

# 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 – June 2014.

Maryland's lodging performance accelerated in the first half of 2014, with room demand statewide increasing 4.7 percent, compared to the same six-month period in 2013. Maryland's demand grew more than the region's 3.2 percent and the nation's 4.1 percent. The number of rooms available (room supply) remained relatively flat across the state (0.2 percent), region (0.4 percent), and nation (0.8 percent).

The average room rate for Maryland was \$112.27 – lower than the nation's \$114.06 rate and the regional rate of \$119.01. Total room revenue for the state increased 5 percent compared to the same six-month period in 2013, twice the pace of regional growth. Occupancy rates, which reflect changes in supply and demand for rooms, averaged 62.1 percent, 4.5 percent more than last year. The national occupancy rate was 63.7 percent, 3.3 percent more than last year and the region's occupancy rate was 62.5 percent, 2.8 percent more than last year.

## January – June 2014 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	4.1	0.8	8.4	114.06	4.1	63.7	3.3	3,555M
DC-MD-VA-DE Region	3.2	0.4	2.5	119.01	(0.7)	62.5	2.8	300,799
Maryland	4.7	0.2	5.0	112.27	0.3	62.1	4.5	64,850

### Maryland Counties

Baltimore City	1.9	(1.2)	6.5	157.70	4.5	67.7	3.1	8,146
Allegany	20.9	0.0	29.7	87.52	7.3	58.4	20.9	913
Anne Arundel	4.1	(1.9)	4.2	98.92	0.1	73.0	6.1	9,655
Baltimore	6.1	3.1	4.7	90.80	(1.3)	62.0	2.9	5,497
Calvert	(4.2)	0.0	(7.4)	95.98	(3.3)	46.7	(4.2)	772
Cecil	8.6	0.0	10.7	77.51	1.9	56.7	8.6	870
Charles	1.1	(0.3)	0.1	82.09	(1.0)	62.0	1.4	969
Dorchester	1.8	0.0	1.8	163.34	(0.1)	45.9	1.8	600
Frederick	8.2	0.1	7.7	87.20	(0.5)	63.9	8.1	2,222
Harford	13.1	1.8	15.6	85.78	2.2	60.0	11.1	2,398
Howard	7.6	0.0	7.6	91.03	(0.0)	65.6	7.6	3,240
Montgomery	0.8	(0.4)	0.9	124.07	0.1	66.8	1.2	9,344
Prince George's	6.9	1.3	5.0	123.75	(1.8)	64.6	5.6	9,918
Queen Anne's	(8.0)	(7.5)	(4.4)	121.42	3.9	46.6	(0.6)	368
St Mary's	4.9	0.1	0.7	87.49	(3.9)	48.3	4.8	860
Talbot	8.8	6.2	9.0	148.03	0.2	41.2	2.4	687
Washington	6.8	2.1	7.1	75.41	0.3	57.3	4.6	1,976
Wicomico	1.5	(0.0)	5.4	85.31	3.8	44.7	1.6	1,234
Worcester	3.9	0.4	5.0	125.97	1.0	47.5	3.5	3,837

### MD Regions

Western Region	10.7	1.2	13.9	80.19	2.9	56.6	9.4	3,060
Capital Region	4.3	0.5	3.3	120.09	(1.0)	65.4	3.8	21,484
Central Region	4.9	(0.2)	6.1	110.49	1.2	67.3	5.1	29,863
Southern Region	1.1	(0.1)	(1.5)	86.63	(2.6)	53.6	1.2	2,601
Upper Eastern Shore	4.2	0.7	5.2	118.32	0.9	47.6	3.5	2,719
Lower Eastern Shore	3.5	0.3	5.1	118.43	1.5	46.8	3.1	5,123

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.