

Dog Friendly Hospitality Performance in Luxury Hotel Portfolios

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Executive Summary

The hotel industry applies rigorous, measurable quality standards to almost every dimension of the guest experience. Room condition, food and beverage, brand presentation, loyalty programmes, and staff training are all governed by documented standards, inspected regularly, and enforced through brand compliance mechanisms. Dog friendly hospitality has received none of this attention. Despite a market projected to reach \$5.16 billion by the end of 2026, there is no industry standard for what "dog friendly" means, no framework for measuring performance, and no mechanism for holding properties accountable to a consistent guest experience. The result is a category where quality varies wildly and guests cannot predict what they will receive.

This study tests that reality through the most controlled lens available: a single luxury hotel brand assessed under a single evaluation framework. Thirty InterContinental Hotels and Resorts properties were evaluated using the Roch Dog Friendly Standard (RDFS-02), the same criteria based framework applied across a global dataset of approximately 2,000 hotels. The findings reveal a level of inconsistency that would be considered unacceptable in any other category of luxury hospitality.

The scoring spread within this single brand is 57 points, from an A+ property that ranks in the top 1% of hotels worldwide 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. The two properties charging the highest fees (\$250 per stay) both received F grades, while the highest performing property charges \$100. A guest paying more than double at one InterContinental receives an experience nearly seven times worse at another. The brand name, in this category, provides no reliable signal of quality.

The implications extend beyond guest experience. A conservative revenue model estimates \$2.3 million in incremental annual revenue per property for hotels that invest in structured dog friendly programmes, representing a 23x to 46x annual return on initial investment. Applied across the underperforming InterContinental portfolio, this represents approximately \$48 million in unrealised annual revenue. The most significant finding comes from within IHG itself: Kimpton, operating under the same parent company and franchise infrastructure, averages 52% higher scores with zero F grades across 22 properties. The operational knowledge to fix this problem already exists within the organisation.

What is missing is the decision to apply it.

Introduction

Dog ownership has grown into one of the most significant lifestyle segments in hospitality. In the United States alone, 65.1 million households own a dog, and 78% of dog owners travel with their dogs. The demographic driving this growth is increasingly defined by DINKWADs, dual income households with no kids and a dog. This segment combines high disposable income with travel flexibility and a willingness to spend on premium experiences for themselves and their dogs. They are not budget travellers looking for a room that tolerates animals. They are affluent consumers actively seeking hospitality brands that treat their dog as part of the travel experience, and their spending patterns, loyalty behaviour, and willingness to pay premium rates make them one of the most commercially valuable guest segments in modern hospitality.

The market reflects this. The global dog friendly hotel market is projected to reach \$5.16 billion by end of 2026 and \$8.17 billion by 2030. RevPAR fell 0.3% in 2025, the first non recessionary decline the industry has recorded. Traditional revenue levers are producing diminishing returns in a market where supply outpaces demand. Dog friendly hospitality represents a counter cyclical growth lever: a category where genuine investment generates measurable occupancy lift, ancillary spending premiums, and repeat booking rates that outperform the industry baseline.

Despite this, the hotel industry lacks a consistent definition of what "dog friendly" means. A hotel that permits dogs in one room category with a 25 pound weight limit, a \$250 fee, and no access to public areas describes an entirely different experience from a hotel that welcomes dogs throughout the property with dedicated amenities and no size restrictions. Both may market themselves as dog friendly. Only one delivers a dog friendly experience. Guests cannot reliably select hotels based on advertised policies, operators cannot benchmark their own performance, and brand leadership has no standardised framework for evaluating dog friendly operations across a portfolio.

This study examines that problem through a controlled lens: 30 properties within a single luxury brand, InterContinental Hotels and Resorts, assessed under identical criteria, in the same evaluation period.

Research Objective

The hotel industry lacks any systematic measurement of dog friendly performance at portfolio level. Individual properties self declare as pet friendly without reference to any shared definition, and brand leadership has no framework for evaluating whether that claim corresponds to an actual guest experience. The result is a category where performance varies wildly within brands, between brands, and across markets, but where no data exists to quantify that variation or its financial consequences. This study was designed to fill that gap.

The research addresses three questions. First, how much variation in dog friendly performance exists within a single luxury hotel brand when assessed under a consistent, criteria based framework? Second, what structural and operational factors explain the observed variation, and are the causes systemic or property specific? Third, what is the financial cost of underperformance, and what does the revenue opportunity look like for properties that choose to invest in this category rather than treating it as an afterthought?

InterContinental Hotels and Resorts was selected as the subject because it provides the cleanest possible test of operational consistency. It operates as a single luxury brand with global distribution, managed and franchised under common brand standards. The properties share a name, a booking infrastructure, a loyalty programme, and a brand promise. Any variation in dog friendly performance within this brand is therefore not attributable to brand segmentation, market positioning, or price tier. It is attributable to operational decisions made at property level. That makes InterContinental an ideal controlled environment for isolating the factors that drive performance in this category.

Methodology

All 30 InterContinental properties were assessed in December 2025 using the Roch Dog Friendly Standard (RDFS-02). This is the same framework applied across a global dataset of approximately 2,000 hotels. Approximately half met minimum evaluation requirements and were ranked. The remainder did not meet the baseline criteria for inclusion and were excluded from the ranked dataset.

The framework evaluates hotels across four categories: pet policy (fees, weight limits, restrictions), access (rooms, public areas, outdoor spaces), amenities (beds, food, bowls, services), and overall guest experience (staff training, dedicated programmes, operational integration). Each hotel is scored on a points based system derived from 31 weighted survey questions. Scores are converted to letter grades using fixed thresholds:

Grade	Score Range	Interpretation
A+	Above 45	Exceptional. Fully integrated dog friendly programme
A	36 to 45	Strong. Comprehensive amenities and access
B	26 to 35	Good. Solid offering with some gaps
C	21 to 25	Adequate. Meets basic expectations
D	11 to 20	Below standard. Significant gaps in experience
F	10 or below	Unsatisfactory. Minimal to no meaningful dog friendly provision

Of the 30 InterContinental properties assessed, 23 met minimum evaluation requirements and received a score and grade. Seven properties did not meet the minimum criteria for a full evaluation and are listed separately.

SECTION 4

Portfolio Overview

4.1 Full Property Leaderboard

The following table presents all 30 assessed InterContinental properties, ranked by score.

#	Property	Score	Grade	Pet Fee	Weight Limit
1	InterContinental Miami	55	A+	\$100 per stay	No limit
2	InterContinental New York Barclay	39	A	Dogs stay free	50 lbs
3	InterContinental Washington Willard	34	B	\$200 per stay	40 lbs
4	InterContinental Rome Ambasciatori Palace	32	B	EUR 25/35 per day + EUR 70 cleaning	No limit
5	InterContinental Kansas City At The Plaza	29	B	\$125 per stay	No limit
6	InterContinental Geneva	26	B	CHF 30 per day	No limit
7	InterContinental Porto Palacio das Cardosas	25	C	EUR 30 per day	33 lbs
8	InterContinental Lisbon	25	C	EUR 40 per day	44 lbs
9	InterContinental Buckhead Atlanta	25	C	\$100 per stay	70 lbs
10	InterContinental San Antonio	20	D	\$75 per stay	No limit
11	InterContinental Los Angeles Downtown	16	D	\$125 per stay	40 lbs
12	InterContinental Montreal	16	D	\$40 per night	No limit
13	InterContinental New Orleans	15	D	\$150 per stay	No limit
14	InterContinental Boston	15	D	\$150 per stay	80 lbs
15	InterContinental Hotel Minneapolis	14	D	\$50 per night	No limit

16	InterContinental Houston	13	D	\$150 per stay	50 lbs
17	InterContinental Chicago Magnificent Mile	12	D	\$125 per stay	50 lbs
18	InterContinental Mark Hopkins San Francisco	12	D	Dogs stay free	50 lbs
19	InterContinental San Francisco	10	F	\$100 per stay	50 lbs
20	InterContinental Washington D.C. The Wharf	8	F	\$250 per stay	25 lbs
21	InterContinental New York Times Square	5	F	\$250 per stay	75 lbs
22	InterContinental Toronto Centre	4	F	\$50 per stay	50 lbs
23	InterContinental San Diego	-1	F	\$150 per stay	70 lbs
--	<i>7 additional properties assessed</i>	--	DNM	--	--

DNM = Did Not Meet minimum evaluation requirements under RDFS-02

4.2 Grade Distribution

Grade	Count	Percentage of Ranked (23)	Percentage of Assessed (30)
A+	1	4%	3%
A	1	4%	3%
B	4	17%	13%
C	3	13%	10%
D	9	39%	30%
F	5	22%	17%
Did Not Meet Standard	7	--	23%

The combined D, F, and DNM rate is 21 out of 30 properties, or 70%. Only six properties (20%) scored B or above.

4.3 Context Within the Broader Dataset

To understand whether this distribution is specific to InterContinental or reflective of the wider industry, it is useful to compare against the full global dataset.

Metric	InterContinental (23 ranked)	Global Dataset
Average score	19.3	21.3
D+F rate	61%	49%
A+ rate	4.3% (1 property)	1.0%
Score range	-1 to 55	-1 to 62

InterContinental's average score of 19.3 sits below the global dataset average of 21.3. Its D and F rate of 61% is materially worse than the global average of 49%. The brand's one A+ property places it in rare company, given that only 1% of hotels globally achieved that grade, but this performance is concentrated in a single property rather than distributed across the portfolio.

SECTION 5

Key Findings

5.1 Lack of Standardisation

The 57 point scoring spread between the highest and lowest performing InterContinental properties is the most significant finding in this study. This range exists within a single luxury brand operating under common brand standards. It is wider than the spread observed within comparable luxury brand groups in the dataset.

For reference, consider the performance of other luxury brands assessed under the same framework:

Brand Group	Hotels Assessed	Average Score	D+F Rate	F Grade Count
Four Seasons	12	29.3	17%	0
Kimpton (IHG owned)	22	29.4	23%	0
Fairmont	20	25.9	30%	1
InterContinental	23	19.3	61%	5
Hyatt (all brands)	31	16.4	74%	6

InterContinental ranks below Four Seasons, Kimpton, and Fairmont on every metric. It produces five F grades where Four Seasons and Kimpton produce none. The Kimpton comparison warrants particular attention and is examined in Section 5.5.

5.2 Policy Inconsistency

Pet fees across the 23 ranked InterContinental properties range from free (New York Barclay, Mark Hopkins San Francisco) to \$250 per stay (Washington D.C. The Wharf, New York Times Square). Weight limits range from no restriction to 25 pounds. There is no observable correlation between fee level and service quality. The two properties that charge the highest fees (\$250) both scored F. The property with no fee at all (New York Barclay) scored A.

This pattern suggests that fee levels in the lower performing properties function as deterrent pricing rather than as revenue generation tied to a service commitment. A guest paying \$250 at InterContinental Washington D.C. The Wharf receives a score of 8 out of a possible 62 points. A guest paying \$100 at InterContinental Miami receives a score of 55. The fee is 2.5 times lower and the experience is 6.9 times better.

5.3 The Experience Gap

The distinction between permission and hospitality defines the performance gap across this portfolio. Lower performing properties permit dogs under constrained conditions: limited room categories, restricted common area access, weight and size limits, and no dedicated amenities. Higher performing properties integrate dogs into the guest experience: open access across the property, real food and water bowls, dog walking services, dog sitting arrangements, staff training, and dedicated programming.

This is not a cosmetic difference. It determines whether guests perceive the property as genuinely welcoming or merely tolerating their dog. That perception drives booking behaviour, repeat stays, and willingness to spend on ancillary services during the stay.

5.4 A Best in Class Model Exists Within the Portfolio

InterContinental Miami demonstrates that high performance is achievable within IHG's existing operating framework. Its score of 55 places it in the top 1% of all hotels in the global dataset. It achieves this through a combination of broad access (dogs welcome in public areas, gardens, and most room categories), meaningful amenities (real bowls, beds, food for purchase, walking and sitting services), and operational integration (staff training, dedicated dog programming, no weight limit). Its fee of \$100 per stay is below the portfolio median. This property proves that the constraint is not brand architecture or ownership model. The constraint is operational commitment at property level.

5.5 The Kimpton Paradox: IHG Already Owns the Playbook

The most significant comparative finding in this study does not come from outside IHG. It comes from within.

Kimpton Hotels and Restaurants is an IHG brand. It operates under the same parent company, the same corporate leadership, and the same ownership and franchise infrastructure as InterContinental. Twenty two Kimpton properties were assessed under the identical RDFS-02 framework. The results are as follows:

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

Kimpton averages 52% higher than InterContinental. It produces zero F grades. Its scoring spread is half as wide, indicating substantially more consistency across properties. This is not a comparison between two competing companies. This is a comparison between two brands within the same company.

The implication is that IHG already possesses the operational knowledge, guest experience framework, and brand management capability to deliver consistent dog friendly hospitality. Kimpton demonstrates this. The question is why that capability has not been transferred, adapted, or enforced within the InterContinental brand.

5.6 External Benchmark: Red Carnation Hotels

Red Carnation Hotels provides a further external reference point. This independent luxury hotel group, recognised globally as one of the leading dog friendly hospitality brands, has built dog friendly service into its brand identity at a structural level. Two Red Carnation properties assessed under the same framework, Egerton House in London (45 points, A) and Summer Lodge Country House Hotel in Dorset (40 points, A), both outperform every InterContinental property except Miami. Their average score of 42.5 is more than double InterContinental's portfolio average of 19.3.

Red Carnation treats dog friendliness as a brand standard, not a property level option. Every property in the group operates under consistent policies, consistent amenities, and consistent staff training. The result is reliability: a guest booking any Red Carnation property can expect a comparable level of dog friendly service. A guest booking an InterContinental property cannot. This is the operational difference between a brand that has made a strategic commitment to this category and one that has not.

5.7 Operational Feasibility: The Downside Objection

The most common objection to structured dog friendly programmes is the perceived operational downside: hygiene concerns, property damage, guest complaints, and the general belief that welcoming dogs creates more problems than it solves. The data contradicts this at every level.

Hotels that expect dogs and build operational protocols around their presence maintain better hygiene outcomes than hotels that are ambushed by unauthorized pets. Every hotel of scale has guests who smuggle dogs into rooms regardless of policy. The difference is that a property with professional cleaning protocols, enzymatic cleaners, and HEPA air purification systems handles this as routine maintenance. A property without those systems discovers the problem after checkout, deals with it reactively, and absorbs the cost without any offsetting revenue from the dog owning segment.

The investment required to move a property from F grade performance to B grade performance is between \$50,000 and \$100,000. This covers policy redesign, basic amenity procurement (beds, bowls, food stock), public area access modifications, and local service partnerships for walking and sitting. Monthly ongoing costs break down to approximately \$1,800 for specialized cleaning, \$1,200 for liability insurance, and \$500 for amenity provision. Staff training is a one time investment of approximately \$3,500. At the base case revenue figure of \$2.3 million per year, this represents a 23x to 46x annual return on investment, with revenue building over 6 to 12 months as bookings, reviews, and return visits accumulate. The monthly operating cost of \$3,500 is recovered in less than half a day of incremental revenue at the annualised rate. These are not marginal economics. They are among the highest return on investment opportunities available to a luxury hotel operator.

SECTION 6

Revenue Analysis

6.1 Model Assumptions

The following revenue model is based on a representative luxury hotel with characteristics aligned to the InterContinental portfolio. All assumptions are stated explicitly and can be adjusted for individual property modelling.

Baseline Property Profile:

Assumption	Value	Basis
Room count	250	Median for InterContinental portfolio (actual range: 24 to 890)
Average daily rate (ADR)	\$350	Consistent with IHG luxury segment pricing
Baseline occupancy	70%	Industry standard for urban luxury hotels
Occupied room nights per year	63,875	250 rooms x 365 days x 70%
Baseline annual room revenue	\$22,356,250	63,875 nights x \$350 ADR

Incremental Revenue Assumptions:

Assumption	Value	Basis
Occupancy lift from dog owners	5%	Conservative. 78% of dog owners travel with their dogs. A property that actively welcomes this segment captures bookings lost by restrictive competitors
Ancillary spending premium	30%	Industry research consistently shows dog owning guests spend 30% more on food, beverage, spa, and room service
Base ancillary spend per night	\$350	Consistent with luxury hotel F&B and ancillary revenue per occupied room night
Average pet fee	\$50	Conservative mid range. Actual IHG fees range from \$0 to \$250

6.2 Revenue Calculation

The model calculates incremental revenue in four stages, each building on the occupancy lift assumption.

The occupancy lift of 5% applied to 250 rooms across 365 days produces 4,563 additional room nights per year. At the baseline ADR of \$350, those additional nights generate \$1,597,050 in incremental room revenue.

Dog owning guests spend 30% more on ancillary services. On a base of \$350 per night in ancillary spending, the incremental portion is \$105 per night. Across 4,563 additional nights, this produces \$479,115 in incremental ancillary revenue. For cross validation: a property generating \$5 million annually in food and beverage revenue, capturing 10% of room nights from dog owners at the 30% spending premium, yields \$150,000 in incremental F&B revenue alone. The \$479,115 figure includes F&B, spa, room service, minibar, and other on property spend.

Pet fee revenue at \$50 average across 4,563 additional nights produces \$228,150.

Revenue Stream	Annual Value
Incremental room revenue (5% occupancy lift)	\$1,597,050
Incremental ancillary revenue (30% spending premium)	\$479,115
Pet fee revenue (\$50 average)	\$228,150
Total incremental revenue per property	\$2,304,315

This represents a 10.3% increase over baseline room revenue of \$22.4 million.

6.3 Sensitivity Analysis

Revenue projections vary based on fee structure and the degree of occupancy lift achieved. The table below models five scenarios ranging from conservative to fully optimised assumptions.

Scenario	Occupancy Lift	Pet Fee	Total Incremental Revenue
Conservative	3%	\$50	\$1,382,589
Base case	5%	\$50	\$2,304,315
Mid range	5%	\$100	\$2,532,465
Upper range	7%	\$100	\$3,545,451
Optimised	7%	\$150	\$3,865,251

Even under the most conservative assumptions, a 3% occupancy lift with a \$50 fee still produces \$1.4 million in incremental annual revenue per property. The gap between conservative and optimised scenarios reflects the compounding effect of higher occupancy paired with fee structures that capture more of the value created by the guest experience.

6.4 Portfolio Scale

Applied across the 14 InterContinental properties that scored D or F, the base case model implies \$32.3 million in unrealised annual revenue across just the underperforming portion of the portfolio. If the seven properties that did not meet evaluation requirements are included, the figure rises to approximately \$48.4 million.

The investment required to move from D/F performance to B or above is not capital intensive. It involves policy changes (removing unnecessary weight limits and fee deterrents), operational additions (dog beds, bowls, walking routes, staff awareness training), and programmatic development (dedicated dog friendly packages, partnerships with local dog services). For most properties, the cost of implementation sits between \$50,000 and \$100,000, representing a 23x to 46x annual return on investment at the base case revenue rate, with revenue building over the first 6 to 12 months.

Structural Causes

The variation observed in this study is not random. It reflects specific structural conditions within IHG's operating model.

InterContinental hotels operate under a mix of ownership structures: some are fully owned and managed by IHG, others are franchised, and others are managed by third party operators under the IHG brand. Dog friendly policies are not enforced at brand level. Individual properties set their own pet policies, fees, weight limits, and amenity provisions. This means that the InterContinental brand name provides no reliable signal to guests about what level of dog friendly service they will receive.

This is compounded by the absence of measurement. Without a framework for evaluating dog friendly performance, neither IHG corporate nor individual property managers have a benchmark against which to assess or improve their operations. What gets measured gets managed. Dog friendly hospitality, across this portfolio, is not being measured.

The Kimpton comparison (Section 5.5) challenges the argument that decentralised ownership makes standardisation impossible. Kimpton operates under the same parent company and the same franchise and management structures, yet its scoring spread is 28 points compared to InterContinental's 57. Kimpton's consistency suggests that the difference is not structural but strategic: one brand has chosen to enforce standards in this category, and the other has chosen not to.

The result across the InterContinental portfolio is predictable: properties with motivated general managers or owners who see the commercial opportunity invest in the category and perform well. Properties without that motivation default to the minimum: a token pet policy, a deterrent fee, and no operational commitment. The brand tolerates both approaches equally.

SECTION 8

Comparative Insight: Top vs Bottom Performers

The summary table below captures the operational gap between the top and bottom of this portfolio. But the numbers alone do not convey the scale of what is happening inside these properties. That requires examining what each hotel actually provides, question by question, and understanding what that means for the guest who walks through the door with a dog.

Dimension	Top Performers (A+/A)	Bottom Performers (F)
Pet fee	\$0 to \$100 per stay	\$100 to \$250 per stay
Weight limit	No limit or generous (50+ lbs)	25 to 70 lbs
Room access	Most or all room categories	Limited categories
Common area access	Lobby, bar, restaurant, garden	Rooms only or rooms plus limited corridor access
Amenities provided	Beds, bowls, food, treats, walking services	None or minimal (sometimes a bowl on request)
Staff training	Documented canine guest protocols	No documented protocols
Positive criteria met	19 out of 31	2 to 4 out of 31
Average score	47.0	5.2

8.1 InterContinental Miami: What A+ Looks Like

InterContinental Miami (55 points, A+) answered Yes to 19 of the 31 evaluation criteria. That is not a number to skim past. It means this property has made a positive, affirmative operational decision on nearly two thirds of the entire evaluation framework. It provides access to the bar, terrace, public lounge, and garden. Dogs can stay in the room unaccompanied, which matters enormously to guests who want to go to the gym, the spa, or dinner without worrying about their dog being alone in a strange environment. There is no weight limit, which means a guest with a Labrador or a German Shepherd is as welcome as a guest with a Chihuahua.

The amenity provision goes well beyond the basics. Miami sells dog food on property, provides real food and water bowls (not disposable plastic), offers free treats, publishes walking route guidance for the local area, provides professional dog walking services, arranges

third party dog sitting, runs regular dog friendly activities, has won dog friendly awards, has received dog friendly media coverage, supports a canine charity, and maintains an emergency vet contact number at the front desk.

Its fee of \$100 per stay sits below the portfolio median. This is significant. Miami does not charge more for a better experience. It charges less. The property has made a strategic decision to treat dog owning guests as a high value segment worth investing in, and the experience it delivers reflects that decision at every operational level. This is not a hotel that tolerates dogs. It is a hotel that has built a structured, integrated programme around them, and it demonstrates what is possible within IHG's existing brand architecture.

8.2 The F Rated Properties: What the Bottom Looks Like

The contrast with the five F rated properties is not subtle. It is a different category of hospitality entirely.

InterContinental San Diego (-1 points, F) answered Yes to 2 of the 31 criteria: proximity to green spaces and provision of poop bags. That is the entire positive offering. No bar access. No lounge access. No garden access. No terrace access. No dog bed. No bowls. No food. No treats. No walking services. No sitting services. No route guidance. No activities. No events. No staff training. No charity support. No emergency vet number. The property imposes a 70 pound weight limit, charges \$150, and requires a damage deposit. The weight restriction and damage deposit both carry penalty weightings in the scoring framework, which is why San Diego's two positive answers are not enough to produce a positive score. The penalties offset them entirely, resulting in a score of negative one. This property does not merely underperform. Its policies actively penalise the guest for arriving with a dog.

InterContinental New York Times Square (5 points, F) offers most rooms as dog friendly, which is a positive structural decision, but then provides nothing else. No bar access, no lounge access, no garden, no terrace, no dedicated dog space, no dog shower. No dog bed, no bowls, no food, no treats, no walking services, no sitting services, no route guidance, no activities, no events, no staff training, no awards, no media coverage, no charity support, no emergency vet contact. The fee is \$250 per stay, the joint highest in the portfolio. A guest pays \$250 and receives access to a room. That is the full extent of the dog friendly experience at this property. Two of the 31 evaluation criteria are met.

InterContinental Washington D.C. The Wharf (8 points, F) presents a particular problem. It imposes a 25 pound weight limit, which is the most restrictive in the entire portfolio. To put this in practical terms, a 25 pound limit excludes Labradors, Golden Retrievers, German Shepherds, Border Collies, Boxers, Huskies, Standard Poodles, and the vast majority of mixed breed dogs. These are among the most common dog breeds in the United States. A guest travelling with any medium or large dog cannot stay at this property, regardless of their willingness to pay the \$250 fee, regardless of their IHG Rewards status, and regardless of the property's position within a luxury brand. Three of 31 criteria are met. The

policy is not restrictive. It is exclusionary.

InterContinental Toronto Centre (4 points, F) restricts dogs to a few designated rooms, imposes a 50 pound weight limit, and requires a damage deposit. It provides a dog bed and real bowls, which is more than some F rated properties offer, but that provision is undermined by the absence of everything else: no public area access, no food, no treats, no walking services, no sitting services, no staff training, no activities, no events, no charity partnerships, no emergency vet number. The damage deposit is particularly telling. It communicates to the guest, before they have even arrived, that the property expects their dog to cause damage. This is risk management language, not hospitality language, and it sets the tone for the entire stay.

InterContinental San Francisco (10 points, F) sits right on the boundary between F and D. It provides a dog bed, real bowls, and free treats, which represents more amenity provision than the other F properties. But it imposes a 50 pound weight limit, charges \$100, and provides no public area access, no walking services, no sitting, no food for sale, no route guidance, no activities, and no staff training. The treats and bowls are a gesture, but they exist within a framework otherwise indistinguishable from the lowest performing properties in this portfolio.

8.3 The Access Divide

The pattern that emerges from this criteria level comparison is that access to public areas is one of the clearest indicators of whether a property has made a genuine operational commitment to dog friendly hospitality or is simply processing a permission.

Miami provides access to the bar, terrace, public lounge, and garden. Every F rated property restricts dogs to rooms only, with the partial exception of Washington D.C. The Wharf, which allows lounge access but pairs it with a 25 pound weight limit that renders the access meaningless for most guests. New York Times Square, a 607 room property in one of the most visited tourist destinations in the world, provides zero public area access for dogs.

This matters because access determines how the guest actually experiences the hotel. A guest whose dog is confined to the room cannot use the lobby bar. They cannot eat in the restaurant. They cannot work in the lounge. They cannot relax on the terrace. They are functionally segregated from the core hotel experience. They pay a luxury rate, but they receive a constrained version of the stay. They order room service instead of dining in the restaurant. They skip the bar. They spend less time in the property and more time outside it.

The revenue implication is direct. The property captures the room revenue but forfeits the ancillary spend that comes from a guest who feels genuinely welcome throughout the building. A guest who can sit in the bar with their dog orders drinks, food, and stays longer. A guest who cannot sit in their room and orders nothing. This is the mechanism through which restrictive access policies directly suppress the 30% spending premium documented in Section 6. The money does not disappear. It goes to the restaurant down the street, the cafe on the corner, or the competing hotel that would have let the guest sit in the lobby.

The pattern across all 23 ranked properties is consistent. Properties scoring above 25 points share broader room availability, fewer restrictions, some amenity provision, and partial or full public area access. Properties scoring below 15 share restrictive weight limits, no amenities, room only access, and fees positioned to discourage rather than facilitate. The threshold between these two groups is not primarily about budget. It is about whether the property has made a decision to welcome dogs or merely to allow them.

8.4 The Fee Inversion and the Margin Multiplier Effect

The fee structure across this portfolio inverts the expected relationship between price and value, and the inversion is extreme.

The two properties charging the highest fees (\$250 per stay) are InterContinental New York Times Square and InterContinental Washington D.C. The Wharf. They score 5 and 8 respectively. The two properties charging no fee at all are InterContinental New York Barclay and InterContinental Mark Hopkins San Francisco. They score 39 and 12. InterContinental Miami, the highest performing property in the entire portfolio, charges \$100.

Consider what this means in practice. A guest paying \$250 at Washington D.C. The Wharf receives a score of 8 out of a possible 62 points. A guest paying \$100 at Miami receives a score of 55. The fee is 2.5 times lower and the measured experience is 6.9 times better. In no other dimension of luxury hospitality would a brand tolerate this degree of price to value inversion within a single portfolio. If a guest paid 2.5 times more for a room and received a room 6.9 times worse, the brand would intervene. In the dog friendly category, no intervention occurs because no measurement exists to trigger one.

The high fees at the bottom of this portfolio do not fund services. They fund nothing. There are no walking services to staff. There is no food to stock. There are no amenities to maintain. The fee exists purely as friction, designed to limit the number of guests who arrive with dogs. It is a deterrent positioned as a charge. This is a rational approach if you view dogs as a liability to be managed. It is fundamentally incompatible with the revenue data.

What makes this particularly irrational is what can be called the Margin Multiplier Effect. A luxury hotel carries fixed overhead, facility leases, utilities, core staffing, insurance, that can reach \$50,000 per month or more regardless of occupancy. These costs do not change whether the hotel runs at 65% or 75% occupancy. Every dollar of revenue from dog owning guests above variable costs flows directly to the bottom line. The incremental margin on a dog owning guest who books a room that would otherwise sit empty, orders dinner in the restaurant, and extends their stay by a night is almost entirely profit. The properties charging \$250 deterrent fees are not protecting their margins. They are destroying them. They are turning away the highest margin guests in their pipeline in exchange for a fee that, on the rare occasion it is actually collected, generates less revenue than a single night of ancillary spending from a guest who feels welcome.

The properties that charge the most earn the least from the dog owning segment, because the fee discourages the bookings that would generate the ancillary revenue.

8.5 The Operational Intent Gap

The distinction that runs through every comparison in this section is not between expensive and affordable, large and small, urban and resort. InterContinental Miami has 653 rooms. InterContinental New York Times Square has 607. Both are large, urban, luxury properties in major American cities. One scores 55. The other scores 5.

The distinction is between operational intent and operational tolerance. Miami has decided to serve dog owning guests as a distinct, valuable segment and has built systems, amenities, partnerships, vendor relationships, and recurring programming to do so. It has invested in the category, measured the results, and continued to invest. San Diego has decided to permit dogs under constrained conditions, charged a fee for the privilege, and built nothing around it. The fee is the entire strategy.

This gap is not a matter of opinion. It is measurable. Miami meets 19 of 31 criteria. San Diego meets 2. The gap is 17 operational decisions that one property has made and the other has not. Each of those decisions, providing bowls, selling food, arranging walking services, allowing garden access, training staff, keeping a vet number on file, represents a small investment and a small signal to the guest that they and their dog are welcome. Collectively, they represent the difference between a score of 55 and a score of negative one.

Within IHG's own portfolio, Kimpton provides a counterpoint that makes this distinction even sharper. Kimpton maintains uniform, fee free, no restriction policies across every property in its portfolio. No Kimpton property charges a pet fee. No Kimpton property imposes a weight limit. No Kimpton property requires a damage deposit. The resulting B level consistency, with an average score of 29.4 and zero F grades across 22 properties, delivers the predictability that the InterContinental portfolio currently lacks. A guest booking any Kimpton property anywhere in the world knows what to expect. A guest booking an InterContinental property is making a bet, and the data in this study shows that the odds are not in their favour: there is a 61% chance they will receive a D or F experience.

For a luxury brand, this reduces consistency. In hospitality, consistency is the foundation of brand trust.

Industry Implications

This study uses InterContinental as a controlled case study because a single brand portfolio provides the cleanest possible test of operational consistency. But the patterns it documents extend well beyond IHG. Across the broader global dataset, 49% of ranked hotels scored D or F. Only 9.5% achieved A or A+. The term "pet friendly" does not, in its current usage, provide a reliable signal of actual performance. A hotel that scores 55 and a hotel that scores negative one can both accurately, and legally, describe themselves as pet friendly. The label carries no standardised meaning, no minimum threshold, and no accountability. It is, at present, a marketing term with no operational definition.

This section examines what that means for the wider hotel industry.

9.1 The Market Is Moving Faster Than the Industry

The market context elevates these findings from academic observation to commercial urgency. Over 50% of global pet owners seek accommodations that welcome their animals when they travel. Dogs represent approximately 90% of that demand. In major urban markets, 46% of hotels now describe themselves as dog friendly. These numbers have been moving in one direction for the past decade, and there is no indication that the trajectory is changing.

Dog ownership rates have increased in every major travel market since 2015. The proportion of dog owners who travel with their dogs has risen in parallel. In the United States, 78% of dog owning households report travelling with their dog. In the United Kingdom, the figure is comparable. In Europe, where cultural attitudes toward dogs in public spaces are generally more accommodating, the proportion is higher still.

The spending behaviour of these travellers is equally well documented. Dog owning guests book more frequently than non dog owning guests. They stay longer. They spend 30% more on food, beverage, spa, and ancillary services per stay. They demonstrate higher loyalty to properties that serve them well, returning to hotels that have earned their trust with consistent, genuine dog friendly service. They are, by every standard measure, a high value guest segment.

The implication for hotel groups is that dog friendly hospitality is no longer a novelty amenity or a niche offering. It is an emerging category of guest experience with measurable revenue characteristics that scale with the broader growth of dog ownership and travel. The segment is approaching a tipping point where dog friendly provision shifts from competitive differentiator to baseline expectation. Hotels unprepared for that shift will find themselves at a structural disadvantage. The brands treating this category as an afterthought, as the majority of InterContinental properties in this study demonstrably do, are leaving money on the table in a segment that is becoming impossible to ignore.

9.2 The Brand Reliability Problem

When a guest books a room at an InterContinental hotel, they are relying on the brand to deliver a predictable level of quality. This is the fundamental promise of a hotel brand: consistency. The guest expects that an InterContinental in New York will deliver a broadly comparable experience to an InterContinental in Miami or an InterContinental in Rome. This expectation holds for room quality, service standards, lobby experience, and food and beverage. It does not hold for dog friendly hospitality.

A guest choosing an InterContinental property based on the brand's general reputation has no way to predict whether they will receive a 55 point experience or a negative one point experience. The brand name provides no signal. The website may describe the property as pet friendly, but that description encompasses everything from Miami's 19 criteria programme to San Diego's 2 criteria absence of one. The guest discovers the actual experience on arrival, by which point they have already committed to the booking, the fee, and the stay.

This is true across most hotel brands assessed in the global dataset. The variance within brands routinely exceeds the variance between them. A guest would be better served choosing a random Kimpton property than the best performing Hyatt, but they have no way of knowing this because the industry does not publish comparable performance data.

Only brand groups that enforce dog friendly standards at portfolio level deliver consistent results. Two models demonstrate this, and they are instructive because they operate under fundamentally different structures.

Red Carnation Hotels operates as an independent luxury group with centralised brand control. It is not a franchise. Every property is directly managed under a unified brand philosophy. Red Carnation has made dog friendly hospitality a core part of its brand identity, not an optional add on. Every property in the collection maintains consistent dog friendly policies, consistent amenities, and consistent service standards. The two properties assessed under RDFS-02, Egerton House in London (45 points, A) and Summer Lodge Country House Hotel in Dorset (40 points, A), both outperform every InterContinental property except Miami. Their average score of 42.5 is more than double InterContinental's portfolio average of 19.3. The consistency is the point. A guest booking any Red Carnation property can expect a comparable, high quality dog friendly experience because the brand has decided that this is a non negotiable standard.

Kimpton Hotels and Restaurants operates under an entirely different model. It is a franchise brand within a global corporation, IHG. It manages 22 assessed properties across multiple countries, operated by different owners and management companies. Despite this structural complexity, Kimpton maintains uniform, fee free, no restriction policies across its entire portfolio. No Kimpton property charges a pet fee. No Kimpton property imposes a weight limit. No Kimpton property requires a damage deposit. The result is zero F grades, an average score of 29.4, and a scoring spread of 28 points, half the width of InterContinental's 57.

These two examples prove the same point from opposite directions. Red Carnation achieves consistency through ownership control. Kimpton achieves it through brand standards enforced within a franchise model. The mechanism differs but the outcome is identical: the guest can rely on the brand promise. This demonstrates that consistency in dog friendly hospitality is achievable regardless of ownership structure. It is a function of strategic priority, not organisational design. Any hotel group that claims decentralised ownership makes dog friendly standardisation impossible is contradicted by Kimpton's own results.

9.3 The Franchise Infrastructure Gap

The franchise and management company model creates a structural challenge that the hotel industry has not yet addressed in the dog friendly category, even though it has addressed comparable challenges in virtually every other category of guest experience.

Consider breakfast. A Holiday Inn Express in Dallas and a Holiday Inn Express in London deliver broadly comparable breakfast experiences. The menu is defined by the brand. The quality standards are specified. The presentation is documented. Properties are inspected against these standards. Non compliance has consequences. The result is that a guest booking a Holiday Inn Express anywhere in the world has a reasonable expectation of what breakfast will look like. This did not happen by accident. It happened because IHG decided that breakfast consistency mattered to the brand promise, invested in defining what that meant operationally, and built the infrastructure to enforce it.

Now consider dog friendly hospitality. There are no brand mandated minimum amenities for dogs at InterContinental properties. There are no specified policies on weight limits, fee levels, or access. There are no inspection criteria for dog friendly services. There are no compliance mechanisms for pet policy consistency. There is no framework for evaluating whether a property's dog friendly offering meets any defined standard. Properties operate independently, and performance varies accordingly. The result is that a brand with 30 properties produces a 57 point scoring spread and five F grades without any internal mechanism to detect, measure, or correct the problem.

This is not a failure of intent. IHG may well regard dog friendly hospitality as important. But it is a failure of infrastructure. The tools, processes, and accountability mechanisms that ensure breakfast consistency, room quality consistency, and brand presentation consistency have simply never been extended to this category. The category has been left to property level discretion, and the data shows exactly what property level discretion produces when it is not guided by standards: a portfolio where 70% of properties underperform.

9.4 The Revenue Opportunity at Industry Scale

The revenue analysis in Section 6 models a single InterContinental property. But the opportunity is not limited to one brand. Every hotel group with properties scoring D or F in the global dataset faces the same arithmetic: a high spending guest segment that they are either serving poorly or actively deterring.

The spending behaviour of dog owning travellers is not speculative. It is documented across multiple markets and property types. They book more frequently because they have fewer options. They stay longer because finding a genuinely welcoming property is difficult and they value it when they find one. They spend more on food, beverage, spa, and ancillary services because they tend to spend more time on property when they feel their dog is welcome throughout the building. They demonstrate higher loyalty because the switching cost of finding another property that truly welcomes their dog is high. Every one of these behaviours translates directly into revenue for properties that invest in serving this segment.

The IHG portfolio alone represents an estimated \$48 million in unrealised annual value across its underperforming InterContinental properties. Extrapolated across the broader dataset, where 49% of ranked hotels score D or F, the industry wide figure runs into the hundreds of millions. This is not a niche opportunity confined to boutique hotels or rural retreats. It applies to urban luxury properties, convention hotels, resort properties, and everything in between. The properties in this study that have invested in dog friendly programmes, notably Miami, demonstrate that the revenue is real and the investment is modest. The properties that have not invested demonstrate the cost of inaction: lower occupancy from the dog owning segment, no spending premium capture, and fee revenue that is offset by the bookings the fee discourages.

9.5 Measurement as the Lever

Every finding in this study was made possible by measurement. Without a consistent framework applied across all 30 properties, the variation would be invisible. Individual properties would continue to set their own policies, charge their own fees, and deliver their own level of service without any basis for comparison. The brand would have no way to identify that Miami is performing at A+ level, that San Diego is performing at negative one, or that the gap between them represents tens of millions of dollars in unrealised revenue.

Measurement is not a theoretical benefit. It is the operational mechanism through which improvement becomes possible. The properties in this study that scored highest are not structurally different from those that scored lowest. They operate under the same brand, in similar markets, at similar price points, within the same ownership and management structures. The difference is that some have made operational decisions to invest in the category and others have not. A standardised evaluation framework makes those decisions visible, makes the financial consequences quantifiable, and makes the path to improvement specific and actionable.

IHG's own data proves this more convincingly than any external comparison could. IHG already operates a brand, Kimpton, that outperforms InterContinental by 52% on average score with zero F grades across 22 properties. The knowledge of how to build a consistent dog friendly brand experience exists within the organisation. The operational playbook exists. The guest experience framework exists. The brand management infrastructure exists. What is missing is the decision to apply it to InterContinental.

This is not unique to IHG. Across the broader dataset, comparable patterns of underperformance appear in Hyatt (31 properties, average score 16.4, 74% D+F rate), Hilton (10 properties, average score 19.5, 60% D+F rate), and Marriott branded hotels (6 properties, average score 8.7, 100% D+F rate). The industry as a whole has not yet applied consistent measurement to dog friendly hospitality. The brands that establish and enforce measurable standards will be positioned to capture a growing segment. Those that leave execution to property discretion will continue to produce the variance documented here, and they will continue to forfeit the revenue that variance represents.

9.6 Global Market Context

The findings in this study are drawn primarily from North American and European properties, but the market opportunity they describe is global. North America currently holds approximately 42% of the dog friendly hotel market share, reflecting both the size of its dog owning population and the maturity of its travel infrastructure. But the fastest growth is elsewhere.

Asia Pacific is the fastest growing region for dog friendly hospitality, expanding at a compound annual growth rate of 10.29% through 2031. Rising urban dog ownership in markets like Japan, South Korea, Australia, and increasingly China and India is creating demand that the hotel industry in those regions has barely begun to serve. In EMEA, 47% of travellers now cite pet friendliness as a critical factor in their accommodation decisions. These are not aspirational numbers. They represent current booking behaviour in markets where dog friendly provision remains the exception rather than the rule.

This global context transforms the Roch Dog Friendly Standard from a local certification tool into a global benchmark. The same framework that revealed a 57 point spread within a single luxury brand in North America can be applied identically in Tokyo, Sydney, Dubai, or Sao Paulo. The measurement methodology is language agnostic, currency agnostic, and ownership model agnostic. As dog friendly hospitality grows from a North American and European phenomenon into a global expectation, the brands and properties that can demonstrate certified performance against a recognised standard will hold a structural advantage over those that cannot. The question of whether a hotel is genuinely dog friendly, or merely claims to be, is about to become a global conversation. The data infrastructure to answer it already exists.

Conclusion

This study set out to answer a straightforward question: how much variation in dog friendly performance exists within a single luxury hotel brand when assessed under a consistent framework? The answer is that it varies by 56 points within a portfolio of 30 properties, from a score of 55 (A+) at InterContinental Miami to negative one (F) at InterContinental San Diego. That is not a gap. It is a chasm. It is wider than the variation between most competing brands, and it exists entirely within one.

Of the 30 InterContinental Hotels and Resorts properties evaluated in December 2025, seven did not meet the minimum evaluation requirements of the Roch Dog Friendly Standard (RDFS-02). Of the 23 that qualified for ranking, 14 scored D or F. Combined, 21 of 30 properties, a full 70% of the assessed portfolio, either failed the standard or scored in the bottom two performance tiers. Only six properties scored B or above. Only two scored A or higher. The complete leaderboard, with scores, grades, fees, and weight limits for every property, is presented in Section 4.

What the Data Reveals

The variance documented in this study is not random. It maps directly to operational decisions made at property level. InterContinental Miami met 19 of 31 evaluation criteria. It provides access to the bar, terrace, public lounge, and garden. It sells dog food, provides real bowls, offers walking and sitting services, runs dedicated programming, supports a canine charity, and maintains an emergency vet contact. Its fee of \$100 per stay sits below the portfolio median. This is a property that has made a deliberate investment in serving dog owning guests as a distinct and valuable segment.

InterContinental San Diego met 2 of 31 criteria. It provides no services, no public area access, and no amenities. It imposes a 70 pound weight limit, charges \$150, and requires a damage deposit. It scored negative one, meaning the penalties for its restrictions outweighed any positive provision entirely. InterContinental New York Times Square met 2 of 31 criteria and charges \$250, the highest fee in the portfolio, for an experience that scores 5 out of a possible 62. InterContinental Washington D.C. The Wharf imposes a 25 pound weight limit that excludes the majority of common dog breeds, charges \$250, and scores 8.

These are not different brands. They are properties within the same brand, carrying the same name, listed on the same booking platforms, competing for the same guest. A traveller choosing between them based on the InterContinental name has no way of knowing which experience they will receive. The brand label, in this category, does not function as a reliable quality signal.

What It Costs

The revenue model presented in Section 6 is built from transparent assumptions and shown in full. Every input is stated. Every calculation is visible. A representative 250 room luxury property operating at 70% occupancy with a \$350 ADR can expect approximately \$2.3 million in conservative incremental annual revenue from a structured dog friendly programme. That figure breaks down into three streams: \$1.6 million from occupancy lift as the property captures bookings from dog owning travellers who would otherwise choose competitors; \$479,000 from the 30% ancillary spending premium that dog owning guests consistently deliver across food, beverage, spa, and room service; and \$228,000 from pet fees set at a conservative \$50 average.

The sensitivity analysis in Section 6.3 tests these assumptions across five scenarios. Even the most conservative scenario, a 3% occupancy lift with a \$50 fee, produces \$1.4 million per property per year. The upper range, a 7% lift with a \$150 fee, produces \$3.9 million. The investment required to move a property from D or F performance to B or above sits between \$50,000 and \$100,000, covering policy changes, basic amenity provision, staff awareness training, and local service partnerships. At the base case revenue rate, that investment delivers a 23x to 46x annual return, with revenue building over 6 to 12 months.

Applied across the 21 underperforming InterContinental properties (those scoring D, F, or failing to meet the standard), the base case model implies approximately \$48 million in unrealised annual revenue. This is not theoretical. It is arithmetic derived from documented guest spending patterns applied to the specific properties in this study.

What It Means Beyond IHG

These patterns are not unique to InterContinental. Across the broader global dataset, approximately half of all assessed hotels did not meet minimum evaluation requirements. Of those that did, 49% scored D or F and only 9.5% achieved A or A+. Comparable underperformance appears in Hyatt (74% D+F across 31 properties), Hilton (60% D+F across 10 properties), and Marriott branded hotels (100% D+F across 6 properties). The issue is structural. It belongs to the franchise model and to an industry that has applied rigorous, measurable quality standards to breakfast, room condition, and brand presentation, but has never applied the same discipline to dog friendly hospitality.

The segment that these brands are underserving is not small. Over 50% of global pet owners seek accommodations that welcome their animals. Forty six percent of hotels in major urban markets now describe themselves as dog friendly. Dog owning travellers spend more per stay, book more frequently, and demonstrate higher loyalty to properties that serve them well. This is a segment that is growing in every major travel market and approaching the point where dog friendly provision shifts from differentiator to expectation. The brands that are unprepared for that shift are the ones documented in this study.

The Three Benchmarks

What distinguishes this study from a general industry critique is the controlled comparison it enables. Three benchmarks, drawn from the same dataset and assessed under the same framework, demonstrate that the underperformance documented here is a choice, not a structural constraint.

InterContinental Miami proves that exceptional performance is achievable within IHG's existing operating framework. It sits in the top 1% of all hotels in the global dataset. It operates under IHG brand standards, within IHG's ownership and management structures, in a competitive urban market. The constraint on the other 29 properties is not brand architecture.

Kimpton, an IHG brand, proves that consistency is achievable across an entire portfolio within the same corporate structure. Twenty two Kimpton properties were assessed under the identical RDFS-02 framework. They average 29.4, which is 52% higher than InterContinental's 19.3. They produce zero F grades where InterContinental produces five. Their scoring spread is 28 points where InterContinental's is 57. Kimpton achieves this through uniform policies: no pet fees, no weight limits, consistent amenity provision. IHG already owns this playbook. The question is why it has not been adapted or enforced within its flagship luxury brand.

Red Carnation Hotels proves that an independent luxury group can embed dog friendly hospitality as a brand level commitment with measurable, repeatable results. Its two assessed properties, Egerton House in London (45, A) and Summer Lodge Country House Hotel in Dorset (40, A), both outperform every InterContinental property except Miami. Their average score of 42.5 is more than double InterContinental's portfolio average. Red Carnation achieves this not through scale but through intent: every property in the group treats dog friendly service as a non negotiable brand standard.

The Decision

The challenge facing InterContinental is therefore not capability, knowledge, or corporate infrastructure. The capability exists in Miami. The knowledge exists in Kimpton. The infrastructure exists in IHG's corporate brand management systems. What is missing is the decision to treat dog friendly hospitality with the same rigour that IHG applies to every other dimension of its guest experience.

Every number in this study is derived from a consistent, criteria based evaluation framework. Every revenue figure is built from stated assumptions with transparent calculations. The methodology is open, the data is verifiable, and the conclusions follow directly from what was measured.

The question for IHG, and for any hotel group that operates across multiple properties in a market where dog owning travellers represent a growing, high spending, and increasingly expectant segment, is straightforward: engage with this measurement, understand the

variance it reveals, and make the operational decisions that the data supports. Or do not, and accept that the revenue, the consistency, and the brand trust it would deliver will go to the competitors who do.

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