

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 2014.

Maryland's lodging performance accelerated during calendar year 2014, with room demand statewide increasing 5.9 percent, compared to calendar year 2013. Maryland's demand grew more than the region's 5.2 percent and the nation's 4.5 percent. The number of rooms available (room supply) remained relatively flat across the state (0.3 percent), region (0.4 percent) and nation (0.9 percent).

The average room rate for Maryland was \$115.60 – slightly higher than the nation's \$115.31 rate but lower than the regional rate of \$119.10. Total room revenue for the state increased 7.6 percent, higher than the region's 6.8 percent growth but lower than the nation's 9.2 percent. Occupancy rates, which reflect changes in supply and demand for rooms, averaged 63.5 percent, 5.5 percent more than last year. The national occupancy rate was 64.4 percent, 3.6 percent more than last year and the region's occupancy rate was 63.3 percent, 4.8 percent more than last year.

January – December 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	4.5	0.9	9.2	115.3	4.6	64.4	3.6	3,574M
DC-MD-VA-DE Region	5.2	0.4	6.8	119.1	1.5	63.3	4.8	300,172
Maryland	5.9	0.3	7.6	115.6	1.6	63.5	5.5	64,388

Maryland Counties

Baltimore City	1.9	(1.2)	6.8	161.5	4.7	68.4	3.1	8,170
Allegany	12.4	0.0	14.9	89.1	2.3	63.1	12.4	913
Anne Arundel	3.6	(1.6)	6.5	102.1	2.9	72.7	5.3	9,655
Baltimore	8.0	3.6	9.3	91.4	1.2	62.5	4.2	5,553
Calvert	5.5	0.0	2.3	97.7	(3.1)	49.7	5.5	772
Cecil	7.5	0.0	12.2	79.3	4.3	57.4	7.5	870
Charles	6.1	(0.2)	6.8	82.7	0.7	62.2	6.3	969
Dorchester	0.3	0.0	2.6	174.9	2.4	48.9	0.3	600
Frederick	6.2	0.1	5.1	86.8	(1.1)	64.7	6.1	2,228
Harford	16.6	2.6	19.2	86.9	2.3	63.7	13.7	2,398
Howard	6.5	0.0	8.4	91.6	1.8	66.0	6.5	3,240
Montgomery	4.5	0.5	7.0	122.5	2.4	66.6	4.0	9,308
Prince George's	9.2	1.5	9.6	122.0	0.4	63.9	7.6	10,037
Queen Anne's	(4.1)	(7.5)	0.0	126.5	4.3	50.6	3.7	368
St Mary's	7.0	(1.3)	4.7	88.8	(2.2)	49.0	8.4	899
Talbot	9.3	4.3	7.4	159.9	(1.7)	46.8	4.7	687
Washington	7.8	1.0	7.3	75.0	(0.5)	59.7	6.7	1,976
Wicomico	5.1	(0.0)	6.9	92.5	1.7	50.0	5.1	1,234
Worcester	4.5	0.1	5.2	150.4	0.6	54.9	4.4	3,223

MD Regions

Western Region	9.1	0.6	9.9	80.6	0.7	59.9	8.5	3,060
Capital Region	6.8	0.9	8.1	118.5	1.2	65.2	5.8	21,573
Central Region	5.2	0.0	8.0	112.8	2.6	67.8	5.2	29,887
Southern Region	6.3	(0.5)	5.0	87.8	(1.2)	54.7	6.8	2,640
Upper Eastern Shore	4.7	0.2	6.0	126.6	1.3	50.9	4.4	2,719
Lower Eastern Shore	4.7	0.1	5.4	140.2	0.7	53.8	4.7	4,509

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.