



THE SILENT BOOKING SIGNAL:
HOW BED BUG SAFETY
RESHAPES HOTEL CHOICE



About the Report

The silent booking signal: How bed bug safety reshapes hotel choice

A PhocusWire Report sponsored by Valpas
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Introduction

Pests—such as bed bugs and roaches—rank as the single biggest concern when travelers in the United States, United Kingdom and France book a hotel, ahead of cleanliness and staff friendliness. A new Phocuswright survey of more than 1,000 leisure and business travelers across the three markets finds that guests have already optimized their booking behavior around this concern, even though hotels rarely hear about it directly. They scan reviews, search for pest mentions, switch properties and check certifications—silently, before the booking is made. And when visible, credible reassurance is introduced as a booking attribute, the same travelers respond with higher consideration, willingness to pay and stronger loyalty.

Pest safety ranks as the top concern when travelers book a hotel, yet the industry treats it as an operational matter rather than a visible booking attribute. Travelers have already adjusted their behavior around this gap, responding to visible, continuous, independent proof with higher consideration, premium willingness to pay and stronger loyalty.

Three findings anchor that claim. First, when asked to rank what a hotel room must offer, respondents placed a guaranteed bed bug–safe room as a top necessity. Second, more than half of travelers inspect their bed for signs of bugs or take other steps on arrival to assure themselves the room is safe, yet only a third feel confident they could identify the insect. Third, when visible bed bug–safe certification is introduced as a booking attribute, between 79% and 84% of respondents say they would book a 4-star certified hotel over an uncertified 5-star property at the same price, all else being equal.

The survey covers 1,082 travelers across the United States, United Kingdom and France, balanced by age, gender and trip purpose, including both leisure and business travelers. It is among the most comprehensive consumer studies on hotel pest perception conducted to date.

The pages that follow examine how the gap between guest priority and industry treatment shows up in booking behavior, willingness to pay, brand loyalty and the cost of inaction— and what changes when visible reassurance enters the booking decision.



Chapter 1:

The invisible concern already shaping bookings

Pest safety is the top booking concern

When asked what matters most when booking a hotel, travelers across all three markets placed pests above cleanliness, staff friendliness and every other attribute tested. The result holds across age groups and trip purposes. It is the cleanest, most consistent finding in the survey.

Guests have already changed behavior

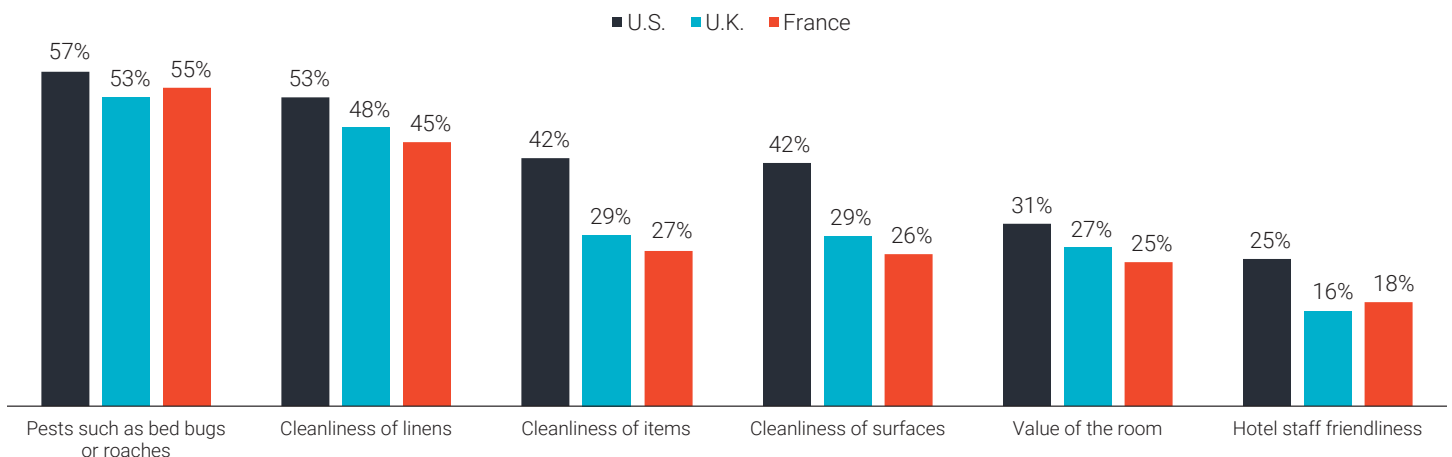
The concern translates into action. Fifty-three percent of U.S. travelers, and smaller but still substantial shares in the U.K. and France, inspect their hotel room for signs of bed bugs on arrival. Inspection routines include checking sheets, the mattress and the headboard.

These behaviors continue after the trip. Travelers report washing clothing on hot cycles, isolating luggage and avoiding bringing soft items into bedrooms once home—protective routines built around a risk they assume the hotel has not eliminated.

Travelers look, but they cannot reliably see

While guests know where to look, the survey reveals a gap between vigilance and capability. Only 32% of U.S. travelers, 19% of U.K. travelers and 12% of French travelers say they feel confident they could identify a bed bug if they saw one. That gap matters: the dominant guest behavior—visual inspection—is performed by people who, by their own assessment, may not recognize what they are inspecting for.

Figure 1: Top booking concerns by market



Question: Please rate your level of concern with each of the following when booking a hotel.

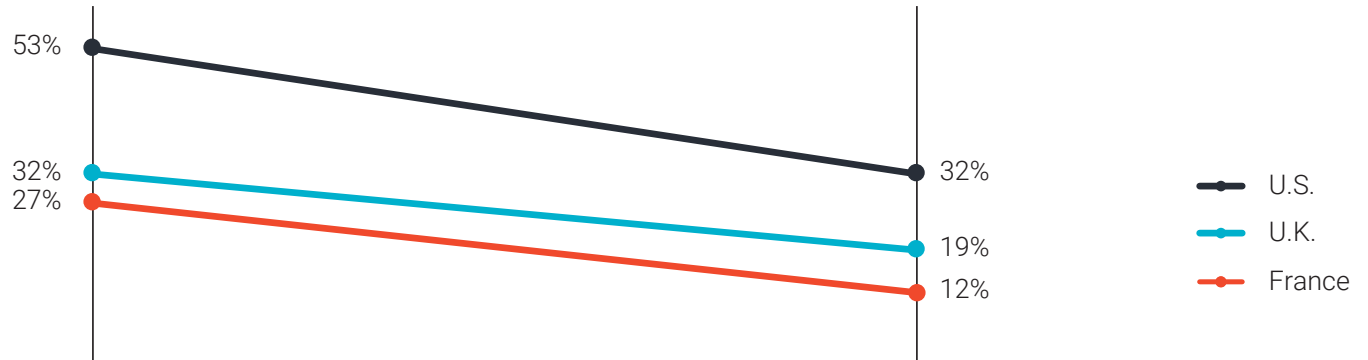
Base: U.S. (N=364); U.K. (N=366); France (N=352)

Source: Traveler's Concerns With Bed Bugs and Valpas Solution Impact

Figure 2: The inspect vs. identify gap

Looked for signs of bed bugs on and around the hotel bed such as the sheets, mattress or headboards

Strongly Agree: "I feel confident I can recognize signs of bed bugs in a hotel room."



Source: Traveler's Concerns With Bed Bugs and Valpas Solution Impact



What exactly is a bed bug?

Cimex lectularius, to give the insect its proper name, belongs to the Cimicidae family, which are parasitic bugs that feed on the blood of warm-blooded animals. *Cimex lectularius* is red-brown in color and the size of an apple seed. Bites are itchy, uncomfortable and can lead to secondary infections. Other risks include allergic reactions, insomnia and anxiety.

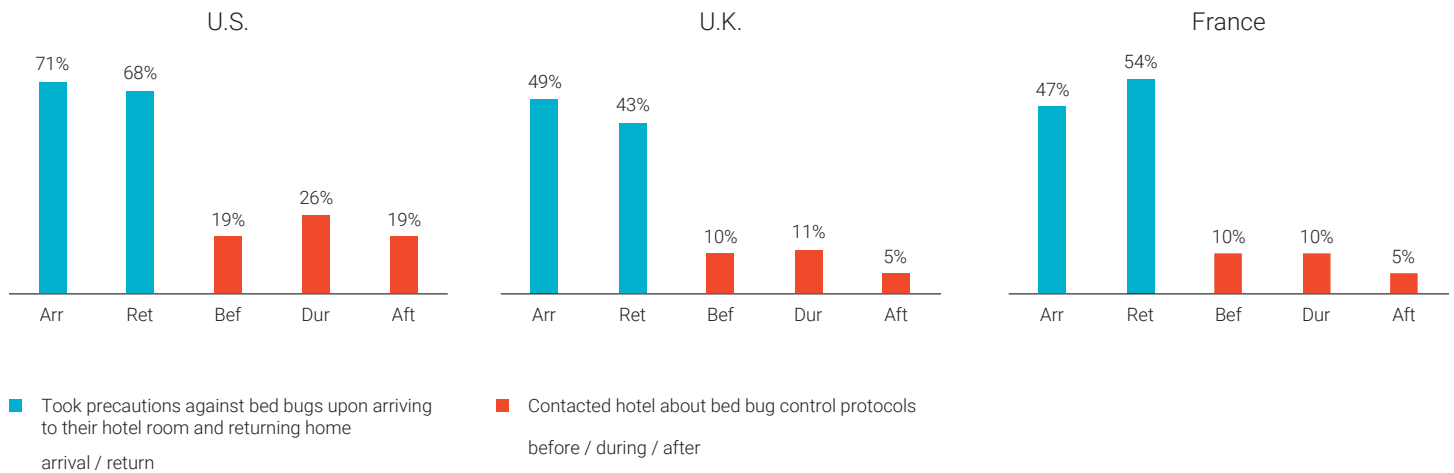
The concern is widely seen as legitimate

Across the three markets, travelers consistently describe bed bug concerns as a realistic part of hotel risk rather than an overblown anxiety. In the U.S., 45% call it a realistic concern; only 16% say it is overblown compared with other travel risks. The pattern holds in the U.K. and France at slightly lower intensity. This is not a fringe worry—it is a mainstream consumer expectation.

The silence gap: guests do not raise it with hotels

Despite the high concern level and the protective routines built around it, travelers rarely raise the issue with hotels directly. Of those who suspected they had encountered bed bugs during a stay, only half contacted the property. Among those who did, 44-55% described raising the topic as extremely or very stressful.

Figure 3: The silence gap—what guests do but don't say



Source: Traveler's Concerns With Bed Bugs and Valpas Solution Impact

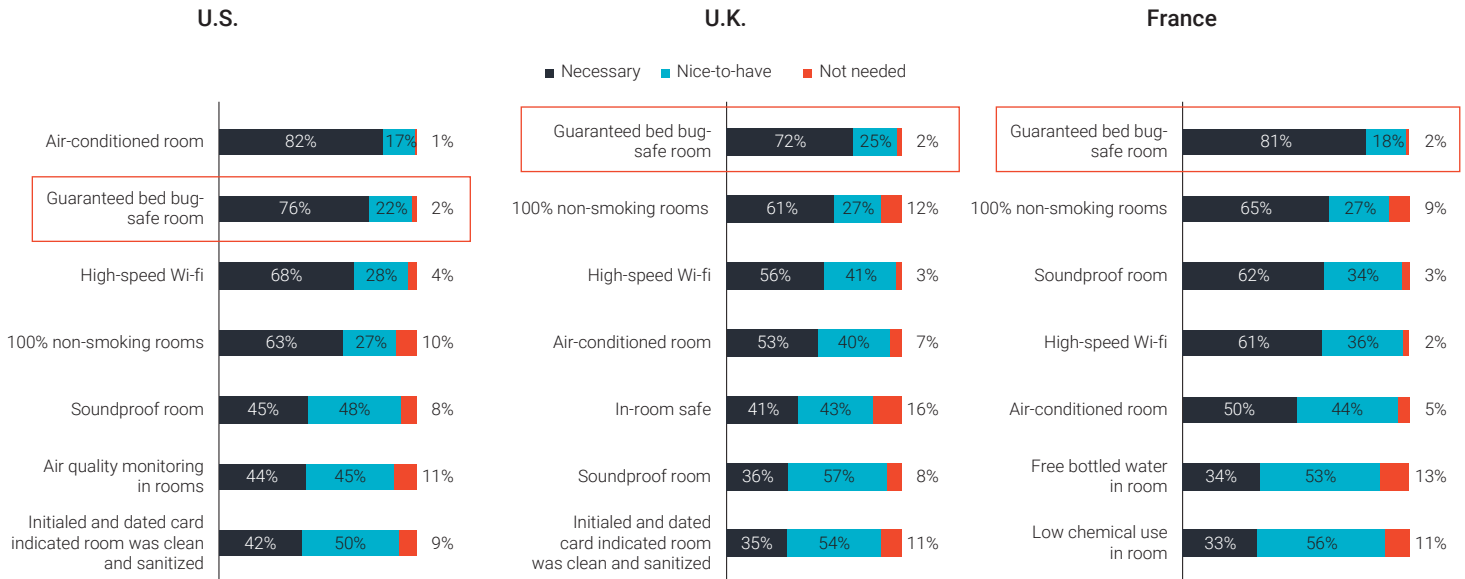


The result is a structural asymmetry. Guests treat bed bug safety as a top booking priority and adjust their behavior accordingly. Hotels hear about it only in the failure cases—after a guest has already chosen the property, encountered a problem and decided whether to complain. The decision-making behavior is invisible to operators.

Already classified as a necessity, not an amenity

When respondents were asked to rank a list of hotel attributes from “nice-to-have” to “necessity,” a bed bug–safe room consistently placed in the top one or two necessities, ahead of strong Wi-Fi, soundproofing and non-smoking rooms. The market is already treating this as table stakes, even as the industry treats it as operations.

Figure 4: Top Amenities Rating



Question: Thinking about the amenities a hotel can offer, for each of the following, please indicate if it is necessary, nice to have or not needed.

Base: U.S. (N=364); U.K. (N=366); France (N=352)

Source: Traveler's Concerns With Bed Bugs and Valpas Solution Impact

A decade of opportunity

"Every decade, hospitality discovers a guest concern it had been quietly mispricing. Smoking in the 1990s. WiFi in the 2000s. Sustainability in the 2010s. Each began as an operational problem and became a commercial, visible standard.

This study shows pests like bed bugs rank as the top concern travelers weigh when booking a hotel, ahead of cleanliness and staff friendliness, and that guests have already reorganized their behavior around it. They scan reviews, inspect rooms, switch brands—silently, because raising the topic is stressful, which is why it's slipped past operators for so long. But the moment visible proof exists, the preference flips: they actively choose the hotels that show it and pay more for the reassurance.

Bed bug safety is the next attribute to make that jump into a verifiable trust standard. The crossing is underway. The question is which hoteliers, OTAs and travel buyers see past the long assumption that visibility creates the risk, and which discover, too late, that the absence of proof has become the risk instead."

Martim Gois

co-founder and CEO, Valpas

Chapter 2:

Why visible proof changes decisions

Chapter 1 established a paradox: a top booking concern that travelers act on individually but never raise with hotels. A reasonable industry response is to ask whether drawing attention to bed bug safety would make travelers more nervous, not less. The survey suggests the opposite. Visible, continuous, independent proof reassures travelers rather than alarming them and shifts measurable booking behavior across price, location, ratings and brand loyalty.

The chapter that follows refers to “visible, continuous, independent proof” or “a trust standard” rather than to any single certification scheme. The findings describe what travelers respond to in general, not what they think of a specific brand.

Visible proof beats assumptions

When visible certification is introduced as a booking attribute, willingness to choose certified properties rises sharply. Between 79% and 84% of respondents across the

three markets say they would book a 4-star independently certified bed bug–safe hotel over an uncertified 5-star property at the same price, all else being equal.

The presence of a visible, third-party trust signal moves the booking decision in favor of the certified property—even when other attributes the industry treats as decisive (star rating, location, user reviews) point the other way.

Visible proof changes trade-offs

The willingness to trade off traditional attributes for visible bed bug–safe proof extends beyond star ratings. Between 63% and 73% of respondents say they would choose a slightly less central hotel if it was independently certified, against 27% to 37% who would opt for a centrally-located property without certification. On user ratings, between 71% and 82% would book a hotel with a user rating of 8.4/10 if independently certified, against 18% to 29% who would book a higher-rated hotel (8.9/10) without certification.

Figure 5: Trade-off When All Else is Equal

4-star hotel independent certified as bed bug-safe	5-star hotel not certified as bed bug-safe
79-84%	16-21%
Slightly less central hotel independently certified as bed bug-safe	Centrally located hotel with no bed bug safety certification
63-73%	27-37%
Hotel with a user rating of 8.4/10, independently certified as bed bug-safe	Hotel with a user rating of 8.9/10, not certified as bed bug-safe
71-82%	18-29%

Question: Which would you prefer? Consider all other criteria equal when making your hotel decision.

Base: U.S. (N=364); U.K. (N=366); France (N=352)

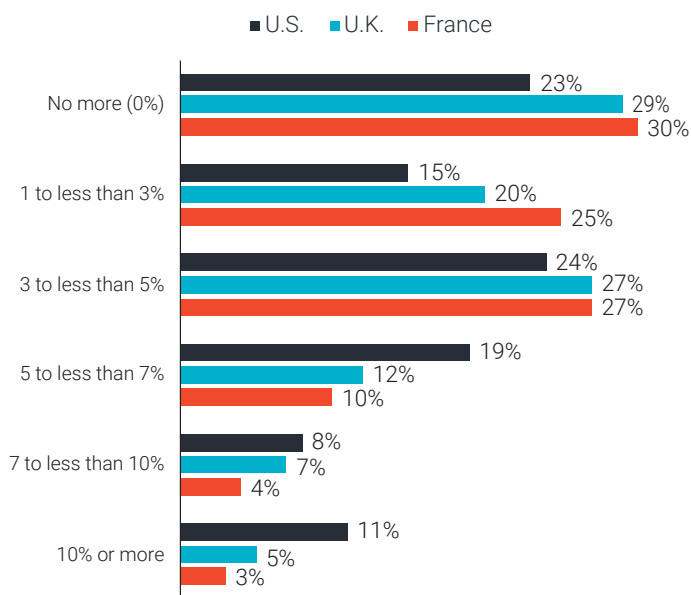
Source: Traveler’s Concerns With Bed Bugs and Valpas Solution Impact

These are not marginal shifts. They suggest the booking decision hierarchy the industry has assumed for decades—location, brand, price, reviews—is being restructured around a trust attribute that does not yet have a visible market position.

Visible proof changes willingness to pay

Across the three markets, roughly 80% of travelers say they would pay more for a stay at a hotel with visible, continuous, independent bed bug safety certification. The most common premium range cited is 3% to 5% of the average daily rate (ADR). Full-market weighted averages—including the 20% who would pay no premium—are 4.0% in the U.S., 3.3% in the U.K. and 3.0% in France.

Figure 6: Additional Amount Willing to Pay for a Guaranteed Bed Bug-Safe Stay



Question: How much more are you willing to pay per night to stay at a hotel that is a certified and guaranteed bed bug-safe stay?

Base: U.S. (N=364); U.K. (N=366); France (N=352)

Source: Traveler's Concerns With Bed Bugs and Valpas Solution Impact

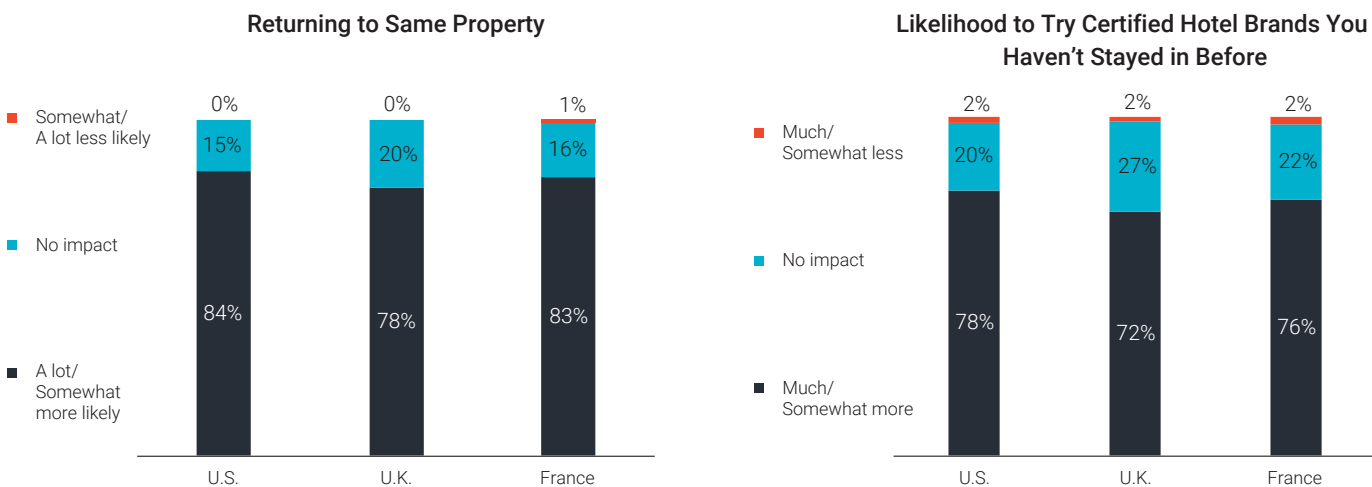


“At Hashnap, traveler well-being isn’t a feature, it’s our foundation. Surfacing independently verified, real-time proof of bed bug safety directly in our search and hotel pages gives our users something priceless: the confidence that every property they consider has been verified at the room level, not just on paper. That’s a promise we’re proud to stand behind.”

Nicola Rizzardini

CEO at Hashnap

Figure 7: Impact on loyalty and willingness to try a new brand



Question: Assume the bed bug-safe certification was available at a hotel chain you typically stay at. For each of the following, how would it change your behavior, if at all?

Base: U.S. (N=364); U.K. (N=366); France (N=352)

Source: Traveler’s Concerns With Bed Bugs and Valpas Solution Impact

Quantifying the industry value-add opportunity

According to a Valpas analysis, if the willingness-to-pay finding were translated into a market-wide commercial opportunity—that is, if visible bed bug safety certification were universally adopted and priced into the ADR—the resulting annual revenue uplift across the three surveyed markets would be approximately €9.5 billion. The figure applies survey-measured full-market premium percentages to published 2024–25 room revenue totals for the U.S., U.K. and France. Valpas’ full methodology is summarized in the Appendix.

The figure represents a conservative ceiling: it models only the ADR premium and excludes any occupancy lift from the loyalty, recommendation and brand-trial findings above, even though those findings suggest meaningful incremental demand would accompany adoption.

Where proof must be visible

Visible, continuous proof only works where the booking decision is made. Travelers want to see certification at multiple touchpoints. Most expect to see it in the hotel itself (60% on average), but nearly half expect to see it earlier, such as on OTA listings and hotel websites where consideration is shaped. A third or more want the ability to filter for certified properties when researching and booking.

The implication for operators and platforms is operational: the badge belongs at booking, the detail belongs in-room. This is also the bridge to Chapter 3, which examines what the industry loses when visible proof is absent from those touchpoints.

Chapter 3:

What the industry loses when proof stays invisible

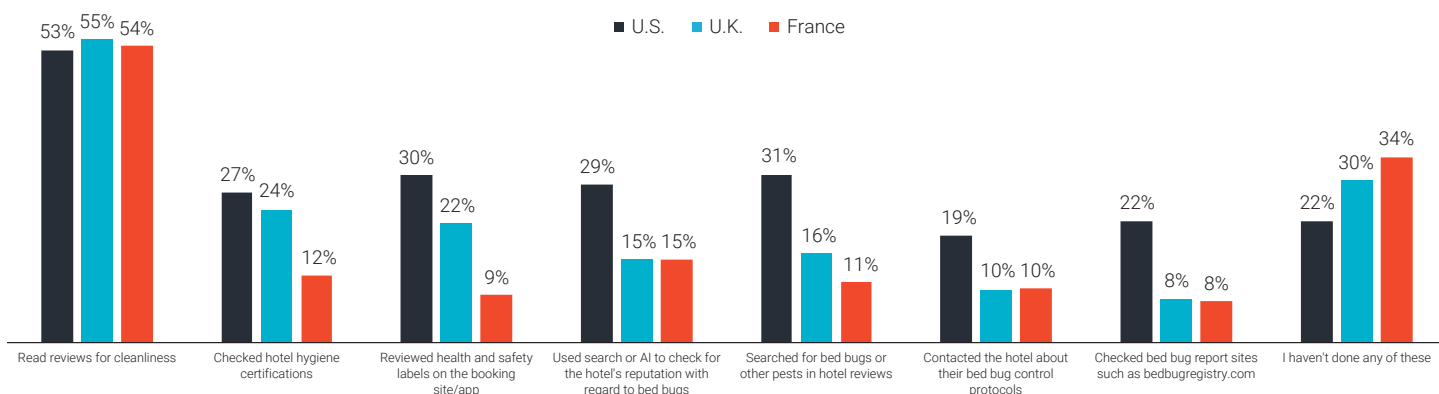
Guests are already scanning—and increasingly without asking

The silence gap documented in Chapter 1 does not mean travelers are passive. Across all three markets, around 7 in 10 travelers take at least one pre-booking action related to a hotel's hygiene and bed bug reputation, and 15-39% have actively asked hotels whether they hold any sort of bed bug safety certification. More than half of respondents read reviews for cleanliness before booking—53% in the U.S., 55% in the U.K. and 54% in France—and roughly a quarter to a third also check hotel hygiene certifications or review health and safety labels on the booking site/app. Travelers are actively assessing the environmental and hygiene quality of a property before they commit to it.

Within that broader scanning behavior, bed bug-specific research is a meaningful subset, particularly in the U.S. There, 31% search reviews directly for bed bugs or other pests, 29% use search or AI tools to check a hotel's bed bug reputation, 22% check bed bug report sites such as bedbugregistry.com and 19% contact the hotel about its bed bug control protocols. U.K. and French shares on these behaviors are smaller—generally 8% to 16%—but the same set of pre-booking actions appears in both markets.

And 15-39% of respondents say they have actively asked a hotel or accommodation provider whether it had any sort of bed bug safety certification, because they knew such certifications existed in the market. This is the visible tip of a much larger pre-booking inspection behavior, most of which happens without any direct contact with the property.

Figure 8: Actions taken when researching and selecting a hotel



Question: Have you done any of the following when researching and selecting a hotel for a trip in the past 12 months? Select all that apply.

Base: U.S. (N=364); U.K. (N=366); France (N=352)

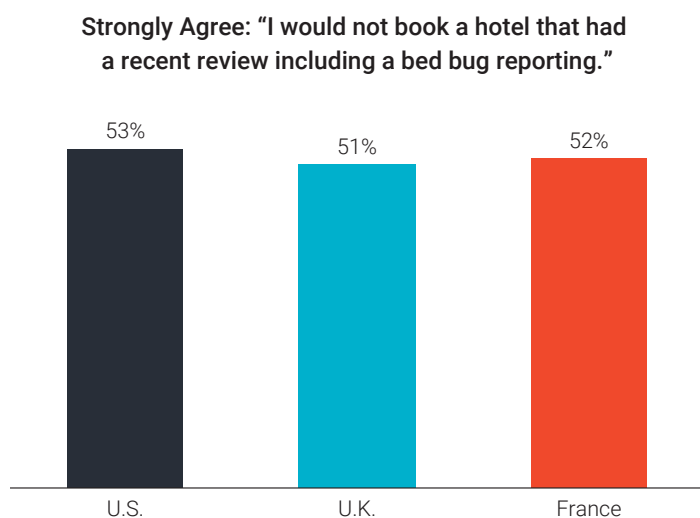
Source: Traveler's Concerns With Bed Bugs and Valpas Solution Impact

The expensive travelers: who experiences bed bug issues, and how often

Roughly 30% of U.S. travelers and 15% of U.K. and French travelers report having encountered bed bugs in a hotel. For those travelers, the experience is not once-in-a-lifetime: the average number of reported occurrences is 3.1 in the U.S., 2.5 in France and 2.1 in the U.K.

These are the travelers most likely to scan reviews, switch brands, demand compensation and walk away permanently. The emotional register varies by market: U.K. respondents react most strongly with disgust; French respondents pair disgust with anger; U.S. respondents are more likely to seek financial redress—but the behavioral consequence is consistent. One incident converts a paying loyalist into a costly customer.

Figure 9: Effect of bed bug mention in review on booking



Question: Please indicate how much you agree or disagree with each statement below

Base: U.S. (N=364); U.K. (N=366); France (N=352)

Source: Traveler's Concerns With Bed Bugs and Valpas Solution Impact

The loss mirror: when proof is absent, loyalty erodes

The positive findings in Chapter 2 have a mirror image. When visible certification is absent, the same booking dynamics work against the property. Across the three markets, 67% to 73% of respondents say they would prefer a hotel with visible bed bug safety certification over a brand they are typically loyal to but uncertified, when all other attributes are equal. Between 35% and 44% say a single bed bug incident would make them permanently avoid the brand. Half say they would not book a hotel with a recent bed bug review.

These are not threats hotels are imagining. They are stated booking behaviors from travelers in three countries, anchored in concerns the same travelers already act on every time they choose a property.

AI is accelerating the discoverability shift

A directional finding from the survey: roughly 30% of U.S. travelers and 15% of U.K. and French travelers report using AI tools or search platforms to investigate a hotel's bed bug reputation before booking. The behavior is still emerging, it is not yet the dominant channel, but the directional shift is consistent with broader changes in pre-booking research.

As AI-assisted travel planning grows, the information asymmetry that has protected operational reputation is likely to shrink further.

The cost of invisibility

If the three-market opportunity from universal adoption is approximately €9.5 billion, the cost of the current state—what the industry already absorbs from incidents, compensation and review-driven demand loss—is in the range of approximately €2 billion to €5 billion across the three markets each year, according to a Valpas analysis.

The figure has two components. The first is the direct cost of each incident: hotel-side remediation (treatment, replacement of soft goods, lost business while rooms are out of service) and traveler-side compensation. Drawing on industry cost benchmarks and survey-measured

compensation expectations, this component sits in the range of approximately €1 billion to €2.25 billion per year, depending on the assumed incidence rate.

The second is the multi-year demand suppression that follows a publicly visible bed bug review. The mechanism is anchored to Cornell School of Hotel Administration research showing a measurable RevPAR impact from changes in online reputation scores. Applied to the estimated share of incidents producing a public review, this component sits in the range of approximately €1.1 billion to €3.4 billion per year.

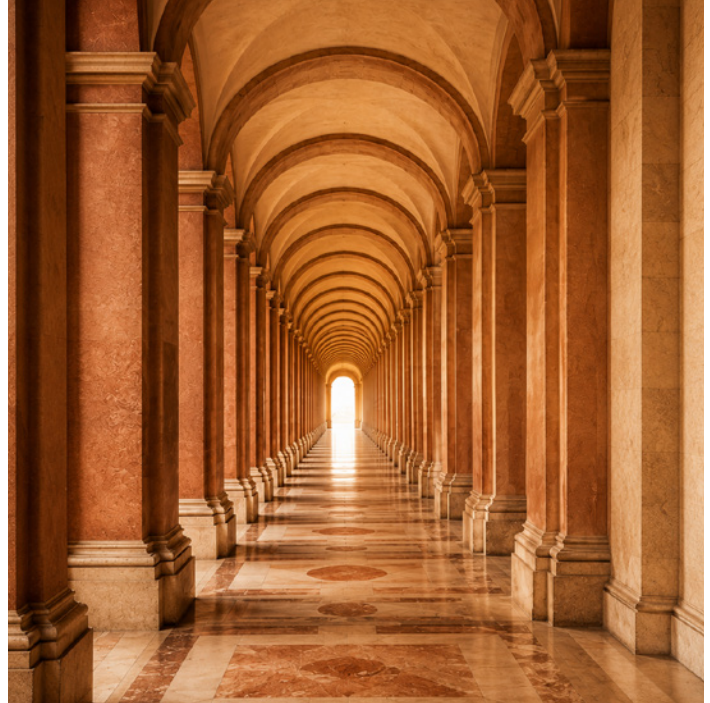
Valpas' full methodology, including the key assumptions and ranges tested for each, is summarized in the Appendix. Two notes belong with the figure. First, it excludes litigation costs, which industry sources put substantially higher per incident. Second, it excludes the anxiety-tax effects on the silent majority of travelers—those who scan, switch and walk away without ever filing a complaint or writing a review. Both effects raise the real cost further. The figure is a conservative floor, not a ceiling.

A unique competitive attribute for hotels, OTAs and TMCs

Visible bed bug safety proof has an unusual property as a competitive attribute: it is additive rather than substitutive. It does not cannibalize the booking attributes (price, location, star rating, reviews) that travelers and platforms already use. A property that displays it does not lose on any of those dimensions; it gains on one the others do not capture.

The platform implication is the same. Thirty-five percent of U.S. travelers say they would switch booking platforms for easier access to certified hotels, with smaller but still meaningful shares in the U.K. and France. For OTAs and TMCs, a visible trust signal at the search-and-filter stage is the same kind of competitive lever that filterable amenities (free Wi-Fi, breakfast included, free cancellation) have been in previous cycles.

The competitive stake is straightforward. The hotels, OTAs and TMCs that make this proof visible first stand to absorb the demand the rest of the industry is invisibly losing.



“HotelPORT sits where the data behind hotel discovery, decision and arrival actually gets governed—we work with the systems that decide whether a traveler can find the truth about a property, book it with confidence and get there without friction. What this study confirms is that bed bug safety has moved firmly into the ‘decision’ layer of that journey. Travelers want to know before they book and, increasingly, so do the AI systems and procurement platforms making recommendations on their behalf. Independent, real-time, room-level verification of bed bug safety isn’t an operational detail anymore; it’s data that belongs alongside cleanliness, location and price in the systems doing the matching. We’ve seen this curve before with sustainability and accessibility. Bed bug safety is on the same path, and the operators and platforms surfacing this proof early are the ones who’ll capture the trust travelers are already looking to give.”

Fred Bean

founder and CEO, HotelPORT

Conclusion:

The signal the industry has been missing

For many travelers, the decision to book a hotel now hinges on a concern the industry has long treated as operational rather than commercial.

Travelers in the U.S., U.K. and France treat pest safety as their biggest concern when choosing a hotel. They scan, inspect and switch around it. They would pay more for visible, continuous bed bug safety proof and walk away—sometimes permanently—when it is absent. They classify a bed bug-safe room as a necessity, not an amenity. And they do almost all of this without ever raising the topic with the hotels they are evaluating.

The industry has been responding to a different signal than the one travelers are sending. The result is the gap quantified in the preceding chapter: an opportunity of approximately €9.5 billion across the three surveyed markets, against a current-state cost in the range of €2 billion to €5 billion that is already being absorbed silently, according to a Valpas analysis.

The survey does not predict how the industry will respond, but the findings establish three things hoteliers, OTAs and corporate travel buyers can act on. First, the demand exists, is mainstream and is already shaping booking behavior. It does not need to be created. Second, visible, continuous, independent proof shifts that behavior in measurable, monetizable ways across rate, loyalty and brand trial. Third, the silence gap means most operators do not yet know any of this is happening, which makes early movement a competitive advantage rather than a defensive necessity. Visibility does not create the concern; it surfaces anxiety travelers are already managing on their own.

The question is no longer whether visible reassurance matters to the booking decision. The question is which operators, platforms and corporate travel programs will be visible first—and which will continue to absorb the cost of invisibility while others capture the demand.

“Hospitality standards rarely emerge through self-attestation alone. Fire safety, Wi-Fi and sustainability became trusted guest signals because they evolved into independently verifiable standards integrated across operators, booking platforms and corporate travel ecosystems.

“Bed bug safety now appears to be entering a similar transition. Already influencing how travelers search, filter and compare hotels, it is beginning to move into an externally recognized trust category—entering OTA filters and badges, corporate travel RFPs and duty-of-care requirements, while aligning with broader industry frameworks shaped by organizations such as GSTC, WSHA, Travalyst and the European Commission. The question is no longer whether visible reassurance matters. The question is what standards the industry will trust to deliver it.”

Martim Gois

co-founder and CEO, Valpas

Appendix:

Methodology—Industry Opportunity and Industry Tax

Survey

The Phocuswright x Valpas 2026 traveler survey (n=1,082) was conducted across the United States, United Kingdom and France. The sample is balanced by age, gender and trip purpose, and includes both leisure and business travelers. Country sample sizes: U.S. n=[364], U.K. n=[366], France n=[352]. Margins of error and weighting methodology available on request.

Industry Opportunity (three markets), as calculated by Valpas

Calculated as (full-market weighted-average ADR premium) x (annual room revenue), where room revenue = rooms x RevPAR x 365. ADR premium values are U.S. 4.0%, U.K. 3.3% and France 3.0%, derived as full-market weighted averages from survey responses including respondents who would pay no premium (recorded at 0%). Room and RevPAR inputs are drawn from AHLA / STR CoStar 2024 for the U.S., Savills / Amadeus / VisitBritain 2025 for the U.K. and INSEE 2025 / KPMG L'Industrie Hôtelière Française 2024 for France. The figure models only the ADR premium and excludes any occupancy lift from loyalty and brand-trial effects measured in the survey.

Industry Tax (three markets), as calculated by Valpas

Modeled in two tiers, each defensible independently.

Tier 1: direct incident cost = (hotel-side cost + traveler-side cost) per incident x incidents per room-year x rooms. Hotel-side cost of approximately €7,500 per incident is derived from Orkin x Bantam Group 2017 (\$6,383), CPI-adjusted to 2026 USD, and excludes litigation costs (Orkin reports approximately \$17,177 per litigated incident). Traveler-side cost is the full compensation expectation from the Phocuswright x Valpas 2026 survey (U.S. \$3,620 / U.K. £1,458 / France €1,390). Incidence is presented as a range bracketing two reference points: Valpas operational data from its installed base in France (approximately one incident per 33 rooms

per year) and the Orkin benchmark of 7.1 infestations per property per five years, equivalent to approximately one incident per 50–70 rooms per year depending on property size assumptions. The Tier 1 range across the three markets is approximately €1.0 billion to €2.25 billion per year.

Tier 2: review-driven demand suppression is anchored to Cornell School of Hotel Administration research (Anderson 2012) showing approximately 11% ADR impact from a one-point swing on a five-point user-rating scale. Applied to the estimated share of incidents producing a public review (modeled at 3–5%) and an estimated 5–9% RevPAR impact over 12 months, Tier 2 produces a range of approximately €1.1 billion to €3.4 billion per year across the three markets. Survey findings (70% of travelers read cleanliness/bed bug reviews; 50% would avoid a property with a recent bed bug review) are cited as directional confirmation of the Cornell mechanism, not as primary inputs to the calculation.

The combined three-market tax range is approximately €2.1 billion to €5.7 billion per year. The figure excludes litigation, permanent brand-avoidance effects beyond properties with public reviews, and anxiety-tax effects on travelers who scan and switch without filing complaints. All exclusions raise the real cost further.

Notes on global extrapolation

A global figure can be derived by applying the three-market blended premium and parameters to global hotel inventory (approximately 17.5 million rooms; STR aggregate). Because two of the three surveyed markets are demographically and economically similar, and because willingness-to-pay and pest-concern patterns in non-surveyed markets—particularly Asia-Pacific—may differ substantially from the three-market average, Phocuswright does not co-author a global extrapolation in this paper. The three-market figures are the survey-anchored numbers.



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About Valpas

The demand is here. Valpas is the standard built to meet it. For decades, hotels stayed silent about bed bugs because three things were impossible: they couldn't reliably prevent them, couldn't verify a room was safe and had nowhere to show it if they could. Valpas closes all three. Its in-room technology prevents incoming bed bugs before they infest and require treatment, verifies each room continuously in real time rather than through periodic inspection and surfaces that verified status where travelers now decide – OTA listings, AI booking tools and corporate procurement. Independently audited by Bureau Veritas and recognized by GSTC, Valpas certification spans 30,000+ rooms across 60+ destinations, including Marriott, Accor and Michelin Key properties. Headquartered in Helsinki, with offices in London, Paris and Tokyo.

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