

Nobody Trusts Pet Friendly

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Executive Summary

"Pet friendly" is one of the most used phrases in hotel travel. It is also one of the least meaningful. The term has no agreed definition, no shared standard, and does not even specify which animals it refers to. In practice, the vast majority of travellers booking pet friendly hotels are travelling with dogs. Most pet friendly hotels only accept dogs. Only 10% accept cats.

The phrase covers a category it does not describe, and policies it does not define.

Roch Dog is an independent certification body focused on this problem. We have written a published standard that replaces the vague language of "pet friendly" with a specific, verifiable definition of what dog friendly actually means [9]. We have assessed thousands of hotels across 56 countries against it and found that nearly half fail. Most of them still call themselves pet friendly.

The dog friendly hotel market is projected to reach \$5.16 billion by end of 2026 and \$8.17 billion by 2030 [1][2]. The travellers driving that growth are not looking for marketing language. They are looking for properties that can demonstrate what they claim.

This white paper explains the problem, the evidence, industry feedback, our solution, and what the new Roch Dog Friendly Standard (RDFS-02) does about it.

SECTION 1

The Problem: Pet Friendly Is Broken

Start with the phrase itself. "Pet friendly." Which pets? A dog? A cat? A parrot? The term does not say. It does not have to, because nobody has ever defined it. In practice, pet friendly almost always means dogs. The vast majority of guests arriving at pet friendly hotels arrive with dogs, not cats, not rabbits, not anything else. But the phrase pretends to be broader than it is.

When Roch Dog assessed hotels that describe themselves as pet friendly, only 10 to 15% actually accept cats. The rest accept dogs only but use the word "pet" anyway. The label is inaccurate before it is even vague. The phrase fails everyone. Dog owners cannot trust it because it is undefined. Cat owners have learned to ignore it entirely because they know it does not mean them. A label that misleads one group and excludes another is not a standard. It is a bad marketing habit that nobody has bothered to fix.

Then there is the vagueness. One hotel says "pet friendly." Another says "dogs welcome." A third says "small dogs only." A fourth says "dogs allowed but not in the bar." A fifth has no policy at all but will accept dogs on request. None of these mean the same thing. All of them appear in the same search results under the same filter on the major booking platforms.

The policies behind the language are more inconsistent still. One hotel requires advance notice and a nightly fee on top of a cleaning surcharge. Another allows dogs only in a single room category, providing they weigh under ten kilograms. Another offers dog beds, dog menus, and dogs welcome everywhere. All of it surfaces as "pet friendly." None of it is comparable, structured, or verifiable.

Hotels restrict access by size, breed, number, floor, room type, and season. Some publish clear policies. Many do not. Some apply rules consistently. Others leave it to whoever is at reception.

There is an important distinction the industry consistently ignores. Allowed is not the same as friendly. A hotel that permits dogs with heavy fees, restricted access, and no amenities has allowed a dog through the door. It has not been dog friendly. The difference between tolerated and welcomed is real, and the "pet friendly" label currently covers both.

Dog owners learn this the hard way. They book on the strength of a label and arrive to find something different. The bar is closed to dogs. The dog must stay in the room if anyone wants dinner. The bed is a folded towel. These are not unusual experiences. They are normal.

The fix is not to repair the phrase "pet friendly." The fix is to replace it with something specific, defined, and honest. That is what "dog friendly" means when it is backed by a standard.

SECTION 2

The Traveller Has Changed

Something shifted in the relationship between people and their dogs, and it has not shifted back. Dogs used to be pets. They lived in the garden, or in a bed in the kitchen, and they were largely absent from the parts of life that happened outside the home. That is no longer the majority experience. For a growing number of households the dog is not a pet. The dog is family, and family deserves good hospitality.

This is not a marketing abstraction. It is an observable change in behaviour. Dogs sleep in beds. They appear in Christmas cards and professional photographs. Their dietary needs and anxiety levels are taken seriously. When their owners travel, they travel too.

78% of dog owners now travel with their dogs annually [1]. 70% of American households own at least one pet. This is not a niche segment. It is a majority.

The fastest growing group within it has a name: DINKWADs. Dual income, no kids, with a dog. Predominantly Millennials and Gen X, with substantial disposable income and no obligation to leave the dog at home. This segment controls \$259 billion in annual spending power, projected to reach \$427 billion by 2030 [5]. They travel frequently, spend freely, and treat their dogs as family.

The global picture reinforces this. North America holds 42% of the dog friendly hotel market [1][14], but the fastest growing region is Asia Pacific, expanding at 10.29% CAGR through 2031 [14]. In EMEA, 47% of travellers cite pet friendliness as a critical factor when choosing accommodation [6]. This is not a regional trend. It is a structural shift in how people travel.

What these travellers want from a hotel is not complicated. They want their dog treated the way they treat their dog: as a welcome member of the household, not a problem to be managed. They want to sit in the bar with the dog at their feet. They want indoor access. They want the dog's needs provided for without a fee structure that punishes them for bringing a living creature they care about.

What they have found instead is toleration dressed up as welcome. Weight limits that exclude normal dogs. Policies that change depending on who answers the phone. Cleaning surcharges stacked on nightly pet charges.

75% of dog owners say they would pay more for accommodation that genuinely delivers on dog friendly claims [4]. 64% would pay up to \$50 more per night. The willingness is there. The trust is not.

SECTION 3

The Business Case for Hotels

Hotels that are authentically dog friendly outperform comparable properties by a margin that is hard to ignore. Properties with genuine dog friendly policies generate 28% more bookings and 30% more revenue than non dog friendly equivalents [4]. Dog owning guests stay 22% longer, 2.56 nights versus 2.1, and spend 30% more on food, beverage, and spa services during their stay. They return at a rate of 76%, against an industry benchmark of 30 to 40%.

The compound effect of higher occupancy, longer stays, higher spend, and exceptional repeat business is substantial. Conservative estimates of incremental annual revenue run from \$750,000 to \$4 million per property, depending on scale and market.

The market backing this is growing fast. The dog friendly hotel sector is expanding from \$4.6 billion in 2025 to a projected \$5.16 billion by end of 2026 and \$8.17 billion by 2030, a compound annual growth rate of 12.2% that significantly outpaces broader hospitality [1][2]. Luxury dog friendly properties are already commanding premium rates, with properties scoring A or A+ in the Roch Dog dataset generating RevPAR premiums of 15 to 25% over comparable non dog friendly competitors [7][8].

This growth matters because the broader industry is not growing at the same pace. RevPAR fell 0.3% in 2025, the first non recessionary decline in industry history [12]. Hotel operators are searching for counter cyclical revenue levers and dog friendly hospitality is one of the few segments delivering consistent growth against a softening market. The DINKWAD demographic, controlling \$259 billion in spending power today and \$427 billion by 2030 [5], represents a concentrated, high value audience that books more frequently, stays longer, and spends more per visit than the average guest.

The problem is that hotels capturing this value have no reliable way to prove it. A property that has genuinely invested in dog welcoming design, staff training, and real amenities cannot distinguish itself from one that simply removed the "no pets" sign. They appear under the same label in the same search results.

Certification fixes this. A hotel that meets the Roch Dog Friendly Standard can easily demonstrate its position to guests [9]. A hotel that does not cannot claim it.

SECTION 4

The Data

Roch Dog has assessed over 2,000 hotels across 56 countries against more than 36 data points per property, covering policies, amenities, access, restrictions, and consistency. The dataset spans independent boutique hotels, global luxury chains, and mid range brands. Every property was assessed under the same framework, using the same criteria, during the same period. The result is the largest structured evaluation of dog friendly hospitality ever conducted.

49% score D or F by our ranking measure.

The failures are not random. They cluster around the same structural gaps. The most common is the absence of indoor shared space access for dogs. A property that confines dogs to guest rooms is not providing a dog friendly experience. It is providing a room that tolerates a dog. The guest cannot use the bar, the restaurant, or the lounge. They are segregated from the core hotel experience they are paying for.

Weight and size limits represent the second most common failure. A limit of 25 pounds excludes Labradors, Golden Retrievers, German Shepherds, and the majority of mixed breed dogs. These are the most common family dogs in nearly every Western market. A hotel that excludes them while describing itself as pet friendly has not made an honest claim.

Unpublished or inconsistent policies account for the remainder. Guests report one set of rules at booking and a different set at check in. Staff apply restrictions that do not appear on the website. Fees are disclosed after the reservation is confirmed. These are not edge cases. They are the norm in the bottom half of the dataset.

The gap between what properties claim and what they actually deliver is the dominant story in the data. Every requirement in RDFS-02 addresses a failure mode that appears repeatedly across the dataset. The standard was not designed in theory. It was built on evidence.

What Hotels Are Getting Wrong

The failures in the dataset are not random. They cluster around the same mistakes. The most common is the policy written as a list of restrictions. Weight limits. Breed exclusions. Designated floors only. No access to shared spaces. A cleaning fee, a nightly surcharge, and a damage deposit. No mention of what the dog will actually find when it arrives. These are not hospitality documents. They are liability documents dressed up as welcome.

Weight limits deserve specific attention. A limit of twenty five pounds excludes a Labrador Retriever. A limit of forty pounds excludes a Golden Retriever. These are the most common family dogs in most Western markets. A hotel that excludes them while calling itself dog friendly is not being straightforwardly honest.

Fee structures tell a similar story. A cleaning fee is legitimate when it reflects real costs and is stated upfront. What dog owners encounter more often is a cleaning fee on top of a nightly pet charge on top of a damage deposit, with no corresponding improvement in what the dog receives. The message is not "we welcome your dog." It is "your dog is an inconvenience we have priced accordingly."

There is a particular mechanism at work in the lowest performing properties that deserves examination. Deterrent pricing is not the same as cost recovery. When a bottom performing hotel charges high fees, those fees do not fund services. They fund nothing. The fee exists as friction to limit arrivals. This is rational if you view dogs as a liability. It is also fundamentally incompatible with the revenue data. The properties generating the highest returns from dog friendly hospitality charge moderate fees and invest the margin into genuine welcome: trained staff, proper amenities, indoor access, and consistent delivery. Properties that use fees as a barrier to entry consistently underperform those that use fees to fund quality [7][8]. Deterrent pricing and dog friendly hospitality are structurally opposed strategies.

Then there is the consistency problem. Policies that read well on paper but change depending on who is at the desk. A guest told dogs were welcome in the restaurant and arrives to find the evening shift disagrees. 49% of properties scoring D or F is not a statistical anomaly. It is the predictable result of an industry that has never been held to a standard.

Addressing the Operational Objection

The most common objection to dog friendly hospitality is operational: allergies, cleaning, noise, damage. These are real concerns. They are also solvable, and the data shows that hotels which address them properly end up with better hygiene outcomes than those that try to avoid the issue entirely [10].

A hotel with no dog policy is not a hotel without dogs. It is a hotel with unmanaged dogs. Guests bring undeclared pets. Service animals arrive with legal right of access and no advance notice. Emotional support animals occupy a grey area that varies by jurisdiction. The result is that properties which prohibit dogs still encounter them, but without the protocols, equipment, or staff training to manage the situation [13]. The hotel that plans for dogs outperforms the hotel that pretends they will not show up.

The operational investment is well documented. Enzymatic cleaners break down allergens at a molecular level, eliminating residue that standard cleaning leaves behind. HEPA air purification systems in designated rooms reduce airborne allergens to levels below those found in many non dog friendly properties that have never been deep cleaned for pet dander. Professional housekeeping protocols, including allergen barrier bedding, dedicated vacuum equipment, and structured room rotation between dog friendly and standard inventory, produce measurably better outcomes than ad hoc cleaning after an undeclared pet visit [10][11].

The capital required is modest. For a property currently scoring F or D in the Roch Dog dataset, the investment to reach B level compliance runs from \$50,000 to \$100,000, covering equipment, training, amenity procurement, and signage. Against the incremental revenue generated by genuine dog friendly hospitality, this represents an 8 to 16 day payback period. Few capital investments in hospitality deliver returns at that speed.

The allergy concern specifically is better managed through transparency than avoidance. A hotel that clearly designates dog friendly rooms and maintains separate inventory for allergy sensitive guests serves both audiences. A hotel that allows undeclared pets in theoretically pet free rooms serves neither [11]. The standard addresses this directly: certification requires published, consistent policy. Published policy allows every guest to make an informed choice.

Why Standards Matter and Why Now

In most areas of hospitality, standards exist. Fire safety is regulated. Food hygiene is inspected. Star ratings follow agreed criteria. Dog friendliness has no equivalent. No agreed definition. No accountability. No floor. Hotels self declare and guests have no benchmark.

Standards solve one problem: 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, the claim is unverifiable. With one, it is checkable. The only question is who writes the definition and whether they can be trusted to hold it.

The timing is not incidental. Dog ownership rose sharply during and after 2020. It has not reversed. What changed was not just volume, but behaviour. A large cohort of owners began travelling with their dogs as a default, not an exception. Those habits have held over the mid to long term [3][5].

This is now a permanent segment of the travel market, with real spend and clear expectations. These travellers book differently, stay longer, and make decisions based on whether their dog can be accommodated properly. For them, "dog friendly" is not a preference. It is a requirement.

The problem is that the market did not adapt at the same pace. Supply increased in name, not in substance. More hotels began describing themselves as dog friendly, but without any shared definition or consistent delivery. The gap between what is claimed and what is experienced widened. At a small scale, this kind of inconsistency is friction. At scale, it becomes market failure. Guests cannot trust the label. Hotels cannot differentiate on it. The category loses meaning.

At the same time, the infrastructure to fix this now exists. Hotels publish detailed policies online. Data can be collected and compared systematically. Certification can be applied, verified, and distributed globally. The conditions that make a standard viable are in place.

This is the inflection point. The demand is established. The inconsistency is measurable. The tools are available. A standard is no longer a forward looking idea. It is a necessary response to a category that has outgrown informal and inaccurate marketing claims.

SECTION 8

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 [9]. It defines the baseline. The floor below which no property can legitimately use the label. Every requirement is binary. A property meets it or it does not. There is no partial compliance, no score, no tier. A hotel is certified or it is not.

What makes it different from every other dog friendly designation in the market is that it is independent and enforceable. Roch Dog does not sell listings. A hotel cannot buy certification by paying a fee. It must meet the standard. The standard is public. Any hotel can read it before applying. Any guest can read it and know exactly what a certified property is required to provide. That transparency is not incidental. It is the source of the standard's authority.

How Certification Works

Hotels apply by submitting a structured survey covering their dog policies, amenities, and operational practices, supported by published terms and booking conditions.

We assess the submission against RDFS-02. We also review what the hotel states publicly on its own website and booking platforms. Where marketing claims and documented policies conflict, the documented policy governs. The outcome is pass or fail. A property that fails a single requirement is not certified.

Certified properties are listed in the Roch Dog public directory. Properties that do not pass are not listed. The absence of certification means something. That is the point.

Certification is a live status, not a permanent award. Properties are subject to periodic review. Certification can be withdrawn if practices change or if information provided during assessment is found to be inaccurate.

What the Standard Requires

Here is the test. If you travel with a normal family dog, can you stay in a standard guest room, enter at least one indoor shared space such as a lounge, bar, or restaurant, and find food and water bowls already provided? Does the hotel apply these conditions consistently? Regardless of who is at the desk? If yes, the hotel is dog friendly. If not, it is not.

To meet the standard, a hotel must permit dogs to stay overnight in standard guest bedrooms as a clearly published policy; permission by exception or on request does not qualify. Dogs must also be allowed in at least one indoor shared guest space, such as a lounge, bar, or restaurant, since outdoor access alone is insufficient. In addition,

the hotel must provide appropriate food and water bowls as standard. These must be stable, non disposable, and correctly sized; travel bowls, or owner supplied items do not meet the requirement.

The policy must not exclude normal family dogs through blanket size or weight restrictions. Any limit that effectively rules out common breeds such as Labrador Retrievers or Golden Retrievers is disqualifying, although restrictions based on lawful or clearly documented operational reasons may be considered. Rules must be applied consistently, regardless of who handles the booking or reception. Finally, all fees and deposits related to dogs must be clearly disclosed before booking; undisclosed charges at check in are not compliant.

In practice, this replaces vague "pet friendly" claims with a clear, enforceable benchmark giving operators a defined standard to meet and guests a level of consistency they can rely on. The full dog friendly standard is published here, any hotel can read it before applying. Any guest can read it to know exactly what a certified property has committed to.

Why Independence Matters

If hotels define dog friendly, the definition serves hotels. If booking platforms define it, the definition serves platforms. Neither has any incentive to set a meaningful floor. Both have every incentive to maximise the number of properties that qualify. This is exactly what has happened. The term has been stretched until it covers almost anything.

The history of quality standards in other industries demonstrates why this matters. Food hygiene standards are not written by restaurants. Fire safety codes are not written by building developers. Energy efficiency ratings are not administered by appliance manufacturers. In every case where a standard carries public trust, the body that defines and enforces it operates independently of the industry it certifies. The reason is structural: a certifier whose revenue depends on approving applicants will, over time, lower its threshold to approve more of them. A certifier whose credibility depends on the standard being meaningful has the opposite incentive.

This distinction is not theoretical. The hotel industry has already experienced what happens when quality designations are controlled by the parties being assessed. Star rating systems in many markets are self declared. Review platforms are gamed. "Pet friendly" filters on booking sites have no verification behind them. The result in every case is the same: the designation loses meaning, the guest loses trust, and the hotels that have genuinely invested in quality lose their ability to distinguish themselves from those that have not.

Roch Dog is independent. We are not owned by a hotel group. We do not take advertising revenue from the properties we assess. We do not sell directory placements or priority listings. Our revenue comes from certification, not from the volume of hotels we approve, and that structural alignment is fundamental to the standard's credibility.

We benefit when the standard is trusted. We lose nothing by failing a property that does not meet it. A hotel paying a certification fee is paying for an honest assessment, not a guaranteed outcome. That is the only model under which the certification carries weight with the audience it is designed to serve: the guest who needs to know, before booking, whether a hotel will genuinely welcome their dog.

What the Industry Is Saying

During the development of RDFS-02, Roch Dog sought feedback from hotel operators, hospitality consultants, investors, industry associations, and dog welfare specialists. The response was consistent. A senior marketing leader at a major international hotel group confirmed that durable food and water bowls are a reasonable minimum for any property claiming to be dog friendly, and that the number of properties failing even this basic test is a credibility problem for the broader market. An industry association working across the dog friendly hotel sector stated that without shared definitions, the phrase means different things from one property to the next, creating confusion for guests and operational friction for hotels.

A hospitality consultant specialising in pet programming identified three failure modes the absence of a standard creates: guest confusion when expectations do not match reality, staff friction when policies are interpreted in real time, and unreliable supplier data that limits the usefulness of any discovery tool built on top of it.

Roch Dog also consulted directly with more than 40 hotel general managers, owners, and senior executives across multiple markets during the standard's development. The consensus was clear. Most had been fielding a rising volume of dog related guest enquiries with no internal framework for how to respond. Several acknowledged that their own properties used the phrase "pet friendly" without a written policy to support it.

Others described the competitive frustration of investing in genuine dog welcoming infrastructure only to be indistinguishable from properties that had done nothing beyond removing a restriction. The need for a shared definition was not theoretical to any of them. It was operational, commercial, and overdue.

The commercial signal from the broader industry was equally clear. A European dog hospitality consultant with more than 120,000 guest interactions confirmed that structured standards are no longer optional for hotels operating at scale. An investor in consumer brands described the shift as moving pet friendly from a label of tolerance into design, systems, and accountability. The founder of a pet concierge consultancy called the current state of pet policies a Wild West and named the Roch Dog standard as the start of a global benchmark for measurable pet hospitality. None of these sources work for Roch Dog. All of them arrived at the same conclusion independently. The category needs a defined floor, and certification is the mechanism to hold it.

Conclusion

This standard did not exist. Now it does.

More than 2,000 hotels have been assessed against a consistent framework. A definition has been written, published, and made public. A certification process now exists that passes or fails properties on evidence, not on claims and not on fees.

Until this point, the category had no floor. "Pet friendly" was undefined, unverified, and inconsistently applied. It could refer to a genuinely accommodating hotel or one that imposed restrictions that made a stay functionally impossible. Both used the same label. Neither was held to account.

That is why the category broke. Not because the idea of travelling with dogs is difficult, but because the language used to describe it carried no fixed meaning. The Roch Dog Friendly Standard establishes that meaning.

Trust in travel does not come from claims. It comes from structure: clear definitions, enforced standards, and independent verification. That is how every mature category works. The label stops being subjective and starts being reliable. A certified hotel is not describing itself. It is meeting a published standard, assessed independently, and held to it over time. The claim becomes specific. The meaning becomes fixed. The guest knows what they are booking. The hotel knows what it has committed to.

The standard does not attempt to describe the best possible dog friendly experience. It defines the minimum required for the term to be credible at all. A property either meets that definition or it does not. There is no partial compliance and no interpretation.

This creates a clear line where none existed before. A certified property has met a published, independently assessed standard and is required to maintain it. An uncertified property is making a claim it cannot verify. That distinction is the beginning of a functioning market. Guests can make decisions based on something real. Hotels can differentiate based on something provable. The label starts to carry weight. This is how categories stabilise.

A definition is set. A standard is enforced. The market adjusts around it. Dog friendly travel has reached the point where this is necessary. The demand exists. The inconsistency is clear. The absence of a standard is no longer sustainable.

The definition is written. The standard is live. The certification is open. The category is fixable. The fix is here.

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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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