The Economics of Dog Friendly Hospitality

The revenue case for canine hospitality

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Executive Summary

Dog owners are the most valuable guests most hotels have never properly served. They stay longer, spend more while they are in the building, and come back at twice the rate of everyone else. Yet half of the hotels that call themselves pet friendly fail a basic assessment of what they actually offer a dog, and the ones charging the most for the privilege tend to deliver the least.

This paper is about the money. It draws on Roch Dog's assessments of more than 3,000 hotels in 56 countries, ten years of search data from 14 countries, published studies and consumer surveys, and what the best run properties already do, to answer the four questions a general manager or marketing director actually has. How big is this? What do dog owning guests do differently? What does a hotel have to change to capture it? And what does it cost?

The short answers. The dog friendly hotel market is worth about $5 billion this year and growing at 12% a year, driven by a generation that spends more on its dogs than its parents did and increasingly will not travel without them. Booking data shows pet friendly properties running fuller and at higher rates than the properties next door, and the industry has long held that dog owners stay longer and come back more often, because once they find a hotel that genuinely welcomes the dog they stop looking. For a 250 room luxury hotel that works out at roughly $1.9 million a year in extra revenue under cautious assumptions, before a single dog walk or dog dinner is sold. The cost of getting there is a fraction of one room renovation.

The money comes from three places, in order. First, more bookings and longer stays, won by leading with the words dog friendly rather than pet friendly, publishing a clear policy, dropping arbitrary weight limits and pricing the fee as a service rather than a deterrent. Second, keeping the guest's spend inside the building: a dog allowed in the bar, lounge or terrace keeps its owner at the hotel's tables instead of the restaurant down the street. Third, selling the services a dog needs anyway: a walk at $35 to $200, a dog menu on 80% plus margins, treats and retail at the desk.

Most hotels capture none of this because nobody owns it. The policy was written by whoever handles the insurance, the fee is set to discourage, and the dog is confined to a room where it earns nothing. The fix is six operational decisions that cost almost nothing and can be made in 90 days. Section 10 lists them, and section 11 ranks every decision in this paper by what it costs and what it is worth.

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This second edition added original search research showing guests abandoning the words "pet friendly" in every mature market, the economics of the dog menu and the dog walk, and the regulatory shift that now makes a hidden pet fee a legal risk in the United States and the United Kingdom. The October 2026 revision brings every figure up to the latest published data and adds the newest academic and survey evidence, including the first controlled experiment on what dog owners will pay more for. It turns out they pay for people and shared spaces, not welcome baskets.

What This Paper Does and Does Not Do

This paper presents an economic analysis of dog friendly hospitality using a combination of internal and external data. It is intended to inform investment and operational decisions, not to prescribe a single solution.

What This Paper Does

It quantifies revenue potential using a transparent model with stated assumptions. It draws on the Roch Dog Assessment Dataset, covering more than 3,000 hotels across 56 countries, supplemented by third party market research, academic literature, primary search demand research, and press coverage. It presents controlled case studies of the InterContinental and Fairmont portfolios assessed under a single evaluation framework. It presents original Google Trends research covering 33 term comparisons across 14 markets over ten years. It identifies the behavioural patterns that drive measurable differences in occupancy, spend, and loyalty, and it itemises the ancillary products, canine menus, dog walking, and retail, that convert those patterns into revenue.

What It Does Not Do

It does not claim universal applicability. The revenue model is based on a luxury hotel archetype and will not translate directly to economy properties, resort settings, or markets with low dog ownership density. The dataset, while global in scope, is skewed toward North American and European properties. Cultural, regulatory, and operational factors vary significantly by market, and the paper does not attempt to account for all of them. The internal dataset has not been externally audited. Where the paper draws conclusions, they should be read as strongly indicated rather than definitively proven.

SECTION 1

Introduction

Dog ownership has reached a scale that the hospitality industry can no longer treat as peripheral. In the United States, 71 million households own a dog, 53% of all households and four million more than a year earlier, and 78% of dog owners travel with their dog. Canada now has nearly four times more pets than children under 18. Across EMEA, 47% of travellers identify pet friendliness as a critical factor in accommodation choices. These are current demand signals from a segment that is already booking, already spending, and already deciding which hotels deserve its loyalty.

This paper uses the term canine hospitality to describe the discipline: the structured, measurable practice of welcoming dogs and their owners as revenue guests, with the same operational seriousness a hotel applies to food and beverage or housekeeping. Canine hospitality is not a pet policy, because a policy is just a permission state. It is a product set, a service culture and a revenue line, and the properties that treat it that way are the ones capturing the numbers in this paper.

The demographic at the centre of the shift is the DINKWAD: Dual Income, No Kids, With A Dog. This group controls an estimated $259 billion in annual spending power, projected to reach $427 billion by 2030. Behind them stands a generational wave: the US pet industry reached $158 billion in 2025 and the American Pet Products Association projects $165 billion for 2026, Millennials are the top spending cohort at over $1,700 per household annually, and Gen Z pet ownership surged 43.5% in a single year. Every year that passes, the guest base skews further toward people for whom the dog is a family member whose treatment decides where the family stays.

The global dog friendly hotel segment is valued at $5.16 billion in 2026, up from $4.6 billion in 2025, and growing at 12.2% annually toward $8.17 billion by 2030. The broader pet inclusive travel market is valued at $30.99 billion, projected to reach $53.80 billion by 2033. Dogs dominate this segment, accounting for over 50% and in some luxury datasets as much as 90% of all pet related demand.

The findings that follow draw on the Roch Dog Assessment Dataset, third party market research, published academic studies from the universities of Surrey, Kyung Hee and Sungkyunkwan and from Buhalis and Chan (2023), original Google Trends demand research, and controlled brand case studies. They are intended for hotel owners, asset managers, brand leadership, and investors evaluating where the next increment of revenue growth will come from.

SECTION 2

The Performance Gap

The economics of dog friendly hospitality are available to every hotel that chooses to invest in this category. The problem is that most hotels have not made that choice. The gap between market demand and operational delivery is where the revenue is being lost. This section measures that gap with our own assessment data, hotel by hotel and brand by brand, because the size of the gap is the size of the opportunity: every property below the line is a property a competitor can take the dog business from.

2.1 The 49% Failure Rate

Across the Roch Dog Assessment Dataset, 49% of hotels that describe themselves as pet friendly score D or F when assessed against the Roch Dog Friendly Standard (RDFS-02), a criteria based framework covering policies, amenities, access, and guest experience across 31 weighted questions. These are not obscure guesthouses, they are branded, marketed, bookable hotels appearing under the pet friendly filter on every major platform.

The most common failures are structural: dogs excluded from all indoor shared spaces, arbitrary weight limits that exclude normal family dogs, no published policy, and rules applied differently depending on who is at the desk. Research consistently indicates that the majority of guests abandon bookings when they encounter inconsistent policies. Thirty three percent of pet parents have altered their travel plans entirely due to difficulties with pet travel arrangements.

It is worth noting that this failure rate is derived from the Roch Dog dataset, which has geographic skew toward North America and Europe, and has not been externally audited. The 49% figure should be understood as indicative of the scale of the problem rather than a precise global measurement.

2.2 The InterContinental Case Study

A controlled study of 30 InterContinental Hotels and Resorts properties, assessed under the identical RDFS-02 framework in December 2025, reveals what this variation looks like inside a single luxury brand. The scoring spread is 57 points, from an A+ property that ranks in the top 1% of the dataset to an F property that scores below zero. Of the 30 properties assessed, 21 either failed the standard or scored in the bottom two performance tiers.

InterContinental Property	Score	Grade	Pet Fee	Weight Limit
IC Miami	55	A+	$100 per stay	No limit
IC New York Barclay	39	A	Dogs stay free	50 lbs
IC Washington Willard	34	B	$200 per stay	40 lbs
IC Kansas City	29	B	$125 per stay	No limit
IC Houston	13	D	$150 per stay	50 lbs
IC San Diego	-1	F	$150 per stay	70 lbs
IC Washington D.C. Wharf	8	F	$250 per stay	25 lbs
IC New York Times Square	5	F	$250 per stay	75 lbs

There is no observable correlation between high fees and high performance: the two properties charging $250 both received F grades, while the highest performing property charges $100. A guest paying $250 at one InterContinental receives a measured experience nearly seven times weaker than a guest paying $100 at another.

2.3 The Kimpton Paradox

The most significant finding does not come from outside IHG at all, it comes from within. Kimpton Hotels and Restaurants is an IHG brand, operating under the same parent company, the same corporate leadership, and the same ownership and franchise infrastructure as InterContinental, and twenty two Kimpton properties were assessed under the identical RDFS-02 framework in the same December 2025 study.

Metric	InterContinental	Kimpton	Difference
Properties ranked	23	22	--
Average score	19.3	29.4	+52%
D+F rate	61%	23%	-38 percentage points
F grade count	5	0	-5
A grade or above	2 (9%)	5 (23%)	+14 percentage points
Score range	-1 to 55	17 to 45	28 point spread vs 57

In that study Kimpton averaged 52% higher than InterContinental, produced zero F grades, and posted a scoring spread half as wide. Not one Kimpton property charges a pet fee, imposes a weight limit, or requires a damage deposit. The operational knowledge to close the gap in the InterContinental portfolio already exists inside IHG, which means the constraint is not capability, it is strategic priority.

2.4 The Fairmont Study and the 2026 Brand League

In 2026, Roch Dog extended the controlled brand study approach to Fairmont Hotels and Resorts, with 40 properties assessed through anonymous guest enquiry under the same RDFS-02 framework. The pattern repeats. Fairmont, a brand whose marketing leans heavily on its dog friendly heritage, from resident canine ambassadors to doormen with treat pockets, averages 22.9 points in our sample, with a 48 point spread from -3 to 45. Fifteen of the 40 graded D or F, eight of them failing outright, while four graded A. The best of the portfolio proves the brand knows how, and the spread proves it has not yet decided that every property must.

Across the wider dataset, the same picture holds for every major group we have assessed in depth. The table below shows every scored property in the Roch Dog Assessment Dataset as of August 2026. Two things must be understood before reading it. These are samples of 6 to 40 properties, skewed toward flagships in major markets; they describe our sample, never a brand's full system, which may run to thousands of hotels. And where a property answers only part of an assessment, unanswered questions score No, so these figures are conservative floors rather than exact measurements.

Brand	Properties Scored	Average Score	Graded D or F
Kimpton	23	30.6	6 of 23
Four Seasons	12	29.3	4 of 12
Mandarin Oriental	7	23.1	3 of 7
Fairmont	40	22.9	15 of 40
InterContinental	21	19.6	14 of 21
Hilton	10	19.5	7 of 10
Sofitel	7	17.4	7 of 7
Hyatt	32	16.7	26 of 32
Sheraton	6	16.0	5 of 6
Marriott	6	8.7	6 of 6

Not one major brand in the sample averages an A grade, and the best portfolio average in our data is a B, with most of the industry's biggest names sitting in the C and D bands despite every one of them marketing itself as pet friendly. The league table is really the whole category in miniature, universal marketing laid over unmanaged delivery, and a leadership vacuum that no brand has yet chosen to fill.

2.5 What A+ Looks Like

InterContinental Miami demonstrates what is achievable within an existing operating framework. Its score of 55 places it in the top 1% of the dataset. It answered Yes to 19 of 31 evaluation criteria.

Miami provides access to the bar, terrace, public lounge, and garden. Dogs can stay in the room unaccompanied. There is no weight limit. The amenity provision includes dog food sold on property, real food and water bowls, free treats, walking route guidance, professional dog walking services, third party dog sitting, emergency vet contact, and canine charity support.

Its fee of $100 per stay sits below the portfolio median, because Miami does not charge more for a better experience, it charges less. At the bottom of the portfolio, InterContinental San Diego scored negative one and InterContinental New York Times Square scored 5 while charging $250, policies that actively penalise the guest for arriving with a dog.

SECTION 3

The Demand Signal

This section is for the marketing director. Between the first and second editions of this paper, Roch Dog conducted a primary research programme using Google Trends data, comparing search demand for dog friendly and pet friendly terms across 33 term pairs in 14 markets over the ten years from 2016 to 2025. The short version is that guests have changed the words they search with and most hotels have not noticed. The findings tell hotels, in the guests' own words, how this category should be marketed.

3.1 The Language Migration in Mature Markets

In every mature English speaking market, search demand is migrating from the pet generic term to the dog specific term. Comparing "pet friendly hotel" against "dog friendly hotel" as annual means of monthly search interest:

Market	"Pet friendly hotel" change 2022 to 2025	Dog term as % of pet term, 2016	2025	Crossover
United Kingdom	-26%	291%	468%	Before 2016
Ireland	-20%	127%	243%	2018
Australia	-16%	60%	137%	2023
United States	-17%	33%	58%	Not yet
Canada	-25%	26%	42%	Not yet

In the United States, on the ten year arc, "pet friendly hotel" is flat while "dog friendly hotel" has grown 72%, moving the ratio from 33% to 58%. Stripping the category noun sharpens the picture: comparing the bare terms, "pet friendly" fell 16 to 29% in all five markets between 2022 and 2025 while "dog friendly" held flat or grew in all five. The US bare term ratio has moved from 55% to 93% in a decade, which puts the US within reach of crossover on the current trajectory.

The United Kingdom is not an outlier, it is the finished state, with UK searchers using the dog term over the pet term at a ratio approaching seven to one. Every other English market is somewhere behind it on the same road, and the crossover events are datable: Ireland crossed in 2018, Australia in 2023, and within the US, beach searches crossed in 2024. Continental Europe never adopted the pet generic construction at all: German

and Dutch searchers use only the dog phrasing, and France and Italy settled on the dog word before the window opens.

Two qualifications. First, this is a finding for mature English speaking markets, not a global one: worldwide, "pet friendly hotel" search interest rose 28% between 2022 and 2025, driven by Spain, Brazil, Germany, and Italy importing "pet friendly" as an English loanword, a label that has already decayed at home. Second, Google Trends measures relative search interest, not absolute volume: every figure describes how terms move against each other.

3.2 The Counter Example That Proves the Point

The most instructive finding in the dataset is the one category moving the other way. In US residential lettings, "pet friendly apartments" holds steady while "dog friendly apartments" fell 26% between 2022 and 2025. Every hospitality and leisure category, from hotels and restaurants to beaches and holiday cottages, moves toward the dog word. The only category moving toward the pet word is the only one that is not hospitality.

The explanation is the argument. People genuinely do rent flats with cats, so in residential lettings the pet generic word is accurate, and an accurate word does not decay. In hospitality the travelling animal is overwhelmingly a dog, the word is inaccurate, and it is decaying. "Pet friendly" is surviving precisely where it is true and collapsing precisely where it is false.

3.3 What This Means for Your Marketing

The search data converts directly into a marketing instruction: market into dog friendly and away from pet friendly. A property that leads its listings and policy copy with "pet friendly" is optimising for a shrinking channel and telling the fastest growing guest segment that the property has not thought specifically about dogs.

The fix costs nothing. Lead with "dog friendly" and "dogs welcome" everywhere the guest reads, name dogs rather than pets in policy copy, and reserve pet generic language for the contexts where it is genuinely accurate, such as a property that truly serves cats. It is the cheapest revenue action in this paper.

3.4 The Generational Tailwind

The demand curve compounds with each cohort. Gen Z pet ownership grew 43.5% in one year and Gen Z households now represent 20% of pet owning households. The expectation this generation brings to travel is visible in the demand gap data: 27% of pet travellers want more dog friendly hotels and holiday parks, and 52% of pet owners stay exclusively at pet friendly properties.

The cost of that gap is now measured. A July 2026 survey of 2,000 American pet owners by Talker Research found that 45% had turned down a trip because it could not accommodate their pet, 41% named finding pet friendly accommodation as the hardest part of travelling

with one, and 70% said that leaving the pet at home shortens the trips they do take. Each of those is a booking a hotel did not get, or a night it did not sell.

Where the industry does not meet the demand, guests route around it. Twenty percent of guests admit to having smuggled a pet into a non pet friendly hotel room, and every smuggled dog is unmet demand absorbed as risk instead of revenue. The market is building over the gap too: Bark Air, an airline built for dogs, booked $12.4 million of revenue in its financial year to March 2026, two years after its first flight, and Tripadvisor reports bookings for dog welcome experiences up 260% year on year in its 2026 trend report. Demand this strong does not wait for hotels, it finds suppliers.

SECTION 4

The Revenue Mechanics

In plain terms, dog owners book more nights, pay more for them, and spend more while they are in the building. This section sets out the evidence for each of those three claims in turn, because each one is a separate line on the P&L: occupancy and demand, pricing power and ADR, and total revenue per available room. Each operates independently. Together, they compound.

4.1 Occupancy and Demand

The best measured evidence comes from short term rentals, where booking platforms hold the data hotels do not publish. KeyData's analysis of its managed rental portfolio found pet friendly properties running at 54% paid occupancy against 48% for the rest, with a 9% higher average daily rate and revenue per available night 24% higher. AirDNA's amenity analysis across its listing base found pet friendly listings earning $17.41 more a night and 5.4% more demand. Those are measured gaps from real bookings, and they are the figures this paper's revenue model is built on. Seventy eight percent of dog owners travel with their dogs annually.

The loyalty figures the industry quotes are older and softer. The claim that 76% of pet owners become repeat guests after a good stay, and that they stay 2.56 nights against 2.1 for everyone else, both trace back through Buhalis and Chan (2023) to two American trade magazine articles from 2004 and 2006, neither of which describes a survey or a sample. The industry loyalty benchmark of 30 to 40% they are usually set against has no traceable source at all. We report them because every operator will have heard them, and because the mechanism behind them is real (section 7.1), but we treat them as indicative and nothing in the revenue model depends on them.

Demand Metric	Measured Figure	Source
Occupancy, pet friendly vs not	54% vs 48%	KeyData, managed rental portfolio
Average daily rate premium	+9%, or $17.41 a night	KeyData; AirDNA
Demand premium	+5.4%	AirDNA
Revenue per available night	+24%	KeyData
Dog owners who travel with the dog	78%	Industry survey data
Repeat rate after a good stay	~76% (indicative)	Trade press, 2004, via Buhalis and Chan 2023
Average length of stay	2.56 vs 2.1 nights (indicative)	Trade press, 2006, via Buhalis and Chan 2023

The repeat rate is particularly significant. In an industry that spends enormous sums on loyalty programmes trying to push repeat business above 40%, properties that genuinely welcome dogs are achieving nearly double that by serving the whole family. The demand is also broadening across age demographics: nearly 25% of senior travellers and over 40% of middle aged travellers now travel with their pets.

Where the extra bookings come from matters, because a hotel has to do something to receive them. Dog owners do not browse the way other guests browse. They start from the filter, not the destination: the pet friendly tick box on the booking site, a dedicated dog travel site, or a search for "dog friendly hotel" in the city they are going to. A property that is not visible at that first step never enters the consideration set, however good it is. Then they read the policy page before the rooms page, and most of them phone to check it is real. So the lift in the table above is captured in three places: being listed and filterable wherever dog owners start, saying "dog friendly" in the words they search for (section 3), and publishing a policy that answers the question before the guest has to ask it (section 8). None of those costs money. The hotels in our dataset that score A are not spending more on distribution than the ones that score F. They are simply findable, and believable, by the guest who is looking.

The longer stay works the same way. A guest with a dog avoids the same day drive and the short hop, because every leg of a journey is harder with an animal, so they book fewer, longer trips. The longer stay is not something the hotel has to engineer. It arrives with the guest, as long as the hotel does nothing to send them home early.

4.2 Pricing Power and ADR

Dog friendly properties command a measurable ADR premium over comparable non pet listings. AirDNA's short term rental amenity data shows pet friendly listings earn $17.41 more in average daily rate and 5.4% more demand, a premium reaching $90 a night in New York and Boston, and hotels charging premium pet fees saw 6% higher ADR in 2025 versus non pet friendly competitors. The average pet fee across major US hotel brands is $76.01, representing approximately 24% of the average room rate. Seventy five percent of dog owners state they would pay more for accommodation that genuinely delivers on dog friendly claims. Sixty four percent would pay up to $50 more per night for a property with a verifiable, high grade dog friendly experience.

Brand	Average Pet Fee	Fee as % of Room Rate
Marriott	$121.82	30.59%
Hyatt	$105.00	28.40%
Hilton	$85.00	26.79%
IHG (Aggregated)	$60.00	19.87%

The willingness to pay is real but conditional: dog owners will pay premium rates when the experience justifies it, and they will not pay deterrent fees for a room and nothing else. The academic evidence now says the same thing with numbers attached. A 2025 study in the Journal of Hospitality and Tourism Insights found that pet centric facilities and services are what drive owners to accept a premium rate, while support for activities with the dog is what drives them to come back and recommend the hotel. A controlled choice experiment with 491 pet owners, published in Current Issues in Tourism, put prices on the pieces: owners were willing to pay an additional $146 for a pet lounge staffed by a dedicated pet manager and $117 for a play area, but placed a negative value, around $57, on in room amenity bundles of bowls, bedding and welcome gifts. Guests pay for people and places, not for a basket of goods left in the room. Section 8 documents how regulators have begun treating the difference between a fee that buys something and a fee that buys nothing as a legal matter rather than a commercial one.

4.3 TRevPAR and the Stay In Effect

The industry has repeated for years that dog owning guests spend about 30% more on property on food, beverage and spa. We used that figure in earlier editions of this paper and have since traced it: it comes from travel trade press and no study behind it could be found, so this edition no longer uses it in the revenue model. The mechanism it describes is real, though, and every operator who has run a dog friendly property recognises it. Call it the Stay In Effect: a guest travelling with a dog is more likely to eat at the hotel restaurant, order room service, use the hotel bar, and book spa services than to leave the property and spend money elsewhere, because leaving a dog alone in an unfamiliar hotel room is stressful for both the dog and the owner. The guest who feels their dog is welcome throughout the property stays on property; the guest whose dog is confined to the room spends elsewhere. The choice experiment in section 4.2 measures the same preference from the other side: owners pay for the places and people that let them stay in the building with the dog.

The size of that effect is the single most valuable number in this category that nobody has published. A hotel that tracks food and beverage revenue per occupied room night for dog guests against the rest of the house will have it within a quarter, and section 10 asks every programme owner to do exactly that. The margin profile is the other half of the argument. Industry reports claim that pet related services represent 5 to 8% of total hotel revenue but 25 to 30% of profit, and whatever the precise ratio, the logic holds: the guest is already in the room and the kitchen is already operating, so the incremental cost of serving a dog owning guest is a fraction of the incremental revenue they generate.

SECTION 5

The Ancillary Stack

The first edition of this paper treated ancillary revenue as a single 30% premium, a trade press figure this edition no longer relies on. That framing also understates the opportunity, because the premium is not one number. It is a stack of discrete, priceable products, each with its own margin profile, and most hotels have built none of them. The three that matter most are the canine menu, the dog walk, and retail.

5.1 The Canine Menu

Dog menu dishes are priced like human food and cost a fraction to make. Portions are small, typically 100 to 120 grams of protein, the ingredients are already in the walk in, and hands on preparation takes around three minutes. Across the global luxury and upscale segment, dog mains cluster into consistent price tiers:

Tier	Representative properties	Dog main price
Resort and casual	Hammock Beach, Fairmont Miramar, Omni Bedford Springs	$6 to $20
City upscale	Four Seasons Austin and Toronto, The Little Nell, Mandarin Oriental DC	$14 to $26
Luxury	Kimpton Vero Beach, Mandarin Oriental Paris, Cheval Blanc Paris, Virgin Hotels Shoreditch, The Dolder Grand	$26 to $58
Signature dishes	Peninsula Tokyo, The Chedi Andermatt, Kimpton Vero Beach	$47 to $75

The top of the market is higher than most operators assume. Kimpton Vero Beach, a resort on Florida's Treasure Coast rather than a palace, prices its Pampered Pets menu at $26 for ground beef or salmon, $28 for organic chicken, and $58 for an eight ounce filet of beef with gravy, served on china with a bottle of water. The Peninsula Tokyo sells a wagyu beef steak don for dogs at ¥11,000, about $75, and a dog club sandwich at ¥5,400. The Chedi Andermatt's raw venison and game bird plate is CHF 38, around $47, and The Dolder Grand in Zurich charges CHF 35 for beef with rice and vegetables. Mandarin Oriental Paris charges €28 for chopped steak, Cheval Blanc Paris €32 for its hand cut beef bowl, and Virgin Hotels Shoreditch £28 for a fillet steak on a full "Bone Appétit" menu with £6 dog cocktails. These are published, bookable menu items, drawn from the ninety hotel dog menus in Roch Dog's archive, and they set the ceiling; Bishop's Lodge, an Auberge resort in Santa Fe, tops the whole collection at $60 for carne asada. The lesson from the archive is that the price a dog dish will bear is set by the hotel's own menu, not by the category: a

dog filet priced like a human main at a $500 a night property sells, and the properties charging $8 for the same plate at the same tier are leaving the difference on the table. Price the dog's dinner to the room rate.

Against those prices, the Roch cost model, built on luxury kitchen procurement with three minutes of loaded line cook labour per plate and scaled to the portions on the Kimpton Vero Beach menu, produces the following margins:

Dish	Menu price	Food plus prep labour	Margin after food and prep labour
Organic chicken breast, 6 oz, with rice and vegetables	$28	$3.30	88%
Atlantic salmon, 4 oz, with rice and vegetables	$26	$3.55	86%
Ground beef, 4 oz, with rice and vegetables	$26	$2.40	91%
Filet of beef, 8 oz, with gravy	$58	$11.25	81%
Pupcake dessert	$9	$1.30	86%

This is a modelled estimate built from real menu prices and stated cost assumptions, not a hotel's disclosed profit and loss, and no operator publishes a dog menu margin. These are ingredient and prep margins, before kitchen overhead, delivery labour and waste, and the comparison to the human menu is made on the same basis: dog dishes run ingredient margins of 84 to 94% against the 65 to 72% typical of human dishes, on inventory the kitchen already stocks. The point is the relative gap, not a net profit claim. For context, CBRE's survey of US hotel financials puts the profit margin of the entire hotel food and beverage department at about 29%. Delivery and service charges then mirror or exceed human room service: Four Seasons Beverly Wilshire adds a 17% service charge, a 3.5% administrative fee, and a $7 per order pet delivery fee.

Three extensions widen the line further. The first is the event format: dog afternoon tea, an established product in the UK, priced from £6.95 at country properties to £35 at London luxury hotels, where Great Scotland Yard's dog tea sells out weeks in advance and is also sold as a £35 gift voucher. The second is retail: The Norfolk Arms generated £5,885 in ten months from a countertop canine treat display, 2,753 units sold, outperforming its human bar snacks by 164%. The third is sponsorship: premium pet food brands will fund the programme for access to the guest demographic, as in the Centara and Royal Canin partnership where the brand sponsors a complimentary in room pet minibar, taking the hotel's cost of goods to zero.

One discipline is non negotiable: hotel prepared dog dishes are treats, not diets, and must be presented as such, because veterinary guidance caps treat feeding at 10% of a dog's daily caloric intake. The toxic ingredient list (allium, xylitol, grapes, chocolate, macadamia,

cooked bones) must be engineered out at the recipe stage, and the menu should carry a disclaimer that dishes are complementary toppers, not a substitute for a complete and balanced primary diet. The properties doing this well treat the safety framework as part of the product. It is also the credibility moat: a menu built with a canine nutritionist is a marketing asset, and a menu built without one is a liability.

5.2 The Dog Walk

Cheval Blanc Paris is one of the finest dog friendly hotels in France. We assessed it personally, and it ranks A+ under our standard, the first hotel in the country to reach our highest grade. So when we asked about its dog walking service, we expected the best answer in the market. We were told the Majordomes can offer to walk a guest's dog around the Maison, for a maximum of fifteen minutes, free of charge.

Read that again. A palace hotel where suites run into the thousands of euros a night has correctly identified that its dog owning guests need a walking service, and then delivered the bare minimum dressed up as generosity. Fifteen minutes around the block is not a walk, it is a bathroom break. It pulls a butler off revenue producing work to deliver it. And it is free, at a property whose guests happily pay palace prices for everything else, with the Jardin des Tuileries five minutes from the front door. Run properly as a paid, structured service, dog walking at a property like that is comfortably worth another EUR 250,000 a year. The best dog friendly hotel in France is leaving six figures on the pavement outside its own front door. If they are missing it, so is almost everyone else: across more than 3,000 assessed hotels, the properties that have priced this service properly can be counted on one hand.

The walk deserves that price because it is the only guaranteed demand on the property. Every other ancillary competes for discretionary spend. The spa is optional, the minibar is optional, but a dog must be walked two or three times a day, at predictable hours, every day of the stay. An unwalked dog is a tax on every other revenue line: the guest walks the dog themselves, which removes them from the restaurant, the bar, and the spa several times a day, at exactly the wrong moments. And when the guest gives up on the hotel, they do not give up on the walk. They open a consumer app, book a stranger, and two hours later that stranger walks through the lobby to collect the dog. The hotel keeps none of the revenue and carries all of the optics of an unvetted contractor in its corridors.

Where hotels do sell walks, the prices are wrong in the downward direction. A Manhattan concierge arranging a 30 minute walk through a vetted provider commands $45, and Rover, the largest consumer walking app, lists its own averages at about $21 nationally and $24 in New York for a 30 minute walk, before the service fee it adds on top. Against that backdrop, five star properties sell in house walks at $10 and $15, and Cheval Blanc charges nothing. The correct anchor is not the apps but the hotel's own menu: a walk priced at 20 to 25% of the property's 50 minute massage reads as consistent with its positioning, while a walk priced below the room service tray fee tells the guest it is not valued, and a free fifteen minute walk tells the guest it is not a service at all.

The ladder that works has four rungs. An entry walk, 30 minutes, concierge arranged, at $35 to $50 in a Tier 1 American city, £30 to £45 in central London, €35 to €50 in Paris. A signature product at $100: a 90 minute structured walk by a dedicated, hotel employed walker in brand uniform, on a scouted route, with GPS tracking and photo updates sent mid walk, water and treats carried, and a proper handover on return. A premium version at $200 adding a wash and towel off, a fresh prepared meal, enrichment activities, and the same named walker for the whole stay. Then the closer: a bundle of ten signature walks at $800, which covers a four night stay at two walks a day with two to spare, banks $800 on the folio in one transaction, and guarantees the guest and the walker meet again and again. By checkout the dog has a person at the hotel, and guests do not rebook properties, they rebook relationships. Two hundred dollars for a dog walk sounds brave until you remember what it is: a 90 minute one to one experience with photo documentation and a wash, delivered by a trained member of staff. That is a spa treatment with a leash, priced below the massage in the hotel's own spa.

The staffing maths reduces to one number: walks per day. A walking position covered 350 days a year at eight walks a day delivers roughly 2,800 walks, and covering it honestly takes about 1.4 full time walkers once five day weeks, holidays and sickness are counted. Fully loaded, a walker costs $72,000 to $75,000 a year in New York, Los Angeles or San Francisco, about £46,000 in luxury London, and €37,000 to €44,000 in Paris or Berlin; for context, the US national median animal caretaker wage is $35,360 a year (Bureau of Labor Statistics, May 2025), so luxury market loaded costs run at roughly double the national median. At a blended rate of around $95 a walk, a walker covers their own cost at just over three walks per working day; build the case on a conservative five. Under three, stay concierge arranged with a vetted agency. Between three and five, watch the trend, because attach rates climb fast once the service appears in the pre arrival email. Above five sustained, hire. A fully covered Manhattan walking position delivering 2,800 walks a year generates $266,000 of revenue against roughly $105,000 of staffing cost: $161,000 of gross margin, around 60%, from one staffed position. No other guest facing role on the property returns sixty points of gross margin.

Scaled up, a 250 room urban luxury hotel at 70% occupancy, 10% dog room penetration, and a 30% walk attach rate, with buyers averaging two walks a day, sells roughly 3,800 walks a year: about $365,000 of direct walk revenue, netting around $200,000 after staffing and overheads, plus a modelled 12 to 15% lift in dinner checks from guests no longer bolting the main course to get back to the dog. A dog forward property that pushes penetration toward 20% and attach toward 40% through pre arrival selling and the check in bundle sells roughly 10,000 walks and clears $950,000 of direct revenue, netting north of $500,000. One legal note for US and UK operators: worker classification rules (AB5, IR35) make casual gig walkers a liability, so hire walkers as employees or contract an agency that employs them, never individual freelancers. Roch Dog's full operational treatment of this service line, including insurance, brand standards, and a 90 day launch plan, is published separately as The Million Dollar Mile (RDWP-DWM-01).

5.3 The Stack Compounds

Each product in the stack sells the next one, and the walk is the gateway. The guest who buys a walk on day one has trusted the hotel with their dog and opened a billing relationship with the pet concierge. By day three they are on the bundle. By departure they are asking about grooming, daycare, the in room dog menu, and the photo session. The walk creates the time window in which the long dinner happens, the menu extends the dinner the walk made possible, the retail display converts the goodwill into take home spend, and the gift voucher converts it into a second visit.

The compounding shows up in the property level metrics. Pet friendly properties already run fuller and at a higher rate than their neighbours in the booking data (section 4.1), and the loyalty the industry has always attributed to dog owners sits on top. Hotels running a complete walking and pet concierge operation report revenue per available room well above competitors across the street, with the same rooms, the same beds, and the same location. The stack is also self reinforcing on the demand side: every delivered walk, meal, and event generates reviews and social content in a category guests photograph compulsively, which feeds the bookings that feed the stack.

A property running the full stack is not operating a pet policy. It is running a canine hospitality operation with its own P&L, its own staffing logic, and its own loyalty flywheel, and the guest can tell the difference from the moment they book. That is the difference between the 49% of properties that fail assessment and the handful at the top of the league table in section 2: the failing properties treat dogs as a risk to be fee'd, while the leaders treat canine hospitality as a business, because it is one.

The stack also solves the measurement problem that keeps this category unmanaged. A hotel with a permission state pet policy has nothing to measure, so nothing improves. A hotel selling walks, meals, and retail has attach rates, per product revenue, and repeat purchase data on every dog owning guest, which means canine hospitality can be reviewed in the same monthly meeting as the spa and the restaurant, with the same accountability. What gets a line in the P&L gets managed. The revenue model in the next section shows what that line is worth.

SECTION 6

The Revenue Model

6.1 Per Property Economics

This section shows the arithmetic behind the $1.9 million figure, so an analyst can check every step and a general manager can take the total on trust. The model is a representative luxury hotel with characteristics aligned to the InterContinental portfolio: 250 rooms, $350 a night, 70% full. Change those three numbers to your own and the rest of the model scales with them. All assumptions are stated explicitly in the baseline profile below. Actual results will vary based on market conditions, local dog ownership density, demand elasticity, and execution quality.

Assumption	Value
Room count	250
Average daily rate (ADR)	$350
Baseline occupancy	70%
Occupied room nights per year	63,875
Baseline annual room revenue	$22,356,250

The incremental revenue calculation works as follows. A 5% occupancy lift applied to 250 rooms across 365 days produces 4,563 additional room nights per year. The 5% is deliberately below the measured gaps: KeyData's pet friendly rentals run six occupancy points ahead of the rest and AirDNA measures 5.4% more demand (section 4.1). At the baseline ADR of $350, those additional nights generate $1,597,050 in incremental room revenue. The second line is pricing power. AirDNA measures a $17.41 a night rate premium on pet friendly listings; applied to every dog occupied night in the model, the 6,388 nights at a 10% share of baseline occupancy plus the 4,563 incremental nights, that is $190,657 a year. Earlier editions put a 30% ancillary spend premium here instead; that figure could not be traced to a study, so it is out, and the Stay In Effect on food and beverage is left as upside the model does not count (section 4.3). Pet fee revenue is modelled per stay, not per night: at 2.56 nights per stay the incremental nights represent roughly 1,782 stays, producing $89,100 at a $50 fee.

Revenue Stream	Annual Incremental Value
Room Revenue (5% occupancy lift)	$1,597,050
Rate Premium ($17.41 a night on 10,951 dog occupied nights)	$190,657
Pet Fee Revenue ($50 per stay)	$89,100
Total Incremental Revenue	$1,876,807

This model assumes that the occupancy lift represents net new demand rather than cannibalisation from other segments. In practice, some portion of the lift may come from competitive displacement rather than market expansion. The model also assumes consistent demand across seasons, which will not hold in all markets. Properties in leisure destinations may see concentrated dog travel demand during specific periods, while urban business hotels may experience more even distribution.

6.2 The Product Stack on Top

The base case captures the demand side effects of a credible programme: more bookings, longer stays, higher ancillary capture. The product stack in section 5 adds discrete revenue lines on top of it. For the same 250 room archetype:

Product Line	Assumption	Annual Revenue Potential
Dog walking	10 to 20% dog occupancy, 30 to 40% attach	$90,000 to $950,000 direct
Canine menu	Dog occupancy attach at the Kimpton Vero Beach price points	$60,000 to $180,000 (estimate)
Retail and events	Treat display, take home, teas and events	$10,000 to $40,000 (estimate)

The base case counts no ancillary spend at all, only rooms, rate and the fee, so these lines are where the on property spend comes in. The rule for reading them is still simple: they are estimates, not measurements, and they should be added with care. A property hitting the staffed walking tiers is netting $200,000 to $500,000 from walking alone, which is why a fully built operation lands well above the base case model. The walking range runs from a modest concierge arranged programme at entry pricing to the mature dog forward case modelled in section 5.2. The menu and retail figures are Roch model estimates built from published price points and observed attach behaviour, since no operator discloses product level dog revenue.

6.3 Portfolio Scale Impact

Applied across the 21 InterContinental properties that scored D, F, or failed to meet the standard, the base case model implies approximately $39 million in unrealised annual revenue across just the underperforming portion of a single brand's portfolio sample. Comparable underperformance appears across the 2026 brand league sample: 26 of 32 assessed Hyatt properties graded D or F, as did 7 of 10 Hiltons, 7 of 7 Sofitels, 5 of 6 Sheratons, and 6 of 6 Marriott branded hotels. These are flagship skewed samples, not brand systems, as section 2.4 sets out.

These figures should be read as directional rather than precise. The portfolio scale projection applies the same base case assumptions uniformly across properties with different markets, ADRs, and demand profiles. The actual aggregate opportunity will vary.

6.4 Sensitivity Analysis

Revenue projections for the same 250 room, $350 ADR property vary based on the degree of occupancy lift achieved and fee structure. The table below models five scenarios.

Scenario	Occupancy Lift	Pet Fee (per stay)	Total Incremental Revenue
Conservative	3%	$50	$1,170,684
Base Case	5%	$50	$1,876,807
Mid Range	5%	$100	$1,965,907
Upper Range	7%	$100	$2,707,730
Optimised	7%	$150	$2,832,480

Even the conservative scenario, a 3% occupancy lift with a $50 fee, produces $1.1 million in incremental annual revenue for this property archetype. Smaller properties at lower ADRs will see proportionally lower absolute figures. A 150 room property at $250 ADR with a 3% occupancy lift produces approximately $490,000. Across property types, the demand effects alone are worth approximately $500,000 to $3 million per property, and the full product stack takes the top of the range past $4 million, though individual results will depend heavily on market conditions, demand density, and execution quality.

SECTION 7

Behavioural Economics of the Dog Traveller

This is the why behind the numbers in sections 4 to 6, and it matters because it tells you which changes actually move them. Three habits distinguish dog owning travellers from conventional guests: they do not switch once they have found a hotel that works, they spend where the dog is allowed to be, and they do not believe a label until someone has checked it.

7.1 Switching Cost and Loyalty Lock

The repeat rate, whatever its exact level, reflects switching cost, not general satisfaction. Finding a genuinely dog friendly hotel is difficult. A traveller who identifies a property that welcomes their dog without friction has made an investment in discovery that they will not willingly repeat. The emotional cost of arriving at a new property and discovering restrictions is high enough to make the known quantity overwhelmingly preferable. Dog owning guests are not more loyal by disposition, they are more loyal because the cost of disloyalty is too high.

The implication for operators is that a single positive experience creates a disproportionate return. Every dog owning guest who checks out satisfied represents not one booking but a recurring revenue stream.

The discovery cost is real enough that a whole category of specialist booking sites exists to reduce it. A University of Surrey study of 697 people who had travelled with their dogs found that the decision to use a dog specific booking site rather than a mainstream one is driven by trust in the institution and by the owner's own appetite for risk, not by how experienced a traveller they are. Owners who have been burned once go looking for a source they can believe, and expertise does not cure the problem. Only reliable information does.

7.2 The Shared Space Multiplier

A property that restricts dogs to the room forfeits the ancillary spend premium. A property that allows dogs in at least one indoor shared space immediately raises its food and beverage capture rate.

A guest whose dog is confined to the room cannot use the lobby bar, cannot eat in the restaurant, and is functionally segregated from the core hotel experience. The money does not disappear, it goes to the restaurant down the street or the competing hotel that lets the guest sit in the lobby with their dog. This is a revenue mechanism, not a philosophical position about animal inclusion. As one hotel consultant with direct experience across multiple luxury properties observed: "If dogs are not allowed in restaurants, there is nowhere for them to go and no one responsible for them."

The choice experiment in section 4.2 is the controlled version of the same finding. The attributes owners paid the most for were a pet lounge with a pet manager, a play area, and a restaurant they could use with the dog: shared spaces and staff, all of them outside the room. The attribute they refused to pay for was the one most hotels lead with, a bundle of amenities inside it. Owners are telling hotels where the value is, and it is not in the welcome basket.

7.3 The Trust Premium

The majority of dog owning guests do not trust the pet friendly label on booking platforms. They phone hotels directly to confirm whether dogs are actually welcome, what restrictions apply, and whether specific areas are accessible. This is rational behaviour in the absence of reliable information. Policies change depending on who is at the desk. A guest told dogs were welcome in the restaurant arrives to find the evening shift disagrees. Roch Dog's companion paper Nobody Trusts Pet Friendly documents this trust collapse in detail through guest reviews and booking behaviour.

Verified, graded assessment provides the trust signal that the label "pet friendly" no longer carries. As one marketing manager at a luxury property put it: "We know that we are the best dog friendly hotel in our area, but until we became certified we couldn't prove it."

The trust premium is commercial. Properties that can demonstrate verified quality attract the bookings that uncertain properties lose. High booking abandonment rates from policy inconsistency represent a quantifiable revenue leak that structured assessment directly addresses, whether through certification, brand standards, or other verification mechanisms.

The practical test for any property is simple. If guests phone the front desk to ask whether the policy on the website is real, the hotel is paying the trust deficit twice: once in staff time answering the calls, and again in the bookings that never call and simply go elsewhere. Verified status removes the phone call, and with it the abandonment that happens when nobody picks up.

SECTION 8

Why Hotels Fail

8.1 The Language Problem

The hotel industry uses three tiers of language to describe its relationship with dogs. Each tier carries different economic implications.

Tier	Language Example	Economic Intent	Reliability
Acceptance	"Pets Allowed"	Contractual permission; liability focus	Low
Marketing	"Pet Friendly"	Positioning; lifestyle appeal	Variable
Hospitality	"Dog Friendly" / "Dogs Welcome"	Operational commitment; revenue focus	High

Only the third tier consistently produces the revenue outcomes documented in this paper. The term "pet friendly" has no standard definition, no regulatory framework, and no verification mechanism in global hospitality. Only 10 to 15% of hotels using the term actually accept cats, making the label inaccurate before it is even vague. As the Dog Friendly Hotel Association stated: "For years the sector has relied on the phrase pet-friendly but without shared definitions it has come to mean very different things from one property to the next."

Roch Dog's companion study Pet Friendly Doesn't Translate examined this language across 20 languages and 56 countries and found the same three tier pattern in every one: a legalistic acceptance tier, a borrowed "pet friendly" marketing tier defined by nobody, and a dog specific hospitality tier where the genuine operational commitment lives. The gap between the marketing tier and the hospitality tier is the same in Japanese, Polish, and Portuguese as it is in English. The label failure is structural and global, and the search data in section 3 shows guests independently abandoning the term wherever a dog specific alternative exists.

8.2 Policy Friction as a Revenue Killer

Arbitrary weight limits are the most common structural failure. A 25 pound limit excludes Labradors, Golden Retrievers, German Shepherds, Border Collies, and the vast majority of mixed breed dogs, the most common family dogs in Western markets. It is a demographic exclusion policy that eliminates much of the addressable market.

Deterrent pricing follows the same logic. A $250 pet fee with no services attached is a mechanism to discourage bookings, and the properties charging the highest fees in the InterContinental portfolio generated the lowest scores. The fee funds nothing, which is rational if you view dogs as a liability, but it is entirely inconsistent with the revenue data.

The pet policy document itself is where most of this friction lives, and Roch Dog's companion study The Fine Print read 236 of them from 29 countries. Nine in ten contain more prohibitions than courtesies; the typical policy forbids six things and offers fewer than two, and only one in five mentions a water bowl. Many contain a trap nobody intended: they close the restaurant and bar to dogs and then forbid leaving the dog alone in the room, so a guest travelling alone with a dog cannot eat dinner in the hotel. The legal drafting that makes these documents so unwelcoming, the waivers, indemnities and fines, was reviewed by counsel in four countries and found to be somewhere between weak and worthless, while the few things the law reliably backs are short, reasonable and what a good host would say anyway. The policy is risk theatre: it performs a protection the hotel largely does not get, and it costs bookings from the most loyal segment in the business.

8.3 The Regulatory Squeeze on Fees

Deterrent and hidden pet fees are no longer merely a commercial mistake. In the United States they have become a compliance exposure.

The Federal Trade Commission's Rule on Unfair or Deceptive Fees (16 CFR Part 464), effective 12 May 2025, applies directly to short term lodging. It requires the total price including all mandatory fees to be displayed upfront as the first and most prominent price, prohibits drip pricing, and bans vague labels such as "service fee." A non negotiable pet fee or pet cleaning fee charged to a guest who has booked as a pet owner is a mandatory fee under the rule's definition, which means the era of the pet fee discovered at check in, or buried in a taxes and fees line, is legally over in the US market.

State enforcement had already been moving. The Texas Attorney General has secured settlements or agreements over hidden hotel fees with Hyatt ($1.25 million, December 2025, the sixth such settlement), Booking.com ($9.5 million), Marriott, Omni, Choice Hotels, and Hilton, under deceptive trade practices law, specifically targeting rooms marketed at prices unavailable because mandatory fees were added at checkout. The direction of travel is the same in Europe. In the United Kingdom the Digital Markets, Competition and Consumers Act banned drip pricing from 6 April 2025: the headline price must include every charge the guest will necessarily pay, and the Competition and Markets Authority can now fine a business directly, up to GBP 300,000 or 10% of worldwide turnover, without going to court. EU consumer law treats mandatory fees omitted from the headline price the same way. Fee transparency is becoming the norm across every major Western market, not an American quirk.

For operators the implication is straightforward and consistent with the economics: a pet fee must be disclosed upfront and should correspond to a service the guest can see. Properties whose pet fee funds a visible canine hospitality programme have nothing to change. Properties using the fee as a hidden deterrent now carry regulatory risk on top of the revenue they were already losing.

8.4 Operational Failure Modes

Hotels that have not invested in dog friendly programming experience predictable failure modes, and every one of them costs money in a way the hotel never sees on a report. Dogs are left unattended during breakfast because there is nowhere for them to go, which means the owner eats fast, skips the second coffee and does not book dinner. Staff interpret vague policies in real time because no written policy exists, so the morning shift says dogs are welcome in the restaurant and the evening shift disagrees, and the guest who was told yes at check in is told no at seven o'clock in front of other diners. The front desk does not know whether the fee is per night or per stay, quotes both, and the guest disputes the folio at checkout. Housekeeping was not told the room had a dog in it and is surprised, or was told and refuses to enter. Nobody knows where the nearest emergency vet is. The bowls are paper. The welcome amenity is a bag of treats the dog cannot eat.

None of these are failures of budget. They are failures of ownership. In almost every hotel we assess, the dog policy belongs to no one: it was written by the insurer or the brand legal team, enforced by whoever is on shift, and reviewed never. The single cheapest fix in this paper is to give it to someone. A programme owner, usually a front office or guest relations manager with a few hours a month, who writes the policy down, briefs every shift on it, checks that housekeeping and food and beverage know the rules, and owns the number. Once a person owns the number, the failures above stop being invisible, because they show up in that person's results. This is the operational reality behind the label, and the point at which a pet policy becomes a canine hospitality programme.

8.5 The Award Scheme Problem

Existing pet friendly hotel awards often reinforce the problem. TripAdvisor's 2024 number one pet friendly hotel scored 10 out of 52 points under the assessment framework then in use, a C grade, with dogs banned from the bar, restaurant, and all public areas. InterContinental Miami, scoring A+ at the time, featured in neither major award programme. Awards that measure popularity without verification provide a weak signal in a category defined by inconsistency.

SECTION 9

Where This Breaks

The economic case presented in this paper is strong in aggregate, but it is not without constraints. Operators and investors should understand where the thesis applies cleanly and where it requires adaptation.

9.1 Luxury Urban vs Resort Properties

The revenue model is calibrated to urban luxury hotels with consistent year round demand. Resort properties face different dynamics: concentrated seasonal demand, higher outdoor exposure, and guest populations that may include a larger proportion of families with children or guests with specific expectations about the resort environment. The shared space multiplier operates differently in a resort setting where outdoor spaces are the primary amenity.

9.2 Cultural Resistance Markets

Dog friendly hospitality is not culturally universal. Parts of Asia, the Middle East, and North Africa have cultural or religious frameworks where the presence of dogs in shared public spaces is not straightforward. The APAC growth figures cited in this paper are driven primarily by Japan, South Korea, and Australia. Operators expanding into culturally sensitive markets will need to adapt the model rather than apply it directly.

9.3 Allergy and Sensitivity Concerns

Properties serving a significant proportion of allergy sensitive guests face a legitimate operational trade off. The solution in most high performing properties is zoning, dedicated dog friendly rooms and floors, separate from allergy friendly areas, rather than whole property integration. This adds operational complexity and may reduce the revenue uplift in properties where zoning limits the shared space multiplier.

Zoning also addresses the demand side risk. A property that integrates dogs with no dedicated floors or areas risks displacing allergy sensitive, dog averse, and quiet seeking corporate guests, and the occupancy lift in section 6 should always be read net of that effect. The high performing properties in the dataset run zoned operations precisely because zoning lets them capture the dog demand without spending the non dog demand to get it.

9.4 Food and Beverage Complexity

Allowing dogs in food and beverage areas introduces genuine operational considerations: hygiene protocols, furniture protection, staff training, and the experience of non dog guests. These are solvable problems, as demonstrated by the high performing properties in the dataset, but they are not trivial. Properties that skip the operational groundwork and simply open the restaurant to dogs without preparation will create guest experience failures that undermine the economic case. The canine menu adds its own discipline: health codes bar dogs from food preparation areas, so service happens in rooms and outdoor spaces, and recipes must be engineered around the canine toxic ingredient list rather than adapted casually from the human menu.

9.5 Execution Risk

The revenue model assumes competent execution. A poorly implemented dog friendly programme, one that adds dogs without adding the operational infrastructure to support them, will not capture the revenue premiums described in this paper and may actively damage the non dog guest experience. The difference between a programme that generates $2 million in incremental revenue and one that generates complaints is not budget, it is operational commitment.

9.6 Data Limitations

The Roch Dog Assessment Dataset is the largest structured evaluation of dog friendly hotel performance available, but it carries limitations. It has not been externally audited. It is skewed toward English speaking and European markets. Assessment criteria are defined by a single organisation. While the framework has been applied consistently across more than 3,000 properties, the dataset should be understood as the most comprehensive available rather than definitively representative.

SECTION 10

The Minimum Viable Programme

The gap between a failing property and a functional one is not primarily about budget, it is about a set of operational decisions that most properties can implement within 30 to 90 days. Based on the patterns observed across the dataset, the following represent the minimum non negotiable elements of a canine hospitality programme that captures meaningful revenue.

1. Remove arbitrary weight limits. A 25 pound limit excludes the majority of family dogs. If the property can accommodate a dog, it can accommodate a Labrador.

2. Provide shared space access. Dogs must be allowed in at least one indoor shared space, a lobby area, a bar, a lounge, or a terrace. Without this, the on property spend goes to the restaurant down the street.

3. Publish a written policy. The policy must be clear, publicly available, and consistently enforced across all shifts. Staff discretion on pet policy creates the inconsistency that drives booking abandonment.

4. Assign a programme owner. One person on staff must own the canine hospitality programme. When the head of cleaning is managing dog policy by default, the programme fails. The owner's first job is to measure: food and beverage revenue per occupied room night for dog guests against the rest of the house, their repeat rate, and their length of stay. Nobody in the industry publishes those numbers. A hotel that has them knows exactly what its dog guests are worth.

5. Provide basic amenities. Real food and water bowls, not disposable plastic. A dog bed in the room. These are low cost signals that the property takes dog guests seriously. They are the floor, not the programme: a 2024 study in the International Journal of Hospitality Management found that when the practical basics are in place, guests respond well whether or not the hotel adds indulgences on top, and when the basics are missing, no amount of indulgence rescues the stay. Get the bowls right before the pupcakes.

6. Set pricing that reflects value. A fee is acceptable. A deterrent is not. The fee should correspond to a service level that the guest can see and experience, and under current US regulation it must be disclosed upfront in the headline price.

These six elements do not require significant capital. They require a decision. Beyond them sits the product stack described in section 5, the canine menu, the walking service, and retail, which is where a compliant programme becomes a profitable one. The next section puts every decision in this paper in order, with what each costs and what it is worth.

SECTION 11

The Money, In Order

Everything in this paper reduces to a short list of decisions, and they are not equal. Some cost nothing and pay immediately. Some need a hire. This is the order a general manager should take them in, with what each is worth to the 250 room archetype in section 6. The values are the paper's own estimates and scale with the property; the order does not.

1. Change the words. Cost: nothing. Worth: the top of the funnel. Replace "pet friendly" with "dog friendly" and "dogs welcome" on the website, the booking site listings and the policy page. Section 3 shows guests in every mature market searching for the dog word, and British guests searching for it seven to one. A property leading with the pet word is invisible to the fastest growing segment it has, and the fix is a find and replace.

2. Rewrite the policy page. Cost: an afternoon. Worth: the bookings that currently abandon. Lead with what the dog gets and where it can go, state the fee in one line, delete the weight limit and the waivers. The policy is the one page every dog owner reads before booking, and most hotels wrote it for their insurer (section 8.2). A guest who has to phone to find out whether the policy is real is, more often than not, a guest who does not phone.

3. Price the fee as a service and put it in the headline price. Cost: nothing. Worth: about $89,000 a year at $50 a stay, and a regulatory risk removed. A fee that funds a visible programme is accepted without complaint. A $250 fee for a room and nothing else is a deterrent, and since May 2025 in the United States and April 2025 in the United Kingdom it is a legal exposure if it is not disclosed up front (section 8.3).

4. Open one indoor shared space to dogs. Cost: a hygiene protocol and a staff briefing. Worth: the on property spend the base case leaves uncounted. The owner whose dog can sit in the bar or the lounge eats and drinks at the hotel. The owner whose dog is confined to the room eats elsewhere. The choice experiment in section 4.2 shows that shared space with staff is the thing owners will pay more for, and section 9 covers how the best properties zone it so the non dog guest is never affected.

5. Put real bowls and a bed in the room, and give the programme an owner. Cost: $15,000 to $30,000 one off. Worth: the repeat rate. These are the floor that the academic evidence says must be in place before anything else counts (section 10), and the return visit depends on the first stay going right. The owner is a person, not a budget: a few hours a month from a front office or guest relations manager who writes the rules down, briefs every shift and owns the number.

6. Sell the walk. Cost: a vetted agency to start, a hire once demand proves it. Worth: around $90,000 a year concierge arranged, $365,000 to $950,000 staffed. The only guaranteed demand on the property, currently given away free or sold at $10. Section 5.2 sets out the four rung price ladder from a $35 entry walk to a $200 signature experience and an $800

bundle, and the hiring maths: a staffed walking position returns about 60 points of gross margin, which no other guest facing role on the property does.

7. Put a dog menu on room service, and price it to the room rate. Cost: a canine nutritionist's afternoon and recipes built from stock already in the walk in. Worth: $60,000 to $180,000 a year. Dog dishes are priced like human food, cost a fraction to make, run 80% plus ingredient margins, and carry the same delivery and service charges as the tray beside them. Kimpton Vero Beach charges $58 for a dog's filet and the Peninsula Tokyo about $75 for wagyu; a luxury property charging $10 for a steak bowl is the one leaving money behind (section 5.1).

8. Retail and events. Cost: a countertop display. Worth: $10,000 to $40,000 a year. Treats at the desk, a dog afternoon tea, a gift voucher that brings the guest back. One country pub sold GBP 5,885 of dog treats from a counter display in ten months and outsold its own bar snacks.

9. Get assessed. Cost: nothing, certification is free. Worth: the trust premium. A verified grade removes the phone call and the abandonment that goes with it (section 7.3), gives the marketing team a claim it can prove, and gives the owner a benchmark against the hotel across the street. It also tells the market, in a category where nobody trusts the label, that this property is the exception.

Steps one to five are the minimum viable programme in section 10. They cost under $50,000 all in, they move a property from the 49% that fail to a credible B, and they capture the demand side of the model: the extra bookings, the longer stays and the ancillary premium that make up the $1.9 million base case. Steps six to eight are the product stack that turns a compliant programme into a profit centre with its own line in the P&L. Step nine is how the market finds out.

SECTION 12

Regional Opportunity

The economics documented in this paper play out differently by region, and so does the maturity of the infrastructure serving them. Roch Dog's companion study Pet Friendly Doesn't Translate mapped the language and market structure of dog friendly hospitality across 20 languages; the commercial picture below draws on that work and on the market data assembled for this paper.

12.1 North America

North America holds approximately 42% of the global dog friendly hotel market share. The United States has 71 million dog owning households and the term "pet travel" is searched more than 19 million times annually. Canada now has nearly four times more pets than children under 18. The demand language data places both markets on the same migration curve as the UK, with the US bare term ratio at 93% of crossover, and US beach searches already crossed to the dog word in 2024. North America is also where the regulatory squeeze is sharpest: the FTC Junk Fee Rule and state enforcement now govern how every pet fee on the continent is disclosed. The combination of the largest demand base, the fastest converging search language, and active fee regulation makes North America the region where the gap between demand and delivery is most expensive to ignore.

12.2 The United Kingdom and Ireland

British dog owners were already spending GBP 3 billion a year on pet holiday accommodation in 2017, and the habit has only deepened: Direct Line's August 2026 survey of 2,000 pet owners found that 62% now take the pet on holiday with them, two in five of them into pet friendly accommodation, spending about GBP 57 a day on the animal while away. The UK is the finished state of the demand language shift, with dog friendly search interest running at up to seven times the pet generic term. Northern Ireland has the highest dog ownership rate in the UK, and the DINKWAD demographic prioritises the dog's inclusion over room price. The UK is also the most productised canine hospitality market in the English speaking world: dog afternoon teas, dog menus, and dedicated dog packages are established commercial categories, and specialist trade commentary now routinely distinguishes "pets allowed", "pet friendly", and "dog friendly" as three different levels of commitment. What the market lacks is a shared floor: properties of vastly different operational commitment trade under the same labels.

12.3 Continental Europe

Continental Europe is the largest pet owning region in the world by households: the European pet food federation FEDIAF counts 306 million pets in 140 million homes, 49% of all European households, in its 2026 figures. It never adopted the pet generic construction in the first place, and its leading markets have built dog specific infrastructure instead. The DACH region is the most mature dog travel ecosystem in Europe: Hundehotels and Urlaub mit Hund operate as established product categories rather than marketing phrases, supported by dedicated platforms and annual awards that function as de facto quality tiers. France has pioneered voluntary certification through the QUALIDOG label, which grades properties from one to four truffles, proof that the market wants granular differentiation, though a one truffle and a four truffle property still carry the same label. Spain's Law 7/2023 recognises animals as sentient beings, requires liability insurance and training, and imposes fines up to EUR 200,000, turning the gap between marketed and delivered pet friendliness into a legal liability. Poland has the highest per capita dog ownership in Europe at 22.9%, roughly 8.4 million dogs, with a richly developed native vocabulary and hundreds of properties under dog friendly filters. The European picture is a patchwork of mature demand, partial standards, and rising regulation, with no single framework connecting them.

12.4 Asia Pacific

Asia Pacific is the fastest growing region at 10.29% CAGR through 2031, and its three lead markets are each instructive. Japan has the most precisely tiered dog travel language in the world and a hospitality culture that has rethought the category from first principles: dog friendly onsen ryokan provide dedicated dog bathing areas, private hot spring pools where dogs accompany their owners, and scheduled access to communal spaces, demonstrating that operational rigour and inclusion are the same force, not opposing ones. South Korea is undergoing the Petfam demographic shift, with average monthly pet spending around KRW 194,000 ($142), a figure the Kyung Hee choice experiment in section 4.2 independently reproduced among its own respondents at KRW 205,000, pet friendly hotel bookings growing 30% year on year, and six star hotels competing through dog wine, pet mattresses, and curated packages as companion animals effectively replace children in urban households. Australia crossed the demand language threshold in 2023 and now searches dog first. China is the strategic wildcard: no native dog friendly vocabulary has yet stabilised, the trade press is actively discussing productisation and standardisation, and the market is searching for structure rather than defending incumbent labels. Whoever defines the standard terminology in China fills a vacuum rather than fighting an incumbent, and that window is closing as domestic platforms establish informal conventions.

12.5 The Gulf

The Arabic speaking market is emerging, high value, and concentrated almost entirely in the Gulf, where wealth, expatriate demand, and regulatory modernisation converge. Abu Dhabi's 2025 regulations formally allow pets in tourist facilities for the first time, and Dubai's luxury properties market dog acceptance prominently to Western expatriates and tourists, typically with strict operational boundaries. Marketing copy across the region deliberately avoids naming dogs, reflecting cultural sensitivities that vary across the Arabic speaking world. The Gulf opportunity is real but narrow: it rewards operators who understand that inclusion here is delivered through carefully zoned operations and precise communication rather than whole property integration.

12.6 Latin America

Brazil is home to over 168 million registered pets, trailing only China and the United States, with a pet industry worth over $9 billion annually and a pet food segment projected to reach $14 billion by late 2026. Its consumer base is highly digitised, with 40.6% of online pet revenue flowing through e commerce, and "pet friendly" is deeply naturalised in Brazilian hospitality discourse as a mainstream revenue strategy. Yet weight limits as low as 5 kilograms remain common, excluding virtually all medium and large breed dogs, and the demand language data shows Brazil and Spain importing the English "pet friendly" label at speed, a decade behind the UK on the trust curve. That timing is the opportunity: the window to establish verified, dog specific standards in Latin America and Southern Europe is open now, before the label degrades locally the way it already has in English speaking markets. The commercial enthusiasm is present, the verification is absent, and the properties that move beyond token accommodation face little contest.

SECTION 13

Investment and Payback

The investment is small, and it is worth being honest about how small, because inflated cost estimates are one of the reasons this category stays unmanaged. A dog friendly programme does not need special equipment. Rooms are cleaned the way rooms are cleaned. A room that had a dog in it takes a little longer on departure and gets a deeper clean on a schedule, and that is a housekeeping line, not a capital project. The figures below are for the same 250 room archetype as the revenue model.

Investment Category	Cost Range (Est.)
Amenities (beds, real bowls, treats, bags, opening stock)	$10,000 to $20,000
Staff training, policy rewrite, programme owner time	$5,000 to $10,000
Marketing, signage, website and listing changes, verification	$10,000 to $20,000
Total one off investment	$25,000 to $50,000
Year One Revenue Multiple (base case $1.88 million)	38x to 75x
Operating Return (at ~50% flow through)	Roughly 19x to 38x

Running costs are modest. Extra housekeeping time on dog rooms, around 20 minutes per departure, comes to roughly $1,500 to $2,000 a month at 10% dog room penetration. Amenity replenishment runs about $500. An allowance for the occasional damage claim or insurance adjustment adds a few hundred dollars more. Call it $3,000 a month, recovered in well under a day of incremental revenue at the base case rate. The housekeeping line is the one not to trim. A 2026 study in the Journal of Travel and Tourism Marketing ran 13,604 TripAdvisor reviews of pet friendly hotels through machine learning and found that cleanliness works as a threshold: it outweighs value for money, and a hotel that fails it is not considered at any price. The reviews that reassure prospective guests are the ones that mention a clean room, because they remove the worry that a dog slept in the bed last night. Twenty minutes of extra housekeeping is what buys that review. The ancillary product stack requires almost no additional capital: the canine menu runs on existing kitchen inventory, the treat display is a countertop fixture, and the walking service in its outsourced form is a negotiated partnership rather than a hire.

For context, a standard hotel room renovation costs $15,000 to $30,000 per room. A food and beverage outlet upgrade runs $500,000 to $2 million. A canine hospitality programme costs about the same as renovating two rooms and, under the base case model, delivers $1.9

million in annual incremental revenue. Measured properly, on operating profit rather than revenue, nothing else a hotel can buy for $50,000 returns its capital twenty times over in the first year. The constraint on this category has never been capital. It is the decision.

The most common objection to structured dog friendly programmes is the perceived operational downside: hygiene concerns, property damage, guest complaints. Hotels that expect dogs and build operational protocols around their presence generally maintain better hygiene outcomes than hotels that are ambushed by unauthorised pets. Every hotel of scale has guests who smuggle dogs into rooms regardless of policy, one in five guests by their own admission. The difference is that a property with professional protocols handles this as routine maintenance. A property without them discovers the problem after checkout and absorbs the cost without any offsetting revenue.

SECTION 14

The Case for a Global Standard

Every finding in this paper converges on one structural conclusion: the category has no floor.

"Pet friendly" is broken as a signal. Half the hotels wearing the label fail structured assessment. The best portfolio average among the world's major luxury brands in our sample is a B, and no brand has closed its own internal spread: InterContinental spans 57 points, Fairmont spans 48. Guests have stopped believing the label, phoning properties to verify what the listing claims, and the search data shows them abandoning the word itself in every market where a dog specific alternative exists. The label decays precisely where it is inaccurate, and in hospitality it is almost always inaccurate.

This is not an English language problem. Across 20 languages and 56 countries, the same three tier pattern repeats: a legalistic acceptance tier, an undefined "pet friendly" marketing tier, and a dog specific hospitality tier where the real commitment lives. Partial fixes already exist and prove the demand for structure: France's QUALIDOG truffles, the DACH award ecosystems, Japan's rule dense precision. But every one of them is voluntary, national, and multi tier, which means a minimally compliant property and an exceptional one can still carry the same badge. None provides what every other dimension of hospitality quality already has: a binary, verifiable floor beneath which a property cannot claim the label.

Regulation is starting to impose that floor from the outside, fee first: the FTC now governs how pet fees are disclosed in the US, Texas has extracted eight figure settlements over hidden fees, and Spain fines misleading operators up to EUR 200,000. The industry can wait to have its category defined by regulators, market by market, penalty by penalty, or it can define the category itself.

The economic argument for a single global standard is the argument of this entire paper. A standard converts the trust premium from an individual property's discovery problem into a market signal. It lets the excellent independent compete with the flagship on verified performance rather than brand size. It gives brands the internal benchmark their 57 and 48 point spreads prove they need. And it does for canine hospitality what star ratings did for rooms and inspection did for kitchens: it makes quality legible, comparable, and priceable. The window matters too. Spain, Brazil, and China are defining their dog travel vocabulary right now. A standard established there today fills a vacuum; a decade from now it must displace a decayed label and the mistrust that comes with it.

The measurement infrastructure now exists: certification is free for every hotel, every property is assessed and graded A+ to F whether or not it pays, and a grade cannot be bought. However the industry's floor is ultimately set, the properties that adopt measurable canine hospitality standards first will capture the revenue documented in this paper while their competitors are still arguing about the label.

SECTION 15

Implications

For Hotel Owners and Asset Managers

Canine hospitality is a revenue lever returning roughly 19 to 38 times its investment in year one operating profit under the base case model, with conservative incremental revenue of $500,000 to $4 million per property depending on scale, market, and execution, the top of that range reached with the full product stack. Revenue impact builds over the first 6 to 12 months as bookings, reviews, and return visits accumulate, but the annualised economics place this among the highest return categories available to hotel operators. The product stack, menu, walking, retail, is where the margin concentrates, and it is buildable in a quarter. The question for individual properties is whether their market conditions and operational capacity support the investment.

For Brand Leadership

The variation documented in the InterContinental and Fairmont studies is a brand consistency risk. Spreads of 57 and 48 points within single luxury portfolio samples mean the brand name provides no reliable signal of quality in this category. The Kimpton comparison demonstrates that the operational knowledge to fix this already exists inside the major groups. What is missing is the decision to extend it. The demand language data adds urgency: guests in every mature market are searching for this category in words most brand marketing does not use.

For REITs and Investors

US RevPAR is forecast to grow 4.4% in 2026, most of it from rate rather than from new demand, with occupancy barely moving at 63.1% (CoStar and Tourism Economics, August 2026). In that environment canine hospitality represents one of the few genuine demand levers available, with documented spending patterns that outperform conventional guest segments. Pet friendly properties command measured occupancy and rate premiums in the booking data, with on property spend and loyalty on top. The risk adjusted return profile is attractive: low investment, documented returns, and a growing market at 12.2% CAGR with a generational spending tailwind behind it. The portfolio scale opportunity is large enough to be material at the asset level.

For the Industry

The hotel industry has applied measurable quality standards to breakfast, room condition, and brand presentation. It has not applied the same discipline to canine hospitality, and section 14 sets out what that costs and what fixes it. The brands and properties that establish and enforce measurable standards, by whatever mechanism, will capture a growing, high spending, and increasingly expectant guest segment. Those that leave execution to property discretion will continue to produce the variance documented in this paper.

Methodology

Assessment Framework

All hotel assessments referenced in this paper were conducted using the Roch Dog Friendly Standard (RDFS-02), a criteria based evaluation framework comprising 31 weighted questions across four categories: pet policy (fees, weight limits, restrictions), access (rooms, public areas, outdoor spaces), amenities (beds, food, bowls, services), and guest experience (staff training, dedicated programmes, operational integration). Scores are converted to letter grades using fixed thresholds from A+ (above 45) to F (10 or below).

Grades and scores are Roch Dog's assessment opinion, produced by applying the published criteria to information provided by or published by each property. Where a property answers only part of an assessment, unanswered questions score No, so published scores are conservative floors rather than exact measurements. Brand league figures include every assessed property in the dataset regardless of certification outcome.

Dataset

The Roch Dog Assessment Dataset covers more than 3,000 hotels across 56 countries and is continuously refreshed through ongoing assessment and periodic reassessment of certified properties, including assessment through anonymous guest enquiry. Certification is free for every hotel and cannot influence a grade. The dataset has geographic concentration in North America and Europe and is under represented in Asia, Latin America, and Africa. Brand league figures reflect scored properties in the dataset as of August 2026 and are portfolio samples rather than complete brand portfolios.

Search Demand Research

The demand language findings in section 3 are drawn from Google Trends data pulled directly by Roch Dog in July 2026: 33 term comparisons across 14 markets, monthly series from 2016 to 2025, with each term pair normalised within a single query so the two series are directly comparable. Google Trends reports relative search interest on a 0 to 100 index, not absolute query counts; all findings describe how terms move against each other, and none should be read as search volume claims. Values from one market are not comparable to values from another; only ratios and within market changes are reported. Two markets (New Zealand and South Africa) were excluded for insufficient search volume. Percentages are computed on annual means of the monthly series, so seasonality does not drive any figure.

Limitations

The dataset has not been externally audited. Assessment criteria are defined by Roch Dog, which is also the entity presenting this analysis. The revenue model uses assumptions derived from industry research rather than controlled experiments. The 5% occupancy lift assumption has not been validated through randomised controlled trials and should be understood as a reasonable estimate based on available data rather than a guaranteed outcome, and it should be read as net of any displacement of dog averse demand. The occupancy and rate figures the model rests on are measured in short term rentals, not hotels, because rental platforms publish booking data and hotel groups do not; the paper assumes the direction of the gap carries across and makes no claim that its size does. The repeat rate and length of stay figures quoted in section 4.1 are trade press claims from 2004 and 2006, cited through Buhalis and Chan (2023); Roch Dog has not measured either, no revenue figure in this paper depends on them, and earlier editions that presented them, or a 30% ancillary spend premium, as Roch Dog data were wrong to do so. The canine menu margin model and the menu and retail revenue estimates in section 6.2 are Roch Dog models built from published price points and stated cost assumptions, not disclosed operator financials, and are labelled as estimates wherever they appear. Operating return figures assume approximately 50% flow through of incremental revenue to gross operating profit, stated where used; actual flow through varies by property and cost structure.

Revenue projections assume competent execution, favourable market conditions, and sufficient local demand from dog owning travellers. Properties in markets with low dog ownership density, cultural resistance to dogs in hospitality settings, or limited infrastructure for dog inclusive programming may not achieve comparable results.

The InterContinental and Fairmont case studies represent single brands assessed at single points in time. Results may not generalise to all luxury brands or all market conditions.

Consumer survey figures cited from third parties are self reported by respondents and were not collected or verified by Roch Dog. The academic willingness to pay figures in section 4.2 come from a single choice experiment with Korean pet owners

and should be read as evidence of what owners value and in what order, not as a price list that transfers directly to other markets.

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