



Digital Paws in Hospitality: Integrating Yomashi into Portugal's Pet-Friendly Hotel Industry

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ABSTRACT

The thesis explores Yomashi, an innovative platform in the pet care sector, aiming to transform this traditionally informal and less digitized industry into a structured, reliable marketplace. With technology pervading every life facet, the pet service industry is ripe for digital metamorphosis, and Yomashi stands at this transformation's helm. By offering a centralized platform, Yomashi intends to bridge the service gap between pet owners and providers, especially in Portugal where pets are increasingly seen as family members. The platform facilitates easy access to various pet services, ensuring quality care for pets and a seamless user experience for the pet parents. This narrative extends into a proposal for Yomashi's foray into the Portuguese hotel sector, envisioning a synergy between pet care and hospitality to enrich pet-owning guests' experience. Through meticulous market analysis and an exploration of potential partnerships and service models within the hotel industry, the thesis delineates a business blueprint aimed at establishing Yomashi as a conduit for superior pet care services in hotels. The underpinning objective is to foster a win-win scenario, augmenting the hotel experience for pet-owning guests while unlocking new growth corridors for Yomashi. Through surveys and interviews with pet owners and hoteliers, and an examination of pet-friendly accommodation trends, the thesis seeks to chart a pragmatic pathway for Yomashi's expansion, ultimately contributing to the broader narrative of digital transformation within the pet service sector.

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ABSTRACTO

A tese aborda a Yomashi, uma inovadora plataforma de cuidados com animais de estimação, visando transformar esta indústria tradicionalmente menos digitalizada em um mercado estruturado e confiável. Com a penetração da tecnologia em todos os aspectos da vida, o setor de serviços pet está pronto para uma revolução digital, com a Yomashi liderando essa transformação. A plataforma centralizada visa conectar proprietários de animais e prestadores de serviços, especialmente em Portugal, onde pets são vistos como parte da família. Yomashi facilita o acesso a diversos serviços pet, promovendo cuidados de qualidade e uma experiência fluida para os donos. A proposta se estende ao setor hoteleiro português, criando uma sinergia entre cuidados com animais e hospitalidade, melhorando a experiência de hóspedes com pets. Através de análises de mercado e exploração de parcerias no setor hoteleiro, a tese propõe um modelo de negócios para integrar a Yomashi em hotéis, visando uma experiência aprimorada para hóspedes pet e crescimento para a plataforma. Pesquisas e entrevistas com proprietários de animais e hoteleiros, junto com a análise de tendências de acomodações pet-friendly, direcionam a expansão da Yomashi, contribuindo para a transformação digital no setor de serviços para animais.

Título: Patas Digitais na Hotelaria: Integrando Yomashi na Indústria Hoteleira Pet-Friendly em Portugal

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Palavras-chave: Yomashi, Plano de Negócios, Empreendedorismo, Serviços de Cuidado Animal, Transformação Digital, Mercado Português

Table of Contents

<i>List of Figures</i>	5
List of Tables	5
1. Introduction	7
1.1 <i>About the company</i>	7
1.2 <i>Research background</i>	8
1.3 <i>Objectives and Methodology</i>	10
2. Literature review	12
2.1 <i>Human-Animal Interaction</i>	12
2.2 <i>Multisided Platforms: A Digital Marketplace Paradigm</i>	13
2.3 <i>Digital Transformations and Business Collaborations in Pet-Friendly Services</i>	13
2.4 <i>Synthesizing established approaches: an exploration of existing business collaborations</i>	14
2.5 <i>Strategic Management and Competitive Advantage in the Pet Care Industry</i>	15
3. Research Framework	16
3.1 <i>Research design</i>	16
4. Market Analysis and Environmental Scanning	18
4.1 <i>Desk Research: Scope and Findings</i>	18
4.1.1 <i>Global growing sector and economic impact</i>	18
4.1.2 <i>Travelling with Pets: Insights and Implications</i>	20
4.2 <i>Pet-Friendly Services in the Hospitality Industry</i>	21
4.2.1 <i>Current State of Pet-Friendly Accommodations Worldwide and in Portugal</i>	21
4.2.2 <i>Portugal's Accommodation Sector and Identification of Service Gaps</i>	23
5. Empirical Findings from Qualitative Research	24
5.1 <i>Methodology and Data Collection</i>	24
5.2 <i>Qualitative Data Analysis Method</i>	25
5.3 <i>Target Interviewee Profile Summary</i>	26
6. Discussion of Qualitative Insights	27
6.1 <i>Data analysis approach</i>	27
6.2 <i>Synthesis and Strategic Recommendations</i>	32
8. Conclusion and Future Research	35
8.2 <i>Limitations and Considerations</i>	38
<i>Bibliography</i>	39
<i>Appendix</i>	43

List of Figures

Figure 1 - Research diagram 18

List of Tables

Table 1 - Research Overview 18
Table 2 - Travelling with Pets: A Glimpse into the Pet Owner Perspective, Source: Adapted from Kongtaveesawas et al.(2020), Alves et al. (2022) 23
Table 3 - Summary of Interviewee Profiles. Source: Interview Data 27
Table 4 - Hotel policies Source: Interviews data 30
Table 5 - Competitive Landscape..... 35

Preface

In writing this dissertation, I have been fortunate to receive invaluable support and assistance. My first expression of gratitude goes to Professor Rute Xavier, whose expertise and incisive feedback were instrumental in refining my thought process and elevating the quality of my work.

I also extend my heartfelt thanks to the founders of Yomashi. Their willingness to collaborate provided me with a unique and enriching opportunity. Their trust and continuous support throughout the project were not only encouraging but also pivotal to its success.

I extend my deepest gratitude to my family: to my mother and grandparents, for their unwavering love and support. Their faith in me has been a source of strength and inspiration.

I would also like to express my hopes for the future, particularly regarding my boyfriend, who has been my pillar throughout this journey. I hope he will be part of my future, as this dissertation marks not just an end, but also the beginning of many more adventures and successes we may share together. His unwavering support has been a guiding light, and I look forward to what the future holds for us.

1. Introduction

1.1 About the company

Yomashi, a budding entrant in the pet care industry, embarks on a journey to uplift the standards and accessibility of pet care through its innovative digital platform. Launched in July 2023, the company aspires to establish itself as a unified marketplace, streamlining essential services and driven by a deep-seated passion for pets and a firm belief in technological solutions. With a fresh and modern approach, Yomashi navigates through the industry, gradually carving its presence and aiming to build a solid reputation amongst its clientele and peers.

Embarking on a mission to strategically digitize and monetize the pet care industry, Yomashi introduces a user-friendly multi-sided platform that seamlessly blends ease of use with reliability, thereby carving out new revenue channels and fostering structured growth within the sector. Rather than leaning on high-end technologies, Yomashi's distinction emanates from its dedication to forming a trustworthy conduit between service providers and pet owners, ensuring that the latter can effortlessly manage their pets' welfare through a dependable network.

Yomashi crafts a dual-faceted platform, attentively serving both pet owners and service providers. For pet owners, the platform allows smooth navigation, communication, and engagement with an array of providers through a straightforward and intuitive user interface. On the flip side, it offers service providers a centralized professional hub, complete with exclusive insurance options, opportunities for professional development, and specialized rate packages, all aimed at enhancing their operational capabilities and customer reach.

One of Yomashi's standout features is its commitment to quality and reliability. The company adopts a screening process, wherein each service provider is interviewed and vetted by the Yomashi team. This ensures that every provider within the platform adheres to a high standard of service, thereby safeguarding the reliability and quality that Yomashi aspires to be synonymous with. Consequently, pet owners can entrust their beloved animals to providers with confidence and peace of mind, bolstered by Yomashi's endorsement and the transparent user-review system available on the platform.

The evolutionary trajectory of Yomashi has been significantly sculpted and enriched through its active participation in various acceleration programs. Insights derived from seasoned

mentors and the accessibility to a robust network of industry cognoscenti have not only fortified Yomashi's journey but also enhanced its innovative offerings within the pet care industry. In its pursuit to serve beyond mere service provision, Yomashi aspires to uplift the entirety of the pet care sector by proffering professional development pathways. This ensures that those vested in a career within pet care have requisite access to fundamental resources and opportunities, enabling them to burgeon into premium service providers within Portugal.

1.2 Research background

Since time immemorial, the bond between humans and their pet companions has been profound, manifesting a relationship that has woven dogs seamlessly into the familial tapestry, providing companionship, affection, and an enriched sense of self-worth to their owners (Salmon & Salmon, 1983; Frohlich, 2002). In recent times, the age-old trend of pet owners travelling with their dogs has evolved, witnessing a marked shift towards a more accommodative stance on pet needs within the hospitality sector. Eager to harness this persistent trend, hotels have initiated the creation of dog-friendly environments and have even embarked upon launching distinctive programs to encourage guests to bring along their canine companions (Carr & Cohen, 2009). Nonetheless, this upward trend ushers in a myriad of challenges and potential liabilities that could potentially overshadow the ancillary revenue streams, compelling hoteliers to instate stringent pet policies as a mitigative measure (Rooney & Smith, 1996).

Despite the progressive acceptance and adaptations instituted by the hotel industry, academic explorations within this domain conspicuously linger in scarcity. While some extant studies—which shall be scrutinized more meticulously in subsequent sections of the text—have spotlighted the desires of dog owners to vacation with their pets and the discernible gap between their aspirations and reality, they have also probed into the responsiveness of the tourism accommodation sector towards pet owners' needs and surveyed the burgeoning growth of the dog-friendly hotel industry (Dotson et al., 2011). This context presents a fertile domain for scrutinizing attitudes towards pets within hotel settings, a subject that remains underexplored to date.

Positioned against this backdrop, the heart of this thesis palpably thrives on architecting a potential business development strategy, meticulously designed to navigate Yomashi's entrance into the Portuguese hotel sector. Yomashi aspires to interlace its specialized expertise with the

hospitality sector, unveiling a catalogue of premium services for guests who are pet owners, and navigating through new developmental pathways in the industry.

This thesis aims to develop a robust business development strategy to facilitate Yomashi's entry into the Portuguese hotel sector. Yomashi's unique proposition is not just to act as a service provider but as a strategic outsourcing partner for hotels. This approach enables hotels to integrate pet accommodation and services seamlessly into their existing offerings, catering to the growing market of pet-owning travelers.

Yomashi positions itself as a critical facilitator in the hospitality landscape. Its role is to provide comprehensive pet care and accommodation services, which hotels can offer to their guests without needing to invest in creating pet-friendly environments themselves. This model alleviates the need for hotels to handle the complexities of managing pet care services directly. Instead, Yomashi, with its expertise and specialized platform, steps in to fill this niche.

The business model of Yomashi is twofold:

1. **Direct Service Provision:** Yomashi directly offers pet-sitting and care services, handling all aspects from staffing to operations. Hotels collaborate with Yomashi to provide these services to their guests, enhancing their service portfolio without the added operational burden.
2. **Platform for Service Providers:** Alternatively, Yomashi operates as a platform where independent pet care providers can offer their services. In this model, Yomashi acts as an intermediary, connecting hotels with these providers. This approach allows hotels to offer a variety of pet care options to their guests, while Yomashi manages the coordination and quality assurance.

In both scenarios, Yomashi requires collaboration with hotels as it enhances the visibility and accessibility of pet care services to travelers. While pet owners can access Yomashi services directly, partnering with hotels provides a unique channel to reach a wider audience, ensuring convenience for travelers who wish to avail pet care services within their chosen accommodation.

The research will rigorously explore:

- The willingness and readiness level of hotels in Portugal to integrate pet-sitting and care services provided by Yomashi.

- The perceived barriers and opportunities identified by hoteliers in collaborations with a pet care service provider like Yomashi.
- How partnerships between Yomashi and hotels can be structured for mutual operational and financial benefit.

1.3 Objectives and Methodology

The investigative framework for this study is rooted firmly in the perspectives of hoteliers within the Portuguese hotel market. Exclusively exploring the interests, preferences, and receptivity of hoteliers regarding the incorporation of various pet-friendly services and potential partnerships with Yomashi, the study unfurls with a robust exploration of the Portuguese hotel market. Dissecting its trends, specifically in pet-friendly accommodations and understanding the prevailing traveler demand for pet services, the research employs detailed surveys and interviews with hoteliers. The ambition is to peek into the corridors of service model preferences and to unearth those hotels that demonstrate a potential openness towards innovative pet-friendly initiatives and strategic partnerships.

To explore the various ideas for integrating Yomashi's services into hotels, we will hypothesize several innovative approaches:

- **Room Hotel Pet Sitting Services:** This service primarily aims to offer a convenient and immediate care solution for pets within the secure confines of the guest's hotel room. It involves deploying a professional pet sitter to attend to the pets for a specified duration, without providing overnight stays. The sitters would follow a predefined schedule, adhering to the pet owner's guidelines regarding feeding, play, and rest while ensuring that the pet is comfortable and safe. This concept essentially enables pet owners to engage in activities outside the hotel, such as exploring the city or attending events, with the assurance that their pets are being cared for.
- **Individual Pet Care (Walks/Feeding/Playtime):** This offering diverges from the first by focusing on specific, individualized pet care activities rather than a blanket pet-sitting service. Here, Yomashi staff could be summoned on a per-activity basis, for example, for a scheduled dog walk, a feeding session, or a dedicated playtime, outside the Hotel. This could appeal to pet owners who prefer to manage most of their pet's care but seek support for particular activities or at times when they are unavailable.
- **Extended In-Room Care:** The extended in-room care offering shifts towards a longer-term and more holistic care solution for pets, tailored for guests who are embarking on

an extended stay at the hotel. Unlike the first service, here, a Yomashi pet sitter would reside within the hotel providing continuous care, companionship, and attention to the pets for prolonged periods. This would not only ensure that the pet's routines are maintained but also offer consistent companionship, minimizing the potential stress or anxiety that pets might experience in a new environment and in the absence of their owners.

Following the scrupulous assimilation and analysis of data, insights will be amalgamated into a strategic business development plan, characterized by a genuine reflection of the market's realities and potentialities. The plan will articulate tangible service models, carve out potential avenues for hotel collaborations, and chalk out adept marketing strategies. The focus sharply pivots towards understanding the genuine willingness and pragmatic interest within the Portuguese hotel industry for integrating Yomashi's offerings, ensuring that the business development trajectory is conscientiously anchored in actual market possibilities and hotelier perspectives, and providing a solidified platform upon which Yomashi can contemplate its future endeavours in the industry.

Embarking upon a methodological journey, interviews with hotel managers, owners, and staff will be meticulously designed and executed, delving deep into the realms of organizational receptivity, foreseen challenges, and opportunities inherent in the deployment of pet-friendly services. Encompassing both open and closed-ended questions, conversations will strike a balance, being both structured and allowing room for expansive dialogues. Sequentially, these discussions will be recorded, transcribed, and channelled through a thorough thematic analysis, utilizing qualitative data analysis software wherever possible, to amalgamate both common and unique insights, thereby fashioning a well-informed decision-making pathway.

2. Literature review

Chapter 2 delves into a comprehensive examination of literature, exploring the nuances of human-animal interactions and the paradigm shifts brought about by multisided digital platforms in the marketplace. It intricately examines digital transformations and business collaborations, with a spotlight on digital platforms like Yomashi, highlighting their transformative impact on pet care services and illustrating their initiatives in Portugal. Particularly, the intersections between digital pet care services and the hospitality industry are thoroughly explored, weaving an insightful dialogue around this convergence within the existing literature.

2.1 Human-Animal Interaction

Human-animal interactions, spanning disciplines such as psychology and sociology, illuminate pets as pivotal household members due to various psychological and sociological dynamics.

From a psychological perspective, pets offer substantive emotional boons, diminishing feelings of loneliness and fostering a plethora of social interactions (McConnell et al., 2011; Wells, 2007). This dynamic has therapeutic ramifications, with Animal-Assisted Therapy (AAT) emerging to harness these benefits in treatment paradigms, enhancing emotional, cognitive, and physical functionalities (Kruger & Serpell, 2010).

Sociologically, pets have traversed from being working partners to revered family members, a transition underpinned by anthropomorphism and reflecting shifts in societal structures such as diminished family sizes and enhanced urbanization (Hirschman, 1994; Power, 2008). The institutionalization of pets as a family is evident in legal domains, with some jurisdictions acknowledging pets' emotional value in legal conflicts (McNicholas et al., 2005).

Despite the clear psychological and physical health advantages of pet ownership, including increased physical activity and decreased heart disease risk (Walsh, 2009; Levine et al., 2013), it does introduce financial and logistical challenges. These encompass tangible costs for upkeep and care, time commitments, and travel constraints related to accommodating or organizing care for pets (Gračner, 2015; Cutt et al., 2007; Collis & McNicholas, 1998). The evolution of the hospitality sector, now more considerate of pets as family members, echoes the significance and complexity of the human-animal bond in modern society (Taeckens et al. 2023).

2.2 Multisided Platforms: A Digital Marketplace Paradigm

The advent of multi-sided platforms (MSPs) has notably reshaped various service industries by innovating traditional business models, and the pet care sector is no exception. MSPs serve as digital ecosystems that enable interactions among various stakeholders, significantly enhancing collaboration and creating a symbiotic relationship between service providers and users. (Teece et al., 2022)

Within the pet care industry, MSPs facilitate a versatile and efficient platform where pet parents and pet care service providers intersect. For pet owners, these platforms become a one-stop-shop, offering seamless access to a myriad of services like grooming, veterinary care, and pet-sitting with enhanced communication and transactional ease. Conversely, for providers, it becomes a centralized hub that not only magnifies their visibility among potential clients but also avails tools and opportunities that can elevate their professional capabilities and operational efficiency.

The strategic application of MSPs in this context encapsulates the creation of robust network effects, where the value of the platform amplifies with each additional participant, be it a service user or provider. It harmonizes the multifaceted demands of pet owners and the services offered by providers, ensuring a balanced, efficient, and mutually beneficial environment for all stakeholders. Consequently, this leads to the enrichment of service quality, enhancement of user experience, and promotion of sustainable growth within the industry (Poniatowski et al., 2022).

Each of the three key mechanisms—network effects, curation, and trust—holds unique significance within MSPs. Network effects propel platform value with user augmentation, while curation ensures an optimized, user-centric experience through meticulous selection and organization of providers and content. Trust, engendered through secure and consistent user experiences and transparent operations, intertwines with both network effects and curation, ensuring that users can confidently interact with the platform and its offerings. The interlinkage of these mechanisms is crucial; a deficit in one—like curation or trust—could potentially disrupt the platform’s equilibrium and impede the realization of network effects, signifying their collective necessity in steering the prosperity and endurance of MSPs (Anacka & Lechman, 2023).

2.3 Digital Transformations and Business Collaborations in Pet-Friendly Services

In a digitized era, the integration of online platforms in the pet industry signals a new dawn in comprehensive pet services, addressing a society-wide uplift in quality of life and increasing demand for advanced pet services. The convergence of technology and pet care navigates through traditional challenges of geographical and communication hurdles, presenting solutions that address a wide array of consumer needs.

Exploring this digital pathway, Yang et al. (2022) delve into the mechanisms and potentials within the digitally augmented pet service industry through their study, "Application of Digital Transformation in Pet Accessories Market." Their exploration into the multifaceted digital transformations, demonstrated through critical case studies, highlights how technological and strategic alliances are not merely shaping but considerably advancing the industry via innovative means. (El Idrissi 2021).

Underlining technology's key role, the paper introduces a digitally enhanced pet accessory solution that enables pet owners to efficiently monitor their pets, supported by intelligent data analytics and communal insights. Envisioning a prosperous path for the pet accessories market, particularly through the lens of digital transformation, the research anticipates a future punctuated by an intensified focus on and demand for technologically adept pet accessories, aiming to enhance both preventive health measures and overall pet wellbeing (Truman., 2021).

2.4 Synthesizing established approaches: an exploration of existing business collaborations

The burgeoning trend of pet ownership and anthropomorphism, particularly among dedicated "pet parents", has precipitated an imperative evolution in service offerings within the hospitality sector. Hotels, navigating this tide, are progressively shifting from being mere "pet-allowed" entities to establishments that exude a genuinely "pet-friendly" ethos, meticulously crafting amenities and experiences that cater to both pets and their owners (Buhalis & Chan, 2023). However, this paradigm shift is not without its complexities, invoking a slew of operational and service challenges that demand a delicate equilibrium between catering to the preferences of pet owners and ensuring the comfort and satisfaction of non-pet-owning patrons.

Luxury hotel chains like Rosewood, The Murray, and Hyatt Centric have commenced alleviating pet restrictions and innovating their offerings, tailoring distinctive services to both pets and their owners, all while grappling with the challenge of enhancing customer service, managing variegated customer expectations, and sustaining operational efficacy. (Buhalis & Chan, 2023).

Specifically, utilizing the service blueprint model, Buhalis and Chan (2023) illustrate a strategic framework instrumental in conceptualizing service design. This involves assimilating crucial components such as physical evidence, customer actions, and both onstage and backstage employee actions and support processes to curate a delicate balance. Consequently, the application of this framework becomes pivotal to ensure that services are not only adeptly tailored to appease the nuanced needs of pet owners but also implemented in a manner that does not infringe upon the experiences of other guests and staff, thereby crafting a hospitable environment that caters comprehensively to the divergent needs of all hotel clientele.

The strategic service diversification and policy adaptability demonstrated by upscale hotels, which seek to accommodate both pets and their owners while maintaining a cohesive and satisfying experience for all stakeholders, serve as a testament to this balance (Azis et al., 2020).

However, it is noteworthy that the adaptability of service blueprints is not merely theoretical. Their practical applicability was prominently witnessed during disruptive events, such as the COVID-19 pandemic, where they underpinned the continuity of service provision amidst unprecedented variabilities. In a parallel vein, pet-friendly hotels must exhibit a commensurate level of flexibility, crafting service models that simultaneously cater to the multifaceted needs of pets and their owners, all while preserving a conducive and harmonious environment for all guests and staff. (Chakraborty. et al.,2023)

Synthesizing these insights illuminates the compelling need for both future research and practical implementations to meticulously navigate the intricate balance integral to pet-oriented hospitality services. This necessitates a thoughtful negotiation between the granular demands of pet owners, the operational implications therein, and the paramount necessity to ensure a harmonious and positively memorable experience for all who traverse the hotel milieu. (Buhalis & Chan, 2023).

2.5 Strategic Management and Competitive Advantage in the Pet Care Industry

Strategically navigating the intricacies of the pet care industry, especially regarding pet-friendly accommodations, demands the meticulous application of theoretical frameworks to sculpt and sustain a competitive advantage amidst fluctuating market dynamics.

Porter's (1980) Five Forces framework, a landmark in strategic management practices, offers an invaluable lens for scrutinizing both industries and competitors, necessitating a thorough analysis of the bargaining power of buyers and suppliers, as well as a comprehensive understanding of the diverse demands of pet owners. In-depth evaluation of suppliers, ranging from pet product vendors to veterinary services, allows discernment of their influence on pricing and operational decisions. Furthermore, an acute awareness of threats, whether from new entrants, substitute services, or existing rivalries, is pivotal, enabling refined strategic positioning and the crafting of compelling unique selling propositions (Dobbs, 2012).

In parallel, the Blue Ocean Strategy, formulated by Kim and Mauborgne (2005), encourages enterprises to navigate toward untapped market spaces—or "Blue Oceans"—eschewing the competitive battlegrounds of saturated "Red Oceans". This strategy steers businesses towards innovation, prompting them to craft unique offerings that differentiate them from conventional services in the prevailing market, thus pivoting from a competitive to a creative stay centred on value innovation. Such an approach not only fosters the provision of distinguished services and experiences but also propels businesses into pioneering new, lucrative niches, mitigating competition and fostering growth and profitability.

On another front, the Resource-Based View (RBV) guides organizations in leveraging intrinsic resources, both tangible, such as financial and technological assets, and intangible, like brand reputation and customer relationships, to forge a sustainable competitive advantage. Within the ambit of RBV, the VRIN framework ensures resources are Valuable, Rare, Inimitable, and Non-substitutable, affirming sustainable competitiveness amidst market tumult (Barney, 1991).

In synthesis, these strategic frameworks provide a robust foundation for pet-friendly accommodations to navigate through the complexities of the industry, underpinning informed decisions that mitigate threats, leverage opportunities, and ensure sustained growth and profitability amidst the dynamic market context.

3. Research Framework

3.1 Research design

In this chapter, we explore the methodologies and data collection techniques utilized to gain a comprehensive understanding of the Portuguese hotel sector's approach to pet-centric

accommodations and services. This examination is crucial for assessing the market dynamics and evaluating the potential integration of Yomashi in this sector.

Our journey begins with an extensive review of secondary data. We engaged with a plethora of industry reports, market analyses, and scholarly articles sourced from prominent databases such as Statista and Euromonitor, along with academic journals via JSTOR and Google Scholar. This stage aimed to encapsulate global and local trends in pet-friendly hotel accommodations, providing a solid foundation for our primary research.

The chapter then transitions into the realm of primary data collection, detailing our meticulous process of conducting in-depth interviews with a diverse range of Portuguese hoteliers. We carefully selected a mix of hotels, ranging from large, renowned chains to quaint, local inns, ensuring a representation of various geographic locations across Portugal. A pivotal selection criterion was the hotels' current engagement with pet-friendly services, aiming to encapsulate perspectives from both pet-accommodating and non-accommodating establishments.

Our interviewees primarily comprised hotel managers or equivalent roles, chosen for their direct insights into operational aspects like room count, staffing, and location specifics. The inclusion of the hotel's name, where allowed, added authenticity and context to our findings. Interviews were conducted both in-person and via digital platforms like Zoom or Microsoft Teams, catering to the convenience and reachability of the participants.

Upon completing the interviews, each session was transcribed verbatim. Qualitative data analysis techniques, including thematic analysis and coding trees, was employed to dissect the data. This methodical approach enabled us to discern recurring themes and patterns, extracting valuable insights into the hoteliers' stance on pet-friendly services and their openness to collaboration with Yomashi.

The comprehensive explanation of these methodologies and their outcomes will be elaborated in the subsequent chapters, providing a detailed narrative of our findings and their implications in the context of Yomashi's strategic objectives in the Portuguese hotel sector.

Research	Aim	Data	Method
I. Desk Research: Understanding the Landscape	To explore the existing data about Portuguese hoteliers' perspectives, market trends, and pet accommodations within the tourism and hotel industry in Portugal.	Secondary data extracted from industry reports, publications, academic articles, and other relevant publications.	Conduct a market analysis of the global and local trends in pet friendly hotel accommodations and market trends. Analyze existing reports and studies with a specific focus on pet-friendly services.

II. Qualitative Analysis: In-depth Insight	To obtain a deeper understanding of hoteliers' perspectives and to explore the nuances of their preferences, challenges, and considerations regarding pet-friendly services.	Primary data obtained through in-depth interviews with a select group of hoteliers in Portugal.	Identify and approach potential interviewees within the hotel industry, ensuring a mix of perspectives (e.g., large hotels, small inns, chain hotels). Conduct semi structured interviews focusing on their experiences, perceptions, and attitudes towards pet-friendly services and Yomashi's proposed offerings. Perform a thematic analysis, identifying key themes, patterns, and insights that emerge from the interview data.
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Table 1 - Research Overview. Source: Interviews data

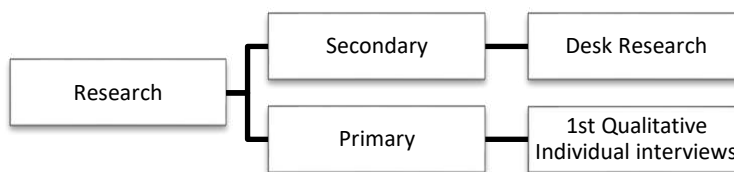


Figure 1 - Research diagram

4. Market Analysis and Environmental Scanning

4.1 Desk Research: Scope and Findings

This section delves into the assimilation of secondary data to provide a foundational understanding of the global and local pet-friendly service market, especially within the hotel industry. The focus is on the economic impact of this growing sector and the cultural trends influencing consumer behavior regarding traveling with pets.

4.1.1 Global growing sector and economic impact

The thriving pet industry, which saw significant growth during the COVID-19 pandemic, signifies a notable macroeconomic shift towards pet humanization, driving ancillary market expansion. This transformation has resonated across various generational demographics, particularly among Millennials and Generation Z. A staggering 73% of pet owners belong to Generation X, Millennials, and Generation Z, with Millennials constituting a substantial 32% of this demographic (Statista, 2023).

Europe has also experienced a surge in pet ownership, with over 88 million households embracing pets in 2020, marking a remarkable 26% increase since 2010. Notably, countries

like Portugal and Spain have shown a remarkable affinity for dog ownership, surpassing the EU average (Statista, 2023).

These statistics go beyond mere numbers; they signify a profound shift within the industry, characterized by discernible trends. These trends include a movement towards premiumization in pet products, a growing demand for innovative pet services, increased expenditure on pet care and treats, and the adoption of e-commerce and Direct-To-Consumer (DTC) models in pet retail. This transformation reflects shifting consumer values emphasizing care, quality, and well-being, spotlighting the pet sector as an ecosystem that champions innovation and exceptional service delivery while sustaining economic vibrancy (Industry Research Biz, 2021).

Delving deeper into the subject, Sloan and Hutt (2021) provide an in-depth exploration of the pet health market, highlighting emerging trends and opportunities. They emphasize the industry's pivot towards wellness, particularly focusing on nourishment and overall well-being. This shift fosters competition and ensures the sector's continuous evolution and financial vitality.

Simultaneously, Torres (2022) sheds light on the significant impact companion animals have had on Portugal's pet market. As global society transitions to a post-pandemic norm, the pet industry, anchored by the intricate relationships between humans and animals, stands poised for continued growth. This growth carries substantial economic implications for both contemporary and future market landscapes.

The pet industry, now a prominent player on the global economic stage, creates numerous opportunities by stimulating economic activity, generating employment, and fostering innovation in service delivery. Its resilience, even amid pandemic-induced economic challenges, underscores its role as a stabilizing economic entity (Industry Research Biz, 2021). In conclusion, the pet industry, driven by a focus on quality, innovation, and animal well-being, emerges as a symbol of enduring growth and economic vitality in a world undergoing transformation in the aftermath of a pandemic. Its trajectory through global markets shapes present and future financial landscapes (Sloan & Hutt, 2021; Torres, 2022).

In a formal examination of pet ownership trends across Europe, Portugal stands out as the leading nation in terms of dog ownership per capita in 2022. According to the European Pet Food Industry Federation's (FEDIAF) "Facts & Figures 2022" report, Portugal boasts an

average of 0.25 dogs per person, surpassing other European countries and solidifying its position as a leader in canine companionship.

Zooming out to the broader context of pet ownership in Europe, 2022 witnessed significant growth in the European pet food market, reflecting a rising demand for pet-related products. This growth highlights the substantial role pets play in European households. Notably, nearly 46% of European households welcomed at least one pet, with cats being the most popular choice, closely followed by dogs.

These insights into pet ownership trends, particularly in Portugal, provide valuable perspectives on the cultural and societal preferences that shape the European landscape of pet companionship.

4.1.2 Travelling with Pets: Insights and Implications

Navigating the multifaceted dimensions of modern travel, families increasingly integrate pets into their holiday planning, spotlighting dogs not merely as companions but as substantial members of the familial unit. Recent research, notably the study by Marmolejo-Martín et al. (2023), propels us into a nuanced exploration of the deepening bonds between pet owners and their canine companions, particularly in the context of travel and tourism. The paradigm within familial structures has pivoted towards an inclusive approach, encompassing pets into their holiday schemes, and thus, inducing destinations to remodel themselves as “dog-friendly” to captivate this expanding market segment.

This transformative dynamic isn't just a matter of the heart; it robustly anchors itself in the financial decision-making processes within families. Dogs, much like children, now wield a notable influence over family vacation planning and destinations, resonating with studies that echo similar sentiments (Chen et al., 2013; Kirillova et al., 2015).

Marmolejo-Martín et al. (2023) delve into this complexity, unearthing insights via methodological research that investigates various facets like pet details, familial attachment levels to the dog, and the sociodemographic profile of the pet owners, with a reassuring Cronbach's Alpha reliability test result of 0.898, signifying the steadfastness of the employed scale.

The empirical findings from the study reveal a linear yet somewhat weak relationship between "APPEAL" (representative of the attachment level between pet and owner) and the propensity to include pets in travel plans. This revelation aligns with the realization that although emotional connectivity with pets does influence travel decisions, it isn't the sole determinant. Such

insights necessitate a detailed examination of potential accommodations and destinations, forecasting how establishments, particularly hotels, might balance the appeal to both pet-owning and non-pet-owning tourists.

Transitioning into the practical realm, this emotional and financial commitment towards pets collides with a tangible challenge: navigating the often perplexing and unreliable world of pet travel advice and regulations, as highlighted by the investigative study by R. K. Davidson and L. J. Robertson (2012). Their study shines a light on a startling deficiency in the provision of accurate travel advice for pet owners, with only a mere 10% of veterinary clinics across nine European countries providing precise advice about traveling with a dog from the EU to Norway. Furthermore, the apparent reliability of secondary information sources, such as government agencies and websites, also crumbled under scrutiny, offering correct advice only 62% of the time.

This dichotomy - between the emotional and financial investment in pet-inclusive travel and the practical, logistical challenges encountered - unveils a compelling narrative. The travel industry stands on the brink of an opportunity to harness the emerging pet travel market, necessitating a harmonious amalgamation of pet-inclusive experiences and a fortified, reliable infrastructure of pet travel information and logistics.

Consequently, the blending of these themes posits a challenge to the tourism industry: crafting experiences that fulfil the desires of pet-loving travelers while ensuring that their journey through the intricate world of pet travel logistics is seamless and reliable. Balancing these aspects—emotional, financial, and practical—is imperative in truly embracing the burgeoning trend of pet-inclusive travel, facilitating not only a viable option for families but also ensuring it is practically navigable and accessible. The industry, thus, finds itself on a pathway that demands not just accommodation of this emerging segment, but a thorough, empathetic understanding of their experiences, needs, and challenges, weaving a future where traveling with pets is not merely a possibility, but a joyfully accessible reality.

4.2 Pet-Friendly Services in the Hospitality Industry

4.2.1 Current State of Pet-Friendly Accommodations Worldwide and in Portugal

Navigating through the transformative landscape of pet-friendly accommodations, a stark evolution is discernible: what was once a mere allowance of pets has matured into a rich tapestry of services that intimately weave into the essence of holistic hospitality (Kirillova et al., 2015). It transcends physical presence, embracing a doctrine where the inherent nature of pets is not just accepted but celebrated, permeating sectors of retail, dining, recreation, and transport. This burgeoning network of services extends tendrils across global vistas, painting a testament to the pivotal role pets now occupy in human lifestyles and emotional landscapes.

The evolving relationship between pets and their human counterparts has expanded beyond mere companionship, emerging as a critical component within the emotional and social dynamics of human life. This bond doesn't merely linger in the daily dance of life but also significantly influences a myriad of consumer activities and decisions, notably within realms of leisure and financial expenditure (Holbrook & Woodside, 2008; Toloni & Duque-Estrada, 2017). The multifaceted nature of this relationship flows into the realms of travel and tourism, reshaping the previously pet-absent picture of vacationing into one where they emerge as true co-travelers and intimate companions.

Pet-friendly service	Rules & regulations	Restrictions
<i>Four Seasons Hotels and Resorts</i>	<ul style="list-style-type: none"> • Cats, dogs, and other domestic animals weighing less than 60 pounds (27 kg). • While in the Hotel, each pet must be kept on a leash when not in the guest's room. <p>Only particular locations:</p> <ul style="list-style-type: none"> • Leashed pets are allowed to dine on Ciclo's outdoor patio, where they're given bowls of water and our house-made dog biscuits. Or a special In-Room Dining pet menu with nutritious items. • Plush beds and Four Seasons bandanas to food bowls filled with gourmet dog biscuits. 	<ul style="list-style-type: none"> • Pets may not be left in guest rooms unattended and must be well-trained, as any disturbance of other guests may result in the removal of the pet(s) from the property. • Pets are not allowed inside the Spa, pool, or any food service outlets. • Owners are responsible for any property damage and personal injury their pet(s) may cause while in the Hotel.
<i>Sheraton Hotels & Resorts</i>	<ul style="list-style-type: none"> • Pets are welcome at more than 295 Sheraton Hotels around the world. • Weight limit of 80 lbs with an additional fee ranging from free to \$100 per stay. • Most locations feature pet relief areas, and several offer treats, water bowls, and dog beds. 	<ul style="list-style-type: none"> • Not all locations are dog-friendly, and fees and weight restrictions may differ from property to property. • Pets may not be left unattended in rooms.
	<ul style="list-style-type: none"> • Some Airlines allow guide and assistance dogs to travel in cabins with owners. 	<ul style="list-style-type: none"> • Any animal that enters in UK from outside of the EU, must stay for four months in quarantine.

<i>Airplane Companies</i>	<ul style="list-style-type: none"> • Animals usually travel in plane's hold meaning, so owners won't have access to them until arrival. • Pets must be microchipped. • They must have valid pet passports provided by the animal's vet and microchip numbers must be recorded (e.g., certificates). • For international travel, dogs must have tapeworm treatment (between 1 and 5 days before travel and it should be recorded on the pet passport/ veterinary certificate detailed). 	<ul style="list-style-type: none"> • Some Airlines have limited number of pets to travel. • Pugs and snub nose breeds (i.e., Persian cats and Pekingese dogs) aren't accepted by some Airlines because they have breathing issues when travelling in altitude. • Many carriers require owners to use a designated pet travel agent.
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Table 2 - Travelling with Pets: A Glimpse into the Pet Owner Perspective. Source: Adapted from Kongtaveesawas et al.(2020), Alves et al. (2022)

4.2.2 Portugal's Accommodation Sector and Identification of Service Gaps

Refocusing our attention on Portugal, a country where the pet-friendly industry, though still in its infancy and under constant examination by researchers, is on a path of continuous development. This emerging sector intertwines the welfare of the pet with the qualitative experiences of the traveler, creating a symbiotic relationship that celebrates the union of pet care and travel experiences. The market is cautiously evolving, reflecting a growing recognition of pets as integral members of the family and travel companions.

Data from the Journal of Tourism, Heritage & Services Marketing in 2022 clearly demonstrates that pets have become a significant part of the domestic landscape in Portugal. Approximately 54% of households, nearly 2 million homes out of a total of 3.869 million, include at least one pet. This statistic not only shows a significant upward trend in the pet population but also indicates an increase in emotional and financial investments in pets. The study by GfK underscores this trend, revealing a shift in perspective where pets are seen as family extensions, leading to deeper emotional and affective connections between pets and their owners.

However, the 2020 study by Prata JC, titled "Strategies for the Improvement of Pet Health and Welfare in Portugal Based on a Pilot Survey on Husbandry, Opinion, and Information Needs," published in *Animals (Basel)*, sheds light on certain challenges in pet ownership and welfare in Portugal. It reveals that, while most pets are adopted, many potential owners are discouraged from adopting from animal shelters due to bureaucratic hurdles. Additionally, veterinary services are perceived as expensive, and compliance with pet identification laws, such as microchipping, is often overlooked. These issues highlight the need for societal interventions and underscore the importance of strategies that aim to enhance pet health and welfare in Portugal.

As the pet-friendly industry in Portugal continues to develop, there's a significant opportunity for the accommodation sector to adapt and evolve. The growing trend of pet ownership calls for a transformation in services to cater to pet owners, including pet-friendly amenities, spaces in accommodations, and partnerships with local veterinary services. This evolution in the accommodation sector not only meets the changing needs of travelers with pets but also contributes to the overall welfare and care of pets.

In conclusion, the integration of pets into the fabric of Portuguese society, as seen in the rising numbers of pet-owning households and the growing pet-friendly industry, presents both challenges and opportunities. Addressing the issues of pet adoption, veterinary care costs, and compliance with identification laws are essential for improving pet welfare. Simultaneously, the accommodation sector in Portugal has a unique chance to lead in offering innovative services that cater to pet owners, thereby enhancing the travel experience and supporting the bond between pets and their owners.

5. Empirical Findings from Qualitative Research

5.1 Methodology and Data Collection

In this segment of the thesis, we delve into a methodical examination of how the Portuguese hotel industry can embrace pet-centric offerings, aligning with the trend of considering pets as integral to the family. Through meticulous desk research, we assimilate secondary data from industry analyses and scholarly articles, which will illuminate the prevailing trends in pet-friendly hospitality, both within Portugal and internationally. This comprehensive overview will shed light on the current state and potential of Portugal's hotel sector in integrating pet services.

Complementing the desk research, we engage in qualitative inquiry through in-depth interviews of 10 hoteliers across Portugal. Ranging from grand establishments to quaint inns, these conversations aim to unearth the intricacies of incorporating pet services and to assess hoteliers' openness to partnering with Yomashi. This dual-stranded research approach is designed to offer a multifaceted view of the potential synergies between the hospitality industry and specialized pet service providers, like Yomashi, within the Portuguese context.

The in-depth interviews aim to tap into the rich perspectives and insights of hotel operators, exploring their experiences, expectations, and any challenges they foresee in offering pet-

friendly services. By utilizing semi-structured interviews, we ensure that while each conversation is guided by a consistent set of questions, there remains ample flexibility to explore emergent themes and to delve deeper into each respondent's unique viewpoint. This method facilitates the gathering of nuanced data, allowing for a more tailored and in-depth understanding of each stakeholder's stance on integrating pet services into their operations.

To identify suitable interview candidates, we employ theoretical sampling, focusing on individuals who are most likely to provide insightful contributions to the research question. This includes hoteliers with firsthand experience in pet-friendly offerings or those who have demonstrated interest in such initiatives. The thesis outlines an interview guide with open-ended, non-leading questions, along with more directed inquiries, enabling a balanced and thorough exploration of the topic. The guide also allows for the integration of spontaneous questions to address specific aspects that arise during the discussions, thereby enhancing the richness and relevance of the collected data.

The research targets 10 interviews, ensuring a manageable scope for detailed analysis while capturing a diversity of experiences and views. The selected participants will reflect the varied landscape of Portugal's hotel industry, offering a representative sample of the sector's current engagement with and the potential for pet-friendly services. Through this rigorous qualitative research, the thesis will contribute valuable insights into the strategic development of Yomashi's platform and its role in advancing the digital transformation of the pet service sector within the realm of Portuguese hospitality.

5.2 Qualitative Data Analysis Method

In the field of qualitative research, the practice of codifying and categorizing is central to the analysis and interpretation of data. To codify is to arrange information systematically, making it a part of a structured classification system. This process enables researchers to segregate, group, regroup, and link data to consolidate meaning and explanation. As elucidated by Grbich (2007) and Bernard (2010), the essence of analysis lies in identifying patterns in data and exploring the underlying reasons for these patterns.

Our coding process is a method that organizes and groups data into categories based on shared characteristics, marking the beginning of pattern formation. This process involves both systematic classification and the researcher's tacit and intuitive understanding of the data.

The approach to coding is iterative and reflective, signifying a continuous refinement and thoughtful consideration process. This method allows for the possibility of recoding and recategorizing as more data is gathered, leading to a deeper and more nuanced perspective on the subject.

The term "iterative" implies that coding is not viewed as a one-time, linear process, but rather as involving cycles of coding, revisiting, and refining codes and categories. This approach acknowledges that understanding evolves over time as the research delves deeper into the data. Additionally, the coding approach is "reflective," involving thoughtful contemplation and analysis of the coded data. It considers how initial codes and categories may require adjustment or expansion based on emerging insights or patterns observed during the research process.

This re-evaluation process, in line with Punch's (2009) research findings, aligns with the development and subdivision of major codes and themes. Ultimately, this iterative and reflective approach enhances the understanding of the complex dynamics surrounding pet-friendly hotel accommodations in Portugal, capturing the richness of the data and adapting the coding framework to accommodate new insights and nuances.

Building on the established methodology of codifying and categorizing in qualitative research, this part aims to apply these techniques to an exploratory study of the Portuguese hotel sector's approach to pet-centric accommodations and services. The research will utilize a blend of desk research and in-depth interviews to delve into the dynamics of pet-friendly hotel accommodations in Portugal.

5.3 Target Interviewee Profile Summary

Role	Number of Interviews	Type of Hotel	Key Responsibilities	Relevance to Research
General Manager	3	Luxury Hotel Boutique Hotel Business Hotel	Overall hotel operations	Insights on strategic and operational integration of pet services.
Department Managers	4	Boutique Hotel Business Hotel Business Hotel Budget Hotel	Specific operational areas	Practical challenges and opportunities in pet services.

Sales & Marketing Manager	3	Boutique Hotel Bed and Breakfast (B&B) Hostel	Branding, marketing strategies	Market positioning and customer expectations for pet services.
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Table 3 - Summary of Interviewee Profiles. Source: Interview Data

All interviews were conducted with a strong emphasis on ethical considerations, including confidentiality and informed consent of participants. Practical aspects like the timeline for data collection and available resources were also carefully planned.

The analysis of interview data was conducted using a coding structure, as outlined in Appendix 2. This approach allowed us to systematically identify and interpret key themes and patterns emerging from the interview responses, providing a structured and insightful analysis of the perspectives and experiences of the interviewees.

6. Discussion of Qualitative Insights

6.1 Data analysis approach

In this chapter, we delve into the data analysis approach employed to extract valuable insights from the interviews conducted with hotel personnel regarding pet-friendly services. The qualitative data analysis process was essential in uncovering patterns, themes, and perspectives that inform our understanding of the integration of pet services within the Portuguese hotel sector.

Before delving into the analysis, it is important to recap the data collection process. A diverse spectrum of hotel personnel, including General Managers, Department Managers, and Sales & Marketing Managers, were interviewed. These interviews provided a rich source of qualitative data, offering unique perspectives on pet-friendly services in hotels.

The qualitative data analysis approach was systematically conducted to ensure a comprehensive understanding of the collected data. The following steps outline the analytical process: The initial step in the analysis process involved the transcription of all interview sessions. Each interview was transcribed verbatim to maintain the integrity of the spoken words. Subsequently, a preliminary reading of the transcriptions was conducted. This preliminary phase aimed to familiarize the researcher with the data and gain a holistic on the content.

Following the preliminary reading, the transcribed interviews underwent a rigorous coding process. The objective was to categorize the data into meaningful groups or segments. Initial

codes were generated to label and classify discrete pieces of information within the transcripts. These codes served as the building blocks for subsequent analysis. Once the initial coding was completed, the focus shifted to identifying patterns and recurring themes within the data. This phase involved an examination of the coded segments to discern common ideas, concepts, or issues that emerged consistently across different interviews. Identifying patterns was instrumental in uncovering shared perspectives and challenges related to pet-friendly services (Appendix 2).

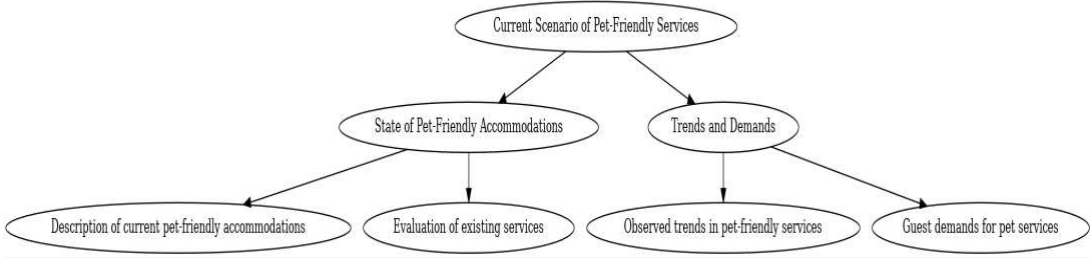


Figure ii - Coding tree extract

Building upon the identified patterns, the next step involved the development of broader themes. These themes encapsulated clusters of related codes and represented overarching concepts within the data. Thematic development allowed for a deeper exploration of the interviewees' perspectives and experiences concerning pet-friendly services in hotels. The themes provided a structured framework for analysis.

In the final phase of the analysis, the themes were interpreted in the context of the research objectives. This involved a critical examination of the themes to extract meaningful insights. The interpretations were based on the collective perspectives of the interviewees and aimed to shed light on the feasibility, challenges, and strategic implications of integrating specialized pet care services into hotel offerings.

The findings derived from the qualitative data analysis are presented in Chapter 6.2, where key insights and observations are discussed in detail. This rigorous analytical approach ensured a thorough exploration of the interview data, contributing to a comprehensive understanding of the diverse perspectives of hotel personnel regarding pet-friendly services.

The thematic analysis of interviews with hotel personnel on pet-friendly services in Portugal reveals a nuanced landscape in how hotels approach this aspect of hospitality. There is a considerable variation in pet policies across different hotels. While some establishments

welcome pets under specific conditions, others maintain a strict no-pets policy. This diversity in approaches indicates a broader trend of accommodation for pet owners, varying significantly from one hotel to another.

Many pet-friendly hotels designate specific areas for pets and enforce certain restrictions, such as limiting access to dining areas and controlling pet presence in common spaces during peak hours. This strategy reflects an effort to balance pet accommodation with the comfort and convenience of other guests. Additionally, the communication of pet policies is a consistent practice, with hotels making their policies clear through various channels, including websites, during the reservation process, and at check-in. This trend is evident in both pet-friendly and non-pet-friendly hotels, highlighting a focus on transparency.

Furthermore, some hotels offer additional services and amenities for pets, which can range from special pet menus and grooming services to adventure packages. This indicates a move towards more comprehensive pet care within the hospitality industry. On the other hand, hotels that do not accommodate pets often provide alternative solutions, such as suggesting nearby pet-friendly facilities or accommodations. This approach shows a consideration for the needs of pet owners, even when the hotel itself cannot meet those needs.

Weight and size restrictions for pets in some hotels suggest a concern for maintaining manageable and safe environments within hotel facilities. In the higher-end market segment, there's a noticeable trend of luxury pet services, catering to pet owners seeking premium experiences for their pets.

Overall, these insights point to a hospitality industry that is increasingly recognizing the importance of pets in guests' lives. The industry exhibits a range of accommodation levels and services, tailored to meet the diverse needs of pet owners, demonstrating a significant shift in how pets are integrated into the travel and hospitality experience.

Hotel	Pet-friendly policies based on insights that have been gathered from interviews:
Lisboa Amma Hotel	<ul style="list-style-type: none"> - Pets up to 15 kg allowed. - Must use designated pet areas. - Pets not allowed in the restaurant area.
Vila Galè Coimbra	<ul style="list-style-type: none"> - No weight limit on pets. - Pets must be on a leash in public areas. - Additional fee for pet accommodation.
Stay Hotel Lisboa	<ul style="list-style-type: none"> - No pets allowed. - Clear policy communicated on the hotel website and during reservation.

	Staff trained to provide information on nearby pet accommodation facilities.
Coimbra City Comfort	<ul style="list-style-type: none"> - No pets allowed in the hotel. - Alternative pet-friendly accommodation suggestions provided in the hotel's information booklet. <p>Guests reminded of the policy during the check-in process.</p>
Neya Hotel	<ul style="list-style-type: none"> - No pets allowed. - Guests are informed upon booking and check-in about the no-pet policy. - Signage placed in the hotel reiterating the no-pet policy.
Faro Family Retreat	<ul style="list-style-type: none"> - Pet beds and bowls provided. - Special pet menu for in-room dining. - Restrictions on pets in common areas during peak hours.
Évora Estate & Spa	<ul style="list-style-type: none"> - Luxury pet services, including grooming. - Pets must be registered at check-in. - Spa and fitness center off-limits to pets.
Braga Boutique B&B	<ul style="list-style-type: none"> - Pets under 10 kg allowed in select rooms. - Pet amenities include toys and treats. - No pets in the dining area during mealtimes
Madeira Mountain Manor	<ul style="list-style-type: none"> - Offers pet adventure packages. - Pets must be leashed on hiking trails. - Pets not allowed in indoor pool areas
Oceanfront Oasis	<ul style="list-style-type: none"> - Pets allowed with no size restrictions. - Pet lifejackets available for boating activities. - Pets are not allowed on certain beaches due to wildlife protection.

Table 4 - Hotel policies. Source: Interviews data

Interviews conducted at various facilities provide a nuanced understanding of the current landscape of pet-friendly facilities and the potential for Yomashi integration. These discussions reveal a wide range of attitudes and policies towards pet placement, which opens the door to potential partnerships with specialist service providers.

Hotels with existing pet-friendly policies show an openness to improving their service offering. A partnership with an external pet service provider could complement current services by introducing innovative options such as in-room pet spa treatments, personalized pet dining experiences crafted by animal nutritionists, and unique pet recreation activities. Such amenities

would cater to the growing demographic of travelers who seek luxury and comfort for their animal companions as an integral part of their travel experience.

On the other hand, facilities that currently implement strict anti-pet policies could still benefit from a strategic alliance. By aligning itself with a dedicated pet care provider, it could offer its guests premium pet lodging solutions externally, adding value and convenience without the need to change existing hotel policies. This approach would allow these facilities to subtly tap into the pet owner market, offering the best of both worlds: keeping their environment pet-free while providing solutions to pet owners.

Interest in such partnerships extends to properties that emphasize outdoor experiences and adventure. A pet services partnership could curate specialized outdoor excursion packages, ensuring that pets are not just accommodated but actively included in the travel experience with safety and comfort as top priorities. This could include pet-friendly hiking guides, pet safety equipment rentals for various activities, and even pet photography services to capture memories made during your stay.

The feasibility of incorporating a third-party pet service into the hospitality experience is further underlined by the ability to create distinctive marketing campaigns and packages. Hotels could market themselves as all-inclusive destinations for pet owners, offering tiered packages ranging from basic to luxury amenities. This approach could benefit both direct bookings and ancillary revenue streams.

Staff and management express a keen awareness of the unique strengths that such partnerships could offer. It is widely believed that pet owners constitute a significant and growing market segment and catering to their specific needs can lead to greater customer satisfaction, loyalty and word-of-mouth marketing. The potential of a pet services partnership to enhance a hotel's brand identity and loyalty among pet-loving travelers is seen as a compelling opportunity.

Additionally, a partnership with a pet service provider isn't just about adding services, it's about embracing a philosophy that recognizes pets as integral members of the family. This shift in mindset can transform a hotel's brand image into one that is inclusive, empathetic, and attentive to the nuances of modern travel needs.

Among hotel professionals, there is an evident desire to explore collaborations with pet service providers. Such partnerships could be the key to unlocking a niche market segment, improving the guest experience, and increasing overall sales. The hotel industry is at the cusp of this pet-friendly revolution, ready to embrace innovative solutions that respond to the ever-evolving demands of travelers who wish to include their pets in their trips.

6.2 Synthesis and Strategic Recommendations

In this section, we present key insights from interviews conducted with a diverse range of hotel personnel, including General Managers, Department Managers, and Sales & Marketing Managers. These interviews offered invaluable perspectives on integrating pet-friendly services within the Portuguese hotel sector.

General Managers highlighted the feasibility and potential revenue generation of integrating pet-friendly services. "We've seen a noticeable uptick in inquiries about pet accommodations. There's a real opportunity here not just to meet demand, but to open up a new revenue stream that could significantly boost our competitiveness," one General Manager remarked. This sentiment reflects a growing demand among travelers for pet accommodations and a recognition of the competitive edge these services could provide.

Department Managers, on the other hand, pointed out practical challenges such as ensuring cleanliness, managing guest-pet interactions, and staff training. "Implementing pet-friendly services does bring its unique challenges, particularly in maintaining cleanliness and ensuring all guests feel comfortable. It's about striking the right balance in our operations," a Department Manager noted. These challenges highlight the operational intricacies hotels need to address when implementing pet services.

Sales & Marketing Managers stressed the importance of effective marketing strategies. "Our pet-friendly policy isn't just a service; it's a key part of our brand identity now. We're reaching out to a whole new market segment of pet owners who don't want to leave their furry friends behind," a Sales & Marketing Manager explained. This approach underlines the need for strategic branding and positioning to attract pet-owning travelers.

The consensus among interviewees revealed a gap in current offerings of Portuguese hotels, with the primary service extended to pet owners being merely the allowance of pets in guest rooms. This limited approach suggests that while hotels have accommodated pets, they have yet to fully embrace a comprehensive range of pet-friendly services.

Operational challenges and a possible lack of understanding of pet owners' specific needs were cited as reasons for this gap. However, there is a shift towards a more guest-centric approach in response to the growing market potential for pet-friendly services. "Understanding the specific needs of our guests, especially those traveling with pets, is crucial. We're looking at everything from the booking process to in-room amenities to make their stay as comfortable as possible," a Department Manager stated.

There was also an expressed willingness among hotel personnel to explore strategic collaborations with specialized pet service providers like Yomashi. "Partnering with specialized pet service providers like Yomashi is something we're actively exploring. It's about enhancing our service offerings while managing operational complexities effectively," a General Manager shared. This openness to collaboration indicates a receptiveness to innovative approaches within the industry.

The importance of guest satisfaction, both for pet owners and non-pet owners, was a recurring theme. Positive guest experiences were deemed essential for the success of pet-friendly services. Additionally, interviewees emphasized the need to understand and adhere to regulatory considerations related to pet services.

General Managers also discussed the revenue potential of pet services, noting that competitively priced services could significantly contribute to the hotel's revenue. "Pet services, priced appropriately, can be a significant contributor to our hotel's revenue. It's not just about accommodation fees, but the ancillary spending on pet-specific services," a General Manager explained.

Operational efficiency was another key area highlighted by Department Managers. Streamlining processes and staff training were pointed out as essential for smooth operations in pet-friendly areas. Market segmentation was also a focus, with Sales & Marketing Managers emphasizing the potential to target specific pet-owning traveler segments.

Interviewees across roles recognized that embracing pet-friendly services could provide a competitive advantage and differentiate them in the market. Customizable pet services, such as pet grooming or in-room amenities, were highlighted as ways to enhance the guest experience. Finally, the importance of employee engagement in delivering pet-friendly services was noted, underscoring the role of staff training and motivation in the success of these services.

In addition to the interviews conducted with hotel managers, the research also involved insightful conversations with Alexandra Ventura, who serves as the Executive Director of Nova

SBE Westmont Institute of Tourism & Hospitality. Ms. Ventura's expertise in the field of hotellerie and her profound knowledge of customer requests added significant depth to our study. Her contributions were particularly valuable in shedding light on the intricate workings of the hospitality industry, with a specific focus on understanding customer preferences and their evolving expectations. These interactions played a pivotal role in enhancing the comprehensiveness of our research, providing nuanced insights, and enriching our understanding of the subject matter.

The interviewees' emphasis on the value of a guest feedback loop underscores the importance they place on continuously improving pet services. They recognize guest feedback as a crucial tool for refining their offerings, indicating a commitment to adapting and enhancing their services based on direct customer input. This approach highlights the hotels' dedication to evolving their pet-friendly services in line with guest expectations and experiences.

In addition to these insights, it's worth noting the expressed interest in exploring external services like Yomashi. Although the specifics of such interests weren't delved into in the interviews, this curiosity points towards a willingness to collaborate with specialized pet service providers. Such collaborations could potentially enrich the variety and quality of pet-friendly services offered by these hotels, addressing some of the operational challenges and expanding the scope of amenities available to pet-owning guests.

Integrating services from external providers like Yomashi could offer a solution to some of the operational complexities identified by the Department Managers, such as staff training and maintaining cleanliness. It might also align with the Sales & Marketing Managers' strategies for targeting specific segments of pet-owning travelers and enhancing the overall guest experience.

Overall, these additional insights, along with the interest in external services like Yomashi, provide a comprehensive view of the multifaceted considerations surrounding the integration of pet-friendly services within the Portuguese hotel sector. They contribute to a deeper understanding of the challenges and opportunities that hotel personnel perceive in relation to pet services, indicating a sector that is both recognizing its current limitations and actively seeking innovative solutions.

In the dynamic and growing pet care market of Portugal, a diverse array of facilities offers a plethora of services aimed at enhancing the well-being and happiness of our beloved animals.

This table represents a curated selection of premier pet care establishments, each offering unique environments and specialized services designed to cater to the multifaceted needs of pets and their owners. From the coastal retreats providing oceanfront play to the rural havens offering natural landscapes, these facilities prioritize comprehensive care and the highest standards of service.

The comparison encompasses a variety of attributes such as the type of facilities available (indoor, outdoor, or a combination of both), the level of supervision provided, the availability of individual space for each pet, and the range of daily care activities. Group playtime opportunities and behavioral modification services are also considered, offering insights into the tailored experiences each location can provide. This competitive landscape offers a window into the innovative approaches these facilities employ to ensure that every pet receives the care, attention, and stimulation they need to thrive.

FACILITY NAME	INDOOR/OUTDOOR FACILITY	SUPERVISION	INDIVIDUAL SPACE	DAILY CARE	GROUP PLAYTIME	BEHAVIORAL MODIFICATION
DÁ-ME TRELA, ANIMAIS DE ESTIMAÇÃO	Indoor/Outdoor with Play Areas	24/7	Yes	Walks, Feedings, Medicine	Yes	On Request
ECODOGS & CO LODGE & SPA	Indoor Luxury/Outdoor Natural	24/7	Yes	Organic Feedings, Spa Treatments	Yes	Advanced Training
PET SITTING BICHARADA	Indoor Cozy/Outdoor Rural	Day & Night	Yes	Feedings, Exercise Routines	Yes	Behavioral Therapy
DOG PLANET BENFICA	Indoor with Training Facilities	24/7	Yes	Professional Training, Feedings	Yes	Yes
DOG OUTDOOR TODAY	Outdoor Adventure Park	Day Only	No	Guided Walks, Play Sessions	Yes	No
DOG HOSTEL PENICHE	Indoor/Outdoor Oceanfront	24/7	Yes	Beach Play, Feedings	Yes	Yes

Table 5 - Competitive Landscape. Source: Interviews data

8. Conclusion and Future Research

In this research, we embarked on a journey to explore the integration of pet-friendly services within the Portuguese hotel sector. Through in-depth interviews with a diverse group of hotel personnel, including General Managers, Department Managers, and Sales & Marketing Managers, we gained valuable insights into the multifaceted world of pet-friendly accommodations. The qualitative data analysis process unveiled several key findings that shed light on the feasibility, challenges, and opportunities associated with pet services in hotels.

One of the most prominent insights that emerged from our interviews was the strong consensus among hotel personnel regarding the feasibility of integrating pet-friendly services into their existing offerings. General Managers, in particular, displayed a high level of openness to the idea, recognizing the growing demand for pet accommodations among travelers. This recognition extended to an understanding of the revenue generation potential associated with pet services, positioning them as a means to enhance the hotel's competitiveness in the market. Department Managers, while acknowledging the feasibility, highlighted practical challenges that hotels must address when implementing pet-friendly services. These challenges encompassed ensuring cleanliness and hygiene in pet-designated areas, effectively managing guest interactions with pets, and conducting thorough staff training. These insights underscored the operational intricacies that hotels need to navigate to provide a seamless experience for both pet owners and non-pet owners.

Sales & Marketing Managers emphasized the pivotal role of effective marketing strategies in promoting pet-friendly services. They recommended leveraging the unique selling point of being pet-friendly to attract a niche market of pet-owning travelers. These insights highlighted the significance of branding and positioning in capturing the attention of potential guests.

Furthermore, our interviews revealed a strong emphasis on aligning pet services with guest expectations. The interviewees stressed the importance of understanding the specific needs of pet owners, including the provision of pet-friendly amenities and a streamlined booking process. This insight underscored the guest-centric approach required for the successful integration of pet services.

A notable revelation from our research was the willingness of hotel personnel to explore strategic collaborations with specialized pet service providers like General Managers saw such partnerships as a means to enhance the variety and quality of pet services while mitigating operational complexities. This insight indicated a receptiveness to innovative collaborations within the industry, signaling potential future developments.

Throughout our discussions with interviewees, a consistent theme emerged - guest satisfaction remains paramount. Interviewees recognized that positive guest experiences, whether for pet owners or non-pet owners, were essential for the success of pet-friendly services. This insight underscored the need for continuous monitoring and improvement of pet services to meet and exceed guest expectations.

Lastly, interviewees emphasized the importance of understanding and adhering to regulatory considerations related to pet services. This insight highlighted the need for hotels to navigate

legal and safety aspects when accommodating pets, ensuring compliance with relevant regulations.

In conclusion, our research provides a comprehensive understanding of the complex landscape of pet-friendly services in Portuguese hotels. The insights gained from our interviews offer valuable guidance for hotels seeking to embrace pet accommodations while addressing the associated challenges. These findings contribute to the growing body of knowledge in the hospitality industry and open avenues for further research and exploration.

While our research has illuminated various aspects of pet-friendly services in hotels, there are several avenues for future research that warrant exploration:

- **Guest Satisfaction and Experience:** Further studies can delve deeper into guest satisfaction levels and experiences in pet-friendly hotels, including the impact on non-pet owners' experiences.
- **Market Segmentation:** Future research can focus on detailed market segmentation strategies for pet-friendly hotels, considering various traveler demographics and preferences.
- **Collaborative Partnerships:** Investigating the effectiveness and challenges of collaborations between hotels and specialized pet service providers, such as Yomashi, can provide insights into evolving industry dynamics.
- **Regulatory Compliance:** Ongoing research into evolving regulations and legal considerations related to pet services in hotels can help establishments stay compliant and ensure the safety and well-being of guests and pets.
- **Employee Training and Engagement:** Exploring best practices in training and engaging hotel staff to provide exceptional pet-friendly services can contribute to improved guest experiences.
- **Sustainability:** Assessing the environmental impact of pet-friendly services and identifying sustainable practices can align with growing eco-conscious traveler trends.
- **Technology Integration:** Investigating the role of technology, such as mobile apps or in-room devices, in enhancing pet services and guest convenience can be a valuable area of research.
- **Global Comparative Studies:** Comparative studies across different countries and regions can offer insights into cultural variations in pet-friendly services and traveler expectations.

These avenues for future research hold the potential to further enrich our understanding of the evolving landscape of pet-friendly accommodations in the hospitality industry, providing guidance for hotels looking to embrace this growing trend.

8.2 Limitations and Considerations

While our research has provided valuable insights into the integration of pet-friendly services within the Portuguese hotel sector, it is essential to acknowledge certain limitations and considerations that may have influenced the outcomes of this study. These limitations are important for contextualizing the findings and understanding the scope of our research efforts. One of the primary limitations of our study is the sample size of interviewees. While we engaged with a diverse group of hotel personnel, including General Managers, Department Managers, and Sales & Marketing Managers, the total number of interviewees may not fully represent the entire spectrum of perspectives within the Portuguese hotel sector. A larger and more varied sample could provide a more comprehensive understanding of the subject.

Our research primarily focused on the Portuguese hotel sector, which may limit the generalizability of our findings to a broader international context. Pet-friendly services in hotels could vary significantly from one region to another due to cultural, regulatory, and market differences. Future research could consider expanding the geographical scope to encompass a more diverse range of settings.

This study adopted a qualitative research approach, which offers in-depth insights into participant perspectives but may not provide quantitative data for statistical analysis. While qualitative research is valuable for exploratory purposes, it has limitations in terms of generalizability and statistical significance.

The hospitality industry, including the pet-friendly services segment, is dynamic and subject to evolving trends, regulations, and consumer preferences. Our findings reflect the state of the industry at the time of the research, and subsequent developments may have altered the landscape.

Regulatory considerations related to pet services in hotels can vary over time and may impact the feasibility and implementation of pet-friendly accommodations. Our research considered existing regulations, but changes in legislation could influence the landscape.

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Appendix

Appendix 1 Sample Interview Questions for Hotel Managers, Owners, and Staff on Pet-Friendly Service Incorporation

1. Background Information:

Could you briefly describe your role and responsibilities within the hotel?

How would you characterize the current positioning of your hotel within the market?

2. Current Scenario of Pet-Friendly Services:

How would you describe the current state of pet-friendly accommodations and services within your hotel?

Have you observed any specific trends or demands from guests regarding pet-friendly services and accommodations?

3. Receptivity towards Pet-Friendly Services:

How receptive do you believe your hotel is towards expanding or introducing new pet-friendly services, such as in-room pet sitting or extended pet care?

What factors do you believe might influence the hotel's decision to incorporate additional pet-friendly services or partner with an external pet care provider like Yomashi?

4. Perceived Challenges and Concerns:

What challenges or concerns do you foresee in incorporating additional pet-friendly services into the hotel's offerings?

How might these challenges impact both operational aspects and guest experience within the hotel?

5. Opportunities and Benefits:

In your opinion, what opportunities might arise from bolstering the hotel’s pet-friendly services and accommodations?

How might partnering with a specialized pet care provider (e.g., Yomashi) bring value or enhance the guest experience within your establishment?

6. Partnership Exploration with Yomashi:

How do you perceive the potential of forming a partnership with a specialized pet care service provider like Yomashi to enhance pet-friendly offerings within the hotel?

What specific services or offerings from Yomashi might align well with the needs and expectations of your guests?

7. Policies and Regulations:

Could you shed light on any policies, regulations, or standards that might influence the adoption and implementation of new pet-friendly services within the hotel environment?

How might these regulations potentially impact a partnership with an external pet care provider?

8. Customer Expectations and Satisfaction:

How do you balance the expectations and satisfaction of guests who travel with pets versus those who do not?

How might expanding pet-friendly services impact customer satisfaction and loyalty within your current guest demographic?

9. Conclusions and Future Directions

Is there anything else you would like to add or any other thoughts you believe are pertinent to our discussion about enhancing pet-friendly services within the hotel environment?

Appendix 2 Sample Coding Structure for Pet-Friendly Services in Portuguese Hotels

