



VisitScotland Weddings Research Executive Summary

VisitScotland commissioned Progressive to carry out research into the tourist wedding market in Scotland. The following paragraphs summarise the key points from this research conducted in September and October 2006.

Objectives and Methodology

Recent statistics released by the General Register Office for Scotland show that in 2005, in 25% of all marriages in Scotland, neither party was resident in Scotland. In addition, it is known that around half of these "tourist weddings" took place in Gretna. Research was commissioned in order to investigate and understand the tourist wedding market in detail and to estimate the economic benefit to Scotland.

Qualitative and quantitative techniques were used in the 3-stage methodology:

- Stage 1 – online survey posted on <http://www.confetti.co.uk> amongst 546 brides and grooms
- Stage 2 – quantitative telephone interviews with a sample of 100 tourist brides registered with the Scottish Wedding Directory
- Stage 3 – qualitative in-depth interviews: 6 with wedding planners and venues, 1 with a weddings expert, 5 with brides and 3 with brides-to-be.

Findings from all three stages were analysed together to present a holistic picture of the tourist wedding market in Scotland.

The Wedding Planning Process

The planning process for any wedding tends to take place over a fairly long period of time with couples engaged for an average of around 2 years before marrying. The majority of weddings are still held on Saturdays, although Friday and Sunday are becoming more popular, particularly in the summer months. Venue is the first decision made in the majority of cases and all other decisions tend to be taken as a result of this – indeed the venue decision can often determine the date of the wedding based on availability of the desired location. Bookings surge around traditional "romantic" seasons such as Christmas, New Year and Valentine's Day, suggesting that many engagements take place during these festive periods.

This means that any promotion of Scotland as a wedding destination should be very early on in the 2 year decision process, and in order to optimise marketing spend, ideally focussed on the key engagement "seasons" – Christmas, New Year and Valentine's Day.

Despite evidence of increased involvement of grooms in the planning process over recent years, the bride remains the key decision maker and her mother tends to be a key influencer. Few employ wedding planners – although the instance of planner involvement in tourist weddings in Scotland is higher than average due to their involvement in arranging weddings where both parties live abroad.

This highlights the requirement for the marketing of Scotland to be primarily directed at brides themselves, although grooms and mothers of the bride could be considered as secondary audiences.

The average UK wedding costs £9,908 (based on total spend estimated by brides in the Confetti survey) and comprises 102 guests, 39 of whom require overnight accommodation. The spend figure is perhaps lower than expected, but can be explained by the fact that 58% of the online sample expected to spend less than £10,000 on their wedding.

Tourist Weddings

A large proportion of couples (75%) do consider marrying in a different location than where they currently reside, however a much lower proportion (17%) actually go through with this. In addition, these figures are based on a “purist” definition of tourist weddings and therefore include all those who marry in a different area than they currently live. As the qualitative research highlighted the majority of brides choose to marry where their parents live or where they grew up – “at home”.

A total of 8% of non Scottish residents in the online sample said they had considered Scotland as a wedding destination and 1% actually decided to hold their wedding in Scotland. It is interesting to note however, that of this 1% (7 respondents) only 1 respondent did not have Scottish roots. This suggests that the majority of UK based couples who decide to marry in Scotland have some kind of Scottish connection either through birth, growing up, going to University / college in Scotland. Although we believe this group to account for a large proportion of the Scottish tourist wedding market, we cannot accurately size it as another important segment of the market – international couples – were not included in our research.

The key point to note however is that the conversion rate of 8% considering Scotland to 1% actually choosing Scotland could be improved, suggesting that there is potential for increasing the number of tourist weddings in Scotland.

Scotland is considered to have many unique qualities as a wedding destination. The scenery, ability to marry in interesting venues (such as castles) and renowned Scottish hospitality as well as practical aspects such as accessibility and the straightforward legal requirements combine to act as pull factors for couples considering a tourist wedding. In addition, Gretna is well known as a wedding destination for those who want to get away from it all – contributing to an image of escape (often from family politics).

The Scottish tourist wedding market can be segmented into 4 core groups:

1. **Those with Scottish roots** – bride or groom born or grew up in Scotland, family often still living here and tend to get involved in the wedding planning process.
2. **Those who want to get away from it all** – often second / repeat marriages or those where family politics are complicated, also includes those who are just on holiday in Scotland and decide to get married on the way. Accessibility of Scotland is a key motivator for this group.
3. **Those with another connection to Scotland** – bride or groom went to University in Scotland or spent childhood holidays here. Also includes those with Scottish ancestry. This and the next group are largely comprised of international couples.
4. **Those taken with romance and celebrity of Scotland** – castles and lochs, scenery and aura of romance are key for this group. Many will have no direct connections with Scotland but are attracted by the uniqueness of a Scottish wedding and some by recent high profile celebrity weddings.

Each of these segments is attracted to Scotland as a wedding destination for different reasons, and each segment has different requirements for support.

1. For the first group Scotland is largely irrelevant as their main driver is getting married “at home”. They require little support in arranging their wedding or connecting with suppliers as most have family / friends in the location to help with the arrangements. The main area where support could be useful for this group is in providing information for guests.
2. The “get away from it all” group are attracted to Scotland for primarily practical but also emotional reasons. Although this group could probably use support in making wedding arrangements they are a hard group to reach as they often make a last minute decision to get married in Scotland.
3. The remaining two segments can be grouped in terms of their motivations to come to Scotland to get married, but also their support requirements. Scotland itself is very important to these groups, given that the perception of the romance of Scotland is a key driver. This audience requires the most support in arranging their wedding – help with suppliers, provision of information to guests, as well as general reinforcement of Scotland as an ideal wedding destination.

Tourist weddings in Scotland have a slightly different profile to other weddings in the UK. A generally higher total spend is evident - £14,146¹ (vs £9,908 in other UK weddings), and although the average number of guests at a tourist wedding is smaller at 62 (vs 102 in other UK weddings), a higher proportion of these guests require overnight accommodation (46 vs 39). In addition, couples tend to stay in Scotland for 6 nights on average around their wedding date, and evidence from planners and venues suggests that up to 3 weekend visits will be made by the couples to make arrangements and finalise plans in advance of the wedding day.

Calculations based on data provided by brides and GRO statistics suggest that the Scottish tourist wedding market could be worth just under £80million per annum. It should be noted that this figure is a conservative estimate and only takes into account spend on the wedding itself (estimated by the brides) and guest spend for one night's accommodation.

¹ N.B This figure is based on a sample of Scottish Wedding Directory brides who were on average, slightly older and more affluent than the Confetti sample.