

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 2017.

Lodging room demand statewide increased 1.3 percent, compared to the same six-month period in 2016. Maryland's demand grew less than the region's 2.2 percent and the nation's growth of 2.5 percent. The number of rooms available (room supply) increased less than 1 percent (0.8) with the region and the nation growing 1.2 percent and 1.8 percent respectively.

The average room rate for Maryland was \$118.95 – lower than the nation's \$126.01 rate and lower than the regional rate of \$132.53. Total room revenue for the state increased 3.3, which is lower than both the nation's and the region's growth. Occupancy rates for Maryland, which reflect changes in supply and demand for rooms, remained relatively flat at 65.3 percent. The national occupancy rate was also flat at 65.4 percent and the region only seeing a 1 percent increase in occupancy compared to the same time last year.

January – June 2017 Lodging Performance

Segment	Room Demand % Change	Room Supply % Change	Room Revenue % Change	Average Room Rate (\$)	Room Rate % Change	Occupancy Rate	Occupancy % Change	Rooms Sampled
United States	2.5	1.8	4.9	\$126.01	2.3	65.4	0.7	3.8M
DC-MD-VA-DE Region	2.2	1.2	6.6	\$132.53	4.4	66.8	1.0	312,126
Maryland	1.3	0.8	3.3	\$118.95	2.0	65.3	0.5	67,076

MD Counties

Baltimore City	0.9	0.5	0.3	\$160.21	(-0.6)	67.8	0.4	8,271
Allegany	(-5.0)	5.9	(-3.7)	\$90.19	(-3.7)	53.0	(-10.3)	1,063
Anne Arundel	0.0	0.6	1.1	\$104.39	1.1	72.2	(-0.6)	9,969
Baltimore	0.3	1.6	0.6	\$96.30	0.6	64.9	(-1.3)	5,763
Calvert	17.1	0.0	16.1	\$96.31	16.1	67.0	17.1	772
Cecil	2.0	(-0.1)	(-0.9)	\$82.10	(-0.9)	59.5	2.1	869
Charles	(-5.2)	(-4.6)	1.4	\$98.01	1.4	70.0	(-0.7)	975
Dorchester	(-7.9)	0.0	(-7.0)	\$152.80	(-7.0)	44.3	(-7.9)	600
Frederick	0.0	0.0	3.8	\$89.96	3.8	64.1	(-0.1)	2,465
Harford	0.6	(-0.2)	0.3	\$89.64	0.3	62.0	0.8	2,439
Howard	2.0	0.0	2.8	\$96.42	2.8	67.6	2.0	3,151
Montgomery	1.1	(-0.7)	4.0	\$136.72	4.0	69.5	1.9	9,601
Prince George's	3.5	3.4	8.2	\$136.65	8.2	70.3	0.1	10,392
Queen Anne's	1.1	0.5	0.6	\$130.87	0.6	50.1	0.6	371
St. Mary's	11.1	0.0	17.4	\$84.78	17.4	72.4	11.1	999
Talbot	3.0	0.0	1.6	\$141.71	1.6	47.6	3.0	676
Washington	(-0.9)	2.0	3.4	\$79.57	3.4	58.2	(-2.9)	1,842
Wicomico	1.1	0.0	2.8	\$87.57	2.8	54.4	1.1	1,235
Worcester	2.9	1.1	5.6	\$130.18	5.6	53.7	1.8	4,277

MD Regions

Western Region	(-2.8)	2.7	0.0	\$83.63	2.9	55.2	(-5.4)	3,071
Capital Region	2.1	1.3	6.0	\$131.90	3.8	69.3	0.8	22,458
Central Region	0.5	0.6	0.8	\$115.13	0.3	68.1	(-0.1)	30,698
Southern Region	5.3	(-1.8)	10.0	\$92.52	4.4	70.2	7.3	2,746
Upper Eastern Shore	0.6	0.0	(-0.7)	\$118.28	(-1.3)	51.0	0.6	2,710
Lower Eastern Shore	2.6	0.9	5.3	\$121.94	2.6	53.7	1.7	5,564

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.