

Candidate Stadium Sites in Pinellas County

July 2016

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I. Overview & Intent

This report is intended to provide an overview of possible candidate sites for a new professional baseball stadium site for the Tampa Bay Rays (“Rays”) in Pinellas County (the “County”). The County acknowledges the widespread desire of the community to keep the Rays in St. Petersburg, Pinellas County or at least the Tampa Bay region, while also acknowledging certain site evaluation criteria expressed by the Rays.

II. History & Context

The Rays have played at Tropicana Field in St. Petersburg, Florida since their inaugural season in 1998. Tropicana Field (f/k/a the Suncoast Dome and the Thunder Dome) opened in 1990 and is owned by Pinellas County, which leases it to the City of St. Petersburg. The Rays have expressed a desire for a new stadium for roughly the past decade. The City of St. Petersburg recently granted the Rays the ability to evaluate sites outside of St. Petersburg; in Pinellas and Hillsborough Counties. The City also formed a “Baseball Forever” committee of local representatives to assist the City’s efforts in finding and supporting a suitable solution in St. Petersburg. Commissioner Ken Welch serves as the County’s representative on this committee.

Representatives from the City of Tampa and Hillsborough County met with the Rays reportedly for the first time on May 31st to discuss possible site alternatives. The City of Oldsmar and other private landowners in Pinellas County have approached the Rays directly on suggested stadium locations. The County, represented by the County Administrator and Commission Chairman, has also met with the Rays to seek input on site selection criteria and other needs. The County is supportive of the City of St. Petersburg’s efforts and is also prepared to assist with evaluation of other candidate sites throughout Pinellas County should it be necessary in the overall mission to keep the Rays in the County. This effort is in keeping with the County’s Strategic Plan in many respects, most importantly, to Foster Continual Economic Growth and Vitality.

III. Site Evaluation Process

The Rays have not announced any timeline or specific plan for site evaluation or a selection decision. A copy of the Ray’s “Tampa Bay Rays New Ballpark Site Evaluation Process Document” is included in this report. The Document highlights and explains several considerations and criteria to be used in the evaluation process, including the following:

- Catalyst for Development
- Local Authenticity
- Regional Connectivity
- Site Accessibility
- Size and Geometry (approx. 20 acres)
- Financial Feasibility and Development Readiness

The Document does not prioritize or provide any scale or weight to the criteria used to determine candidate sites. In addition, the Rays have articulated the need for strong demographic site characteristics including population and employment densities, and ease of access.

The County utilized ESRI Community Analyst for this Report. Community Analyst is a web-based solution that applies GIS technology to extensive demographic, consumer spending, and business data to provide site analysis, reports and drive time mapping.

IV. Pinellas County Candidate Sites

A high level analysis of existing sites in Pinellas County that could meet the evaluation criteria was conducted by Pinellas County staff. Based on Mayor Kriseman's public statements favoring Tropicana Field, no other sites in the City of St. Petersburg have been included at this time. The following identified sites have been listed geographically from south to north, and no other prioritization should be attributed to the order of this listing:

1. Tropicana Field
2. Derby Lane
3. Cheezum Property
4. Sunshine Speedway
5. Glasbrenner Property
6. Airco
7. Orange Blossom Groves/Norris
8. Clearwater Cay
9. Kenyon Dodge Dealership
10. Oldsmar Race Track Road

Finally, Pinellas County staff has not determined the interest of the owners or site constructability relevant to the above candidate sites.

Tampa Bay Rays New Ballpark Site Evaluation Process Document

Guiding Vision

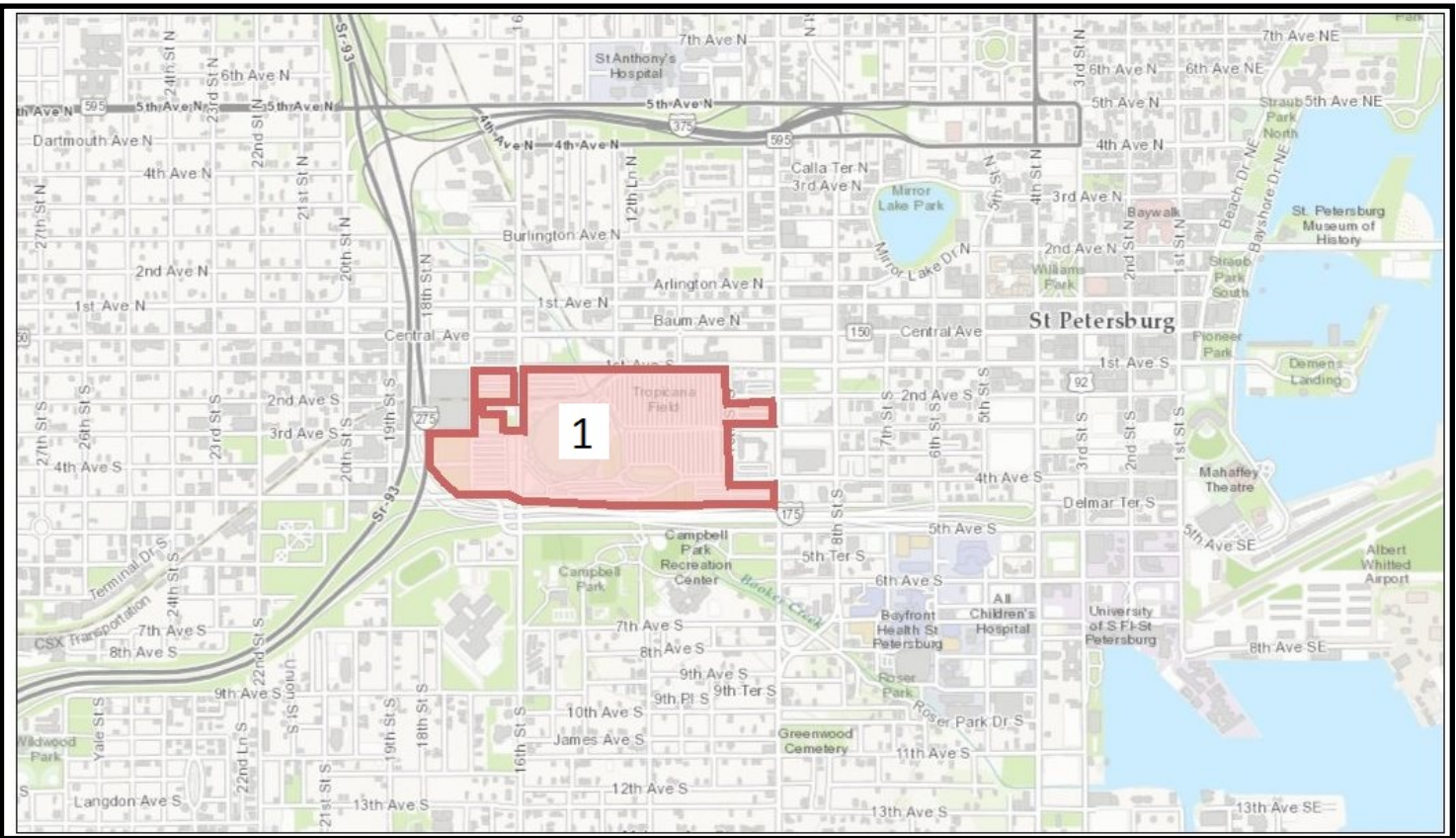
Twenty-four years ago, Camden Yards opened as home of the Baltimore Orioles, and ushered in a new era of ballpark design and construction. The key design principles that guided this iconic project a generation ago still apply – integration, innovation and impact. These principles are carried across the realms of architectural design, community place-making and fan engagement. However, much has changed since Camden Yards opened in 1992. Fans interact with the game differently, interact with each other differently and even think differently. Technology continues to change the way fans consume the game – it has gotten smaller, easier, faster and more universal. There has been an evolution from spectator culture to participant culture. The in-ballpark consumer expects an interconnected, one-of-a-kind experience in a truly authentic setting, and the traditional ballpark model should be adapted for the evolving fan.

To be economically sustainable, maximize public use and be a true community asset, we should have a flexible, accommodating and accessible ballpark, all while providing a superior fan experience. We will be stewards of the public's investment and be responsible with our own resources. The public and the Rays expect a return on their investments. The days of giant stadia with deep, vast seating sections, huge upper decks, one-size-fits-all premium areas and full-service restaurants are coming to a close. To be successful, we need to have a collection of intimate neighborhoods within the ballpark that cater to each fan segment and create a home venue that provides a competitive advantage for the Rays. Right-sizing the ballpark to maximize the fan experience is critical.

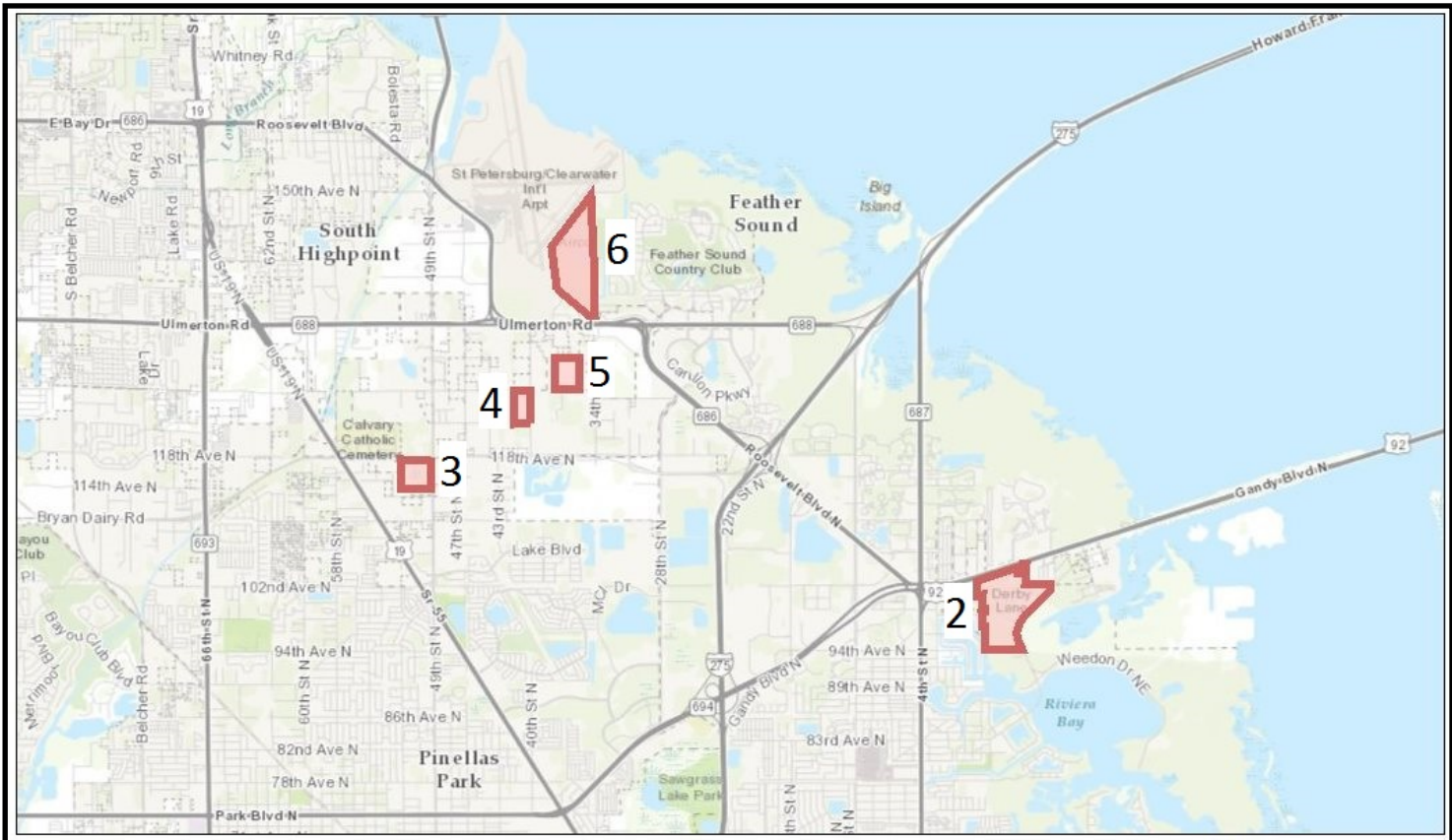
One thing that has not changed is the game of baseball. Baseball remains a timeless tradition. Our job is to push the limits of ballpark design, reimagine what it is like to experience a live baseball game and repackage it for generations to come. We will build an authentic, fan-forward, flexible, smart and sustainable ballpark that will be the pride of Tampa Bay and the home of champions.

Evaluation Process

- Step 1** Analyze strengths and weaknesses of regional business centers in Pinellas and Hillsborough Counties including the municipalities of St. Petersburg and Tampa.
- Step 2** Identify and evaluate sites against the following criteria:
- **Catalyst for Development** – Create an authentic sense of place surrounding the facility and develop a come early-stay late culture around home games. The site and the surrounding area should offer, now or the ability to develop in the future, a wide range of entertainment, dining and retail amenities that create a unique identity for the team and positively impact the game day experience for fans.
 - **Local Authenticity** – The architecture, views, amenities and overall identity of the ballpark and surrounding area should represent what is best about the Tampa Bay region. Local flavor and cutting edge design should intersect at the new ballpark. It should be a celebration of Tampa Bay and include iconic elements that positively impact the ballpark brand, the brand of the team and the image of the region. It should honor the rich history of baseball in Tampa Bay and be known as an accessible community asset. It should be the pride of the region and the envy of baseball.
 - **Regional Connectivity** – The site of the Rays new ballpark should maximize connectivity to the region's existing and growing population centers and business districts. Proximity to existing and potential future mass transit opportunities is also important.
 - **Site Accessibility** – The site should be easily accessible from the local and regional roadway network. Sufficient parking infrastructure, existing or proposed, to serve a majority of the ballpark attendees should be within walking distance.
 - **Size and Geometry** – The site should be approximately 20 acres in size and support the geometry necessary to accommodate a professional baseball playing surface.
 - **Financial Feasibility and Development Readiness** – The ability to structure a public-private partnership that would support the construction of the Rays next generation ballpark is critical. The site should also have few impediments for timely development.
- Step 3** Determine if there is a site that meets the above criteria.



Site 1—Tropicana Field



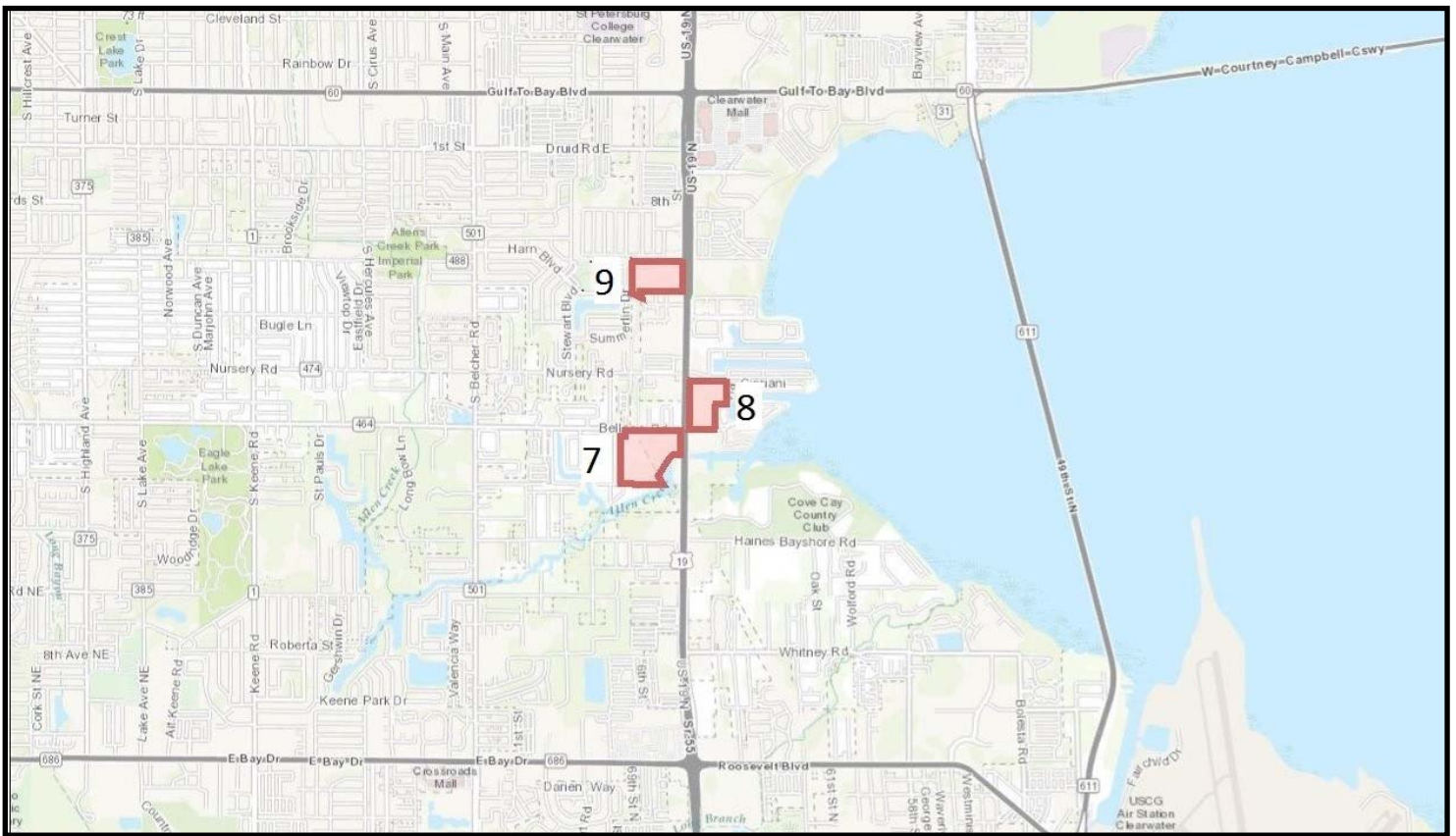
Site 2—Derby Lane

Site 5—Glasbrenner

Site 3—Cheezem

Site 6—Airco

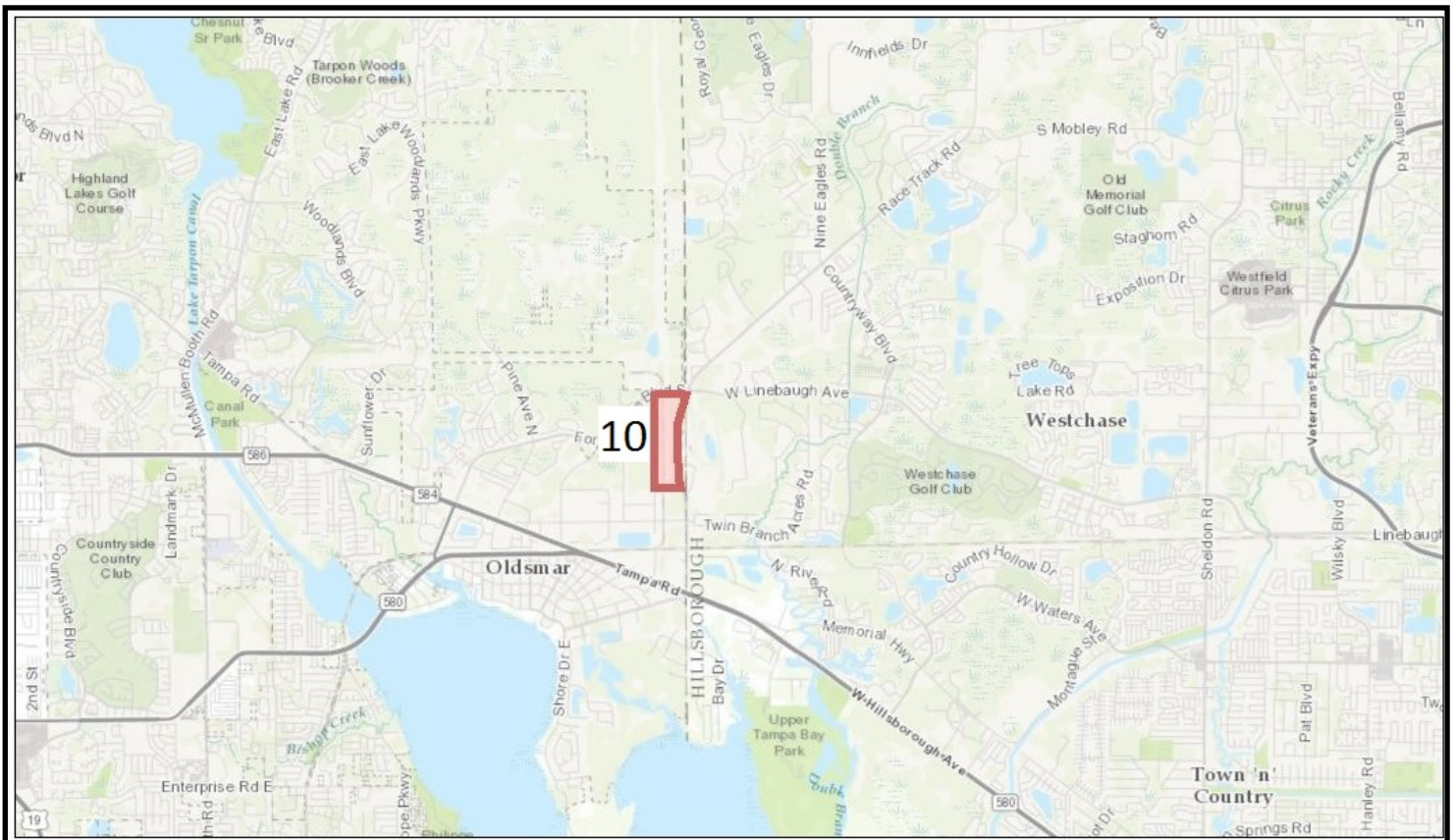
Site 4—Sunshine Speedway



Site 7—Orange Blossom Groves/Norris

Site 8—Clearwater Cay

Site 9—Kenyon Dodge Dealership



Site 10 - Oldsmar Race Track Road

Candidate Stadium Sites in Pinellas County

ID	Site Name	30 Minute Drive Time				Median Household Income
		Businesses	Employees	Households	Population	
1	Tropicana Field	43,550	545,619	365,514	816,065	\$43,916
2	Derby Lane	66,954	815,752	559,843	1,284,999	\$43,862
3	Cheezem	66,635	790,039	571,852	1,296,313	\$45,105
4	Sunshine Speedway	66,505	791,020	569,650	1,293,267	\$45,182
5	Glasbrenner	65,768	785,189	582,062	1,273,618	\$44,917
6	Airco	67,762	804,969	579,994	1,322,693	\$45,104
7	Orange Blossom Grove/Norris	60,789	713,858	532,159	1,225,947	\$45,452
8	Clearwater Cay	55,141	637,800	498,152	1,125,189	\$45,213
9	Kenyon Dodge Dealership	54,723	628,112	487,974	1,101,212	\$45,237
10	Oldsmar Race Track Road	55,423	633,690	448,551	1,065,761	\$46,714

ID	Site Name	Acreage	Ownership	Jurisdiction	Address
1	Tropicana Field	86.0	Public	St. Petersburg	One Tropicana Drive
2	Derby Lane	134.5	Private	Unincorporated	10490 Gandy Blvd. N
3	Cheezem	33.0	Private	Pinellas Park	SW Corner of 118th Ave. & 49th St.
4	Sunshine Speedway	19.5	Public	Pinellas Park	12501 40th Street N
5	Glasbrenner	29.5	Private	Pinellas Park	3565 126th Ave.
6	Airco	127.8	Public	Unincorporated	13690 Stonybrook Drive
7	Orange Blossom Grove/Norris	34.9	Private	Unincorporated	SW Corner of US 19 & Belleair Rd.
8	Clearwater Cay	19.9	Private	Clearwater	NE Corner of US 19 & Belleair Rd.
9	Kenyon Dodge Dealership	21.2	Private	Clearwater	19320 & 19400 US Hwy 19 N
10	Oldsmar Race Track Road	88.4	Private	Oldsmar	SE Corner Forest Lake & Race Track Rd

Sources: ESRI Community Analyst 2015, Pinellas County Property Appraiser

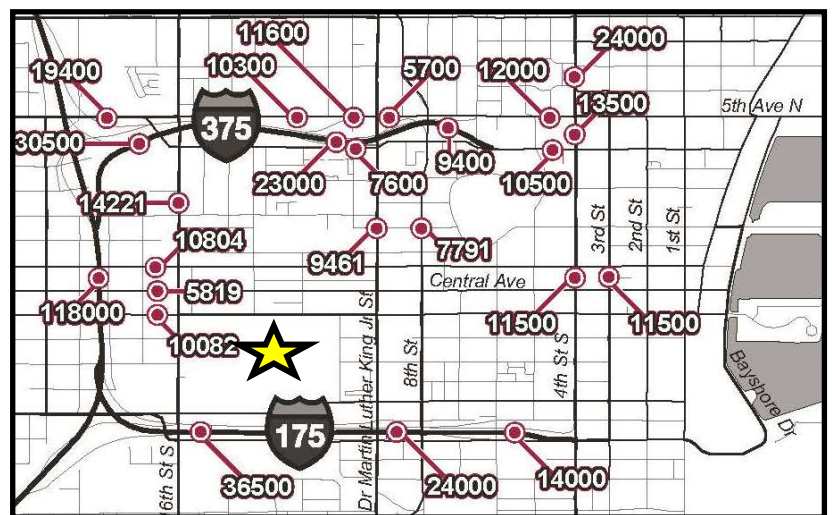
Site 1—Tropicana Field

Site Highlights

- ✓ High Development Potential
- ✓ Excellent Accessibility
- ✓ Excess Size & Geometry
- ✓ Authentic Downtown
- ✓ Development Ready
- ✓ Owned by Pinellas County



2015 Demographics	5 Min. Drive	15 Min. Drive	30 Min. Drive
Businesses	2,632	13,457	43,550
Employees	30,466	168,940	545,619
Population	31,862	284,315	816,065
Households	13,030	127,896	365,514
Median Household Income	\$ 27,116	\$ 41,312	\$ 43,916
Source : ESRI Community Analyst 2015			
Address	One Tropicana Drive		
Jurisdiction	St. Petersburg		
Ownership	Public		
Approx. Acres	86		



Pinellas MPO 2014 Average Annual Daily Traffic Counts

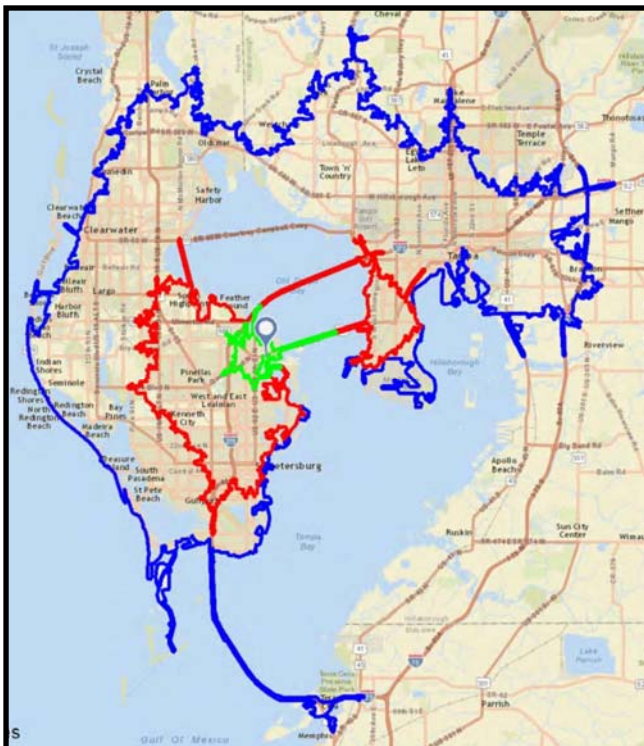
Site 2- Derby Lane

Site Highlights

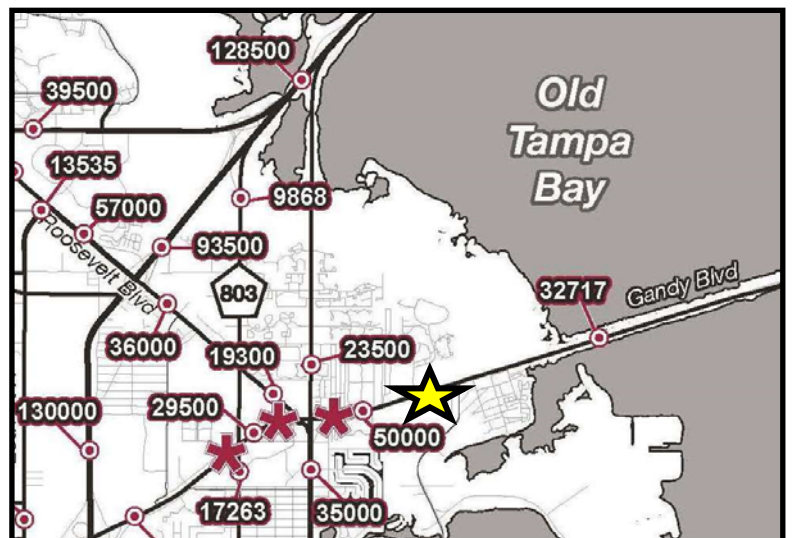
- ✓ High Development Potential
- ✓ Excellent Regional Connectivity & Access
- ✓ Excess Size & Geometry
- ✓ Potential Bay Views
- ✓ Single Owner



2015 Demographics	5 Min. Drive	15 Min. Drive	30 Min. Drive
Businesses	757	15,671	66,954
Employees	19,696	206,361	815,752
Population	20,559	290,025	1,284,999
Households	10,489	128,742	559,843
Median Household Income	\$ 44,755	\$ 43,324	\$ 43,862
Source : ESRI Community Analyst 2015			
Address	10490 Gandy Blvd. N		
Jurisdiction	Unincorporated		
Ownership	Private		
Approx. Acres	135		



ESRI 5, 15, 30 Minute Drive Times



Pinellas MPO 2014 Average Annual Daily Traffic Counts

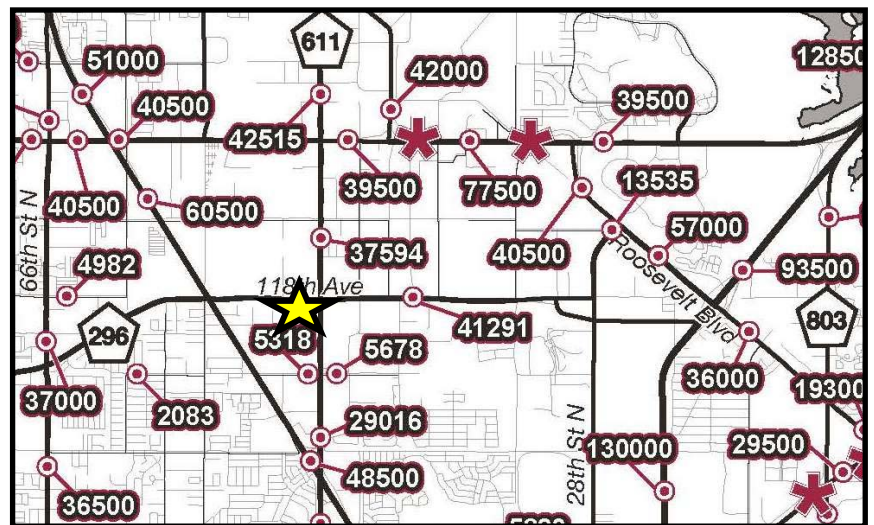
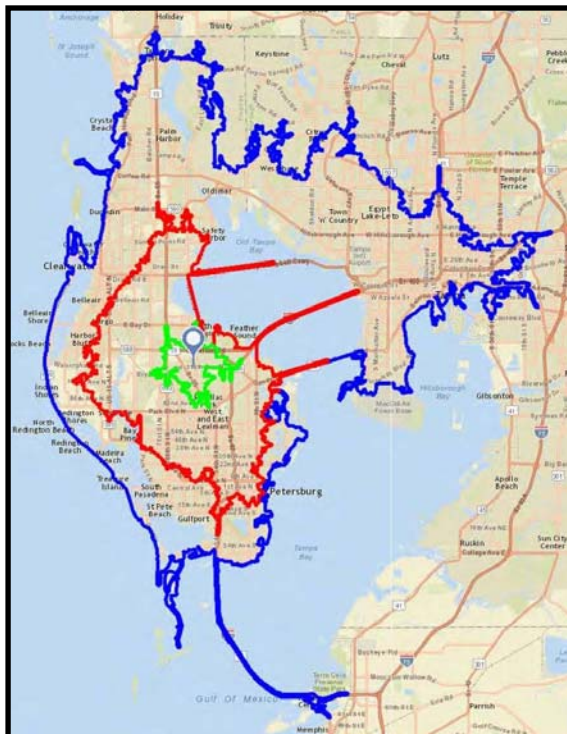
Site 3—Cheezem

Site Highlights

- ✓ Good Regional Access & Connectivity
- ✓ Future Expressway Location
- ✓ Good Size & Geometry
- ✓ Mostly Single Owner (small County-owned parcel)



2015 Demographics	5 Min. Drive	15 Min. Drive	30 Min. Drive
Businesses	2,187	20,813	66,635
Employees	37,411	277,021	790,039
Population	18,940	410,353	1,296,313
Households	6,976	184,755	571,852
Median Household Income	\$ 41,516	\$ 41,283	\$ 45,105
Source : ESRI Community Analyst 2015			
Address	SW corner of 118th Avenue North and 49th Street		
Jurisdiction	Pinellas Park		
Ownership	Private (2.11 acres publicly owned on southwest portion of parcel)		
Approx. Acres	33		



Pinellas MPO 2014 Average Annual Daily Traffic Counts

ESRI 5, 15, 30 Minute Drive Times

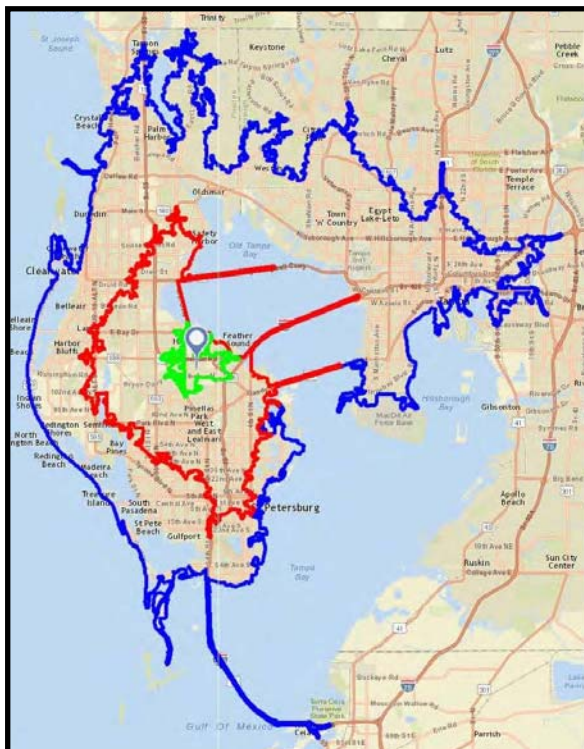
Site 4—Sunshine Speedway

Site Highlights

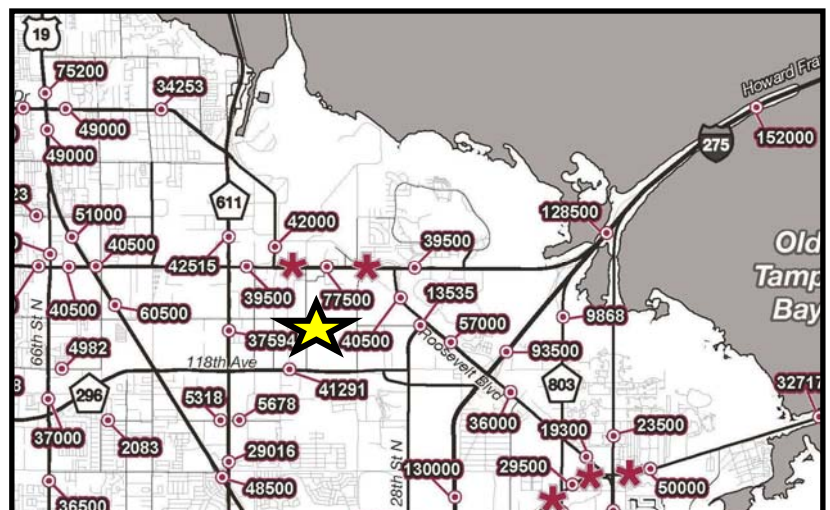
- ✓ Possible Access to Gateway Express
- ✓ Owned by FDOT
- ✓ Adequate Size (potential for more acreage—publicly owned by State and County)



2015 Demographics	5 Min. Drive	15 Min. Drive	30 Min. Drive
Businesses	1,633	16,898	66,505
Employees	37,869	237,930	791,020
Population	5,520	323,388	1,293,267
Households	1,156	144,362	569,650
Median Household Income	\$ 51,107	\$ 41,631	\$ 45,182
Source : ESRI Community Analyst 2015			
Address	12501 40th Street N		
Jurisdiction	Pinellas Park		
Ownership	Public		
Approx. Acres	20		



ESRI 5, 15, 30 Minute Drive Times

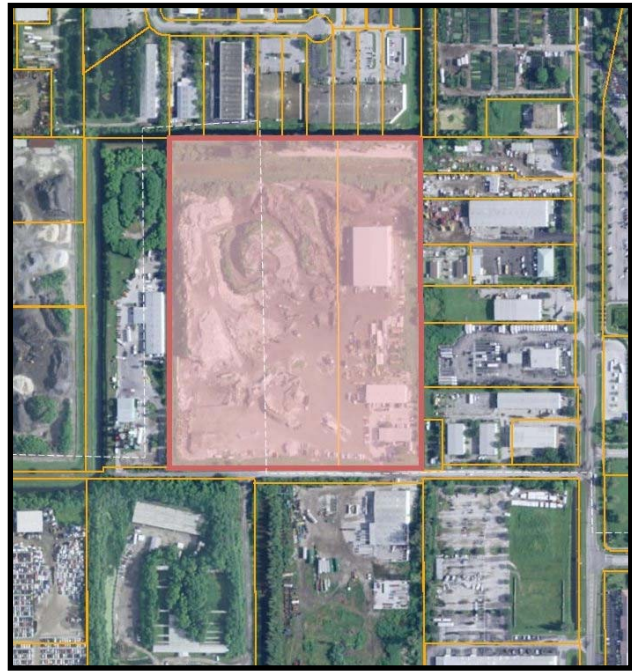


Pinellas MPO 2014 Average Annual Daily Traffic Counts

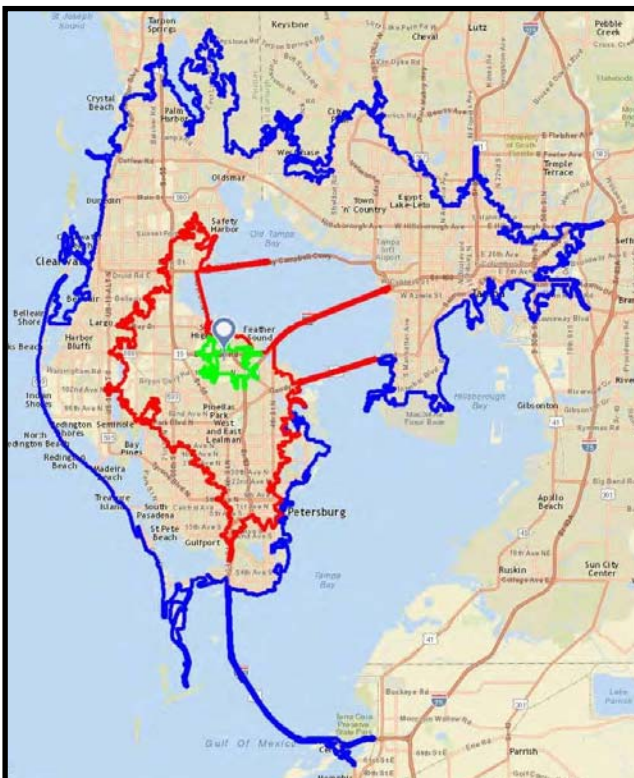
Site 5—Glasbrenner

Site Highlights

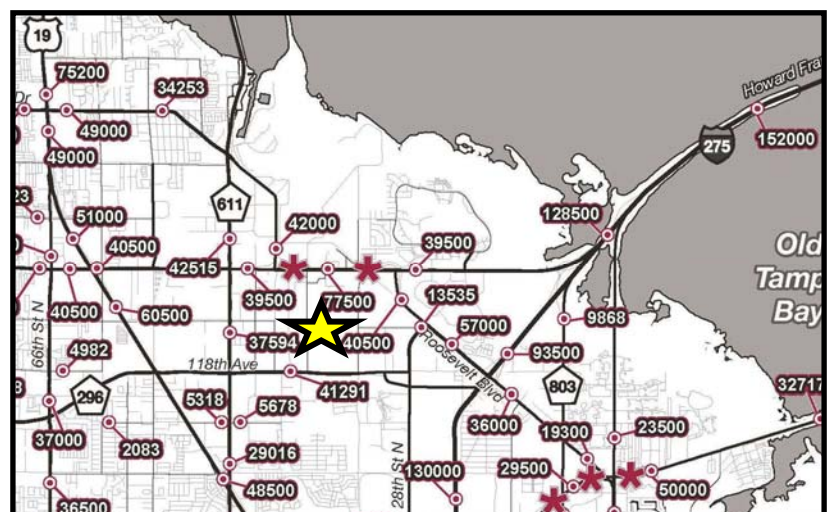
- ✓ Possible Access to Gateway Express
- ✓ Good Size & Geometry
- ✓ Single Owner



2015 Demographics	5 Min. Drive	15 Min. Drive	30 Min. Drive
Businesses	855	16,076	65,768
Employees	22,850	226,807	785,189
Population	801	285,676	1,273,618
Households	469	127,930	582,062
Median Household Income	\$ 58,262	\$ 41,033	\$ 44,917
Source : ESRI Community Analyst 2015			
Address	3565 126th Avenue		
Jurisdiction	Pinellas Park		
Ownership	Private		
Approx. Acres	30		



ESRI 5, 15, 30 Minute Drive Times



Pinellas MPO 2014 Average Annual Daily Traffic Counts

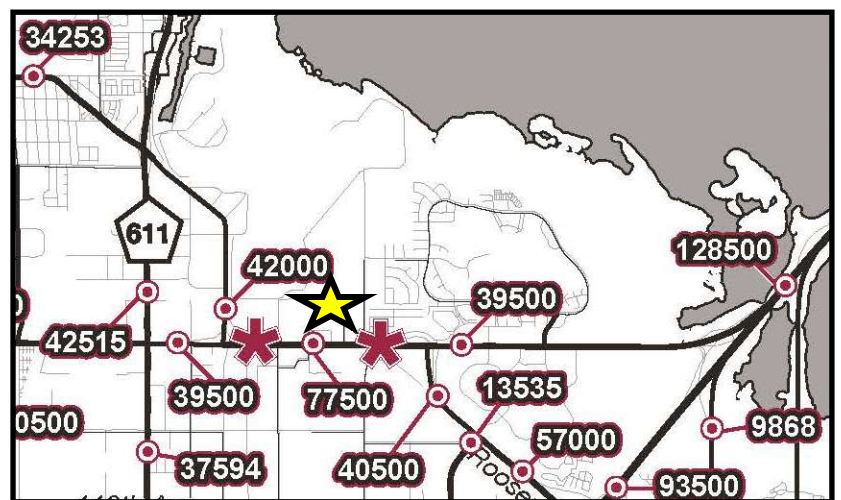
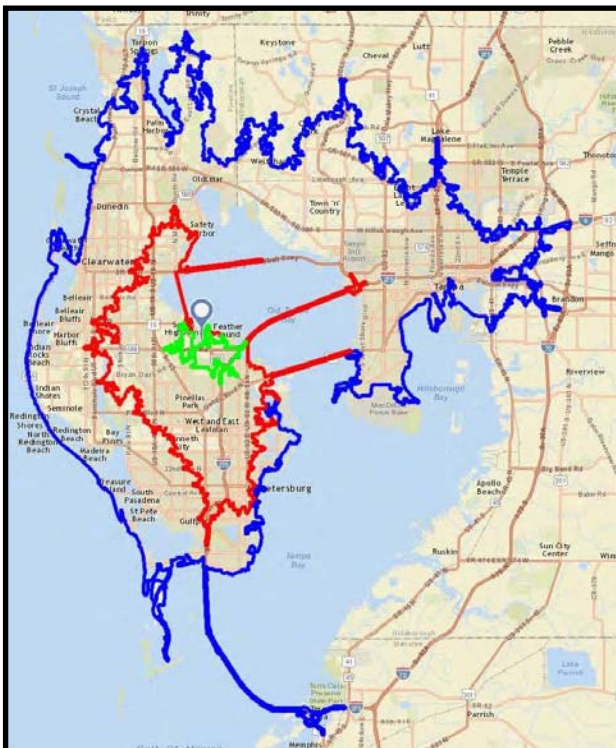
Site 6—Airco

Site Highlights

- ✓ High Development Potential
- ✓ Good Access to Ulmerton Road
- ✓ Excess Size & Geometry
- ✓ Owned by St. Petersburg/Clearwater Airport



2015 Demographics	5 Min. Drive	15 Min. Drive	30 Min. Drive
Businesses	1,036	7,086	67,762
Employees	26,138	238,064	804,969
Population	3,156	301,057	1,322,693
Households	1,649	135,387	579,994
Median Household Income	\$ 55,515	\$ 41,284	\$ 45,104
Source : ESRI Community Analyst 2015			
Address	13690 Stonybrook Drive		
Jurisdiction	Unincorporated		
Ownership	Public		
Approx. Acres	128		



Pinellas MPO 2014 Average Annual Daily Traffic Counts

ESRI 5, 15, 30 Minute Drive Times

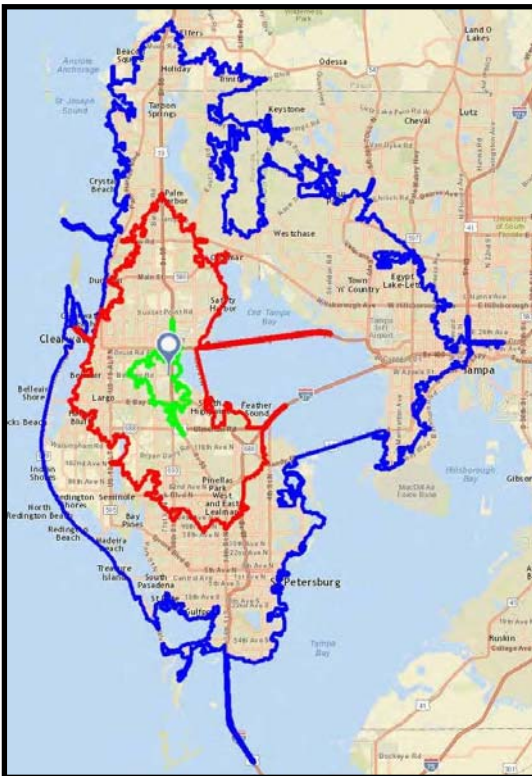
Site 7—Orange Blossom Grove/ Norris Dealership

Site Highlights

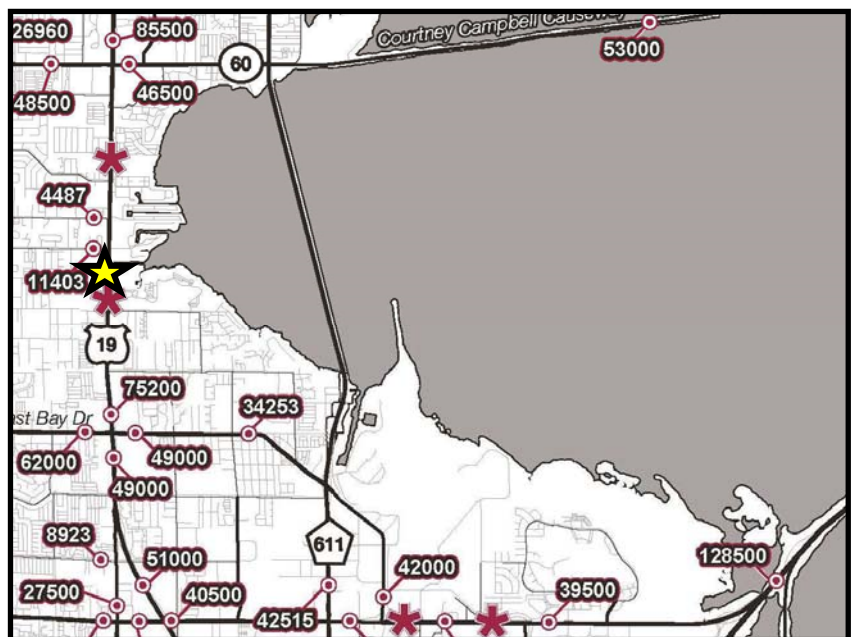
- ✓ Good Regional Access (both US19 Frontage Roads)
- ✓ Good Size & Geometry
- ✓ Possible Acreage for Parking to North
- ✓ Potential Bay and Creek Views
- ✓ Future Pinellas Trail



2015 Demographics	5 Min. Drive	15 Min. Drive	30 Min. Drive
Businesses	910	20,095	60,789
Employees	10,854	266,780	713,858
Population	23,213	374,062	1,225,947
Households	10,652	165,748	532,159
Median Household Income	\$ 46,435	\$ 42,000	\$ 45,452
Source : ESRI Community Analyst 2015			
Address	SW corner US Hwy 19 N and Belleair Road		
Jurisdiction	Unincorporated		
Ownership	Private		
Approx. Acres	35		



ESRI 5, 15, 30 Minute Drive Times



Pinellas MPO 2014 Average Annual Daily Traffic Counts

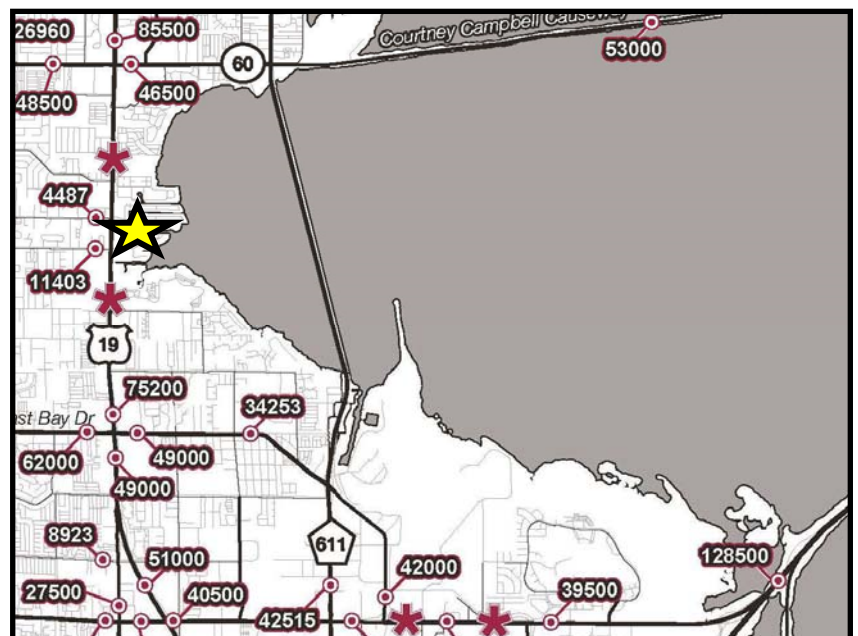
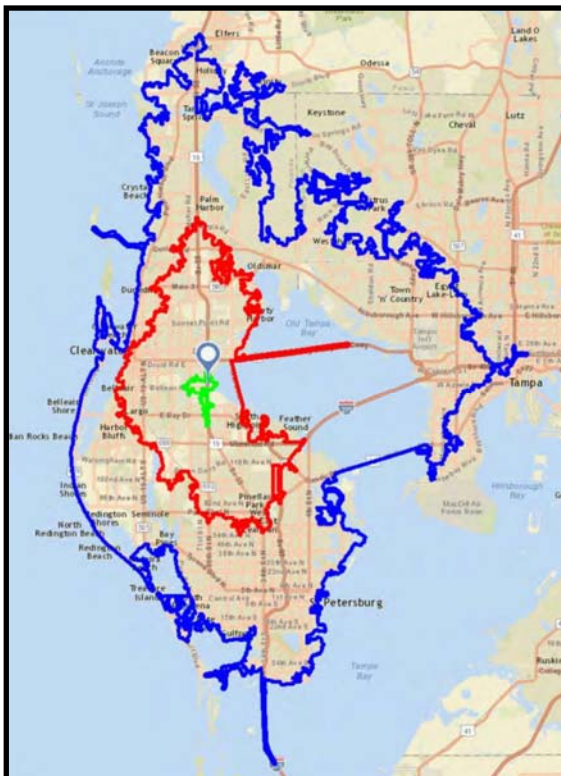
Site 8—Clearwater Cay

Site Highlights

- ✓ Good Regional Access (both US19 Frontage Roads)
- ✓ Potential Bay Views
- ✓ Adequate Size
- ✓ Possible Acreage for Parking to South



2015 Demographics	5 Min. Drive	15 Min. Drive	30 Min. Drive
Businesses	186	16,858	55,141
Employees	2,775	215,244	637,800
Population	5,100	286,906	1,125,189
Households	2,658	128,870	498,152
Median Household Income	\$ 43,159	\$ 41,331	\$ 45,213
Source : ESRI Community Analyst 2015			
Address	NE corner of US Hwy 19 N and Belleair Road		
Jurisdiction	Clearwater		
Ownership	Private		
Approx. Acres	20		



Pinellas MPO 2014 Average Annual Daily Traffic Counts

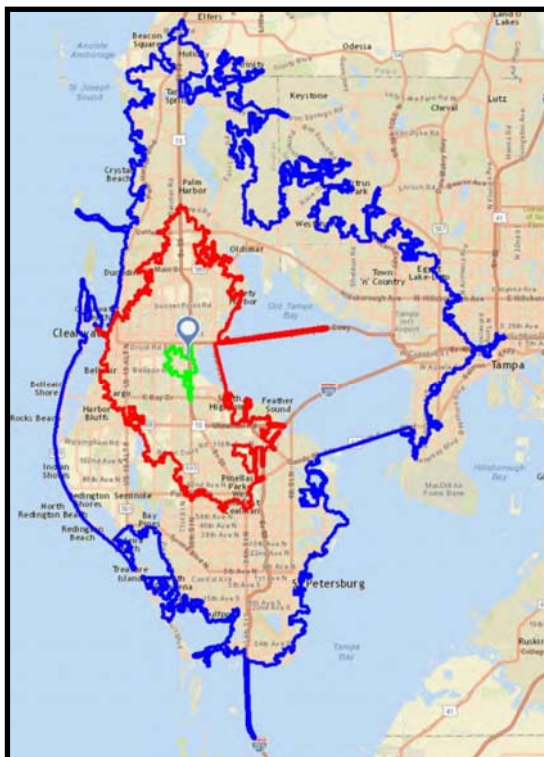
Site 9—Kenyon Dodge

Site Highlights

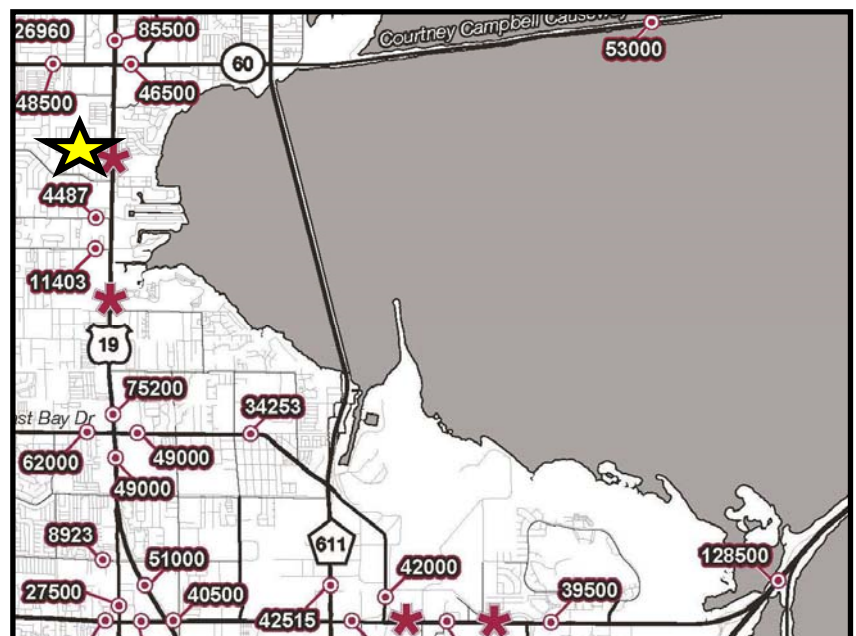
- ✓ Useable Size & Geography
- ✓ Possible Bay Views
- ✓ Future Pinellas Trail
- ✓ Possible Acreage for Parking along Power Lines
- ✓ Majority is Single Owner



2015 Demographics	5 Min. Drive	15 Min. Drive	30 Min. Drive
Businesses	275	16,576	54,723
Employees	3,335	208,949	628,112
Population	7,647	278,823	1,101,212
Households	3,705	124,602	487,974
Median Household Income	\$ 50,056	\$ 41,176	\$ 45,237
Source : ESRI Community Analyst 2015			
Address	19320 & 19400 US Hwy 19 N		
Jurisdiction	Clearwater		
Ownership	Private		
Approx. Acres	21		



ESRI 5, 15, 30 Minute Drive Times



Pinellas MPO 2014 Average Annual Daily Traffic Counts

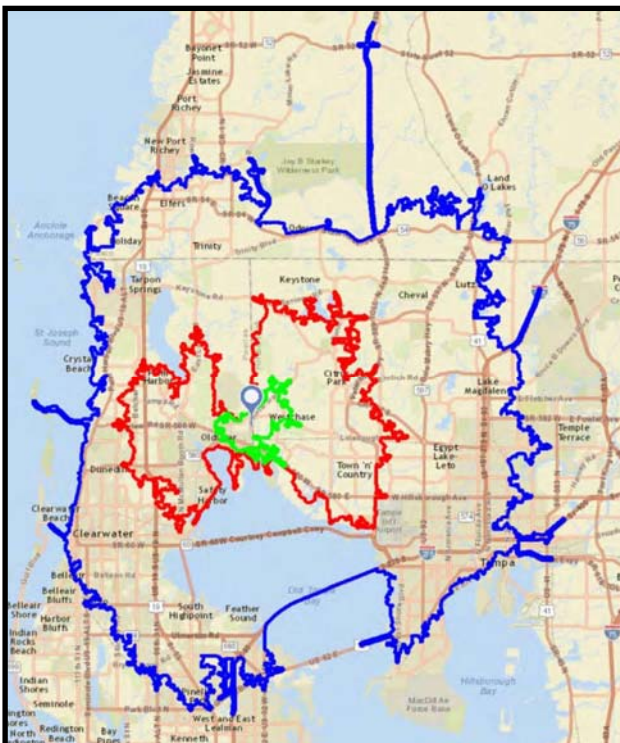
Site 10—Oldsmar Race Track Road

Site Highlights

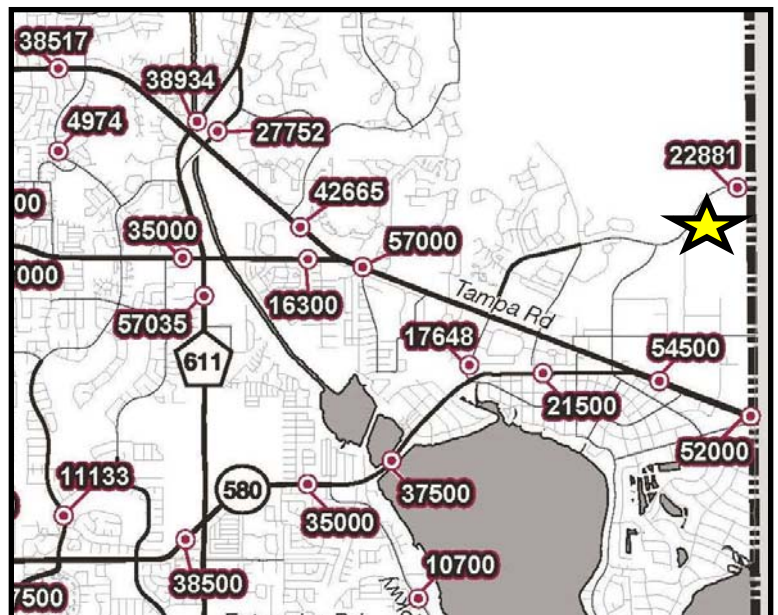
- ✓ High Development Potential
- ✓ Additional Adjacent Acreage under Same Owner
- ✓ Potential Future CSX Connection
- ✓ Adjacent Hillsborough County Line



2015 Demographics	5 Min. Drive	15 Min. Drive	30 Min. Drive
Businesses	1,166	9,485	55,423
Employees	12,731	93,273	633,690
Population	9,209	236,493	1,065,761
Households	3,817	97,571	448,551
Median Household Income	\$ 74,319	\$ 55,862	\$ 46,714
Source : ESRI Community Analyst 2015			
Address	SE corner Forest Lake Blvd. S and Race Track Road		
Jurisdiction	Oldsmar		
Ownership	Private		
Approx. Acres	88		



ESRI 5, 15, 30 Minute Drive Times



Pinellas MPO 2014 Average Annual Daily Traffic Counts