



Dadansoddi ar gyfer Polisi



Analysis for Policy

SOCIAL RESEARCH NUMBER: 43/2024
PUBLICATION DATE: 20/06/2024



Llywodraeth Cymru
Welsh Government

Visit Wales Market Demand Study – Ireland (2024)

Digital ISBN: **978-1-83625-228-3**

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Full Research Report: Visit Wales Market Demand Study – Ireland (2024)

Cardiff: Welsh Government, GSR report number 43/2024

Available at: <https://www.gov.wales/tourism-market-demand-reports-march-2024>

Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government.

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Contents

- 01** Background & Methodology
- 02** Key Findings
- 03** Profile of Irish Holiday Market
- 04** Holiday Drivers - UK
- 05** Wales visitation 2023
- 06** Intention to take a trip in Wales in 2024
- 07** Visit Wales marketing impact
- 08** “Welcome to Wrexham” impact
- 09** Reasons for not visiting Wales
- 10** Motivation & Perceptions



BACKGROUND & METHODOLOGY



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As the Welsh Government's tourism team, Visit Wales is responsible for deploying tourism campaigns in the UK and internationally to promote Wales as a holiday destination.

As part of this, each year Visit Wales conducts research amongst its priority markets. The research featured within this report covers the Ireland Market and broadly looks at:

- Profile of Irish Holiday Market
- Factors influencing UK short breaks and holidays (referred to in these reports as 'drivers')
- Short breaks and holidays taken in Wales in 2023
- Short breaks and holidays planned in Wales in 2024
- Visit Wales marketing impact
- "Welcome to Wrexham" impact
- Reasons for not visiting Wales
- Motivation & Perceptions



Methodology



Online
Survey



17 minutes
length of
interview



13th March –
5th April



Ireland

Respondents were contacted through an online panel. The survey could be completed via desktop or mobile device. 1000 respondents completed the survey. The data was then weighted to be representative of the Irish residents likely to take a UK trip in the next few years, ensuring comparability to previous studies, based on age, gender, regional spread and social grade. To qualify for the survey, participants must belong to the Irish holiday market, which is defined as:

- Lives in the Republic of Ireland.
- Aged 16+
- Making most overnight trip decisions themselves or with someone else.
- Be very/fairly likely to take a short break or holiday in the UK in the next few years.

Incidence Rate
49%





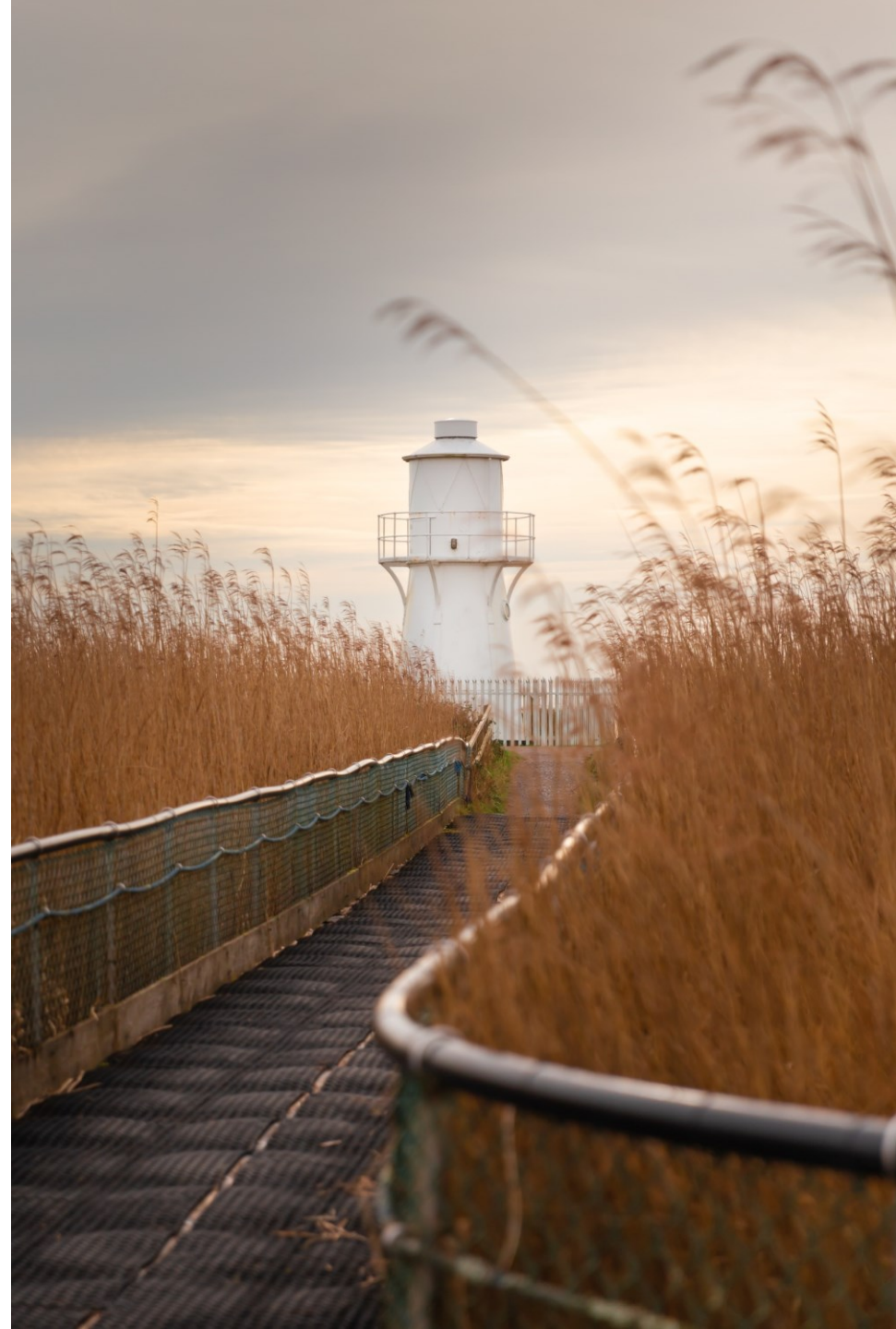
Definitions used within this report

In this report there are a number of terms to define the survey respondents. These include:

- **Irish holiday market:** The total survey population. Residents of the Republic of Ireland who are very/fairly likely to take a short break or holiday in the UK in the next few years.
- **Wales 2023 trip takers:** Residents of the Republic of Ireland who stated they took a short break or holiday in Wales in 2023. Trip behaviour for this audience relates to the whole year.
- **Non-Wales trip takers 2023:** Residents of the Republic of Ireland who stated they did not take a short break or holiday in Wales in 2023.
- **Wales trip intenders 2024:** Residents of the Republic of Ireland who are definitely or probably intending to take a short break or holiday in Wales in 2024. Trip behaviour for this audience relates to their next trip planned in Wales so will be naturally biased to earlier in the year. With this in mind, trips planned for 2024 should not be compared to trips taken in 2023.

Life stages are preferable to 'age' as they better describe someone's life situation. For the purpose of this report, the following is used:

- **Pre-nesters:** Aged 16-34 without children in household.
- **Families:** Aged 16-64 with children in household.
- **Older independents:** Aged 35-64 with no children in household.
- **Retirement age:** Aged 65+.



KEY FINDINGS



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Irish holidaymakers have a wide variety of preferred destinations

Irish tourists show a strong preference for the vibrant urban experiences offered by Welsh cities and large towns, as well as more relaxed coastal destinations.

Interest in cultural and culinary adventures drives visits

A considerable number of Irish visitors are drawn to Wales for its authentic cultural experiences, with a particular focus on local cuisine and heritage sites.

Marketing boosts Wales's image among Irish tourists

Effective marketing campaigns, including TV advertisements and social media, have notably enhanced the perception of Wales, increasing interest and likelihood of visits among Irish tourists.

"Welcome to Wrexham" enhances interest in Welsh Visits

The TV series "Welcome to Wrexham" has been particularly influential, making viewers more positive about visiting Wales and increasing the desire to explore both Wrexham and other parts of the country.

Preference for overseas travel and domestic alternatives present challenges

While overseas holidays remain the primary competition, Welsh tourism also contends with other key domestic destinations like the Republic of Ireland and London, necessitating promotional efforts to compete effectively.



PROFILE OF IRISH HOLIDAY MARKET



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The Irish holiday market is equally divided between males and females, with families and older independents comprising the largest life stage segments.

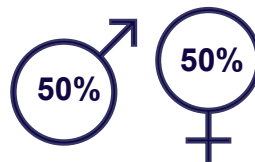


Life stage

Pre-nesters	18%
Families	34%
Older independents	31%
Retirement age	17%



Gender



Age

16-34	28%
35-54	39%
55-64	16%
65+	17%



Social class

AB	26%
C1	31%
C2	18%
DE	20%

S1. How do you describe your gender?

X2. Please type in your age.

X2b. Do you have any children aged 15 or under in your household that you are responsible for (parent, legal guardian etc.)?

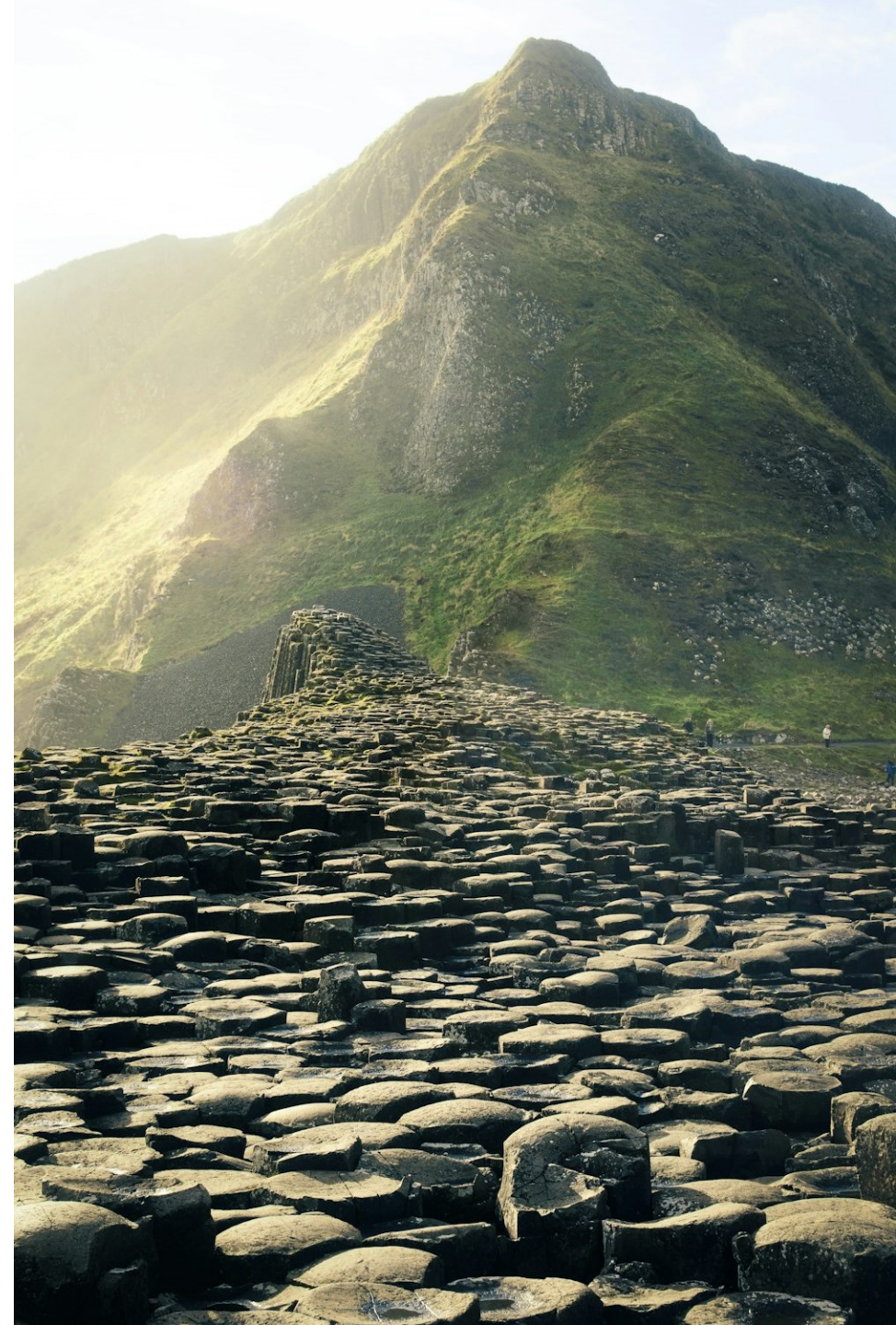
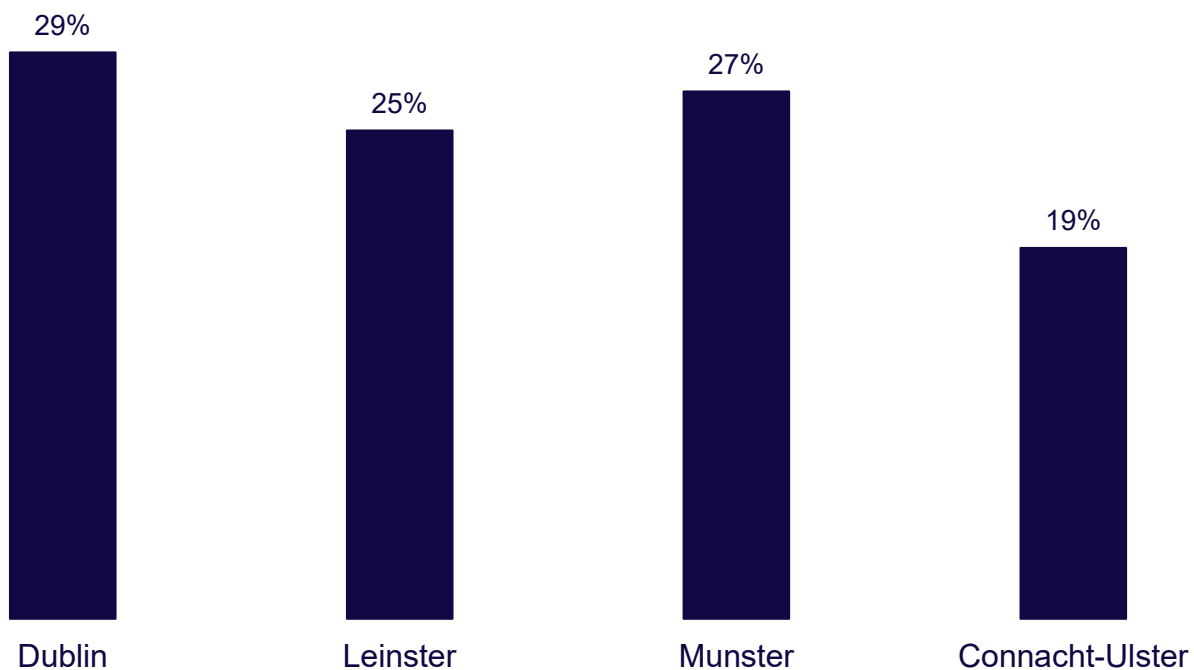
X3a. Which of these best describe you? X4a. Which one of these best describes the occupation of the main income earner in your household? X4b. You say that the main income earner in the household is now retired. Which one of the following best describes their occupation before they retired?

Total base size, n=1000.



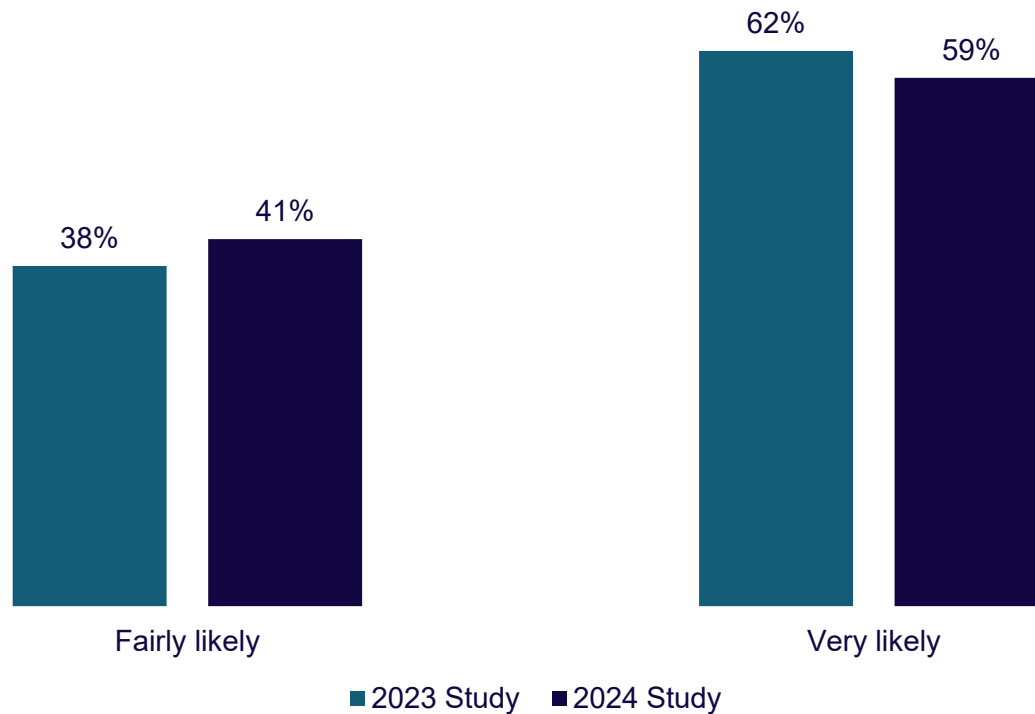
The sample represents a spread of the Irish population, with a relatively even spread across regional origin.

Region of origin



Around 3 in 5 (59%) of the Irish holiday market are very likely to take a UK short break or holiday in the next few years – broadly in line with figures from 2023 (62%).

Likelihood of taking a UK short break or holiday in the next few years

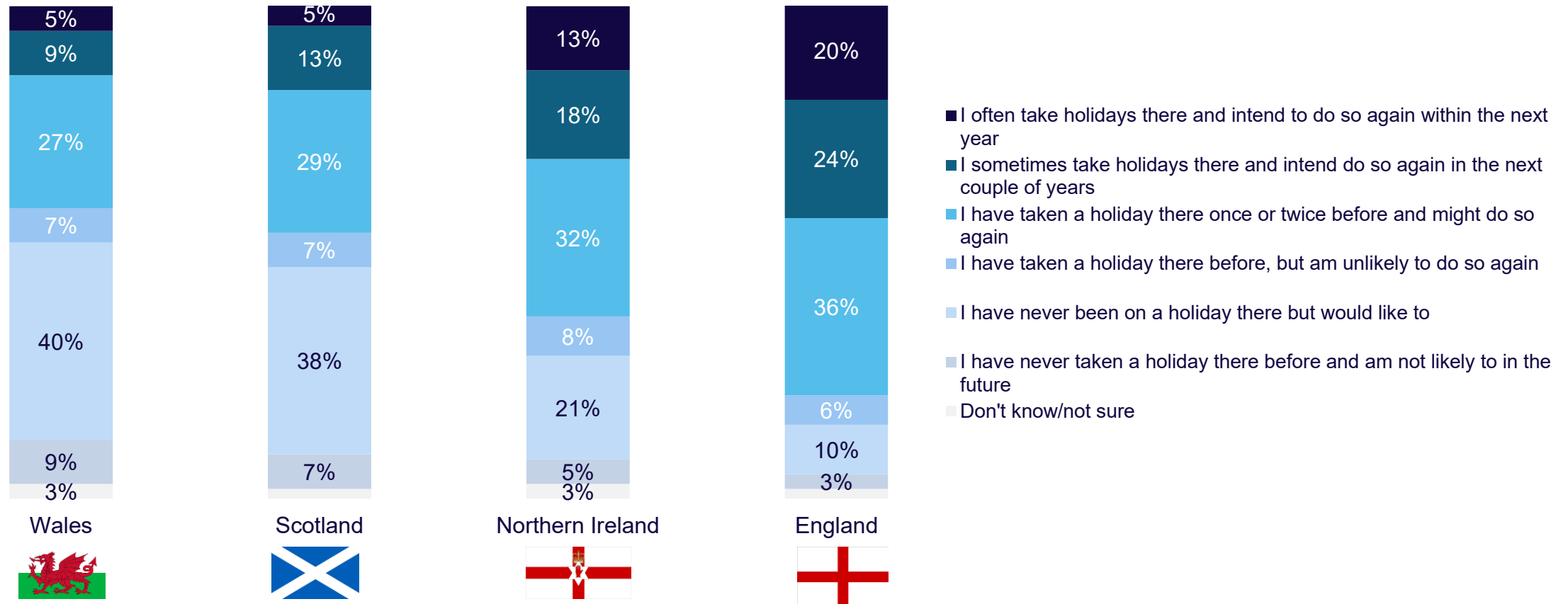


S6. How likely or unlikely are you to take a short break or holiday in the UK in the next few years? Total base size, n=1000.



England is the part of the UK most likely to generate regular short breaks or holidays with almost half of the Irish holiday market going there often or sometimes. Wales attracts the lowest proportion of regular visitors. However, 40% have never been to Wales but would like to, suggesting there is a substantial group of Irish holiday makers who could be tipped into visitation.

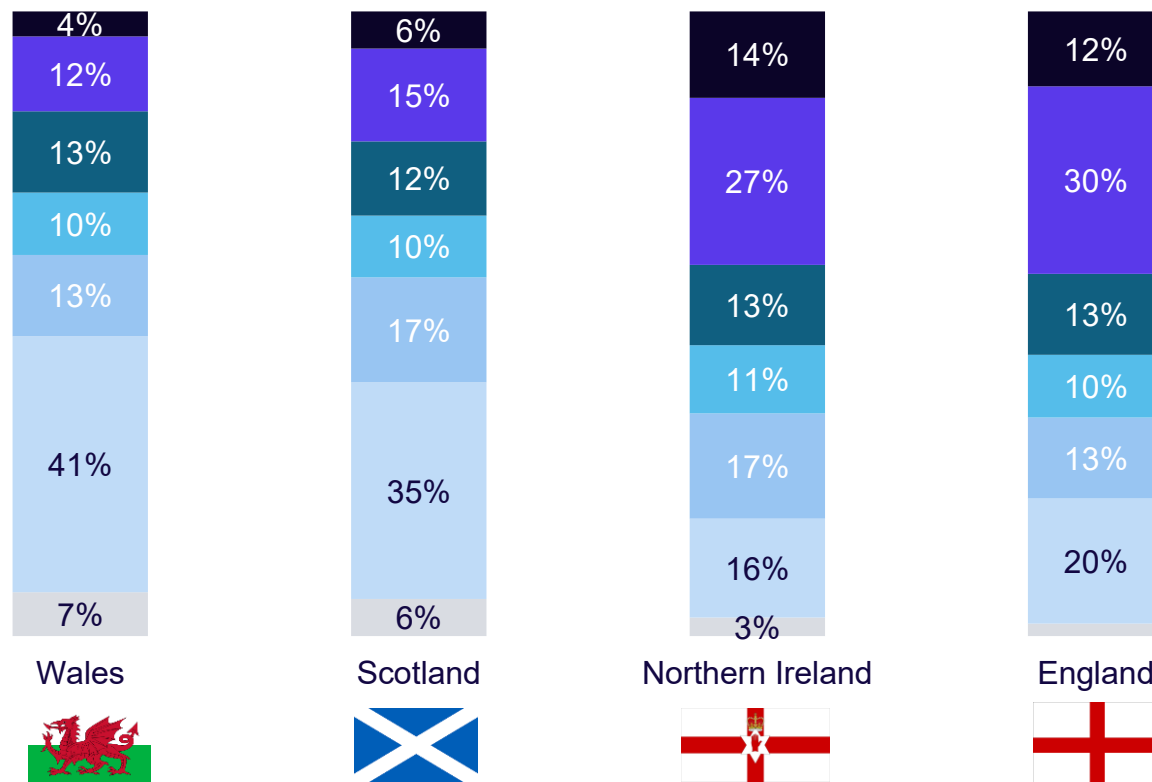
Relationship with each destination



Northern Ireland and England have experienced more frequent and recent visits from the Irish holiday market compared to Wales. This trend highlights a preference among Irish tourists for these destinations, possibly due to better travel connections and cultural connections.

Previous visits to each destination

■ 2024 ■ 2023 ■ 2022 ■ 2020 to 2021 ■ 2018 to 2019 ■ Before 2017 ■ Never visited



C2. When did you last visit these places for a short break or holiday? All who have visited or not sure, n=513 Wales, n=551 Scotland, n=747 Northern Ireland, n=869 England.

HOLIDAY DRIVERS - UK



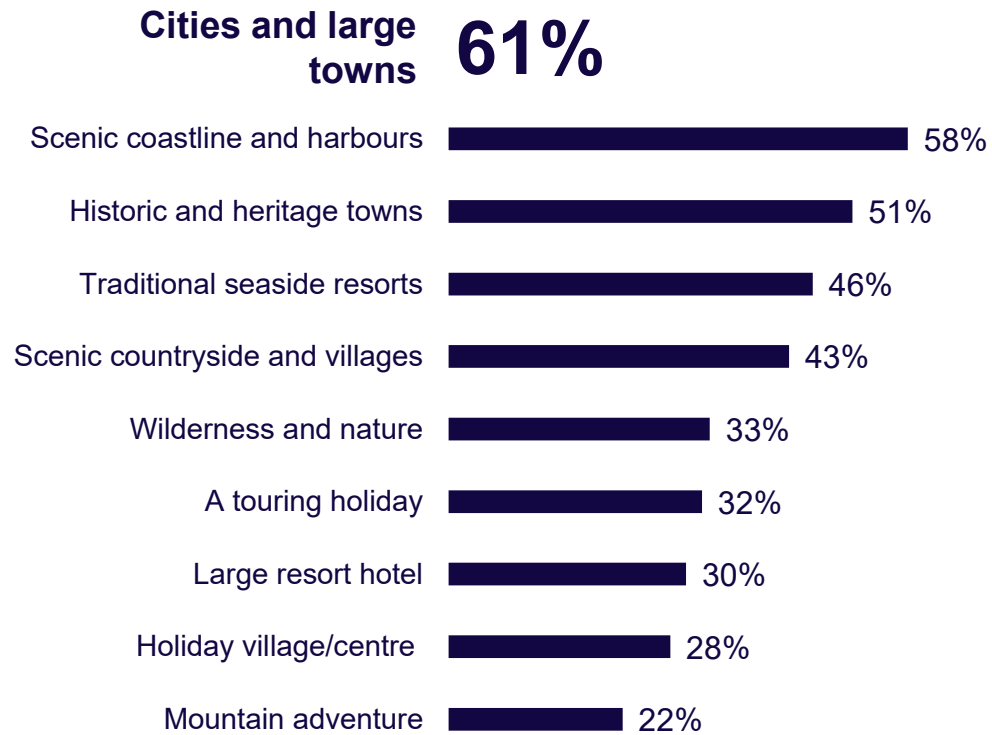
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The top preference for destinations for Irish residents are ‘cities and large towns’, closely followed by ‘scenic coastlines and harbours’.

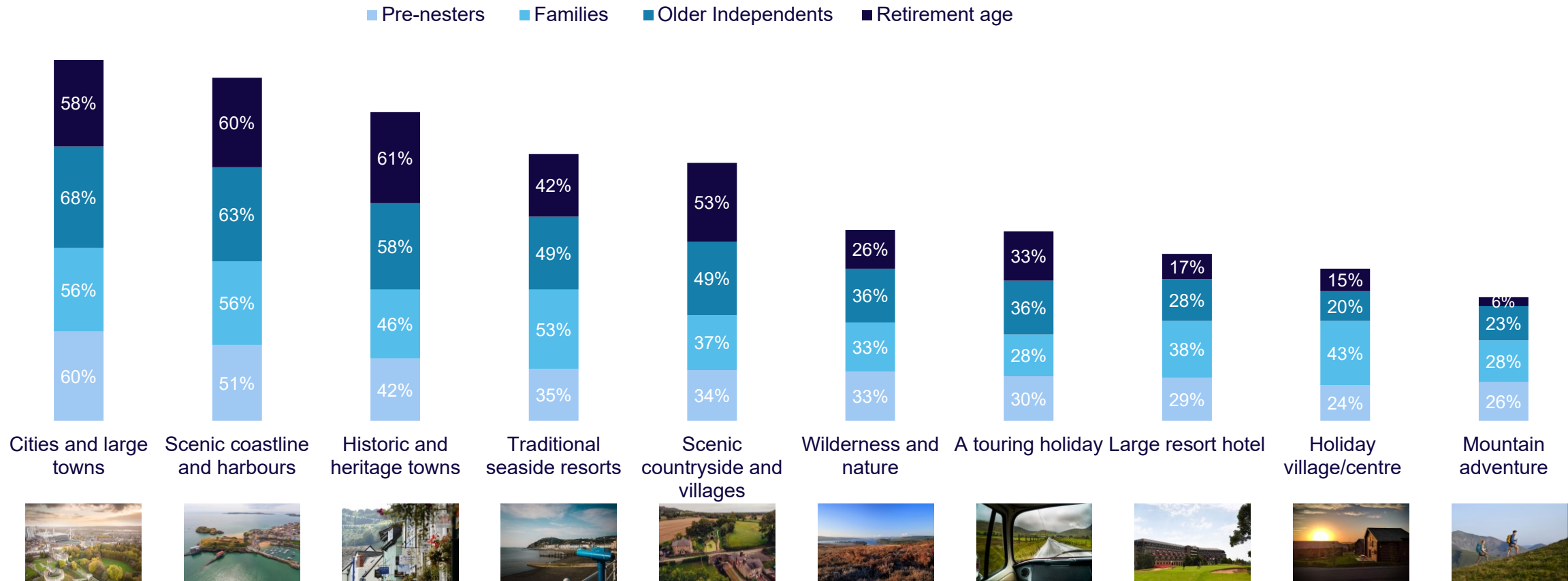
Type of destinations



B1. The images below represent different types of destinations people visit. To which, if any, would you seriously consider taking a short break or holiday in the UK in the next few years? Total base size, n=1000.

‘Scenic countryside and villages’ and ‘historic and heritage towns’ were more popular amongst the older independents and retirement age. ‘Mountain adventure’ and ‘large resort hotel’ is the least popular amongst retirement age. ‘Holiday village/centre’ is more popular amongst families.

Type of destinations, by life stage

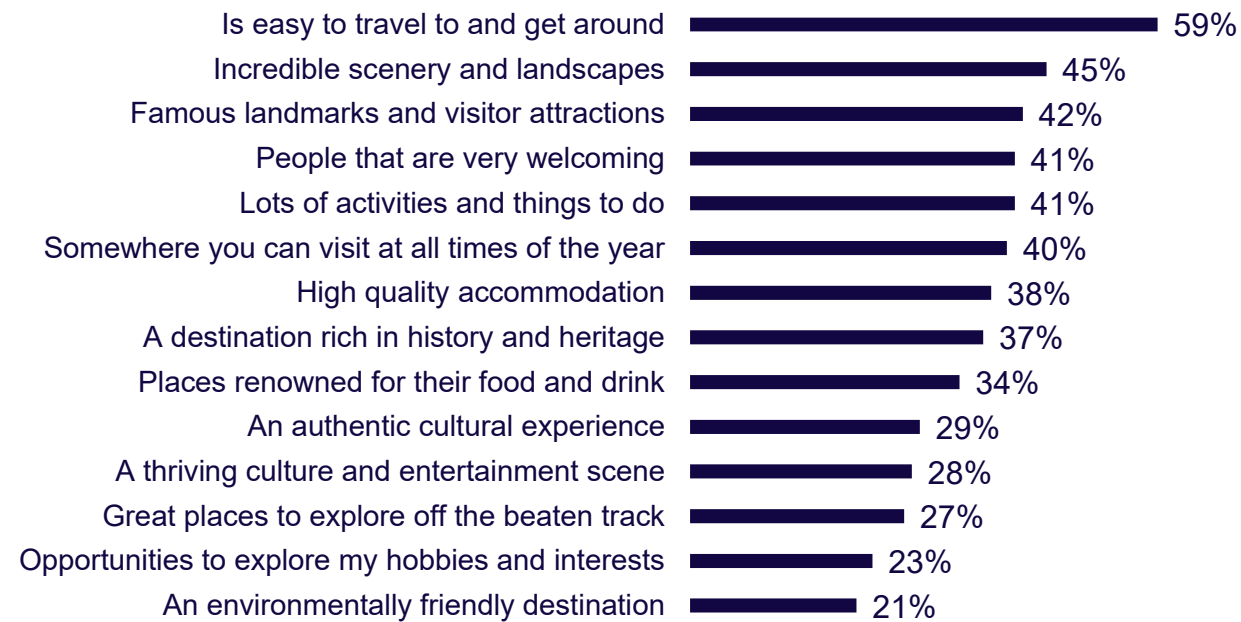


B1. The images below represent different types of destinations people visit. To which, if any, would you seriously consider taking a short break or holiday in the UK in the next few years? Sorted high to low based on average. Total base size, n=1000 (Pre-nesters n=180, Families n=340, Older Independents n=310, Retirement age n=170).

Value for money and travel convenience are the most important drivers for Irish holidaymakers in choosing a short break or holiday.

Destination influences

Great value for money **62%**

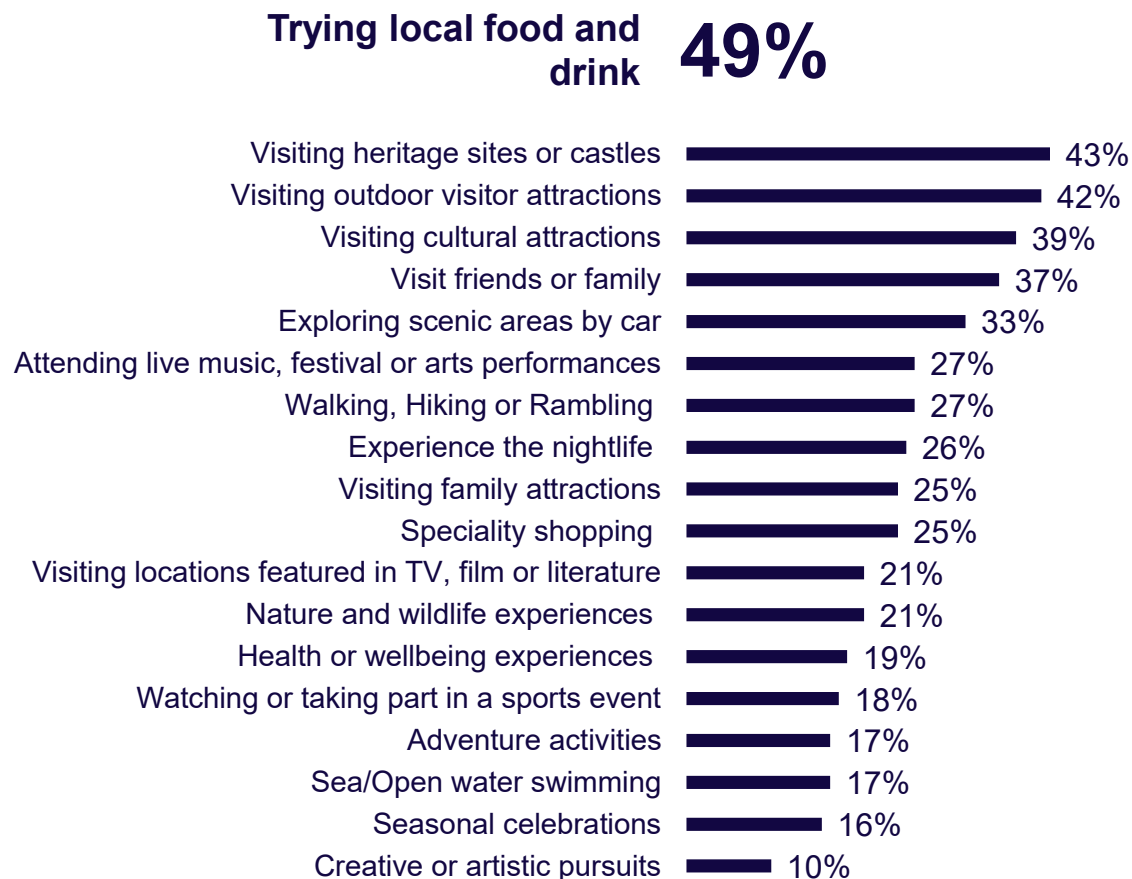


B2. Below is a list of influences people have given for choosing their short break and holiday destinations. Which, if any, are most influential when you think? Total base size, n=1000.



Around half of Irish holiday makers are interested in ‘trying local food and drink’, the most popular holiday experience for a trip to the UK. This is followed by ‘visiting heritage sites or castles’ and ‘outdoor visitor attractions’.

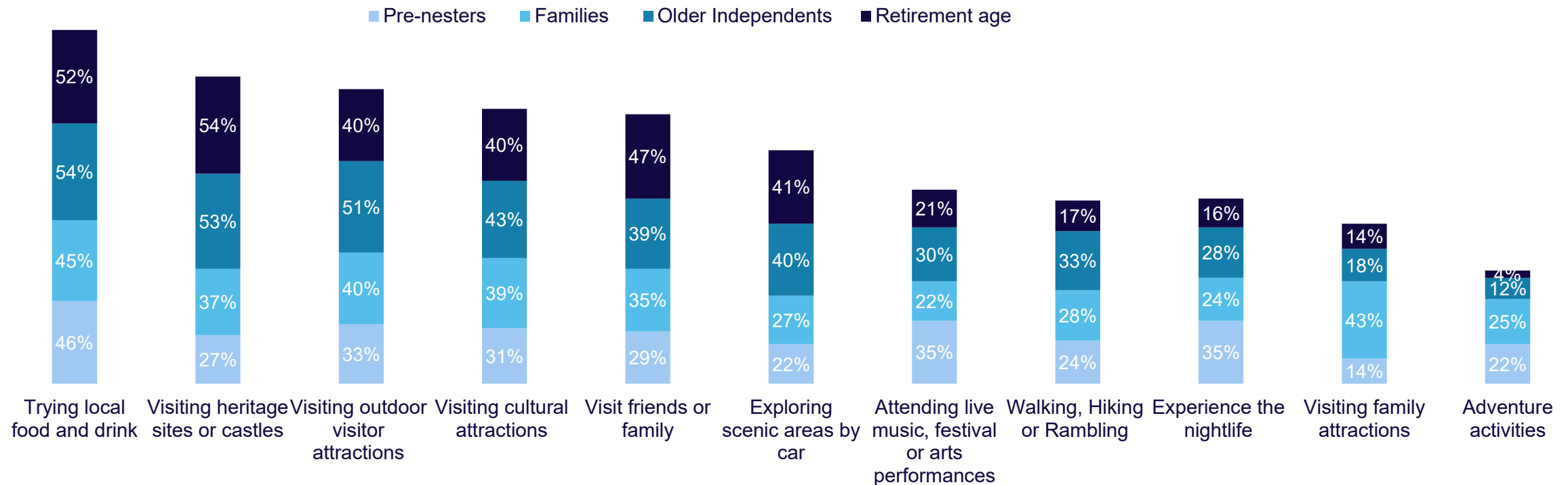
Top experiences, 10% or higher



B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years? Total base size, n=1000.

Nearly half express the greatest interest in ‘trying local food and drink’, an interest that is slightly more pronounced among older independents. Additionally, older independents and retirement age are more likely to favour experiences relating to ‘visiting heritage sites or castles’ and ‘exploring scenic areas by car’, while pre-nesters are more likely to attend live performances and nightlife. Families are more likely to visit family attractions and adventure activities.

Experiences would most like to do (top 11) – by life stage



B3. And which, if any, of these types of experiences would you most like to do on a holiday or short break in the UK in the next few years?
Total base size, n=1000 (Pre-nesters n=180, Families n=340, Older Independents n=310, Retirement age n=170).



Urban appeal leads

Cities and large towns stand out as top preferences for Irish holidaymakers, with a penchant for vibrant urban experiences.

Value and convenience key

Irish tourists prioritise convenience, ease, and value when selecting a holiday, indicating a preference for hassle-free travel experiences.

Cultural and culinary explorations

Half of Irish holidaymakers' express interest in exploring local cuisine and heritage sites, emphasising a desire for authentic cultural experiences.

WALES VISITATION 2023



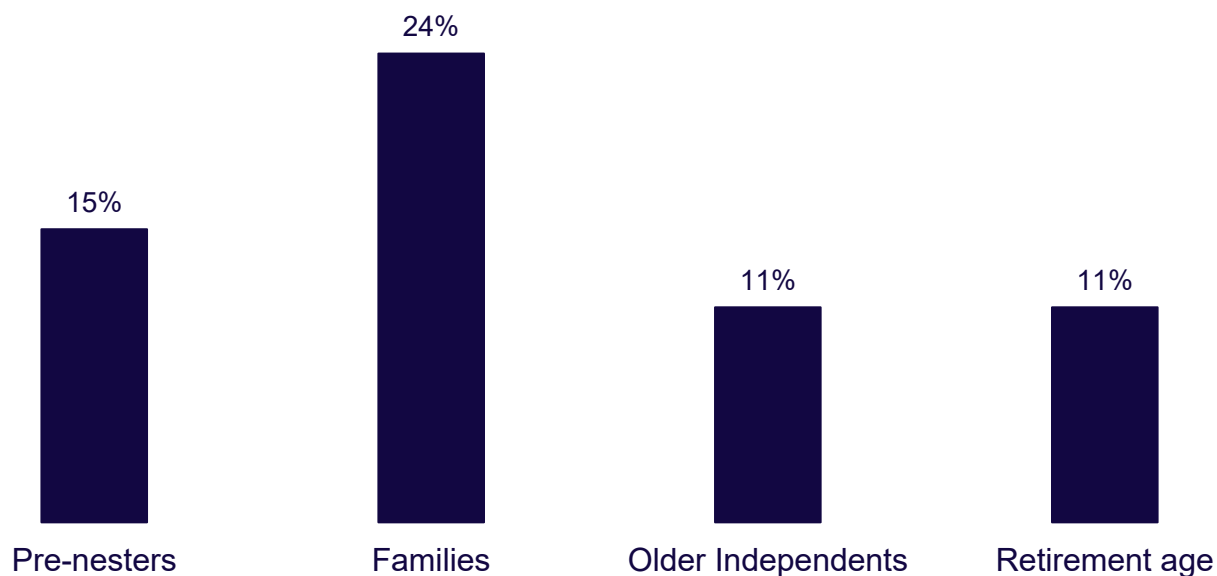
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In total, 16% took a short break or holiday in Wales in 2023, which is consistent with 2022. Families were most likely to have visited Wales, with around a quarter having done so.

Took a short break or holiday in Wales in 2023 ('Yes')



How many short breaks or holiday (average in 2023)

1.71 short breaks (1-3 nights)

1.52 holidays (4+ nights)

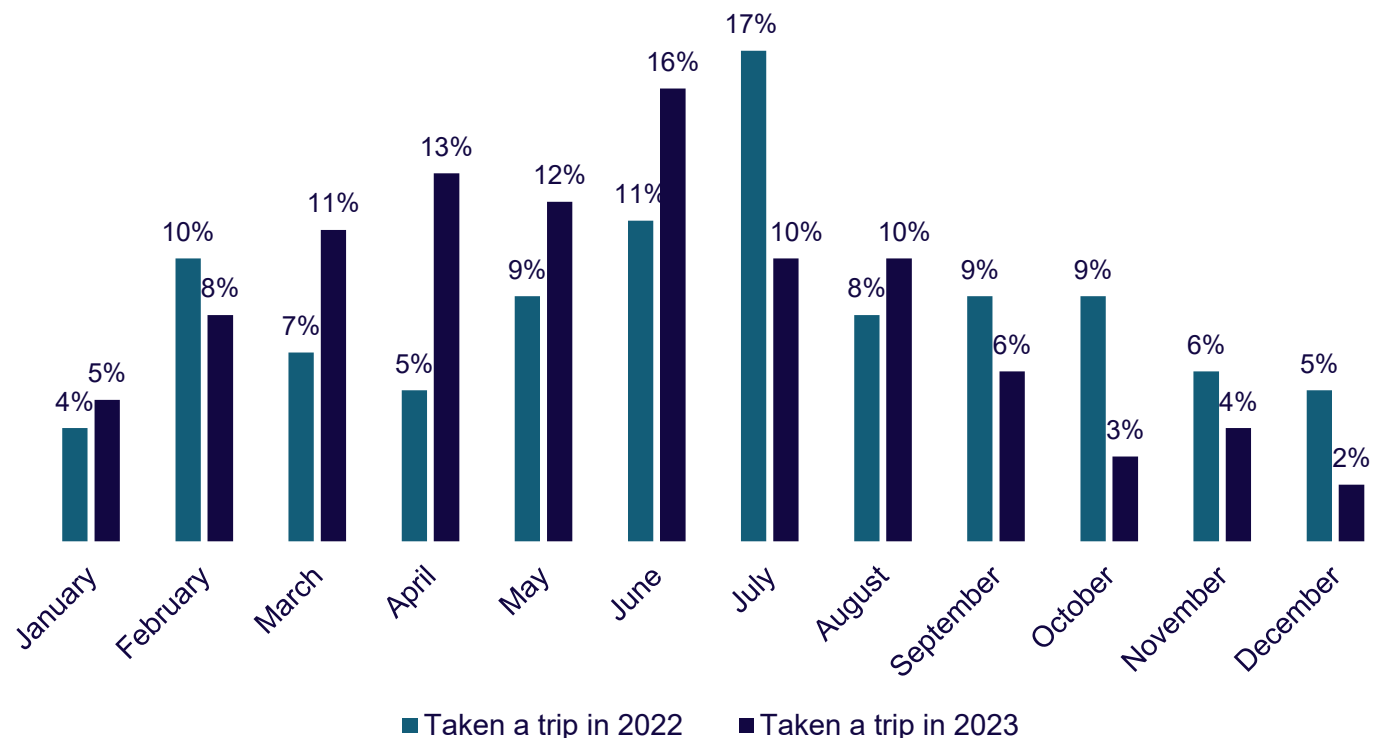
D1. Did you take a short break or holiday in Wales in 2023? Total base size, n=1000.

D2. How many short breaks or holidays did you take in Wales in 2023? Wales 2023 trip takers, n=162.



More 2022 Wales trip takers visited in July, while spring and early summer (June) were more popular for 2023 trip takers.

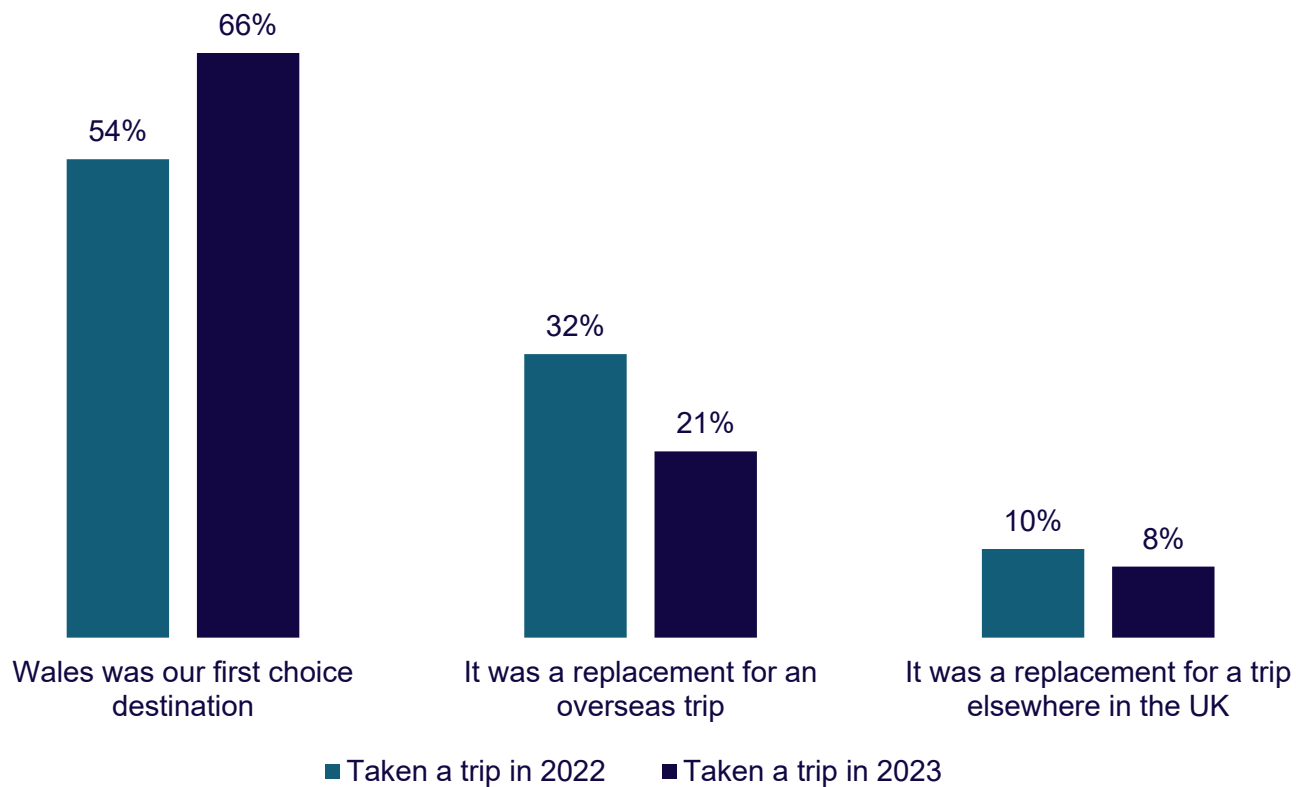
Months taken a trip to Wales in 2022 vs 2023



D3. And in which months of the year did you visit for a short break or holiday in 2023?
Wales trip takers, n=96 (taken a trip in 2022), n=162 (taken a trip in 2023).

Two-thirds of those who took a holiday or short break in Wales stated that Wales was their first choice, up compared to 2022 visitors.

Wales as a first-choice destination

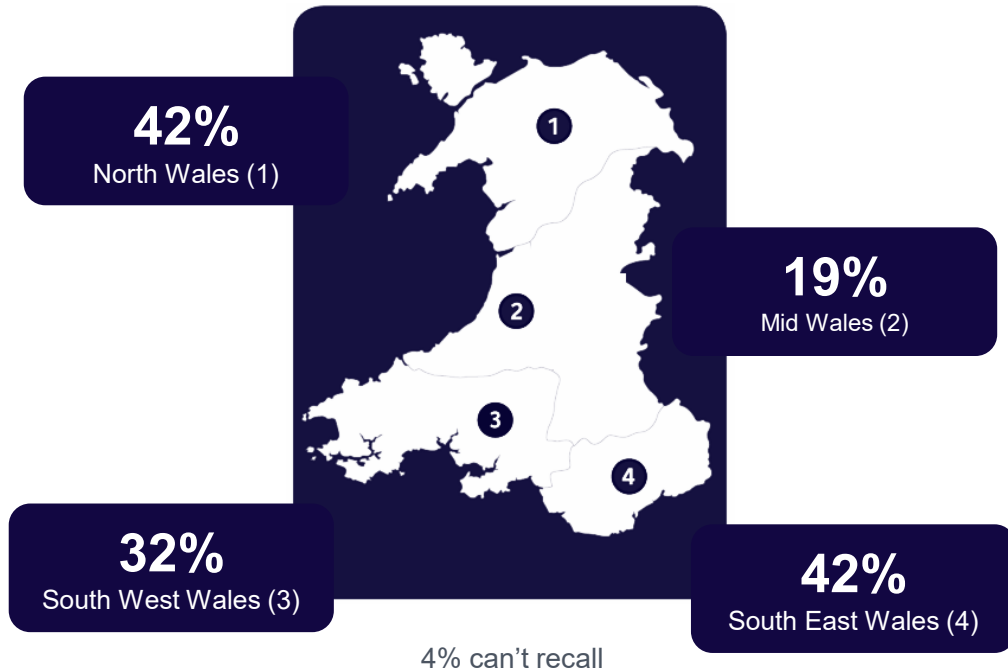


D4. Which, if any, of these statements best apply to your trip in Wales in 2023?
Wales trip takers, n=96 (taken a trip in 2022), n=162 (taken a trip in 2023).

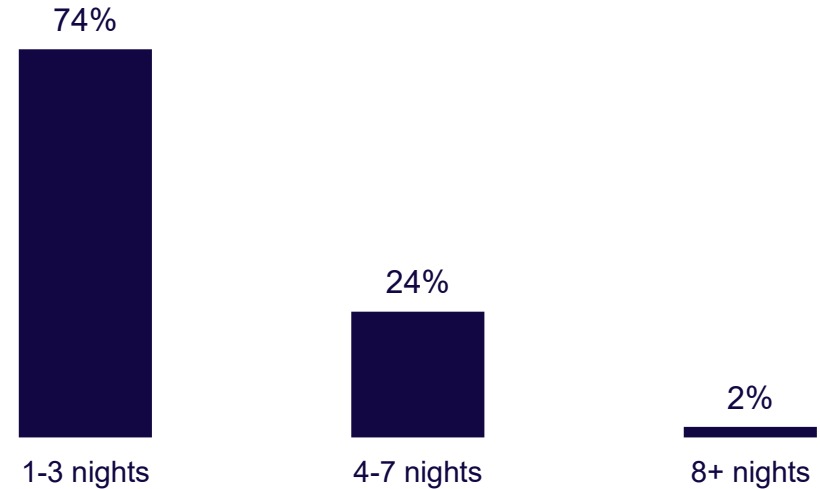


South East and North Wales were the most popular destinations for Irish holidaymakers who visited Wales. The vast majority favoured short stays.

Where in Wales did you stay?



Number of nights stayed in Wales in 2023



D6. Where in Wales did you stay overnight on this trip in 2023?

D8. On this trip to/within Wales in 2023, how many nights did you stay away for? Wales 2023 trip takers, n=162.

The overwhelming majority of UK visitors to Wales in 2023 travelled with at least one another person. 67% travelled with their partner and only a small minority took the trip alone.

Visitor party make-up for Wales in 2023

Your partner **67%**

Your children 34%

Friend/s 18%

Your grandchildren 7%

Your parents or your partner's parents 7%

Other members of your family 7%

On your own / alone 3%

Colleagues 2%

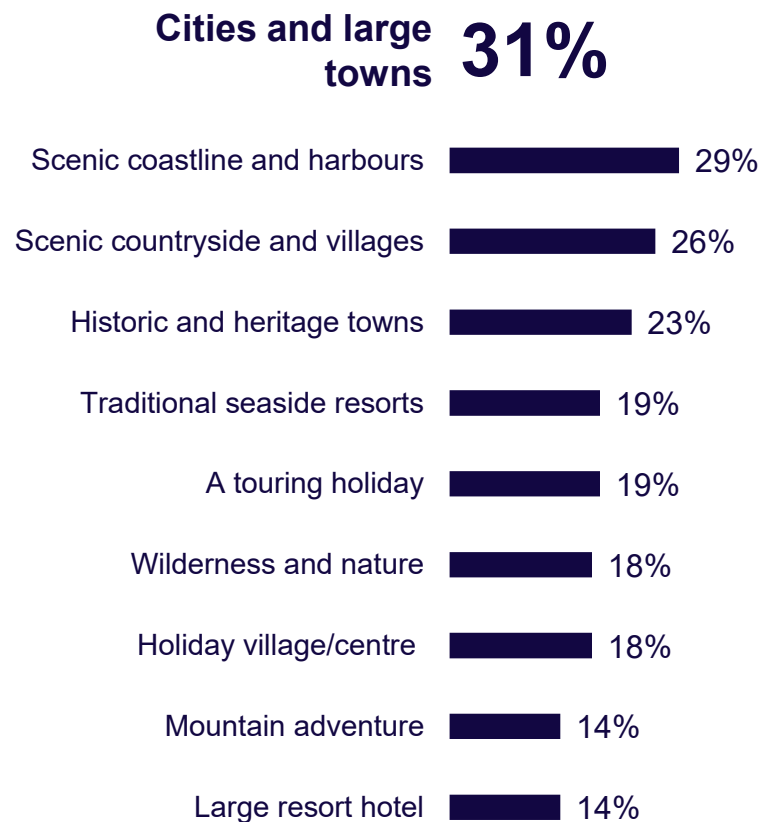
Members of an organised group 1%

Dogs 1%



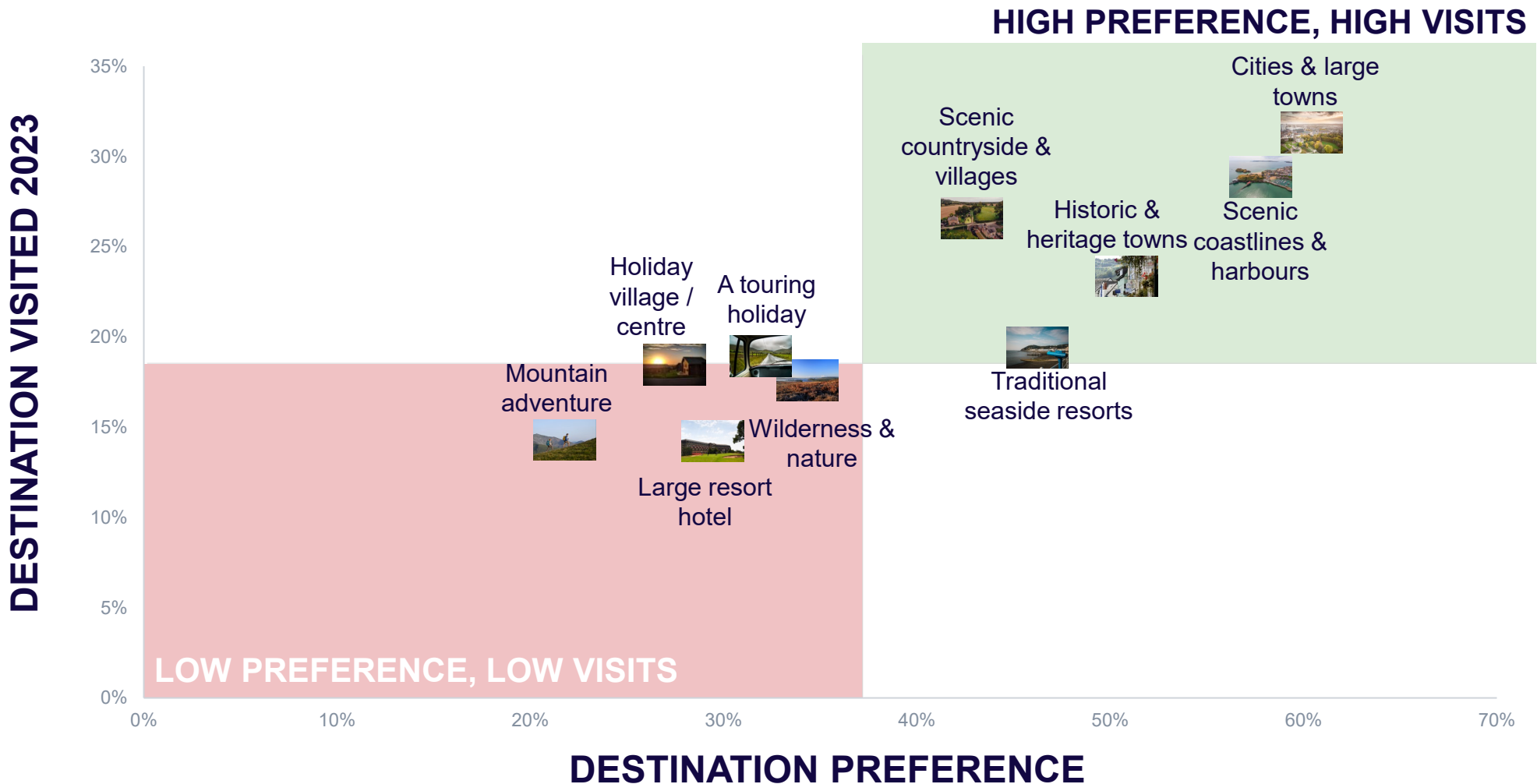
The type of destinations visited in Wales in 2023 broadly aligns with the destination preferences of the Irish holiday market. ‘Cities and large towns’ lead the way on both preferences and destinations visited, followed by ‘scenic coastlines and harbours’.

Type of destinations



D5. Which of the following best describes the main type/s of destination you stayed in during this trip in Wales in 2023? Wales 2023 trip takers, n=162.

The type of destinations that Irish holiday makers visited in Wales in 2023 aligns with their destination preferences. ‘Cities and large towns’ lead the way on both, followed by ‘scenic coastlines and harbours’.



B1. The images below represent different types of destinations people visit. To which, if any, of these are you seriously considering taking a short break or holiday in the UK in the next few years?
Total base size, n=1000.

D5. Which of the following best describes the main type/s of destination you stayed in during this trip in Wales in <INSERT MONTH>? Wales 2023 trip takers, n=162.

Family-friendly escapes

Wales is regarded as a family-friendly destination, with a quarter of families choosing it for short breaks or holidays. In fact, in 2023, families were more than twice as likely to visit Wales compared to older independents and those in the retirement age group.

Seasonal trends

2023 sees a shift towards spring and early summer, reflecting evolving travel patterns.

Time with loved ones

South East and North Wales emerge as hotspots for Irish tourists, who had a strong preference for short stays with their partners and families.

LIKELY TO VISIT WALES IN 2024



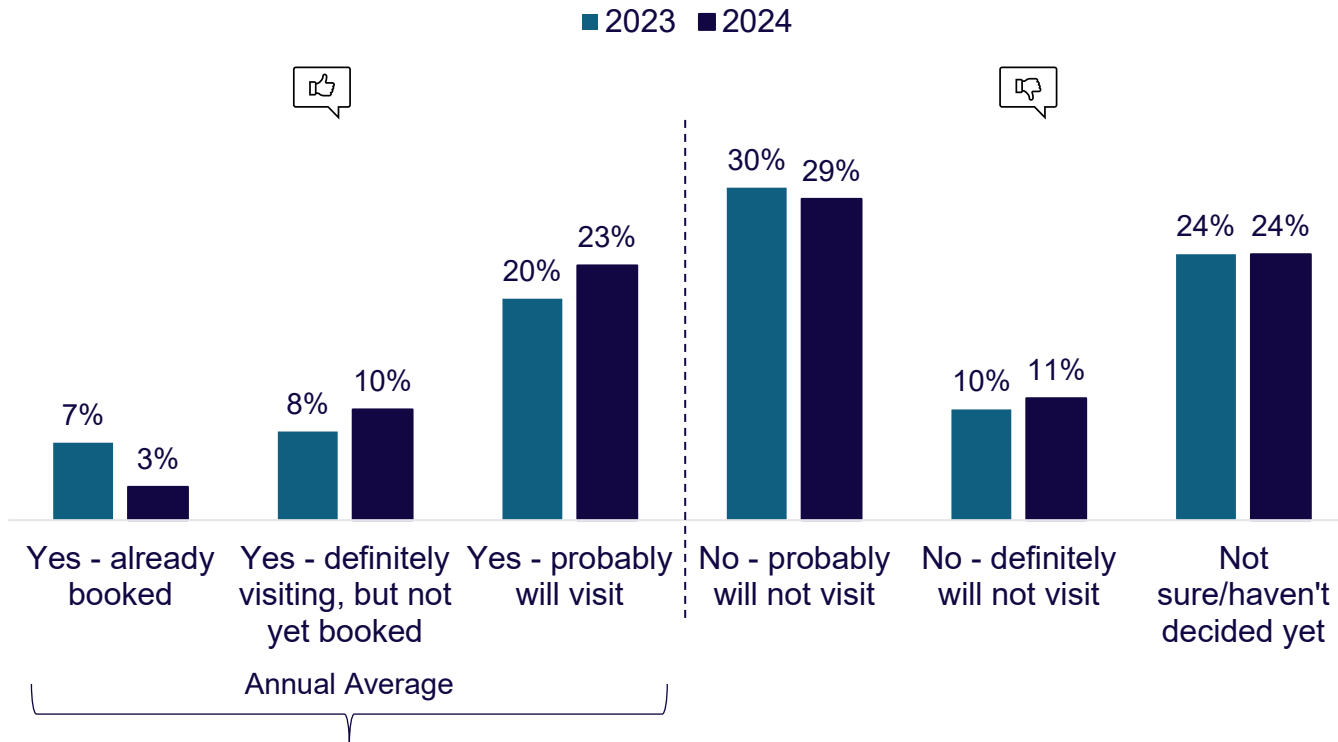
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Around a third stated that they intend to visit Wales in 2024, comparable to last year. On average, those who intend to visit in 2024 plan to take 1.51 short breaks (1-3 nights) or 1.38 holidays (4+ nights) to Wales throughout the year.

Intending to visit Wales in 2024



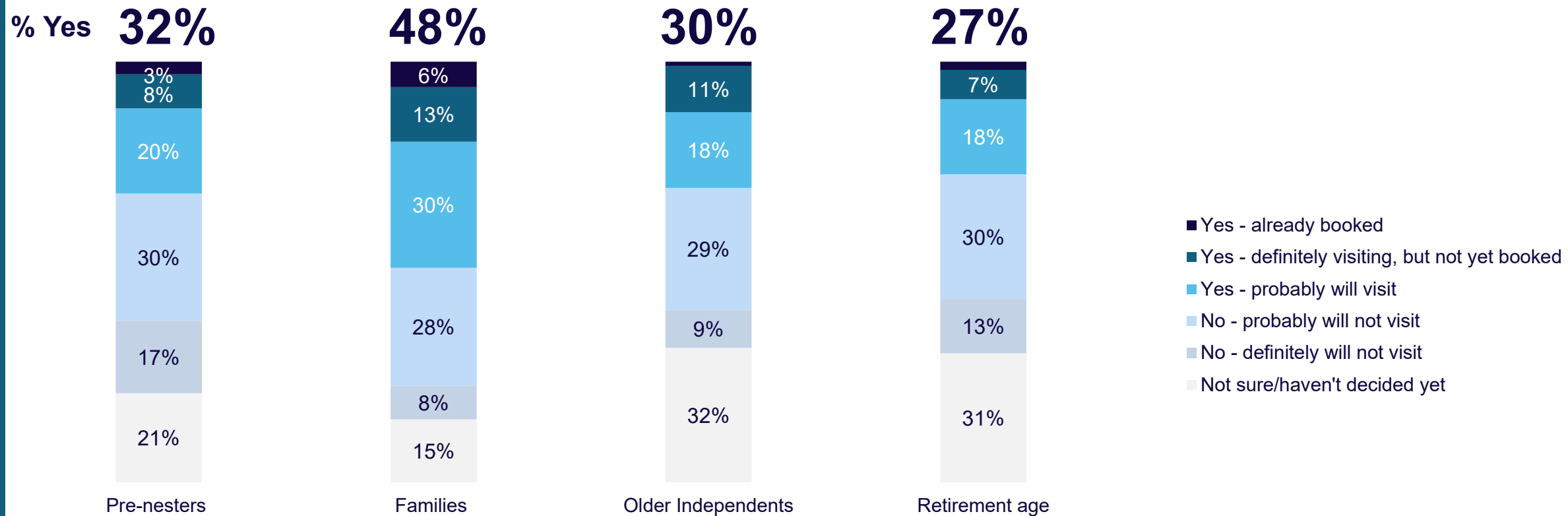
1.51 intended 2024 short breaks on average
1.38 intended 2024 holidays per year on average

F1. Are you intending to take a short break or holiday in Wales in 2024? Total base size, n=599 (2023), n=1000 (2024).
 F2. Roughly how many short breaks or holidays do you plan on taking in Wales in 2024? Wales trip intenders 2024, n=360.



Families make up nearly half (48%) of Wales 2024 trip intenders and are more likely than other life stages to visit. Older independents and retirement age are more unsure/undecided.

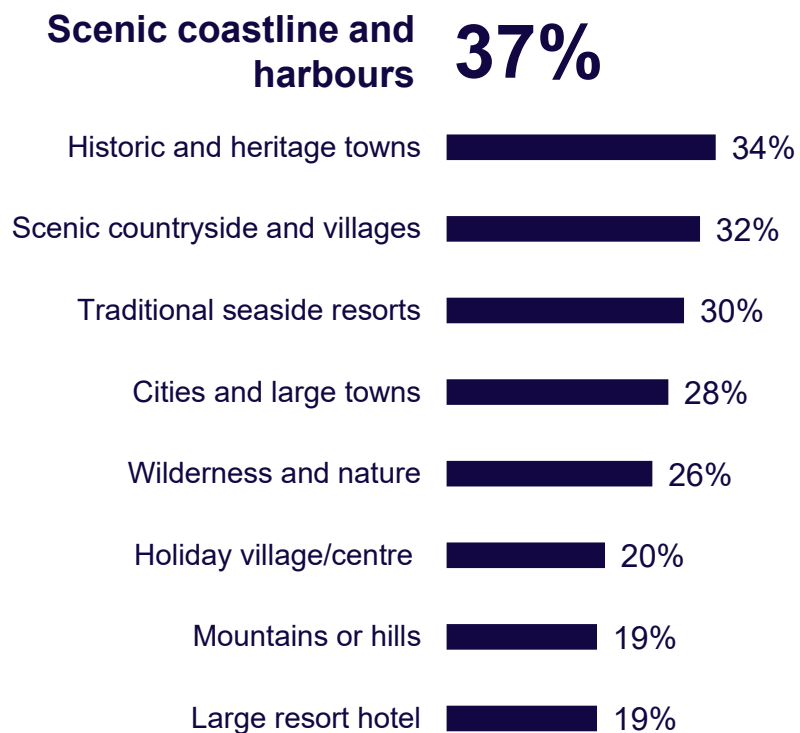
Intending to visit Wales in 2024, by life stage



F1. Are you intending to take a short break or holiday in Wales in 2024? Total base size, n=1000 (Pre-nesters n=180, Families n=340, Older Independents n=310, Retirement age n=170).

There is a notable spread of potential destination types amongst 2024 intenders, the most popular of which is coastal and harbour.

Type of destination of those intending to take a trip in Wales in 2024



F8. Which of the following best describes the main types of destination you are likely to stay in during your next short break or holiday in Wales in 2024? Wales trip intenders 2024, n=360.

Among those intending to take a trip in Wales in 2024, food, heritage, visitor and cultural attractions are heading up trip intenders' itineraries.

Top activities (>10%) of those intending to take a trip in Wales in 2024



F9. Which, if any, of these activities are you likely to do on your next short break or holiday in Wales in 2024? Wales trip intenders 2024, n=360.



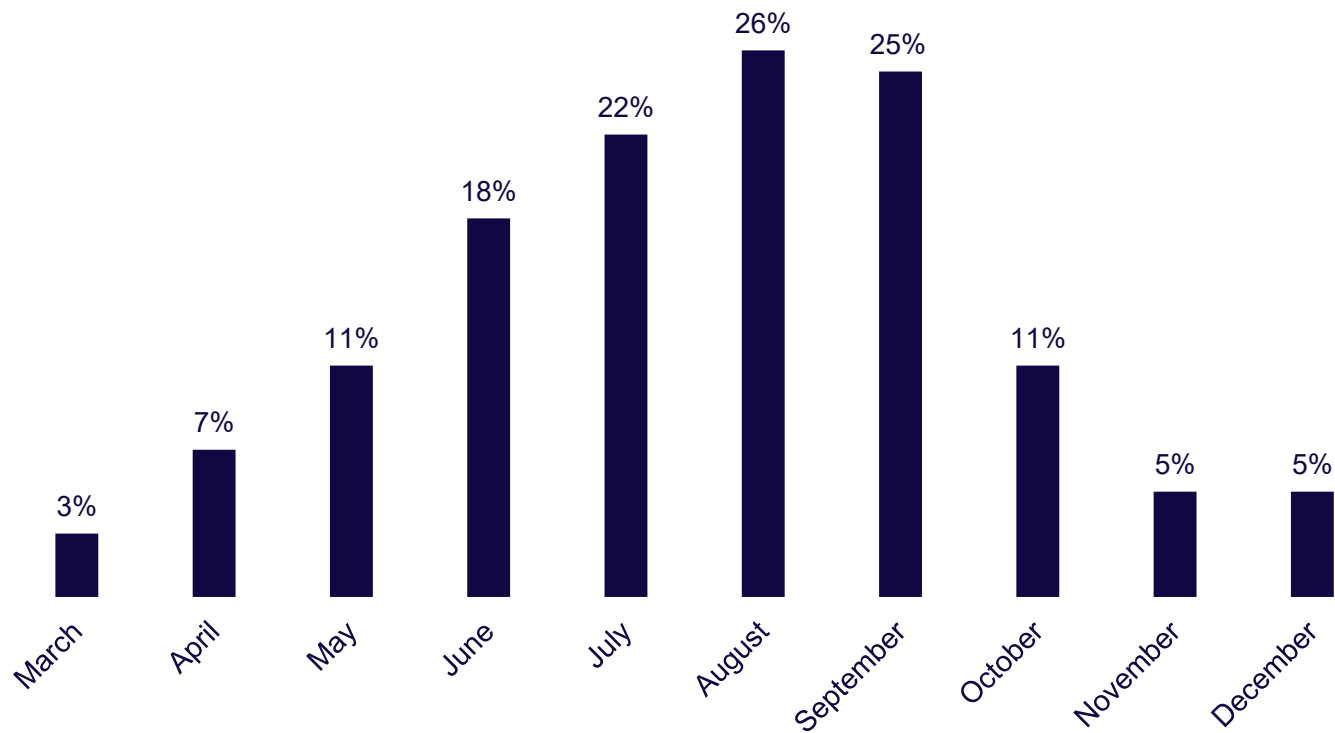
In line with the top activity of 'trying local food and drink', there is strong interest in 'food and drink festival' (60%). There is, however, a notable spread of events and activities that are of interest to 2024 trip intenders.

Interested in festivals/events of those intending to take a trip in Wales in 2024



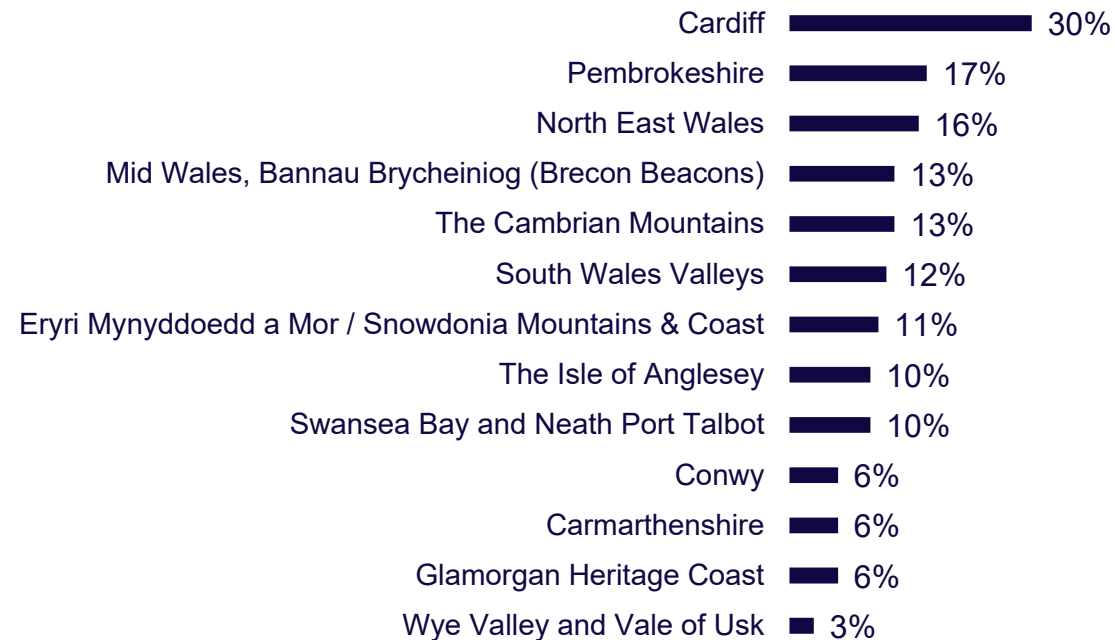
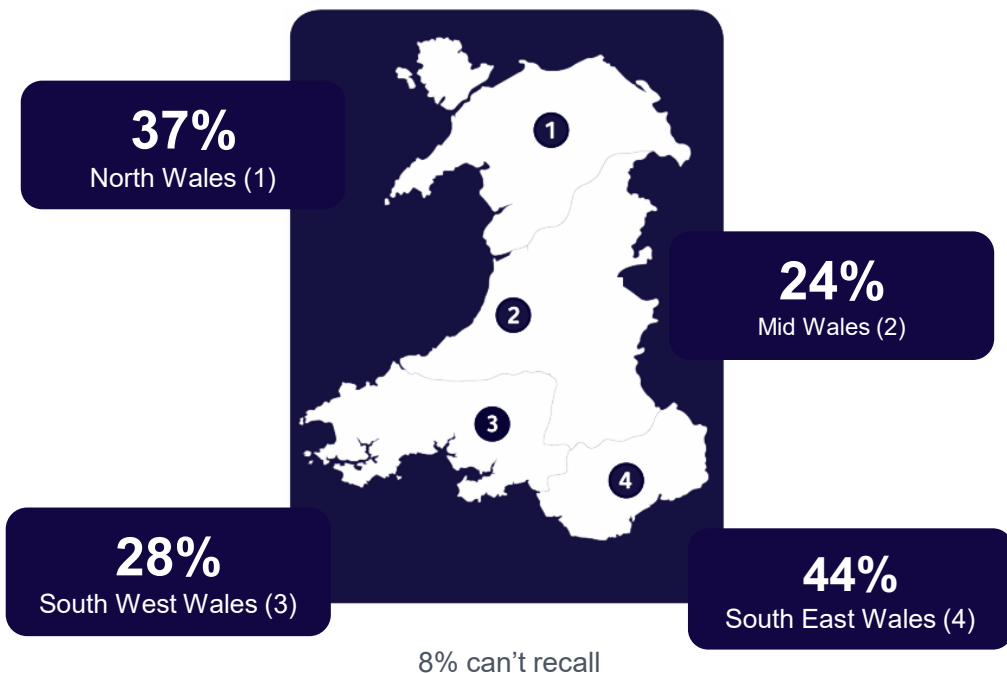
Most are planning to take their short break or holiday in Wales in 2024 in the summer months (July-September).

Planned month(s) visiting Wales in 2024



The majority of intenders are likely to stay overnight in South East Wales (particularly Cardiff), followed by North Wales.

Where in Wales do you plan to stay?



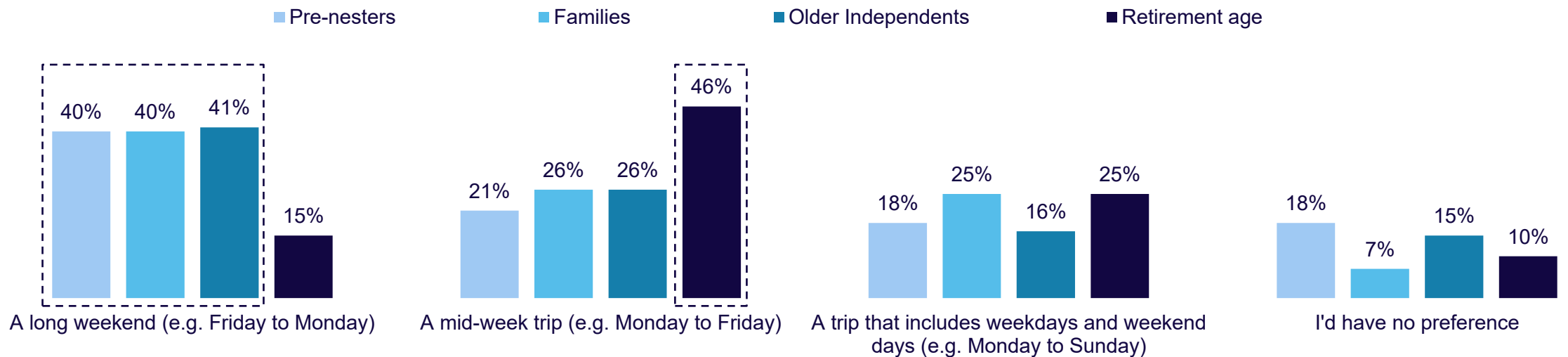
The most common trip type to Wales amongst Irish trip intenders was to spend a long weekend.

Time of week intending to take a trip in Wales in 2024



However, just 15% of retirement age prefer a long weekend. Those of retirement age show a higher inclination towards a mid-week trip, with 46% opting for it.

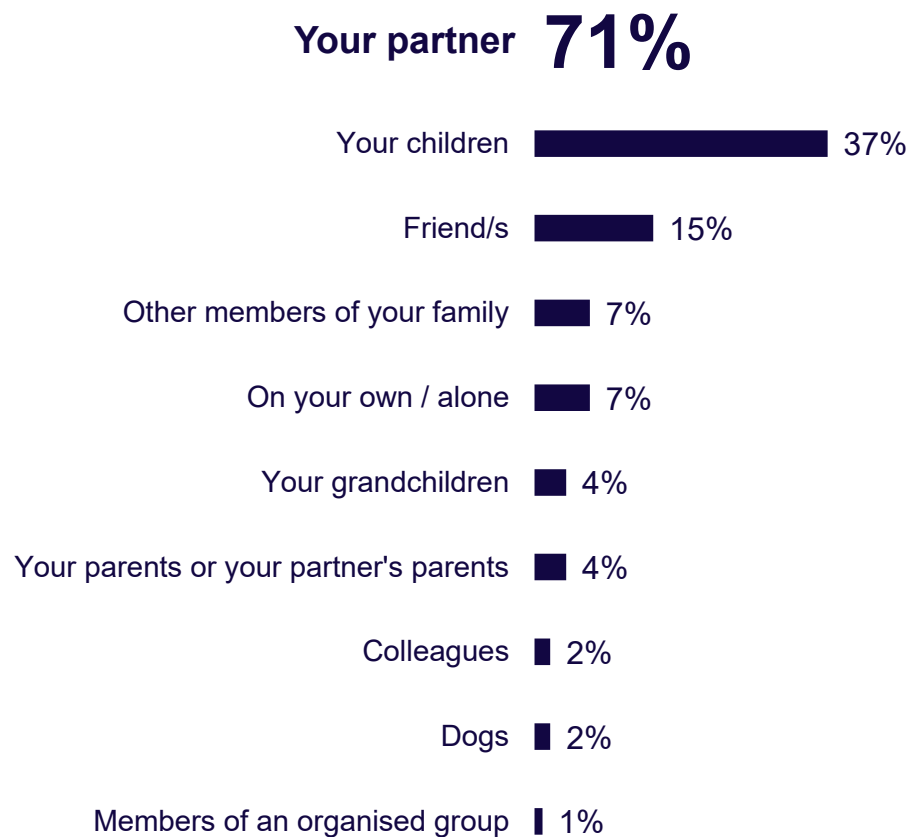
Time of week intending to take a trip in Wales in 2024, by life stage



F5. Which time/s of week would you be most likely to take your next short break or holiday in Wales in 2024?
Wales trip intenders 2024, n=360 (Pre-nesters n=67, Families n=164, Older Independents n=81, Retirement age n=48*). *low base size

Similar to 2023 Wales trip takers, 2024 trip intenders would most likely spend their next short break or holiday in Wales with their partner.

Visitor party make-up for Wales in 2024



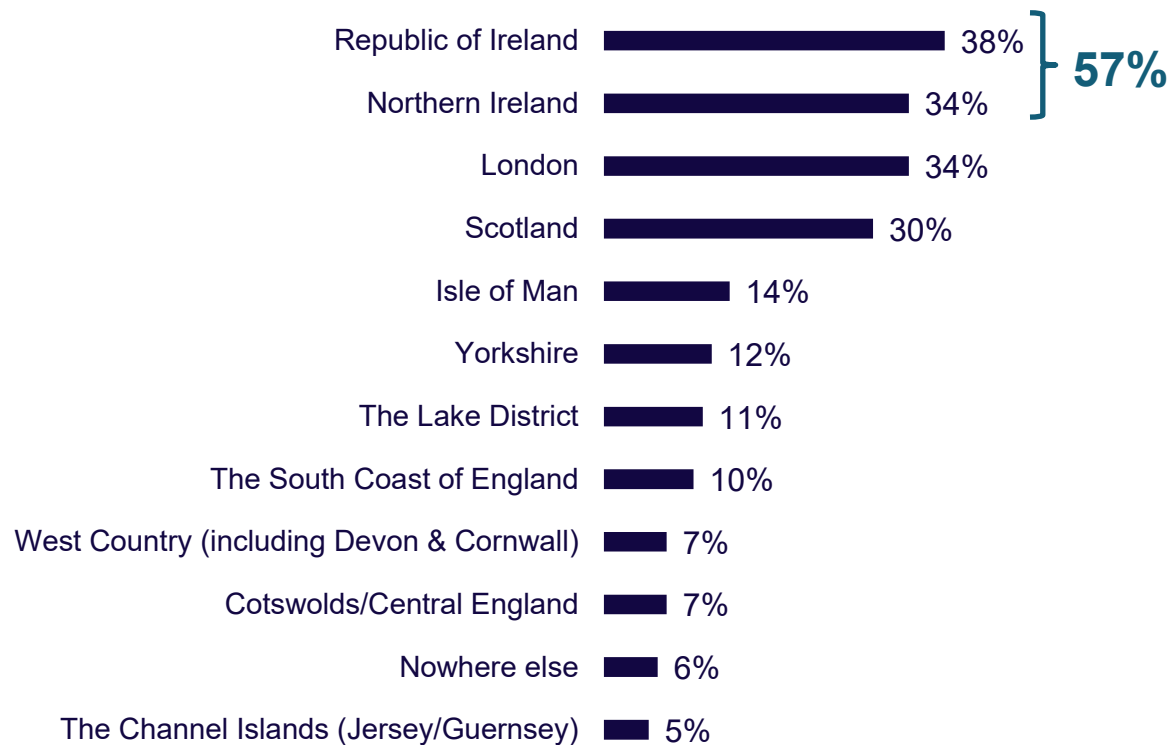
Trip-takers to Wales are likely to use a range of sources to plan their 2024 trip. Word of mouth and online and social media resources are the most commonly used. 28% used the Visit Wales social media page.

Sources of information used/likely to use to plan trip to Wales in 2024



A noteworthy number of trip intenders (94%) are also considering other locations in the UK and Ireland, suggesting strong domestic competition for potential Irish visitors.

UK and Ireland locations considered for visiting in 2024



F12. Where else, if anywhere, in the UK and Ireland are you seriously considering visiting for a holiday or short break in the next 12 months? Wales trip intenders 2024, n=360.





Welsh appeal

Around a third of Irish holidaymakers plan to visit Wales in 2024, with many already booking or planning trips, primarily during the summer months.

Culinary and cultural experiences top itineraries

Those intending to visit Wales are keen on exploring coastal and harbour destinations, with considerable interest in trying local food and drink.

Strong competition

A considerable proportion of those considering a trip to Wales are also exploring other UK and Ireland locations, indicating a competitive travel environment.

VISIT WALES MARKETING IMPACT



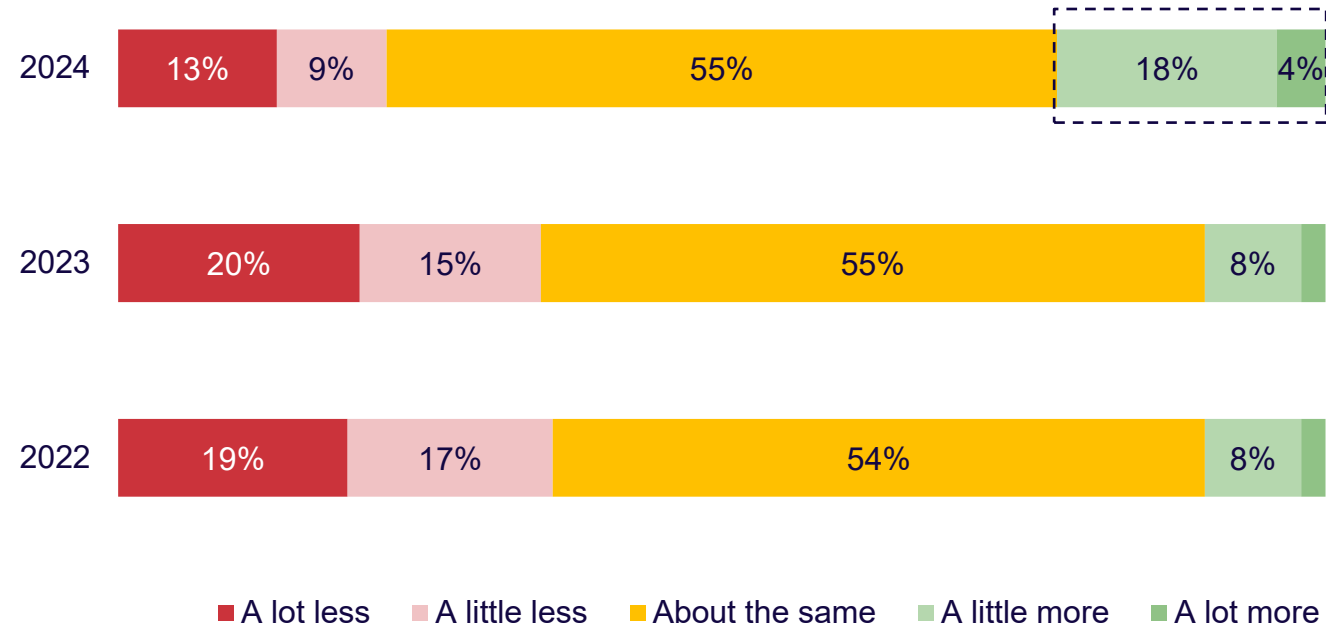
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A higher proportion of the Irish holiday market have heard Wales talked about as a place to visit 'a little' or 'a lot more' in 2024, compared to previous years.

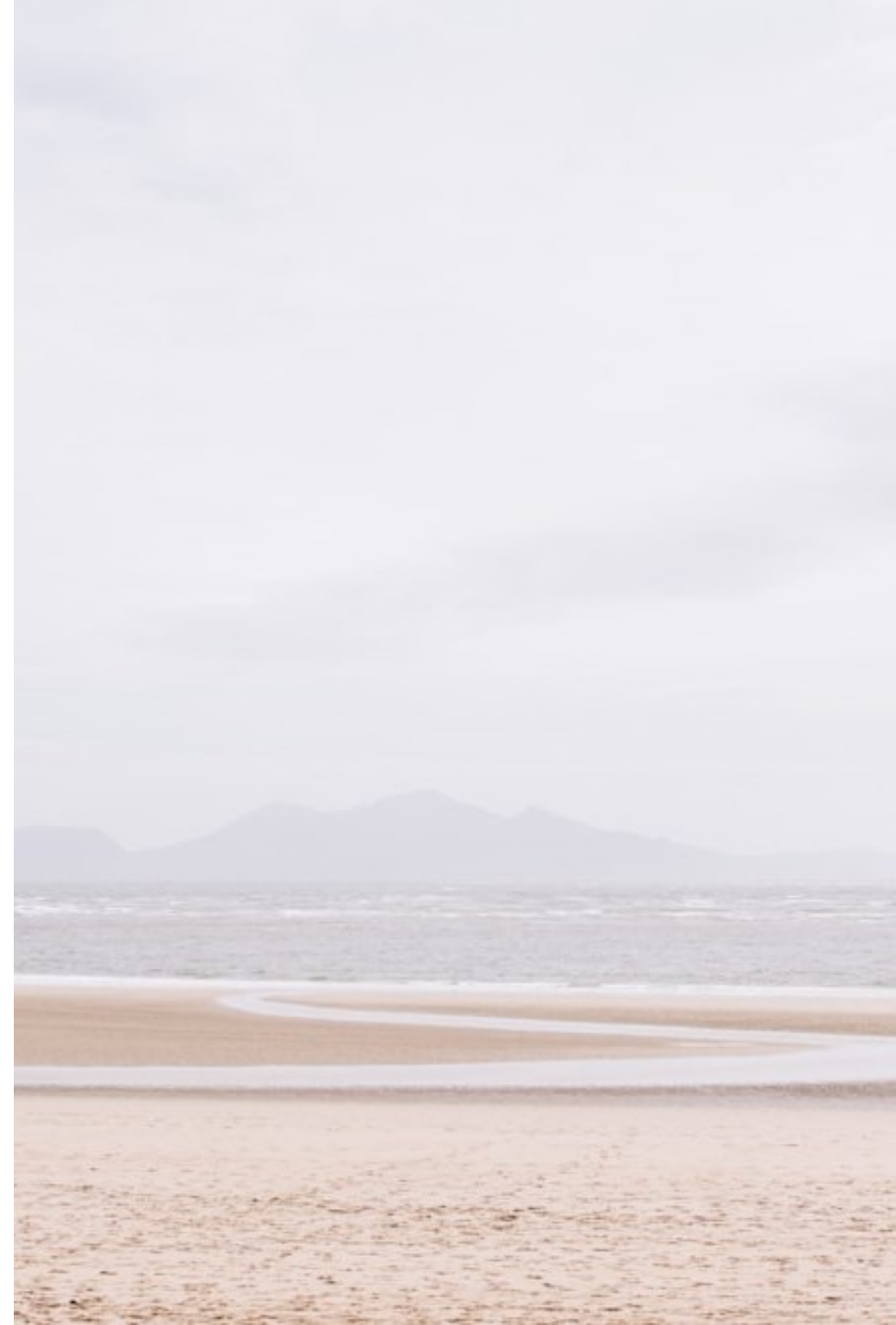
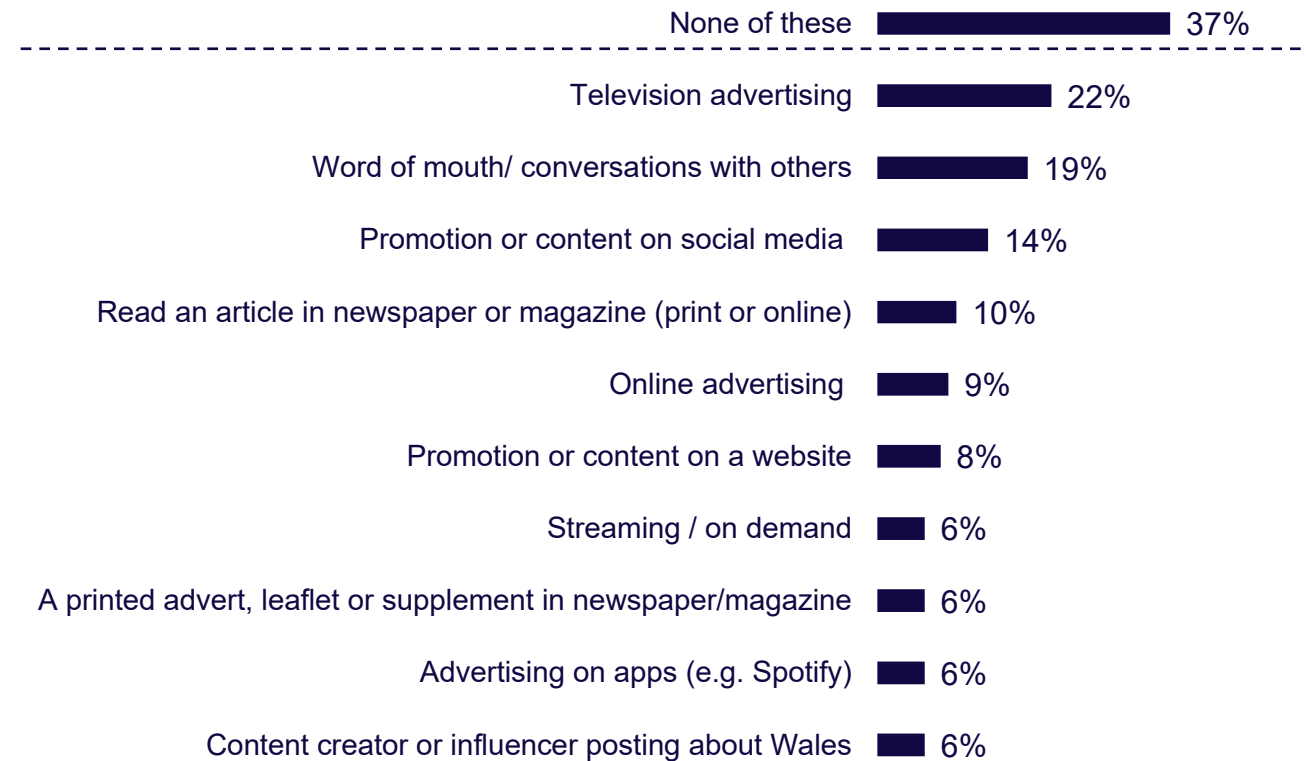
Heard Wales talked about as a place to visit



H1. Compared to normal, how much have you heard Wales talked about as a place to visit over the last 3 months?
Total base size, n=1000.

Around two-thirds of the Irish holiday market have seen or heard about Wales via at least one source in the last few months. TV advertising is the leading source, followed closely by word of mouth, and social media.

Seen or heard about holidays in Wales



Both advertisements had a similar level of recall, with 38% having said they could recall seeing each in the last few months.

38% stated they have seen the TV ADVERT

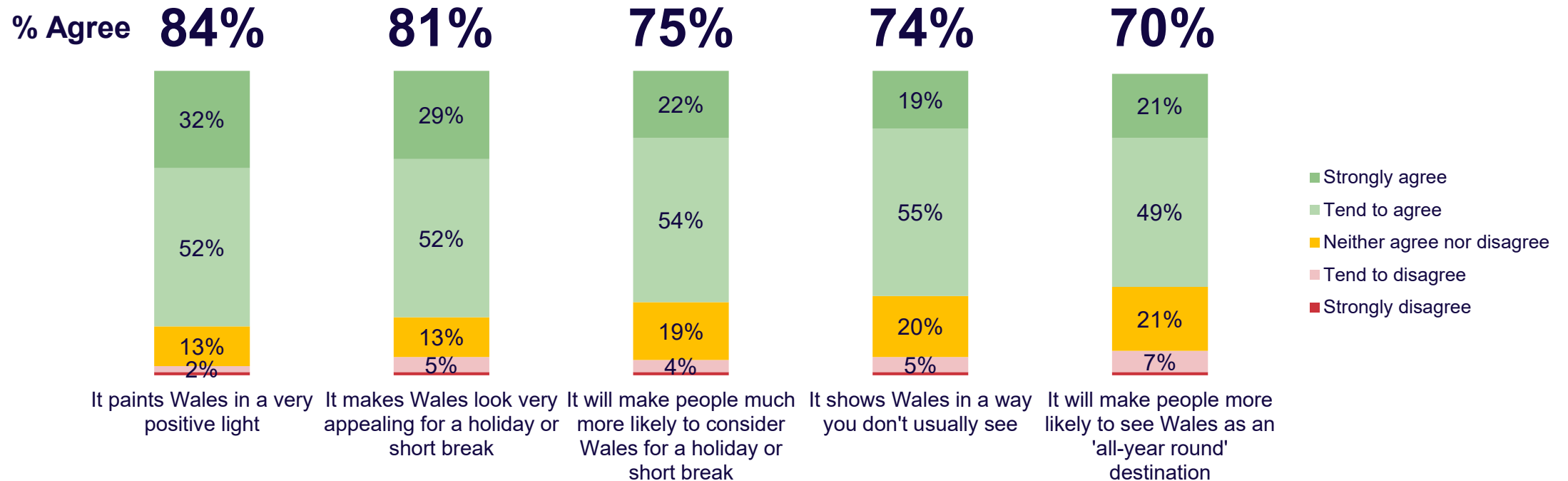


38% stated they have seen the Digital Vignette



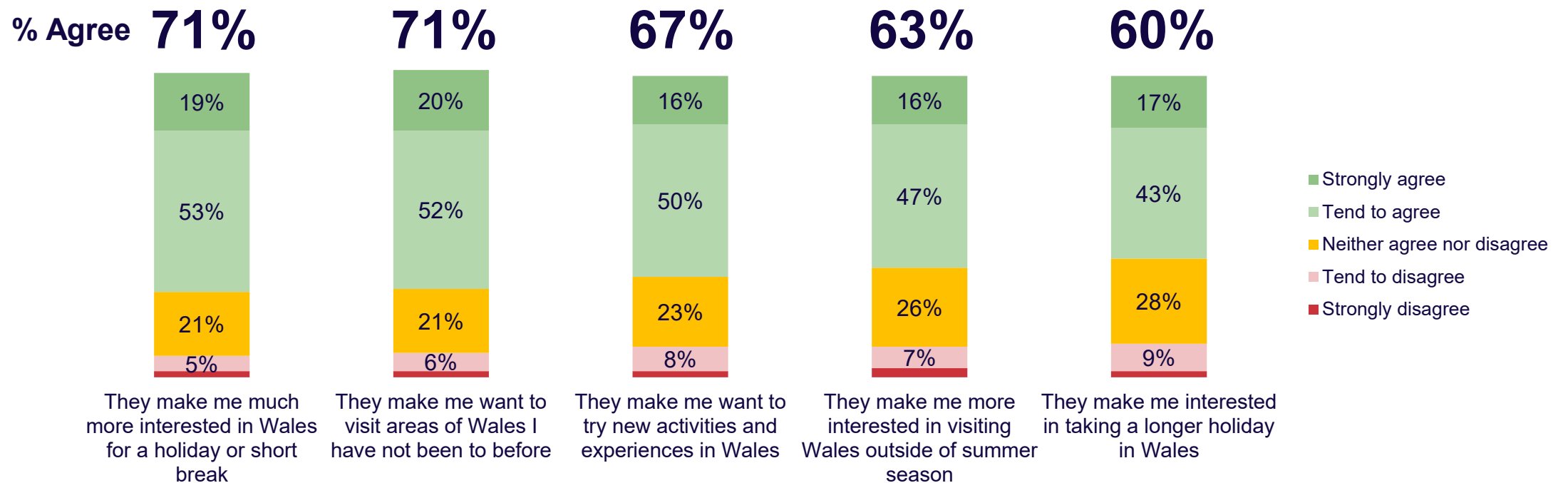
Perceptions of the films were broadly positive, with a notable majority agreeing that they ‘paint Wales in a very positive light’ (84%) and ‘makes Wales look very appealing’ (81%).

Perceptions of films overall



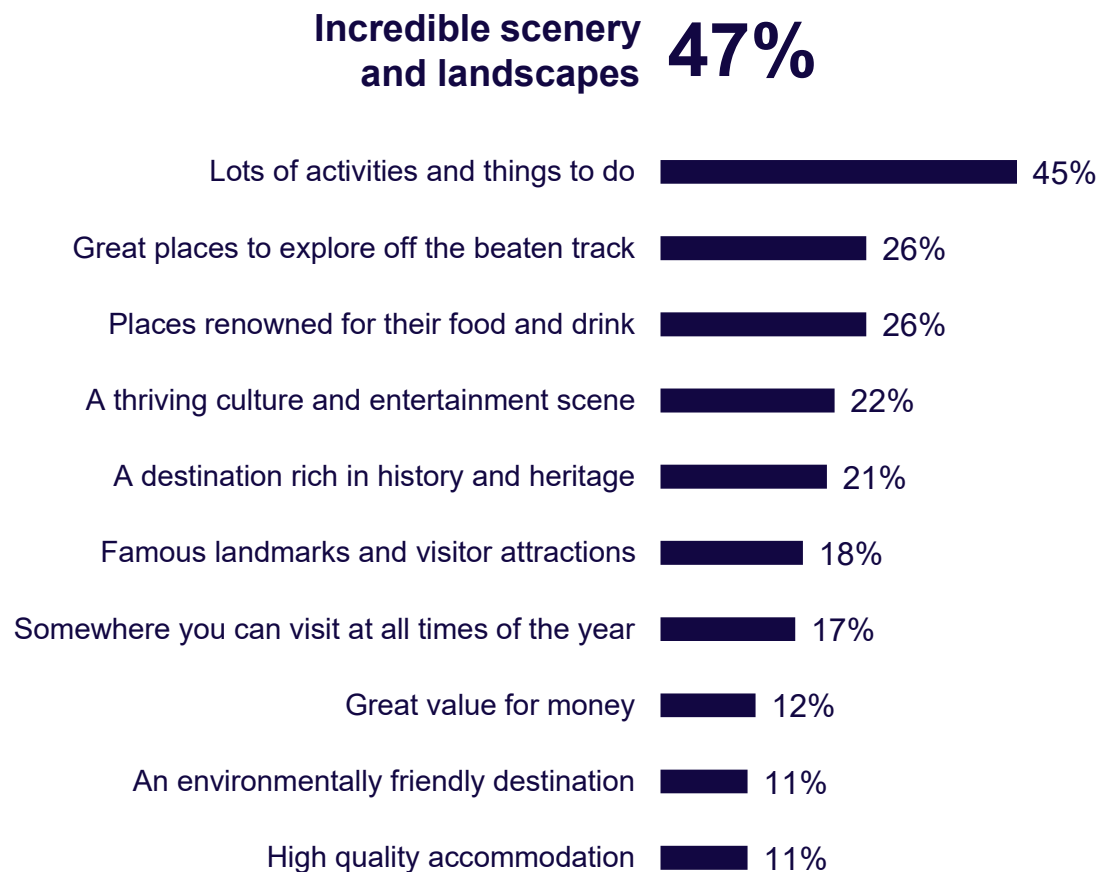
A notable majority also agrees that the campaign makes them ‘more interested in Wales’ (71%) and a similar proportion agreed that they want to visit areas of Wales they have not been to before.

Perceptions of films overall

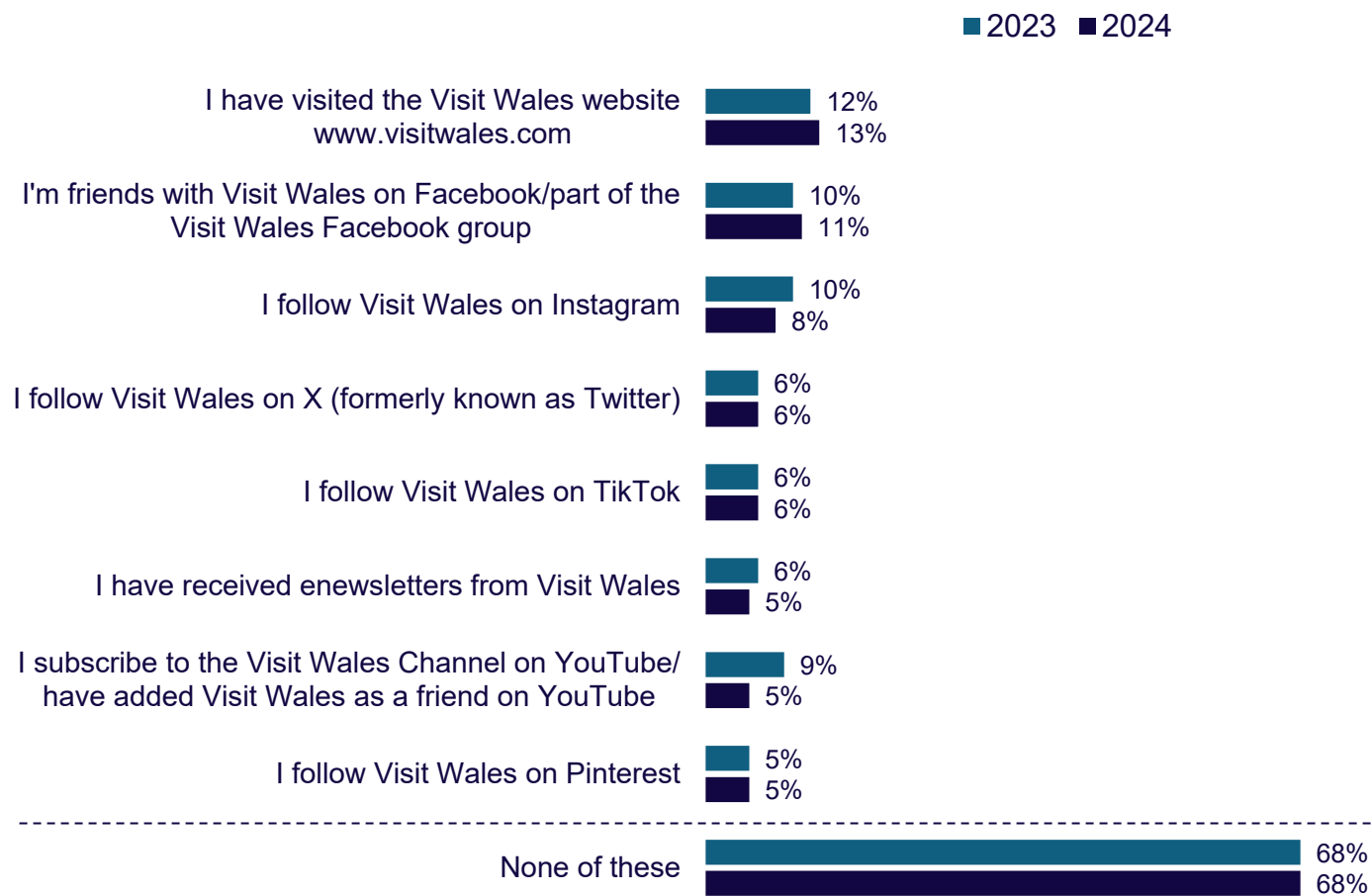


The advertisements scored highly for communicating ‘incredible scenery and landscapes’ (47%) and showing ‘lots of activities and things to do’ (45%).

Descriptive statements that come out from advertisements



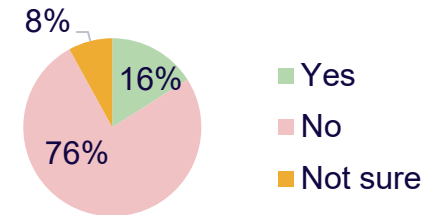
Almost a third of the Irish holiday market reported engaging with one of the Visit Wales digital marketing channels in the last 12 months, with the website, Facebook and Instagram being the leading points of contact.



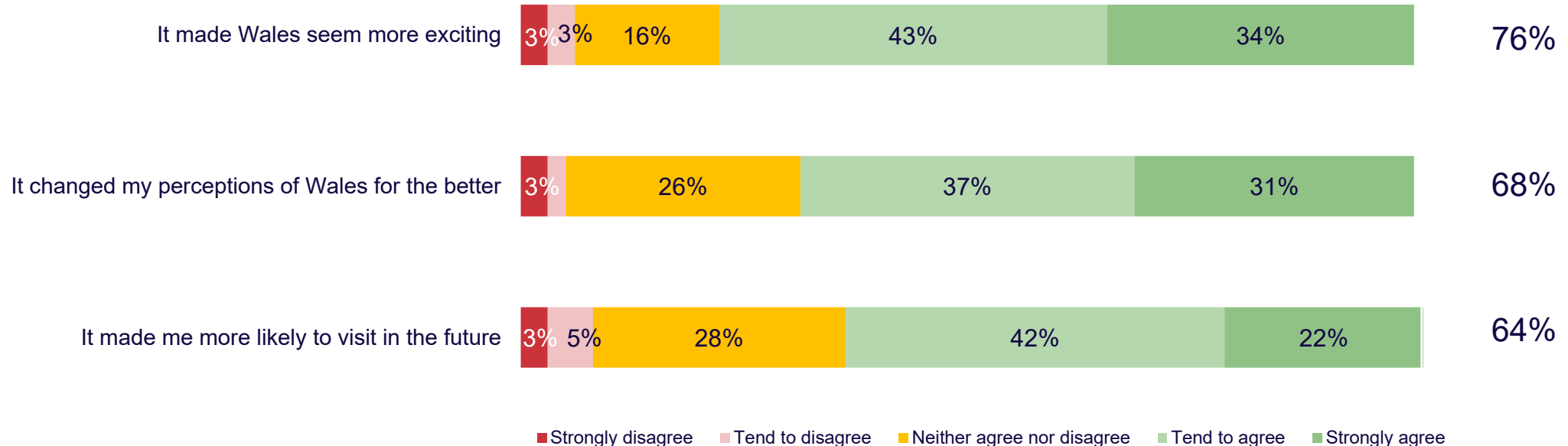
H8. More generally, which of the following apply to you and Visit Wales in the last 12 months?
Total base size, n=1000.

Among those who are unlikely or undecided about visiting Wales in 2023, 16% reported having seen marketing or advertising for holidays to Wales. Among this group, three-quarters found that it enhanced the perception of Wales as an exciting destination. Additionally, around two-thirds stated that it positively altered their perception of Wales and that it had increased their likelihood of visiting in the future.

% of those unlikely or undecided about visiting Wales in 2023, have you seen any marketing or advertising in relation to Welsh tourism?



% Agree



Marketing drives positive perception of Wales

Advertising campaigns considerably enhances Welsh appeal.

Effective marketing driving interest in Welsh tourism

Television ads and social media are the main channels through which Irish holidaymakers are learning about Wales, leading to high recall and positive perceptions of the destination.

Digital engagement and marketing impact

A considerable portion of those exposed to Welsh tourism advertisement reported a heightened interest and likelihood to visit, particularly to new areas of Wales.

WELCOME TO WREXHAM IMPACT



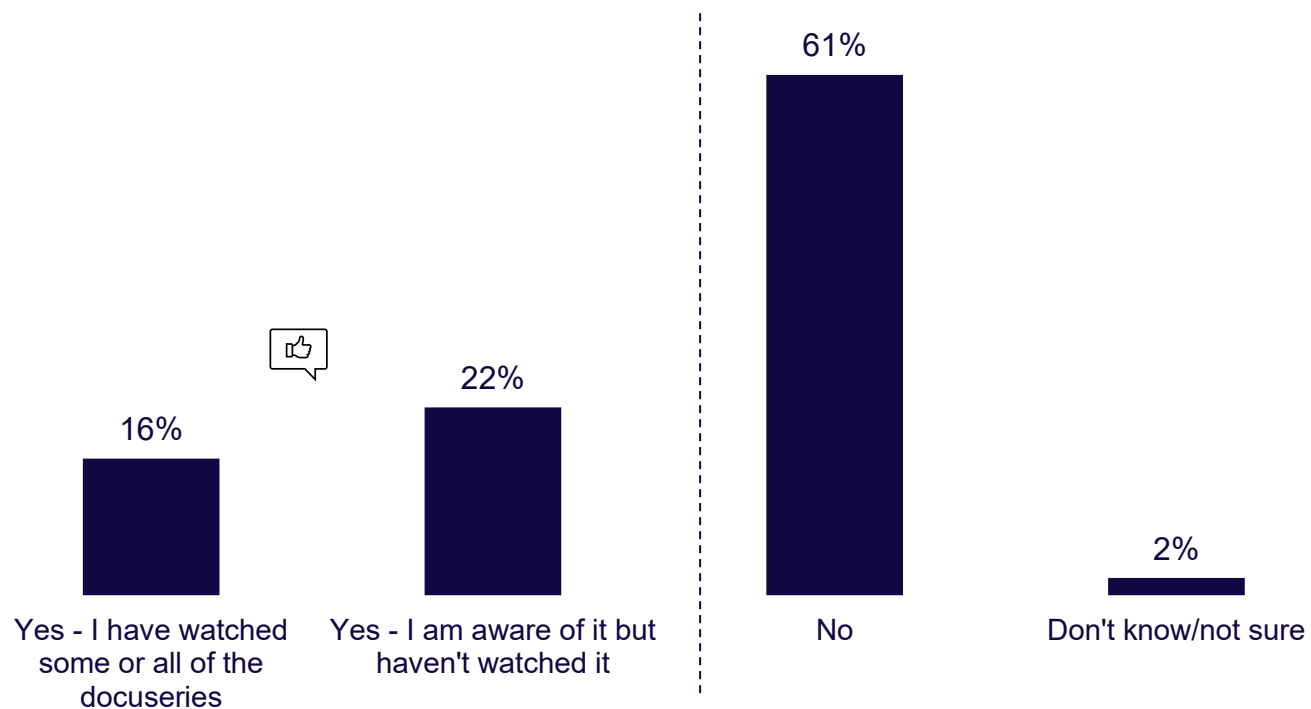
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More than a third stated they have heard or watched the TV docuseries “Welcome to Wrexham”.

Heard or watched the TV docuseries “Welcome to Wrexham”



G1. Before filling out this questionnaire, had you heard or watched the TV docuseries "Welcome to Wrexham"? Total base size, n=1000.

Of those who are aware of “Welcome to Wrexham”, just under a third stated they had talked about Wrexham or Wales with other people. A notable majority agreed that it made them more positive about Wales.

“Welcome to Wrexham” influence



“Welcome to Wrexham” impact perception of Wales

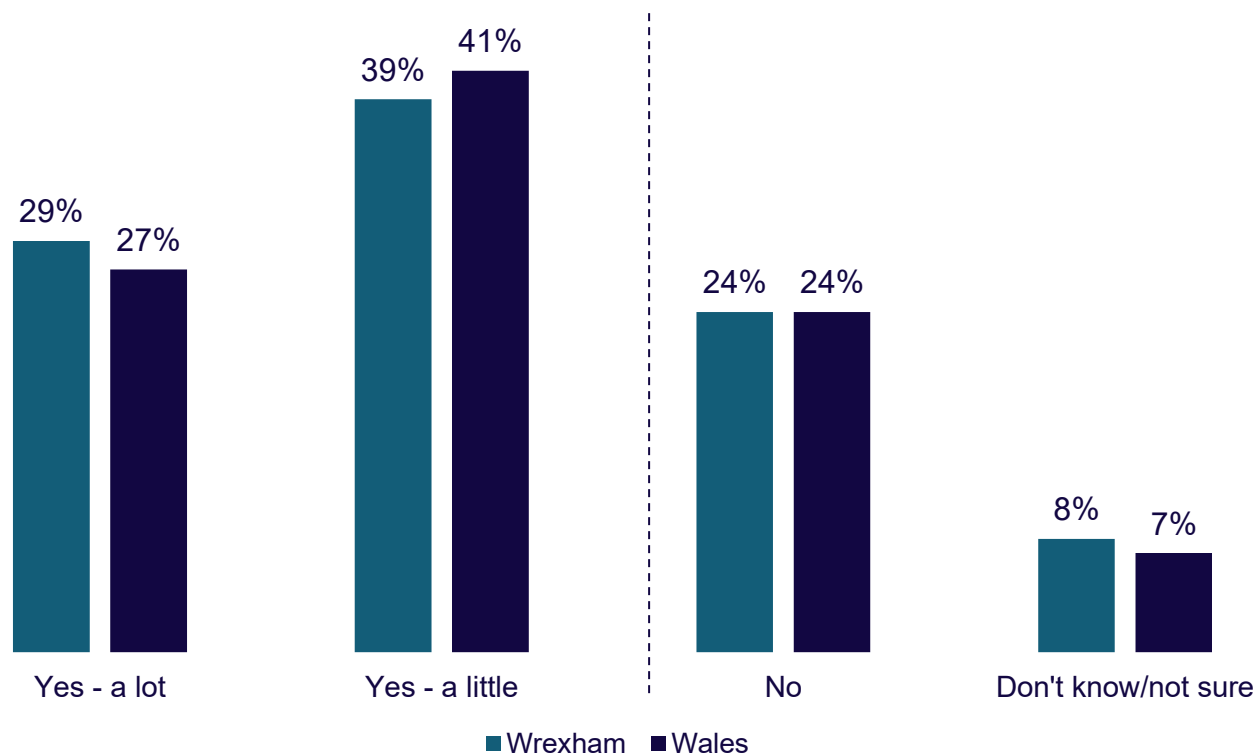


G2. Which, if any, of the following have you done as a result of hearing about or watching the TV docuseries "Welcome to Wrexham"?

G3. How if at all, has the docuseries “Welcome to Wrexham” impacted your perceptions of Wales? All who are aware of “Welcome to Wrexham”, n=372.

The majority of those who are aware of “Welcome to Wrexham” had increased interest in visiting both Wrexham and Wales.

“Welcome to Wrexham” increased interest in visiting Wrexham/Wales?

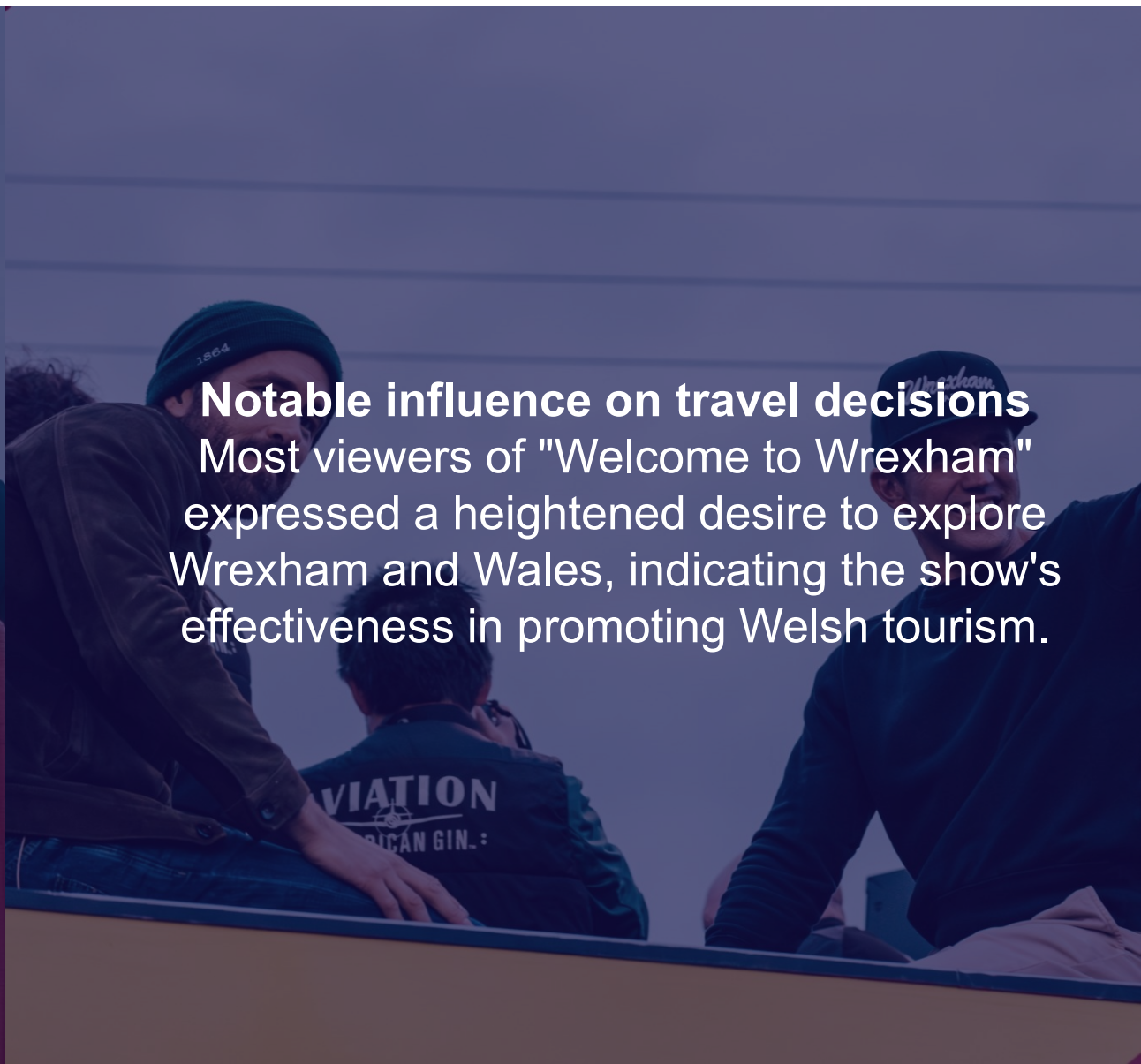
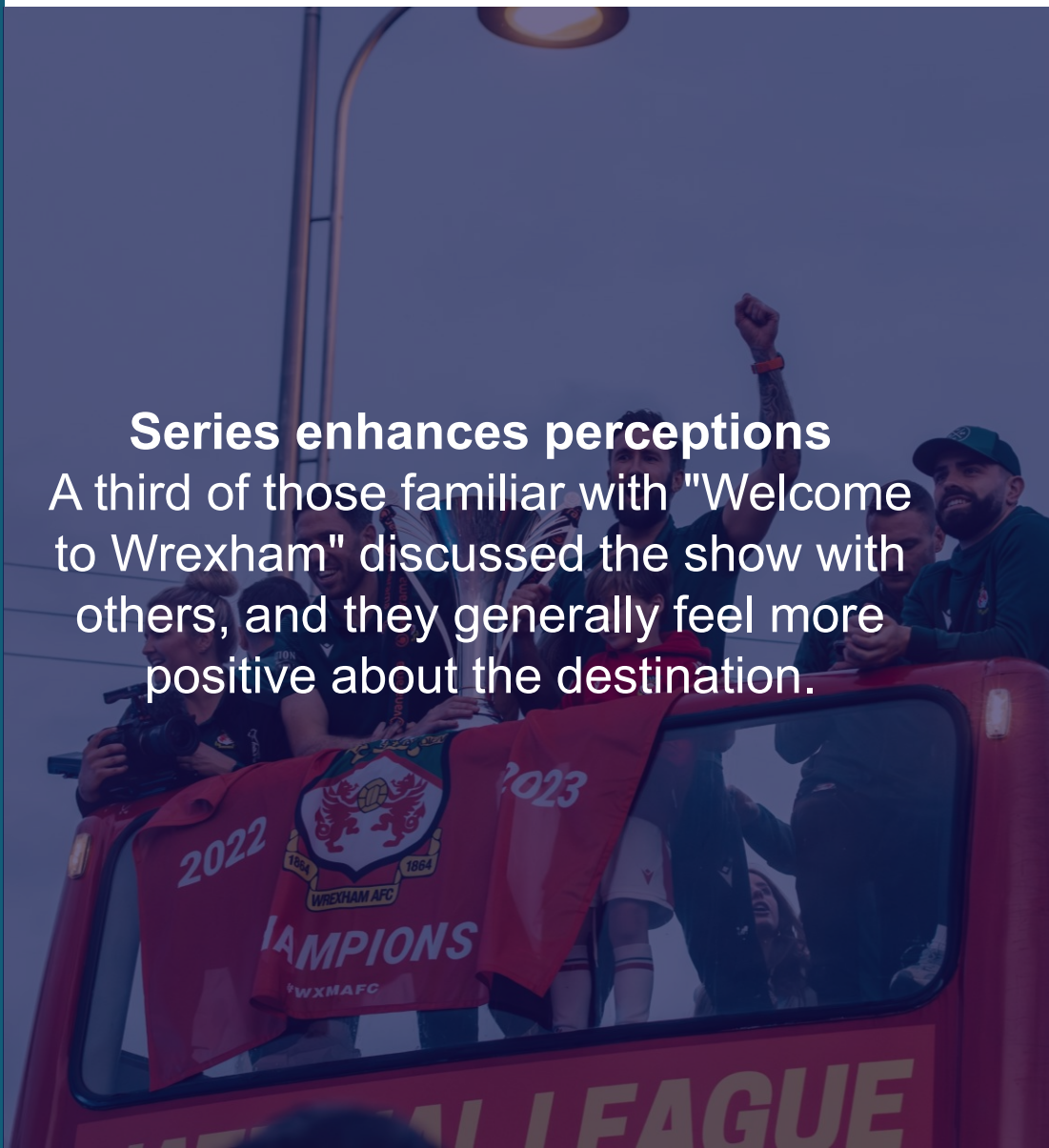


Series enhances perceptions

A third of those familiar with "Welcome to Wrexham" discussed the show with others, and they generally feel more positive about the destination.

Notable influence on travel decisions

Most viewers of "Welcome to Wrexham" expressed a heightened desire to explore Wrexham and Wales, indicating the show's effectiveness in promoting Welsh tourism.



REASONS FOR NOT VISITING WALES



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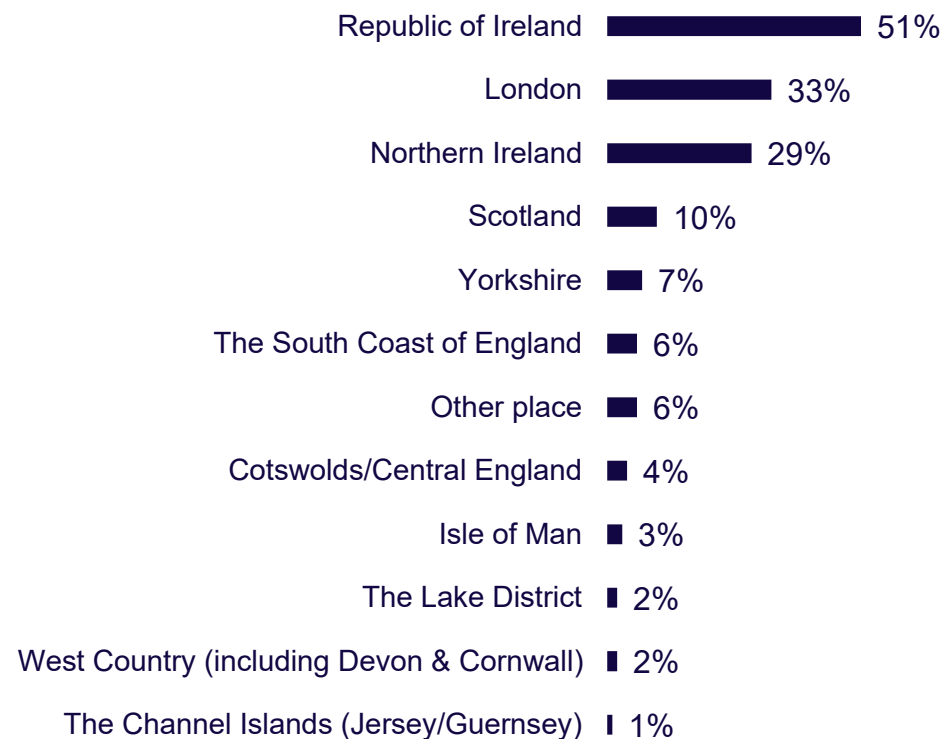


Of those who did not visit Wales in 2023, the majority did not consider taking an overnight trip in Wales in 2023. Close to half went somewhere else in the UK or Ireland, mostly to the Republic of Ireland or London.

18% of non-Wales trip takers were considering an overnight trip in Wales in 2023



Where in British Isles or Ireland?



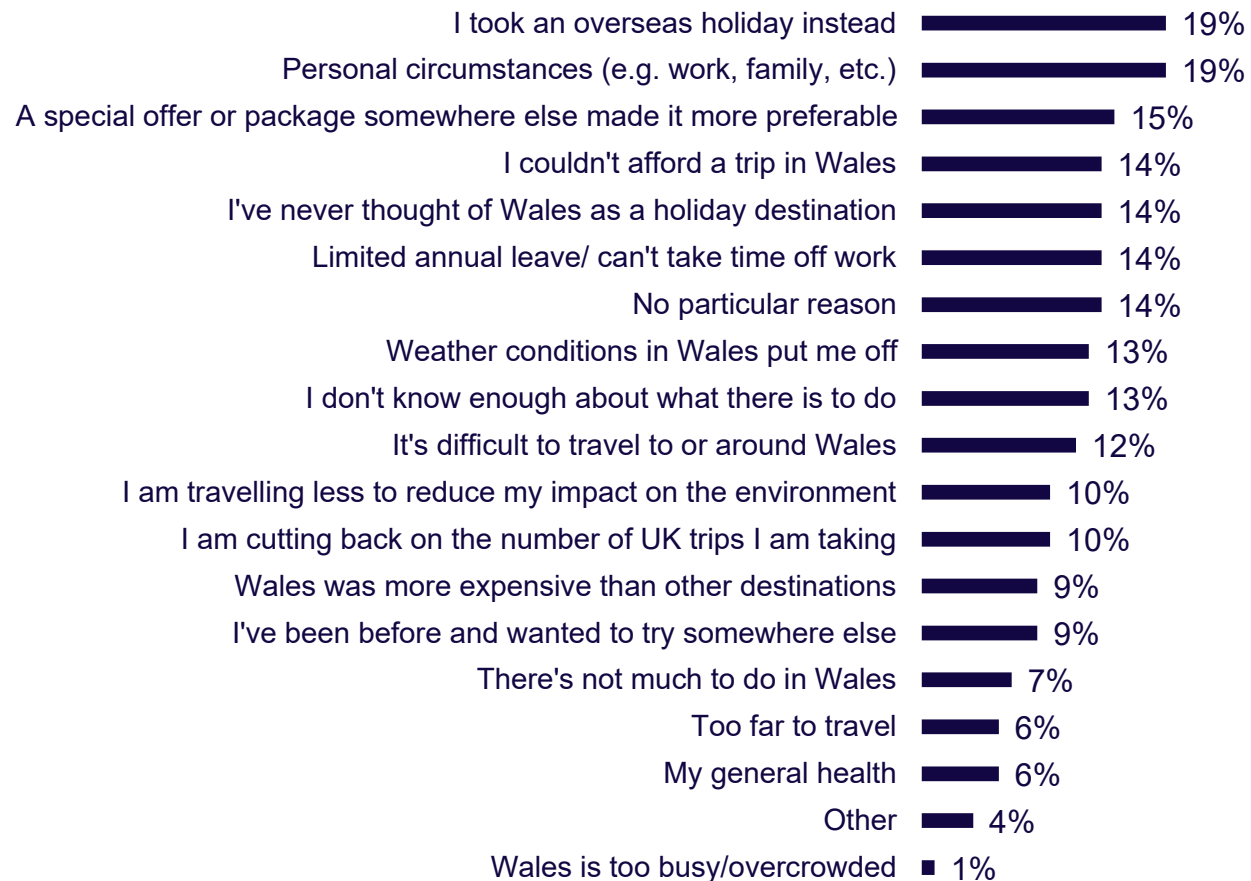
E1. You indicated that you did not take a short break or holiday in Wales in 2023. Were you considering a trip in Wales in 2023 at any stage?

E2. Did you go somewhere else for a short break or holiday in 2023 or did you not take one at all? Non-Wales trip takers 2023, n=838.

E3. To which of the following areas of the British Isles and Ireland did you go on your short break or holiday in 2023? Went to British Isles or Ireland, n=388.

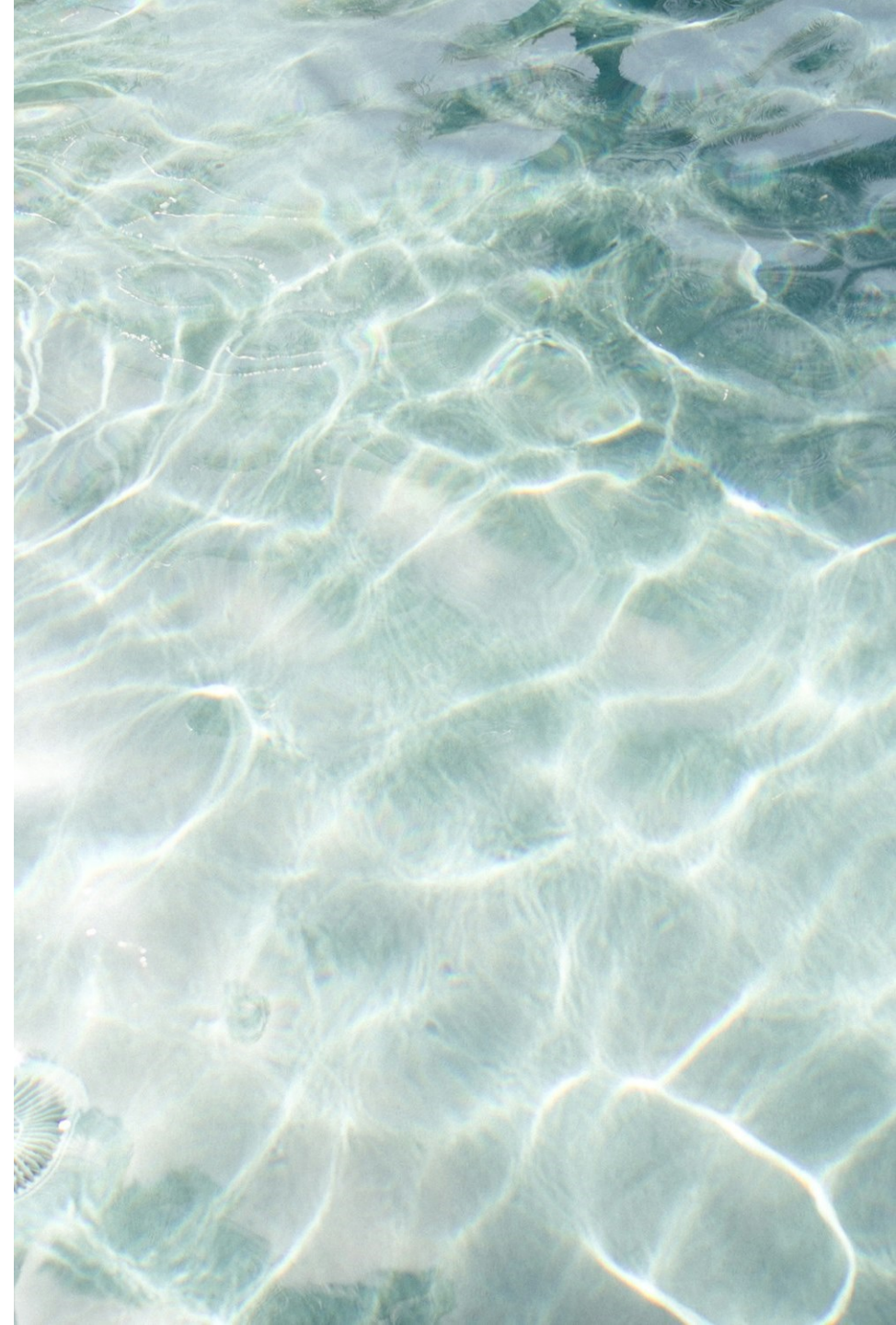
Taking an overseas holiday and personal circumstances were the top two reasons for not visiting Wales in 2023.

Reasons for not visiting Wales in 2023



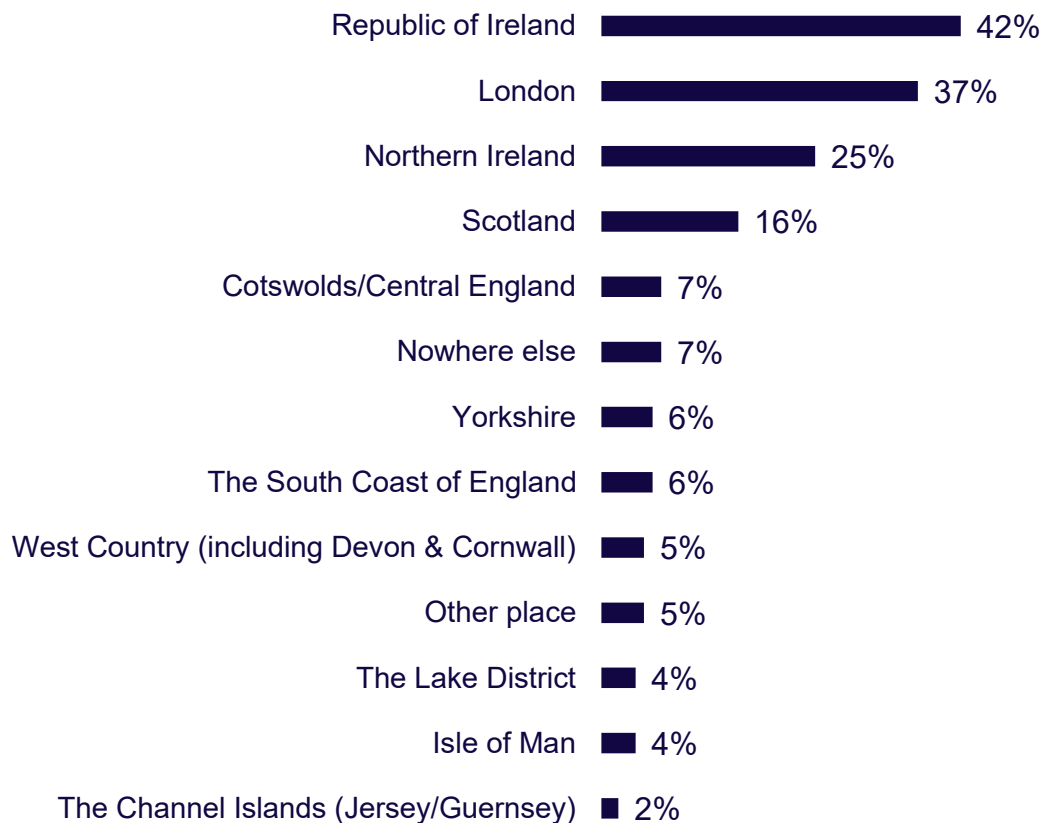
In 2024, the primary reason for not planning to visit Wales was opting for an overseas holiday instead, mirroring the top rationale from 2023. This was closely followed by the perception that Wales wasn't considered a typical holiday destination.

Reasons for not planning to visit Wales in 2024



Of those who are not planning to visit Wales in 2024, most are considering the Republic of Ireland or London, followed by Northern Ireland or Scotland.

UK and Ireland locations considered for visiting in 2024





Overseas holiday appeal

The primary reason Irish holidaymakers skipped Wales in 2023 and plan to do so again in 2024 is the preference for overseas holidays, underscoring the challenge for Welsh tourism to compete with international destinations.

Domestic alternatives

For those not visiting Wales, many also opted for other domestic locations, with the Republic of Ireland and London being the most popular alternatives, followed by Northern Ireland and Scotland.

Perception issues impact Wales's appeal

Wales faces some challenge in attracting visitors due to its perception as an unconventional holiday destination. Among those not intending to visit in 2024, nearly one in five does not view Wales as a typical holiday spot.

MOTIVATION & PERCEPTIONS



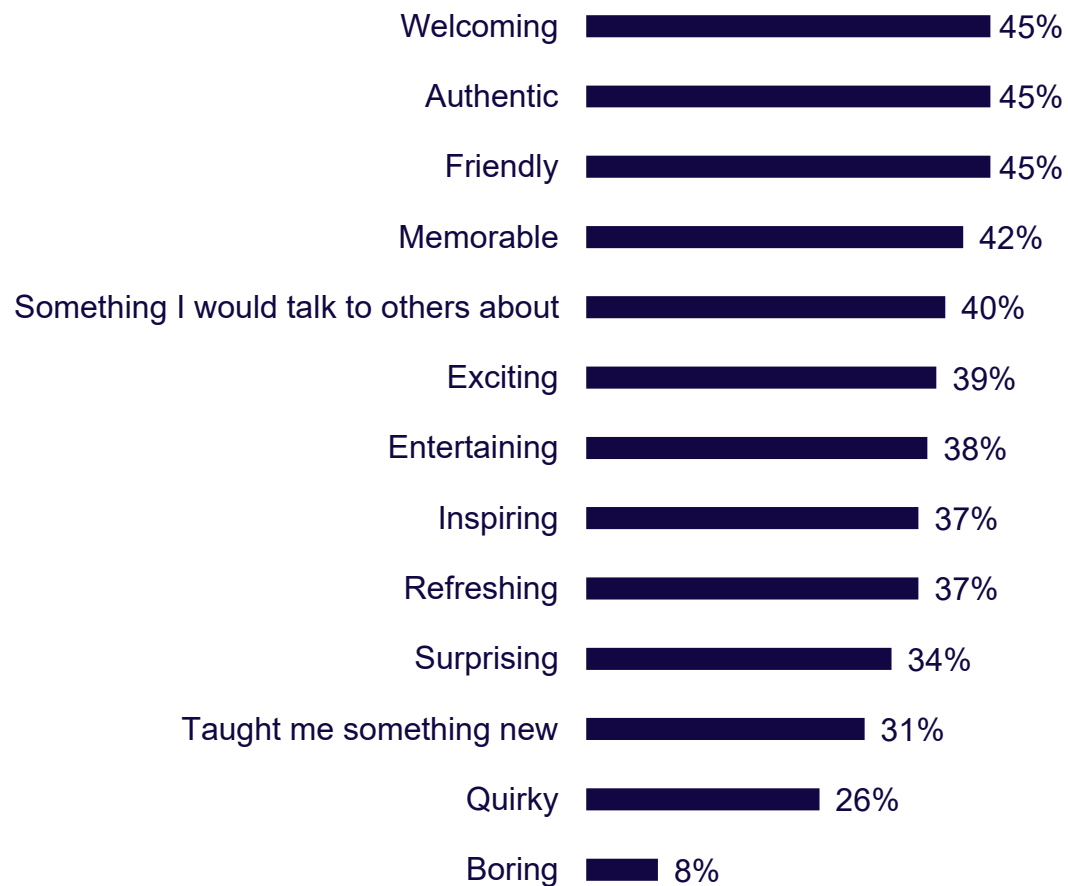
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Almost half associate Wales with being welcoming, authentic and friendly.

Association with Wales



I2. Please select all the holiday destinations you associate with the following words.
Total base size, n=1000.





Wales is seen as a place where you can explore history and heritage, roam around and explore iconic sites.


Statements association with Wales





A welcoming destination

A considerable proportion of Irish holidaymakers hold a favourable view of Wales, associating it with several positive and appealing characteristics. They see Wales as a hospitable and genuine destination.



Cultural heritage

Wales is highly regarded among many Irish holidaymakers for its rich history and opportunities for exploration. These top attributes highlight Wales as a destination where visitors can immerse themselves in historical and cultural experiences.