

# The Economics of Dog Friendly Hospitality

How Hotels Are Leaving \$2.3 Million Per Property on the Table

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## How Hotels Are Leaving \$2.3 Million Per Property on the Table

### Executive Summary

The hotel industry has applied measurable quality standards to almost every dimension of the guest experience. Room condition, food and beverage, brand presentation, loyalty programmes, and staff training are governed by documented standards, inspected regularly, and enforced through compliance mechanisms. Dog friendly hospitality has received none of this attention. The result is a category where roughly half of all hotels that describe themselves as pet friendly fail structured assessment, where a single luxury brand can produce a 57 point scoring spread across its own portfolio, and where properties charging the highest fees consistently deliver the weakest experiences. This is not primarily a quality problem. It is a revenue problem.

The financial indicators are consistent across multiple data sources. Dog owning guests stay approximately 22% longer than the industry average, spend around 30% more on food, beverage, spa, and ancillary services, and return at a rate of 76% compared to a loyalty programme benchmark of 30 to 40%. A representative 250 room luxury hotel operating at 70% occupancy with a \$350 average daily rate can expect approximately \$2.3 million in conservative incremental annual revenue from a structured dog friendly programme, though actual results will vary by market, execution quality, and local demand density. The investment required to deliver that programme sits between \$50,000 and \$100,000. The payback period under the base case model is 8 to 16 days.

The market trajectory supports the thesis. The global dog friendly hotel segment is valued at \$4.6 billion and growing at 12.2% annually, reaching a projected \$8.17 billion by 2030. The demographic driving this growth, dual income households with no children and a dog, controls an estimated \$259 billion in annual spending power. In a market where RevPAR growth has broadly flattened, dog friendly hospitality represents one of the more compelling counter cyclical revenue levers available to operators.

This paper quantifies the gap between this opportunity and current industry performance, models the revenue on the other side of it, acknowledges the constraints and execution risks involved, and identifies the operational decisions that separate the properties capturing this value from the ones leaving it on the table.

# What This Paper Does and Does Not Do

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

## What it does:

It quantifies revenue potential using a transparent model with stated assumptions. It draws on the Roch Dog Assessment Dataset, covering approximately 2,000 hotels across 56 countries, supplemented by third party market research, academic literature, and press coverage. It presents a controlled case study of 30 InterContinental Hotels and Resorts properties assessed under a single evaluation framework. It identifies behavioural patterns among dog owning travellers that drive measurable differences in occupancy, spend, and loyalty.

## What it does not do:

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

## Introduction

Dog ownership has reached a scale that the hospitality industry can no longer treat as peripheral. In the United States, 65.1 million households own a dog. Seventy eight percent of those households travel with their dog. Canada now has nearly four times more pets than children under 18. Across EMEA, 47% of travellers identify pet friendliness as a critical factor in accommodation choices. The term "pet travel" is searched more than 19 million times annually in the US alone. These are current demand signals from a segment that is already booking, already spending, and already making decisions about which hotels deserve their loyalty.

The demographic at the centre of this shift is the DINKWAD: Dual Income, No Kids, With A Dog. This group controls an estimated \$259 billion in annual spending power, projected to grow to \$427 billion by 2030. DINKWADs combine high disposable income with travel flexibility and a demonstrated willingness to pay premium rates for experiences that genuinely accommodate their dog. They are not price sensitive travellers looking for a room that tolerates animals. They are affluent consumers who will pay more, stay longer, and return more frequently to any property that delivers on the promise of dog friendly hospitality. The problem is that most properties do not deliver on that promise.

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

This paper presents the economic case for treating dog friendly hospitality as a structured revenue strategy. It draws on the Roch Dog Assessment Dataset, third party market research from Grand View Research, The Business Research Company, and others, academic work including Buhalis and Chan (2023), and a controlled case study of 30 InterContinental properties. The findings are intended for hotel owners, asset managers, brand leadership, and investors evaluating where the next increment of revenue growth will come from.

## SECTION 2

# The Performance Gap

The economics of dog friendly hospitality are available to every hotel that chooses to invest in this category. The problem is that most hotels have not made that choice. The gap between market demand and operational delivery is where the revenue is being lost.

## 2.1 The 49% Failure Rate

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

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

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

## 2.2 The InterContinental Case Study

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

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

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

## 2.3 The Kimpton Paradox

The most significant finding does not come from outside IHG. 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.

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. No Kimpton property charges a pet fee. No Kimpton property imposes a weight limit. No Kimpton property requires a damage deposit. The operational knowledge to close the gap in the InterContinental portfolio already exists within IHG. The constraint is not capability. It is strategic priority.

## 2.4 What A+ Looks Like

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

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

Its fee of \$100 per stay sits below the portfolio median. Miami does not charge more for a better experience. It charges less. The contrast with the bottom of the portfolio is instructive. InterContinental San Diego scored negative one, meeting 2 of 31 criteria. InterContinental New York Times Square scored 5, meeting 2 of 31 criteria, and charges \$250. These properties do not merely underperform. Their policies actively penalise the guest for arriving with a dog.

## SECTION 3

# The Revenue Mechanics

The revenue case for dog friendly hospitality rests on three pillars: occupancy and demand, pricing power and ADR, and total revenue per available room. Each operates independently. Together, they compound.

## 3.1 Occupancy and Demand

Multiple studies indicate that dog friendly properties generate significantly more bookings than comparable non dog friendly properties, with figures in the range of 15 to 28% higher occupancy depending on market and methodology. Seventy eight percent of dog owners travel with their dogs annually. Dog owning guests demonstrate a repeat booking rate of approximately 76%, compared to the industry benchmark of 30 to 40%.

Occupancy Performance Metric	Benchmark
Booking Volume Lift	Up to 28% (varies by market)
Occupancy Advantage	15 to 20% higher
Annual Pet Traveller Participation	78% of dog owners
Repeat Booking Rate	~76% (vs 30 to 40% industry benchmark)
Average Length of Stay (ALOS)	2.56 nights (vs 2.1 industry benchmark)

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

## 3.2 Pricing Power and ADR

Dog friendly properties command a measurable ADR premium over comparable non pet listings. The average pet fee across major US hotel brands is \$76.01, representing approximately 24% of the average room rate. Seventy five percent of dog owners state they would pay more for accommodation that genuinely delivers on dog friendly claims. Sixty four percent would pay up to \$50 more per night for a property with a verifiable, high grade dog friendly experience.

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

The willingness to pay is real but conditional. Dog owners will pay premium rates when the experience justifies it. They will not pay deterrent fees for a room and nothing else.

### 3.3 TRevPAR and the Stay In Effect

Dog owning guests spend approximately 30% more on property on food, beverage, spa services, and other ancillaries. This is driven by a behavioural pattern that can be called the Stay In Effect: a guest travelling with a dog is more likely to eat at the hotel restaurant, order room service, use the hotel bar, and book spa services than to leave the property and spend money elsewhere. Leaving a dog alone in an unfamiliar hotel room is stressful for both the dog and the owner. The guest who feels their dog is welcome throughout the property stays on property. The guest whose dog is confined to the room leaves to eat, drink, and spend money elsewhere.

Average length of stay for dog guests is 2.56 nights compared to the industry standard of 2.1 nights, a 22% premium. The margin profile is equally notable. Industry data indicates that pet related services represent 5 to 8% of total hotel revenue but contribute 25 to 30% of overall profit. The overhead is minimal. The guest is already in the room. The kitchen is already operating. The incremental cost of serving a dog owning guest is a fraction of the incremental revenue they generate.

## SECTION 4

# The Revenue Model

## 4.1 Per Property Economics

The following revenue model is based on a representative luxury hotel with characteristics aligned to the InterContinental portfolio. All assumptions are stated explicitly. Actual results will vary based on market conditions, local dog ownership density, demand elasticity, and execution quality.

### Baseline Property Profile:

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

### Incremental Revenue Calculation:

A 5% occupancy lift 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 approximately 30% more on ancillary services, producing \$479,115 in incremental ancillary revenue. Pet fee revenue at \$50 average across 4,563 additional nights produces \$228,150.

Revenue Stream	Annual Incremental Value
Room Revenue (5% occupancy lift)	\$1,597,050
Ancillary Revenue (30% spending premium)	\$479,115
Pet Fee Revenue (\$50 average)	\$228,150
Total Incremental Revenue	\$2,304,315

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

## 4.2 Portfolio Scale Impact

Applied across the 21 InterContinental properties that scored D, F, or failed to meet the standard, the base case model implies approximately \$48 million in unrealised annual revenue across just the underperforming portion of a single brand's portfolio. Comparable underperformance appears in Hyatt (31 properties, 74% D+F rate), Hilton (10 properties, 60% D+F rate), and Marriott branded hotels (6 properties, 100% D+F rate).

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

## 4.3 Sensitivity Analysis

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

Scenario	Occupancy Lift	Pet Fee	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 the conservative scenario, a 3% occupancy lift with a \$50 fee, produces \$1.4 million in incremental annual revenue for this property archetype. Smaller properties at lower ADRs will see proportionally lower absolute figures. A 150 room property at \$250 ADR with a 3% occupancy lift produces approximately \$615,000. Across property types, the range is approximately \$600,000 to \$4 million per property, though individual results will depend heavily on market conditions, demand density, and execution quality.

## Behavioural Economics of the Dog Traveller

The revenue mechanics described above are driven by behavioural patterns that distinguish dog owning travellers from conventional guests.

### 5.1 Switching Cost and Loyalty Lock

The 76% repeat booking rate reflects switching cost, not general satisfaction. Finding a genuinely dog friendly hotel is difficult. A traveller who identifies a property that welcomes their dog without friction has made an investment in discovery that they will not willingly repeat. The emotional cost of arriving at a new property and discovering restrictions is high enough to make the known quantity overwhelmingly preferable. Dog owning guests are not more loyal by disposition. They are more loyal because the cost of disloyalty is too high.

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

### 5.2 The Shared Space Multiplier

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

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

### 5.3 The Trust Premium

The majority of dog owning guests do not trust the pet friendly label on booking platforms. They phone hotels directly to confirm whether dogs are actually welcome, what restrictions apply, and whether specific areas are accessible. This is rational behaviour in the absence of reliable information. Policies change depending on who is at the desk. A guest told dogs were welcome in the restaurant arrives to find the evening shift disagrees.

Verified, graded assessment provides the trust signal that the label "pet friendly" no longer carries. As one marketing manager at a luxury property put it: "We know that we are the best

dog friendly hotel in our area, but until we became certified we couldn't prove it."

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

## SECTION 6

# Why Hotels Fail

## 6.1 The Language Problem

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

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

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

## 6.2 Policy Friction as a Revenue Killer

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

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

### 6.3 Operational Failure Modes

Hotels that have not invested in dog friendly programming experience predictable failure modes. Dogs are left unattended during breakfast because there is nowhere for them to go. Staff interpret vague policies in real time because no written policy exists. The morning shift says dogs are welcome in the restaurant; the evening shift disagrees. These are the operational reality at properties that have adopted the label without building the infrastructure.

### 6.4 The Award Scheme Problem

Existing pet friendly hotel awards often reinforce the problem. TripAdvisor's 2024 number one pet friendly hotel scored 10 out of 52 points under structured assessment, a C grade. Dogs were banned from the bar, restaurant, and all public areas. Meanwhile, InterContinental Miami, scoring A+ at the time, was not featured in either major award programme. Awards that measure popularity without verification provide a weak signal in a category defined by inconsistency.

## Where This Breaks

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

### 7.1 Luxury Urban vs Resort Properties

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

### 7.2 Cultural Resistance Markets

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

### 7.3 Allergy and Sensitivity Concerns

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

### 7.4 Food and Beverage Complexity

Allowing dogs in food and beverage areas introduces genuine operational considerations: hygiene protocols, furniture protection, staff training, and the experience of non dog guests. These are solvable problems, as demonstrated by the high performing properties in the dataset, but they are not trivial. Properties that skip the operational groundwork and simply open the restaurant to dogs without preparation will create guest experience failures that undermine the economic case.

## 7.5 Execution Risk

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

## 7.6 Data Limitations

The Roch Dog Assessment Dataset is the largest structured evaluation of dog friendly hotel performance available, but it carries limitations. It has not been externally audited. It is skewed toward English speaking and European markets. Assessment criteria are defined by a single organisation. While the framework has been applied consistently across approximately 2,000 properties, the dataset should be understood as the most comprehensive available rather than definitively representative.

## SECTION 8

# The Minimum Viable Dog Friendly Programme

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

1. Remove arbitrary weight limits. A 25 pound limit excludes the majority of family dogs. If the property can accommodate a dog, it can accommodate a Labrador.
2. Provide shared space access. Dogs must be allowed in at least one indoor shared space, a lobby area, a bar, a lounge, or a terrace. Without this, the 30% ancillary spend premium is forfeited.
3. Publish a written policy. The policy must be clear, publicly available, and consistently enforced across all shifts. Staff discretion on pet policy creates the inconsistency that drives booking abandonment.
4. Assign a programme owner. One person on staff must own the dog friendly programme. When the head of cleaning is managing dog policy by default, the programme fails.
5. Provide basic amenities. Real food and water bowls, not disposable plastic. A dog bed in the room. These are low cost signals that the property takes dog guests seriously.
6. Set pricing that reflects value. A fee is acceptable. A deterrent is not. The fee should correspond to a service level that the guest can see and experience.
7. Establish cleaning and hygiene protocols. Enzymatic cleaners, HEPA air purification, and documented room turnover procedures for dog occupied rooms. This addresses the legitimate hygiene objection and creates better outcomes than reactive discovery of undisclosed pets.

These seven elements do not require significant capital. They require a decision.

## SECTION 9

# Regional Opportunity

## 9.1 North America

North America holds approximately 42% of the global dog friendly hotel market share. The United States has 65.1 million dog owning households. The term "pet travel" is searched more than 19 million times annually. Canada now has nearly four times more pets than children under 18.

## 9.2 Europe

British dog owners spend GBP 3 billion annually on pet holiday accommodation. Spain's Law 7/2023 legally recognises animals as sentient beings and establishes fines for non compliance of up to EUR 200,000. The DACH region has the most commercially mature ecosystem, with dedicated Hundehotels and Urlaub mit Hund categories operating as productised, dog specific infrastructure programmes.

## 9.3 Asia Pacific

Asia Pacific is the fastest growing region at 10.29% CAGR through 2031, driven primarily by Japan, South Korea, and Australia. Cultural factors vary significantly across the region and should be assessed on a market by market basis.

## 9.4 Latin America

Brazil has 168 million pets and a \$9 billion pet industry. Weight limits as low as 5 kilograms are common, excluding virtually all medium and large breed dogs. The opportunity for properties that move beyond token accommodation is substantial and largely uncontested.

## SECTION 10

# Investment and Payback

Investment Category	Cost Range (Est.)
Equipment (Enzymatic cleaners, HEPA air purification)	\$15,000 to \$30,000
Amenity Procurement (Beds, bowls, food stock, treats)	\$10,000 to \$20,000
Staff Training and Policy Design	\$5,000 to \$10,000
Marketing, Signage, and Verification	\$10,000 to \$20,000
Total Investment	\$50,000 to \$100,000
Payback Period	8 to 16 days (base case model)

Monthly ongoing costs break down to approximately \$1,800 for specialised cleaning, \$1,200 for liability insurance, and \$500 for amenity provision. Total monthly operating cost of approximately \$3,500 is recovered in less than half a day of incremental revenue at the base case rate.

For context, a standard hotel room renovation costs \$15,000 to \$30,000 per room. A food and beverage outlet upgrade runs \$500,000 to \$2 million. A dog friendly programme investment of \$50,000 to \$100,000, delivering \$2.3 million in annual incremental revenue under the base case model, represents among the highest return on investment categories available to a luxury hotel operator.

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

## Implications

### For Hotel Owners and Asset Managers

Dog friendly hospitality is a revenue lever with an 8 to 16 day payback period under the base case model and a conservative annual return range of \$750,000 to \$4 million per property depending on scale, market, and execution. The investment is modest relative to the potential return. The question for individual properties is whether their market conditions and operational capacity support the investment.

### For Brand Leadership

The variation documented in the InterContinental case study is a brand consistency risk. A 57 point scoring spread within a single luxury portfolio means the brand name provides no reliable signal of quality in this category. The Kimpton comparison demonstrates that IHG already possesses the operational knowledge to deliver consistent dog friendly hospitality. What is missing is the decision to extend it.

### For REITs and Investors

In a broadly flat RevPAR environment, dog friendly hospitality represents a growth lever with documented spending patterns that outperform conventional guest segments. Properties that score A or above command occupancy premiums, ancillary spend premiums, and loyalty rates that outperform the industry baseline. The risk adjusted return profile is attractive: low investment, documented returns, and a growing market at 12.2% CAGR. The portfolio scale opportunity is large enough to be material at the asset level.

### For the Industry

The hotel industry has applied measurable quality standards to breakfast, room condition, and brand presentation. It has not applied the same discipline to dog friendly hospitality. The result is a category where quality varies dramatically within brands, where the term "pet friendly" provides no reliable signal, and where properties charging the highest fees deliver the weakest experiences.

The missing element is measurement infrastructure, whether that takes the form of certification bodies, brand level standards, or third party assessment frameworks. Multiple mechanisms could fill this gap. The brands and properties that establish and enforce measurable standards, by whatever mechanism, will be positioned to capture a growing, high spending, and increasingly expectant guest segment. Those that leave execution to property discretion will continue to produce the variance documented in this paper.

# Methodology

## Assessment Framework

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

## Dataset

The Roch Dog Assessment Dataset covers approximately 2,000 hotels across 56 countries. Approximately half met minimum evaluation requirements and were ranked. The dataset has geographic concentration in North America and Europe and is under represented in Asia, Latin America, and Africa.

## Limitations

The dataset has not been externally audited. Assessment criteria are defined by Roch Dog, which is also the entity presenting this analysis. The revenue model uses assumptions derived from industry research rather than controlled experiments. The 5% occupancy lift assumption has not been validated through randomised controlled trials and should be understood as a reasonable estimate based on available data rather than a guaranteed outcome.

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

The InterContinental case study represents a single brand assessed at a single point in time. Results may not generalise to all luxury brands or all market conditions.

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