# Nobody Trusts Pet Friendly

The Search Data, the Complaint Record and
the Assessment Evidence Behind a Failed Label

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# Executive Summary

Searches for "pet friendly hotel" are falling in every mature English speaking market, and searches for "dog friendly hotel" are rising in all of them. That is the finding this paper is built on. In the United States, between 2022 and 2025, interest in "pet friendly hotel" fell 19% while "dog friendly hotel" climbed from 45% of the larger term's interest to 58%. Over the full decade from 2016 the dog term grew 72% while the pet term stood still. In Britain the shift finished before 2016 and the dog term now runs at seven times the pet term. Ireland crossed over in 2018, Australia in 2023.

A category's dominant descriptor does not shed a fifth of its search interest in four years because people stopped travelling with animals. The opposite happened. The segment grew. Dog owners did not abandon the search, they abandoned the word, and they migrated to the term that says what they mean. That is what a trust collapse looks like when you can measure it.

This paper documents what travellers stopped believing and why. It rests on four bodies of evidence: a primary study of Google search behaviour across 33 term comparisons in 14 markets from 2016 to 2025; a decade of public complaints written by dog owners, cat owners and hotel staff on review sites and forums across four continents, every one quoted verbatim and linked; the published consumer surveys of 2022 to 2026; and Roch Dog's own structured assessment of more than 3,000 hotels in 56 countries against a published standard. Half the hotels we have assessed under the "pet friendly" label grade D or F. Nearly nine in ten charge for the dog, one in three let it into no indoor shared space, and one in six charge a fee for a room that contains nothing for the dog and a hotel the dog cannot enter.

The commercial argument runs alongside the consumer one. Hotels are optimising for a declining term they cannot rank on, in language their customers have stopped believing, to describe an animal they mostly do not name. The hotels that suffer most are the ones that have actually invested, because the label flattens them into the same claim as the property that did nothing but take down the "no pets" sign.

The paper closes with the fix. It is not a better adjective. It is a published definition, a graded assessment every hotel can be measured against at no charge, and independent verification that a dog owner cannot dismiss as marketing. A government has already conceded on the record that the label has no definition. The regulators who police hidden fees have already moved. The search data says travellers moved first.

SECTION 1

# The Evidence of Collapse

The industry has treated "pet friendly" as a settled, functional piece of vocabulary. The people it is aimed at stopped treating it that way some time ago, and they left a long, public, dated record of doing so. The cleanest part of that record is the search bar, because nobody is being asked a question and nobody is performing an opinion. People type what they mean when they want something.

In July 2026 Roch Dog pulled the Google Trends series directly, 33 paired comparisons across 14 markets, monthly from 2016 to 2025, each pair requested in a single query so the two terms are normalised against each other and directly comparable. The United States baseline that earlier editions of this paper rested on reproduced to the decimal: "pet friendly hotel" down 19% between 2022 and 2025, "dog friendly hotel" up from 45% to 58% of its volume. The decade tells the same story more firmly. From 2016 to 2025 the pet term is flat at minus 2% while the dog term is up 72%, and the ratio moves from 33% to 58%. The ten year arc is the better one to publish, because a four year window invites the objection that 2022 was a post pandemic travel spike. It was. The decade is not.

A note on the measure, because the argument rests on it. Google Trends reports relative search interest on an indexed scale rather than absolute query counts, so every figure here describes how two terms move against each other, not how many people searched. That is the right measure for this question, since the question is which words travellers reach for, not how many of them are travelling. Values from one market cannot be compared to values from another; only the ratios and the within market changes travel. The series is public and anyone can reproduce the American comparison in a browser in under a minute.

The United States turns out to be the laggard. Every English speaking market we measured moves the same way and most are further along. In Britain "dog friendly hotel" overtook "pet friendly hotel" before 2016 and by 2025 ran at 468% of it; strip the word hotel and compare the bare labels and the British ratio is 704%, seven to one. Ireland crossed over in 2018 and stood at 243% by 2025. Australia crossed in 2023. Canada, at 42%, has not crossed yet but is moving.

Across all five markets the pet label fell by between 16% and 29% from 2022 to 2025 while the dog label held flat or grew in every one. The American ratio on the bare terms has gone from 55% to 93% in a decade, which puts the United States within reach of crossover on its current trajectory. Britain is not an outlier. It is the finished state.

Continental Europe never adopted the pet word in the first place. In German and Dutch the pet generic construction, "hotel mit haustier" and "hotel met huisdier", sits at or fractionally above zero for the entire ten years while the dog construction runs at real volume. Nobody searches that way in those languages. France and Italy settled on the dog word before the

window opens, and the dog term ran at 212% of the pet term in France and 496% in Italy by 2025. The hospitality markets that wrote their own vocabulary wrote it around the animal that actually arrives.

There is a reversal, and it is the most useful part of the dataset. Spain, Brazil, Germany and Italy are importing the English phrase "pet friendly" as a loanword, and it is growing fast: up 808% in Spain, 657% in Brazil, 591% in Germany and 277% in Italy over the decade. In Brazil the loanword has displaced the native phrasing outright, "hotel aceita pet" up 1,079% while "hotel aceita cachorro" fell 75%. In Spain both native constructions are collapsing while the import climbs. These markets are roughly a decade behind Britain and are adopting a label that has already failed in the language it came from. They are importing the trust problem, not solving it.

That is also the honest correction to an earlier version of this paper. "Pet friendly hotel" is not declining worldwide. Globally it rose 28% from 2022 to 2025. The decline is specific to the mature English speaking markets where the word has had time to be found out. The ratio still moves toward the dog word everywhere, from 51% to 58% worldwide, so the direction of travel holds; the absolute decline does not. The foreign language picture is the subject of its own paper, Pet Friendly Doesn't Translate.

One category moves the other way, and it is the one that proves the point. In every hospitality and leisure category we measured, pubs, cafes, restaurants, beaches, cottages and short term rentals, the dog word is dominant or widening its lead. American beaches crossed over in 2024. The single exception is American residential lettings, where "pet friendly apartments" holds steady while "dog friendly apartments" fell 26% between 2022 and 2025 and the ratio narrowed from 28% to 18%.

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 animal is nearly always a dog, the word is inaccurate, and it is decaying. The label is surviving precisely where it is true and collapsing precisely where it is false. That is a far stronger claim than "pet friendly is dying", and it is the claim this paper makes.

SECTION 2

# What Dog Owners Write

Distrust shows up in search behaviour before it shows up in complaint, but the complaint record is where travellers explain themselves. Everything quoted in this paper is verbatim, published, and either linked to its source or named where the platform blocks automated access. The record was collected online, spans 2015 to 2026 and four continents, and none of it was solicited, commissioned or created by anyone with an interest in the outcome. The strongest entries are reproduced in the appendix to this paper.

The record opens in 2015, at the Grand Galvez in Galveston, where a guest paid a $100 non refundable fee, was told the dog could not use the grass, and was then asked to leave the lobby. The review they left distilled the whole problem into eight words: "They allow pets but are not pet friendly" (TripAdvisor). Ten years and a continent's worth of hotels later a guest at a Myrtle Beach resort arrived at the same thought independently: "The resort says it's pet friendly however it allows pets", before describing an eleven year old dog walking on rocks because "they provide no grassy area for him to use the bathroom" (TripAdvisor).

Between those two dates the sentence became a genre. "Not pet friendly, pet tolerant!" is a review title at a Niagara Falls hotel. "Not Pet Friendly, Just Pet Tolerant" at a Michigan motel. "Not really pet friendly!" at the Bellagio in Las Vegas. "Not Pet Friendly" at the Don CeSar in Florida. "Not actually pet friendly" at a New Orleans boutique hotel, "Fake Pet Friendly Hotel" at a California airport hotel, "Fake dog friendly and very noisy hotel" at an Ottawa one. The same verdict, in almost the same words, from the budget end of the market to the luxury end, written by people who have never met.

The verdict is not confined to reviews of individual stays. It is how dog owners talk about the category itself. A traveller researching hotels in Bangkok warns that "Most hotels that are listed as 'pet friendly' are really more like 'barely pet tolerant'" (Reddit, r/Thailand). A guest on a hotel group's own forum reports that "I've also found that 75% of the time, 'pet friendly' is actually 'pet tolerant'" (Reddit, r/hyatt).

On TripAdvisor's own Traveling with Pets forum the scepticism has hardened into thread titles. "'Pet friendly' is basically false advertising" is one, from December 2024, and the thread exists because enough people agreed to sustain it. In another a traveller states flatly that "Reading 'pet friendly' on TA is not reliable information" (TripAdvisor forums). In a third, a guest charged $75 at check in after booking through a pet friendly search concluded that "such significant undisclosed fees are deceptive at best and fraudulent at worst" (TripAdvisor forums).

Then there is the guest at a Scottish hotel who discovered, after noting the pet friendly claim, that the dog was barred from the bar and the restaurant: "I'm at a loss to know what any dog owners… are meant to do with their dogs at meal times. Please be honest in your claims"

(TripAdvisor Q&A). That one is worth sitting with, because it is not angry. It is a guest who has worked out that the hotel is not lying exactly, it simply never intended the word to mean what any reasonable reader would take it to mean, and who is asking, politely, for honesty. That request is the whole paper in a sentence.

The behaviour that follows is the tell. The characteristic habit of the modern dog owner is to telephone the hotel before booking, because they have learned that "pet friendly" is not an answer, it is the beginning of an interrogation they have to conduct themselves. What is the fee, is it per night or per stay, is there a weight limit, can the dog come into the bar, can the dog be left in the room, is any of this written down. An entire category of traveller now treats hotel marketing as a claim to be verified rather than information to be used. Every one of those calls is a guest who was not confident enough to book. Behind each caller are others who did not call and simply booked somewhere they trusted instead.

The travel press and the insurers now write consumer warnings about the label itself. "Don't be fooled by a 'pet-friendly' hotel — it'll almost always cost you" is a Points Guy headline from 2022. A travel insurer tells its own customers that "Sometimes 'pet-friendly' just means 'pet-tolerant to a point, and only if you pay extra'" (Generali Travel Insurance). On hotel forums regulars post advisories with titles like "Pet friendly does NOT mean its free". When a marketing term requires published warnings before it can be safely acted on, the term has stopped doing the job marketing terms exist to do.

The survey data says the same thing in numbers. Wag, the pet care platform, surveyed 1,002 pet owners in June 2022 and found that 84% had encountered at least one issue with overnight accommodation when travelling with their dog or cat, that 48% describe hotel accommodation with a pet as difficult, and that 94% would trade away at least one common hotel amenity for more pet friendly policies. Mars, announcing its pet travel partnership with Tripadvisor in May 2024, reported that 33% of pet parents have altered their travel plans because of the difficulty of travelling with them. A July 2026 survey of 2,000 American pet owners by Talker Research for Subaru found that 45% had turned down a trip because it could not accommodate their pet, that 41% named finding pet friendly accommodation as the hardest part of travelling with one, and that 70% said leaving the pet at home shortens the trips they do take.

In Britain, Direct Line's March 2026 survey of 2,001 cat and dog owners found that 62% take the pet on holiday, 40% choose pet friendly accommodation to do it, and nearly a quarter do not feel prepared for the unexpected costs. The market is not shrinking. Amadeus's Travel Trends 2026 reports, from a Shape Insight survey of 2,896 travellers in Britain and America, that 27% of the owners who took their pet on their main holiday in 2025 were doing so for the first time. These are third party figures and we present them as reported. Read together they describe a market where nearly half the customers find the product difficult, a third to a half have changed or dropped a trip to avoid it, and new owners keep arriving to discover the same thing.

SECTION 3

# The Institutional Admission

In April 2025 the Government of Hong Kong, answering a question about pet friendly premises, stated on the official record that such venues are self described and that "there is no specific or consistent definition of this type of restaurants".

That is a government conceding, on the record, that a term in widespread commercial use has no definition behind it. It is the single most useful sentence in this paper, because it means the central claim is no longer an argument that Roch Dog is making. It is a matter of public record, and any hotel that wishes to dispute it is disputing a government, not us.

The concession was not academic. Within a year the South China Morning Post was reporting dog owners filing formal complaints about venues marketed as pet friendly whose rules, staff and spaces said otherwise. A label with no definition cannot be enforced, and a city that had just said so in public was watching its residents discover the same thing one brunch at a time.

The industry has started saying it too. A hotel brand's own published guidance to travellers, from 2026, states that "The pet-friendly label on a hotel listing has no standardized definition across the industry", and that it "covers a wide range of experiences, from a signed waiver and a grass strip near the parking lot to a dedicated program with welcome amenities, flat per-stay fees, and no breed or weight restrictions" (Sonesta). The same guidance concedes the point this paper makes about booking platforms: "Booking platform listings show availability and price. Species restrictions, breed policies, fee breakdowns, and unattended pet rules come from the front desk directly."

A hotel manager writing in a trade publication in 2023 explained that because guests forget or decline to declare their animals, "it's virtually impossible to guarantee that a room has never housed a pet" (Today's Hotelier). An industry analysis published in 2026 puts the consumer's reading of it in one line: "Pet friendly is often code for: we'll tolerate your pet, for a price" (Futurestays).

When the brands, the managers and the trade press all describe the label the way its critics do, the label is not being misread. It is being read correctly. The gap is not between what hotels mean and what guests understand. It is between what the word promises and what anyone, on either side of the desk, expects it to deliver.

The regulators have moved on the practice the label most often hides, which is the fee that appears late. The United States Federal Trade Commission's Rule on Unfair or Deceptive Fees took effect on 12 May 2025 and applies directly to short term lodging: the total price, including every mandatory fee, must be the first and most prominent price the guest sees, drip pricing is prohibited, and a fee may not be labelled as something it is not. A non negotiable pet fee charged to a guest who has booked as a pet owner is a mandatory fee under the rule, and the civil penalty runs above $50,000 per violation.

The states were moving before the federal rule and have not stopped. The Texas Attorney General has settled with six hotel chains and booking platforms over hidden hotel fees, Hyatt for $1.25 million in December 2025 and Booking.com for $9.5 million among them. California, Virginia, Colorado, Oregon, Connecticut, Minnesota, Massachusetts and Illinois have legislated. New York City's rule took effect in February 2026 after the city's consumer regulator logged more than 300 complaints about hidden hotel fees and unexpected card holds in a single year (NYC Department of Consumer and Worker Protection).

Britain banned drip pricing under the Digital Markets, Competition and Consumers Act from 6 April 2025 and gave the Competition and Markets Authority the power to fine without going to court. Australia passed its Unfair Trading Practices Bill in July 2026, applying from July 2027, with a specific drip pricing provision. The pet fee discovered at the desk, the single most common complaint in the record, is now unlawful in every major market a hotel sells into. The Hotel Pet Fee sets out the law market by market and what it means for each fee structure.

The direction is the same at every level. A government says the word has no definition. The brands say the listing is not the policy. The regulators say the price the guest sees first must be the whole price. None of them was persuaded by Roch Dog. They were persuaded by the same record of complaint that this paper quotes, and they arrived at the same conclusion the search data records: a claim that cannot be checked is not a claim, and the market stops treating it as one.

SECTION 4

# The Word Was Never Accurate

Before the trust problem there was an accuracy problem, and the second caused the first. "Pet friendly" does not specify an animal. It does not have to, because nobody has ever defined it. In practice it is used overwhelmingly by properties that accept dogs, and the guests arriving under it are overwhelmingly arriving with dogs.

That is no longer our assertion alone. In October 2026 the International Journal of Hospitality Management published the first attempt to define the term, Koufodontis (2026), from the University of the Aegean. The author reviewed some 6,000 sources published up to the end of 2025 and found that in thirty years of use no scholar had ever defined pet friendly from evidence. The handful of definitions in circulation had been lifted from commercial websites, a dictionary and a master's thesis, and almost all of them amounted to "pets allowed". A label the whole industry trades on had never been given a meaning by anyone with a reason to check it. The same review found the word used of hotels five times more often than of anywhere else and, in the author's words, applied contextually rather than conceptually, which is an academic way of saying that it means whatever the property using it wants it to mean. Thirty years of marketing have rested on a term that nobody owned and nobody could be held to.

Our own data puts a number on the gap. Across the hotels we rank, roughly a third accept cats. In the United States it is closer to a quarter, in Japan one hotel in twenty five, and only in Canada and Italy does the figure approach half. The overwhelming majority accept dogs, and only dogs. A category that markets itself with a word promising every pet delivers, in practice, one species, and the 46 million American households that own a cat have learned to read the industry's most common welcome as not addressed to them.

The percentage is not the injury, though. The injury is in what cat owners describe, because they are the ones the word recruits and then turns away. One, booking holiday lets, describes the routine that finally beat them: "We would get so many callbacks saying 'oh, by pet friendly, we just mean dogs…'. That we stopped trying with them" (Reddit, r/vrbo). Another, in a thread about a hotel chain, is past politeness: "Then when you call they tell you they mean dogs. Then just say that on the website and stop wasting everyone's time" (Reddit, r/hyatt). A third puts the charge plainly: "It's disingenuous to say pet friendly and later specify oh I didn't mean THAT one!" (Reddit, r/vrbo).

Notice what these travellers are asking for. Not that every property take cats. That the property say what it takes. The complaint is never "you should accept my cat". It is always "stop wasting everyone's time". The word is the offence, not the policy.

There is an obvious objection to a dog certification body raising this, and it deserves answering directly. The problem is not being specific about a species. The problem is hiding it.

"Pet friendly" fails because it will not admit what it means. An honest property names the species it serves and then serves it properly. A genuinely cat friendly hotel should say so and prove it. Vagueness is the problem, not specificity.

There is a related habit worth naming. Hotels publish thousands of words about dog beds, dog bowls, dog menus and dog walking routes without using the word "dog" once, all of it filed under "pet friendly", when the entire operation revolves around a single species. Most hotels are talking about dogs. They are simply not saying so. Dog owners notice. Almost nobody calls their dog a pet in conversation, and nobody outside a marketing department says "pet parent". When a hotel reaches for that language, the guest hears a business that has not thought about them.

SECTION 5

# How the Promise Breaks

The failures in the complaint record are not random and they are not thirty unlucky hotels. The same patterns repeat across every market and every price point, and each one teaches the guest the same lesson: the label cannot be taken at its word. Our assessment data lets us say how common each pattern is, not as a count of hotels but as a share of the hotels we rank, drawn from more than 3,000 assessed in 56 countries.

It starts with the undefined claim. The term has no legal definition, no standard, no audit and no consequence for misuse. Any property may apply it to itself. Every other failure in this section is possible because of this one.

The Aegean study then asked 1,041 travellers in 66 countries what the label has to deliver before they will believe it, and their answers set the floor the industry has never set for itself. Just over three quarters named the right facilities and clear, transparent rules, and nearly as many named staff who know what to do; nine in ten accepted a hotel that admits the dog, publishes its rules and provides the basics. What they would not accept is the hotel this section describes. Only 27 per cent would call a cafe pet friendly if the dog may sit on the terrace and nowhere else. Only 12 per cent would call a hotel pet friendly if it accepts some kinds of pet and turns others away, and only 11.7 per cent if it charges a high fee for the dog. Nearly nine in ten of the hotels we rank charge for the dog, at a typical American fee of $150, and more than a third turn dogs away by weight. The threshold barely moved with age or sex; where it moved was by region, and Europeans were the strictest judges of all, accepting a restricted or fee laden arrangement less than half as often as Americans. Measured against the travellers' own thresholds, the typical pet friendly hotel does not qualify for its own label.

The welcome comes with terms that were never disclosed. Dogs are allowed, and then barred from the bar, the lounge, the restaurant and the terrace. One property in the record confines dogs to first floor pet rooms and charges $300 if the dog is found on another floor (TripAdvisor Q&A). A guest in California was told after booking that the dog could never be left alone in the room, not even crated, and replied: "I would not consider that 'pet-friendly' at all!!!! Very misleading" (TripAdvisor Q&A).

In our data one hotel in three allows the dog into no indoor shared space at all, not the bar, not the lounge, not the restaurant, and more than a quarter offer not even a terrace. Half will not let the dog be left in the room. A dog that can go nowhere and cannot be left behind is not a guest. It is a problem the hotel has agreed to tolerate for a price.

The fees buy nothing. A fee is legitimate when it reflects a real cost and is stated up front. What the record describes is a fee stacked on a fee, disclosed late, with no corresponding service. "Currently I'm staying in a Country Inn Suites and they are charging me $50 a night for a dog. I have two so it's going to be $300 for the weekend…

total scam and a money grab" (Reddit, r/Pets).

Nearly nine in ten of the hotels we rank charge for the dog. Of those that charge, more than a third put no bowls in the room, nearly half provide no bed, one in three provide neither, and one in six charge a fee for a room that contains nothing for the dog and a hotel the dog cannot enter beyond that room. The fee does not track quality in either direction: the typical fee at an A grade hotel and at an F grade hotel is the same. Our survey of 120 housekeepers found fewer than one in twenty who thought a dog added significant work, and the real incremental cost of a dog in a room is $6 to $25 a stay. The typical American fee is $150. The Hotel Pet Fee sets out the arithmetic so the reader can run it themselves. A hotel that disagrees has an easy answer available: publish what the fee actually pays for.

Nothing is verified by anyone. No certificate, no audit, no published criteria, no inspection. The hotel wrote the claim about itself and nobody checked. Every other quality signal a hotel displays has a body behind it. This one has a copywriter.

The booking filters repeat the claim at scale. Booking platforms operate "pet friendly" filters that do not verify the label, do not surface fees, and do not reflect breed or weight exclusions. Properties that have quietly stopped taking dogs remain in the filter. A traveller in Dublin found "a lot of them were saying they're pet friendly on the Google results but calling/websites said they're not actually pet friendly" (Reddit, r/Dublin). This is the failure that scales furthest, and the party operating the filter takes a commission on the booking it misdirects.

The welcome excludes the family dog. More than a third of the hotels we rank publish a weight limit, and in the United States it is nearly half. Where a limit is set, three in four sit at 50 pounds or below and more than a quarter at 25 pounds or below. A 50 pound limit excludes the Labrador, the Golden Retriever, the German Shepherd and the Border Collie, four of the ten most popular breeds in America. A 25 pound limit excludes almost every family dog there is. One guest was expelled mid stay: "Kicked me out in the middle of my stay from a Red Roof Inn in Durham, NC because my dog is a pit bull. Be sure to call ahead -- some Red Roofs have secret breed bans!" (Reddit, r/dogs). The corporate office backed the property. The Fine Print sets out the alternative, a Friendly Dog Policy that judges a dog by its behaviour rather than its weight, because that is the test the law itself already applies to assistance dogs.

The dog gets the worst room in the building. Ground floor, by the bins, no view, and carrying the accumulated smell of everything that stayed there before. "Most pet rooms smell in my experience", writes a guest in a thread asking whether all dog friendly rooms are like this (Reddit, r/marriott). A room in Maryland "smelled as bad as [an] unkept kennel" (TripAdvisor). Four hotels in ten that we rank restrict the dog to a subset of rooms. The guest pays a premium for a discount room.

And at the end of the chain, the system starts to eat itself. A guest who asked for a pet free room for allergy reasons "Was told that NO ROOMS are pet-free because people 'sneak

pets in all the time'" (TripAdvisor). On the forums, guests now explain to each other why the sneaking happens: "We learnt our lesson. I always search for pet friendly accommodation but then I don't disclose our extremely well behaved service dog. What they don't know they can't charge us for" (Reddit, r/AirBnB). The fees created the undeclared dogs, the undeclared dogs destroyed the pet free rooms, and every party in the transaction now assumes the other is lying.

Each of these patterns, on its own, is a bad stay. Together, repeated across a decade and every market in the record, they are how a category loses the trust of its customers. Nobody needed to organise it. The word made every one of them possible, because a word with no definition cannot be broken, and a promise that cannot be broken cannot be kept.

SECTION 6

# What This Costs Hotels

The consumer harm is the story. The commercial harm is the reason hotels should care, and it is larger than most operators have calculated.

On paper "pet friendly hotel" looks like the obvious term to chase. It still carries more volume than the alternative in the American market. It is also one of the hardest terms in travel to rank on, because it was captured a decade ago. Expedia, Booking, Hotels, Kayak, Trivago and Google Hotels have built vast programmatic libraries around every variation of the phrase, and the established specialist directories hold years of accumulated authority. A hotel publishing another "pet friendly" page is not competing with the property across the street. It is competing with billion dollar platforms, on their strongest term, in their language, and it will lose. It will be outranked by the very intermediaries that charge it commission on the booking they intercept.

Stated plainly, the prevailing strategy is to optimise for a declining term, against competitors it cannot outrank, in language its customers have stopped believing, to describe an animal it does not name. No one would approve that plan if it were said out loud in a meeting. It survives because it is never said out loud.

The cruellest part of the label is that it does the greatest damage to the properties that deserve it least. A hotel that has genuinely invested, trained its staff, built a dog menu, stocked real bowls, opened its indoor spaces and written a consistent policy, appears in the same results, under the same two words, as a property that did nothing but remove the "no pets" sign. The label flattens both into the same claim. The investment is real and the differentiation is zero.

This is the mechanism by which a broken label degrades a whole market. When the honest signal and the dishonest signal are identical, there is no return on honesty, and investment migrates elsewhere. The academic literature describes the same mechanism from the guest's side. A 2023 study of 697 people who had travelled with their dogs found that institutional trust and attitude to risk drive their use of specialist dog friendly booking channels over the general platforms: dog owners behave as risk managers who seek out sources they can trust (Hoy, Stangl and Morgan). A 2026 study that ran 13,604 TripAdvisor reviews of pet friendly hotels through machine learning found that cleanliness works as a threshold rather than a trade off: a hotel that fails it is not considered at any price (Li, 2026). The guest is not reading the label. The guest is reading the evidence around it.

The guest being lost is the valuable one. Short term rental data, which is measured where hotel data is not, shows what the segment is worth. AirDNA finds that listings which take pets earn $17.41 more a night and 5.4% more demand than those that do not, and KeyData's September 2026 analysis of managed rental portfolios puts paid occupancy at 54% against

48%, average daily rate at $379 against $346 and revenue per available night at $204 against $165. The trade press has long claimed that dog owning guests return at 76% against an industry benchmark in the thirties and stay 2.56 nights against 2.1; those figures come from American trade magazine pieces of 2004 and 2006 cited through Buhalis and Chan, and we treat them as indicative rather than as our own data.

What a dog owner will actually pay for has been measured directly. A choice experiment with 491 dog owners at Kyung Hee University found they would pay a premium of about $146 a night for a staffed pet lounge and about $117 for a play area, and valued an in room amenity bundle at less than nothing, because a basket of kit in the room is what a hotel offers instead of letting the dog out of it. Our guide to that study, What Dog Owners Will Pay For in a Hotel, sets out what it means for a programme and a fee, and The Economics of Dog Friendly Hospitality builds the revenue model on it.

The fastest growing part of the segment has a name, DINKWADs, dual income, no kids, with a dog, with an estimated $259 billion a year in spending power. There is a revenue surge in this industry, it has a species, and the industry's own marketing language refuses to name it.

SECTION 7

# What Our Own Assessment Found

Roch Dog has assessed more than 3,000 hotels across 56 countries against a published standard, using more than 70 data points per property covering policies, provision, access, restrictions, services and consistency. Every property is assessed under the same framework, using the same criteria, most of them by anonymous guest enquiry and the rest by self assessment subject to verification. The dataset spans independent boutiques, global luxury chains and mid market brands, and it is the largest structured evaluation of dog friendly hospitality ever conducted. The figures below are drawn from the hotels ranked and published on rochdog.com as of October 2026.

Half of them grade D or F. Three in ten grade A+, A or B. Just over half meet all six minimum requirements of the standard, the floor below which a hotel cannot honestly describe itself as dog friendly. Nearly half the hotels wearing the label fail a definition that asks only for a written policy, a pair of bowls, one indoor space the dog may enter, a fee the guest can see before booking, a straight answer on deposits and a stated number of dogs per room.

The failures cluster around the same structural gaps rather than distributing randomly. The most common is the absence of indoor shared space. A property that confines a dog to the guest room is not offering dog friendly hospitality, it is offering a room that tolerates a dog, and it is segregating the guest from the hotel experience they are paying for. One hotel in three that we rank does exactly that.

The second is size and weight exclusion, published by more than a third of the hotels we rank and nearly half of those in the United States, at limits that exclude the standard family dog in three cases out of four. A property that excludes the family dog while describing itself as pet friendly has not made an honest claim. The third is unpublished or inconsistent policy. Guests are told one thing at booking and another at check in. Staff apply restrictions that appear nowhere in writing. Fees surface after the reservation is confirmed. In the bottom half of the dataset this is not an edge case, it is the norm.

Price does not buy the welcome the label implies. Among the five star hotels we rank, roughly six in ten meet the standard's minimums; among four star hotels the figure is four in ten, and six in ten of them grade D or F. The luxury tier is better, not good, and the spread inside it is the subject of its own paper, Dog Friendly Performance Across Luxury Hotel Portfolios, which finds the same brand running from A+ to below zero across its own portfolio.

The markets differ more than the price tiers do. In Britain more than eight in ten of the hotels we rank let the dog into at least one indoor shared space and under four in ten grade D or F; in Canada fewer than half open an indoor space and two in three grade D or F. The British pub tradition, where the dog under the table is unremarkable, shows up in the data as the most dog friendly hotel market we measure, and it is also the market where the search term crossed

over first. Trust and provision travel together.

What the hotels provide tells the same story in the positive. About two thirds put bowls in the room and a little over half a bed. Fewer than two in five offer a treat. Fewer than one in five can direct a guest to an emergency vet. Fewer than one in ten say their staff are trained to handle dogs, which is the provision a guest cannot see from the listing and the one that decides how the stay actually goes. The hotels at the top of our ranking, the InterContinental Miami and Eden Roc Cap Cana among them, do all of these things and publish the fact; the hotels at the bottom do almost none of them and publish the same two words. Every requirement in the standard addresses a failure mode that appears repeatedly in this data. The standard was not designed in theory and then tested. It was built from the evidence.

SECTION 8

# Why a Standard, and Why Independence

In most areas of hospitality, standards exist. Fire safety is regulated. Food hygiene is inspected. Star ratings follow agreed criteria, however imperfectly. Dog friendliness has no equivalent. There is no agreed definition, no accountability and no floor, so hotels self declare and guests have no benchmark to check them against.

Standards do one thing: they turn claims into facts. Before food regulation, "clean" meant whatever a restaurant decided it meant. Before energy ratings, "efficient" was a marketing choice. Without a shared definition a claim is unverifiable. With one it is checkable. The only real question is who writes the definition and whether they can be trusted to hold it.

The academic literature has now reached the same conclusion. Koufodontis (2026) closes by separating what should be standardised across the industry, the minimum operating conditions, how the rules are communicated and who is responsible for what, from what can legitimately vary from one hotel to the next, the amenities, the branding and the positioning. It finds that weak rules, uneven enforcement and untrained staff do more to destroy a hotel's claim than the absence of any extra service, and it names the next piece of work the field needs as certification criteria and benchmarking tools built on those conditions. That is a description of a standard with a floor and a grade above it, which is what the next section sets out.

The timing is not incidental. Dog ownership rose sharply from 2020 and has not reversed, and what changed was behaviour as much as volume. A large cohort began travelling with dogs by default rather than by exception, and those habits have held; Amadeus's finding that more than a quarter of the owners who took the dog on holiday in 2025 were doing so for the first time says the cohort is still growing. Supply increased in name but not in substance. More hotels described themselves as dog friendly without any shared definition or consistent delivery, so the gap between what was claimed and what was experienced widened. At small scale that is friction. At scale it is market failure, which is precisely what the search migration is now recording.

If hotels define dog friendly, the definition serves hotels. If booking platforms define it, the definition serves platforms. Neither has an incentive to set a meaningful floor and both have every incentive to maximise the number of properties that qualify. That is exactly what happened, and the term was stretched until it covered almost anything.

The history of standards elsewhere explains why this matters. Food hygiene standards are not written by restaurants. Fire codes are not written by developers. Energy ratings are not administered by appliance manufacturers. Wherever a standard carries public trust, the body that defines and enforces it operates independently of the industry it certifies, because a certifier whose revenue depends on approving applicants will lower its threshold over time,

and a certifier whose credibility depends on the standard being meaningful has the opposite incentive. The industry has already lived through what happens when quality designations are controlled by the parties being assessed. Star ratings in many markets are self declared. Review platforms are gamed. Pet friendly filters have no verification behind them. The result is always the same: the designation loses meaning, the guest loses trust, and the hotels that genuinely invested lose the ability to distinguish themselves from those that did not.

Roch Dog is not owned by a hotel group. We take no advertising revenue from the properties we assess and we do not sell directory placements or priority listings. Certification is free for every hotel, every assessed hotel is graded and listed whether it asked to be or not, and the grade cannot be bought, changed or opted out of. A hotel that disagrees with its grade has one route to a better one, which is to change what it does and be reassessed. That alignment cuts both ways and it has to. We benefit when the standard is trusted, and we lose nothing by grading a property exactly as its own staff described it to us. Any certification body that forgets this discovers that the value of its mark was entirely downstream of the integrity of the assessment behind it.

What separates a certified hotel from its pet friendly peers is independent, third party verification. A grade against a published standard, awarded by someone who does not work for the hotel, is the one claim a dog owner cannot dismiss as marketing, and it has become the mark of trust among high value dog owners, the guests who travel often, stay longer and choose the hotel for the dog. A hotel can self assess, and a hotel that does what The Canine Hospitality Playbook describes will meet all six minimum requirements and grade well, but every self assessment is subject to independent verification.

Through the year our assessors check the answers with housekeeping, the front desk, reservations and the concierge, at separate times and without announcing themselves, and we listen to guests when they report on their stays in reviews. A hotel that delivers what it says holds its grade. A hotel that does not is regraded on what its own staff told us. The guest at the Scottish hotel in section 2 asked for honesty. Verification is what makes honesty the cheaper option.

SECTION 9

# The Roch Dog Friendly Standard

The Roch Dog Friendly Standard (RDFS-02) is a written, published, publicly available definition of what it means for a hotel to be dog friendly. It sets the floor below which no property can legitimately use the label, and above that floor it grades, so that a guest can tell the hotel that clears the bar from the hotel that clears it by a mile.

The floor is six minimum requirements, each of them a direct answer to a failure documented in this paper. The hotel must have a written dog policy and make it available to every prospective guest before they book, published or supplied in writing on request, because the undisclosed rule is the first thing the complaint record describes. It must provide food and water bowls in the room as standard, because a hotel that will not supply a bowl has not thought about the dog. Dogs must be allowed to accompany guests in at least one indoor shared guest area, a lounge, bar, restaurant or cafe, because outdoor access alone confines the guest with the dog.

Any dog fee must be disclosed in that policy, with its amount and whether it is charged per stay, per night or per dog, and zero is a valid answer. The hotel must state whether a deposit applies and, if it does, how much, since a non refundable "deposit" is a fee by another name. And it must state how many dogs a room may hold.

A hotel that meets all six carries the designation Meets the Roch Dog Friendly Standard and may grade anywhere from B to A+. A hotel that misses any one of them is still assessed, still graded and still listed, but can rank no higher than C, and its page says plainly that it does not meet the standard. There is no "fail" and no exclusion, because excluding a hotel from the record is how a label stays undefined. Every hotel is on the record, and the record is the point.

Above the floor, the grade. Every hotel is scored across more than 70 data points covering what the dog gets, where the dog may go, what the stay costs, which dogs are welcome and what the hotel can do for them, from a dog menu and a walking service to staff who know how to handle a dog and a front desk that can name the emergency vet. The grade runs from A+ to F and is published with a written review of the hotel on rochdog.com, so that a guest can see not just the letter but the reasons. The test, in plain terms, is the one a guest with a normal family dog would apply: can we stay in a proper room, can my dog come with me to at least one place I will actually sit, will there be bowls when we arrive, do I know the cost and the rules before I book, and will the answer be the same whoever is on the desk.

The assessment is independent. Most hotels are assessed by anonymous guest enquiry, in the language of the market, with the questions a prospective guest would ask; the rest self assess, and every self assessment is verified the same way. Answers are taken from the hotel's own words and the grade is derived from them by a published scoring model, so that two hotels giving the same answers get the same grade. Certification is a live status rather

than a permanent award: hotels are reverified through the year and reassessed annually, and a hotel whose practice has changed is regraded, up or down, on what it now does. Where a hotel's published marketing and its stated policy conflict, the policy governs, because the policy is what the guest will meet at the desk.

The standard is public, in 20 languages. Any hotel can read it before it is assessed and any guest can read it and know exactly what a certified property is required to provide. That transparency is the source of the standard's authority, and it is the reason the grade means something that the label never could. The word "pet friendly" is a claim a hotel makes about itself. A grade under a published standard is a finding someone else made about it, and the difference between those two things is the whole of this paper.

SECTION 10

# Conclusion: Call a Dog a Dog

The way out costs nothing, which is what makes the present situation so strange.

Many hotels cannot abandon "pet friendly" everywhere. The booking platforms' categories are built on it and corporate templates enforce it. But those constraints do not touch the channels a hotel owns. The website, the policy page, the Google Business Profile, the booking page and the reception script are all yours, and those are precisely the surfaces where specificity wins.

If your property welcomes dogs, say dogs. Say which dogs, at what weight if you must have one, in which spaces, at what cost and how many. Answer the questions guests currently have to telephone you to ask, and answer them before booking, in writing, with the same answer whoever is on the desk. A person typing "dog friendly hotel" has told you exactly what they want, and search engines increasingly reward the page that answers a real question. In Britain that person is already seven times more common than the one typing "pet friendly hotel"; in America they are closing fast. But search is the smallest reason to do it. Speaking to dog owners in their own language, about their actual dog, is a form of respect, and they reward it with the longest stays, the highest spend and the fiercest loyalty in leisure travel.

None of this required a standard. What required a standard was the next part: proving it. Trust in travel does not come from claims, it comes from structure: clear definitions, published policies and independent verification. A certified hotel is not describing itself, it is meeting a published standard, assessed independently, graded against every other hotel that has been assessed, and held to it over time. The guest knows what they are booking and the hotel knows what it has committed to.

The regulators have already decided that the price a guest sees first must be the whole price, so the fee at the desk is finished whether or not the label survives it. A government has already said on the record that the label has no definition. The platforms have already conceded, in their own guidance, that the listing is not the policy. And the search data says travellers decided before any of them, by moving to a word that means something. The industry can meet them there, or keep optimising for a term its own customers have stopped believing.

Almost every "pet" checking into your hotel arrives on four paws and a lead. Show the customers driving your growth the respect of accurate language, and then prove the claim.

Call a dog a dog.

# Appendix: In Their Own Words

Before any analysis, the record itself. What follows is a selection from the public complaints collected online for this paper, the entries that most directly underline its argument, reproduced as written. Everything below was posted in public by a traveller, a guest, a host or a hotel worker between 2015 and 2026, and each is linked to its source where the platform permits automated access and named where it does not. Nothing was solicited. This is what dog owners think "pet friendly" means, because it is what "pet friendly" has meant to them.

The most common story in the record is the fee that appears at the desk. A traveller who booked two Florida hotels through a pet friendly filter: "Upon our arrival, they demanded a non-refundable cash pet fee of $75-$100 per night… not stated anywhere in their listings" (Reddit, r/travel). A dog sport competitor who travels constantly, four stays in a row: "No pet fees listed anywhere on the listing… when I checked in I was told there was a $10 per dog per day fee", and the money had consequences, "I had to cancel dinner plans… because the money had gone to the unexpected fee" (Reddit, r/AirBnB).

A guest at a Calgary hotel was "charged a $100 pet fee… not mentioned on the Hotels.com listing" and "felt blindsided upon check-in" (TripAdvisor). A guest quoted a fee the day before arrival called the timing what it is: "waiting until the day before is a bait and switch tactic to get you to pay the extra fee under duress" (Reddit, r/AirBnB).

The people inside the industry describe the fee honestly when nobody official is asking. "As a former property manager, it's 100% a scam. They built these pet fees into the yearly budget as income" (Reddit, r/Renters). Guests understand their position in that transaction perfectly. One, reviewing an Edmonton hotel, wrote that "they pretty much had us and felt they could charge us whatever they wanted" (TripAdvisor).

A travel blogger who rang ahead to check got the number and drew the only available conclusion: "I asked and they said the pet fee was $100 per dog per night. Yikes! That is not 'dog friendly' in my book" (You Did What With Your Weiner). A commenter in a thread about stacked pet charges explained the mechanism in one line: "Hosts will write anything to get you to click on their property" (Reddit, r/AirBnB).

Then there are the rules that surface after the booking is made. One guest booked precisely because pets were allowed, then read the fine print that unlocked after payment: "After booking, I can now see more detailed house rules that say no animals allowed unless it's a service animal, and that there would be a $250 fee" (Reddit, r/AirBnB). Sometimes the gap between label and reality is total: "the listing says 'dog friendly' but it usually means there are kennels outside that dogs can be kept in securely" (Reddit, r/dogs).

A frequent traveller summarised years of the same experience: "The amount of times I have been mislead after paying 1k+ for a booking with extra pet fees or certain sizes not being allowed is astronomical" (Reddit, r/airbnb_hosts). A guest turned away at a Michigan hotel listed as pet friendly wrote to the property that "we booked you specifically because you are

pet friendly and then we're left in the lurch without a room" (TripAdvisor Q&A).

The category verdicts are the ones that should worry an industry most, because they are not about one stay. "Most hotels that are listed as 'pet friendly' are really more like 'barely pet tolerant'" (Reddit, r/Thailand). "I've also found that 75% of the time, 'pet friendly' is actually 'pet tolerant'" (Reddit, r/hyatt). "Reading 'pet friendly' on TA is not reliable information" (TripAdvisor forums).

"'Pet friendly' is basically false advertising" (TripAdvisor forums, December 2024). "Sometimes 'pet-friendly' just means 'pet-tolerant to a point, and only if you pay extra'" (Generali Travel Insurance). "Pet friendly is often code for: we'll tolerate your pet, for a price" (Futurestays, 2026).

The cat owners, recruited by the word and turned away by it: "We would get so many callbacks saying 'oh, by pet friendly, we just mean dogs...'. That we stopped trying with them" (Reddit, r/vrbo). "Then when you call they tell you they mean dogs. Then just say that on the website and stop wasting everyone's time" (Reddit, r/hyatt). "I booked a pet friendly hotel on booking but they do not accept cat as a pet. The stay is not returnable" (Reddit, r/howto).

The allergy sufferers, who booked the other promise: one who asked for a pet free room "Was told that NO ROOMS are pet-free because people 'sneak pets in all the time'" (TripAdvisor); another, who booked for an allergy severe enough to risk anaphylaxis, titled the review "Noisy! Dogs come first! No rooms are pet free." (TripAdvisor).

And the industry, in its own words. "The pet-friendly label on a hotel listing has no standardized definition across the industry" (Sonesta, 2026). "It's virtually impossible to guarantee that a room has never housed a pet" (Today's Hotelier, August 2023). "Unfortunately, we can not guarantee the room you reserve would be 100% free from Allergens", a hotel's own published answer to an allergy sensitive guest (TripAdvisor Q&A). "There is no specific or consistent definition of this type of restaurants" (Government of Hong Kong, April 2025).

The guests, the hosts, the managers, the brands and a government, all describing the same word, all saying it does not mean what it says.

# Methodology and Limitations

The search figures in section 1 come from a Roch Dog primary study of July 2026: 33 paired term comparisons across 14 markets, pulled directly from the Google Trends widget API, monthly from January 2016 to December 2025, with the United States baseline additionally pulled weekly from 2022 to 2025 to reproduce the figure published in earlier editions. Each pair was requested in a single query so that the two terms are normalised against each other. Google Trends reports relative interest on an indexed scale, not query counts; nothing in this paper is a volume claim, and values are compared only within a market. Percentages are computed on annual means of the monthly series, so no figure rests on a single month. New Zealand and South Africa were excluded for insufficient volume. The German and Dutch results cover the "hotel with a pet" construction only and do not rule out other pet generic adjectives in those languages. The explanation offered for the residential counter example, that people rent flats with cats, is our reading of the pattern and is consistent with our assessment data; the series shows the divergence, not its cause.

The complaint record was collected online from public review sites, forums and published articles between 2015 and 2026. Quotes are reproduced as written, with an ellipsis marking any cut, and each is linked where the platform permits automated access and named where it does not; a review link that resolved when this paper was first written was later found to serve a different review, so every review link was rechecked for this edition and one quotation replaced. None of the material was solicited. The surveys cited in section 2 are third party work and are presented as reported, with sample sizes and dates; none is Roch Dog data. The repeat rate and length of stay figures in section 6 come from trade press of 2004 and 2006 cited in the academic literature and are treated as indicative only.

The assessment figures in sections 4, 5 and 7 are drawn from the hotels Roch Dog has assessed and ranked against the Roch Dog Friendly Standard as of October 2026, out of more than 3,000 hotels assessed in 56 countries. Most assessments were made by anonymous guest enquiry, the rest by self assessment subject to verification; unanswered questions score as not provided, so every provision figure is a floor. The sample skews to North America, Britain and Europe and to the hotels a dog owner is likely to search for, and is not a random sample of the world's hotels. Figures are given as shares of the hotels we rank rather than as counts. The dataset has not been externally audited. The legal position in section 3 describes the law as published by legislatures and regulators as of October 2026 and is not legal advice.

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Roch Dog is the dog friendly standards and certification body. We define what dog friendly means, then assess, certify and rank hotels, workplaces, and residences against the Roch Dog Friendly Standard.

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