

Roadside facilities research

Research debrief

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Background, objectives and methodology

Background

- Highways England (HE) manages England's motorways and trunk roads, known as the Strategic Road Network (SRN), on behalf of the Department for Transport (DfT). Since April 2015 Transport Focus has had responsibility for representing the interests of road users using the SRN in England.
- Previous research conducted by Transport Focus with car, van, motorcycle and truck drivers shows that truck drivers, in particular, are concerned about the lack of appropriate facilities alongside the SRN. Availability of suitable spaces at motorway service areas (MSAs) is often limited, as are truck stops on other roads, forcing HGVs into using lay-bys. This brings with it a lack of facilities as well as security concerns. Furthermore, having appropriate rest periods is important for driver safety and there are legal obligations for these drivers to rest. Other drivers have concerns about the quality, cost and facilities available at MSAs, including access for disabled motorists and passengers.
- Research was needed for Transport Focus to follow up on the concerns identified with a more detailed examination of the needs and experiences of SRN users in terms of roadside facilities – including reasons for non-use.
- They also wanted to understand road users' views on the role of roadside facilities in providing sufficient opportunity for rest and recuperation – and therefore concentration and safety when driving.





Objectives

- The ultimate objective of the project is to develop Transport Focus' understanding of road users' needs and experiences of roadside facilities on the Strategic Road Network in England, including their motivation for using, or not using, the range of facilities available. Other objectives include:
 - Provide a comprehensive understanding of road users' needs, perceptions and expectations of roadside facilities
 - Investigate the degree of pre-planning, if any, of the availability and use of facilities and how this is undertaken, including the usefulness of signage from motorways and trunk roads
 - Examine the rationale behind the choice of facilities used (or not used) whether these be designated motorway service areas, truck stops or rest areas; or whether they be petrol stations, transport cafés, laybys or 'burger bars' alongside major trunk roads. It will also be useful to glean some information on whether SRN users seek facilities that require a detour, such as supermarkets or pubs
 - Gain an in-depth understanding of the views of different types of users, differing usage requirements (e.g. toilet only or full meal) and demographic profiles
 - Explore users' experiences of the different facility types available e.g. on motorways and major trunk roads, service areas and rest areas, public and privately owned, new and old, high and low customer volume
 - Consider the range of facilities available and desired, including parking, toilets, washrooms/showers, food/drink, fuel, shopping, aesthetics of buildings, leisure/entertainment, rest/sleep and exercise
 - Understand road users' views about the role of roadside facilities in improving road safety by allowing opportunities for rest and recuperation and whether this need is being met
 - Examine perceptions of the number and location of facilities, the draw of brands, the quality of facilities, cleanliness, value for money, as well as awareness of who owns and operates them



Focus groups

- 8 x 90 minute, qualitative **focus groups** amongst professional, business and leisure drivers and passengers
 - 2 x Birmingham
 - 2 x Norwich
 - 2 x St Albans
 - 2 x Newcastle
- Groups contained 8 respondents
- 4 x 90 minute, qualitative groups amongst **HGV drivers**
 - 2 x Birmingham
 - 2 x Ipswich
- Groups contained 8 respondents

Depth interviews

- 12 x 45 minute, qualitative **depth interviews** amongst motorcyclists (leisure, business), coach drivers (professional) and people with disabilities (leisure)
 - 4 x Norwich
 - 4 x St Albans
 - 4 x Newcastle
- **People with disabilities** included primarily those with coordination and mobility impairments
- 6 x 45 minute, qualitative tele-depth interviews with **stakeholders**
 - 2 x road freight/haulage associations
 - 3 x freight operators
 - 1 x trade union

Exit Interviews

- 48 x 10 minute 'in-situ' **exit interviews** among roadside facility (MSA and 'A' road) users
 - All users targeted but respondents were mainly leisure users
- Locations split by range of operators, locations, brands, ownership and age of facility
 - Newmarket, Beacon Hill, Charnock Richard, Sandbach, Beaconsfield, Cherwell Valley, Gloucester, Strensham



Research schedule

- The complete, detailed schedule of focus groups and mini-groups:

LOCATION	GROUP NO	DEMOGRAPHICS	SRN USAGE
Birmingham	1	Younger, shorter journey	Leisure
	2	Older, longer journey	Professional
Norwich	3	Younger, shorter journey	Professional
	4	Older, longer journey	Business
St Albans	5	Younger, shorter journey	Business
	6	Older, longer journey	Leisure
Newcastle	7	Older, shorter journey	Business
	8	Younger, shorter journey	Leisure

LOCATION	GROUP	USAGE
Birmingham	1	HGV
	2	HGV
Ipswich	3	HGV
	4	HGV

Definitions

- Shorter journeys: journeys of 2-3 hours
- Longer journeys: journeys of over 3 hours
- Leisure: drive alone/with partner and families; those who towed caravans. For reporting, we've included motorcyclists and people w/ disability
- Professional: drive as part of their occupation e.g. taxi/delivery services. For reporting, we've included coach drivers
- Business: use the SRN network to drive to business meetings and trips

- HGVs of 7.5+ tonnes
- Driving minimum 20h/week
- Half drivers who overnight on the road
- Journeys of 3+ hours

Context



Roadside facilities in context



For 'non-professional' drivers, roadside facilities are a fairly low salience issue and are evaluated against mostly straightforward and rational criteria



Most of the **discussion of roadside facilities focuses on MSAs**. This is, in part, simply a reflection of the frequency of use of MSAs compared to trunk road facilities. Data from exit interviews shows strong levels of satisfaction across the MSA proposition*



This also reflects the fact that **the MSA offer is coherent, consistent and more or less ubiquitous**. MSA's generally **meet most needs in a consistent and reliable way**



In contrast, **trunk road facilities lack both reliability and consistency and the assurance of core amenities** (and laybys are rarely used / considered for anything other than an emergency stop)



Respondents found it **difficult to define 'A' road services/facilities**, and often spoke of petrol stations and other retail establishments when referring to them



However, there is a clear **divergence of views between those who drive for a living** (HGV road users and professional drivers) **and other road users**



Professional / HGV drivers have both a wider range of needs and a wider repertoire of stopping venues/facilities (more particularly truck stops for HGVs and retail parks for professional drivers, with laybys as a 'necessary evil'). There is also a more emotional dimension to these drivers' views



For all types of driver, issues of congestion, roadworks and the behaviour of other drivers are higher up their list of concerns than roadside facilities

**NB: based on 48 exit interviews*



Roadside facilities in context

The importance ascribed to roadside facilities is contingent on a number of key factors, namely:

	HGV	Professional	Business	Leisure
Frequency	HIGH	HIGH	MEDIUM	LOW
Time urgency	HIGH	HIGH	HIGH	LOW
Complexity of need	HIGH	MED / LOW	LOW	LOW
Financial impact	HIGH	HIGH	LOW	MED / LOW
HIGH ← engagement → LOW				

Executive summary

Leisure: MSAs have improved and provide a reliable and consistent level of service



- Overall, MSAs thought to be **sufficient** in number and intervals along the SRN
- Recognition of **investment** in premises and broad choice of brands
- Drivers **value** the consistency and reliability of the offer



MSA key **strengths** include:

- Sufficient facilities at regular intervals
- Safety and security
- A core, 24 hour service which includes:
 - Toilets
 - Fuel
 - Basic food/drink
- Enhanced offer, including well-known outlets, during commercial hours



"There's plenty of them, generally every trip you go on. If you're running short on fuel or you need to stop for a toilet, you're never usually more than half an hour max from one."
Newcastle, Male

"You have to be desperate to fill your tank up at a service station on the motorway!"
St. Albans, Female

Some **improvements** suggested:

- Prices perceived as higher than non-MSA equivalents (fuel and food)
- Cleanliness (particularly in toilet facilities) variable
- Limited choice of healthy, hot meals
- More green, outdoor areas desired



- Some MSAs abroad seen as cheaper and more modern (particularly by motorcyclists) – e.g. Germany, France and Belgium



Leisure: 'A' road facilities unreliable and lacking in basic amenities, whilst laybys seldom used



- Most find it difficult to give coherent responses because **quality and range** so **variable**
 - On a whole, considered **unpredictable and variable** in terms of opening hours, cleanliness and basic amenities
 - Drivers have a **wider variety to choose from** when stopping on 'A' roads (including retail parks, nearest town, pubs...)
 - **Signage** is often **not very informative**, variable in level of information and confusing (dark, faded, too small)



Trunk road facilities

"Little Chefs are generally atrocious, although sometimes they're ok if there is nothing else; we normally wander into town and avoid them."
St. Albans, Female

"It's got no aspirations of being anything else than what it is, and I have used the toilets before and they're not the best in the world."
'A' road facility, Male

- **Low salience** because stops are infrequent, unplanned and short
 - Overall **perceived as lacking in basic amenities and possibly dangerous**, particularly for women travelling alone, children and pets
 - Considered to be **'for lorry drivers'**
 - However, drivers open to the idea of **'enhanced laybys'** as long as they include clean toilets, separation from the road, benches, tables and bins



Laybys

"Sometimes we'll stop to read the map but it has to be a pretty desperate stop."
St. Albans, Male

"They would be so much better if they weren't so close to the motorway and had toilets, but they would have to keep them clean!"
St. Albans, Female

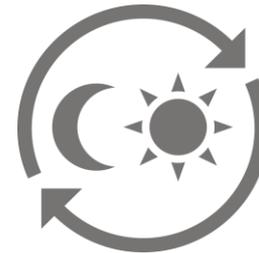
Business: MSAs meet needs for business drivers; only when probed, a few mention areas for improvement



- Respondents are **happy** with the **number and frequency** of MSAs
- Feedback generally **positive regarding services and brands**
- **Reliability and consistency** are again the core strengths



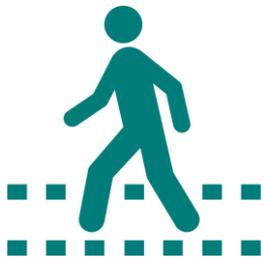
- **Expectations met** in terms of **functional** needs:
 - Sufficient facilities at regular intervals
 - A core, 24 hour service which includes:
 - Toilets
 - Fuel
 - Basic food/drink
 - **One-stop-shop covering all needs in little time**
 - Favourite brands open during commercial hours (Costa/Starbucks and Waitrose/M&S)



"The choice is fairly good but I miss healthy food. I think if more places offered options like soup or salad, I would feel a lot better and less 'ripped off'."
Newcastle, Female

"Most of them are cleaner, nicer and are able to offer more brands than they could before."
Newcastle, Female

- **Improvement** areas similar to leisure drivers:
 - Cleanliness (particularly in toilet facilities) variable
 - Limited choice of healthy, hot meals
 - Misleading signs indicating brands located at the other side of road



Business: 'A' road facilities avoided; drivers believe 'enhanced' laybys will not make them more likely to stop



- Business drivers have **little to say** about trunk road facilities, as they **rarely ever use** them
 - Overall, they **lack the key elements** users seek when contemplating a stop: regularity, consistency, convenience, cleanliness



Trunk road facilities

"There is a big difference between Motorway service stations and A roads. The A roads are very basic, literally garage, coffee and toilet. I call them 'desperation' stops."

Newcastle, Male

"They're generally not as well lit or signed. The toilets are awful and safety at night is a concern. I think they're worse in the North, I just don't stop at them."

St. Albans, Male

- Laybys are also **seldom used** by business drivers:
 - The idea of **'enhanced' laybys considered a 'nice to have'**, but respondents do not think it will make them more likely to stop



Laybys

"They're dangerous for girls everywhere; I wouldn't even stop there in an emergency."

St. Albans, Female

"I don't think that having toilets in laybys would make me stop because I would just assume they're in a state and not looked after."

St. Albans, Female

Professional: MSAs seen as expensive for 'own pocket' budgets, some trunk road stations better value in this sense



- MSAs good option for quick, basic needs stops (toilet, quick snack, coffee)
 - However, they are considered expensive for drivers' budgets
- Trunk road facilities, retail parks and supermarkets seen as lower cost alternatives, even if they mean diverting off-route



MSAs

Positives

- Reliable in amenities and brands
- Sufficient in number and intervals
- Open 24 hours
- Easy 'to-go' options

Negatives

- Expensive for drivers' limited budgets – most pay for own meals and fuel
- Sometimes crowded and stressful
- Repetition can become 'boring'

'A' Road

- Cheaper than MSAs
- Can find known brands (Co-op, Asda)
- Free parking if staying over 2 hours

- Unreliable amenities
- Inconsistent quality

"You have to stick to the route and schedule."
St. Albans, Coach driver

- Coach drivers almost entirely confined to MSAs to ensure reliability and capacity for passengers; along with having to stay on route
- MSAs meet most needs; some brands offer meal vouchers to drivers for bringing in business



Professional: drivers divert to trunk road services and other facilities seeking lower prices; laybys seldom used



Trunk road facilities

- Trunk road facilities are **used** by professional drivers **more often than other cohorts**
 - Stops tend to be **'grab and go'**
 - However, when they speak of these facilities, they include **retail parks, large supermarkets and petrol stations**
 - The main driver for diverting or stopping at these is **cost** (low cost and wide choice of food and lower cost fuel)
 - Drivers **not as concerned** about the **unpredictability** of these facilities

"The only decent service area I know of on the A road is on the A14 right outside of Cambridge."
Birmingham, Male

"Toilet facilities... you go in there and haven't bought anything and they don't look at you nice."
Birmingham, Male



Laybys

- Laybys are sometimes used by professional drivers for **short, in-vehicle stops**
 - Some **would like to see laybys improved** to provide a cheap, safe alternative to MSAs and trunk road facilities

"The French space them 20 miles apart – they have aires with fuel and restaurants, others are just picnic areas with a loo - you can sleep there for as long as you want."
Norwich, Female

"You shouldn't have to do your necessities on the side of the road in laybys, they should have toilets."
Birmingham, Male

HGV: Perceptions of MSAs depend on complexity of needs; overnight drivers feel the most negative



- Reliable and consistent in terms of number and frequency
- Largely perform for basic amenities: toilets, fuel and hot drink
- However, MSAs rarely meet all needs all of the time



- Stops are generally functional, there is a more emotional dimension for drivers who spend more time on the road, including: feeling welcome, having their own space, entertainment / socialising...

Rational

Short, functional stops

- Basic needs met: toilet, fuel and hot drink or quick sandwich/pasty
- Fuel brands acceptable and paid with company fuel cards
- Ample hours and consistency guaranteed

"Most companies now buy an agency card and every Monday morning we get an email saying which [fuel brand] to use."
Ipswich, Male

Fulfilment

Longer stops, including meals

- Some like McDonalds/Burger King for occasional, value meal
- Parking availability variable and spaces not always big enough
- Lorry parking far from building and no meeting hub for drivers

"The car parks are getting bigger for cars, but the lorry spaces are getting smaller."
Birmingham, Male

Overnight stays

- No parking later in the day
- Lack of security and noisy for sleeping in cab
- Food limited – lack of home-cooked meals/ vouchers often 'not enough'

"They don't give lorry drivers what they need, we're not made to feel welcome."
Birmingham, Male

Emotional

HGV: Truck stops perceived as better than MSAs but again, variable; laybys a 'necessary evil'



- Truck stops generally perceived as **better than MSAs**
 - Lorry drivers **don't feel judged and needs are understood**
 - Can sit in for a home-cooked meal
 - Can socialise with peers
 - Lower cost
 - More secure/better overnight facilities
 - But often regarded as **variable** in facilities from one to another
 - Can also have **capacity issues** (but less so than MSAs)

"The staff are happier and friendly, it's a much more personal experience than that found in the service station."
Birmingham, Male

"Most truck stops you feel more secure than you would at MSAs. A truck stop's got a 24 hour security man on the barrier."
Ipswich, Male

- Laybys can be **more secure than MSAs** for overnighting, but have **many issues**
 - Spaces are limited
 - Too close to road
 - No toilets or other amenities
 - Poorly signed and lit
 - Difficult to get in and out of
- Against this backdrop, drivers often **choose retail parks and industrial areas**
- Drivers open to idea of 'enhanced laybys', but also to closing laybys if capacity is augmented elsewhere

"I think they're dangerous. I will never ever go in them unless I really, really have to."
Ipswich, Female

"A toilet would be handy at these laybys."
Birmingham, Male



Truck stops



Laybys

Stakeholder views: missed opportunities in resolving lack of capacity; Highways England must work with local authorities



- General feedback supports that of HGV drivers
 - Stakeholders also say that road side facility issues (particularly lack of capacity for HGVs at roadside facilities) are impacting the industry more widely
 - As a result, drivers are quitting and fewer new drivers are joining
- The largest problem is obtaining planning permissions and funding for new lorry facilities
 - Projected lorry parks take up to 10 years to be built
 - Developers hit dead ends and give up
 - Little help or involvement from the authorities in this stage
- Proposed solutions include:
 - Utilising opportunities for mixed use lorry hubs with retail distributors, at warehouses, etc.
 - Setting minimum standards for lorry facilities, which currently don't exist
 - Encouraging the cooperation of local councils with Highways England and developers to speed up permissions and planning for new lorry parks

"Drivers are not offered the facilities they demand or indeed deserve. This is one of many reasons why the industry suffers from a shortage. Why would anyone choose a career that in a number of cases treats them as a second class citizen?"
Freight Operator

"There is a growing concern about congestion and the impact it has on efficiency, working conditions and the ability to meet end customer demands. Road works just make matters worse."
Freight/Haulage Association

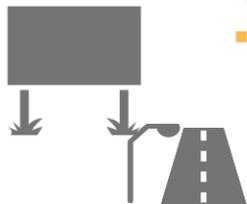
"The Department for Transport released a report highlighting the issues related to lorry parks in 2011, but nothing has been done about it since then"
Trade Union

"Highways England and the DFT need to take responsibility for MSA standards in terms of lorry provisions, just like they do for road surface and information."
Freight/Haulage Association

MSA focus



Detail – signage/road surface/lighting: no significant issues; petrol prices and brands 'nice to have' for some



- **Signage:** fixed expectations mean **few issues identified**
 - Amount of information sufficient – too much could be distracting
 - Petrol prices 'nice to have', but expected to be more expensive at MSAs

"Good to have brands on the signs, if I saw Waitrose I would stop, if it was KFC I'd give it a miss."
Professional Norwich

- 'Miles to next station' liked by all, particularly if looking for favourite brands (Costa/Starbucks...)
- Most do not focus on MSA operator – but some associate with establishments (Moto with M&S/Costa)



- Business drivers would like signs to better indicate exits



- Caravan towers would like parking to be better indicated



- Coach drivers would like to know if MSA is overcrowded before entering

"The guys stand on the slip road if the station is full of football fans and tell us to go to the next one."
Coach driver St. Albans



- HGV drivers would like to know if and how many parking spaces are left before entering

- **Lighting and road surface:** seen as **sufficient** by all



- In terms of security, HGV drivers feel MSAs lack:
 - Proper fencing
 - CCTV in the parking area for lorries
 - Consistently good lighting in parking areas for lorries

"A roads better than motorways, flood lights are better, not one services has adequate security, but they will check that you have paid."
HGV Birmingham



Detail – parking/layout/building fabric: low salience and sufficient for most (with some nuances); parking capacity biggest issue for HGV drivers



- **Needs** generally **met** in terms of **parking, fabric of building and layout**

- Two hour free parking limit sufficient for most

"You stop because you have to, you need a rest and then carry on."
Professional Norwich

- **When probed**, feedback is:

- Modern buildings preferred (but does not change behaviour)
- Most would like to see more outdoor green areas at MSAs
- Toilets not always consistent in cleanliness

"I like the new ones that look like airport terminals, they are sleeker and cleaner."
Business Newcastle

- **Differences** observed by **driver type**:



- Caravan towers complain of lack of parking at some MSAs

"I've sometimes ended up spending the night where the HGV's, risking getting fined because there's no caravan parking!"
Leisure St. Albans



- Motorcyclists want more bike bays and closer to/ visible from the main building



- Business drivers do not like having to cross footbridges to opposite MSA looking for signed brand



- Coach drivers prefer parking closer to building and newer looking building fabric for passengers



- Lack of parking at MSAs major issue for drivers, especially after a certain hour

- Parking often too far from main building
- Spaces tight, short and not 'chevroned'
- Overnight parking seen as expensive
- Few shower facilities and not always clean
- No central meeting hub for drivers



Detail – food/drink/retail: popular brands appreciated; prices perceived as high; some miss 'healthier'/home-cooked choices



- General impression is that **food/drink is more expensive** than comparable establishments
- However, consistency in popular, identifiable **brands appreciated** (McDonalds, Starbucks...)

- Many would like **more 'healthy'** and/or fresh, home-cooked options
 - For some, 'to-go' options at M&S/Waitrose make up for this lack
- Some **differences** regarding the importance of these issues by drivers type:

"I like to treat myself to a McDonalds breakfast."
Leisure Newcastle



- For leisure, purchase occasional and seen as a 'treat', so most are willing to pay more and indulge



- Business drivers tend to have expenses paid so cost not typically an issue



- Professional drivers often pay themselves so more of a distress purchase, frequently divert to retail parks/ 'A' roads for cheaper alternatives

"Stupidly overpriced - £5.50 for sandwiches and crisps."
Professional Norwich



- Vouchers given to HGV/coach drivers often not enough for a full meal



- HGV drivers 'eat-out' a lot and missed the home-cooked experience
 - The better truck stops are able to provide them with this
 - McDonalds/KFC - decent value, but not 'everyday' options

"After working 14-15 hours a day, the last thing I want personally is a McDonalds or a KFC, I'd rather have a hot meal."
HGV Ipswich

- Retail outlets** only really used by **leisure and some business** drivers
 - M&S and Waitrose appreciated and good for **'top-up' shopping**

"I like buying a bottle of wine or grabbing some dinner on the way home after a long day."
Business St. Albans



Detail – fuel/other amenities: fuel perceived as expensive but only changes behaviour in professional drivers; Wi-Fi important for business



- Drivers perceive **fuel** as being **more expensive at MSAs** than elsewhere
 - However, **importance** of this **varies by driver type**
 - Some adopt strategies like 'topping-up' with what they need to finish the journey



- As with food, leisure drivers seen as an occasional purchase; increased price does not change behaviour overall



- Business drivers usually have expenses paid, favour convenience/time-saving over cost, so generally do not change behaviour



- Professional drivers often pay for their own fuel; more sensitive to the fuel price differential – actively divert to 'A' roads and retail parks for cheaper fuel



- HGV drivers use fuel cards provided by employers – may look out for specific brands of station

- Wi-Fi** is the only other amenity that received **relevant feedback**



- Leisure drivers see it as a 'nice to have', but not essential as normally found in coffee shops



- More important for business drivers as they use for working whilst visiting MSAs – perceived as 'patchy' and unreliable

"It is what it is, and when you need petrol you need petrol! There's not much you can do about it."
Business Norwich

"It's a lot of money you can save a year by just Googling an ASDA or Sainsbury's and going there for fuel."
Professional Birmingham

"It's fine when you're just on your phone because you have your data, but when you need to use your laptop, it's hard to find Wi-Fi."
Business St. Albans



Improvements suggested

User segment	Need to have	Nice to have
<p>Leisure</p> 	<ul style="list-style-type: none">Majority of core needs metFew minority group exceptions:<ul style="list-style-type: none">Caravans: clearer parking directions and more parkingMotorcyclists: more bike parking bays / nearer to main building	<ul style="list-style-type: none">Competitive pricing in regard to food / drink choicesMore 'healthy meal options'Fuel price on motorway signageGreen areas / outdoor facilitiesConsistency in cleanliness
<p>Business</p> 	<ul style="list-style-type: none">Again, majority of core needs metThe exception being, improved reliability of Wi-Fi	<ul style="list-style-type: none">More 'grab and go' healthy food optionsConsistency in cleanlinessClearly designated exit signsClear/accurate internal signageImproved aesthetics of the building and outside area (e.g. modern glass construction, lounge type sitting areas, open green areas etc)



Improvements suggested

User segment	Need to have	Nice to have
<p>Professional</p> 	<ul style="list-style-type: none">▪ Fulfilling needs set within the context of price:<ul style="list-style-type: none">▪ Lower fuel prices▪ Competitive food / drink pricing▪ Free parking for 2 hour plus stays▪ Signage indication of parking capacity for coaches	<ul style="list-style-type: none">▪ More 'grab and go' meal options▪ Consistency in cleanliness▪ Reduced crowding at peak times▪ Coach parking facilities nearer the main building
<p>HGV</p> 	<ul style="list-style-type: none">▪ For those with relatively basic needs, the MSAs largely meet expectations. The exception being:<ul style="list-style-type: none">▪ More parking bays▪ For those with complex / overnight needs there are a number of issues to address:<ul style="list-style-type: none">▪ Better lighting / CCTV / fencing▪ Competitive food / drink pricing▪ Adequate / clean shower facilities▪ Welcoming environment / a place for a genuine rest / recuperation	<ul style="list-style-type: none">▪ More 'home cooking' options▪ Separation from wider leisure group▪ For 'overnighters': entertainment / social area▪ Parking nearer main building▪ Separate 'refrigerator truck' parking▪ Lower fixed price overnight parking charge▪ Better value for money food vouchers

User types – additional detail

Leisure drivers



Overview: MSAs have improved and provide a reliable and consistent level of service



- Overall, MSAs thought to be **sufficient** in number and intervals along the SRN
- Recognition of **investment** in premises and broad choice of brands
- Drivers **value** the consistency and reliability of the offer



MSA key **strengths** include:

- Sufficient facilities at regular intervals
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- A core, 24 hour service which includes:
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 - Basic food/drink
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"There's plenty of them, generally every trip you go on. If you're running short on fuel or you need to stop for a toilet, you're never usually more than half an hour max from one."
Newcastle, Male

"You have to be desperate to fill your tank up at a service station on the motorway!"
St. Albans, Female

Some **improvements** suggested:

- Prices perceived as higher than non-MSA equivalents (fuel and food)
- Cleanliness (particularly in toilet facilities) variable
- Limited choice of healthy, hot meals
- More green, outdoor areas desired



- Some MSAs abroad seen as cheaper and more modern (particularly by motorcyclists) – e.g. Germany, France and Belgium



Most drivers do not plan stops in detail; route familiarity and type of passengers are important influences



Planned

- Tend to travel with children or elderly people
- May have 'preferred stops'
- Sometimes drive regular or known routes
- Stop planning can be split by:

Those who 'plan' to stop after a certain time or distance driven

Those who have a favourite stop along a more or less regular route

- Stops are longer
- Meals tend to be 'sit-down' and 'a treat'
- Drivers/passengers look for more recreation

Ad Hoc

- Tend to travel alone or with friends/partners
- No predetermined preference for specific MSA
- Routes sometimes new or unknown
- Respondents split by:

Those who stop when necessary and wherever they can

Those who stop when necessary, but look for a specific brand

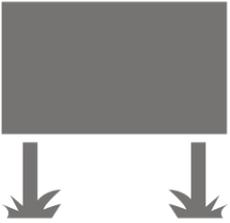
- Stops are shorter
- Focused on fulfilling 'basic needs': fuel, toilet, quick snack and stretch legs

"Yeah, we've got two little-uns, so it's more important working out where you could stop for them as well. Typically its an hour or two hours into the journey and having a stopping point is a bit essential really."
Newcastle, Female

"I do tend to home in on the services that've got Costa and I always like the ones that have got M&S."
MSA, Male

"Once a fortnight I'll drive my mum to Devon and she always knows where she wants to stop."
St. Albans, Female

Detail – signage/road surface/lighting: no significant issues; some want fuel prices and better parking indications



- Because drivers know what to expect from MSAs, they have no real issues with signage
 - Information seen as sufficient – although some would like to see fuel prices
 - Countdown to exit and miles to next MSA appreciated
- Drivers do not focus on MSA operator (e.g. Westmorland), and only some focus on establishment brands (e.g. Waitrose)
 - A few, associate some MSA operators with establishments (e.g. Moto with M&S and Costa)
- Limit on how much information should be shown – anything requiring more than a moment's concentration considered dangerous
- Within the MSA's grounds, some (particularly those towing caravans) say it is confusing to find where they are meant to park



"It's not normally a number of spaces issue, it's can you find them easily."

MSA, Male

"I've avoided services although we need to stop, but when I see a Costa Coffee I will stop. I will carry on if I know there is one ahead."

Newcastle, Male

"It's all about clarity and it's quite often about getting things like the white lines re-painted regularly, because very often the clarity would be there if you could see it."

MSA, Female



- In terms of road surface and lighting – overall both seen to be of good quality and sufficient

"The drive-through Starbucks at Fleet is great!"

St. Albans, Male

"The lights are just fine compared to trunk roads"

St. Albans, Male, Motorcyclist

Detail – parking/building fabric/layout: low salience and limited feedback; with some nuances by driver type



P

- Motorcyclists would like bike parking bays, visible from inside the MSA buildings
- Those towing caravans complain about lack of parking for caravans and the lack of signage when parking is available
- Most have enough time to tend to all needs in 2 hours and therefore don't have to pay
 - However, one or two complain about not having enough time to nap when needed



"I have an expensive BMW motorbike so I don't want it to be stolen, I try to park as close as possible... for theft purposes."

MSA, Male

"The caravan parking isn't totally convenient, in fact that's true of quite a lot of the services. The caravan parking isn't always very either clear or comfortably accessible."

MSA, Female

"I've sometimes ended up spending the night where the HGV's, risking getting fined because there's no caravan parking!"

St. Albans, Female

- Aesthetics generally low salience for leisure drivers
 - Some like the 360° circular vision of some MSA buildings – easy to see all shops

- *When probed*, many say they want more green areas (including benches), playgrounds and dog walking areas
 - Facilities described as 'doing it right' include Tebay, Gloucester and Woodall

"It's all natural, it's hidden, it's not this huge stand-out thing, it blends in with the landscape."

MSA, Male

Detail – food/drink: Popular coffee brands liked; food considered 'pricey' and lacks more healthy choices



- General impression is that food/drink is more expensive than comparable establishments
 - A few (particularly those travelling alone) avoid MSA restaurants to save money
- However, many accept paying more (albeit some, grudgingly) because it is an 'occasional' expense and simply 'part of the journey'
 - Others see it as a 'treat'
- Brands mentioned most are high street, identifiable brands like Costa/Starbucks/McDonalds/Burger King
- Often argued that there is a limited choice of healthy food/hot options
 - Again, for many this is 'ok' because it is considered an occasional 'treat'
 - M&S/Waitrose acknowledged as providing an alternative 'to-go' healthy option
- A few claim to miss the 'home-cooked experience' of dining – still found at some trunk road facilities

"The brands are rather generic but they're functional and well-known. The kids love McDonalds."
St. Albans, Female

"You never get value for money from any service stop because basically they're rated out of existence."
MSA, Male

"And McDonalds as well, I like to treat myself to a McDonald's breakfast."
Newcastle, Female

"You don't have to hunt and decide which bad fast food chain you want, there's not McDonalds, Burger King or KFC."
MSA, Male

"I think what it misses is what I would probably term 'pub grub'. We're not in to burgers, we're not much in to fish and chips, none of that would be a food of choice."
MSA, Female

Detail – fuel: Expensive, but seldom enough to change behaviour



- Perceived as expensive, but most are sanguine about this because it is not seen as a regular purchase
- Many claim they are 'taken advantage of', but seldom enough to convince them to detour for cheaper fuel
- Only a few adopt strategies to avoid purchasing fuel at MSAs
 - Filling their tanks before beginning their journey
 - 'Topping-up' with minimum amount needed to finish the journey

"Petrol is very expensive, I would probably say prices are at least 25% more in a big service station than at a normal petrol station."

Newcastle, Male

"Birchanger is extortionately expensive for petrol, it's about 10 or 11p more a litre than anywhere else, I mean I expect to pay a bit more in a service station because it's there for the ease so I avoid Birchanger I will not go in there."

Newmarket, Female

"It's a necessity, if you've got to stop, you've got to stop and pay the price. Its a lot more expensive, probably about 10% more."

Newcastle, Female

"It's expensive still, they all are, all services, they're all overpriced."

MSA, Male

"We only buy fuel if we really need it, and even then, we'll only put in the amount we think we need to get home."

St. Albans, Male

Detail – shops/other amenities: Waitrose/M&S favourite brands, others seldom used; Wi-Fi not essential



- Majority like supermarket brands for 'top-up' shopping (Waitrose, M&S)
 - Least frequented are non-core retail outlets, like phone shops

*"You can buy some fruit at Waitrose or a magazine at WH Smith, it's very convenient."
St. Albans, Female*

*"I always like the ones that have got M&S even though I don't necessarily use that, but if I decide I want something to eat to take with me, I prefer to go and get something from M&S."
MSA, Male*

*"They've got more technology as well. If you've forgot your charger, most services sell them for the car. Those little shops have saved my life a few times."
Newcastle, Male*



- Wi-Fi – seen as a 'nice to have' but not essential
- Gambling – a bit polarising for leisure travellers; some feel them to be inappropriate for family environments

*"You can normally get Wi-Fi inside the coffee shops like Starbucks, I don't remember ever getting it in the service station itself."
St. Albans, Male*

*"I'm a little shocked that you can do things like drink or gamble at a service station on the motorway, it's not right."
St. Albans, Female*

*"The gambling seems a bit bizarre. It seems a strange thing that you would come and do in the middle of a journey."
MSA, Female*

In contrast to MSAs, trunk road facilities are unreliable; difficult to anticipate what you will get



- Drivers **less likely to plan** stops at **trunk road** facilities:
 - Journeys on 'A' roads seldom as long as on motorways
 - Drivers have a **wider variety to choose from** when stopping on 'A' roads (including retail parks, nearest town, pubs...)
- Most find it difficult to give coherent responses because **quality and range** so **variable**:
 - Experiences range from being **very good to very bad**
 - On a whole, trunk road facilities considered **unpredictable and variable** in terms of opening hours, cleanliness and basic amenities (some do not even have toilet facilities)
- Recognised brands reassuring** (like Little Chef and petrol station brands)
 - A few prefer the 'sit-down meal' experience
 - However, experiences again are very mixed
- Signage** is often **not very informative**, variable in level of information and confusing (dark, faded, too small)
 - In addition, most do not feel the 'miles to next station' information would be relevant, owing to variability

"What happened to the Little Chef's that Heston was taking over?"
St. Albans, Female

"Little Chefs are generally atrocious, although sometimes they're ok if there is nothing else; we normally wander into town and avoid them."
St. Albans, Female

"It's got no aspirations of being anything else than what it is, and I have used the toilets before and they're not the best in the world."
'A' road facility, Male

"The A road ones tend to be a bit older and scruffier. Washington for example (on the A1) is still a dump. You just try and avoid it as much as possible. Its dirty and old."
Newcastle, Male

Laybys seldom used, lacking in security and basic amenities



- Laybys **low salience** because seldom used by drivers
 - When laybys are used, stops are **unplanned and short**
- Stops tend to be only **during the day** for a quick rest or purchase something from food trucks
 - A few also stop at laybys that had picnic amenities, but these are few and far between
- Overall, however, laybys **perceived as lacking in basic amenities and possibly dangerous**
 - **Little separation** from the road a concern (particularly for those with children or pets)
 - Many consider them to be 'for **lorry drivers**'
 - **Women** feel particularly vulnerable about stopping at laybys
- Drivers are open to the idea of '**enhanced laybys**' resembling the occasionally mentioned French 'Aires de Service'
 - To be attractive, they must **at least** provide: well maintained toilets, separation from the road, benches, tables and bins
 - 'Nice to haves' include food/drink facilities and dog walking areas

"They don't compare in any iota to the French Aires, the availability of them, the cleanliness of them and just the general atmosphere."

MSA, Male

"Sometimes we'll stop to read the map but it has to be a pretty desperate stop."

St. Albans, Male

"They would be so much better if they weren't so close to the motorway and had toilets, but they would have to keep them clean!"

St. Albans, Female

Business drivers



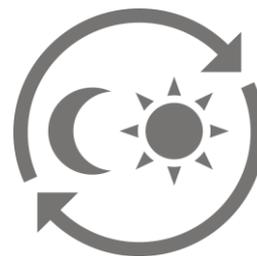
Overview: MSAs meet needs for business drivers; only when probed, a few mention minor issues



- Respondents are **happy** with the **number and frequency** of MSAs
- Feedback generally **positive regarding services and brands**
- **Reliability and consistency** are again the core strengths



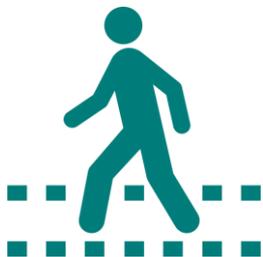
- **Expectations met** in terms of **functional** needs:
 - Sufficient facilities at regular intervals
 - A core, 24 hour service which includes:
 - Toilets
 - Fuel
 - Basic food/drink
 - One-stop-shop covering all needs in little time
 - Favourite brands open during commercial hours (Costa/Starbucks and Waitrose/M&S)



"The choice is fairly good but I miss healthy food. I think if more places offered options like soup or salad, I would feel a lot better and less 'ripped off'.
Newcastle, Female

"We never spend that long here, it's just a functional stop so it's comfortable enough for what at you are trying to do."
'A' road facility, Female

- **Improvement** areas similar to leisure drivers:
 - Cleanliness (particularly in toilet facilities) variable
 - Limited choice of healthy, hot meals
 - Misleading signs indicating brands located at the other side of road



Stops are unplanned and more task-focused, albeit minimum standards are higher



- Stops **seldom planned** unless route is well-known; more ad hoc and short in general



- Once again, it is assumed by most that MSAs will be found at **regular intervals**
 - Some try to complete their drive without stopping unless absolutely necessary
 - A few with more knowledge and experience of the SRN, still have a 'preferred' MSA or two
- Overall, drivers want an efficient way to meet **core needs quickly**

- Reasons for stopping are very functional:

- Fuel
- Toilet
- Meal to go/coffee/snack
- Meeting/phone call/email
- Last minute shopping in the evenings

- However, they are more demanding for efficiency:

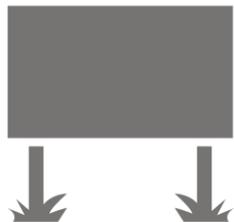
- More sensitive to toilets being unclean
- Some 'drawn' to newer looking buildings
- Want 'things to work' and to save time

"I don't stay for long, just to grab a quick coffee and check my emails because I can't do that while I'm driving!"
Norwich, Female

"It really puts me off to walk into a toilet that smells bad or looks unclean, I feel like never going back again."
St. Albans, Female

"With service stations you tend to have your favourites, I nearly always stop at Wetherby, it's got a nice service area and I can get a Costa. I also like the fact that it has a M&S so I can grab dinner on the way home."
Newcastle, Male

Detail – signage/road surface/lighting: low salience, issues mostly related to time-saving



- No significant issues – fixed expectations mean few issues identified
 - Amount of information seen as sufficient
 - Petrol prices 'nice to have', but not overly important to those with paid expenses

- 'Miles to next station' liked by all, particularly if looking for favourite brands (Costa/Starbucks...)
 - However, and as with leisure drivers, most focus on establishment brands instead of MSA operators
- Within MSAs, some feel improvements could be made to ensure easy navigation and quicker exits

"It's pretty good, you can see them from a while off, they have all the information needed – facilities, brands, opening times, miles to entrance."
Norwich, Male

"Some are pretty hard to access, and the roads are not very easy to use and it takes too long to get there, like the services at Leeming Bar."
Newcastle, Male

"The 'miles to next station' bit is great because if I want Costa and not Starbucks and it's not far, I'll wait until the next one."
St. Albans, Female



- Road surface and lighting are also seen to be good quality and sufficient

"It's gotten much better, a lot of them are very bright now"
St. Albans, Male

Detail – parking/building fabric/layout: 'second order' needs apparent in terms of 'ideal' layout and fabric



P

- No significant issues mentioned in terms of parking – seen as spacious and sufficient



- Some prefer refurbished and 'more inviting' buildings – influenced by familiarity with a wider range of facilities
 - However, this is not seen as critical and does not drive decisions on where to stop
- Green spaces are often appreciated
 - More comfortable 'resting areas' desired (like sofas)
- Some feel frustrated at having to cross to the opposite MSA to reach a particular establishment or brand (like M&S or Waitrose)

"I don't like ones that look dark and dingy. Birch always used to look a bit unsafe and I would only use it in an emergency."

Newcastle, Female

"Call me picky, but I prefer the ones that look bright and clean."

St. Albans, Female

"Some of the outsides are not nice, especially with walkways that you have to take over the motorway to access facilities. I tend to avoid those."

Norwich, Male

"Some look a little clinical, they could be cosier, like with sofas."

Norwich, Male

"I hate it when the sign says Waitrose but then you get inside and there's no Waitrose actually, it's on the other side of the road and you have to cross on the footpath!"

St. Albans, Female

"I think it's important that you don't feel as if you're on a motorway."

MSA, Female,

Detail – food/drink: Perceptions similar to leisure drivers; but business users value convenience over all else



- Most have expenses paid by employers, and favour time/convenience over price
 - *When probed*, the general impression is that food/drinks are expensive
- Often, business users buy food 'to-go' or to eat in their vehicle, and don't stay at the MSA for long
 - Waitrose and M&S again seen as good, healthy, 'to-go' options
 - Popular coffee brands liked (Costa/Starbucks)
 - However, many say they want more 'healthy food' among fast food choices

"Food is great, it's not McDonalds!"
MSA, Male

"You know that you're paying too much, but it's there, it's easy to get and it's all so quick that your back in your car with a nice coffee in 15 minutes."
Newcastle, Male

"It would be good if there were more healthy 'fast food' restaurants, the healthiest you can get is Subway unless you want to get something cold from M&S."
St. Albans, Female

"It's more expensive than the high street, you just expect to pay more though. It's the convenience of not having to detour to the nearest town."
St. Albans, Male

"It's good to have brands that you recognise. Ones that are credible and good quality and consistent across the country."
Norwich, Female

"I like that at Tebay there is a nice local deli with some really tasty salads/sandwiches, they should do that at more places"
St. Albans, Male

"You tend to get lots of American fast food brands like KFC, McDonald's, Burger King, which is alright but it would be nice to have a change from cheeseburgers and fried chicken."
Newcastle, Male

Detail – fuel: Impressions of price polarised depending on budget restraints; but overall do not change behaviour



- *When probed*, respondents say petrol prices are also expensive
 - The extent to which respondents 'care' about increased prices, though, varies
- Those who have all expenses paid by their employers are generally more sanguine
- Drivers paying from 'their own pockets', or are paid an allowance by employers, feel more 'taken advantage of'
 - Most do not change their behaviour; as time-saving and staying on-route still more important
 - Some adopt strategies to avoid buying, like filling up prior to the journey or 'topping-up' with minimum

"You often come away feeling like you've been made a mug of."
Newcastle, Male

"I get paid per mile so I'll avoid filling up unless I really need to. I will only ever buy as much as I need to get where I'm going."
St. Albans, Male

"Why would you want to know the price? You already know you're going to get ripped off, so I'd rather not be reminded."
St. Albans, Male

"The fuel is expensive, I will only get fuel at a service station if it's an absolute emergency."
Newcastle, Female

"I'm pretty sure the petrol station at Beaconsfield is not as expensive, why can they keep their prices down?"
St. Albans, Female

"It is what it is, and when you need petrol you need petrol! There's not much you can do about it."
Norwich, Male

Detail – shops/other amenities: Waitrose/M&S help meet needs for healthy food; patchy Wi-Fi more of an issue



- Waitrose and M&S are greatly appreciated brands for two reasons:
 - Help make up for the shortfall in 'healthy' options with their 'to-go' range
 - 'Top-up shop' for those on their way home in the evenings

- However, some mention they would like to see more local shops/brands available at MSAs, like farmers' markets or other local produce options

"You tend to find that lots of people stop just for the M&S at Wetherby. I like to pop in on the way back home. Just to grab a quick dinner from Marks - a nice meal and maybe some wine for the evening."

Newcastle, Female

"Tebay have got a lot of local, organic produce and homemade things. It's a very nice experience."

MSA, Female

"You can always buy a salad at M&S if you get sick of eating burgers."

St. Albans, Male



- Wi-Fi – seen as more important than for leisure drivers, for sending/receiving emails
 - Many say they can't get Wi-Fi at MSAs (apart from at coffee shops)
 - Wi-Fi at MSAs of variable quality and reliability

"It's fine when you're just on your phone because you have your data, but when you need to use your laptop, it's hard to find Wi-Fi."

St. Albans, Female

"It's patchy at best. I normally just get it from McDonald's or use my mobile data."

Norwich, Male

"I haven't got much knowledge of the Wi-Fi and the mobile phone signal, but it doesn't seem great."

Newcastle, Male



- Business drivers have **little to say** about trunk road facilities, as they **rarely ever use** them

Overall, trunk road facilities **lack the key elements** business users seek when contemplating a stop:

- Regularity in intervals and numbers
- Assured basic amenities
- Brand consistency
- Cleanliness
- Safety/security

"Bygone era ... they are aren't they?
Something from the past where you
used to go when you were younger."
'A' road facility, Male

"The toilets have seen better days but
they're free, you don't have to pay for
them so you know you can't have it all
ways can you?"
'A' road facility, Female

"There is a big difference between Motorway
service stations and A roads. The A roads are
very basic, literally garage, coffee and toilet. I
call them 'desperation' stops."
Newcastle, Male

"They're generally not as well lit or signed. The
toilets are awful and safety at night is a concern.
I think they're worse in the north, I just don't
stop at them."
St. Albans, Male

"It's a bit run down I have to say but I
think that's quite the norm now with
some of the smaller service stations."
'A' road facility, Female

"A lot of them just look abandoned
and dark. Like you would walk in and
expect to find a bunch of lorry
drivers."
St. Albans, Female

"The toilets are just grim; and that's if
you even find a toilet."
Norwich, Female

Laybys seldom used; the idea of 'enhanced laybys' is not overly appealing



- Laybys are also **seldom used** by business drivers
 - Some stop to 'take a call' but are also of the opinion that they are **potentially dangerous**
- The idea of **'enhanced' laybys considered a 'nice to have'**, but respondents do not think it will make them more likely to stop
 - Only a few say they might use them for an emergency toilet break, if toilets are clean (which they are sceptical about)

"They're dangerous for girls everywhere; I wouldn't even stop there in an emergency."
St. Albans, Female

"Isn't that just where all the lorries park at night? I didn't even realise cars stopped there."
St. Albans, Male

"The food trucks there are horrible! I would never buy from them."
Norwich, Female

"It would be helpful to have some, if broken down, especially if there are more SOS phones around."
Newcastle, Male

"The Aires in France are miles ahead, they are off the motorway, have clean toilets (sometimes showers) and benches."
St. Albans, Female

"I don't think that having toilets in laybys would make me stop because I would just assume they're in a state and not looked after."
St. Albans, Female

Professional



Overview: MSAs seen as expensive for 'own pocket' budgets, some trunk road stations better value in this sense



- MSAs good option for quick, basic needs stops (toilet, quick snack, coffee)
 - However, they are considered expensive for drivers' budgets
- Trunk road facilities, retail parks and supermarkets seen as lower cost alternatives, even if they mean diverting off-route



MSAs

Positives

- Reliable in amenities and brands
- Sufficient in number and intervals
- Open 24 hours
- Easy 'to-go' options

Negatives

- Expensive for drivers' limited budgets – most pay for own meals and fuel
- Sometimes crowded and stressful
- Repetition can become 'boring'

'A' Road

- Cheaper than MSAs
- Can find known brands (Co-op, Asda)
- Free parking if staying over 2 hours

- Unreliable amenities
- Inconsistent quality

"You have to stick to the route and schedule."
St. Albans, Coach driver

- Coach drivers almost entirely confined to MSAs to ensure reliability and capacity for passengers; along with having to stay on route
- MSAs meet most needs; some brands offer meal vouchers to drivers for bringing in business



Knowledge of the SRN more extensive, 'preferred stops' more common; routes, however, almost always ad hoc



- All professional drivers have large knowledge of the network, so favourite stations/stops are common
 - However, stop planning depends on whether routes take them by 'preferred stations'
 - Many do not mind diverting, as long as it does not take them too far off-route
 - Some also avoid stopping to finish journey in less time and save money



- Stops very task-focused; no one interested in staying for long periods of time or purchasing more than the essential

Reasons for stopping:

- Toilet break
- Fuel
- 'To-go' meal
- Hot drink



"I drive someone up to Scotland 3-4 times a week, obviously you have to stop for him to rest and to get fuel."

Birmingham, Male

"I do the same journey, it's easy for me to stop, at the same time garage."

Norwich, Male

"Half an hour fresh air and a cup of tea."

Birmingham, Male

"You more or less know where you'll be at a certain time because we drive regular routes; I also know which stations will be more welcoming for big groups"

St. Albans, Coach driver

- Coach drivers have the same driving hour restrictions as lorry drivers: two hours driving with a 45 minute rest break – so stops for rest are mandatory and are therefore planned in more detail



Detail – signage/road surface/ lighting: No issues reported; coach drivers would like to know when MSAs are full



- As seen with previous drivers, expectations are normally consistent and met; therefore, detailed signage (aside from establishment brands) not needed
 - A couple mention their desire to see fuel prices on motorways signs, but this is a minor point

- Coach drivers say they want a way to know when MSAs were full, to avoid stopping
 - Welcome Break staff reported to often stand on the slip road to inform drivers of overcrowding



"The French provide signs that give you a choice about which stations to stop at, who is offering what fuel at what price – this would be helpful."
Norwich, Male

"Good to have brands on the signs, if I saw Waitrose I would stop, if it was KFC I'd give it a miss."
Norwich, Male

"The guys stand on the slip road if the station is full of football fans and tell us to go to the next one."
St. Albans, Coach driver

- In terms of road and lighting, no significant issues mentioned for MSAs; overall both seen to be of good quality and meet their needs



Detail – parking/building fabric and layout: Coach drivers have most feedback regarding passenger needs



P

- Professional drivers' stops are short and functional needs generally met, so feedback is limited
 - A few complain about toilets being at back of building, tempting to spend money and forcing them to walk through busy environments



"You stop because you have to, you need a rest and then carry on."
Norwich, Male

"The toilets need to be moved forward and improved."
Norwich, Female

- Coach drivers have more to say:
 - Prefer bus parking to be closer to the building (Welcome Break facilities good example)
 - Circular, brighter buildings preferred by passengers
 - More green areas desired for passengers but also for coach drivers to eat outside



"My passengers prefer the big new buildings because they walk in and can instantly see what's on offer."
Norwich, Coach driver

"It's nice to stop at the ones that have a sitting area outside. I don't like sitting on those plastic food court chairs."
St. Albans, Coach driver

"The motorway stations suit everybody's needs, that's why we stop there, there's always something for everyone."
Norwich, Coach driver

Detail – food/drink: food expensive and repetitive; coach driver vouchers often not enough



- Many drivers take their own food but need to 're-stock' during longer journeys
 - Food tends to be 'grab and go', but sometimes drivers want hot meals

- MSA food more of a 'distress purchase'
 - Generally seen as expensive
 - Particularly an issue for drivers who pay themselves
 - Standard brands/choices become boring with regular use

"I tend to bring snacky stuff with me, like apples, bananas..."
Birmingham, Male

- Many actively divert to retail parks and supermarkets as a result of the above
- Coach drivers also pack meals occasionally, but largely rely on vouchers given at MSAs
 - However, vouchers often 'not enough' for a full meal



"I'd rather make my sandwiches at home, I've had a few bad experiences, one, where I've bought KFC at a service station sat down and started eating it and lots of blood came out of it."
Norwich, Male

"Stupidly overpriced - £5.50 for sandwiches and crisps."
Norwich, Male

"It's great that we get vouchers for bringing passengers in to spend money, but they don't really stretch very far, I often have to spend my own money."
St. Albans, Coach driver

Detail – fuel/other amenities: fuel prices a big issue for professionals; used more often and paid for by drivers



- Drivers are more sensitive to the fuel price differential (paying for it themselves or on a budget)
- Purchases therefore generally avoided or minimised by adopting strategies
 - Ensuring they have enough fuel before initiating the journey
 - 'Topping up' only minimum
 - Diverting to cheaper petrol stations/retail parks on 'A' roads

"My FD won't stand a receipt for petrol from the motorway"
Birmingham, Male

"It costs 10p a litre more! If you have to refuel on the motorway you just put in enough to get you off the motorway"
Birmingham, Male

"It's a lot of money you can save a year by just Googling an ASDA or Sainsbury's and going there for fuel."
Birmingham, Male

"We don't stop for fuel on the motorway because coaches normally have filling stations at their base."
St. Albans, Coach driver



- Few professionals use shops at MSAs, and therefore have little to say about them

- Coach drivers have generally neutral or positive feedback on behalf of passengers, as they do not use shops themselves



Trunk road facilities offer a cheaper alternative to MSAs; although they are a 'no-go' for coach drivers



- Trunk road facilities are **used** by professional drivers **more often than other cohorts**
 - The main driver for diverting or stopping at these is **cost**

- However, when drivers speak of trunk road facilities, they also refer to **retail parks and large supermarkets**
 - Offer wider ranges and **cheaper** options (food and fuel), at **convenient** locations
 - Free parking
- 'A' road stations still regarded as **unpredictable** in quality and variety of amenities
 - Drivers are not so concerned about this though, as stops tend to be 'grab and go'
 - Familiar brands at some 'A' road services (Co-op, Asda, petrol brands) are appreciated

"The only decent service area I know of on the A road is on the A14 right outside of Cambridge"
Birmingham, Male

"Toilet facilities... you go in there and haven't bought anything and they don't look at you nice."
Birmingham, Male

"It's a bit run down, the toilets aren't the nicest of toilets but when you're desperate you just go don't you? I wouldn't actually stop here again."
'A' road facility, Female

- Coach drivers** feel trunk road facilities are '**not an option**' for them, primarily due to lack of **capacity**



Laybys can be a viable option for drivers to stop, but lack security and basic amenities



- Laybys are sometimes used by professional drivers for **short, in-vehicle stops**;
 - In order to have a quick bite to eat or make a call

- Some say they **would like to see laybys improved** in order to provide a viable, safe alternative to MSAs for stopping
 - Minimum requirements for them include a clean toilet, separation from main road and seating

"They need more non-parking areas."
Norwich, Male

"I would never use a layby, maybe if I were driving without any passengers but it would have to be an emergency."
St. Albans, Coach driver

"Laybys in the UK are too close to the road."
Norwich, Male

"You shouldn't have to do your necessities on the side of the road in laybys, they should have toilets."
Birmingham, Male

"I wouldn't stop at a layby because I don't feel safe."
Birmingham, Female

"The French space them 20 miles apart – they have aires with fuel and restaurants, others are just picnic areas with a loo - you can sleep there for as long as you want."
Norwich, Female

HGV



Overview: Perceptions of MSAs depend on complexity of needs; overnight drivers feel the most negative



- Reliable and consistent in terms of number and frequency
- Largely perform for basic amenities: toilets, fuel and hot drink
- However, MSAs rarely meet all needs all of the time



- Stops are generally functional, there is a more emotional dimension for drivers who spend more time on the road, including: feeling welcome, having their own space, entertainment / socialising

Rational

Short, functional stops

- Basic needs met: toilet, fuel and hot drink or quick sandwich/pasty
- Fuel brands acceptable and paid with company fuel cards
- Ample hours and consistency guaranteed

"Most companies now buy an agency card and every Monday morning we get an email saying which [fuel brand] to use."
Ipswich, Male

Longer stops, including meals

- Some like McDonalds/Burger King for occasional, value meal
- Parking availability variable and spaces not always big enough
- Lorry parking far from building and no meeting hub for drivers

"The car parks are getting bigger for cars, but the lorry spaces are getting smaller."
Birmingham, Male

Overnight stays

- No parking later in the day
- Lack of security and noisy for sleeping in cab
- Food limited – lack of home-cooked meals/ vouchers often 'not enough'

"They don't give lorry drivers what they need, we're not made to feel welcome."
Birmingham, Male

Fulfilment

Emotional

Planning for stops reliant on factors which are often out of drivers' control



- Given the variety of driving conditions/experiences, drivers find it difficult to plan their stops
- HGV drivers may have 'preferred places' to stop; but stopping at them is contingent on a series of circumstances



- They are restricted with where/when they can stop, due to length/weight of vehicle and time regulations
 - Limits also set by delivery schedules

"A lot of the time, because of the taco, I find myself parked on a random road out the way."
Birmingham, Male

- Roads and most routes are well known, but unpredictable
 - Often need last minute 'contingency' plans owing to traffic, roadworks, driving times or MSA capacity
 - As a result, sometimes forced to stop on slip roads, hard shoulders, and in other prohibited areas



"The A1 is the best place for truck stops."
Ipswich, Male

"You've got digital tacho card and regulations, it's hit and miss, luck of the draw, it's hard to get somewhere especially if you're on a timed run."
Birmingham, Male

"Alconbury is one of the better ones."
Ipswich, Male

Spending the night on the road is a frustrating experience for drivers, and demands become higher



- Drivers who spend the night on the road are more demanding in terms of roadside facility expectations
 - Issues are augmented by the fact that drivers spend more time at these facilities
- Parking seen as expensive compared to truck stops
 - Some resort to laybys and industrial/retail park areas to avoid having to pay at all
- Amenities often don't meet all needs and lack general cleanliness and maintenance
 - Showers limited in numbers and dirty
 - Parking not guaranteed and even rare after a certain hour
 - In addition, parking often loud due to engine noises/refrigerated lorries
 - Lack of 'home-cooked' meals mean drivers' often eat fast food
 - Areas for lorries not secure, lacking fencing and CCTV
 - No central meeting hub and/or entertainment for lorry drivers

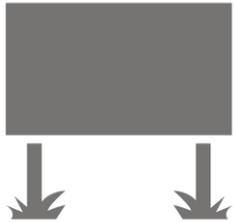


"When you've got 100 odd trucks parking up, the least they could do is offer a driver something healthy to eat."
Ipswich, Female

"I had a shower on route down to London and I was ill a week later, it was more than likely I'd picked up a bacterial infection from a dirty shower and I ended up with septicaemia."
Ipswich, Male

"The showers in those services, I wouldn't wash my dog in them."
Birmingham, Male

Detail – signage/security: capacity and lack of overnight security biggest issues



- HGV drivers consider signage to be good at MSAs, but could be improved with the following additions:
 - Fuel station brands
 - How many parking spaces are available

"Signs could give you a number of trucks spaces available."
Birmingham, Male

"More signage about truck stops always welcome, on the A34 and A38 could do with some."
Birmingham, Male

"I think what they need is whether it's a Shell or BP because if our price for fuel one week is BP, when you're driving along you can't tell whether that's a BP garage or not."
Ipswich, Male



- MSAs generally seen as lacking in overnight security
 - Some feel truck stops and even laybys are safer

- Lorry parking areas are poorly lit
- Lack of proper fencing
- Inconsistency with CCTV

"You need a well lit and secure car park and they are hard to find."
Birmingham, Male

"Truck stops become full, laybys become full, and then it becomes a real big problem of like where can you safely park your vehicle?"
Ipswich, Male

"A roads better than motorways, flood lights are better, not one services has adequate security, but they will check that you have paid."
Birmingham, Male

Detail – parking/building fabric/layout: parking capacity most important problem to address



- P**
- Parking insufficient in number of spots available – with most becoming full in the evenings
 - Longer vehicles often find it difficult to park and manoeuvre
 - Parking considered to be too far from building for some
 - Overnight parking seen as expensive
 - Spaces too close together, making it too noisy for overnight drivers parked next to others (like refrigerated lorries)
 - Drivers also need 'chevron' parking

"Refrigerated lorries do my head in, in some they go on and off and they are loud. I've had to move a lorry in my pants."
Birmingham, Male

"Planning is made worse by the fact that you get a penalty for parking in the wrong place. You don't get many friendly traffic wardens and any opportunity they will give you a ticket."
Birmingham, Male

"They park you so close, you're like sardines, you can't open your door properly, they rip you off."
Ipswich, Male

- 
- Little feedback from any other than overnight drivers
 - Shower facilities often suboptimal in number and cleanliness
 - Many lack a 'meeting hub' for drivers to socialise with other drivers without having to purchase anything
 - Providing some entertainment, like a TV or bar
 - Including green areas or open space

"They need to provide multiple clean showers and proper segregation from motorists."
Birmingham, Male

Detail – food/fuel/shops: generally perceived as unhealthy for 'everyday eating', with a craving for 'home-made' quality



- This topic is more important to HGV drivers than to other groups
- Some drivers bring snacks or packed lunches on some journeys, but often still need to buy food because of long journeys
 - MSA food generally seen as expensive for 'own pocket' purchasing
- McDonalds and KFC seen to be value options, but not to be eaten on a daily basis
 - Vouchers given with parking passes often not enough for a full meal
 - The repetition of the same options also becomes boring for many
 - In addition, fast food, although hot, sometimes feels 're-heated' and not fresh
- Drivers tend to eat a lot of 'meals out', but miss the home-cooked, sit down experience
 - Some trunk road facilities and truck stops, however, are able to make up for this

"After working 14-15 hours a day, the last thing I want personally is a McDonalds or a KFC, I'd rather have a hot meal."
Ipswich, Female

"I love finding one of those food trailers in a layby, watching them cook an egg for you. I just much prefer having freshly cooked food."
Birmingham, Male

"Most of what is on offer is absolutely irrelevant to what we are doing or what we need. We don't need a frothy vanilla latte, we just need a nice cup of tea."
Birmingham, Male



- Most drivers look out for the brands of their fuel cards; no significant issues with fuel as it is paid for by employers
- HGV drivers do not use shops at MSAs, apart from occasionally WH Smiths to buy a paper or magazine
 - Overall, other shop choices are not relevant to them

Trunk road facilities ('truck stops'), offer drivers a more 'welcoming' environment at a lower price



- Truck stops generally **perceived as better than MSAs**
 - But often regarded as variable in facilities from one to another
 - Drivers try to stop at the ones they know are 'good'
- Provide a space 'for lorry drivers' where they **don't feel judged**, which **understands their needs** (often family run) and where they can **socialise with peers**
 - Drivers like 'sit-down' restaurant facilities where they can get 'home-cooked' meals
 - Lower prices for meals and parking appreciated
 - Considered to be more secure (including fences and CCTV) and quieter
 - Some have entertainment for drivers staying overnight (bar/lounge area)
 - Shower facilities generally seen as better than MSAs
- Notwithstanding, **capacity can still sometimes be an issue**; particularly after a certain hour
 - Road surface also criticised

"You can get a pint of beer and a carvery which is within your meal voucher, you can watch TV screens in there."

Birmingham, Male

"The staff are happier and friendly, it's a much more personal experience than that found in the service station."

Birmingham, Male

"Most truck stops, you feel more secure than you would at a Motorway services. A truck stop's got a 24 hour security man on the barrier."

Ipswich, Male

All drivers reported using laybys; often considered a necessary/useful evil



- Laybys said to provide more security than MSAs because of parallel parking
 - But spaces are limited and often full by continental drivers avoiding payment

- Some of the specific issues identified with laybys are:

- Too close to the road (endangering drivers and other road users) and noisy
- No toilets, leaving drivers to have to relieve themselves outside
- Poorly signed and dark
- Difficult to get in and out of – slip roads very short

"A toilet would be handy at these laybys."
Birmingham, Male

- Against this backdrop, drivers often choose retail parks and industrial areas, which offer free parking, food, lighting and CCTV
 - French Aires de Service and MSAs abroad all said to be better and cheaper in general
- Drivers are open to the idea of 'enhanced laybys' but question facilities being clean and maintained
 - Minimum requirements would be: separation from road, toilets/showers, tables/benches, food truck
- Drivers also open to closing laybys, but only if lack of capacity is compensated elsewhere

"Some of the laybys you park up and want to get out and have a walk, but there's nowhere to walk to. Others are a bit set back from the road and have a nice treeline and wooden bench and table available. So you don't feel so much of an idiot when you stop there."

Birmingham, Male

"I think they're dangerous. I will never ever go in them unless I really, really have to."

Ipswich, Female

Stakeholder views: road and capacity issues are jeopardising the industry by making it less attractive



- We spoke to 2 Freight/Haulage Associations, 3 freight operators and 1 trade union
 - Broad number of members, drivers, vehicles and roads used
- General feedback supports that of HGV drivers
 - Increased traffic on roads
 - Road works not properly managed
 - Lack of capacity for lorry drivers to take breaks – particularly at MSAs (top priority)
- The impact on driving times and tacho restrictions is significant
 - Drivers having to stop in laybys/retail/industrial parks or prohibited places (slip roads, residential areas, hard shoulders) and risk getting fined or prosecuted
- As a result, drivers are quitting and fewer new drivers are joining

"If the drivers have facilities in their cab they'll stop in industrial estates or use client facilities but this is unusual and not what we want for them"
Freight/Haulage Association

"We've seen and heard of drivers parked on the M1 and M25 under bridges and on hard shoulders. It's far from ideal but what can they do?"
Trade Union

"There is a growing concern about congestion and the impact it has on efficiency, working conditions and the ability to meet end customer demands. Road works just make matters worse."
Freight/Haulage Association

"In general the welfare facilities within the UK are extremely poor, especially in comparison to our European neighbours."
Freight Operator

"If a driver is involved in an accident and he's past his tacho limit, he could go to jail. That's why it's better to stop on a hard shoulder or slip road and get fined than to go over your driving limit."
Freight Operator

"A big issue is the unpredictable road closures at night, sometimes even at 8pm when there is still commuter traffic; it creates chaos."
Freight Operator

"Drivers are not offered the facilities they demand or indeed deserve. This is one of many reasons why the industry suffers from a shortage. Why would anyone choose a career that in a number of cases treats them as a second class citizen?"
Freight Operator

Stakeholder views: there is a lack of capacity and decent facilities for drivers, particularly those overnighting



- MSAs not designed for lorry drivers – few seen to be investing in improvements
 - Expensive parking/food/fuel
 - Lack of capacity
 - Poor overnight facilities (e.g. showers)
 - Little security
 - Mostly fast food

“MSAs are all about revenue, not rest! They are encouraging drivers to take their breaks at the wheel and not get out of their trucks”
Freight Operator

“MSAs have not regarded lorry drivers for their market, they must not give them a big enough return because they just don’t seem interested.”
Freight/Haulage Association

“MSA providers are more interested in getting their overnight parking fee than making facilities secure for drivers.”
Freight Operator

“We are becoming worried about heart conditions and diabetes among our members, fast food doesn’t help.”
Freight/Haulage Association

- Truck stops perceived better than MSAs overall
 - Lower prices for food/parking
 - More tailored facilities for drivers
- However, there are issues
 - Variable quality and lacking in number
 - Often have to detour miles to get to one
 - Lack of capacity

“Trucks stops are better priced and have better capacity but for this reason they’ve become really popular”
Freight Operator

“The family who run the lorry park in Exelby know their business and what they need to provide drivers with, but investment is insufficient.”
Freight/Haulage Association

“Lorry parks should expand and be promoted because they know their HGVs!”
Freight/Haulage Association

“Lorry parks operators don’t like putting concrete down because taxes go up”
Freight/Haulage Association

- Laybys provide a cheap alternative – make up for lack of capacity elsewhere, however:
 - There are less of them
 - Alternative stops not being provided

“It’s fine if they want to close laybys for security reasons, but where are the drivers supposed to go if there is no room anywhere else?”
Freight Operator

“We don’t want to see our members parking in laybys either, but what choice do they have?”
Trade Union

Stakeholder views: missed opportunities in resolving the issue; Highways England must work with local authorities



- The largest problem is obtaining planning permissions and funding for new lorry facilities
 - Projected lorry parks take up to 10 years to be built
 - Developers hit dead ends and give up
 - Little help or involvement from the government in this stage
- Few improvements have been noticed, and there is still a lot of work to be done
- Proposed solutions include:
 - Utilising opportunities for mixed use lorry hubs with retail distributors, at warehouses, etc.
 - Setting minimum standards for lorry facilities, which currently don't exist
 - Encouraging the cooperation of local councils with Highways England and developers to speed up permissions and planning for new lorry parks

"Distribution centres will turn drivers away if their slot is not until tomorrow, and they are only ever used during the day."
Trade Union

"RHA would be happy to campaign for drivers to use MSAs and to shut the laybys if MSA standards improve and minimums are set. We'd do this even if it cost more money!"
Freight/Haulage Association

"The simple truth in the UK is that our truck stop facilities and locations are insufficient and need investment from the private or public sector. The planning consent process with local authorities is critical to this."
Freight Operator

"It is a welcome relief to note the development of the new A14 Rothwell truck stop commencing with a 'model' truck stop. I just hope the finished product lives up to its plans and commitment."
Freight Operator

"We've tried to get insurance companies involved in the security aspect (or lack of) at MSAs, because it could save them a lot of money."
Unite

"The Department for Transport released a report highlighting the issues related to lorry parks in 2011, but nothing has been done about it since then"
Trade Union

"Highways England should be facilitating getting planning consents to overcome the barriers for developers."
Freight/Haulage Association

"Highways England and the DFT need to take responsibility for MSA standards in terms of lorry provisions, just like they do for road surface and information."
Freight/Haulage Association

Other insights



MSAs seen to provide environment for 'rest & recovery' for most drivers, except HGV, who feel that a lot could be improved



- Leisure drivers generally feel rested and safe to drive after a short break at an MSA
- When probed, some mention they would like to see quiet 'nap areas' like at some airports
- Views on MSAs selling alcohol mixed; a few are not keen, but not a major issue for most

"They should have 'powernap' rooms available"
St. Albans, Male



- Business drivers' breaks tend to be short, in the interest of time
- Therefore, they generally feel that the time they spend at MSAs is enough to 'recover'
- They also think that there is nothing wrong with selling alcohol, as long as drivers are responsible

"You only ever just want to leave, not stop for six hours."
Norwich, Male



- Professional drivers' views similar to business – generally on their way quickly
- 'Getting a coffee' and 'stretching their legs' is enough to feel safe to keep driving
- When probed, they do not have anything against MSAs selling alcohol

"You have a quick rest and then you just carry on. That's all you need and that's enough for me."
Norwich, Male



- HGV drivers feel the least 'relaxed' and 'recovered' after stopping at an MSA
 - Views are that, although they have improved, there are still major gaps
- Parking is the biggest issue for them – particularly for overnight drivers
 - Lack of security, noise, and distance from main building key issues inhibiting effective recovery
 - Truck stops seen to perform better in this sense and ensure more 'restful' experiences
- Majority of neutral views regarding the sale of alcohol; overnight drivers prefer there being bars to help them 'disconnect'

"You shouldn't have to detour 16m. to find a decent place to park"
Trade Union

"I would like a nice little lounge where I can get a drink and watch the football."
Birmingham, Male



Awareness of MSA ownership low salience and limited; more competition desired to lower prices, but fears that consistency will be at risk

- Drivers' knowledge of MSA ownership is vague at best, and a very low salience topic
 - Many go as far as associating the MSA operators to certain establishment brands
 - A few perceptions that some are investing more than others in facilities

"Road Chef sounds familiar but I don't know what it means..."
St. Albans, Leisure, Male



- Little to no awareness about who regulates MSAs, although they do 'assume' that there is some sort of governing body

- Stakeholders (particularly freight/haulage associations) have a better understanding of the different brands and how they work
 - More knowledge regarding levels of investment of some operators vs others
 - Do not know the extent of Highways England's involvement, but think that minimum standards should be set by those 'in charge'



"It says Moto or Extra above the sign and then the brands below, I think those are the names of the actual service stations."
Norwich, Business, Female

"There is a Burger King and Waitrose at Fleet so I imagine they own it..."
Newcastle, Leisure, Male

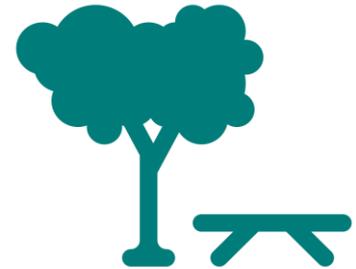
"The different owners (Moto, Welcome Break) are in different stages of the investment cycle for their stations. Some are more open to investing in the lorry side of it than others."
Freight/Haulage Association

- More competition is desired by all because respondents' think it will help improve services and reduce prices
 - However, drivers do not want this to jeopardise the consistency and reliability offered by MSAs



MSAs could be made more 'attractive' without turning them into a destination in their own right

- Drivers do not want to see MSAs expanded to become destinations in their own right
 - They think this will increase traffic
 - Don't see the point – need already fulfilled by retail parks
- Overall impression is that MSAs should not encourage drivers' to stay longer than they need to
 - However, many think that some provisions could be 'enhanced' to ensure a more pleasant experience
 - Many mention Tebay and Gloucester as examples of this
- Improvements that would make MSAs 'more attractive'
 - Local produce providers
 - More green areas and outdoor facilities (including dog walking areas)
 - Phone charging units & decent Wi-Fi
 - More comfortable indoor seating



"There could be more scope for people to feel more refreshed at service stations. This could be in the form of comfy sofas, massage chairs, aromatherapy or juice bars."
Newcastle, Business, Female

"They are a necessity; we don't want anymore crowds there than absolutely necessary."
Norwich, Professional, Male

"All the facilities are inside at many of them; it would be good to see more green spaces and playgrounds for kids to run around in"
St. Albans, Coach driver



People with disabilities: generally reflective of the findings as a whole, although a few one-off suggestions – generally around disabled toilets

"Laybys should be more like Aires in France, with picnic benches so that you could stop to rest without relying only on MSAs and other 'A' road services."
Norwich

"It would be nice if the MSA had a comfortable area to sit that's not the food court... like at train stations."
Norwich

"I think MSAs have fantastically improved."
Newcastle

"There are plenty of disabled spaces and they are ample and near the entrance of the service station."
Newcastle

"I've sometimes found that on 'A' roads, signs will say services but no opening hours, then I pull off for a rest and it's all closed."
Norwich

"The only trouble with the car park is it's on a slope so when loading and unloading the power chair it can be quite difficult so it would be easier if the disabled parking spaces were on level ground."
MSA

"Certain service stations offer smaller retail outlets such as M&S which is ideal for something to eat."
Newcastle

"I went into the wheelchair accessible toilet and it will be full of bins so you can't even get a wheelchair in there."
MSA

"The disabled toilet door's left open, the general public use the disabled loo, although there's general loos available."
MSA

"You have to be aware that you will pay more; it's got a stigma which puts people off. But I just accept it; you pay more in lots of places."
Newcastle

"I also remember at Hopwood, the disabled toilet is just at the back of one of the shops, you have to go through the stands in the shop to get to it and when you got there it was extremely cramped."
MSA

"Generally free standing chairs without arms are a lot better for people with wheelchairs so they can do a transfer on to a seat."
MSA



Other insight and objectives...

Objective	Insight
Investigate the degree of pre-planning	<ul style="list-style-type: none">Leisure: limited stop planning based on assumption that there will be adequate MSA provision. That said, familiar / frequent routes, along with children and elderly passengers results in some formal planningBusiness: seldom plan unless route is well knownProfessional: preferred stops are more common. Some evidence of diverting to supermarkets/ retail parks for 'better deals'HGV: limited planning / based on journey circumstances
Examine rationale behind choice of facilities	<ul style="list-style-type: none">Overall, the conversation centred on MSAs (leisure and business users had little to say about trunk road and layby facilities). MSAs were seen to meet most core needsMany professional drivers diverted to 'A' roads to gain better value food and drinkSome HGV drivers preferred truck stops, believing them to offer a more welcoming environment, along with facilities more targeted to their needs
Destination in own right	<ul style="list-style-type: none">Vast majority do not want the MSAs to be destinations in their own right. Assumed to increase traffic / footfall / need explicitly addressed by retail parks
Safety / security	<ul style="list-style-type: none">Most consider MSAs to be safe and secure. The exception being overnight HGV drivers where lighting / CCTV and fencing were considered inadequate
Importance of well known / familiar brands	<ul style="list-style-type: none">Few choose one MSA over another based on the MSA operator. The familiarity of established / well known restaurant / shop brands did play a part in decision making