

Pet-Friendly Tourism Market Forecasts to 2034 – Global Analysis By Service Ecosystem (Transportation Services, Accommodation Services, Pet Care and Support Services, Travel Facilitation Services, Tourism and Leisure Experiences, and Insurance and Protection Services), Pet Type, Traveler Profile, Booking Mode, Trip Scope, Travel Purpose, Price Category, and By Geography

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Abstracts

According to Statistics MRC, the Global Pet-Friendly Tourism Market is accounted for \$2.8 billion in 2026 and is expected to reach \$5.8 billion by 2034 growing at a CAGR of 9.3% during the forecast period. Pet-friendly tourism encompasses travel services, accommodations, transportation, and activities designed to welcome guests traveling with their animal companions. This market has expanded rapidly as pet ownership increases globally and owners increasingly view their pets as family members deserving of inclusion in travel experiences. From dedicated hotel rooms with pet amenities to airline cabin allowances and pet-friendly dining establishments, the tourism industry is adapting to meet the needs of travelers unwilling to leave their furry, feathered, or scaled family members behind.

Market Dynamics:

Driver:

Humanization of pets and the pet parent phenomenon

Increasing numbers of pet owners now consider their animals as integral family members, fundamentally shifting expectations around travel inclusion. This cultural change means owners actively seek vacations where pets are welcomed rather than left in kennels or with sitters. Hotels, airlines, and tour operators have responded by eliminating restrictive policies and adding pet-specific amenities such as beds, bowls, welcome treats, and even pet room service menus. The emotional bond between owners and pets drives willingness to pay premium rates for pet-friendly options, creating a lucrative niche that traditional hospitality providers cannot afford to ignore in competitive markets.

Restraint:

Inconsistent regulations across destinations

Varying international and regional rules regarding pet travel create significant barriers for owners planning cross-border trips. Quarantine requirements, microchipping standards, rabies vaccination documentation, and import permit processes differ substantially between countries, often requiring months of advance preparation. Some popular destinations maintain outright bans on certain breeds or species, while others impose complex health certification requirements that add cost and administrative burden. This regulatory fragmentation discourages spontaneous travel and reduces the addressable market, as potential travelers may choose pet-free trips or staycations rather than navigate confusing and time-consuming compliance procedures.

Opportunity:

Expansion of pet-friendly luxury and boutique accommodations

Upscale hospitality brands are increasingly recognizing that affluent pet owners desire premium experiences for their animals as well as themselves. Luxury hotels now offer dog spas, gourmet pet menus prepared by executive chefs, personalized walking services, and even pet concierges who arrange local veterinarian visits or pet-sitting. Boutique properties differentiate themselves through unique offerings such as catio garden access, bird-safe outdoor aviaries, or small mammal exercise areas. This premiumization trend drives higher spending per traveling pet owner and encourages property owners to invest in pet-specific infrastructure, expanding overall market capacity and attracting previously underserved high-net-worth travelers seeking inclusive luxury experiences.

Threat:

Property damage and liability concerns for hospitality providers

Fear of pet-related damages and potential legal claims continues to discourage some accommodation providers from fully embracing pet-friendly policies. Scratching, soiling, chewing, and noise complaints from other guests create operational risks that translate into higher insurance premiums and cleaning costs. Some properties respond by imposing substantial pet fees or restricting room assignments to specific floors, limiting availability and frustrating travelers. High-profile incidents involving dog bites or allergic reactions have resulted in lawsuits, making some hotel chains hesitant to expand pet programs. These concerns may slow investment in pet-friendly infrastructure, particularly in regions with less developed liability frameworks for animal-inclusive hospitality.

Covid-19 Impact:

The pandemic dramatically accelerated pet ownership rates while simultaneously reshaping travel preferences toward domestic road trips and private accommodations. Lockdown-induced pet adoptions created millions of new pet-owning households, expanding the addressable market for pet-friendly tourism overnight. As restrictions eased, travelers favored car-based journeys over air travel, making pet inclusion more practical. Vacation rentals with private outdoor spaces became preferred over crowded hotels, with platforms like Airbnb reporting surges in pet-friendly filter usage. This behavioral shift has proven durable, with post-pandemic travelers continuing to prioritize pet inclusion and property owners responding by retrofitting spaces to welcome animal guests long-term.

The Dogs segment is expected to be the largest during the forecast period

The Dogs segment is expected to account for the largest market share during the forecast period, reflecting both the global prevalence of canine ownership and the logistical feasibility of traveling with dogs. Dog owners represent the majority of pet-owning households in most markets, creating substantial demand for dog-inclusive travel options. Unlike cats or smaller pets, dogs readily accompany owners on outdoor adventures such as hiking, beach visits, and camping trips, activities that form the core of many leisure travel itineraries. Hotels and airlines have primarily designed their pet policies around canine travelers, offering dog-specific amenities like walking areas and waste stations. This established infrastructure reinforces the segment's continued

dominance throughout the forecast timeline.

The Families segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Families segment is predicted to witness the highest growth rate, driven by the rising prevalence of multi-pet households and the desire for inclusive vacations that accommodate both children and animals. Family travelers increasingly seek accommodations offering space, privacy, and outdoor access where both young children and pets can be accommodated without disturbing other guests. Vacation rentals, cottages, and campgrounds appealing to family travelers are rapidly adding pet-friendly designations, recognizing that parents are unwilling to choose between family vacations and pet care arrangements. Marketing campaigns highlighting pet-inclusive family experiences resonate strongly with millennial parents who view pets as siblings to their children, accelerating adoption across this traveler profile.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by one of the highest rates of pet ownership globally and a mature hospitality industry responsive to consumer preferences. The United States alone has over 85 million pet-owning households, creating enormous domestic demand for pet-friendly accommodations, airlines, and attractions. Extensive road trip culture and well-developed national park systems further encourage canine-inclusive travel. Major hotel chains including Kimpton, La Quinta, and Best Western have built brand identities around pet-friendliness, while airlines like Southwest and JetBlue offer favorable pet policies. This established ecosystem, combined with high disposable incomes, ensures North America maintains market leadership.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapidly rising pet ownership rates in emerging economies and a burgeoning middle class with increasing travel aspirations. Countries including China, India, and South Korea have witnessed explosive growth in pet humanization, particularly among urban millennials who view pets as family. Domestic tourism infrastructure is rapidly adapting, with boutique hotels in Thailand, Japan, and Vietnam launching pet-friendly rooms and cafes. Government initiatives promoting domestic tourism recovery post-pandemic have included pet-friendly policy reforms. As international travel resumes and Asian travelers seek pet-inclusive experiences

modeled on Western markets, the region emerges as the fastest-growing frontier for pet-friendly tourism.

Key players in the market

Some of the key players in Pet-Friendly Tourism Market include Airbnb Inc., Booking Holdings Inc., Expedia Group Inc., Tripadvisor Inc., Marriott International Inc., Hilton Worldwide Holdings Inc., IHG Hotels & Resorts, Wyndham Hotels & Resorts Inc., Accor SA, Best Western International Inc., Delta Air Lines Inc., American Airlines Group Inc., United Airlines Holdings Inc., Southwest Airlines Co., Royal Caribbean Group, Carnival Corporation & plc, TUI Group and Thomas Cook India Limited.

Key Developments:

In April 2026, Booking.com partnered with DogPack, the world's largest social platform for dog owners, to integrate pet-friendly accommodation searches directly into the DogPack app. The integration links Booking.com's inventory with over 130,000 parks and beaches, allowing users to plan entire pet-centric itineraries seamlessly.

In December 2025, Airbnb reported that pet-friendly rentals in top-tier urban markets earned between 12% and 90% more than similar non-pet-friendly listings, leading to a surge in hosts updating their house rules to allow animals.

In October 2025, Hilton confirmed that its 2026 expansion of the Home2 Suites brand into Western Europe would maintain its 'Pets Are Welcome' (PAW) policy, providing a consistent pet-friendly extended-stay option in new markets like London and Dublin.

Service Ecosystems Covered:

Transportation services

Accommodation services

Pet care and support services

Travel facilitation services

Tourism and leisure experiences

Insurance and protection services

Pet Types Covered:

Dogs

Cats

Birds

Exotic and small mammals

Traveler Profiles Covered:

Solo travelers

Couples

Families

Group travelers

Booking Modes Covered:

Online booking platforms

Offline booking channels

Trip Scopes Covered:

Domestic travel

International travel

Travel Purposes Covered:

- Leisure tourism
- Business travel
- Medical and wellness travel
- Adventure and experiential travel

Price Categories Covered:

- Budget segment
- Mid-range segment
- Luxury segment
- Premium pet-specialized offerings

Regions Covered:

- North America
 - United States
 - Canada
 - Mexico
- Europe
 - United Kingdom
 - Germany
 - France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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