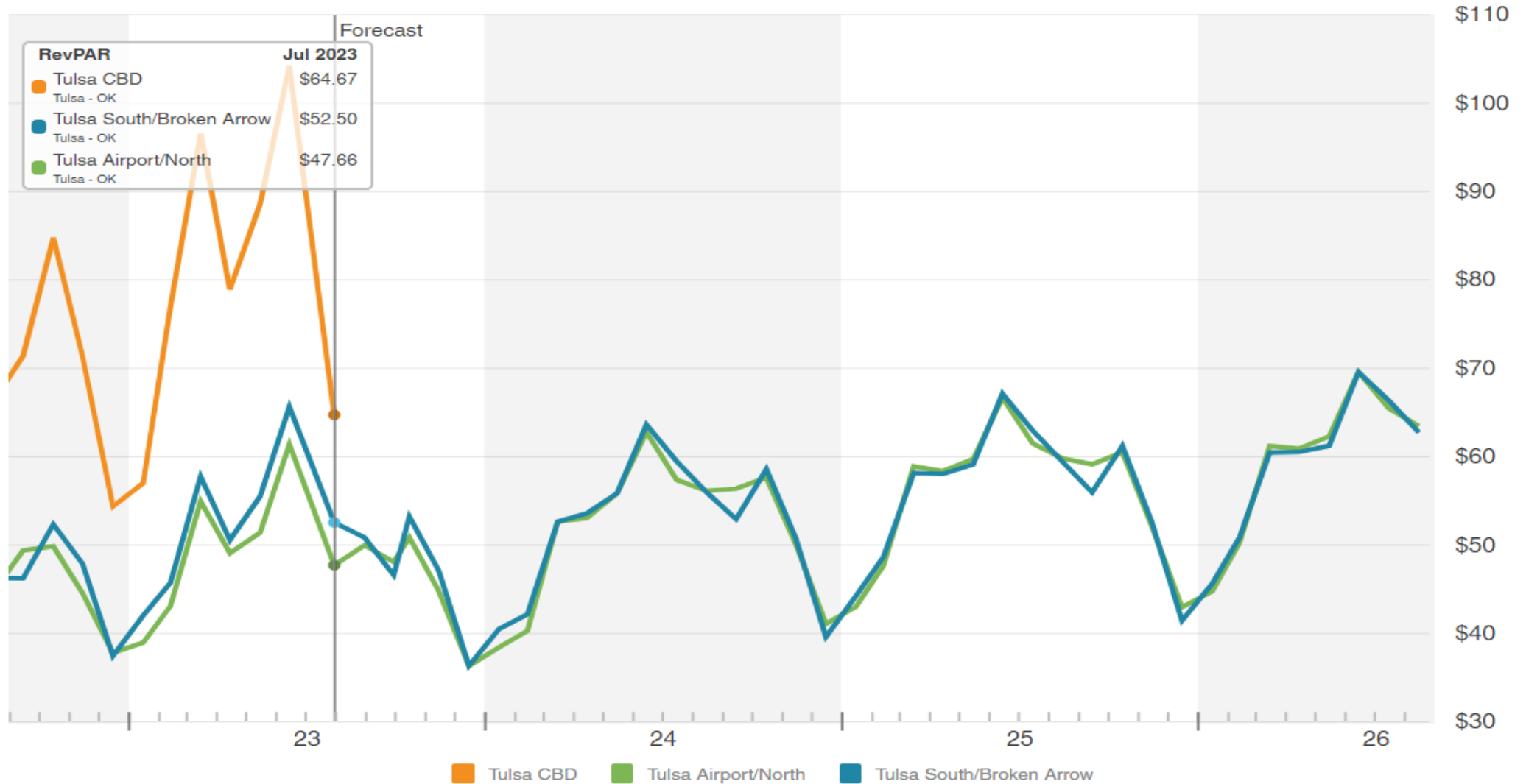
# ADR follows national trend and levels

Tulsa Submarkets, July 2023 Monthly ADR and Forecast



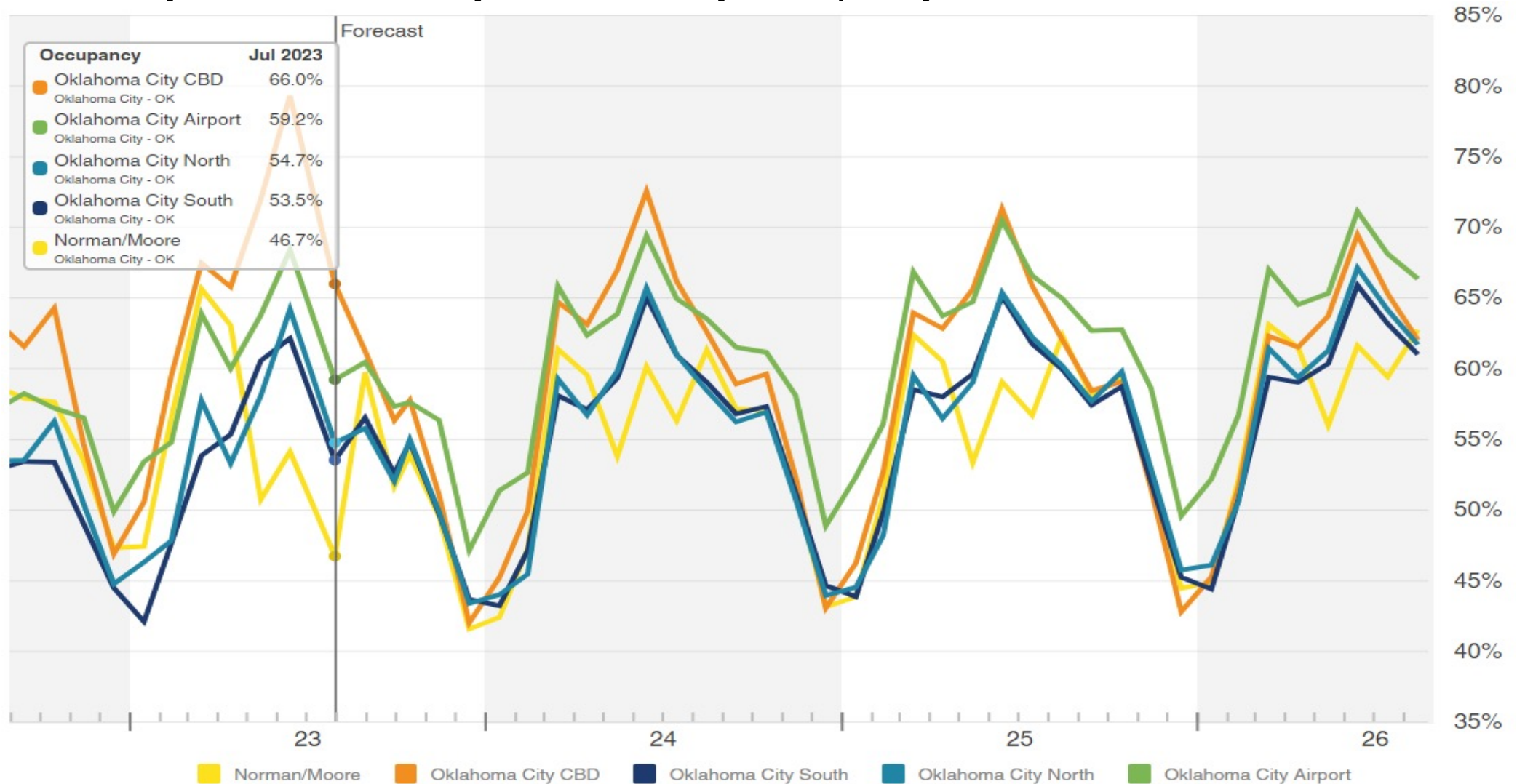
# Seasonality takes shape once again

Tulsa Submarkets, July 2023 Monthly RevPAR and Forecast



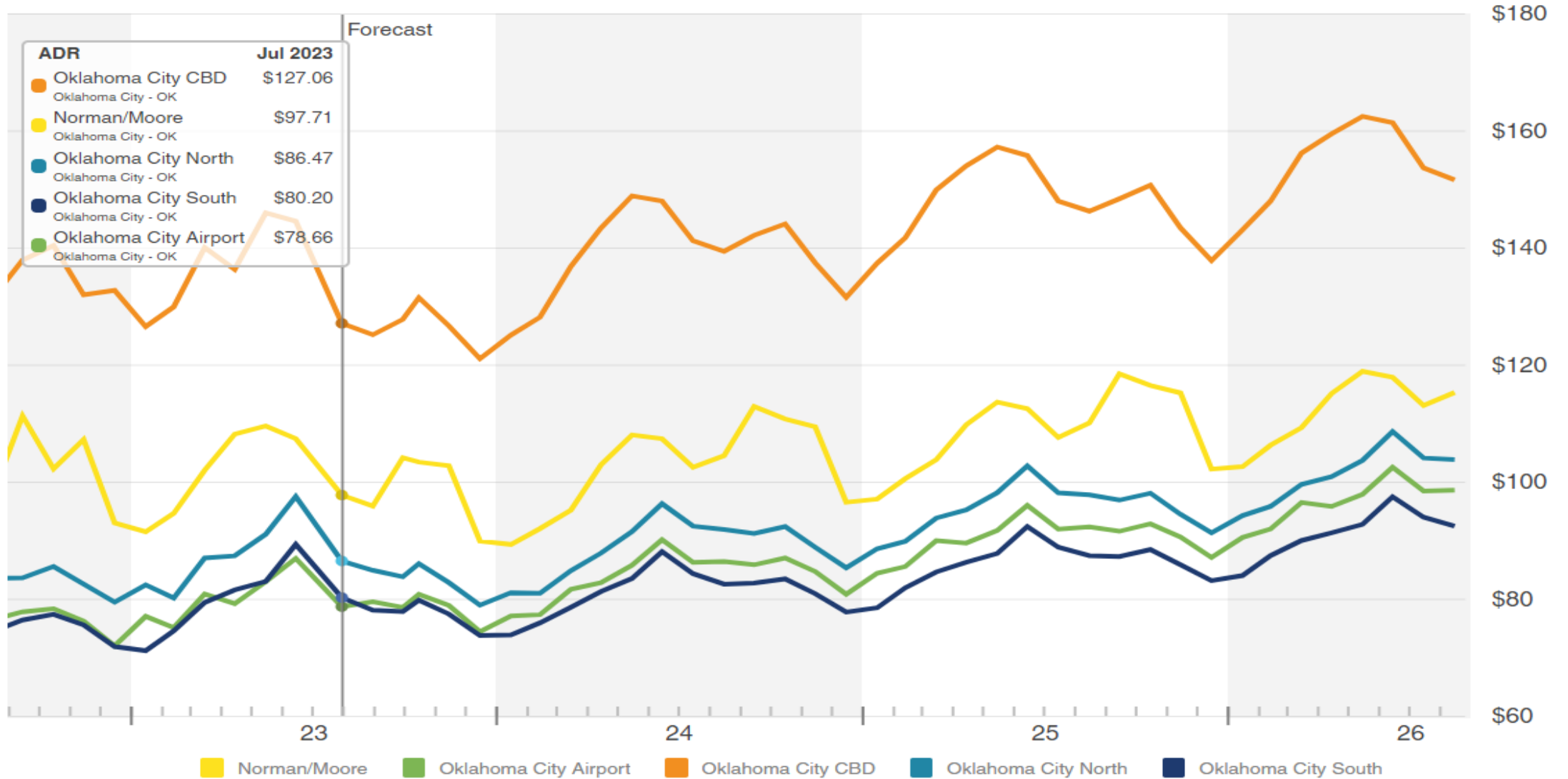
# Turbulent at beginning of 2023, but see leveling

Oklahoma City Submarkets, July 2023 Monthly Occupancy and Forecast



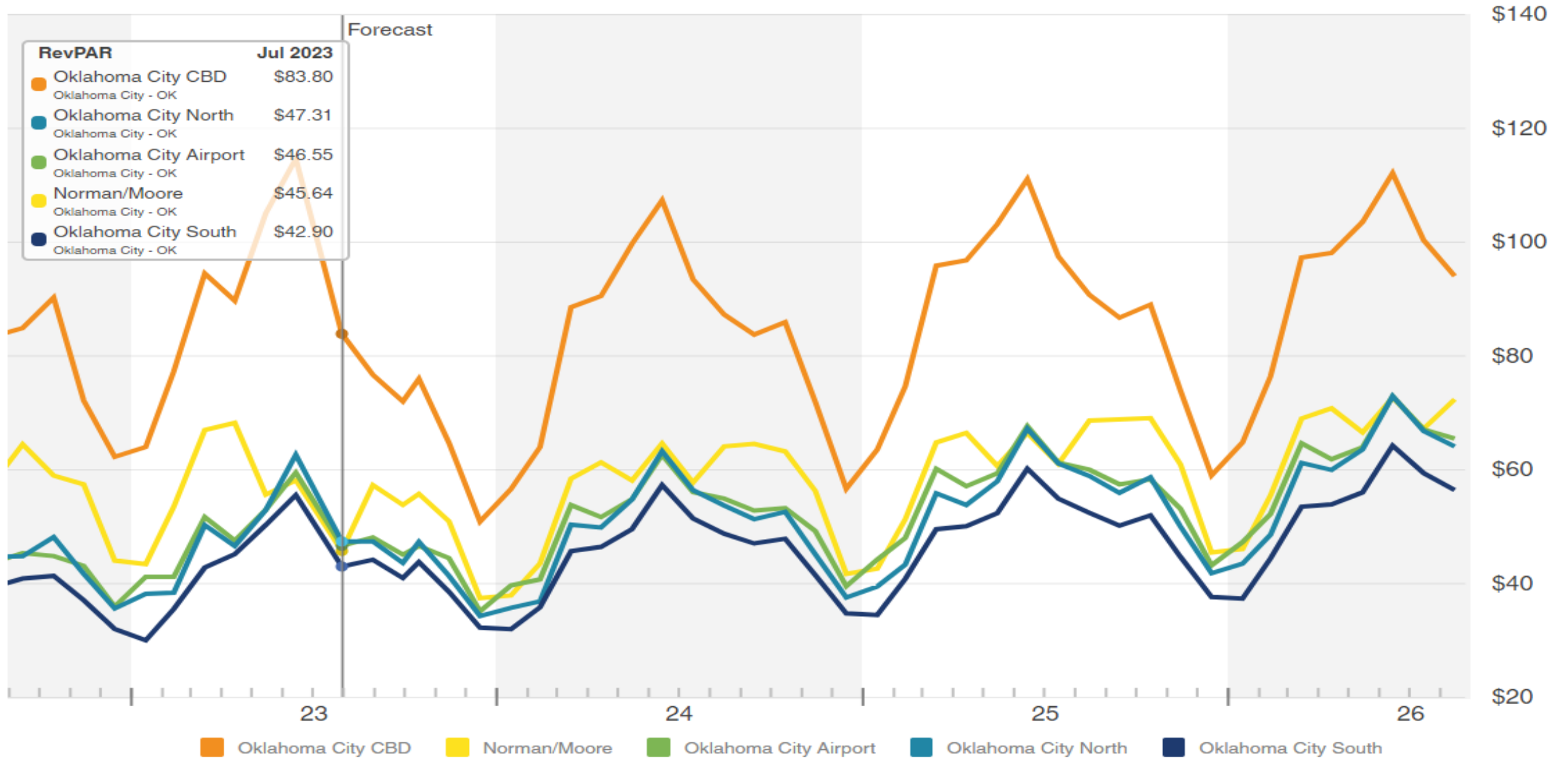
# Also following national trends

## Oklahoma City Submarkets, July 2023 Monthly ADR and Forecast



# Seasonality takes shape

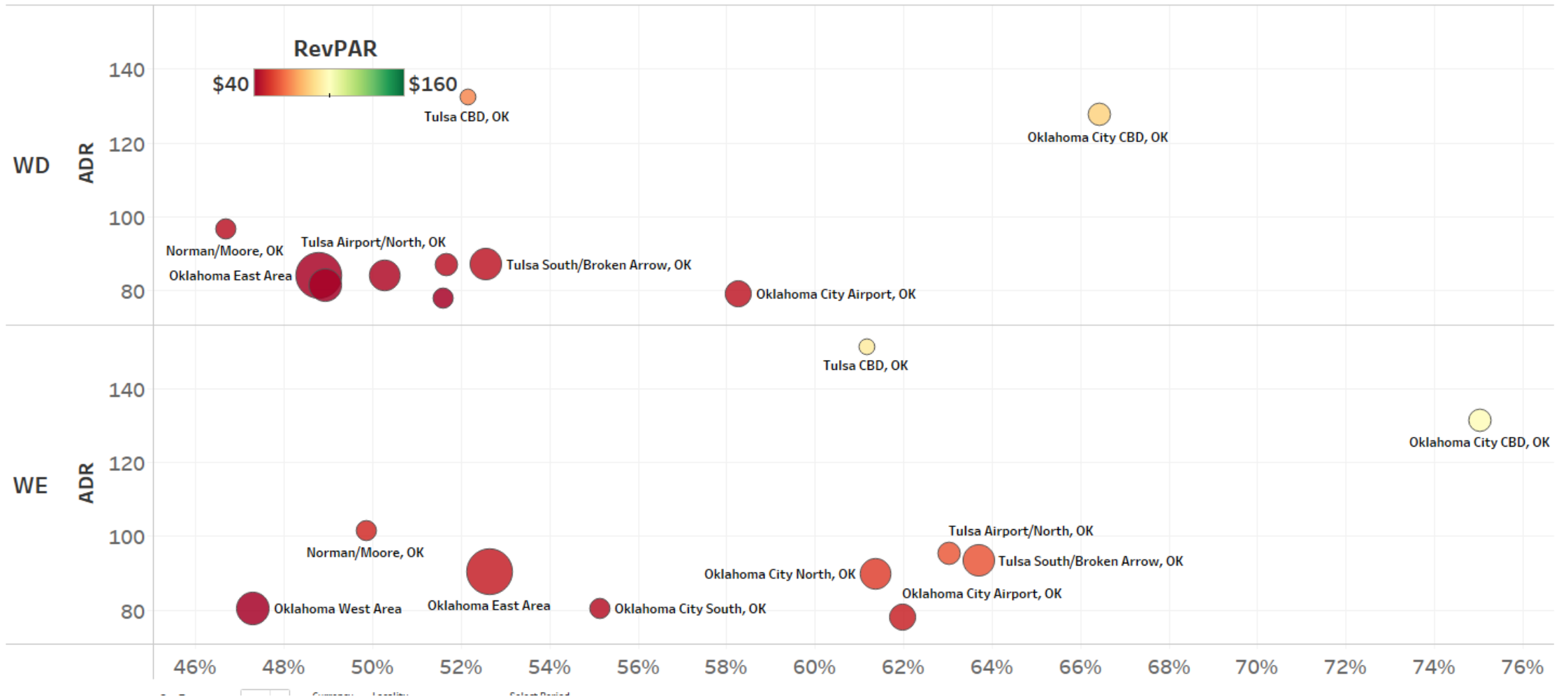
Oklahoma City Submarkets, July 2023 Monthly RevPAR and Forecast





# WD/WE run similar in a few submarkets

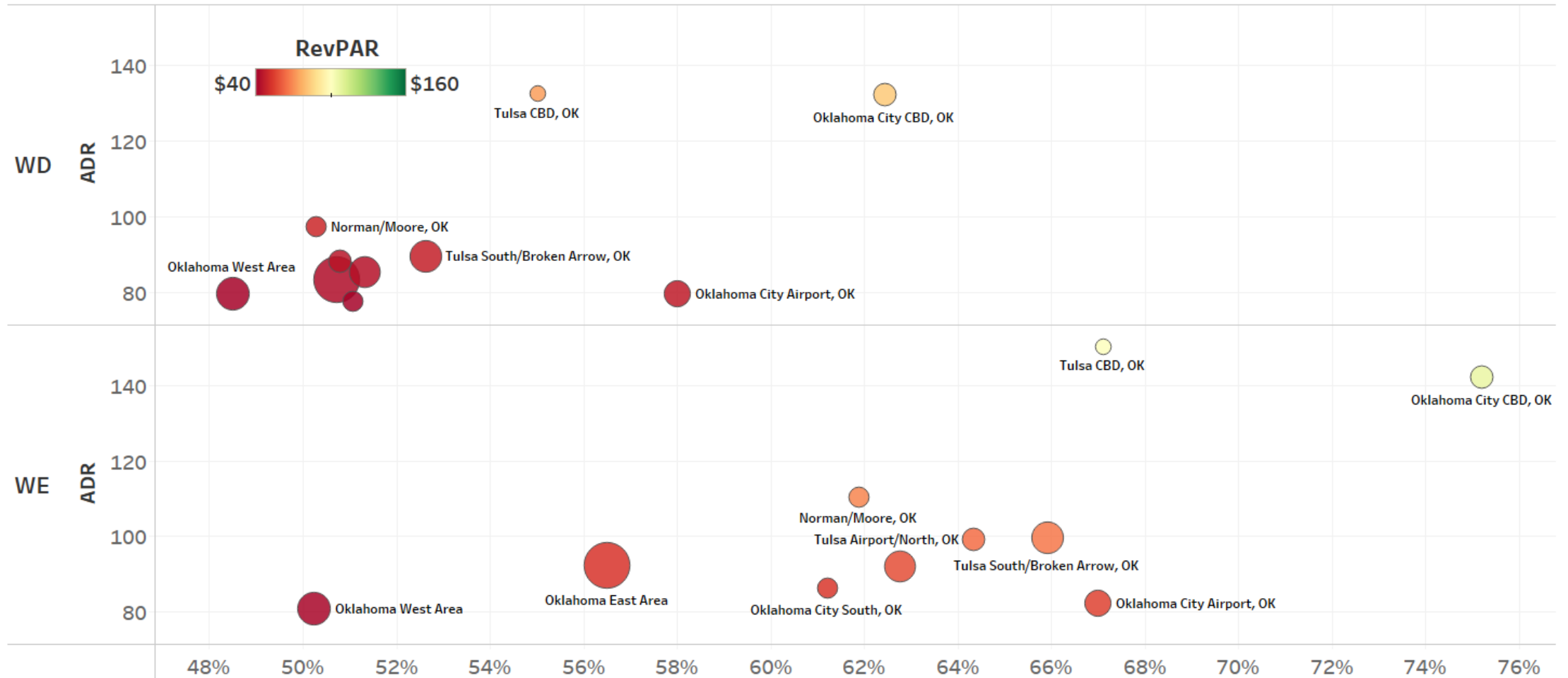
Select Submarkets, R28 August 12<sup>th</sup>, 2023, Weekday vs Weekend



Size of the circles represent room inventory

# Year to Date Performance Only Reinforces That

Select Submarkets, YTD Weekly Performance, Weekday vs Weekend



Size of the circles represent room inventory

# 65 Properties, 7,288 Room

Under Construction, Final Planning, Proposed, OK State, July 2023

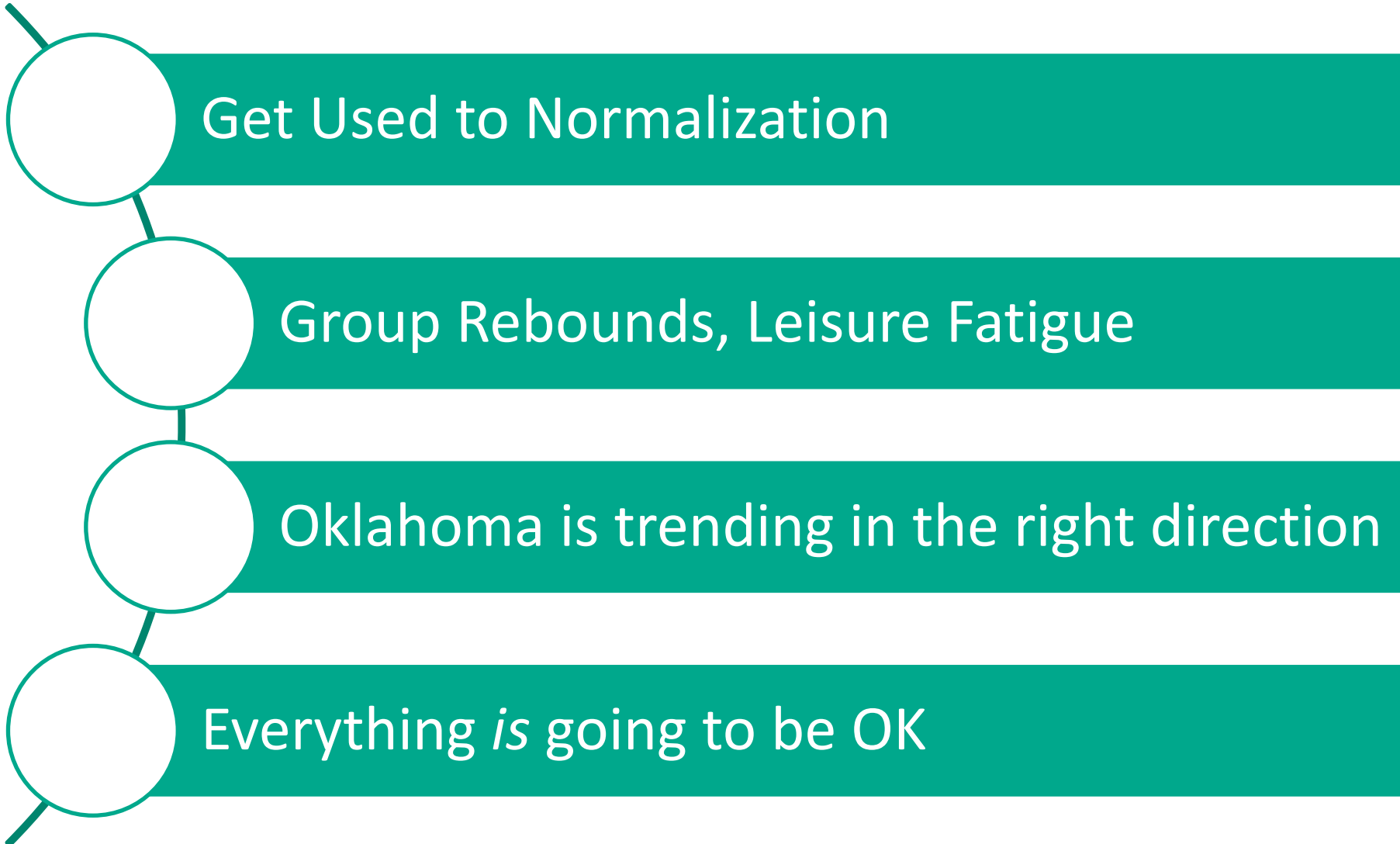
Property Name	Market Name	Submarket Name	Rooms	Brand	Hotel Class	Scale	Operation Type	Constr Status	City
Broadway Tower	Oklahoma Area	Oklahoma West Area	72		Midscale	Independent	Independent	Proposed	Enid
Candlewood Suites Oklahoma City	Oklahoma City	Oklahoma City Airport	84	Candlewood Suites	Midscale	Midscale	Franchise	Final Planning	Oklahoma City
Trademark Collection by Wyndham Tulsa	Tulsa	Tulsa Airport/North	109	Trademark Collection by Wyndham	Upper Midscale	Upper Midscale	Franchise	Final Planning	Tulsa
Home2 Suites by Hilton Tulsa Airport	Tulsa	Tulsa Airport/North	103	Hampton by Hilton	Upper Midscale	Upper Midscale	Franchise	Under Construction	Tulsa
avid Hotel Tulsa Hills	Tulsa	Tulsa South/Broken Arrow	87	Avid	Midscale	Midscale	Franchise	Under Construction	Tulsa
Home2 Suites by Hilton Oklahoma City Bricktown	Oklahoma City	Oklahoma City CBD	125	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Proposed	Oklahoma City
Residence Inn Oklahoma City Norman	Oklahoma City	Norman/Moore	124	Residence Inn	Upscale	Upscale	Franchise	Under Construction	Norman
OKANA Resort & Indoor Waterpark	Oklahoma City	Oklahoma City North	404		Midscale	Independent	Independent	Under Construction	Oklahoma City
Holiday Inn Express Oklahoma City-NW	Oklahoma City	Oklahoma City North	100	Holiday Inn Express	Upper Midscale	Upper Midscale	Franchise	Final Planning	Oklahoma City
Osage Casino Hotel Pawhuska	Tulsa	Tulsa Airport/North	47		Midscale	Independent	Independent	Under Construction	Pawhuska
Avid Oklahoma City Downtown- Bricktown	Oklahoma City	Oklahoma City CBD	95	Avid	Midscale	Midscale	Franchise	Final Planning	Oklahoma City
The Hotel at OAK, Tapestry Collection by Hilton	Oklahoma City	Oklahoma City North	132	Tapestry Collection by Hilton	Upper Upscale	Upper Upscale	Franchise	Under Construction	Oklahoma City
La Quinta Inns & Suites Oklahoma City	Oklahoma City	Oklahoma City Airport	75	La Quinta Inns & Suites	Upper Midscale	Upper Midscale	Franchise	Final Planning	Oklahoma City
Dream Hotels OKC	Oklahoma City	Oklahoma City CBD	220	Dream Hotels	Upper Upscale	Upper Upscale	Chain Management	Proposed	Oklahoma City
Unscripted Oklahoma City	Oklahoma City	Oklahoma City CBD	174	Unscripted	Upper Upscale	Upper Upscale	Franchise	Final Planning	Oklahoma City
Home2 Suites by Hilton Shawnee	Oklahoma Area	Oklahoma East Area	99	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Final Planning	Shawnee
New Osage Casino	Tulsa	Tulsa Airport/North	101		Midscale	Independent	Independent	Under Construction	Bartlesville
Homewood Suites by Hilton Tulsa Downtown	Tulsa	Tulsa CBD	130	Homewood Suites by Hilton	Upscale	Upscale	Franchise	Proposed	Tulsa
Holiday Inn Express & Suites Vinita	Oklahoma Area	Oklahoma East Area	90	Holiday Inn Express	Upper Midscale	Upper Midscale	Franchise	Final Planning	Vinita
Fairfield by Marriott Inn & Suites Tulsa Airport	Tulsa	Tulsa Airport/North	111	Fairfield Inn	Upper Midscale	Upper Midscale	Franchise	Final Planning	Tulsa
Hilton Garden Inn Tulsa Airport	Tulsa	Tulsa Airport/North	109	Hilton Garden Inn	Upscale	Upscale	Franchise	Proposed	Tulsa
Home2 Suites by Hilton Tulsa South	Tulsa	Tulsa South/Broken Arrow	96	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Proposed	Tulsa
Residence Inn by Marriott Tulsa Airport	Tulsa	Tulsa Airport/North	100	Residence Inn	Upscale	Upscale	Franchise	Final Planning	Tulsa
Comfort Inn & Suites Seminole, OK	Oklahoma Area	Oklahoma East Area	78	Comfort Inn	Upper Midscale	Upper Midscale	Franchise	Final Planning	Seminole
Home2 Suites by Hilton Duncan	Oklahoma Area	Oklahoma West Area	80	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Proposed	Duncan
Wyndham Tulsa	Tulsa	Tulsa CBD	120	Wyndham	Upscale	Upscale	Franchise	Proposed	Tulsa
Microtel Inn & Suites by Wyndham El Reno	Oklahoma City	Oklahoma City North	81	Microtel Inn & Suites by Wyndham	Economy	Economy	Franchise	Final Planning	El Reno
La Quinta Inns & Suites Henryetta	Tulsa	Tulsa South/Broken Arrow	81	La Quinta Inns & Suites	Upper Midscale	Upper Midscale	Franchise	Final Planning	Henryetta
TownePlace Suites By Marriott Oklahoma City Yukon	Oklahoma City	Oklahoma City North	93	TownePlace Suites	Upper Midscale	Upper Midscale	Franchise	Under Construction	Yukon
Home2 Suites by Hilton Enid	Oklahoma Area	Oklahoma West Area	83	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Proposed	Enid
Courtyard by Marriott Stillwater	Oklahoma Area	Oklahoma East Area	123	Courtyard	Upscale	Upscale	Franchise	Final Planning	Stillwater
Avid Oklahoma City	Oklahoma City	Oklahoma City North	95	Avid	Midscale	Midscale	Franchise	Final Planning	Oklahoma City
Home2 Suites by Hilton McAlester	Oklahoma Area	Oklahoma East Area	88	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Proposed	McAlester
Holiday Inn Express & Suites Tulsa	Tulsa	Tulsa Airport/North	112	Holiday Inn Express	Upper Midscale	Upper Midscale	Franchise	Proposed	Tulsa
Comfort Inn & Suites Chandler	Oklahoma City	Oklahoma City North	78	Comfort Inn	Upper Midscale	Upper Midscale	Franchise	Proposed	Chandler
Avid	Oklahoma Area	Oklahoma East Area	95	Avid	Midscale	Midscale	Franchise	Proposed	Tahlequah

# 65 Properties, 7,288 Room

Under Construction, Final Planning, Proposed, OK State, July 2023

Property Name	Market Name	Submarket Name	Rooms	Brand	Hotel Class	Scale	Operation Type	Constr Status	City
Holiday Inn Express Poteau OK		Oklahoma East Area	74	Holiday Inn Express	Upper Midscale	Upper Midscale	Franchise	Proposed	Poteau
Block-405 RV&B Resort	Oklahoma City	Oklahoma City CBD	55		Upscale	Independent		Final Planning	Oklahoma City
Holiday Inn Express Cushing	Oklahoma Area	Oklahoma East Area	77	Holiday Inn Express	Upper Midscale	Upper Midscale	Franchise	Under Construction	Cushing
Courtyard by Marriott Tulsa Airport	Tulsa	Tulsa Airport/North	100	Courtyard	Upscale	Upscale	Franchise	Proposed	Tulsa
Autograph Collection Oklahoma City North	Oklahoma City	Oklahoma City North	140	Autograph Collection	Upper Upscale	Upper Upscale	Franchise	Final Planning	Oklahoma City
MainStay Suites Oklahoma City	Oklahoma City	Oklahoma City Airport	35	MainStay Suites	Midscale	Midscale	Franchise	Under Construction	Oklahoma City
Sleep Inn Oklahoma City	Oklahoma City	Oklahoma City Airport	40	Sleep Inn	Midscale	Midscale	Franchise	Final Planning	Oklahoma City
La Quinta Inns & Suites Pryor	Oklahoma Area	Oklahoma East Area	53	La Quinta Inns & Suites	Upper Midscale	Upper Midscale	Franchise	Under Construction	Pryor
La Quinta Inn & Suites Tahlequah	Oklahoma Area	Oklahoma East Area	90	La Quinta Inns & Suites	Upper Midscale	Upper Midscale	Franchise	Proposed	Tahlequah
Home2 Suites by Hilton Tahlequah	Oklahoma Area	Oklahoma East Area	95	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Proposed	Tahlequah
Home2 Suites by Hilton Chickasha	Oklahoma City	Oklahoma City South	83	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Proposed	Chickasha
Hotel at the Boardwalk at Bricktown	Oklahoma City	Oklahoma City CBD	348			Independent	Independent	Final Planning	Oklahoma City
La Quinta Inns & Suites Broken Bow	Oklahoma Area	Oklahoma East Area	80	La Quinta Inns & Suites	Upper Midscale	Upper Midscale	Franchise	Final Planning	Broken Bow
TownePlace Suites by Marriott Oklahoma City Downtown	Oklahoma City	Oklahoma City CBD	88	TownePlace Suites	Upper Midscale	Upper Midscale	Franchise	Final Planning	Oklahoma City
Home2 Suites by Hilton Norman Oklahoma City	Oklahoma City	Norman/Moore	102	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Proposed	Norman
Luxury Hotel at American Heartland Theme Park	Oklahoma Area	Oklahoma East Area	300		Upper Upscale	Independent	Independent	Proposed	Vinita
Three Ponies RV Campground & Resort	Oklahoma Area	Oklahoma East Area	300		Upper Midscale	Independent	Independent	Final Planning	Vinita
Fairfield by Marriott Inn & Suites Pryor	Oklahoma Area	Oklahoma East Area	90	Fairfield Inn	Upper Midscale	Upper Midscale	Franchise	Proposed	Pryor
Home2 Suites by Hilton Broken Arrow	Tulsa	Tulsa South/Broken Arrow	103	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Final Planning	Broken Arrow
La Quinta by Wyndham Oklahoma City	Oklahoma City	Oklahoma City CBD	102	La Quinta Inns & Suites	Upper Midscale	Upper Midscale	Franchise	Proposed	Oklahoma City
Staybridge Suites Oklahoma City - Midwest City	Oklahoma City	Oklahoma City South	100	Staybridge Suites	Upscale	Upscale	Franchise	Proposed	Midwest City
SpringHill Suites By Marriott Oklahoma City Yukon	Oklahoma City	Oklahoma City North	91	SpringHill Suites	Upscale	Upscale	Franchise	Final Planning	Yukon
TownePlace Suites By Marriott Midwest City	Oklahoma City	Oklahoma City South	105	TownePlace Suites	Upper Midscale	Upper Midscale	Franchise	Final Planning	Del City
Embassy Suites by Hilton Oklahoma City Airport	Oklahoma City	Oklahoma City Airport	216	Embassy Suites by Hilton	Upper Upscale	Upper Upscale	Franchise	Proposed	Oklahoma City
Home2 Suites by Hilton Tulsa Midtown	Tulsa	Tulsa South/Broken Arrow	85	Home2 Suites by Hilton	Upper Midscale	Upper Midscale	Franchise	Proposed	Tulsa
Choctaw Landing - Hochatown	Oklahoma Area	Oklahoma East Area	100		Economy	Independent	Independent	Under Construction	Broken Bow
La Quinta Inns & Suites Tulsa	Tulsa	Tulsa South/Broken Arrow	71	La Quinta Inns & Suites	Upper Midscale	Upper Midscale	Franchise	Proposed	Tulsa
Candlewood Suites Oklahoma City - Yukon	Oklahoma City	Oklahoma City North	90	Candlewood Suites	Midscale	Midscale	Franchise	Final Planning	Yukon
Fairfield Inn Seminole	Oklahoma Area	Oklahoma East Area	81	Fairfield Inn	Upper Midscale	Upper Midscale	Franchise	Final Planning	Seminole

# Takeaways





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### Rosewood Mansion On Turtle Creek

2821 Turtle Creek Blvd Dallas, TX 75219 • +1 214-559-2100 • Website

Class	Luxury	Parent	Rosewood Hotel Group	Rooms	142
Market	Dallas - TX	Hotel Operator	Rosewood Hotels & Resorts, Inc	Comp Set Rooms	1,091
Submarket	Dallas CBD/Market Center	Owner	CTF Development Inc	Comp Set Members	5

ROSEWOOD  
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STAR Snapshot Historical

Month of April 2022 | Data as of 24 May 2022

Occupancy	Comp Set Index (MPI)	ADR	Comp Set Index (ARI)	RevPAR	Comp Set Index (RGI)	RevPAR Rank	RevPAR Change Rank
<b>81.1%</b> <span>↑ 41.0%</span>	<b>125.2</b> <span>↑ 9.4%</span>	<b>\$577</b> <span>↑ 0.5%</span>	<b>144.7</b> <span>↓ 20.9%</span>	<b>\$468</b> <span>↑ 41.6%</span>	<b>181.1</b> <span>↓ 13.4%</span>	<b>1 of 6</b>	<b>6 of 6</b>
Prior Year 57.5%	Prior Year 114.4	Prior Year \$575	Prior Year 182.8	Prior Year \$331	Prior Year 209.2	Prior Year 1 of 6	Prior Year

Monthly Apr 2022 Glance Summary Monthly Trend Day of Week Daily Seg Glance Seg Seg Index/Rank Seg Day of Week Add'l Revenue Response

### Monthly Performance at a Glance

Comp Set Industry

### My Property vs. Competitive Set

Month of April 2022 | Data as of 24 May 2022

	April 2022								
	Occupancy			ADR			RevPAR		
	My Property	Comp Set	Index (MPI)	My Property	Comp Set	Index (ARI)	My Property	Comp Set	Index (RGI)
Current Month	81.1%	64.8%	125.2	\$577.40	\$399.11	144.7	\$468.16	\$258.54	181.1
Year to Date	65.5%	58.7%	111.6	\$586.00	\$378.75	154.7	\$384.03	\$222.40	172.7
3 Month Average	70.0%	61.9%	113.1	\$580.68	\$380.51	152.6	\$406.63	\$235.58	172.6
12 Month Average	61.0%	55.8%	109.5	\$601.48	\$365.39	164.6	\$367.20	\$203.77	180.2

	April 2022 vs. 2021 Percent Change								
	Occupancy			ADR			RevPAR		
	My Property	Comp Set	Index (MPI)	My Property	Comp Set	Index (ARI)	My Property	Comp Set	Index (RGI)





# Questions?

# Thank you!

**Luke Veneskey**

Sales Associate, STR

[lveneskey@str.com](mailto:lveneskey@str.com)



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