



Motorway Services User Survey

Spring 2018



Foreword

Transport Focus is delighted to have worked successfully with motorway service area (MSA) operators to undertake our Motorway Services User Survey for the second year.

In 2017 we carried out the first large-scale survey across all of England's MSAs, exploring many aspects of satisfaction with the customer experience. We are pleased to have repeated that research so that we, and MSA operators, can benchmark results and measure improvements.

We tested how visiting an MSA affects driver mood. Last year we were pleased to discover that drivers reported much-reduced levels of stress, frustration and tiredness after their visit. This year drivers have reported even greater improvements. This is testament to the effective job that MSAs are doing in fulfilling a vital road safety function.

Among the 9600 visitors we spoke to satisfaction is high at 92 per cent – a result for the industry to be proud of. People that drive for a living are slightly less satisfied at 88 per cent.

Some MSAs have seen significantly increased visitor satisfaction following improvement works

that have been carried out over the past year. We welcome this continued investment in improving customer experience.

The survey also highlights some areas where further improvement is desirable and shows where there are differences between the MSA operators. We know from last year's survey that the findings of this research will be used by the operators to make a real difference to the experience of road users stopping at MSAs.

Transport Focus will continue to work with the industry and hopes to repeat this survey annually. We are also exploring satisfaction with the provision of services on Highways England's 'A' roads and will be publishing those findings later this year.

Jeff Halliwell
Chair

Summary

We wanted to understand what the experience at each motorway service area is like for road users and, importantly, to track it over time. This study also explores the areas that perform particularly well and highlights the aspects that could be improved.

92 per cent of people tell us they are satisfied (compared to 90 per cent in 2017) and 62 per cent of visitors say they are very satisfied. These high ratings confirm that, for most people, the customer experience at the MSA is a very good one.

Those who drive for a living are not quite as satisfied at 88 per cent – but this has increased significantly from 84 per cent in 2017. These professional drivers have seen the biggest year-on-year improvement of any visitor group.

Visitors with a disability report high levels of satisfaction at 90 per cent. However only 70 per cent thought the MSA catered well for their disability, indicating potential to improve the experience of disabled visitors.

Probably the most important function of the MSA is that it offers the right environment for people to rest and recharge before continuing to drive. This study shows that after a visit to the MSA there is a significant and welcome decrease in people feeling tired, stressed and frustrated.

We know that a visit to the MSA is mainly about fulfilling basic, functional needs. People stop because they want to use the toilet, get something to eat and drink and take a break from driving. Looking at how the MSAs perform in these key areas is therefore particularly important.

Buying food and drink to eat in the MSA is rated highly.

People are generally happy with the choice of food on offer, the friendly staff who provide quick service, the clean tables to sit at and the quality of the food and drink. Most people said they felt the introduction of well-known brands to MSAs has made the standard better.

Customers tend to be less satisfied with value for money at MSAs. While value for money of food and drink is rated less well than other factors at 66 per cent (up from 64 per cent last year), fuel is the area that causes more frustration. More than half of visitors find it annoying that fuel costs more at MSAs. There is a challenge for the industry to allow people to feel that their purchases and overall experience at the MSA are worth the money they are spending.

Toilets are rated highly for cleanliness and the number available, but the quality of fixtures scores somewhat lower. There are also significant differences between the operators across these factors; there is clearly still some work to be done here to achieve a consistent, high standard.

The impression of the building is important to customers and tends to rate slightly lower than other areas. This is one of the areas that visitors suggested could be improved at some locations, mentioning the need for better maintenance or a refurbishment. However, there were also plenty of comments noting and appreciating where improvement works had been carried out and new facilities provided. Investment is recognised and welcomed by the MSA visitors.

We have shared these results with all the MSA operators, Highways England and the Department for Transport.

Clear improvement in visitors' mood



25% increase in visitors who feel happy and relaxed after their visit



19% decrease in visitors who feel tired, stressed or frustrated after their visit

Motorway Services User Survey 2018

111 motorway services rated by over **9600** road users in our survey

ARRIVAL

92% rate vehicle **safety** in the car park as **good**

PLANNING

45% of drivers **plan beforehand** to stop at a particular motorway services

USAGE

77% rate the **road surfaces** at the motorway services as **good**

80% rate the **outside of the building** as **good**

73% of visitors **use the toilets**

52% sit down to have **food or drinks** they buy in the motorway services

55% **decide on route** which motorway services to stop at

OVERALL

92% of visitors are **satisfied with their experience** at the motorway services

MOOD

19% Fewer visitors feel **tired, stressed** or **frustrated** after their visit

25% uplift in visitors who feel **happy** or **relaxed** after their visit

RATINGS

66% say they **would definitely stop** at the same motorway services **again**

91% rate the **quality of the food and drink** as **good**

89% rate the **cleanliness of the toilets** as **good**

66% rate the **value for money** of the food or drink they had as **good**

Key findings

Overall satisfaction

Visitor satisfaction at motorway service areas remains very high. 92 per cent said they were satisfied, a slight increase from the previous year when satisfaction was 90 per cent. 62 per cent of visitors said they were very satisfied with their experience. Dissatisfaction remains extremely low, at just three per cent.

The six per cent of MSA visitors with a disability were almost as satisfied with their experience at 90 per cent. However, 70 per cent thought the MSA catered well for their disability; this is down from 82 per cent last year.

Professional drivers visiting MSAs are still the least satisfied at 88 per cent. However, this has risen from 84 per cent in 2017 and is the largest increase in satisfaction of any visitor group.

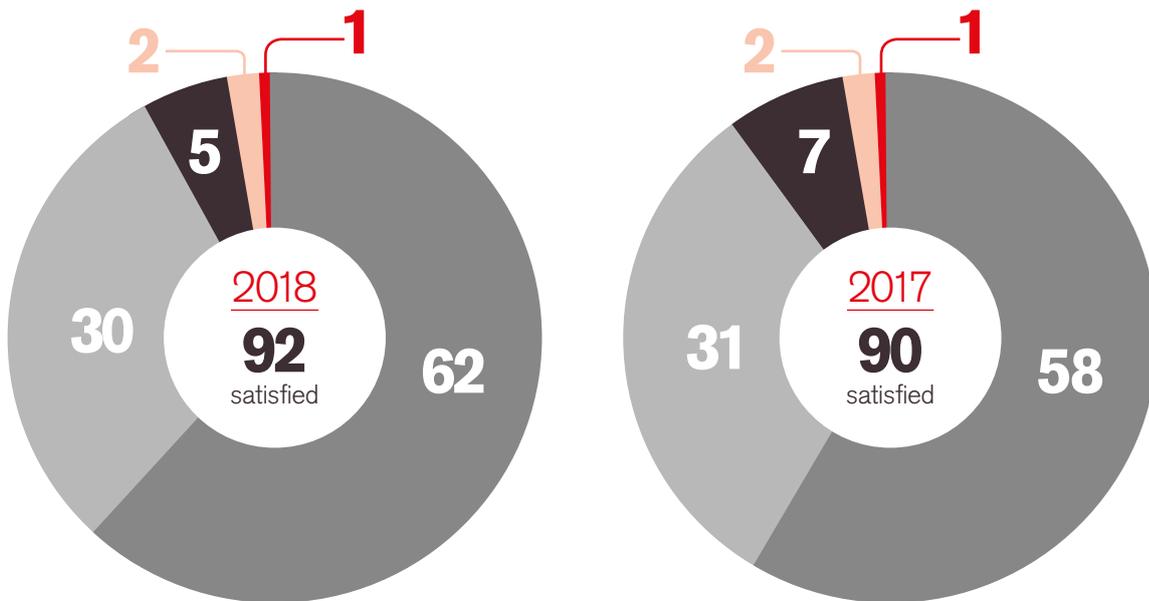
Satisfaction across the individual operators is high, ranging from 90 per cent to 97 per cent. Euro Garages and Westmorland have the highest levels of satisfaction, both at 97 per cent. Roadchef has seen the biggest year-on-year increase from 89 per cent in 2017 to 93 per cent in 2018.

At the 111 individual MSAs satisfaction ranged from



68 per cent to 100 per cent. Almost three-quarters of the MSAs had satisfaction ratings of 90 per cent or above. Fifteen sites have had significant increases in satisfaction since the previous year. The biggest increases were at Stafford Southbound (up from 70 per cent to 99 per cent) and Heston Eastbound (up from 62 per cent to 88 per cent). Four MSAs have had significant decreases in satisfaction since 2017.

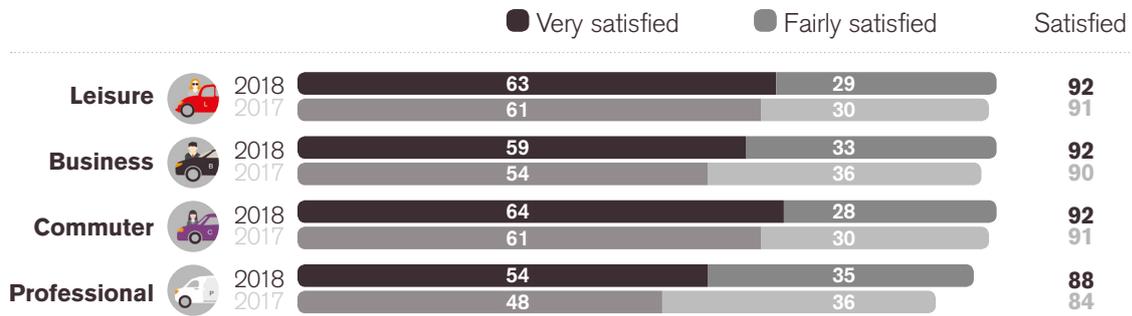
1 Overall satisfaction (%)



Very satisfied
 Fairly satisfied
 Neither/nor
 Fairly dissatisfied
 Very dissatisfied

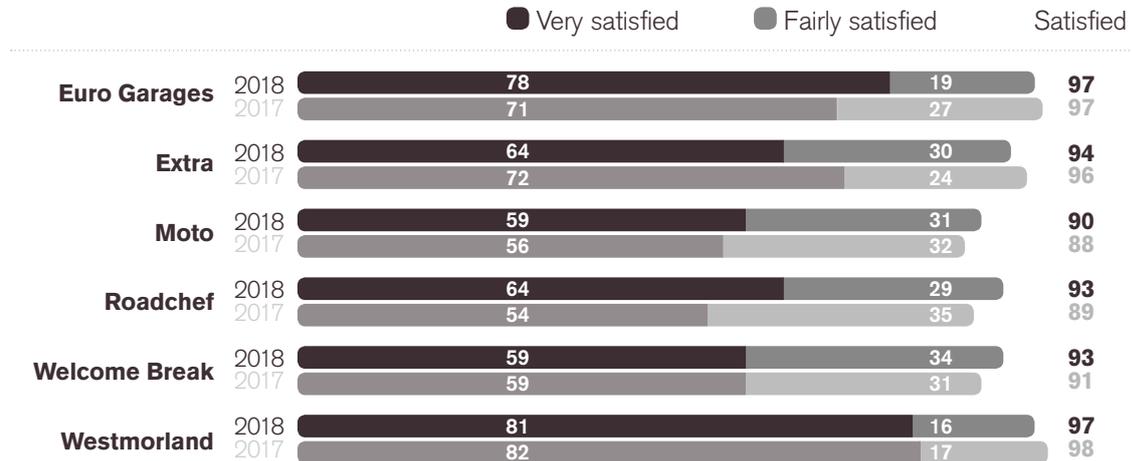
Base (2018/2017): all MSA visitors (9626/8701)

2 Overall satisfaction by MSA visitor type (%)

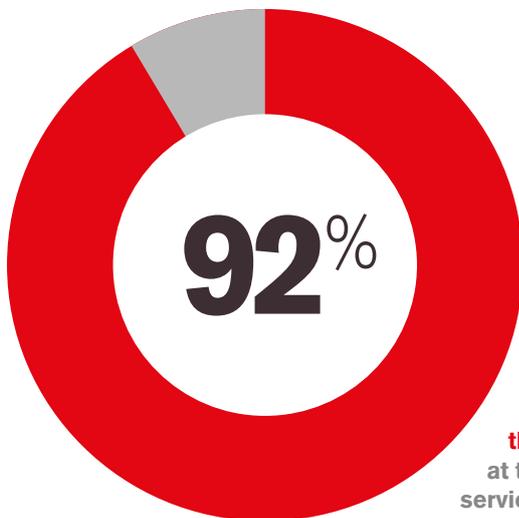


Base (2018/2017): all MSA visitors (9626/8701), Leisure (6261/5600), Business (1749/1536), Commuter (634/617), Professional (982/948)

3 Overall satisfaction by MSA operator (%)



Base (2018/2017): all MSA visitors (9626/8701), Euro Garages (176/150), Extra (516/453), Moto (3901/3502), Roadchef (2006/1787), Welcome Break (2667/2391), Westmorland (360/340). Number of sites each MSA operator runs: Euro Garages (2), Extra (6), Moto (45), Roadchef (23), Welcome Break (31), Westmorland (4)



92% of visitors were satisfied with their experience at the motorway service area

"Overall the quality of the service at this station is impeccable. It is always a pleasure to come here."

leisure user

"I like the convenience of it. It's a small enough area for me as a disabled person."

leisure user

Arrival at motorway service areas

Visitors rated the various aspects of the MSA that they saw or used as they arrived. The clarity of approach signs, vehicle safety and the walk from the vehicle to the building all rate highly with at least nine in ten visitors describing them as very or fairly good. The

layout of the car park and the impression of the building rate slightly less well, although at least eight in ten still describe them as good. There was very little change in the rating of any of these aspects compared to the previous year.

4 How visitors rated the MSA upon arrival (%)



Approach signs

60 very good
31 fairly good

90 good



Slip road

57 very good
31 fairly good

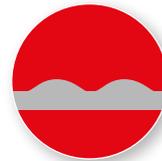
88 good



Car park layout

51 very good
34 fairly good

85 good



Road surfaces in MSA

40 very good
37 fairly good

77 good



Feeling of safety leaving vehicle

58 very good
34 fairly good

92 good



Walk from vehicle to building

61 very good
32 fairly good

93 good



Impression of building outside

45 very good
36 fairly good

80 good



Impression of building inside

46 very good
37 fairly good

83 good

Base: all MSA visitors (9626)

"It's a bit confusing where to go when you come in the car park. Confusing which is for trucks and which is for cars."

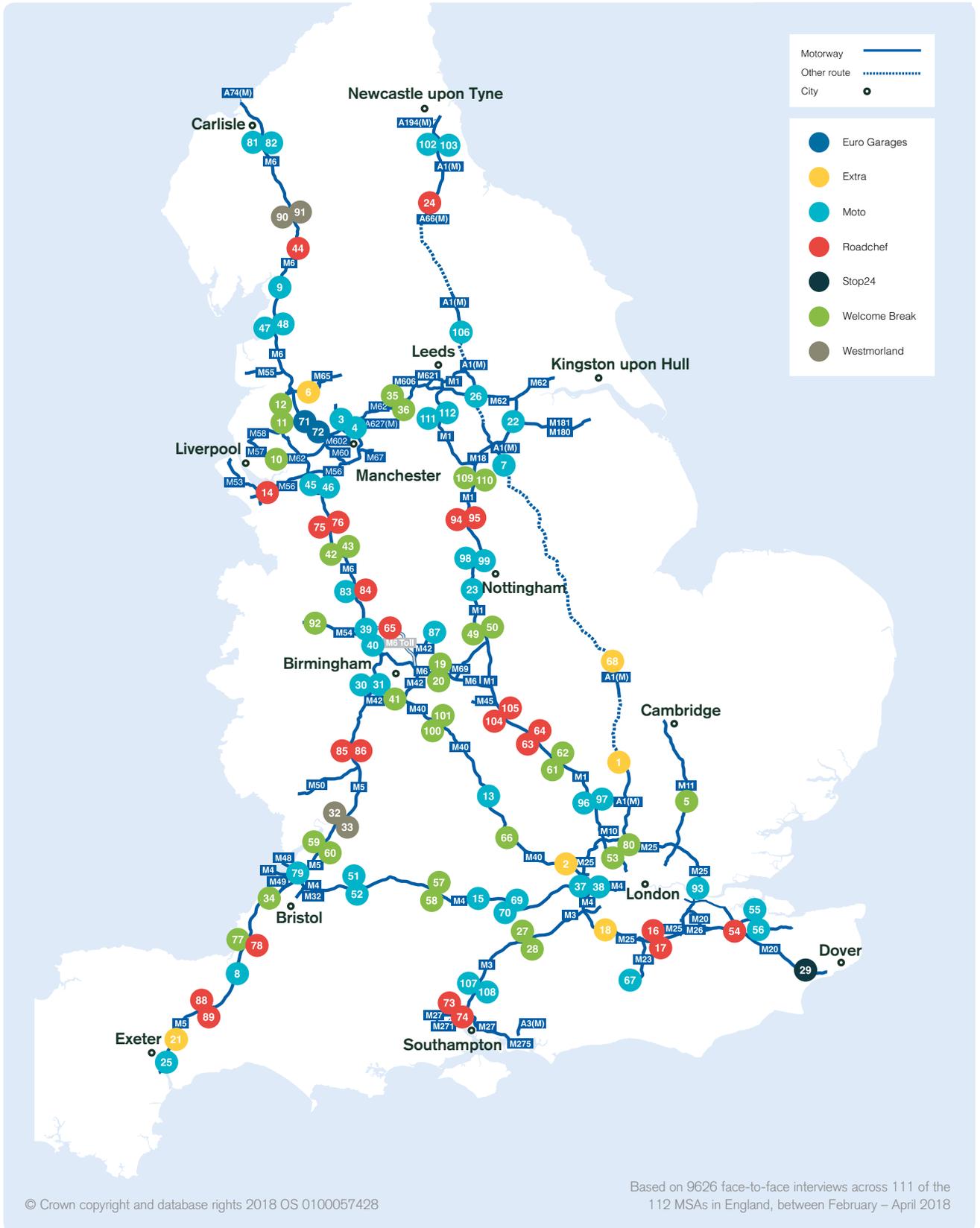
leisure user

"Walkway from HGV parking doesn't feel safe. Have to dodge the traffic."

professional user



Overall satisfaction by motorway service area



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

* Folkestone Services operated by Stop24 chose not to participate in the 2018 survey

Facilities in the motorway service area

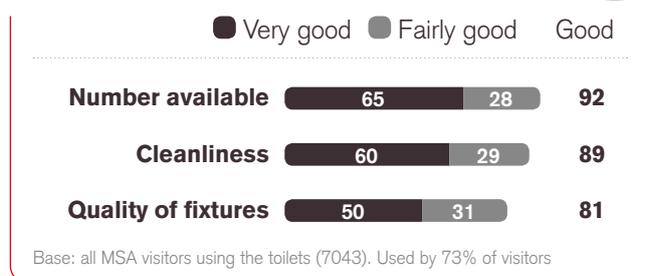
Almost three quarters of MSA visitors used the toilets during their visit. The number available rated highly at 92 per cent while their cleanliness also rated positively at 89 per cent. The quality of toilet fixtures rated lowest at 81 per cent. There were some variations across individual operators; for toilet cleanliness the range was 77 per cent to 96 per cent, while for quality of the fixtures it varied from 75 per cent to 95 per cent. Westmorland had the highest ratings of any operator for toilets.

The second most common activity was buying food and drink to eat in the MSA, with half of visitors doing this. Ratings for this area tended to be very high; amount of seating, cleanliness of tables, friendliness

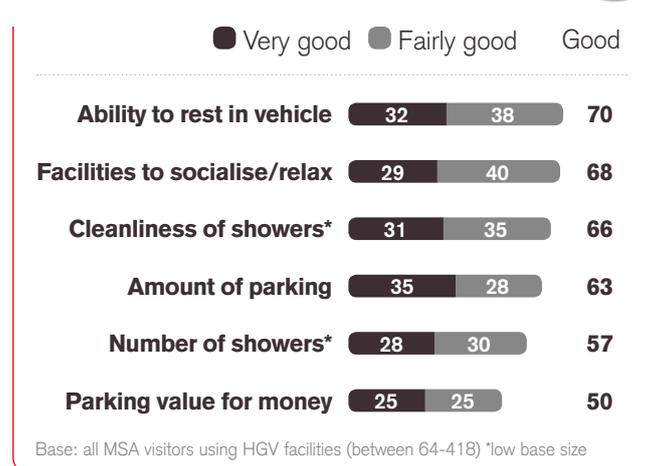
of the staff, speed of service and the quality of the food and drink were all rated as good by at least 90 per cent of customers. The range of the food and drink on offer rates slightly less well, with 87 per cent saying it was good. Value for money was rated the lowest of these factors with 66 per cent describing it as good; this was up from 64 per cent in the previous year.

HGV drivers tended to give lower ratings to the facilities that are provided primarily for them. The highest rated of these aspects was the ability to rest in their vehicle (70 per cent) while the lowest was the value for money of the parking package (50 per cent). However, this value for money rating has improved slightly from the previous year when 47 per cent rated it as good.

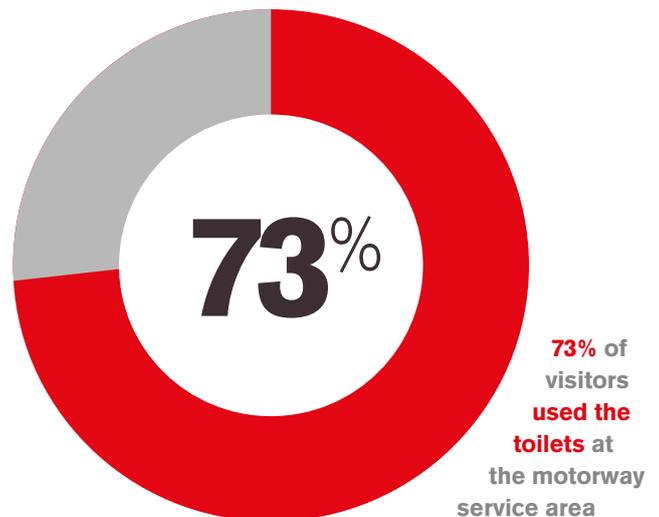
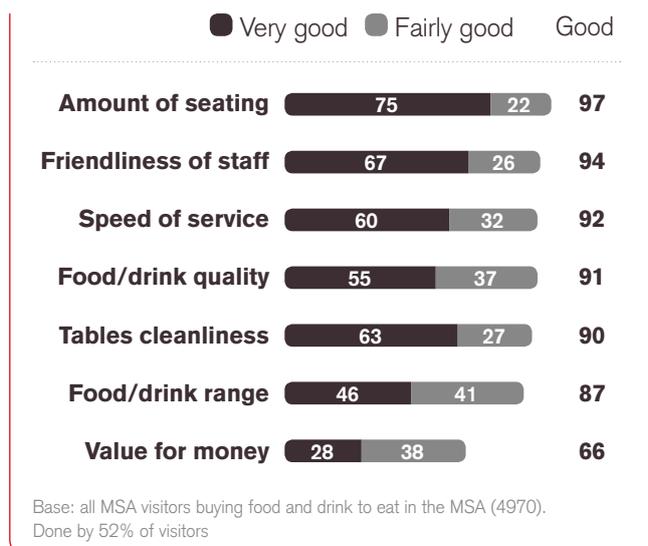
5 How visitors rated the toilets (%)



7 How visitors rated the HGV facilities (%)



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



Attitudes to motorway service areas in general

We asked a range of questions to explore people's attitudes to motorway service areas in general. The majority think the standard of some MSAs is definitely better than others. Introducing well-known brands in recent years is widely

considered to have made MSAs better. A third of visitors were more inclined to stop at a specific MSA because of one of the brands on offer there.

8 Visitors' attitudes to MSAs in general



Stopping at motorway services is...



The standard of motorway services...



How focused are you which motorway services you stop at...



Introducing well-known brands in recent years has made motorway services...



Fuel costing more at motorway services...



Base: all MSA visitors (9626)

"I don't buy fuel at motorway services. They're always too expensive."

leisure user

"It's always very clean and welcoming here."

commuter

"Introduce dairy-free food and a gluten-free range."

leisure user

"Need to cater more for women lorry drivers. Some services don't have showers for women."

professional user

"Staff very friendly, very fast in serving customers. I'll definitely be back again."

leisure user

"Value for money overall needs to be looked at. It's way too expensive."

business user



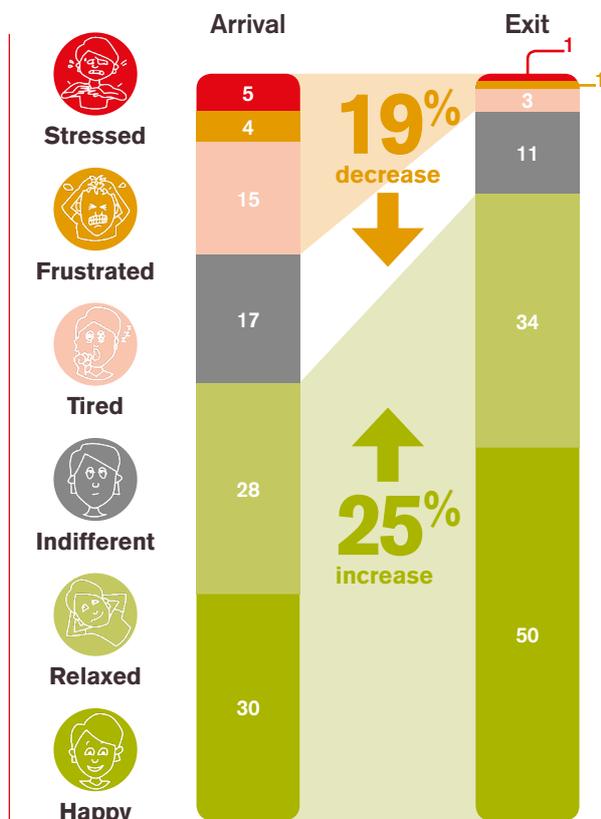
The impact a motorway service area visit has on mood

We asked visitors to tell us about their mood when they arrived at the MSA and then how they felt after their visit. One in four visitors arrived in a negative mood, feeling

tired, stressed or frustrated. Their MSA visits proved to significantly reduce these negative moods with only one in 20 visitors reporting feeling tired, stressed or frustrated when they left the MSA. People making longer journeys were even more likely to feel tired, stressed or frustrated on arrival; 30 per cent of those on the road at least three hours, compared to 20 per cent of those on the road up to an hour. Their visit to the MSA reduced these negative moods to the same low level irrespective of the length of the journey.

We saw a corresponding increase in visitors reporting they felt happy or relaxed after their visit. 84 per cent left in a positive mood compared to 59 per cent upon arrival, an uplift of 25 percentage points. This is higher than last year's uplift of 20 percentage points.

9 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 (9626)

"Nice place to relax and take a break from driving."

business user

"I always enjoy stopping at these services as it's got a nice atmosphere."

leisure user

"Outdoor seating is good and there's a nice view."

leisure user

Improving the motorway service area experience

Visitors suggested some areas they might like to see improved. One of the themes for improvement was the motorway service area buildings, with suggestions that some would benefit from updating or better maintenance. But there were also many positive comments about buildings that had been improved or where new facilities were offered.

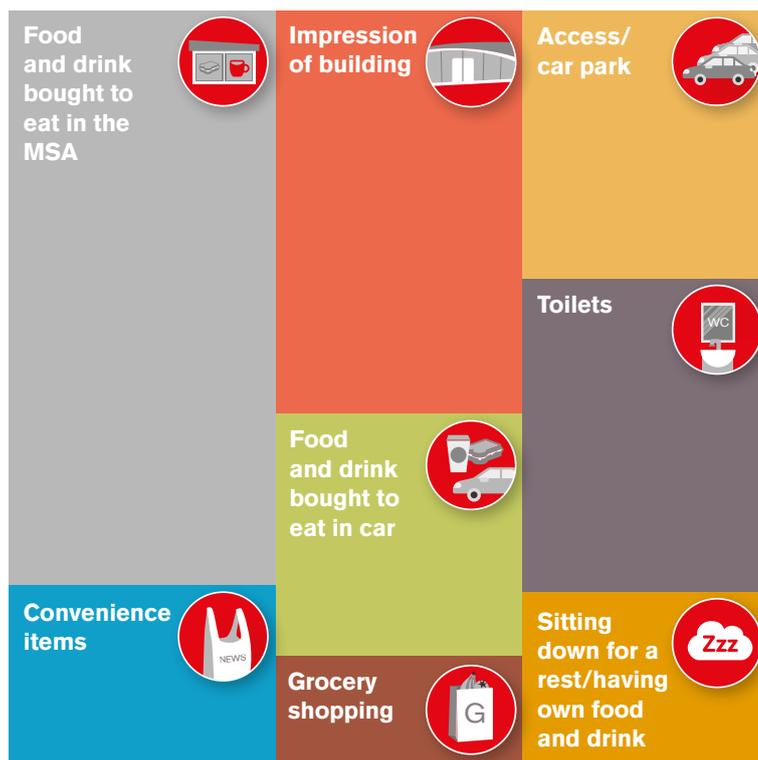
Offering a wider range of food was another common suggestion. Although satisfaction with this area is high, some visitors mentioned they would like to see more choice; suggestions included more 'free-from' type foods suitable for allergy sufferers or vegans. There was also a desire for better value for money across the range of

goods on offer at MSAs including fuel, and food and drink.

We also used statistical analysis to see which experiences at MSAs have more influence on visitors' overall satisfaction levels. Food and drink bought to eat in the MSA is the key factor in creating a satisfactory experience. The range and quality of the food on offer are the most influential factors; how helpful the staff are, how quick the service is, and value for money are also important. The impression of the building both inside and outside and the toilets are also important influencers of satisfaction. HGV drivers are also influenced by the value for money of the parking package, facilities to relax and socialise and the safety of their vehicle.

10 What influences satisfaction with MSAs

The size of the boxes in this chart represent the relative impact the various aspects of the experiences at the MSA have on overall satisfaction.



"Looks scruffy inside and out. Exterior of building looks dirty. Fixtures and fittings in the food area look worn. Broken latches, out of service cubicles and driers in the gents."

leisure user

"Toilet too far from main entrance, especially for disabled person."

business user

Profile of visitors

Who visits motorway service areas

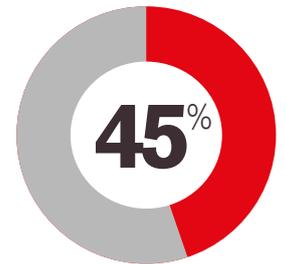
Two thirds of the MSA visitors we spoke to were travelling for leisure reasons. Travelling on business was the next most common purpose at 18 per cent. Other visitors were professionals who drive for a living (10 per cent) and

commuters (seven per cent). Leisure visitors were evenly split between men and women but all other groups had a much higher proportion of men. This was especially true for professionals with 97 per cent being men.

11 Who visits MSAs (%)

| | All visitors (%) | Leisure | Business | Commuter | Professional |
|------------|------------------|---------|----------|----------|--------------|
| Male | 61 | 49 | 77 | 73 | 97 |
| Female | 39 | 51 | 23 | 27 | 3 |
| 18-34 | 21 | 20 | 21 | 36 | 16 |
| 35-54 | 38 | 33 | 47 | 43 | 51 |
| 55+ | 41 | 47 | 32 | 21 | 33 |
| Disability | 6 | 8 | 2 | 3 | 2 |

Base: All MSA visitors (9626), Leisure (6261), Business (1749), Commuter (634), Professional (982)



45% of visitors planned in advance to stop at a particular motorway service area

Journey time and length of break

Typically, people drove for about an hour and a half before stopping to take a 20-minute break. Commuters had the shortest journey times before stopping – an average of one hour. Professionals were on the road for longer before stopping – an average of two and a half hours. They also tended to have a longer break than other visitors, taking an average of 30 minutes.

Planning to stop

Less than half of visitors (45 per cent) planned which particular MSA to stop at before setting off, with the rest deciding while they were on their journey. However, there were differences between operators – the range of those who planned is from 41 per cent to 75 per cent. Westmorland visitors were the most likely to have planned to stop there before they set off.

How often they visit

Half of visitors told us that it was either the first time they had visited that particular MSA or that they only stop there occasionally. One in five people stop at the same MSA at least every two weeks. This is much higher among professional drivers with half of them stopping at the same services at least every two weeks.

Reasons for visiting

The main reasons people stopped at the services are to get something to eat or drink, use the toilet and take a break from driving.

Visiting the MSA in future

95 per cent of visitors said they would be likely to visit the same MSA in future, with 66 per cent saying they definitely would. A third of visitors would be more likely to choose the same MSA again, rather than another one nearby, as a result of their experience.



Survey method

We interviewed 9626 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 111 of England's 112 MSAs*.

At each MSA there were four six-hour interview shifts and one three-hour shift, split 60/40 across weekdays and weekends. Interviews were spread across different times of the day to cover a wide range of visitors.

Responses from each MSA counted equally towards the overall results. When we quote an all MSA or all visitor average this includes results from all six operators involved in the survey. We also show some individual results for each of these operators.

Transport Focus was supported by Populus, an independent accredited research and strategy consultancy, in conducting this research. We carried out the fieldwork between February and April 2018, the same time as the survey was carried out last year.

*Folkestone Services operated by Stop24 chose not to participate in the 2018 survey

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 to them and supports DfT in managing its 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 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 |
|---------------|-----------------|
| Euro Garages | 2 |
| Extra | 6 |
| Moto | 45 |
| Roadchef | 23 |
| Stop24 | 1 |
| Welcome Break | 31 |
| Westmorland | 4 |

Contact Transport Focus

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name of the Passengers' Council