



THE STATE OF THE PAW POUND 2026

A Market Report on the Economic Impact of Northern Ireland's Dog Owners

01. Executive summary

In 2026, being dog friendly is no longer a niche offering. It is a commercial decision.

Across the UK, household structures are changing and consumer priorities are shifting with them. A large and highly intentional group of customers now plan where they eat, travel and socialise based on whether their dog is genuinely welcome. At Best Bark, we refer to this spending power as the **Paw Pound**.

Northern Ireland is uniquely placed within this shift. With the highest rate of dog ownership in the UK, the Paw Pound is not a marginal audience here. It is a core driver of footfall, loyalty and repeat spend.

This report outlines the demographic changes behind the Paw Pound, how dog owner behaviour is reshaping hospitality, and why businesses that offer clarity and genuine welcome consistently outperform those that simply tolerate dogs.

02. The Demographic Pivot: Dogs Over Diapers

The makeup of the modern household is changing. Recent reporting from the Office for National Statistics and national media highlights a clear shift. In many UK urban areas, dogs now outnumber children under the age of five. For a growing number of Millennial and Gen Z households, the dog is the primary dependent, and lifestyle spending reflects that reality.

This is not a temporary delay of parenthood. Around four in ten Gen Z and Millennial adults now state they prefer pets over children, citing cost, flexibility, and lifestyle alignment, according to aggregated UK sentiment research and lifestyle surveys conducted between 2023 and 2025.

Northern Ireland amplifies this shift more than any other region. According to recent Dogs Trust and UK Pet Food data:

- **The 44% Factor:** Approximately **44% of households in Northern Ireland** own at least one dog—the highest density in the UK.
- **The Multi-Dog Home:** NI also leads with an average of **1.43 dogs per household** (compared to a UK average of 1.36).

This means the Paw Pound in NI is not a niche segment; it represents nearly half of your potential local customers. They prioritise places where their dog can join them, not be accommodated as an afterthought.

UK Regional Dog Ownership Comparison (2025/2026)		
Region	% of Households Owning a Dog	Market Intensity
Northern Ireland	44%	Critical / Primary Market
Wales	34%	High
Scotland	32%	Moderate
North East England	30%	National Average
South East England	27%	Selective
Greater London	9%	Niche



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THE STATE OF THE PAW POUND 2026: NI Economic Impact Report

EXECUTIVE SUMMARY

2026: 'Dog-Friendly' is a Primary Economic Driver, Not a Niche.

Northern Ireland is uniquely positioned to lead UK hospitality.

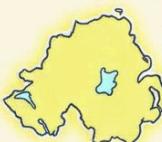
2. DOGS OVER DIAPERS

Urban Shift



In major hubs, dogs now outnumber children under 5 (ONS Data).

The NI Factor (Dog Capital of UK)



44%

Households Own a Dog

1.43 Dogs per Home
(vs UK Avg 1.35)

3. DEATH OF GUESSWORK



1. Search Filters as Gatekeepers
"Dog-friendly" is a top 3 booking filter.
No clarity = invisible venue.



2. The Best Bark Effect
76,000+ Page Views,
32,400 Unique Visitors
verifying data.

3. The Loyalty Premium
Genuine welcome leads to
25% longer stays & 80%
more likely to recommend.

4. CLARITY WINS



Tolerance
(Uncertainty Kills Trust)



Genuine Hospitality
(Clarity Drive Spend)



The Hierarchy of Needs

Amenities (Treats/Menu)
Staff Attitude (Greet dog first)
Water & Space to Settle

5. TRANSPORT AS GATEKEEPER



NI Railways
Clear off-peak rules.
Confident travel.



48%
of owners struggle finding routes,
unlocking city centre economy.



Translink Bus/Metro
Inconsistent rules.
High friction.

6. THE INBOUND OPPORTUNITY



2025 PET TRAVEL SCHEME

Frictionless Travel unlocked NI as primary
'Staycation' destination for UK's 13.5m dog owners.



7. INTERNAL IMPACT (HR)



82%
Boost in
Recruitment



88%
Higher
Retention



Lower Stress
(Cortisol
reduced 10%
in 15 mins)

8. RISK MANAGEMENT & BOTTOM LINE

Clear Zones & Hygiene Standards fulfill Duty of Care.

THE BOTTOM LINE

The Paw Pound represents 44% of the NI market. In 2026, businesses
that thrive actively **WELCOME** dogs, rather than just allow them.



Source Data: Best Bark Insights 2025, ONS, Dogs Trust, OpenTable.

03: Consumer Behaviour: The End of Guesswork

Modern dog owners behave differently than traditional hospitality customers. They research, they plan ahead, and they filter aggressively. Data from **OpenTable** shows that "dog-friendly" has become one of the most frequently used search filters and booking questions. If a venue is not clearly marked, it is often excluded before it is even considered.

This shift is reflected clearly on the ground:

- **Best Bark Data:** Last year, our platform recorded over **76,000 page views** from **32,400 unique users**—all actively searching for verified dog-friendly places in NI.
- **The High-Value Guest:** Industry research suggests dog owners stay **25–30% longer** in venues where they feel welcome. When a dog is settled, the owner is more likely to order that second coffee or dessert.

04. Hospitality vs tolerance. Why clarity wins

Dog owners can spot tolerance instantly.

Phrases like

“Dogs are allowed outside”

“As long as it’s quiet”

“Depends on the day”

create uncertainty. And uncertainty **kills trust**.

When expectations are not met, owners do not complain loudly. They simply do not return.

When expectations *are* met, the opposite happens. Owners stay longer, spend more, and recommend venues to other dog owners. **Loyalty follows clarity**.

This is why verified signals matter. Clear categorisation and visible confirmation remove friction and move customers from research mode into spending mode.

Hospitality begins before the door is opened.

05. The infrastructure gap. Getting there matters

The Paw Pound does not exist in isolation. Owners need to be able to move confidently through the city.

Transport remains a key barrier in Northern Ireland.

NI Railways provides clear off peak guidance for travelling with dogs, allowing owners to plan journeys with confidence. Bus and Metro services, operated by **Translink**, remain inconsistent, often relying on individual discretion.

This lack of clarity creates friction. And friction reduces movement.

When owners cannot plan transport reliably, they limit where they go. This restricts footfall, particularly into city centres, and keeps spending local rather than mobile.

Improving clarity around transport is not a lifestyle issue. It is an economic one.

06. The Inbound Opportunity: The 2025 Pet Travel Scheme

The "Paw Pound" is no longer just local. As of **June 4, 2025**, the new **Northern Ireland Pet Travel Scheme** has fundamentally changed tourism in the region.

- **Frictionless Travel:** Residents of Great Britain can now travel to NI with a free, lifelong "Pet Travel Document." The removal of expensive vet certificates and rabies vaccinations has unlocked NI as a primary "staycation" destination for the UK's 13.5 million dog owners.
- **The Economic Unlock:** Previously, many GB tourists left their dogs behind due to cost and bureaucracy. Now, they are bringing them and their spending power directly into our hotels, cafes, and retail spots.

07. Internal Impact: Dog-Friendly as an HR Strategy

In an era of recruitment challenges, your dog policy is a powerful tool for staff retention and morale.

- **Recruitment Gains:** Recent 2025 studies show that **82% of businesses** with dog-friendly policies see a significant boost in recruitment.
- **The Loyalty Factor:** Employees in dog-friendly workplaces are **88% more likely** to stay with their company for the next year.
- **Wellbeing:** Interaction with dogs in the workplace has been proven to lower stress (cortisol) levels by up to **10%** in just fifteen minutes.

08. Risk Management: Safe & Managed Hospitality

We believe that hospitality must be managed, not just allowed. Addressing safety head-on is a key part of the Best Bark standard.

- **Public Liability:** Most standard business insurance covers dog-related incidents, provided the business has a clear, documented "Pet Policy."
- **The Best Bark Guardrail:** Our verification process helps you fulfill your "Duty of Care." By establishing clear zones (e.g., dog-free areas for those with allergies) and hygiene standards, you protect your business, your staff, and your guests.
- **Professional Standards:** We move you away from "accidental" dog-friendliness toward a professional framework that mitigates risk while maximizing the "Paw Pound" return.

The bottom line

The Paw Pound reflects how people live and spend today. Dog owners are high intent customers who reward businesses that remove uncertainty. In Northern Ireland, where dog ownership reaches 44 percent, this is not a niche audience but a dominant share of the market.

Dogs are no longer companions. They are dependents. And dependents shape spending.

In 2026, the businesses that thrive will not be those that quietly allow dogs, but those that clearly and confidently welcome them.

Methodology and sources

- **Best Bark Insights:** Internal platform usage and search behaviour (Jan–Dec 2025).
- **Demographic Data:** Office for National Statistics, Dogs Trust National Dog Survey 2024/2025, and national media analysis on declining birth rates and rising dog ownership.
- **Regional Statistics:** UK Pet Food Population Report and PAW Report 2024/2025 (Northern Ireland dog ownership at 44%).
- **Consumer & Lifestyle Sentiment:** Aggregated UK lifestyle and pet ownership research from YouGov, Mintel, and national media reporting (2023–2025), reflecting shifting attitudes toward pets, parenthood, and household structure.
- **Hospitality Behaviour:** OpenTable press findings on dog friendly search and booking behaviour.