Tying the knot in Scotland

Examining Scotland as a destination wedding venue

Insight Department | December 2019
Welcome

Weddings and the revenue they bring to businesses across Scotland can be a critical contributor to the success of a destination, particularly for those businesses primarily operating in the tourism sector in rural destinations.

With the average cost of a wedding in the UK totalling almost £18,000\(^1\), across an average of thirteen suppliers, there are significant opportunities for the tourism sector to capitalise on.

Destination weddings have risen in popularity in recent years, with couples looking to get away from it all or experience somewhere new as part of their wedding celebrations. The global Destination Wedding market is estimated to be worth US$16 billion annually\(^2\), offering further opportunities for businesses in Scotland able to benefit from this market.

This paper seeks to examine Scotland’s place as a destination for weddings and the trends at play in the wedding sector, which Scottish businesses can utilise.

Methodology

Stage 1:

Desk based research drawing on sources from National Records of Scotland, VisitScotland and visitor attraction data as well as industry resources such as the UK Wedding Report 2018.

Stage 2:

Business trends and opportunities gathered via horizon scanning and telephone interviews with businesses operating in the destination wedding sector in Scotland.
Marriages registered in Scotland

Scotland is a popular location for weddings for both those resident here and from further afield. Over half a million couples have chosen to get married in Scotland since 2001, with an average of 29 thousand ceremonies carried out each year.

In recent years, Scotland has experienced a slight decline in the total volume of legally recognised marriages, falling to 27,525 in 2018. This follows the trend seen in the rest of the UK, the USA and Northern Europe, often attributed to changing attitudes of younger generations and a move away from the concept of marriage.

Over 130,000 marriages of non-Scotland based couples have been registered in Scotland since 2001, with domestic weddings (rUK residents) peaking in 2004. In 2018, almost a thousand overseas couples chose to marry in Scotland, a decline of 4% on 2017 but an increase on 2016. These figures are over and above the number of couples choosing to conduct a symbolic, or non-legally binding ceremony in Scotland, estimated to be between a third and half of all international destination weddings conducted annually.

Anecdotal evidence coupled with these figures, highlight Scotland as a strong proposition for destination weddings, particularly within the domestic market.

### Proportion of marriages registered in Scotland in 2018 by residence type

<table>
<thead>
<tr>
<th>Area of residence</th>
<th>2017</th>
<th>2018</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scottish resident - Scottish resident</td>
<td>21,657</td>
<td>21,002</td>
<td>-3%</td>
</tr>
<tr>
<td>rUK resident - rUK resident</td>
<td>5,056</td>
<td>4,844</td>
<td>-4%</td>
</tr>
<tr>
<td>International</td>
<td>1,008</td>
<td>967</td>
<td>-4%</td>
</tr>
<tr>
<td>Scottish resident - rUK resident</td>
<td>349</td>
<td>328</td>
<td>-6%</td>
</tr>
<tr>
<td>Scottish resident - one non UK</td>
<td>275</td>
<td>288</td>
<td>5%</td>
</tr>
<tr>
<td>rUK resident - one non-UK resident</td>
<td>95</td>
<td>96</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: National Records of Scotland Marriages and Civil Partnership 2018
Scottish Wedding Market Profile

Where in Scotland you’re tying the knot

16% ABERDEEN + ABERDEENSHIRE
20% FIFE, ANGUS, DUNDEE+ PERTHSHIRE
23% EDINBURGH, LOTHIANS + BORDERS
29% GREATER GLASGOW + CLYDE VALLEY, AYRSHIRE + ARRAN

The DC Thomson Media Scottish Wedding Census 2018 asked over 500 respondents who got married in 2018 on all aspects of their wedding for their annual Scottish Wedding census.

The online survey ran from 27th September 2018 to 5th February 2019.

Full details may be found at https://www.scottishweddingdirectory.co.uk/wedding-inspiration/cost-average-scottish-wedding-scottish-wedding-census-2018-results/

Autumn has overtaken summer in 2018 as the most popular season in which to get hitched with 37% of couples marrying between September and November.

Only 1% tie the knot in January.

Scottish wedding industry was worth £963 million in 2018

The Most Popular Type of Scottish Wedding Venue

Ceremony

Reception
INSIGHT DEPARTMENT: Wedding Tourism

Domestic Wedding Market

Around five thousand weddings, involving residents from the rest of the UK are conducted annually in Scotland, accounting for almost a fifth of all weddings in Scotland.

Over and above spend associated with the wedding itself, estimated to be £19,791\(^1\) per wedding, that would otherwise not enter the Scottish economy, the expenditure associated with guests’ attendance at special events within Scotland was calculated to be £233m in 2017.

Volume and value
Visitors who “Attended a special event of a personal nature (e.g. wedding, graduation, christening)"

<table>
<thead>
<tr>
<th></th>
<th>Trips (000s)</th>
<th>Nights (000s)</th>
<th>Spend (£m)</th>
<th>Length of Stay (nights)</th>
<th>Spend/Trip (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Overnight</td>
<td>233</td>
<td>781</td>
<td>£60</td>
<td>3.4</td>
<td>258</td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic Day</td>
<td>3,653</td>
<td>N/A</td>
<td>£173</td>
<td>N/A</td>
<td>47</td>
</tr>
<tr>
<td>Visitors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: GBTS 2017, GBDVS 2017

Characteristics of a UK wedding:

- 78–80 guests
- 44% summer weddings
- £19,719 average cost of a Scottish wedding
- 44% non-Saturday weddings
- 1/5 couples attend national wedding fairs
- 13 suppliers involved in the big day
- 60% choose ceremony & reception in one location
- 3/4 Couples read online reviews before booking suppliers

Source: The UK Wedding Report 2018
International Weddings

One in every twenty legally recognised weddings in Scotland involve a resident from outside of the UK, with around 1000 non-UK resident couples choosing Scotland to tie the knot in 2018.

The countries of birth of both parties are recorded and included in the National Records of Scotland. In 2017, Scotland was a popular choice for engaged couples from the EU and Commonwealth countries, looking to have a destination wedding.

**Country of birth of parties wed in Scotland 2017**

<table>
<thead>
<tr>
<th>Party 1</th>
<th>Irish Republic</th>
<th>European Union (exc Irish Rep)</th>
<th>Commonwealth</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Party 2</td>
<td>Irish Republic</td>
<td>27</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>European Union (exc Irish Rep)</td>
<td>5</td>
<td>447</td>
<td>37</td>
</tr>
<tr>
<td></td>
<td>Commonwealth</td>
<td>6</td>
<td>111</td>
<td>263</td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td>7</td>
<td>66</td>
<td>17</td>
</tr>
</tbody>
</table>

Source: National Records of Scotland Marriages and Civil Partnership 2017

Please note, the above table records country of birth of party 1 and 2 of a wedding, not area of residence as shown in previous tables. In some cases, an individuals’ country of birth will be different to their current region of residence. These figures should be treated as indicative of potential markets for destination weddings, not as actual volumes of those travelling from a specific international destination.

The businesses we spoke to highlighted **North America and Australia** as the key long haul markets as well as the **EU**, which account for the majority of registered weddings in the table above as key destination wedding markets.

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International Weddings

With over 3.5 million visitors, 2018 was a record year for international inbound tourism to Scotland. This represented a 10% increase in volume, but a 3% decline in total spend from our overseas visitors. The USA held the top spot for inbound visitors to Scotland, in terms of both volume and value, despite falling by 13% in terms of actual volume of visitors. The strong growth in visitor numbers was driven by an increase in European visitors, a market which also make up the majority of destination wedding participants.

<table>
<thead>
<tr>
<th>Market</th>
<th>Visits (000s)</th>
<th>Nights (000s)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>492</td>
<td>3,907</td>
<td>438</td>
</tr>
<tr>
<td>Germany</td>
<td>451</td>
<td>2,818</td>
<td>246</td>
</tr>
<tr>
<td>France</td>
<td>318</td>
<td>1,985</td>
<td>209</td>
</tr>
<tr>
<td>Italy</td>
<td>268</td>
<td>1,220</td>
<td>110</td>
</tr>
<tr>
<td>Spain</td>
<td>205</td>
<td>1,192</td>
<td>79</td>
</tr>
<tr>
<td>Australia</td>
<td>172</td>
<td>1,801</td>
<td>153</td>
</tr>
<tr>
<td>Netherlands</td>
<td>172</td>
<td>945</td>
<td>86</td>
</tr>
<tr>
<td>Canada</td>
<td>131</td>
<td>1,269</td>
<td>117</td>
</tr>
<tr>
<td>Sweden</td>
<td>121</td>
<td>605</td>
<td>74</td>
</tr>
<tr>
<td>Norway</td>
<td>106</td>
<td>338</td>
<td>40</td>
</tr>
</tbody>
</table>

Source: IPS 2018

A recent study conducted by Allianz Global Assistance examined American residents’ sentiment towards destination weddings.

26.7% of Americans have attended a destination wedding

48.8% of Americans would consider having a destination wedding

As Scotland’s top international market, and rising popularity of destination weddings in the US, this is an interesting proposition for destination weddings in Scotland. Over a quarter of long haul visitors to Scotland are motivated by their ancestral roots, which was also found to influence couples’ decision making when it comes to wedding destination for a small proportion of couples (4.1%).

“Our about 60% of our couples are American or Canadian”

“We have German, Dutch, French couples getting married here – not in high volumes but what has been rising are couples from Australia”
Unlike the rest of the UK, in Scotland couples are able to get married in any location and at any time of the day, offering up businesses across Scotland the opportunity to play a part in making a couple’s wedding dreams a reality.

The top considerations for UK couples when selecting their wedding venue are:

![Icons for Location, Beauty, Friendly Staff, Price, Grounds & Views]

Source: The UK Wedding Report 2018

Factors related to location and surroundings are key decision drivers, both for those holidaying in Scotland and when selecting a wedding venue for a domestic or destination wedding. Visitors’ motivators to visit Scotland are investigated through the VisitScotland Visitor Survey and shown in the table below.

### Regional spread of wedding ceremonies against Scenery as a motivator to visit

<table>
<thead>
<tr>
<th>Region</th>
<th>Marriages 2018</th>
<th>Scenery and Landscape as a motivator to visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dumfries and Galloway</td>
<td>4,054</td>
<td>63%</td>
</tr>
<tr>
<td>City of Edinburgh</td>
<td>2,804</td>
<td>61%</td>
</tr>
<tr>
<td>Glasgow City</td>
<td>2,469</td>
<td>71%</td>
</tr>
<tr>
<td>Highland</td>
<td>1,510</td>
<td>87%</td>
</tr>
<tr>
<td>Fife</td>
<td>1,475</td>
<td>59%</td>
</tr>
<tr>
<td>Aberdeenshire</td>
<td>1,249</td>
<td>50%</td>
</tr>
<tr>
<td>Argyll and Bute</td>
<td>1,078</td>
<td>84%</td>
</tr>
<tr>
<td>Perth and Kinross</td>
<td>1,059</td>
<td>74%</td>
</tr>
<tr>
<td>South Lanarkshire</td>
<td>1,045</td>
<td>68%</td>
</tr>
<tr>
<td>Scotland</td>
<td>27,525</td>
<td>50%</td>
</tr>
</tbody>
</table>

Source: VisitScotland Visitor Survey 2016, National Records of Scotland Marriages and Civil Partnership 2018
Gretna Weddings

In 2017, 15% of all weddings in Scotland took place in Dumfries and Galloway, with the majority (81%) conducted in the historic wedding venue of Gretna Green and surrounding area.

Since the introduction of Lord Hardwicke’s Marriage Act in 1754, Gretna has been frequented by young English couples looking to wed, and this tradition continues to the present day. The romantic history of the Gretna Green Blacksmith Shop and related attractions, have led it to become a popular destination for visitors and soon-to-be-wed couples alike.

**Volume of marriage ceremonies conducted in Gretna Green**

[Graph showing the number of marriage ceremonies conducted in Gretna Green from 1974 to 2018. Key points include: 1985 - First religious ceremony conducted over the anvil, 2002 - Introduction of Civil Ceremonies, 2005 - Introduction of Civil Partnerships, 2014 - Introduction of same-sex weddings.]

**Source:** National Records of Scotland Marriages and Civil Partnership 2018

**Area of residence of parties in weddings conducted in Gretna Green 2018**

- Neither party resident in Scotland: 84%
- One or both parties resident in Scotland: 16%

Unlike the national picture, the vast majority of weddings conducted at Gretna Green are between two parties who are resident outside of Scotland.

This is driven primarily by the domestic (rUK) market, accounting for 4 in 5 weddings taking place at Gretna.

Source: National Records of Scotland Marriages and Civil Partnership 2018
INSIGHT DEPARTMENT: Wedding Tourism

Gretna Weddings

The history of Gretna as a wedding destination has contributed to the success of the area as a visitor attraction and destination. In 2018 the Old Blacksmith’s Shop Centre welcomed a total of 770,602 visitors – over 200 times more visitors than engaged to be wed couples, and achieving top spot for total visitor numbers in Dumfries & Galloway.

**Total annual visitors to Old Blacksmith’s Shop Centre Gretna Green**

![Graph showing annual visitors from 2008 to 2018](image)

*Source: Moffat Centre, Visitor Attraction Monitor 2018*

“We have many guests and couples arriving a couple of days before the weddings asking us where to go and what to do and so we are telling them about our own attractions but of course others throughout the area.”

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**Top 5 Visitor Attractions in Dumfries and Galloway in 2018**

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Total Visitors 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gretna Green Famous Blacksmiths Shop</td>
<td>770,602</td>
</tr>
<tr>
<td>Galloway Forest Park</td>
<td>368,366</td>
</tr>
<tr>
<td>Threave Garden</td>
<td>96,357</td>
</tr>
<tr>
<td>Mabie Forest</td>
<td>69,496</td>
</tr>
<tr>
<td>Dalbeattie Forest</td>
<td>49,823</td>
</tr>
</tbody>
</table>

*Source: Moffat Centre, Visitor Attraction Monitor 2018*
What is the Scottish Tourism Industry saying?

**Benefits**

- **Off peak bookings** including out of season and midweek
- **Advanced booking and forward planning**
- **Opportunity to work with luxury market** – higher spend couples
- **High spend per guest and additional income**
- **Length of stay and additional activities**
- **Opportunities for product and partnership development**
- **Additional income stream to support business operations and investment**
- **Potential for repeat custom**
- **Economic benefits to wider community**

“It’s a great way to showcase the town the venue is in too. The whole purpose of improving the cultural infrastructure is about developing the local economy. Weddings really serve us well in this way.”

“The wedding industry helps small service-based businesses in rural communities survive. A small local business, could be the only bakery for 40 miles, if we have clients that want wedding cakes that could be quite impactful if we are planning 10, 12, 15 weddings in the area.”

“People need a certain length of time to plan a wedding so for our future bookings we have a pretty clear idea of what to expect during that year.”

“For the love of Scotland - to put that money back in to looking after our properties - that’s why we do it!”

“The number of guests they bring to the area is massive as well. That brings benefits to the local community as it brings more employment to the area.”

**Barriers**

- **Location and ease of connectivity** for rural locations
- **Legalities** involved in process and offering support to potential customers
- **Access to technology** allowing effective communication with couples (WiFi, Video conferencing etc.)
- **Routes to market, marketing channels and investment** required to attract destination weddings
- **Operational challenges such as time difference and language barrier**

“Trying to get those enquiries in from overseas that’s probably the biggest obstacle at this stage, finding the market and reaching out to them”

“One of the challenges is that sometimes couple don’t or can’t come and look at the castle beforehand.”

“It is labour intensive. It’s unique at our venue as we have weddings of very varying sizes – just twos, threes, tens, twenties and they still need the same level of care and attention on their wedding day.”
Trends and Opportunities for Wedding Tourism in Scotland

Through conversation with businesses operating in the destination wedding sector in Scotland, and investigation of societal change we have identified four key strengths for Scotland as a destination for weddings.

- **Responsibrides**
- **Retromony To Absent Friends**
- **Bridegroom with a View**
- **For Richer, For Poorer**

The consistent thread connecting these trends is a familiar one – personalisation. Today (and tomorrow’s) consumer is looking for products and services that can flex and adapt to their wants and needs, and this attitude is no different when considering weddings, and destination weddings.

From food to flowers, décor to destination, couples want their wedding day to reflect their personalities, involve loved ones and adapt to their budget.

“"A lot more 'decorate the hall yourself weddings' allowing couples to express their personality"

“We are speaking to other venues and wedding numbers are getting smaller but that is giving the couple the ability to bespoke the wedding to how they want it.”
Trends and Opportunities for Wedding Tourism in Scotland

Retromony - To Absent Friends

Heritage and ancestry have long been important drivers of international tourism in Scotland, particularly in long haul markets such as North America and Australia. Many couples look to the past when planning elements of a wedding and this presents a unique selling point for Scotland within markets with strong familial or ancestral links to our shores.

A recent study of American couples indicated 4.1% would select their wedding destination “as a nod to their heritage and family roots.” and 3% of Australian couples intend to have an overseas destination wedding.

With elopement-style weddings intrinsically linked with Scotland and destination weddings in general, many couples are looking to include a sense of family in their big day, without having them present. Incorporating elements of ancestry within the ceremony, such as hand-fasting or drinking from the Quaich, and the celebration itself through use of tartan decorations and traditional dress have been commented on by businesses.

“We get interesting requests from Clan Fraser and Clan Brodie...sometimes its even just their name, it’s not even their clan or ancestry.”

“A lot of films have been shot here recently so people get to see it on their screens and fall in love with the mystery and romance of it. We had a lot of collateral around heritage anyway, so it is another way to utilise that.”

“Amercians and Canadians like very traditional Scottish themes, thistles, tartan, whisky, ceilidhs. They want to feel that they are part of Scotland.”

“We have a lot of groups that have no Scottish heritage and still choose to go for the full kilt experience.”

Couples looking to make heritage a part of their wedding celebrations are also taking inspiration from film and TV, such as Outlander, showcasing Scotland’s rich history and landscape to new audiences. Offering themed wedding packages, using existing and new collateral, could stimulate interest from couples interested in Scotland’s history and heritage and considering a destination wedding.
Trends and Opportunities for Wedding Tourism in Scotland

**Responsibrides**

In our 2019 Trends paper, VisitScotland identified the growing trend of “Green Getaways” and sustainable travel.

With issues such as food waste and carbon footprint often front of mind for everyday consumers, it’s no wonder this is translating to the wedding market too. Friends of the Earth Scotland highlight the average wedding emits around 14.5 tonnes of CO₂, however with Scotland being seen internationally as a country which “behaves responsibly to protect the environment” our eco-credentials will be of increasing importance to visitors and engaged couples alike.

Both domestic and international couples are increasingly looking for opportunities to conduct responsible ceremonies and receptions, from everything from the venue choice itself to food and drink options.

“We have had some people enquire with us purely and simply because of our sustainability programme so that is something people are looking for.”

Flowers and plants play an integral part in the Scottish landscape loved by our visitors and businesses highlighted this as an area couples planning their wedding are incorporating in their big day - showcasing the outdoors through using rocks, moss and seasonal flowers in table arrangements and decorative displays.

Consumers’ responsible attitude towards weddings covers more than environmentally friendly practices mentioned already. Couples are also looking for ways to give back to the destination they select for their wedding, looking for things such as charitable status and asking guests to donate rather than give gifts.

Although travel is an integral part of a destination wedding, smaller guest numbers and tying in a honeymoon can leave a destination wedding as the environmentally friendly option.

“One couple even brought in their own moss, live moss, and used it as a centrepiece.”
Trends and Opportunities for Wedding Tourism in Scotland

Scotland’s scenery and landscape is a key motivator for visitors booking and staying here and is very important when selecting a wedding venue too. Many businesses commented on the increasing popularity of outdoor wedding ceremonies, a unique selling point given Scotland’s flexible laws on where couples can get married.

“One change we have seen is people looking for outdoor weddings. One of our sites, the Hermitage in Perthshire, is really a woodland walk with a beautiful waterfall, and the interest around that venue has rocketed! Couples want to go out into the wilderness and get married.”

Couples are making decisions on wedding venue based on a combination of factors, but ensuring you showcase not only your property but the grounds and surrounding landscapes they can access as part of their wedding ceremony is key to capturing business, particularly when looking for destination wedding bookings.

“People are often looking to get married outdoors, by a loch side, up a hill, making the most of the splendid Scottish landscape.”

“Everyone, whether they are international, local, everyone is looking for an outdoor ceremony. It’s the location, it is so beautiful, so people want to get married outside and have this amazing view.

“We introduced an outdoor venue four years ago and its very popular.”
Trends and Opportunities for Wedding Tourism in Scotland

For Richer, For Poorer

It has long been recognised that post millennial generations’ attitude to expenditure are different to that of their parents and grandparents, manifesting in a prioritisation of experiences over possession. This attitude also applies to the costs associated with a traditional wedding ceremony and a resulting rise in the number of both lower budget elopements and lavish destination weddings worldwide.

Many couples are interested in a high expense, luxury wedding experience, with links to traditional group travel. All elements of the wedding period are managed by an event coordinator and couples will be looking for recommendations for all parts of the event. Food, beverages and activities offer opportunities for networks of businesses in Scotland to provide a high quality experience for these groups and encourage additional spend, and an ongoing relationship with Scotland as a destination.

“They want activities - so that can be a BBQ, Highland Games, falconry, playing golf. They do make a real occasion of it and we can support those activities in-house or bring suppliers in to do that. A lot of guests will go on to visit other places in Scotland after the wedding.”

For some, destination weddings are viewed as a budget friendly alternative to the traditional wedding celebrations, allowing the happy couple to quench a thirst for travel, limit wedding expenditure and ask for guests to contribute more to attend.

A Bank of America study of US Gen-Zers highlighted 80% would prioritise saving for a deposit over planning their dream wedding. This attitude towards expense, combined with a drive for experiential travel is likely to result in demand for budget-friendly wedding packages and destination weddings or elopements.

With the prevalence of crowdfunding and donation services on the rise, asking for “wedding help” instead of gifts is likely to become more popular, with many wedding invitations already including “Honeymoon Gift Lists”. Businesses should consider how they can support couples with their modern day “Penny Weddings”, offering to manage payment of suppliers in instalments or recommending suppliers with payment options.

“It can be to do with budget, but smaller weddings can also be down to how busy people’s lives have become – they are easier to organise for couples and they are more concerned with celebrating with people close in their lives rather than those on the outside of their lives.”
Bibliography

2) Wedding Tourism Insights: Key market trends and analysis of wedding tourism 2018, https://www.researchandmarkets.com/research/6lll74/wedding_tourism?w=4
7) https://foe.scot/resource/greenweddings/