



Motorway Services User Survey spring 2017 results report

Contents

- Background and approach
- Usage patterns
- Overall experience
- Reasons for visiting
- Motorway service area usage
- Improvements
- Overall summary
- Appendix

Background and approach



Project background

Transport Focus represents users of England's motorways and major A-roads, known as the Strategic Road Network (SRN).

As part of that remit, Transport Focus wanted to measure how well Motorway Service Areas (MSA) are meeting the needs of different SRN user groups.

Specific objectives included to:

- ✓ Consistently and robustly measure user satisfaction across all MSAs
- ✓ Identify the key drivers of satisfaction and intention to revisit
- ✓ Understand the effect visiting an MSA has on visitor temperament.



Project approach

- Interviews across all 112 MSAs in England, achieving 8701 responses
- Tablet devices used to interview visitors upon exit, to achieve in-the-moment recollections of their experience
- Fieldwork was conducted between 13 February and 9 April 2017
- Four six-hour interview shifts were completed at each individual MSA, split equally across weekdays and weekends
- Minimum quotas set by journey purpose (leisure, business, etc.) to ensure robust numbers across visitor types
- Individual MSA equally weighted within the data, meaning each site counts equally towards overall results.

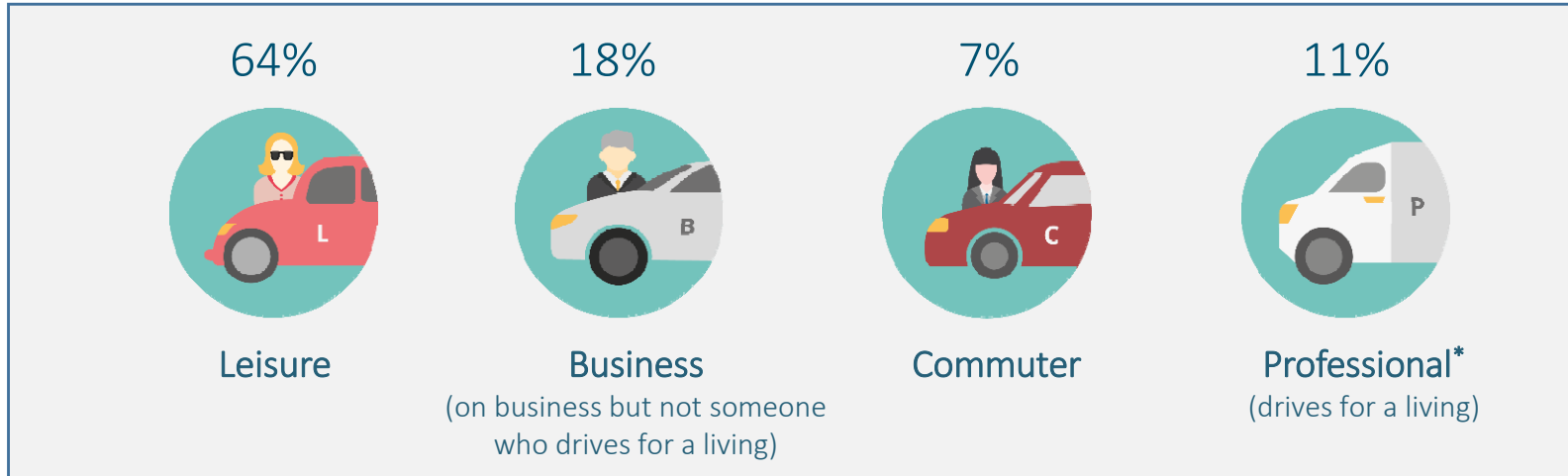
SECTION 1

Usage patterns

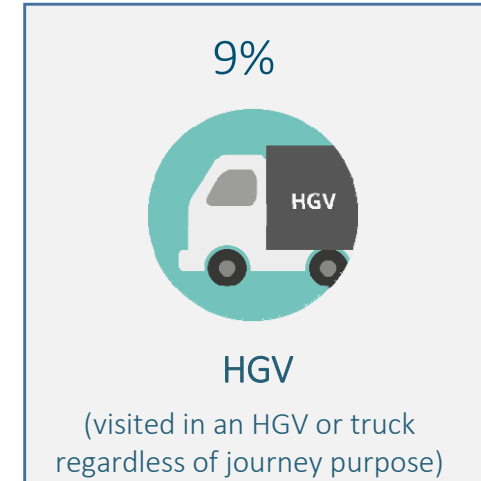
Respondent profile

Almost two thirds of MSA visitors we spoke to were travelling for leisure purposes. Visitors were more typically male, over 35 and travelling by car, rather than another type of vehicle.

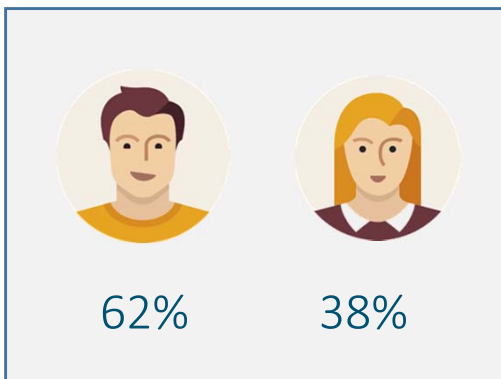
Visitor type



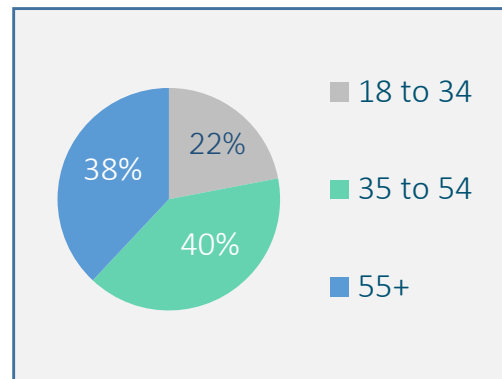
HGV/truck drivers



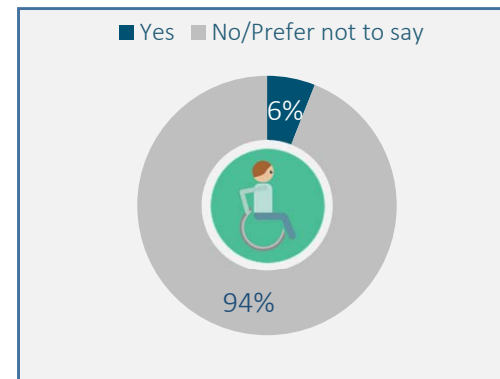
Gender



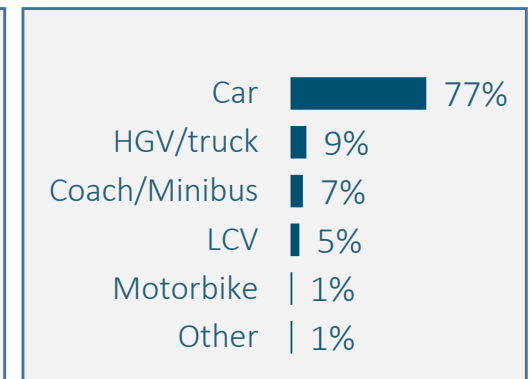
Age***



Disability**







Vehicle type



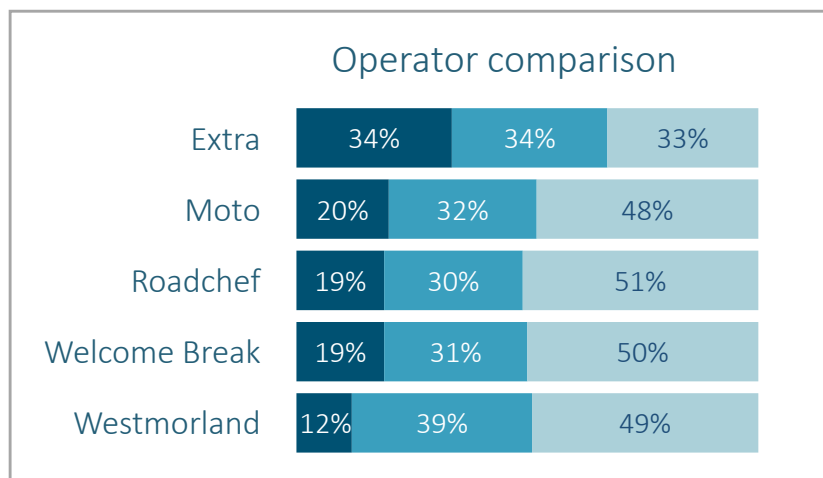
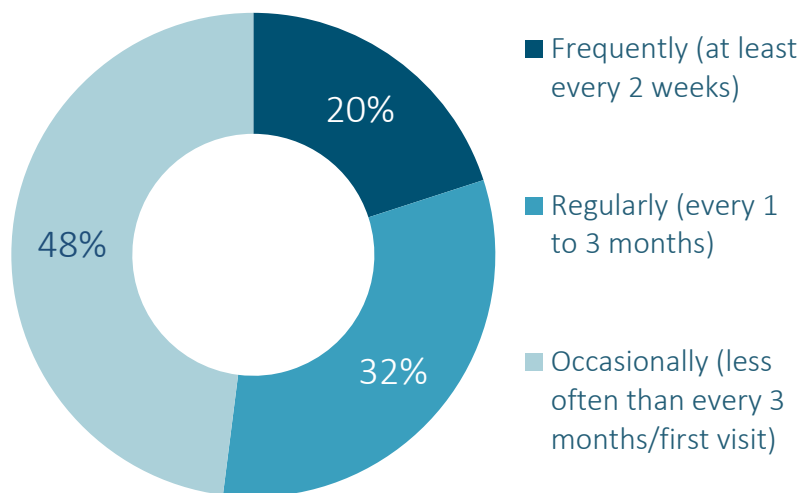
Respondent profile by visitor type

Leisure visitors had an even gender split while all other visitor types had a higher proportion of males. Leisure visitors were more often aged over 55, but for all other visitor types 35 to 54 was the most common age group

Visitor type					
	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%
Disability*	6%	8%	2%	4%	7%

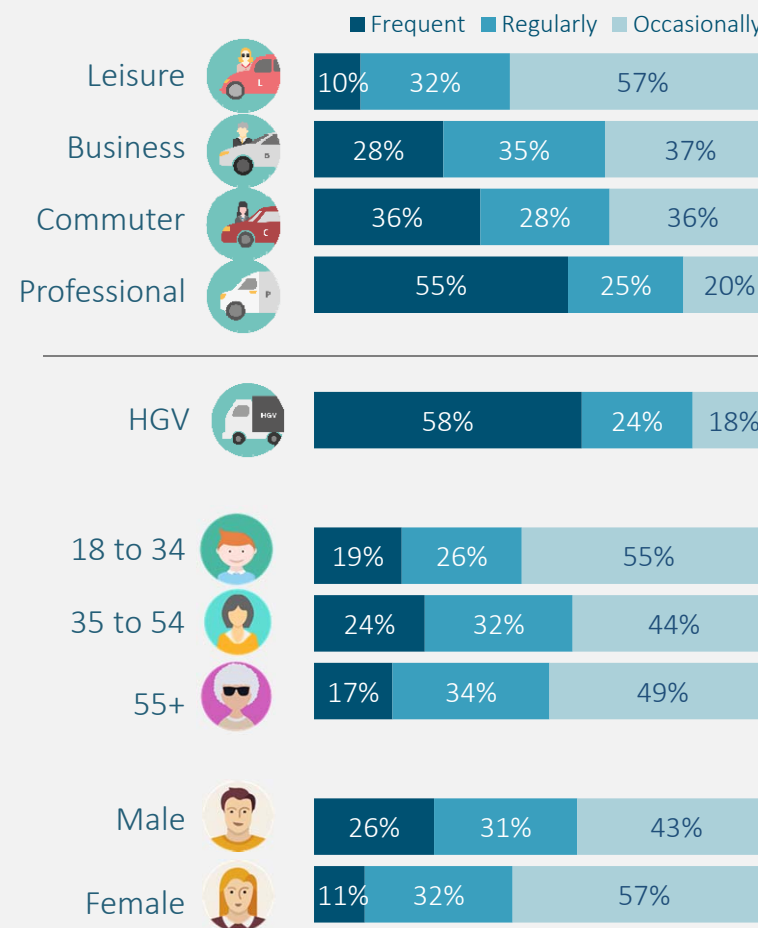
Frequency of visiting this MSA

Half were occasional visitors to the specific MSA at which we spoke to them. However this differed considerably by visitor type – non-leisure visitors, especially professional, tended to visit it much more frequently



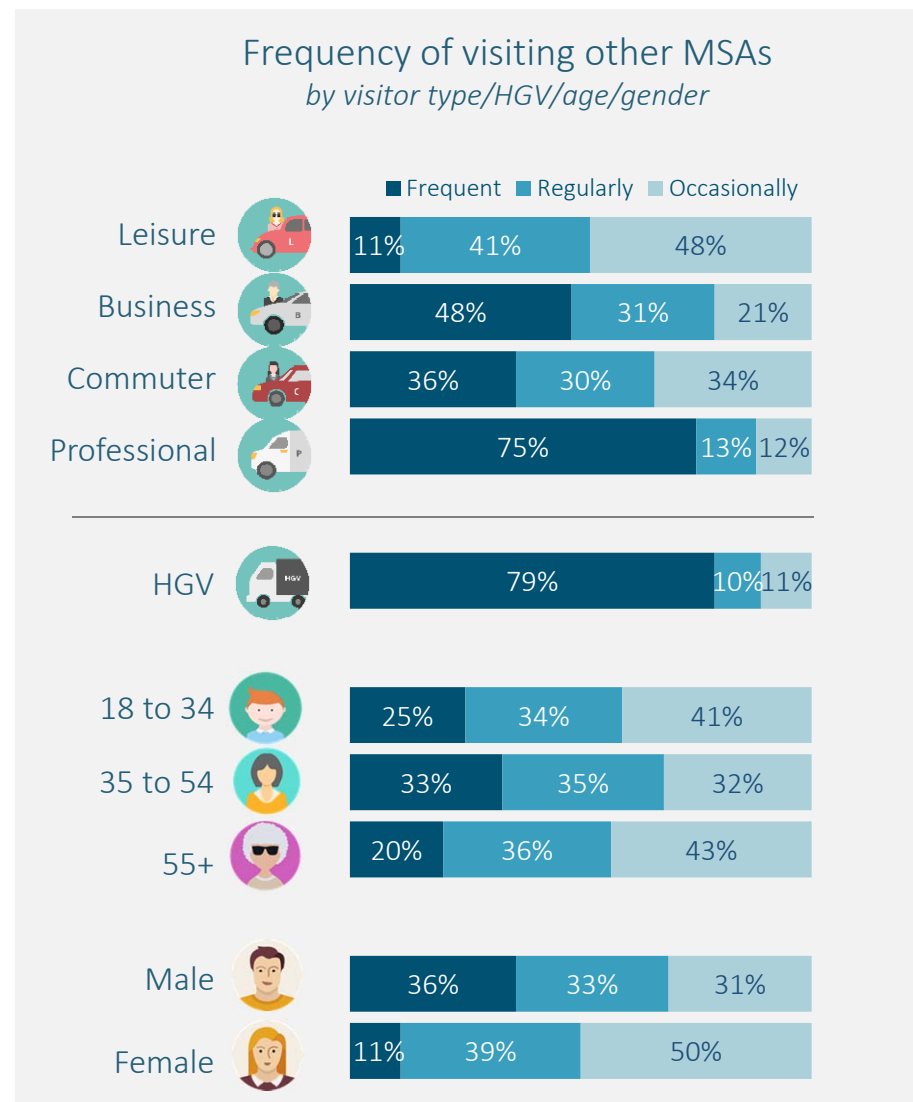
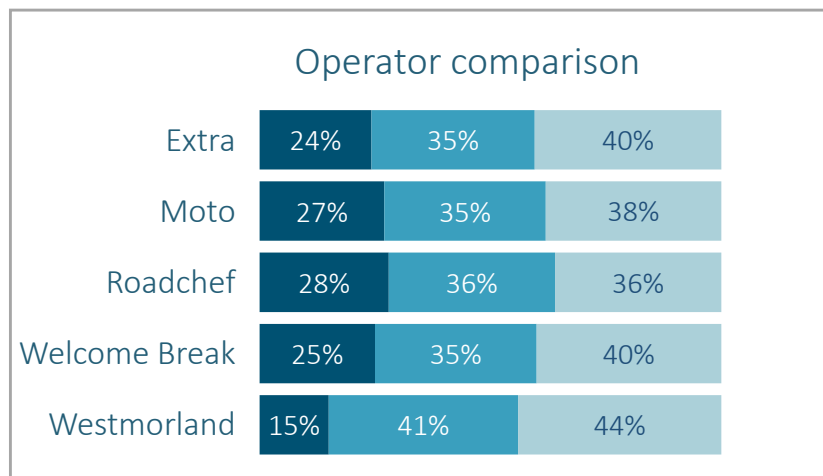
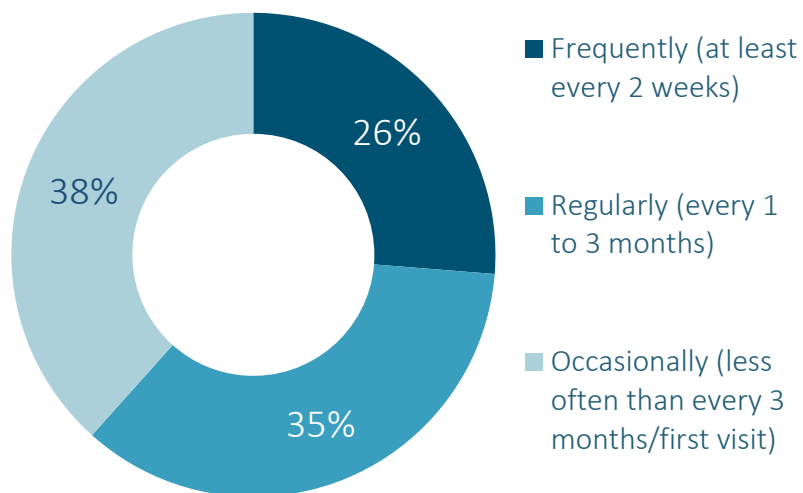
The high level of frequent visitors for Extra is being driven strongly by Baldock Services (57% frequent) and Blackburn Services (49%)

Frequency of visiting this MSA by visitor type/HGV/age/gender



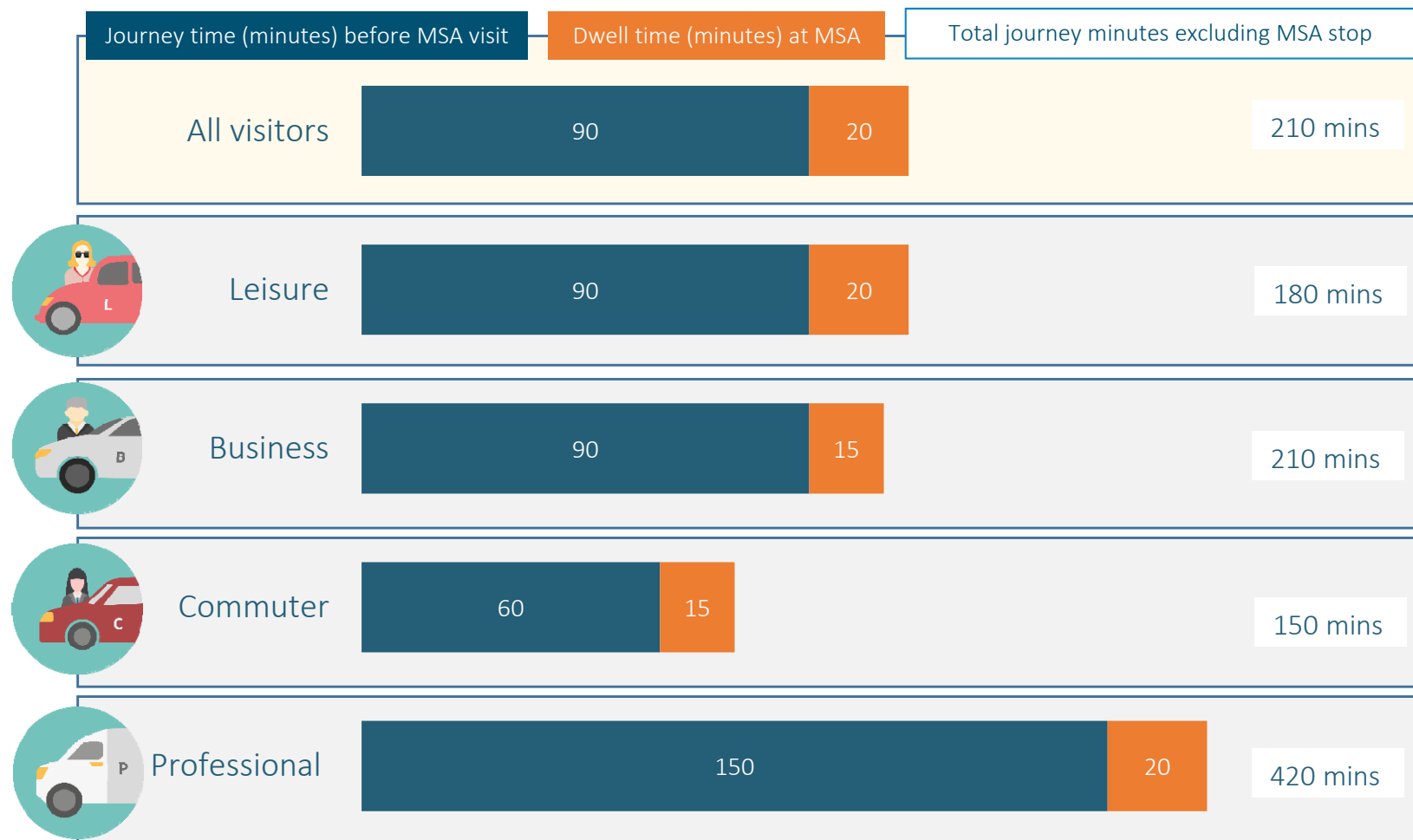
Frequency of visiting other MSAs

Business and professional visitors stop far more frequently at other MSAs, aside from the one where we spoke to them.



Typical* journey length and dwell time

Typically, visitors stopped at an MSA after 90 minutes on the road and they typically stop for 20 minutes. Commuters had the shortest dwell times. Professionals typically spent the longest on the road before stopping.



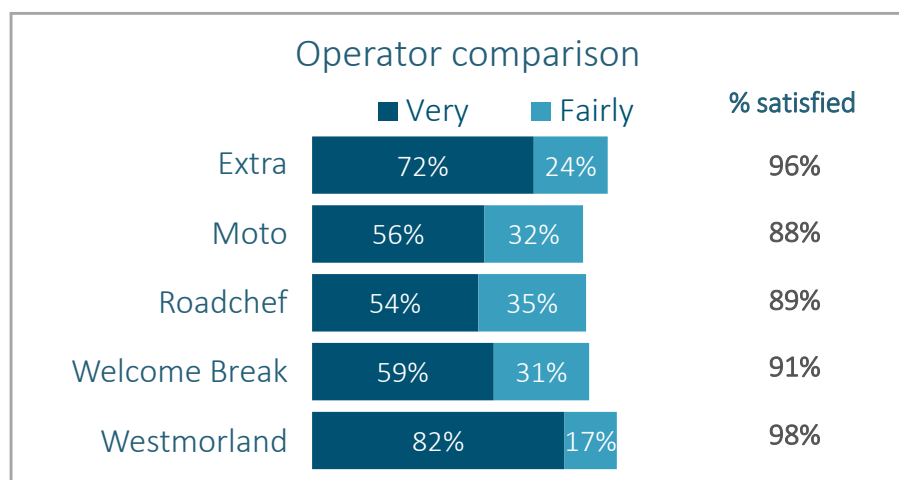
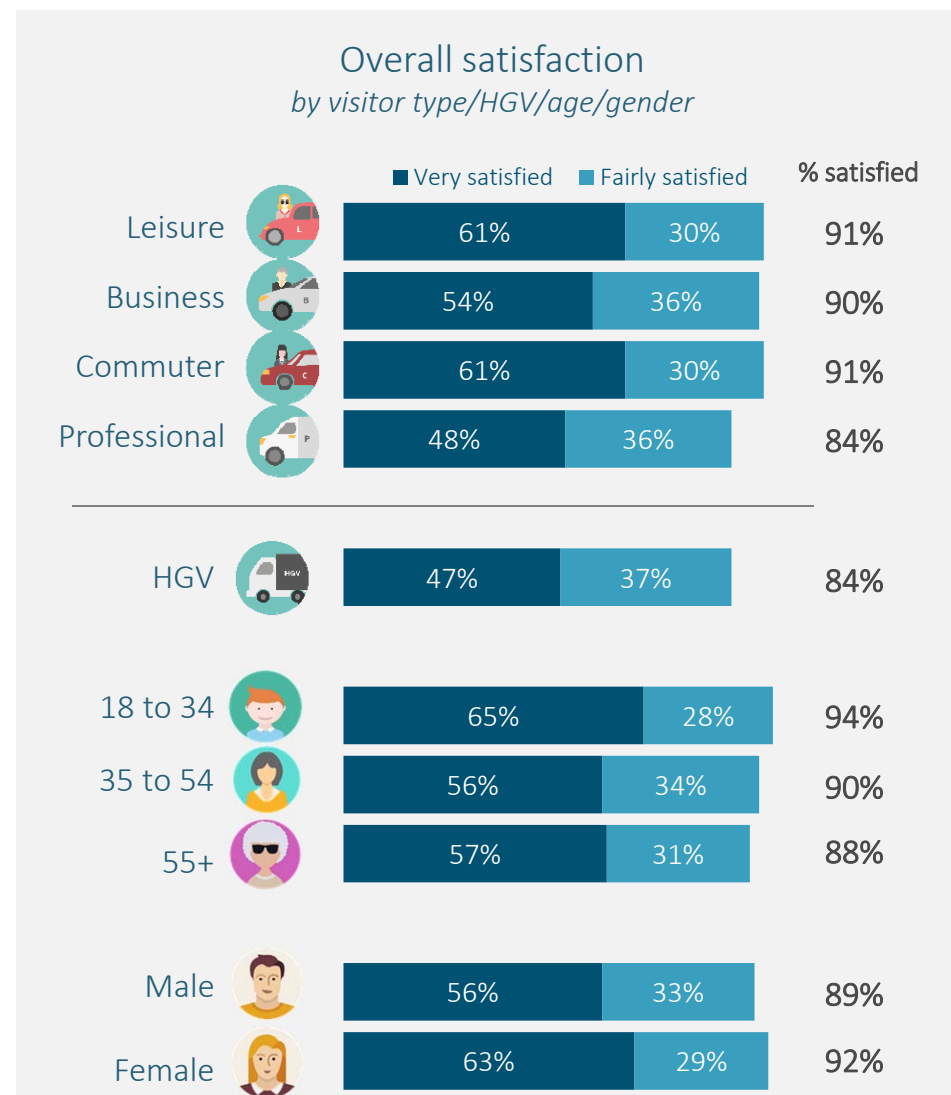
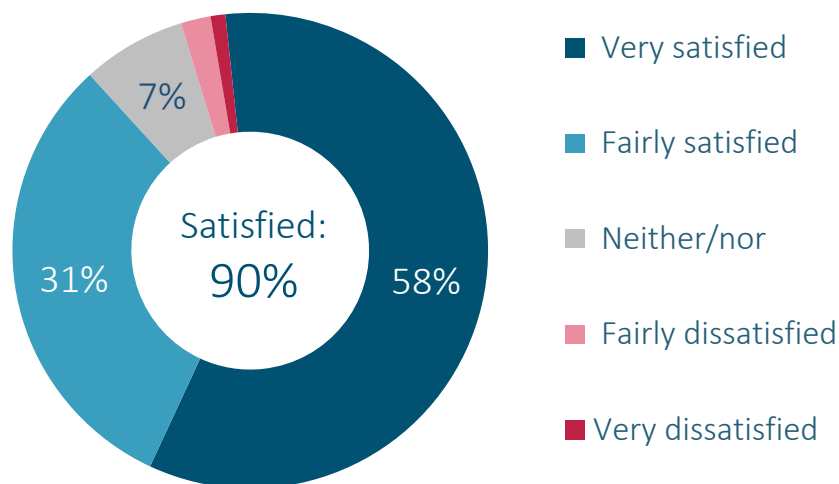
* Typical in this instance shows median values

SECTION 2

Overall experience

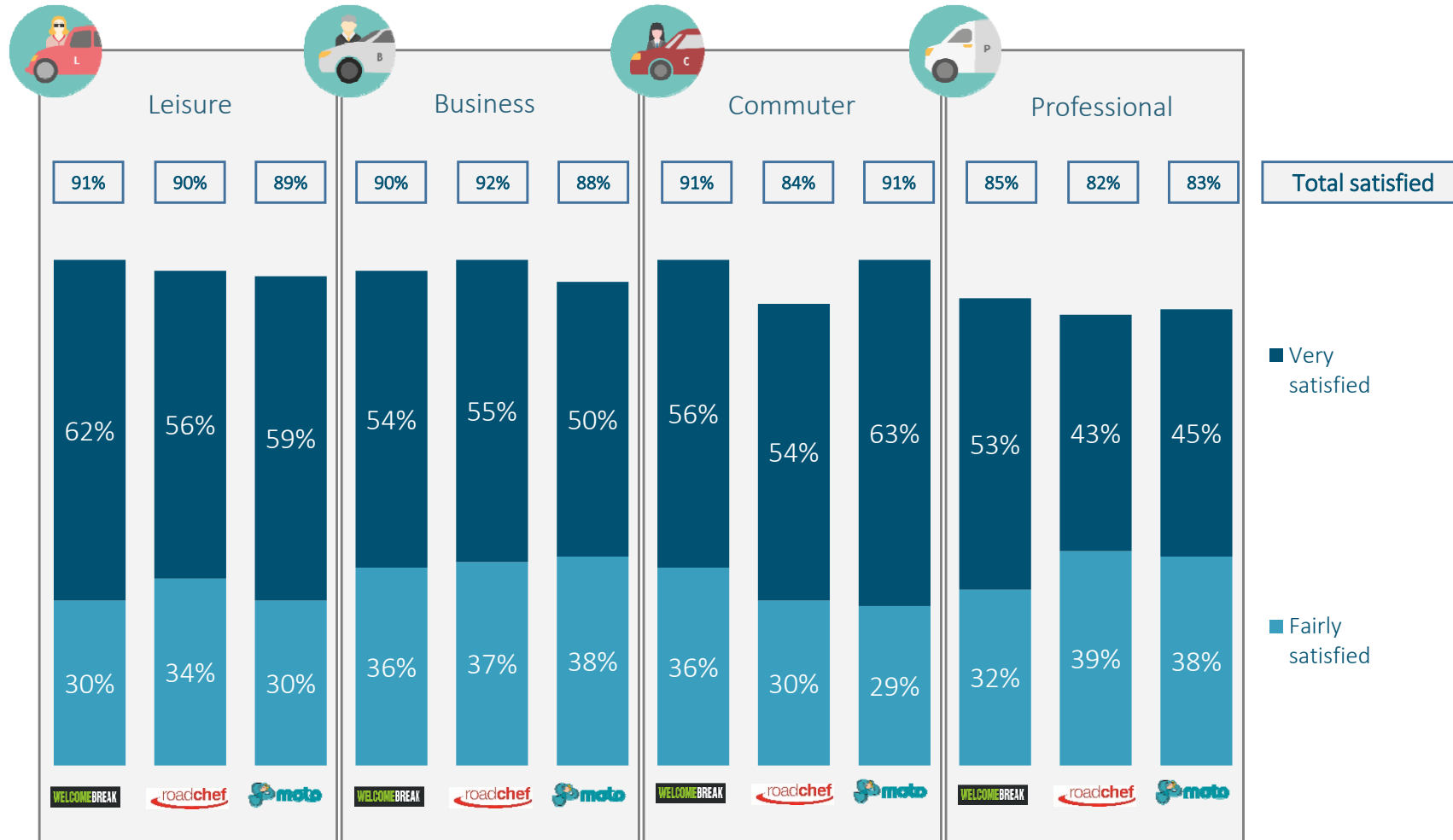
Overall satisfaction

Overall satisfaction was high among all visitor types, though slightly lower for professional visitors. Notably the levels of very satisfied made up a good majority of the satisfaction among most visitor groups.



Satisfaction (by visitor type and MSA operator)

Levels of satisfaction by visitor type are largely consistent across the three largest operators



N.B. base sizes for the other MSA operators are too small to split by visitor type

Q8 Overall, how satisfied are you with your experience at these Motorway Services today? Base:
 Leisure – Welcome Break (1585), Roadchef (1134), Moto (2208),
 Business – Welcome Break (429), Roadchef (335), Moto (626),
 Commuter - Welcome Break (149), Roadchef (124), Moto (236),
 Professional - Welcome Break (228), Roadchef (194), Moto (432),

Overall satisfaction by individual MSA [1]*

Motorway service area	Operator	Road	% satisfied
Baldock	Extra	A1 (M)	96
Beaconsfield	Extra	M40	97
Birch EB	Moto	M62	89
Birch WB	Moto	M62	92
Birchanger Green	Welcome Break	M11	95
Blackburn with Darwen	Extra	M65	96
Blyth	Moto	A1 (M)	95
Bridgwater	Moto	M5	79
Burton-in-Kendal	Moto	M6	91
Burtonwood	Welcome Break	M62	89
Charnock Richard NB	Welcome Break	M6	91
Charnock Richard SB	Welcome Break	M6	89
Cherwell Valley	Moto	M40	96
Chester	Roadchef	M56	96
Chieveley	Moto	M4	86
Clacket Lane EB	Roadchef	M25	79
Clacket Lane WB	Roadchef	M25	92
Cobham	Extra	M25	97
Corley NB	Welcome Break	M6	99
Corley SB	Welcome Break	M6	93
Cullompton	Extra	M5	97
Doncaster North	Moto	M18	94
Donington Park	Moto	M1	95
Durham	Roadchef	A1 (M)	96
Exeter	Moto	M5	84
Ferrybridge	Moto	M62	90
Fleet NB	Welcome Break	M3	91
Fleet SB**	Welcome Break	M3	90

Motorway service area	Operator	Road	% satisfied
Folkestone	Stop24	M20	86
Frankley NB	Moto	M5	94
Frankley SB	Moto	M5	95
Gloucester NB	Westmorland	M5	99
Gloucester SB	Westmorland	M5	99
Gordano	Welcome Break	M5	84
Hartshead Moor EB	Welcome Break	M62	91
Hartshead Moor WB	Welcome Break	M62	94
Heston EB	Moto	M4	62
Heston WB	Moto	M4	90
Hilton Park NB	Moto	M6	96
Hilton Park SB	Moto	M6	96
Hopwood Park	Welcome Break	M42	95
Keele NB	Welcome Break	M6	87
Keele SB	Welcome Break	M6	82
Killington Lake	Roadchef	M6	90
Knutsford NB	Moto	M6	85
Knutsford SB	Moto	M6	99
Lancaster NB	Moto	M6	82
Lancaster SB	Moto	M6	90
Leicester Forest East NB	Welcome Break	M1	93
Leicester Forest East SB	Welcome Break	M1	95
Leigh Delamere EB	Moto	M4	85
Leigh Delamere WB	Moto	M4	86
London Gateway	Welcome Break	M1	91
Maidstone	Roadchef	M20	91
Medway EB	Moto	M2	87
Medway WB	Moto	M2	84

Q8 Overall, how satisfied are you with your experience at these Motorway Services today?

** Fleet westbound has a much lower sample size.

* Please note: a) The sample sizes at each MSA are around 80; and b) to obtain the most inclusive view of visitor experience, interviews were conducted across locations within MSAs such as main building, the forecourt, HGV areas; and that for each MSA the proportion of interviews achieved at each of these locations varies site to site. These two points should be borne in mind when interpreting individual scores or differences between individual MSAs. Interview numbers for each MSA are in the appendix.

Overall satisfaction by individual MSA [2]

Motorway service area	Operator	Road	% satisfied
Membury EB	Welcome Break	M4	77
Membury WB	Welcome Break	M4	88
Michaelwood NB	Welcome Break	M5	89
Michaelwood SB	Welcome Break	M5	93
Newport Pagnell NB	Welcome Break	M1	95
Newport Pagnell SB	Welcome Break	M1	89
Northampton NB	Roadchef	M1	91
Northampton SB	Roadchef	M1	94
Norton Canes	Roadchef	M6 TOLL	99
Oxford	Welcome Break	M40	87
Pease Pottage	Moto	M23	93
Peterborough	Extra	A1 (M)	94
Reading EB	Moto	M4	96
Reading WB	Moto	M4	100
Rivington NB	EuroGarages	M61	100
Rivington SB	EuroGarages	M61	95
Rownhams NB	Roadchef	M27	76
Rownhams SB	Roadchef	M27	75
Sandbach NB	Roadchef	M6	89
Sandbach SB	Roadchef	M6	84
Sedgemoor NB	Welcome Break	M5	86
Sedgemoor SB	Roadchef	M5	93
Severn View	Moto	M48	83
South Mimms	Welcome Break	M25	96
Southwaite NB	Moto	M6	93
Southwaite SB	Moto	M6	84
Stafford NB	Moto	M6	90
Stafford SB	Roadchef	M6	70

Motorway service area	Operator	Road	% satisfied
Strensham NB	Roadchef	M5	89
Strensham SB	Roadchef	M5	93
Tamworth	Moto	M42	95
Taunton Deane NB	Roadchef	M5	93
Taunton Deane SB	Roadchef	M5	96
Tebay NB	Westmorland	M6	98
Tebay SB	Westmorland	M6	98
Telford	Welcome Break	M54	96
Thurrock	Moto	M25	81
Tibshelf NB	Roadchef	M1	94
Tibshelf SB	Roadchef	M1	97
Toddington NB	Moto	M1	86
Toddington SB	Moto	M1	76
Trowell NB	Moto	M1	91
Trowell SB	Moto	M1	87
Warwick NB	Welcome Break	M40	90
Warwick SB	Welcome Break	M40	87
Washington NB	Moto	A1 (M)	76
Washington SB	Moto	A1 (M)	89
Watford Gap NB	Roadchef	M1	93
Watford Gap SB	Roadchef	M1	83
Wetherby	Moto	A1 (M)	84
Winchester NB	Moto	M3	84
Winchester SB	Moto	M3	76
Woodall NB	Welcome Break	M1	92
Woodall SB	Welcome Break	M1	96
Woolley Edge NB	Moto	M1	80
Woolley Edge SB	Moto	M1	93

Q8 Overall, how satisfied are you with your experience at these Motorway Services today?

* Please note: a) The sample sizes at each MSA are around 80; and b) to obtain the most inclusive view of visitor experience, interviews were conducted across locations within MSAs such as main building, the forecourt, HGV areas; and that for each MSA the proportion of interviews achieved at each of these locations varies site to site. These two points should be borne in mind when interpreting individual scores or differences between individual MSAs. Interview numbers for each MSA are in the appendix.

Top reasons given for satisfaction

The main reasons visitors gave for satisfaction relate to cleanliness, reliably getting what you want, and good food choices.



This list is largely consistent across all visitor types. However:

- ✓ Ease of parking (16%) is often mentioned as a reason by *HGV* drivers 
- ✓ Choice of food brands (22%) is also mentioned as a reason by commuters 

“Plenty of room to park, and not miles away from the building”.
HGV (Roadchef)

Top reasons visitors gave for being satisfied

Clean and tidy

“**Clean**, well laid-out and quite pleasant”.
HGV (Welcome Break)

“**Facilities are well-maintained** as far as hygiene and climate go”.
Commuter (Moto)

“It feels like a **new, modern services** - very nice and clean”.
Leisure (Roadchef)

“It’s **clean, tidy** and just offers what is needed”.
Leisure (Moto)

Reliability

“It was where I needed it be and **had the facilities I needed**”.
Business (Welcome Break)

“**Has everything I wanted** facility-wise and opens early”.
Commuter (Moto)

“Nice services - about the **right distance from my starting point** for a break”.
Professional (Welcome Break)

“We have stopped here a few times and have **not experienced any problems** as of yet”.
Leisure (Moto)

Food options

“**Love the food selection** and good service”.
Commuter (Extra)

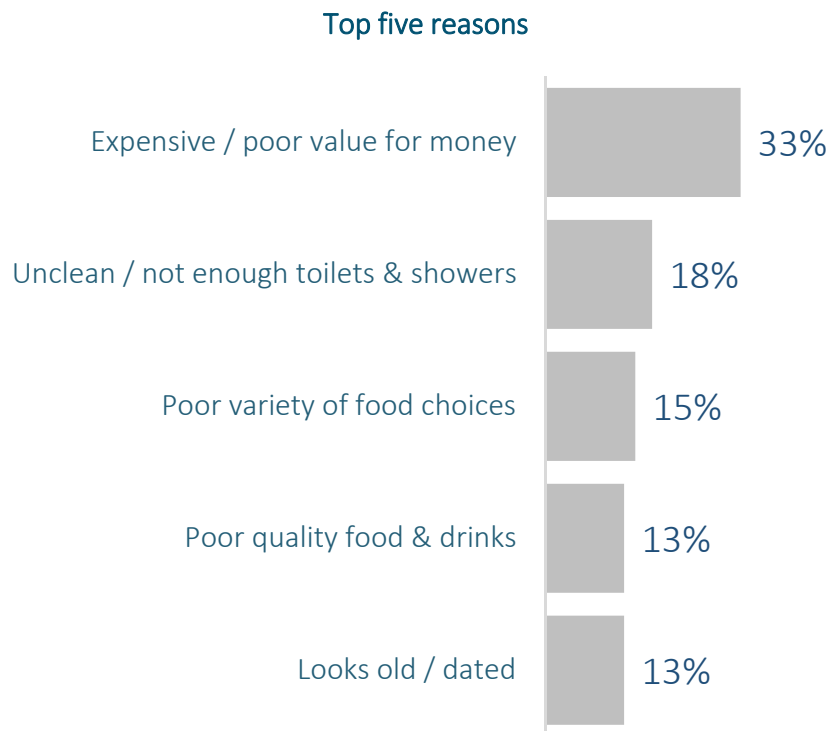
“It’s independent - I like the food outlook as its **unique and locally-sourced food**, not commercial”.
Professional (Westmorland)

“**Nice food and coffee places**, plus good food shop”.
Leisure (EuroGarages)

Top reasons visitors gave for being dissatisfied

Only a small minority (3%) of MSA visitors were dissatisfied with their experience.

Value for money, cleanliness of the toilets and poor variety of food choices were the most common reasons given for dissatisfaction.



Other reasons (amounting to less than 10%) include poor customer service, difficulty parking, unpleasant atmosphere and lack of facilities for HGV drivers to relax and socialise

Value for money

“Prices were **really expensive for food and drink**”.
Leisure (Welcome Break)

“Facilities are a disgrace. Don't cater for truck drivers, but **charge a fortune for stopping here**”.
HGV (Moto)

“**Only get two hours free parking** when sometimes you need to rest for longer”.
Leisure (Roadchef)

Toilets / showers

“The showers - **not fit for purpose**. Smelly, dirty, no locks on doors, and cold water”.
HGV (Moto)

Disgusting conditions of the men's toilets. Flooded floors”.
Leisure (Welcome Break)

“The ladies toilets are **revolting**”.
Business (Extra)

Poor food choice

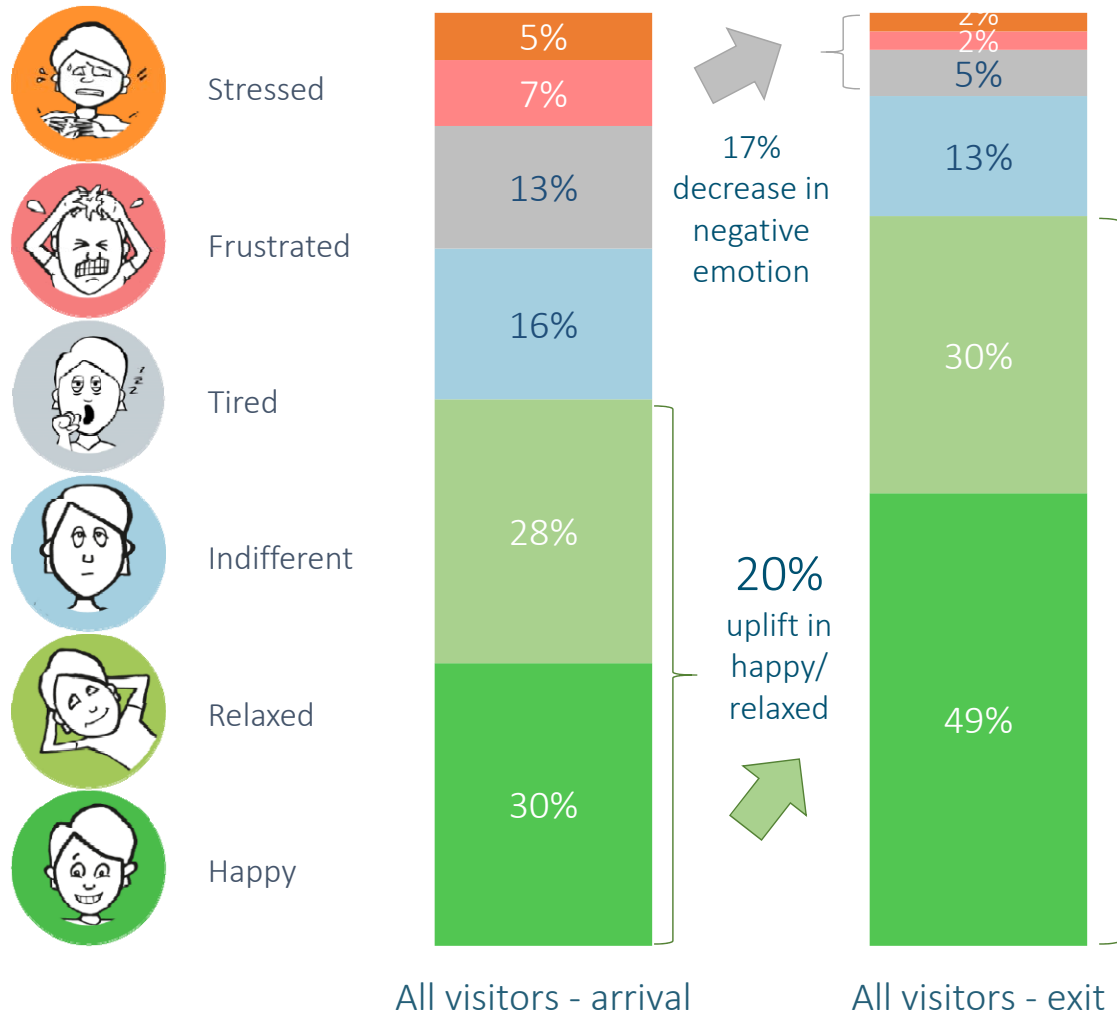
“**Lack of healthy food options!**”.
Business (Roadchef)

“**No freshly cooked food or fresh salads**”.
HGV (Welcome Break)

“Depending on what time I get here the main restaurant is closed and the **only thing open is Burger King**”.
HGV (Moto)

Mood on arrival and exit

Their experience at the MSA had a positive impact on the mood of visitors, with many feeling more happy or relaxed, and less feeling tired, frustrated or stressed. This was reasonably consistent across all visitor types and operators.



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

Mood change between arrival and exit

	Uplift happy & relaxed	Decrease in negative moods
Leisure	21%	16%
Business	21%	19%
Commuter	20%	19%
Professional	16%	17%

Operator Comparison

	Uplift happy & relaxed	Decrease in negative moods
Extra	15%	13%
Moto	20%	17%
Roadchef	20%	17%
Welcome Break	24%	16%
Westmorland	20%	17%

While a lower uplift than other operators, Extra visitors (71%) were much happier on arrival than visitors to other large MSA operators (55% to 60%)

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

The MSA stop had a particularly positive impact on mood the longer visitors had been on the road before stopping. The decrease in negative moods was 24% for those who had been on the road for two hours or more.



Stressed



Frustrated



Tired



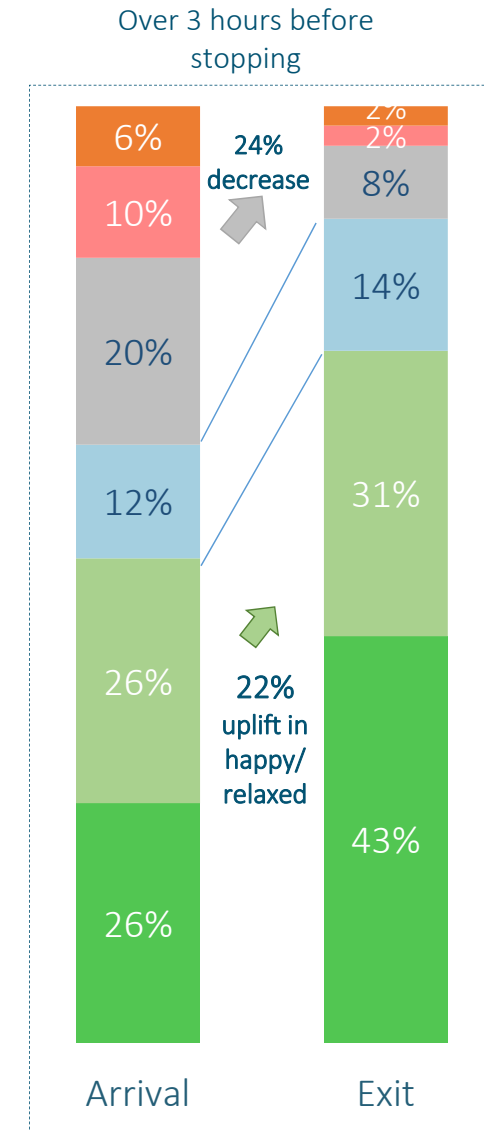
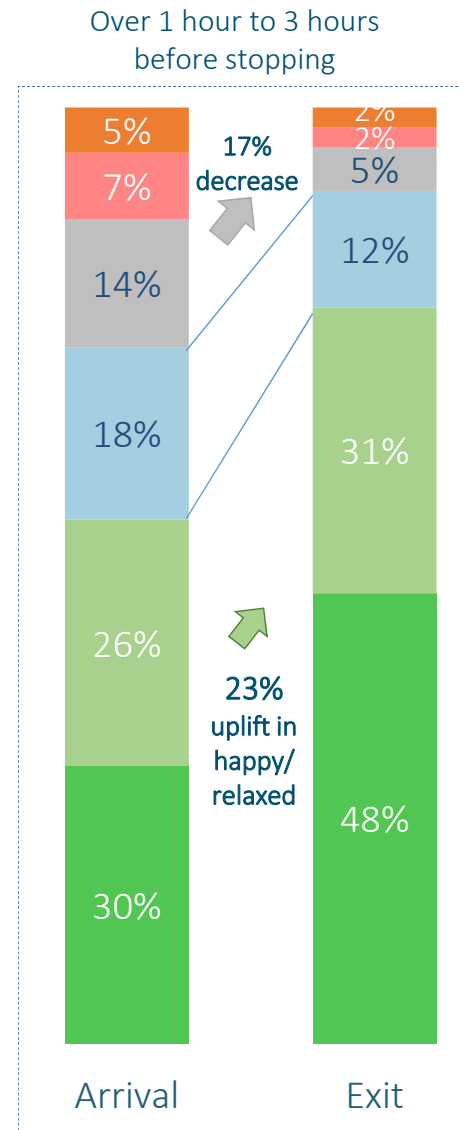
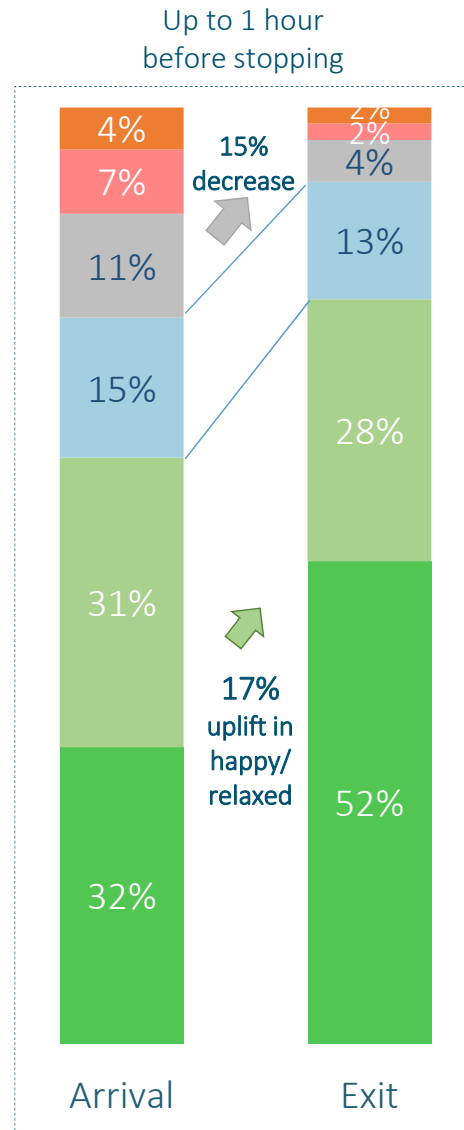
Indifferent



Relaxed



Happy



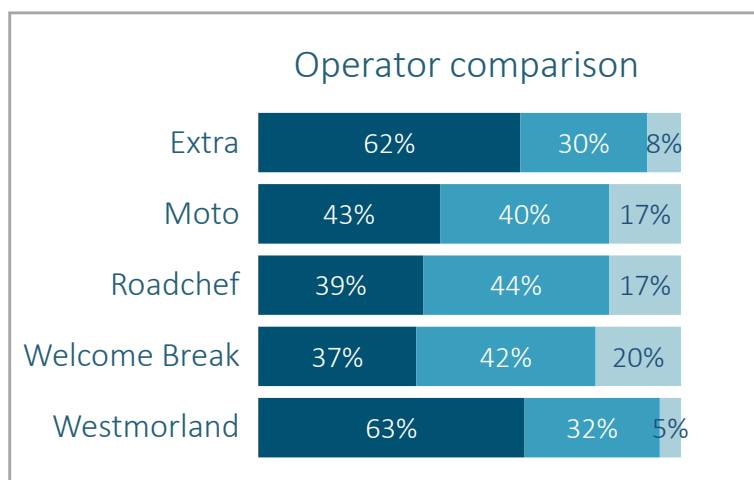
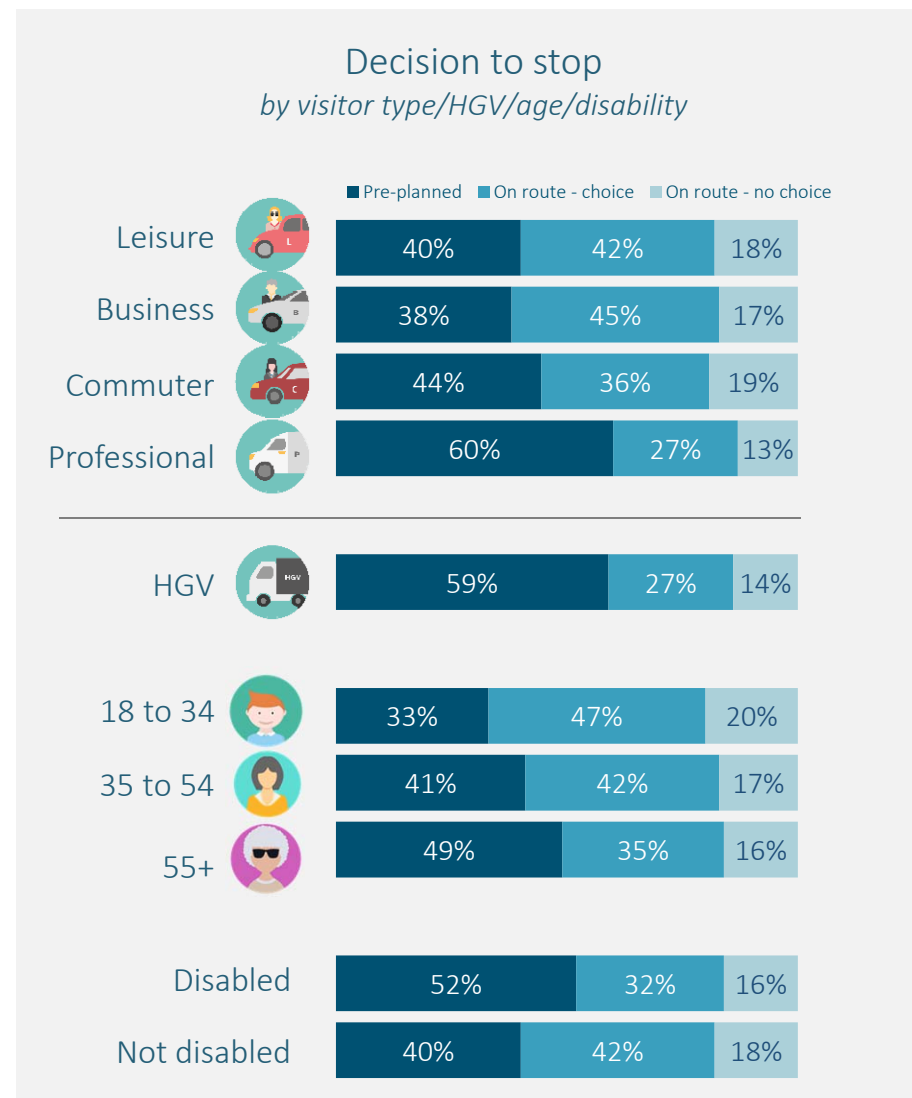
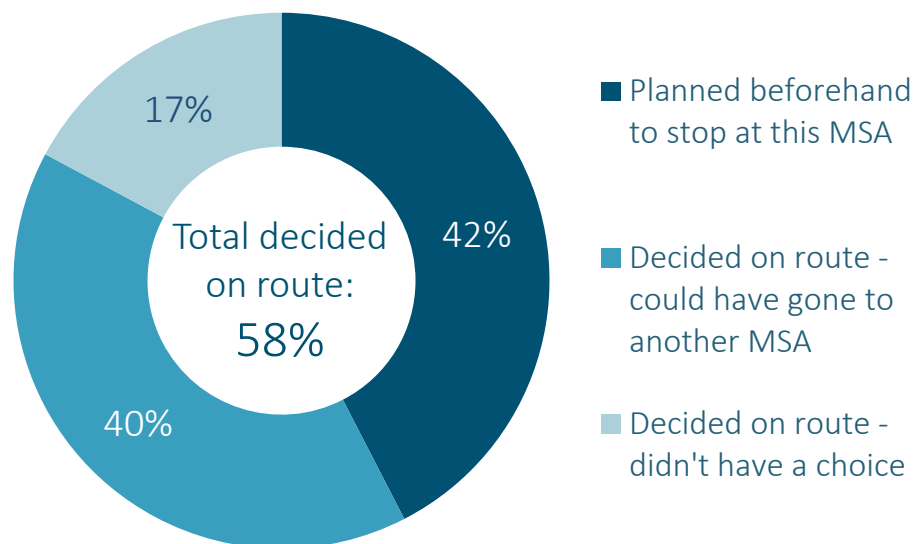
Visitors were shown the icons (but not the word describing it) and asked to choose the one which best relates to their mood on arrival and exit

SECTION 3

Reason for visiting

Decision to stop at this MSA

Two in five visitors planned beforehand to stop at a particular MSA, increasing to three in five among professional visitors.



Q10. In regard to your journey today, did you a) plan to stop beforehand at this particular MSA b) decide on route but could have gone to another MSA or c) decide on route but did not really have a choice? Base: All MSA visitors who are not part of a tour/coach group (8398), All Moto (3352), Roadchef (1737), Extra (442), Welcome Break (2290), Westmorland (326), All Leisure (5297), Business (1536), Commuter (617), Professional (948), HGV (760), 18-34 (1853), 35-54 (3334), 55+ (3179), Disabled (471), Not disabled (7312) – excludes those who preferred not say whether they are disabled

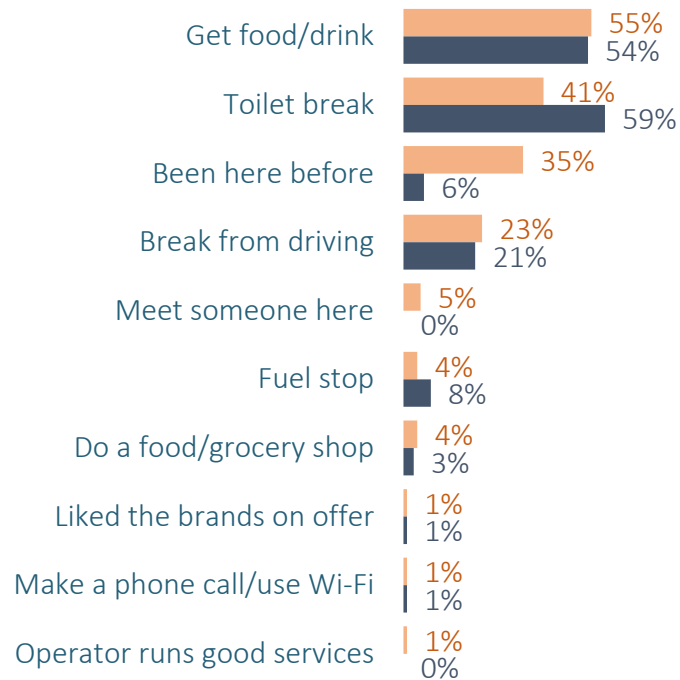
Reasons for visiting

Basic needs such as food/drink and toilet facilities were key reasons visitors mentioned for stopping. For HGV drivers a desire to take a break from driving was the top reason. Stopping for the toilet was a more prominent reason for those deciding on route. Previous visits to that MSA were a greater factor for those who pre-planned to stop.

Pre-planned to stop

Decided on route

All visitors excl. HGV



All HGV drivers



*these answer options were only asked where their visits were pre-planned

More than one answer allowed

SECTION 4

MSA usage

Rating of aspects when arriving at the MSA

Aspects connected with arriving at the MSA were generally rated very positively.



Approach signs

% very % fairly } **92%**
60% 31% } **good**



Slip road

% very % fairly } **89%**
59% 30% } **good**



Car park layout

% very % fairly } **87%**
55% 31% } **good**



Feeling of safety leaving vehicle

% very % fairly } **93%**
61% 32% } **good**



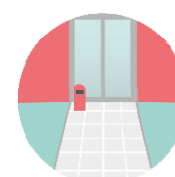
Walk from vehicle to building

% very % fairly } **94%**
64% 30% } **good**



Impression of building outside

% very % fairly } **81%**
45% 36% } **good**



Impression of building inside

% very % fairly } **85%**
47% 38% } **good**



Wi-Fi*

% very % fairly } **75%**
42% 33% } **good**

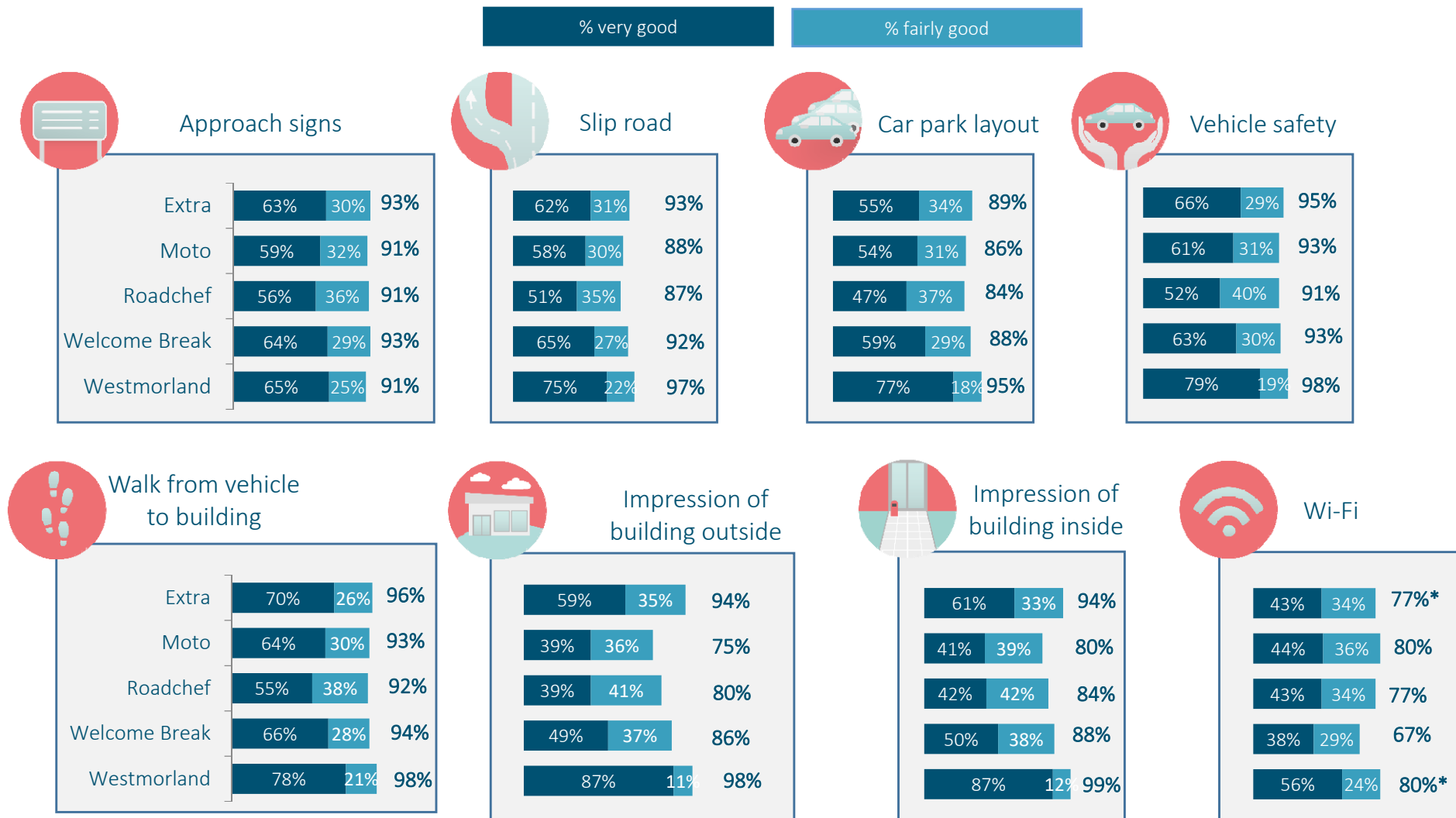
Most attributes are consistent across visitor types. However:

- ✓ Although still high, HGV drivers gave lower ratings for layout of the parking area (74% good), the security of their vehicle (86%) and walk to the building (87%)



Rating of aspects when arriving at the MSA (by operator)

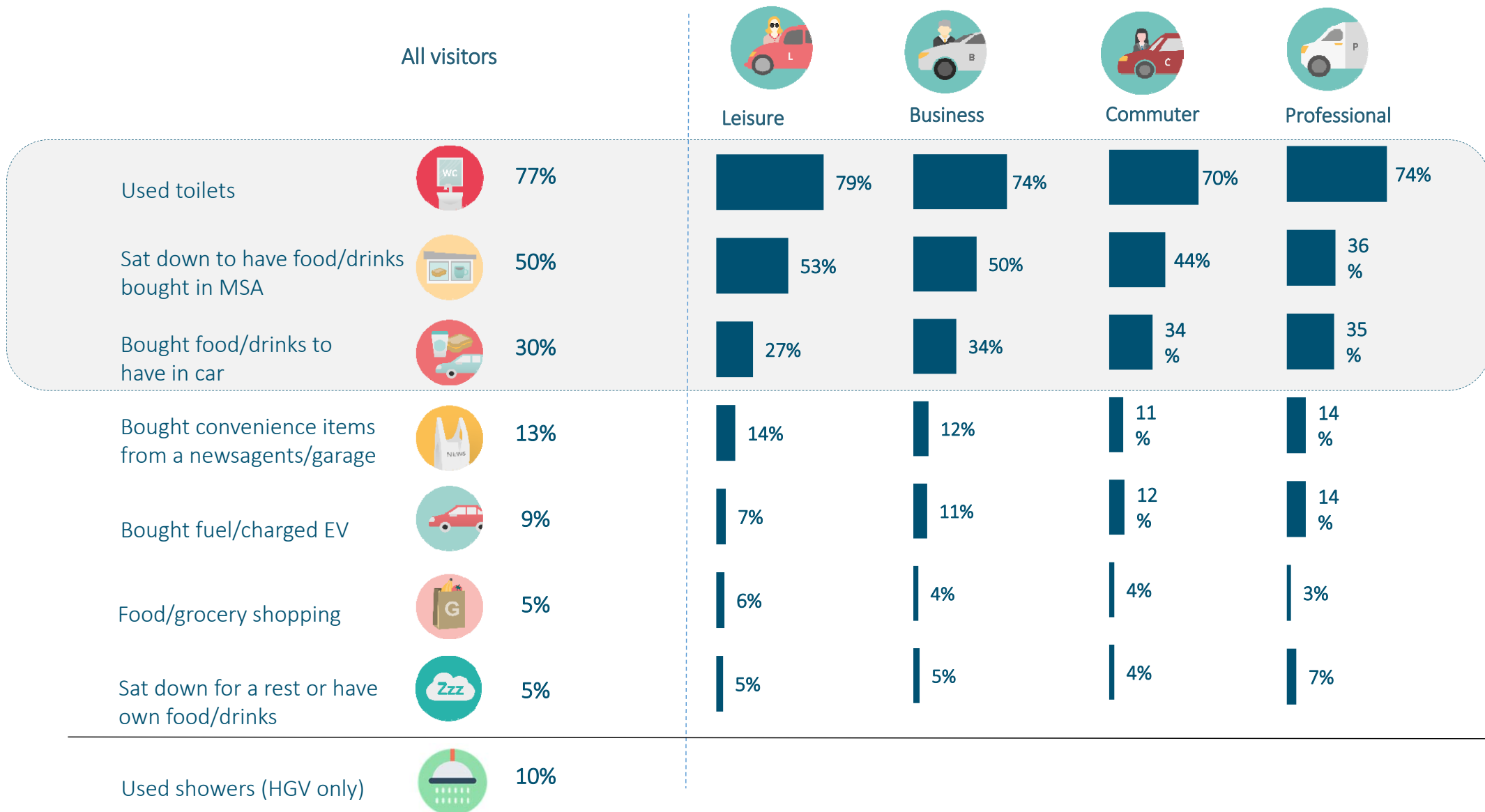
Although aspects connected with arriving at the MSA were generally rated well, on impression of the building inside there are more notable differences between operators.



*low base size

Facilities used at the MSA

The facilities used at the MSA were largely consistent across the four main visitor types, with around three quarters using the toilets and around half sitting down to have food or drinks they bought in the MSA, although this is lower among professional visitors.



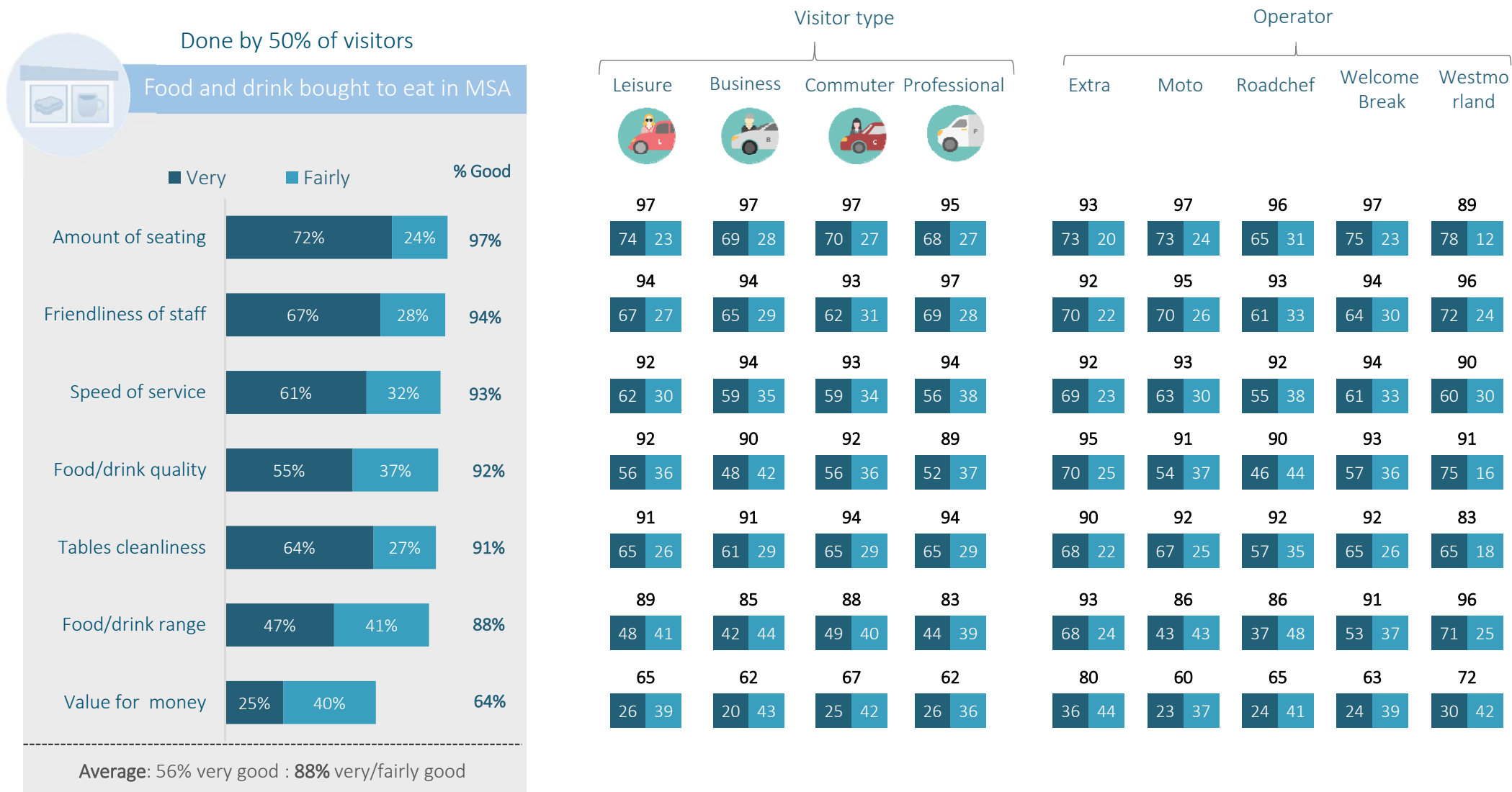
Rating of facilities used [Toilets]

Individual elements related to the toilets are rated positively, although the quality of fixtures is rated slightly lower. Scores are slightly higher amongst leisure visitors.



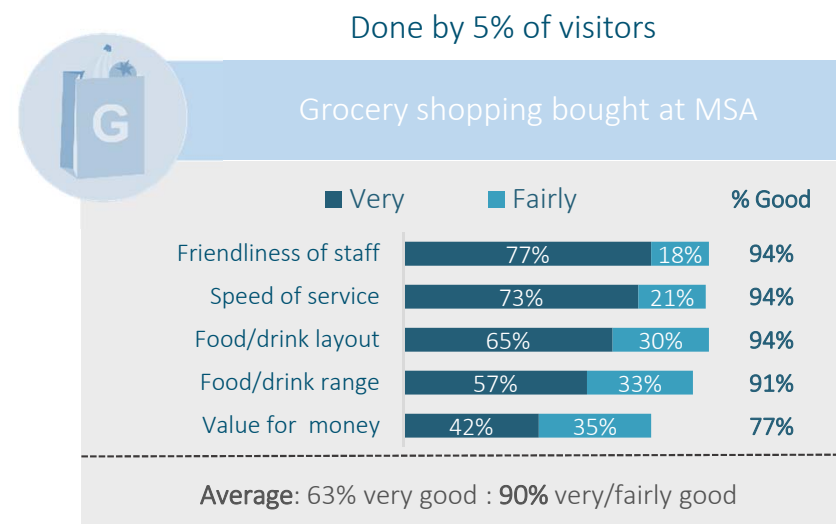
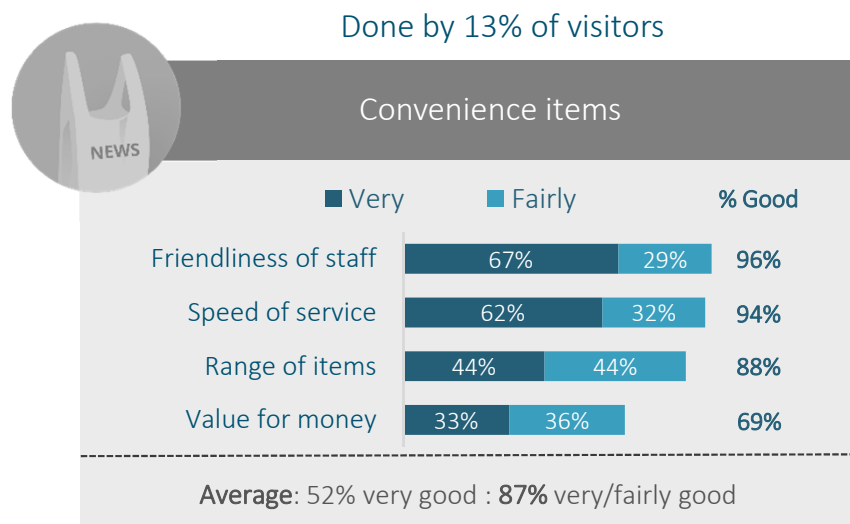
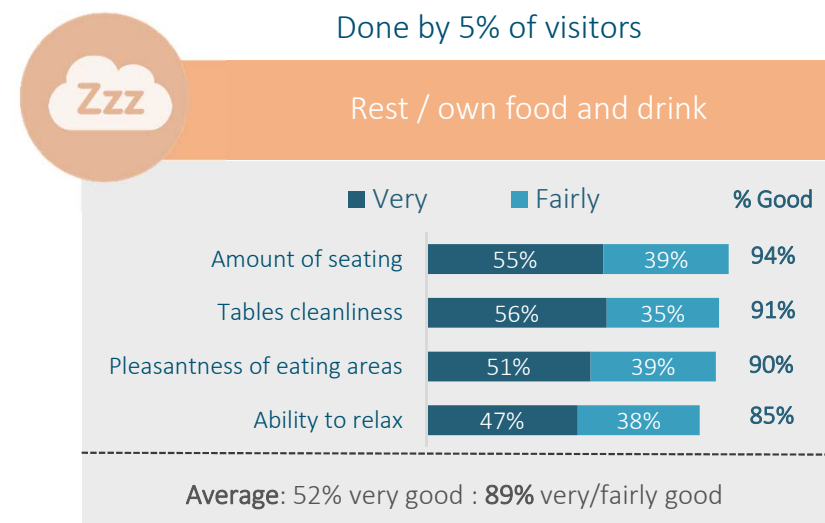
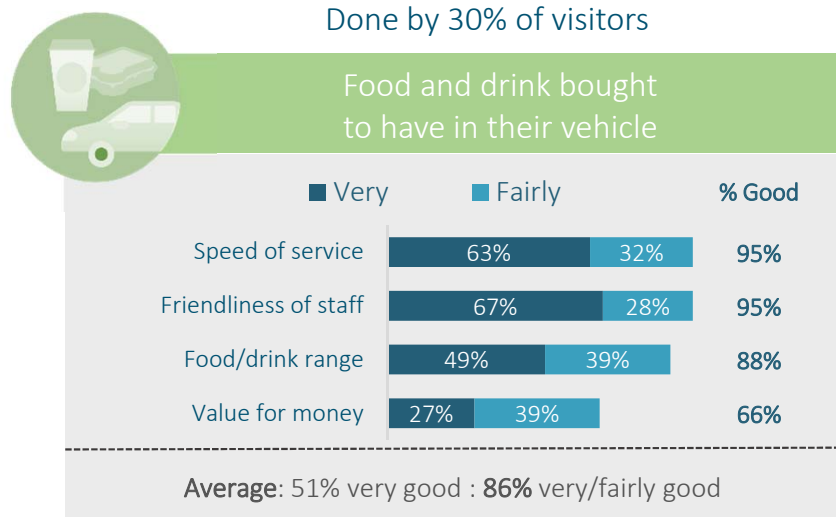
Rating of facilities used [Food and drink to eat in MSA]

Having food and drink within the MSA is also rated highly, particularly the amount of seating, friendliness of staff and speed of service. Value for money has the lowest rating, although two thirds still rate this as 'good'. Scores are consistent across different visitor types.



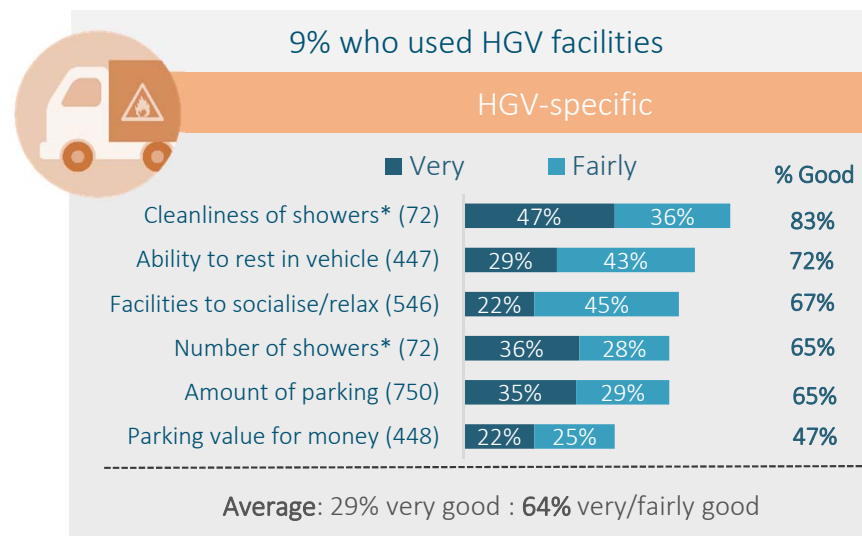
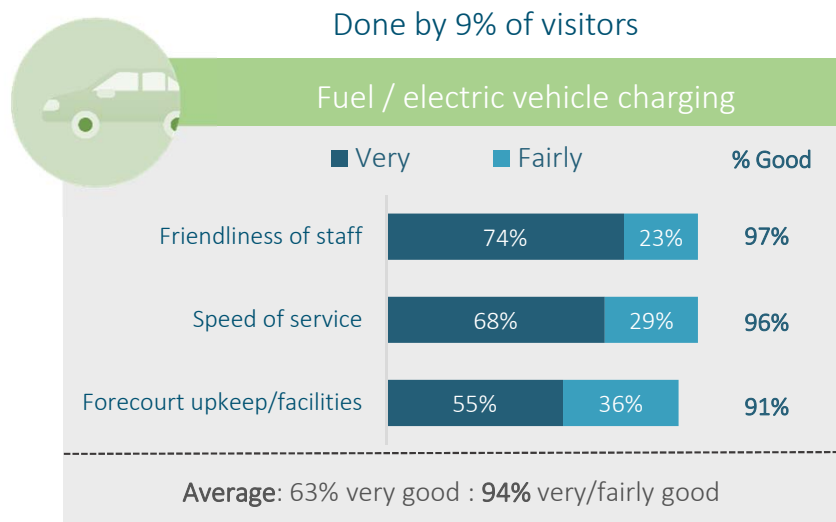
Rating of other facilities used [1]

Friendliness of staff and speed of service are consistently highly rated across both food and drink to have in their vehicle, convenience items and grocery items. Again value for money was rated lower. Aspects related to resting and having your own food and drink are rated positively.



Rating of other facilities used [2]

Aspects related to getting fuel are rated positively. HGV drivers typically rate specific HGV elements of the MSA less positively than other aspects, including facilities to socialise, the number of showers, amount of parking and particularly the value for money of the parking package.



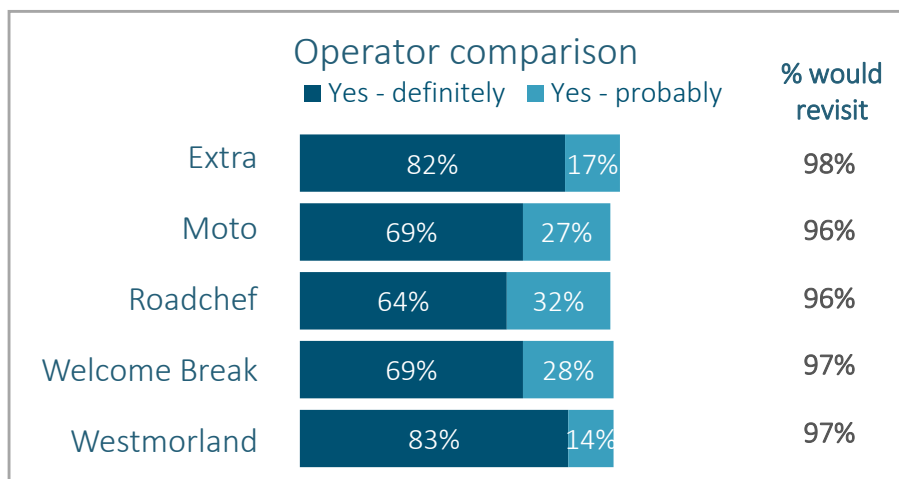
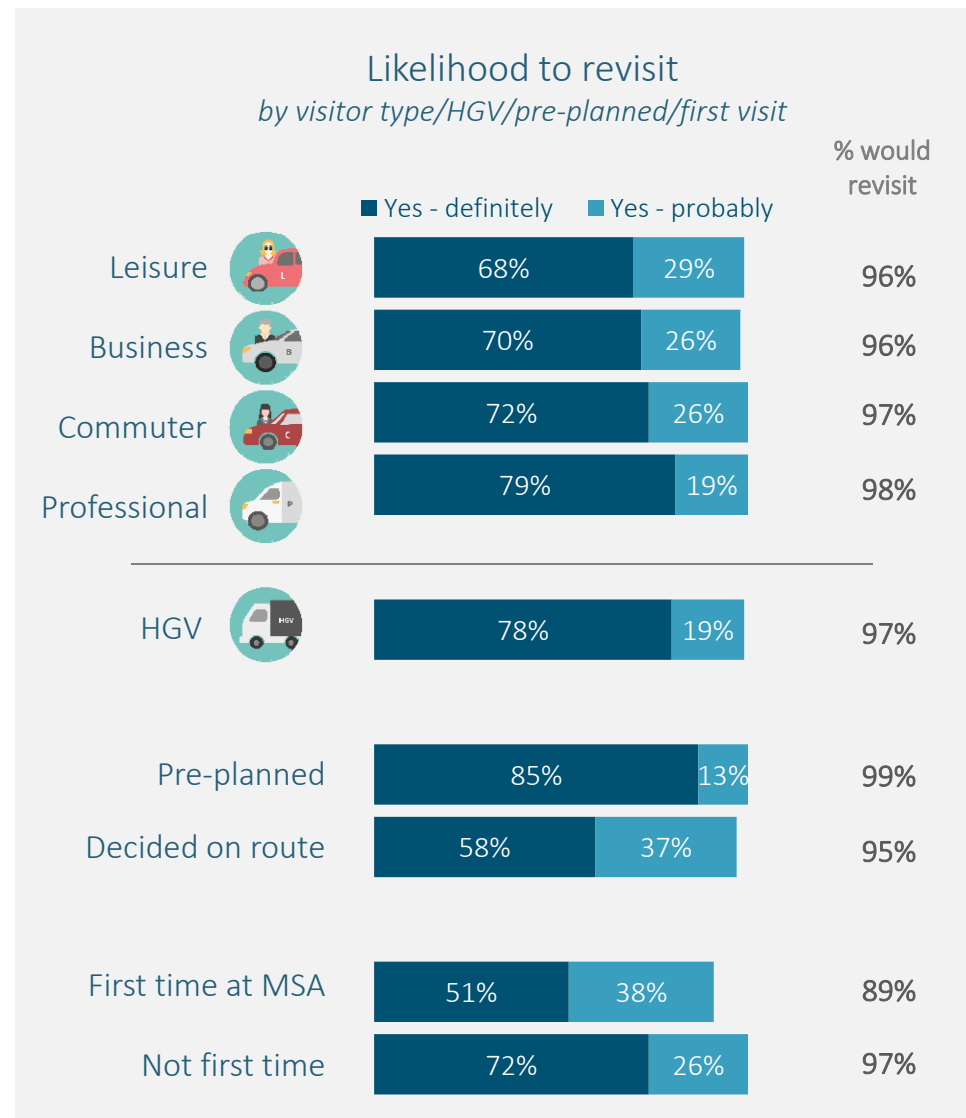
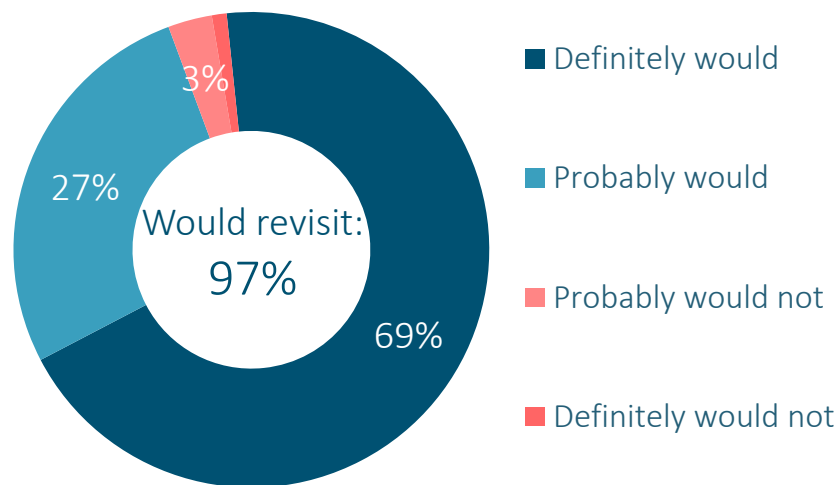
* Low base size

SECTION 5

Improvements

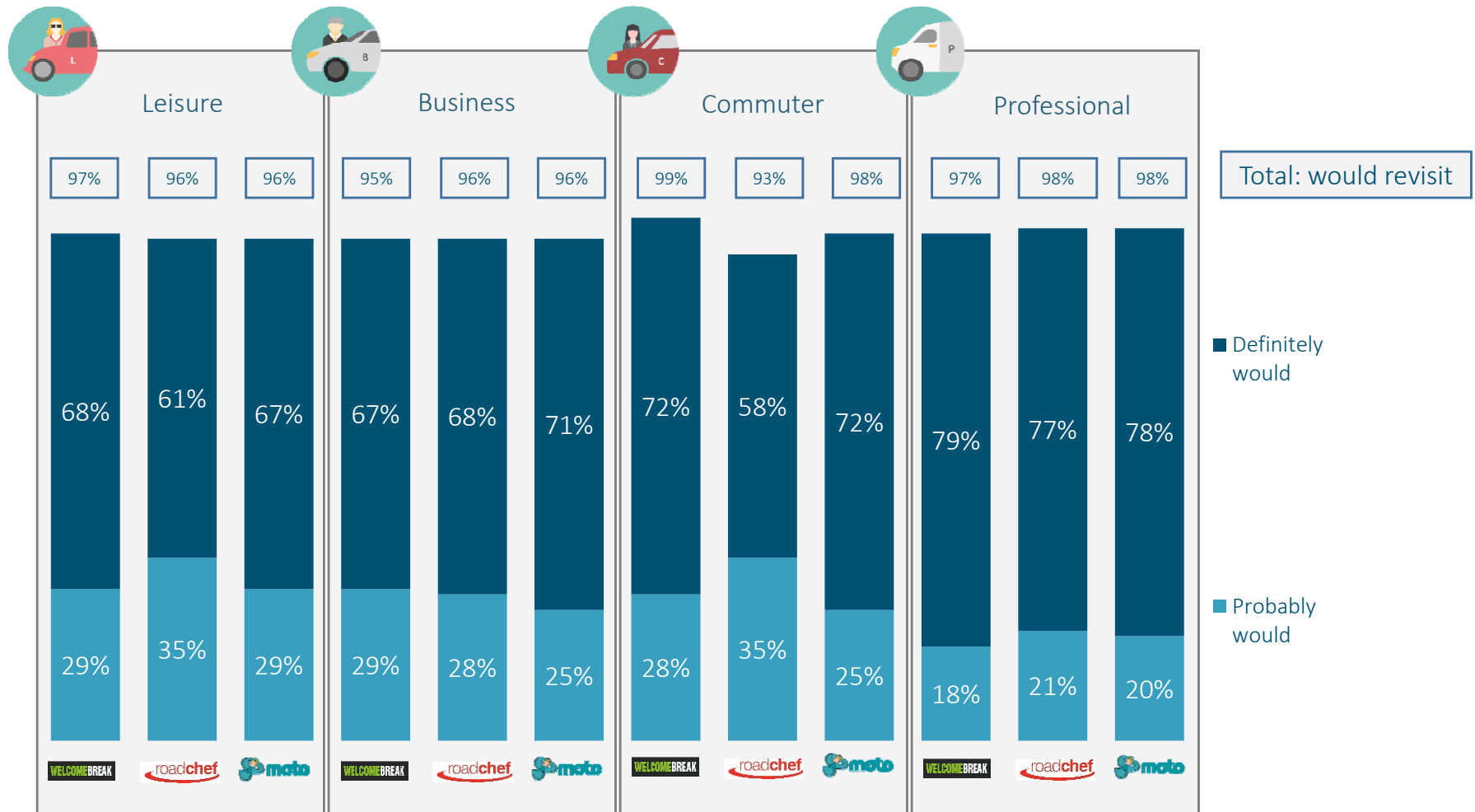
Likelihood to revisit

Almost everyone claimed they would be likely to stop in future at the particular MSA where we spoke to them. Professional visitors expressed a greater degree of certainty.



Likelihood to revisit (by visitor type and MSA operator)

Likelihood to revisit is largely consistent by visitor type and across the three largest operators.

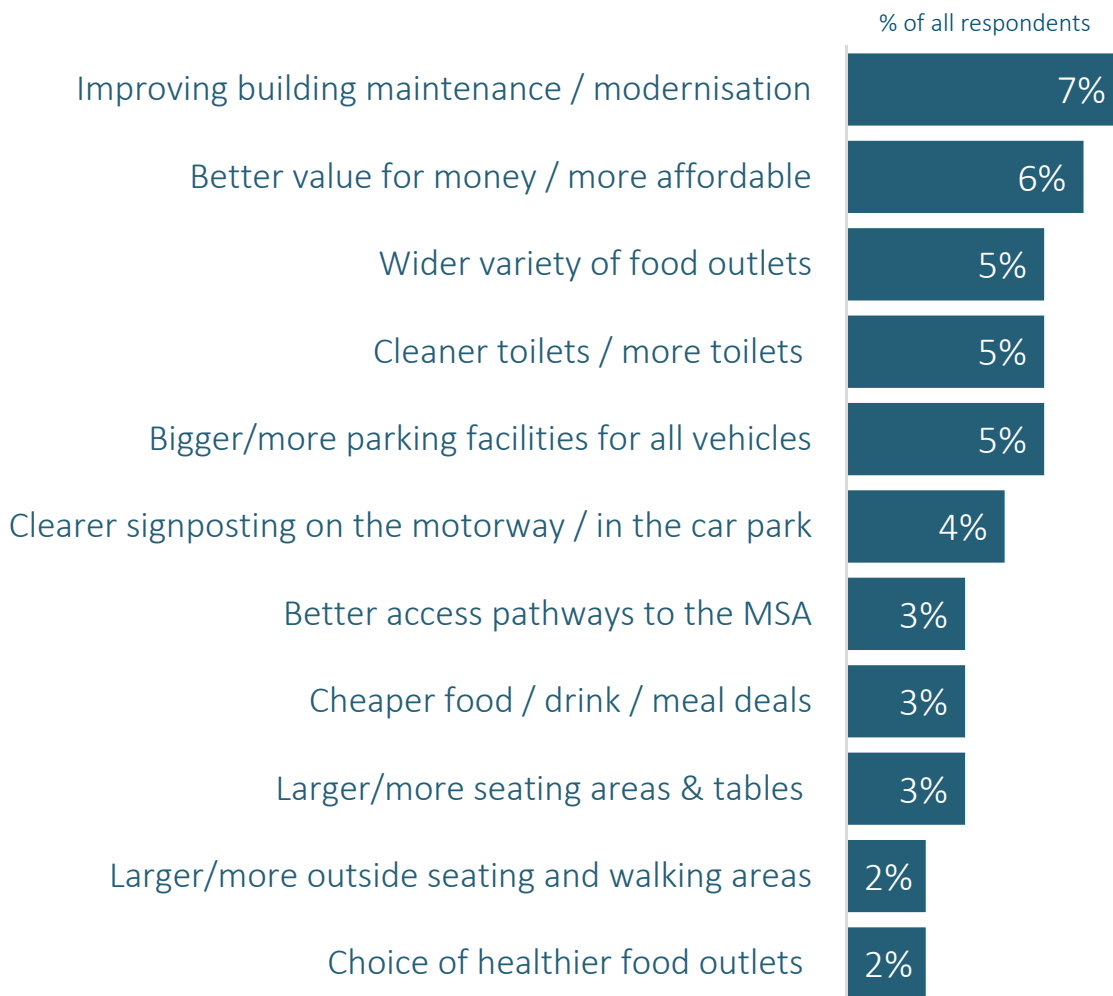


N.B. base sizes for the other MSA operators are too small to split by visitor type

Visitors' suggestions for improvement

43% said there was nothing in particular that needed improving

Of the remaining 57% who did suggest improvements, modernisation, better value for money and a wider variety of food outlets were the key themes, as shown below:



This list is largely consistent across all visitor types. However:

- ✓ Bigger/more parking facilities (22%) are often mentioned by HGV drivers
- ✓ Unlike other groups, many HGV drivers also mention bigger/better shower facilities (8%) and cheaper parking (6%)

“Better showering facilities and **more HGV parking spaces**”.
HGV (Welcome Break)

“**Better facilities for HGV drivers** as we do long hours and deserve good quality facilities at a reasonable price”.
HGV (Moto)

Visitors' suggestions for improvement

Of those who did suggest improvements, modernisation, better value for money and a wider variety of food outlets were the key themes

Building maintenance/modernisation

"A complete refurb is needed – it's **looking very dated and tired inside and out**".
Business (Moto)

"I think it's ready for a **refit** - it's been like this as long as I can remember and it's all looking a bit old now".
Leisure (Moto)

"Decor **looking tired** and doesn't look overly clean".
Leisure (Extra)

"It's a bit **run down** - it needs a refurb. The reception area smells as if it needs a clean".
Leisure (Welcome Break)

Value for money

"Prices of **some items are too dear**".
Commuter (Westmorland)

"I would like to see **high street prices** – the money they are earning is a disgrace".
Commuter (Roadchef)

"**Price cuts** for HGV drivers".
HGV (Welcome Break)

"I would like to see **more reasonably-priced shops**, Greggs is good value but the likes of Costa charge very expensive prices".
Leisure (Moto)

Variety of food

"They need to **update their food choices** – if I brought old visitors in, they would not want Subway".
Professional (Welcome Break)

"An improvement in price and quality of products, **having national chains is lazy**. They should be more creative".
Leisure (Moto)

"**More old-style hot meals**, including cooked breakfasts".
Business (Welcome Break)

"**Better range of food** – not just McDonald's or other fast food".
HGV (Roadchef)

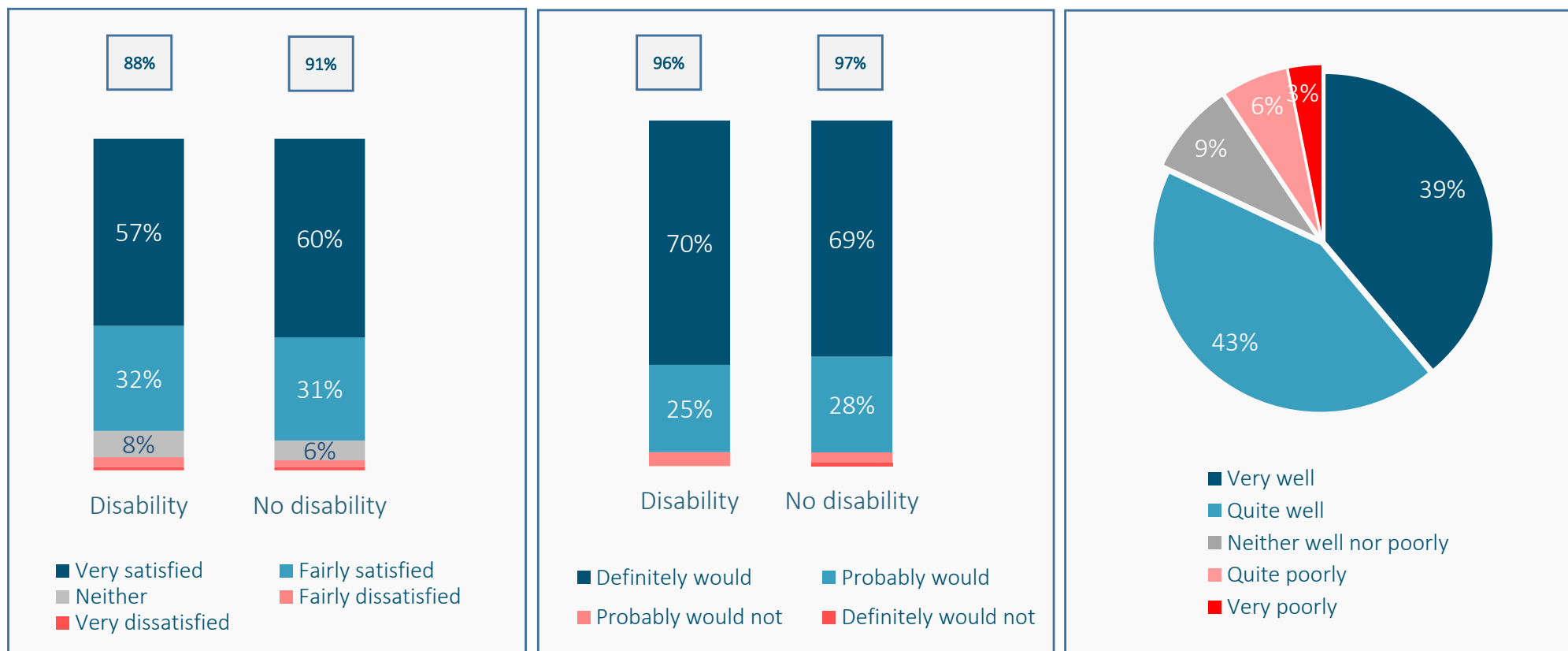
Visitors with a disability (1)

Visitors with a disability were similarly satisfied with their experience at the MSA as other visitors. They would be equally likely to revisit as those without a disability. Four fifths of those with a disability said the MSA catered well for their needs; although nine per cent thought the MSA catered poorly.

Overall satisfaction

Likelihood to revisit

How well MSA catered for users' disabilities



"It's clean and bright and have **good disabled toilets**"
Leisure (Moto)

"As a disabled person, the **nearness of the parking and toilets is good**. Normally you have to walk miles"
Business (Welcome Break)

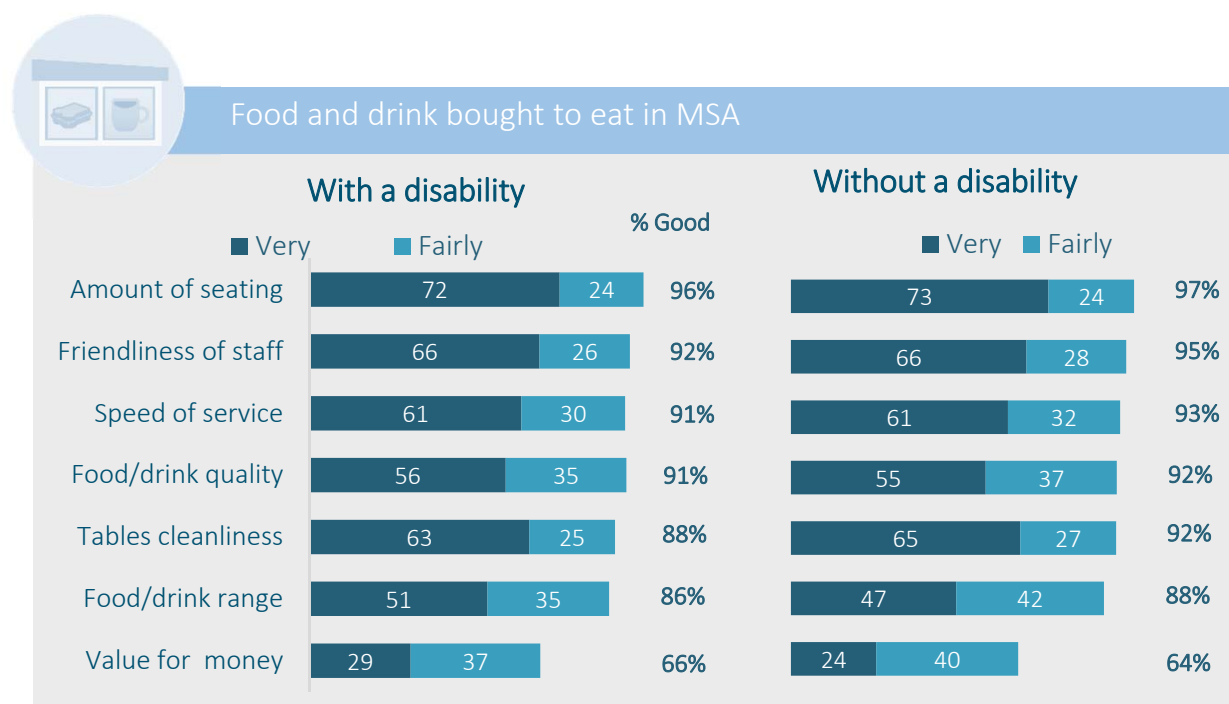
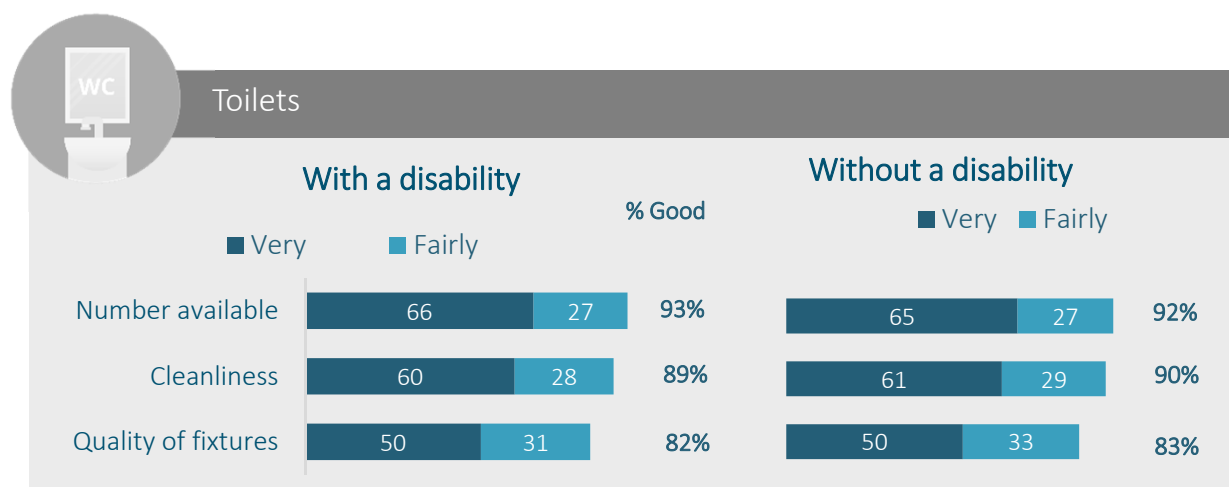
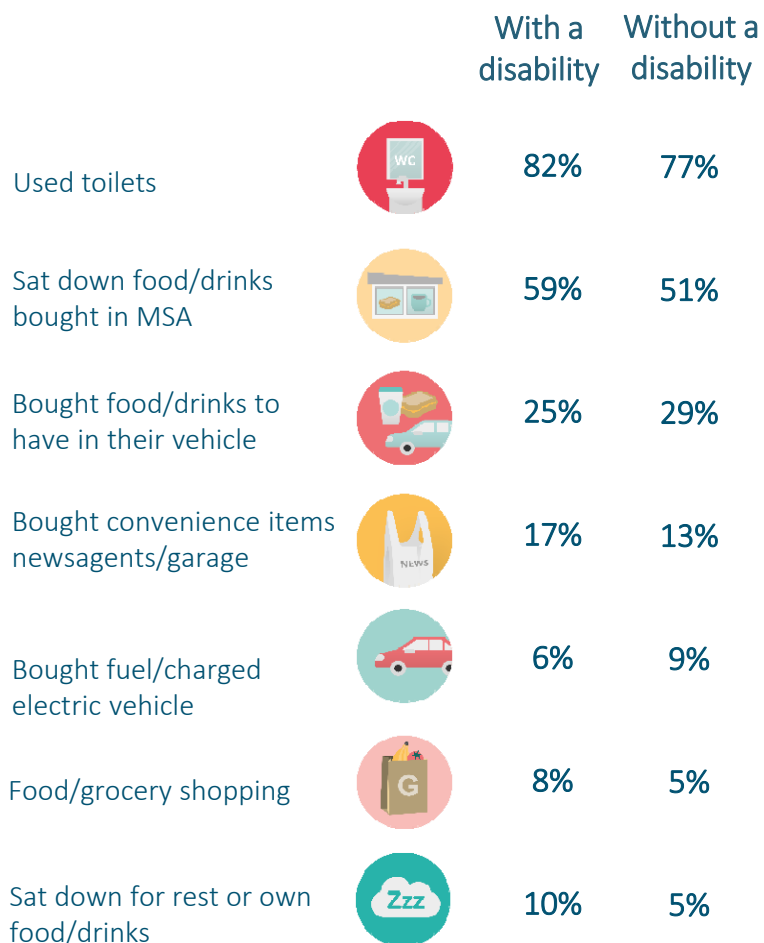
"Disabled **toilets are good**"
Leisure (Roadchef)

"Seemed to **cater pretty well for disabled people like me**"
Leisure (Moto)

Visitors with a disability (2)

Visitors with a disability use the toilets more and buy food to eat at the MSA more

Those with a disability rate aspects of toilets and/or eating food bought there very similarly

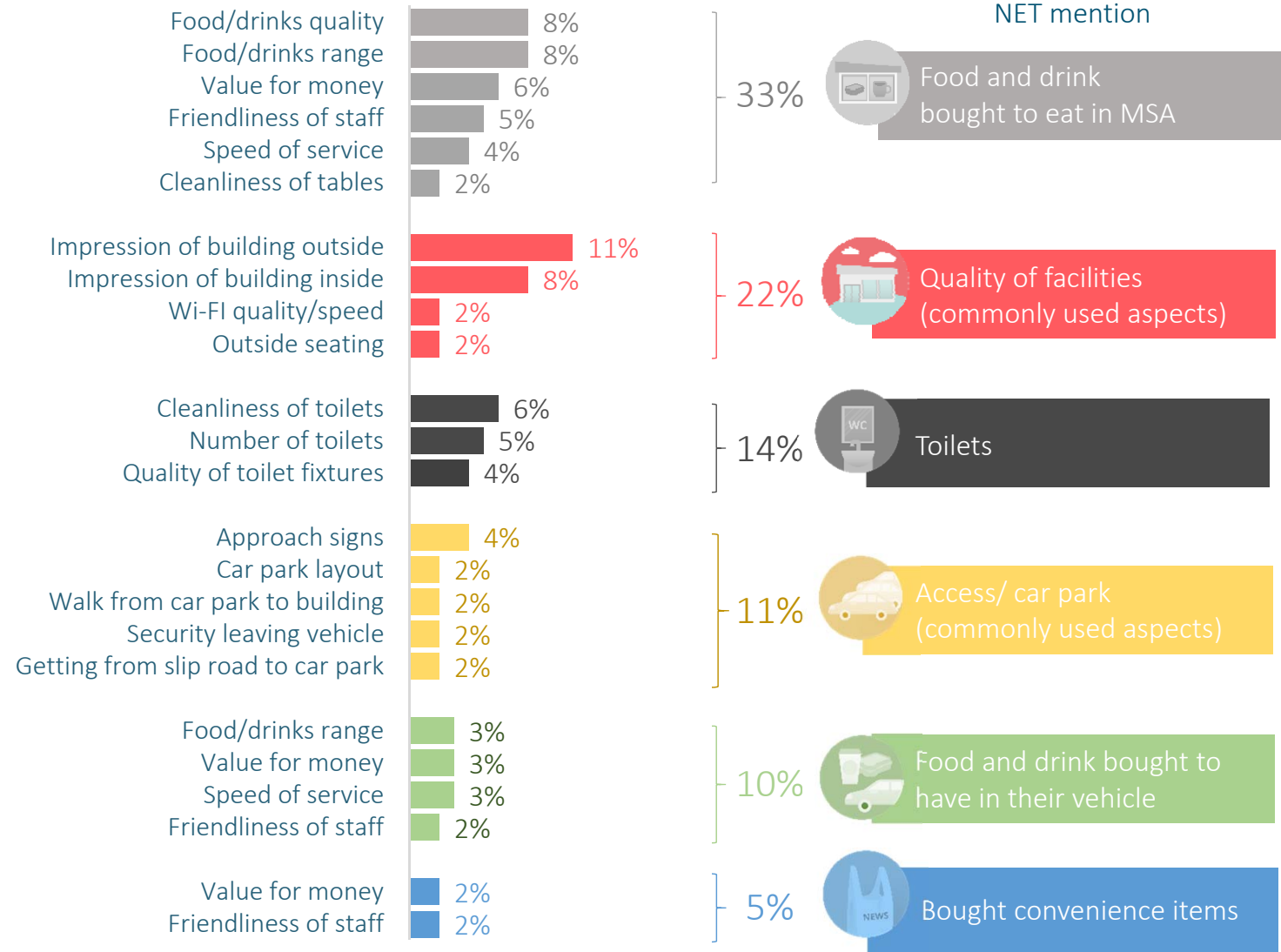


What drives MSA satisfaction (all visitors except those driving an HGV)

Aspects relating to the food and drink bought to eat in the MSA are the lead drivers of satisfaction. Impression of the inside and outside of the building are also important.

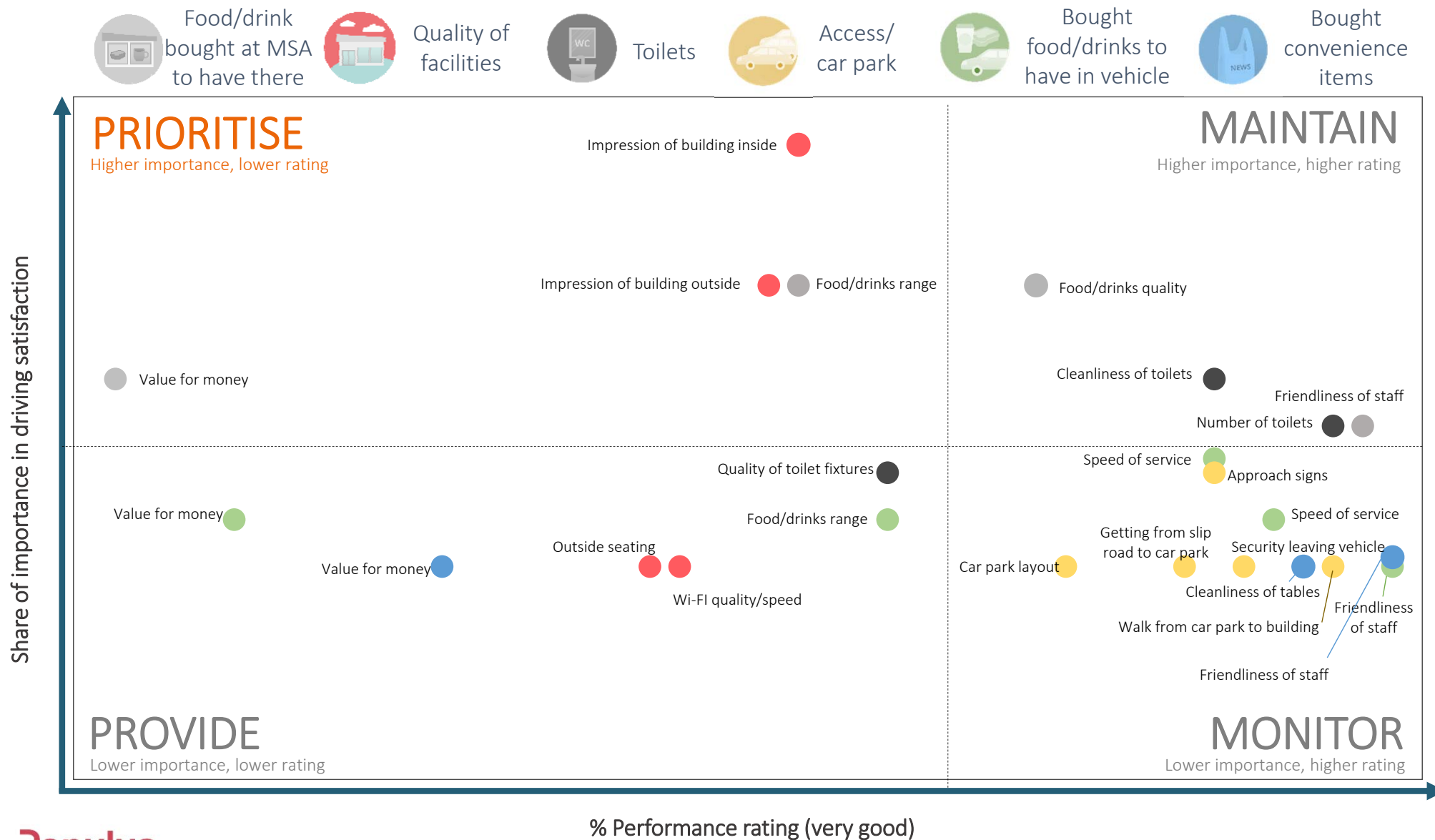
% share of impact on overall satisfaction with the MSA

Key Driver analysis, based on regression modelling, has been used to determine how much different MSA elements impact on visitors' overall satisfaction. On the next slide, we overlay these key drivers scores with current performance, on a prioritisation matrix



Prioritising improvement – all visitors except those driving an HGV (ratings vs. importance)

Impressions of the building and the range and value for money of food and drinks bought to eat in the MSA are aspects having higher impact on satisfaction, but are aspects where operators are performing relatively less well. The quality of food and drinks, friendliness of staff and number of (clean) toilets are areas which should be maintained, as these are also higher drivers of satisfaction.

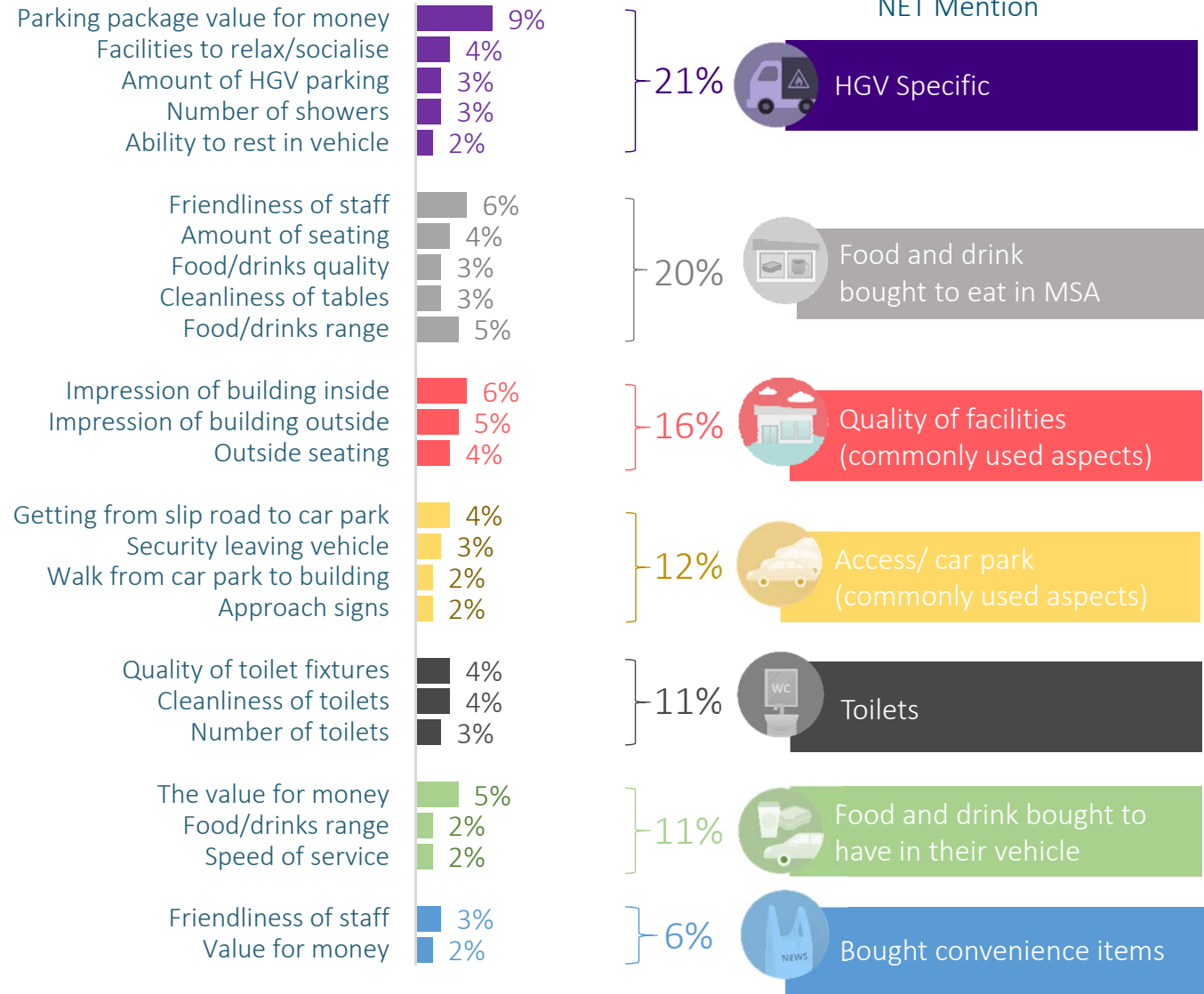


What drives MSA satisfaction (all HGV drivers)

Impressions of the MSA buildings are important for HGV drivers, but they place greater importance on the value for money of the parking package. While still a factor in driving satisfaction, food and drink bought to eat in the MSAs is less important to HGV drivers than the wider visitor population.

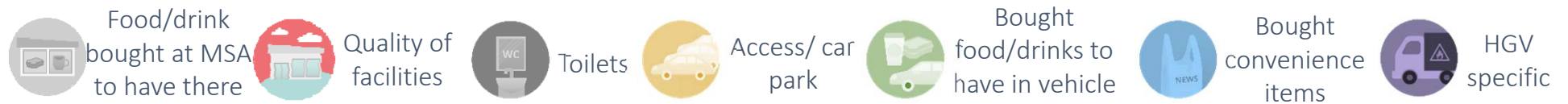
% share of impact on overall satisfaction with the MSA

Key Driver analysis, based on regression modelling, has been used to determine how much different MSA elements impact on visitors' overall satisfaction. On the next slide, we overlay these key drivers scores with current performance, on a prioritisation matrix



Prioritising improvement – HGV drivers (ratings vs. importance)

Among HGV drivers, the value for money of the parking package and the range and value for money of food and drink to takeaway have a higher impact on satisfaction but are areas where operators perform relatively less well. Impressions of the building inside and out are also important for HGV drivers, in line with the wider visitor population.



SECTION 6

Overall summary

Overall summary

90% of visitors are satisfied with their overall MSA experience; consistent across the five main MSA operators

- ❖ Satisfaction is slightly lower for professional visitors of whom approx. two thirds were HGV drivers; although it is still high.
- ❖ Notably the levels of very satisfied made up a good majority of the satisfaction among most visitor groups.
- ❖ Top reasons visitors state for being satisfied are cleanliness, being able to get what you want, and choice of food options.

Of the aspects relating to arrival at an MSA, approach signs, slip roads, vehicle safety and the walk to the building are all rated 'good' 85% or more of the time

- ❖ However, impressions of the building outside and inside and Wi-Fi are rated lower (between 75% and 85%)

The main activity done at MSAs is to use the toilets (approx. three quarters), followed by purchasing food and drink to eat in (approx. half), then purchasing food and drink to have in their vehicle (approx. one third).

- ❖ 9 in 10 rated the cleanliness and number of toilets available as good, but quality of toilet fixtures was lower at eight in 10.
- ❖ For buying food to eat in over 9 in 10 rated the quality, amount of seating, cleanliness, speed of service and friendliness of staff as good; ratings for range of food were slightly lower at 88%. For value for money around two thirds rated this good.

Visiting MSAs has an appreciable impact on temperament. Compared to arrival, 20% more visitors left an MSA feeling happy/relaxed and 17% more visitors left feeling less tired, frustrated or stressed

- ❖ Visitors typically stopped after 90 minutes on the road. Around four in ten planned beforehand to stop at a particular MSA

External and internal impressions of MSA buildings, plus the range and value for money of food to eat in, are higher drivers of satisfaction and areas where operators perform relatively less well

- ❖ The value for money of the parking package is important for HGV drivers, as is the range and cost of food to have in their vehicle.

SECTION 7

Appendix

List of motorway service areas [1]

We conducted interviews at the following 112 motorway service areas in England:

Motorway service area	Operator	Road	Interviews
Baldock	Extra	A1 (M)	81
Beaconsfield	Extra	M40	75
Birch EB	Moto	M62	82
Birch WB	Moto	M62	86
Birchanger Green	Welcome Break	M11	80
Blackburn with Darwen	Extra	M65	72
Blyth	Moto	A1 (M)	73
Bridgwater	Moto	M5	77
Burton-in-Kendal	Moto	M6	79
Burtonwood	Welcome Break	M62	61
Charnock Richard NB	Welcome Break	M6	77
Charnock Richard SB	Welcome Break	M6	84
Cherwell Valley	Moto	M40	83
Chester	Roadchef	M56	81
Chieveley	Moto	M4	81
Clacket Lane EB	Roadchef	M25	57
Clacket Lane WB	Roadchef	M25	66
Cobham	Extra	M25	78
Corley NB	Welcome Break	M6	79
Corley SB	Welcome Break	M6	80
Cullompton	Extra	M5	63
Doncaster North	Moto	M18	71
Donington Park	Moto	M1	81
Durham	Roadchef	A1 (M)	109
Exeter	Moto	M5	87
Ferrybridge	Moto	M62	70
Fleet NB	Welcome Break	M3	115
Fleet SB	Welcome Break	M3	40

Motorway service area	Operator	Road	Interviews
Folkestone	Stop24	M20	78
Frankley NB	Moto	M5	83
Frankley SB	Moto	M5	85
Gloucester NB	Westmorland	M5	76
Gloucester SB	Westmorland	M5	87
Gordano	Welcome Break	M5	75
Hartshead Moor EB	Welcome Break	M62	67
Hartshead Moor WB	Welcome Break	M62	89
Heston EB	Moto	M4	69
Heston WB	Moto	M4	68
Hilton Park NB	Moto	M6	80
Hilton Park SB	Moto	M6	78
Hopwood Park	Welcome Break	M42	80
Keele NB	Welcome Break	M6	75
Keele SB	Welcome Break	M6	74
Killington Lake	Roadchef	M6	81
Knutsford NB	Moto	M6	87
Knutsford SB	Moto	M6	77
Lancaster NB	Moto	M6	71
Lancaster SB	Moto	M6	80
Leicester Forest East NB	Welcome Break	M1	71
Leicester Forest East SB	Welcome Break	M1	82
Leigh Delamere EB	Moto	M4	78
Leigh Delamere WB	Moto	M4	88
London Gateway	Welcome Break	M1	68
Maidstone	Roadchef	M20	58
Medway EB	Moto	M2	60
Medway WB	Moto	M2	51

List of motorway service areas [2]

We conducted interviews at the following 112 motorway service areas in England:

Motorway service area	Operator	Road	Interviews
Membury EB	Welcome Break	M4	71
Membury WB	Welcome Break	M4	81
Michaelwood NB	Welcome Break	M5	82
Michaelwood SB	Welcome Break	M5	86
Newport Pagnell NB	Welcome Break	M1	76
Newport Pagnell SB	Welcome Break	M1	75
Northampton NB	Roadchef	M1	75
Northampton SB	Roadchef	M1	81
Norton Canes	Roadchef	M6 TOLL	80
Oxford	Welcome Break	M40	68
Pease Pottage	Moto	M23	74
Peterborough	Extra	A1 (M)	84
Reading EB	Moto	M4	83
Reading WB	Moto	M4	82
Rivington NB	EuroGarages	M61	72
Rivington SB	EuroGarages	M61	78
Rownhams NB	Roadchef	M27	79
Rownhams SB	Roadchef	M27	83
Sandbach NB	Roadchef	M6	90
Sandbach SB	Roadchef	M6	68
Sedgemoor NB	Welcome Break	M5	86
Sedgemoor SB	Roadchef	M5	90
Severn View	Moto	M48	59
South Mimms	Welcome Break	M25	82
Southwaite NB	Moto	M6	70
Southwaite SB	Moto	M6	90
Stafford NB	Moto	M6	92
Stafford SB	Roadchef	M6	60

Motorway service area	Operator	Road	Interviews
Strensham NB	Roadchef	M5	80
Strensham SB	Roadchef	M5	80
Tamworth	Moto	M42	80
Taunton Deane NB	Roadchef	M5	94
Taunton Deane SB	Roadchef	M5	84
Tebay NB	Westmorland	M6	90
Tebay SB	Westmorland	M6	87
Telford	Welcome Break	M54	80
Thurrock	Moto	M25	74
Tibshelf NB	Roadchef	M1	79
Tibshelf SB	Roadchef	M1	67
Toddington NB	Moto	M1	80
Toddington SB	Moto	M1	83
Trowell NB	Moto	M1	87
Trowell SB	Moto	M1	83
Warwick NB	Welcome Break	M40	80
Warwick SB	Welcome Break	M40	79
Washington NB	Moto	A1 (M)	88
Washington SB	Moto	A1 (M)	94
Watford Gap NB	Roadchef	M1	74
Watford Gap SB	Roadchef	M1	71
Wetherby	Moto	A1 (M)	81
Winchester NB	Moto	M3	79
Winchester SB	Moto	M3	72
Woodall NB	Welcome Break	M1	75
Woodall SB	Welcome Break	M1	73
Woolley Edge NB	Moto	M1	56
Woolley Edge SB	Moto	M1	70