

BERKADIA[®]

TULSA

MULTIFAMILY MARKET REPORT | MID-YEAR

2025



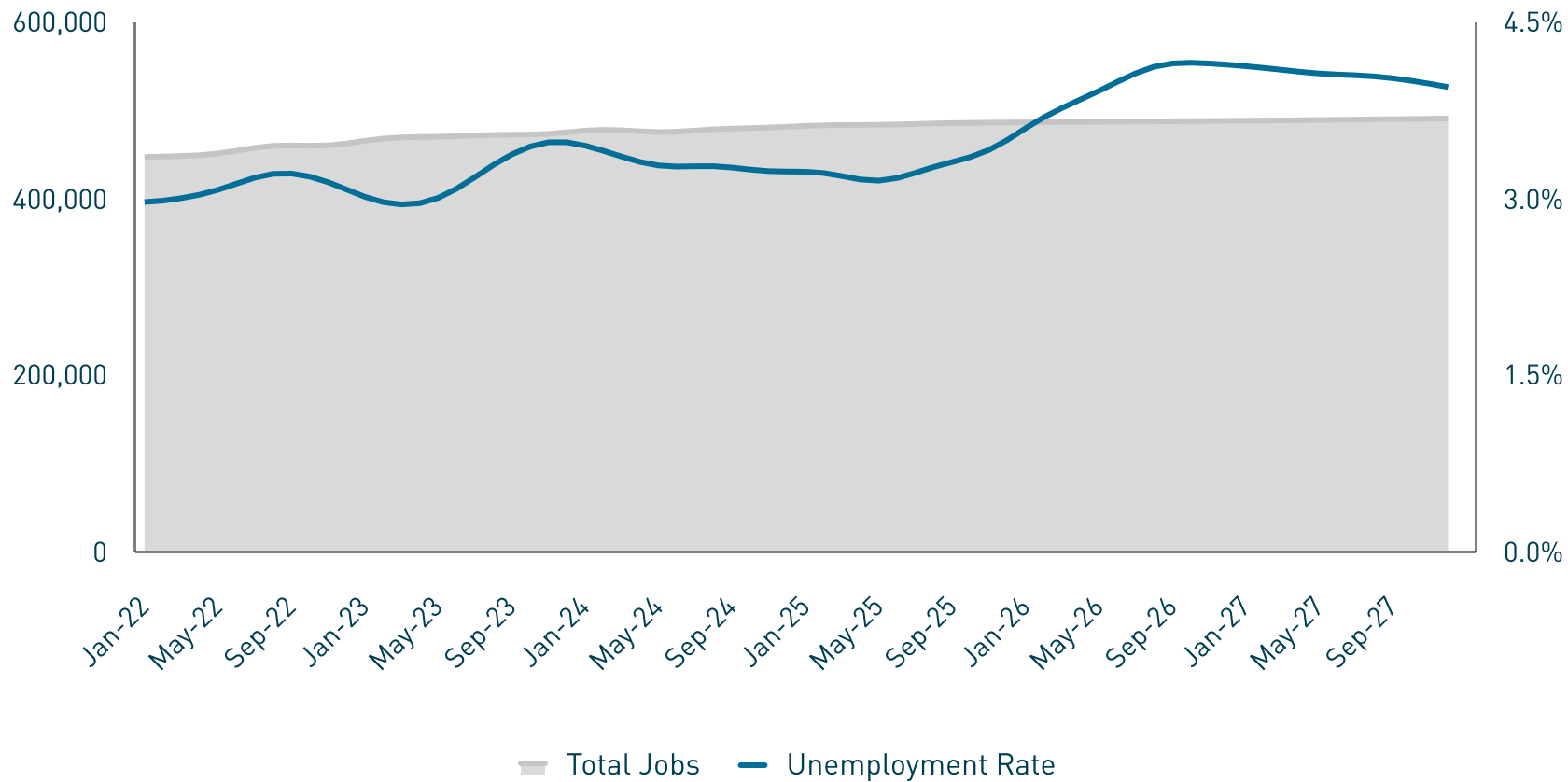
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Employment Trends



Source: Moody's Analytics

Jobs Added / Lost

LAST 12 MONTHS
8,200



1.7% YOY

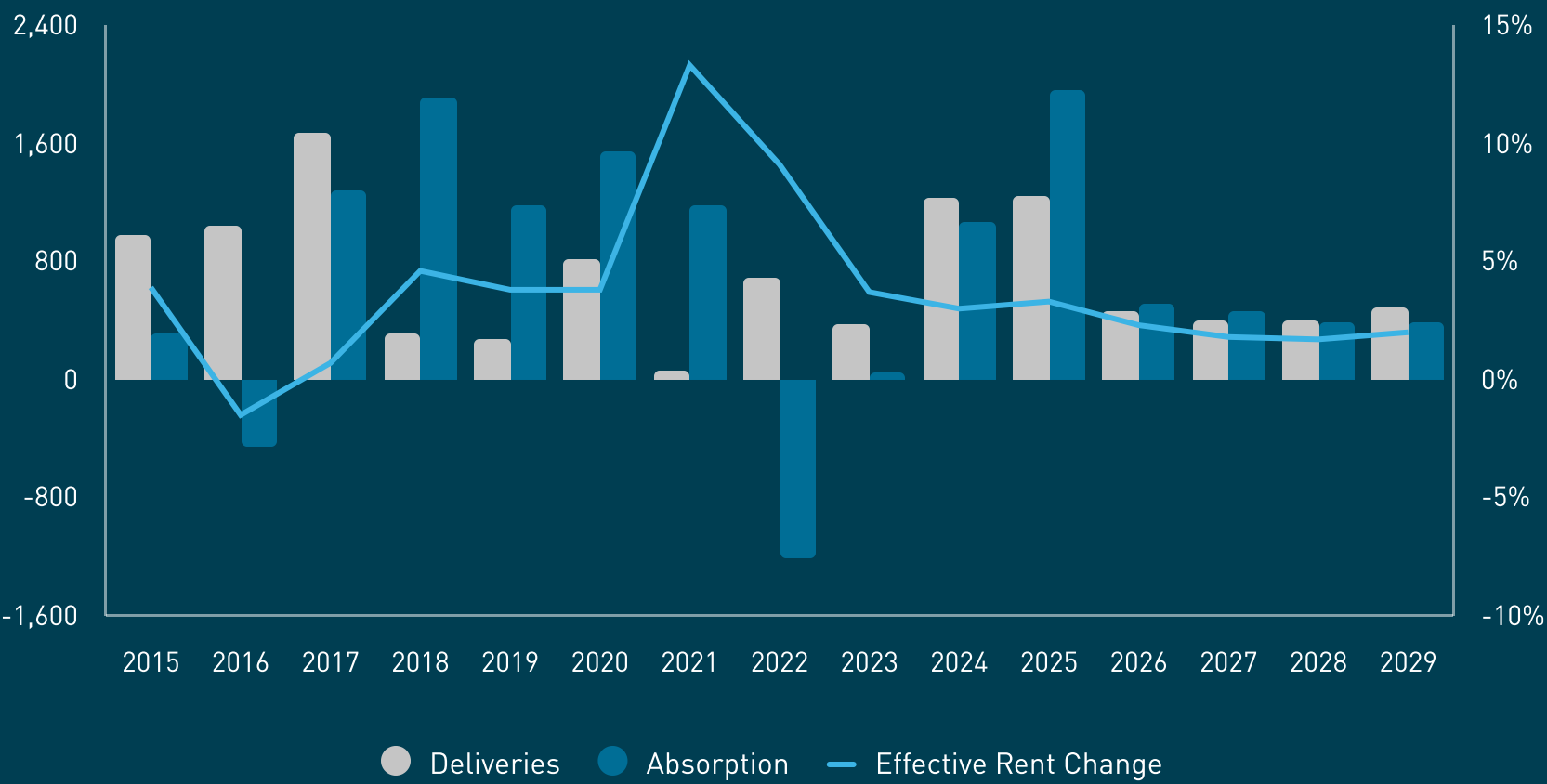
Unemployment

JUNE 2025
3.2%



10 BPS YOY

Deliveries, Absorption, & Effective Rent Change



Source: RealPage



2025 Year to Date

DELIVERIES
593 UNITS

ABSORPTION
1,640 UNITS



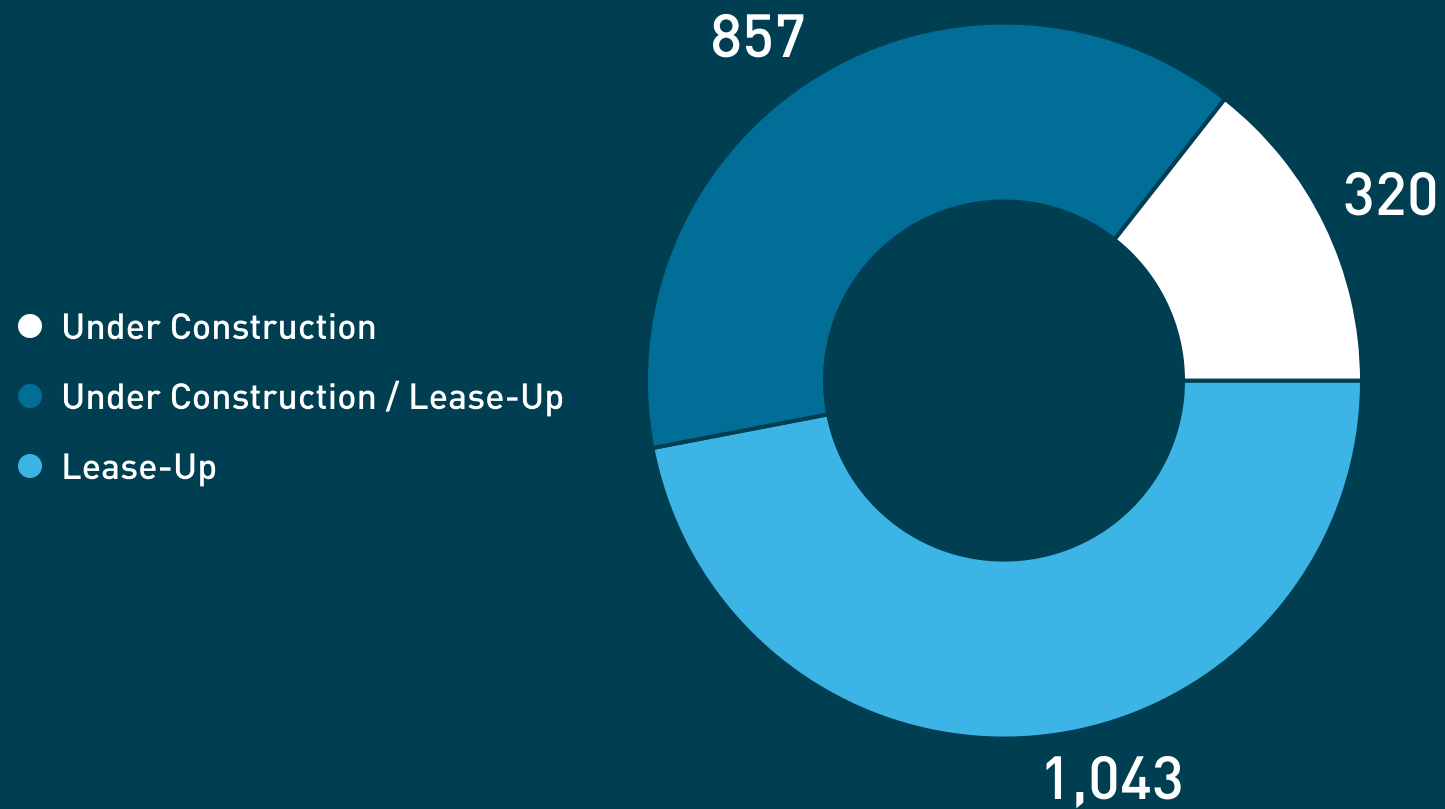
2025 Total*

DELIVERIES
1,237 UNITS

ABSORPTION
1,963 UNITS

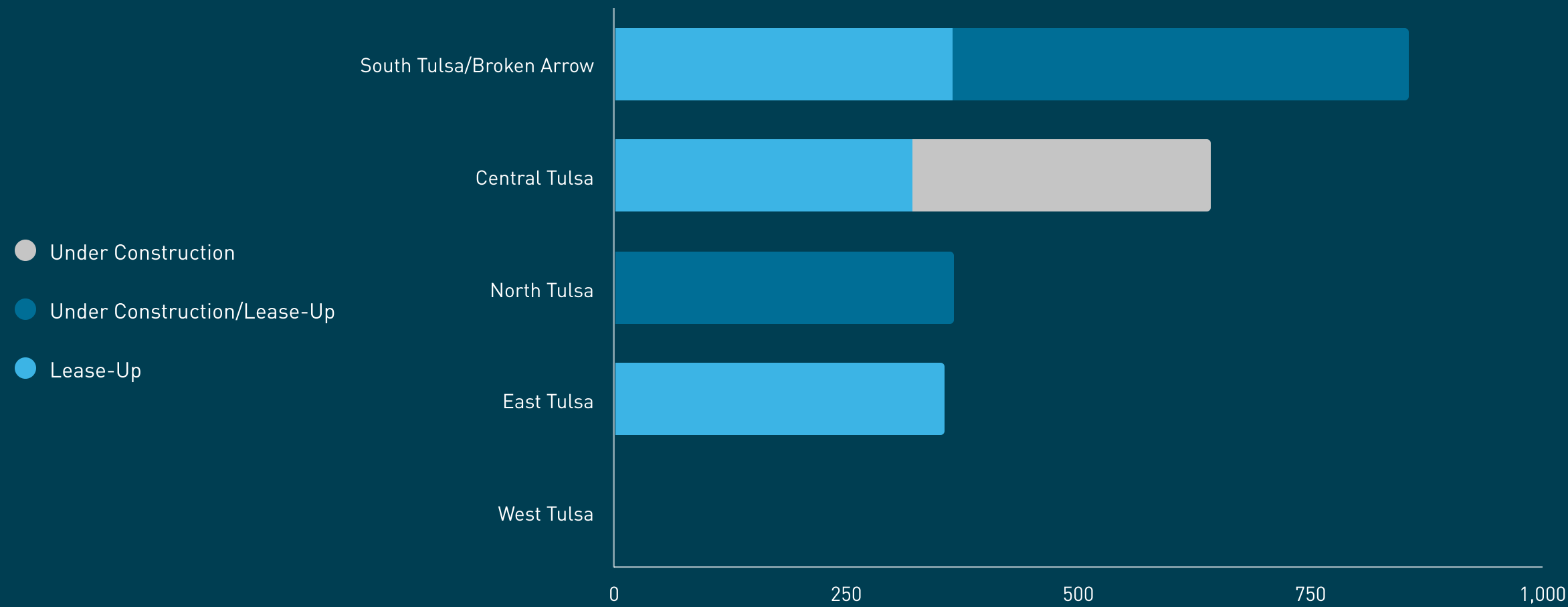
*Projected

Tulsa Pipeline



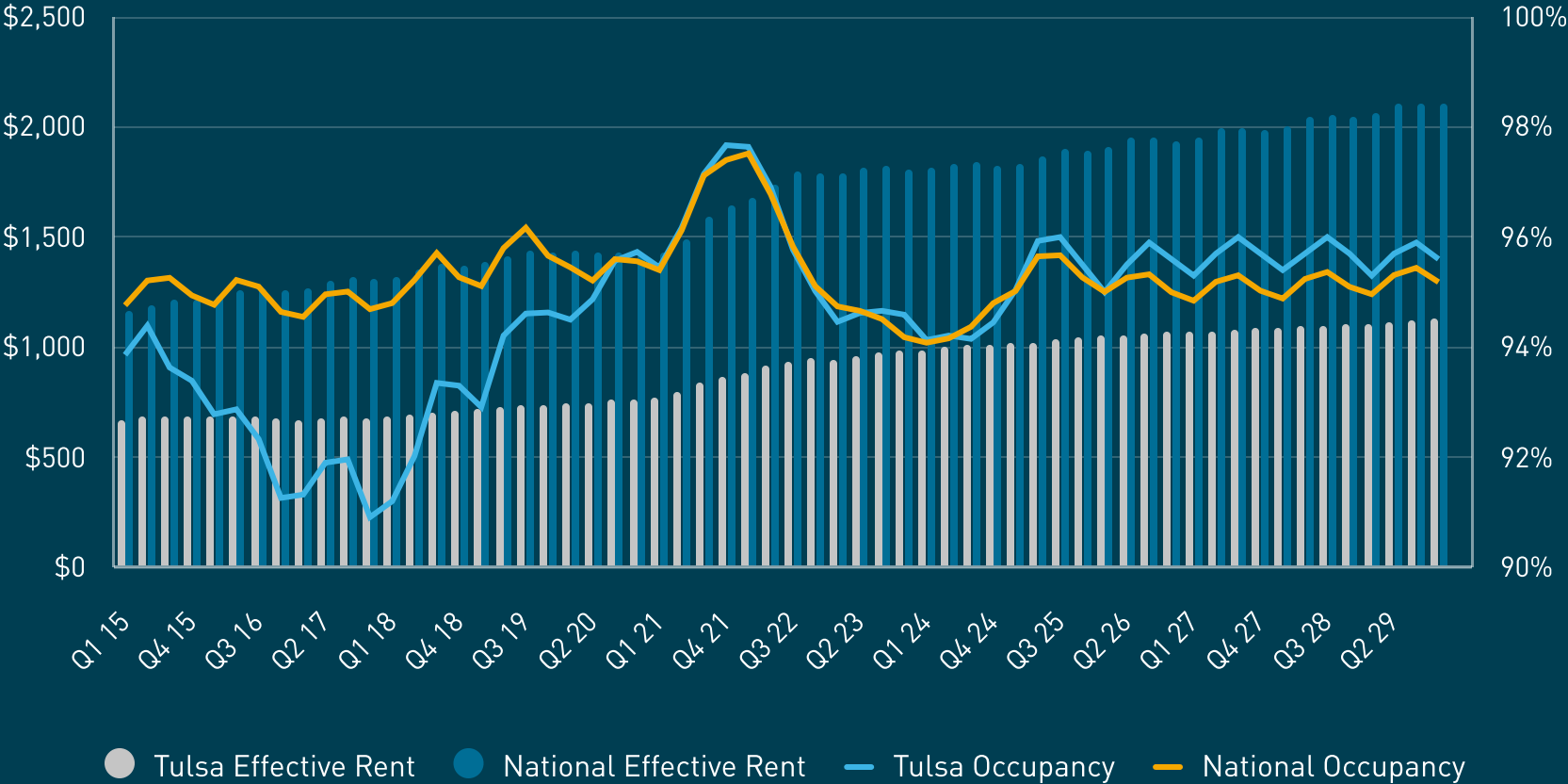
Source: RealPage

Submarket Pipelines



Source: RealPage

Tulsa vs. National Effective Rent & Occupancy



Effective Rent

Q2 2025
\$1,023



2.5% YOY

Occupancy

Q2 2025
95.9%



170 BPS YOY

Source: RealPage

Rent & Occupancy

Submarket Performance

Submarket Name	Q2 25 Occupancy	YOY (BPS)	Q2 25 Effective Rent	YOY
Central Tulsa	95.1%	200	\$916	1.7%
East Tulsa	96.5%	220	\$907	6.3%
North Tulsa	97.0%	190	\$1,113	-0.1%
South Tulsa/Broken Arrow	96.4%	150	\$1,119	1.3%
West Tulsa	94.5%	40	\$1,165	3.3%

Source: RealPage



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