

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 2011

In 2011, lodging room demand was up 3 percent statewide compared to 2010. Maryland's demand growth surpassed that of the region but grew less than nationwide demand. The number of rooms available (room supply) remained relatively flat across the state, region, and nation for the second consecutive year. New development tapered off during 2010 – hotels are absorbing the recovery in demand with more consistent supply.

Average room rates for Maryland were close to \$111 – higher than the nation's \$102 room rate and lower than the regional room rate of \$116. Total room revenue is up 3.7 percent compared to 2010 mostly due to increases in demand and aided by slight room rate growth. Occupancy rates, which reflect changes in supply and demand for rooms, averaged 60.9 percent, 2.5 percent higher than last year, compared to a 60.1 percent national occupancy rate reflecting 4.4 percent growth for the U.S., and 61.2 percent regional occupancy rate reflecting 1.8 percent growth for the region.

January – December 2011 Lodging Performance

Segment	Room Demand % Change	Room Supply % Change	Room Revenue % Change	Average Room Rate (\$)	Room Rate % Change	Occupancy Rate	Occupancy % Change
United States	5	0.6	8.8	101.64	3.7	60.1	4.4
DC-MD-VA-DE Region	2.6	0.7	3.2	116.10	0.6	61.2	1.8
Maryland	3	0.5	3.7	110.94	0.7	60.9	2.5
<u>MD Counties</u>							
Baltimore City	3.6	1.4	4.2	138.48	0.6	62.3	2.2
Allegany	-2	0	-0.7	87.64	1.4	52.4	-2
Anne Arundel	2	0.9	3.7	97.16	1.7	69.6	1.1
Baltimore	7.9	-0.1	9.2	88.53	1.3	60.7	8
Calvert	-1.3	0	0.1	102.05	1.3	56.1	-1.3
Cecil	12.2	2.6	16.1	71.71	3.5	51.8	9.4
Charles	13.6	2	11.9	82.33	-1.5	58.1	11.3
Dorchester	-2.9	0	2.1	166.75	5.2	49.7	-2.9
Frederick	13.8	-1.3	13.4	82.19	-0.4	66.8	15.3
Harford	6.6	-0.8	13.7	79.87	6.7	62.4	7.4
Howard	6.1	-0.1	6.7	87.16	0.6	64.9	6.1
Montgomery	0.9	1.4	1.4	123.00	0.4	65.2	-0.4
Prince George's	0	-0.2	0.1	123.75	0.1	61.9	0.2
Queen Anne's	5.3	0	8.6	112.56	3.1	50.5	5.3
St Mary's	0.3	0.8	3.8	93.60	3.5	52.4	-0.5
Talbot	4.1	0.6	5.9	149.28	1.7	45.3	3.4
Washington	2.1	1.6	2.6	72.95	0.5	49.5	0.6
Wicomico	-2.3	-1	1.6	84.26	4.0	46.9	-1.3
Worcester	0.7	-0.6	1.9	139.62	1.2	52.7	1.2
<u>MD Regions</u>							
Western Region	1.1	0.9	1.7	78.34	0.5	50.2	0.2
Capital Region	1.7	0.4	1.5	119.00	-0.2	63.9	1.3
Central Region	4.3	0.7	5.6	105.29	1.2	64.8	3.7
Southern Region	5.9	1.2	6.2	90.09	0.2	55.9	4.7
Upper Eastern Shore	4.8	1	6.6	118.45	1.8	48.6	3.8
Lower Eastern Shore	0.1	-0.6	1.8	130.14	1.7	51.3	0.8

Source: Smith Travel Research, Inc.