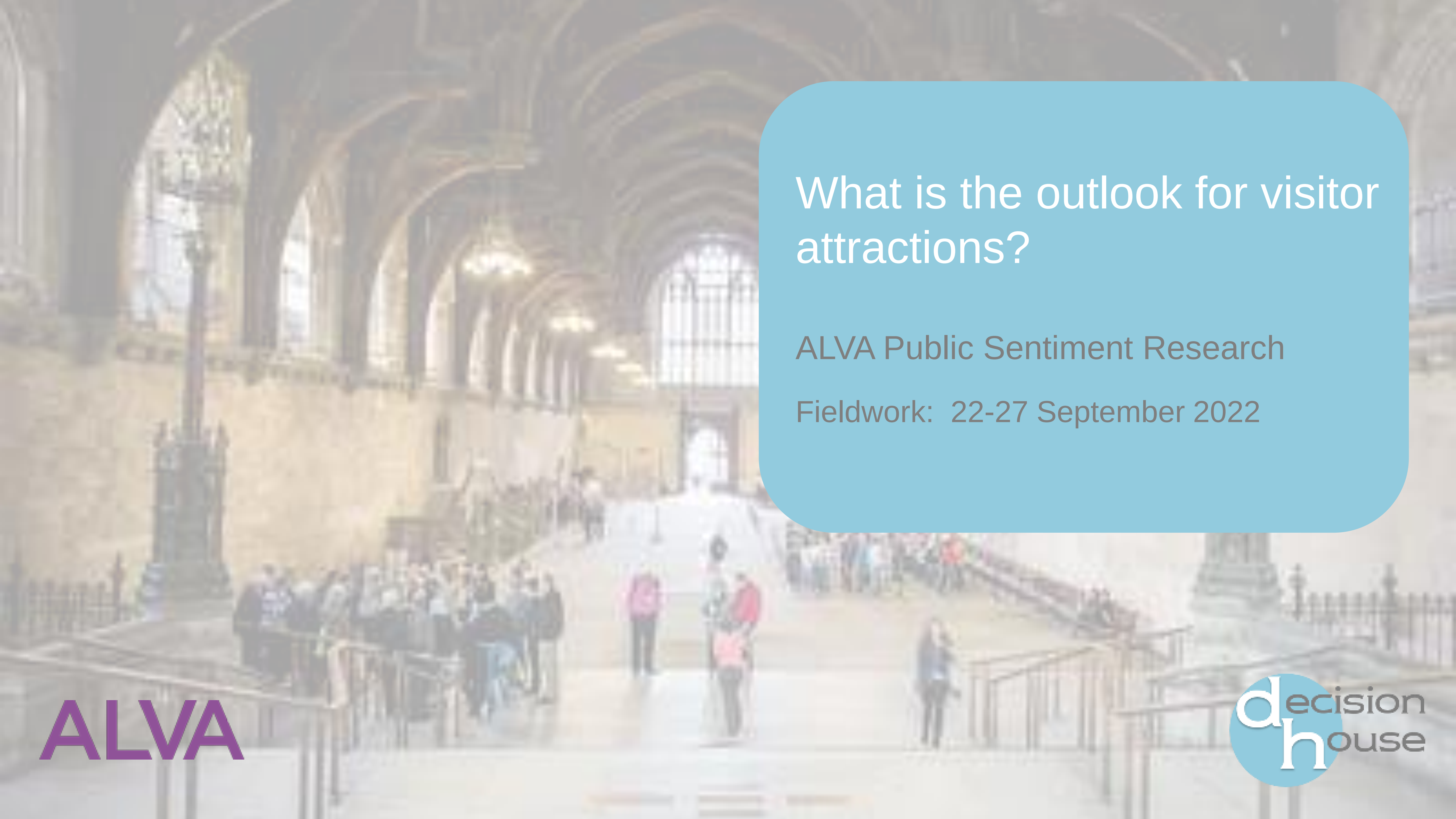


What is the outlook for visitor attractions?

ALVA Public Sentiment Research

Fieldwork: 22-27 September 2022

ALVA

decision house

The current challenge

The attractions sector as a whole is experiencing a period of uncertainty

- What are the current barriers preventing the public from visiting attractions?
- What are the prospects for visitor admissions during the autumn / winter period?
- Where are the opportunities for visitor growth?

How did we generate the insights?

Online research among representative sample of the UK adult public:

6-10 June 2022

1,020 survey responses

22-27 September 2022

1,017 survey responses

Government energy bill support announcement on 8 September

Mini-budget on 23 September

Source: Aurora MR Omnibus Surveys (6-10 June, 22-27 September 2022)

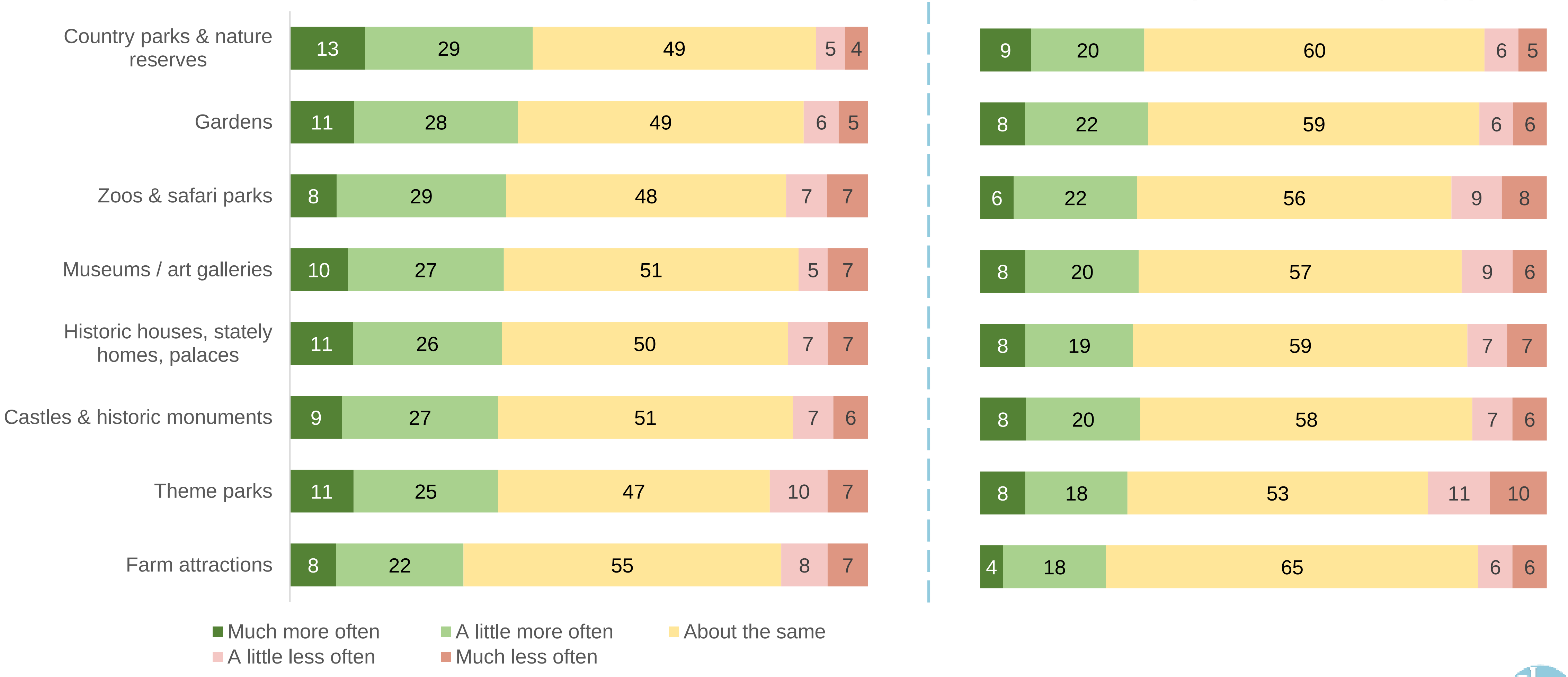
The recovery from the Covid period is likely to continue in the coming months, with audiences more likely to say they will visit more often compared with last year. However, this recovery has slowed, with an increasing minority of audiences saying they will visit less often than last year

JUNE 2022

How often will visit attraction type this SUMMER / AUTUMN compared with last year (%)

SEPTEMBER 2022

How often will visit attraction type this AUTUMN / WINTER compared with last year (%)

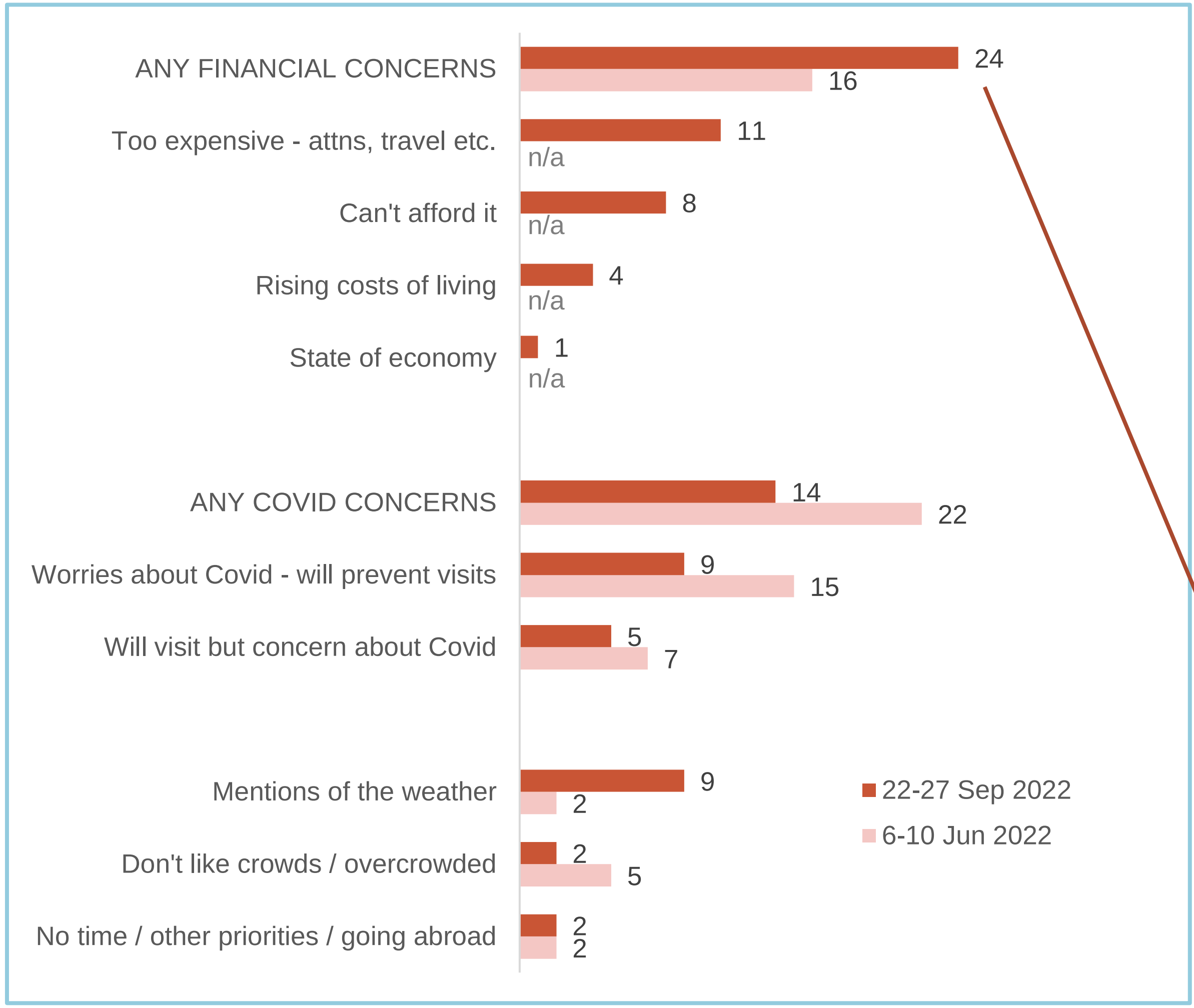


Q: How often do you think that you will visit each of these types of attraction in the UK in the next few months compared with the same period last year?

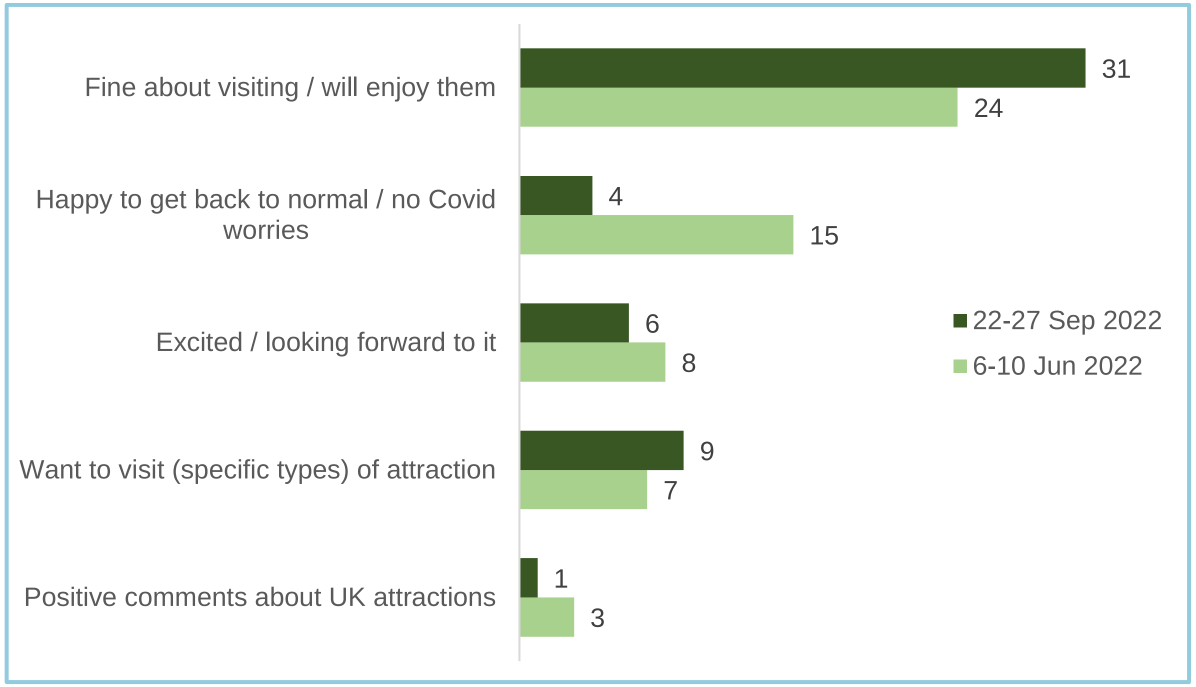
Bases: All who tend to visit this type of attraction

This slowing of the recovery is being driven by the increasing financial concerns of audiences, especially families

44% spontaneously expressed concerns about visiting in Jun 2022
52% spontaneously expressed concerns about visiting in Sep 2022



58% spontaneously expressed positives about visiting in Jun 2022
52% spontaneously expressed positives about visiting in Sep 2022



	Aged 16-34	Aged 35-54	Aged 55+
Any financial concerns	20%	26%	18%

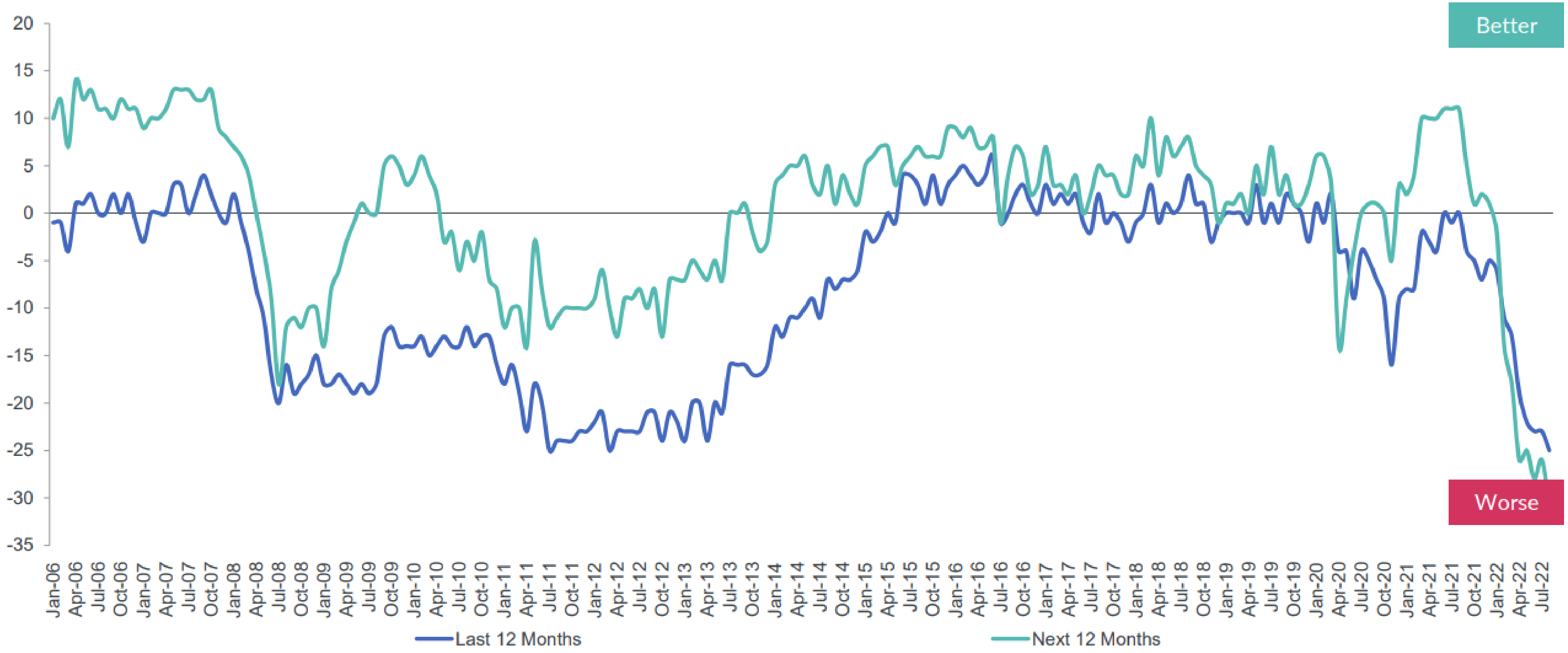
	Children	No children
Any financial concerns	29%	21%

Q: Please tell us in your own words how you feel about visiting attractions in the UK at the moment and over the next three months or so.

Bases: All respondents expressing an opinion (Jun=796, Sep=810)

This is perhaps not surprising given that the *UK Consumer Confidence Barometer* shows the public's outlook for their own financial situation over the next twelve months is at the lowest point for the past 15 years

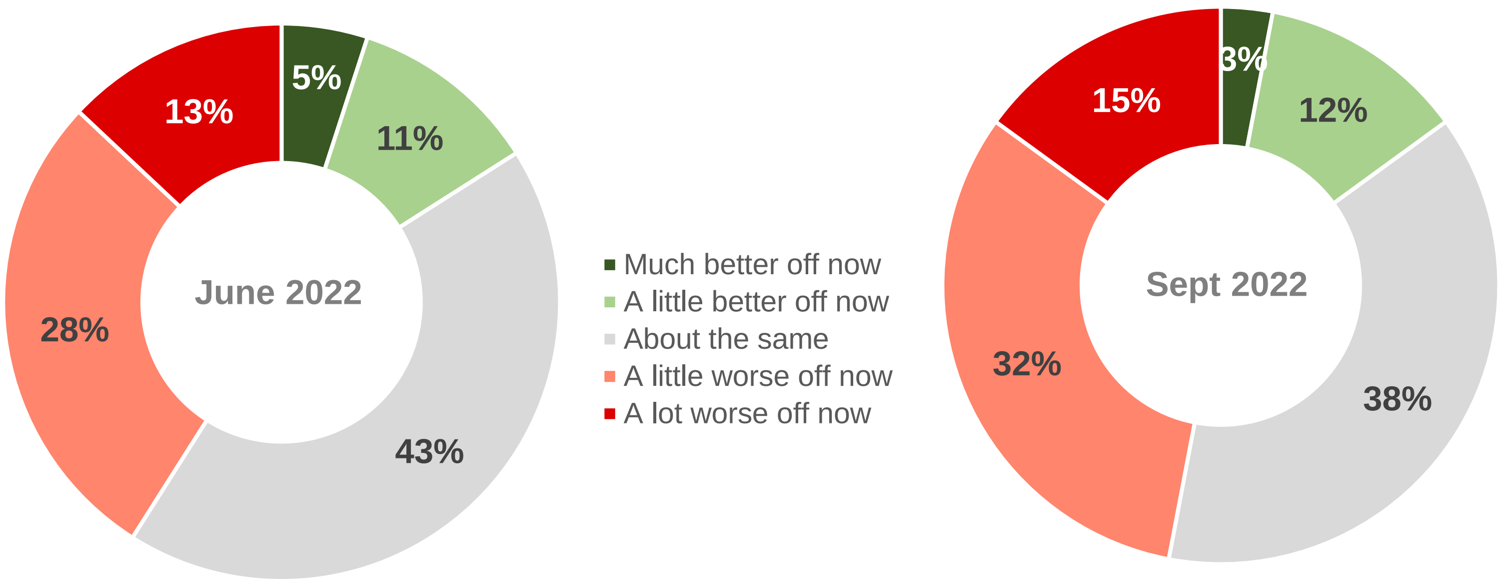
Personal financial situation of household



Q1 How has the financial situation of your household changed over the last 12 months? Got a lot better = 1 / Got a little better = 0.5 / Stayed the same = 0 / Got a little worse -0.5 / Got a lot worse = -1;
Q2 How do you expect the financial position of your household to change over the next 12 months? Get a lot better = 1 / Get a little better = 0.5 / Stay the same = 0 / Get a little worse -0.5 / Get a lot worse = -1

Within our survey, almost half now feel worse off financially than they did a year ago, an increase on the 40% observed in June. Again, we see that this is impacting most keenly on the day trip taking behaviour of families and those on lower incomes

How personal financial situation compares with about a year ago (%)



YouGov survey of 2,162 UK adults (September 2022)

Gross household income	<£20k	£20-40k	£40k-60k	>£60k
% forced to make cutbacks to DAY TRIPS?	49%	41%	35%	24%

Children in h/h	No children	Children
% forced to make cutbacks to DAY TRIPS?	34%	49%

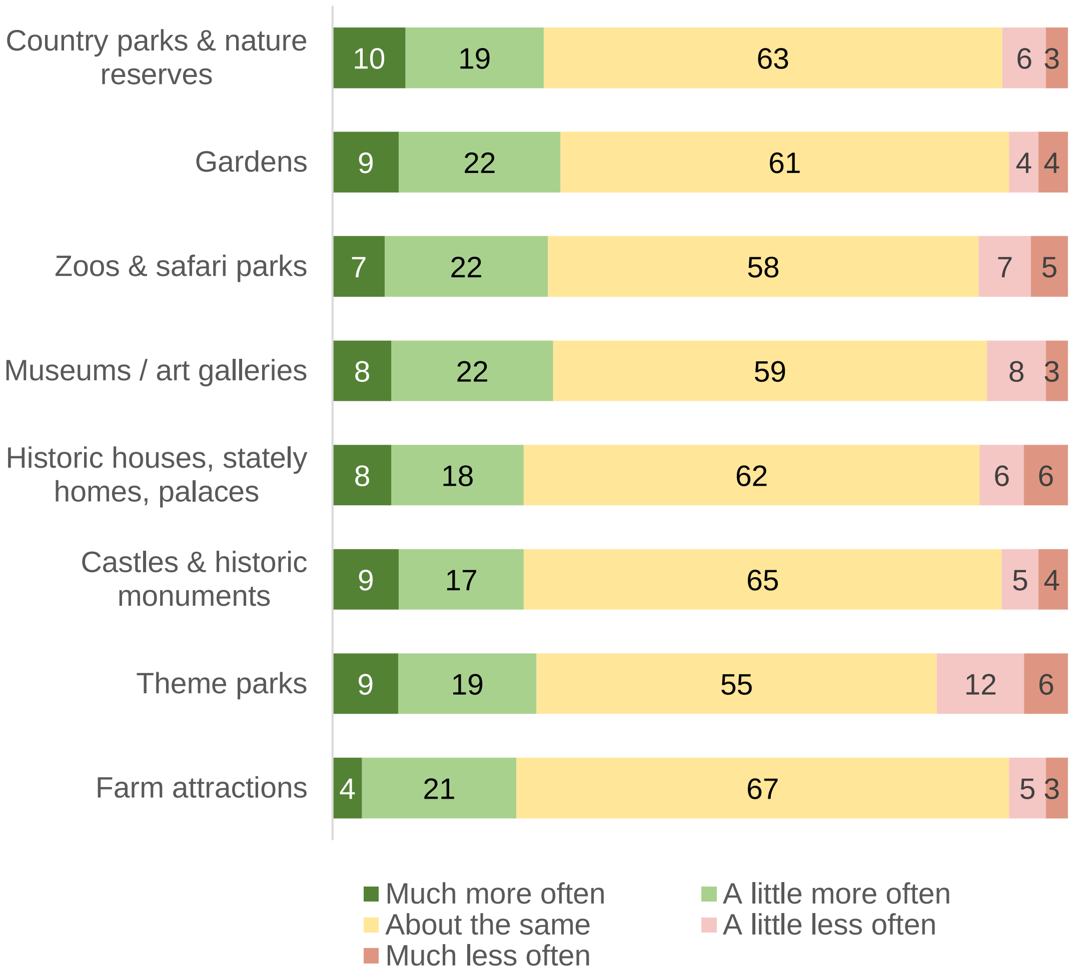
Age	<25 yrs	25-34s	35-44s	45-54s	>55 yrs
% forced to make cutbacks to DAY TRIPS?	42%	45%	47%	43%	26%

Q: Thinking about your financial situation now, how does this compare with about a year ago?
Base: All respondents (Jun=1,016, Sep=1,008)

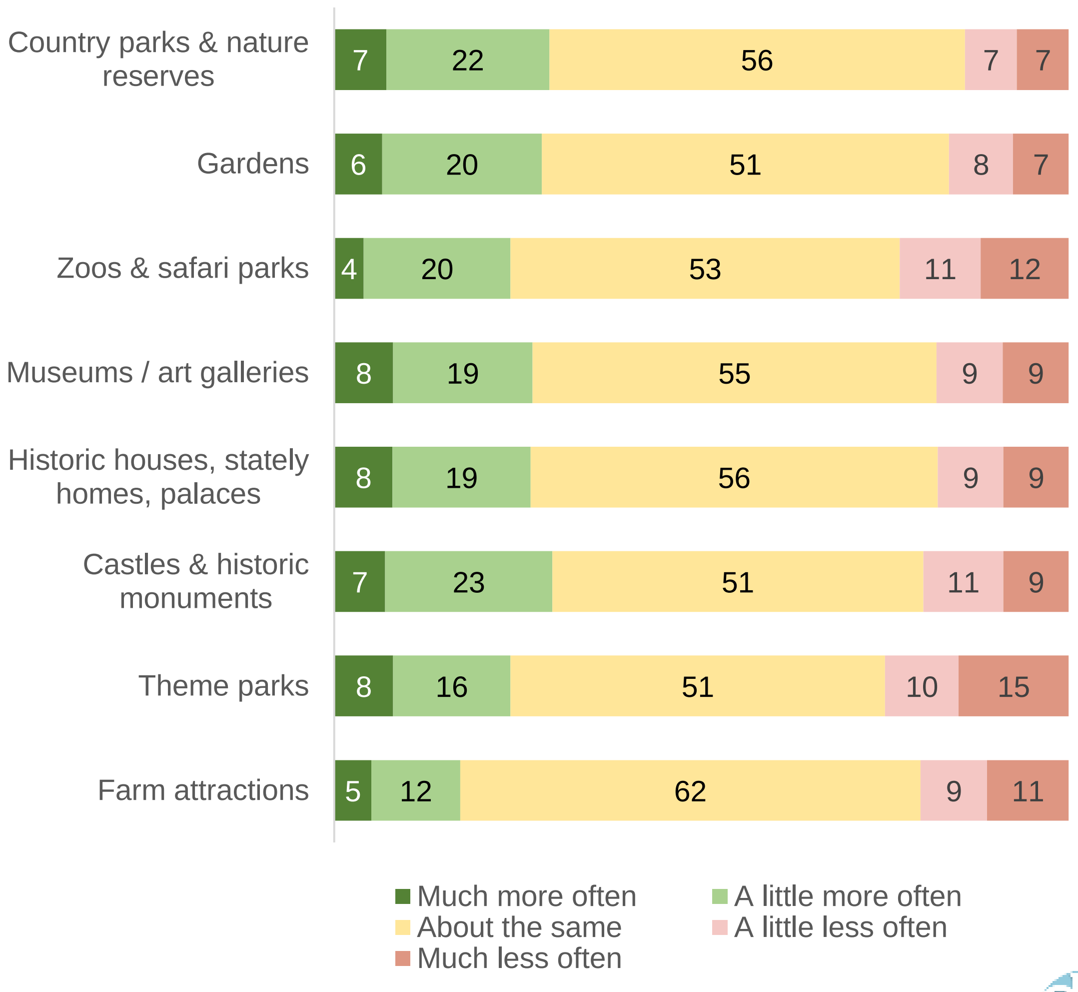
We can see how this is impacting visitor attractions, with those feeling financially worse off more likely than others to say that they will visit attractions less often this autumn / winter – particularly the sectors with typically higher priced admissions

How often will visit attraction type this autumn / winter compared with last year (%)

Feel better off / same financially (%)



Feel worse off financially (%)

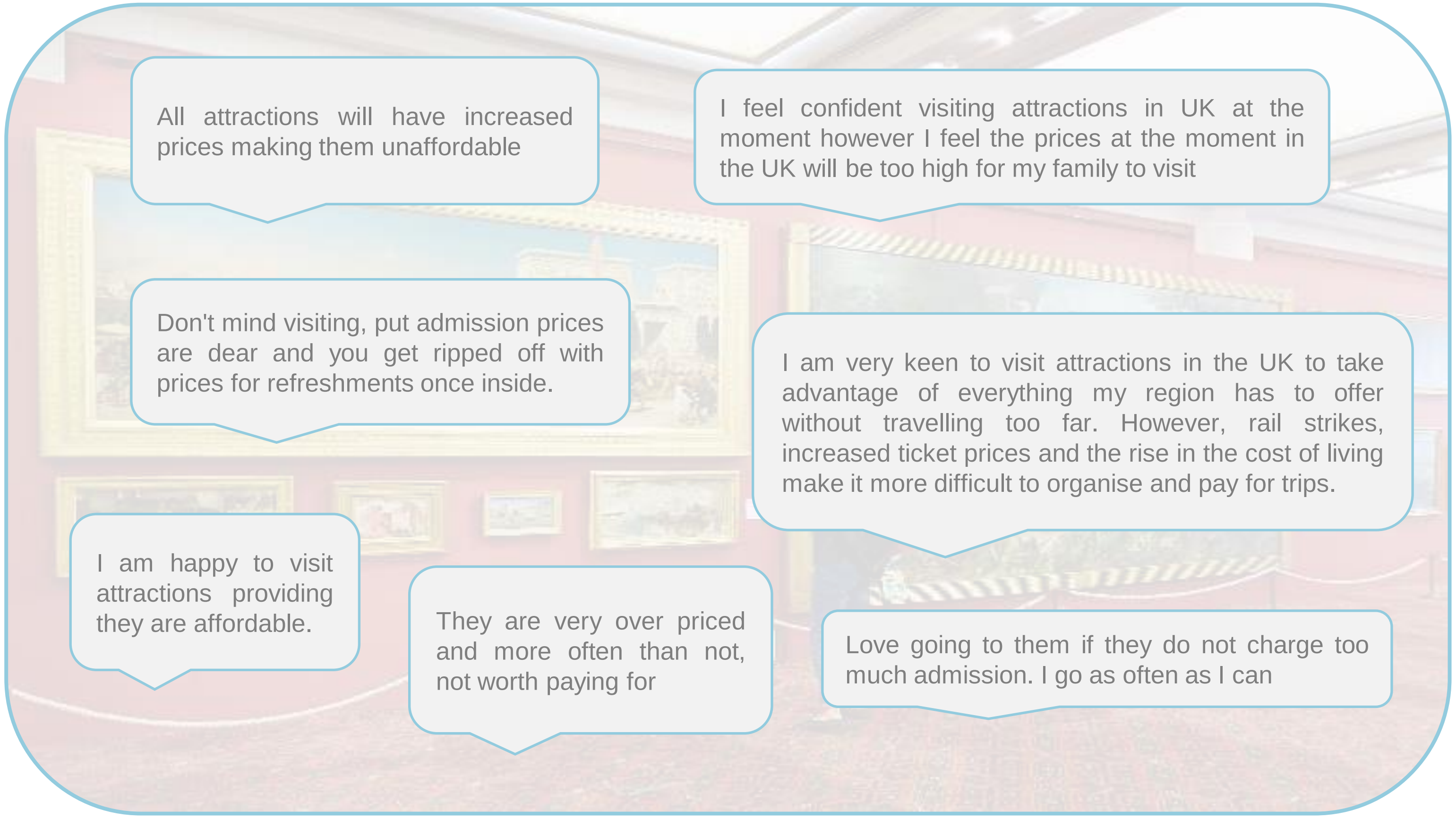


Q: How often do you think that you will visit each of these types of attraction in the UK in the next few months (up to the end of February 2023) compared with the same period last year?

Bases: All who tend to visit this type of attraction

There appears to be an underlying assumption for many that the cost of visiting attractions could be increasing in line with other areas of the economy. Perhaps some reassuring communications needed around ‘value’?

Too expensive – attractions, travel, accommodation etc. (11%)



All attractions will have increased prices making them unaffordable

I feel confident visiting attractions in UK at the moment however I feel the prices at the moment in the UK will be too high for my family to visit

Don't mind visiting, put admission prices are dear and you get ripped off with prices for refreshments once inside.

I am very keen to visit attractions in the UK to take advantage of everything my region has to offer without travelling too far. However, rail strikes, increased ticket prices and the rise in the cost of living make it more difficult to organise and pay for trips.

I am happy to visit attractions providing they are affordable.

They are very over priced and more often than not, not worth paying for

Love going to them if they do not charge too much admission. I go as often as I can

Q: Please tell us in your own words how you feel about visiting attractions in the UK at the moment and over the next three months or so.

Bases: All respondents expressing an opinion (810)

Others are simply prioritising cutting down or removing the relative ‘luxury’ of visiting (paid) attractions from their leisure time. Initial evidence that free attractions will fare better

Can’t afford it (8%)

We are trying to save money at the moment so only going out if it is free or we have vouchers, maybe National Trust places.

I may visit attractions that are free as I am trying to save money but will still go from now up until February

Money is tight so cut backs start with entertainment. Paid attractions will be cut back on by 90%

I really don't want to spend money on luxuries with how things are right now

I have no interest in visiting any UK attractions in the near future, I cannot afford anything but essentials.

Won't be visiting attractions, unable to afford them.

Rising cost of living (4%)

Feel like I would like to, and will be more inclined to go to free museums to help with the cost of living

Would love to visit places of interest in the UK, but due to cost of living crisis, cannot afford to do it. More important that my family is fed than having days out.

I enjoy visiting attractions in the UK but due to the rising cost of living, I have had to limit the amount of my visits. There are not many that are free and I find the admittance fees quite expensive

I feel back to normal in terms of visiting sites after covid, but the rising cost of living makes it harder to visit as many places

I think that with rising costs in electric bills and petrol that making visits to anywhere will not be possible

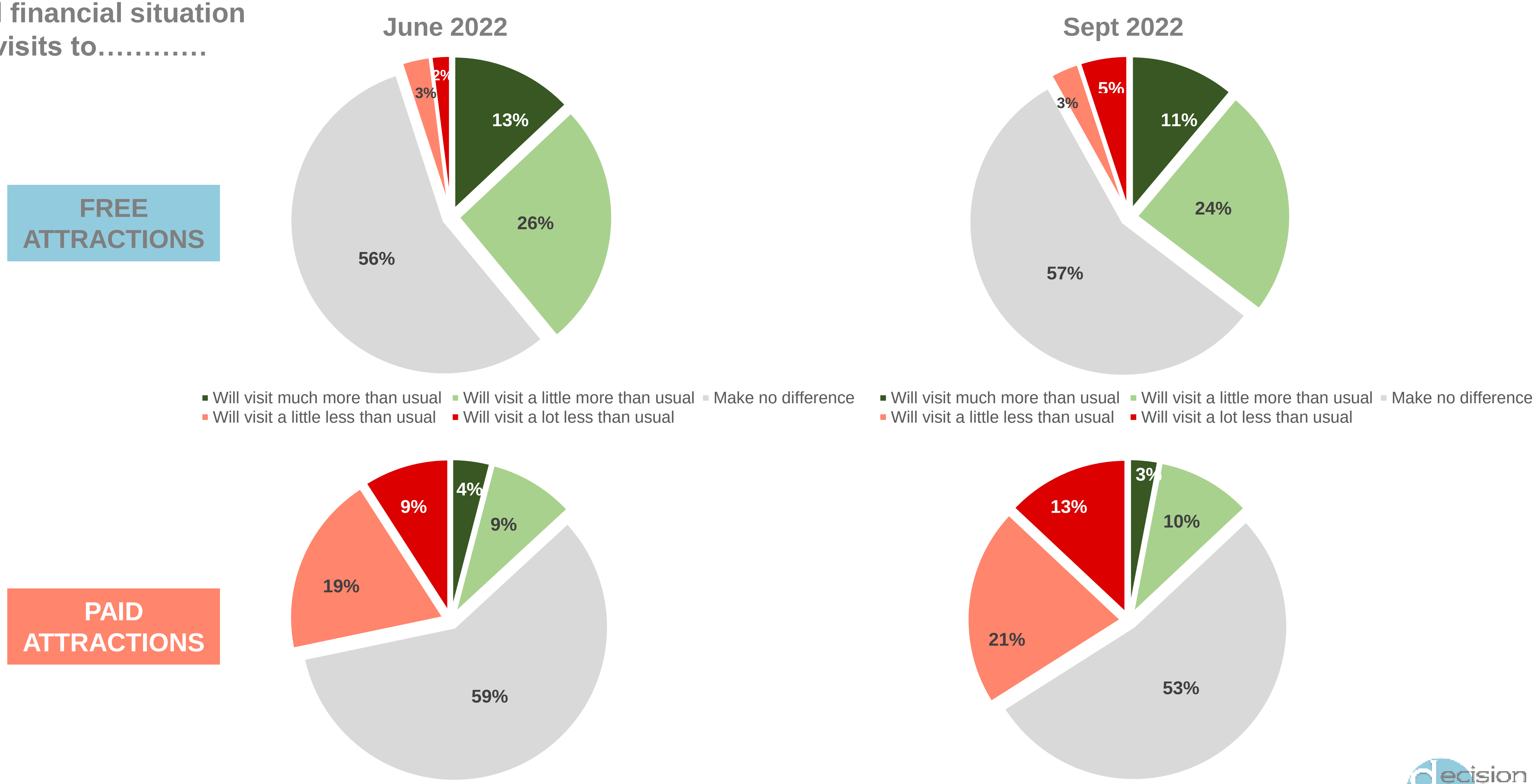
I love visiting attractions, and given funds I'd love to see some over the next six months. Given that utilities are about to go up by 30-40% (even with this inadequate ceiling), and the prices of groceries and fuel - it's unlikely. Happy bloody Christmas Ms Truss.

Q: Please tell us in your own words how you feel about visiting attractions in the UK at the moment and over the next three months or so.

Bases: All respondents expressing an opinion (810)

Indeed, it is clear that free attractions are set to benefit over the next few months at the expense of paid attractions – a third will be visiting paid attractions less than usual as a result of their financial situation

How personal financial situation will affect visits to…………

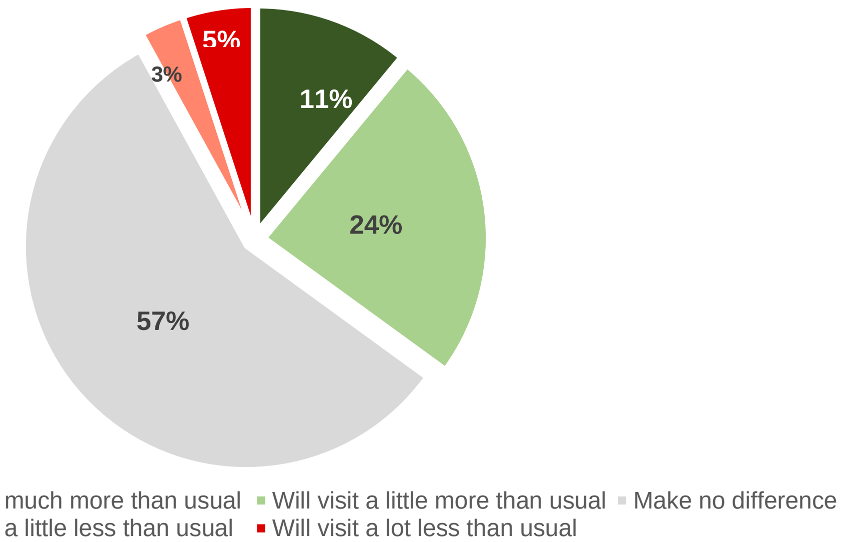


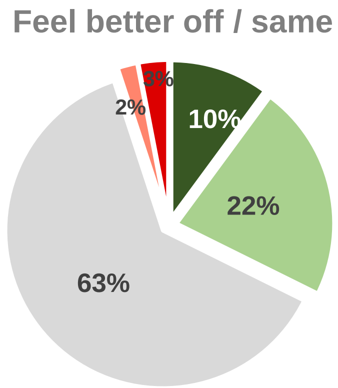
Q: And how do you think that your financial situation will affect each of the following in the next few months?
Base: All respondents who visit each type of attraction

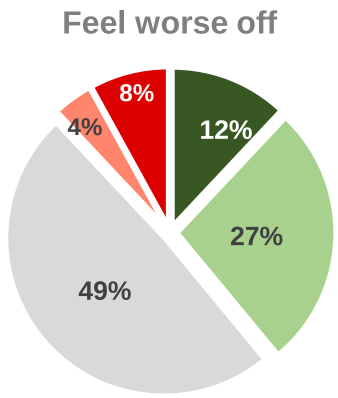
This switch to free attractions is being driven primarily by that 50% of the public who feel worse off financially than they did last year – over half of this group will visit paid attractions less in the next few months

How personal financial situation will affect visits to………… (September 2022)

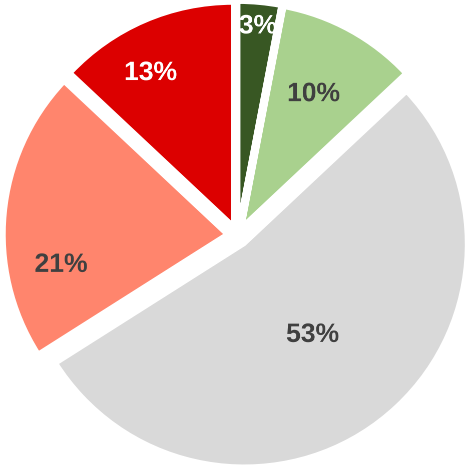
FREE ATTRACTIONS

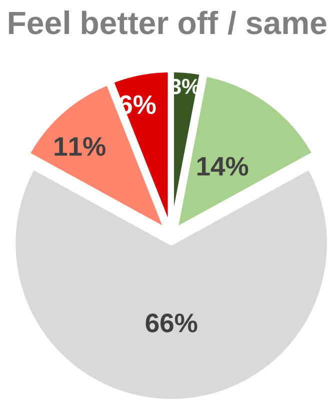


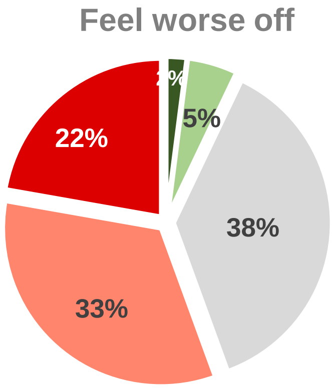




PAID ATTRACTIONS





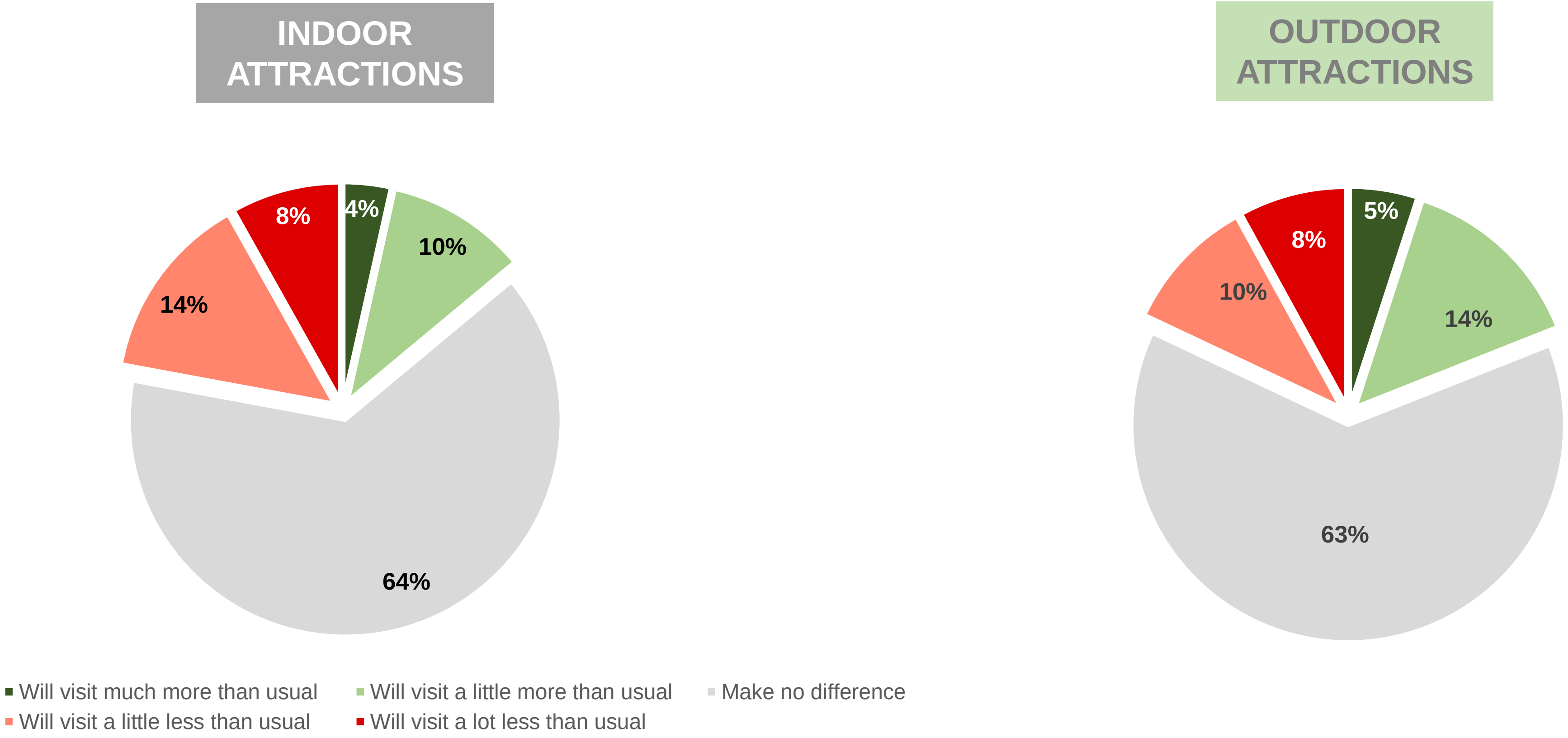


Q: And how do you think that your financial situation will affect each of the following in the next few months (up to February 2023)?

Base: All respondents who visit each type of attraction

Outdoor attractions are set to fare slightly better than indoor attractions, although this may be linked to perceptions around needing to pay admission to indoor / outdoor attractions

How personal financial situation will affect visits to…………(September 2022)

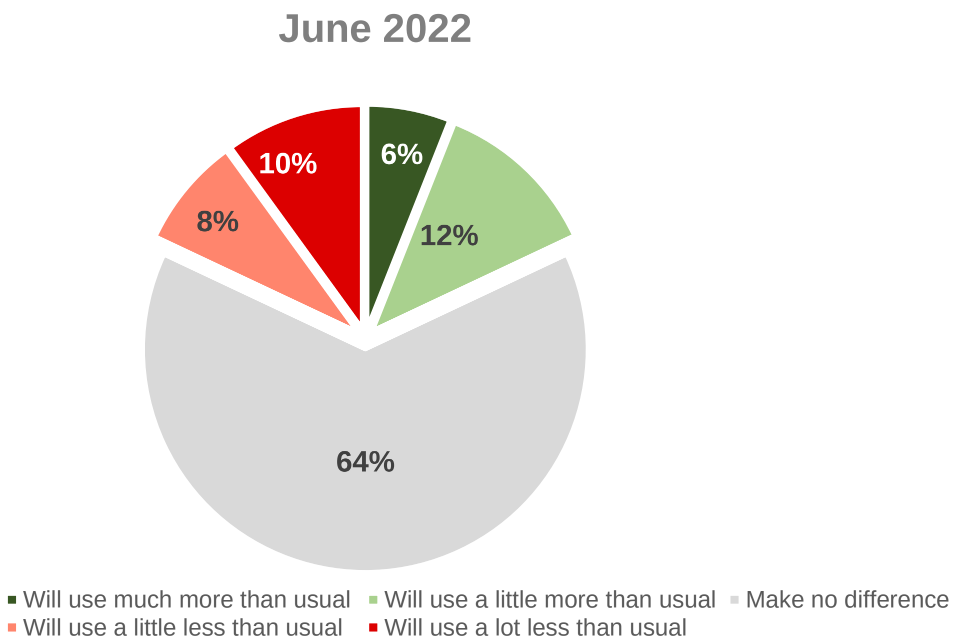


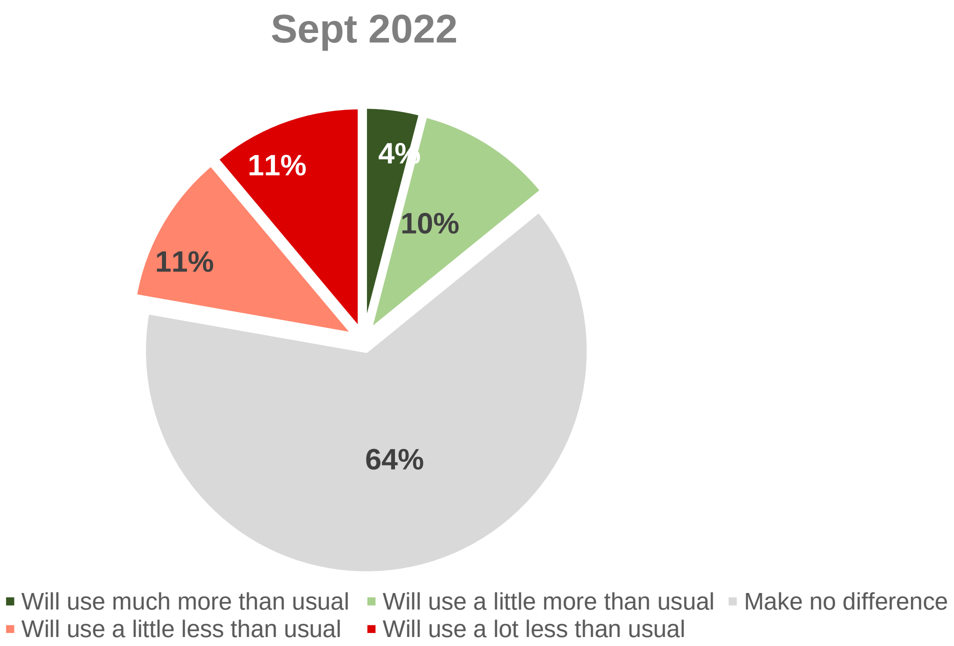
Q: And how do you think that your financial situation will affect each of the following in the next few months (up to February 2023)?
Base: All respondents who visit each type of attraction

The situation for memberships / season passes has become tougher since June, with existing members now much less likely to renew as a result of their financial situation. There is now less evidence that members will squeeze as many visits as possible from their memberships – perhaps wanting to limit secondary spend?

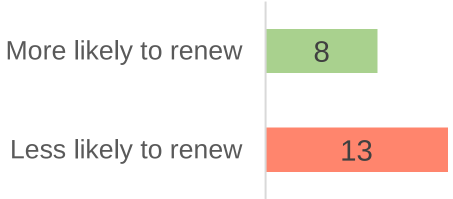
How personal financial situation will affect HOLDERS OF MEMBERSHIPS / SEASON PASSES

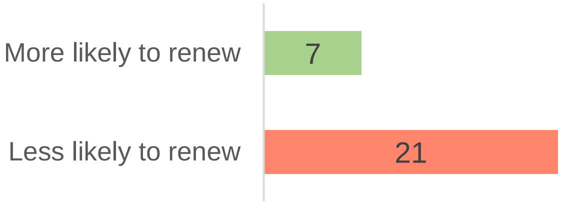
USAGE





RENEWAL





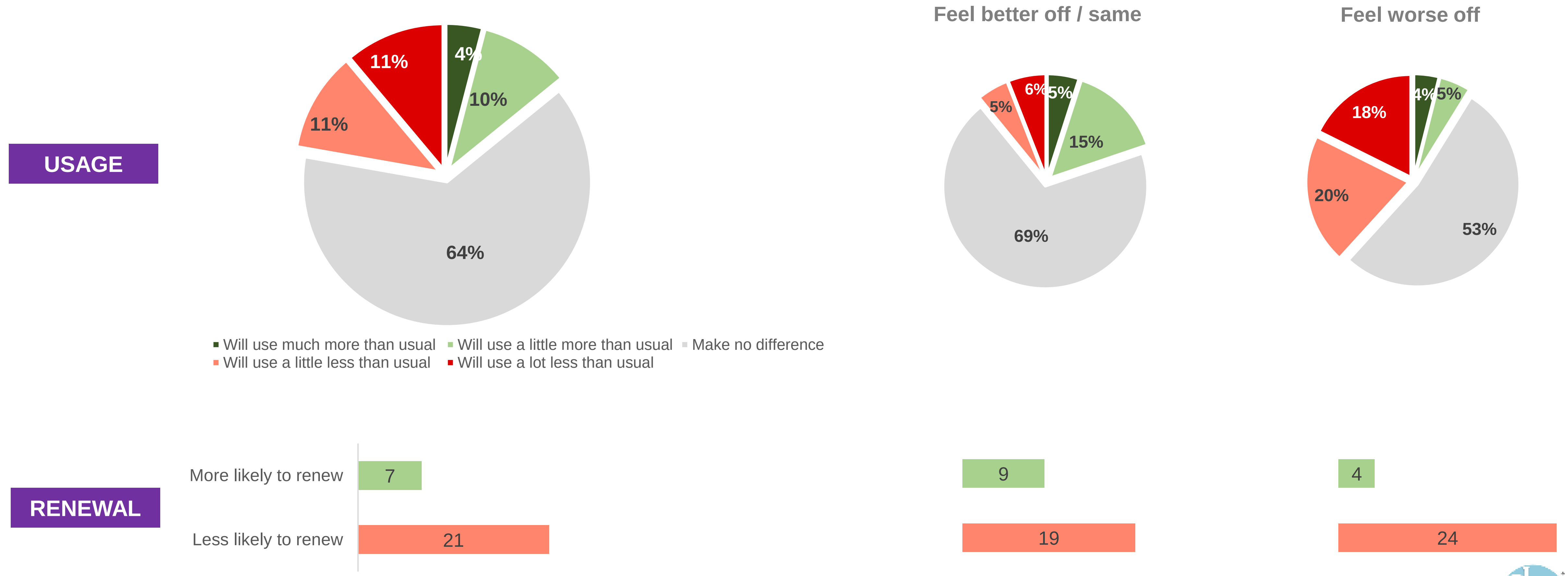
Q: How do you think that your financial situation will affect each of the following in the next few months?

Q: Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months?

Base: All respondents who have membership / season pass (June=637, Sept=613)

Once again, it is those who feel worse off who are driving this drop in renewal likelihood, although even those who are feeling better off or the same are beginning to question their renewal likelihood

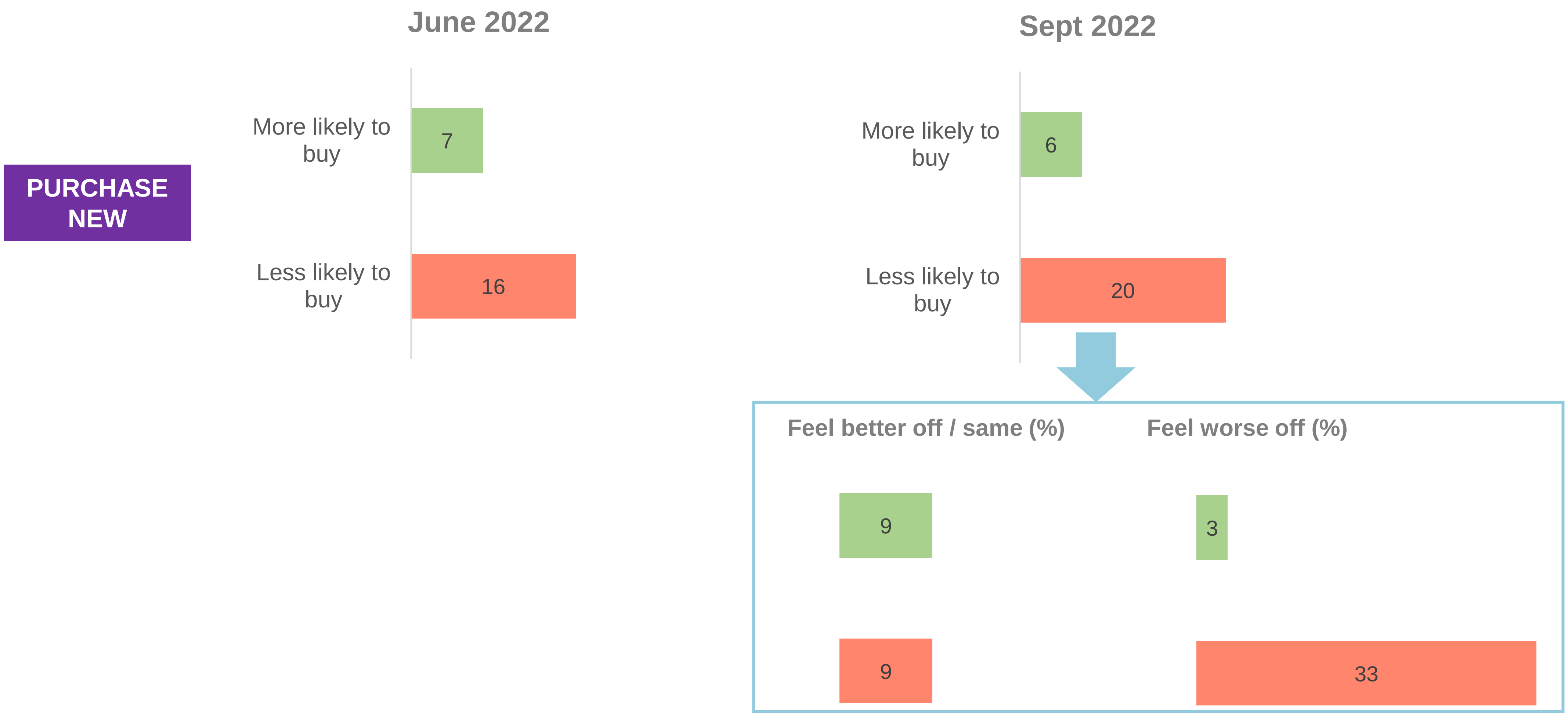
How personal financial situation will affect HOLDERS OF MEMBERSHIPS / SEASON PASSES (September 2022)



Q: How do you think that your financial situation will affect each of the following in the next few months (up to February 2023)?
Q: Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months (up to February 2023)?
Base: All respondents who have membership / season pass (613)

Acquiring new members / season pass holders is likely to be a real challenge in the coming months, particularly among that 50% who feel worse off

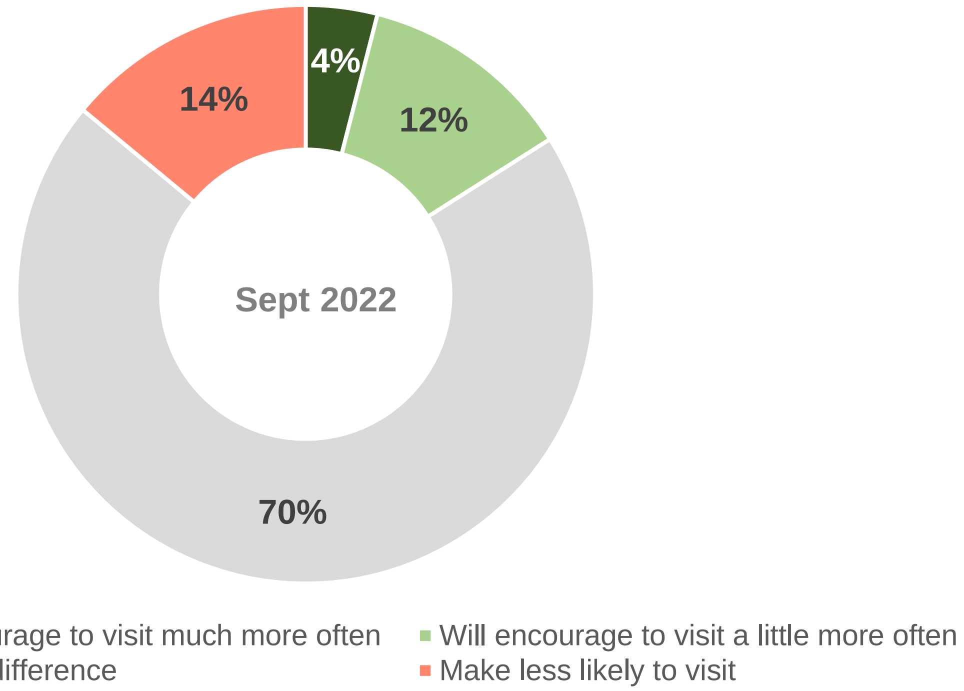
How personal financial situation will affect ACQUISITION OF MEMBERSHIPS / SEASON PASSES



Q: **Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months?**
Base: All respondents (Jun=1,020, Sep=1,017)

Although Government financial support on energy bills will have a positive impact on attraction visiting for 16% of the public, this is negated by the similar proportion who feel that they will be less likely to visit given the absolute increases in their bills

Impact of Government financial support for energy bills on attraction visiting (%)

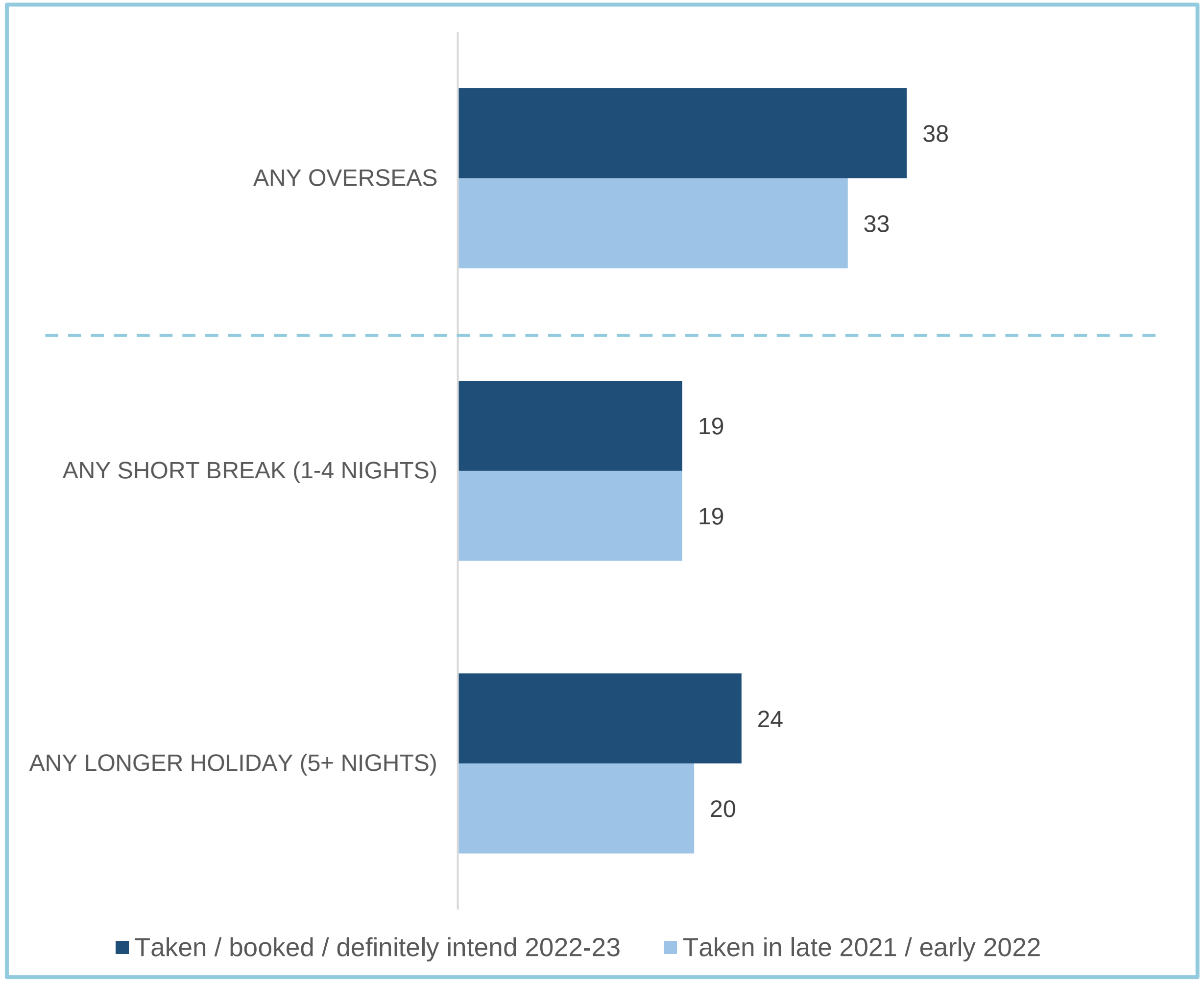


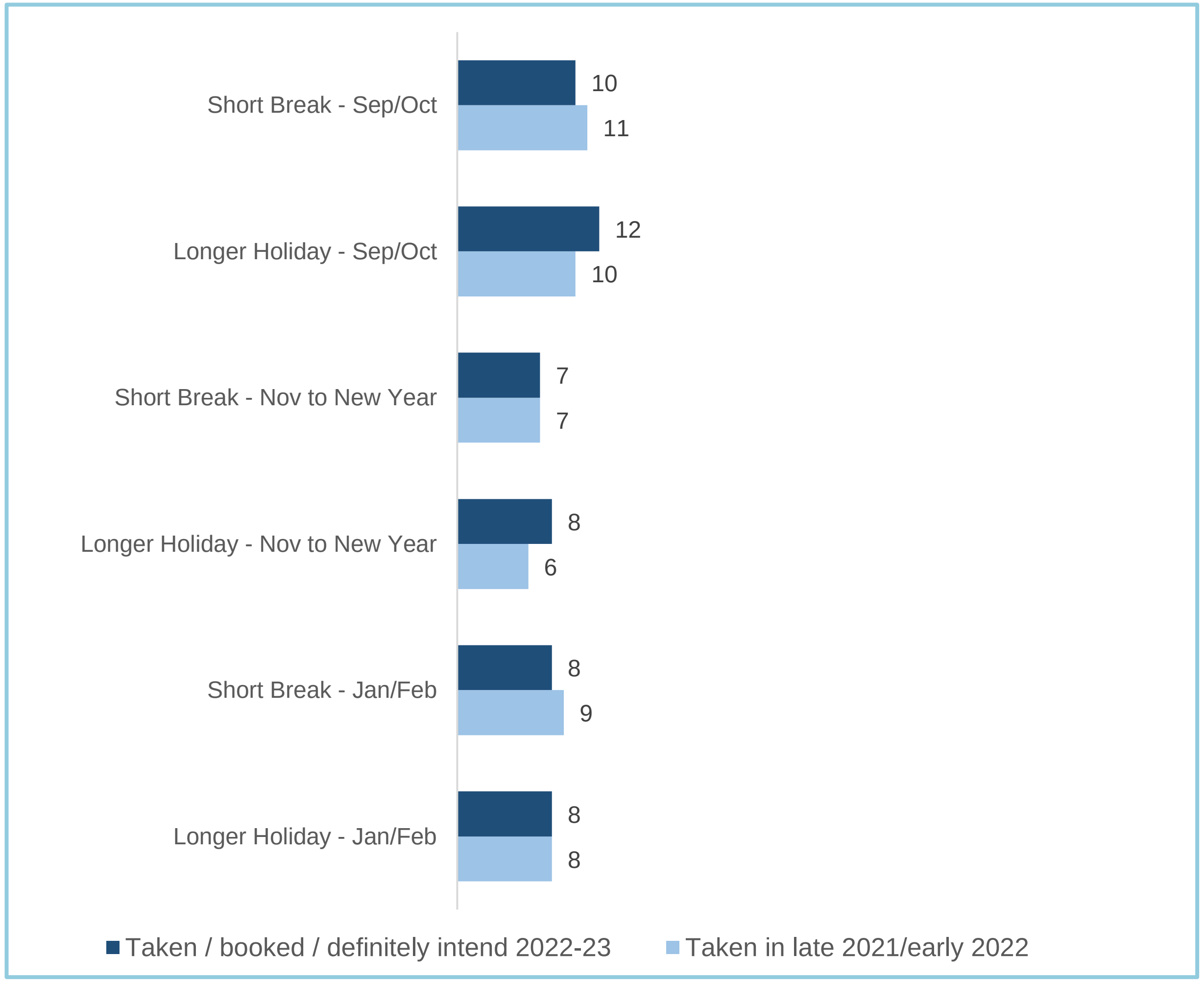
Q: The Government has recently announced financial support which caps the amount that households pay for their energy bills in the next two years. How do you think that this support will affect how often you visit attractions in the next few months (up to February next year)?

Base: All respondents (1,017)

There is also likely to be a slight increase in the taking of longer overseas holidays of 5+ nights during autumn / winter which is may also limit the opportunities for visiting UK attractions

OVERSEAS holiday taking in next few months – until February 2023 (%)





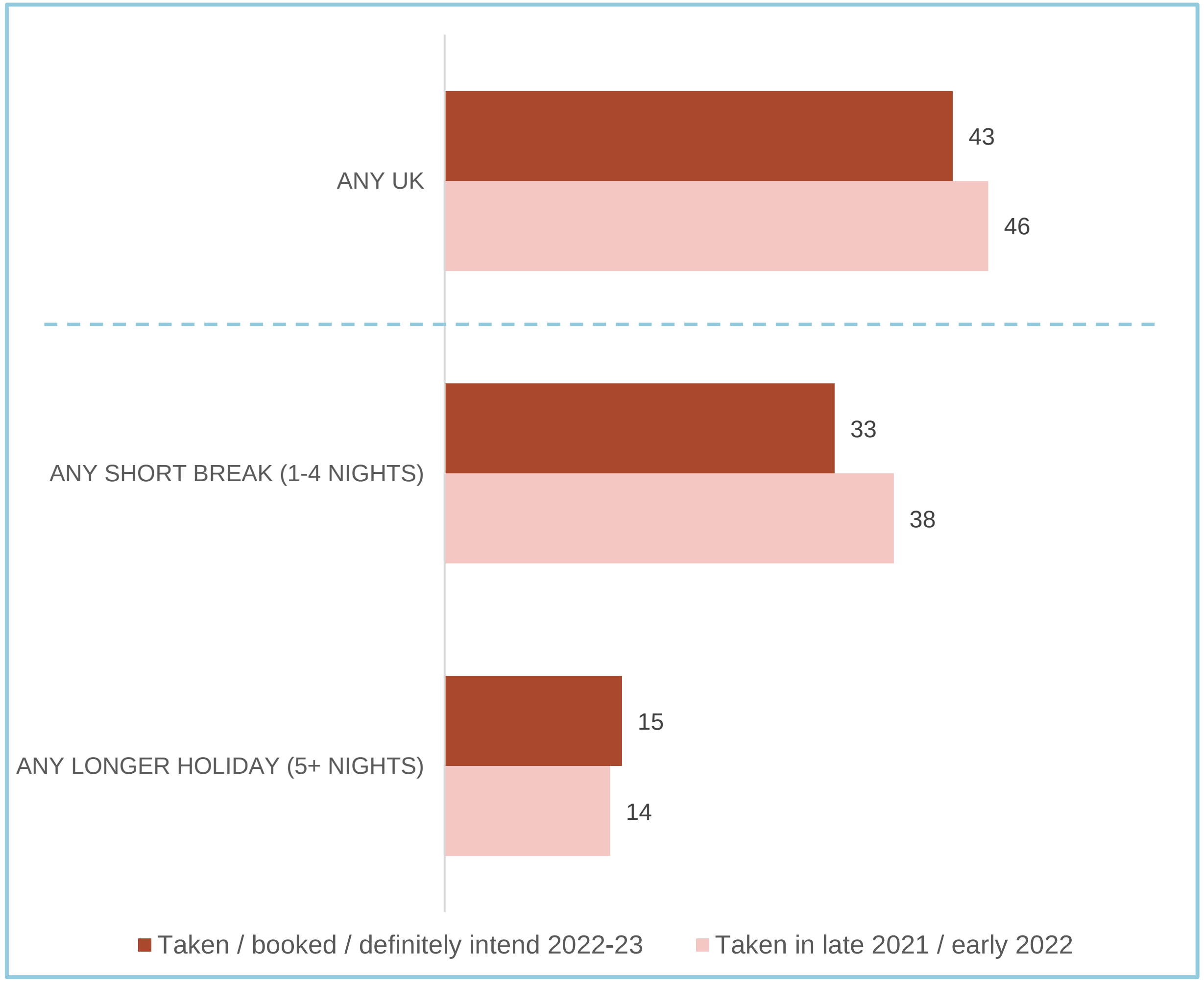
Q: Thinking about this year, which of these types of overseas holidays have you either already taken, booked or definitely intend to book? By overseas holiday, we mean a leisure trip outside of the UK where you stay in paid accommodation.

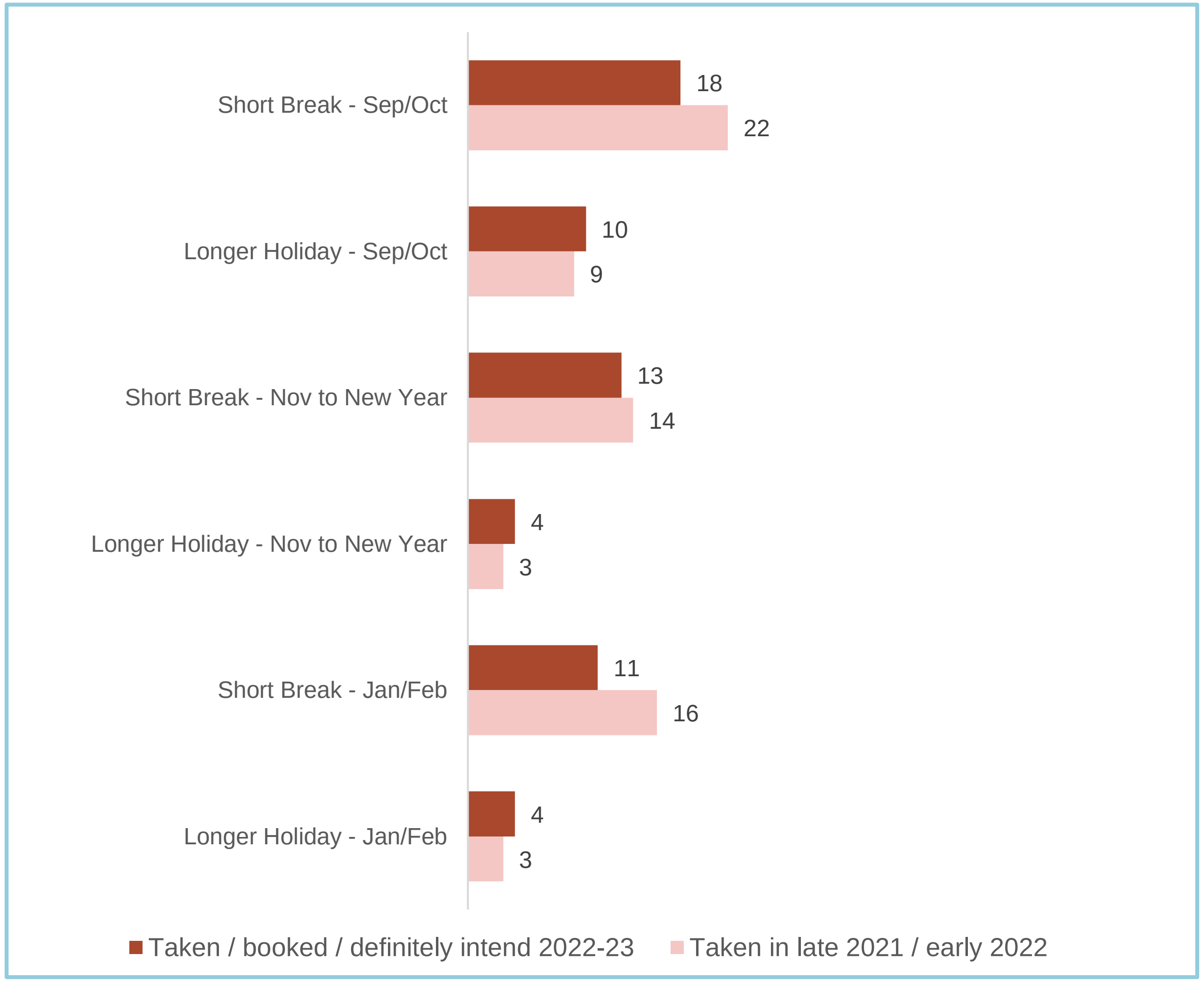
Q: Thinking back to last year, which of these types of overseas holidays did you take, so outside of the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation.

Bases: All respondents (1,017)

Conversely, it appears that domestic short breaks may be the trips most likely to be sacrificed for these longer overseas holidays – especially in Sep/Oct and Jan/Feb

UK holiday taking in next few months – until February 2023 (%)





Q: Thinking about this year, which of these types of overseas holidays have you either already taken, booked or definitely intend to book? By overseas holiday, we mean a leisure trip outside of the UK where you stay in paid accommodation.

Q: Thinking back to last year, which of these types of overseas holidays did you take, so outside of the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation.

Bases: All respondents (1,017)

Key take-outs

Key take-outs

The recovery from the Covid period is likely to continue in the coming months, although this recovery has slowed, with an increasing minority of audiences saying they will visit attractions less often than the same period last year

This slowing of the recovery is being driven by the increasing financial concerns of audiences, especially families and those on lower incomes. 24% of the public now spontaneously mention financial concerns when asked how they feel about visiting attractions compared with 16% back in June

The positive impact on attraction visiting generated by Government energy bill support is negated by those who feel that the absolute increases in their bills will still prevent them from visiting (as frequently)

For some, there appears to be an assumption that the cost of visiting attractions will rise in line with inflation. Perhaps a need for communications here to reassure and promoting a ‘value’ message?

Many are simply cutting down or removing the relative ‘luxury’ of visiting attractions, although there is strong evidence that free attractions will benefit at the expense of paid attractions, especially among the 50% of the public who are now feeling worse off than a year ago

The situation for memberships / season passes has become tougher since June, with existing members now much less likely to renew as a result of their financial situation and the public less inclined to acquire new memberships. There is now less evidence that existing members will squeeze visit value from their subscriptions, perhaps wanting to limit secondary spend occasions

The return of longer overseas holidays is also likely to continue to limit opportunities for visiting UK attractions this autumn / winter, with domestic short breaks being the trips most likely to be sacrificed

Contact

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Questionnaire: *6-10 June 2022*

***ALVA PUBLIC SENTIMENT RESEARCH* QUESTIONNAIRE – JUNE 2022**

SAMPLE DEFINITION:
- *UK adults aged 16 or over*

INTRODUCTORY TEXT: **The next few questions are about recent holidays you may have taken and any that you have planned for the next few months.**

Q1a. Thinking back to last year, which of these types of overseas holidays did you take, so outside of the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation. MARK ALL THAT APPLY
Short break (1-4 nights away) in Spring 2021 (Apr-Jun)
Longer holiday (5 or more nights away) in Spring 2021 (Apr-Jun)
Short break (1-4 nights away) in Summer 2021 (Jul-Aug)
Longer holiday (5 or more nights away) in Summer 2021 (Jul-Aug)
Short break (1-4 nights away) in Autumn 2021 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2021 (Sep-Oct)
Short break (1-4 nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Did not take an overseas holiday in 2021

Q1b. And still thinking back to last year, which of these types of holidays did you take, in the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation. MARK ALL THAT APPLY
Short break (1-4 nights away) in Spring 2021 (Apr-Jun)
Longer holiday (5 or more nights away) in Spring 2021 (Apr-Jun)
Short break (1-4 nights away) in Summer 2021 (Jul-Aug)
Longer holiday (5 or more nights away) in Summer 2021 (Jul-Aug)
Short break (1-4 nights away) in Autumn 2021 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2021 (Sep-Oct)
Short break (1-4 nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Did not take a holiday in the UK in 2021

Q2a. Now thinking about this year, which of these types of overseas holidays have you either already taken, have booked or definitely intend to book? By overseas holiday, we mean a leisure trip outside of the UK where you stay in paid accommodation. MARK ALL THAT APPLY
Short break (1-4 nights away) in Winter 2022 (Jan-Mar)
Longer holiday (5 or more nights away) in Winter 2022 (Jan-Mar)
Short break (1-4 nights away) in Spring 2022 (Apr-Jun)
Longer holiday (5 or more nights away) in Spring 2022 (Apr-Jun)
Short break (1-4 nights away) in Summer 2022 (Jul-Aug)
Longer holiday (5 or more nights away) in Summer 2022 (Jul-Aug)
Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
Short break (1-4 nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Have not taken nor intend to take an overseas holiday in 2022

Q2b. And still thinking about this year, which of these types of holidays have you either already taken, have booked or definitely intend to book in the UK? By holiday, we mean a leisure trip where you stay in paid accommodation. MARK ALL THAT APPLY
Short break (1-4 nights away) in Winter 2022 (Jan-Mar)
Longer holiday (5 or more nights away) in Winter 2022 (Jan-Mar)
Short break (1-4 nights away) in Spring 2022 (Apr-Jun)
Longer holiday (5 or more nights away) in Spring 2022 (Apr-Jun)
Short break (1-4 nights away) in Summer 2022 (Jul-Aug)
Longer holiday (5 or more nights away) in Summer 2022 (Jul-Aug)
Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
Short break (1-4 nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Have not taken nor intend to take holiday in the UK in 2022

The next few questions are about your feelings on the subject of visiting attractions in the UK. By visitor attractions we mean places like museums, art galleries, historic houses and sites, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.

Q3. Please tell us in your own words how you feel about visiting attractions in the UK at the moment and over the next three months or so. Please give as much detail as possible.
OPEN RESPONSE
____

Q4. How often do you think that you will visit each of these types of attraction in the UK in the next few months (up to the end of October) compared with the same period last year? RANDOMISE ORDER

I will visit much more often than last year, I will visit a little more often than last year, I will visit about the same as last year, I will visit a little less than last year, I will visit much less than last year, I don't tend to visit this type of attraction anyway

LIST OF ATTRACTIONS:
Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

Q5. Thinking about your financial situation now, how does this compare with about a year ago? ONE CODE ONLY
I am much better off now, I am a little better off now, About the same, I am a little worse off now, I am much worse off now, Don't know

Q6. And how do you think that your financial situation will affect each of the following in the next few months (up to the end of October)? RANDOMISE ORDER

I will visit / use much more often than usual, I will visit / use a little more often than usual, It will make no difference, I will visit / use a little less often than usual , I will visit / use much less often than usual, I don't visit / use these anyway

LIST OF ATTRACTIONS:
Visitor attractions which are free to enter
Visitor attractions where there is an entrance fee
Membership / season passes to visitor attractions e.g. National Trust, English Heritage, Merlin Pass

Q7. Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months (up to the end of October)? MULTICODING ALLOWED

It will make me more likely to renew my membership(s)/season pass(es), It will make me less likely to renew my membership(s)/season pass(es), It has / will encourage me to buy a new membership/season pass, It has / will make me less likely to buy a new membership/season pass, It will make no difference

DEMOGRAPHICS COLLECTED:
Age
Age of children in household
Gender
Region of Residence
Social Grade

Questionnaire: *22-27 September 2022*

ALVA PUBLIC SENTIMENT RESEARCH QUESTIONNAIRE – SEPTEMBER 2022

SAMPLE DEFINITION:
- *UK adults aged 16 or over*

INTRODUCTORY TEXT: The next few questions are about recent holidays you may have taken and any that you have planned for the next few months.

Q1a. Thinking back to the end of last year, which of these types of overseas holidays did you take, so outside of the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation. MARK ALL THAT APPLY
Short break (1-4 nights away) in Autumn 2021 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2021 (Sep-Oct)
Short break (1-4 nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Short break (1-4 nights away) in early 2022 (Jan-Feb)
Longer holiday (5 or more nights away) in early 2022 (Jan-Feb)
Did not take an overseas holiday during any of these periods in

Q1b. And still thinking back to last year, which of these types of holidays did you take, in the UK? By holiday, we mean a leisure trip where you stayed in paid accommodation. MARK ALL THAT APPLY
Short break (1-4 nights away) in Autumn 2021 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2021 (Sep-Oct)
Short break (1-4 nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2021 (Nov-Dec/Xmas/New Year)
Short break (1-4 nights away) in early 2022 (Jan-Feb)
Longer holiday (5 or more nights away) in early 2022 (Jan-Feb)
Did not take a holiday in the UK during any of these periods

Q2a. Now thinking about this year, which of these types of overseas holidays have you either already taken, have booked or definitely intend to book? By overseas holiday, we mean a leisure trip outside of the UK where you stay in paid accommodation. MARK ALL THAT APPLY
Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
Short break (1-4 nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Short break (1-4 nights away) in early 2023 (Jan-Feb)
Longer holiday (5 or more nights away) in early 2023 (Jan-Feb)
Have not taken nor intend to take an overseas holiday during any of these periods

Q2b. And still thinking about this year, which of these types of holidays have you either already taken, have booked or definitely intend to book in the UK? By holiday, we mean a leisure trip where you stay in paid accommodation. MARK ALL THAT APPLY
Short break (1-4 nights away) in Autumn 2022 (Sep-Oct)
Longer holiday (5 or more nights away) in Autumn 2022 (Sep-Oct)
Short break (1-4 nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Longer holiday (5 or more nights away) in Winter 2022 (Nov-Dec/Xmas/New Year)
Short break (1-4 nights away) in early 2023 (Jan-Feb)
Longer holiday (5 or more nights away) in early 2023 (Jan-Feb)
Have not taken nor intend to take a holiday in the UK during any of these periods

The next few questions are about your feelings on the subject of visiting attractions in the UK. By visitor attractions we mean places like museums, art galleries, historic houses and sites, cathedrals, zoos / animal attractions, country parks, gardens, heritage railways, distilleries / breweries or theme parks.

Q3. Please tell us in your own words how you feel about visiting attractions in the UK at the moment and over the next few months (up to February next year). Please give as much detail as possible.
OPEN RESPONSE
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Q4. How often do you think that you will visit each of these types of attraction in the UK in the next few months (up to February next year) compared with the same period last year? RANDOMISE ORDER

I will visit much more often than last year, I will visit a little more often than last year, I will visit about the same as last year, I will visit a little less than last year, I will visit much less than last year, I don't tend to visit this type of attraction anyway

LIST OF ATTRACTIONS:
Museums or art galleries
Historic houses / stately homes or palaces
Castles or historic monuments
Zoos or safari parks
Gardens
Theme parks
Country parks or nature reserves
Farm attractions

Q5. Thinking about your financial situation now, how does this compare with about a year ago? ONE CODE ONLY
I am much better off now, I am a little better off now, About the same, I am a little worse off now, I am much worse off now, Don't know

Q6. And how do you think that your financial situation will affect each of the following in the next few months (up to February next year)? RANDOMISE ORDER

I will visit / use much more often than usual, I will visit / use a little more often than usual, It will make no difference, I will visit / use a little less often than usual , I will visit / use much less often than usual, I don't visit / use these anyway

LIST OF ATTRACTIONS:
Visitor attractions which are free to enter
Visitor attractions where there is an entrance fee
Membership / season passes to visitor attractions e.g. National Trust, English Heritage, Merlin Pass
Indoor visitor attractions
Outdoor visitor attractions

Q7. Thinking about memberships and season passes for visitor attractions, how do you think your financial situation will affect whether you buy or renew these in the next few months (up to February next year)? MULTICODING ALLOWED

It will make me more likely to renew my membership(s)/season pass(es), It will make me less likely to renew my membership(s)/season pass(es), It has / will encourage me to buy a new membership/season pass, It has / will make me less likely to buy a new membership/season pass, It will make no difference

Q8. The Government has recently announced financial support which caps the amount that households pay for their energy bills in the next two years? How do you think that this support will affect how often you visit attractions in the next few months (up to February next year)? MULTICODING ALLOWED
It will encourage me to visit attractions much more often, It will encourage me to visit attractions a little more often, It will make no difference to how often I visit attractions, It will make me less likely to visit attractions

DEMOGRAPHICS COLLECTED:
Age
Age of children in household
Gender
Region of Residence
Social Grade