

BUSINESS INSIGHTS ROMANCE TOURISM NICHE RESEARCH





PRELUDE

In efforts to propel Aruba's road to discovery and coming stronger out of this pandemic, we as a nation need to reinvent ourselves. Through niche research, completed by Aruba Tourism Authority, we are providing you with free business highlights and insights that can be applied to your business with the purpose to create additional value to your operation, resulting in higher revenue as we meet the needs of ever-changing visitors.

The below summary focuses on further understanding and developing the Niche segment directed on Romance. Aruba has a well-established wedding and honeymoon market with excellent weather conditions, as it is located south of the hurricane belt and has favorable conditions year-round. The weddings market is a very valuable sector for Aruba, generating greater expenditure than the cruise market, and it fits well with Aruba's need to attract younger visitors and future returners. By increasing the range of activities that appeal to Millennials, who prefer experiences to things, Aruba could tap into the trend for weddings to become experiential vacations for couples and guests.



01. DEFINITION

ROMANCE TOURISM THE ART OF WEDDING AND HONEYMOONS IN ARUBA

Wedding and honeymoon tourism is defined as getting married and/or honeymooning away from home and many people travel abroad. It is also referred to as a Destination Weddings and overseas travel is often synonymous with the bride and groom taking their vows in a holiday destination or unusual location.



02. THE GLOBAL PICTURE

MARKET SIZE, VALUE, TRENDS



The global wedding industry is valued at an estimated US\$300 billion according to IBISWorld, and is growing. While general consumer spending is in decline, the trend for 'splurging' on the 'fairytale wedding' is on the rise and set to increase. Research conducted by The Knot magazine in 2015 found that between 2010 and 2015, the average cost of a wedding in the US increased by more than US\$5,500 while in Spain, the overall budget on weddings in 2014 increased by 31% to €16,500. In China, it is anticipated the wedding industry will increase in value from US\$80 billion to US\$120 billion over the next few years.

The US is the leading source market for destination weddings, which currently accounts for US\$16 billion in annual spending while honeymoons command US\$12 billion annually.

US

With a wedding industry worth US\$50 billion, statistics compiled by Tripsavvy/ Ampersandtravel (2019) in on the US market found that:

- On average 2.4 million weddings are performed in the US each year.
- With 44,230 weddings being held each weekend.
- Weddings are a \$50 billion industry annually.
- A traditional American wedding costs on average \$35,329, the cost per-guest is \$268
- \$72 billion is spent on weddings in the US each year.
- 19% of couples' parent's pay for the wedding. Nearly a third pay for it themselves and 15% share the cost with both sets of parents.
- The average age of brides is 29 years and for grooms 31 years.
- The average number of guests attending is 136.
- There are around 23 million bridesmaids and groomsmen a year.
- Each guest spends on average \$703 to attend a wedding.
- Each guest to a bachelor party spends on average \$738 & a bachelorette party spends \$472.



- \$19 billion is spent on wedding gifts.
- \$70-\$100 is the average spent on a gift per person.
- 88% of American's marry at least once, and one-third of those getting married have had previous marriages.
- 43% of weddings are officiated by a friend or family member.
- Only 33% of weddings took place in a religious institution last year.
- Brides spend on average \$1,564 on a wedding dress.
- Couples spend on average \$1575 on a wedding band.
- 48% launch a wedding website.

Destination Weddings

- 24% of weddings are destination weddings each year.
- 80% of couples who have a destination wedding have been married before.
- The average destination wedding costs US\$28,000.
- Destination couples spend an average of US\$8,200 on their honeymoon, more than

03. COVID & POST COVID RECOVERY

one-third more than traditional wedding couples do.

- 9 out of 10 couples say weather is a key factor in selecting a destination.
- The most popular months for destination weddings, in order of popularity are: October, September, June, August, May and July. Followed by December, November/April (tie), February, March and January the least popular month.

Honeymoons

- Couples spend an average of US\$4,466 on their honeymoon, which lasts an average of eight days, three times more than the average cost of a vacation. Luxury honeymooners (15% of the market) spend an average of US\$9,954 for an 11-day holiday.
- Honeymoons account for around 14% of the entire wedding budget.
- 75% of honeymoons are taken in domestic US locations – Hawaii, Florida, California and Nevada.

UK

The UK wedding market wedding statistics in 2019 compiled by Guides for brides illustrates the following data:

- A typical wedding budget for a UK wedding is £13,000 with the average being around £17,500. And estimated 42% of UK weddings have a budget of £10,000
- Overseas UK weddings tend to be more expensive than a stay at home, averaging around £16,000
- Summer time (40.7%) and autumn (28.7%) are the more popular season to get married.

Trends

The International Wedding Trend Report 2017 found that destination weddings are increasingly becoming akin to vacations as couples utilizing the extra time together to enjoy a full wedding weekend and enjoy time with their guests. Additional activities such as lawn games, hiking, yoga with the women add value to the stay as

guests have more of a holiday by staying for an extra day or two.

Another key trend is that children occupy a key role as 88% of destination weddings have children in attendance.

Weddings in Unusual Venues

For those looking for something original and unique, there are many unusual places that couples find to make a statement:

- Theme parks and tourist attractions – The London Eye, London, UK; Disneyland; museums and zoos
- Underwater – several locations including the Hotel Metropole, Monte Carlo; Aquaworld, Cancun; the Bahamas; Jules Undersea Lodge, Florida; underwater chapel in Bora Bora, South Pacific.
- Aquariums are also popular choices with bedroom suites and reception rooms within the aquariums and surrounded by marine life
- Converted buildings – factories, warehouses, monasteries, aircraft hangars
- National parks, conservatories and botanical gardens
- Remote outdoor sites – at the top of/by a volcano, on top of a glacier, on top of a Mayan temple
- On a boat – sailboat, yacht, riverboat, ferry
- Tree houses
- Caves – several sites in the UK (Wookey Hole, Devon; The Caves, Edinburgh; Llechwedd Slate Caverns, Wales) Ice caves in Canada; Norse caves in Iceland; Caves in the Ozarks, Missouri;
- Extreme weddings – bungee jumping, , abseiling, dangling from a rock face, on a rollercoaster, skiing/snowboarding, water-skiing, jet skis and jetpacks, wing walking, skydiving, zero-gravity, hot air ballooning.



**ACCORDING TO DATA AND STATISTICS FROM THE KNOT,
IN 2020, COVID IMPACTED JUST ABOUT EVERYTHING
ACROSS THE WEDDING INDUSTRY, INCLUDING THE AVERAGE
WEDDING COST AND MORE PRE-WEDDING-RELATED EVENT COSTS.**

Nevertheless, the data still indicates a broader, industry-wide impact of the pandemic on the average wedding cost in America. Based on our respondents' answers involving spend on ceremony and reception, we were able to determine the 2020 national average cost of a wedding is \$19,000, a drop from 2019's average wedding cost of \$28,000. This number again accounts for the ceremony and the reception, and COVID, of course, has impacted both. The average wedding cost is typically influenced mostly by the guest count, the venue, and the format of events, which have all been upended by the pandemic.

Therefore, the average cost of a wedding in 2020 was heavily skewed.

The approximate average for couples' 2021 receptions is roughly \$22,500, right on par with past spend on wedding receptions. In 2019, the average cost of a wedding reception per couple was \$23,000. As with every year, keep in mind that the average wedding cost is just that: an average dollar amount. For reference as 2020 has been a non-traditional inflection point in weddings, we also share complete 2019 Real Weddings Study data below.



AVERAGE COST OF A WEDDING IN THE U.S. BY STATE

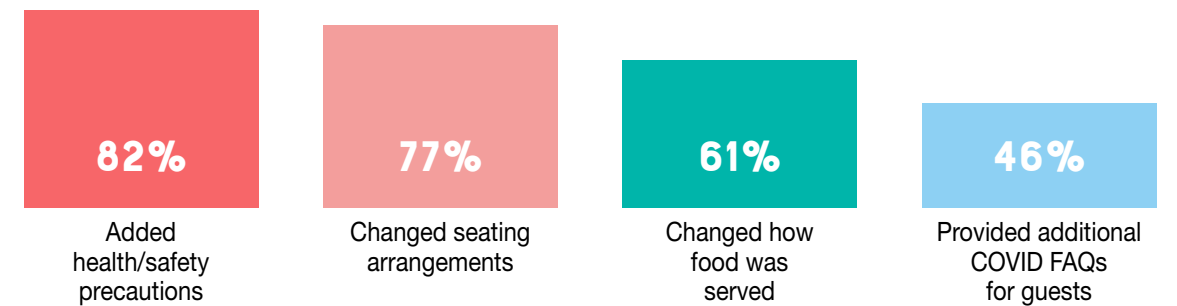
Alabama	\$25,500	Louisiana	\$33,900	& South Dakota	
Arkansas	\$21,800	Maine	\$33,500	Ohio	\$29,300
Arizona	\$29,400	Maryland	\$33,800	Oklahoma	\$21,200
California	\$39,000	Massachusetts	\$43,600	Oregon	\$22,400
Colorado	\$30,000	Michigan	\$29,700	Pennsylvania	\$35,900
Connecticut	\$41,000	Minnesota	\$28,800	Rhode Island	\$49,800
Delaware	\$34,900	Mississippi	\$23,800	South Carolina	\$30,600
DC	\$40,600	Missouri	\$26,600	Tennessee	\$26,900
Florida	\$30,600	Montana	\$23,000	Texas	\$30,200
Georgia	\$30,900	Nebraska	\$23,300	Utah	\$19,700
Hawaii	\$32,900	Nevada	\$22,500	Vermont	\$38,300
Idaho	\$19,800	New Hampshire	\$32,100	Virginia	\$33,300
Iowa	\$22,600	New Jersey	\$53,400	Washington	\$25,600
Illinois	\$39,700	New Mexico	\$25,600	West Virginia	\$26,500
Indiana	\$22,800	New York	\$48,600	Wisconsin	\$27,800
Kentucky	\$23,900	North Carolina	\$29,500	Wyoming	\$19,800
Kansas	\$22,400	North Dakota	\$29,200		

Emphasizing the opportunities that weddings still have for Aruba as a destination wedding market from US travellers.

Micro weddings (less than 25 guests), Mini-mony (less than 10 guests) and Virtual \$3000 weddings are rising in popularity as result of the pandemic. The general wedding industry growth in the US is showing a decrease of 7.1% every

year. Something to look out for in the coming years. There is potential as well in Post-ceremony Prequel celebrations, meaning that the due to the pandemic, the celebration did not take place as intended and subsequent ceremonies could be a new market for married couple still wanting to have their lavish wedding. A top priority at ceremonies/reception now are health and safety measures according to the Know 2020 wedding report.

CHANGES MADE TO CEREMONY AND/OR RECEPTION DUE TO COVID



TOP HEALTH PRECAUTIONS

- 1 Provided hand sanitizer
- 2 Tables properly distanced
- 3 Encouraged social distancing
- 4 Staff required to wear mask
- 5 Offered masks to guests

** This has been calculated by combining the total cost of tens of thousands of weddings, then dividing that sum by the number of couples surveyed*

04. PROFILE OF CONSUMERS

THE LARGEST CONSUMER GROUP FOR THE WEDDING MARKET IN THE WORLD TODAY IS THE MILLENNIALS. BASED ON INSIGHTS GAINED BY THE KNOT'S WEDDING RESEARCH FOR 2019, TODAY'S COUPLE HAVE BEEN ENGAGED FOR 15 MONTHS AND HAVE A FOUR WEDDING RELATED EVENTS. THE FOLLOWING DEPICTS THE CHARACTERISTICS FOR THEIR WEDDING.

TODAY'S COUPLES

131

Average Guest Count

32

Average Age

10

Size of Wedding Party



DARK BLUE
Most Popular Wedding Color

21%

Have a
Destination Wedding

83%

Set Up
a Registry

Millennials are keen adopters of new technology, heavy users of mobile devices and several forms of social media, care greatly about trends and once-in-a-lifetime experiences for themselves and their wedding party, and are budget-conscious.

Destination weddings are particularly favored by Millennials on account of several factors:

- Destination weddings can be more affordable than a traditional wedding (fewer guests, guests pay their way, many resorts throw in 'extras') and there are good travel deals for couples booking far in advance.
- Social media gives Millennials easier access to wedding planning and sharing their wedding experience with families and friends through specifically designed apps such as Wedpics, creating unique hashtags, and broadcasting live streaming of the ceremony through apps like Periscope.
- Millennials prefer 'experiences' to 'things', a

motivation that extends directly to destination weddings, and an event that is less about the ceremony and reception and more about the 'journey'.

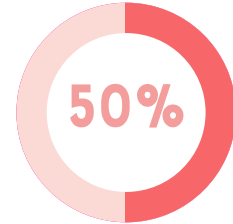
- The exotic and unique appeal to the Millennials and a wedding far from home is an exciting consideration. An Eventbrite study found that almost 70% of Millennials experience FOMO (fear of missing out) which makes them more likely to push the boat out on 'life events' – engagements, weddings, baby announcements, and so on.

Top five food trends to take into account that speak to the American market (see next page). For them it is all about the experience, their guest experience is of utmost importance when planning their big day. So opportunities lie in not only providing the best quality and service to the bride and groom but also cater and accommodate the needs of the wedding party as brought forward by the bride/groom.

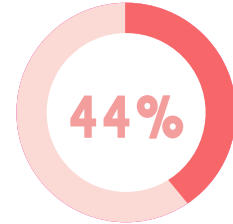
TOP FIVE FOOD TRENDS



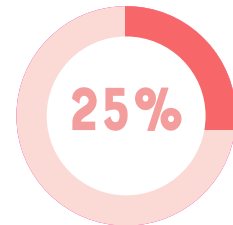
76%
of couples
serve wedding cake



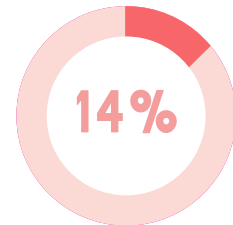
50%
Have a
Campagne Toast



44%
Provide
a Dessert Bar



25%
Serve late-night
snacks



14%
Incorporate food based
on culture/background

However, with research showing that 80% of couples on a destination wedding have been married before, it is clear that there is also an older demographic in play – the Generation X'ers, those born between 1964 and 1979, aged 37 to 53.

Tripsavvy's research also exposed that 70% of destination wedding brides/grooms have graduated college and have an average household income of US\$110,000 – a clear sign that there is an older demographic in evidence who is more settled in their career.

The LGBT market is another key market for destination weddings and one which is experiencing growth since same-sex marriage was legalized across the whole of the US in 2015 and in 2014 in the UK. Almost half of LGBT couples consider their wedding to be a destination affair.



05. OVERVIEW OF ARUBA'S PRODUCT

ARUBA HAS A WELL-ESTABLISHED WEDDING AND HONEYMOON MARKET WITH EXCELLENT WEATHER CONDITIONS, AS IT IS LOCATED SOUTH OF THE HURRICANE BELT AND HAS FAVORABLE CONDITIONS YEAR-ROUND. IT ALSO HAS A WIDE RANGE OF WELL-ESTABLISHED RESORTS AND UNUSUAL LOCATIONS WHERE WEDDINGS CAN BE HOSTED.



There are a significant numbers of resort hotels that cater for the market. TripAdvisor's top 5 luxury hotels for 2021 were:

- Hilton Aruba Caribbean Resort & Casino
- Marriott's Aruba Ocean Club
- Hyatt Regency Aruba Resort & Casino
- Bucuti & Tara Beach Resort
- The Ritz-Carlton
- OCEANZ Boutique Hotel

DestinationWeddings.com lists the following establishments as suitable for destination weddings in Aruba:

- Barcelo Aruba, Palm Beach
- Riu Palace Antillas, Palm Beach
- Riu Palace Aruba, Palm Beach
- Divi Dutch Village, Eagle Beach
- Divi Aruba Phoenix, Palm Beach
- The Ritz-Carlton, Palm Beach
- Hilton, Palm Beach
- Renaissance Aruba Resort & Casino, Oranjestad
- Tamarijn Aruba All Inclusive, Eagle Beach
- The Mill Resort & Suites, Palm Beach
- Tropicana Aruba Resort & Casino
- Amsterdam Manor Beach Resort, Eagle Beach
- Brickell Bay Beach Club & Spa
- Occidental Grand Aruba
- Tierra del Sol, Spa & Country Club
- The Mill Resort & Suites
- The Westin Resort & Casino
- Includes the above luxury resorts as well.

ARUBA'S WEDDING MARKET

The Wedding Economic Impact Study, commissioned by ATA in 2017, calculated that weddings in Aruba currently account for 6.1% of total room nights. The average number of guests is 47.5 per wedding with the average guest staying 6.3 nights and with a higher than average spend per trip.

The total direct spending of the weddings market in Aruba was estimated to be US\$107.3 million, representing 7.3% of total tourist receipts in 2016 and 4% of GDP. The study showed the weddings market generated greater expenditure than the cruise market.

The weddings market is also an important source of unique visitors for Aruba as most wedding visitors are first-timers. These visitors are well educated and have high incomes; they demand quality and are more concerned with having a memorable experience than with price.

06.

COMPETING DESTINATIONS



According to Tripsavvy, the leading destinations for out-of-town weddings for the US market in 2016 were:

LAS VEGAS	80,000
HAWAII	20,000
US VIRGIN ISLANDS	5,100
JAMAICA	5,000
BAHAMAS	4,000

Mexico, California & Florida were also important locations for destination weddings

The UK's Wedding Trend Report 2017 identified several top locations for destination weddings from the UK market including Italy, France, Thailand, Iceland, Morocco, Spain, the US, Mexico, Jamaica, and Greece. There is increasing evidence that Spain has become more popular for destination weddings in recent years, a fact that is attributed to fine weather, availability of luxury hotels, exotic locations, and budget-friendly prices.

However, tropical destinations continue to be popular, and that trend is anticipated to continue into 2018 and beyond. In 2015 Islands Magazine put Aruba at the top of its (subjective) list of Best Wedding Destinations, citing the availability of a wide range of hotels from high-rise to boutique on beaches, ample nightlife, and good weather away from the hurricane belt. Other destinations were cited as Belize, Florida, Hawaii, Tahiti, the Bahamas, and the Dominican Republic, along with many other Caribbean islands.

In 2017, CNN's 8 best places for a destination wedding included a broad range of locations across a variety of tastes and budgets, a listing that feeds into the needs of Millennials for an unforgettable experience:

1. **BEACH WEDDING** – The Resort at Pedregal, Mexico
2. **COUNTRY WEDDING** – Leeds Castle, Kent, UK
3. **CITY WEDDING** – Tribeca Rooftop, New York, USA
4. **INTIMATE WEDDING** – Helena Bay Lodge, New Zealand
5. **BIG WEDDING** – InterContinental Danang Sun Peninsula Resort, Vietnam
6. **BUDGET WEDDING** – Hotel Riu Montego Bay, Jamaica
7. **SHOWSTOPPER WEDDING** – Grand Hotel Tremezzo, Italy
8. **SAME-SEX WEDDING** – Korakia Pensione, Palm Springs, USA





ATA COMPETITOR DESTINATIONS ARUBA'S WEDDING MARKET

The Aruba Tourism Authority (ATA) identified Aruba's five main competitor destinations as The Bahamas, Jamaica, St. Lucia, St. Martin, US Virgin Islands. The niche product offer of each of these competitor destinations was analyzed by assessing the destination's online marketing activity and the reviews and coverage of the destination by key travel bloggers, review sites, and tour and experienced distributors. This methodology was used to replicate what a potential visitor would find by undertaking Internet research of each destination. Aruba's niche product was reviewed using the same methodology.

BAHAMAS

'The Bahamas lives up to its title as the World's Leading Wedding Destination 2015' – more than 700 islands with numerous unique locations.

Things to know:

- Wedding Professionals
- Wedding FAQs
- Licence Requirements
- Honeymoon Registry
- Ceremonies & Venues

JAMAICA

The world's leading wedding destination 2020 goes to Jamaica. Weddings and Honeymoons are a significant niche in Jamaica and it appears to be a straightforward process following the application of a marriage license for US citizens; additional rules apply to Europeans. Several companies/organisations can help plan weddings. Honeymoon activities and attractions have been organized as part of the main niche activities. Destinations tend to be resort hotels that have in-house coordinators to help plan e.g.:

- Half Moon Resort, Montego Bay
- The Couple Tower Isle, Ocho Rios
- Villas Sur Mer Boutique Hotel, Negril
- The Caves, Negril
- Round Hill Hotel & Villas, Montego Bay
- Rockhouse Hotel, Negril
- Sandals Royal Plantation, Ocho Rios
- Jamaica Inn, Ocho Rios
- Couples Negril
- Jewel Dunn's River Beach Resort & Spa, Ocho Rios
- Jakes Hotel, Villas & Spa
- Beaches Negril Resort & Spa
- Sandals Ochi Beach Resort, Ocho Rios

ST LUCIA

- Weddings in Paradise... Honeymoon Dreams... Romantic Treats
- Wedding brochure to download.
- Easy process – no minimum residency; apply for licence 2 days in advance or even on same day.
- Several resorts with different profiles to attract different couples' needs. Many have dedicated wedding coordinators. Several independent wedding planners.
- Unique locations – waterfalls, tropical gardens, historic battlements, lighthouse, cliff top villa, plantation estate

ST MARTIN

(Not obviously promoted as a wedding destination by the tourist board; it is probably more common as a honeymoon destination.) Getting married in St Martin appears to be largely aimed at French nationals.

However, US magazine Wedding Bells has identified '5 jaw-dropping spots to get married in St Martin' – possibly paid for by the hotel group?:

- The Beach, Sonesta Great Bay Beach Resort
- The Point Pool, Sonesta Ocean Point Beach Resort
- The Point Gazebo, Sonesta Maho Beach Resort
- Azul Rooftop, Sonesta Ocean Point Resort
- The Royal Pavilion, Sonesta Maho Beach Resort

US VIRGIN ISLANDS

USVI is a popular destination for Americans for both weddings and honeymoons.

The Knot claims it is one of the most hassle-free places to have a Caribbean destination wedding on account of direct flights to St Thomas; competitive airfares; US dollar the official currency; good cell phone coverage.

The sector is significant and organization needs are accommodated – wedding planners/consultants, florists, photographers/videographers, places of

worship, weddings at sea, DJs, beauty and style.

My Wedding lists the following 'favourite' USVI resorts:

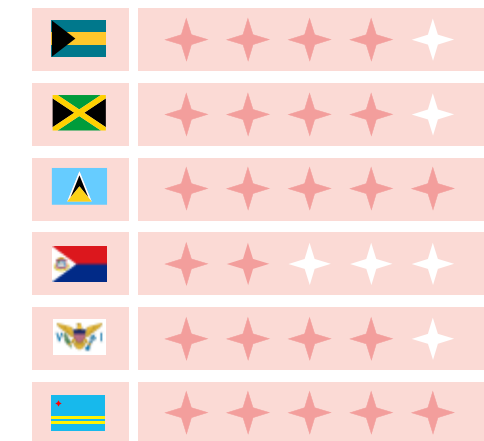
- Caneel Bay Resort (St John) currently closed
- Club St Croix Beach and Tennis Resort
- Sugar Beach Resort (St Croix)

Local wedding planners (USVI Wedding) features the following destinations:

- Annaberg Plantation Ruins – a former sugar mill and plantation ruins
- Hawksnest Beach
- Trunk Bay (the most popular beach for sunset wedding ceremonies)
- Cinnamon Bay Beach
- Luxury Villas on St John

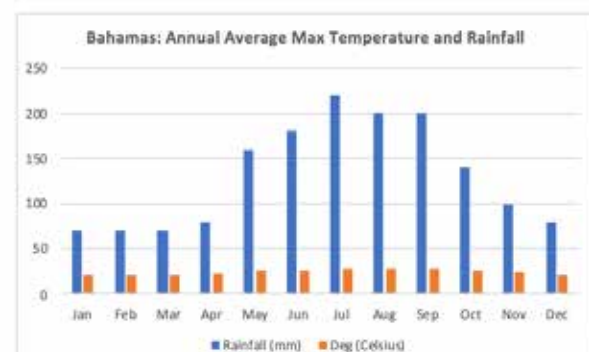
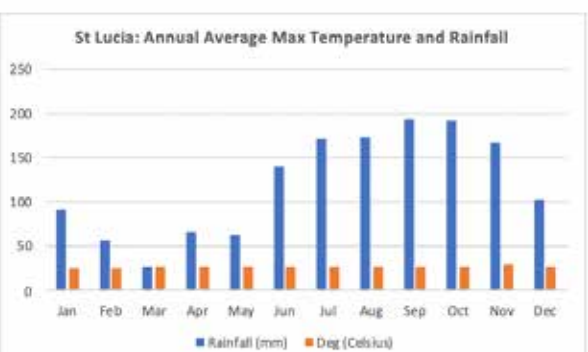
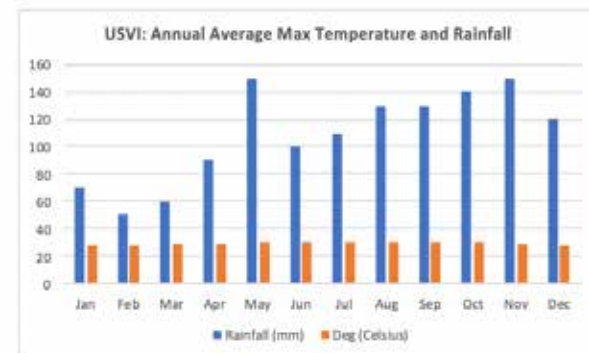
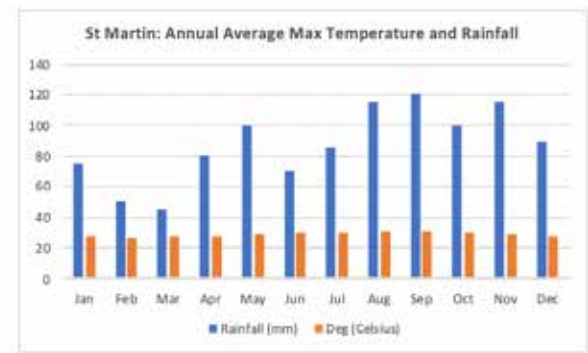
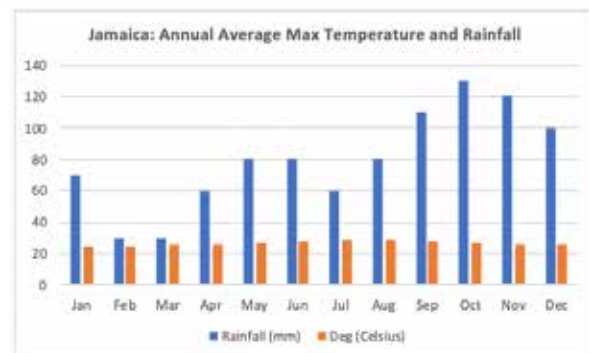
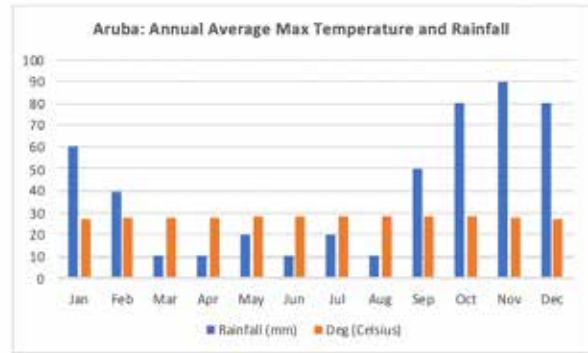
CONCLUSION: ARUBA'S CURRENT POSITIONING

Aruba's has a strong position in the Weddings and Romance market compared to its main competitors, although it has stiff competition, particularly from St. Lucia.



Aruba's prime advantage is the reliability of the weather (see weather charts below). It has a higher proportion of sunny days than any of the other destinations and therefore could claim to be the destination most likely to guarantee a dry and sunny wedding day.

07. SWOT ANALYSIS OF ARUBA



STRENGTHS

- Excellent weather conditions with very low risk of rain on the 'big day'
- Wide range of suitable hotels and resorts
- Established market
- Located outside the hurricane zone

WEAKNESSES

- Aruba is not well recognised as a wedding destination and lacks brand recognition in this market
- Not enough emphasis on other activities available
- Product and service delivery is not reliable and in danger of tarnishing the image of the wedding planners' industry.
- Developing standards and registration requirements is needed from ATA.

OPPORTUNITIES

- Develop new boutique and experience options to entice the Millennial market
- Winter (high season – airfare and accommodation very expensive) is the wedding low season so promoting Winter Weddings (Nov-Mar) in Aruba could be an ATA task.
- Work on the laws to get Same Sex weddings legalized here. Now, we can only do Beach blessings for same sex couples and it would open up another niche if we could establish legal weddings for same sex couples.

THREATS

- Climate change and increased rainfall and beach erosion



08.

RECOMMENDATIONS

MARKET OPPORTUNITIES

The Weddings market is a very valuable sector for Aruba and it fits well with Aruba's need to attract younger visitors and future Returners. The key market segments are Millennials (aged 18-37), Generation X who may have been married before (aged 38-54), and the LGBT segment, with almost 50% of couples interested in destination weddings.

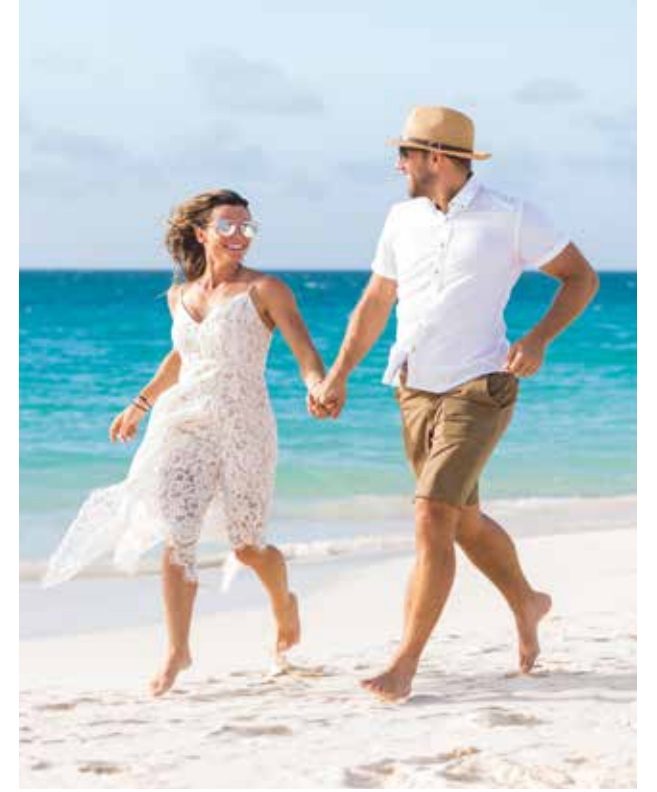
Good weather is a key motivator for the Weddings market with 90% of couples in the US saying that weather is a key factor in selecting a destination. Consequently, Aruba also has a strong competitive advantage as its climate is drier than all of its main competitors and its location, south of the hurricane belt, gives Aruba a distinct advantage during the wedding season, which tends to coincide with the hurricane season.

Aruba can offer a range of venues that meet the growing demand for unusual locations including underwater, converted buildings, national park and botanical gardens, remote outdoor sites, on boats or in caves. However, these need to be developed, used and promoted. This requires intention of vendors to go this way and make a unique experience for potential wedding clients

Increasing the range of activities that appeal to Millennials, who prefer experiences to things that fit with their lifestyle (and guests) and personalities would tap into the trend for weddings to become experiential vacations for both couples and guests.

There is a close connection between the romance market and wellness, and marketing communications can focus on wellness messaging as well as highlighting additional activities such as yoga, walking, kite and windsurfing or community engagement. To attract this market there should be less focus on partying and more emphasis on wellness, relaxation, nutritious food, and a peaceful boutique environment.

The Millennial market is price sensitive and weddings in Aruba can be of good value compared to a domestic wedding. The average cost per person in the US is around 30% higher than in Aruba and a destination wedding usually involves fewer guests.



Currently, the majority of weddings in Aruba are beach blessings, rather than legal marriages. Wedding Planners in Aruba are seeing a growth in demand for legal marriages and would like to promote the opportunity for couples to get legally married in Aruba. To be able to offer this to same-sex couples the law would need to be changed. This is seen as a significant potential market.

Cruise operators are developing Wedding Cruises, which include marriage ceremonies on the beach. This would be low value compared to stay-over weddings but could generate return visits from couples who want to return to the destination where they got married.

Developing the wedding market requires high quality experiences and quality assurance for those offering services in the wedding market is critical - the planning, decorations, flowers etc. Hence setting specific standards and constantly monitoring and requiring service providers to meet high standards is essential to grow and develop this niche.

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