Spaces for People Attitudinal Surveys Reference number 110064/12 15/12/2020

SPACES FOR PEOPLE ATTITUDINAL SURVEYS WAVE 4 REPORT (SURVEY UNDERTAKE BETWEEN 9TH NOVEMBER AND 16TH NOVEMBER 2020)









SPACES FOR PEOPLE ATTITUDINAL SURVEYS

WAVE 4 REPORT (SURVEY UNDERTAKE BETWEEN 9TH NOVEMBER AND 16TH NOVEMBER 2020)

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TABLE OF CONTENTS

1.	INTRODUCTION	4
1.1	Арргоасн	4
1.2	This Report	4
2.	JOURNEYS IN THE LAST SEVEN DAYS	7
2.1	JOURNEY TYPES	7
2.2	WAYS OF TRAVELLING	8
2.3	WALKING AND CYCLING BEHAVIOUR	9
2.4	CHANGES IN CURRENT WALKING AND CYCLING BEHAVIOUR	10
3.	ATTITUDES TOWARDS DIFFERENT WAYS OF TRAVELLING	11
3.1	Positivity and Negativity towards Travelling by Different Methods	11
3.2	REASONS FOR NEGATIVITY AND CONCERNS TOWARDS TRAVEL	11
4.	SPACES FOR PEOPLE: AWARENESS OF MEASURES	13
4.1	Awareness of Introduction of Measures	13
4.2	METHOD OF AWARENESS	14
4.3	IMPACT OF MEASURES ON JOURNEYS	15
5.	SPACES FOR PEOPLE: ATTITUDE TOWARDS MEASURES	16
5.1	Positivity and Negativity towards Different Measures	16
5.2	REASONS FOR POSITIVITY AND NEGATIVITY	17



1. INTRODUCTION

1.1 Approach

- 1.1.1 Tactran, supported by Sustrans, commissioned an attitudinal and behavioural survey to measure the effectiveness of the Spaces for People (SfP) programme in the Tactran region and the specific measures within it.
- 1.1.2 Attitudinal surveys, delivered online and administered through a panel, will be issued by SYSTRA every month for 10 months (commencing August 2020, through to May 2021).

1.2 This Report

- 1.2.1 This report covers the main findings found in Wave 4 of 10 Waves. The data was collected between 9th November and 16th November 2020.
- 1.2.2 A total of 301 respondents took part in the survey. The data used in this report has been weighted to ensure the sample is representative of the Tactran region by age and gender. The sample comprised of respondents from Dundee (30%), Angus (26%), Perth and Kinross (29%), and Stirling (16%).
- 1.2.3 At the beginning of the survey period on Monday 9th November, Angus and Perth and Kinross were at protection Level 2, while Dundee and Stirling were at protection Level 3. On Wednesday 11th November, it was announced that Angus and Perth and Kinross would be moving protection Level 3 on Friday 13th November¹.
- 1.2.4 The Covid-19 guidelines for protection Level 2 during this survey period included²³:
 - Individuals should not meet anyone who is not in their household indoors in their home;
 - Individuals can meet another household indoors in a public place such as a café or restaurant;
 - The maximum number of people who can meet indoors in a public (not a home) place are six which can be from up to two separate households;
 - Individuals can meet people from other households outdoors in a private garden or in a public place such as a park or an outdoor area of a pub.
 - The maximum number of people who can meet outdoors is six which can be from up to two separate households;
 - Restaurants, cafes, pubs and bars can open indoors for the consumption of food and non-alcoholic drinks. Alcoholic drinks can only be served with the purchase of a main meal;
 - Last entry is 19:00 and all venues must be closed and all customers off the premises by 20:00;

Final Report

¹ Source: <u>https://www.gov.scot/publications/coronavirus-covid-19-protection-levels/</u>

² https://www.gov.scot/publications/coronavirus-covid-19-protection-levels/pages/protection-level-2/ ³ https://www.gov.scot/binaries/content/documents/govscot/publications/strategy-plan/2020/10/covid-19scotlands-strategic-framework/documents/level-2-measures/level-2-measures/govscot%3Adocument/level-2measures.pdf



- Restaurants, cafes, pubs and bars can open outdoors for the consumption of food and alcoholic drinks. Last entry is 21:30 and all venues must be closed and all customers off the premises by 22:30;
- The maximum number of people Individuals can meet indoors and outdoors in a restaurant, café, pub or bar is six which can be from up to two separate households;
- All holiday accommodation (Hotels, B&Bs, self-catering, caravan and camping sites) can stay open, in line with sector guidance for tourism and hospitality;
- All retailers can open providing they follow and have implemented Scottish Government guidance to ensure the safety of customers and staff;
- Individuals must wear a face covering when Individuals go into any retail premises including any indoor area of a shopping centre, unless exempt;
- Individuals are permitted to meet others outdoors, following the rules around meeting other households, for informal exercise or sport;
- Driving lessons are permitted;
- The following businesses must be closed, with very limited exceptions: soft play; funfairs; indoor bowling; theatres; snooker/pool halls; concert halls; comedy clubs; casinos; nightclubs; adult entertainment;
- Cinemas and bingo halls can be open, and should operate in line with guidance, physical distancing duties, face covering regulations and other hygiene measures;
- Public buildings such as libraries or community centres can open to the public;
- All indoor and outdoor visitor attractions such as museums, galleries, educational and heritage attractions, zoos and aquariums can open providing there are physical distancing and hygiene measures in place.
- Schools can remain open;
- Colleges and universities can operate using a mix of face to face and distance learning;
- Essential travel only to/from level 3 or 4 areas in Scotland, and to/from rest of UK;
- Minimise unnecessary journeys between areas in different levels;
- Active travel is encouraged where possible;
- Face coverings are mandatory on public transport;
- Individuals are asked to avoid car sharing with people not in their household.
- 1.2.5 The Covid-19 guidelines for protection Level 3 during this survey period included⁴⁵:
 - Individuals should not meet anyone who is not in their household indoors in their home;
 - Individuals may meet another household indoors in a public place, such as a case of restaurant;
 - The maximum number of people who can meet indoors in a public place is six people which can be from two separate households;
 - Individuals may go into another household to provide care and support for a vulnerable person;
 - Restaurants, cafes, pubs and bars can open indoors and outdoors for the consumption of food and non-alcoholic drinks. Alcoholic drinks cannot be served;

Spaces for People Attitudinal Surveys

⁴ <u>https://www.gov.scot/publications/coronavirus-covid-19-protection-levels/pages/protection-level-3/</u>
⁵ <u>https://www.gov.scot/binaries/content/documents/govscot/publications/strategy-plan/2020/10/covid-19-</u>
<u>scotlands-strategic-framework/documents/level-3-measures/level-3-measures/govscot%3Adocument/level-3-measures.pdf</u>



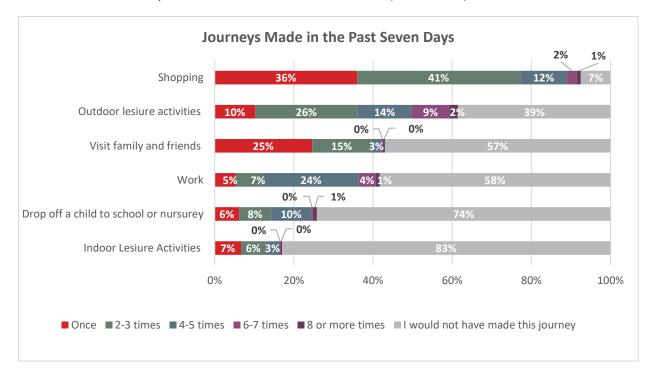
- Table service and the wearing of face-coverings (unless exempt) when not seated by all customers is mandatory in all hospitality venues;
- All holiday accommodation (hotels, B&Bs, self-catering, caravan and camping sites) can stay open in line with sector guidance for tourism and hospitality
- Tourists should not travel into, or out off, a Level 3 area for holidays or visits;
- Individuals must not travel into or out of Level 3 and 4 local authority areas except for essential reasons;
- On public transport, face coverings are mandatory;
- Individuals should avoid sharing in a vehicle with people who are not members of their household or extended household as much as possible;
- Use of public transport should be for essential purposes only;
- All retailers can open providing they follow and have implemented Scottish Government guidance to ensure the safety of customers and staff;
- Mobile close contact service providers must not operate in level 3 with the exception of hairdressers and barbers;
- Stadia must be closed to spectators. No live events are permitted;
- You are permitted to meet others outdoors, following the rules around meeting other households, for informal exercise or sport;
- All leisure and entertainment premises must be closed (except for use in limited circumstances);
- Public buildings such as libraries or community centres can open to the public;
- All indoor and outdoor visitor attractions such as museums, galleries, educational and heritage attractions, zoos and aquariums can open providing there are physical distancing and hygiene measures in place;
- Schools can remain open;
- Colleges and universities can operate using a more restricted mix of face to face and distance learning;
- People are advised to work from home wherever that is practicable.



2. JOURNEYS IN THE LAST SEVEN DAYS

2.1 **Journey Types**

- 2.1.1 All respondents made a least one type of journey in the last seven days.
- 2.1.2 Within this time, the most frequently made trip was for shopping, with around nine in ten respondents (93%) making this trip at least once, and three quarters (77%) making it between one and three times. Respondents from cities or large town centres or suburbs were more likely to have made a shopping trip at least once in the last seven days, compared to those from small towns, villages or rural areas (99% vs 85%).
- 2.1.3 Almost two thirds of respondents (61%) took part in outdoor leisure activities and just over four in ten (43%) travelled to visit family and friends. This is a continued decrease in those who visited their family and friends over time with 60% doing so in Wave 1, 51% in Wave 2 and 45% in Wave 3.
- 2.1.4 Over four in ten respondents (42%) had travelled to work at least once in the last seven days, over a guarter (26%) had dropped off a child at school or nursery, and less than a fifth (17%) had travelled to an indoor leisure activity. Respondents in Dundee were more likely to have made at least one trip to drop off their child to school or nursery in the last seven compared to those from Perth and Kinross (39% vs 16%).

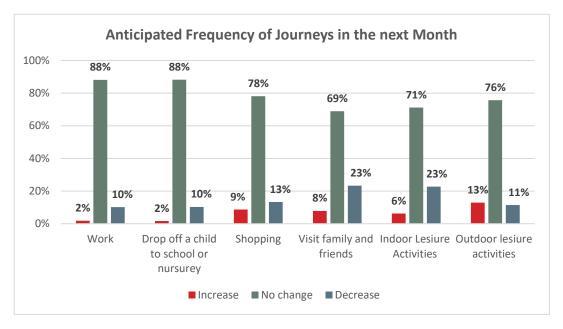


- 2.1.5 If Covid-19 travel restrictions and guidance were not in place, respondents reported that they would have made more journeys in the last seven days. This includes:
 - 0 Three and half times as many average trips to indoor leisure activities; 0
 - Twice as many average trips to visit friends and family.

Spaces for People Attitudinal Surveys		
Wave 4 Report (Survey undertake between 9th November and 16th November 2020)	110064/12	
Final Report	15/12/2020	Page 7/ 20



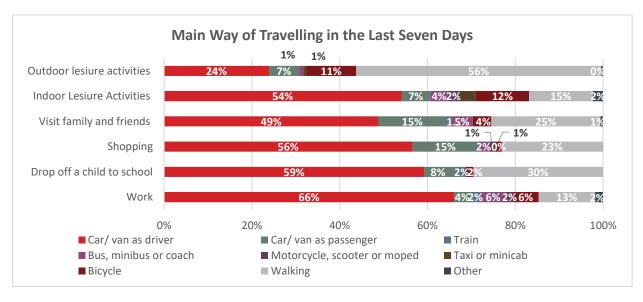
2.1.6 The majority of respondents did not anticipate a change in how frequently they would undertake these types of journeys in the next month or so. Around a quarter, however, did anticipate a decrease in how often they would travel to indoor leisure activities (23%) and to visit family and friends (23%).



2.2 Ways of Travelling

- 2.2.1 Travelling by car, as a driver or passenger, was the most frequently used way of travelling for all journey types, with the exception of journeys for outdoor leisure activities, where journeys were made by walking (56%) more frequently than by car (31%).
- 2.2.2 Walking was the main way of travelling for almost a third (30%) of respondents who dropped off their child at school or nursery, and around a quarter of those who visited family and friends (25%) and went shopping (23%).
- 2.2.3 Cycling was the main way of travelling for around one in ten respondents when making a journey to indoor leisure activities (12%), and outdoor leisure activities (11%).
- 2.2.4 Respondents from cities or large town centres/suburbs were more likely to have made a journey to work by walking or cycling, compared to those from small towns, villages or rural areas (28% vs 6%).

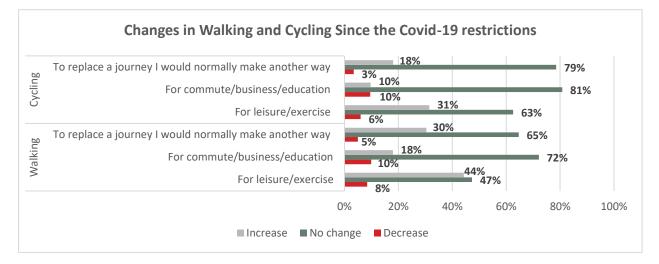




- 2.2.5 The majority of respondents did not think they would change how much they use different ways of travelling in the next month or so. Notably however, around a fifth anticipated a decrease in how much they would use a bus, minibus or coach (21%), the train (20%), or a taxi or minicab (19%).
- 2.2.6 Around a quarter of respondents (23%) anticipated an increase in how much they will walk over the next month or so, while 8% anticipated an increase in how much they will travel by bicycle.

2.3 Walking and Cycling Behaviour

- 2.3.1 Of respondents who walked and cycled for leisure/exercise, over two fifths (44%) reported an increase in the amount of time they spent walking since Covid-19 restrictions were introduced, and three in ten (31%) reported an increase in the amount of time they spent cycling for this reason.
- 2.3.2 Almost a third of respondents (30%) reported an increase in walking to replace a journey normally made another way, and almost a fifth (18%) reported an increase in cycling for this same purpose.

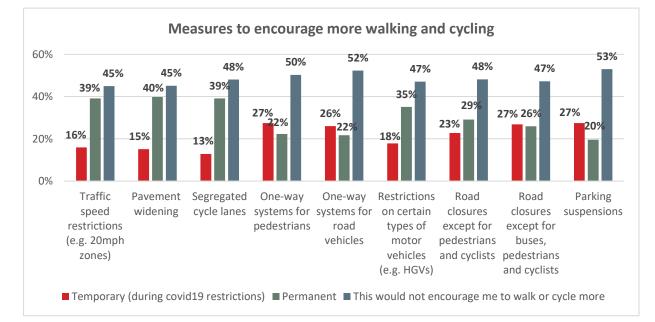


Spaces for People Attitudinal Surveys		
Wave 4 Report (Survey undertake between 9th November and 16th November 2020)	110064/12	
Final Report	15/12/2020	Page 9/ 20



2.4 Changes in Current Walking and Cycling Behaviour

- 2.4.1 Positively, around eight in ten respondents suggested that they would continue their reported increased amount of walking (86%) and cycling (84%) for leisure/exercise purposes.
- 2.4.2 Of those who reported awareness of the measures and an increase in cycling, over half (53%) suggested that the introduction of the Spaces for People measures had an impact on their increased leisure/exercise walking. Almost two thirds (64%) reported the measures had an impact on their increased leisure cycling.
- 2.4.3 Respondents from Dundee were more likely to suggest that the introduction of the Spaces for People measures had an impact on their increased walking for leisure/exercise, compared to those from Angus (69% vs 31%).
- 2.4.4 Respondents were asked if certain measures would encourage them to walk and cycle more, and whether they would want the measures on just a temporary basis (i.e. during Covid-19 restrictions) or on a longer term, more permanent basis.
- 2.4.5 For each of the different measures, around half of respondents suggested that the measure would encourage them to walk or cycle more, and would prefer the measures to be in place either on a temporary or permanent basis.
- 2.4.6 More specifically, over half suggested that traffic speed restrictions (e.g. 20mph zones) (55%); pavement widening (55%); restrictions on certain types of motor vehicles (e.g. HGVs) (53%); and road closures except for buses, pedestrians and cyclists (53%), would encourage them to walk or cycle more.



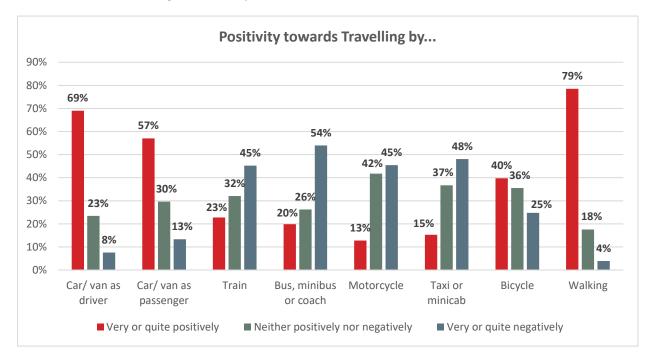
Spaces for People Attitudinal Surveys		
Wave 4 Report (Survey undertake between 9th November and 16th November 2020)	110064/12	
Final Report	15/12/2020	Page 10/ 20



3. ATTITUDES TOWARDS DIFFERENT WAYS OF TRAVELLING

3.1 Positivity and Negativity towards Travelling by Different Methods

- 3.1.1 Almost seven in ten (69%) felt positively towards travelling by car or van as a driver, and over half (57%) felt this way towards travelling by car or van as a passenger.
- 3.1.2 Over three quarters (79%) felt positively towards travelling by walking, while two fifths of respondents (40%) felt positively towards cycling.
- 3.1.3 More than twice as many respondents felt negatively towards travelling by public and shared transport, than felt positively. Specifically, more than four in ten respondents reported feeling negatively towards travelling by bus, minibus or coach (54%), taxi or minicab (48%), and train (45%).



3.1.4 These findings are broadly similar to Wave 3.

3.2 Reasons for Negativity and Concerns towards Travel

- 3.2.1 Of those who reported negative attitudes towards travelling by train, the most common reasons were:
 - Concern over catching coronavirus / other illness (57%);
 - Concerns over ability to maintain social distancing (46%);
 - Concerns that social distancing may not be in place (45%);
 - Behaviour of other passengers (42%);
 - Overcrowded (29%).
- 3.2.2 Of those who reported negative attitudes towards travelling by bus, the common reasons were:

Spaces for People Attitudinal Surveys		
Wave 4 Report (Survey undertake between 9th November and 16th November 2020)	110064/12	
Final Report	15/12/2020	Page 11/20



- Concern over catching coronavirus / other illness (57%);
- Concerns over ability to maintain social distancing (53%);
- Concerns that social distancing may not be in place (46%);
- Travelling by car is easier / more convenient (42%);
- Behaviour of other passengers (38%).
- 3.2.3 Over three quarters of respondents reported being strongly or somewhat concerned about people spreading or contracting the virus whilst using the train (73%) and the bus (78%).
- 3.2.4 Conversely, less than a fifth of respondents suggested they were concerned about the spreading of the virus while walking (19%) and cycling (15%).
- 3.2.5 Respondents from cities or large town centres or suburbs were more likely to report that they are concerned about catching the virus whilst walking, compared to those from small towns, villages or rural areas (24% vs 13%).

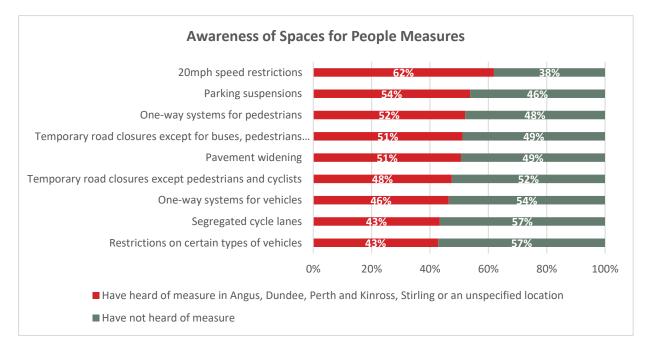


4. SPACES FOR PEOPLE: AWARENESS OF MEASURES

4.1 Awareness of Introduction of Measures

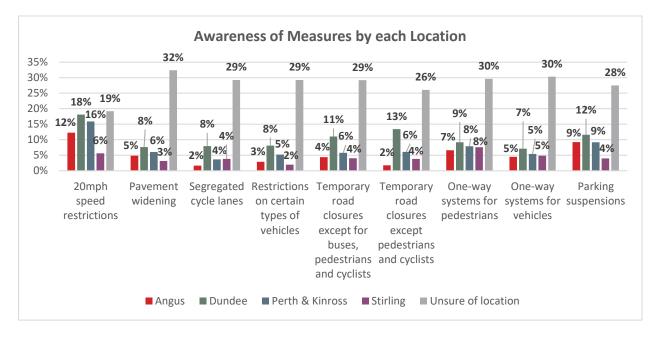
- 4.1.1 Respondents had different levels of awareness for each of the Spaces for People Measures, with differences also seen by area.
- 4.1.2 The highest level of awareness amongst respondents was for 20mph speed restriction measures, with almost two thirds (62%) being aware of the measure in either Angus, Dundee, Perth and Kinross, Stirling or an unspecified location. Restrictions on certain types of vehicles had the lowest amount of awareness (43%).





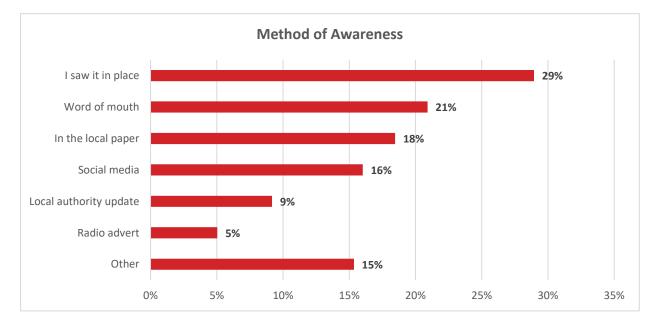
- 4.1.4 Awareness of the measures in Angus, Dundee, Perth and Kinross and Stirling significantly differed. Generally, the majority of respondents who did have awareness of the measures, were unable to specify the location of the measures.
- 4.1.5 In general, measures in Dundee had the highest awareness, with 18% aware of 20mph speed restrictions, 13% aware of temporary road closures except pedestrians and cyclists, and 12% aware of parking suspensions.
- 4.1.6 Measures in Perth and Kinross had the second highest level of awareness, with 16% aware of 20mph speed restrictions, and one in ten (9%) were aware of parking suspensions in the area.
- 4.1.7 Measures in Angus and Stirling had the lowest level of awareness. No more than 12% of respondents were aware of any specific measures in Angus, while no more than 8% were aware of specific measures in Stirling.





4.2 Method of Awareness

- 4.2.1 On average, the most common way respondents reported becoming aware of the measures was by seeing them in place (29%). Almost a fifth were made aware by word of mouth (21%), and the local paper (18%), while 16% were made aware of the measures via social media.
- 4.2.2 Just under one in ten (9%) were made aware via a local authority update and just 5% had become aware from a radio advert.



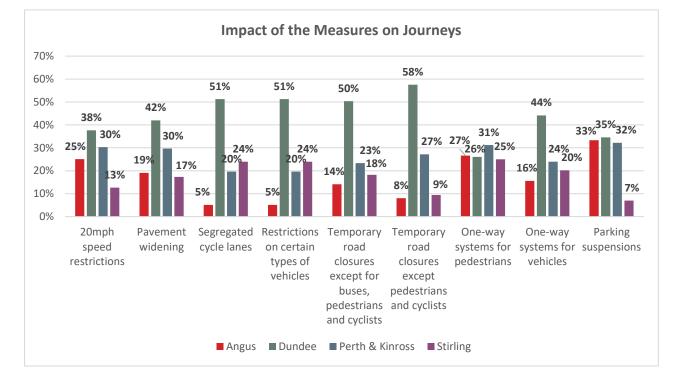
4.2.3 Method of awareness is broadly similar to Wave 3 findings.

Spaces for People Attitudinal Surveys		
Wave 4 Report (Survey undertake between 9th November and 16th November 2020)	110064/12	
Final Report	15/12/2020	Page 14/ 20



4.3 Impact of Measures on Journeys

- 4.3.1 Of the respondents who had heard of a measure in at least one of the four specified locations (59%), all had experienced at least one journey which was impacted by at least one of the measures.
- 4.3.2 Of these respondents, the most frequently cited location in which respondents had experienced an impacted journey was Dundee. Almost six in ten (58%) were impacted by temporary road closures except pedestrians and cyclists, and by restrictions on certain types of vehicles in Dundee. Around half were impacted by temporary road closures except for buses, pedestrians and cyclists (50%).
- 4.3.3 Journeys were least impacted in Angus, with less than one in ten impacted by temporary road closures except pedestrians and cyclists (8%); segregated cycle lanes (5%).



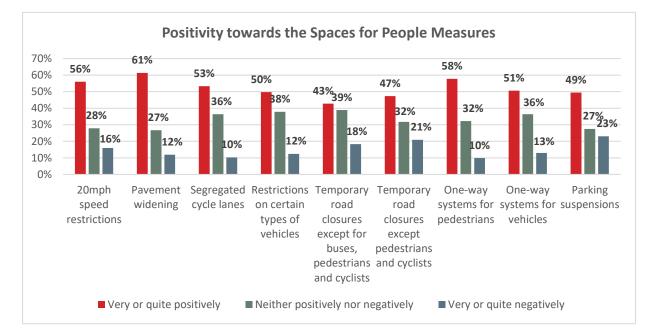
Spaces for People Attitudinal Surveys		
Wave 4 Report (Survey undertake between 9th November and 16th November 2020)	110064/12	
Final Report	15/12/2020	Page 15/ 20



5. SPACES FOR PEOPLE: ATTITUDE TOWARDS MEASURES

5.1 Positivity and Negativity towards Different Measures

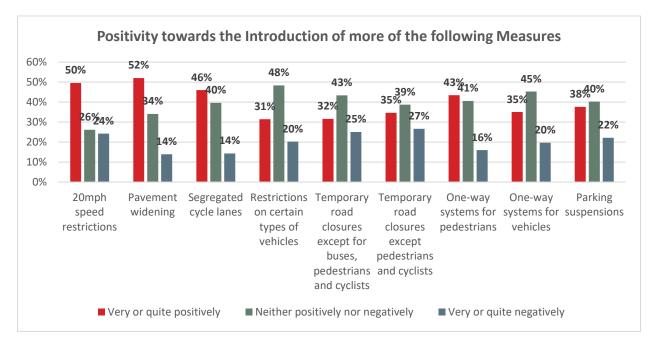
- 5.1.1 Of those who were aware of the measures, at least twice as many respondents felt positively towards each of the measures than felt negatively, and for most measures three times as many people felt positively than felt negatively. At least a quarter felt neutrally towards the measures.
- 5.1.2 Pavement widening was the most positively rated measure, with six in ten (61%) reporting that they felt positively.
- 5.1.3 Over half of respondents felt positively towards: one-way systems for pedestrians (58%);
 20mph speed restrictions (56%); segregated cycle lanes (53%); one-way systems for vehicles (51%).



- 5.1.4 Respondents were asked how they felt towards implementing more of each type of the Spaces for People measures, and at least three in ten felt positively, while at least a quarter felt neutrally.
- 5.1.5 Measures for which there was most positivity towards further introduction were: pavement widening (52%); 20mph speed restrictions (50%); segregated cycle lanes (46%).
- 5.1.6 Measures for which there was most negativity towards further introduction were: temporary road closures except pedestrians and cyclists (27%); temporary road closures except for buses, pedestrians and cyclists (25%); and 20mph speed restrictions (24%).
- 5.1.7 Respondents from Perth and Kinross (34%) and Stirling (36%) were more likely to feel negatively towards temporary road closures except for buses, pedestrians and cyclists, compared to respondents from Dundee (14%) and Angus (20%).

Spaces for People Attitudinal Surveys		
Wave 4 Report (Survey undertake between 9th November and 16th November 2020)	110064/12	
Final Report	15/12/2020	Page 16/ 20





5.1.8 Levels of positivity towards the measures are broadly similar to Wave 3, while the implementations (or of more) of the measures were rated somewhat less positively compared to Wave 3.

5.2 Reasons for Positivity and Negativity

5.2.1 Respondents who reported feeling positively or negatively towards the current measures or towards the potential implementation of the measures (or more of them) cited a number reasons for their feelings.

20mph speed restrictions

- 5.2.2 Reasons most frequently cited for feeling positively towards 20mph speed restrictions included: I feel safer walking (48%); improves air quality (32%); and I feel safer cycling (31%).
- 5.2.3 Reasons most frequently cited for feeling negatively included: traffic moving too slowly (79%); increased traffic on roads (21%); and reduced road space for cars/motor vehicles (15%).

Pavement widening

- 5.2.4 Reasons most frequently cited for feeling positively towards pavement widening included: I feel safer walking (58%); it makes it easier to maintain social distancing when walking (52%); and encourages walking (39%).
- 5.2.5 Reasons most frequently cited for feeling negatively included: reduced road space for cars/motor vehicles (52%); it does not make me feel safer walking (39%); and unable to park to access shops (18%).



Segregated cycle lanes

- 5.2.6 Reasons most frequently cited for feeling positively towards segregated cycle lanes included: encourages cycling (50%); I feel safer cycling (44%); and it makes it easier to maintain social distancing when cycling (25%).
- 5.2.7 Reasons most frequently cited for feeling negatively included: reduced road space for cars/motor vehicles (59%); it does not make me feel safer walking (32%); and traffic moving too slowly (15%).

Restrictions on certain types of vehicles

- 5.2.8 Reasons most frequently cited for feeling positively towards restrictions on certain types of vehicles included: it means there is less traffic on the roads (48%); improves air quality (45%); and I feel safer cycling (24%).
- 5.2.9 Reasons most frequently cited for feeling negatively included: reduced road space for cars/motor vehicles (45%); unable to park to access shops (24%); and traffic moving too slowly (20%).

Temporary road closures except for buses, pedestrians and cyclists

- 5.2.10 Reasons most frequently cited for feeling positively towards temporary road closures except for buses, pedestrians and cyclists included: encourages walking (42%); improves air quality (36%); and it means there is less traffic on the roads (32%).
- 5.2.11 Reasons cited for feeling negatively included: reduced road space for cars/motor vehicles (41%); traffic moving too slowly (32%); and unable to park to access shops (28%).

Temporary road closures except pedestrians and cyclists

- 5.2.12 Reasons most frequently cited for feeling positively towards temporary road closures except pedestrians and cyclists included: encourages walking (42%); encourages cycling (39%); and I feel safer walking (38%).
- 5.2.13 Reasons most frequently cited for feeling negatively included: reduced road space for cars/motor vehicles (34%); unable to park to access shops (33%); and traffic moving too slowly (32%).

One-way systems for pedestrians

- 5.2.14 Reasons most frequently cited for feeling positively towards one-way systems for pedestrians included: it makes it easier to maintain social distancing when walking (52%); I feel safer walking (51%); and encourages walking (32%).
- 5.2.15 Reasons most frequently cited for feeling negatively included: one-way systems are confusing (47%); it does not make me feel safer walking (38%); and reduced road space for cars/motor vehicles (9%).



One-way systems for vehicles

- 5.2.16 Reasons most frequently cited for feeling positively towards one-way systems for vehicles included: it means there is less traffic on the roads (39%); I feel safer walking (26%); and improves air quality (22%).
- 5.2.17 Reasons most frequently cited for feeling negatively included: one-way systems are confusing (57%); traffic moving too slowly (28%); and it does not make me feel safer walking (23%).

Parking suspensions

- 5.2.18 Reasons most frequently cited for feeling positively towards parking suspensions included: it means there is less traffic on the roads (38%); encourages walking (21%); and improves air quality (20%).
- 5.2.19 Reasons most frequently cited for feeling negatively included: unable to park to access shops (62%); reduced road space for cars/motor vehicles (28%); and increased traffic on roads (16%).

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