

# Regional Patapsco Greenway Project



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## **Executive Summary**

The Regional Patapsco Greenway (RPG) project ascertains the potential economic impact of adding shared-use pathways connected to a network of shared-use pathways between the following destinations:

- Baltimore City's Inner Harbor
- the existing BWI Trail
- Elkridge
- historic Ellicott City
- Catonsville
- the existing Grist Mill Trail

Currently, the Grist Mill Trail, between Ellicott City and Elkridge, starts at Elkridge but does not extend into Ellicott City. Howard County's Office of Transportation wants to extend the Grist Mill Trail into Historic Ellicott City and Catonsville, as well as extending it south to the existing BWI Trail and to Baltimore's Inner Harbor.

These extensions are expected to drive tourist traffic to the connected nodes, and to improve business revenue and growth, reduce congestion, improve public health, improve air quality, and provide recreational pathways for non-motorized traffic (see Figure 1).

This report researches the economic impact of similar projects on their communities, and will help evaluate the potential benefits of building the regional pathway network. This report reviews impacts on public health, property values, congestion, air quality, tourism, sales revenue and potential business accrument. The resulting compiled data shows the potential economic impact if this network of shared-use pathways were to be completed.

Data was gathered from multiple sources, analyzed, and used to make projections about the potential economic impact of building the shared-use pathway. Current economic data was gathered from Environmental Systems Research Institute (ESRI) Business Analysis Online. Scholarly articles and previous impact studies were used to make projections based on the ESRI data. Specifically, the ESRI data was gathered from a quarter mile on either side of the proposed RPG pathway public health, congestion, air quality, tourism, business revenue, and business accrual data (see figure 2) were compared to the economic impact studies. Based on the research, extrapolations were made to predict the impact of building the RPG project.

## **Background**

The Grist Mill Trail runs along the Patapsco River but does not connect to other shared-use pathways and activity centers in Howard County, Anne Arundel County, or

Baltimore County. Previous economic impact studies have shown positive benefits after construction of shared-use pathways.

Howard County is exploring the potential economic impact of a network of pathways that connect existing pathways and activity centers in the aforementioned communities. They want to find out the current economy along the proposed pathway network and make projections based on previous economic impact studies. This report presents the results of this endeavor.

## **Objectives**

The Regional Patapsco Greenway project's goal is to explore the economic impact of a direct, high quality, shared-use pathway connection between the following destinations:

- Baltimore City's Inner Harbor
- the BWI employment corridor, BWI airport, and the existing BWI Trail
- Elkridge
- historic Ellicott City
- Catonsville.

The main objective is to describe the potential economic impact on the affected communities if the RPG were built.

## **Methodology**

The economic impact studies for similar shared-use pathways were conducted by passing out surveys to walkers and bikers on the pathway, as well as by sending surveys to all the businesses along the pathway. This is how they were able to get information such as business revenue, tourism, etc.

For the main economic impact study, The Great Allegheny Passage (GAP) Economic Impact Study, data was collected using more than 1,000 volunteer hours over the course of six months spent administering surveys and entering the data (Report).

By comparison, the time frame for RPG project was three months. The project needed comparable data but without the luxury of collecting it over six months using many volunteers. Government databases were explored, but they categorized their data by zip code or by giving statistics for the entire county. This would not be comparable because the GAP study referenced collected data from businesses and examined the impact along the pathway.

Ultimately the data for this report was collected using Environmental Systems Research Institute (ESRI) Business Analyst Online. This software platform enabled the collection of information on business revenue, congestion, and medical expenditures. Subjects such

as business accrual, air quality, tourism, and property values were not included in the ESRI data and were addressed using previous impact studies and general projections.

Great care was taken to ensure a direct correlation between collected data and previous impact studies. The goal was to give meaningful, accurate data projections. Wherever there was not a specific correlation, it was duly noted. The ESRI software produced 136 reports of relevant data that were sorted and analyzed.

The RPG project focused on the expected economic impact on the specific affected areas, assuming the pathway is built. The research was used to predict the shared-use pathway's effect on the Regional Patapsco Greenway project area. For instance, if the research into similar projects determined an expected business revenue increase of 10 percent, current business revenue along the RPG pathway was increased by 10 percent to show the expected result of building the pathway.

## **Key Findings**

The challenge for this project was gathering comparable research that enabled accurate extrapolation of these six areas of impact onto the proposed shared-use pathways. The resulting analysis will be used to ascertain the economic feasibility of constructing the entire project.

The GAP study's key finding was that the mean percentage of business revenue attributed to the pathway eight to nine years after construction was 25.5 percent. So, the total current business revenue from ESRI data, \$213 million, can be extrapolated to project \$54 million in annual revenue attributable to the RPG pathway, eight to nine years after its construction (see Figure 3).

## **Maps**

The Grist Mill Trail is an existing shared-use pathway that runs from near the City of Elkridge through the Patapsco Valley State Park north to Ilchester Road. The Howard County Office of Transportation is proposing a regional Patapsco Greenway project that would link the Grist Mill Trail north into Ellicott City and south through Patapsco Valley State Park following the Patapsco River to Baltimore City's Inner Harbor.

These route extensions would provide access to the BWI employment corridor and BWI Airport. The route would include one junction linking this proposed trail to Catonsville (including Catonsville Community College and University of Maryland Baltimore County). Howard County hopes to involve Anne Arundel County, Baltimore County, and the City of Baltimore in the project. Figure 1 illustrates the proposed and existing shared-use pathways.

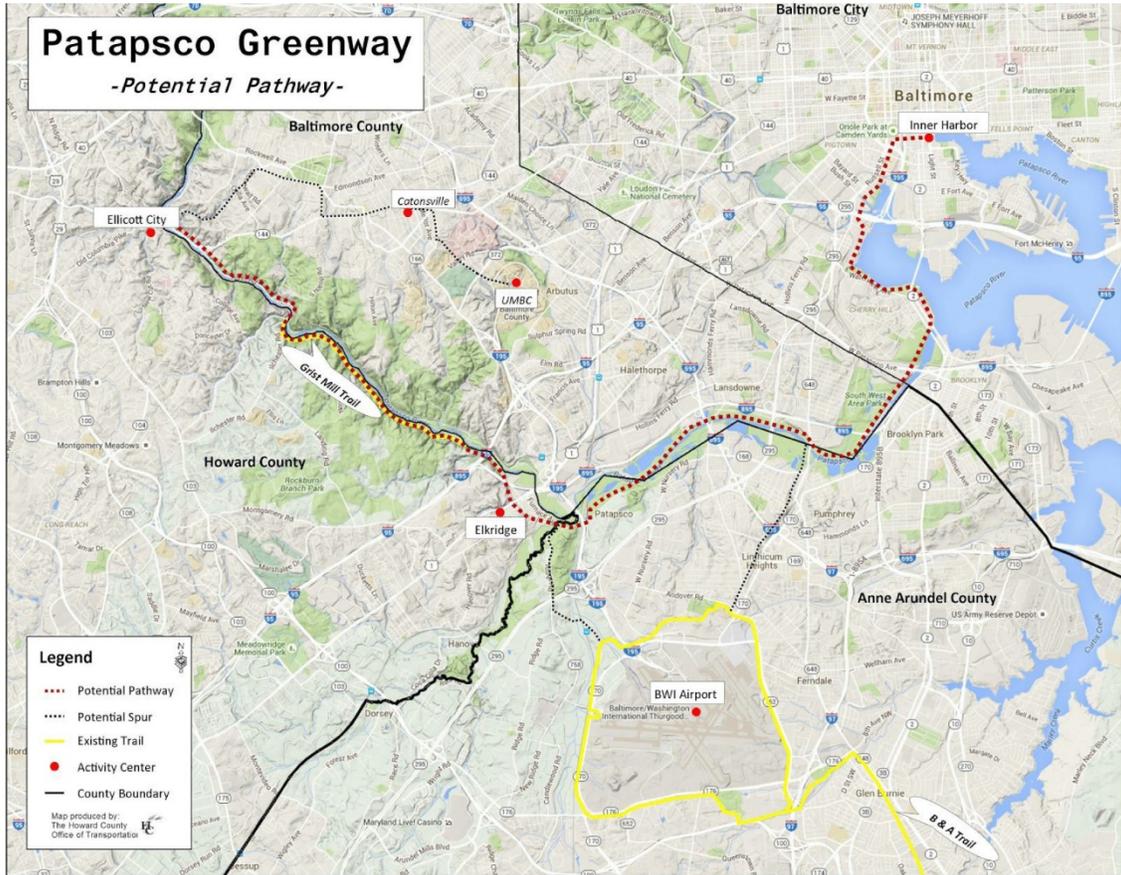


Figure 1

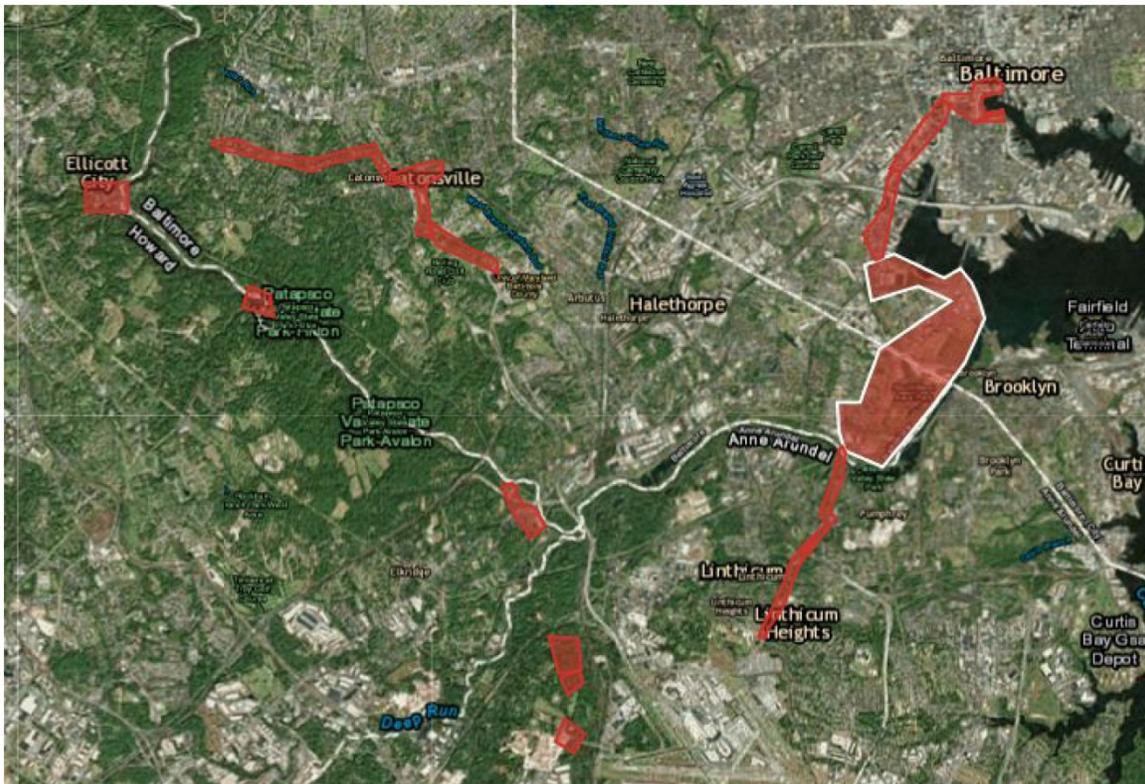


Figure 2

ESRI data was collected from shapefiles approximately 1/4 mile on either side of the proposed and existing pathways. The gaps in Figure 2's map represent areas of the proposed pathway that have no businesses along it.

## Projections

### Business Revenue

Overall business revenue can be projected by comparing like categories in previous economic impact studies and current data pulled from ESRI. The ESRI data corresponds to the GAP in all categories, though the GAP combines some categories under the heading of "Retail," while the ESRI categories are broken down into more categories such as food and beverage stores, sporting goods, and hobby, book and music stores.

The specific, useable data in Table 1 is from the GAP and represents the percentage of revenue attributed to the trail in 2007, approximately nine years after its completion. It shows a mean percentage of 25.5 percent of revenue attributable to the trail.

*Percentage of Revenue Attributed to the Trail*

	Business Type					
	Total	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
<b>Bases:</b>	<b>117</b>	<b>40*</b>	<b>26*</b>	<b>22*</b>	<b>17*</b>	<b>12*</b>
None	16.2%	10.0%	3.8%	40.9%	0.0%	41.7%
Less than 5%	23.1%	25.0%	23.1%	31.8%	11.8%	16.7%
5% to 10%	10.3%	7.5%	11.5%	9.1%	11.8%	25.0%
11% to 50%	16.2%	12.5%	30.8%	9.1%	23.5%	0.0%
51% to 100%	18.8%	27.5%	0.0%	0.0%	52.9%	16.7%
Not applicable/refused/don't know	15.4%	20.0%	30.8%	9.1%	0.0%	0.0%
<i>Mean (percentage)</i>	<i>25.5%</i>	<i>33.3%</i>	<i>18.3%</i>	<i>2.7%</i>	<i>51.2%</i>	<i>15.8%</i>

\*Caution: small base sizes

Values highlighted in  were significantly higher than the values highlighted in .

Table 1: 2007 GAP Data Source (Report)

ESRI produced these categories with the corresponding 2014 business revenue, with a total of \$213,285,441 (Appendix A).

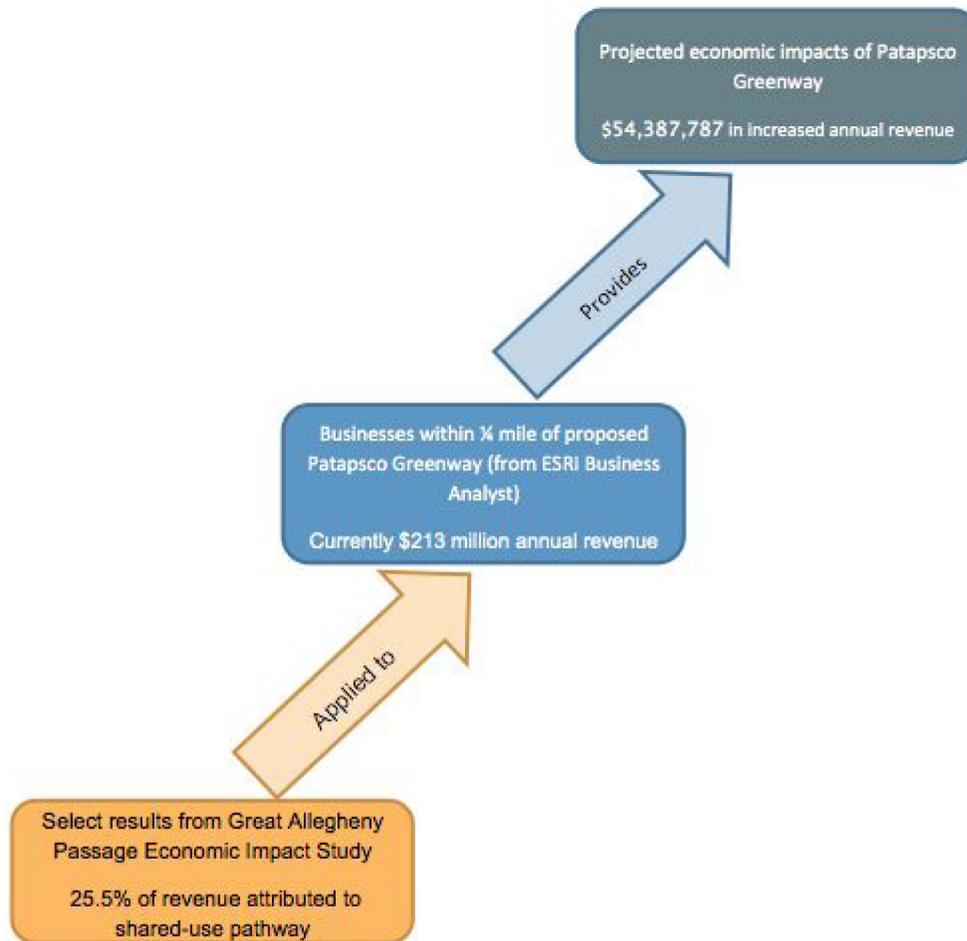


Figure 3

The GAP study found that the mean percentage of business revenue attributable to the pathway eight to nine years after construction was 25.5 percent. So, the total current business revenue from ESRI data, \$213 million, can be extrapolated to project \$54 million in annual revenue for the RPG trail, eight to nine years after its construction.

The percentage attributed to the GAP pathway taken again in 2009 was 23% (Table 2). So, year-to-year, the percentage can be expected to go up or down depending on the economy and other circumstances.

## Estimated Percentage of Trail Attributed Revenue – Business Type

	Phase III - Business Type					
	Phase III	Lodging	Rest- aurant	Retail	Outdoor/ Trail Business	Other
<b>Bases:</b>	<b>120</b>	<b>42*</b>	<b>37*</b>	<b>28*</b>	<b>8*</b>	<b>5*</b>
None	19.2%	16.7%	18.9%	28.6%	0.0%	20.0%
Less than 5%	18.3%	14.3%	21.6%	21.4%	12.5%	20.0%
5% to 10%	16.7%	16.7%	16.2%	17.9%	12.5%	20.0%
11% to 50%	24.2%	21.4%	32.4%	21.4%	12.5%	20.0%
51% to 100%	15.8%	28.6%	2.7%	3.6%	62.5%	0.0%
Refused/don't know	5.8%	2.4%	8.1%	7.1%	0.0%	20.0%
<b>Mean (percentage)</b>	<b>23.0%</b>	<b>31.2%</b>	<b>14.7%</b>	<b>11.5%</b>	<b>62.2%</b>	<b>6.8%</b>

\*Caution: small base sizes

Values highlighted in  were significantly higher than the values highlighted in .

Table 2: 2009 GAP Data Source (Report)

Another extrapolation is the revenue growth rate. The GAP study found that even though 2008 was a rough year economically, the pathway users contributed \$40,677,299 in receipts to the businesses operating on or around the trail—a 20 percent increase from 2007 to 2008 (\$32,614,703 and \$40,677,299 respectively) (Report).

This growth rate can be extrapolated to the RPG trail (from the \$54 million potentially attributed to the trail), if the RPG were in existence for approximately nine years, with an increasing growth rate in business revenue attributable to the trail. It cannot be claimed, however, that this 20 percent figure will be consistent. It only represents the increase between 2007 and 2008; it is not necessarily an exponential growth projection.

Other calculations from the data did not correspond properly because the categories do not match, so, no other extrapolations were made.

### Business Accrual and Growth

Another result from the GAP analysis was that in the first 10 years after the pathway's construction, 50 percent of businesses reported that they had started since the pathway was built. The same survey in 1998, when the GAP was completed, found that 57 percent of businesses said they had been operating for less than 10 years, representing a 7 percent decrease in new businesses from the previous 10 years.

This may be attributed to the fact that the GAP was being built and many businesses were started in anticipation of the GAP. These statistics were the only comparable business accrual evidence from the GAP study, and no meaningful projections can be made. There are currently 1,322 businesses along the proposed RPG.

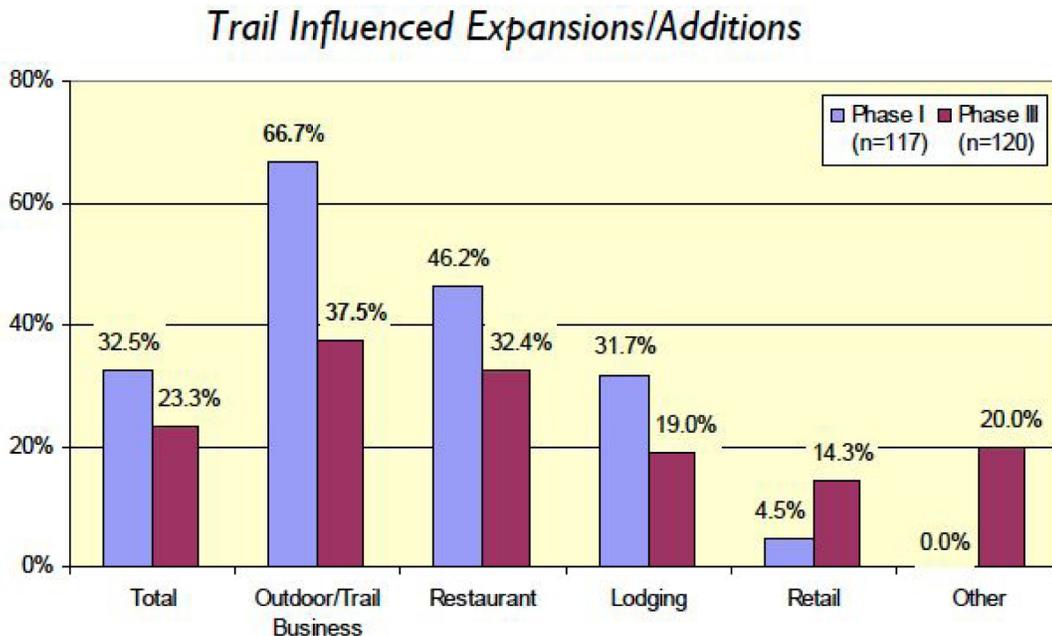
**Table 3: Business Accrual**

Years in Business	1998 Percentage	2007 Percentage
Less than a year	10	3
12 years	19	15
35 years	21	14
610 years	7	18
Total % 10 years or under	57	50

Source: (Report)

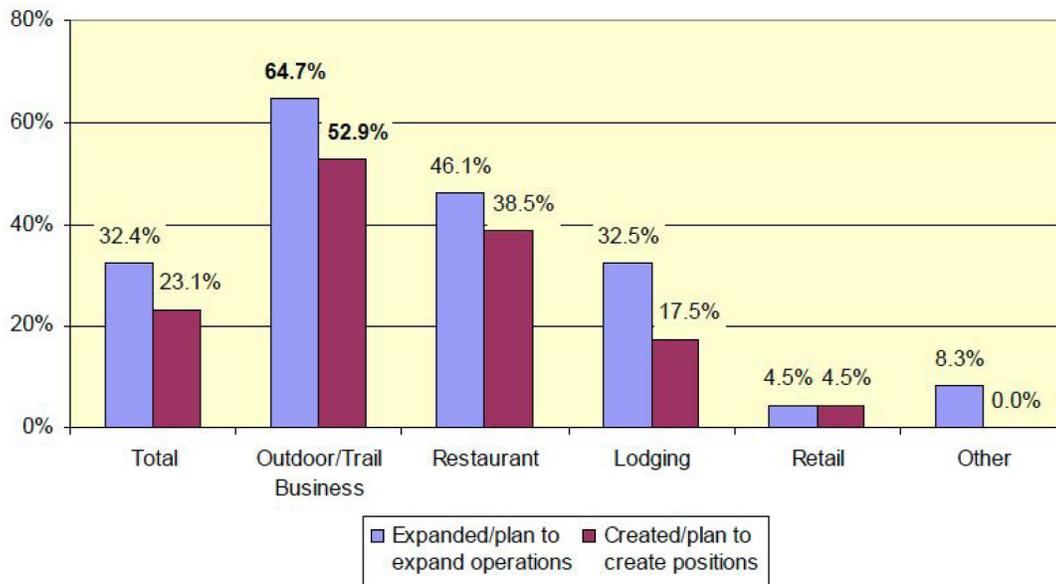
Business growth can be inferred using previous economic impact studies into the growth of businesses. For instance in the GAP study, 23.3 percent of the Phase 3, 2009 businesses surveyed reported that proximity to the trail influenced them to expand or make additions to their business. This was slightly lower than the survey from the 32.4 percent in 2007's Phase 1.

**Business Growth**



Graph 1: 2007 to 2009 Expansion Difference Source (Report)

## Trail Influenced Expansions/Additions



Graph 2: 2009 Expansion and Positions  
Source: (Report)

Other interesting findings from the GAP report related to business expansion:

- Of the Phase 3 businesses surveyed that were expanding or planning to expand their operations 96.4 percent of them were planning on expanding locations near the trail. This previous phase was 92.1 percent.
- 19.2 percent of Phase 3 businesses surveyed reported making new staff positions because of their closeness to the trail. The previous phase was 23.1 percent.
- Additionally, 25 percent of the same business owners have planned to expand operations within the next year because of the closeness to the trail.
- Expansions/additions to facilities and/or services were mentioned most often among outdoor and trail related businesses and restaurants.

There are currently 25,534 employees along the proposed RPG and an expansion similar to the GAP expansion could be expected for the RPG.

## Tourism

Tourism for the cities along the proposed RPG should benefit according to the GAP and other studies.

**Table 4: Visitors Generated by the WOW Trail, the GAP, and the Katy Trail**

Study	Local	Non-local
WOW	75%	25%
GAP	19.0%	81%
Katy trail	33%	67%
Average	42.3%	57.7%

Source: (Economic) (Katy) (Report)

Tourism may depend on location and attractions. Three major economic impact studies (Table 4) show the possible local and non-local visitors. It's important to distinguish between local and non-local because non-local visitors spend more than local residents. Without a home nearby, non-local visitors tend to spend more money for food, beverages, and lodging along the pathway.

The non-local statistics are important since ESRI showed no lodging businesses within a quarter mile of the proposed RPG. This would suggest that if the RPG existed, there would be new, attractive opportunities for lodging business, such as bed and breakfasts and hotels.

Of pathway users that stayed overnight, most stayed two or more nights and estimated spending of an average of \$65 per night for accommodations. Pathway users reported spending:

- \$24 per night for campgrounds
- \$96 per night at bed and breakfasts
- \$87 per night at a hotel/motel
- 40.8 percent of pathway users planned to stay overnight as part of their visit
- Overnight visitors spent an average of \$98 a day in pathway localities plus lodging
- Local pathway users spent an average of \$13 each pathway use
- Pathway users who traveled 50 miles or more spent about twice as much locally as those traveling less than 50 miles (Report).

Table 5 from the GAP gives an idea of daily spending along pathways.

## Reported Spending by Trail Users

	Trail Users Spending			
	Personal		Group	
	% Purchasing	Mean	% Purchasing	Mean
<b>Bases:</b>	<b>858</b>		<b>635</b>	
Total (excluding package & lodging costs)	67%	\$23	33%	\$74
<b>Bases: Specific Items/Services</b>	<b>858</b>	<b>14*-521</b>	<b>635</b>	<b>13*-415</b>
-Beverages	56%	\$6	52%	\$18
-Clothing	7%	\$22	5%	\$57
-Candy/Snacks	21%	\$6	21%	\$17
-Daily Equipment Rental (bikes, etc.)	5%	\$22	8%	\$57
-Ice Cream	24%	\$5	27%	\$16
-Restaurants	56%	\$20	65%	\$65
-Souvenirs	10%	\$13	13%	\$25
-Transportation (shuttling, taxi, etc.)	2%	\$51	2%	\$117
-Other (sunscreen, film, etc.)	8%	\$15	9%	\$21
Individual/Group Package Costs	8%	\$350	11%	\$2,970

**\*Caution: small base sizes**

Table 5 Source (Report)

### Public Health

Another important area to highlight concerning the construction of a shared-use pathway is public health. The ESRI data showed health expenditures of \$9,082,351 (Appendix B) along the proposed pathway. However, this information is not directly comparable to information on public health data from previous economic impact studies. It gives information such as how much is spent on dental, physicians, and eye care, but to say that these costs will go up or down based on the construction of a shared-use pathway would be difficult.

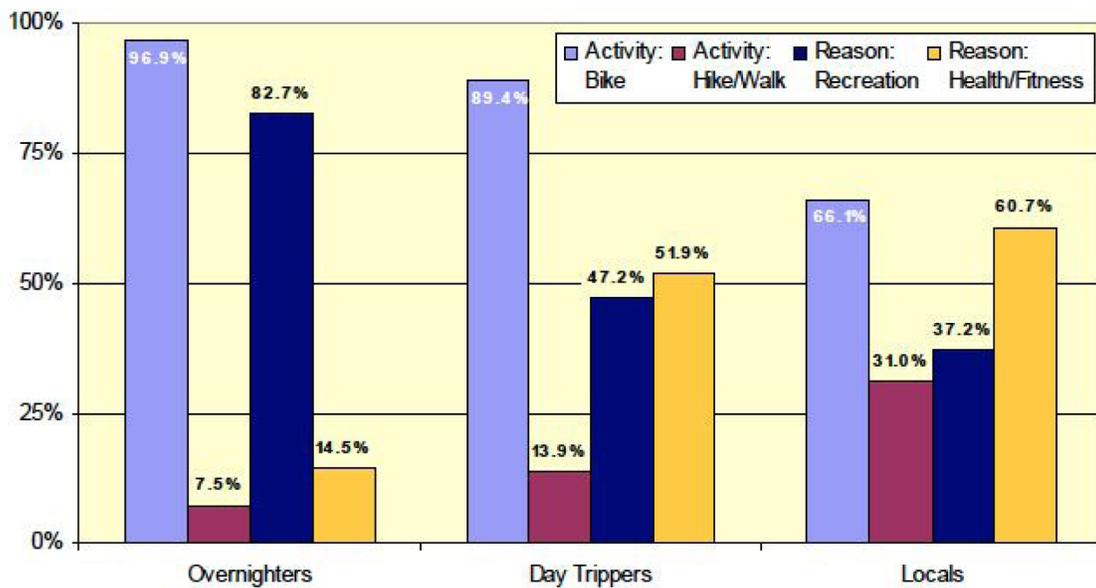
What could be considered is the number of local users and general studies about the effects of exercise on business productivity and personal health. Physically active communities are healthy communities. Many Marylanders, according to Bike Maryland, do not get enough exercise, and as a result contribute to increased health care costs (Bicycling).

### Benefits for Public Health

- Businesses with active employees should benefit; employees who commute by bicycle take fewer sick days.
- Healthcare costs continue to rise due to increasing obesity rates. Maryland is the 29th most obese state. According to the Centers for Disease Control, 27.1 percent of

adult Marylanders are obese and 65.4 percent are overweight, which leads to a variety of chronic diseases.

- By 2030, Maryland health care costs may climb by 21.3 percent due to high levels of obesity.
- Community-based physical activity interventions are cost effective because it is three to four times less expensive to teach a sedentary adult how to integrate physical activity into their life instead of enrolling them in an exercise program.
- Physical activity during leisure time may not be enough to prevent obesity, and Marylanders need to incorporate active transportation into their daily lives.
- Bicycling and physical activity are beneficial to Maryland; intervention is necessary to prevent future inflated health costs due to a sedentary and obese population (Bicycling).



Graph 3  
Source: (Report)

Graph 3 shows the reasons locals used the GAP—mostly for health and fitness. Since health expenditures go down in a more fit community, it can be expected that health care costs will go down if the RPG is built. Currently, annual health expenditures along the RPG are \$9,082,351 (Appendix B).

### Congestion and Air Quality

The ESRI data produced traffic counts for the affected areas. However, the other studies did not give percentage of increase or decrease in traffic congestion based on the trails. Generally, according to Bike Maryland, pathways increase bicycle commuter rates and reduce bicycle related traffic fatalities (Bicycling). The RPG can reduce congestion due to

tourism as well. For instance, Ellicott City has limited parking. So, if a percentage of non-local visitors used the RPG to get into historical Ellicott City it would reduce parking and roadway congestion.

Furthermore, Hamilton and Casey present evidence in their report "Bicycle Infrastructure and Traffic Congestion: Evidence from DC's Capital Bikeshare," that vehicle emissions are reduced by encouraging commuting by means other than a vehicle (Hamilton and Casey). Also, according to Bike Maryland, vehicular traffic can decrease when safe infrastructure is provided for local walking and biking trips. Bicycle and pedestrian infrastructure can save state and local governments money through reduced road maintenance costs, since bicyclists and pedestrians contribute less to road wear (Bicycling).

### **Property Values**

One of the most verifiable economic impacts is the increase in property values. The ESRI data does not, however, include property values and, as with some other categories, the available data covers too wide an area to be meaningful.

Previous economic impact studies include some statistics for property value increases:

- Property values along shared-use pathways increase because the routes are attractive to potential residents. A Portland, Oregon survey found that 62 percent of new residents cited the city's bike-friendliness as a factor in their decision to move there (Bicycling).
- Homes sales were examined in the seven Massachusetts towns through which the Minuteman Bikeway and Nashua River Rail Trail run. Analysis of listing prices, selling prices, and days on the market shows that homes near shared-use pathways sold at 99.3 percent of the listing price as compared to 98.1 percent of the listing price for other homes in these towns. The most significant feature of home sales near shared-use pathways is that these homes sold in an average of 29.3 days as compared to 50.4 days for other homes (Bicycle).
- "A 1998 study of property values along the Mountain Bay Trail in Brown County, Wisconsin shows that lots adjacent to the rail sold faster and for an average of 9 percent more than similar property not located next to the trail" (Bicycle).
- "Realizing the selling power of greenways, developers of the Shepherd's Vineyard housing development in Apex, North Carolina added \$5,000 to the price of 40 homes adjacent to the regional greenway. Those homes were still the first to sell" (Bicycle).

These examples from empirical studies show some of the many ways that property values are affected positively by the construction of shared-use pathways. The same types of positive results should be expected for property values along the proposed RPG.

## **Conclusions**

This study has presented the background for the RPG project and methodology used for deriving projections if it should be built.

Its key findings are:

- a projected increase in annual business revenue of 25.5 percent, resulting in \$54 million in additional annual revenue within eight to nine years of construction
- an increase in business growth and accrual based on empirical economic impact studies
- tourism would be positively impacted along the proposed RPG since most visitors to pathways are non-local
- public health would be improved because most local users use the pathways for health and fitness
- air quality could be improved and traffic congestion reduced because a percentage of pathway users are commuting, therefore reducing vehicular emissions
- property values will go up along the pathway, based on many studies.

## **Recommendations**

This report can be used to make specific and general recommendations. Specifically the RPG can be promoted based on business revenue and growth. The tourism, public health, air quality, and property value findings are a collection of empirical data showing the benefits of building a shared-use pathway.

A key finding and recommendation is that ESRI turned up no lodging data. This should be an area of promotion if the RPG project gets approved. Entrepreneurial lodging options should be encouraged, including bed-and-breakfast and camping sites to accommodate the probable increase in tourism. The ESRI data can be further studied to provide other projections for future studies.

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## Appendix

### Appendix A: Business Revenue From ESRI Shapefiles 17 Shapefiles 815 Total Retail Marketplace Profile \$213,285,441

#### Appendix A: Business Revenue From ESRI Shapefiles 1-7

Shapefile	1	2	3	4	5	6	7
<b>Retail marketplace profile</b>							
Food & Beverage Stores	\$1,075,528	\$0.00	\$2,510,580.00	\$432,237.00	\$0.00	\$1,571,582.00	\$6,362,106.00
Health & Personal Care Stores	\$149,467	\$0.00	\$613,712.00	\$0.00	\$0.00	\$29,597,156.00	\$807,974.00
Clothing & Clothing Accessories Stores	\$1,489,459	\$0.00	\$147,207.00	\$275,837.00	\$118,929.00	\$4,908,918.00	\$0.00
Sporting Goods, Hobby, Book & Music Stores	\$303,838	\$0.00	\$0.00	\$0.00	\$0.00	\$1,931,747.00	\$471,437.00
General Merchandise Stores	\$746,261	\$0.00	\$0.00	\$0.00	\$0.00	\$11,418,100.00	\$0.00
Miscellaneous Store Retailers	\$869,637	\$125,628.00	\$132,928.00	\$33,174.00	\$2,139,274.00	\$473,975.00	\$278,718.00
Food Services & Drinking Places	\$3,885,316	\$1,215,009.00	\$782,734.00	\$359,223.00	\$1,390,455.00	\$51,894,693.00	\$3,553,894.00
<b>Total</b>	<b>\$8,519,506.00</b>	<b>\$1,340,637.00</b>	<b>\$4,187,161.00</b>	<b>\$1,100,471.00</b>	<b>\$3,648,658.00</b>	<b>\$101,796,171.00</b>	<b>\$11,474,129.00</b>

#### Shapefiles 8-15

Shapefile	8	9	10	11	12	13	14 BWI
<b>Retail marketplace profile</b>							
Food & Beverage Stores	\$0.00	\$0.00	\$0.00	\$0.00	\$421,664.00	\$1,404,267.00	\$0.00 \$19,338,513.00
Health & Personal Care Stores	\$0.00	\$0.00	\$0.00	\$0.00	\$689,935.00	\$3,093,136.00	\$0.00 \$976,243.00
Clothing & Clothing Accessories Stores	\$0.00	\$0.00	\$0.00	\$0.00		\$894,146.00	\$0.00 \$1,514,625.00
Sporting Goods, Hobby, Book & Music Stores	\$0.00	\$0.00	\$0.00	\$0.00		\$2,803,091.00	\$0.00 \$1,069,230.00
General Merchandise Stores	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00 \$27,425,366.00
Miscellaneous Store Retailers	\$0.00	\$0.00	\$0.00	\$0.00	\$119,695.00	\$2,568,607.00	\$0.00 \$1,233,539.00
Food Services & Drinking Places	\$0.00	\$0.00	\$0.00	\$0.00	\$748,916.00	\$7,587,935.00	\$0.00 \$9,329,800.00
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,980,210.00</b>	<b>\$18,351,182.00</b>	<b>\$0.00 \$60,887,316.00</b>

Total Retail Marketplace Profile \$213,285,441

## Appendix B: Medical Expenditures From ESRI

#### Appendix B: Medical Expenditures From ESRI

Medical Expenditures	1	2	3	4	5	6	7
	\$364,684.00	\$269,911.00	\$2,342,559.00	\$275,820.00	\$5,527.00	\$1,782,910.00	\$312,879.00
	8	9	10	11	12	13	14 BWI
	\$0.00	\$0.00	\$0.00	\$23,119.00	\$376,768.00	\$659,285.00	\$335,470.00
							\$2,333,419.00
							Total Retail Marketplace Profile
							\$9,082,351.00