Overall report

August 2019

Motorway Services User Survey 2019

BVA BDRC

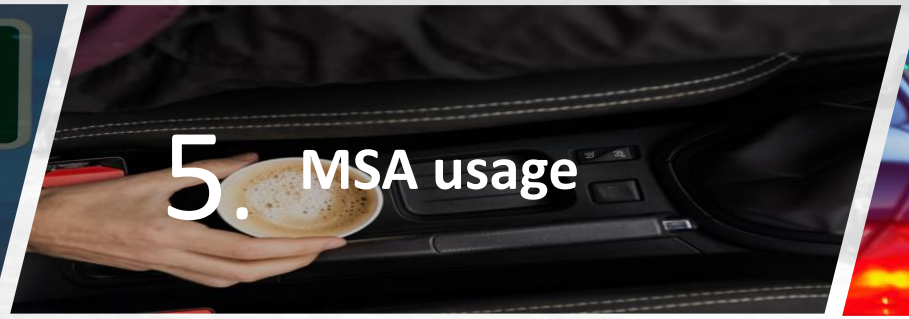
transportfocus

1. Background and approach

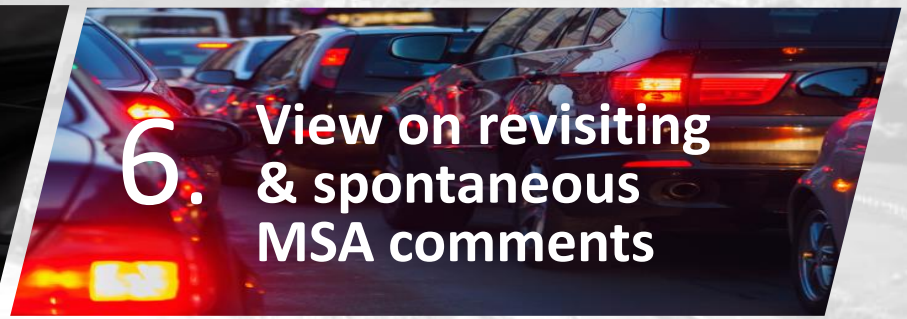
2. Usage patterns

3. Overall experience

4. Reasons for visiting

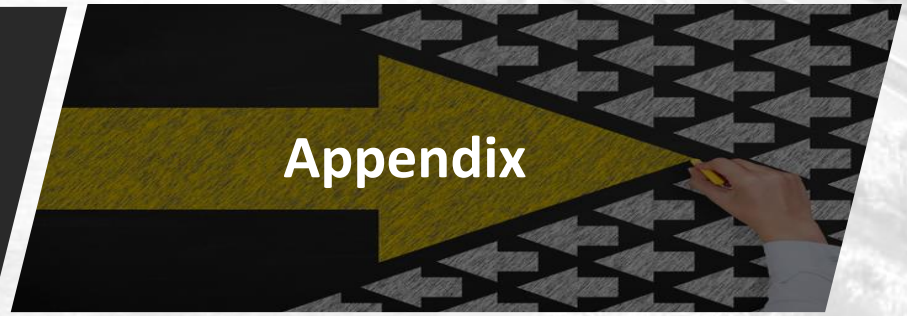


5. MSA usage



6. View on revisiting & spontaneous MSA comments

Appendix



Background

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

As part of its work, Transport Focus has been tracking how well Motorway Service Areas (MSAs) are meeting the needs of different SRN user groups. For the 3rd year of the project, Transport Focus engaged BVA BDRC to conduct the survey of user satisfaction with MSAs.

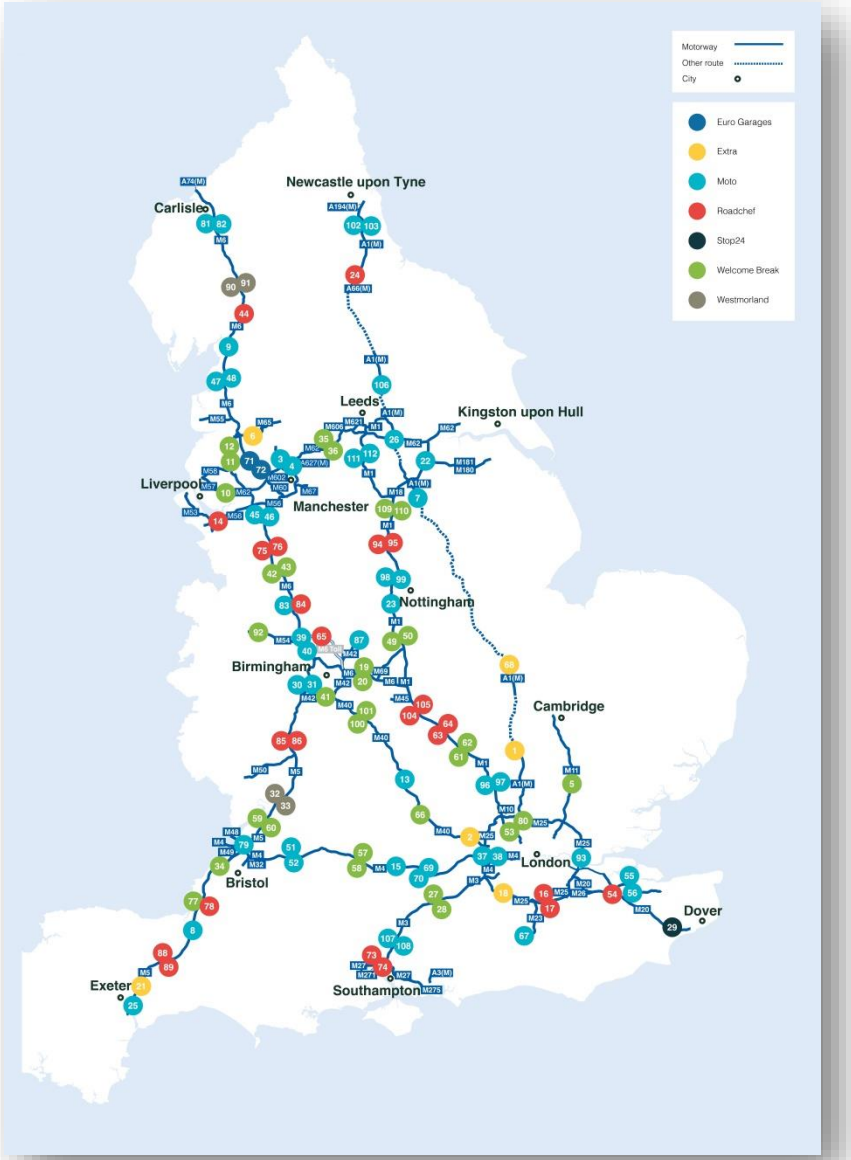
Specific objectives for 2019 included:

Consistently and robustly measure user satisfaction across All MSAs

Understand the effect visiting an MSA has on visitor temperament

Identify the key drivers of satisfaction and intention to revisit

Project approach/ methodology



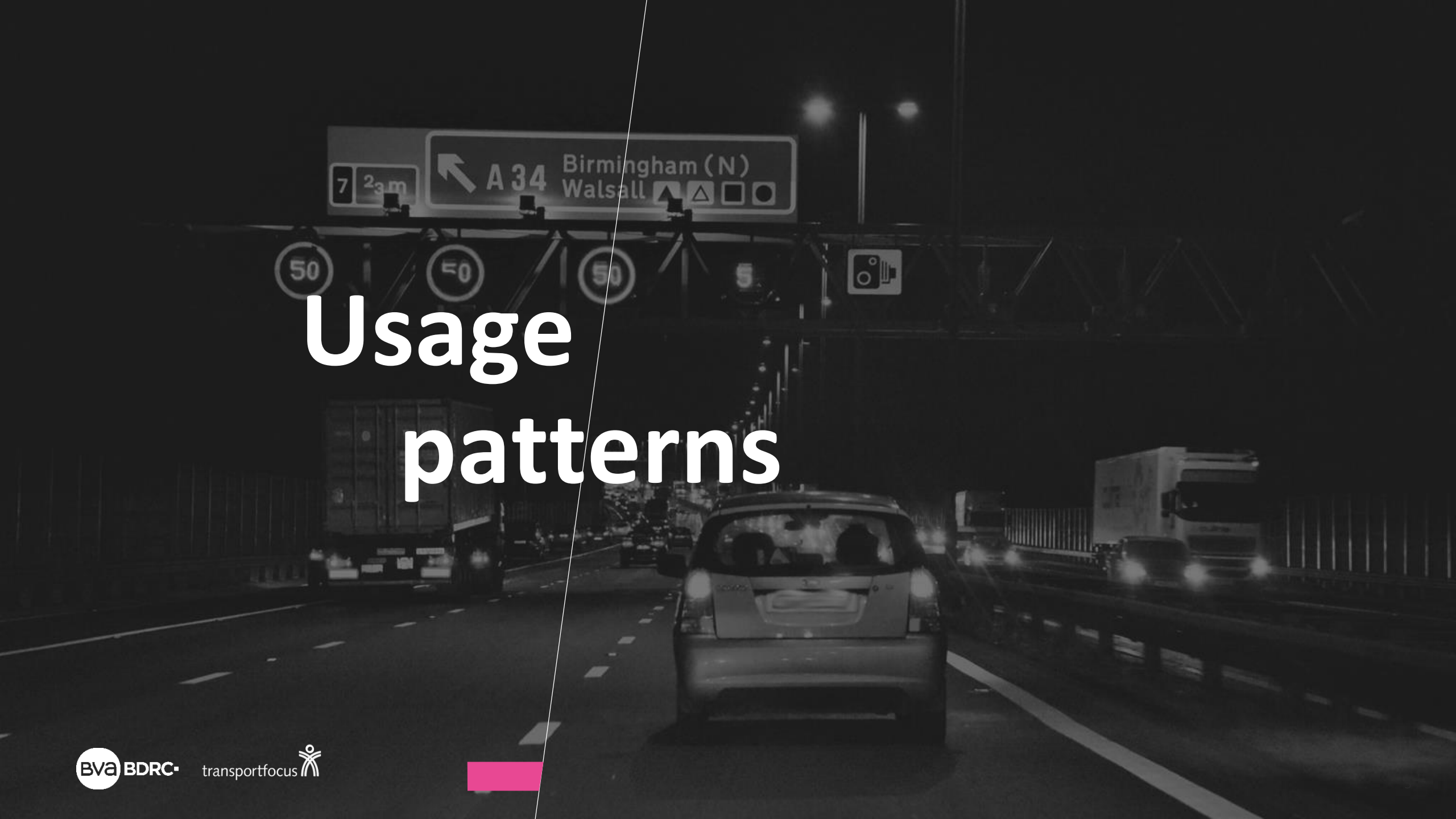
Overall, interviews took place at 111 out of the 112 MSAs in England (Stop 24 not participating), achieving 11,609 responses across 6 different operators: Extra, Roadchef, Welcome Break, Moto, Westmorland and Euro Garages.

Tablet devices were used to interview visitors upon exit, to achieve in-the-moment recollections of their experience.

- **2019 fieldwork – 8th Feb to 17th April**
- **2018 fieldwork – 12th Feb to 12th April**
- **2017 fieldwork – 13th Feb to 9th April**

Six six-hour interview shifts were completed at each individual MSA in 2019; four weekday and two at weekends.

Individual MSAs are equally weighted within the data, meaning each site counts equally towards overall results.



Usage patterns

Respondent profile

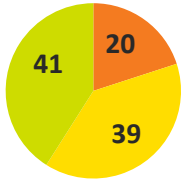
Visitor type (%)

	Leisure	Business	Commuter	Professional*
All MSA average 2019	63	22	5	11
All MSA average 2018	65	18	7	10

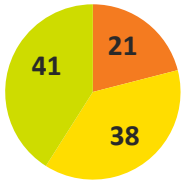
Gender (%)

Male		Female
63	**2019**	37
61	**2018**	39

Age (%)



2019

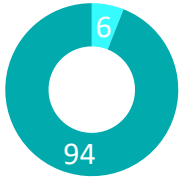


2018

18-34 35-54 55+

Disability (%)

2019



2018

Yes

No/prefer not to say

Vehicle type (%)

	2019	2018
Car	79	81
HGV/Truck	9	7
LCV	6	5
Coach	5	5
Other	1	1

Q1. Driver Type / Gender / Q24. Age / Q25. Disability /Q6. Vehicle type.

Base (2019/2018): All MSAs (11,609/9,626) Note disability base is 11,357/9,501. *Approximately 3 quarters of professionals are driving an HGV or truck

Respondent profile by visitor type

All MSAs average 2019 (%)	Leisure	Business	Commuter	Professional
Male	50	81	71	98
Female	50	19	29	2
18-34	20	20	40	16
35-54	32	49	42	53
55+	48	31	18	31
Disability	9	3	3	2

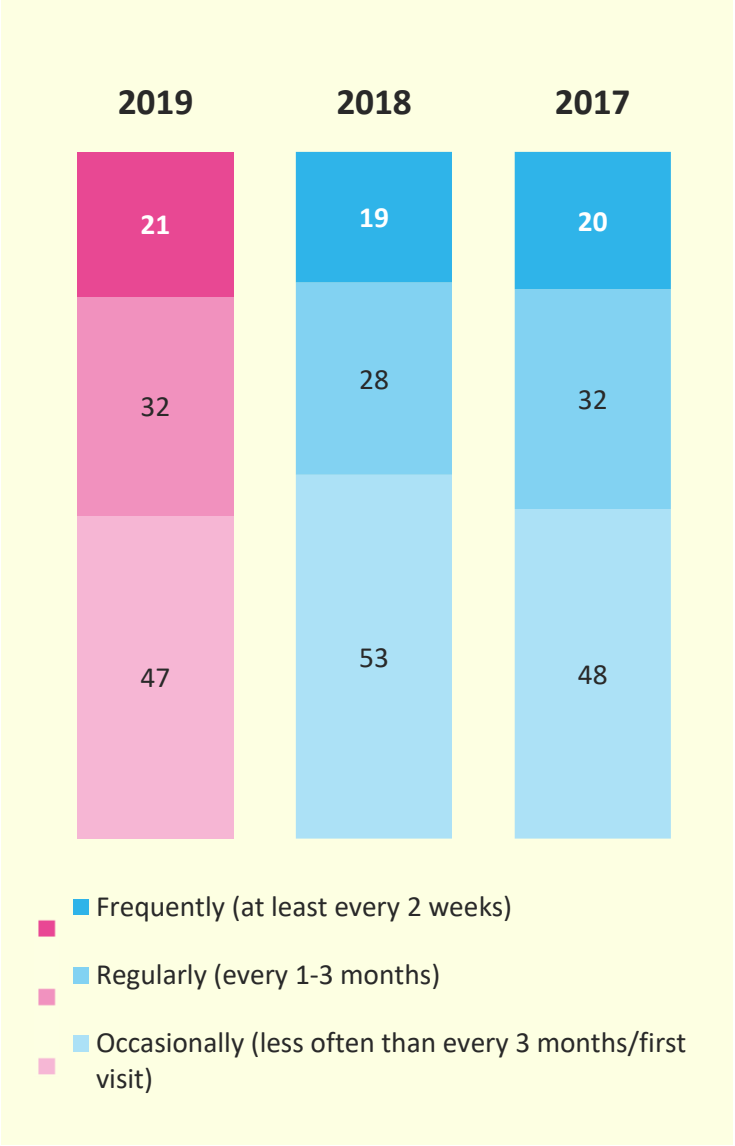
All MSAs average 2018 (%)	Leisure	Business	Commuter	Professional
Male	49	77	73	97
Female	51	23	27	3
18-34	20	21	36	16
35-54	33	47	43	51
55+	47	32	21	33
Disability	8	2	3	2

Q1. Your journey today, are you …./ code gender

Base: All MSAs (2019/2018), Leisure (7,275/6.261), Business (2,494/1,749), Commuter (586/634), Professional (1,254/982). Note base size for age and disability slightly lower as around 2% said prefer not to say to each question.

Frequency of visiting this MSA (1)

All MSAs



Operator comparison (%)

Euro Garages	2019	39	30	31
	2018	40	34	25
	2017	41	35	24
EXTRA	2019	31	35	33
	2018	42	30	28
	2017	33	34	34
moto	2019	48	31	22
	2018	52	26	21
	2017	48	32	20
roadchef	2019	49	33	18
	2018	55	28	17
	2017	51	30	19
WELCOMEBREAK	2019	48	32	20
	2018	55	29	16
	2017	50	31	19
THE WESTMORLAND FAMILY	2019	42	47	12
	2018	51	35	14
	2017	49	39	12

Q23. Approximately, how often do you stop at…

Base (2019/2019/2017): All MSAs (11,609/9,626/8,701) Euro Garages (186/176/150), Extra (647/516/453), Moto (4,698/3,901/3,502), Roadchef (2,418/2,006/1,787), Welcome Break (3,194/2,697/2,391), Westmorland (466/360/340)

Frequency of visiting this MSA (2)

Visitor type (%)

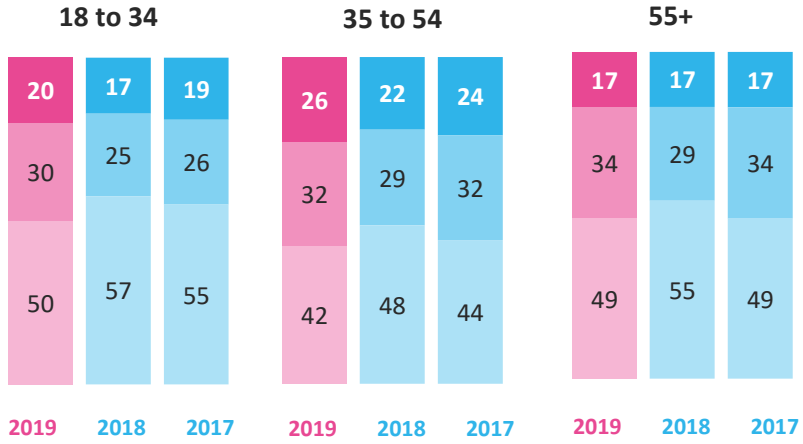
		Occasionally	Regularly	Frequently
Leisure	2019	57	33	10
	2018	63	28	9
	2017	57	32	10

		Occasionally	Regularly	Frequently
Business	2019	38	36	26
	2018	42	32	25
	2017	37	35	28

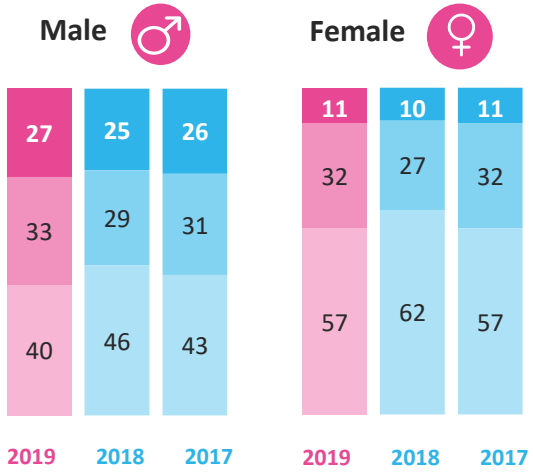
		Occasionally	Regularly	Frequently
Commuter	2019	25	25	50
	2018	30	29	41
	2017	36	28	36

		Occasionally	Regularly	Frequently
Professional	2019	14	25	61
	2018	22	23	54
	2017	20	25	55

Age (%)



Gender (%)

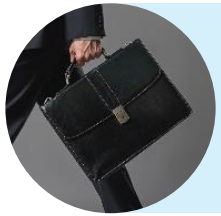


Occasionally Regularly Frequently

Q23. Approximately, how often to you stop at…

Base (2019/2018/2017) Visitor type: Leisure (7,275/6,261/5,600) Business (2,494/1,749/1,536) Commuter (586/634/617) Professional (1,254/982/948)
Age: 18 to 34 (2,341/2,014/1,897) 35-54 (4,456/3,628/3,442) 55+ (4,786/3,932/3,349) Gender: Male (7,315/5,831/5,396) Female (4,294/3,795/3,305)

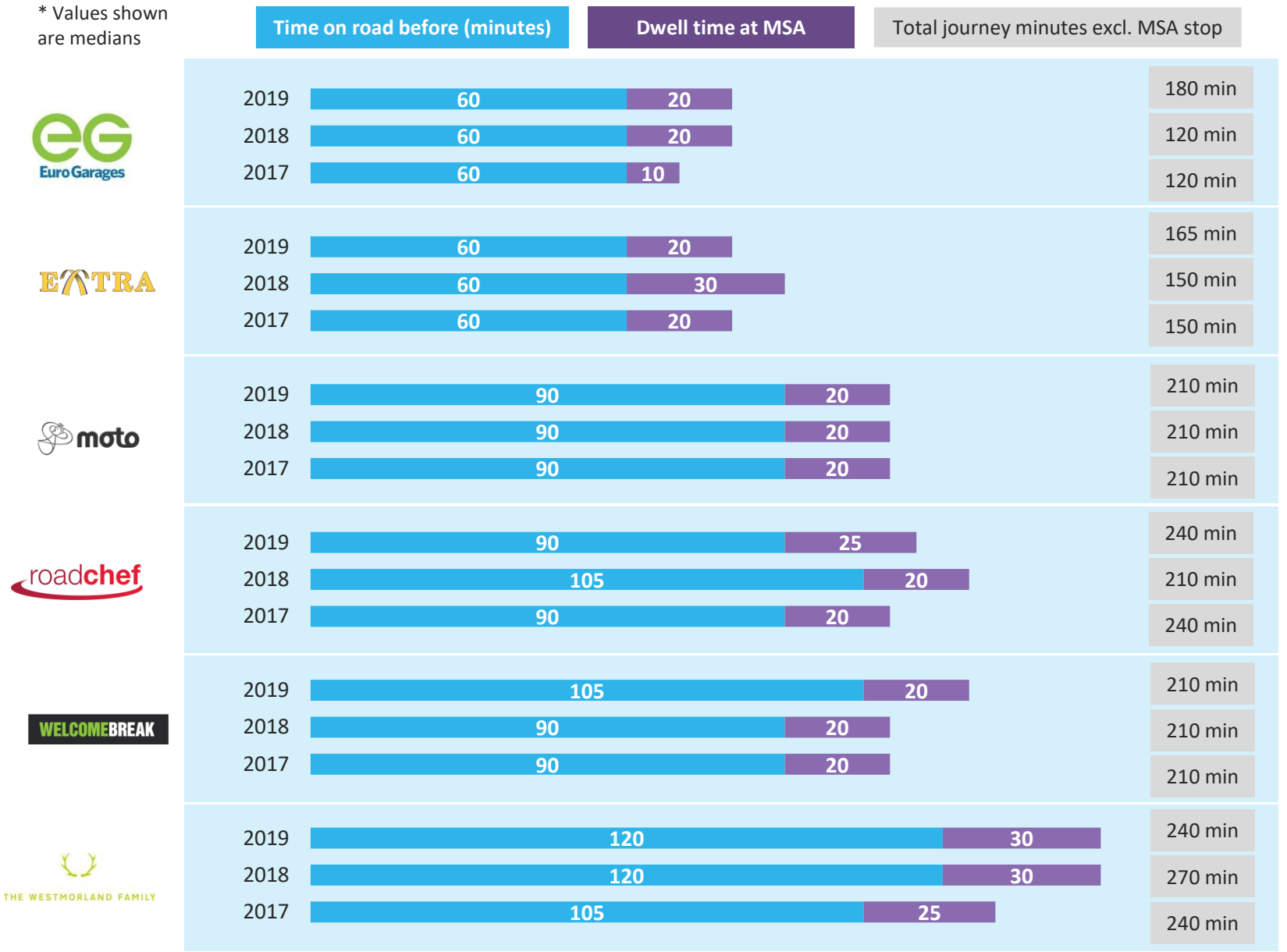
Typical journey length and dwell time

	Time on road before (minutes)	Dwell time at MSA	Total journey minutes excl. MSA stop
* Values shown are medians			
Overall 2019	90	20	210 min
2018	90	20	210 min
2017	90	20	210 min
Leisure 2019	90	20	210 min
2018	90	20	180 min
2017	90	20	180 min
 Business 2019	90	20	240 min
2018	90	20	195 min
2017	90	15	210 min
Commuter 2019	60	15	135 min
2018	60	20	150 min
2017	60	15	150 min
Professional 2019	165	30	480 min
2018	150	30	480 min
2017	150	30	420 min

Q3. How long is it since you set off, or last took a break from driving? (excluding the time spent here)/ Q5. How long have you spent here today, after parking?/Q2. How long will your whole journey today take (excluding the time spent here)?

Base (2019/2018/2017): Overall (11,609/9,626/8,701) Leisure (7,275/6,261/5,600) Business (2,494/1,749/1,536) Commuter (586/624/617) Professional (1,254/982/948)

Typical journey length and dwell time (2)



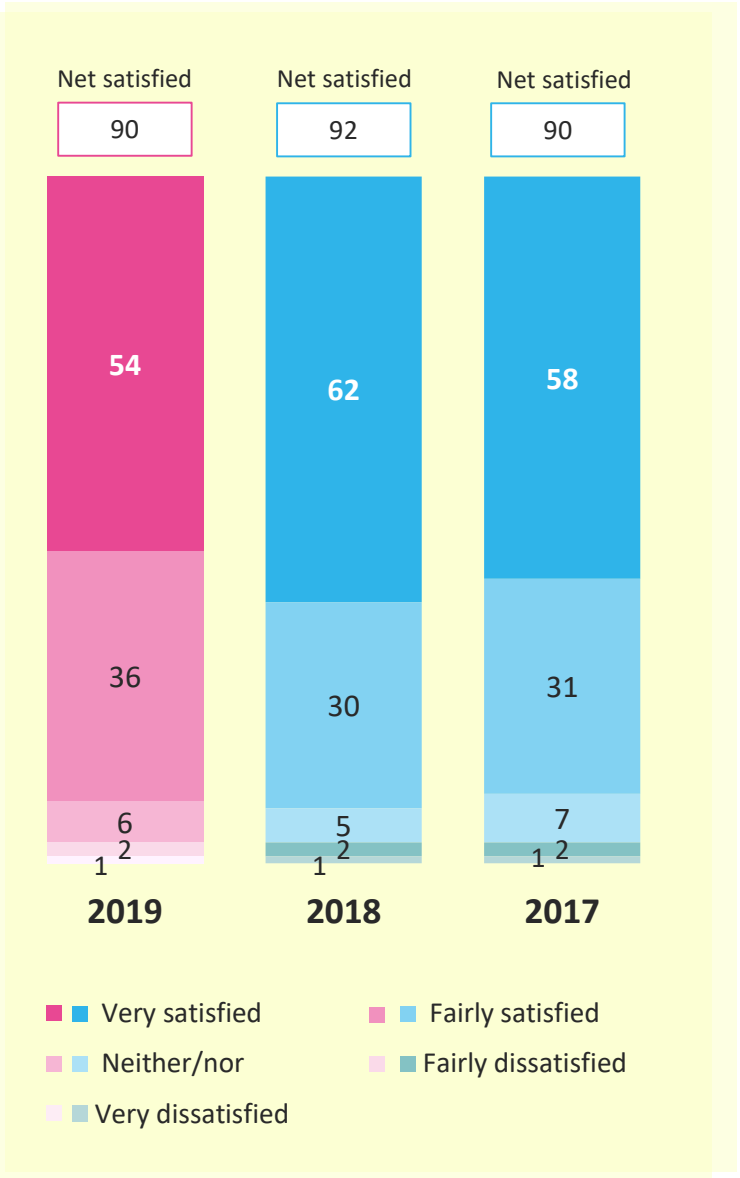
Q3.How long is it since you set off, or last took a break from driving? (excluding the time spent here)/ Q5. How long have you spent here today, after parking?/Q2. How long will your whole journey today take (excluding the time spent here)?

Base (2019, 2018, 2017): Euro Garages (186/176/150), Extra (647/516/453), Moto (4,698/3,901/3,502), Roadchef (2,418/2,006/1,787), Welcome Break (3,194/2,667/2,391), Westmorland (466/360/340)

Overall experience

Overall satisfaction (1)

All MSAs (%)



Operator comparison (%)

				Net satisfied
Euro Garages	2019	47	38	86
	2018	19	78	97
	2017	27	71	97
Extra	2019	36	53	89
	2018	30	64	94
	2017	24	72	96
moto	2019	37	53	90
	2018	31	59	90
	2017	32	56	88
roadchef	2019	34	58	92
	2018	29	64	93
	2017	35	54	89
Welcome Break	2019	38	52	90
	2018	34	59	93
	2017	31	59	91
The Westmorland Family	2019	12	86	98
	2018	16	81	97
	2017	17	82	98

Q7. Overall, how satisfied are you with your experience at these Motorway Services today?

Base (2019, 2018, 2017): Euro Garages (186/176/150), Extra (643/516/453), Moto (4,698/3,895/3,498), Roadchef (2,416/2,004/1,785), Welcome Break (3,194/2,662/2,388), Westmorland (466/360/340)

Overall satisfaction (2)

Visitor type (%)

		Fairly satisfied	Very satisfied	% satisfied
Leisure	2019	36	55	91
	2018	29	63	92
	2017	30	61	91

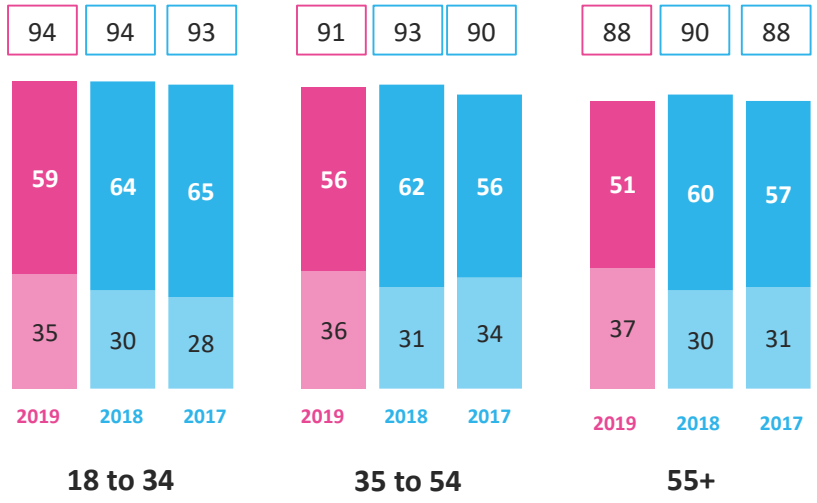
		Fairly satisfied	Very satisfied	% satisfied
Business	2019	35	56	91
	2018	33	59	92
	2017	36	54	90

		Fairly satisfied	Very satisfied	% satisfied
Commuter	2019	33	61	94
	2018	28	64	92
	2017	30	61	91

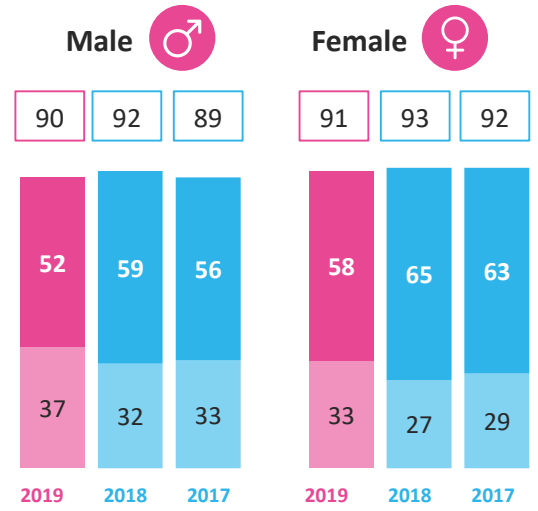
		Fairly satisfied	Very satisfied	% satisfied
Professional	2019	41	43	83
	2018	35	54	88
	2017	36	48	84

		Fairly satisfied	Very satisfied	% satisfied
HGV	2019	41	41	82
	2018	37	50	86
	2017	37	47	84

Age (%)



Gender (%)



Fairly satisfied Very satisfied % satisfied

Q7. Overall, how satisfied are you with your experience at these Motorway Services today?

Base (2019/2018/2017) Visitor type: Leisure (7,270/6,254/5,594) Business (2,494/1,745/1,534) Commuter (585/634/617) Professional (1,253/980/947). Age:18 to 34 (2,341/2,012/1,892) 35-54 (4,454/3,625/3,419) 55+ (4,781/3,924/3,348) Gender: Male (7,310/5,823/5,389) Female (4,292/3,790/3,303)

Overall satisfaction by individual MSA

Very/fairly satisfied (%)

Motorway service area	2019	2018	2017	Rank
Baldock	**93**	96	96	44
Beaconsfield	**91**	94	97	57
Birch EB	**84**	87	89	97
Birch WB	**88**	97	92	78
Birchanger Green	**95**	96	95	30
Blackburn with Darwen	**92**	94	96	50
Blyth	**80**	98	95	105
Bridgwater	**91**	81	79	53
Burton-in-Kendal	**86**	93	91	90
Burtonwood	**73**	83	89	110
Charnock Richard NB	**79**	93	91	106
Charnock Richard SB	**77**	92	89	107
Cherwell Valley	**95**	91	96	26
Chester	**91**	97	96	58
Chieveley	**97**	91	86	17
Clacket Lane EB	**85**	83	79	93
Clacket Lane WB	**96**	94	92	21
Cobham	**90**	91	97	64
Corley NB	**94**	98	99	36
Corley SB	**95**	99	93	33
Cullompton	**74**	93	97	109
Doncaster North	**94**	96	94	34
Donington Park	**86**	97	95	84

Very/fairly satisfied (%)

Motorway service area	2019	2018	2017	Rank
Durham	**93**	95	96	45
Exeter	**98**	92	84	11
Ferrybridge	**88**	87	90	75
Fleet NB	**91**	96	91	60
Fleet SB	**93**	98	90	41
Frankley NB	**90**	99	94	69
Frankley SB	**75**	91	95	108
Gloucester NB	**98**	94	99	7
Gloucester SB	**99**	97	99	3
Gordano	**86**	95	84	89
Hartshead Moor EB	**91**	92	91	54
Hartshead Moor WB	**92**	88	94	51
Heston EB	**97**	88	62	16
Heston WB	**99**	87	90	2
Hilton Park NB	**90**	93	96	62
Hilton Park SB	**98**	99	96	10
Hopwood Park	**96**	97	95	25
Keele NB	**93**	97	87	40
Keele SB	**86**	91	82	82
Killington Lake	**97**	99	90	19
Knutsford NB	**86**	94	85	88
Knutsford SB	**93**	98	99	48
Lancaster NB	**93**	90	82	47

Very/fairly satisfied (%)

Motorway service area	2019	2018	2017	Rank
Lancaster SB	**90**	87	90	68
Leicester Forest East NB	**85**	83	93	92
Leicester Forest East SB	**89**	91	95	72
Leigh Delamere EB	**88**	85	85	77
Leigh Delamere WB	**90**	91	86	67
London Gateway	**96**	96	91	20
Maidstone	**95**	87	91	29
Medway EB	**85**	85	87	94
Medway WB	**86**	97	84	87
Membury EB	**81**	95	77	104
Membury WB	**83**	95	88	101
Michaelwood NB	**98**	92	89	12
Michaelwood SB	**96**	96	93	22
Newport Pagnell NB	**88**	92	95	79
Newport Pagnell SB	**89**	81	89	73
Northampton NB	**94**	97	91	35
Northampton SB	**92**	97	94	49
Norton Canes	**99**	100	99	1
Oxford	**97**	88	87	13
Pease Pottage	**95**	99	93	27
Peterborough	**95**	97	94	31
Reading EB	**90**	89	96	65
Reading WB	**84**	89	100	96

Euro Garages Extra Moto Roadchef Welcome Break Westmorland

Q7. Overall, how satisfied are you with your experience at these Motorway Services today?

Overall satisfaction by individual MSA

Very/fairly satisfied (%)

Motorway service area	2019	2018	2017	Rank
Rivington NB	**84**	98	100	100
Rivington SB	**87**	97	95	81
Rownhams NB	**93**	93	76	46
Rownhams SB	**96**	87	75	24
Sandbach NB	**83**	98	89	102
Sandbach SB	**94**	90	84	37
Sedgemoor NB	**84**	93	86	95
Sedgemoor SB	**89**	95	93	70
Severn View	**72**	85	83	111
South Mimms	**99**	95	96	5
Southwaite NB	**81**	80	93	103
Southwaite SB	**84**	88	84	98
Stafford NB	**99**	94	90	4
Stafford SB	**98**	99	70	8
Strensham NB	**91**	93	89	56
Strensham SB	**91**	89	93	52
Tamworth	**89**	93	95	74
Taunton Deane NB	**93**	88	93	39
Taunton Deane SB	**93**	93	96	42
Tebay NB	**97**	99	98	15
Tebay SB	**97**	99	98	14

Very/fairly satisfied (%)

Motorway service area	2019	2018	2017	Rank
Telford	**91**	94	96	55
Thurrock	**93**	68	81	43
Tibshelf NB	**98**	93	94	9
Tibshelf SB	**86**	95	97	85
Toddington NB	**91**	82	86	59
Toddington SB	**89**	72	76	71
Trowell NB	**86**	91	91	83
Trowell SB	**95**	92	87	32
Warwick NB	**95**	87	90	28
Warwick SB	**96**	90	87	23
Washington NB	**86**	90	76	86
Washington SB	**90**	89	89	63
Watford Gap NB	**88**	90	93	80
Watford Gap SB	**84**	91	83	99
Wetherby	**97**	99	84	18
Winchester NB	**99**	93	84	6
Winchester SB	**90**	84	76	66
Woodall NB	**85**	93	92	91
Woodall SB	**90**	99	96	61
Woolley Edge NB	**88**	89	80	76
Woolley Edge SB	**93**	88	93	38

All MSAs

Very/fairly satisfied (%)

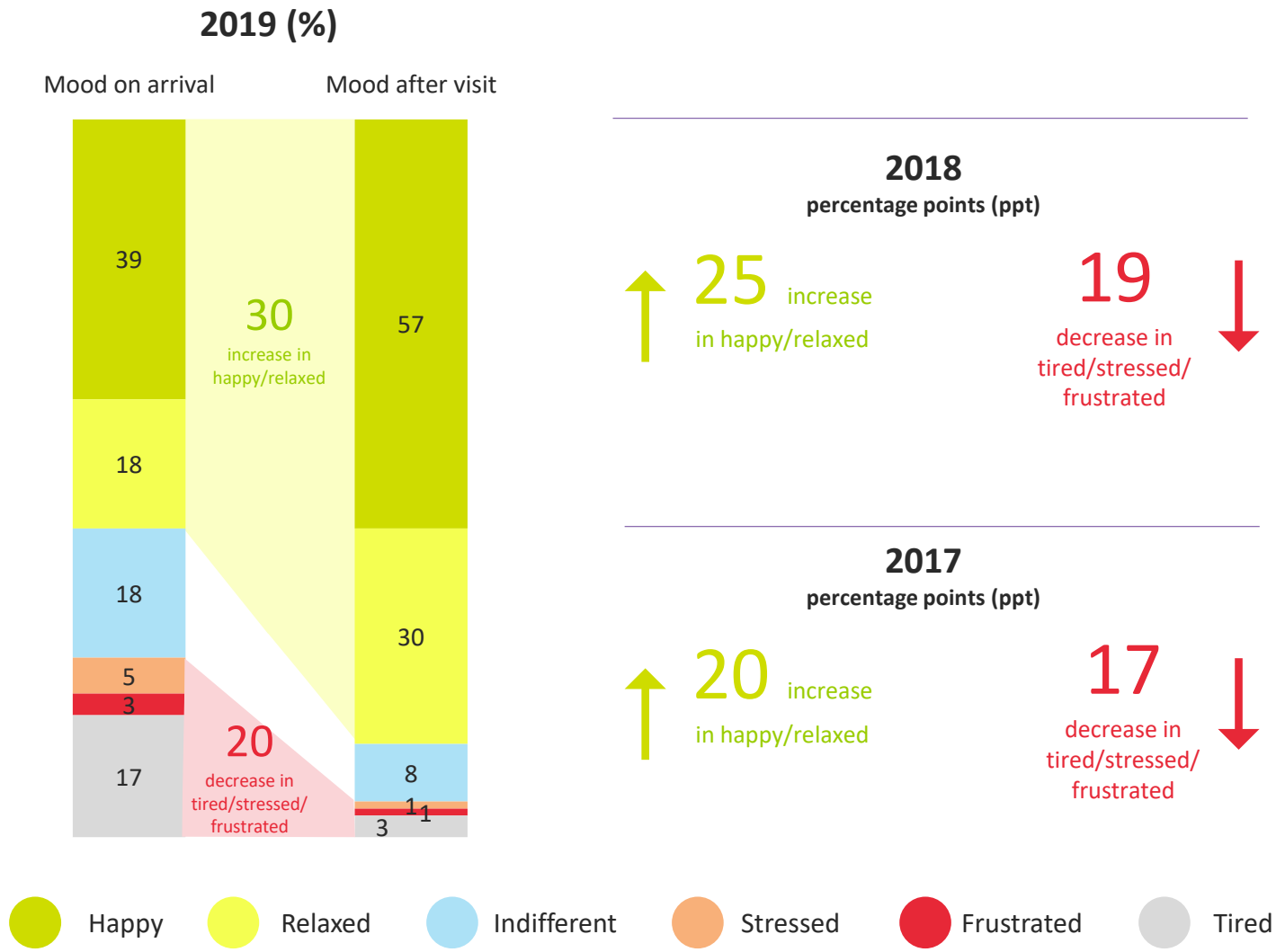
Top 5	2019	2018	2017	Rank
Norton Canes	**99**	100	99	1
Heston WB	**99**	87	90	2
Gloucester SB	**99**	97	99	3
Stafford NB	**99**	94	90	4
South Mimms	**99**	95	96	5

Bottom 5	2019	2018	2017	Rank
Charnock Richard SB	**77**	92	89	107
Frankley SB	**75**	91	95	108
Cullompton	**74**	93	97	109
Burtonwood	**73**	83	89	110
Severn View	**72**	85	83	111

Euro Garages Extra Moto Roadchef Welcome Break Westmorland

Q7. Overall, how satisfied are you with your experience at these Motorway Services today?

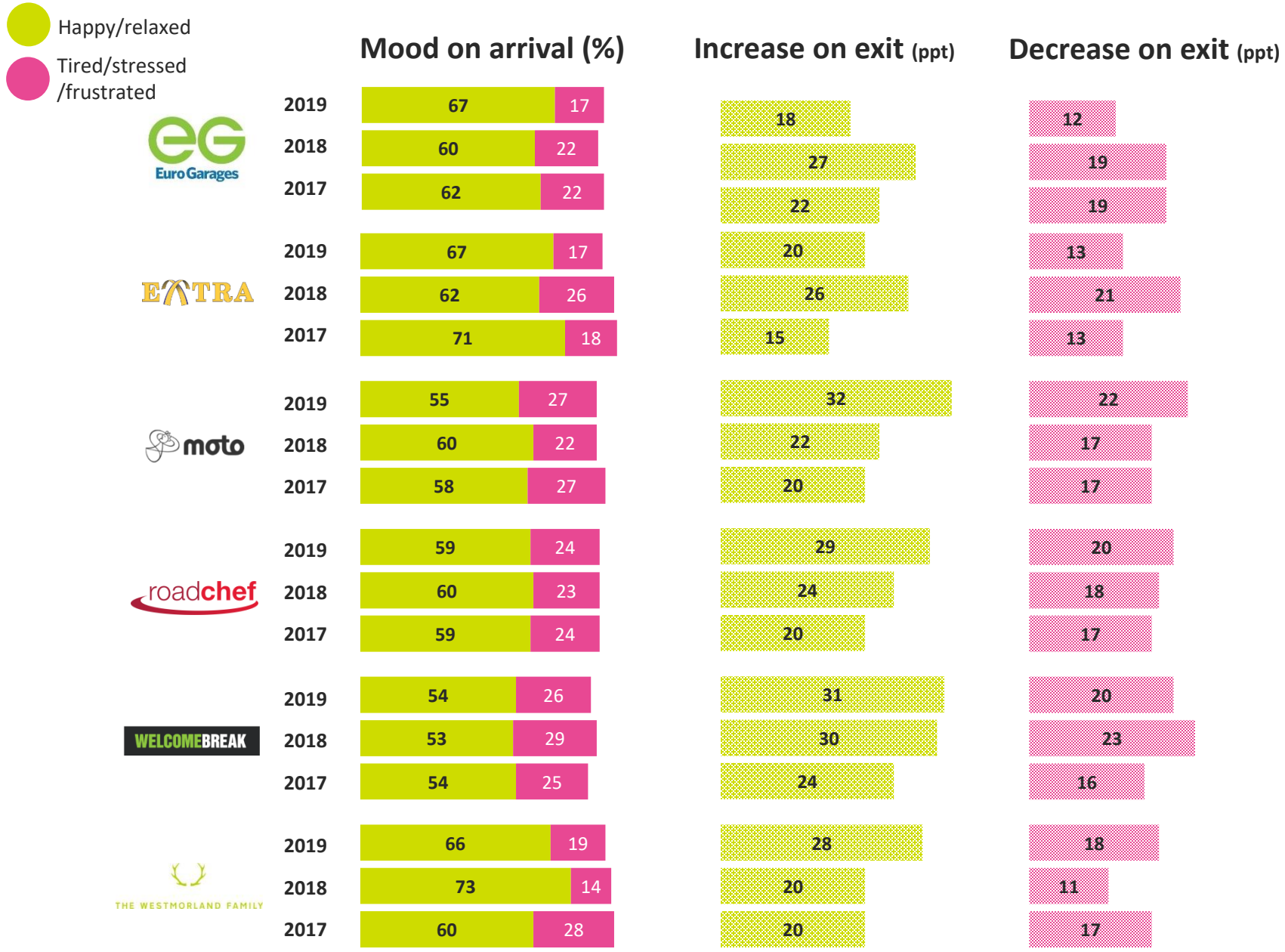
Mood on arrival and exit



Q4. Which of these images best describes your mood when you first arrived at these Motorway Services today?/Q19. Which of these images best describes your current mood after your visit?

Base: (2019/2018/2017) 11,609/9,629/8,701

Mood change between arrival and exit



Q4. Which of these images best describes your mood when you first arrived at these Motorway Services today?/Q19. Which of these images best describes your current mood after your visit?

Base (2019, 2018, 2017): Euro Garages (186/176/150), Extra (647/516/453), Moto (4,698/3,901/3,502), Roadchef (2,418/2,006/1,787), Welcome Break (3,194/2,667/2,391), Westmorland (466/360/340)

Mood change between arrival and exit

Happy/relaxed

Tired/stressed/frustrated

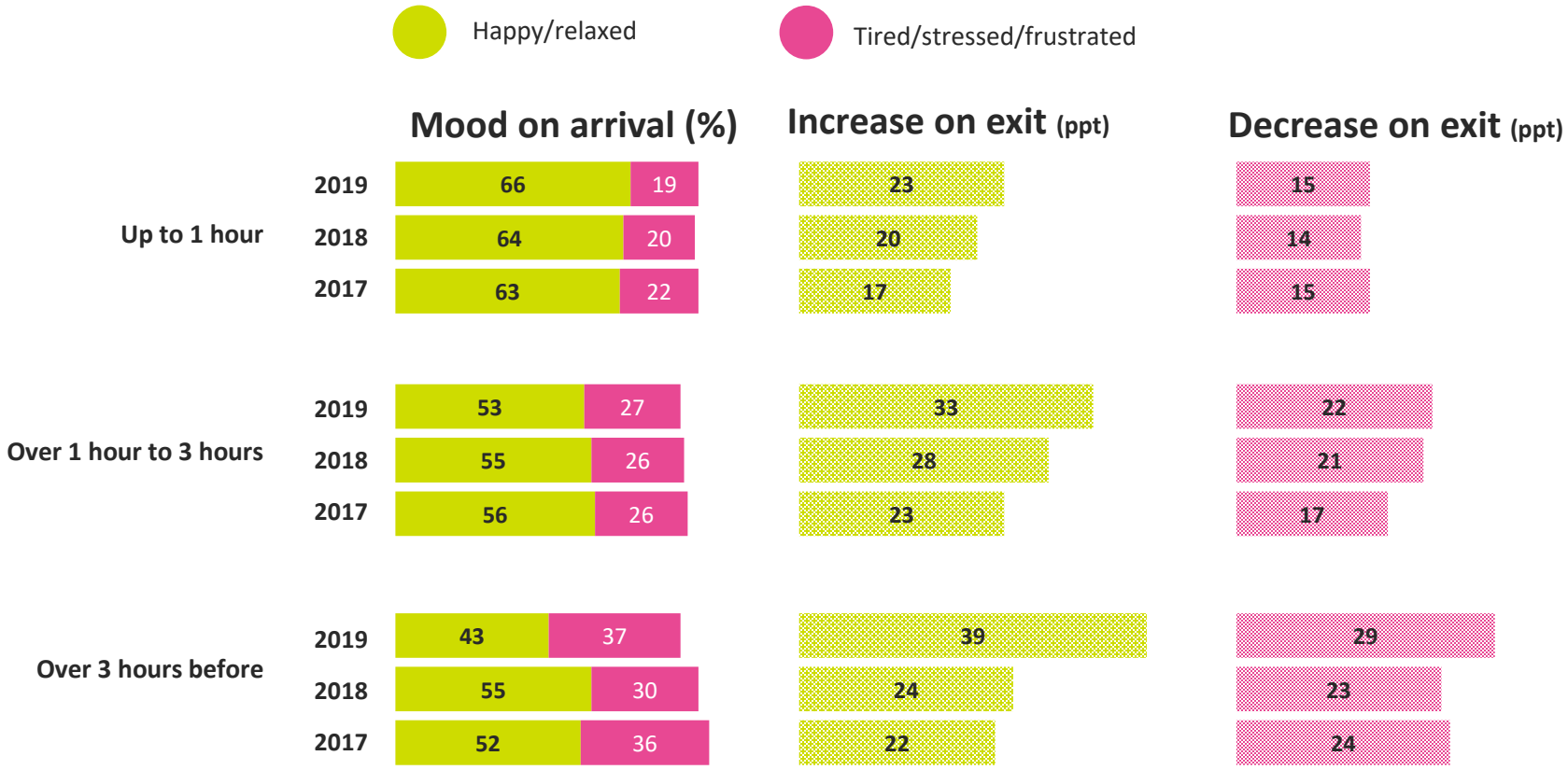
		Mood on arrival (%)		Increase on exit (ppt)	Decrease on exit (ppt)
Leisure	2019	59	24	29	19
	2018	60	23	25	18
	2017	59	24	21	16
Business	2019	55	25	30	21
	2018	56	24	25	19
	2017	55	28	21	19
Commuter	2019	51	31	35	22
	2018	55	28	26	22
	2017	55	29	20	19
Professional	2019	50	29	34	23
	2018	56	28	23	21
	2017	60	27	16	17

Q4. Which of these images best describes your mood when you first arrived at these Motorway Services today?/Q19. Which of these images best describes your current mood after your visit?

Base (2019/2018/2017) Leisure (7,275/6,261/5,600) Business (2,494/1,749/1,536) Commuter (586/634/617) Professional (1,254/982/948)

Mood change between arrival and exit

Results showed for different amounts of time on the road before stopping

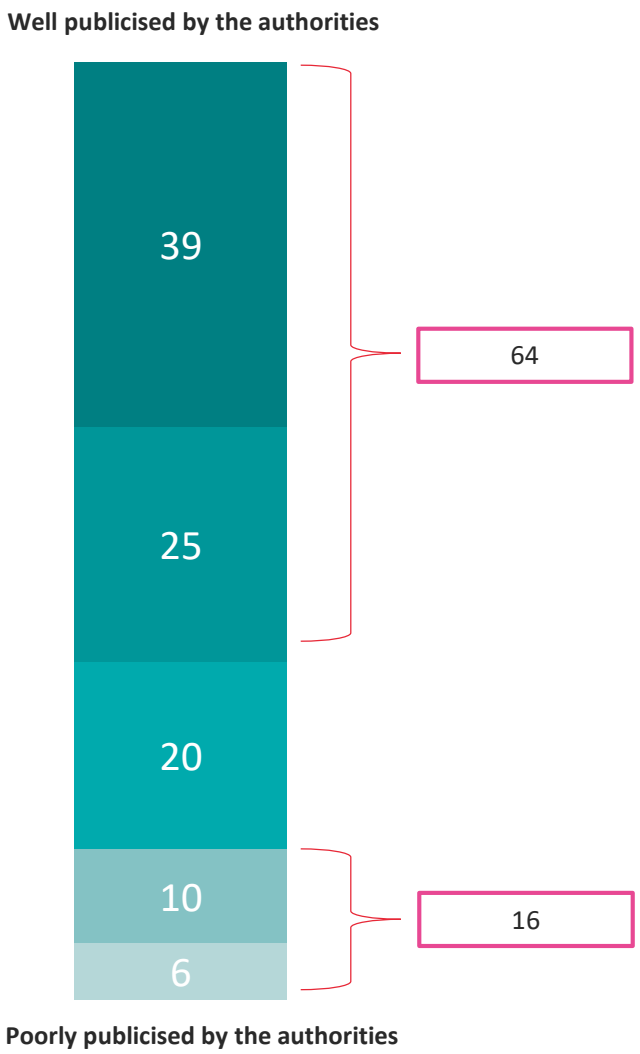


Q4. Which of these images best describes your mood when you first arrived at these Motorway services today?/Q19. Which of these images best describes your current mood after your visit?

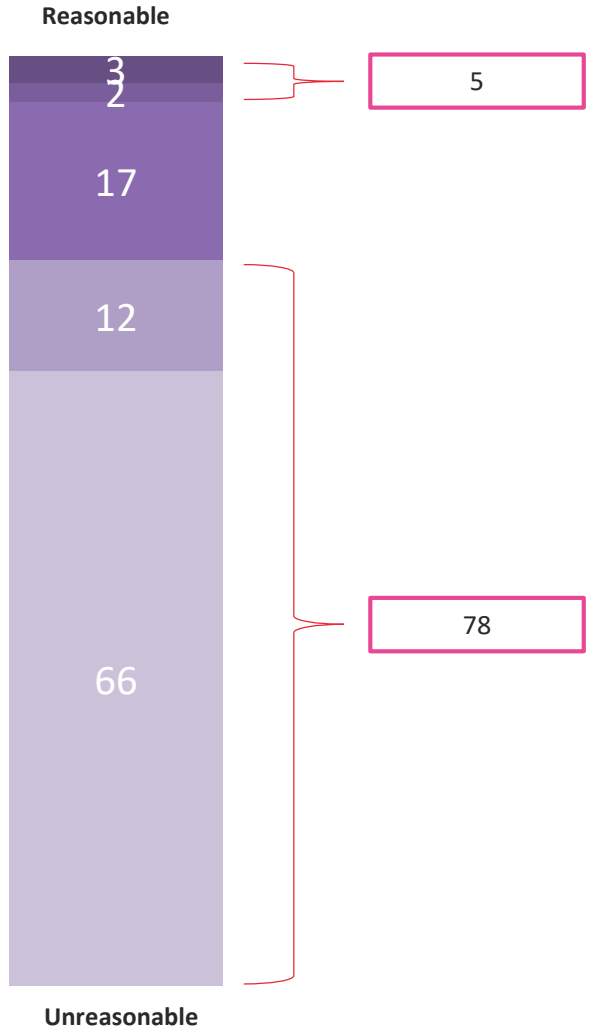
Base (2019/2018/2017): Up to one hour (4,187/3,514/3,248) 1 to 3 hours (6,356/5,206/4,557) Over 3 hours (1,066/906/896)

Attitudes towards break benefits and MSA fuel costs

The benefits of taking a break from driving are…



The cost of fuel at motorway services is……

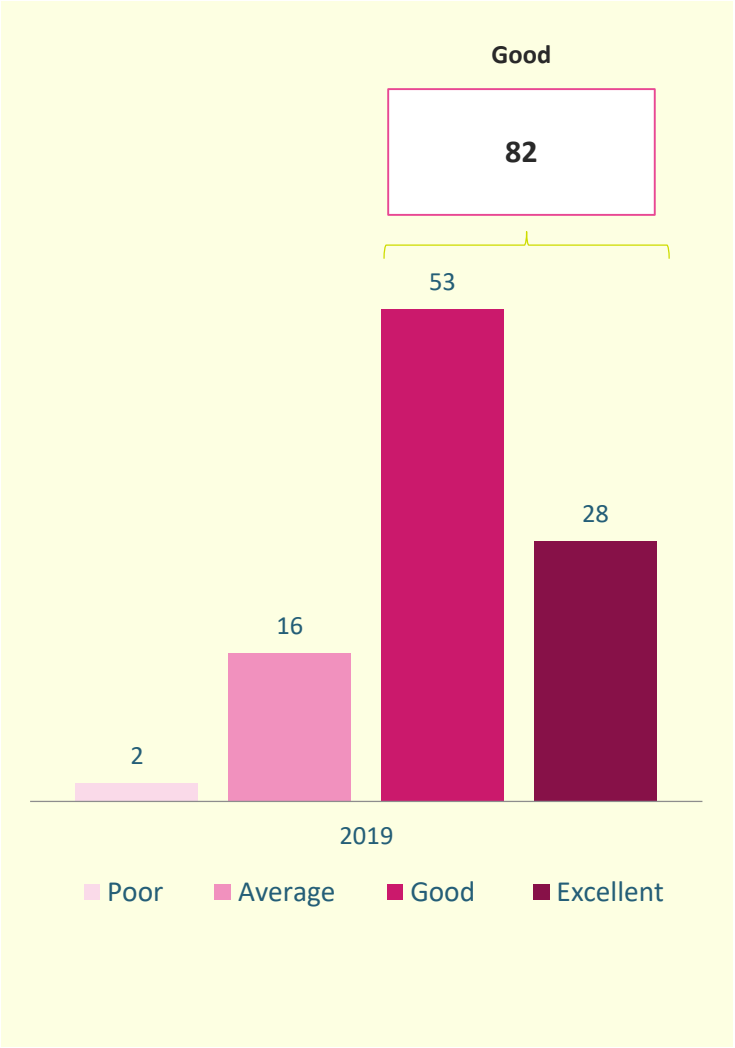


Q22. Where on the scale best represents your view on the following statement…

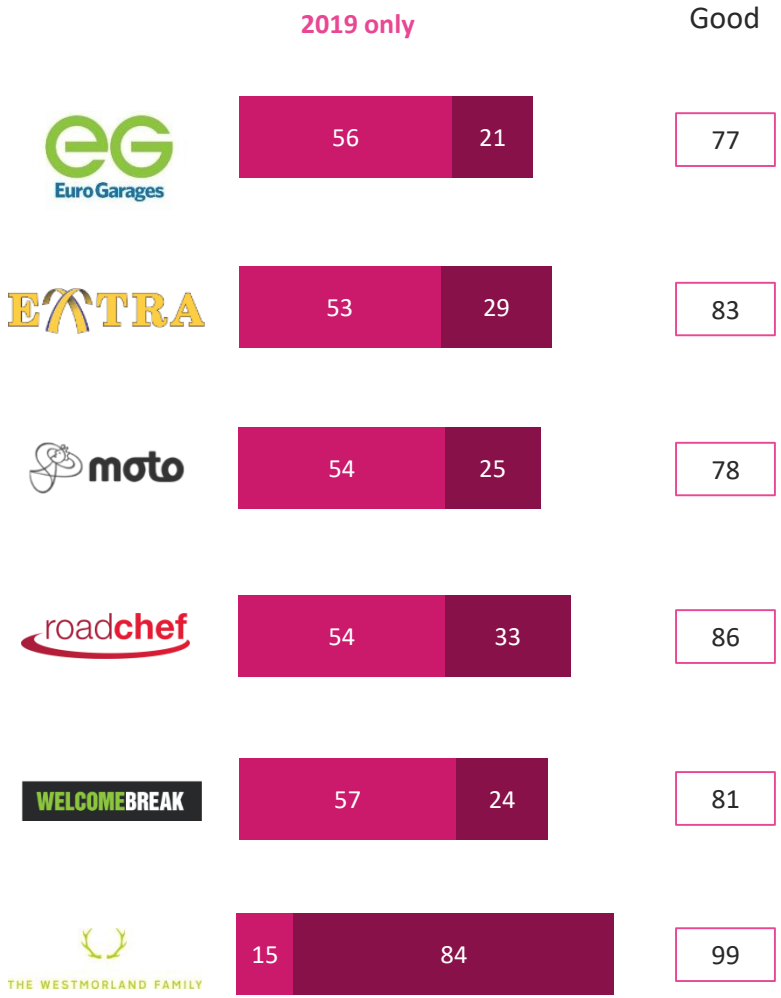
Base (All MSA 2019): 11,609

Overall impression (1)

All MSAs (%)



Operator comparison (%)



Q20. What's the overall impression you got of <<MSA name>> services?

Base (2019): All MSAs (11,609) Euro Garages (186), Extra (647), Moto (4,698), Roadchef (2,418), Welcome Break (3,194), Westmorland (466)

Overall impression (2)

Visitor type (%)

Leisure

2019: 53 | 30 | 83

Business

2019: 53 | 28 | 81

Commuter*

2019: 56 | 31 | 87

Professional

2019: 53 | 20 | 74

Age (%)

	18 to 34	35 to 54	55+
2019	88	82	78
	35	28	26
	53	54	53

Gender (%)

	Male	Female
2019	81	83
	27	30
	54	53

Good | Excellent | % good/excellent

*Low base size, please use with caution

Q20. What's the overall impression you got of <<MSA name>> services?

Base (2019) Leisure (7,275) Business (2,494) Commuter (586) Professional (1,254) Age: 18 to 34 (2,341) 35-54 (4,456) 55+ (4,786) Gender: Male (7,315) Female (4,294)

Overall impression (3)

% good/excellent

Motorway service area	2019
Baldock	89
Beaconsfield	89
Birch EB	68
Birch WB	81
Birchanger Green	88
Blackburn with Darwen	88
Blyth	64
Bridgwater	71
Burton-in-Kendal	71
Burtonwood	46
Charnock Richard NB	55
Charnock Richard SB	69
Cherwell Valley	94
Chester	89
Chieveley	82
Clacket Lane EB	79
Clacket Lane WB	92
Cobham	88
Corley NB	94
Corley SB	94
Cullompton	61
Doncaster North	97
Donington Park	86

Motorway service area	2019
Durham	76
Exeter	90
Ferrybridge	80
Fleet NB	87
Fleet SB	96
Frankley NB	68
Frankley SB	42
Gloucester NB	99
Gloucester SB	99
Gordano	82
Hartshead Moor EB	80
Hartshead Moor WB	75
Heston EB	95
Heston WB	100
Hilton Park NB	73
Hilton Park SB	83
Hopwood Park	90
Keele NB	83
Keele SB	81
Killington Lake	91
Knutsford NB	63
Knutsford SB	77

Motorway service area	2019
Lancaster NB	81
Lancaster SB	68
Leicester Forest East NB	79
Leicester Forest East SB	72
Leigh Delamere EB	83
Leigh Delamere WB	81
London Gateway	97
Maidstone	90
Medway EB	63
Medway WB	61
Membury EB	60
Membury WB	63
Michaelwood NB	94
Michaelwood SB	85
Newport Pagnell NB	84
Newport Pagnell SB	72
Northampton NB	91
Northampton SB	85
Norton Canes	98
Oxford	99
Pease Pottage	90
Peterborough	81
Reading EB	80

Motorway service area	2019
Reading WB	77
Rivington NB	76
Rivington SB	78
Rownhams NB	69
Rownhams SB	82
Sandbach NB	77
Sandbach SB	90
Sedgemoor NB	67
Sedgemoor SB	91
Severn View	58
South Mimms	97
Southwaite NB	76
Southwaite SB	75
Stafford NB	92
Stafford SB	95
Strensham NB	84
Strensham SB	92
Tamworth	90
Taunton Deane NB	90
Taunton Deane SB	86
Tebay NB	97

Motorway service area	2019
Tebay SB	99
Telford	85
Thurrock	65
Tibshelf NB	95
Tibshelf SB	86
Toddington NB	74
Toddington SB	79
Trowell NB	83
Trowell SB	84
Warwick NB	94
Warwick SB	90
Washington NB	58
Washington SB	85
Watford Gap NB	76
Watford Gap SB	78
Wetherby	90
Winchester NB	95
Winchester SB	87
Woodall NB	69
Woodall SB	89
Woolley Edge NB	70
Woolley Edge SB	89

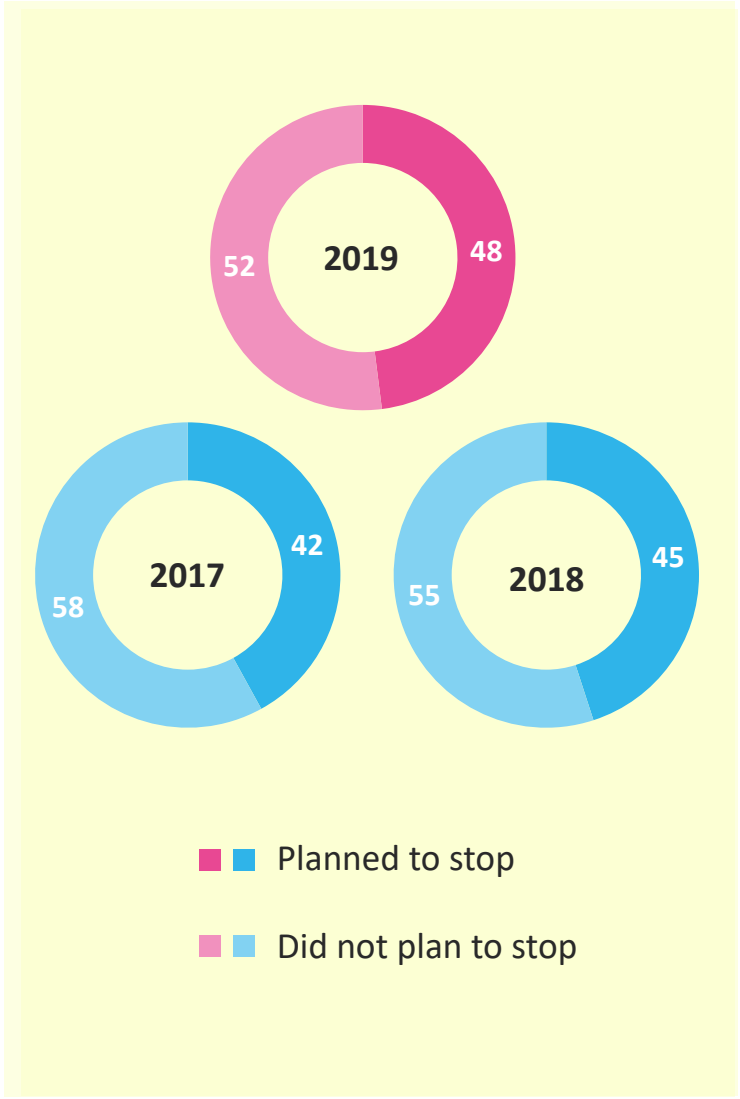
Euro Garages Extra Moto Roadchef Welcome Break Westmorland

Q20. What's the overall impression you got of <<MSA name>> services

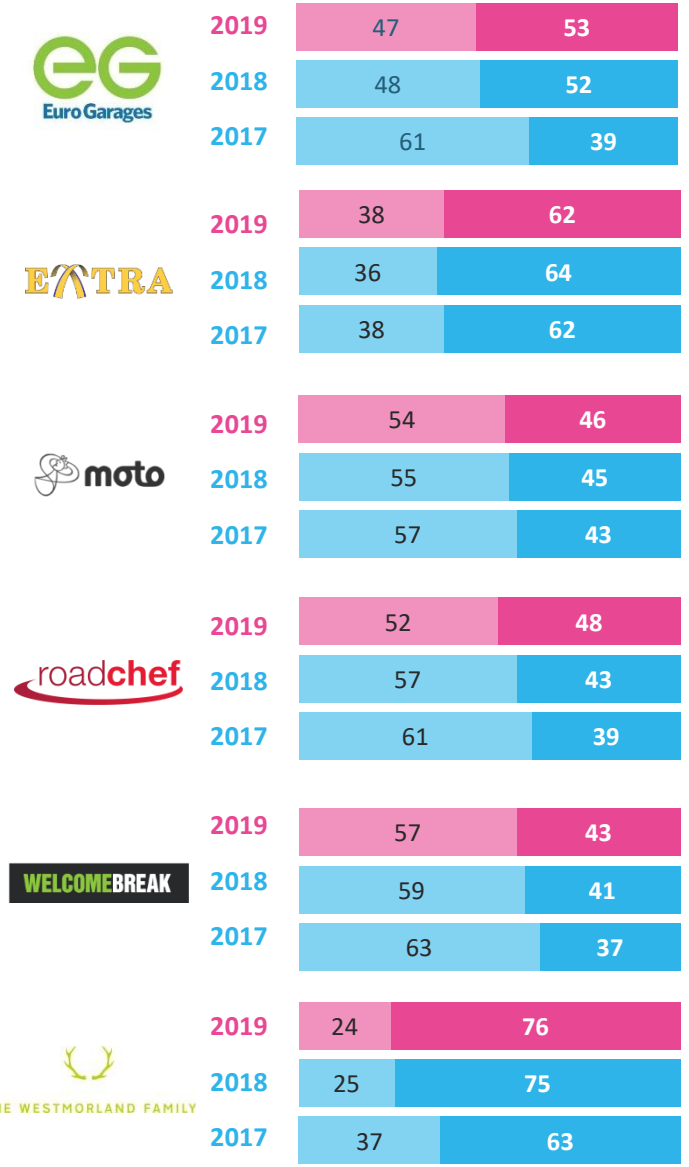
Reasons for visiting

Decision to stop at this MSA (1)

All MSAs (%)



Operator comparison (%)

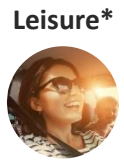


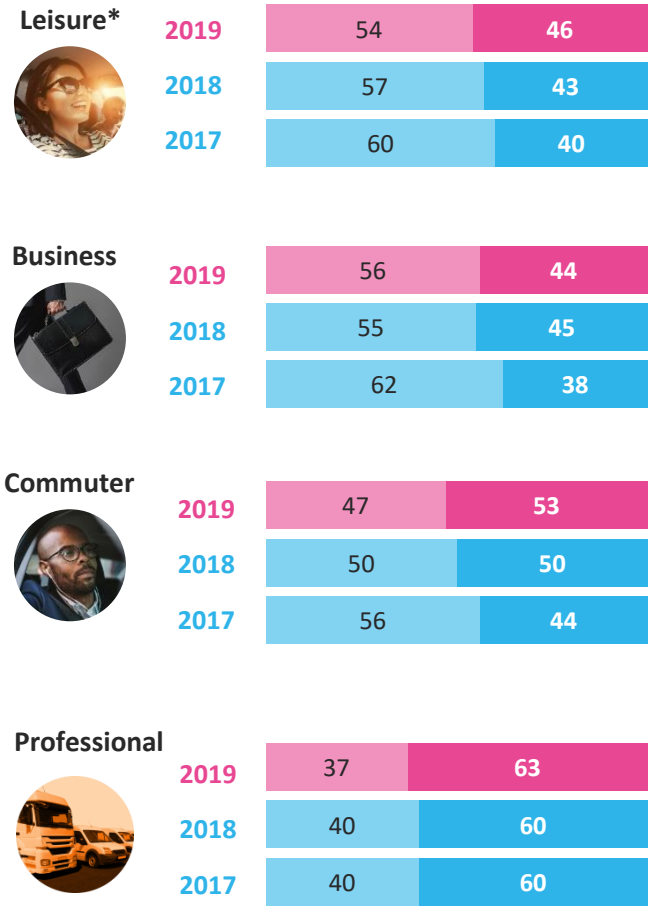
Q9. Did you intend to stop at these particular Motorway Services before you set off today?

Base (2019, 2018, 2017): Euro Garages (185/176/150), Extra (639/511/442), Moto (4,596/3,891/3,386), Roadchef (2,340/1,964/1,737), Welcome Break (3,074/2,593/2,290), Westmorland (462/349/326)

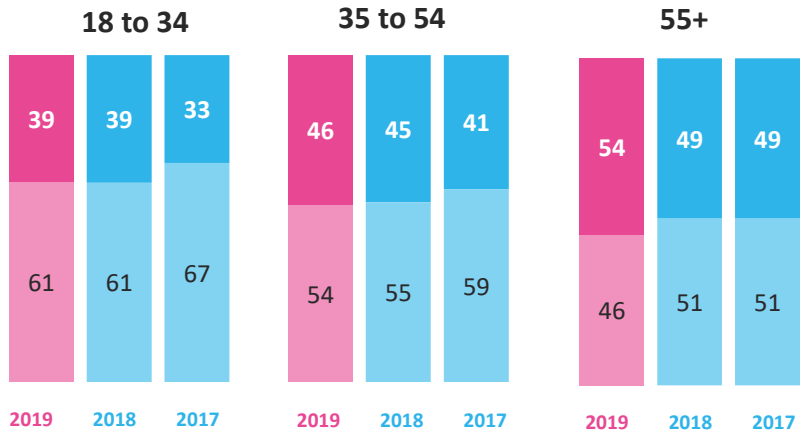
Decision to stop at this MSA (2)

Visitor type (%)

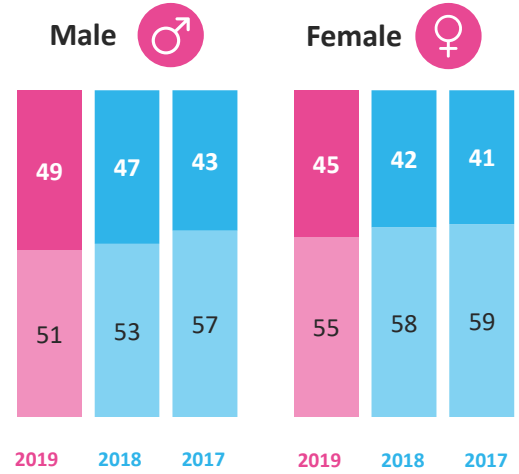




Age (%)



Gender (%)

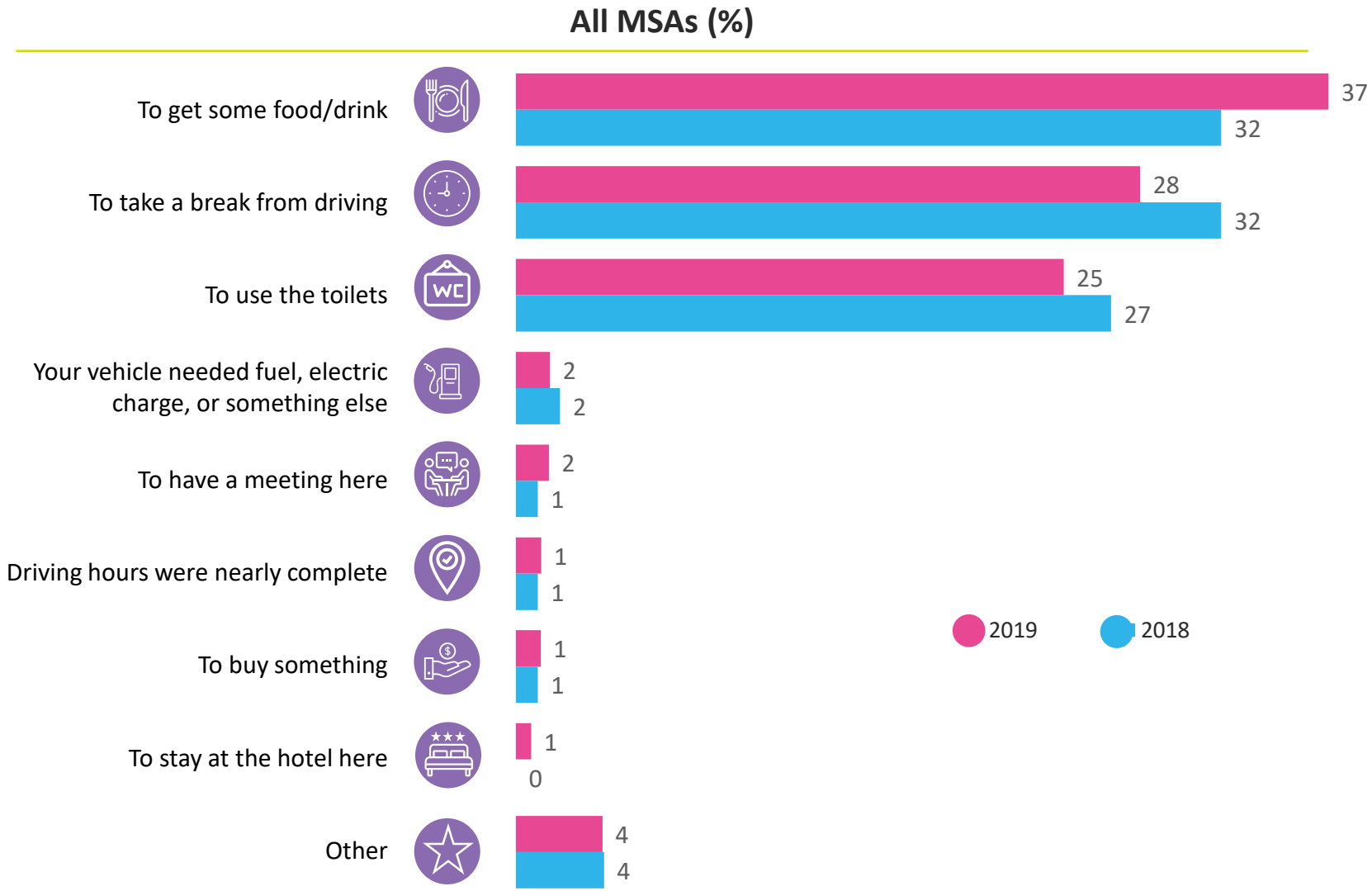


Q9. Did you intend to stop at these particular Motorway Services before you set off today?

Base (2019/2018/2017) Leisure (6,962/6,047/5,297) Business (2,494/1,749/1,536) Commuter (586/634/617) Professional (1,254/982/948). Age: 18 to 34 (2,300/1,970/1,853) 35-54 (4,408/3,570/3,333) 55+ (4,563/3,820/3,180) Gender: Male (7,174/5,720/5,217) Female (4,122/3,692/3,181)

* Excludes those who were part of a tour party.

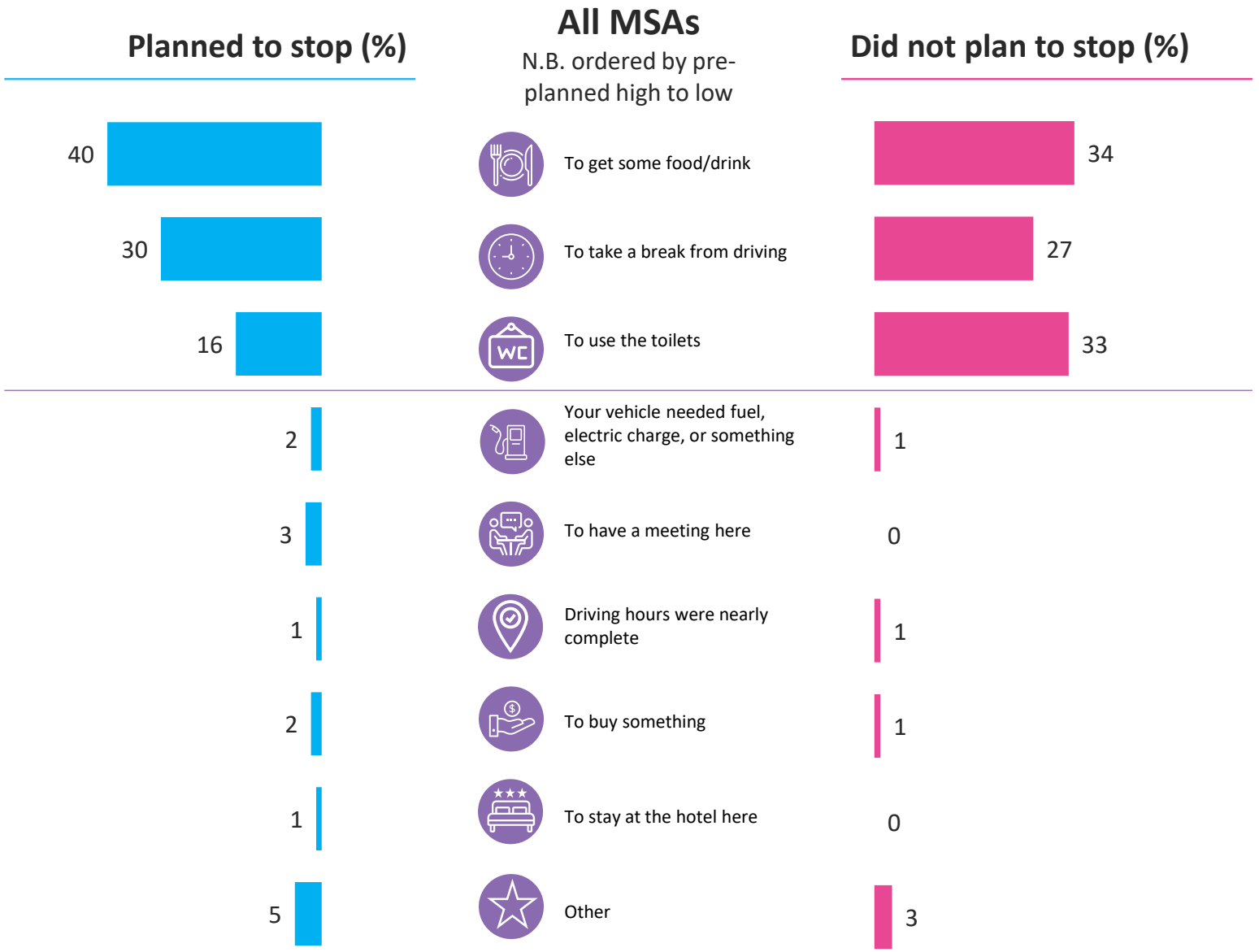
Reasons for visiting



Q8. What was the main reason for deciding to stop here? Question not asked in 2017

Base (All MSAs 2019/2018): 11,296/9,412

Reasons for visiting

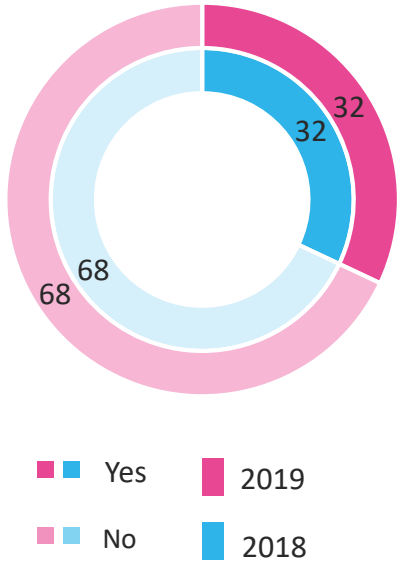


Q8.What was the main reason for deciding to stop here?

Base (All MSAs 2019): Planned to stop (5,405), Did not plan to stop (5,891)

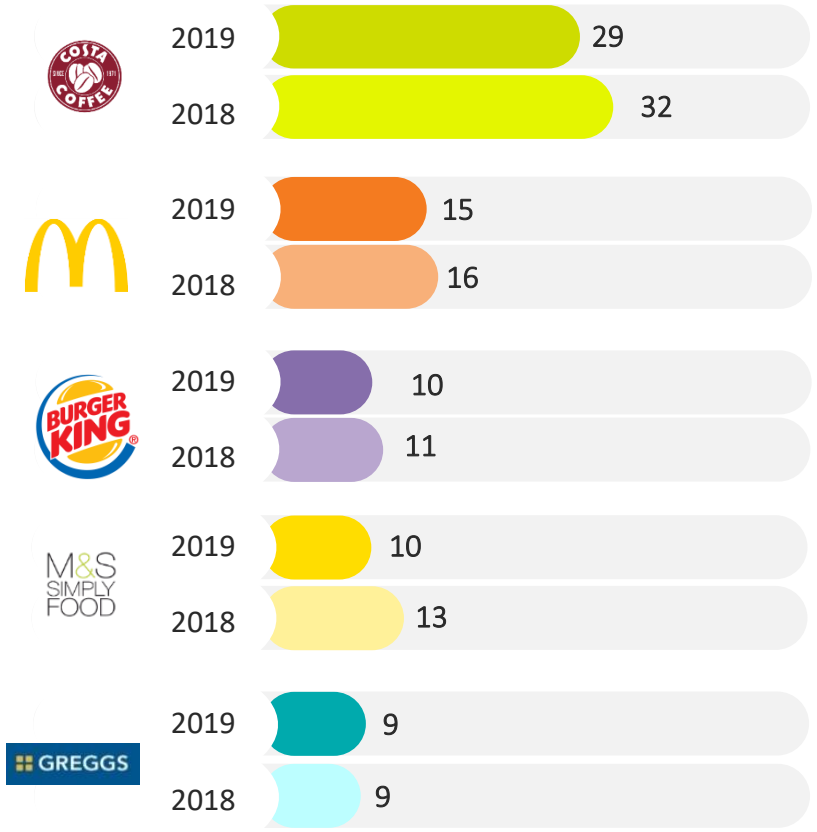
Brand impact on stopping

Saying any brand made them more inclined to stop at a specific MSA (%)



Top 5 brands mentioned (%)*

(of those who said brand influenced stopping)



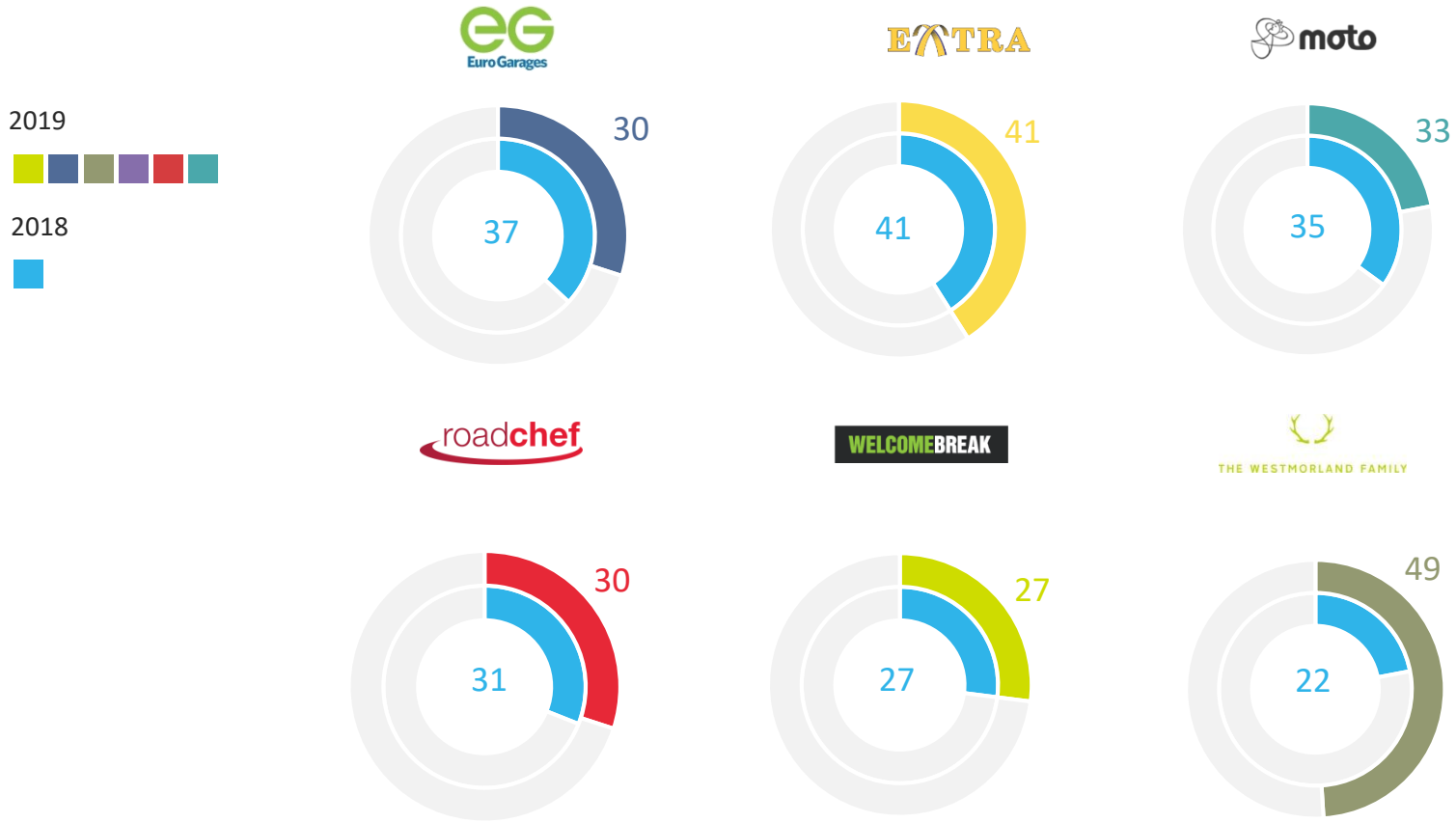
* The level of a brand's impact is dependent, in part, on how widely available that brand is across the 111 MSAs

Q10. Did any specific brands being here make you more inclined to stop at these Motorway Services?

Base (2019/2018): All MSAs (11,296/9,412) Brands mentioned (3,629/2,973)

Brand impact on stopping

Saying any brand made them more inclined to stop at a specific MSA
% yes*



* The level of a brand's impact is dependent, in part, on how widely available that brand is across the 111 MSAs

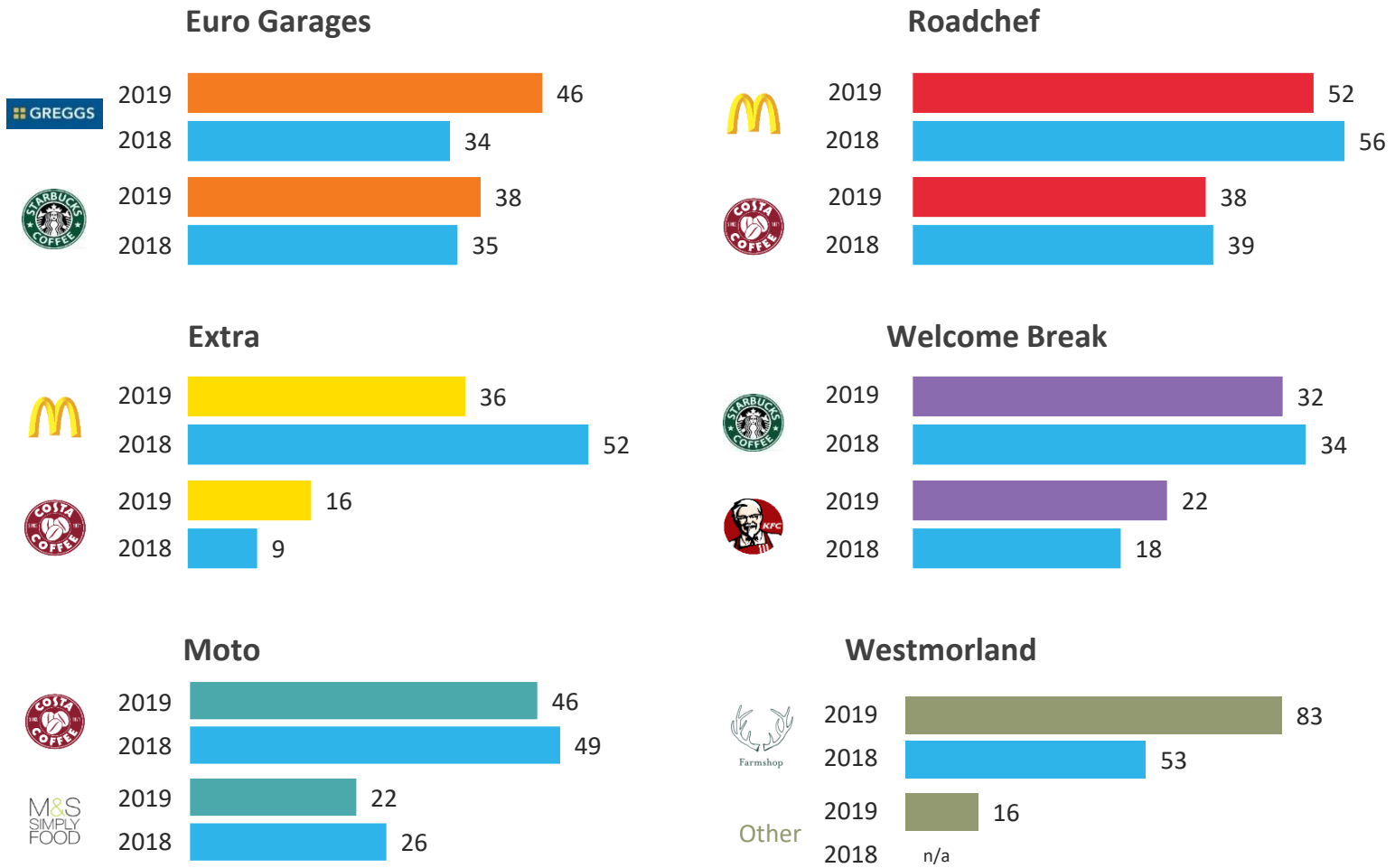
Q10. Did any specific brands being here make you more inclined to stop at these Motorway Services?

Base (2019,2018): Euro Garages (185/176) Extra (639/511) Moto (4596/3819) Roadchef (2340/1964) Welcome Break (3017/2593) Westmorland (462/349)

Brand impact on stopping

Saying brand made them more inclined to stop at a specific MSA

Top brands by operator (%)*



* The level of a brand's impact is dependent, in part, on how widely available that brand is across the 111 MSAs

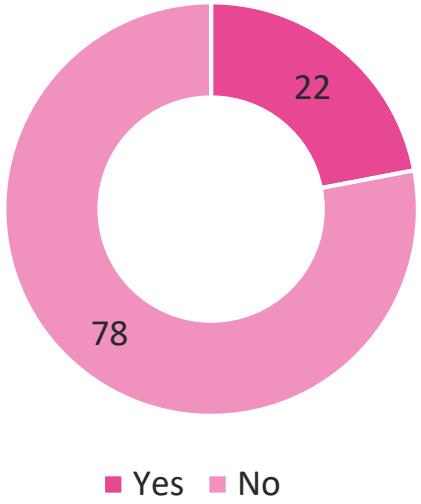
Q10. Did any specific brands being here make you more inclined to stop at these Motorway Services?

Base (2019,2018): Euro Garages (56/ 65) Extra (267/207) Moto (1,541/1,323) Roadchef (709/613) Welcome Break (843/688) Westmorland (215/77)

Something else inclined them to stop

Saying something else inclined them to stop

All MSAs (%)



Other reasons to stop stated

"The location, as there's nothing much else around here"
Professional, Euro Garages

"The atmosphere and farm shop are hugely better than the other choices"
Leisure, Westmorland

"I've been here before and it's very clean, efficient and has good quality"
Leisure, Roadchef

"It's always nice and clean and the staff are friendly."
Commuter, Extra

"The dog facilities. There is a nice piece if grass and there is always room to park there"
Leisure, Welcome Break

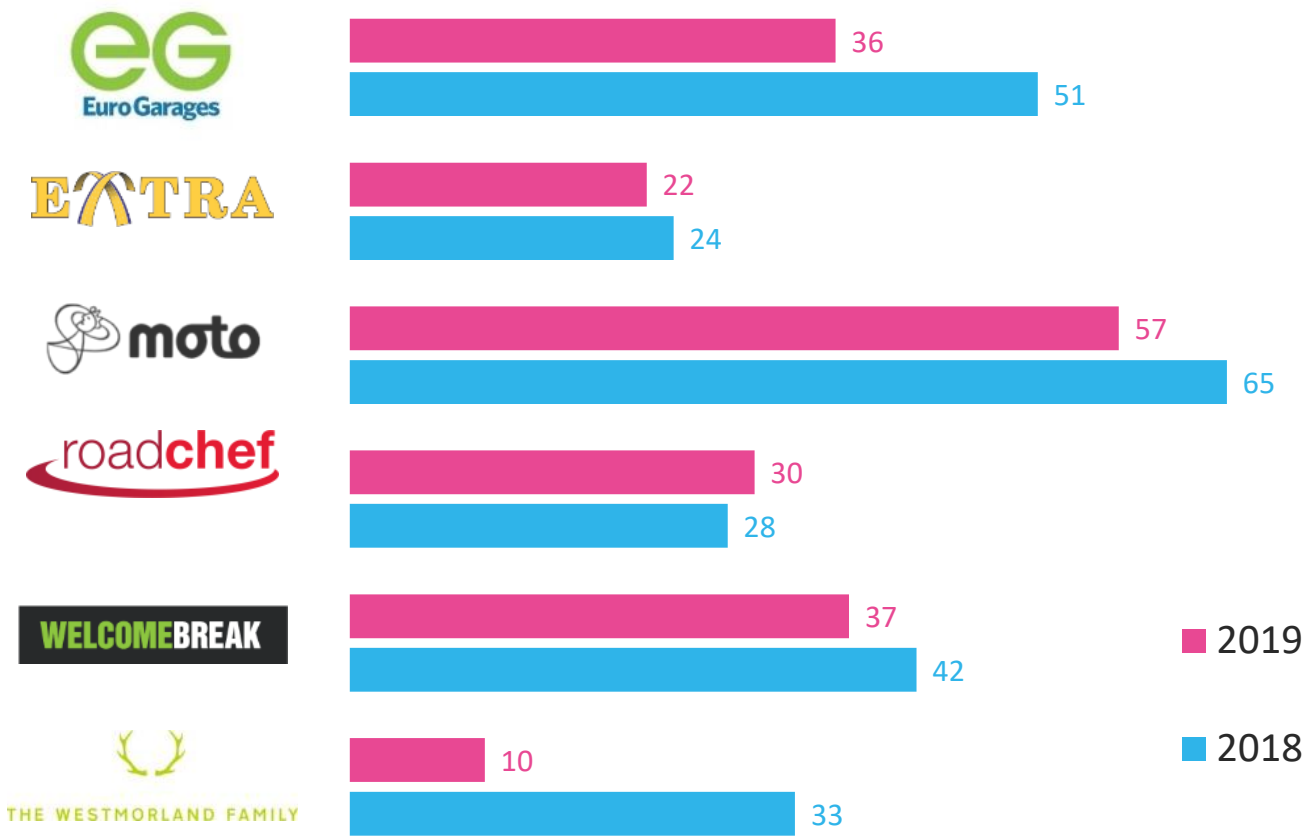
"It's habit. I know where this place is. So I don't have to think about it"
Leisure, Moto

Q11. Was there anything else about these Motorway services which made you more inclined to stop here?

Base: all MSAs (11,296)

Knowing who runs the MSA visited

% of visitors naming correct operator….



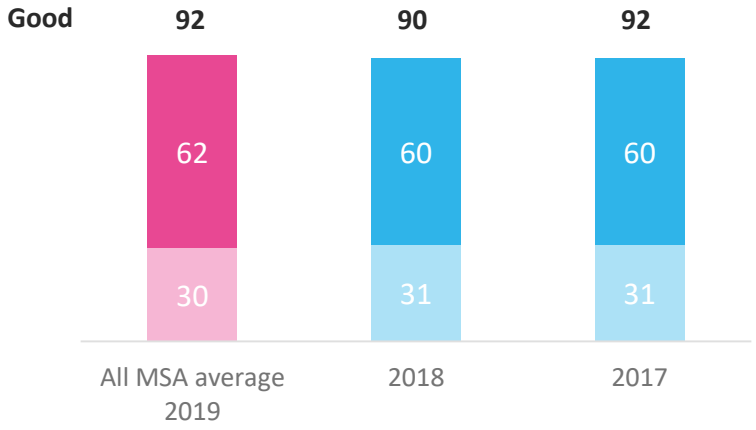
Q21. Which organisation do you think runs these Motorway Services?

Base (2019, 2018): EuroGarages (186/176), Extra (647/516), Moto (4,698/3,901), Roadchef (2,418/2,006), Welcome Break (3,194/2,667), Westmorland (466/360)

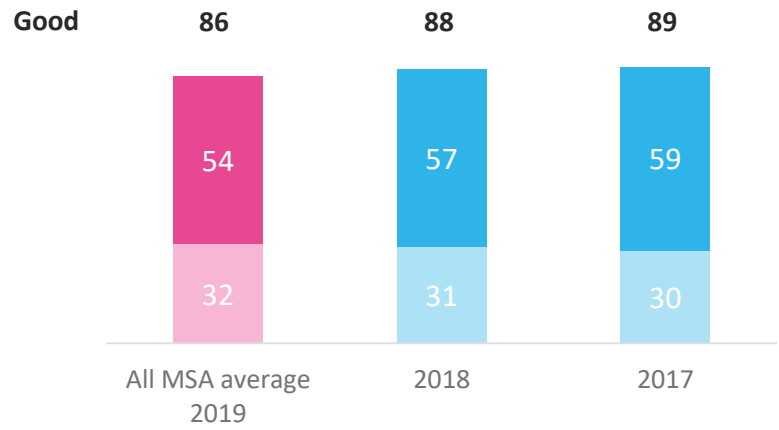
MSA usage

Rating of commonly used aspects (1)

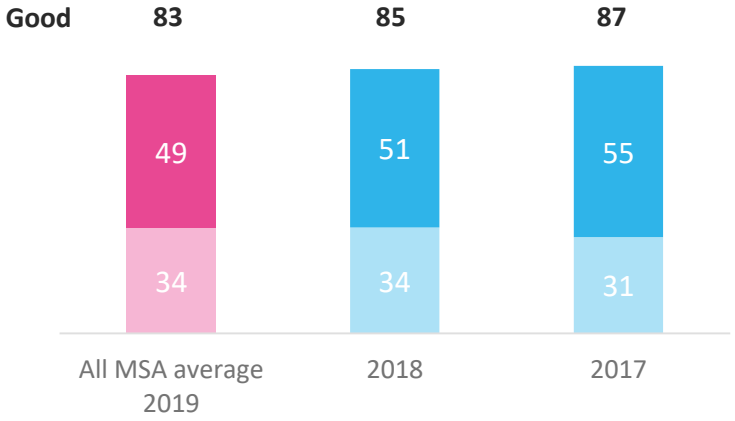
Approach signs (%)



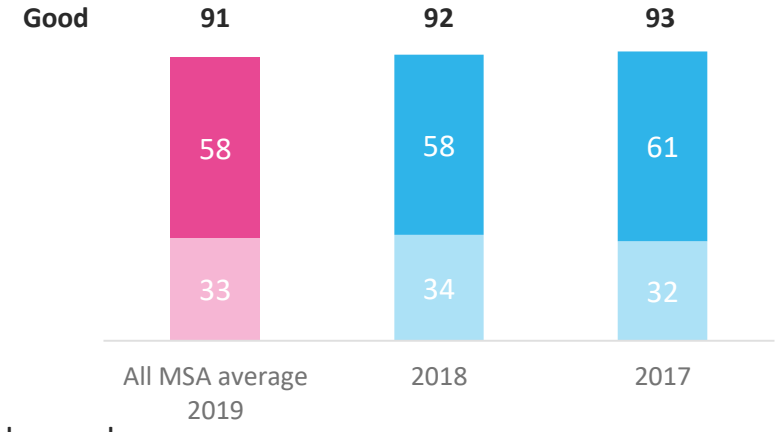
Slip road (%)



Car park layout (%)



Vehicle safety in car park (%)



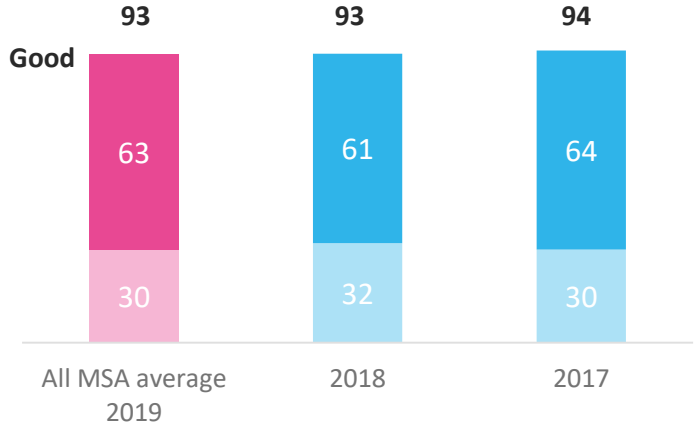
Very good Fairly good

Q12. Thinking about your arrival at these Motorway Services today, please rate the following…

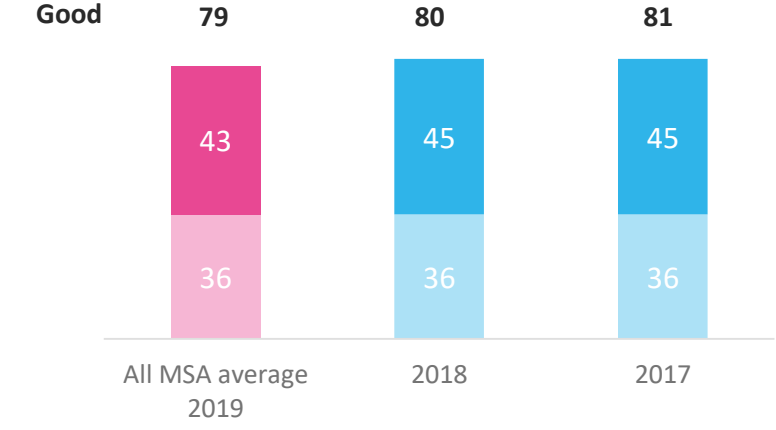
Base (2019/2018/2017): All MSA (11,560-11,120/9,608-9,346/8,594-8,265)

Rating of commonly used aspects (2)

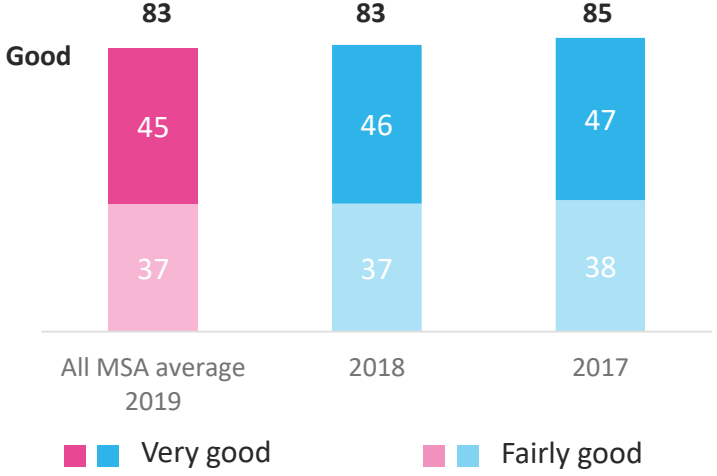
Walk from vehicle to building (%)



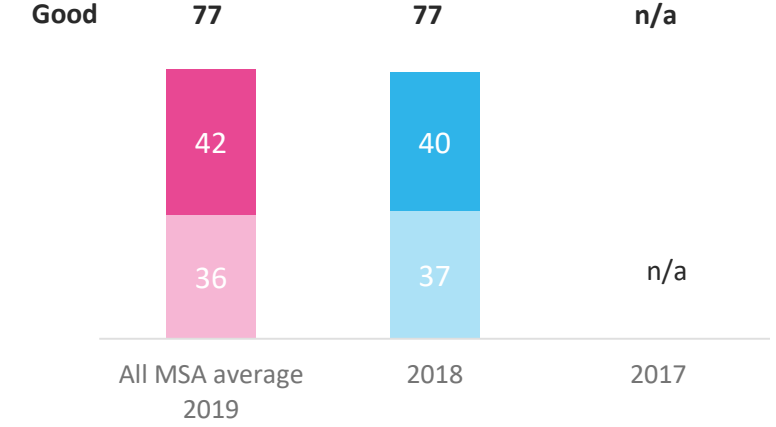
Impression of building exterior (%)



Impression of building interior (%)



Road surfaces in the MSA* (%)

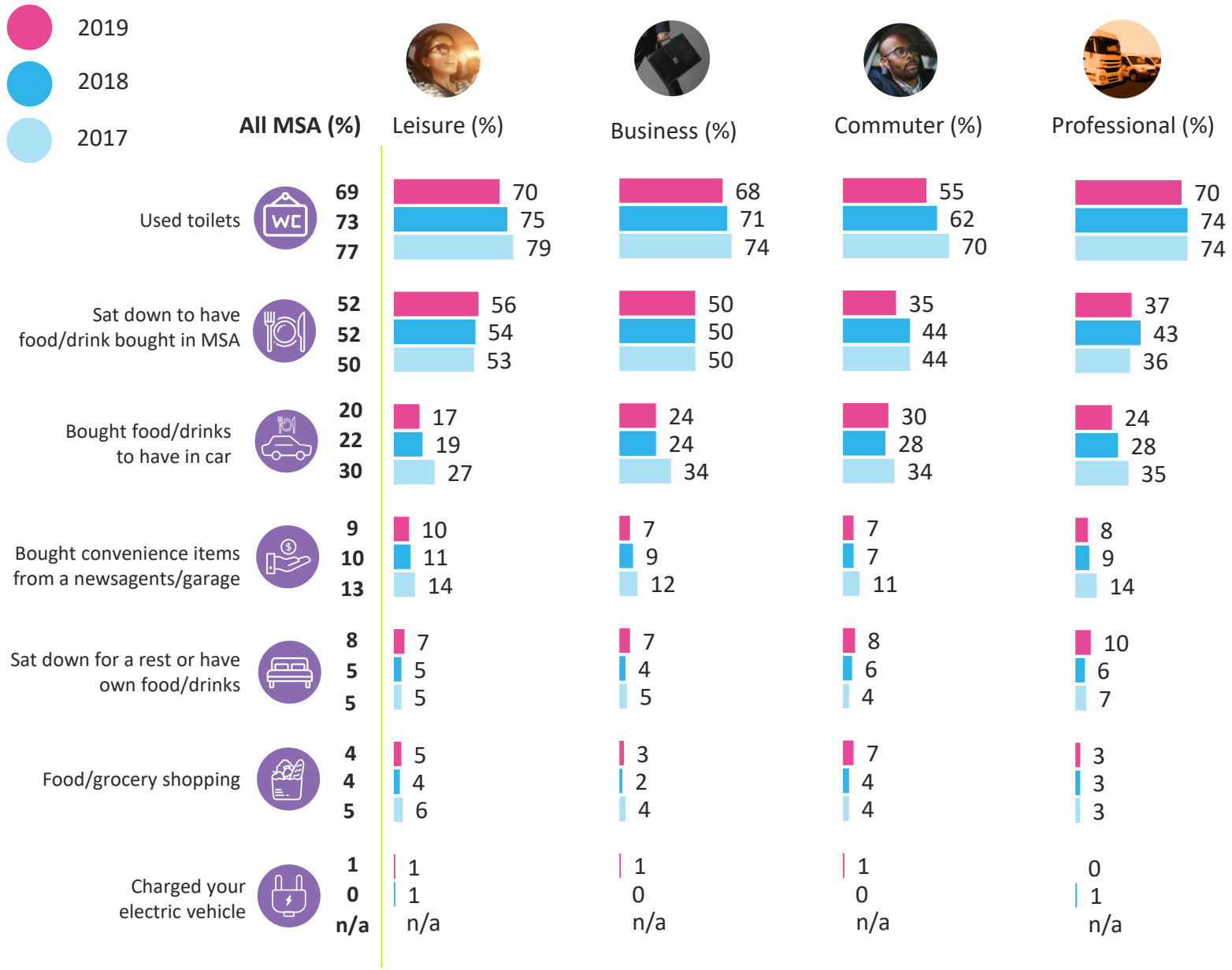


*road surfaces not asked in 2017

Q12. Thinking about your arrival at these Motorway Services today, please rate the following…

Base (2019/2018/2017): All MSA (11,560-11,120/9,608-9,346/8,594-8,265)

Aspects of the MSA used



Q13. Which of the following have you done here today? *Please select all which apply* (*charged vehicle not asked in 2017)

Base: 2019/2018/2017 Leisure (7,275/6,261/5,600), Business (2,494/1,749/1,536), Commuter (586/634/617), Professional (1,254/982/948)

Who they bought food or drink from

Top 2 brands (%)*

* The level of purchase of a brand is dependent, in part, on how widely available that brand is across the 111 MSAs

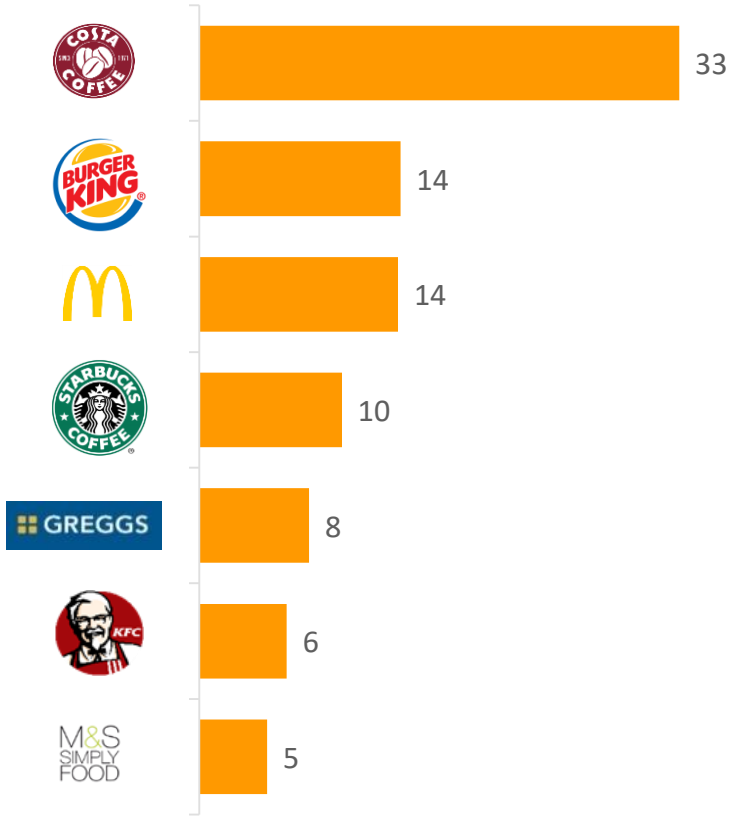
Q14. From which brand did you buy the food/drinks you sat down to have today?/ Q15. From which brand did you buy the food/drinks you will have in your vehicle?

Base (In MSA, In car): Euro Garages (84/45), Extra (377/125), Moto (2,532/882), Roadchef (1,364/386), Welcome Break (1,422/608), Westmorland (275/78)

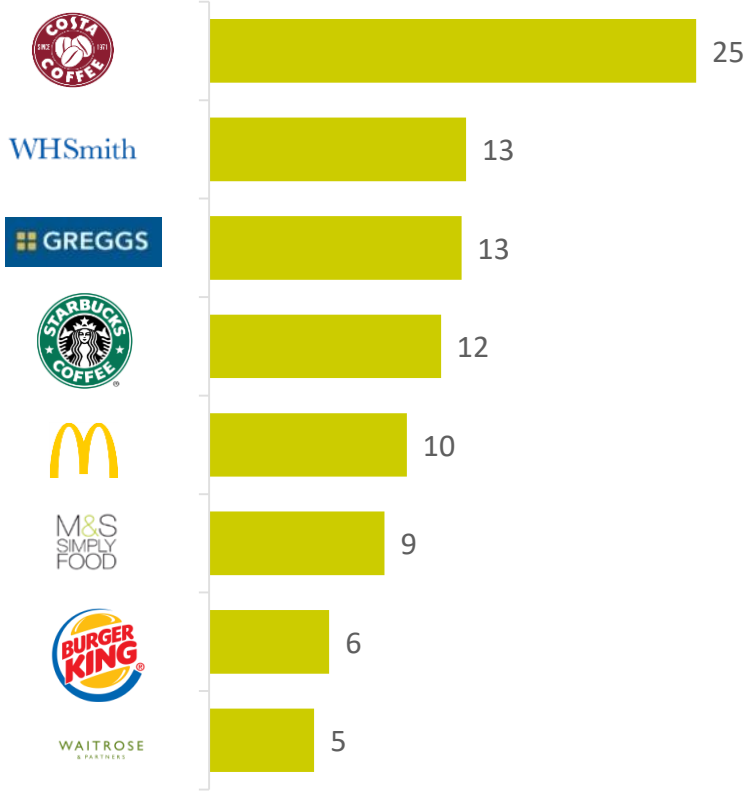
* Low base

Where bought food

To eat/drink in MSA (%)*



To eat/drink in car (%)*



* The level of purchase of a brand is dependent, in part, on how widely available that brand is across the 111 MSAs

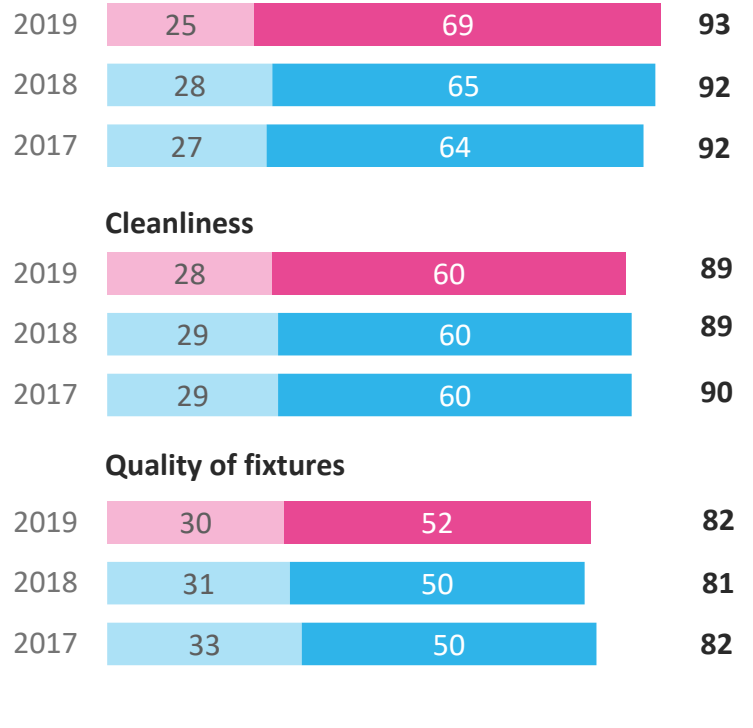
Q14. From which brand did you buy the food/drinks you sat down to have today?/ Q15. From which brand did you buy the food/drinks you will have in your vehicle?

Base 2019: Bought to eat in MSA: 6,054; Bought food for car: 2,124

Rating of aspects used [1]

Toilets – all MSAs (%)

69% of visitors used them (2019)



2019 operator scores – good (%)

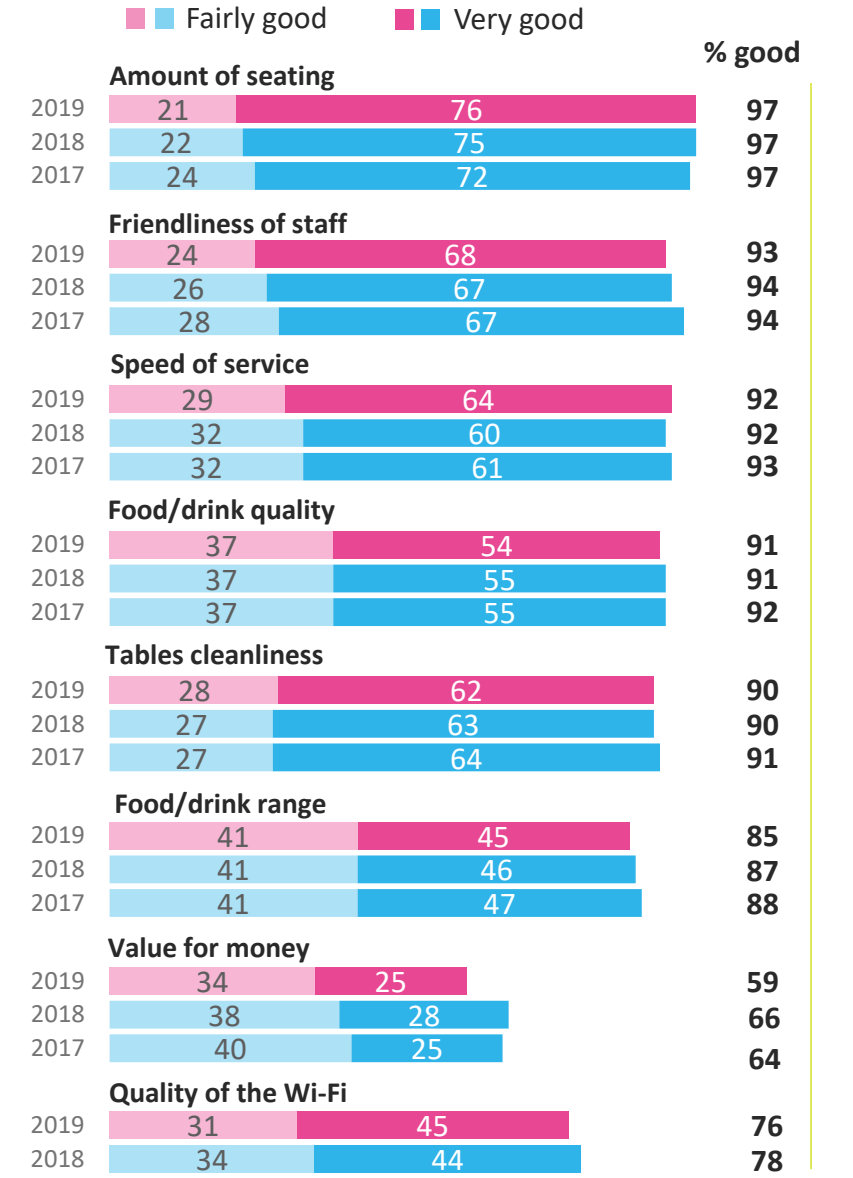
Q16. You said that you did..... Please rate using the scale below.

Base 2019/2018/2017: 7759 6991; 6523. EuroGarages: 101. Extra: 361 Moto: 2973 Roadchef: 1633 Welcome Break: 2320 Westmorland: 371.

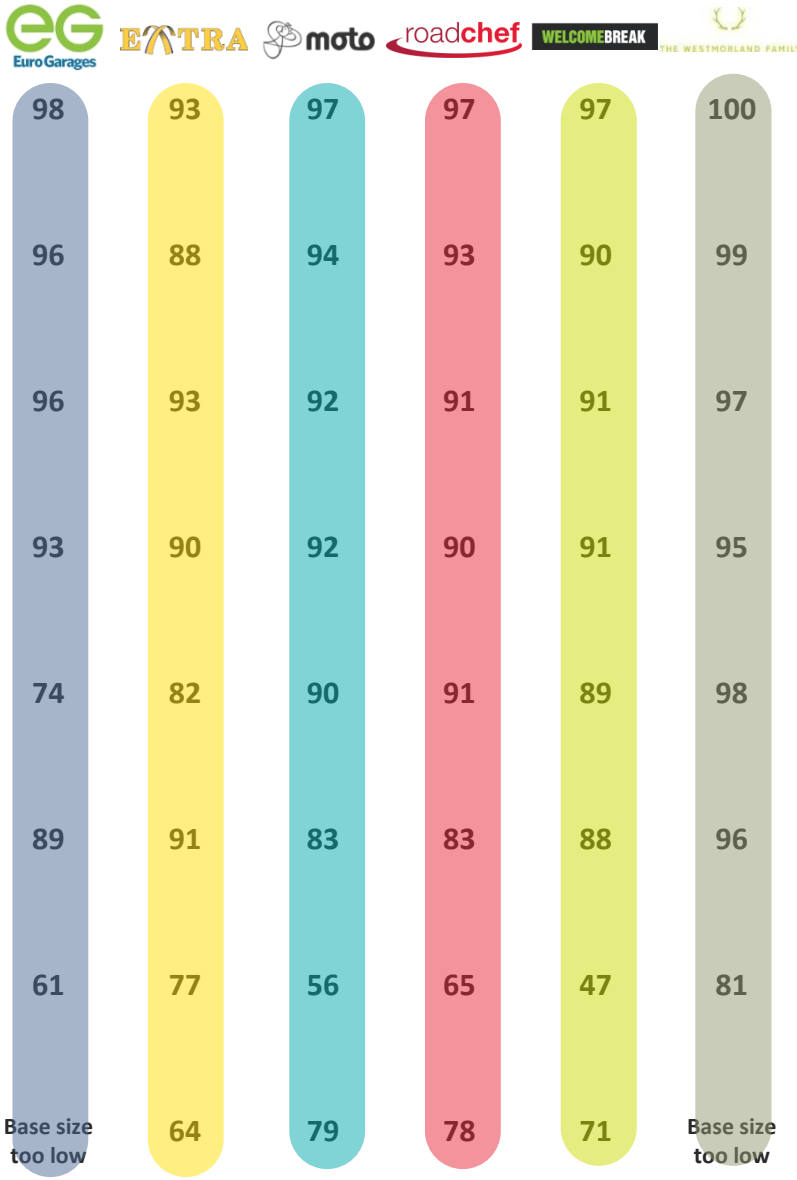
Rating of aspects used [2]

Food and drink bought to eat in: all MSAs (%)

52% of visitors did this (2019)



2019 operator scores – good (%)



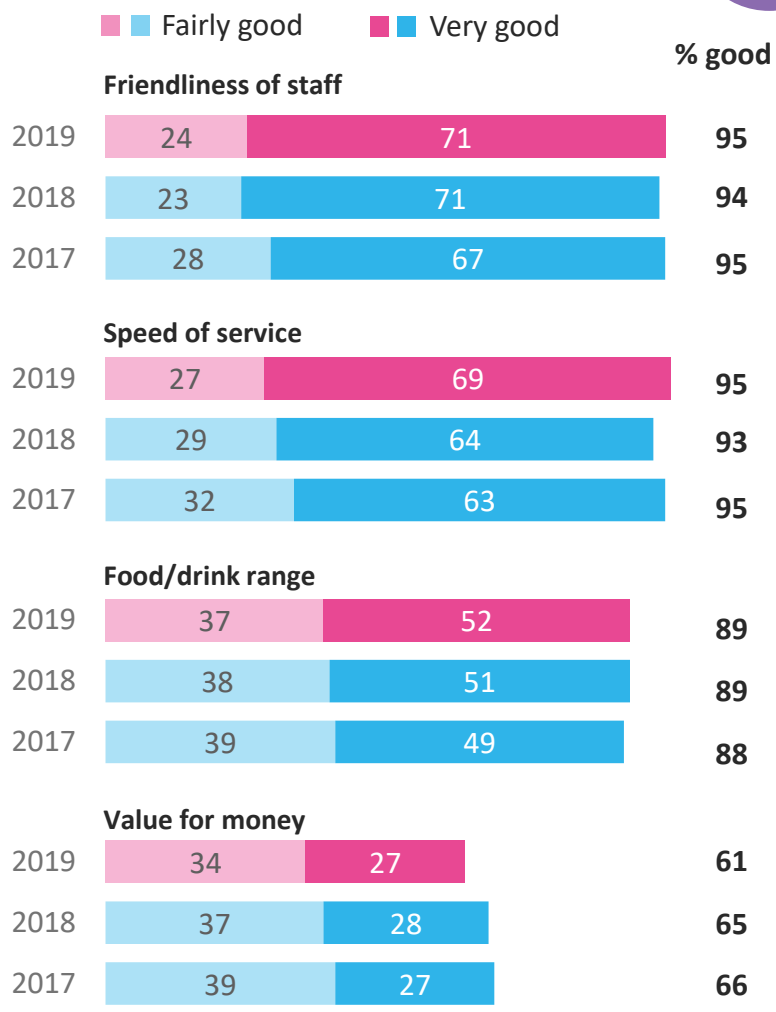
Q16. You said that you did... Please rate using the scale below.

Base 2019/2018/2017: Total: 6027;4943; 4233. EuroGarages: 84. Extra: 373 Moto: 2517 Roadchef: 1362 Welcome Break: 1416 Westmorland: 275.
Note base for quality of WiFi much less.

Rating of aspects used [3]

Food/drink bought to have in car – all MSAs (%)

20% of visitors did this (2019)



2019 operator scores – good (%)

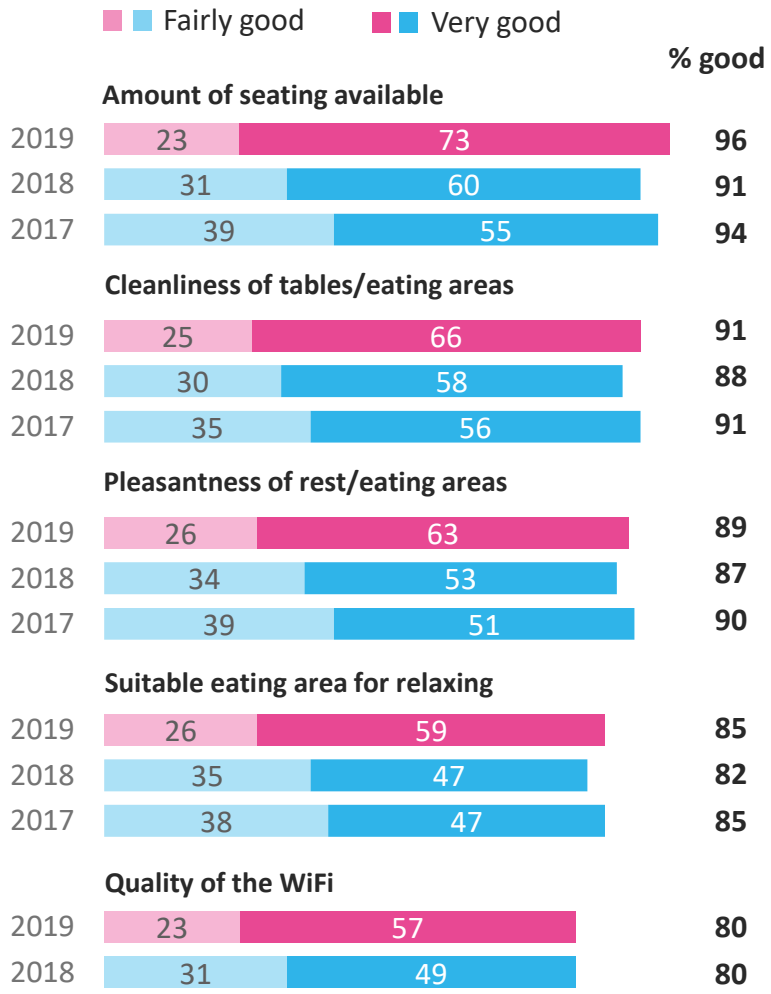
Q16. You said that you did ..... Please rate using the scale below

Base 2019/2018/2017: 2237; 2049; 2464. EuroGarages: base size too low [46]. Extra: 132 Moto: 927 Roadchef: 415 Welcome Break: 635 Westmorland: 82

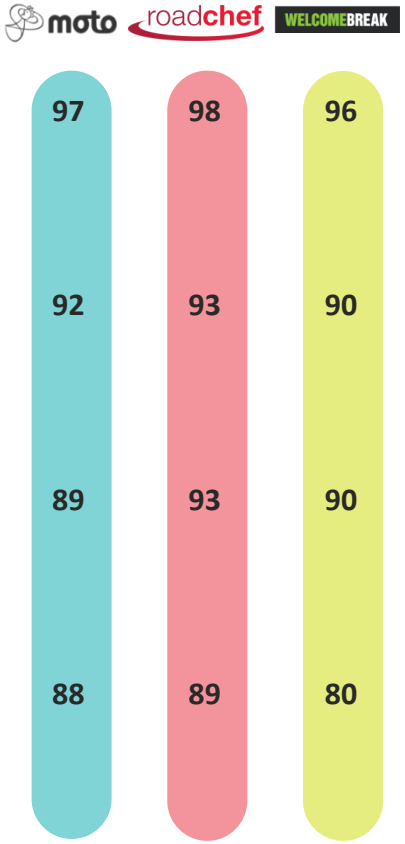
Rating of aspects used [4]

Rest / own food and drink – all MSAs (%)

8% of visitors did this (2019)



2019 operator scores – good (%)



Quality of Wi-Fi: base size too low

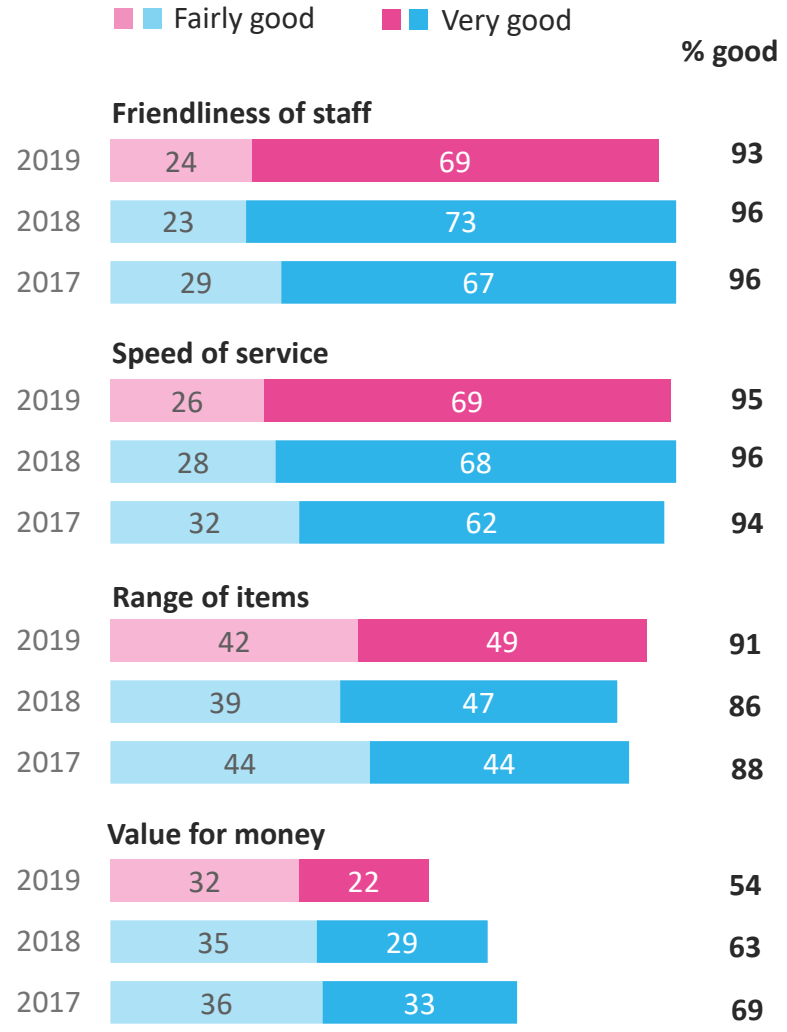
Q16. You said that you did ..... Please rate using the scale below.

Base 2019/2018/2017: 830; 459; 367. Moto: 320 Roadchef: 201 Welcome Break: 220 Low base: EuroGarages [8]; Extra [48]; Westmorland [33].

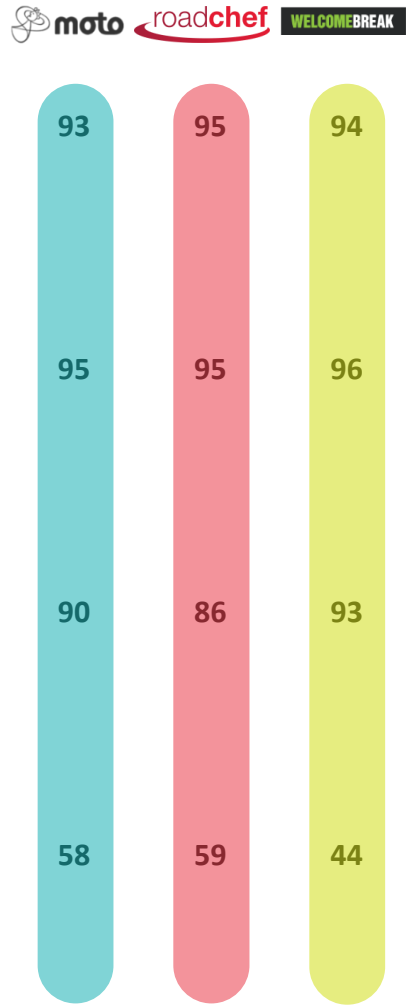
Rating of aspects used [5]

Bought convenience items – all MSAs (%)

9% of visitors did this (2019)



2019 operator scores – good (%)



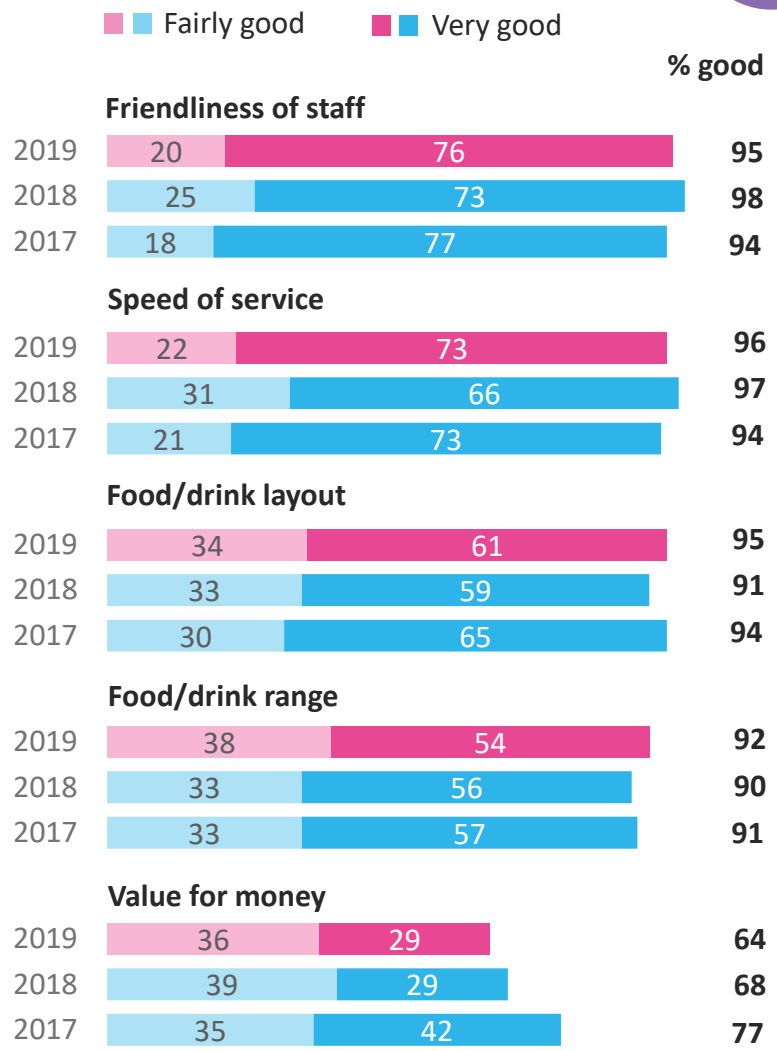
Q16. You said that you did..... Please rate using the scale below.

Base 2019/2018/2017: 978; 954; 1069. Moto: 386 Roadchef: 180 Welcome Break: 332 Low base sizes: EuroGarages [14]; Extra [46]; Westmorland: [31].

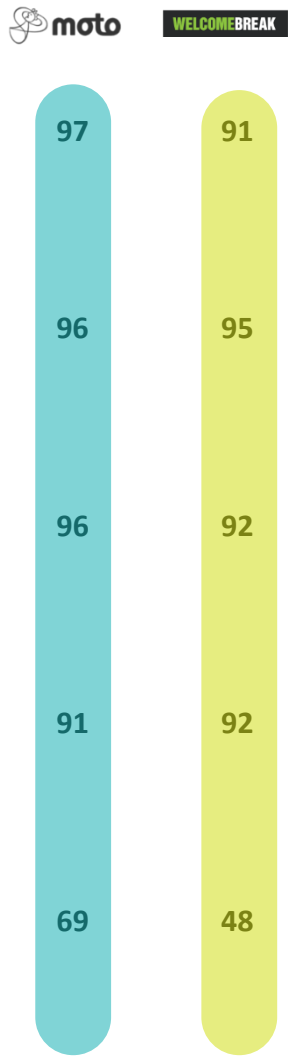
Rating of aspects used [4]

Bought grocery shopping – all MSAs (%)

4% of visitors did this (2019)



2019 operator scores - good (%)

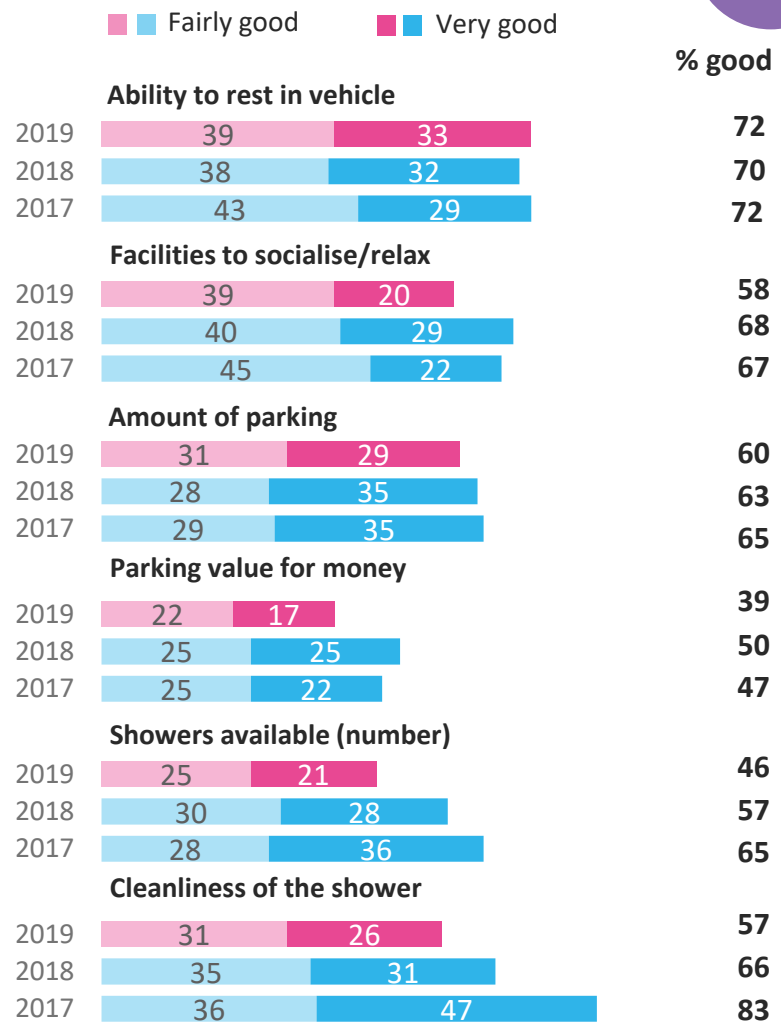


Q16. You said that you did ..... Please rate using the scale below

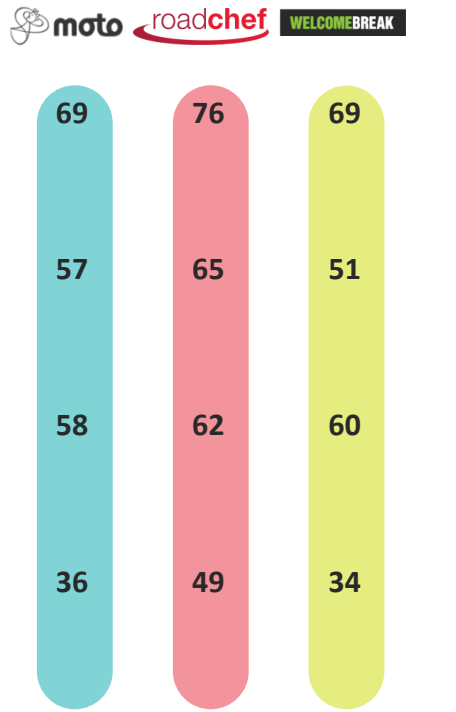
Base 2019/2018/2017: 496; 367; 410. Moto: 235 Welcome Break: 111. Low base sizes: EuroGarages [5]; Extra [31] Roadchef [39] Westmorland [75]

Rating of aspects used [6]

HGV specific facilities – all MSAs (%)



2019 operator scores - good (%)



Showers available: base sizes too low

Cleanliness of showers: bases size too low

Q16. You said that you did .....Please rate using the scale below

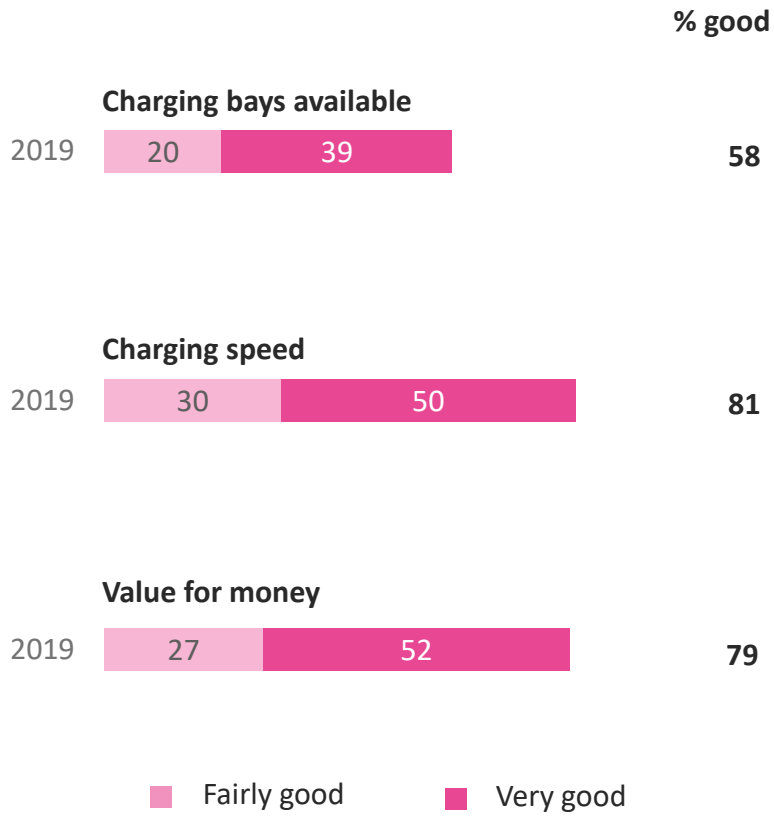
Base left charts: 2019/2018/2017: Rest in vehicle: 615; 263; 447. Facilities to relax: 799; 342; 546 . Amount of parking: 1044; 415; 750. Parking VFM: 519; 274; 448. Showers available: 408; 64; 72. Shower cleanliness: 393; 62; 72.

Base right charts: Moto; Roadchef; Welcome Break (2019): Rest in vehicle: 252; 121; 177. Facilities to relax: 315; 166; 234. Amount of parking: 435; 211; 288. Parking VFM: 206; 109; 157. Showers available: 162; 92; 120. Shower cleanliness: 153; 89; 117.

Rating of aspects used [7]

Charged electric vehicles – all MSAs (%)

1% of visitors did this (2019)



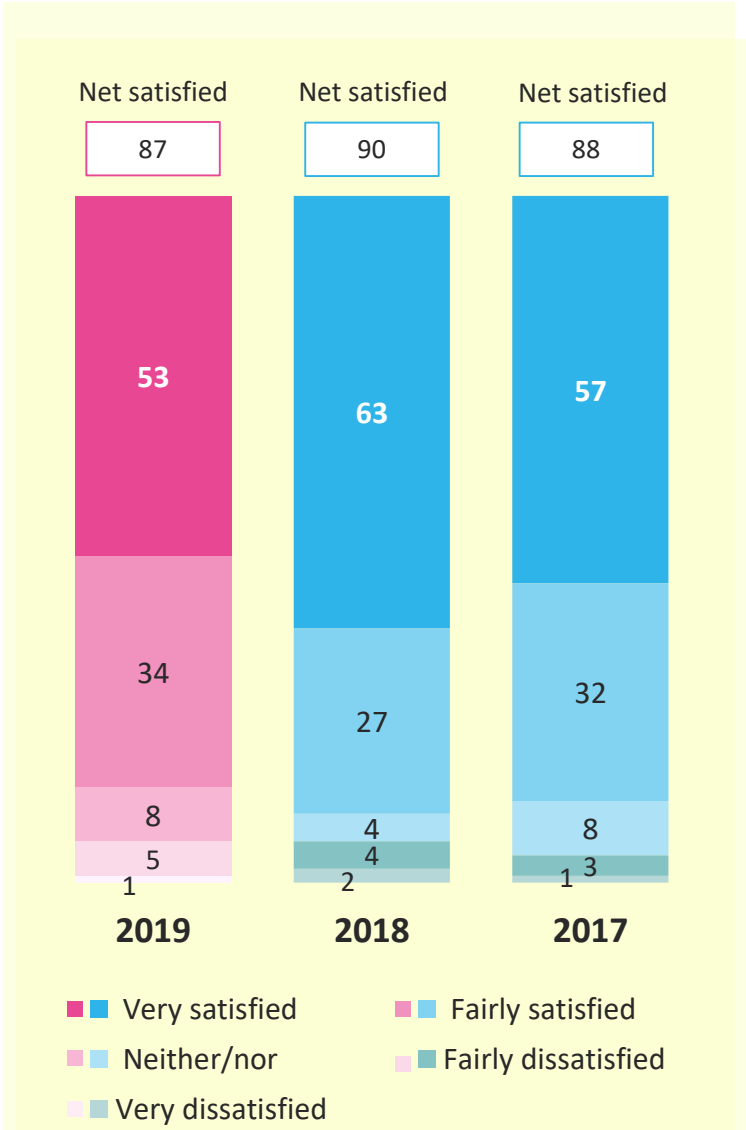
- No data available for operators due to low base sizes
- Base size not large enough for 2018, question not asked in 2017

Q16. You said that you [insert relevant attribute set}. Please rate using the scale below

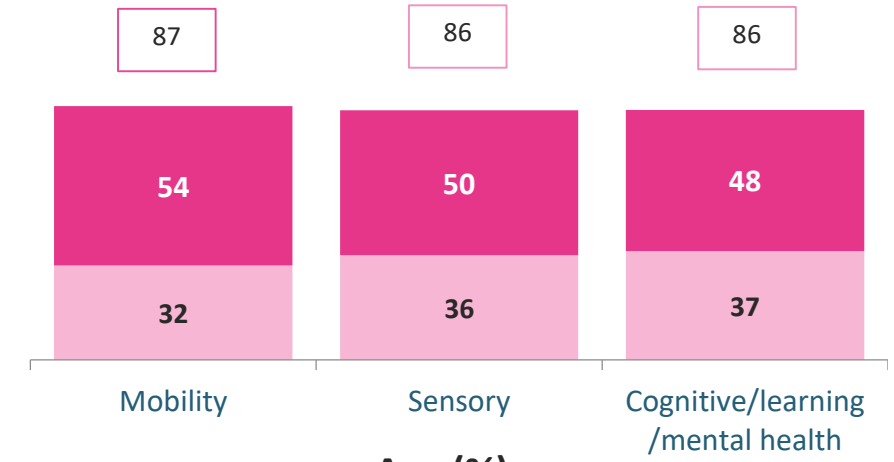
Base (2019/2018/2017): All MSAs (83-81)

Overall satisfaction of disabled visitors

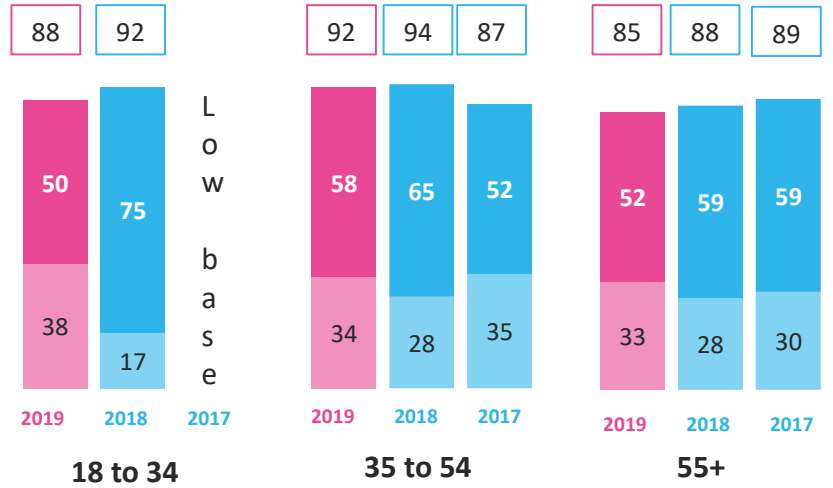
All MSA (%)



By disability type (% 2019 only)



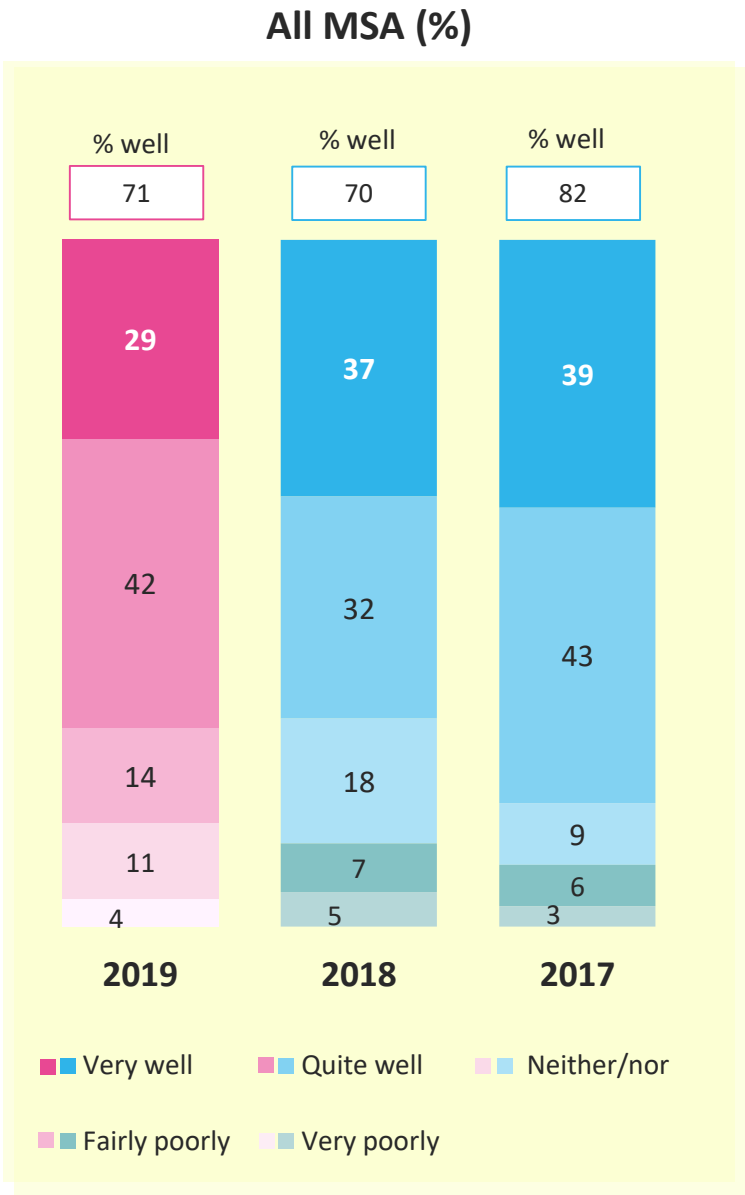
Age (%)

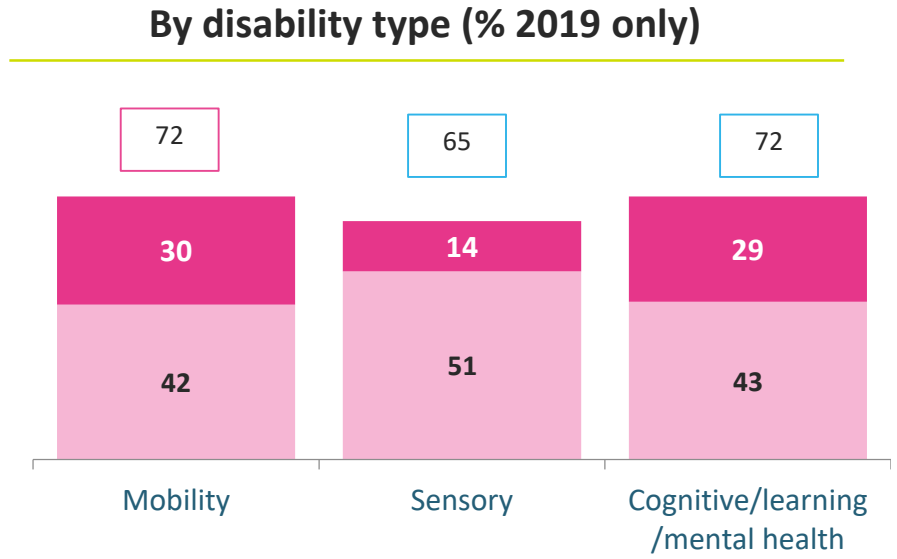


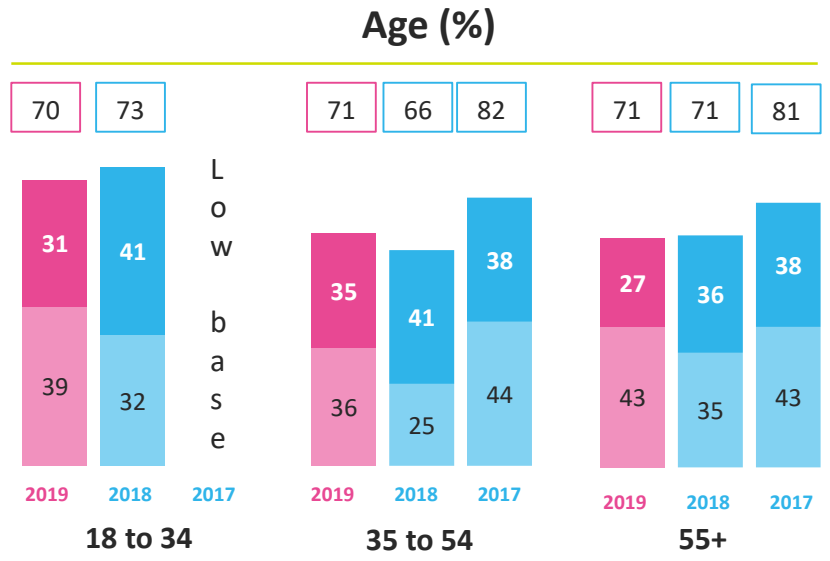
Q7 Overall, how satisfied are you with your experience at these Motorway services today?

Base: (2019/2018/2017) Age: 18-34 (51/63/45), 35-54 (170/153/140), 55+ (538/343/329), Mobility 596, Sensory 69, Cognitive/learning/mental health 91

How well MSAs catered for users' impairments





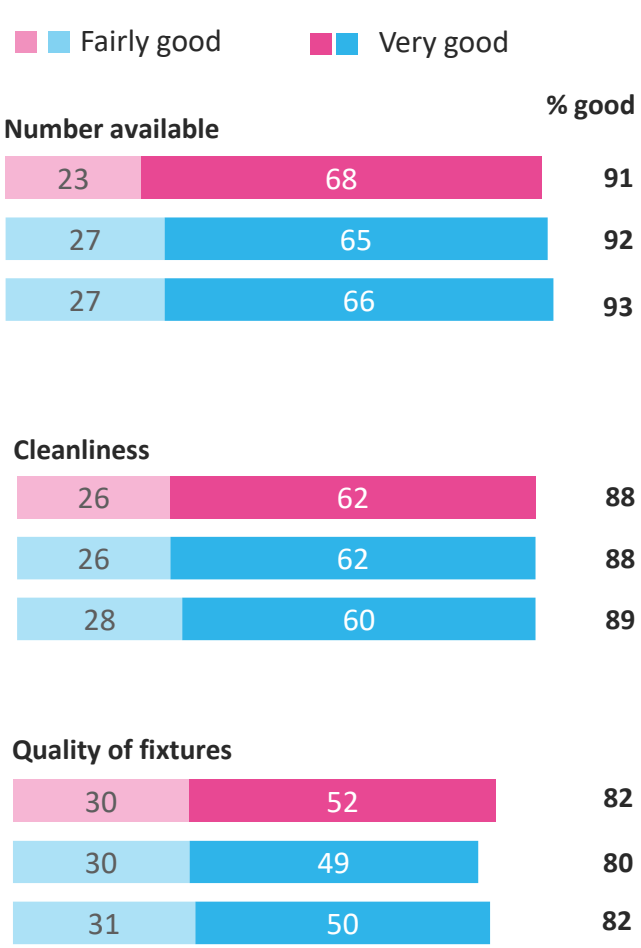


Q26. How well do you think these Services catered for that impairment? Base (2019, 2018, 2017): Overall MSA (742/541/467), 18-34 (51/60/37), 35-54 (162/143/134), 55+ (527/332/293), Mobility 589, Sensory 66, Cognitive/learning/mental health 85

Visitors who are disabled [3]

Toilets – all MSAs (%)

69% of disabled visitors used (2019)



Spontaneous comments

"There were only 2 disabled toilets available and one was out of order"
Leisure, Roadchef

"I couldn't find the disabled toilets at first until we were given a key after asking. Then we queued to use them as there are only two"
Leisure, Moto

"The disabled facilities could be improved by having a disabled toilet with a ramp at both ends of the building. And the steps are ancient"
Leisure, Moto

" There are not enough disabled toilets. Also, the baby changing needs to be separate from the disabled toilets. There was a long queue"
Leisure, Extra

" There needs to be more care and consideration for disabled people, door access to the main building, radar keys for the toilets and better positioning of disabled parking spaces"
Commuter, Welcome Break

Q16. You said that you [insert relevant attribute set}. Please rate using the scale below

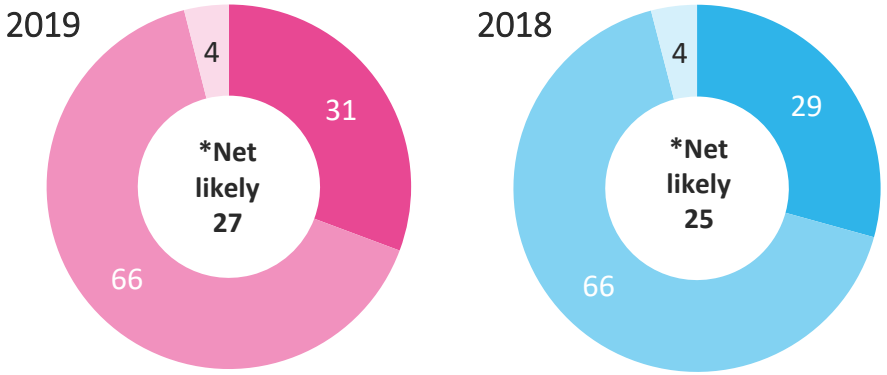
Base (2019/2018/2017): All MSAs (526/440/417)

View on revisiting & spontaneous MSA comments

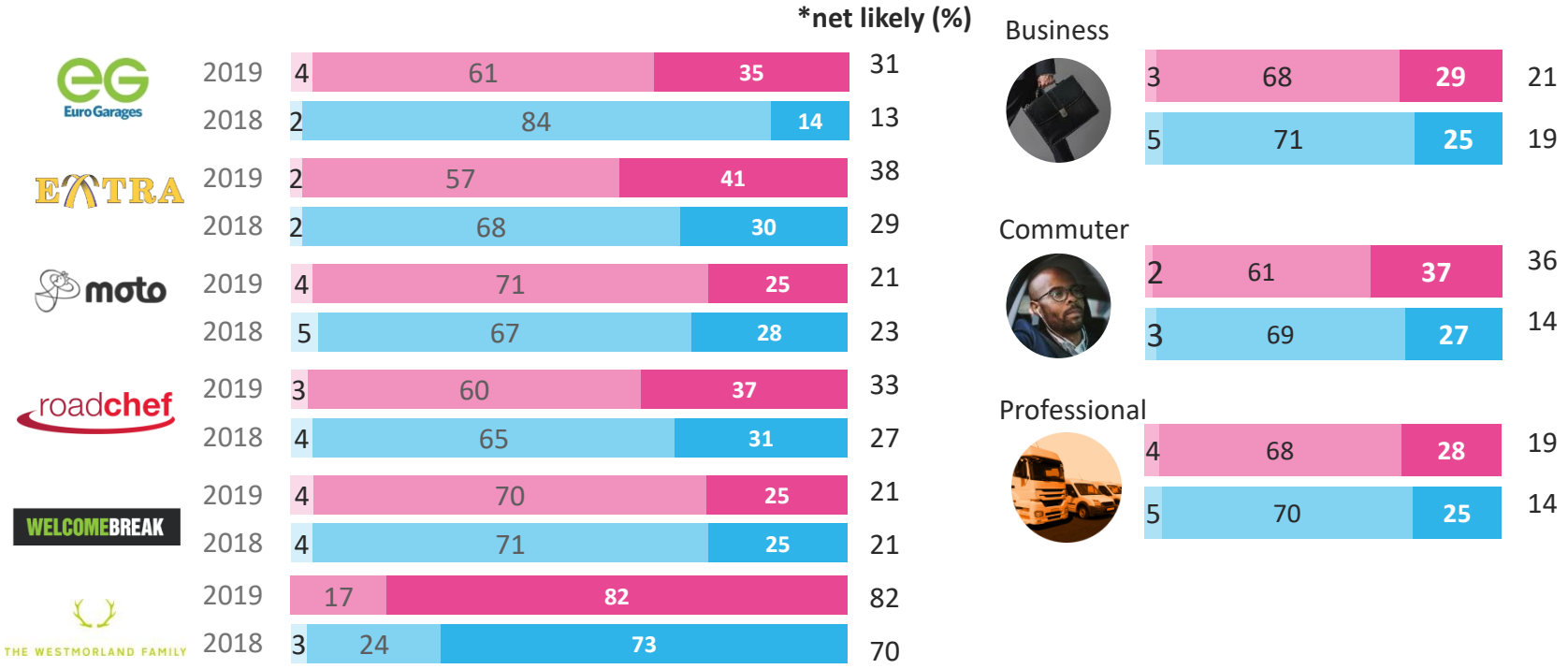
View on revisiting

All MSAs – total (%)

* net of 'more likely' subtract 'less likely.



All MSAs – by visitor type



Q18. Were you to make a similar journey to today, will your experience today make you…?

Base (2019/2019/2017): Euro Garages (186/176), Extra (647/516), Moto (4,698/3,901), Roadchef (2,418/2,006), Welcome Break (3,194/2697), Westmorland (466/360). Leisure (7,275/6.261), Business (2,494/1,749), Commuter (586/634), Professional (1,254/982).

View on revisiting by MSA

Net of 'more likely' subtract 'less likely to choose that MSA over one nearby

Motorway service area	2019	2018
Baldock	35	30
Beaconsfield	32	35
Birch EB	14	9
Birch WB	37	11
Birchanger Green	27	16
Blackburn with Darwen	60	2
Blyth	4	31
Bridgwater	25	12
Burton-in-Kendal	13	28
Burtonwood	1	19
Charnock Richard NB	9	19
Charnock Richard SB	28	14
Cherwell Valley	22	40
Chester	50	44
Chieveley	10	12
Clacket Lane EB	19	18
Clacket Lane WB	31	41
Cobham	44	30
Corley NB	20	55
Corley SB	23	34
Cullompton	19	32
Doncaster North	40	57
Donington Park	29	53

Motorway service area	2019	2018
Durham	23	18
Exeter	40	35
Ferrybridge	15	25
Fleet NB	1	47
Fleet SB	10	35
Frankley NB	21	58
Frankley SB	23	7
Gloucester NB	89	84
Gloucester SB	73	78
Gordano	14	28
Hartshead M EB	5	8
Hartshead M WB	5	13
Heston EB	43	33
Heston WB	50	49
Hilton Park NB	10	19
Hilton Park SB	12	2
Hopwood Park	39	37
Keele NB	13	9
Keele SB	8	7
Killington Lake	14	29
Knutsford NB	7	0
Knutsford SB	10	14

Motorway service area	2019	2018
Lancaster NB	17	6
Lancaster SB	16	10
Leicester Forest E NB	13	7
Leicester Forest E SB	16	5
Leigh Delamere EB	34	23
Leigh Delamere WB	25	15
London Gateway	27	13
Maidstone	22	10
Medway EB	32	34
Medway WB	12	20
Membury EB	6	12
Membury WB	10	5
Michaelwood NB	27	13
Michaelwood SB	4	29
Newport Pagnell NB	27	8
Newport Pagnell SB	34	13
Northampton NB	73	27
Northampton SB	75	32
Norton Canes	72	71
Oxford	40	33
Pease Pottage	7	4
Peterborough	40	42
Reading EB	36	39

Motorway service area	2019	2018
Reading WB	37	57
Rivington NB	21	17
Rivington SB	41	8
Rownhams NB	4	12
Rownhams SB	20	26
Sandbach NB	34	23
Sandbach SB	38	21
Sedgemoor NB	20	30
Sedgemoor SB	43	38
Severn View	2	20
South Mimms	63	14
Southwaite NB	14	30
Southwaite SB	5	5
Stafford NB	24	14
Stafford SB	41	40
Strensham NB	22	4
Strensham SB	32	23
Tamworth	15	87
Taunton D NB	52	27
Taunton D SB	25	24
Tebay NB	84	57

Motorway service Area	2019	2018
Tebay SB	82	61
Telford	25	16
Thurrock	18	9
Tibshelf NB	14	38
Tibshelf SB	13	17
Toddington NB	27	1
Toddington SB	41	-3
Trowell NB	5	18
Trowell SB	8	31
Warwick NB	50	25
Warwick SB	58	28
Washington NB	15	19
Washington SB	29	17
Watford Gap NB	20	21
Watford Gap SB	34	20
Wetherby	36	4
Winchester NB	11	26
Winchester SB	32	13
Woodall NB	7	33
Woodall SB	22	17
Woolley E NB	1	13
Woolley E SB	17	44

Euro Garages | Extra | Moto | Roadchef | Welcome Break | Westmorland

Q18. Were you to make a similar journey to today, will your experience today make you…?

Positive comments around MSAs

"There's loads of space and friendly staff"
Leisure, Euro Garages

"We are so familiar with Moto it was like I was coming home. I felt confident and secure coming in"
Leisure, Moto

"It's excellent friendly service and there's plenty of food"
Professional, Extra

"It's very well run. Clean toilets, friendly staff and a good ambience"
Leisure, Welcome Break

"There's something to suit all types of people. It's very clean. The staff are always around clearing tables"
Leisure, Roadchef

"There's a good selection of foods. Good alternatives , nice healthy options and burgers if people want them"
Leisure, Roadchef

"It's a nice touch to have fresh flowers in the toilets and they also smelled very nice"
Business, Moto

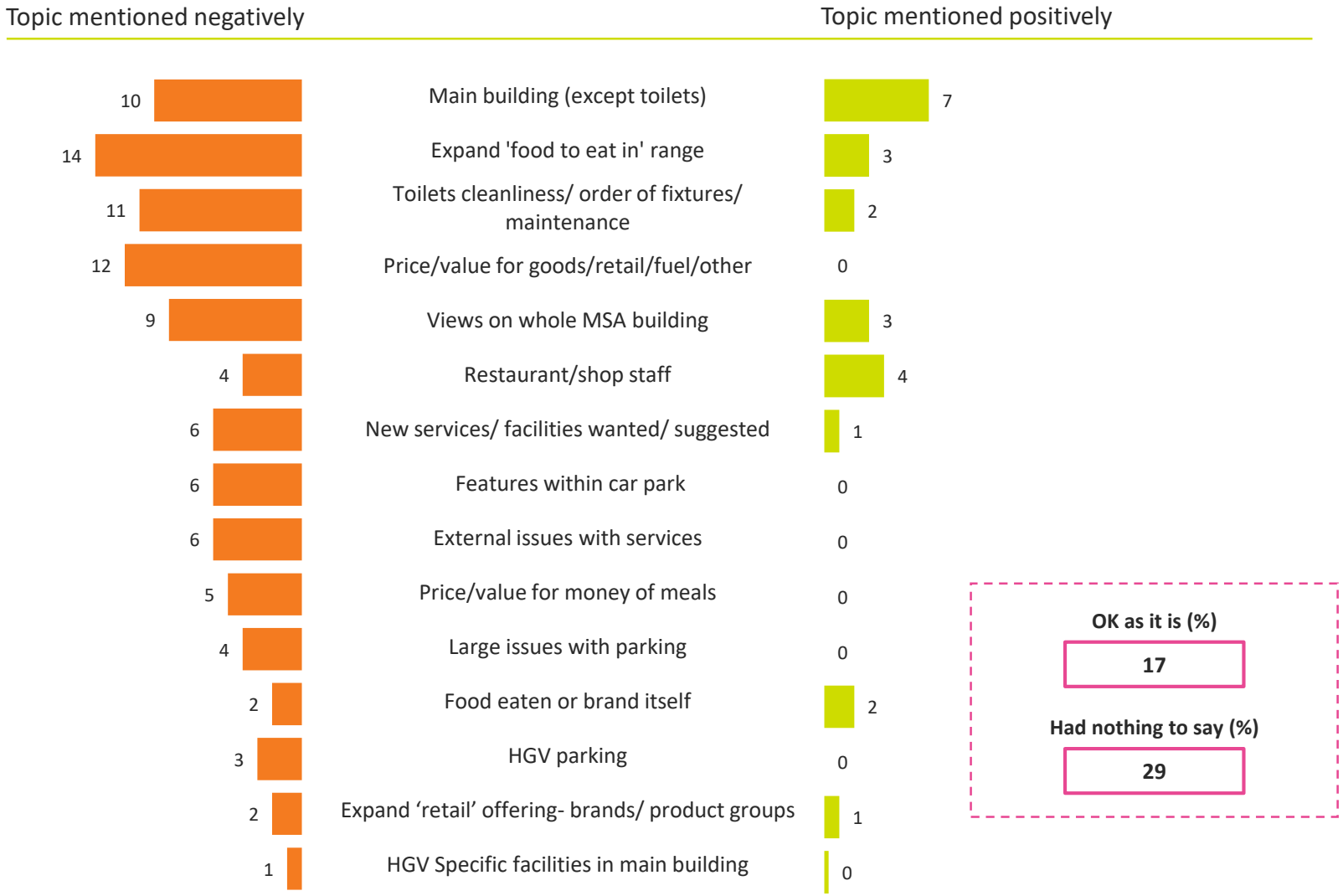
" It's so different from other services. Clean and friendly with excellent food"
Leisure, Westmorland

"The food outlets are great, and I like the way the building blends into the landscape"
Business, Westmorland

Q17. What would you like to tell those who run these Motorway Services? This could be something you liked or disliked, something that could be improved or something that you wanted but couldn't find.

Comments about the MSAs

Proportion of the topics of comments made (%)



Q.17 What would you like to tell those who run these Motorway Services? This could be something you liked or disliked, something that could be improved or something that you wanted but couldn't find.

Base: All MSAs (6,214)

Comments about the MSAs

Main building (except toilets)

"When the doors are open in cold weather it can get cold inside. So both doors should not be open at the same time"
Commuter, Extra

"More seating is needed, but when it's busy they do keep it very pleasant. Also Starbucks is too expensive"
Professional, Welcome Break

"The balcony as you leave the room smells from the cooking like burnt food. Also the disabled parking should be closer to the door "
Leisure, Moto

"It's cold in here it makes me feel tired and not want to stay long. I would also like more healthy food options like bagels"
Leisure, Welcome Break

Expand 'food to eat in' range

"It needs more variety in terms of food items. You don't always necessarily want McDonald's or a bar of chocolate"
Business, Roadchef

"Please provide a wider selection of food. More healthy options and less fast food"
Professional, Moto

"There should be a food outlet where you can buy healthy eating options with your coffee!"
Business, Moto

"The food choices could be improved for hungry travellers. And better value for money would bring more bums on seats"
Business, Roadchef

Toilets cleanliness/ order of fixtures/ maintenance

"We used the family room for nappies and it wasn't very clean, it was old and grotty"
Leisure, Moto

"The *toilets could be given a refurbish. They are just old and tired. But the amount of retail outlets here is good."*
Leisure, Moto

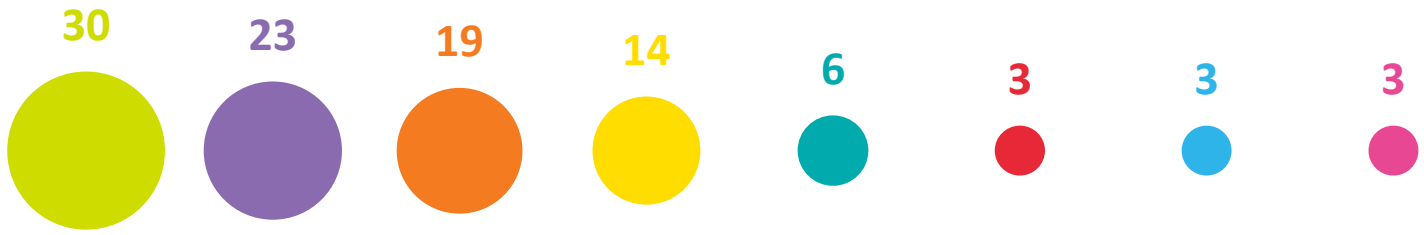
"The showers need better lighting and a cleaner floor. There is also a lack of coat hooks and it's rather expensive to park over night"
Professional, Extra

"The ladies toilets were fine but my husband says the men's toilets are filthy. Behind the taps, the cubicle doors and the floors all need a good clean. We stop here a lot and although the toilets have been refurbished the cleanliness has deteriorated"
Leisure, Moto

Q.17 What would you like to tell those who run these Motorway Services? This could be something you liked or disliked, something that could be improved or something that you wanted but couldn't find.

Factors influencing overall satisfaction

All MSA users



Food/drinks quality	6%
Food/drinks range	5%
Cleanliness of table	3%
The value for money	3%
Friendliness/helpfulness of the staff	2%
Speed of service	2%
Enough space/seating being available	1%
Facilities here for relaxing/socialising	1%
Value for money of the parking	1%
Rest/sleep in your vehicle	1%

Impression of building inside	18%
Impression of building outside	12%
Walk from car to building	4%
Road surface quality in MSA	3%
Safety of leaving vehicle	3%
Layout of parking area	2%
Clarity of approach signs	1%
Getting from slip road to parked	1%
Speed of service	1%
Range of items in the shop	1%

Quality of the toilet area	7%
Cleanliness of toilet facilities	6%
Number of toilets available	6%
Food/drinks range	2%
Value for money	2%
Speed of service	1%
Friendliness/helpfulness of staff	1%
Suitable area for relaxing	1%
Pleasant rest/eating area	1%
Cleanliness of table	1%

*Importance scores for one or more features within these categories is/are rounded to zero. Whilst it/they record some negligible importance they are not shown for this reason

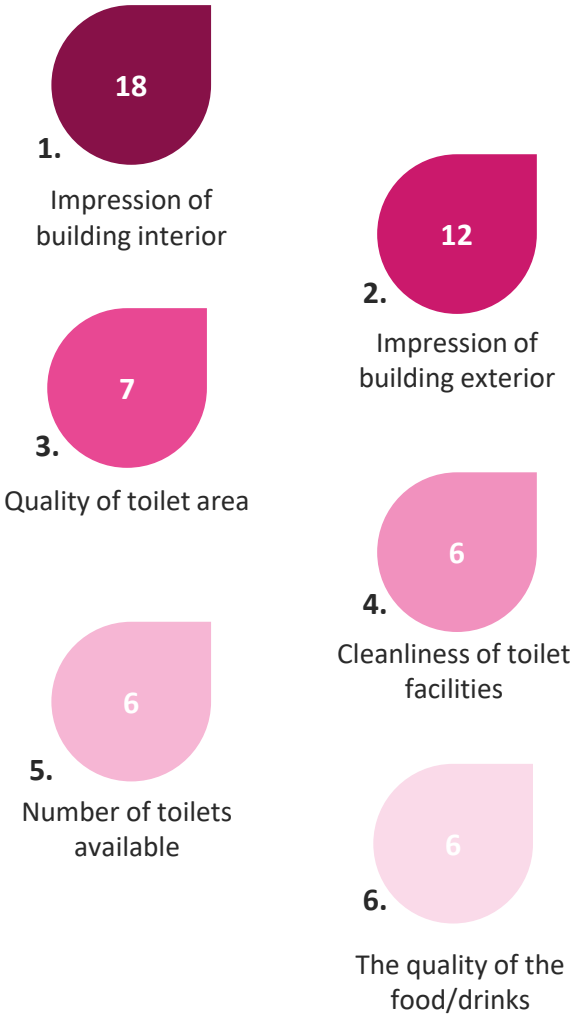
Based on full satisfaction scale – all who have done each (n=7,772-393).

R squared = 44%

Prioritising improvement (ratings vs. importance)

All MSA users

Top 6 key drivers (% driving satisfaction)



Satisfaction with the key drivers

% good

2019		2018
83	Impression of building interior	83
79	Impression of building exterior	80
82	Quality of toilet area	81
89	Cleanliness of toilet facilities	89
93	Number of toilets available	92
91	The quality of the food/ drinks	91

Based on full satisfaction scale – all who have done each (n=7,772-393).
R squared = 44%

Factors influencing overall satisfaction

HGV users only

Facilities here for relaxing/socialising	7%
Rest/sleep in your vehicle	7%
Value for money of the parking	6%
HGV parking spaces available	4%
Number of showers available	4%
Cleanliness of the shower area	3%
Impression of building inside	15%
Impression of building outside	13%

Safety of leaving vehicle	7%
Walk from car to building	4%
Layout of parking area	3%
Road surface quality in MSA	3%
Clarity of approach signs	1%
Value for money	3%
Food/drinks range	1%
Speed of service	1%
Area for relaxing	1%

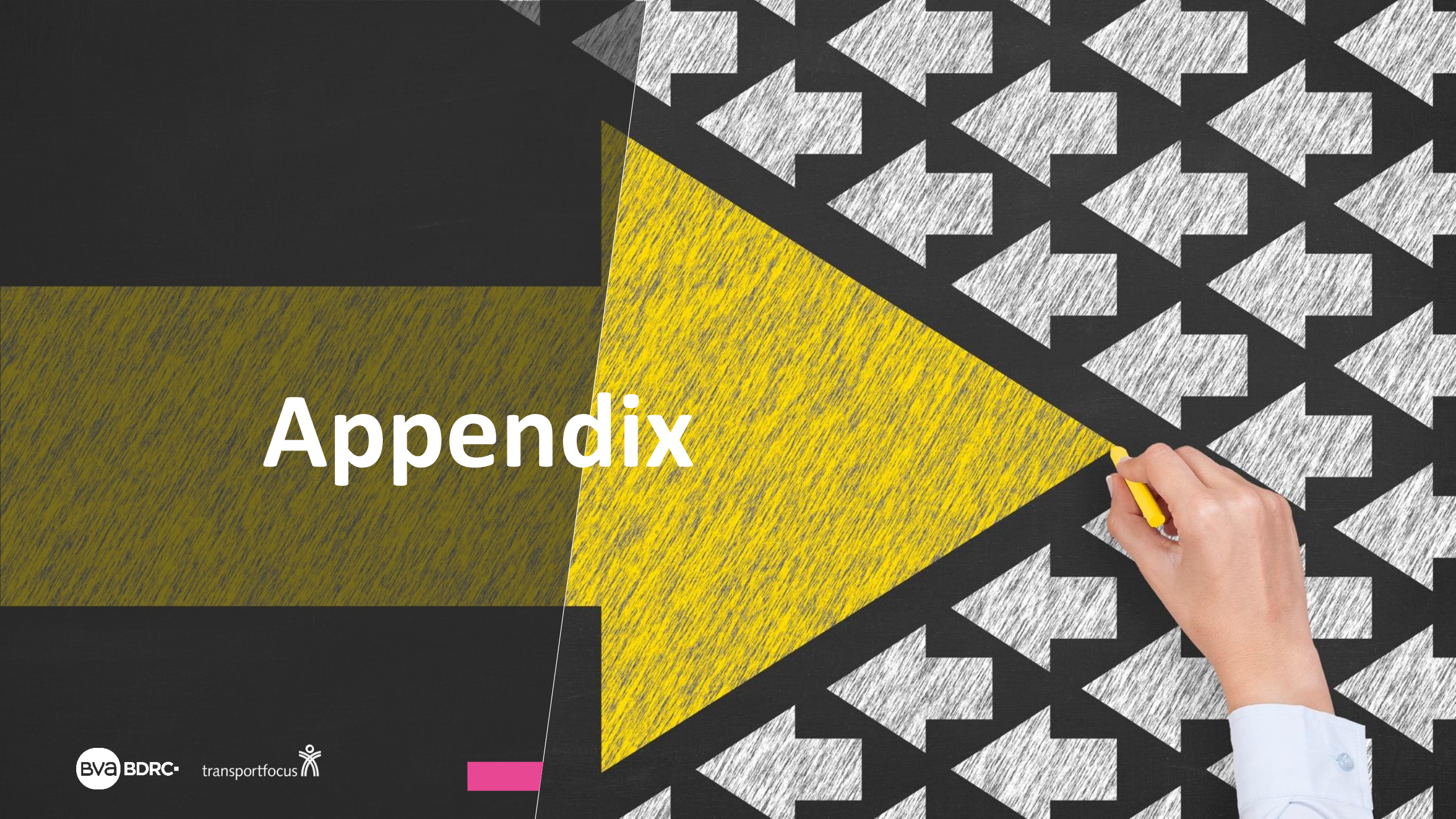
Food/drinks range	2%
Food/drinks quality	2%
Cleanliness of table	1%
Friendliness/helpfulness of the staff	1%
Quality of the toilet area	3%
Cleanliness of toilet facilities	2%
Number of toilets available	2%
Range of items	1%

*Importance scores for one or more features within these categories is/are rounded to zero. Whilst it/they record some negligible importance they are not shown for this reason

Based on full satisfaction scale – all who have done each (n=1,044-393).

R squared = 45%

Appendix



Number of responses per MSA in each survey year

Motorway Service Area	2019	2018	2017
Baldock	**128**	81	81
Beaconsfield	**108**	80	75
Birch EB	**88**	89	82
Birch WB	**97**	89	86
Birchanger Green	**123**	83	80
Blackburn with Darwen	**104**	81	72
Blyth	**112**	84	73
Bridgwater	**91**	94	77
Burton-in-Kendal	**122**	78	79
Burtonwood	**97**	85	61
Charnock Richard NB	**103**	91	77
Charnock Richard SB	**100**	87	84
Cherwell Valley	**87**	80	83
Chester	**98**	93	81
Chieveley	**90**	95	81
Clacket Lane EB	**107**	92	57
Clacket Lane WB	**101**	90	66
Cobham	**120**	86	78
Corley NB	**95**	86	79
Corley SB	**110**	90	80
Cullompton	**96**	84	63
Doncaster North	**127**	89	71
Donington Park	**95**	78	81

Motorway Service Area	2019	2018	2017
Durham	**113**	80	109
Exeter	**138**	93	87
Ferrybridge	**100**	83	70
Fleet NB	**112**	91	115
Fleet SB	**113**	101	40
Frankley NB	**96**	91	83
Frankley SB	**91**	90	85
Gloucester NB	**122**	93	76
Gloucester SB	**132**	90	87
Gordano	**93**	93	75
Hartshead Moor EB	**104**	76	67
Hartshead Moor WB	**111**	76	89
Heston EB	**120**	102	69
Heston WB	**113**	79	68
Hilton Park NB	**102**	85	80
Hilton Park SB	**86**	82	78
Hopwood Park	**94**	79	80
Keele NB	**87**	90	75
Keele SB	**90**	81	74
Killington Lake	**111**	83	81
Knutsford NB	**104**	85	87
Knutsford SB	**104**	91	77
Lancaster NB	**101**	81	71

Motorway Service Area	2019	2018	2017
Lancaster SB	**111**	87	80
Leicester Forest East NB	**89**	72	71
Leicester Forest East SB	**90**	82	82
Leigh Delamere EB	**121**	93	78
Leigh Delamere WB	**107**	91	88
London Gateway	**114**	80	68
Maidstone	**92**	92	58
Medway EB	**101**	100	60
Medway WB	**111**	70	51
Membury EB	**105**	86	71
Membury WB	**105**	79	81
Michaelwood NB	**104**	85	82
Michaelwood SB	**92**	90	86
Newport Pagnell NB	**114**	89	76
Newport Pagnell SB	**103**	84	75
Northampton NB	**103**	90	75
Northampton SB	**99**	90	81
Norton Canes	**93**	83	80
Oxford	**119**	92	68
Pease Pottage	**115**	80	74
Peterborough	**91**	104	84
Reading EB	**120**	92	83
Reading WB	**119**	90	82

Euro Garages Extra Moto Roadchef Welcome Break Westmorland

Number of responses per MSA in each survey year

Motorway Service Area	2019	2018	2017
Rivington NB	95	86	72
Rivington SB	91	90	78
Rownhams NB	98	84	79
Rownhams SB	94	82	83
Sandbach NB	103	91	90
Sandbach SB	98	77	68
Sedgemoor NB	113	96	86
Sedgemoor SB	122	98	90
Severn View	92	93	59
South Mimms	107	79	82
Southwaite NB	111	87	70
Southwaite SB	106	81	90
Stafford NB	87	87	92
Stafford SB	106	90	60
Strensham NB	116	92	80
Strensham SB	113	90	80
Tamworth	105	91	80
Taunton Deane NB	112	93	94
Taunton Deane SB	133	85	84
Tebay NB	101	90	90
Tebay SB	111	87	87

Motorway Service Area	2019	2018	2017
Telford	88	90	80
Thurrock	98	85	74
Tibshelf NB	114	85	79
Tibshelf SB	104	82	67
Toddington NB	113	87	80
Toddington SB	91	94	83
Trowell NB	111	87	87
Trowell SB	105	85	83
Warwick NB	102	92	80
Warwick SB	113	87	79
Washington NB	92	86	88
Washington SB	93	82	94
Watford Gap NB	90	85	74
Watford Gap SB	98	79	71
Wetherby	102	90	81
Winchester NB	102	74	79
Winchester SB	114	77	72
Woodall NB	104	83	75
Woodall SB	100	92	73
Woolley Edge NB	98	88	56
Woolley Edge SB	109	86	70

Total number of survey responses

2019	2018	2017
11,609	9,626	8,623

Average number of survey responses per MSA

2019	2018	2017
105	87	77

Euro Garages Extra Moto Roadchef Welcome Break Westmorland

Quality/ accreditation (ISO, etc)

BVA BDRC is certified to ISO 20252 and 27001, the recognised international quality standards for market research and information security. The project has been carried out in accordance with these standards.

- Adherence to the standard is independently audited once per year.
- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence to ISO 20252 and 27001.

All work will be carried out in conformity to these standards, the MRS Code of Conduct, and all relevant legal requirements

Full methodological details relevant to the project, are available upon request.