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Economic Effects

JUL X 6 1950

OF THE CHESAPEAKE BAY BRIDGE ON THE EASTERN SHORE

MARYLAND STATE PLANNING COMMISSION
APRIL 1950

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PROBABLE ECONOMIC EFFECTS

of the

CHESAPEAKE BAY BRIDGE

on the

EASTERN SHORE COUNTIES OF MARYLAND

MARYLAND STATE PLANNING COMMISSION

APRIL 1950

MARYLAND STATE PLANNING COMMISSION
100 Equitable Building
Baltimore 2, Maryland

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JOHN B. FUNK
Acting Chairman

I. Alvin Pasarew
Director

April 21, 1950

Mr. John B. Funk, Acting Chairman
Maryland State Planning Commission
100 Equitable Building
Baltimore 2, Maryland

Dear Mr. Funk:

I take pleasure in transmitting herewith a staff study entitled "Probable Economic Effects of the Chesapeake Bay Bridge on the Eastern Shore Counties of Maryland."

It is generally believed that the Chesapeake Bay has long served as a barrier to both social and commercial relations between the Eastern and Western sections of the State. The Bridge will undoubtedly have far reaching effects in eliminating this barrier, and in stimulating the economic prosperity not only of the Eastern Shore but of the State as a whole.

Taking into consideration the economic pattern of the Eastern Shore counties, we find that the most significant results will come from increased traffic on the highways of the Eastern Shore by travelers using the Bridge as a link in the projected system of highways from Maine to Florida; and from the expanded vacation trade made possible by the saving of time which the Bridge will afford.

These are the immediate effects that may be expected. It is probable that the years to come will produce more widespread results in other segments of the Eastern Shore's economy.

Very truly yours,

I. Alvin Pasarew
Director

ACKNOWLEDGMENTS

The State Planning Commission would like to take this opportunity to extend its special appreciation to the following persons and agencies who gave their advice and assistance in the development of this report: Mrs. Gladys N. McDermott, Labor Market Analyst, Department of Employment Security; Miss Sarah P. Carothers, Director of the Tourist Bureau, Baltimore Association of Commerce; Mr. George N. Lewis, Jr., Director of the Traffic Division, State Roads Commission; Mr. Edward A. Rheb, Accountant, Retail Sales Tax Division; Dr. Elwyn A. Mauck, Director, State Fiscal Research Bureau; Mr. Edgar T. Bennett, Vice President and General Manager, Red Star Motor Coaches, Inc., Salisbury, Maryland; Mr. Charles A. Horroworth, Executive Vice-President, American Hotel Association; Mr. E. F. Railsback, Assistant General Manager, Delaware-New Jersey Ferry Company, New Castle, Delaware; and Mr. Russell E. Singer, Executive Vice-President, American Automobile Association. This study was conducted by Mrs. Sybil A. Dinaburg, Research Analyst, under the direction of I. Alvin Pasarew, Director, and Mrs. Shirley F. Weiss, Economist.

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INTRODUCTION

After almost 40 years of intermittent activity for a bridge across the Chesapeake Bay, the State Legislature in 1947, under the leadership of Governor Lane, authorized construction of a Bay crossing. In 1949 work was begun on the Chesapeake Bay Bridge. By the summer of 1952, the Bridge should be a reality.

The Chesapeake Bay, stretching as it does, for 195 miles and varying in width from three to 22 miles, has long separated the Marylanders of the Eastern Shore from those across the water. It has been a major psychological barrier and has been largely responsible for the isolation of the Eastern Shore from the rest of the State.

The Bridge, as noted editorially in The Sun,^{1/} "promises to remake the life of the State in many important respects."

The chief effects of the Bridge will probably be felt in the nine Maryland counties comprising the Eastern Shore. It is in an attempt to describe and, wherever possible, to measure the probable economic effects on these Counties, that this study has been undertaken. The report describes the links across the Bay leading up to and including the Bridge; the general economic background of the counties of the Eastern Shore; and the probable effects of the Bridge on agricultural and industrial activity; as well as those changes expected to result from increased highway traffic and vacation trade.

^{1/} March 23, 1950.

CHAPTER I

LINKS ACROSS THE BAY

EARLY BAY CROSSINGS

From the earliest days of the region's history, freight and passengers have been carried across the Chesapeake Bay by boats of all kinds, plying between the two shores of what is now the State of Maryland. At the time of the first World War, with the growth in automotive traffic, agitation was begun for a regular ferry service to carry trucks, passenger vehicles, and passengers across the Bay. In 1919 such service was established by the Claiborne-Annapolis Ferry, Inc. moving between the two points named. At first, service consisted of only two round trips daily, both summer and winter. As the demands on the service increased, the schedules were expanded and additional ferryboats were added to the line.

In 1930, a new terminal was established at Matapeake, on the Eastern Shore, which thus reduced the water distance from about 23 miles to 8.7 miles. This permitted more frequent service between the two shores. During the Thirties, service between Annapolis and Claiborne was finally discontinued and the number of ferryboats and scheduled trips to Matapeake were greatly expanded.

Under the authority granted by Chapter 856 of the Acts of 1941, the State Roads Commission took over the property and the operation of the Chesapeake Bay Ferry in 1941. In November 1943, the western terminal of the ferry was moved from the narrow streets of Annapolis to its present location on Sandy Point. During the period of State operation, service has been steadily improved by the addition of new and larger ferryboats, the increase in the number of crossings, and the reduction of tolls. ^{1/}

^{1/} Coverdale and Colpitts, Report on Traffic and Revenues, Proposed Chesapeake Bay Bridge, September 15, 1948, pp.5-6

EFFORTS TO BUILD A BRIDGE ACROSS THE BAY

Even before the establishment of the Annapolis-Claiborne Ferry, Inc., a bridge across the Bay was advocated. In 1908, the first proposal for a Chesapeake Bay Bridge was made. The recommendation then called for a bridge across the Bay just north of Baltimore to join the communities on the Eastern Shore with the State's principal city.

Organized private efforts were made when the Merchants and Manufacturers Association, predecessor of the Baltimore Association of Commerce, appropriated \$1,000 in 1908, for an engineering survey.^{2/} Further efforts were made in 1926, when the Chesapeake Bay Bridge Company was organized to construct a bridge across the Bay just north of Baltimore between Miller Island and Tolchester. Federal and State legislation authorizing construction of the bridge was enacted in 1927. However, sufficient funds could not be raised and in 1929 all efforts at construction with private funds were finally abandoned.

Immediately thereafter, serious consideration was given to State construction of a Bay Bridge. However the State, along with the rest of the Nation was in the throes of the depression of the Thirties, and was therefore in no position to consider the financing of such a bridge. It was not until 1937 that the Maryland Legislature, under Chapter 356 of the Acts of 1937, authorized the State Roads Commission to formulate a comprehensive plan for the construction of bridges and tunnels, and to issue revenue bonds payable solely from tolls, to cover the cost of such projects. It was under this authority that the State Roads Commission constructed the Susquehanna River Bridge at Havre de Grace, and the Potomac River Bridge near Morgantown. It is also under this enabling legislation and Chapter 561 of the Acts of 1947 that the Chesapeake Bay Bridge is now being constructed.

^{2/} Baltimore Magazine, November 1948, p.15.

DESCRIPTION OF THE BRIDGE

The Bay Bridge, to cost \$41,000,000, was begun in 1949, and is scheduled for completion in 1952. It will span the Chesapeake Bay from Sandy-Point on the Western Shore to a point near Stevensville, Kent Island, on the Eastern Shore. The approaches to the Bridge will connect with State Highway 404 on both shores. It will stretch for 7.11 miles, with a distance of 4.3 miles over water. The highway will be reinforced concrete, 28 feet wide between curbs, which will afford sufficient width for two lanes of traffic traveling at open highway speeds.^{1/}

^{1/} J. E. Greiner, Co., The Chesapeake Bay Bridge Engineering Report, July 1, 1948, pp.30-33.

FIGURE I

EASTERN SHORE MARYLAND

CHAPTER II

WHAT IS THE EASTERN SHORE

THE GEOGRAPHY OF THE EASTERN SHORE

The Eastern Shore is a major portion of the Delmarva Peninsula, that section of the Middle Atlantic Region lying between the Chesapeake Bay and the Atlantic Ocean and stretching for almost 200 miles from Wilmington, Delaware, to Cape Charles, Virginia. The Peninsula's width varies from 60 miles at its widest to less than one mile at its southern tip. Economically and geographically this section of the coast is a homogeneous area, although politically it is made up of three states. It includes the entire State of Delaware, nine counties of Maryland, and two counties of Virginia. This study is confined to the Eastern Shore which comprises the nine Maryland counties, namely, Cecil, Kent, Queen Anne's, and Caroline, to the North, and Talbot, Dorchester, Wicomico, Somerset, and Worcester, to the South. (See Figure 1.)

The chief cities of the Eastern Shore include Salisbury in Wicomico County, with a 1949 population of 16,000, and second only to Wilmington, Delaware in its size; Cambridge in Dorchester County, with a population of 12,500; Elkton in Cecil County, with 6,000 population; and Easton in Talbot County, with a population of 4,800. These cities are all located on the Eastern Shore's main highway arteries and serve as important trading centers. Ocean City, Maryland, and Rehoboth Beach, Delaware, are popular oceanside resorts, catering to visitors from all parts of the United States.

The land of the Eastern Shore is low, flat, and fertile. The climate is mild, the soil easily worked, and the waters abundantly supplied with a wide variety of seafood. The area is governed by tradition in all manner of things, including methods of farming and fishing, styles of architecture and cooking, as well as social relations.

POPULATION

In 1949 the population of the Eastern Shore was 210,600. The largest counties, in terms of population, were Wicomico with 38,800, and Cecil and Dorchester with 29,600 each. Together these counties comprised almost 40 per cent of the nine-county total. (See Table 1.)

During the 1940's the population of the nine counties increased by almost 8 per cent. All the individual counties witnessed increases. Wicomico County witnessed the greatest relative growth, its population rising by more than 12 per cent during the nine-year period. The other counties experienced varying increases ranging from 12.1 per cent in Cecil to 3.8 per cent in Talbot.

In 1790, this area supported a population of more than 107,000. By 1949, it had grown to more than 210,000. The counties themselves have grown at varying rates. The largest relative growths occurred in Cecil and Wicomico counties which increased by 117 and 115 per cent respectively. Only one county, Queen Anne's, remained approximately unchanged over this period. Although its population increased during the 19th Century, Queen Anne's declined during the early years of the 20th Century and has only begun to regain its former size. Today Queen Anne's County is still slightly below its 1790 size. The increases among the other counties ranged from 13 per cent in Kent to 117 in Cecil County.

Throughout the history of the Nation, the relative importance of the Eastern Shore in the State has declined sharply. In 1790, the population of the nine counties represented one third of the State of Maryland. Today it accounts for only 9.8 per cent of the total. During these 159 years, the population of the State of Maryland increased almost sixfold, while that of the Eastern Shore did not quite double.

TABLE I

POPULATION ON THE EASTERN SHORE, 1790 - 1949

County	Population				% Eastern Shore				% Increase	
	1790	1880	1910	1940	1949	1790	1880	1910	1940	1949
Caroline	9,506	13,766	19,216	17,549	18,900	8.8	7.7	9.6	9.0	9.0
Cecil	13,625	27,108	23,759	26,407	29,600	12.7	15.1	11.9	13.5	14.1
Dorchester	15,875	23,110	28,669	28,006	29,600	14.7	12.9	14.3	14.3	14.1
Kent	12,836	17,605	16,957	13,465	14,500	11.9	9.8	8.5	6.9	6.9
Queen Anne's	15,463	19,257	16,839	14,476	15,400	14.4	10.7	8.4	7.4	7.3
Somerset	15,610	21,668	26,455	20,965	21,800	14.5	12.1	13.2	10.7	10.4
Talbot	13,084	19,065	19,620	18,784	19,500	12.2	10.6	9.8	9.6	9.3
Wicomico 1/	--	18,016	26,815	34,530	38,800	--	10.1	13.4	17.7	18.4
Worcester	11,640	19,539	21,841	21,245	22,500	10.8	10.9	10.9	10.9	10.7
EASTERN SHORE	107,639	179,134	200,171	195,427	210,600	100.0	100.0 ^{2/}	100.0	100.0	100.0 ^{2/}
% OF STATE						33.7	19.2	15.5	10.7	9.8
STATE OF MARYLAND	319,728	934,943	1,295,346	1,821,244	2,143,900					
						570.5				17.7

Source: U.S. Bureau of the Census, 1790 - 1940.
Survey of Buying Power, 1949.

1/ Wicomico County was created in 1867 from portions of Somerset and Worcester counties.

2/ Percentages will not necessarily total 100.0 because of rounding.

3/ Increase from 1880 to 1949.

PER CAPITA INCOME

In terms of net effective buying income, which measures income after tax deductions, the nine counties in 1948 represented about 8 per cent of the State's total. As observed in Table 2, the individual counties fall into two district groups. One is evidently above average in income producing opportunities, the other below average. The most prosperous counties, namely Wicomico, Worcester, Talbot, and Kent, have per capita incomes which rank in the upper half of the counties, and are exceeded only by Montgomery, Baltimore, Baltimore City, Allegany, Washington, and Anne Arundel. The less prosperous, while falling considerably below these, nevertheless exceed the incomes in the State's three lowest counties. The per capita incomes on the Eastern Shore range from \$712 in Somerset to \$1,266 in Wicomico, with an average of \$1,053.

TABLE 2

EFFECTIVE BUYING INCOME ON THE EASTERN SHORE, 1948

<u>County</u>	<u>Net Income</u>	<u>Per Capita</u>	<u>Per Family</u>
Caroline	\$ 18,579,000	\$ 983	\$3,203
Cecil	28,227,000	954	3,360
Dorchester	28,270,000	955	3,249
Kent	17,306,000	1,194	3,762
Queen Anne's	11,961,000	777	2,545
Somerset	15,524,000	712	2,388
Talbot	24,431,000	1,253	4,072
Wicomico	49,118,000	1,266	4,026
Worcester	28,249,000	1,256	4,036
<hr/>			
EASTERN SHORE	\$ 221,665,000	\$1,053	\$3,625
STATE OF MARYLAND	\$2,903,697,000	\$1,354	\$4,869

Source: Survey of Buying Power, May 1949.

ASSESSABLE BASIS

The trend in the value of taxable property is a useful indicator for measuring growth in general community prosperity. The assessable basis for the nine counties in 1948 amounted to \$288,318,222, or 7.5 per cent of the State total. In the ten-year period since 1938 the base of the nine counties rose by 20 per cent from \$240,246,427. (See Table 3.) Its share of the State's total remained unchanged over the period.

The rise in property values varied from county to county. The largest increases in the ten-year period occurred in Wicomico and Worcester counties where the assessable base rose by 51.7 and 47.4 per cent, respectively. Queen Anne's was the only county which showed a decline during the period.

TABLE 3

ASSESSED VALUATION OF PROPERTY ON THE EASTERN SHORE,
1938 AND 1948

<u>County</u>	<u>1938</u>	<u>1948</u>	<u>% Increase</u>
Caroline	\$ 15,735,845	\$ 19,799,247	25.8
Cecil	48,993,106	58,644,118	19.7
Dorchester	29,407,567	32,029,142	8.9
Kent	18,722,400	20,710,210	10.6
Queen Anne's	27,935,234	22,104,922	- 20.9
Somerset	13,924,945	17,706,968	27.2
Talbot	27,473,982	30,241,905	10.1
Wicomico	34,898,572	52,945,155	51.7
Worcester	23,154,776	34,136,555	47.4
<hr/>			
EASTERN SHORE	\$ 240,246,427	\$ 288,318,222	20.0
STATE OF MARYLAND	\$3,170,606,135	\$3,805,394,244	20.0
<hr/>			

Source: State Tax Commission.

EMPLOYMENT AND WAGES

In the second quarter, 1949, more than 35,000 nonagricultural workers, or 6.5 per cent of the State's total, were employed on the Eastern Shore. Wicomico and Dorchester counties, accounted for 15,720, or almost half the total for the area. (See Table 4.)

Wages paid these workers were considerably below the State average. In that period, workers on the Eastern Shore averaged only \$35.37 weekly, as compared with \$50.61 for all nonagricultural workers in the State. Six of the nine counties fell below the area average; only Cecil, Wicomico, and Queen Anne's exceeded it. Average weekly wages per employee ranged from \$26.25 in Somerset County to \$42.44 in Cecil County.

TABLE 4

NONAGRICULTURAL EMPLOYMENT AND WAGES ON THE EASTERN SHORE,
SECOND QUARTER 1949

<u>County</u>	<u>Average Monthly Employment</u>	<u>Average Weekly Wages per Employee</u>
Caroline	3,350	\$33.68
Cecil	3,600	42.44
Dorchester	5,702	31.58
Kent	1,799	30.67
Queen Anne's	1,065	35.60
Somerset	2,496	26.25
Talbot	3,403	35.03
Wicomico	10,018	40.13
Worcester	3,812	31.73
<hr/>		
EASTERN SHORE	35,245	\$35.37
STATE OF MARYLAND	538,521	\$50.61
<hr/>		

Source: Department of Employment Security.

CHAPTER III

MAJOR INDUSTRIES

AGRICULTURE

Agriculture is the main economic activity in this area. According to the Census Bureau, it accounts for more than two thirds of the land area and approximately one third of all gainfully employed workers. While manufacturing and trade have increased significantly within the past two decades, they have not overtaken agriculture in numbers of persons employed.

In 1940 total gross farm income on the Eastern Shore was more than \$21,000,000, or one third of the State total. By 1945, it had tripled to more than \$63,000,000 chiefly because of the tremendous expansion in poultry raising and the general rise in prices. (See Table 5.) In 1945, it accounted for

TABLE 5

GROSS FARM INCOME ON THE EASTERN SHORE, 1940 AND 1945

<u>Counties</u>	1940		1945	
	<u>Total</u>	<u>Rank</u>	<u>Total</u>	<u>Rank</u>
Caroline	\$ 2,352,396	5	\$ 6,718,956	3
Cecil	2,471,174	3	4,628,328	7
Dorchester	2,223,343	6	4,667,635	6
Kent	1,986,251	8	3,861,819	9
Queen Anne's	2,364,537	4	5,563,536	5
Somerset	1,696,795	9	5,964,943	4
Talbot	2,064,300	7	4,627,855	8
Wicomico	2,754,367	2	12,640,607	2
Worcester	3,331,550	1	14,598,965	1
<hr/>				
EASTERN SHORE	\$21,252,213		\$ 63,272,644	
% OF STATE	33.2		41.5	
STATE OF MARYLAND	\$64,083,970		\$ 152,373,814	

Source: Census of Agriculture.

more than 41 per cent of the total agricultural crop in the State. In both 1940 and 1945, Worcester and Wicomico counties ranked first and second,

VALUE OF MAJOR AGRICULTURAL PRODUCTS RAISED ON THE EASTERN SHORE, 1945 ^{1/}

	TOTAL		Caroline		Cecil		Dorchester		Kent	
	\$	%	\$	%	\$	%	\$	%	\$	%
Vegetables	9,237,200	14.6	1,174,100	17.5	318,177	6.9	1,810,764	38.8	363,554	9.4
All Other Crops	7,532,405	11.9	612,330	9.1	582,737	12.6	874,060	18.7	904,577	23.4
Dairy Products	8,821,438	13.9	950,018	14.1	2,113,701	45.7	572,801	12.3	1,640,437	42.5
Poultry and Poultry Products	29,470,578	46.6	3,234,980	48.1	519,997	11.2	677,638	14.5	291,034	7.5
Livestock and Livestock Products	2,812,978	4.4	269,795	4.0	547,699	11.8	214,834	4.6	366,366	9.5
All Other Products	5,398,045	8.5	477,733	7.1	546,017	11.8	517,538	11.1	295,851	7.7
TOTAL	63,272,644	100.0	6,718,956	100.0	4,628,328	100.0	4,667,635	100.0	3,861,919	100.0

	Queen Anne's		Somerset		Talbot		Wicomico		Worcester	
	\$	%	\$	%	\$	%	\$	%	\$	%
Vegetables	410,977	7.4	1,299,601	21.8	684,635	14.8	2,128,942	16.8	1,046,450	7.2
All Other Crops	1,363,095	24.5	255,192	4.3	1,013,516	21.9	1,196,204	9.5	730,694	5.0
Dairy Products	2,013,453	36.2	176,833	3.0	943,944	20.5	134,312	1.1	270,939	1.9
Poultry and Poultry Products	757,014	13.8	3,539,306	59.3	1,036,788	22.4	8,196,221	64.8	11,207,600	76.8
Livestock and Livestock Products	498,930	9.0	136,004	2.3	427,745	9.2	136,607	1.1	214,998	1.5
All Other Products	510,067	9.2	558,007	9.4	516,227	11.2	848,321	6.7	1,128,284	7.7
TOTAL	5,563,536	100.0	5,964,943	100.0	4,627,855	100.0	12,640,607	100.0	14,598,965	100.0

Source: Census of Agriculture.

^{1/} Percentages will not necessarily total 100.0 because of rounding.

respectively, in the value of gross farm income on the Eastern Shore. Owing chiefly to the increase in poultry raising, Somerset County shifted from ninth to fourth place among the counties between 1940 and 1945.

In addition to the raising of poultry, which is the chief agricultural crop of the Eastern Shore, farms in the nine counties produce vegetables, livestock, dairy, and miscellaneous agricultural products. These together accounted for the \$63,000,000 agricultural crop in 1945. As may be observed from Table 6, almost half of the total value of farm products was attributable to poultry raising, and 15 per cent to vegetables. The counties chiefly responsible for the \$29,400,000 poultry crop in 1945 were Worcester, Wicomico, Somerset, and Caroline in the order named. In these counties poultry products ranged in importance from one half of total agricultural value in Caroline County to three quarters in Somerset. The continued expansion of the poultry industry in the postwar period has further increased its relative importance in the total agricultural production of the area.

SEAFOOD

In 1945, more than 5,200 Eastern Shoremen were engaged in taking seafood products from the Bay and the surrounding waters. They comprised almost two thirds of all commercial fishermen in the State.

In terms of dollar value, the most important seafood products caught in Maryland waters are oysters, blue crabs, and miscellaneous fish products, including striped bass, sea trout, and croaker. The majority of the State's \$9,000,000 seafood crop in 1945 was caught by fishermen on the Eastern Shore.

MANUFACTURING

Second in economic importance to agriculture on the Eastern Shore is manufacturing. In the past ten years, the nine counties, predominantly rural, have shown a marked increase in manufacturing activity. According to the 1947

Census of Manufactures, 444 establishments were engaged in manufacturing miscellaneous products in the area, in contrast with only 370 in 1939. In 1947 these establishments employed 15,400 production workers, or 34 per cent in excess of the number employed in 1939. The Eastern Shore's increase in manufacturing employment during the eight-year period exceeded those of the Baltimore Metropolitan area and of the State, which were 31 and 30 per cent, respectively.

In that same period the Shore's relative share of total value added by manufacture in the State increased from 3.8 per cent to 4.6 per cent. Whereas value added by manufacture in the nine counties in 1939 was \$16,000,000, it rose to \$53,000,000 in 1947.

According to reports made to the Department of Employment Security under the Unemployment Compensation Laws of Maryland, 495 establishments on the Eastern Shore had an average monthly employment of 15,000 in the second quarter of 1949.

The canning and processing of most of the Shore's seafood and agricultural products is the leading manufacturing industry. It employs almost 50 per cent of all workers in manufacturing. The production of all types of apparel accounts for another 20 per cent.

Wicomico and Dorchester are the leading counties in terms of the number employed in manufacturing. Together they account for more than half the Shore's manufacturing employees. Table 7 presents the employment distribution in the manufacturing industries on the Eastern Shore.

Total employment in manufacturing in the nine counties in relation to the area population, is revealing. Wicomico, the chief manufacturing county, employs more than 12 per cent of its total population in manufacturing and Dorchester County, more than 10 per cent. For purposes of comparison, it is interesting to note that less than 12 per cent of Baltimore City's population were engaged in manufacturing during the same period.

TABLE 7

EMPLOYMENT DISTRIBUTION IN THE MANUFACTURING INDUSTRIES
ON THE EASTERN SHORE, SECOND QUARTER 1949 ^{1/}

A. Total For Nine Counties

	Number Of Establishments	Average Monthly Employment Number	% Total	Quarterly Wages
Food and Kindred Products	164	6,660	42.1	\$2,754,931
Textile Mill Products	9	352	2.2	286,228
Apparel and Related Products	41	3,100	19.6	1,101,002
Lumber and Products, except Furniture	125	2,041	12.9	805,960
Furniture and Fixtures	3	a/	a/	a/
Paper and Allied Products	2	a/	a/	a/
Printing and Publishing Industries	34	316	2.0	182,770
Chemicals and Allied Products	19	413	2.6	225,563
Petroleum and Coal Products	1	a/	a/	a/
Rubber Products	2	a/	a/	a/
Stone, Clay, and Glass Products	24	264	1.7	123,415
Primary Metal Products	3	a/	a/	a/
Fabricated Metal Products	7	396	2.5	248,021
Machinery (except Electrical)	3	a/	a/	a/
Transportation Equipment	33	328	2.1	200,583
Instruments and Related Products	1	a/	a/	a/
Miscellaneous Manufactures	24	1,936	12.3	1,033,847
TOTAL	495	15,806	100.0	\$6,962,320

B. Caroline County

Food and Kindred Products	30	1,045	55.9	\$ 370,173
Apparel and Related Products	3	a/	a/	a/
Lumber and Products, Except Furniture	4	23	1.5	7,386
Printing and Publishing Industries	6	52	2.8	28,069
Chemicals and Allied Products	1	a/	a/	a/
Stone, Clay, and Glass Products	1	a/	a/	a/
Transportation Equipment	2	a/	a/	a/
Miscellaneous Manufactures	6	743	39.9	247,208
TOTAL	53	1,868	100.0	\$ 652,836

C. Cecil County

Food and Kindred Products	8	26	1.8	\$ 9,011
Textile Mill Products	2	a/	a/	a/
Apparel and Related Products	3	a/	a/	a/
Lumber and Products, Except Furniture	8	54	3.6	22,242
Furniture and Fixtures	1	a/	a/	a/
Paper and Allied Products	2	a/	a/	a/
Printing and Publishing Industries	4	26	1.8	14,162
Chemicals and Allied Products	5	182	11.8	108,336
Rubber Products	2	a/	a/	a/

C. Cecil County (Contd.)

<u>Industry</u>	<u>Number Of Establishments</u>	<u>Average Monthly Employment</u>		<u>Quarterly Wages</u>
		<u>Number</u>	<u>% Total</u>	
Stone, Clay, and Glass Products	3	a/	a/	a/
Primary Metals Industries	2	a/	a/	a/
Fabricated Metal Products	1	a/	a/	a/
Machinery (except Electrical)	1	a/	a/	a/
Transportation Equipment	8	117	7.5	82,163
Miscellaneous Manufactures	7	1,149	74.1	765,611
TOTAL	57	1,554	100.0	\$1,001,525

D. Dorchester County

Food and Kindred Products	25	1,468	50.0	\$ 625,997
Apparel and Related Products	8	543	28.5	302,830
Lumber and Products, except Furniture	17	235	8.1	101,061
Printing and Publishing Industries	5	32	1.1	19,023
Chemicals and Allied Products	2	a/	a/	a/
Stone, Clay, and Glass Products	2	a/	a/	a/
Fabricated Metal Products	2	a/	a/	a/
Transportation Equipment	6	40	1.4	20,593
Miscellaneous Manufactures	--	342	11.5	197,800
TOTAL	67	2,961	100.0	\$1,267,309

E. Kent and Queen Anne's Counties

Food and Kindred Products	17	459	49.8	\$ 157,088
Textile Mill Products	1	a/	a/	a/
Apparel and Related Products	1	a/	a/	a/
Lumber and Products, except Furniture	1	a/	a/	a/
Printing and Publishing Industries	2	a/	a/	a/
Chemicals and Allied Products	4	39	4.2	20,852
Stone, Clay, and Glass Products	3	a/	a/	a/
Transportation Equipment	2	a/	a/	a/
Miscellaneous Manufactures	1	426	46.1	178,436
TOTAL	32	924	100.0	\$ 356,376

F. Somerset County

Food and Kindred Products	17	443	40.8	\$ 165,648
Apparel and Related Products	4	315	29.0	86,563
Lumber and Products, Except Furniture	16	156	14.4	41,424
Furniture and Fixtures	1	a/	a/	a/
Printing and Publishing Industries	3	a/	a/	a/
Chemicals and Allied Products	1	a/	a/	a/
Stone, Clay, and Glass Products	1	a/	a/	a/
Fabricated Metal Products	1	a/	a/	a/
Miscellaneous Manufactures	2	173	16.0	103,018
TOTAL	46	1,087	100.0	\$ 396,653

G. Talbot County

<u>Industry</u>	<u>Number Of Establishments</u>	<u>Average Monthly Employment</u>		<u>Quarterly Wages</u>
		<u>Number</u>	<u>% Total</u>	
Food and Kindred Products	20	810	70.6	\$ 335,021
Textile Mill Products	3	a/	a/	a/
Apparel and Related Products	2	a/	a/	a/
Lumber and Products, except Furniture	5	35	3.0	9,459
Furniture and Fixtures	1	a/	a/	a/
Printing and Publishing Industries	2	a/	a/	a/
Stone, Clay, and Glass Products	4	30	2.6	10,566
Primary Metal Industries	1	a/	a/	a/
Fabricated Metal Products	2	a/	a/	a/
Transportation Equipment	7	85	7.4	56,983
Miscellaneous Manufactures	--	188	16.4	83,272
TOTAL	47	1,148	100.0	\$ 495,301

H. Wicomico County

Food and Kindred Products	27	1,634	34.8	\$ 796,136
Textile Mill Products	1	a/	a/	a/
Apparel and Related Products	16	1,311	27.9	495,965
Lumber and Products, except Furniture	43	1,017	21.7	432,700
Printing and Publishing Industries	9	112	2.4	70,369
Chemicals and Allied Products	4	80	1.7	42,314
Stone, Clay, and Glass Products	6	81	1.7	48,873
Fabricated Metal Products	1	a/	a/	a/
Machinery (except Electrical)	2	a/	a/	a/
Transportation Equipment	4	35	0.7	13,005
Instruments and Related Products	1	a/	a/	a/
Miscellaneous Manufactures	4	425	9.1	292,839
TOTAL	118	4,695	100.0	\$2,192,201

I. Worcester County

Food and Kindred Products	25	775	49.4	\$ 295,857
Textile Mill Products	2	a/	a/	a/
Apparel and Related Products	4	155	9.9	46,508
Lumber and Products, except Furniture	31	503	32.1	187,195
Printing and Publishing Industries	3	a/	a/	a/
Chemicals and Allied Products	2	a/	a/	a/
Petroleum and Coal Products	1	a/	a/	a/
Stone, Clay, and Glass Products	4	14	0.9	6,874
Transportation Equipment	2	a/	a/	a/
Miscellaneous Manufactures	1	122	7.8	63,685
TOTAL	75	1,569	100.0	\$ 600,119

Source: Department of Employment Security.

1/ Percentages will not necessarily total 100.0 because of rounding.

a/ Withheld to avoid disclosing figures for individual firms; data included with Miscellaneous Manufactures.

RETAIL TRADE

In 1948 retail sales on the Eastern Shore totaled \$158,592,000, or 8.5 per cent of the total for the State. (See Table 8.) More than a quarter of all sales was in food products which represented 8.5 per cent of all food products sold in retail stores in the State. The sales of general merchandise and furniture - household - radio products, which together accounted for 8.2 per cent of all Eastern Shore sales, represented only 4.1 per cent and 1.2 per cent, respectively, of all State sales made in each of these groups.

According to Table 8, Wicomico County is the most important trading center on the Eastern Shore. Almost a quarter of total retail sales was made in retail outlets in the County. Another 26 per cent was made in the outlets in Worcester and Dorchester counties combined. The dollar value of sales ranged from \$8,541,000 in Queen Anne's County to \$36,997,000 in Wicomico.

The 1,353 retail establishments operating on the Eastern Shore in the second quarter 1949, employed 6,500 workers or 6.2 per cent of all employees in retail outlets in the State. (See Table 9.) As in the case of the volume of sales, Wicomico led all counties in the number of workers employed. The four largest counties, in terms of employment in retail trade, Wicomico, Worcester, Dorchester, and Cecil in the order named, accounted for almost two thirds of the Eastern Shore total. Employment in retail trade ranged from 222 in Queen Anne's County to 1,550 in Wicomico County.

TABLE 8

VALUE OF RETAIL SALES ON THE EASTERN SHORE, 1948

County	Total	% Total ^{1/}	Food	General Merchandise	Drug	Furniture-Household-Radio	All Other Merchandise
Caroline	\$ 11,855,000	7.5	\$ 3,506,000	\$ 537,000	\$ 339,000	\$ 38,000	\$ 7,435,000
Cecil	17,894,000	11.3	6,059,000	413,000	270,000	71,000	11,031,000
Dorchester	19,762,000	12.5	6,302,000	1,596,000	469,000	207,000	11,138,000
Kent	12,352,000	7.8	3,507,000	2/	339,000	71,000	8,435,000
Queen Anne's	8,541,000	5.4	2,375,000	358,000	164,000	44,000	5,600,000
Somerset	8,990,000	5.7	3,835,000	578,000	317,000	55,000	4,205,000
Talbot	19,850,000	12.5	4,828,000	1,430,000	1,043,000	54,000	12,495,000
Wicomico	36,997,000	23.3	7,141,000	4,898,000	996,000	407,000	23,555,000
Worcester	22,351,000	14.1	4,344,000	2,119,000	422,000	58,000	15,408,000
EASTERN SHORE	\$ 158,592,000	100.0	\$ 41,897,000	\$ 11,929,000	\$ 4,359,000	\$ 1,005,000	\$ 99,402,000
% OF STATE	8.5	8.5	4.1	8.3	1.2	10.4	
STATE OF MARYLAND	\$1,876,479,000		\$ 494,739,000	\$290,763,000	\$52,663,000	\$85,019,000	\$ 953,295,000

Source: Survey Of Buying Power, May 1949.^{1/} Percentages will not necessarily total 100.0 because of rounding.^{2/} Withheld to avoid disclosure.

TABLE 9
EMPLOYMENT DISTRIBUTION IN RETAIL TRADE ON
THE EASTERN SHORE, SECOND QUARTER 1949

<u>County</u>	<u>Number Of Establishments</u>	<u>Average Monthly Employment</u>		<u>Quarterly Wages</u>
		<u>Number</u>	<u>% Total^{1/}</u>	
Caroline	105	456	7.0	\$ 200,059
Cecil	178	796	12.2	324,460
Dorchester	162	905	13.9	411,807
Kent	83	424	6.5	160,894
Queen Anne's	67	222	3.4	82,292
Somerset	103	355	5.5	136,182
Talbot	161	772	11.9	337,125
Wicomico	273	1,550	23.8	849,630
Worcester	221	1,024	15.7	386,073
<hr/>				
EASTERN SHORE	1,353	6,504	100.0	\$ 2,888,522
% OF STATE	10.4	6.2		5.4
STATE OF MARYLAND	12,983	105,184		\$53,625,349

Source: Department of Employment Security.

^{1/} Percentages will not necessarily total 100.0 because of rounding.

CHAPTER IV

PROBABLE EFFECTS OF THE BAY BRIDGE ON THE MAJOR INDUSTRIES

AGRICULTURE

From a special study conducted by the State Planning Commission in 1949, it was found that the agriculture of the Eastern Shore would not be materially affected by the Chesapeake Bay Bridge. ^{1/}The study revealed that:

- (1) The Bridge will have little effect on the marketing of wheat grown on the Eastern Shore.
- (2) Eastern Shore dairymen are well satisfied with their present markets, and the Bridge will not induce any larger shipments of milk to Baltimore.
- (3) Shipments of livestock to Baltimore from the Eastern Shore can be expected to . . . increase as truckers learn of the facilities and higher prices offered by the Union Stock Yards in Baltimore.
- (4) The majority of Eastern Shore fruits and vegetables will continue to be sold in the northern cities because of the higher prices offered to the farmers. No important increases in produce shipments to the Baltimore market can be expected.
- (5) While the Bridge may facilitate the marketing of poultry in the Baltimore and Washington markets, there will probably be no large increase in poultry shipments to the Western Shore.

In addition, it should be noted that Eastern Shore agricultural production may be favorably affected by such population increases as result from the growth of manufacturing and trade in these counties. The expanded tourist and vacation trade will also provide an expanded market for local agricultural produce.

^{1/} Maryland State Planning Commission, Possible Economic Effects of Chesapeake Bay Bridge on Eastern Shore Agriculture, Special Report by William D. Clayton, 1949.

SEAFOOD

As in the case of agriculture, seafood will probably not witness any extensive changes with the opening of the Bridge. What effects will be felt will probably be the indirect result of any increases in population brought about by the growth of manufacturing and trade in the Eastern Shore counties, and the expanded tourist and vacation traffic. Such increases in demand for seafood products will be most apt to affect price, and only secondarily, total amount of the catch marketed.

MANUFACTURING

Manufacturing, as is shown in Chapter III, has witnessed material growth in recent years. The greater accessibility afforded by the Bridge, should effect a further growth by facilitating the shipment to and from Baltimore of both raw materials and finished products. However, this will probably be a slow process, taking many years to develop.

The cities of the Shore can now offer available labor supplies of all skills at lower wage rates than those paid in Baltimore. This factor plus greater accessibility should not only facilitate the expansion of existing manufacturing establishments, but should also encourage the location of new facilities on the Shore. Where manufacturers in the past have either failed to consider, or have actually rejected these locations, they can now be expected to consider them more seriously in the selection of new sites.

The existence of a pool of available labor can be judged only on the basis of the present supply. The local State Employment offices on the Shore reported some 2,000 workers of various skills as unemployed and currently registered for jobs as of the middle of November 1949. Of this number about 70 per cent were either semiskilled or unskilled who would be

readily usable in most general types of factory employment. The available labor supply also included 250 skilled workers. Almost one third of the total labor supply were registered with the Cambridge office which serves Dorchester and Caroline counties. While no actual breakdown of these workers was available by place of residence, it is reasonable to expect that most of them live in Cambridge proper. Salisbury and Elkton also have many workers available for employment.

In addition to the workers actually registered, there are others who could be drawn upon with the expansion of manufacturing activity in the area. They include workers unemployed but not currently registered with the local employment offices, as well as those not yet in the labor market. Experience has shown that with the location of attractive employment opportunities in a community, some workers, particularly women, have been drawn into the labor market.

Manufacturers seeking to locate on the Shore will not only find a supply of labor available but will also find currently in Cambridge three small vacant plants varying in size from 1,000 to 7,800 square feet. Cambridge, as well as other Shore cities, also has available many undeveloped areas where new plant facilities could be located.

RETAIL TRADE

The effects of the Bridge on retail trade will probably be felt in many ways. Any increases in income resulting from the expansion of agricultural or industrial production will affect retail trade in the Eastern Shore counties. It has been stated that trade and service establishments, alive to their potentialities, may create considerable employment in addition to the original agricultural or industrial expansion. The

Gary Industrial Foundation, Inc. has estimated that manufacturing payroll money usually creates business in the city in a volume of $2\frac{1}{2}$ to $3\frac{1}{4}$ times the payrolls themselves. Another study reveals that an increase of ten jobs in a basic economic activity will automatically cause an increase of eight jobs in service lines.

Retail trade on the Eastern Shore will also be affected by the increases in North-South highway traffic which the Bridge will make possible. However, the most promising source of increase in retail trade will be the expansion of the vacation trade and the income it will bring to the counties of the Eastern Shore. This is discussed in greater detail in Chapter VII.

CHAPTER V

VACATION CENTER

The Eastern Shore is best known to most Marylanders for its vacation areas. Its position on the Ocean as well as the Bay provides it with vacation centers of wide variety. The Ocean, with its surf bathing and deep sea fishing attracts the largest number of vacationers. The Bay, with its long and much indented shoreline, large areas of shallow water, numerous tributary rivers, and small streams provides many fishing, yachting, and swimming centers. The rural areas and scenic land of the central peninsula offer opportunities to city dwellers for a real vacation on the farm.

There are a great number of places to which vacationers interested in the many activities of the Shore can go. However, in this report discussion is confined to the more highly developed centers, which may be expected to profit in the immediate future from the increased traffic across the new bridge.

DESCRIPTION OF VACATION AREAS

Traveling south from the head of the Peninsula, the vacationer first reaches Elk Neck State Park in Cecil County, a 1000-acre tract fronting on both the Chesapeake Bay and the Elk River. These waters furnish ample facilities for fishing and swimming. The Park, operated by the Department of State Forests and Parks, maintains vacation cabins which are available on advance reservations with the Department of State Forests and Parks in Annapolis.

In Kent County, the nearest Eastern Shore county to Baltimore, there are three developed resort locations, namely Betterton, Chestertown, and Tolchester Beach. Connected with Baltimore by large excursion boats,

Betterton, on the Sassafras River, offers picnicking, swimming, boating, fishing, and other amusements for day visitors. Lodging is available at hotels, cottages, and private homes in Betterton as well as in near-by Chestertown.

Located on the Chester River, Chestertown is an important vacation center frequented by many visitors. In addition to the fishing, boating, and swimming on the River, Chestertown has been described as "a gracious old place . . . the very essence of the Eastern Shore with its mellow combination of sights, feelings, tastes and smells that recall centuries of pleasant living." ^{1/} Late in July the Chester River Yacht and Country Club is host to scores of sailing and power boats participating in the Chester River Regatta. A special point of interest in Chestertown is historic Washington College founded in 1782.

Some 12 miles to the west of Chestertown on the Bay, is Tolchester Beach, a famous Maryland resort. Here facilities are provided for picnicking, swimming, fishing, boating, and other daytime amusements. The local hotel, as well as private homes and restaurants, offer lodging and meals for the visitors to the area.

To the south in Talbot County, the tidewater area in the vicinity of St. Michaels, Claiborne, Tilghman, and Oxford affords many opportunities for swimming, boating, and fishing in the abundant waters of the Bay. Visitors to the area can find accommodations at Royal Oak, Claiborne, Oxford, and Tilghman. Near-by Easton offers luxury accommodations at a new air conditioned hotel opened in 1949.

Cambridge, in Dorchester County, on the two mile wide Choptank River is a resort town, a bustling harbor, and a thriving industrial center.

^{1/} U. S. Works Progress Administration, Maryland, A Guide To The Old Line State, 1940, p. 366.

The River affords excellent yachting, fishing, and swimming facilities, and the City holds much of interest for the visitor. The two hotels, with their combined total of 81 rooms, as well as numerous guest houses, private homes, and restaurants serve the visitors to this thriving community.

Continuing down the Bay to Somerset County, the traveler reaches Crisfield, the seafood center of the Eastern Shore. Lodged on a cove off Tangier Bay, it is given over entirely to harvesting, packing and shipping of vast cargoes of oysters, crab, and fish from all parts of the lower Chesapeake. Visitors to this section of the Eastern Shore can be accommodated at the two hotels and private homes in the area.

Ocean City is Maryland's large seashore resort, located directly on the Atlantic. It is noted for its ocean swimming, boating, and deep sea fishing. Though fish of all kinds are caught in the ocean waters and Sinepuxent Bay to the west, it is big game fishing, chiefly of white marlin, which has brought Ocean City its fame. Like other important Atlantic resorts it has a boardwalk extending along the beach front.

SANDY POINT STATE PARK

In considering the expected increase in vacation travel to the Eastern Shore, it is appropriate that mention be made of the new 670-acre State Bayside Park being constructed at Sandy Point, the western terminus of the Bridge. Day tourists from the Baltimore Metropolitan Area, the Washington Metropolitan Area, and other parts of the Western Shore will probably patronize the Park in great numbers. It will offer such facilities as swimming in the Bay as well as pools, picnicking, and boating on artificial lakes. Ample parking areas will be provided as well as bathhouses and playground areas for children and adults. Since facilities will be available only for daytime activities, Sandy Point State Park will probably not

absorb a significant portion of the increased vacation trade expected on the Eastern Shore.

EMPLOYMENT AND INCOME

The hotels, tourist houses and other lodging places, and the restaurants in the nine Eastern Shore counties provide employment for almost 2,000 workers. More than a third of these work in Worcester County's many seashore hotels and restaurants. Employment increases sharply during the peak summer months and falls off after Labor Day. On the basis of Retail Sales and Use Tax Collections, reported for the fiscal year 1949, it may be estimated conservatively that the total income of all lodging places and restaurants was almost \$18,000,000. Worcester County accounted for almost \$5,000,000 of this total with Wicomico and Cecil counties following close behind.

When these figures are compared with income from agriculture, manufacturing, or trade, the vacation business does not appear to be of major significance. It must be remembered, however, that vacationers make many other expenditures, not reflected in these figures. Undoubtedly the industry's importance lies in its potentialities for future growth, rather than in its present status.

CHAPTER VI

THE BAY BRIDGE AS A MAJOR LINK IN NORTH-SOUTH TRAFFIC

With passenger cars in the majority of families in the Nation, Americans have become the greatest travelers the world has ever seen. Truck and passenger cars move over the highways in all directions in ever increasing volume. The most heavily traveled route in the United States is that linking New England and New York with Washington and points South.

PRESENT HIGHWAY ROUTES

After crossing the Hudson River, traffic moving south from New York to Washington most frequently follows U.S. 1 to New Brunswick, U.S. 130 to the Pennsville-New Castle Ferry, where it crosses the Delaware River and follows U.S. 40 across the Susquehanna River Bridge at Havre de Grace to Baltimore. From there, U.S. 1 is picked up to Washington, Richmond, and the South. (See Figure 2.)

While this is the most popular route a considerable amount of traffic out of New York follows U. S. 1 through Trenton, Philadelphia, and Baltimore to Washington, Richmond, and points South. Since the opening of the Potomac River Bridge near Morgantown in 1940, southbound traffic has increasingly followed U.S. 301 out of Baltimore across the Bridge directly to Richmond. This route has permitted traffic to by-pass Washington, D. C., completely and has accomplished a time saving of some 30 minutes.

A good portion of the traffic heading far south crosses the Delaware River via the Pennsville-New Castle Ferry and follows U.S. 13 down through the Delmarva Peninsula to the Cape Charles Ferry. Crossing on to the Virginia mainland, traffic picks up U.S. 17, which it follows all the way to Florida.

FIGURE 2

PRESENT AND PROJECTED HIGHWAY ROUTES BETWEEN NEW YORK CITY AND RICHMOND, VIRGINIA

PROJECTED HIGHWAY ROUTES

In 1949 work was begun on three major links in the interregional system of highways to run from Portland, Maine, to Richmond, Virginia, and the South. These included the Chesapeake Bay Bridge between Sandy Point and Stevensville; the Delaware Memorial Bridge to replace the ferry at Pennsville; and the New Jersey Turnpike, the express toll highway running from the Delaware Memorial Bridge northeast to the George Washington Bridge and New York City. Completion of the toll expressway is currently expected in 1951. The two bridges should be opened to traffic by the summer of 1952.

After 1952 through traffic intent on by-passing the major cities will be able to traverse the New Jersey Turnpike or the old routes through New Jersey to the Delaware Memorial Bridge. After crossing the Delaware River motorists will follow U.S. 40 to Elkton and U.S. 213 from there to the juncture of U.S. 50, which leads to the Chesapeake Bay Bridge. From Sandy Point on the west shore of the Bay, traffic will move along the Revell Highway, across the new Severn River Bridge, over the new Annapolis to Washington highway paralleling U.S. 50, which will connect with U.S. 301 crossing the Potomac River Bridge at Morgantown to Richmond and points South. In the years immediately following the completion of the Bay Bridge, but before the completion of the Annapolis to Washington expressway, traffic destined for the Nation's Capital will follow Maryland Route 404 from the western terminus of the Bridge, across the new Severn River Bridge to U.S. 50, and west to the District of Columbia. (See Figure 2.)

The new route across the Bay will also serve as an alternate for motorists now using coastal route U.S. 13 through the Delmarva Peninsula and crossing the Cape Charles Ferry to U.S. 17 on the mainland. (See Figure 2). Anticipating the competition from this new express route, promoters of the

U.S. 13 route are, among other reasons, attempting to increase its attractiveness by shortening the distance and travel time across the Bay at the southern tip of the Delmarva Peninsula. The ferry at Cape Charles is being moved to Kiptopeke, some 9 miles to the southeast. The distance across the Bay will thus be reduced $4\frac{1}{4}$ nautical, or $5\frac{1}{4}$ land miles, and travel time, 30 minutes.

For Maryland's share of the interregional express highway, the State Roads Commission has begun work on a number of highways and has others in the planning state. In January 1950 work was begun on the Annapolis to Washington divided expressway. Contracts were let on the new bridge across the Severn River to carry traffic from the Revell Highway and the Bay Bridge to Parole on the expressway. Contracts were also let on a 8.7-mile stretch of road west across the South River to the Prince George's County line and the juncture with U.S. 301, as well as on the new bridge to cross the South River. Completion of this entire stretch from Annapolis to the juncture with U.S. 301 is expected by the time of the opening of the Bay Bridge. However, work on the stretch of the expressway west to the Nation's Capital, while projected, has not been undertaken and will probably not be completed until 1955 or thereafter.

On the Eastern Shore an expressway from the eastern terminus through Queen Anne's County to Warwick in Kent County on the Delaware State line is projected. Work has started on the 9-mile stretch from Stevensville on Kent Island to Queenstown. Completion of this stretch is expected in time for the opening of the Bay Bridge. The extension of this expressway through Queen Anne's and Kent counties to Warwick on the Delaware State line has been projected although not yet begun. Completion of this stretch is not expected until 1955 or thereafter.

To carry traffic further north, a stretch of the interregional highway will run from Warwick through the State of Delaware, to connect

with U.S. Route 13 to the Delaware Memorial Bridge just south of Wilmington. While this stretch is also projected, actual construction is not yet underway. Completion dates are therefore indefinite at this time.

Upon construction of the entire network of highways, of which the Bay Bridge will be an important link, motorists will have a through route over which they may move at high speeds, by-passing every major city en route.

ESTIMATES OF EXPECTED TRAFFIC

Detailed estimates of expected Bay Bridge traffic have been made.^{1/} However, these have been based chiefly on recent growth in ferry traffic plus an allowance for increased traffic induced by the Bridge, assuming the present toll structure. No particular consideration is given to the increase in traffic by virtue of the Bridge's position as a link in the network of interregional express highways. For the first year of bridge operation, a total traffic of approximately 1,200,000 vehicles is forecast, increasing approximately 5 per cent annually.

These estimates, having been prepared for financial purposes, are advisedly conservative. In point of fact, ferry traffic, by the year ending September 30, 1949 had grown to 702,000, an increase of 20 per cent over the previous year, in contrast to the 8 per cent projected in the estimates.

Some further account must also be taken of the increased use to be made of the Bridge by motorists desiring to by-pass the major urban centers. Figures on the number of motorists using near-by existing links in the long-distance highway network give some indication of a minimum number who may be expected to follow the new route.

^{1/} Coverdale and Colpitts, Report on Traffic and Revenues, Proposed Chesapeake Bay Bridge, September 15, 1948, pp. 17-18.

In the year ending September 1949 more than 2,500,000 vehicles used the New Castle-Pennsville Ferry over the Delaware River. It is estimated that half as many additional vehicles crossed the Delaware River via the Chester Ferry. 1/ In the same period almost 5,000,000 vehicles used the Susquehanna River Bridge at Havre de Grace. Although almost half of these were Maryland cars, the other half were probably long-distance travelers. Vehicles desirous of avoiding Washington on the way to Richmond and the South have used the Potomac River Bridge in large numbers. In the 12-month period ending September 1949, it was used by almost 900,000 vehicles. Only about 35 per cent of these were of Maryland origin. The others, with the possible exception of those of Virginia origin, were probably on long-distance trips.

These figures indicate that large numbers of motorists have recognized the advantages and have availed themselves of the existing facilities in order to avoid congested urban centers. To be sure, these facilities have increased the cost of the trip, but have at the same time effected a considerable saving of time. By using the Bay Bridge motorists will be able to accomplish a further time saving. It is estimated that at least one hour can be cut off travel time between the juncture of routes U.S. 13 and U.S. 40 in Delaware and routes U.S. 1 and U.S. 301 at Richmond, Virginia.

Certainly many motorists will be attracted to the new route for these reasons. The only major deterrent to its use may be the increased expense involved. Table 10 lists the present toll charges between Richmond and New York City as well as those expected with the opening of the Bay Bridge. Experience has shown that usually the advantages of such a route have more than offset the increased expense.

1/ Coverdale and Compitto, Traffic and Revenue Report, New Jersey Turnpike, September 1949, p. 31.

TABLE 10

AVERAGE TOLL CHARGES FOR PASSENGER CARS BETWEEN
NEW YORK CITY AND RICHMOND, VIRGINIA
1950 AND 1952

<u>Present Route, 1950</u>		<u>New Route, 1952</u>	
<u>Facility</u>	<u>Toll</u>	<u>Facility</u>	<u>Toll</u>
Holland Tunnel	\$0.50	Holland Tunnel	\$0.50
New Castle-Pennsville Ferry	.90	New Jersey Turnpike	1.75
Susquehanna River Bridge	.20	Delaware Memorial Bridge	.90
Potomac River Bridge	1.00	Chesapeake Bay Bridge	2.00
		Potomac River Bridge	1.00
Total		Total	
	\$2.60		\$6.15

However, active publicity of the advantages of this new route will be necessary to attract large numbers of users. Since the Bridge will be merely a link in a larger network of express highways, joint efforts publicizing the entire route should stimulate total traffic. Taking all factors into consideration, it is estimated that a total of approximately 2,000,000 vehicles will use the Bridge in its first year of operation. In future years, with effective joint publicity, an increase in traffic between five and ten per cent annually can be expected.

EFFECTS ON LAND VALUES

The benefits accruing to agriculture, manufacturing, and the trade and service industries should, in time, be reflected in increased land values in the Eastern Shore counties. While the exact effects on the assessable basis cannot be predicted, studies of the effects of other large-scale capital improvements show that land values consistently rise at a higher rate in the areas immediately affected by the improvement. 1/

1/ Review of New Jersey Business, "The Influence of the New Jersey Turnpike on the Future Development of the State," January 1950, pp.2,10.

The counties and the municipalities of the Eastern Shore, particularly those in the vicinity of the Bridge itself, the highway through Queen Anne's and Kent counties to Warwick, and the highway to Ocean City can expect to see like increases in the assessed valuation of property. Similar increases in the assessable basis can also be expected in the neighborhood of the many vacation centers which will benefit from the increased traffic.

EXPECTED INCOME FROM INCREASED TRAFFIC

The increase in traffic through the Eastern Shore will undoubtedly make greater use of local facilities, such as, filling stations and garages, restaurants, tourist houses, and hotels.

In the second quarter 1949, there were 282 retail filling stations, repair shops, and garages operating in the nine Eastern Shore counties. Together they employed an average of more than 800 workers and paid them a total of \$322,000 in wages for the three-month period. With the seasonal increase in tourist traffic during the summer months, employment and pay-rolls in these establishments in the third quarter 1949 was considerably higher.

During the year 1948, filling stations, repair shops, and garages on the Eastern Shore had a combined total income of more than \$7,000,000. How much the growth in through traffic on the Eastern Shore will increase this figure is impossible to predict, since travelers through the area may or may not purchase their gasoline and have their repairs made on the Shore. A two-cent tax differential in New Jersey's favor may operate against large-scale gasoline purchases in Maryland. However, with the completion of the Bridge, the increase of more than 1,000,000 vehicles passing through the Eastern Shore counties will necessarily make greater

use of these facilities and consequently increase gross income.

Although restaurants and tourist houses will probably be restricted along the new State highways through the Eastern Shore counties, those facilities adjoining the highways will of course be used by tourists.

More than 230 eating and drinking places are presently operated on the Eastern Shore to take care of the resident and visiting population. In the second quarter of 1949, a nonpeak period, they employed more than 1,000 workers and paid them more than \$300,000 in quarterly wages. The Eastern Shore counties also maintained some 75 hotels, rooming houses, and tourist homes employing more than 800 workers. In the second quarter of 1949 these workers earned almost \$160,000.

During the fiscal year 1949, total income to these establishments, estimated on the basis of Retail Sales and Use Tax collections, conservatively totaled almost \$17,000,000. With a total of 700,000 vehicles crossing the ferry during the year ending September 30, 1949, and a total forecast of 2,000,000 Bridge crossings following its completion, approximately 1,300,000 additional vehicles will be visiting the Eastern Shore. Of these about half will be travelers merely driving through the Shore. With an assumed average of three passengers per car including the driver, 1/ this traffic should bring about 2,000,000 additional travelers through the area.

While it is impossible to know exactly how much these travelers will spend in passing through the nine counties, some very rough approximations can be made. Assuming that an average of \$5 daily is spend for food and lodging, and that one in three of four tourists will stop on the Eastern Shore to eat or spend the night, it is estimated that an increase

1/ Estimates of the size of vacation parties varying from 2.44 persons per car to 4 are derived from U.S. Travel, A Digest, by U.S. Travel Division, National Park Service, U.S. Department of Interior, 1949, p. 2-18.

in gross income of about \$3,500,000 annually will accrue to these facilities. This minimum figure can be increased if special efforts are made to attract the potential trade with unusual restaurants or superior lodging places at reasonable rates. New or attractive tourist camps, like the luxury motel colony and restaurant proposed for construction on the Revell Highway, and restaurants specializing in Maryland food at fair prices may attract travelers who would otherwise stop elsewhere.

Any expenditures in excess of the assumed minimum average per person, plus those expenditures made in the area's filling stations and repair shops, will, of course, result in increased income to the Eastern Shore facilities in the vicinity of the projected new highways. This increased trade may affect all nine counties, but more than likely, what expenditures are made will be in those Eastern Shore counties north of the Bridge, principally Queen Anne's and Kent.

CHAPTER VII

THE BRIDGE AND ITS EFFECT ON THE VACATION TRADE

It is from increased vacation trade that the counties of the Eastern Shore will feel the greatest economic effect of the Bay Bridge. By the shortening of the distance and the travel time to the Eastern Shore, the Bay resorts, the many lovely inland areas, as well as the oceanside beaches will attract many new vacationers.

DISTANCE AND TRAVEL TIME TO SHORE RESORTS

With the opening of the Bridge and the network of new highways, residents of Washington and its environs may, within less than two hours, reach the Eastern Shore bay resorts. Vacationers from Metropolitan Baltimore may reach these same resorts via the Bridge within a period of about an hour and a quarter, as compared with the present two hours via the ferry and three and three quarter hours around the head of the Bay via Elkton. The shortening of travel time will make these resorts considerably more accessible and will undoubtedly result in great increases in the total number of visitors to the area. Table 11 compares the distance and estimated travel time from Washington and Baltimore to Queenstown in Queen Anne's County via Elkton and via the Ferry and the new Bridge.

TABLE 11

DISTANCE AND TRAVEL TIME FROM
WASHINGTON, D. C., AND BALTIMORE TO QUEENSTOWN, MARYLAND

<u>Distance to Queenstown</u>	<u>Via Elkton</u>	<u>Via Bay Crossing</u>	
From Washington, D. C.	145 miles	50 miles	
From Baltimore	110 "	42 "	
<u>Travel Time to Queenstown</u>	<u>Via Elkton</u>	<u>Via Bay Ferry 1/</u>	<u>Via Bay Bridge</u>
From Washington, D. C.	4 3/4 hours	2 1/2 hours	1 3/4 hours
From Baltimore	3 3/4 "	2 "	1 1/4 "

1/ Assuming an average of 45 minutes for crossing, including waiting time.

While some traffic may be deterred by the probable bridge toll of an average of \$2 per car, except in periods of economic recession, the saving of time will more than make up for the added expense.

Travel by vacationers to the Shore's oceanside will also be greatly facilitated by the Bridge. Vacationers from Baltimore now find that traveling to Ocean City via the ferry, a distance of about 140 miles, takes about four hours. This presupposes a wait at the ferry of approximately 20 minutes. On week ends during the summer months, however, the increased traffic usually lengthens total traveling time considerably. The Bridge should afford a time saving of between 40 minutes and an hour depending on the wait at the ferry. Travel time from both Baltimore and Washington to Ocean City should therefore be reduced to between three and three and a half hours.

Travel time, as well as distance, from Washington and Baltimore to such other popular beach resorts as Atlantic City, New Jersey, and Virginia Beach, Virginia, will be considerably greater than to the Delmarva beaches. With the delays of the Bay Ferry removed, Ocean City should attract a considerably larger number of vacationers from Baltimore and Washington.

During the peak summer months many visitors from Baltimore have preferred to go to the Shore the longer way, around the head of the Bay, via Elkton. This route now takes between four and five hours. The Bridge will affect a reduction in travel time, and a saving in gasoline for the users of this route, although it will add the expense of the probable average toll of \$2 per car.

ESTIMATES OF VACATION TRAFFIC

How many tourists now cross the Bay to spend their vacations on the Eastern Shore? This is difficult to determine with any degree of accuracy, but some estimates can be made. Figures for Bay crossings show a

decided increase during the peak summer months. It can reasonably be assumed that there is a normal year round pattern of ferry users. The increase shown during the summer months can be attributed to vacationers. As noted in Table 12, showing monthly ferry crossings for the two years ending

TABLE 12
MONTHLY TRAFFIC ON THE CHESAPEAKE BAY FERRY SYSTEM
OCTOBER 1947 TO SEPTEMBER 1949

<u>Month</u>	<u>Total</u>	<u>Automobiles</u>	<u>Trucks and Busses</u>
October 1947	50,924	42,447	8,477
November	44,790	38,216	6,574
<u>December</u>	<u>39,605</u>	<u>33,059</u>	<u>6,546</u>
January 1948	27,833	22,250	5,583
February	24,465	19,223	5,242
March	<u>39,966</u>	<u>32,608</u>	<u>7,358</u>
TOTAL	227,583	187,803	39,780
April	44,059	36,226	7,833
May	55,649	47,016	8,633
June	61,649	52,296	9,353
July	82,933	71,805	11,128
August	87,742	76,886	10,856
September	<u>68,760</u>	<u>58,531</u>	<u>10,229</u>
TOTAL	400,792	342,760	58,032
October	55,247	46,230	9,017
November	49,231	41,603	7,628
<u>December</u>	<u>42,238</u>	<u>35,430</u>	<u>6,808</u>
January 1949	38,796	32,412	6,384
February	35,968	29,798	6,170
March	<u>45,992</u>	<u>38,034</u>	<u>7,958</u>
TOTAL	267,472	223,507	43,965
April	52,239	44,138	8,101
May	64,832	55,062	9,770
June	73,875	62,770	11,105
July	97,411	84,235	13,176
August	94,166	82,021	12,145
September 1949	<u>71,743</u>	<u>61,551</u>	<u>10,192</u>
TOTAL	454,266	389,777	64,489

Source: State Roads Commission.

September 1949, traffic for the six-month periods April through September was almost double that in the first half of each year. In 1948 total crossings in the six-month period including the summer months exceeded the earlier period by 175,000. In 1949 the excess increased to almost 200,000. This traffic, assumed to be mainly vacationists, represented almost one third of total annual ferry crossings. To the 200,000 vacationists must be added the many vehicles taking the overland route. It has been estimated with utmost conservatism that between 25,000 and 50,000 vehicles now use this route. Adding these two figures we can say that about 240,000 vacation-bound vehicles travel to the Shore during the summer months.

In the discussion of total traffic expectation in the year following the opening of the Bridge (Chapter VI), it was estimated that there would be approximately 600,000 additional crossings by long-distance travelers passing through the Eastern Shore and a like number of new visitors to the area. Although vacationers now make up about one third of total annual traffic, they will probably comprise a larger percentage of the increase in traffic. Assuming that one half of the 600,000 new Bay crossings will carry vacationers, there will be 300,000 additional vacation-bound vehicles crossing the Bridge. With each crossing representing the coming as well as the return trip, we can say that 150,000 additional vehicles will carry vacationists to the Eastern Shore. Assuming three passengers per car including the driver, this would mean an increase of 450,000 new visitors to the Eastern Shore counties. This number should increase by between five and ten per cent annually depending upon the extent to which the recreational opportunities of the area are effectively publicized.

INCOME FROM VACATIONERS

In order to determine the income to be expected from this increase in vacation trade, numerous studies of average vacation expenditures have

been reviewed. A Department of Interior summary shows expenditures varying from an average of \$4.54 to \$9.47 daily, depending upon the type of facilities used as well as geographic location. 1/ A Florida study indicated expenditures varying from \$4.50 to \$7.50 daily with the lower figures spent in tourist houses, motels, and rented rooms and the higher in hotels. 2/ Duration of vacations, as noted in these reports, varied from 7 days in Oregon to 18 days in Idaho.

Vacations on the Eastern Shore vary from usual vacation travel. In the first place, this is an area with many small, relatively inexpensive facilities as well as some more elaborate hotels. In the second place, the Shore's proximity to Baltimore and Washington makes it especially attractive as a week-end vacation area. For these reasons, it is advisable to assume a reasonably low daily expenditure as well as a shorter average vacation. With an average expenditure for these visitors of \$5 per day, and a vacation of between 7 and 12 days' duration, additional gross income accruing to the eating and lodging facilities should approximate between \$15,750,000 and \$27,000,000 annually. The annual increase of from five to ten per cent in vacationists after 1953 should produce a further increase in gross annual income to these facilities.

While anticipated generally throughout the area, these increases will affect the Bay and oceanside counties chiefly. Ocean City in Worcester County can be expected to attract the largest number of visitors. Caroline County, which is inland, will probably witness little of this increased trade.

The amount that vacationists may be expected to spend in retail stores of all kinds, and on recreation and entertainment may be estimated

1/ Op. cit., pp. 2-17.

2/ Florida Power and Light Company, Evaluation of the Tourist Industry of the Halifax Area of Volusia County, Florida, 1947 (?), p. 21.

roughly. Since this is an area characterized by many small, relatively inexpensive facilities, it would not be valid to assume expenditures which compare with the \$4 to \$5 daily spent in an area like Miami Beach, Florida.^{1/} It does seem reasonable to assume a minimum expenditure of \$1 daily. With 450,000 additional visitors, this would mean an expected increase in gross income to these facilities of between \$3,150,000 and \$5,400,000.

Studies of the national vacation trade indicate the growing selectivity in tourist spending. The vacationist is spending less on souvenirs, gaudy cabaret entertainment, and night clubs. He is picking his tourist homes and resort hotels carefully on the basis of clean accommodations, good food, and first rate service at reasonable rates. If increased vacation trade is to be attracted to the Shore, expansion of facilities should be made with these factors in mind.

^{1/} Memorandum received from Statistical Department of American Hotel Association referring to results of study prepared by the Miami Beach Hotel Owners Association in 1949.

CHAPTER VIII
SUMMARY OF FINDINGS

1. Serving as a link in a projected interregional system of highways, the Chesapeake Bay Bridge will attract thousands of long-distance motorists through the counties of the Eastern Shore. Their expenditures for food and lodging will produce an additional gross income of at least \$3,500,000 annually. Any expenditures which they make for gasoline, automobile supplies, and repairs will represent a further increase in gross income. To realize the full potential of this income, traffic should be stimulated by joint efforts publicizing the entire interregional system of highways.
2. The Bridge should bring as many as 450,000 new vacationers to the Eastern Shore counties in the first year of its operation. The growth in vacation trade can be expected to produce an increase in gross income to eating and lodging facilities of between \$15,750,000 and \$27,000,000 annually. Expenditures in retail stores and on recreation and entertainment should add another \$3,150,000 to \$5,400,000 in gross income. These are minimum figures which can be greatly increased by expanding and improving facilities to offer more and better accommodations, better food, and first-rate service at reasonable rates.
3. Retail trade on the Eastern Shore will be indirectly affected by any increases in income resulting from the expansion of agriculture or industrial production. Gross income in retail trade will be more directly affected by the expenditures of the many tourists and vacationers traveling to the Shore over the new Bridge.

4. By shortening the distance and the travel time between Baltimore and the Eastern Shore, the Bridge is likely to encourage the expansion of the existing manufacturing establishments as well as the location of new facilities on the Shore. This growth will be a long-term process.
5. The Bridge will have little effect in the short run on Eastern Shore agriculture. It may produce some changes in the current patterns of marketing agricultural produce. In addition, the expanded tourist and vacation trade, as well as any increases in population resulting from the growth of manufacturing and trade, will increase the market for local produce.
6. The benefits accruing to agriculture, industry, and trade, and service will be reflected in increased land values in the counties of the Eastern Shore.

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