



PACIFIC

# Wedding & Honeymoon

STUDY REPORT 2015



South Pacific Tourism  
ORGANISATION



Pacific Regional Tourism Capacity  
Building Programme

This report has been produced by Tropics Tourism & Marketing Services within the framework of the Pacific Regional Tourism Capacity Building Programme (PRTCBP), a component project of the Strengthening Pacific Economic Integration through Trade (SPEITT) programme which is financed under the 10th European Development Fund. The PRTCBP is implemented by the South Pacific Tourism Organisation. The report does not necessarily reflect the views and opinions of the European Union.

## TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	4
1 GLOSSARY OF TERMS.....	6
2 ABOUT THIS REPORT.....	7
3 PACIFIC ISLANDS COUNTRIES TOURISM MARKET .....	8
3.1 Tourism numbers to Pacific Islands Countries .....	8
3.2 Source Markets For Tourism In Pacific Island Countries .....	9
4 GLOBAL WEDDING AND HONEYMOON MARKET .....	10
5 MARKET SIZE AND CHARACTERISTICS .....	12
5.1 Characteristics of THE Global Wedding Market .....	13
5.2 Characteristics of Global Honeymoon Market .....	17
5.3 Global Wedding & Honeymoon Booking & Travel Behaviour.....	20
5.4 Weddings And Honeymoons Source Market Characteristics.....	21
6 FORECASTED TRAVEL TRENDS.....	38
6.1 Global Travel Trends.....	38
6.2 Wedding and Honeymoon market trends.....	39
6.3 What is driving travel trends? .....	41
6.4 What's next in travel trends? .....	41
7 DISTRIBUTION CHANNELS & RECOMMENDATIONS.....	42
7.1 Distribution Channels .....	42
7.2 Source Market Distribution and Trends .....	43
7.3 Distribution Recommendations for Operators.....	45
8 MARKETING CHANNELS AND RECOMMENDATIONS.....	46
8.1 Marketing Channels.....	46
8.2 Source Market Marketing Trends.....	47
8.3 Marketing Recommendations to operators .....	49
9 TRAVEL TRADE IN SOURCE MARKETS.....	50
10 INDUSTRY BODIES, RESOURCES & ASSOCIATIONS.....	54
10.1 Global and regional bodies .....	54
10.2 Industry bodies and associations in key source markets .....	54
10.3 Other Resources .....	55
11 SPECIALISED MEDIA & PROMOTIONAL TOOLS.....	56
11.1 Australia .....	56
11.2 New Zealand .....	57
11.3 North america .....	57
11.4 UK /Europe.....	58
11.5 Asia.....	58

## EXECUTIVE SUMMARY

### PACIFIC ISLAND COUNTRIES TOURISM MARKET

1.7 million visitors | Over 60% holiday tourists

The 18 South Pacific Tourism Organisation (SPTO) member countries and territories welcome around 1.7 million visitors annually. Holiday tourists account for over 60% of these visitors. The short haul markets of Australia and NZ provide around 52% of visitors. Established long haul markets from UK/Europe and North America are the next largest markets with 21% of arrivals. While the emerging markets of Asia currently provide around 12% of visitors.

### GLOBAL WEDDING & HONEYMOON TOURISM

5.5 Million globally | Over 15% of holiday arrivals

There are 18 million marriages in major tourism source markets for Pacific Island countries. These marriages generate a potential market of 5.5 million wedding and honeymoon tourists. Approximately 15-20% of all holiday arrivals into PICs are travelling as a wedding party or honeymoon couple.

### WEDDING & HONEYMOON MARKET CHARACTERISTICS

Distance and Culture characterise market

Short haul weddings generate larger groups. Long Haul it's just couples.  
Short haul honeymoons its about price and time. Long Haul inspires experiences.  
Cultural influences play a role in characterising the weddings and honeymoon market.  
This especially applies for Asia, where weddings at home are preferred and honeymooners will take a short overseas trip, but will travel further to be different.

### WEDDING AND HONEYMOON MARKET TRENDS

Status | Technology | Aspiring Destinations

In emerging markets travelling where celebrities have been is an important status symbol. Sharing footage of your overseas wedding with friends who could not be there or posting images of you enjoying your romantic honeymoon location are pushing social technology to the fore.  
Discovering new destinations on the horizon is driving much more personalised luxury travel.



## DISTRIBUTION FOR WEDDINGS AND HONEYMOONS

### Changing trade | Word of Mouth and The Web

Retail travel agents are becoming home based advisors and wholesale travel agents are reshaping as specialist travel companies.

But there is nothing more effective than clients having a great wedding day or romantic honeymoon. With the advent of the internet, digital and social media have also become essential channels to distributing wedding and honeymoon tourism product.

## MARKETING WEDDINGS AND HONEYMOONS

### Choose appropriate channels with multi-layer content

Word of mouth and having responsive and interactive content on the web are major drivers to successfully marketing wedding and honeymoon tourism, however it is important operators also engage with the market with multi-layer content, especially in social media.

Traditional channels such as magazines and wedding expos can still provide returns, but these need to form just a part of operators marketing strategy.

## WORKING WITH THE TRAVEL TRADE

### Gain greater access to market and enhance networks

There are a growing number of niche operators specialising in weddings and honeymoons. They are passionate about the destinations and product they sell. We explore how Pacific Islands countries wedding and honeymoon operators should consider the merits of working with selected trade partners, online and traditional. The distribution and marketing networks they can deliver in source markets help diversify your market and bring new opportunities.

## INDUSTRY BODIES, MEDIA AND OTHER RESOURCES

### We provide a comprehensive list of global contacts

The final sections of this report list a range of organisations, associations, media and promotional tools that PICs wedding and honeymoon operators can access to further understand the wedding and honeymoon market, as well as develop, distribute and market their product.

## 1 GLOSSARY OF TERMS

ACP	African Caribbean Pacific Group of States. Organisation of 79 states bound together by the ACP-EU partnership agreement.
DIY	Do-it-yourself
EDM	Electronic Data Mail (also known as e-Newsletters or Data Base Mailing)
EU	European Union
FSM	Federated States of Micronesia
FIT	Free Independent Travel
ITB	Internationale Tourismus-Börse is the world's largest tourism trade fair. Held annually in both Berlin (ITB Berlin) and Singapore (ITB Asia)
IVS	International Visitors Survey. Conducted by many countries, generally at airports or online, of a sample of visitors. Used as a research tool for understanding visitor profiles.
NTO	National Tourism Office
NZ	New Zealand
OTA	Online Travel Agent
PICs	Pacific Island Countries
PNG	Papua New Guinea
SME	Small-medium enterprise (business)
SEO	Search Engine Optimisation
SPTO	South Pacific Tourism Organisation
UK	United Kingdom
UNWTO	United Nations World Tourism Organisation
USA	United States of America
VFR	Visiting Friends and Relatives

## 2 ABOUT THIS REPORT

### BACKGROUND

This study report forms part of a series of Niche Market Research being undertaken by the South Pacific Tourism Organisation (PICS). To date studies have been carried out into: Cultural and Heritage Tourism, Backpacker Tourism and Dive Tourism.

A further two studies have now been undertaken: Wedding and Honeymoon Tourism and Fishing Tourism.

### OBJECTIVE

The overall objective of this programme action is to strengthen the capacity of niche tourism operators in the PICs to compete more effectively in international niche tourism markets with the aid of relevant, practical and actionable market intelligence and guidance.

### METHODOLOGY

This study included primary face-to-face, Skype and telephone research with some 60 international travel trade promoting weddings and honeymoons in key source markets of Australia, NZ, North America (United States and Canada), Europe (UK, Denmark, France, Spain, Germany and Switzerland), Latin America (Peru), and Asia (Japan, South Korea, China and India). It also included more than 50 PICs tourism operators currently working within the wedding and honeymoon market across 10 PICs. This research was supported with 2 online surveys and extensive desk research.

Unless otherwise noted, statistical data, charts and diagrams in this report are based on research findings from this study as outlined above.

### PRACTICAL LIMITATIONS

There is very little official data on the weddings and honeymoons tourism market and most tour operators, NTOs or government statistics agencies do not segment honeymoon and weddings within tourism data.

The research in this study has therefore focussed on estimates of the shape and size of the market, identifying the key characteristics, distribution and marketing opportunities.

This has been done at a global and regional level.

### ACKNOWLEDGEMENTS

The authors would like to thank the many tourism professionals and travel companies in key source markets who have assisted with voluntarily providing confidential statistical information and commercial insights as part of the research undertaken for this report.

We would also like to thank the PICs tourism operators who voluntarily completed surveys and shared information about their current wedding and honeymoon business.

Finally we would like to acknowledge the assistance of the NTOs and the help provided by their overseas marketing representatives and operator representatives in Australia, NZ, China, India, South Korea, Japan, North America and UK/Europe.

### 3 PACIFIC ISLANDS COUNTRIES TOURISM MARKET

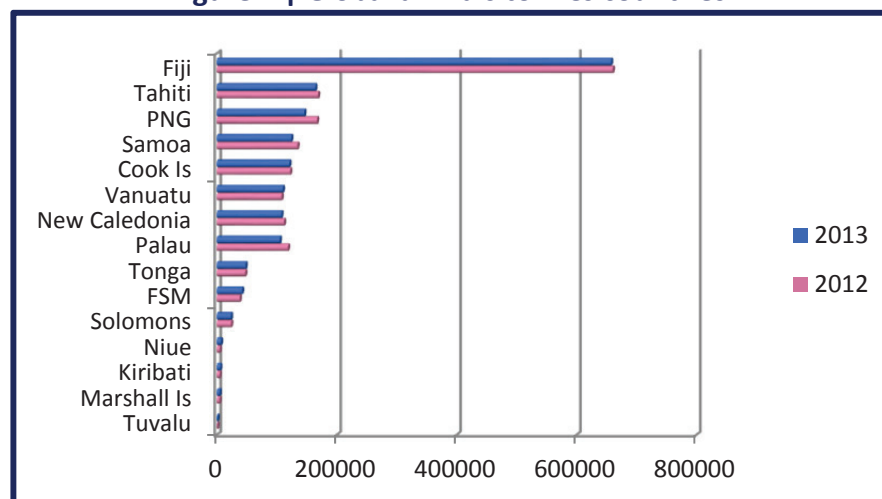
#### 3.1 TOURISM NUMBERS TO PACIFIC ISLANDS COUNTRIES

PICs currently welcome over 1.7 million<sup>1</sup> visitors a year. Representing around 60-65%<sup>2</sup> of arrivals, holiday visitors provide a major contribution to the economies of many countries and territories across the region. Tourism is one of the most important industries in the region.

Fiji, with the highest number of air services and hotel room inventory, accounts for approximately 40% of the total market. The next major destination is French Polynesia at around 10% of the total market. Both of these destinations also rank highest for holiday visitor arrivals.

Figure 1 below summarises arrivals in 2013 and 2012.

**Figure 1 | Global arrivals to PICs countries**



Source: PICS and NTOs

Across all PICs, arrivals are largely driven by air access and capacity. Fiji is the travel hub for the region and its gateway airport, Nadi, is the busiest for international flights in the region.

Fewer arrivals into many of the coral atoll small islands states, such as Kiribati, Marshall Islands and Tuvalu are a function of combined small populations with a lack of direct airline connectivity to major source markets.

<sup>1</sup> Based on SPTO visitor arrival statistics 2012 and 2013.

<sup>2</sup> Based on SPTO visitor arrival statistics 2012 and 2013



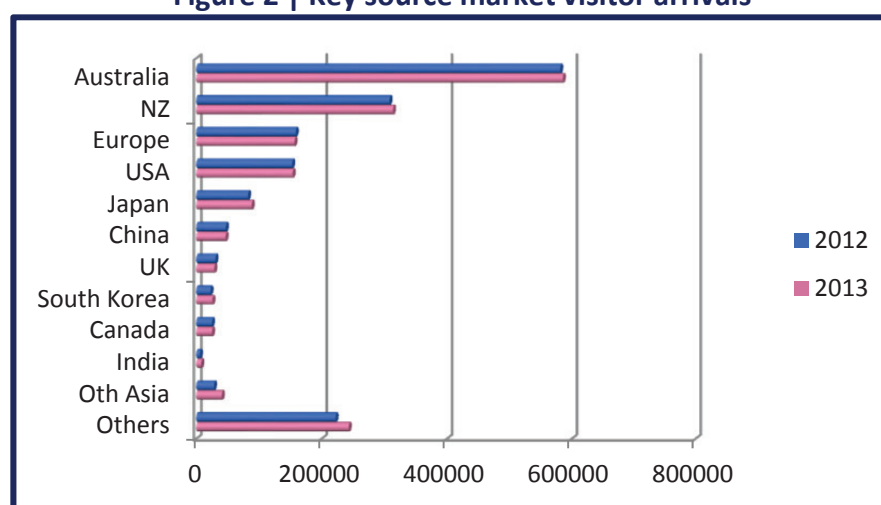
### 3.2 SOURCE MARKETS FOR TOURISM IN PACIFIC ISLAND COUNTRIES

The short haul markets of Australia and NZ provide the majority of arrivals into PICs. This is due to their proximity and historical political and cultural links. These arrivals are made up of a mix of business, holiday and VFR travel. Australia and NZ also are home to many PICs expatriates and communities and they are major contributors to travel around the region.

As French territories, New Caledonia and French Polynesia similarly have a high promotion of their arrivals from Europe, namely France. In northern PICs close ties with North-East Asia and the USA see those destinations providing the major share of arrivals.

Figure 2 summarises source market arrivals for 2012 and 2013.

**Figure 2 | Key source market visitor arrivals**



Source: PICS and NTOs. Note due to each country recognising source markets differently Some source market arrivals are included in Other Asia and Others.

From a holiday tourism perspective source markets for PICs can be divided into 3 categories.

#### Established Short Haul

Primary markets which have direct flights to most PICs, generally with flying time of around 5 hours. Australia and NZ are established short-haul markets for the Central and South Pacific, whilst Japan and South Korea are short haul markets for Palau and FSM

#### Established Medium- Long Haul

Secondary markets with over 6 hours flying time. Some have direct air services to the region.

- Asia (Japan and South Korea) – for the Central and South Pacific
- Australia and NZ – for Palau and FSM
- North America (Canada, United States) – all PICs.
- UK/Europe – all PICs.

#### Emerging Medium-Long Haul

Secondary markets which are emerging as major global tourism markets with significant year on year growth for the past 10 years.

- Asia (China and India) which are currently serviced via Hong Kong and/or Australia
- Latin America (Mexico, Peru, Chile, Argentina and Brazil) with links into French Polynesia and via the US and NZ/Australia.

## 4 GLOBAL WEDDING AND HONEYMOON MARKET

Tourism globally has been defined a number of ways. The United Nations World Tourism Organisation (UNWTO) official definition states, “Tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure.”

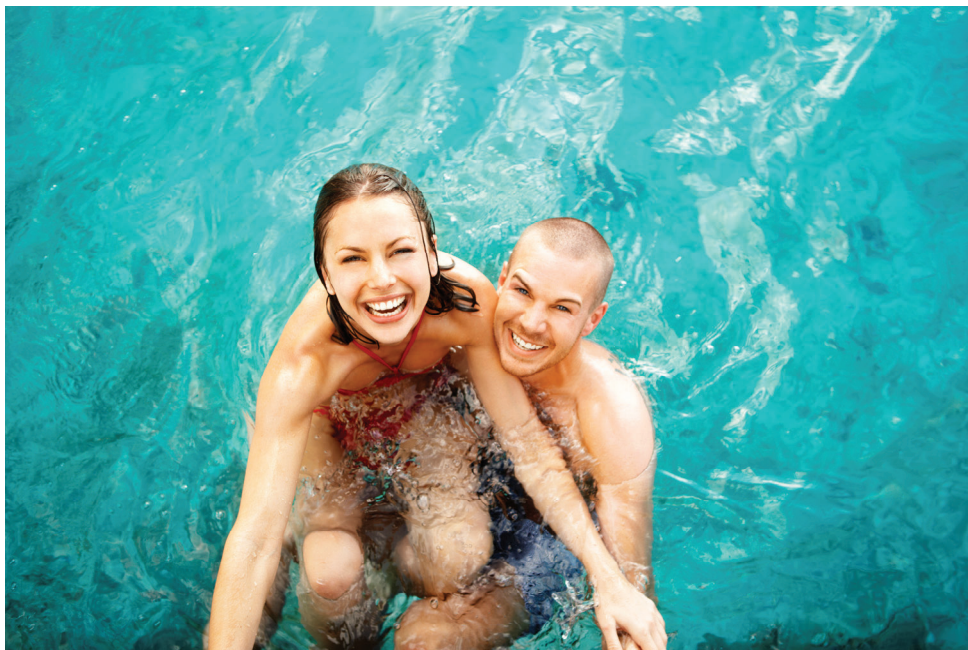
It has also been defined as leaving your normal place of abode to stay somewhere else for at least one night, but no longer than 12 months. The people who do this are often described as tourists. Such simple definitions however, can raise more questions than they answer. Tourism is not easy to define. Inevitably it requires a contextual definition.

In contextual terms, the Weddings and Honeymoons tourism market is essentially comprised of tourists who travel abroad for the one or both of two specific purposes:

***To hold their wedding event (marriage or commitment ceremony) overseas***

and/or

***Honeymoon overseas to celebrate their recent wedding event***



Vanuatu. Photo courtesy Vanuatu Tourism Office

Wedding tourism market includes a couple who hold their wedding event (marriage or commitment ceremony) overseas. The wedding event may also include close family and other relatives, friends and their families.

Reasons for people holding weddings overseas include:

- Couple looking for quiet wedding overseas.
- Couple on their second marriage and not requiring major event.
- Cost savings. In short-haul markets, overseas weddings can often be cheaper than in couples' country of abode.
- Desired location. Choice of location for ceremony and other aspects of the event (photography, reception) can be a major driver.

Honeymoon tourism is derived from couples whose main reason for travelling is to celebrate their marriage with an overseas honeymoon.

Reasons for honeymoon tourists taking their honeymoon overseas include:

- Couple seeking a special experience away from their usual place of abode to celebrate their marriage.
- Desired Location. For many a honeymoon is a once in a lifetime event and the choice of location is often a highly personal and emotive decision. Travelling to a much desired location is a strong driver for honeymoon tourists.

## 5 MARKET SIZE AND CHARACTERISTICS

In this section we discuss:

- Overall size of the wedding and honeymoon market
- Characteristics of the wedding market, including group sizes and what matters
- Characteristics of the honeymoon market, including spend, stay and what matters
- Booking and travel behaviour.
- Key source markets

For the purposes of clarity we have separated weddings and honeymoons in this section as each have distinguishing characteristics.

There are more than 18 million marriages held in major PICs source market countries every year. These marriages generate a potential market of just under 5.5 million wedding and honeymoon tourists travelling from these countries per annum.

Approximately 15-20%<sup>3</sup> of arrivals into PICs who identify the purpose of their travel as holiday/vacation are wedding and honeymoon tourists.

Table 1 below provides summary figures on marriages and potential honeymoon market size for total outbound travel in key PICs source markets. These figures reflect estimates based on best available data published between 2011 and 2014.

**Table 1 - Marriages in Source Markets**

Marriages in source markets and potential honeymooners					
Country	People Married (per annum)	Population	Population with passport	% with passport	Potential market size <sup>i</sup>
Australia	238,000 <sup>ii</sup>	23,130,900 <sup>iii</sup>	11,334,000	49% <sup>iv</sup>	116,600
NZ	43,300 <sup>v</sup>	4,442,000 <sup>vi</sup>	3,331,500	75% <sup>vii</sup>	32,500
Canada	296,000 <sup>viii</sup>	35,540,400 <sup>ix</sup>	24,878,300	70% <sup>x</sup>	207,200
USA	4,236,000 <sup>xi</sup>	318,882,000 <sup>xii</sup>	121,512,300 <sup>xiii</sup>	38.11%	1,614,300
EU	4,000,000 <sup>xiv</sup>	505,700,000 <sup>xv</sup>	252,600,000	71% <sup>xvi</sup>	2,840,000
China	26,047,200 <sup>xvii</sup>	1,347,350,000 <sup>xviii</sup>	18,300,000 <sup>xix</sup>	1.36%	353,800
Japan	1,322,000 <sup>xx</sup>	127,300,000 <sup>xxi</sup>	30,000,000 <sup>xxii</sup>	23.62%	312,000

*Note: All figures rounded to nearest 100 where available. No sufficient data available for South Korea, India or Latin America. Data Sources: Are noted in references at the end of this report.*

<sup>3</sup> With limited PICs NTO IVS data on weddings and honeymoons available, the percentages expressed are based on data collected from 50 PICs wedding and honeymoon operators and almost 60 source market travel companies who voluntarily responded to an online survey conducted for the purposes of this report. It should be noted that the resultant figures are generally between 5-10% margin of errors when compared to those countries which have recent IVS reports that include wedding and honeymoon data. This applies for each source market summary noted in this report.



## 5.1 CHARACTERISTICS OF THE GLOBAL WEDDING MARKET

International wedding tourism falls into these two main categories which characterise the global market.

### SHORT HAUL WEDDINGS – ITS MORE ABOUT GROUPS

<b>Ease of Access</b>	An affordable non-stop flight with duration of no more than 3-4 hours. Available infrastructure to cater for guests.
<b>Time Constraints</b>	Limited leave and/or guests only able to travel for a few days.
<b>Cost</b>	Venues generally cheaper than in their home country and easier for guests to attend.
<b>Wedding Tourists</b>	Encourage more family and friends to travel and generate larger wedding groups.

### LONG HAUL WEDDINGS – ITS MORE ABOUT COUPLES

<b>Status Symbol</b>	Looking for extraordinary photographic backdrops and exotic settings that will set them apart from others.
<b>Just Couples</b>	Weddings are mostly just couples looking for a quiet romantic location. They may have been married previously and are just a small celebration.
<b>Experiential</b>	More couples are looking to combine their wedding with other experiences and will travel further to seek those experiences.
<b>Less about Price</b>	Price not generally a concern. The location is the major driver.

### Checkpoint on wedding tourism

*Whilst not practical to estimate in terms of size; tourism operators, NTOs and tourism marketing agencies should not discount the market for couples wishing to renew wedding vows. This opens up another demographic that is generally older, more financially secure and more able to travel internationally for longer periods*

Whilst PICs may feature on many couple's list of highly desirable wedding destinations, key factors such as family and culture, distance, practicalities and cost strongly influence the final wedding decision.

**Family and Culture**

Family and cultural reasons usually determine when and where weddings take place, how many guests are invited and how the marriage will be celebrated. In many countries across the globe, overseas travel for marriage may not be an option for cultural reasons.

**Distance**

In most tourism markets, distance is a key determinant in travel decisions. Whilst wedding couples are generally less sensitive to distance, the needs of family and friends can be strong determinants in where couples choose to have their wedding.

A location closer to home will more likely be preferred by a couple who are wanting to include as many family and friends as possible. For this reason couples in Australia and NZ naturally prefer PICs such as Fiji and Vanuatu, along with Bali. In other source markets, such as North America wedding locations in Mexico, Caribbean and Hawaii are preferred. From Japan; Guam and Hawaii are popular.

**Practicalities**

In many major PICs source markets people only have limited leave time (such as one week in the USA or two weeks in Canada). For wedding guests this may also mean foregoing other holiday and lifestyle opportunities.

Ease of communication and ability to book auxiliary services such as good quality professional photographers and other related services can be influencing factors in choosing a destination.

**Cost**

Whilst it is commonly believed one of the attractions of holding an overseas wedding is the potential cost savings, more often than not this only applies to the wedding couple. For family and friends attending an overseas wedding can be an expensive, especially if a few of their contemporaries are choosing to have overseas weddings in close succession.

### WHAT SIZE ARE WEDDING GROUPS ?

Weddings can be simple ceremonies involving just a couple or major events with hundreds of guests. Figure 3 highlights the following about the size of outbound weddings globally:

- 39% of all wedding tourism from PICs source markets travels overseas as a couple. This mainly reflects long-haul wedding market travel patterns.
- 36% travel with a small group of family and friends up to 20 people, which reflects wedding travel for short haul markets
- Only 4% travel with wedding parties in excess of 100 people. This reflects mainly the Indian market travelling to Europe where there are large expatriate communities.

**Figure 3 | Global wedding group sizes outbound from key markets**

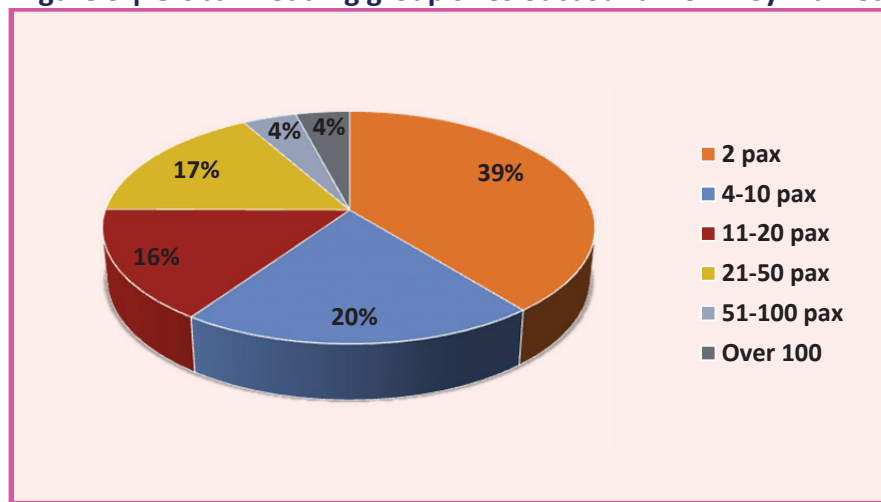
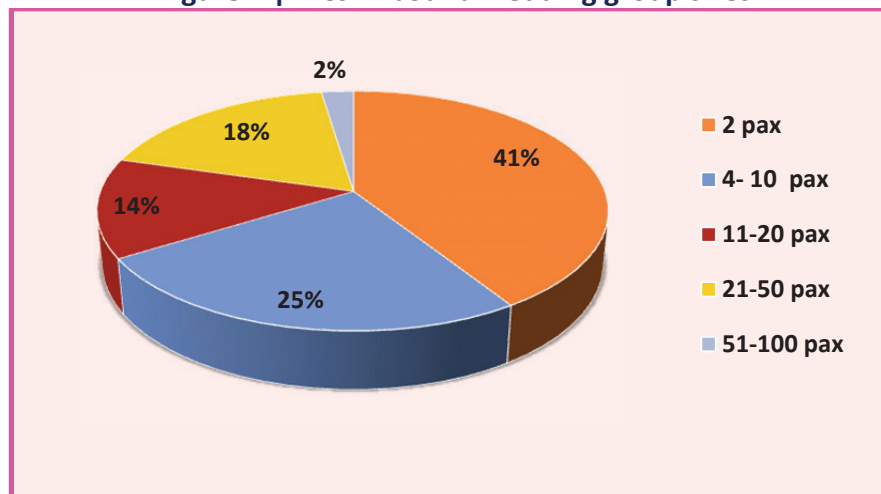


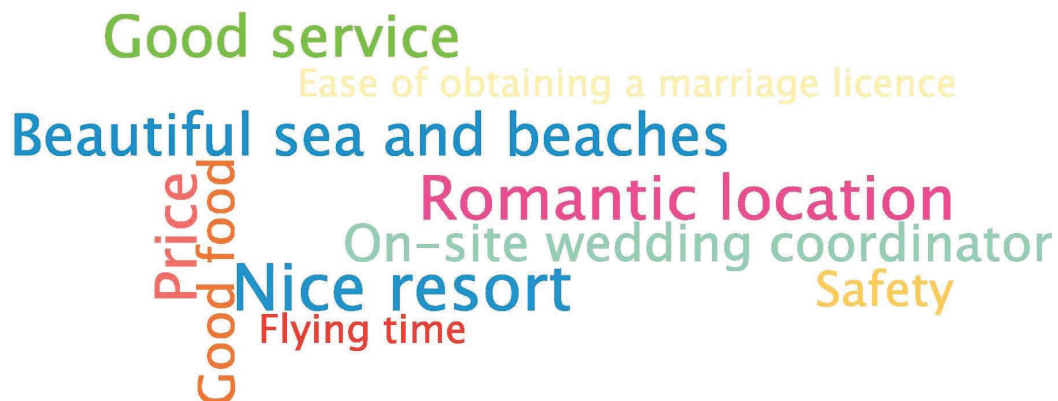
Figure 4 highlights the following about wedding group sizes into PICs from key source markets.

- 41% of all wedding tourism in PICs from source markets travel as a couple only. This mainly reflects long-haul global and medium-haul Asia wedding market travel patterns.
- 39% travel with a small group of family and friends up to 20 people, which reflects wedding travel for short haul markets dominated by Australia and NZ.
- 20% travel in larger groups, almost all from short haul source markets.

**Figure 4 | PICs inbound wedding group sizes**



## WHAT MATTERS TO WEDDING TOURISTS?

**Combined Global Wedding Tourist Market****Most Important**

- ☒ Nice Resort
- ☒ Romantic Location
- ☒ Price

**Less Important**

- ☒ Onsite wedding coordinator
- ☒ Flying time
- ☒ Marriage Licence

Source market operators pointed to physical attributes of having a nice place to stay and price, along with the emotional attribute of romantic location being most important to wedding clients.

The processes of getting to the destination and an on-site wedding co-ordinator were least important factors. The least important factor was the ease of obtaining a marriage licence. This is interesting, in that a number of PICs have strict conditions for marriages. It may be that this response was evoked due to operators being aware of these conditions.



Samoa. Photo courtesy Sinalei Reef Resort & Spa



## 5.2 CHARACTERISTICS OF GLOBAL HONEYMOON MARKET

Honeymoon tourism celebrates the marriage event and is more often focussed on romantic and other travel experiences that form part of an extended celebration.

Honeymoon tourism is an important segment for many PICs destination tourism operators. It has proven to be difficult to derive the exact numbers for the honeymoon tourism market. Our triangulation of research between source market operators and PICs based properties indicates that wedding and honeymoon tourism arrivals are somewhere between 15-20% of all holiday tourism arrivals into PICs.

Similar to international wedding tourism, honeymoon tourism falls into 2 main categories which characterise the global market.

### SHORT HAUL HONEYMOONS – ITS MORE ABOUT PRICE

<b>Ease of Access</b>	Affordable non-stop flight with duration of no more than 3-4 hours.
<b>Time Constraints</b>	Limited leave so prefer to maximise time away.
<b>Cost</b>	Price is often a driver, but also looking for value for money.
<b>Value Added</b>	Tends to be more important for short-haul honeymoons

### LONG HAUL HONEYMOONS – ITS MORE ABOUT DESTINATION

<b>Status Symbol</b>	Looking for new, less frequented exotic destinations. Social media also coming into play with Instagram and other photo sharing mediums.
<b>Experiential</b>	Looking to combine lying on the beach with experiential travel.
<b>Older Demographic</b>	Often older and perhaps on second marriage. Have time to travel further.
<b>Less Price Sensitive</b>	Price usually not a concern. Location is the overriding driver.

### Checkpoint on honeymoon tourism

*An important segment tourism operators, NTOs and tourism marketing agencies should not discount is the "second honeymoon" or "anniversary market" for couples wishing to celebrate their ongoing union. This opens up another demographic that is generally older, more financially secure and more able to travel internationally for longer periods.*

As with wedding tourism, there are key factors that influence couples decision about their final honeymoon destination choice.

**Not necessarily looking for “Fly and Flop”.**

The global honeymoon market is changing. Our research revealed that more honeymooners are looking for travel experiences beyond relaxing in a hammock or lying by the pool. This ties in with global reports, such as those produced by UNWTO and ITB that indicate tourism is moving towards a more experiential travel environment.

**Significant Celebration.**

Available data indicates that the vast majority of couples celebrate their marriage in their home country with family and friends.. The choice of an overseas honeymoon destination therefore takes on a special significance and factors such as location, services and facilities have a strong influence on the decision.

Recognition of the significance of the occasion by tourism operators, whilst not necessarily a decision attribute, does become an important part of the honeymoon experience.

**Marketing and the Destination Decision.**

Marketing plays an important role in the honeymoon segment. There are often strong branding linkages between wedding promotional efforts such as bridal fairs, dresses, wedding venues and planning and honeymoon promotions. According to leading wedding and bridal publications across all major source markets for PICs, the bride is a driving influence in the honeymoon destination decision and may even have planned her honeymoon before being proposed to! A number of global honeymoon destinations recognise this through special offers for the bride such as “free” or “half price” meal deals.



*Fiji Islands. Photo courtesy SPTO / David Kirkland*

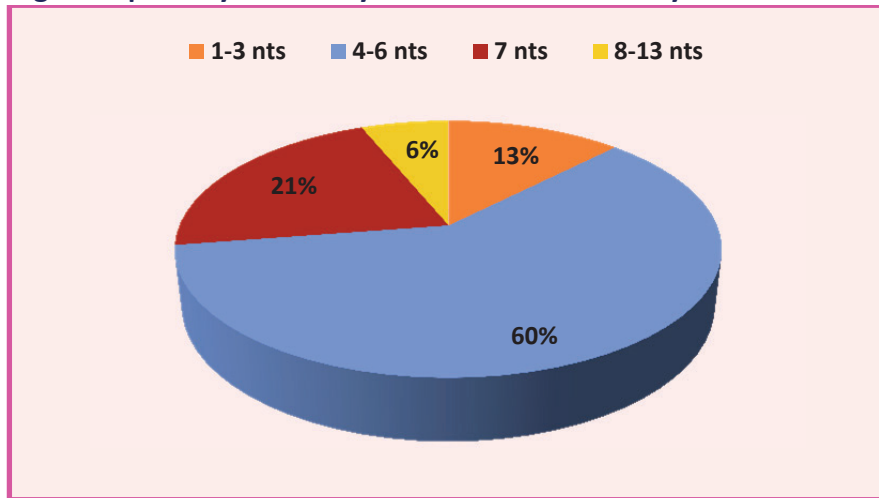
## HOW LONG DO HONEYMOONERS STAY?

The length of stay for honeymoon tourists can vary depending on source market characteristics. Figure 5 shows the breakdown by length of stay for PICs from all major source markets combined.

Key highlights include:

- Over 60% of all honeymoon tourists stay between 4-6 nights, reflecting time limitations from most markets and an increasing trend for honeymoons to stay at multiple locations/properties within a destination during their honeymoon.
- Only 6 % of honeymooners stayed longer than 8 nights at any one property.

**Figure 5 | Honeymoon stays at resorts from all key source markets**



## WHAT MATTERS TO HONEYMOON TOURISTS?



### Combined global honeymoon tourists

#### Most Important

- ☒ Honeymoon Benefits
- ☒ Beautiful Sea and Beaches
- ☒ Romantic location

#### Less Important

- ☒ Good Food
- ☒ Nice Resort
- ☒ Flying time

Overall, the important factors favoured physical attributes of the location and the resort.

Compared to all listed attributes, flying time, safety and security in PICs, and good food were not as critical in selecting honeymoon destinations.

### 5.3 GLOBAL WEDDING & HONEYMOON BOOKING & TRAVEL BEHAVIOUR

Understanding booking and travel behaviour for wedding and honeymoon PICs operators is beneficial on many fronts. It helps with planning marketing and promotional activities. But it also provides insights into positioning product in different global markets and when to push for sales. Global patterns fall into distinct peak booking and travel periods as shown in Figure 6.

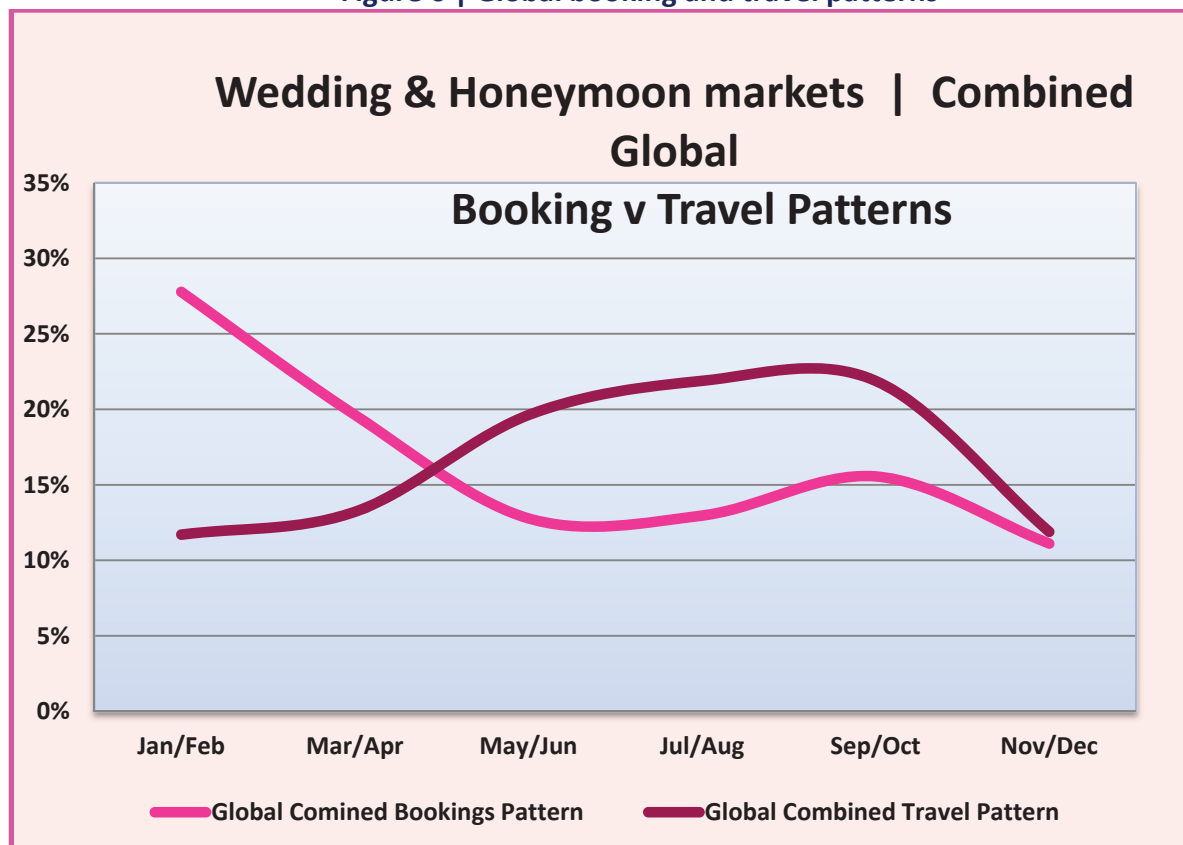
#### Peak Booking Period – January to April.

Globally, the peak booking period for PICs is from early-January through to late-March/early-April. This period represents around 48% of all bookings made for travel during regular calendar year. There is a smaller peak in September/October (16% of annual bookings) which is due seasonality, mainly in Australia and NZ.

#### Peak Travel Period – May through to October.

For the wedding and honeymoon market, travel periods are more evenly spread. Around 63% travel between May and October; whilst the monsoonal season for many PICs destinations, between November and February sees only 24% of annual wedding and honeymoon tourists travelling.

Figure 6 | Global booking and travel patterns





## 5.4 WEDDINGS AND HONEYMOONS SOURCE MARKET CHARACTERISTICS

### AUSTRALIA

#### Market Overview

Australia is a major source market for tourism into most PICs. Around 11% of Australians who holiday in member countries can be identified as wedding and honeymoon tourists.

Australians have reasonable awareness of most PICs destinations for weddings and honeymoons. Interest in wedding tourism from Australia has been increasing, although feedback from the trade indicates service levels remain a challenge.

Most clients who have their wedding in PICs look to choose a main island resort for their ceremony with family and friends and move off shore to an outer island for their honeymoon, which becomes an add on to their wedding.

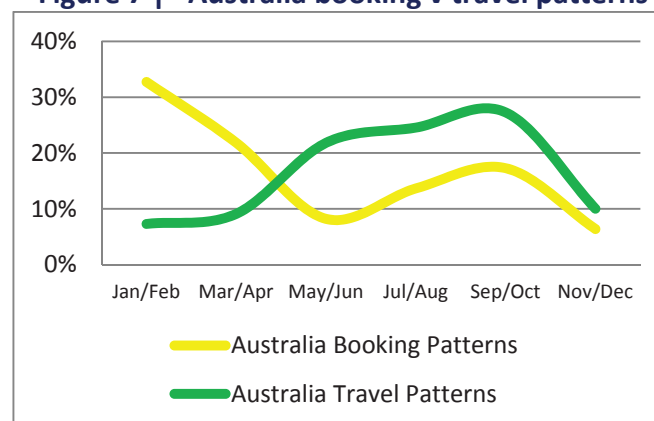
#### Australian Wedding and Honeymoon Booking & Travel Behaviour

Figure 7 outlines the booking and travel behaviour for the Australian market

Around 55% of Australian wedding and honeymoon bookings are made between early-January and late-march/early-April. End of summer and travel promotional sales that are driven mainly by major chains such as Flight Centre during February.

Travel dates tend to be more evenly spread with more favourable weather months to visit PICs, between May and October being the most popular. This period accounts for about 75% of travel from the Australian market.

**Figure 7 | Australia booking v travel patterns**



#### Where Do Australians Travel for Their Weddings and Honeymoons?

The most popular overseas wedding and honeymoon destinations are Thailand, Bali, Hawaii and Fiji.

Reasons for this include a combination of:

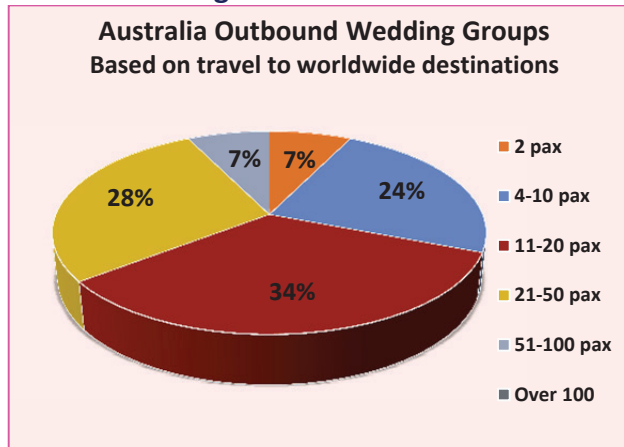
- ✓ Price
- ✓ Ease of access
- ✓ Quality of product and services

## AUSTRALIAN WEDDING TOURISM CHARACTERISTICS

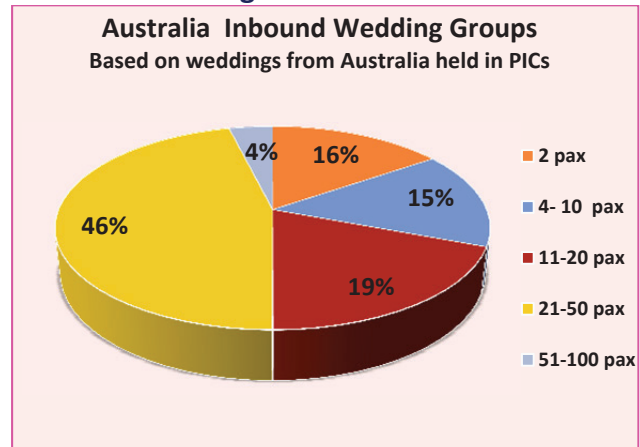
### Australian Wedding Group Sizes

Outbound results for Australia indicate around 58% of all overseas weddings from Australia are small groups of 4-20 family and friends. Given the proximity of Australia to PICs countries groups are generally larger, with 46% being groups of 21-50 guests. Figures 8 and 9 compare Australian wedding groups globally with those to PICs.

**Figure 8 - Outbound**



**Figure 9 - Inbound**



## What Matters to the Australian Wedding Market?

### Australian Wedding Tourists

#### Most Important

- ☒ Romantic Location
- ☒ Nice Resort
- ☒ Beautiful Sea and Beaches

#### Less Important

- ☒ Onsite wedding coordinator
- ☒ Flying time
- ☒ Marriage Licence

Australians regard the physical attributes of destination and resort as key factors for their wedding venue.

The processes of getting to the destination, marriage licence at the destination and total price of wedding package were least important factors.

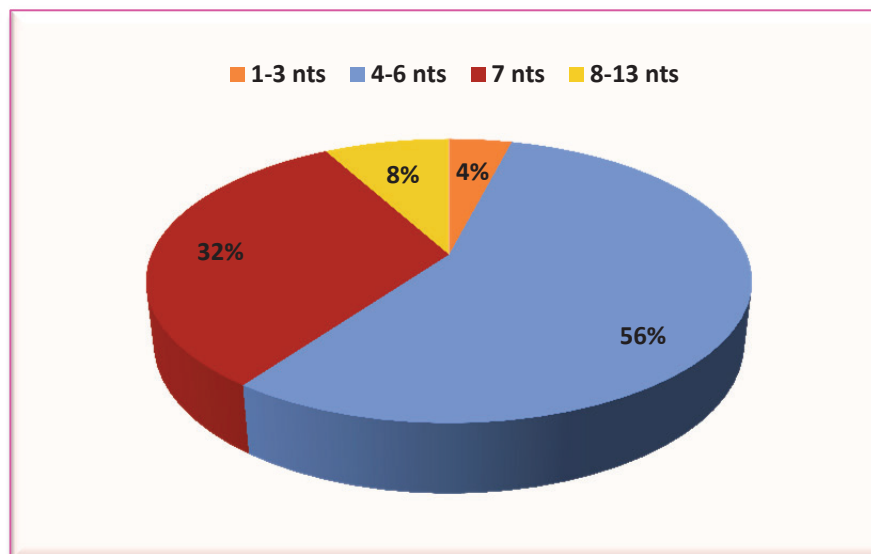
## AUSTRALIAN HONEYMOON TOURISM CHARACTERISTICS

### How Much do Australian Honeymooners Spend and How Long do They Stay?

Australians spend an average of A\$5,600 per couple for airfares and accommodation and stay 7-10 nights away for their PICs honeymoon. Around 56% of stays will spend time in more than one property, where they will stay 4-6 nights. Examples of this include Fiji, where time will be split between an island resort and Viti Levu or in The Cook Islands where they may visit Rarotonga and Aitutaki. 40% will generally stay at one destination for more than 7 nights.

Figure 8 highlights the breakdown of how long Australians stay at PICS destination properties.

**Figure 10 - Australian honeymoon stays**



### What Matters to the Australian Honeymoon Market?

#### Australian Honeymoon Tourists

##### Most Important

- ☒ Romantic Location
- ☒ Nice Resort
- ☒ Honeymoon Benefits

##### Less Important

- ☒ Good Food
- ☒ Beautiful Sea and Beaches
- ☒ Flying time

For Australian honeymooners, the setting of resort as well as resort features and getting recognition as honeymooners through special benefits was more important. Nice resort does not have to be a 5-star resort. A 2-star resort can be as equally as nice as a 5-star resort.

Australians rated safety and security of destination in PICs, relative importance of having good quality food and flying time to destination as least important for their honeymoon.

## NEW ZEALAND

### Market Overview

NZ is a major source market for tourism into most PICs. Around 14% of New Zealanders who holiday in member countries can be identified as wedding and honeymoon tourists. This represents a significant portion of the outbound NZ wedding and honeymoon market.

New Zealanders have strong awareness of PICs for weddings and honeymoons. Wedding tourism from NZ is trending towards smaller groups, as many friends of the bridal party cannot afford frequent trips for overseas weddings. They will look for value for money over price and the growing number of adult only properties that encompass spa-villa concepts in PICs are becoming increasingly popular.

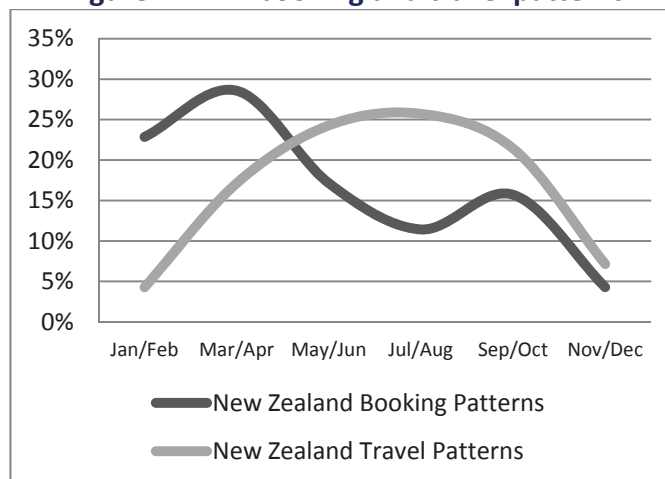
### NZ Wedding and Honeymoon Booking and Travel Behaviour

Figure 11 outlines the booking and travel behaviour for the NZ market

Around 51% of NZ wedding and honeymoon bookings are made between early-January and April. Purchasing behaviour that is driven by end of summer sales and travel promotions.

Travel dates peak during July/August with around 90% of New Zealanders have their overseas wedding or honeymoon between April and October. This travel is mostly driven by the NZ winter and more favourable weather in the South Pacific. It is not uncommon for New Zealanders who are married at home in the summer months to delay their honeymoon until the NZ autumn or winter.

**Figure 11 - NZ booking and travel patterns**



### Where do New Zealanders Travel for Their Weddings and Honeymoons?

With almost 75% of New Zealanders holding a passport, many will take at least their honeymoon, overseas. Australia is probably the most popular wedding and honeymoon destination from NZ, through volume of travellers alone. The most front-of-mind overseas wedding and honeymoon destinations are The Cook Islands, Fiji, Hawaii and Samoa.

Reasons for this include a combination of:

- ✓ Value for Money
- ✓ Ease of access
- ✓ Favourable climate



Cook Islands. Photo courtesy The Rarotongan Beach Resort & Spa

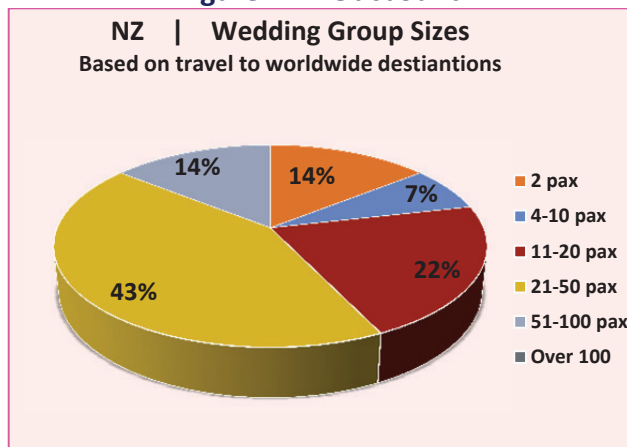
## NEW ZEALAND WEDDING TOURISM CHARACTERISTICS

### NZ Wedding Group Sizes

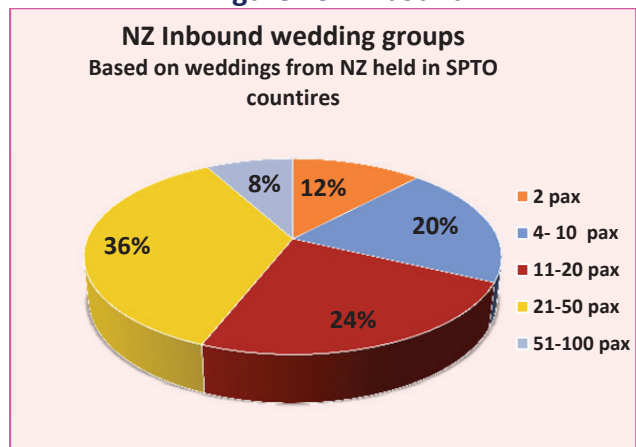
Outbound results for NZ indicate around 65% of all overseas weddings are groups of 11-50 family and friends, whilst weddings to PICs reflect 60% of weddings are for a similar number of guests. Proximity to major PICs wedding destinations such as the Cook Islands and Fiji allows for short break travel by guests attending weddings. This perhaps explains the propensity for larger wedding groups, although this is trending down.

Figures 12 and 13 compare NZ wedding groups globally with those to PICs.

**Figure 12 – Outbound**



**Figure 13 - Inbound**



### What Matters to the NZ Wedding Market?

#### NZ Wedding Tourists

##### Most Important

- ☒ Price
- ☒ Marriage Licence
- ☒ Onsite wedding coordinator

##### Less Important

- ☒ Flying time
- ☒ Safety
- ☒ Food

New Zealanders rated price, nice hotel and resort and the availability of online wedding co-ordinator as important attributes. The physical locale was not deemed as important. Nice hotel and resort does not relate to star rating; a 3 star properties can be just as nice as a 5 star or an island resort can be just as nice as a large property.

Least among New Zealanders' consideration were flying times to destination, safety and security of PICs and quality of food.

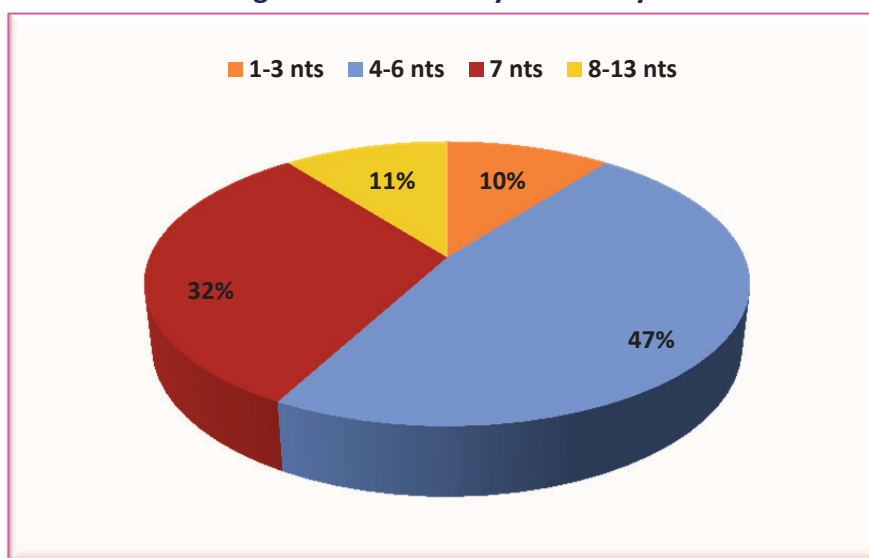
### NEW ZEALAND HONEYMOON TOURISM CHARACTERISTICS

#### How Much do NZ Honeymooners Spend and How Long do They Stay?

New Zealanders spend an average of NZ\$3,600 per couple for airfares and accommodation and stay 6-8 nights away for their PICs honeymoon. Around 47% of stays will spend time in more than one property, where they will stay 4-6 nights. 43% will generally stay at one destination for more than 7 nights.

Figure 14 highlights the breakdown of how long New Zealanders stay at PICs properties.

**Figure 14 - NZ Honeymoon Stays**





What Matters to the NZ Honeymoon Market?

NZ Honeymoon Tourists	
<b>Most Important</b> <ul style="list-style-type: none"><li>☑ Romantic location</li><li>☑ Nice Resort</li><li>☑ Honeymoon benefits</li></ul>	<p>Honeymooners rated physical destination attributes and hotel attributes highly relative to other attributes.</p> <p>Comparatively least likely factors for honeymooners were relative quality of food, safety and security issues and flying time to destination.</p>
<b>Less Important</b> <ul style="list-style-type: none"><li>☒ Good Food</li><li>☒ Safety</li><li>☒ Flying time</li></ul>	



Solomon Islands. Photo courtesy Solomon Islands Visitors Bureau / David Kirkland

## NORTH AMERICA

### Market Overview

15% of Canadians and 39% of Americans (14% excluding French Polynesia) who holiday in PICs can be identified as wedding and honeymoon tourists. The relative high figure for Americans reflects the popularity of French Polynesia (especially Bora Bora, as a honeymoon destination) where more than 50,000 Americans visit each year. It is worth noting that departures from USA to PICs represent less than 0.5% of resident departures overseas.

With the exception of French Polynesia, North American trade and consumers have relatively little awareness of most PICs for weddings and honeymoons. Overseas weddings and honeymoons will generally be closer to home where there is frequent and direct flight access. Limited annual leave (2 weeks Canada and 1 week USA) strongly influences destination options and decisions.

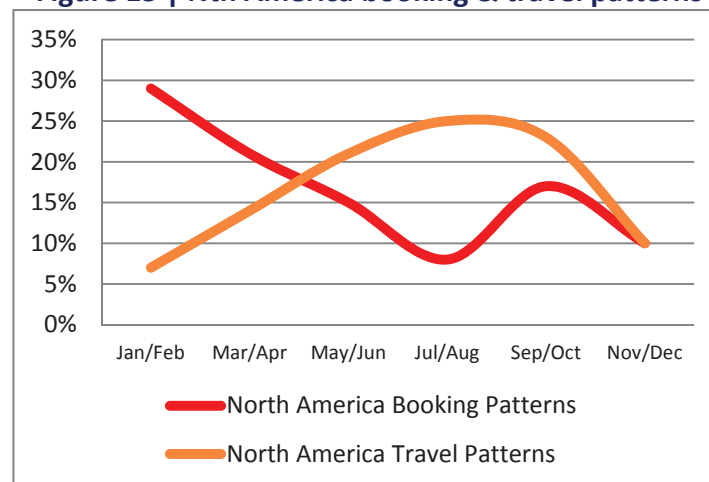
With only Fiji and French Polynesia offering daily direct flights, PICs will continue to struggle to compete with destinations where there is fierce competition driving price and perceived value.

### North American Wedding and Honeymoon Booking and Travel Behaviour

Figure 15 outlines the booking and travel behaviour for the North American market.

Around 50% of North American wedding and honeymoon bookings are made between early-January and April. This pattern is due to wider the economic and social environment. People traditionally take holidays during summer and book their trips in the early part of the year. Travel dates are a little more spread with 69% of North Americans having their overseas wedding or honeymoon between April and October.

**Figure 15 | Nth America booking & travel patterns**



### Where do North Americans Travel for Their Weddings and Honeymoons?

Canadians are proportionately more likely to travel overseas for their honeymoons, however all North Americans share the same most popular destinations. Mexico, Caribbean and Hawaii are by far the most popular. French Polynesia (especially Bora Bora) ranks as one of the most desirable, although practicalities ensure others receive a much greater number of visitors.

Reasons for this include a combination of:

- ✓ Value for money. Mexican and the Caribbean offer well priced all inclusive packages.
- ✓ Ease of access – direct flights from many cities across North America.
- ✓ Time limitations – travel to the South Pacific will consume 2-3 days of holiday time.

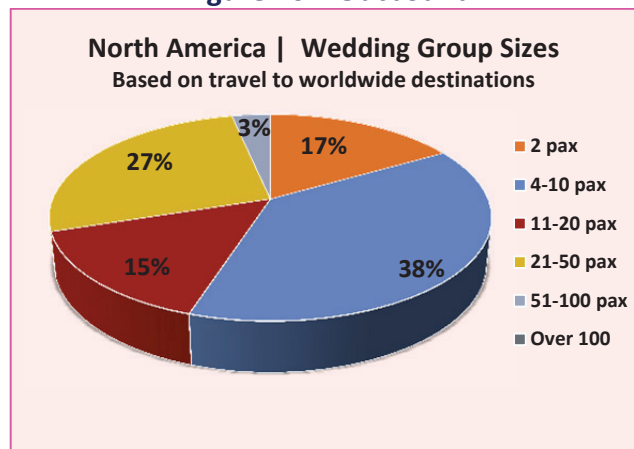
### NORTH AMERICAN WEDDING TOURISM CHARACTERISTICS

#### North American Wedding Group Sizes

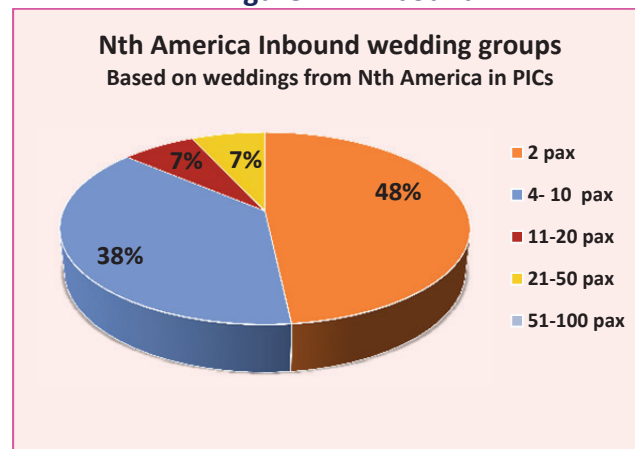
Outbound results for North America indicate around 53% of all overseas weddings are small groups of 4-20. A further 27% will travel in larger groups of 21-50. This reflects travel to Mexico and the Caribbean where product is tailored for group weddings. Direct flights also make it relatively inexpensive for family and friends to take a long weekend to attend weddings. Weddings into PICs present a quite different picture where almost half (48%) are just the couple. Many wedding couples from North America who choose PICs are looking for a quieter, more romantic and personal environment.

Figures 16 and 17 compare North American wedding groups globally with those to PICs.

**Figure 16 – Outbound**



**Figure 17 - Inbound**



### What Matters to the North America Wedding Market?

#### North American Wedding Tourists

##### Most Important

- ☒ Nice Resort
- ☒ Romantic Location
- ☒ Price

North Americans rated resort attributes and physical location as important together with wedding prices. Ease of obtaining marriage licence came a close fourth and is worth mentioning.

##### Less Important

- ☒ Good food
- ☒ Onsite wedding coordinator
- ☒ Flying time

Least important attributes were the relative quality of food, availability of onsite wedding co-ordinator and flying time for wedding occasion.

## NORTH AMERICAN HONEYMOON TOURISM CHARACTERISTICS

### How Much do They Spend and How Long do They Stay?

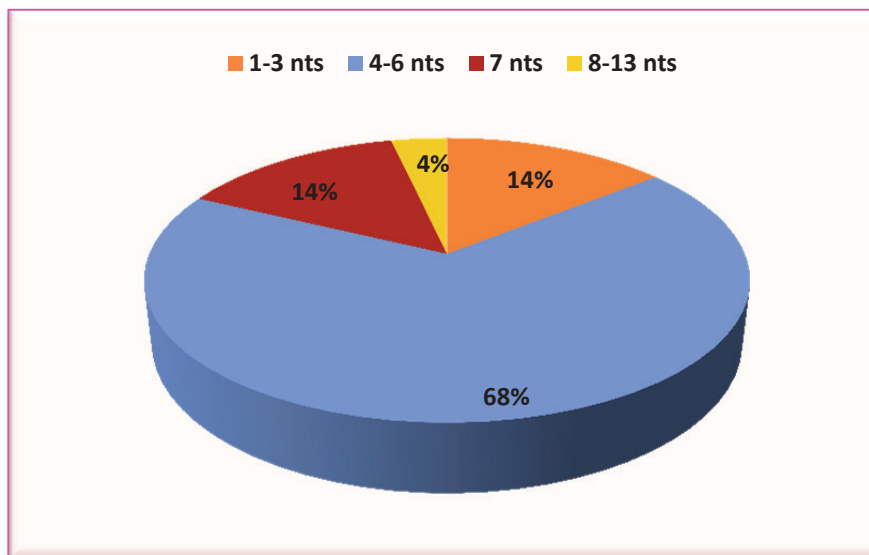
Canadians spend an average of CA\$7200 per couple for airfares and accommodation and stay 10-13 nights away for their PICs honeymoon.

Americans spend an average of US\$7240 per couple for airfares and accommodation and stay 8-11 nights away for their PICs honeymoon.

Around 68% of stays will spend time in more than one property, indicating North American honeymoons to PICs include island hopping. The strong French Polynesia market generally includes multi-island stays (namely Tahiti and Bora Bora)

Figure 18 highlights the breakdown of how long North Americans stay at PICS properties.

**Figure 18 North American honeymoon stays**



### What Matters to the North America Honeymoon Market?

#### North American Honeymoon Tourists

##### Most Important

- ☒ Romantic Location
- ☒ Nice Resort
- ☒ Beautiful Sea and Beaches

##### Less Important

- ☒ Safety
- ☒ Good Food
- ☒ Flying time

North American operators said honeymooners rated romantic location, nice resorts and beach setting as important. It is also worth mentioning that price and good service by resorts were rated equally and very closely followed beach settings. Most other countries did not rate price as a very strong factor for honeymoon destinations!

Least important for PICs were safety and security issues, relative quality of food and flying time to their dream honeymoon destination.

## UK/EUROPE

### Market Overview

34% of holiday visitors to PICs from UK/Europe (11% excluding French Polynesia) can be identified as wedding and honeymoon tourists. The relatively high figure reflects a high number of clients for French Polynesia where more than 55,000 Europeans visit each year. Many UK/Europe visitors to PICs are stopping over en-route Australia and/or NZ.

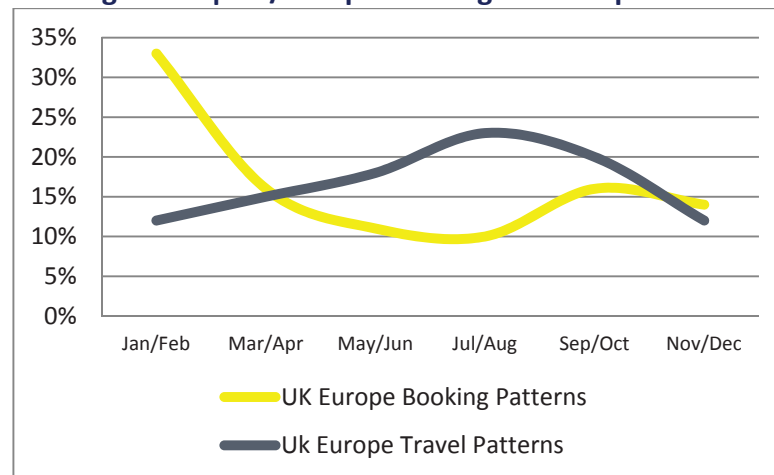
With exception of French Polynesia, UK/Europe trade and consumers have little awareness of most PICs for weddings and honeymoons. UK/Europe will travel medium-long haul for overseas weddings and honeymoons, however they prefer destinations with direct flight access. Only France, with daily flights to French Polynesia has one-stop same plane access to PICs.

### UK/Europe Wedding and Honeymoon Booking and Travel Behaviour

Figure 19 outlines the booking and travel behaviour for the UK/Europe market

Around a third of UK/Europe wedding and honeymoon bookings are made in January and February. This pattern is due to wider the economic and social environment. People traditionally take holidays during the northern summer and book their trips in the early part of the year. UK/Europe clients are tending to book with less lead times, from a previous long haul pattern of 6-9 months ahead, down to 3-6 months and this has seen a more even spread of booking patterns. Travel dates also tend to be more evenly spread with around 23% taking their overseas wedding or honeymoon in July/August.

**Figure 19 | UK/Europe booking & travel patterns**



### Where do UK/Europe Travel for Their Weddings and Honeymoons?

UK/Europe wedding and honeymoon destinations vary dependant on country of origin. Generally speaking Mediterranean destinations feature as the most popular, whilst the most prominent medium-long haul include Indian Ocean Islands (Maldives, Seychelles, Mauritius), Thailand and Caribbean. PICs destinations represent a very small percentage of honeymoon travel, which is mainly to French Polynesia. There is relatively insignificant wedding travel due to cost and distance.

Reasons for travel to the more prominent destinations include:

- ✓ Price and value for money.
- ✓ Ease of access – direct flights from many European cities to these destinations
- ✓ Time limitations – travel to the South Pacific will consume 3-4 days holiday time.

## UK/EUROPE WEDDING TOURISM CHARACTERISTICS

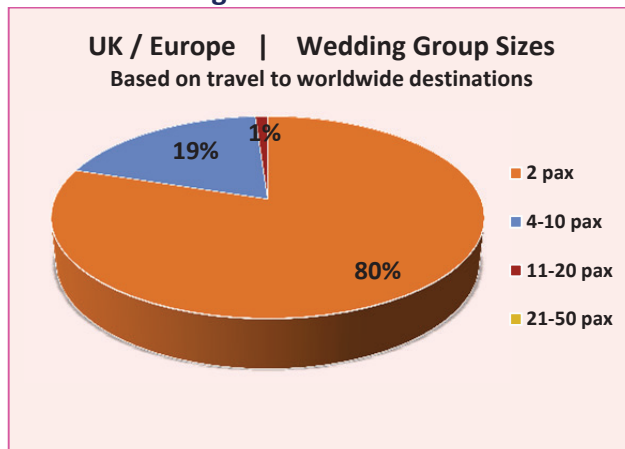
### UK/Europe Wedding Group Sizes

Outbound results for UK/Europe indicate around 80% of all overseas weddings are just the couple. This reflects the following:

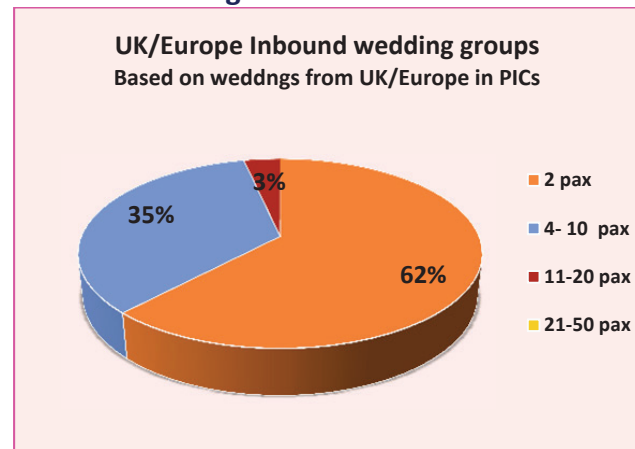
- Short-haul destinations preferred for group weddings due to cost and convenience.
- Overseas wedding tourists from UK/Europe tend to be couples looking for a quiet wedding or second marriages where there is little desire for a major wedding event
- Economic conditions in many European countries make group weddings overseas less affordable.

Figures 20 and 21 compare UK/Europe wedding groups globally with those to PICs.

**Figure 20 – Outbound**



**Figure 21 - Inbound**



## What Matters to the UK/Europe Wedding Market?

### UK/Europe Wedding Tourists

#### Most Important

- ☒ Beautiful Sea and Beaches
- ☒ Romantic Location
- ☒ Nice Resort

#### Less Important

- ☒ Onsite wedding coordinator
- ☒ Flying time
- ☒ Marriage Licence

UK/Europe operators said clients rated attributes associated with dream tropical destinations (beautiful sand and beaches, romantic location and resort quality) as their top wedding attributes.

Relatively least important attributes were having a wedding co-ordinator, processes associated with marriage licence and flying time. The latter, in the context of having once in a lifetime occasion and given that mainly only couples travel for weddings makes sense.



## UK/EUROPE HONEYMOON TOURISM CHARACTERISTICS

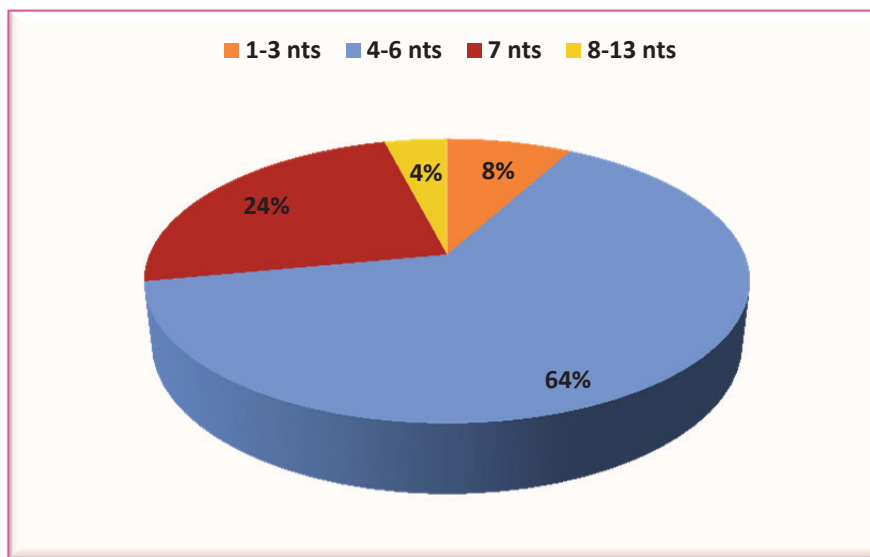
### How Much do UK/Europe Honeymooners Spend and How Long do They Stay?

Europeans spend an average of Euros 11,300 per couple (GBP 9,500 for UK) for airfares and accommodation and stay 14-20 nights away for their PICs honeymoon.

Around 72% of stays will spend time in more than one property, indicating UK/European honeymoons into PICs island hop. This also signifies a trend for more experiential honeymoon travel from UK/Europe. Whilst the romantic elements predominate, they are also seeking nature, adventure and cultural experiences during their PICs honeymoon.

Figure 22 highlights the breakdown of how long UK/Europeans stay at PICs properties.

Figure 22 - UK/Europe honeymoon stays



### What Matters to the UK/Europe Honeymoon Market?

#### UK/Europe Honeymoon Tourists

##### Most Important

- ☒ Romantic Location
- ☒ Beautiful Sea and Beaches
- ☒ Nice Resort

##### Less Important

- ☒ Safety
- ☒ Good Food
- ☒ Flying time

Important attributes mirror exactly the same as weddings for UK/Europe travellers.

Of lesser importance are relative safety and security in Pacific Islands, relative importance of good meals and flying time to their dream honeymoon destination.

## ASIA

### Market Overview

The main focus on the Asian region are the emerging markets of China and India and the established markets of Japan and South Korea into most PICs.

China is one of the major global outbound growth markets. Still relatively small in numbers, around 30,000 Chinese visited PICs in 2013. Chinese honeymooners are in search of unique honeymoon destinations, where focus is more on prestige rather than place.

Indian wedding and honeymooners seeking international destinations is in the ascendancy with most following trends set by film and fashion stars. Flight timing and airline connectivity is key issue for Indian travellers to PICs.

Japanese weddings and honeymoon travel is generally restricted to the closer PICs in the Northern Pacific with relatively smaller numbers elsewhere.

South Korea's wedding and honeymoon pattern mirrors that of the Japanese market.

### Asia Wedding and Honeymoon Booking and Travel Behaviour

Wedding and honeymoon booking and travel behaviour is quite different in Asia to other global markets. Booking and travel behaviour is influenced by:

#### Culture

China – Chinese New Year and Golden week are key holiday periods for Chinese to travel

India – Most couples will marry or take honeymoons until after Diwali in Oct or Nov.

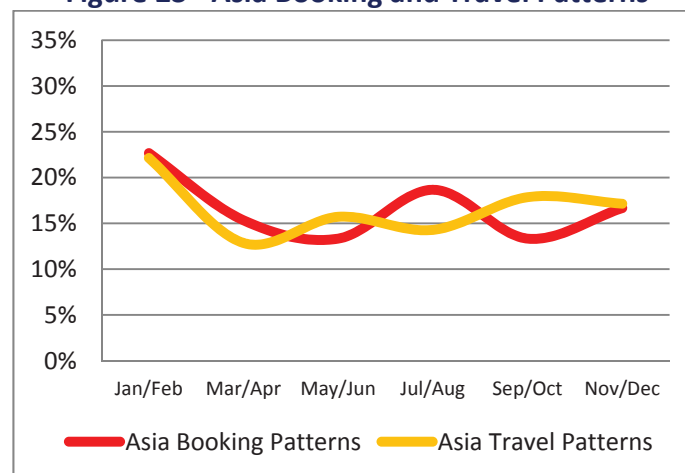
Japan – Golden Week (April/May); Obon (August); New Year (late-Dec to mid-Jan).

Korea - Key travel months are July, August and November to March.

#### Economic and workplace environment

Most Asian countries only have limited annual leave – generally one week outside holiday periods and leave is often only approved a few weeks in advance. For these reasons, with the exception of the January/February holiday season (23% of bookings and 22% of travel) booking and travel patterns tend follow cyclical pattern as highlighted in Figure 23.

**Figure 23 - Asia Booking and Travel Patterns**



### Where do Asians Travel for Their Weddings and Honeymoons?

Asian wedding and honeymoon destinations vary dependant on country of origin. Generally speaking the most popular overseas destinations are Thailand, Hawaii, Bali, Maldives and Guam.

Reasons for travel to the more prominent destinations include:

- ✓ Price and value for money.
- ✓ Ease of access – direct flights from many Asian cities to these destinations
- ✓ Time limitations – due to leave allowances.

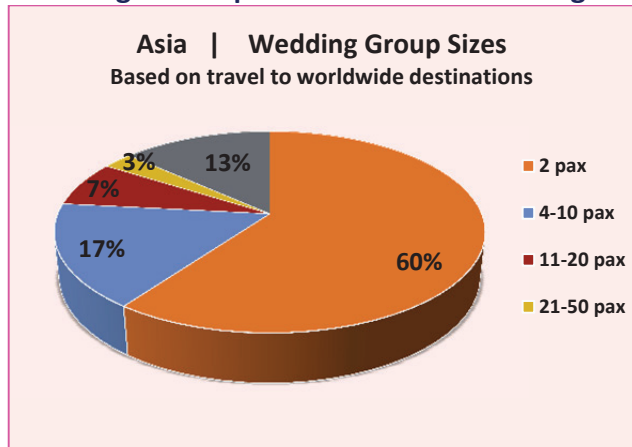
### ASIA WEDDING TOURISM CHARACTERISTICS

#### Asia Wedding Group Sizes

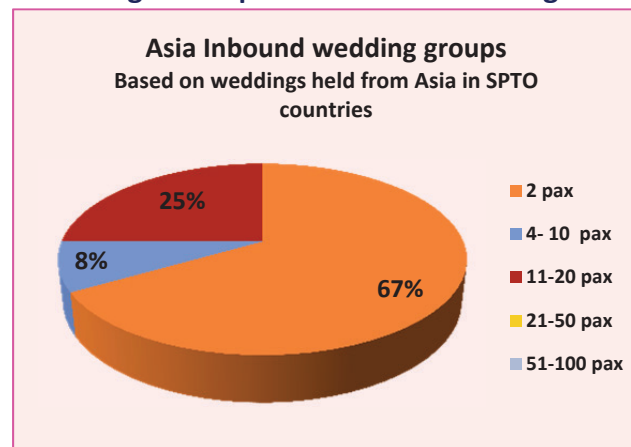
Around 60% of all overseas weddings globally from Asia are just the couple.

Asian wedding tourists tend to be in search of places that offer a clean environment, privacy and that have been frequented by popular opinion leaders (celebrities) There is also a strong desire to search Indian wedding tourists also look for destinations with a range of vegetarian meal options. There is a very strong desire by Chinese and Indian travellers in particular to search for new exotic destinations for weddings. Figures 24 and 25 illustrate Asian wedding group sizes. PICs results are based on small numbers of arrivals and probably reflect weddings with parents and close family in some cases.

**Figure 24 | Outbound Asia Weddings**



**Figure 25 | Inbound Asia Weddings**



### What Matters to the Asia Wedding Market

#### Asia Wedding Tourists

##### Most Important

- ☒ Nice Resort
- ☒ Service
- ☒ Price

##### Less Important

- ☒ Flying time
- ☒ Onsite wedding coordinator
- ☒ Marriage Licence

Asia operators indicate wedding clients rate quality of resorts, the service standards of resorts (does not necessarily equate to star rating) and price as important attributes when selecting wedding destinations.

Relative flying time and availability of onsite wedding co-ordinator were seen as least important attributes. Marriage licence at the destination was seen as least important factor by a significant contrast.

## ASIA HONEYMOON TOURISM CHARACTERISTICS

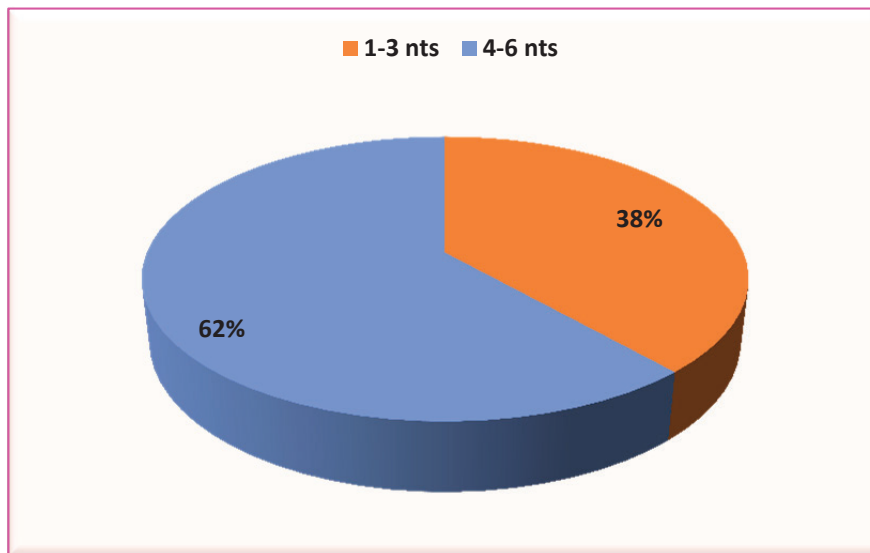
### How Much do Asian Honeymooners Spend and How Long do They Stay?

Spend varies from country to country but on an average honeymooners from Asia spend around USD 5,700 per couple for airfares and accommodation and stay 3-5 nights away for their Pacific honeymoon.

Around 38% of stays will spend time in more than one property or only take short break honeymoons, whilst 62% will stay at one destination for their honeymoon for 4-6 nights. None will tend to stay longer than 6 nights.

Figure 26 highlights the breakdown of how long Asians stay at PICs destination properties.

**Figure 26 - Asia Honeymoon Stays**



### What Matters to the Asia Honeymoon Market?

#### Asia Honeymoon Tourists

##### Most Important

- ☒ Nice Resort
- ☒ Romantic Location
- ☒ Honeymoon Benefits

##### Less Important

- ☒ Safety
- ☒ Good Food
- ☒ Flying time

Asian operators said honeymooners rated locale of resorts as well as resort characteristics as important. Relative to most other markets there is a much greater emphasis placed on being recognised as honeymooners and accorded honeymoon benefits.

Relative quality of food, safety and security and flying times for honeymoon were seen as least important attributes. Notable exception was India where the market expressed concern that tasty and healthy vegetarian options were not adequate compared to competing destinations.

## SOUTH AMERICA

South America is considered an emerging long-haul market for PICs. There is air access via North American, NZ and Australian gateways, plus a weekly service between Chile and Tahiti.

Due to limited feedback, the following is a brief summary.

### Market Overview

The economies of many South American countries have grown rapidly since the 1990's with the advent of significant economic reform across the continent. Along with countries such as China, South America has seen strong double digit growth in outbound tourism.

South Americans are increasingly looking more long haul destinations for their honeymoons in particular.

Popular wedding and honeymoon destinations include Mexico, Caribbean (especially Dominican Republic) and Iberian and Mediterranean Europe.

The weddings group market tends to be short to medium haul with a small number of couples venturing to PICs.

Honeymoons to PICs are usually for around 6-7 days at a spend of around US\$12,000 per couple including airfares and accommodation. This would indicate a higher socio economic demographic will honeymoon in PICs.



*Fiji Islands. Photo courtesy Outrigger Fiji Beach Resort.*

## 6 FORECASTED TRAVEL TRENDS

In this section we discuss:

- Global travel trends
- Wedding and honeymoon tourism trends
- What's driving travel trends and what the next trends may be

### 6.1 GLOBAL TRAVEL TRENDS

Each year major travel exposition company, Messe Berlin, operators of ITB Berlin and Singapore, conduct a study (through IPK Consulting) and host a forum on the trends in tourism. UNWTO and London based WTM conduct similar research and forums.

According to IPK's 2014 World Travel Monitor forum <sup>4</sup>global tourism grew by 4.5% in the first 8 months of 2014 and is set to maintain similar growth in 2015 and beyond. UNWTO forecasts growth for over 3.3% per annum for the next 15 years, with arrivals in emerging destinations growing at twice the rate (4.4%) of those in advanced economies (2.2%) <sup>5</sup>.

Other trends noted by these organisations include:

- **People will take shorter trips**  
The changing working environment means more frequent trips for less duration. This is being reflected in the growth of short-haul tourism.
- **People will spend more on travel**  
Being time poor they are looking for specific experiences and relaxation and will pay for it. Spending on travel has grown 6% per annum since 2013<sup>6</sup>.
- **More individual holiday experiences**  
In line with our research, there is an increasing drop off in fly-and-flop tourists, with more looking to include more experiences.
- **Matching pricing and value for money with image and dream**  
Whilst price remains a motivator, value for money that is seen to be matching the image and dream will generally take precedence.
- **Technology continues to exert influence over behaviour**  
According to World Travel Monitor <sup>®</sup>, in 2014 70% of holiday makers globally booked their travel via the internet, representing a 7% annual increase. The report also indicates travel agent bookings are stabilising at 24% of holidays booked.
- **South America, Asia and USA economy driving global travel growth**  
The emerging source markets of South America (Chile, Argentina and Brazil) and Asia (namely China and India) currently provide low volumes of wedding and honeymoon clients for PICs, however they are amongst the leading economic growth nations in the world and outbound travel continues to rise ahead of global rates. A resurgent USA economy is also driving global travel growth.

<sup>4</sup> Forum hosted by IPK Consulting in Italy, October 2014.

<sup>5</sup> UNWTO Tourism Highlights, 2014 Edition

<sup>6</sup> World Travel Monitor, IPK Consulting, 2014



## 6.2 WEDDING AND HONEYMOON MARKET TRENDS

Research has identified the following trends based on source markets:

### **Australia**

- Growth in couples including their honeymoon as part of their wedding registry list
- Increase in internet searching and DIY honeymoons and weddings
- “Gate Keeping” role has shifted from travel agents to consumer
- Second marriages tend to honeymooning in more exotic locations

### **New Zealand**

- Offshore weddings losing the surprise factor as have become more the norm, although remain attractive due to better pricing for bridal couples’ family
- Looking for more inclusive wedding products
- More PICs resorts becoming proactive in wedding market
- Wedding and honeymoon booking profile is significantly longer than FIT – can be 7 months

### **North America**

#### **Canada**

- Social media having greater impact on decisions
- Wedding Expos still playing a role

#### **United States**

- Clients are using social media to research and interact with operators before booking
- Visible shift to shorter lead times for honeymoons
- More couples pre-booking experiential activities
- Instagram and other photo sharing and on-location photography
- Free connectivity such as Wi-Fi becoming an expected norm
- Digital and word of mouth referrals much more influential

### **UK/Europe**

- Increased interest and awareness in PICs
- Increase in older couples doing renewal of vows overseas
- Continued increase in price sensitivity due to the internet
- People wanting to find new destinations that are further afield
- Lead times are decreasing and booking patterns more steady
- Looking for more spectacular, natural and cultural experiences

**Asia****India**

- Following where celebrities holiday
- Size of wedding party matters – usually large

**China**

- Privacy increasingly important and looking to travel where there are few other Chinese
- Increase in demand for overseas weddings – although generally only the couple
- Following where celebrities holiday
- Instant photos back to China via “wechat” (Wi-Fi connection important) and other forms of Chinese-based social media such as Renren, QQ and Weibo

**Japan**

- Demand for overseas weddings is declining due to gradual fall in rate of marriage and people getting married older.

**South Korea**

- Increase in wedding overseas, especially seeking glamorous chapel settings etc
- Honeymooners looking for inclusive meal plan options
- Increase in DIY honeymoons



*Kingdom of Tonga. Photo courtesy SPTO / David Kirkland*

### 6.3 WHAT IS DRIVING TRAVEL TRENDS?

❖ ***It's about bragging rights and status.***

In emerging markets such as India and China, where you travel for your wedding or honeymoon is more about status than the destination itself. Following in the footsteps of celebrities and instantly being able to send the pictures to prove it is very important.

In more established source markets finding a new, remote and even more romantic location is increasingly becoming important.

❖ ***Social Technology Effects.***

Live streaming your wedding to friends back home or Instagramming your honeymoon are becoming increasing trends across all source markets. This can strongly influence the importance placed on destination, quality of videographer or photographer and setting. Examples include:

- ✓ Apps for locating the best beaches, restaurants and other attractions
- ✓ Tours that include providing you with the perfect lagoon, beach or landmark backdrop for your Instagram pics
- ✓ Complimentary photo shoot built into the wedding package.

### 6.4 WHAT'S NEXT IN TRAVEL TRENDS?

➤ ***Sharing Economy Tourism Businesses***

This is a relatively new business model that is growing rapidly across the globe and changing how travel is being booked, especially in ground transport and accommodation. Technology platforms allowing people to register private accommodation and transport for rent directly to end consumers. By early 2015, one of the pioneering platforms is already offering 330,000 rooms in 154 countries.

➤ ***Personalised Luxury Travel***

Driven by an explosion in mobile connectivity and technology more and more tourism providers are meeting the increased personal demands of travellers, especially in segments such as weddings and honeymoons. Examples include:

- Properties featuring rooms that are differently styled and scented.
- Dining that feature gastronomic tasting experiences.

## 7 DISTRIBUTION CHANNELS & RECOMMENDATIONS

In this section we discuss:

- Distribution channels
- Source market distribution and trends
- Distribution recommendations for operators

### 7.1 DISTRIBUTION CHANNELS

There is no set definition of distribution channels in tourism. Most definitions centre on how a tourism product is made available to the customer and this aligns strongly with how the product is marketed.

Prior to the advent of the Internet, if you didn't sell through a distributor such as a wholesaler or specialist travel company, selling weddings and honeymoons directly to the customer was mostly limited to specialist magazine advertisements, trade fairs and expos and word-of-mouth. For weddings and honeymoon tourism these traditional forms of distribution remain very important. However, the internet has changed distribution substantially.

For operators in PICs wedding and honeymoon industry distribution is increasingly via online channels, but there are still a myriad of opportunities for this to increase. The main forms of distribution currently being utilised by wedding and honeymoon operators are

1. Direct enquiries via own website
2. Overseas wholesale and specialist travel companies
3. Social media
4. Client referrals

More traditional channels such as overseas travel companies are being less relied upon, as direct online distribution takes on greater importance.

#### Online Travel Agents (OTAs)

*Technology changes have permitted fragmentation of distribution channels and paved way for OTAs to enter the market. Traditional agents typically bundled packages and "hid" their service fees/margins, the arrival of OTAs has brought "unbundling" of packages, allowing consumers to pick, choose and create DIY holiday arrangements. OTAs don't generally demark couples as honeymooners, however, they do note clients often contact properties to advise they are honeymooners. Most OTAs do not handle groups; consequently don't generally handle weddings.*

## 7.2 SOURCE MARKET DISTRIBUTION AND TRENDS

The Internet has made a significant difference to weddings and honeymoon distribution. Now accessible via tablets and smart phones; websites, digital media and social media have come to dominate how the tourism industry reaches out to the customer. The exponential growth in mobile apps and availability of personal hotspots and free Wi-Fi have made researching, planning, booking, sharing take on a whole new direction.

Wedding and honeymoon couples are also increasingly booking direct or using multiple distribution channels to build DIY weddings and honeymoons. They will book flights via an airline website, direct their wedding guests to a travel agent for accommodation bookings and contact the resort directly to book their wedding arrangements

Retail travel agents are becoming home-based travel advisors and wholesale travel agents are increasingly reshaping as specialist travel companies. The trade is no longer the gatekeeper of information. It's now about where fulfilment based on trust and service that is provided to the customer, rather than just making bookings.

Websites are becoming an extension of a company's persona. Linked to this is a corresponding increase in digital media that includes AdWords, EDMs, online advertising, search engine marketing and optimising search engines).

In nations that lead the charge for sales of tablets and smartphones, North America and Asia are already showing stronger preference for social media as a distribution platform.

Table ii summarises key promotional channels for source market travel companies.

**Table 2 | Travel trade promotional channels in PICs source markets**

Channel	AUS	NZ	Nth Am	UK/ EU	Asia	World
<b>Own Website</b>	1	1	2	1	5	1
<b>Digital Media</b> (AdWords, E-newsletters)	1	3	1	4	1	2
<b>Client Referrals</b> (word-of-mouth)	3	3	4	2	1	3
<b>Social Media</b> (Facebook, Instagram, Twitter, Pinterest, YouTube )	6	6	3	5	3	4
<b>Referral websites</b> (tourism offices, airline, other distributors)	5	7	5	3	7	5
<b>General Retail Trade Distribution</b>	6	8	7	6	8	6
<b>Specialist Print Media</b> (magazines)	8	5	8	8	4	7
<b>Preferred Retail Trade Distribution</b>	3	2	6	9	9	8
<b>Mass Print Media</b> (newspapers )	9	11	9	7	6	9
<b>Television Advertising</b>	10	9	11	12	10	10
<b>Podcasting and/or Webcasting</b>	12	12	10	10	12	11
<b>Radio Advertising</b>	11	10	12	11	11	12

Source: Survey responses from around 60 source market travel companies promoting PICs

Distribution in source markets can be clustered into four main channels:

<b>Digital</b>	Websites, digital media, podcasting/webcasting
<b>Sharing</b>	Client referrals, social media, referral websites
<b>Trade</b>	Wholesalers and specialist travel companies
<b>Traditional</b>	Media distribution (print and broadcasting)

All 4 channel clusters are used to varying degrees in source markets.

### **Australia**

Digital distribution is the most important channel in Australia and this is continuing to replace more traditional forms such as print and travel expos. Whilst trade distribution remains important, digital channels are allowing organisations to more effectively target segments with defined search criteria.

### **NZ**

Distribution patterns in NZ mirror those of Australia. Although, relatively cheaper media costs and the vertically integrated nature of travel distribution tends to rank print media magazine higher in importance in NZ when compared to Australia.

### **North America**

Digital and social distribution play an most important role in raising awareness of PICs as wedding and honeymoon destinations in North America. This includes podcasting and webcasting due to the emergence of new value trends in social media and associated technology. Examples include GoPros with selfie-sticks used for socially sharing.

NTOs in North America are less inclined to use mainstream wedding print media or attend bridal expos and shows. This is mainly due to high costs and low return on investment. Although in Canada specialist trade see them as important distribution tools.

### **UK/Europe**

Distribution in UK/Europe market is governed by the “distance and numbers” theory. PICs are aspired destinations that are much harder to reach and relatively expensive compared to the sun drenched beach holidays that can be had in Southern Europe and the Mediterranean countries.

Aspirational behaviour generally sees clients preferring to hear feedback from those who have been. Whilst operator websites rank highest, client referrals feature prominently.

### **Asia**

Asia is unique in the sense that its larger population sets of China and India are relatively new travellers. It is natural that client referrals, targeted digital AdWords and social media dominate the landscape. It all comes down to the client being able to trust the operator for advice.

Despite higher cost of advertising, print media plays a role given that Asian cultures tend to be heavily influenced by celebrity culture (endorsements, places they have visited, what is cool and what is in fashion).



### 7.3 DISTRIBUTION RECOMMENDATIONS FOR OPERATORS

PIC wedding and honeymoon operators generally cluster their distribution methods around trade sales calls, releasing trade specials and focusing on consumer expos.

Social media and some form of digital distribution is observed but these tend to be sporadic and often without a structured approach that allows for measurability and taking any corrective action.

**The following steps are recommended as guidelines for improving distribution:**

#### **Website**

- Invest in a clean and functional website.
- Content, photography and videos should be at a minimum broadband quality for consumers to research and for operators in your source markets to confidently add links to PIC operators.
- Share your web content with your key partners.
- Have a content management solution that is able to track where the web-referrals came from and reward your source market partners.
- Ensure the content on your website is accurate and kept up to date.
- Have an option for people to sign up to a newsletter. This helps you build a database keep people updated with your product.
- Include agents in your source markets on your contact page – gives added comfort to clients that there is someone in their country or region that can contact.

#### **Digital Media**

- Work with your top operators in source markets and consider joint/co-op investment in digital campaigns.
- At the same time consider optimising traffic to your own website. Tools such as AdWords are very cost effective ways you can target specific markets

#### **Social Media and Referrals:**

- Ensure that current and past guests have the opportunity to voice their praise and concerns with your property. This helps generate free awareness.
- Set up a Facebook page and sign-up to Instagram (helps get those magical weddings and romantic sunsets up the web as soon as possible). These are 2 social media tools, but others are evolving all the time. Share your wedding and honeymoon updates with your social media network

#### **Build a network**

- Having a friendly relationship with other operators and service providers is essential. Encourage the sharing of information and never get too precious about your product.
- Linking in with auxiliary service providers like photographers, spa centres, transport companies, cruise and tour operators will enable you to enhance the value of your product and broaden distribution opportunities.



Samoa. Photo courtesy Samoa Tourism Authority / David Kirkland

## 8 MARKETING CHANNELS AND RECOMMENDATIONS

In this section we discuss:

- Marketing channels
- Source market marketing and trends
- Marketing recommendations for operators

### 8.1 MARKETING CHANNELS

Marketing channels and distribution are used in an inter-twined fashion in most tourism circles. Given this, the focus of this section is to look at the nature and characteristics of various forms of media in marketing and selling wedding and honeymoon tourism.

As with distribution it is important to choose marketing channels that provide a return on investment, whilst at the same time build awareness of your wedding and honeymoon business.

Wedding and honeymoon operators in PICs currently use the following marketing channels to promote their businesses:

- 1) Internet via own website SEO
- 2) Overseas travel trade via cooperative marketing
- 3) Social media
- 4) Client referrals

These mediums pretty much follow the pattern of product distribution. Notably digital media was not seen as such an important marketing channel, yet this should be directly linked with operators' website activity

The internet is of course changing this. A website, along with a digital and social media strategy are major marketing channels that no wedding and honeymoon tourism business should ignore.

## 8.2 SOURCE MARKET MARKETING TRENDS

Mirroring distribution, in PIC source markets websites and digital media occupy prime real estate in marketing weddings and honeymoons. Referrals, word-of-mouth or via social media and referrals from other websites complete the top five marketing channels.

Boundaries between sales, marketing and public relations are increasingly intertwined and there are multiple sources of information and user generated content. Consumers have to decipher through cluttered information (blogs, advertisements, reviews such as Trip Advisor or from past customers, publicity – good or bad).

Wedding and bridal magazines have long dominated market messaging. With brides traditionally taking the leading role in determining "the big day", marketers have always targeted the bride through actively promoting the honeymoon dream. Internet and smart device technology has fundamentally changed how this is done. While glossy images and postproduction video content

are still important, user generated content, video uploads and the popularity of digital and social media mean that operators and indeed travel partners in source markets have to portray content more realistically.

Among source market travel trade, brochures have remained relevant, where travel partners credit securing wedding bookings by presenting in-country wedding requirements, comparison of wedding packages and locations in one convenient brochure as a key driver. Price comparison sites in the OTA space such as hotelscombined.com and trivago.com, have sprung up that provide meaningful comparison for those clients that prefer to book online.

Marketing channels used can vary in different source markets.

### **Australia**

Website marketing is the preferred channel in Australia, with word of mouth being the next. The strong endorsement of client referrals can be attributed to the sense of wanting to belong and/or share same value set among peers – so a beach wedding referral tends to trigger beach weddings and chapel weddings for more chapel weddings. Equally important was preferred retail distribution, and especially where a brochure dedicated to weddings and honeymoon existed.

### **NZ**

Website is also the most important channel in NZ with retail distribution being second. NZ has the highest ratio of travel agents to population with passports; the major wholesaler/retailers have dedicated weddings and honeymoon brochures.

**North America**

Digital media followed by operator's own website rank as the most important channels for marketing with specialist agencies that sell PICs in North America. Social media is next. The USA has one of the highest usage rates for social media, which is one of the most cost effective marketing and messaging channels.

**UK/Europe**

In contrast to North America, client referral is the second most important form of attracting customers to book a wedding or honeymoon to PICs, after operator's own website. Further analysis shows that the number of UK/Europeans have a greater understanding and awareness of PICs; this points to the value of strong cultural connections, especially in France and UK, where many people have family and friends who live in the French Pacific territories or Australia/NZ respectively.

**Asia**

Asia contains a mix of newly emerging markets and relative stable mature markets for most PICs. The dominant forms of marketing to customers is digital media and word-of-mouth or client referrals. This includes the extension of client referrals via social media. A common trait across all Asian countries is that customers tend to "follow the trend" set by opinion makers such as film stars and other famous nationals or influential "hip hop/cool" groups. Because PICs are comparatively unknown, it is normally those with relatively higher disposable incomes that travel to PICs

Asia is also unique in that specialist print media such as magazines rates high, particularly if the destination can be associated with other brands that are in vogue.



*Palau. Photo courtesy SPTO / David Kirkland*



### 8.3 MARKETING RECOMMENDATIONS TO OPERATORS

**Website**

Review it to make sure content is responsive – auto adapts to computers, laptops, mobile devices. Ensure your source market partners are linked up.

**Search Engine Optimisation**

Collaborate with partners that do search engine marketing

**Let people connect**

Consider the opportunity cost of including unlimited WIFI in weddings and honeymoon packages. In the world of falling global roaming costs and falling telco costs, this is a very powerful tool in instant information sharing and gathering social following.

**Social Media**

Invest in a social media respondent/executive – social media investment does not need to be complicated expensive campaigns. Given the relative cost of human resources, having a well-trained person can be extremely effective in communicating with existing and potential customers, referring them to key partners in their source markets and encouraging greater social sharing.

**Consider digital radio advertising**

Most social media users do listen to music and most will consider digital radio. Co-investment with key operators in source markets is a great way to market test.

**Giveaways – cost effective exposure.** Television/press advertising still has relevance in relation to what it is costing the property. If it involves giving away holidays in return for exposure with a co-partner, properties certainly get a return for their investment. Even if the return relative to other forms was lower, but so was the investment!

**An observation on Travel, Wedding and Bridal Expos**

*Travel expos drew mixed responses in all surveys and interviews. The common trait for those for whom the show was an absolute success were those that had a combination of hotel partners from the source country; photographers and dress hire companies from the source country; bloggers and media associated with country's knowledge all in one zone, giving potential clients comfort and confidence that their overseas wedding and/or honeymoon will run smoothly.*

## 9 TRAVEL TRADE IN SOURCE MARKETS

In this section we:

- Discuss working with the travel trade
- Provide a list of some key source market wedding and honeymoon travel trade.

Distributing and marketing your product are crucial to the success of any tourism business. Whilst many SME tourism operators in PICs find the cost of working with overseas travel trade an expensive option, with the right pricing model and alliances, there can be real benefits.

Whilst direct selling via your website and doing your own digital marketing may generate a volume of sales, working with the overseas trade (even if on a selected basis) give tourism operators access to distribution and marketing channels that may otherwise be missed or unattainable. For example many overseas wedding and honeymoon travel trade, have access to significant databases and other forms of promotion that a single operator could not afford to access.

For the wedding and honeymoon market there are a growing number of specialist travel companies in all source markets who are focussing on the sector. Major brands often have dedicated wedding teams and distribute online and printed wedding and honeymoon brochures. They also have alliances with wedding promotional companies, bridal registries and wedding expos to name a few.

Pricing structure plays an important role in working with the trade. Tourism operators should price their product for the international market accordingly, to ensure they are not left feeling short changed. Operators can usually expect commission levels of between 15 and 25% to be payable if they intend working directly with overseas trade. For some markets (especially lower volume, long-haul) it can be more effective to work with a local inbound tour operator. This generally enables easier communication, and you are more likely to know who you are working with. Commission levels of around 30% should be costed in as inbound companies act as distributors on behalf of local operators.

The following lists are intended to be a sample of travel companies in source markets selling weddings and honeymoons. The lists are by no means exhaustive and there are other travel trade not listed here. We recommend tourism operators work with their NTO and NTO overseas marketing representatives to obtain up to date and more specific information about overseas travel companies they may wish to work with in source markets.



Company	Website	South Pacific Destinations	Distribution	Remarks
<b>AUSTRALIA</b>				
Coral Seas	coralseas.com.au	Most PICs	Trade & Consumer	Weddings & Honeymoons
Creative Holidays	creativeholidays.com.au	Selected PICs	Trade	
Infinity Holidays	infinityholidays.com.au	Selected PICs	Flight Centre Brands	
Fusion Holidays /Travelonline	fusionholidays.com.au	Most PICs	Consumer	
Island Escapes	islandescapes.com.au	Most PICs	Trade & Consumer	
Omniche Holidays /Spacifica	omnicheholidays.com	Most PICs	Trade & Consumer	
Pinpoint Travel Group /Rosie Holidays	pinpointtravelgroup.com.au	Selected PICs	Trade & Consumer	
Relaxaway Holidays (Australia)	relaxaway.com	Most PICs	Consumer	
Select Vacations	selectvacations.com.au	Selected PICs	Consumer	Weddings & Honeymoons
Millennium Travel Group	vanuatuescapes.com.au	Selected PICs	Consumer	
World Wide Weddings	<a href="http://www.weddings.com.au">www.weddings.com.au</a>	Most PICs	Consumer	Wedding specialist
<b>NZ</b>				
Air NZ Holidays	airnewzealand.co.nz	Most PICs	Trade & Consumer	
House of Travel	hot.co.nz	Most PICs	Trade & Consumer	
Infinity Holidays	flightcentre.co.nz	Most PICs	Flight Centre Brands	
Lifestyle Holidays	first-travel-group.co.nz	Most PICs	Trade & Consumer	
Mondo Travel	mondotravel.co.nz	Most PICs	Trade & Consumer	
Our Pacific	ourpacific.co.nz	Most PICs	Consumer	Honeymoon Specialists
Go Holidays	goholidays.co.nz	Most PICs	Trade and Consumer	
<b>UNITED STATES</b>				
Air NZ Vacations	airnewzealand.com/vacations	Selected PICs	Trade & Consumer	
Down Under Answers	duatravel.com	Selected PICs	Trade & Consumer	
Down Under Endeavours	downunderendeavours.com	Fiji, Cook Islands	Consumer	
Fiji Vacations	fijivacations.com	Fiji, Tahiti	Consumer	Weddings & Honeymoons
Islands in the Sun	islandsinthesun.com	Selected PICs	Trade	
Pacific Destination Center	pacific-destinations.com	Most PICs	Consumer	
Outdoor Travel Adventures	otadventures.com	Selected PICs	Consumer	Experiential Honeymoons
Costco Travel	costcotravel.com	Fiji, Tahiti	Affinity/Consumer	
Pacific Islands.com	pacificislands.com	Most PICs	Consumer	
Springboard Vacations	springboardvacations.com	Selected PICs	Consumer	
Pleasant Holidays	pleasantholidays.com	Selected PICs	Trade & Consumer	
Tahiti Legends	tahitilegends.com	Selected PICs	Consumer	
Tahiti.com	tahiti.com	Tahiti	OTA consumer	

Company	Website	South Pacific Destinations	Distribution	Remarks
<b>CANADA</b>				
Boomerang Tours	boomerangtours.ca	Most PICs	Trade & Consumer	
Down Under Travel	downunder-travel.com	Selected PICs	Consumer	Weddings & Honeymoons
Anderson Vacations	downundersolution.com	Selected PICs	Consumer	
Goway International Travel	goway.com	Most PICs	Trade & Consumer	
<b>ARGENTINA</b>				
Asante Viajes	asanteviajes.com	Fiji, Tahiti	Consumer	
<b>BRAZIL</b>				
Designer Tours	designertours.com.br	Selected PICs	Consumer	
Kangaroo Tours Brazil	kangarootour.com.br	Fiji, Tahiti	Consumer	
<b>CHILE</b>				
Easy Chile	polinesia.cl	Tahiti	Trade & Consumer	
Kangaroo Tours Chile	kangarootours.cl	Fiji, Tahiti	Consumer	
<b>PERU</b>				
Volare Viajes	volare-viajes.com	Selected PICs	Consumer	
<b>UNITED KINGDOM (UK)</b>				
All Ways Tailor Made	awtm.co.uk	Most PICs	Consumer	
Austravel	austravel.com	Selected PICs	Trade & Consumer	
Audley Travel	audleytravel.com	Selected PICs	Trade & Consumer	
Destinology	destinology.co.uk	Selected PICs	Trade & Consumer	
Kuoni Travel	kuoni.co.uk	Selected PICs	Trade & Consumer	
Turquoise Holidays	turquoiseholidays.co.uk	Selected PICs	Trade & Consumer	Weddings & Honeymoons
Transpacific Holidays	transpacificholidays.co.uk	Most PICs	Consumer	



Cook Islands. Photo courtesy SPTO / David Kirkland

Company	Website	South Pacific Destinations	Distribution	Remarks
<b>EUROPE</b>				
<b>Denmark</b>				
Nyhavn Rejser	nyhavn.dk	Selected PICs	Consumer	
<b>Finland</b>				
Aktiv Resor	aktiv-resor.fi	Most PICs	Consumer	
<b>France</b>				
Faré Voyages	farevoyages.com	Tahiti, New Caledonia	Consumer	
Austral Lagons	australagons.com	Tahiti	Consumer	
Voyage de Legende	voyagedelegande.com	Tahiti, New Caledonia	Affinity/Consumer	Honeymoon specialists
<b>Germany</b>				
Honeymoon Travel	honeymoontravel.de	Selected PICs	Consumer	Honeymoon specialists
Travelhouse Königstein	travel-house.de	Fiji and Tahiti	Consumer	Honeymoon specialists
PRIVATTOUR	privattour.com	Tahiti	Consumer	Honeymoon specialists
<b>Italy</b>				
Honeymoon Travel	inpolinesia.it	Selected PICs	Trade & Consumer	Honeymoon specialists
Prestige Italy Gold	prestigeitalygold.it	Tahiti, Cook Islands	Consumer	
Fiji Time	fijitime.it	Most PICs	Consumer	
Pan Pacific	panpacific.it	Most PICs	Consumer	Weddings & Honeymoons
<b>Spain</b>				
Pasifika Viajes	pasifika.es	Selected PICs	Consumer	Weddings & Honeymoons
Xavi Fernandez Viajes	xfviajes.com	Selected PICs	Consumer	Weddings & Honeymoons
<b>Sweden</b>				
Tour Pacific	tourpacific.se	Selected PICs	Consumer	
<b>Switzerland</b>				
Honeymoon Travel	honeymoontravel.ch	Selected PICs	Consumer	
Travel House	travel-house.ch	Selected PICs	Trade & Consumer	
<b>ASIA</b>				
<b>China</b>				
Polynesie Voyages		Tahiti	Trade & Consumer	Honeymoons
China Eastern Travel (Islands Division)	<a href="http://mutrip.com">mutrip.com</a>	Selected PICs	Trade & Consumer	Airline travel division
<b>India</b>				
A Travel Duet	<a href="http://atravelduet.com">atravelduet.com</a>	Selected PICs	Trade & Consumer	weddings & honeymoons
Beacon Holidays	<a href="http://beaconholidays.com">beaconholidays.com</a>	Selected PICs	Trade & Consumer	Luxury destinations
<b>South Korea</b>				
Highest Travel	histtour.com	Selected PICs	Consumer	Honeymoons
Dreamtne Inc	sptkorea.kr	Selected PICs	Consumer	Honeymoons
Inter Oz Korea Travel	n/a	Fiji	Consumer	
<b>Japan</b>				
NOE Corp	noe-j.co.jp	Selected PICs	Consumer	Honeymoons
Playguide Tours Inc	playguidetour.co.jp	Selected PICs	Consumer	Honeymoons
ST World	stworld.co.jp	Selected PICs	Consumer	Honeymoons
<b>Online Travel Agencies (OTAs)   Global reach with Pacific Islands contracting done via Australia/NZ</b>				
Booking.com	<a href="http://booking.com">booking.com</a>	Most PICs	OTA consumer	Global OTA
Expedia	<a href="http://expedia.com">expedia.com</a>	Most PICs	OTA consumer	Global OTA
Agoda	<a href="http://agoda.com">agoda.com</a>	Most PICs	OTA consumer	Global OTA

## 10 INDUSTRY BODIES, RESOURCES & ASSOCIATIONS

The following lists include bodies and organisations that may assist PICs wedding and honeymoon operators access new markets, engage with potential industry partners and communicate more effectively with potential clients.

### 10.1 GLOBAL AND REGIONAL BODIES

#### **United Nations World Tourism Organization (UNWTO)**

United Nations body that is charged with a number of high-level global tourism responsibilities, one of which is the disbursement of knowledge. This includes a wide range of online resources, free and paid, that include many studies, updates and statistics that may assist wedding and honeymoon tourism operators with an update to date ongoing understanding of trends and changes and in global tourism. [www.unwto.org](http://www.unwto.org)

#### **Pacific Islands Trade and Invest (PT&I)**

An arm of the Pacific islands Forum, Pacific Islands Trade and Invest is a regional export, trade and tourism promotion body that provides practical assistance to promote Pacific islands Tourism Businesses. Offices are located in NZ, Australia, Japan, China, Switzerland and Fiji. [www.pacifictradeinvest.com](http://www.pacifictradeinvest.com)

### 10.2 INDUSTRY BODIES AND ASSOCIATIONS IN KEY SOURCE MARKETS

#### **AUSTRALIA**

##### **Council of Australian Tourism Operators (CATO)**

Representative body for wholesale tour operators. This body includes amongst its members most of Australia's major tour operators and travel wholesalers. [www.cato.asn.au](http://www.cato.asn.au)

#### **NZ**

##### **Travel agents association of NZ (TAANZ)**

NZ's trade organisation representing travel agents, approved travel brokers and tour operator distribution system. There is no government licensing for travel agents in NZ so TAANZ is a self-regulating organisation promoting quality standards, service and performance. Also supports industry training programmes. [www.taanz.org.nz](http://www.taanz.org.nz)

#### **NORTH AMERICA**

##### **United States Tour Operators Association (USTOA)**

Professional trade association created to promote integrity within the tour operator industry. Many of the US's leading tour operators are members. [www.ustoa.com](http://www.ustoa.com)

##### **Canadian Association of Tour Operators (CATO)**

National body representing Canadian tour operators. [www.cato.ca](http://www.cato.ca)

There are a number of associations in North America for wedding planners, including some offering online courses targeted at the hotel industry.

**UK/EUROPE****Association of British Travel Agents (ABTA)**

UK's leading travel agents association promoting responsible tourism practices in the UK.

[www.abta.com](http://www.abta.com)

**European Travel Agents and Tour Operators Association (ECTAA)**

Overarching body European travel and tour operator associations based in Brussels, Belgium.

ECTAA represents associations of 30 countries across Europe. [www.ectaa.org](http://www.ectaa.org)

**ASIA****Japan Association of Travel Agents (JATA)**

It contributes to the development of the travel and tourism industry and currently has over 1,100 member travel agencies throughout Japan. [www.jata-net.or.jp/english/](http://www.jata-net.or.jp/english/)

**Travel Agents Association of India (TAAI)**

Recognised as the main representative body of the travel and tourism industry. Current membership of over 2,500 Indian travel companies. [www.travelagentsofindia.com](http://www.travelagentsofindia.com)

**10.3 OTHER RESOURCES**

Networking forms an important part in developing a tourism business and there are a number of online and other resources wedding and honeymoon tourism operators can easily access. The following are a sample.

**LinkedIn**

There are many common interest groups and networks on LinkedIn that enable you to follow special interest areas such as weddings and honeymoons. [www.linkedin.com](http://www.linkedin.com)

**Trip Advisor**

Not only does Trip Advisor provide feedback on hotels, it also includes peoples feedback across a broad range of travel experiences, including wedding and honeymoon destinations. Provides insights into what people are saying about the services of providers around the globe. [www.tripadvisor.com](http://www.tripadvisor.com)

**Other Social Media**

Almost every form of social media have forums and special interest groups.

## 11 SPECIALISED MEDIA & PROMOTIONAL TOOLS

This section lists a number of key media and promotional tools in key source markets for PICs wedding and honeymoon tourism operators. Grouped by country and region are:

- Trade media
- Specialist weddings and honeymoon tourism media
- Trade fairs and expos for wedding and honeymoon tourism

The lists that follow are a sample only due to the large number of outlets. It is our recommendation that PICs operators identify which market/s they want to focus on. Then research all influencers that appear in social media, on blogs and Instagram to see which ones match their operational profile and then follow and contribute. Tools such as Facebook will enable you to find most highly ranked and popular media in selected target markets.

### 11.1 AUSTRALIA

#### TRADE MEDIA

Travel Weekly: [www.travelweekly.com.au](http://www.travelweekly.com.au)

Travel Daily: [www.traveldaily.com.au](http://www.traveldaily.com.au)

eGlobal Travel: [www.eglobaltravelmedia.com.au](http://www.eglobaltravelmedia.com.au)

ETB News: [www.australia.etbtravelnews.com](http://www.australia.etbtravelnews.com)

#### SPECIALIST MEDIA

Bride to Be: [www.bridetobe.com.au](http://www.bridetobe.com.au)

Modern Wedding: [www.modernwedding.com.au](http://www.modernwedding.com.au)

Cosmopolitan: [www.cosmopolitan.com.au/bride](http://www.cosmopolitan.com.au/bride)

The Knot: <http://theknot.ninemsn.com.au>

#### TRADE FAIRS & EXPOS

Show/Expo	Location	Date	Website
Wedding Expos Australia	Sydney, Melbourne, Brisbane, Perth	Varies	<a href="http://www.weddingexposaustralia.com.au">www.weddingexposaustralia.com.au</a>
Bridal Expos Australia	National	Varies	<a href="http://www.bridalexpos.com.au">www.bridalexpos.com.au</a>
Flight Centre Travel Expos	National	Feb	<a href="http://www.travelexpo.net.au">www.travelexpo.net.au</a>



## 11.2 NEW ZEALAND

### TRADE MEDIA

Tabs on Travel: [www.traveltoday.co.nz](http://www.traveltoday.co.nz)

Travellnc Magazine: [www.travelinc.co.nz](http://www.travelinc.co.nz)

Lets Travel Magazine: [www.letstravelmag.com](http://www.letstravelmag.com)

Islandtime Magazine: [www.islandtime.co.nz](http://www.islandtime.co.nz)

### SPECIALIST MEDIA

Bride & Groom: [www.brideandgroom.co.nz](http://www.brideandgroom.co.nz)

New Zealand Weddings: [www.newzealandweddings.co.nz](http://www.newzealandweddings.co.nz)

My Wedding Magazine: [www.myweddingmag.co.nz](http://www.myweddingmag.co.nz)

### TRADE FAIRS & EXPOS

Show/Expo	Location	Date	Website
The Great NZ Bridal Show	Christchurch	May	<a href="http://www.thebridalshow.co.nz">www.thebridalshow.co.nz</a>
Wedding Expo (Auckland)	Auckland	Apr	<a href="http://www.weddingshow.co.nz">www.weddingshow.co.nz</a>
Flight Centre Travel Expos	National	Feb	<a href="http://www.flightcentre.co.nz/travel-extras/travel-expo/travel-expo-overview">www.flightcentre.co.nz/travel-extras/travel-expo/travel-expo-overview</a>

## 11.3 NORTH AMERICA

### TRADE MEDIA

Travel Press and Travel Courier (Canada) : [www.travelpress.com](http://www.travelpress.com)

Travelweek (Canada):. [www.travelweek.ca](http://www.travelweek.ca)

Travel Agent Central (USA): [www.travelagentcentral.com](http://www.travelagentcentral.com)

Luxury Travel Advisor (USA): [www.luxurytraveladvisor.com](http://www.luxurytraveladvisor.com)

Travel Weekly (USA) : [www.travelweekly.com](http://www.travelweekly.com)

### SPECIALIST MEDIA

Brides: [www.brides.com](http://www.brides.com)

Martha Stewart Weddings: [www.marthastewartweddings.com](http://www.marthastewartweddings.com)

Destinations Wedding and Honeymoons: [www.destinationweddingmag.com](http://www.destinationweddingmag.com)

The Knot Magazine: [www.theknot.com](http://www.theknot.com)

### TRADE FAIRS & EXPOS

Show/Expo	Location	Date	Website
Canada's Bridal Show	Toronto	Twice Yearly	<a href="http://www.canadasbridalshow.com">www.canadasbridalshow.com</a>
Vancouver Wedding Show	Vancouver	Twice Yearly	
Great Bridal Expo (USA)	National	Varies	<a href="http://www.greatbridalexpo.com">www.greatbridalexpo.com</a>
The Knot Expos (USA)	National	Varies	<a href="http://planning.theknot.com/calendar/bridal-shows">planning.theknot.com/calendar/bridal-shows</a>

## 11.4 UK /EUROPE

### TRADE MEDIA

Travelweekly (UK): [www.travelweekly.co.uk](http://www.travelweekly.co.uk)

TourMag. (France): [www.tourmag.com](http://www.tourmag.com)

FVW (Germany): [www.fvw.com](http://www.fvw.com)

TTG (Italy): [www.ttgitalia.com](http://www.ttgitalia.com)

### SPECIALIST MEDIA

Conde Nast Brides: [www.bridesmagazine.co.uk/](http://www.bridesmagazine.co.uk/)

You and Your Wedding: [www.youandyourwedding.co.uk](http://www.youandyourwedding.co.uk)

Marriage, France: [www.marieclaire.fr/mariage,20011.asp2](http://www.marieclaire.fr/mariage,20011.asp2)

### TRADE FAIRS & EXPOS

Show/Expo	Location	Date	Website
The London Bridal Show	London	March	<a href="http://www.thelondonbridalshow.co.uk">www.thelondonbridalshow.co.uk</a>
Conde Nest Brides –The Show	London	October	<a href="http://bridestheshow.co.uk/">http://bridestheshow.co.uk/</a>
French bridal shows	Varies	Varies	<a href="http://10times.com/france/wedding-bridal/tradeshows">http://10times.com/france/wedding-bridal/tradeshows</a>

## 11.5 ASIA

### TRADE MEDIA

TravTalk (India): [www.travtalkindia.com](http://www.travtalkindia.com)

Holiday Talk (India) : [www.holidaytalk.in](http://www.holidaytalk.in)

Travel Vision (Japan): [www.travelvision.co.jp](http://www.travelvision.co.jp)

Travel Journal (Japan): [www.tjnet.co.jp/](http://www.tjnet.co.jp/)

TTG (China): [www.ttgchina.com](http://www.ttgchina.com)

Travel Weekly (China): [www.travelweekly-china.com](http://www.travelweekly-china.com)

Korea Travel Times (South Korea): [www.traveltimes.co.kr](http://www.traveltimes.co.kr)

### SPECIALIST MEDIA

Verve Magazine (India): [www.vervemaagazine.in](http://www.vervemaagazine.in)

Conde Nast Traveller (India): [www.cntraveller.in](http://www.cntraveller.in)

Zexy Magazine (Japan): [www.zexy.net](http://www.zexy.net)

Travel World China Magazine (China): <http://e-travelworld.cn/>

Shanghai Travellers Club Magazine (China): [www.chinaelitefocus.com](http://www.chinaelitefocus.com)

Wedding 21 (South Korea): - <http://wedding21.wef.co.kr/main/index>

My Wedding (South Korea): <http://mywedding.design.co.kr/>

### TRADE FAIRS & EXPOS

Show/Expo	Location	Date	Website
India International Travel Mart	National	Varies	<a href="http://www.iitmindia.com">www.iitmindia.com</a>
JATA Tourism Expo	Tokyo	Sep	<a href="http://www.t-expo.jp/en">www.t-expo.jp/en</a>
COTTM China Outbound Travel and Tourism Market	Beijing	Apr	<a href="http://www.cottm.com">www.cottm.com</a>
CITM (China International Travel Mart)	Shanghai	Nov	<a href="http://www.citm.com.cn/english">www.citm.com.cn/english</a>
Korean Travel Fair KOTFA	Seoul	Jun	<a href="http://www.kotfa.co.kr/eng/">www.kotfa.co.kr/eng/</a>

Table 1 – References

- <sup>i</sup> Potential market size is an estimate based on percentage of population married per year who hold a passport. All numbers rounded to nearest 100 based on available data.
- <sup>ii</sup> Australian Bureau of Statistics (ABS), 2013. <http://www.abs.gov.au/ausstats/abs@.nsf/mf/3310.0>. Estimate based on 118,962 registered marriages in Australia in 2013 at 2 persons per marriage.
- <sup>iii</sup> ABS, 2013. <http://www.abs.gov.au/AUSSTATS/abs@.nsf/allprimarymainfeatures/61D19DFBD033B48FCA257CA7000DCB16?opendocument>
- <sup>iv</sup> Australian Passport Office. "The evolution of the Australian Passport" <https://www.passports.gov.au/Web/HistoryOfPassports/PassportEvolution.aspx>. Estimated based on "just under 50%" holding a passport.
- <sup>v</sup> Statistics NZ, 2014. Civil Unions & Marriages. [http://www.stats.govt.nz/browse\\_for\\_stats/people\\_and\\_communities/marriages-civil-unions-and-divorces/CivilUnionsAndMarriages\\_HOTPSep14qtr.aspx](http://www.stats.govt.nz/browse_for_stats/people_and_communities/marriages-civil-unions-and-divorces/CivilUnionsAndMarriages_HOTPSep14qtr.aspx)
- <sup>vi</sup> Statistics NZ, 2014. National Population Estimate, June 2013. [http://www.stats.govt.nz/browse\\_for\\_stats/population/estimates\\_and\\_projections/NationalPopulationEstimates\\_HOTPat30Jun14.aspx](http://www.stats.govt.nz/browse_for_stats/population/estimates_and_projections/NationalPopulationEstimates_HOTPat30Jun14.aspx)
- <sup>vii</sup> Passport Canada, 2012. "International Comparison of Passport Issuing Authorities" [http://publications.gc.ca/collections/collection\\_2013/aecic-faitc/E77-2-6-2012-eng.pdf](http://publications.gc.ca/collections/collection_2013/aecic-faitc/E77-2-6-2012-eng.pdf)
- <sup>viii</sup> Statistics Canada, 2011 Marital status overview. <http://www.statcan.gc.ca/pub/91-209-x/2013001/article/11788-eng.htm>. Data from last official register of 147,848 marriages in 2008. Note official records not kept since 2008, however rate of decline over previous years indicates little change in raw number.
- <sup>ix</sup> Statistics Canada, 2014. Population Overview. <http://www.statcan.gc.ca/daily-quotidien/140926/dq140926b-eng.htm>
- <sup>x</sup> Passport Canada, 2014. Canadian Passport Possession rate. [http://www.ppt.gc.ca/publications/ar\\_12.aspx?lang=eng#\\_Toc359403296](http://www.ppt.gc.ca/publications/ar_12.aspx?lang=eng#_Toc359403296) Estimate for 2013
- <sup>xi</sup> US National Center for Health Statistics, 2011. [http://www.cdc.gov/nchs/nvss/marriage\\_divorce\\_tables.htm](http://www.cdc.gov/nchs/nvss/marriage_divorce_tables.htm). National Marriage and Divorce rate trends
- <sup>xii</sup> US Census Bureau, 2014. <http://www.census.gov/popclock/> Estimate of population at July 2014
- <sup>xiii</sup> US Department of State, Bureau of Consular Affairs, 2014. <http://travel.state.gov/content/passports/english/passports/statistics.html>. Valid passports in circulation.
- <sup>xiv</sup> Eurostat, 2014. [http://ec.europa.eu/eurostat/statistics-explained/index.php?title=Marriage\\_and\\_divorce\\_statistics&oldid=203747](http://ec.europa.eu/eurostat/statistics-explained/index.php?title=Marriage_and_divorce_statistics&oldid=203747). Estimate of marriages 2012
- <sup>xv</sup> Eurostat, 2014. [http://ec.europa.eu/eurostat/statistics-explained/index.php/Population\\_and\\_population\\_change\\_statistics#EU-28\\_population\\_continues\\_to\\_grow](http://ec.europa.eu/eurostat/statistics-explained/index.php/Population_and_population_change_statistics#EU-28_population_continues_to_grow). Estimate of population 2013
- <sup>xvi</sup> UK passport office statistics. <https://www.gov.uk/government/publications/passports-issued-under-the-6-british-citizenship-categories-2007-to-2012/passports-issued-under-the-6-british-citizenship-categories-2007-to-2012>. Based on average issued over 5 years with 10 year life of passport..
- <sup>xvii</sup> National Bureau of Statistics China 2014. <http://www.stats.gov.cn/tjsj/ndsj/2012/html/V2134e.xls> Marriages in 2012.
- <sup>xviii</sup> National Bureau of Statistics China 2014. <http://www.stats.gov.cn/tjsj/ndsj/2012/html/D0301e.xls> Population in 2012.
- <sup>xix</sup> Chinese Outbound Travel Market 2012. UNWTO 2012. Section 3.2, p17. Passports.
- <sup>xx</sup> Statistics Japan, 2014. <http://www.stat.go.jp/english/data/handbook/c0117.htm>. Statistical Handbook of Japan. Marriages in 2013.
- <sup>xxi</sup> Statistics Japan, 2014. <http://www.stat.go.jp/english/data/handbook/c0117.htm>. Statistical Handbook of Japan. Population in 2013.
- <sup>xxii</sup> Japan Tourism Marketing Co. 2010 <http://www.tourism.jp/en/column-opinion/hold-passport/>. Estimated based on trend in figures 2005-2009.



Pacific Regional Tourism Capacity  
Building Programme

Level 3, FNPF Place, 343-359 Victoria Parade | P.O. Box 13119, Suva, Fiji Islands.  
T | +679 330 4177 F | +679 330 1995 E | [tourism@spto.org](mailto:tourism@spto.org) W | [www.spto.org](http://www.spto.org)

ISBN 978-982-9807-88-5



9 789829 807885

