

Maryland Lodging Monitor

The Maryland Office of Tourism's bi-annual report on Maryland lodging data supplied by Smith Travel Research, Inc. Data for January – December 2013.

Lodging room demand statewide declined 1.4 percent in calendar year 2013, compared to 2012. Maryland's demand was higher than the region, and grew less than the nation's. The number of rooms available (room supply) remained relatively flat across the state (0.3 percent), region (0.4 percent), and nation (0.7 percent).

Average room rates for Maryland were at \$113.73 – higher than the nation's \$110.35 rate and lower than the regional rate of \$117.21. Total room revenue for the state decreased by 0.8 percent compared to 2012. Occupancy rates, which reflect changes in supply and demand for rooms, averaged 60.0 percent, 1.6 percent lower than last year, compared to 60.4 percent occupancy rate and 2.0 percent decline for the region. The national occupancy rate grew 1.5 percent, averaging 62.3 percent.

Calendar Year 2013 Lodging Performance

Segment	Room Demand % Change	Room Supply % Change	Room Revenue % Change	Average Room Rate (\$)	Room Rate % Change	Occupancy Rate	Occupancy % Change	Number of Rooms Sampled
United States	2.2	0.7	6.2	110.35	3.9	62.3	1.5	3.5M
DC-MD-VA-DE Region	-1.6	0.4	-1.2	117.21	0.4	60.4	-2.0	296,586
Maryland	-1.4	0.3	-0.8	113.73	0.6	60.0	-1.6	63,949

MD Counties

Baltimore City	1.6	-0.0	5.8	154.39	4.2	64.0	1.6	8,530
Allegany	5.2	-1.5	7.6	87.29	2.3	56.2	6.8	913
Anne Arundel	-0.4	0.2	-1.5	99.24	-1.1	69.0	-0.6	9655
Baltimore	-1.6	1.4	-1.1	89.98	0.5	59.9	-2.9	4883
Calvert	-11.5	0.0	-12.5	100.83	-1.1	47.1	-11.5	772
Cecil	1.2	0.2	3.3	76.05	2.1	53.3	1.0	870
Charles	-9.2	-11.7	-9.9	82.30	-0.8	58.8	2.9	969
Dorchester	-2.4	-0.0	-4.5	170.85	-2.1	48.8	-2.4	600
Frederick	-3.5	4.1	-3.8	87.48	-0.3	61.4	-7.3	2103
Harford	-7.3	-1.6	-4.6	84.86	2.9	56.0	-5.7	2394
Howard	1.1	2.9	0.8	89.40	-0.2	61.9	-1.8	3335
Montgomery	-1.2	-0.7	-3.4	119.65	-2.2	64.1	-0.5	9345
Prince George's	-3.6	1.8	-4.7	122.65	-1.1	59.5	-5.4	9751
Queen Anne's	-2.0	0.0	0.4	121.12	2.4	48.9	-2.0	403
St Mary's	-6.3	2.0	-8.8	90.66	-2.7	45.2	-8.1	1025
Talbot	-2.7	1.6	2.4	161.95	5.3	44.7	-4.2	693
Washington	-1.4	-3.0	-0.8	75.29	0.6	56.1	1.7	1924
Wicomico	0.7	-0.0	2.8	90.91	2.1	47.5	0.8	1234
Worcester	-0.4	0.6	1.3	149.32	1.8	52.5	-1.1	3207

MD Regions

Western Region	0.4	-2.2	1.9	80.06	1.5	55.3	2.6	3,008
Capital Region	-2.6	0.9	-4.1	117.56	-1.5	61.7	-3.5	21,199
Central Region	-0.4	0.5	1.3	109.69	1.7	63.8	-0.9	29,723
Southern Region	-8.8	-4.6	-10.2	88.87	-1.5	51.3	-4.4	2,766
Upper Eastern Shore	-1.0	0.5	0.3	124.73	1.3	48.7	-1.5	2,760
Lower Eastern Shore	-0.3	0.5	1.4	139.18	1.8	51.4	-0.8	4,493

Source: Smith Travel Research, Inc.; County data unavailable due to small sample sizes in Caroline, Carroll, Garrett, Kent and Somerset counties. Data for these counties is included in their respective regions.