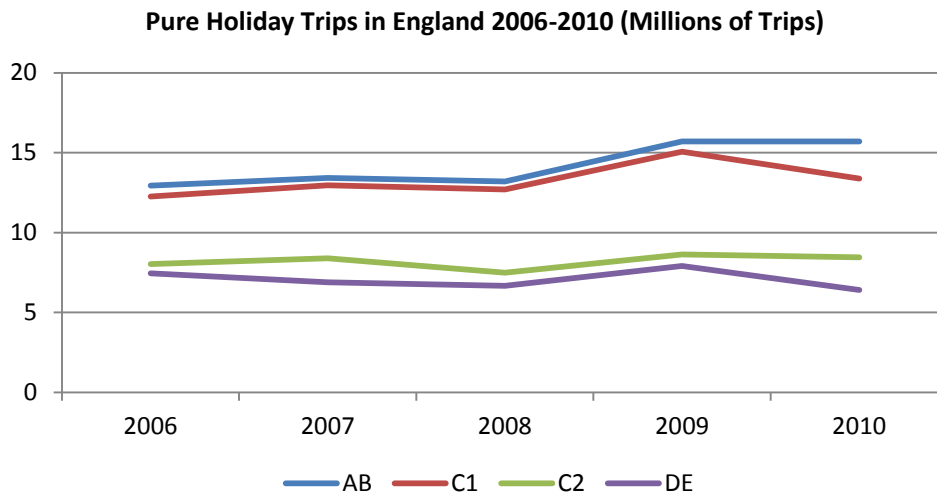


Influence of Social Grade on Domestic Overnight Tourism in England

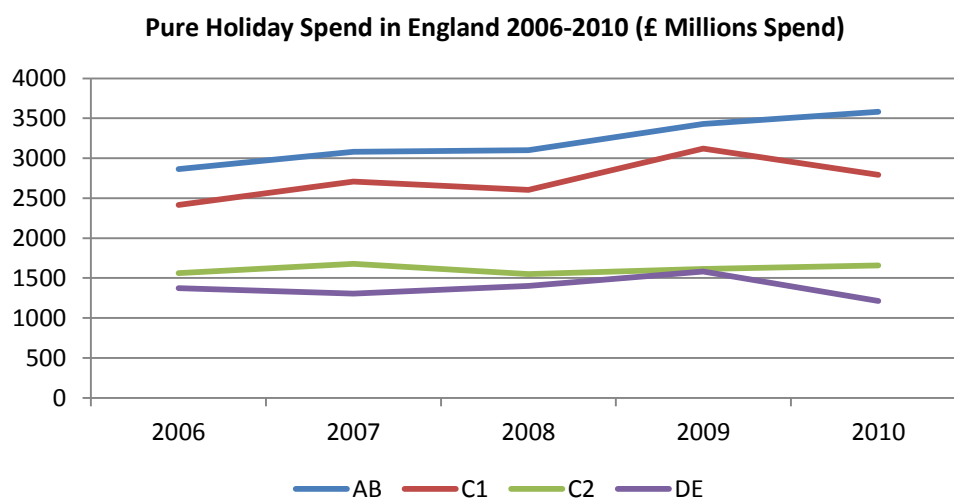
Over the last few years, results from the Great Britain Tourism Survey have indicated that there are variations in the number of trips taken by social grade; more affluent ABs and C1s take a higher proportion of domestic overnight trips and spend more than their C2 and DE counterparts. The following analysis examines the influence of social grade on trip taking behaviour in England, highlighting areas where there are key differences between these groups. For the purpose of this analysis we have particularly focussed on 'pure' holiday trips (excluding visits to friends and relatives).

1. Trends in Pure Holiday Trips in England, 2006-2010 by Social Grade



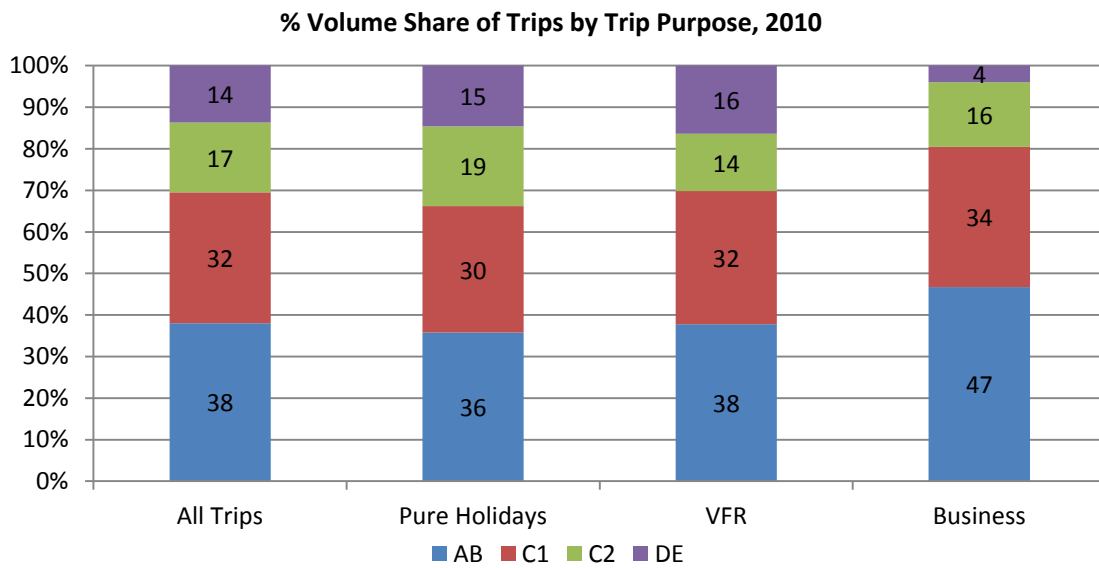
Overall, since 2006, the number of 'pure holidays' taken domestically in England has increased. However, there are differences by social grade. The volume of trips taken by ABs has increased year-on-year while at the same time, the number of trips taken by the least affluent DE social grade has fallen each year since 2006 with the exception of 2009.

2. Trends in Pure Holiday Spend in England, 2006-2010 by Social Grade



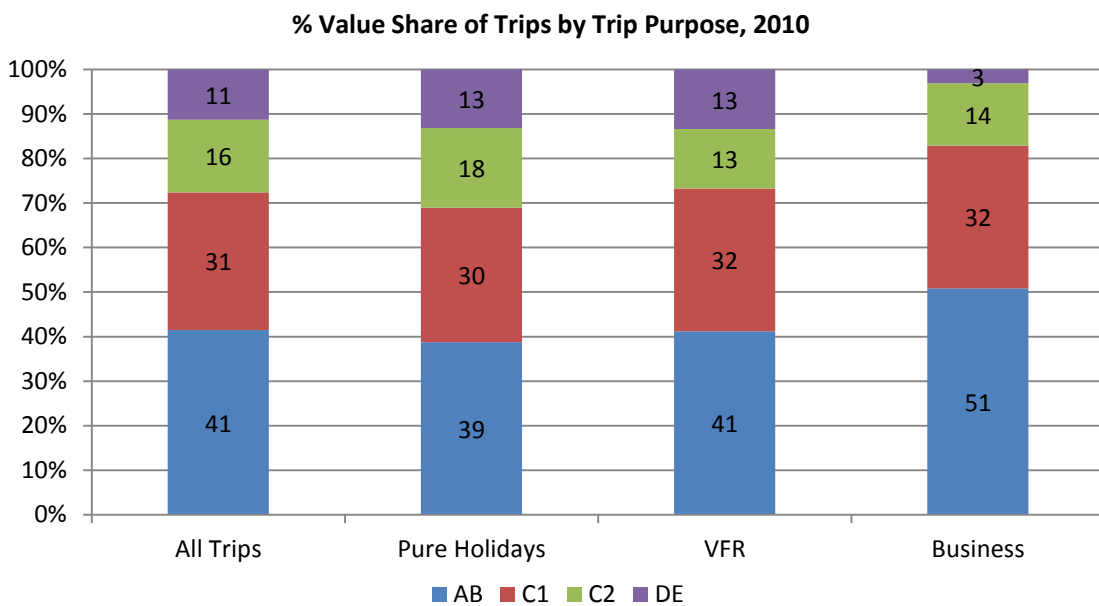
Reflecting the volume trend, ABs outperform other social grades in terms of expenditure during their holiday trips and their spending has increased continuously since 2006. However, DE spending in 2010 was down on 2006 levels but peaked in 2009.

3. Volume of Trips, by Social Grade



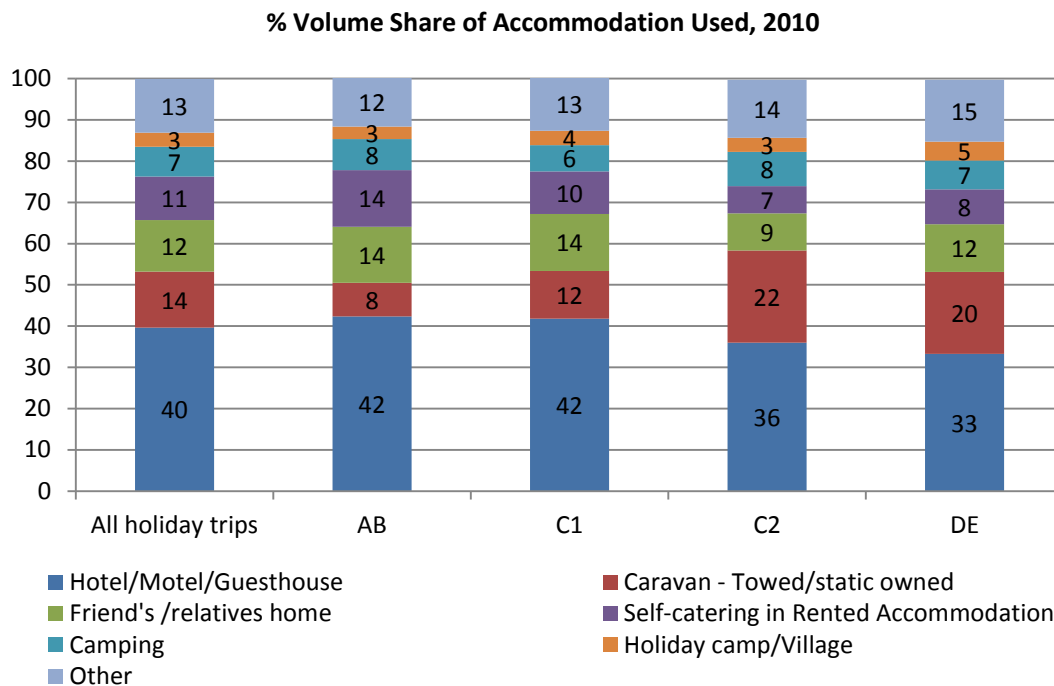
ABs over-index across all three trip purpose categories, in particular, domestic overnight business trips of which almost half are taken by ABs. At the same time, DEs are the least likely to take each trip type and account for only 4% of all business trips.

4. Value of Trips, by Social Grade



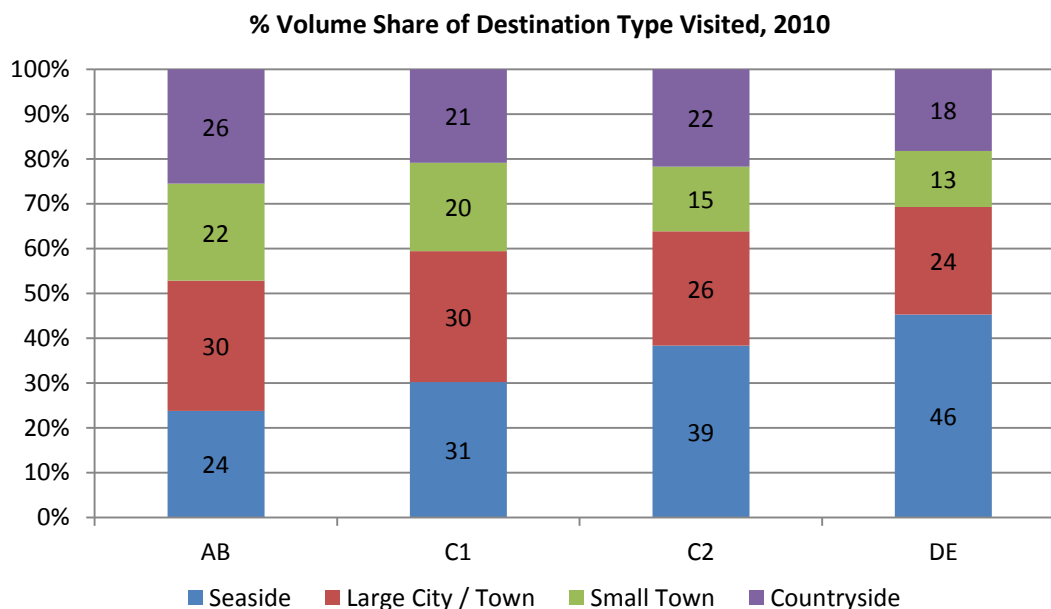
The pattern for spend is broadly similar to that of the number of trips taken, although a higher spend per trip means ABs take a slightly greater value share than volume.

5. Accommodation used on Trip, by Social Grade



Accommodation type used also varies by social grade, with the most affluent more likely to use hotels, motels or guest houses or rented self-catering accommodation on their holiday trip, while a higher proportion of C2DE trips involve staying in a static or towed caravan.

6. Destination Type Visited on Trip, by Social Grade



The seaside is more popular among lower social grades, representing 46% of DE holidays and 40% of C2 holidays compared to around a quarter of AB holidays. Small town locations account for around one fifth of AB and C1 trips compared to 15% of C2 and 13% of DE trips. Trips to the countryside feature strongest in the AB trip profile, accounting for over a quarter of all their domestic overnight holiday trips in England.