



# Motorway Services User Survey

Spring 2017



# Foreword

Since we started representing users of the Strategic Road Network, Transport Focus has built a good body of evidence on road users' experiences. This work now goes a step further, to consider the facilities available on these roads.

**M**otorway service areas (MSAs) play an important role in the experience of those using the Highways England road network to make long distance journeys. This can be the opportunity for a short break to use the toilet and refuel a vehicle, or a longer stop to get food and drink and have a rest.

For many professional drivers, such as lorry drivers, these breaks are both a legal requirement and a major feature of their working life. MSAs perform an essential road safety function – they must provide the right environment and facilities for visitors to rest and recharge before continuing to drive.

In 2016 we spoke to people in focus groups to explore their views about roadside facilities on England's motorways and major 'A' roads. We have followed this up with a large-scale survey focusing on the experience of visitors to all 112 of England's MSAs.

In this survey we have measured satisfaction among different types of visitor, identified which aspects of the visitor experience most influence overall satisfaction and explored the effect that visiting an MSA has on the road user's mood.

Among the 8700 visitors we spoke to, overall satisfaction is high at 90 per cent, with only

three per cent dissatisfied. This is impressive and indicates that, overall, MSA operators are providing what road users want and are doing it well. Satisfaction is high regardless of which company operates the MSA. Nevertheless there are differences between the various MSA operators, in particular in the proportion of very satisfied visitors, and some aspects of the experience are rated more highly than others. There are also variations among visitor types; satisfaction is lower among professional drivers, although still 84 per cent.

The information provided in this survey will I am sure be used to great effect by the MSA operators to deliver even higher levels of satisfaction in future. Transport Focus hopes to work with the industry to repeat this survey annually, allowing us to build an ongoing picture of customer experience and track improvements over time.

A handwritten signature in black ink that reads "Jeff Halliwell". The signature is written in a cursive, slightly slanted style.

**Jeff Halliwell**  
Chair



# Summary

The purpose of this study was to understand how road users feel about their experience at MSAs. The results tell us that the customer experience is a good one, with the vast majority (90 per cent) satisfied with their visit and more than half (58 per cent) describing themselves as 'very' satisfied.

**The needs of MSA visitors are largely functional, for example, to use the toilet and buy something to eat and drink. Visitors' ratings show that MSAs are doing a good job of meeting these basic needs. People say they are satisfied because the MSA is clean and tidy, reliable and has a good variety of food options.**

It is reassuring to see high ratings for both the number of toilets available and their cleanliness. However, among the very few who are dissatisfied, dirty toilets is frequently mentioned as the reason. This indicates that, while toilets on the whole are meeting people's expectations, where there are failings they can have a significant impact on the overall experience – delivering consistently high standards is the key here.

Good, fast customer service and friendly, helpful staff are both reasons visitors say they are satisfied with the overall experience. The friendliness of staff, speed of service and quality of food and drink are all rated highly.

Ratings for value for money are generally lower. Poor value for money is the reason some visitors give for being dissatisfied with their experience at the MSA and is also the second most common suggestion for improvement. Ensuring that visitors feel their experience is worth the money paid is an important area for the MSA industry to watch.

Professional visitors are the least satisfied visitor group in the survey at 84 per cent. They typically rate the HGV-specific aspects less positively than they rate the other facilities at the MSA. The value for money of the parking package for HGVs is the aspect that has the lowest rating of all. Improvements to these elements could improve the overall experience for professional visitors.

The impression of the building, both inside and out, is something that tends to be rated lower than other aspects. This was reflected in the suggestions for improvement, with maintenance and modernisation of buildings the most often mentioned.

Although most visitors think the range of food available is good, it is the second-lowest scoring factor for food and drink, behind value for money. Visitors' comments indicate potential for improvements to the range of food; suggestions included healthier food options, freshly cooked and locally-sourced foods.

An important road safety function of the MSA is to provide a suitable environment for drivers to rest and relax before continuing to drive. Exploring people's mood on arrival and exit we can see there is a significant uplift in visitors feeling happy or relaxed after their visit. Perhaps more importantly there is a significant decrease in those feeling tired, stressed or frustrated after their visit. This indicates that MSAs are doing a good job in allowing people to resume their journey refreshed and in a better frame of mind to drive safely.

We have shared these survey results with all the MSA operators, Highways England and the Department for Transport. Operators will be able to see detailed results from across their businesses to help them identify where there is good performance that can be emulated or areas where improvements may be required.



# Motorway Services User Survey 2017

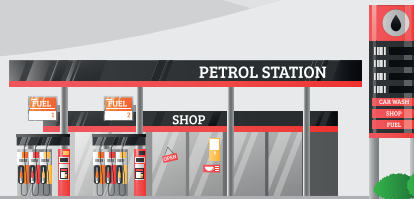
## PLANNING

**112** motorway services rated by over **8700** road users in our survey

**42%** of drivers plan beforehand to stop at a particular motorways services

## ARRIVAL

**87%** think the layout of the car park is good



## USAGE

**92%** rate the approach signs as good

**81%** rate the outside of the building as good

Three quarters of visitors use the toilets

**58%** decide on route which motorway services to stop at

Half sit down to have food or drinks they buy in the motorways services

Almost a third buy food or drinks to have in their vehicle

## OVERALL

**90%** of visitors are satisfied with their experience at the motorways services

**97%** say they would be likely to stop at the same motorways services again

## MOOD

**17%** reduction in visitors who feel tired, stressed or frustrated after their visit



**20%** uplift in visitors who feel happy or relaxed after their visit

## RATINGS

**90%** rate the cleanliness of the toilets as good

**64%** rate the value for money of food or drink they had as good


**94%** rate the friendliness of the staff serving food and drink as good

# Key findings

## Who visits MSAs

Almost two thirds of the MSA visitors we spoke to were travelling for leisure purposes. 18 per cent were travelling on business and seven per cent were commuters. 11 per cent were professional visitors; those who drive for a living, such as HGV and delivery drivers.

### 1 Who visits MSAs (%)



	All visitors	Leisure	Business	Commuter	Professional
Male	62	51	77	71	97
Female	38	49	23	29	3
18 to 34	22	22	21	36	15
35 to 54	40	34	51	43	53
55+	38	44	28	21	32

Base: all MSA visitors (8701), Leisure (5600), Business (1536), Commuter (617), Professional (948)

While the leisure visitors were evenly split between men and women, all other visitor types had a higher proportion of men. 97 per cent of professional visitors were men. The most common age group overall was 35-54; however leisure visitors were more commonly aged over 55. Six per cent of visitors had a disability.

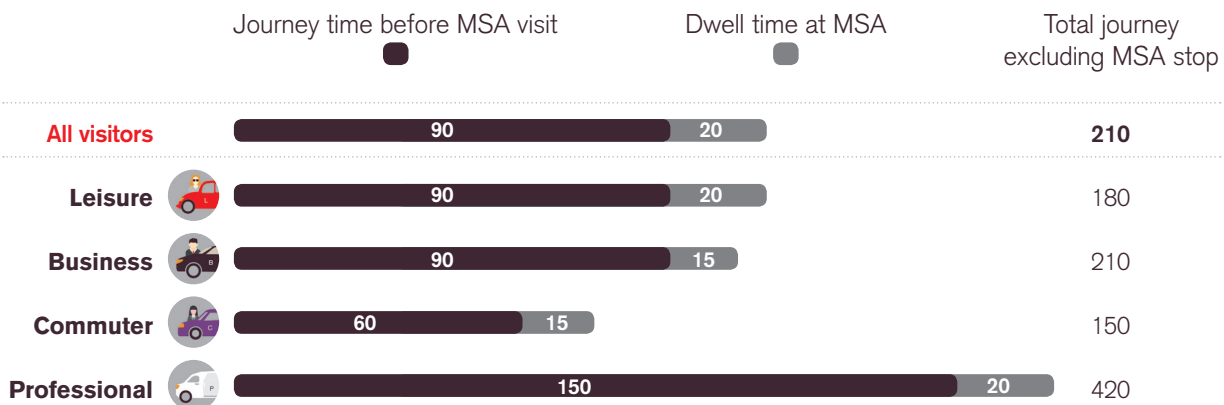
## Journey time and length of break

Visitors were typically on a journey of three and a half hours in total, excluding the time spent at the MSA. Commuters made the shortest journeys at two and a half hours, while professionals made the longest journeys at seven hours. People tended to take a break after being on the road for an hour and a half, stopping for around 20 minutes at the MSA. This was lower for commuters and business visitors who typically stopped for 15 minutes. Professionals spent longer on the road (two and a half hours) before stopping for a break.

*"Needed a rest after riding through 29 miles of road works so this place was right place, right time."*

Business user

### 2 Journey time and length of break (minutes)



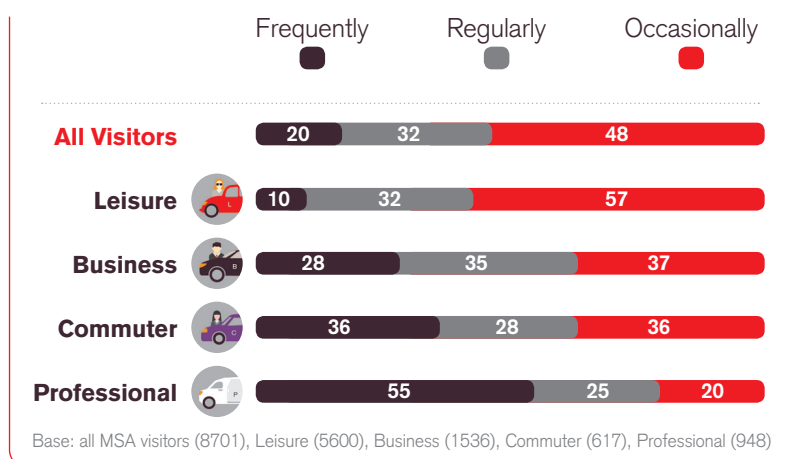
Base: all MSA visitors (8701), Leisure (5600), Business (1536), Commuter (617), Professional (948). Shows median values

## How often people visit MSAs

We asked people how often they visited the particular MSA where we spoke to them. Overall a fifth said they visit frequently (at least once every two weeks), a third visit regularly (every one to three months), and half visit occasionally (less often than every three months or first visit). However, this varied significantly depending on

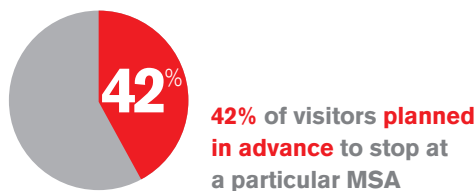
the type of visitor, with those on leisure journeys visiting the least often and professionals visiting the most frequently. Professionals were also much more likely to stop at other MSAs, with three quarters saying they stop frequently at other sites, compared with only 11 per cent of leisure visitors.

### 3 How often people visit this MSA (%)



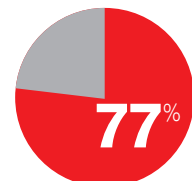
## Reasons for visiting

Around four in ten visitors planned in advance to stop at that particular MSA while the rest decided while they were on the journey. This was notably higher among professionals with six in ten planning in advance to stop at that MSA. For all visitors, using the toilet facilities and getting something to eat and drink were key reasons for deciding to stop. For HGV drivers, a need to take a break from driving was the top reason.

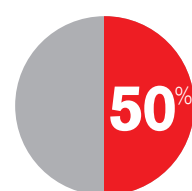


The facilities visitors used at the MSA were largely the same for each of the main visitor types. Around three quarters used the toilets and around half sat down to have food or drink they bought in the MSA, although the latter was lower among professionals. A third of visitors bought food or drink to have in their vehicle. Nine per cent of all visitors bought fuel (or charged their electric vehicle); this was lowest among leisure visitors at seven per cent and highest among professionals at 14 per cent.

*"Only need the loo and that's nice and clean."*  
Leisure user



*"Nice place to come on a long journey. You can get food and drinks, and go to the toilet."*  
Commuter





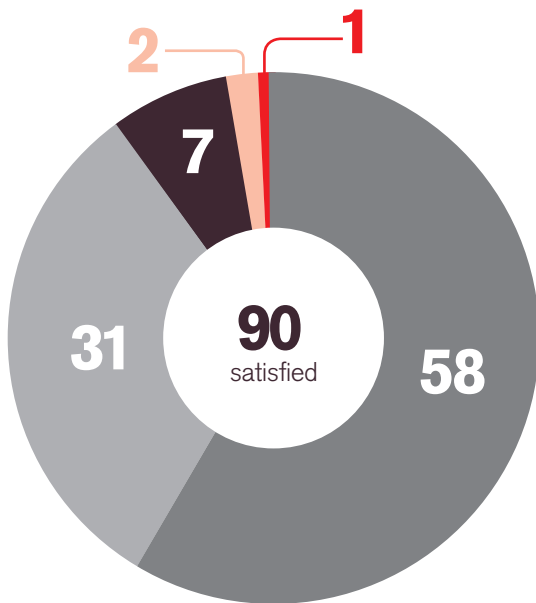
## Overall satisfaction

Overall satisfaction with the experience at MSAs was high at 90 per cent. Indeed 58 per cent of visitors were very satisfied. The highest levels of satisfaction were among those visiting for leisure or business and commuters. Satisfaction was slightly lower for professionals, although still 84 per cent. Only three per cent of all visitors were dissatisfied with their experience. However, there was a

slightly higher level of dissatisfaction among professional visitors at seven per cent.

Visitors with a disability were almost as satisfied with their experience at 88 per cent. Four fifths of those with a disability said the MSA catered well for their disability, but nearly one in ten thought the MSA catered poorly for them.

### 4 Overall satisfaction (%)



Very satisfied  
 Fairly satisfied  
 Neither/nor  
 Fairly dissatisfied  
 Very dissatisfied

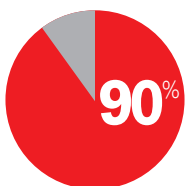
Base: all MSA visitors (8701)

*"Good experience overall."*

Leisure user

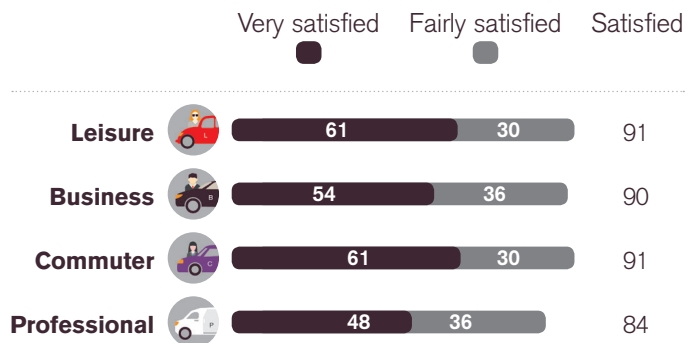
*"Seems to cater quite well for disabled people like me."*

Leisure user



**90% of visitors were satisfied with their experience at the MSA**

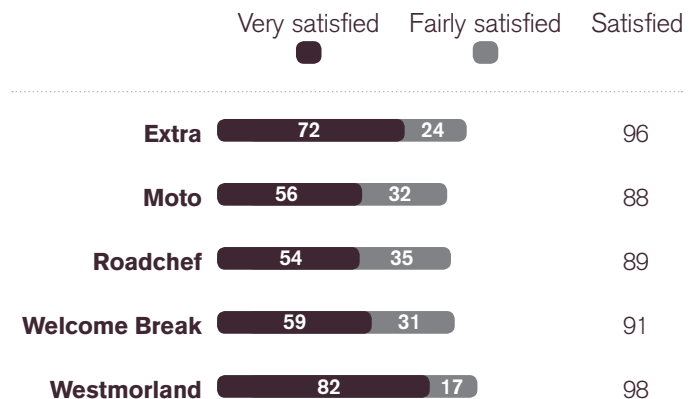
### 5 Overall satisfaction by visitor type (%)



Base: all MSA visitors (8701), Leisure (5600), Business (1536), Commuter (617), Professional (948)

Overall satisfaction was high regardless of which company operated the MSA. The difference between the three largest operators, Moto, Roadchef and Welcome Break, was small, ranging from 88-91 per cent. The other two main operators, Extra and Westmorland, scored higher still at 96 per cent and 98 per cent respectively.

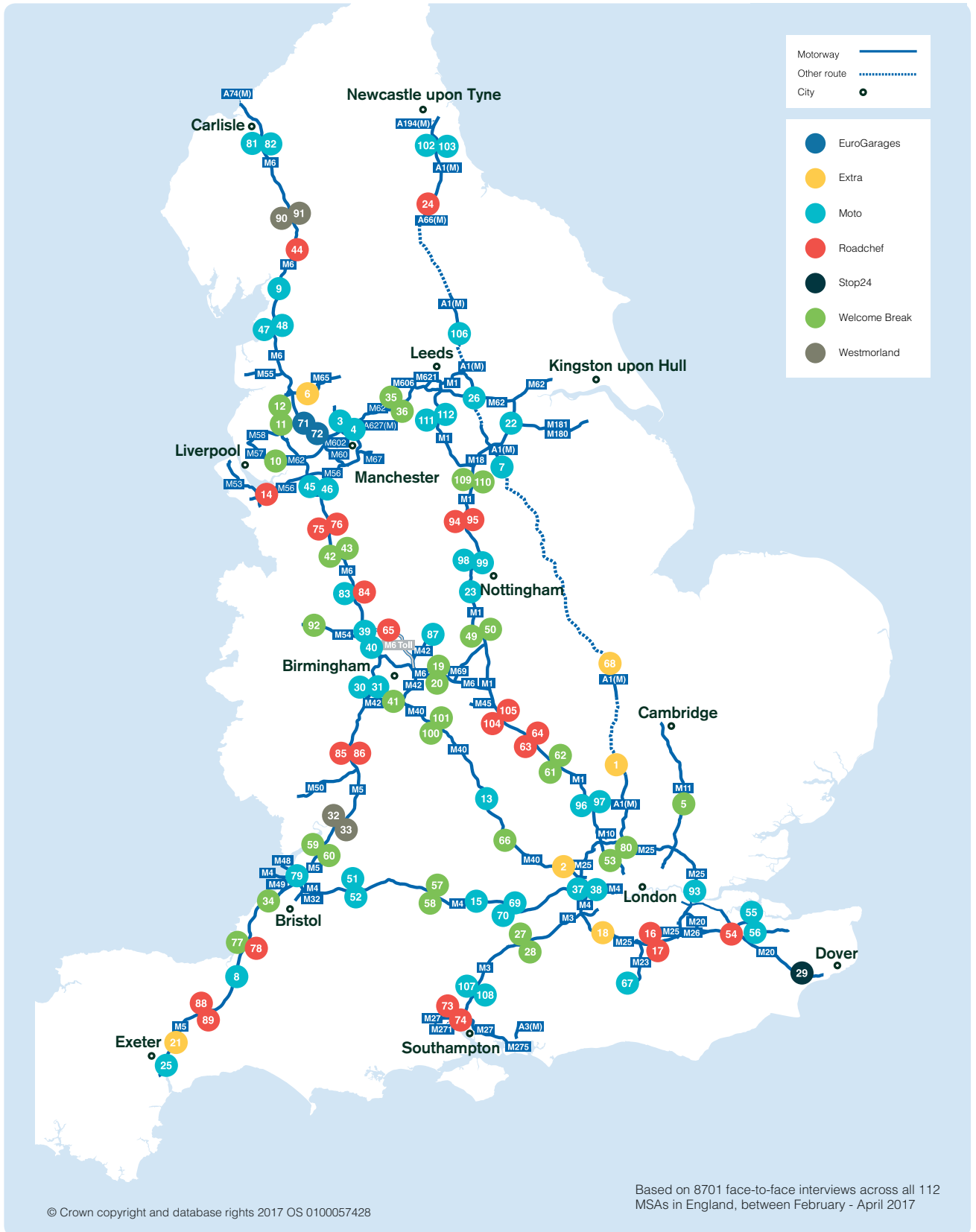
### 6 Overall satisfaction by MSA operator (%)



Base: Extra (453), Moto (3502), Roadchef (1787), Welcome Break (2391), Westmorland (340)

Overall satisfaction at the 112 individual MSAs ranged from 62 per cent to 100 per cent. Three fifths of all service areas had satisfaction ratings of 90 per cent or above. A further three in ten had satisfaction ratings of between 80 and 89 per cent.

Overall satisfaction by motorway service area





Map no	Motorway service area	% satisfied	Map no	Motorway service area	% satisfied
1	Baldock	96	57	Membury Eastbound	77
2	Beaconsfield	97	58	Membury Westbound	88
3	Birch Eastbound	89	59	Michaelwood Northbound	89
4	Birch Westbound	92	60	Michaelwood Southbound	93
5	Birchanger Green	95	61	Newport Pagnell Northbound	95
6	Blackburn with Darwen	96	62	Newport Pagnell Southbound	89
7	Blyth	95	63	Northampton Northbound	91
8	Bridgwater	79	64	Northampton Southbound	94
9	Burton-in-Kendal	91	65	Norton Canes	99
10	Burtonwood	89	66	Oxford	87
11	Charnock Richard Northbound	91	67	Pease Pottage	93
12	Charnock Richard Southbound	89	68	Peterborough	94
13	Cherwell Valley	96	69	Reading Eastbound	96
14	Chester	96	70	Reading Westbound	100
15	Chieveley	86	71	Rivington Northbound	100
16	Clacket Lane Eastbound	79	72	Rivington Southbound	95
17	Clacket Lane Westbound	92	73	Rownhams Northbound	76
18	Cobham	97	74	Rownhams Southbound	75
19	Corley Northbound	99	75	Sandbach Northbound	89
20	Corley Southbound	93	76	Sandbach Southbound	84
21	Cullompton	97	77	Sedgemoor Northbound	86
22	Doncaster North	94	78	Sedgemoor Southbound	93
23	Donington Park	95	79	Severn View	83
24	Durham	96	80	South Mimms	96
25	Exeter	84	81	Southwaite Northbound	93
26	Ferrybridge	90	82	Southwaite Southbound	84
27	Fleet Northbound	91	83	Stafford Northbound	90
28	Fleet Southbound	90	84	Stafford Southbound	70
29	Folkestone	86	85	Strensham Northbound	89
30	Frankley Northbound	94	86	Strensham Southbound	93
31	Frankley Southbound	95	87	Tamworth	95
32	Gloucester Northbound	99	88	Taunton Deane Northbound	93
33	Gloucester Southbound	99	89	Taunton Deane Southbound	96
34	Gordano	84	90	Tebay Northbound	98
35	Hartshead Moor Eastbound	91	91	Tebay Southbound	98
36	Hartshead Moor Westbound	94	92	Telford	96
37	Heston Eastbound	62	93	Thurrock	81
38	Heston Westbound	90	94	Tibshelf Northbound	94
39	Hilton Park Northbound	96	95	Tibshelf Southbound	97
40	Hilton Park Southbound	96	96	Toddington Northbound	86
41	Hopwood Park	95	97	Toddington Southbound	76
42	Keele Northbound	87	98	Trowell Northbound	91
43	Keele Southbound	82	99	Trowell Southbound	87
44	Killington Lake	90	100	Warwick Northbound	90
45	Knutsford Northbound	85	101	Warwick Southbound	87
46	Knutsford Southbound	99	102	Washington Northbound	76
47	Lancaster Northbound	82	103	Washington Southbound	89
48	Lancaster Southbound	90	104	Watford Gap Northbound	93
49	Leicester Forest East Northbound	93	105	Watford Gap Southbound	83
50	Leicester Forest East Southbound	95	106	Wetherby	84
51	Leigh Delamere Eastbound	85	107	Winchester Northbound	84
52	Leigh Delamere Westbound	86	108	Winchester Southbound	76
53	London Gateway	91	109	Woodall Northbound	92
54	Maidstone	91	110	Woodall Southbound	96
55	Medway Eastbound	87	111	Woolley Edge Northbound	80
56	Medway Westbound	84	112	Woolley Edge Southbound	93

We asked visitors to tell us the main reason that they were satisfied with their overall experience at the MSA. The top three reasons mentioned by all visitors were the MSA being clean and tidy, that it was reliable in delivering what they wanted, and that there was a good variety of food options. Ease of parking or free parking was mentioned by one in six HGV drivers.

Among the small minority (three per cent) of visitors who were dissatisfied with their experience, poor value for money, the number and cleanliness of toilets and showers, and a poor variety of food choices were the most common reasons.

*"It's clean, tidy and just offers what is needed."*

Leisure user

*"Good variety of food outlets."*

Professional user

*"It was where I needed it to be and had the facilities I needed."*

Business user

## Arrival

We asked visitors to rate the various aspects they saw or used as they arrived at the MSA. Approach signs, the slip road, car park layout, feeling of safety leaving the vehicle and the walk to the building were rated highly; all within a few percentage points of 90 per cent. However, professional visitors gave lower ratings for aspects related to parking than other visitors. The impression of the building outside and inside was rated slightly lower at 81 per cent and 85 per cent respectively. The quality of the Wi-Fi was also rated lower at 75 per cent.

Although ratings were generally high there were some variations across operators, with differences of 10 percentage points or more on some aspects. The variations are greatest for the impression of the building outside (ranging from 75 per cent to 98 per cent) and the impression of the building inside (ranging from 80 per cent to 99 per cent).

## 7 How visitors rated the MSA upon arrival (%)



### Approach signs

60 very good  
31 fairly good

**92 good**



### Slip road

59 very good  
30 fairly good

**89 good**



### Car park layout

55 very good  
31 fairly good

**87 good**



### Feeling of safety leaving vehicle

61 very good  
32 fairly good

**93 good**



### Walk from vehicle to building

64 very good  
30 fairly good

**94 good**



### Wi-Fi\*

42 very good  
33 fairly good

**75 good**



### Impression of building outside

45 very good  
36 fairly good

**81 good**



### Impression of building inside

47 very good  
38 fairly good

**85 good**

Base: all MSA visitors (8701). \*Base for Wi-Fi (1775)

## Facilities in the MSA

We also explored visitors' views about the facilities they used while they were at the MSA. For example, using the toilets, buying food or drink to eat in the MSA or in their vehicle, doing grocery or convenience shopping or refuelling their vehicles.

Toilets were rated positively for the number available (92 per cent) and the cleanliness (90 per cent). However, the quality of the fixtures in the toilets was rated lower at 82 per cent.

When it came to buying food or drink to have in the MSA most aspects – amount of seating, friendliness of staff, speed of service, quality of food and drink and cleanliness of the tables – were rated as good by over 90 per cent of customers. The range of food and drink was rated slightly lower at 88 per cent. Value for money was rated considerably lower, with 64 per cent rating it as good and 16 per cent rating it as poor.

A similar pattern was seen in the ratings for buying food and drink to have in their vehicle. 95 per cent rated both the speed of service and friendliness of staff as good, range of food and drink was slightly lower at 88 per cent and value for money again rated lowest at 66 per cent.

The friendliness of the staff and the speed of service were rated very positively (between 93 per cent and 97 per cent) across all the various activities that visitors undertook.

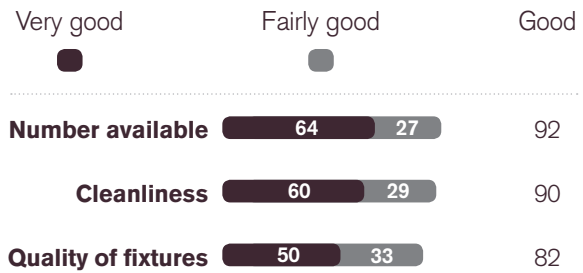
Value for money tended to be rated lower across all the aspects, ranging from 64 per cent for food and drink bought to consume in the MSA to 77 per cent for grocery shopping.

*"Clean and I like the brands you have."*

Leisure user

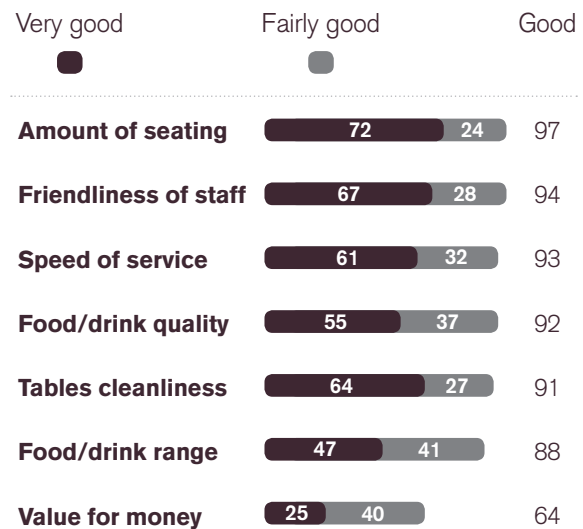


### 8 How visitors rated the toilets (%)



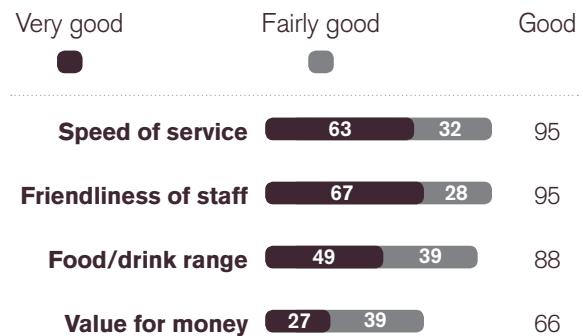
Base: all MSA visitors using the toilets (6671). Used by 77% of visitors

### 9 How visitors rated the food or drink they bought to have in the MSA (%)



Base: all MSA visitors buying food and drink to eat in the MSA (4282). Done by 50% of visitors

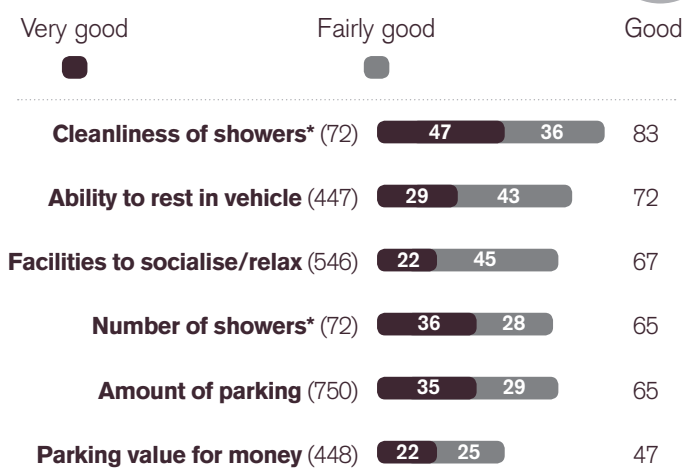
### 10 How visitors rated the food or drink they bought to have in their vehicle (%)



Base: all visitors buying food and drink to have in the vehicle (2514). Done by 30% of visitors

We asked HGV drivers to rate the facilities primarily provided for them, such as the showers, the parking and the ability to rest or socialise with other drivers. They tended to rate the main aspects of the MSA (toilets, buying something to eat or drink) similarly to other visitor groups. However they typically rate these HGV-specific aspects lower. Cleanliness of the showers was rated the highest with 83 per cent describing this as good, while the value for money of the parking package was rated the lowest with 47 per cent saying this was good. These HGV-specific facilities are closely linked to these visitors' overall satisfaction.

### 11 How visitors rated the HGV facilities (%)



Base sizes are shown in brackets for each aspects rated. \*Low base size

*"Better facilities for HGV drivers as we do long hours and deserve good quality facilities at a reasonable price."*

Professional user

### The impact an MSA visit has on mood

We showed visitors a range of images depicting a wide range of recognisable emotions. We asked them to select the image which best represented their mood when they arrived at the MSA (at the start of the survey) and their mood as they were leaving the MSA (at the end of the survey).

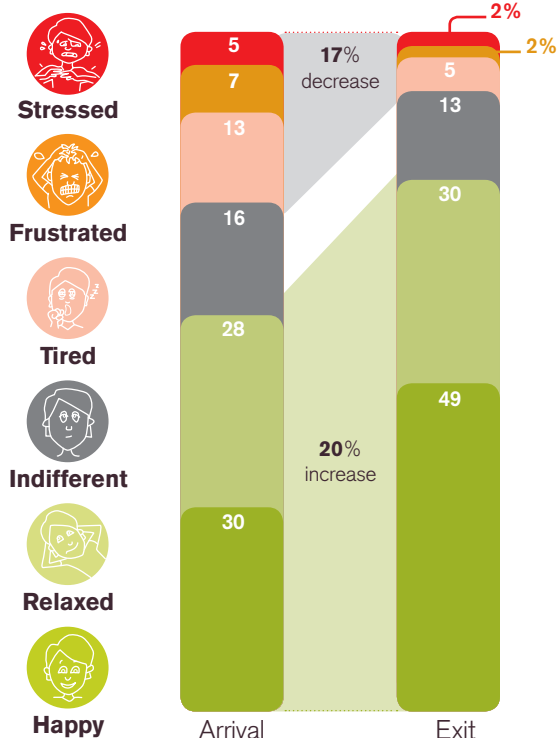
The results show that stopping at an MSA has a significant effect on mood. The proportion of visitors who felt happy and relaxed increased from 58 per cent upon arrival to 78 per cent after the visit, a 20 percentage point

uplift in positive emotion. There was also a significant decrease in those who felt tired, frustrated or stressed, down from 26 per cent upon arrival to nine per cent after the visit, a 17 percentage point decrease in negative emotion.

Visitors who spent longer on the road before taking a break were more likely to feel a negative emotion as they arrived at the MSA. Among those who had been travelling for three hours or more, 36 per cent said they felt tired, frustrated or stressed on arrival, compared to 22 per cent of those who stopped within an hour. The level of negative emotion felt when leaving the MSA was much reduced to around 10 per cent, irrespective of the time they had spent on the road before stopping.

The shift towards positive emotion indicates that the break at the MSA is a good experience for most. These are significant findings given the potentially beneficial impact on driving standards.

### 12 Mood on arrival and exit (%)



Visitors were shown the icons (but not the word describing it) and asked to choose the one which best relates to their mood on arrival and exit

Base: all MSA visitors: (8701)



### 13 Mood on arrival and exit by journey time before stopping at the MSA (%)

#### Negative mood



Stressed



Frustrated



Tired

#### Positive mood



Relaxed



Happy

	Arrival	Exit	Change	Arrival	Exit	Change
<b>Up to 1 hour before stopping</b>	22	8	15	63	80	17
<b>Over 1 hour up to 3 hours before stopping</b>	26	9	17	56	79	23
<b>Over 3 hours before stopping</b>	36	12	24	52	74	22

Base: all MSA visitors: <=60minutes (3248), >60 minutes <=180 minutes (4557), >180 minutes (896)

"A sanctuary from the traffic jam on the M!"

Leisure user

"We just needed to have a rest and a drink. It's relaxed and perfect for what we need."

Leisure user

"I was sick of driving. Needed half hour to eat, relax and make a few phone calls."

Business user

## Improving the MSA experience

With overall satisfaction among visitors across all 112 MSAs standing at 90 per cent, a key message to the operators must be 'well done, keep doing it'. Almost half of visitors said there was no particular improvement they would like to see at the MSA where we spoke to them.

Among those who did have a suggestion, the main themes were improved building maintenance and modernisation, and better value for money. A wider variety of food outlets, improvements to the toilets and better parking facilities were also leading suggestions. HGV drivers were more likely than other visitors to suggest bigger and cheaper parking facilities, and improvements to showers.

We used statistical analysis to determine the influence that different aspects of the MSA experience have on visitors' overall satisfaction. This reinforces that aspects relating to the food and drink bought to eat in the MSA, particularly quality, range and value for money, are key factors in creating a satisfactory experience. The impression of the building, both inside and outside, and the cleanliness of the toilets are also important influencers of satisfaction.

For HGV drivers, while these factors are still important, value for money of the parking package has the greatest influence on their overall satisfaction but is rated lower than other aspects.

"I cannot buy a hot meal other than burgers. I am on the road all the week and I do not want to be eating fast food every day and that is all that is offered these days."

Professional user

"The whole place needs renovating and a good maintenance programme in place once done."

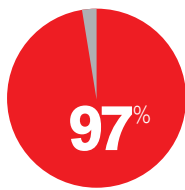
Leisure user

"More HGV parking and less expensive."

Professional user

## Visiting the MSA in future

Almost all visitors (97 per cent) said that they would be likely to stop at the same MSA again in future, if they were making a similar journey. This splits into 69 per cent who said they 'definitely' would and 27 per cent who said they 'probably' would. The overall likelihood to revisit was similar across all operators, although the proportion who said they definitely would stop again varied. There was a small variation across the larger operators, ranging from 64 per cent to 69 per cent, while the smaller operators had 82 per cent and 83 per cent.



97% of visitors said they would be likely to stop at the same MSA in future

*"We have had excellent service from the staff at Costa. We will be back again on the way back, breaks up the journey."*

Leisure user



## How we did it

**We interviewed 8700 visitors as they left MSAs, to capture in-the-moment feedback about their experience. Trained interviewers asked about their experience using a short questionnaire. We did this at all 112 official MSAs in England.**

At each MSA there were four six-hour interview shifts, two on weekdays and two at the weekend, spread across different times of the day to cover a wide range of visitors. We set minimum quotas by journey purpose to ensure we could produce results for the various types of visitors (leisure, commuter, business and professional).

Responses from each MSA counted equally towards the overall results. Where we had enough responses, we have shown results individually for the five larger MSA operators (Extra, Moto, Roadchef, Welcome Break and Westmorland). When we quote an 'all-MSA average' this also includes the two other operators' results (Euro Garages and Stop24).

Transport Focus was supported by Populus (an independent accredited research and strategy consultancy) in conducting this research. We carried out fieldwork in February, March and April 2017.

## Background

The Department for Transport (DfT) sets the policy for the spacing of MSAs and the facilities they need to provide. Highways England is the government-owned company that operates, maintains and improves England's motorways and major 'A' roads. It supports the planning process for MSAs, provides the road signs for them and supports DfT in managing the policy.

MSAs must be open 24 hours a day, 365 days a year. They must offer fuel, two hours free parking, toilets and washing facilities, hot food and drinks.

There are 112 MSAs in England operated by seven different

companies (see map on page 8-9 for details). 78 of the sites are in pairs on either side of the motorway, although not always with public access between the two.

MSA operator	Number of sites
Extra	6
Eurogarages	2
Moto	45
Roadchef	23
Stop24	1
Welcome Break	31
Westmorland	4



## Contact Transport Focus

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Transport Focus is the operating  
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