



Motorway Services User Survey 2018

Overall report



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Background and approach



Project 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 their work, Transport Focus wanted to measure how well Motorway Service Areas (MSAs) are meeting the needs of different SRN user groups. Last year, Transport Focus engaged Populus to conduct an inaugural survey of user satisfaction with MSAs. This has now been repeated for 2018, again conducted by Populus, after Transport Focus secured financial contributions from the sector.

Specific objectives for 2018 included to:

- ✓ Consistently and robustly measure user satisfaction across all MSAs and consistent with 2017
- ✓ Understand the effect visiting an MSA has on visitor temperament
- ✓ Identify the key drivers of satisfaction and intention to revisit.



Project approach

Interviews took place at 111 out of the 112 official MSAs in England*, achieving 9626 responses across six MSA operators – Euro Garages, Extra, Moto, Roadchef, Welcome Break and Westmorland

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

2018 fieldwork – 12th Feb to 12th April

2017 fieldwork – 13th Feb to 9th April

Four six-hour interview shifts and one three-hour shifts were completed at each individual MSA, split 60/40 across weekdays and weekends.

Each MSA is equally weighted within the data, meaning each site counts equally towards overall results.

*Folkestone Services chose not to participate in this year's survey

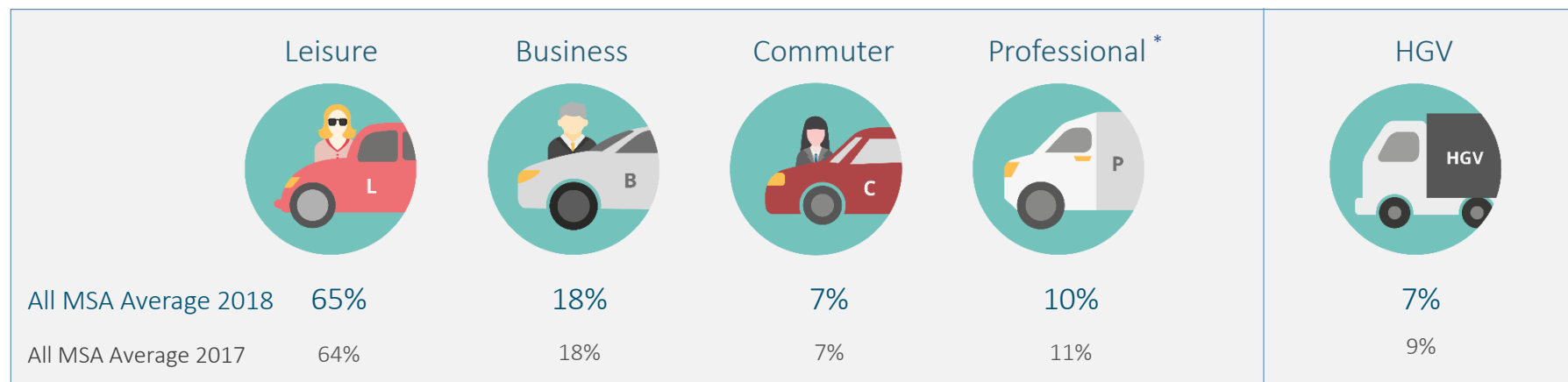
SECTION 1

Usage patterns

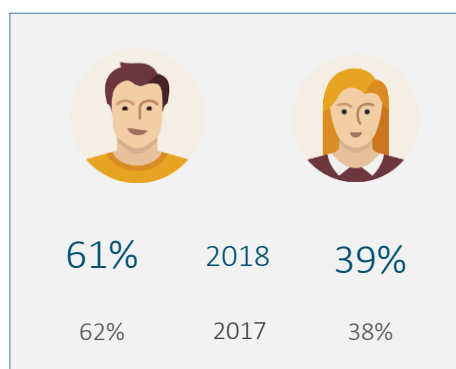
Respondent profile

The profile of MSA visitors interviewed in 2018 is in line with last year, with two thirds travelling for leisure. Visitors were typically male, 35+ and travelling by car.

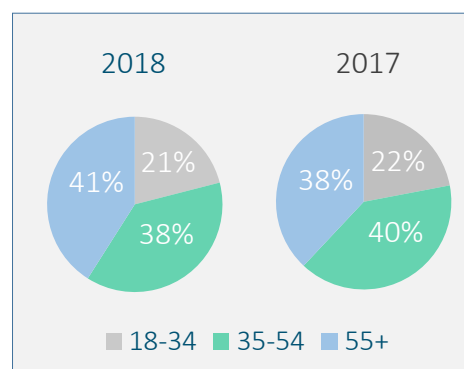
Visitor type



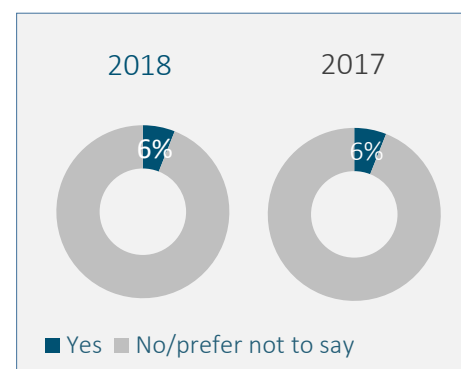
Gender



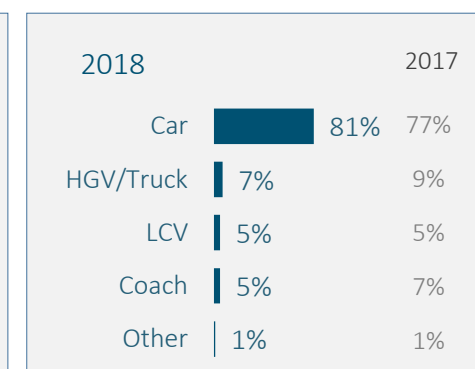
Age **



Disability



Vehicle type



Q1 Driver Type, Gender, Q23 Age, Q6 Vehicle Type, Q35 Disability

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

* Approximately three quarters of professionals were driving an HGV or truck

** Base 3865, excludes 54 who 'preferred not to say' for 2018 and 33 for 2017

Respondent profile by visitor type

As with last year, leisure visitors have a fairly even gender split, while all other visitor types are more likely to be male

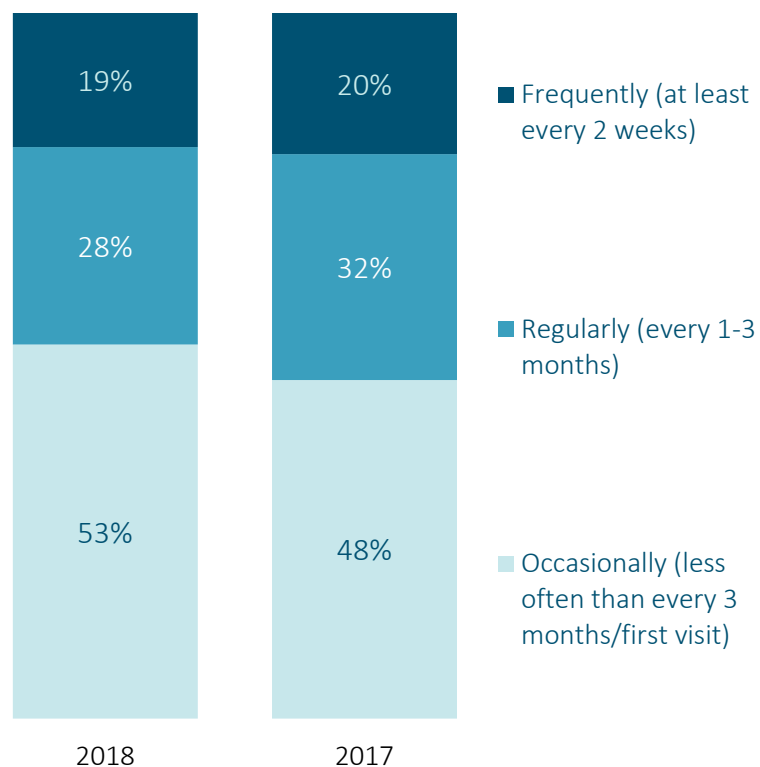


ALL MSA AVERAGE 2018	Leisure	Business	Commuter	Professional	2018 All visitors
Male	49%	77%	73%	97%	61%
Female	51%	23%	27%	3%	39%
18-34	20%	21%	36%	16%	21%
35-54	33%	47%	43%	51%	38%
55+	47%	32%	21%	33%	41%
Disability	8%	2%	3%	2%	6%

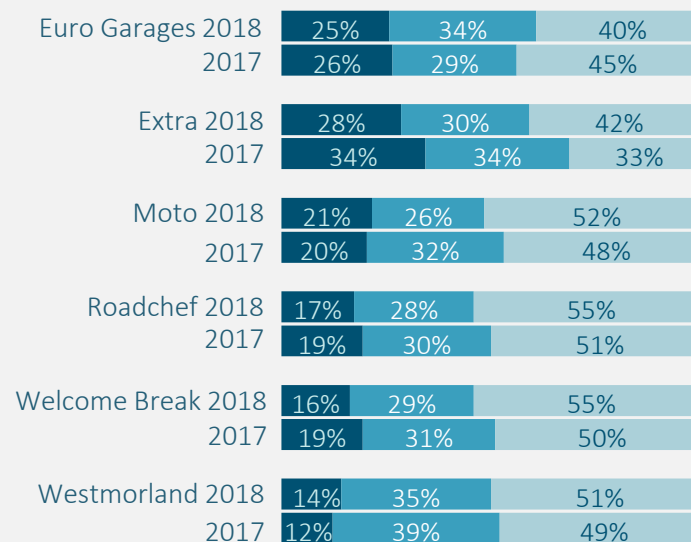
ALL MSA AVERAGE 2017	Leisure	Business	Commuter	Professional	2017 All visitors
Male	51%	77%	71%	97%	62%
Female	49%	23%	29%	3%	38%
18-34	22%	21%	36%	15%	22%
35-54	34%	51%	43%	53%	40%
55+	44%	28%	21%	32%	38%
Disability	8%	2%	4%	7%	6%

Frequency of visiting this MSA (1)

Over half of visitors are only occasional users of the MSA at which we spoke to them, a slight increase on last year. Extra has a higher proportion who visit fortnightly.



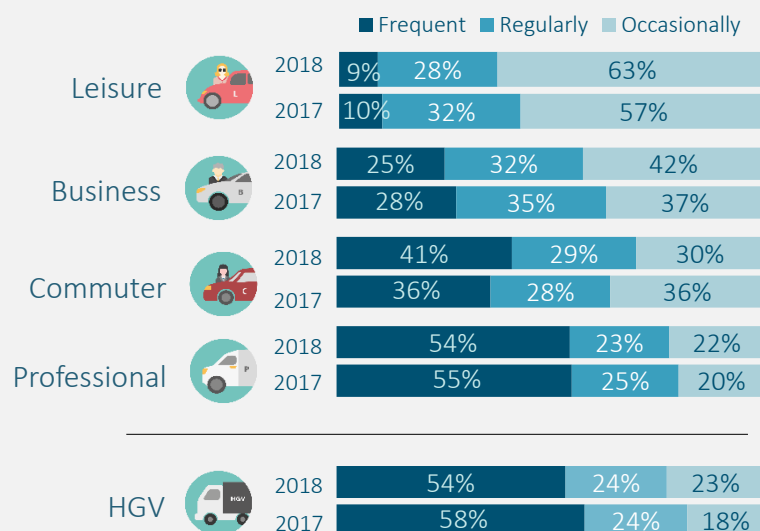
Operator comparison



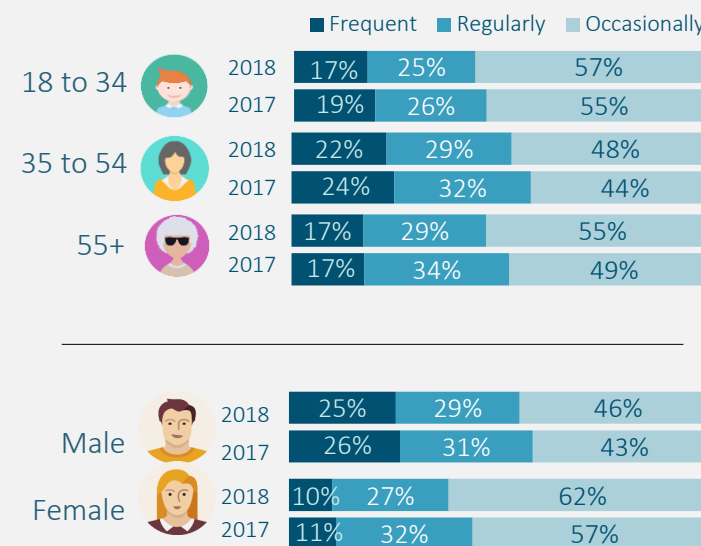
Frequency of visiting this MSA (2)

Frequency of repeat visiting is higher among professional than non-professional drivers, although commuters are visiting slightly more often than 2017

Frequency of visiting this MSA
by visitor type

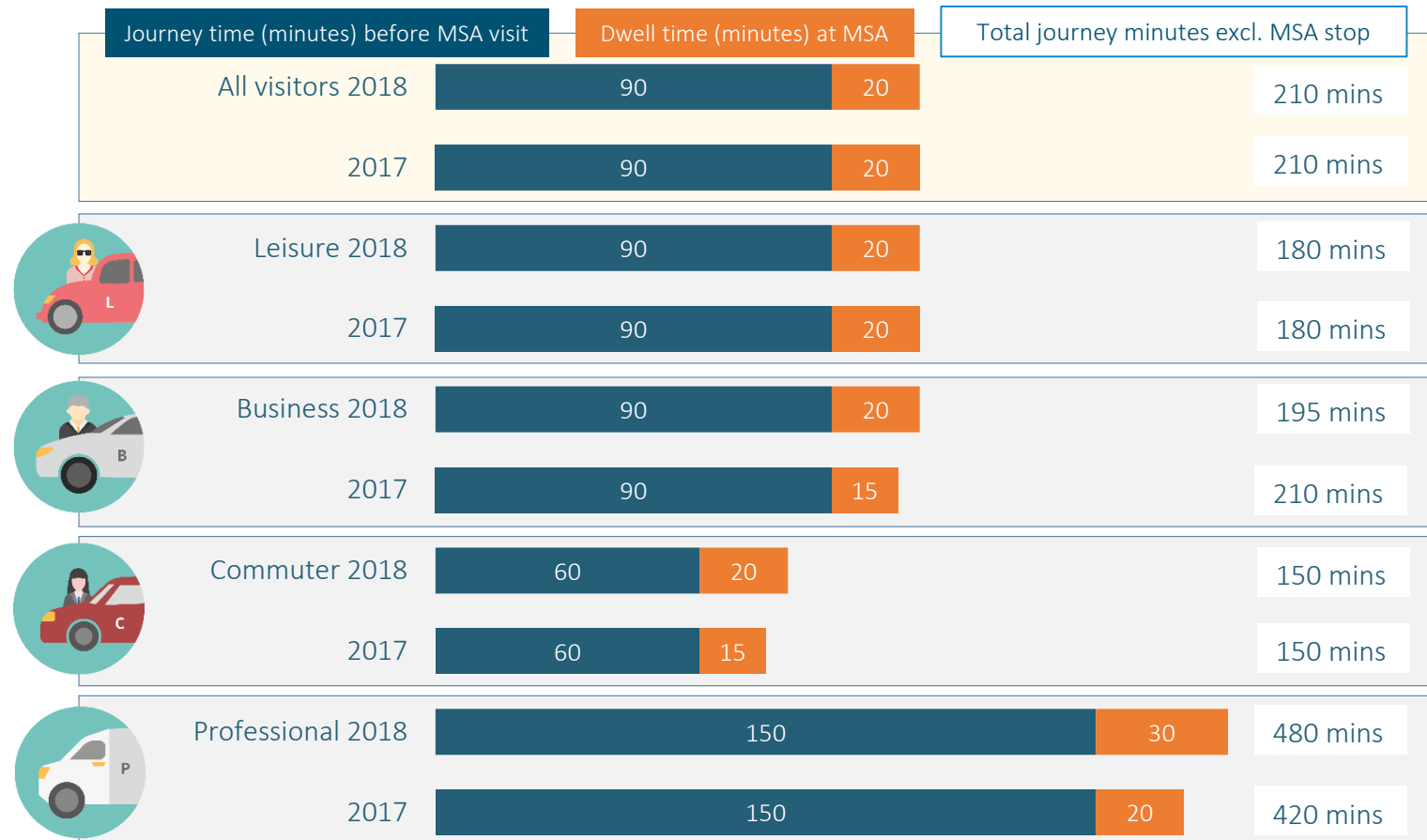


Frequency of visiting this MSA
by demographics



Typical journey length and dwell time*

Typically, visitors stopped at an MSA after 90 minutes on the road, for a period of 20 minutes, in line with last year. Dwell times have increased for business, commuter and professional visitors, but remained consistent for leisure passengers



* Based on median rather than average values
(median is the midpoint value)

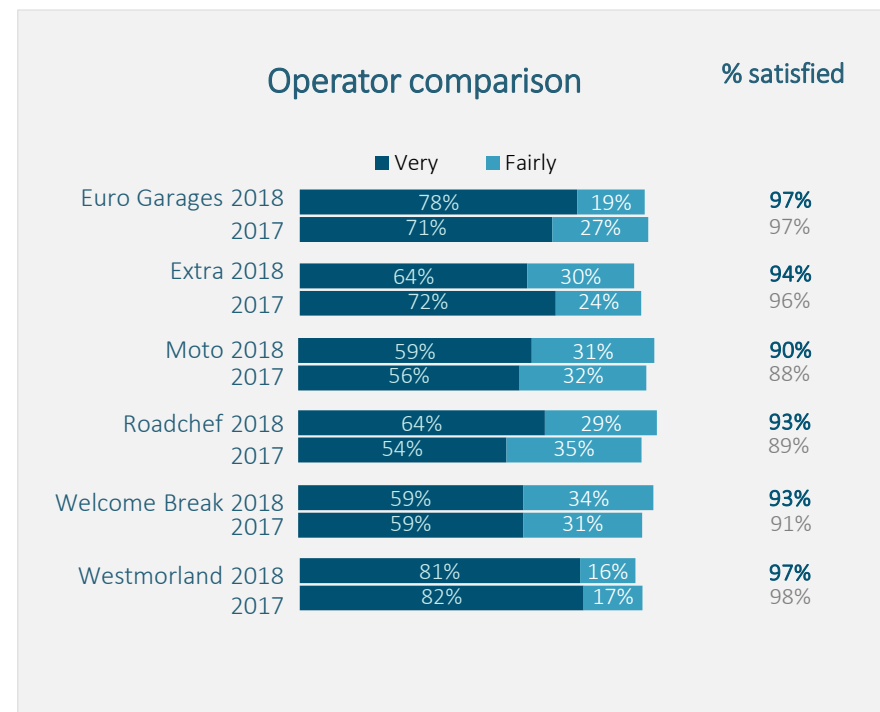
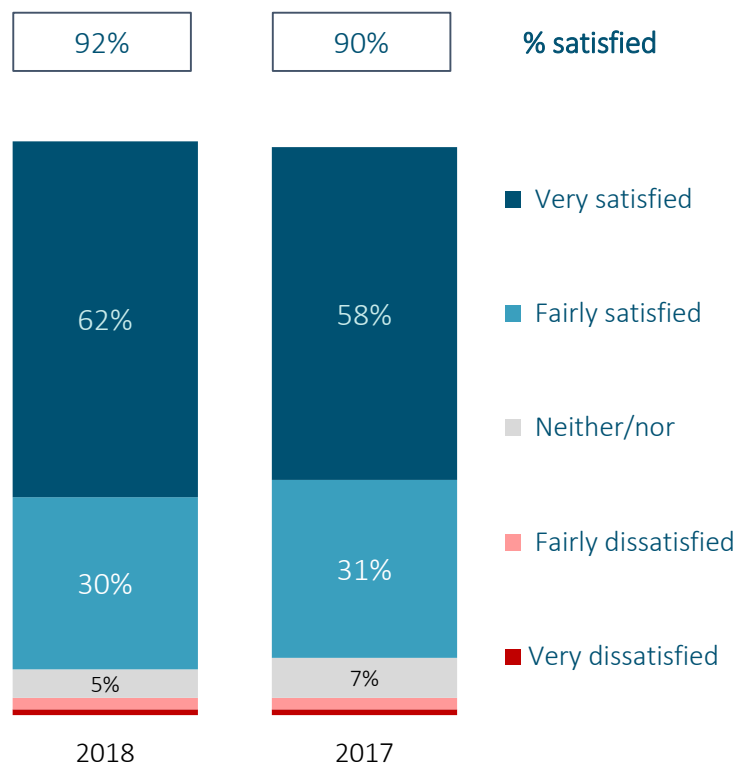
Time coded in 15min
slots

SECTION 2

Overall experience

Overall satisfaction (1)

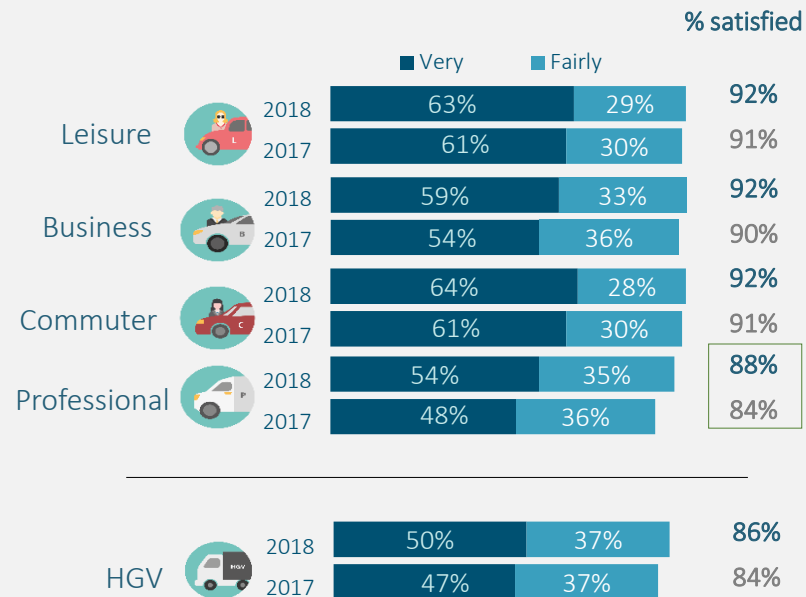
Satisfaction has marginally improved since 2017, with 92% of all visitors satisfied with their overall experience. Satisfaction is highest among visitors at Euro Garages and Westmorland services



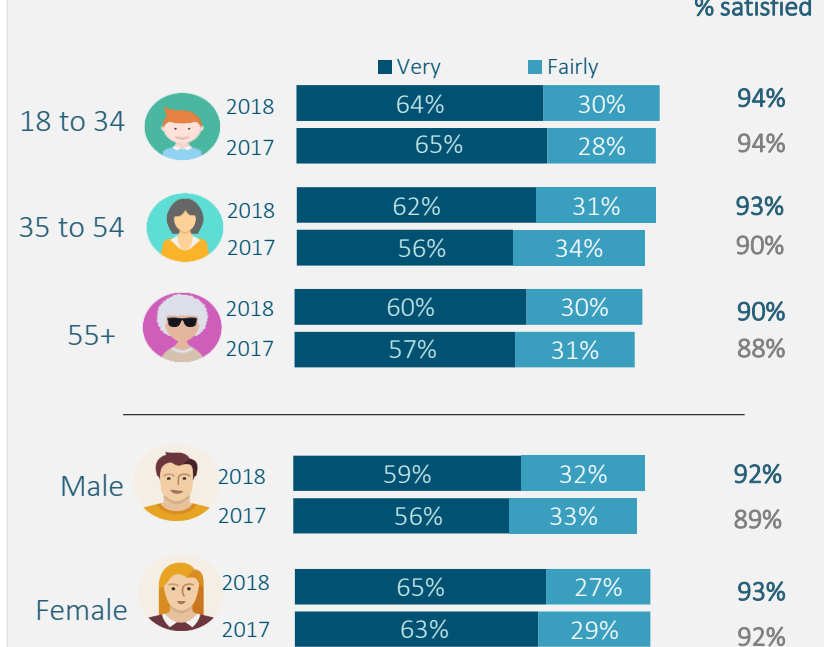
Overall satisfaction (2)

Satisfaction remains slightly lower amongst professional visitors (88%) than non-professional visitors, despite their having the biggest year-on-year increase across all visitor types

Overall satisfaction
by visitor type



Overall satisfaction
by demographics



Overall satisfaction by individual Motorway Service Area

15 individual MSA's have seen a significant increase in satisfaction scores since 2017, where as four have seen a significant decrease

Fairly/very satisfied

Motorway Service Area	2018	2017
Baldock	96%	96%
Beaconsfield	94%	97%
Birch EB	87%	89%
Birch WB	97%	92%
Birchanger Green	96%	95%
Blackburn with Darwen	94%	96%
Blyth	98%	95%
Bridgwater	81%	79%
Burton-in-Kendal	93%	91%
Burtonwood	83%	89%
Charnock Richard NB	93%	91%
Charnock Richard SB	92%	89%
Cherwell Valley	91%	96%
Chester	97%	96%
Chieveley	91%	86%
Clacket Lane EB	83%	79%
Clacket Lane WB	94%	92%
Cobham	91%	97%
Corley NB	98%	99%
Corley SB	99%	93%
Cullompton	93%	97%
Doncaster North	96%	94%
Donington Park	97%	95%

Motorway Service Area	2018	2017
Durham	95%	96%
Exeter	92%	84%
Ferrybridge	87%	90%
Fleet NB	96%	91%
Fleet SB	98%	90%
Frankley NB	99%	94%
Frankley SB	91%	95%
Gloucester NB	94%	99%
Gloucester SB	97%	99%
Gordano	95%	84%
Hartshead Moor EB	92%	91%
Hartshead Moor WB	88%	94%
Heston EB	88%	62%
Heston WB	87%	90%
Hilton Park NB	93%	96%
Hilton Park SB	99%	96%
Hopwood Park	97%	95%
Keele NB	97%	87%
Keele SB	91%	82%
Killington Lake	99%	90%
Knutsford NB	94%	85%
Knutsford SB	98%	99%
Lancaster NB	90%	82%

Motorway Service Area	2018	2017
Lancaster SB	87%	90%
Leicester Forest East NB	83%	93%
Leicester Forest East SB	91%	95%
Leigh Delamere EB	85%	85%
Leigh Delamere WB	91%	86%
London Gateway	96%	91%
Maidstone	87%	91%
Medway EB	85%	87%
Medway WB	97%	84%
Membury EB	95%	77%
Membury WB	95%	88%
Michaelwood NB	92%	89%
Michaelwood SB	96%	93%
Newport Pagnell NB	92%	95%
Newport Pagnell SB	81%	89%
Northampton NB	97%	91%
Northampton SB	97%	94%
Norton Canes	100%	99%
Oxford	88%	87%
Pease Pottage	99%	93%
Peterborough	97%	94%
Reading EB	89%	96%
Reading WB	89%	100%



 A significant change from last year; that is less than a 5% likelihood of the change arising from natural sampling variations.

Overall satisfaction by individual Motorway Service Area

15 individual MSA's have seen a significant increase in satisfaction scores since 2017, whereas four have seen a significant decrease

Fairly/very satisfied

Motorway Service Area	2018	2017
Rivington NB	98%	100%
Rivington SB	97%	95%
Rownhams NB	93%	76%
Rownhams SB	87%	75%
Sandbach NB	98%	89%
Sandbach SB	90%	84%
Sedgemoor NB	93%	86%
Sedgemoor SB	95%	93%
Severn View	85%	83%
South Mimms	95%	96%
Southwaite NB	80%	93%
Southwaite SB	88%	84%
Stafford NB	94%	90%
Stafford SB	99%	70%
Strensham NB	93%	89%
Strensham SB	89%	93%
Tamworth	93%	95%
Taunton Deane NB	88%	93%
Taunton Deane SB	93%	96%
Tebay NB	99%	98%
Tebay SB	99%	98%
Telford	94%	96%
Thurrock	68%	81%

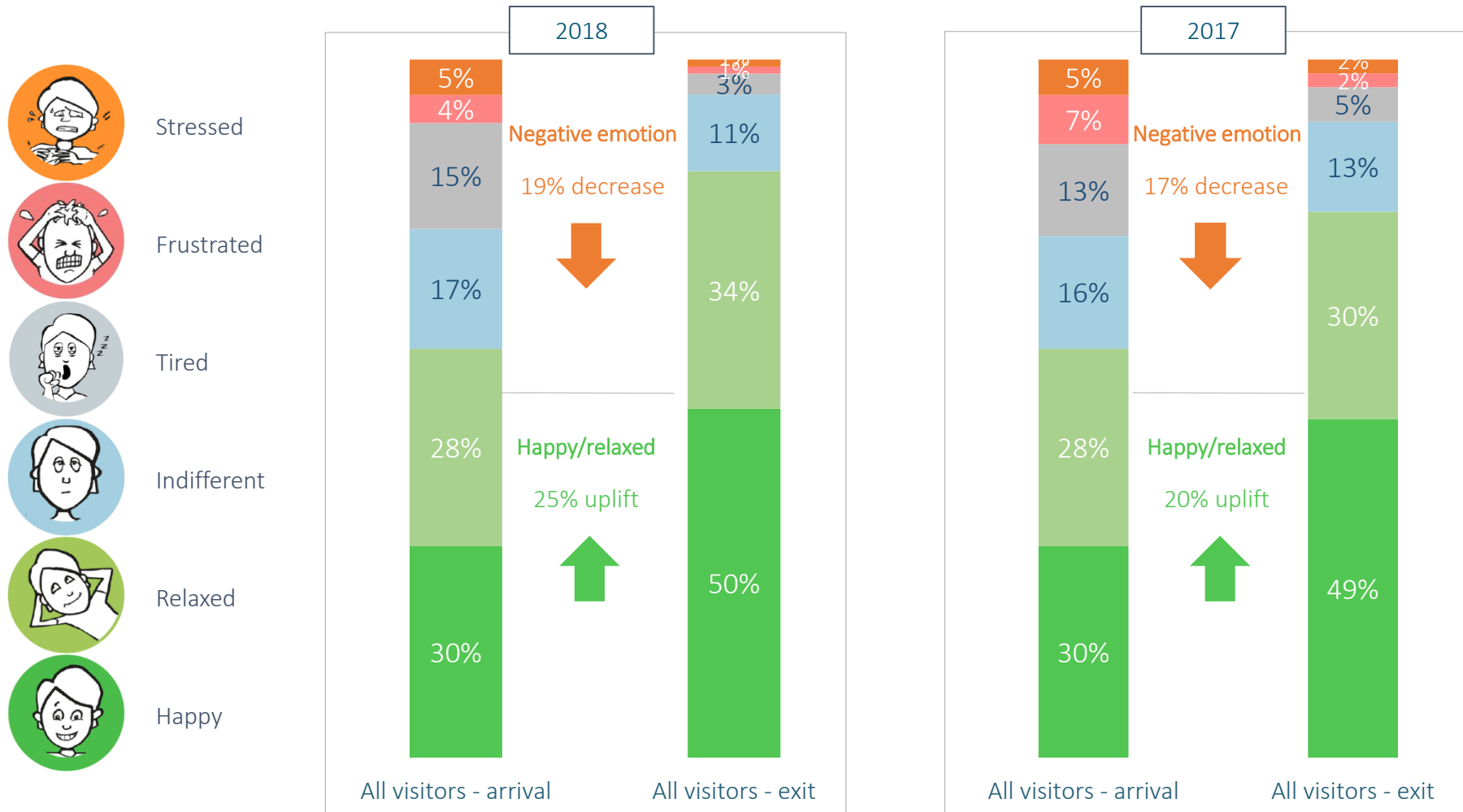
Motorway Service Area	2018	2017
Tibshelf NB	93%	94%
Tibshelf SB	95%	97%
Toddington NB	82%	86%
Toddington SB	72%	76%
Trowell NB	91%	91%
Trowell SB	92%	87%
Warwick NB	87%	90%
Warwick SB	90%	87%
Washington NB	90%	76%
Washington SB	89%	89%
Watford Gap NB	90%	93%
Watford Gap SB	91%	83%
Wetherby	99%	84%
Winchester NB	93%	84%
Winchester SB	84%	76%
Woodall NB	93%	92%
Woodall SB	99%	96%
Woolley Edge NB	89%	80%
Woolley Edge SB	88%	93%



A significant change from last year; that is less than a 5% likelihood of the change arising from natural sampling variations.

Mood on arrival and exit [all MSA visitors]

The reduction of negative emotion and the increase in positive emotion on leaving the MSA are both greater in 2018



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

Mood change between arrival and exit [by operator]

Welcome Break shows the greatest uplift in visitor mood; however their visitors are least positive upon arrival, meaning greater room to improve



Happy/Relaxed

Operator	2018		2017	
	Mood upon arrival	Uplift upon exit	Mood upon arrival	Uplift upon exit
Euro Garages	60%	27%	62%	21%
Extra	62%	26%	71%	15%
Moto	60%	22%	58%	20%
Roadchef	60%	24%	59%	20%
Welcome Break	53%	30%	54%	24%
Westmorland	73%	20%	60%	20%



Negative Emotion

Operator	2018		2017	
	Mood upon arrival	Decrease upon exit	Mood upon arrival	Decrease upon exit
Euro Garages	22%	19%	22%	18%
Extra	26%	21%	18%	13%
Moto	22%	17%	27%	17%
Roadchef	23%	18%	24%	17%
Welcome Break	29%	23%	25%	16%
Westmorland	14%	11%	27%	17%

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

Mood change between arrival and exit [by visitor type]

All visitor types experience a greater uplift in mood compared to last year. Professional visitors have seen the biggest uplift across all visitor types compared to the uplift seen in 2017



Happy/Relaxed

Visitor Type	2018		2017	
	Mood upon arrival	Uplift upon exit	Mood upon arrival	Uplift upon exit
Leisure	60%	25%	59%	21%
Business	56%	25%	55%	21%
Commuter	55%	26%	55%	20%
Professional	56%	23%	60%	16%





Negative Emotion

Visitor Type	2018		2017	
	Mood upon arrival	Decrease upon exit	Mood upon arrival	Decrease upon exit
Leisure	23%	18%	24%	16%
Business	24%	19%	28%	19%
Commuter	28%	22%	29%	19%
Professional	28%	21%	27%	17%




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

Mood change between arrival and exit [by journey time before stopping at MSA]

In line with 2017, the MSA stop had a particularly positive impact on the mood of visitors who had been on the road for over an hour before stopping

Happy/Relaxed

Negative Emotion

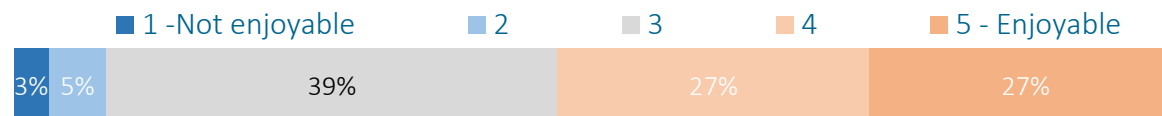
	2018		2017			2018		2017	
	Mood upon arrival	Uplift upon exit	Mood upon arrival	Uplift upon exit		Mood upon arrival	Decrease upon exit	Mood upon arrival	Decrease upon exit
Time before stopping					Time before stopping				
Up to 1 hour	64%	20%	63%	17%	Up to 1 hour	20%	14%	22%	15%
Over 1 hour to 3 hours	55%	28%	56%	23%	Over 1 hour to 3 hours	26%	21%	26%	17%
Over 3 hours before	55%	24%	52%	22%	Over 3 hours before	30%	23%	36%	24%

Attitudes towards MSAs in general

Over half of MSA visitors find stopping at MSAs in general enjoyable, although most agree that some are definitely better than others. Most also feel that introducing well-known brands has made the MSA better, but that they are annoyed by the higher cost of fuel than elsewhere



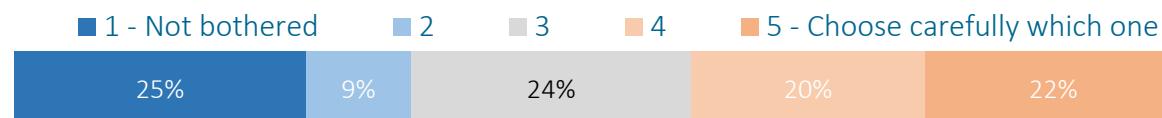
Stopping at Motorway Services is...



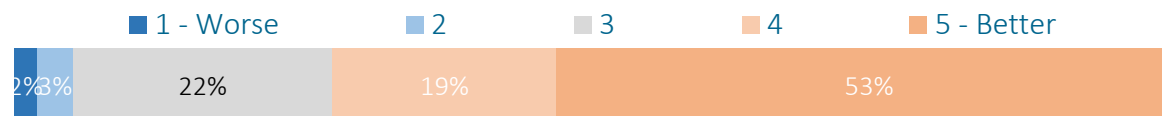
The standard of Motorway Services...



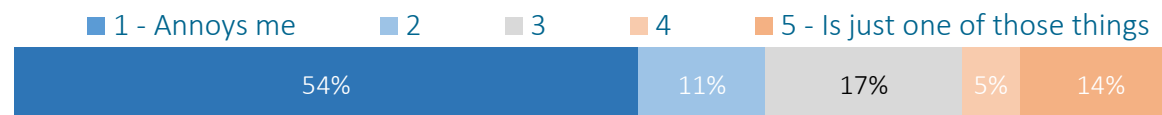
How fussed are you which Motorway Services you stop at...



Introducing well-known brands in recent years has made Motorway Services...



Fuel costing more at Motorway Services...



Positive comments around the MSA

Spontaneous comments from visitors who are satisfied with their overall experience refer to the service they received, the cleanliness of facilities and the variety available to purchase

"Doing a great job, keep smiling"
Professional, Welcome Break

"I am very happy with the staff and service provided in this area"
Commuter, Moto

"Had a nice rest! It is very clean and I always feel safe"
Business, Euro Garages

"A very good service that is quick and friendly"
Leisure, Welcome Break

"It's incredibly clean and tidy, a very good service all round"
Leisure, Roadchef

"This is a very nice and friendly services. It has a great selection of stuff to buy"
Leisure, Roadchef

"I like the variety of shops available"
Leisure, Extra

"One of the best services I have ever been to"
Leisure, Westmorland

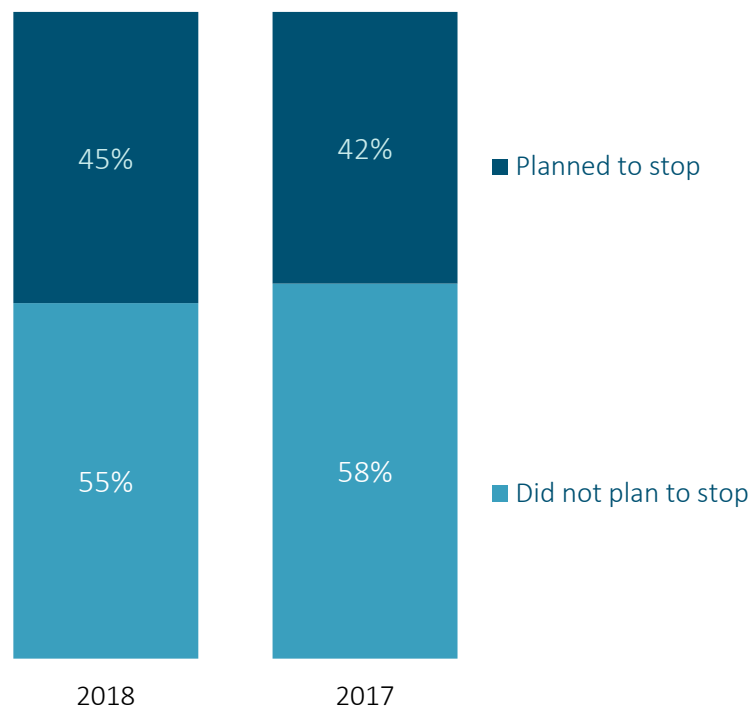
"Friendly staff with a nice and relaxed atmosphere"
Commuter, Moto

SECTION 3

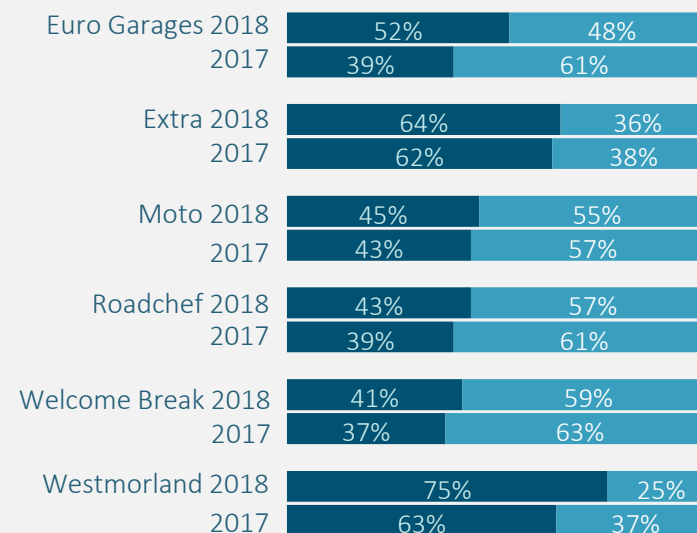
Reasons for visiting

Decision to stop at this MSA (1)

Marginally more visitors this year planned beforehand to stop at a particular MSA (45%). Visitors at Westmorland and Extra were more likely to plan to stop at the services beforehand in comparison to other operators



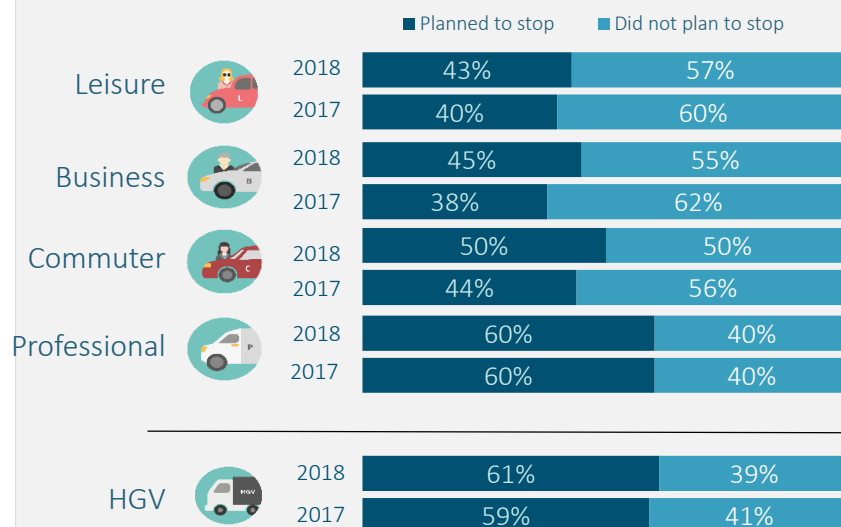
Operator comparison



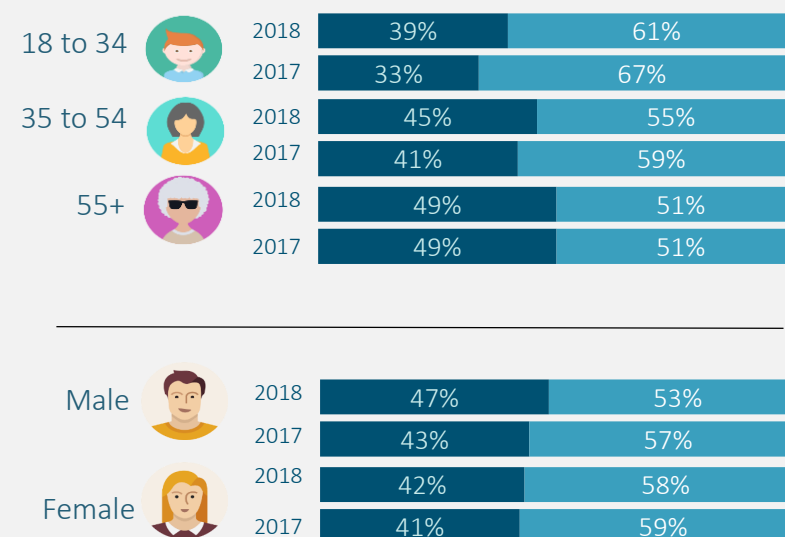
Decision to stop at this MSA (2)

More business and commuter visitors planned beforehand to stop at a particular MSA in comparison to 2017. For professional and HGV drivers three in five planned to stop beforehand

Decision to stop at this MSA
by visitor type

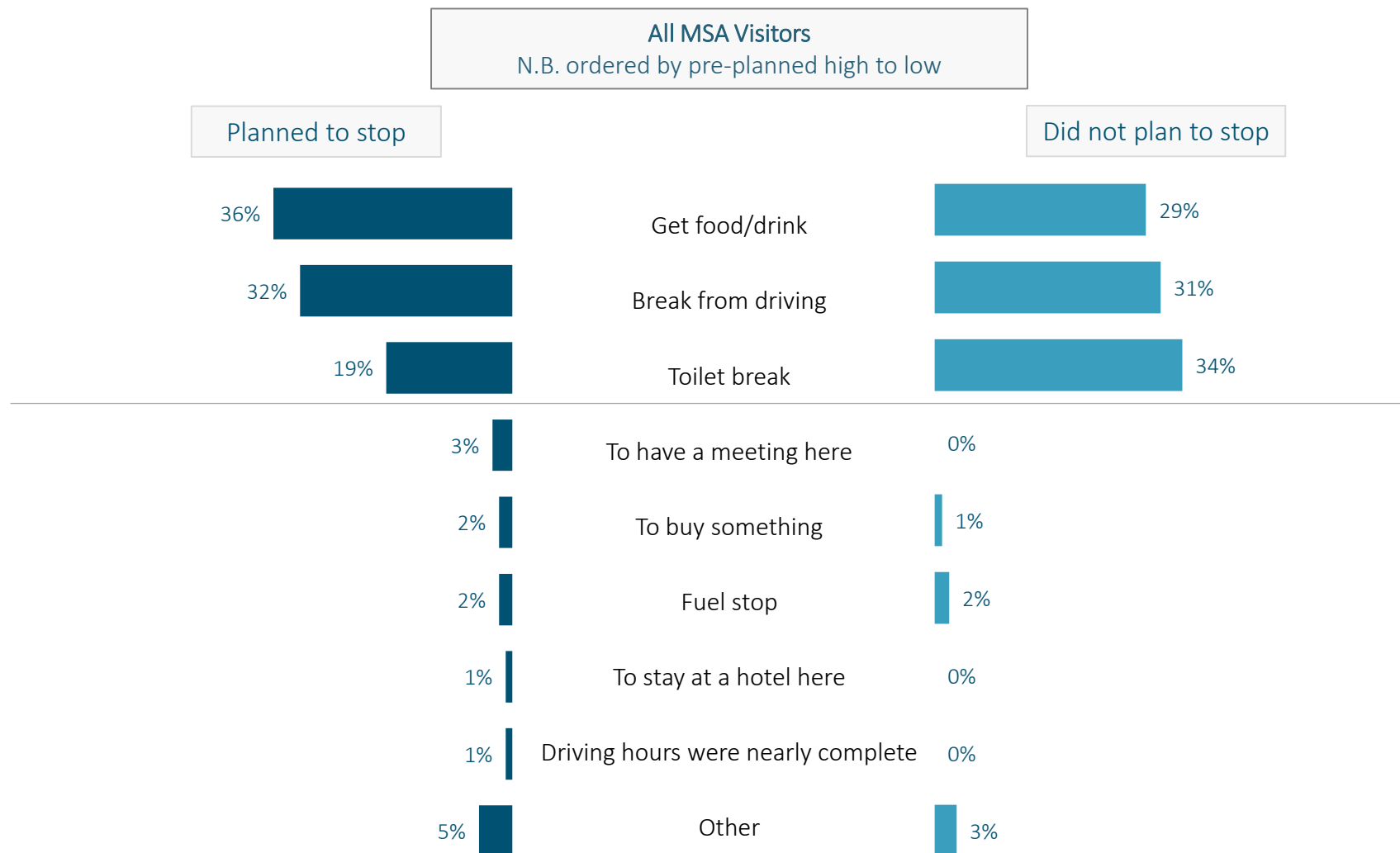


Decision to stop at this MSA
by demographic



Reasons for visiting

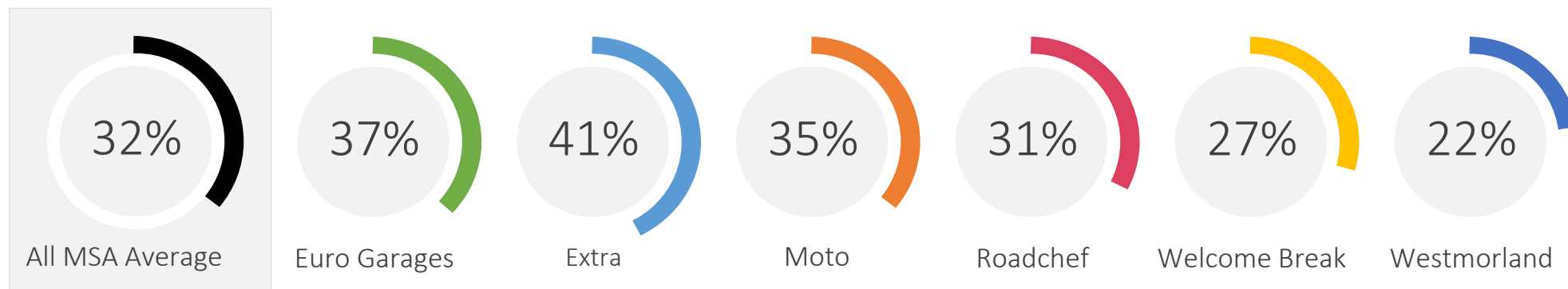
To get food and drink and to take a break from driving are important reasons for visiting an MSA, regardless of whether or not people planned to stop there in advance. Those not planning are much more likely to mention needing a toilet break



Brand impact on stopping

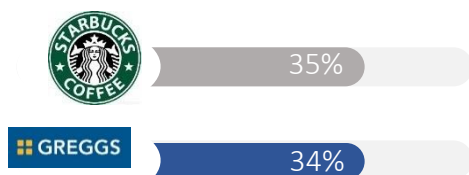
A third of all visitors were more inclined to stop because of specific brands on offer, increasing to 41% for Extra. On the whole, Costa, Starbucks, McDonald's, and M&S are the most influential brands

% saying any brand made them more inclined to stop at a specific MSA

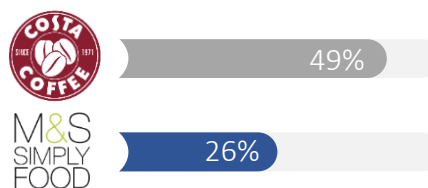


Top 2 brands mentioned

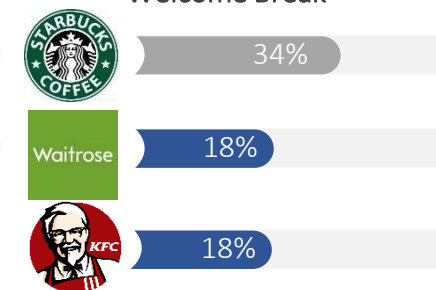
Euro Garages*



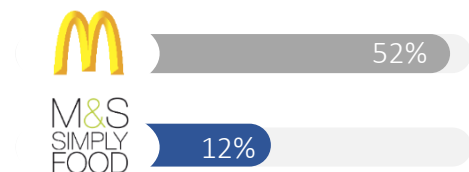
Moto



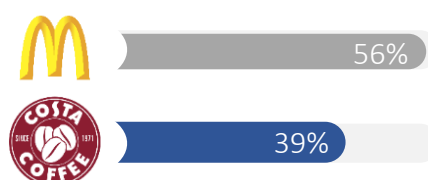
Welcome Break



Extra



Roadchef



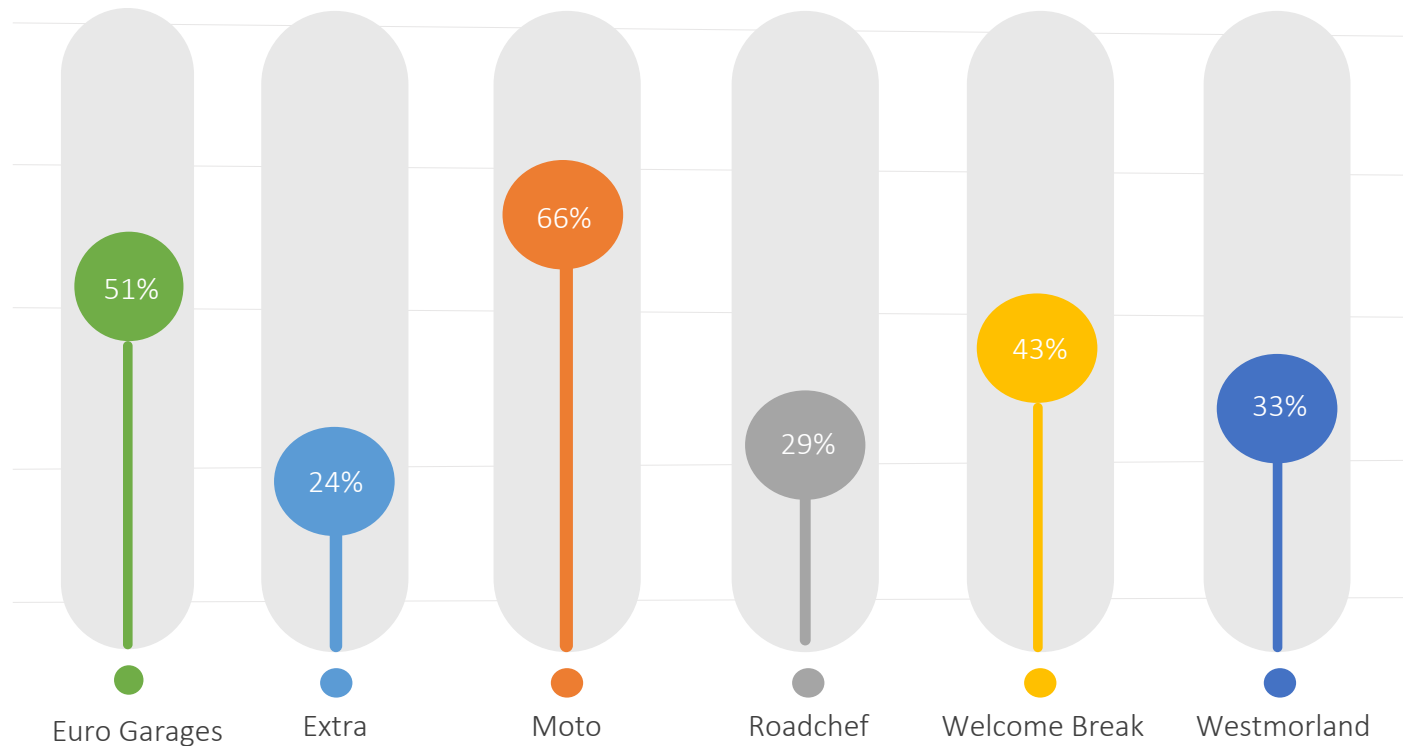
Westmorland*



Who runs this MSA

Moto is the most recognised operator amongst its visitors, with two-thirds identifying it correctly

% of visitors naming correct operator at own MSAs

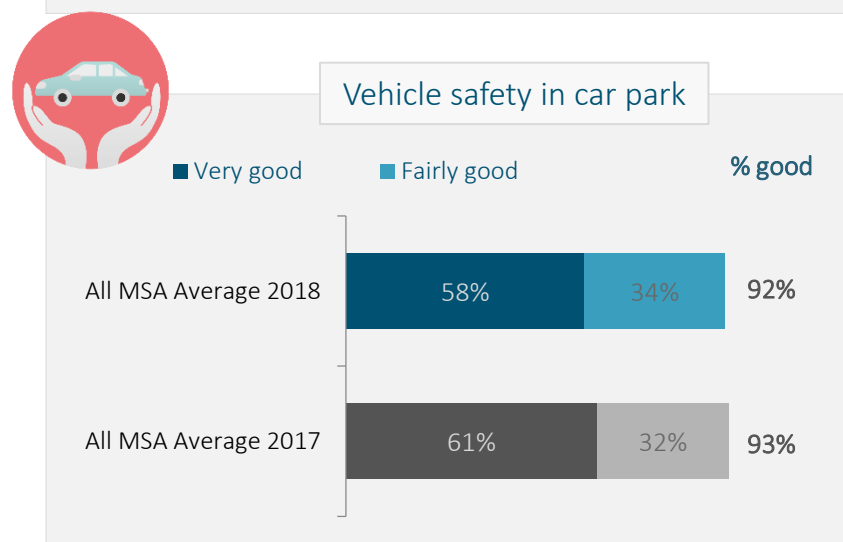
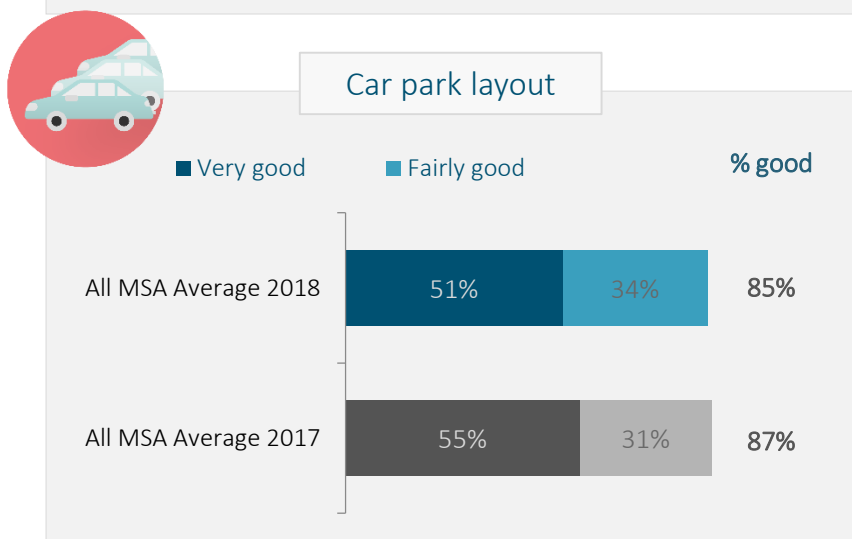
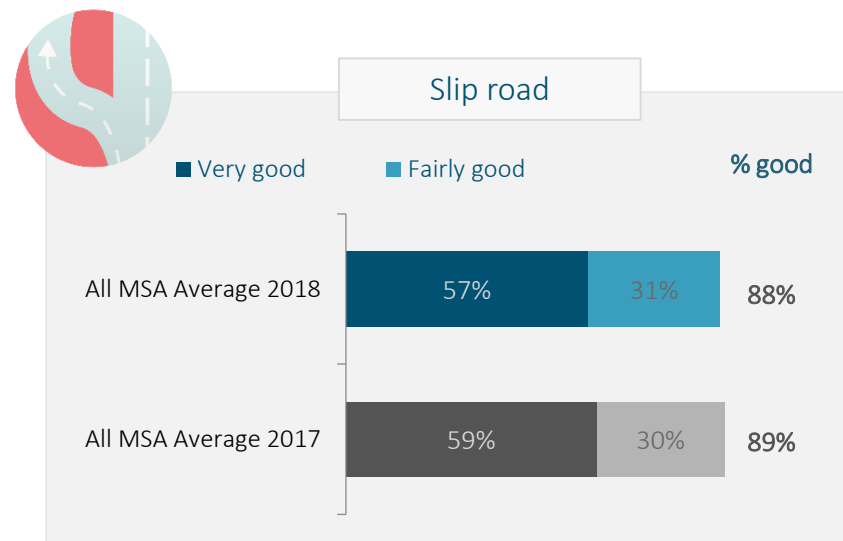
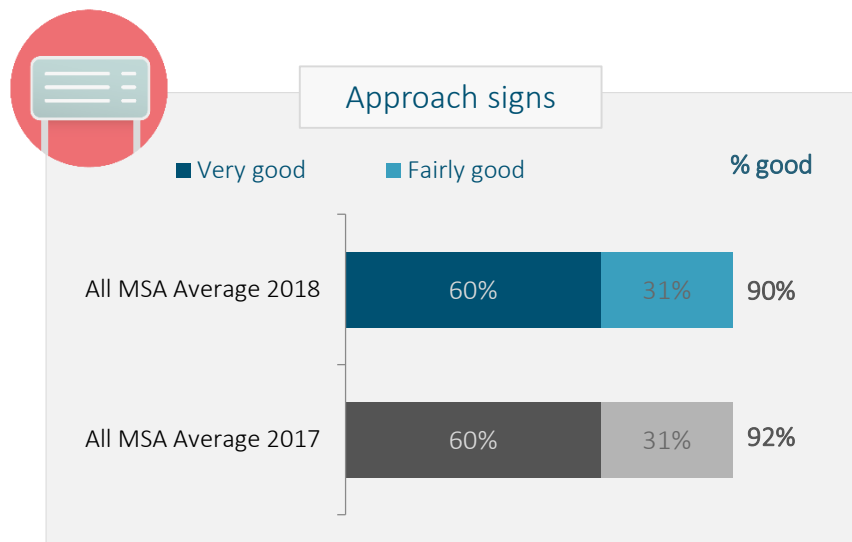


SECTION 4

MSA usage

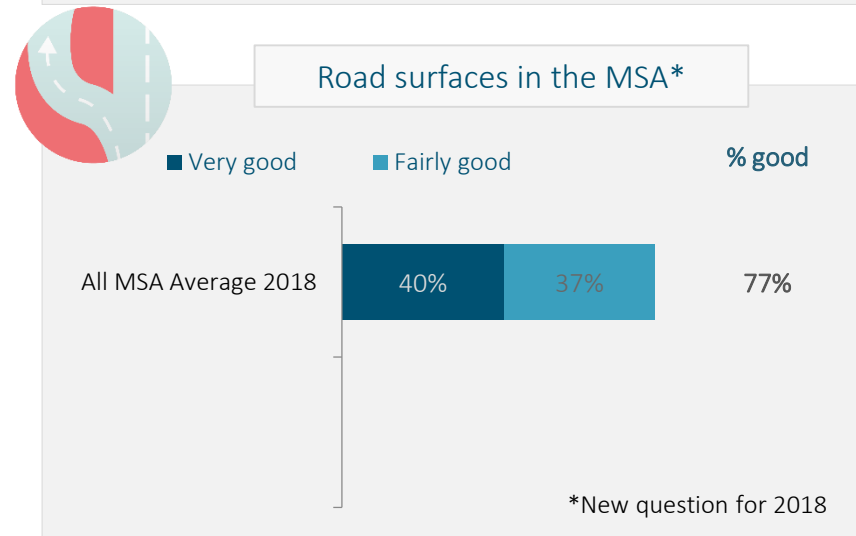
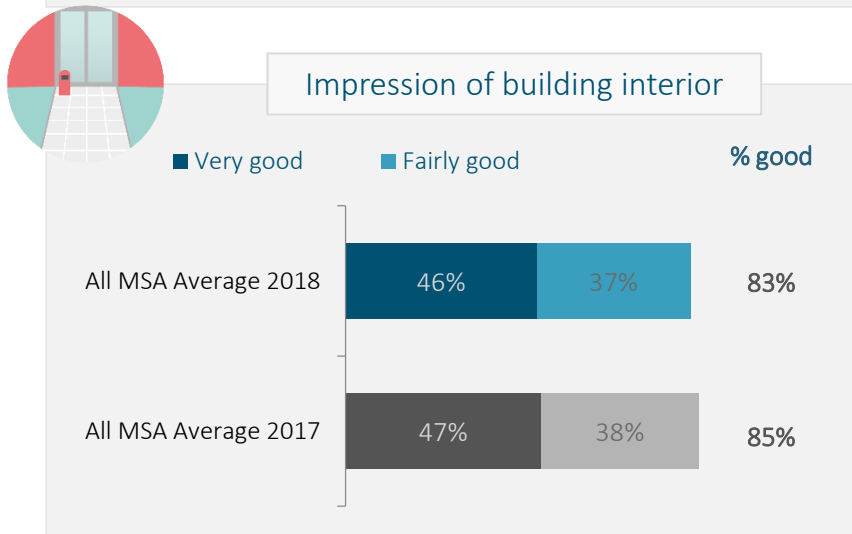
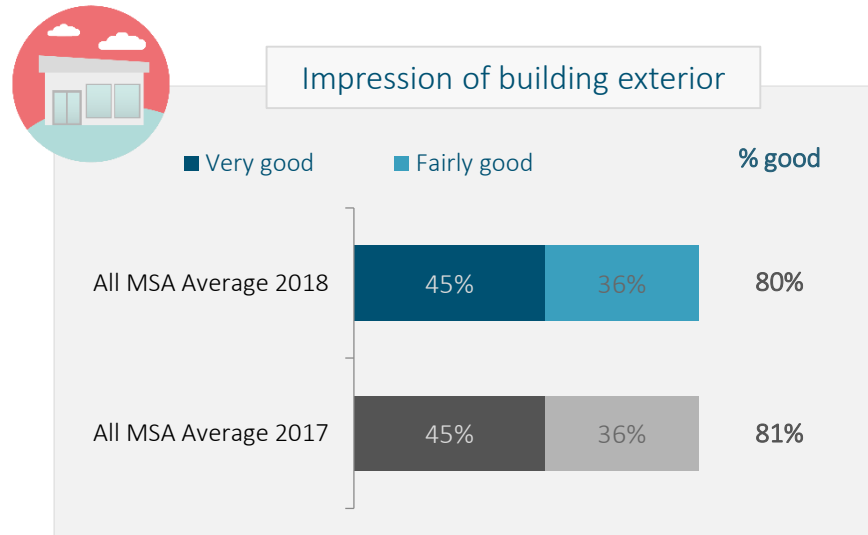
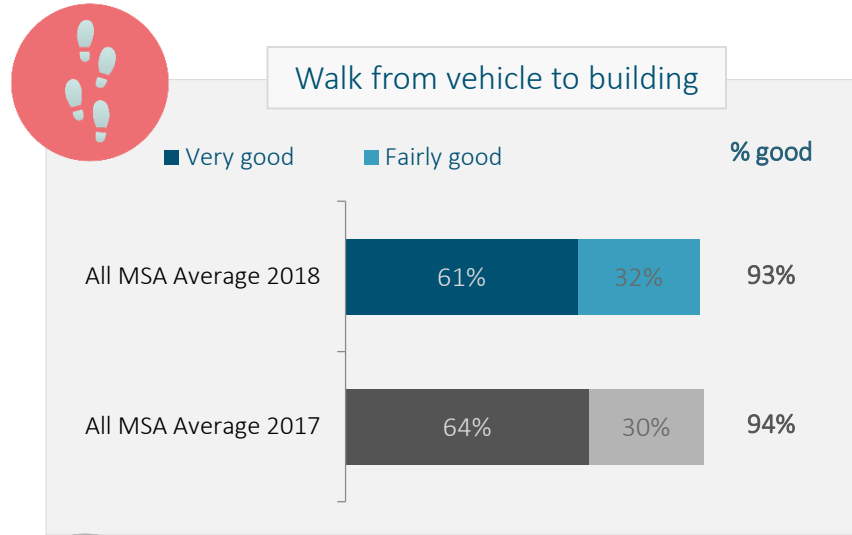
Rating of commonly used aspects (1)

Perceptions of the approach signs, slip roads and car parks and vehicle safety are generally in line with 2017 scores



Rating of commonly used aspects (2)

Perceptions of the building interior and exterior are also similar to last year. Road surfaces are perceived less positively than other aspects of the MSA, with only three quarters rating them as 'good'



Aspects of the MSA used

Visitors are using MSAs to fulfil the same core needs as last year, with toilets and food and drink to have in the MSA coming out on top

All MSA visitors

2018 2017



Leisure



Business



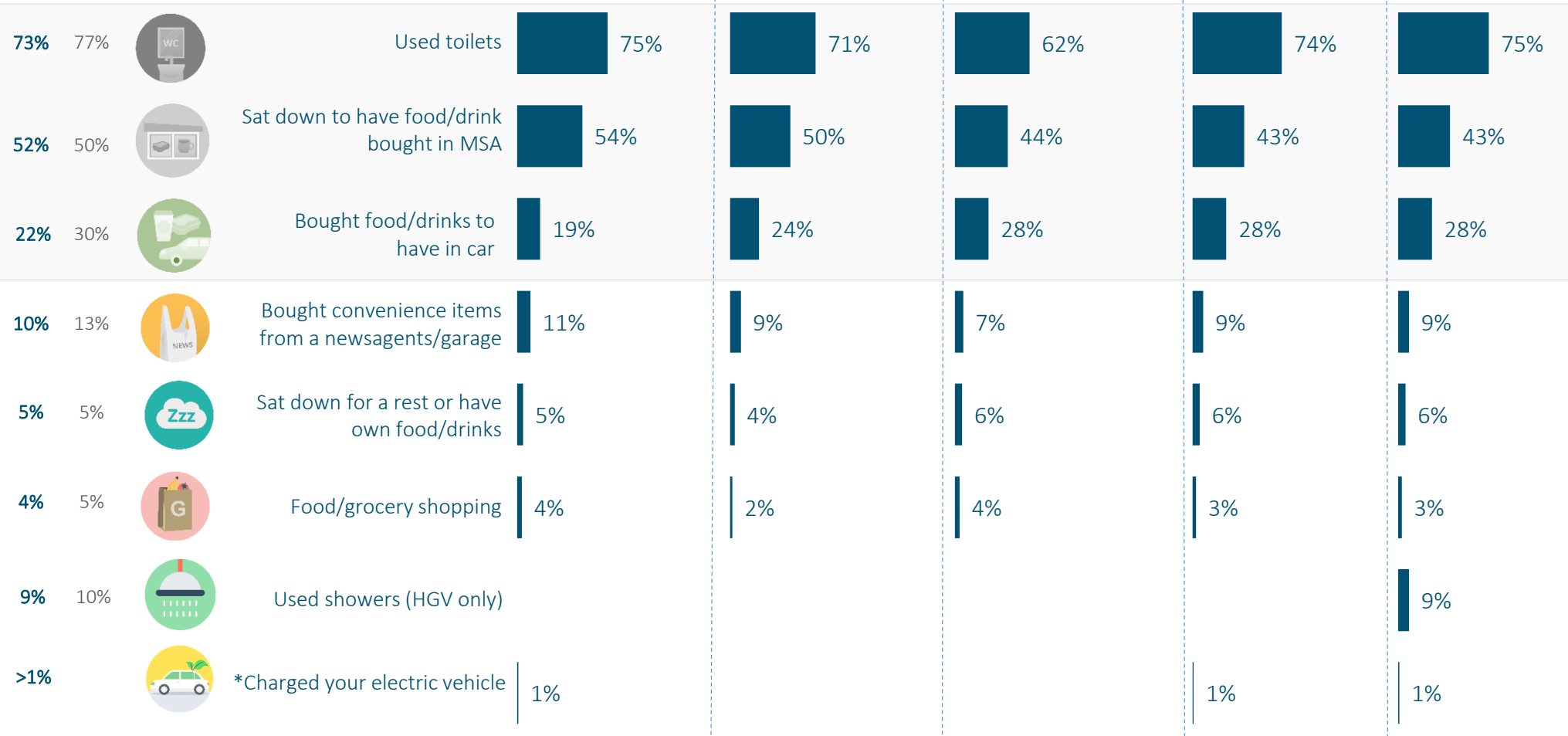
Commuter



Professional



HGV



Where bought food [to eat/drink in MSA]

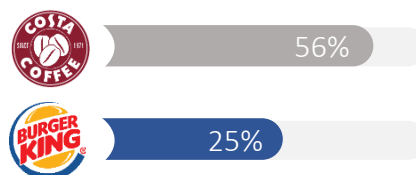
Burger King, Costa Coffee, Greggs and McDonald's are frequently mentioned top brands for food and drink bought to have in the MSA, with the exception of Westmorland Farm shop

Top 2 brands mentioned

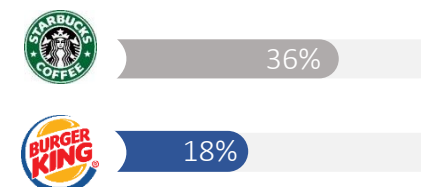
Euro Garages*



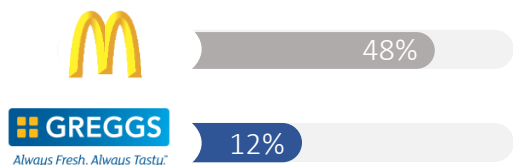
Moto



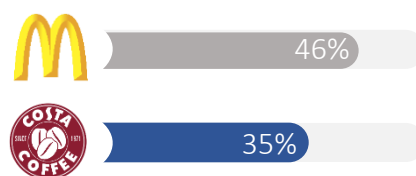
Welcome Break



Extra



Roadchef



Westmorland



Where bought food [to eat/drink in car]

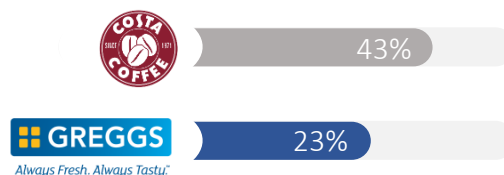
Greggs and Costa Coffee is the lead mentioned brand for food and drink bought to have in the car. Starbucks, Greggs and McDonald's also are frequently mentioned as top brands for food/drinks to have on-the-go

Top 2 brands mentioned

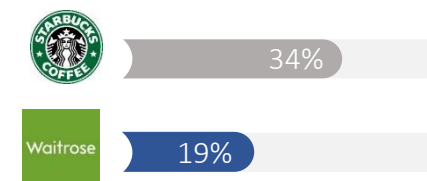
Euro Garages*



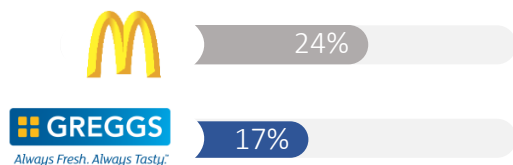
Moto



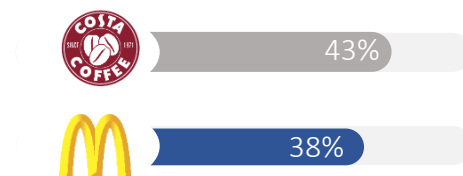
Welcome Break



Extra



Roadchef



(Base to low to show for Westmorland)

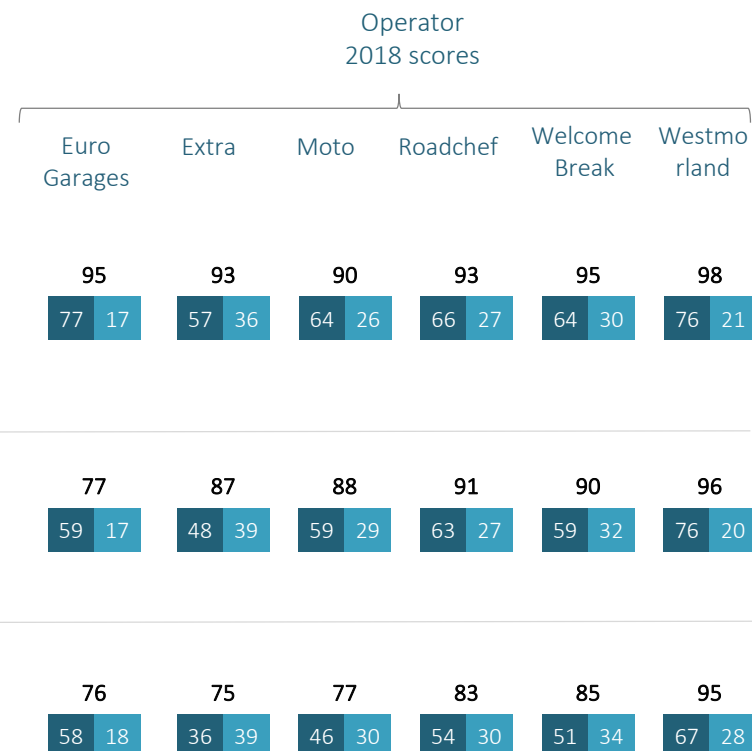
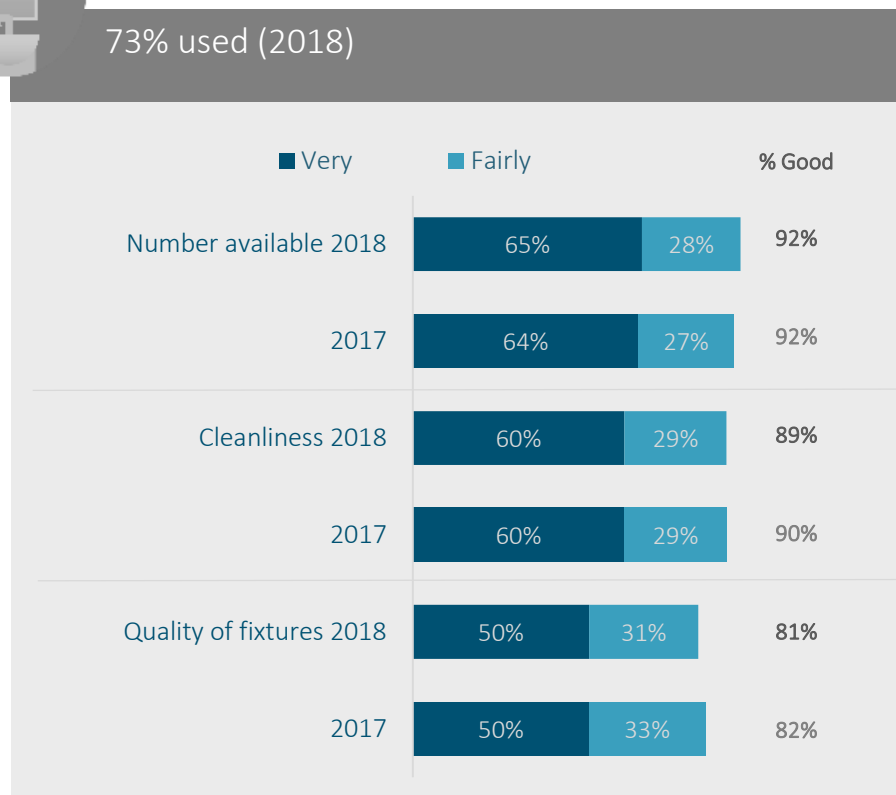
Rating of aspects used [1]

The performance of toilet areas remain consistent vs. 2017, with at least 80% rating each as 'good'. Scores are relatively high across all operators, with only Extra and Moto dropping below 80% for quality of fixtures



Toilets – All MSA

73% used (2018)



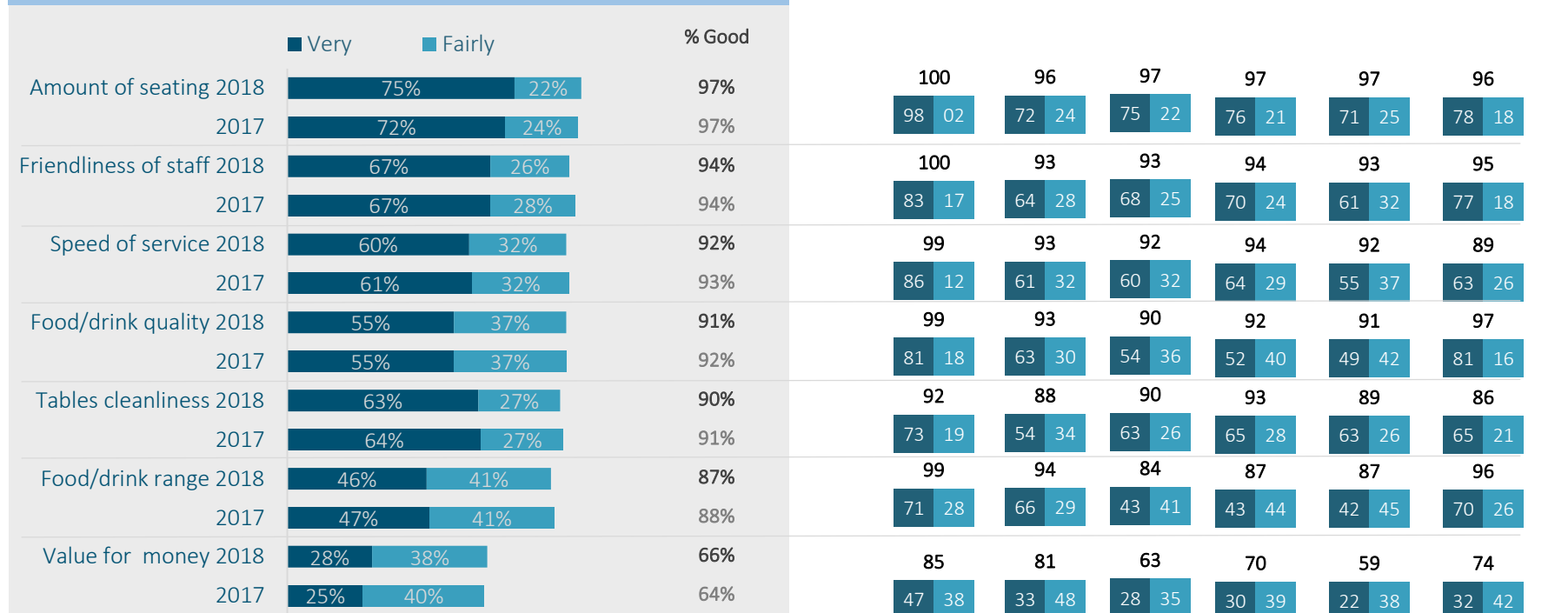
Rating of aspects used [2]

The performance of food and drinks bought to eat in the MSA remain consistently high for 2018. Scores are exceptionally high across all operators particularly for the amount of seating available



Food and drink bought to eat in MSA

Done by 52% (2018)



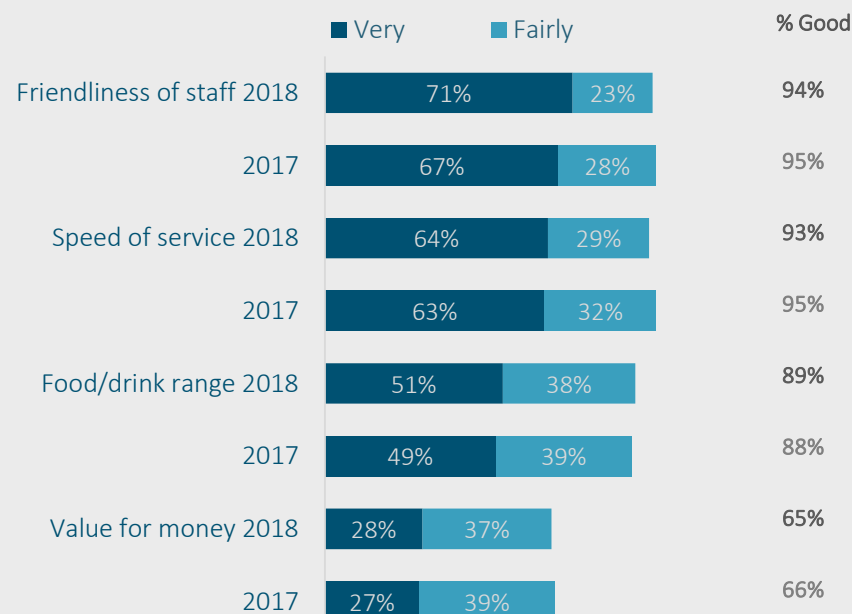
Rating of aspects used [3]

Satisfaction with food and drink bought to have on the go has remained stable compared to last year, whereas satisfaction with places to have own food and drink attributes has decreased marginally



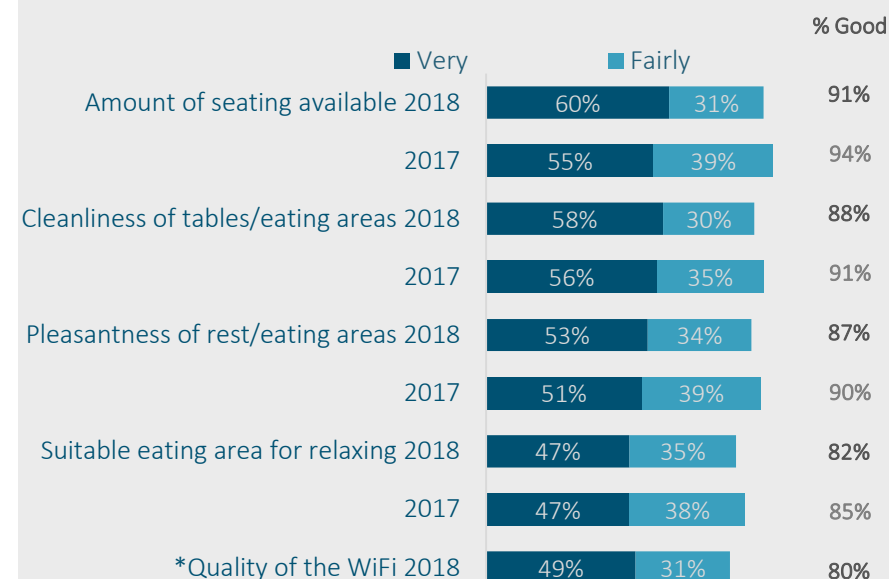
Food and drink bought to have in the car

Done by 22% (2018)



Rest / own food and drink

Done by 5% (2018)



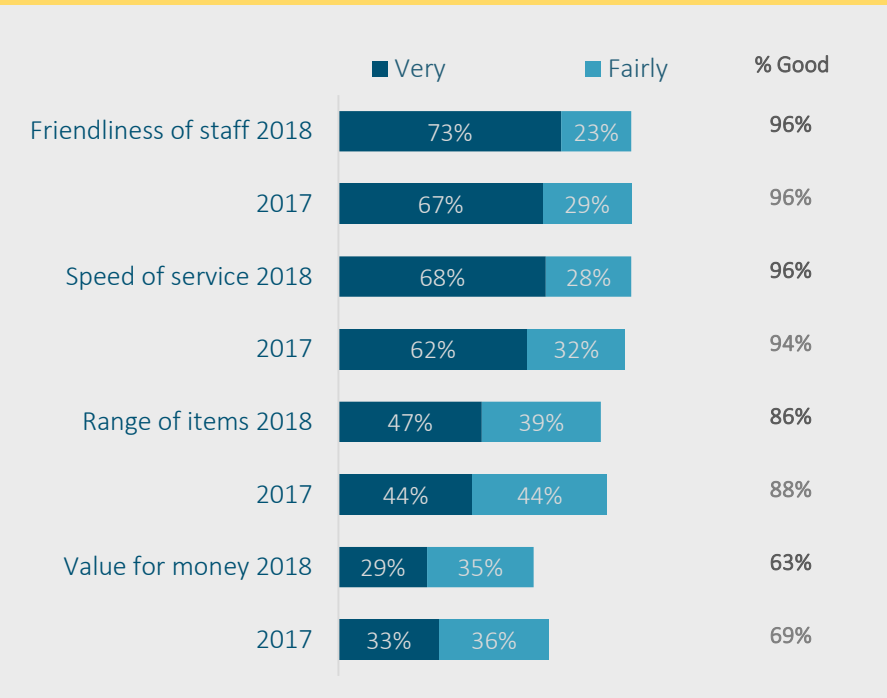
Rating of aspects used [4]

A higher proportion of visitors are rating aspects relating to convenience items as 'very good' this year, with the exception of value for money, which has fallen back overall. Value for money is also down significantly for grocery shopping



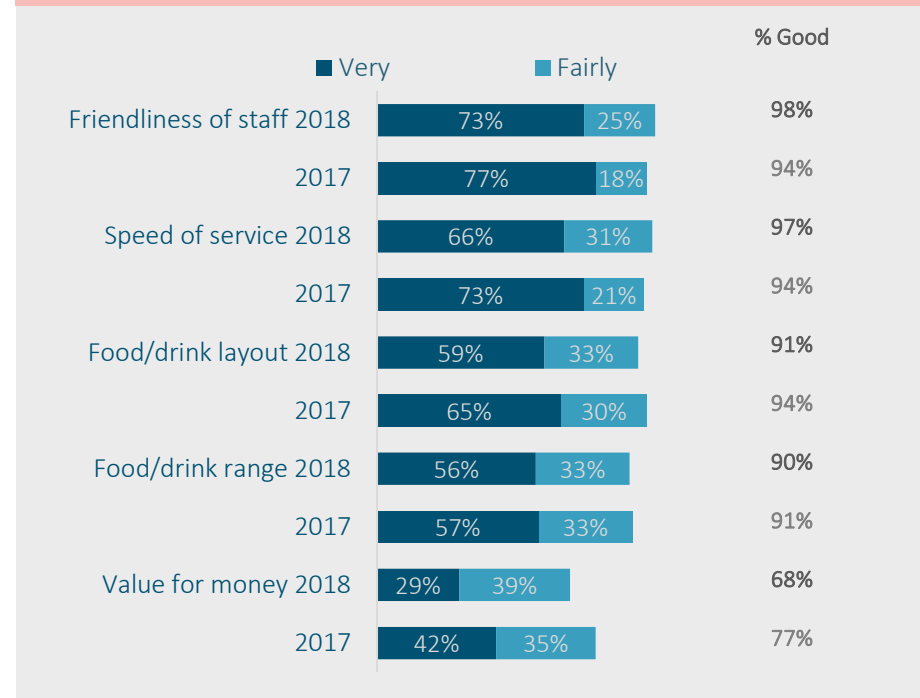
Bought convenience items

Done by 10% (2018)



Grocery shopping bought at MSA

Done by 4% (2018)

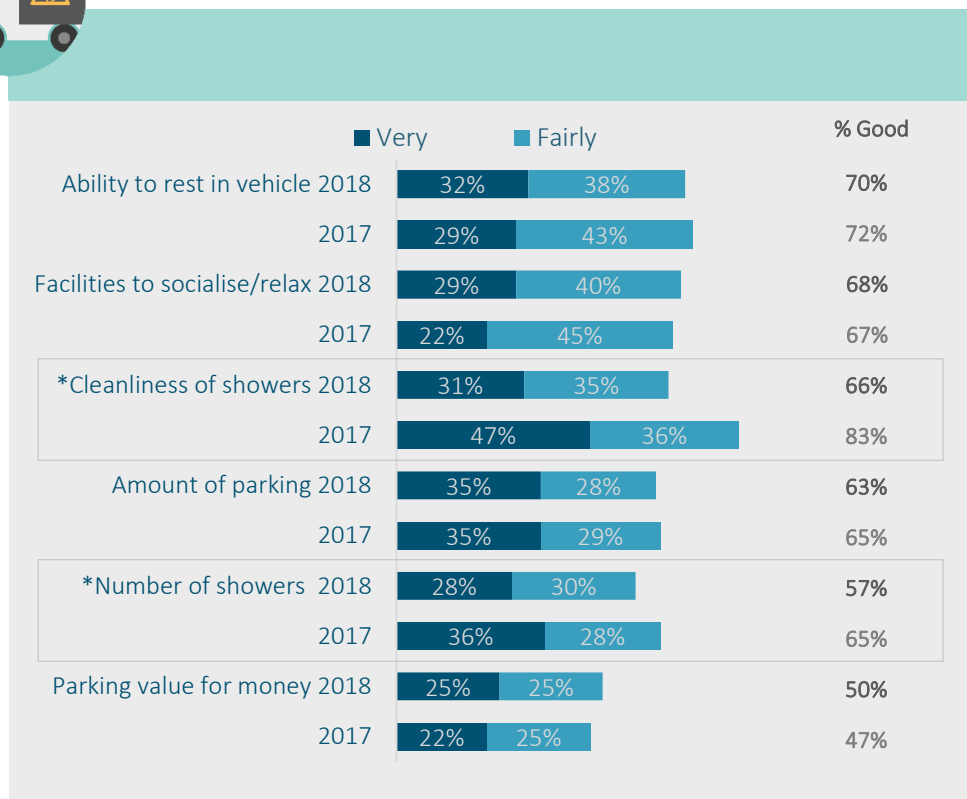


Rating of aspects used [5]

HGV driver satisfaction is consistent for most aspects of the MSA, although down significantly for the cleanliness and number of showers. Satisfaction with the value for money of parking is up slightly, but remains the lowest performing area



HGV Specific



“Only one shower working here and have to ask for key”
Moto

“Clean the showers a bit more often”
Roadchef

“The showers need a big clean and the drainage needs sorting out”
Extra

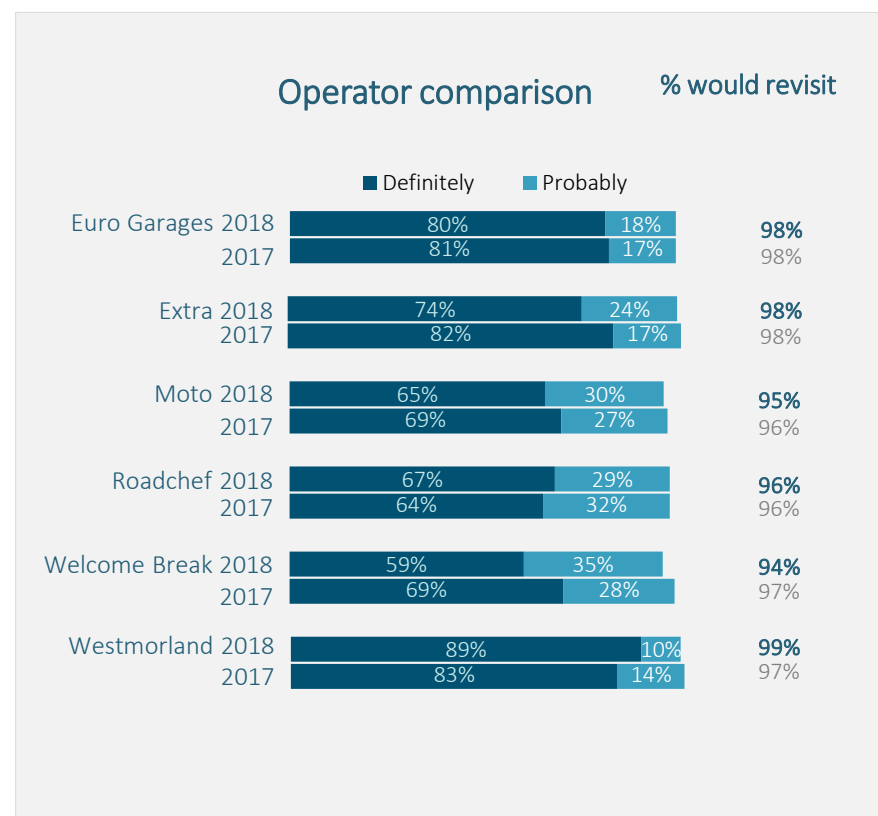
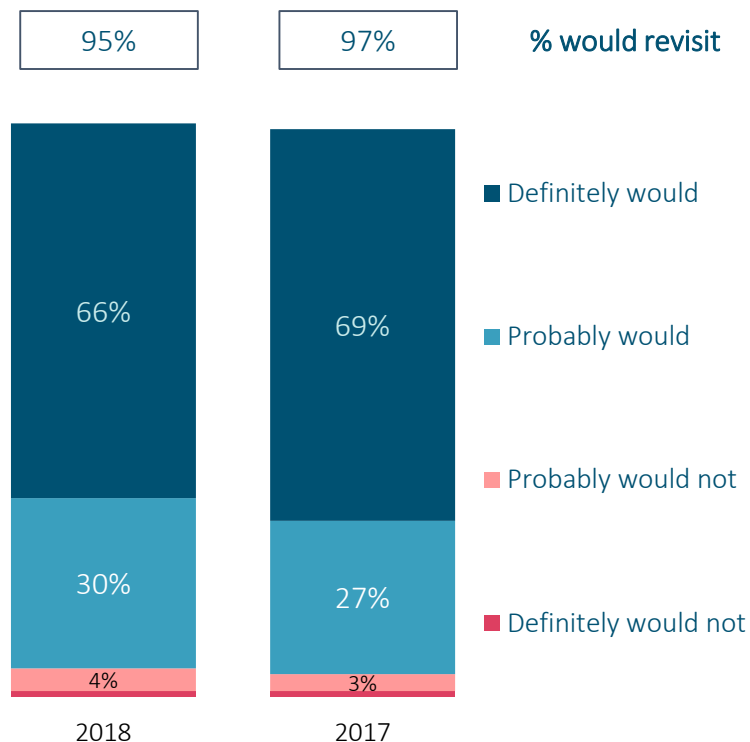
“Won’t stop here for the showers - they are in poor condition and either too hot or cold”
Moto

SECTION 5

Likelihood to revisit and spontaneous MSA
comments

Likelihood to revisit MSA (1)

Almost all visitors remain likely to revisit the MSA at which we spoke to them. The proportion stating that they would 'definitely' revisit is slightly lower for visitors at Welcome Break MSAs

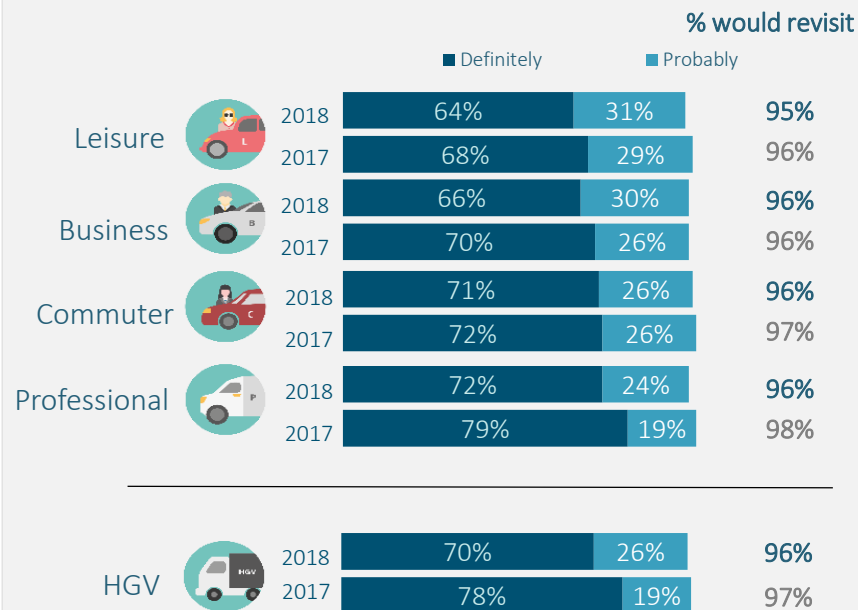


Likelihood to revisit MSA (2)

The proportion stating that they would 'definitely' revisit is lower for those who decided to visit on route as opposed to those who pre-planned to stop and for first timers at the MSA

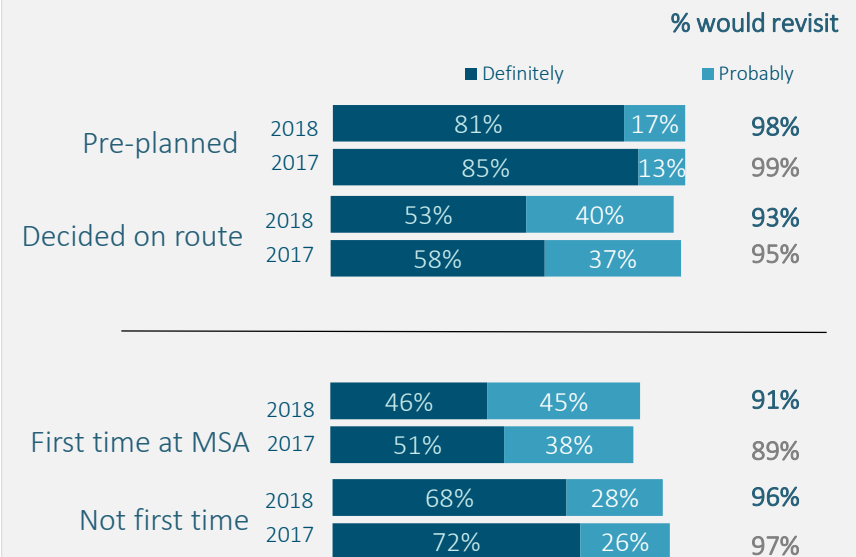
Likelihood to revisit this MSA

by visitor type



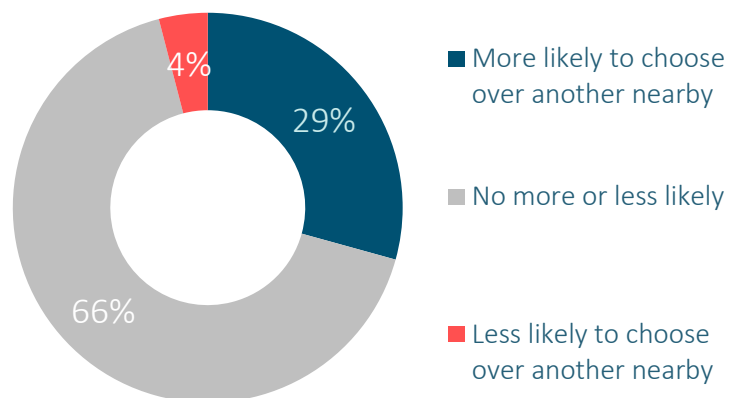
Likelihood to revisit this MSA

by planned to stop and first time at MSA

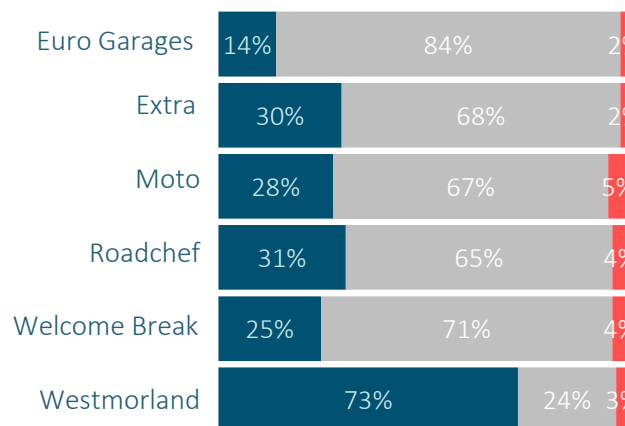


Impact on choosing a particular MSA again

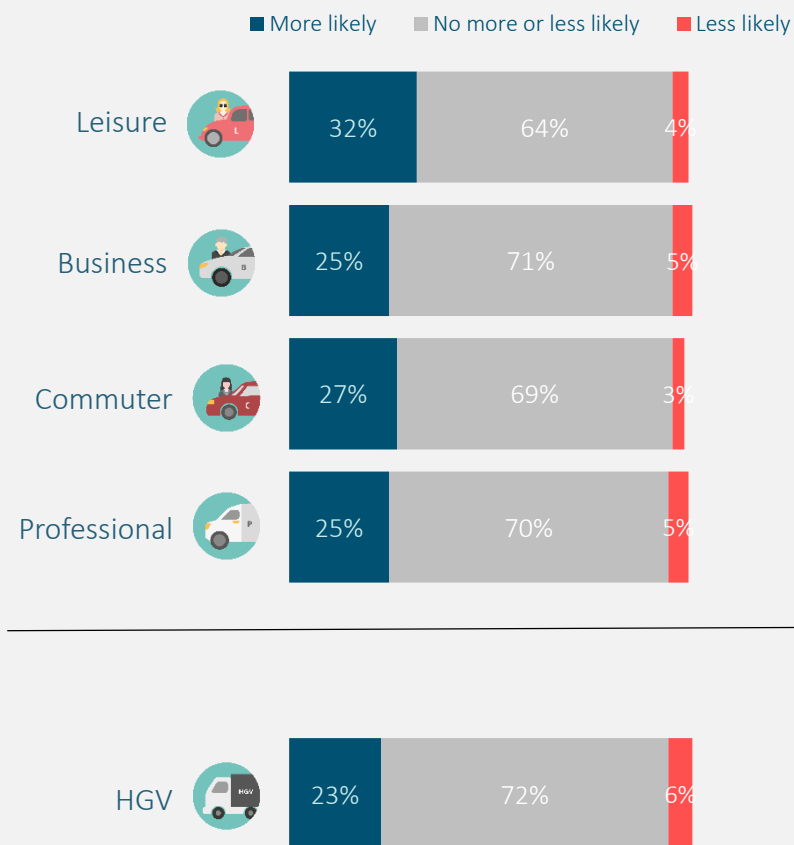
Three in ten say they would be more likely to choose the MSA at which we spoke to them again over one nearby. This was highest amongst leisure passengers. Of the remainder, almost all say it has made them no more or less likely to revisit that MSA.



Operator comparison



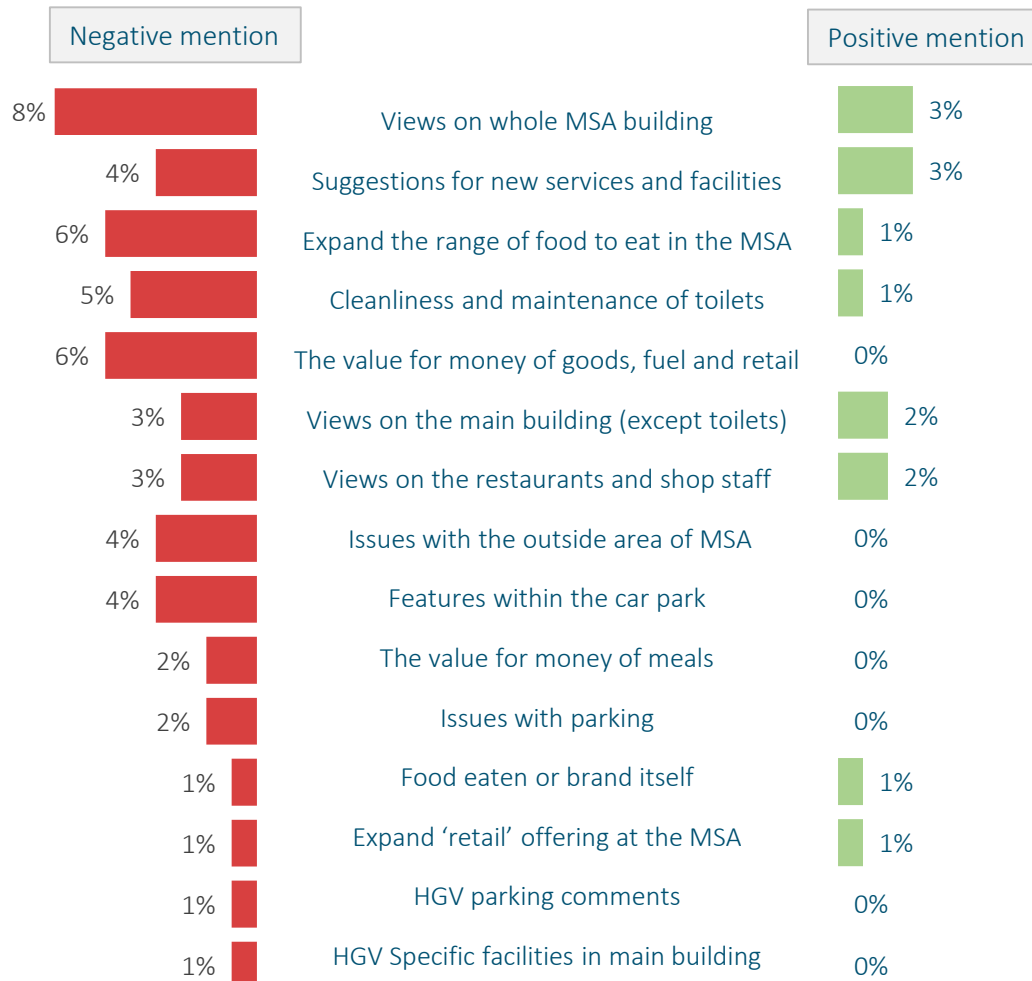
Impact on choosing these Services by visitor type



Comments around the MSA

When prompted spontaneously to comment on the MSA, 42% said there was nothing that needed improving. Otherwise, comments centred on the physical building, the range of their facilities, the 'food to eat in' range and the cleanliness of the toilets

42% said there was nothing in particular that needed improving and it's OK as it is. Of the remaining 58%, the most common suggestions are listed below...



"The services could do with a **refit as it's very tired looking now**, especially the toilets. If it's left much longer I'd probably bypass it"
Business, Moto

"The service area as a whole is **looking tired and could do with a refurbishment**"
Leisure, Roadchef

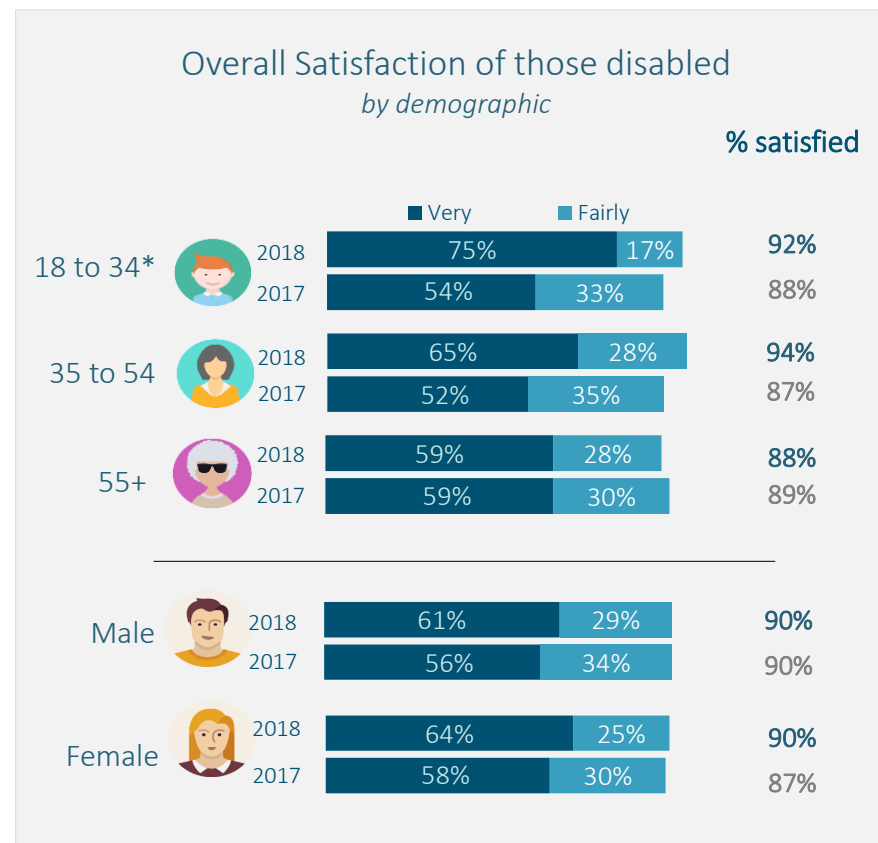
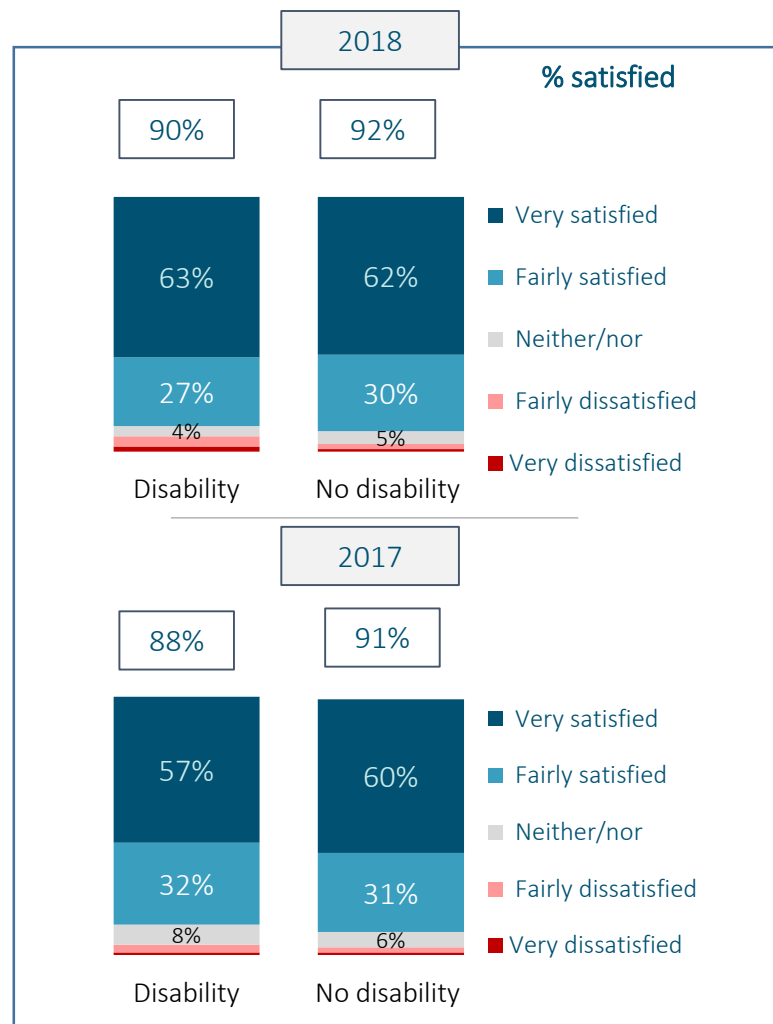
"I would like a **better range of foods for allergy sufferers** (i.e. dairy free, gluten free etc.)"
Leisure, Roadchef

"**Service could be faster** in the takeaway area and there should be **cleaner toilets**"
Leisure, Westmorland

"**Toilets were unclean and poorly maintained**. I couldn't access the disabled toilet very easily"
Leisure, Euro Garages

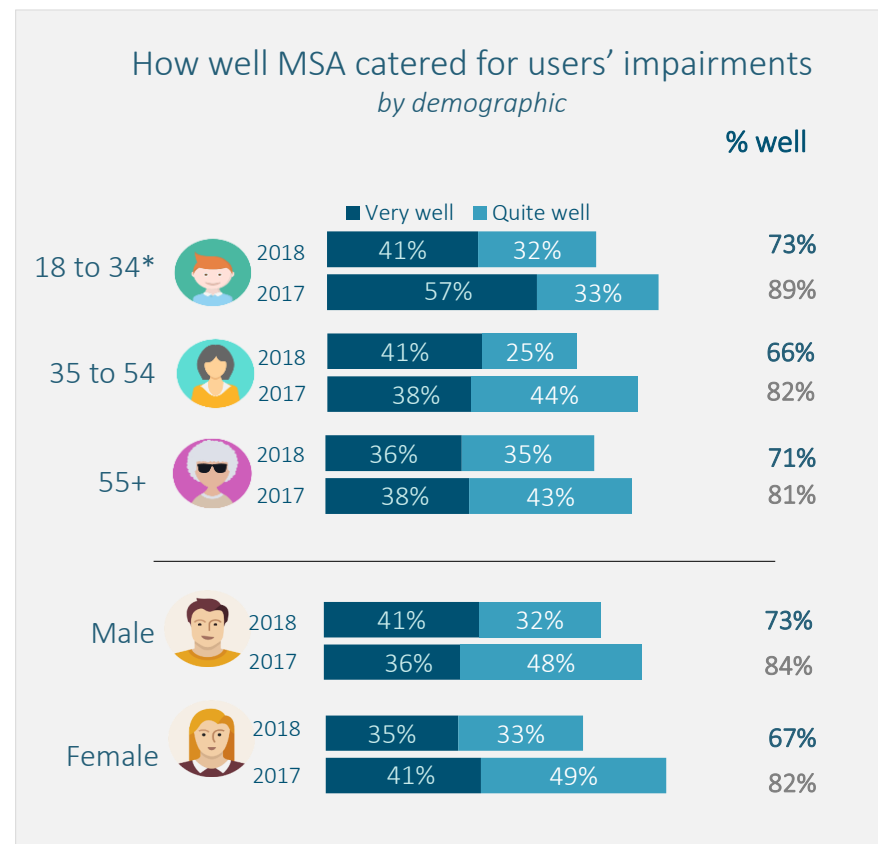
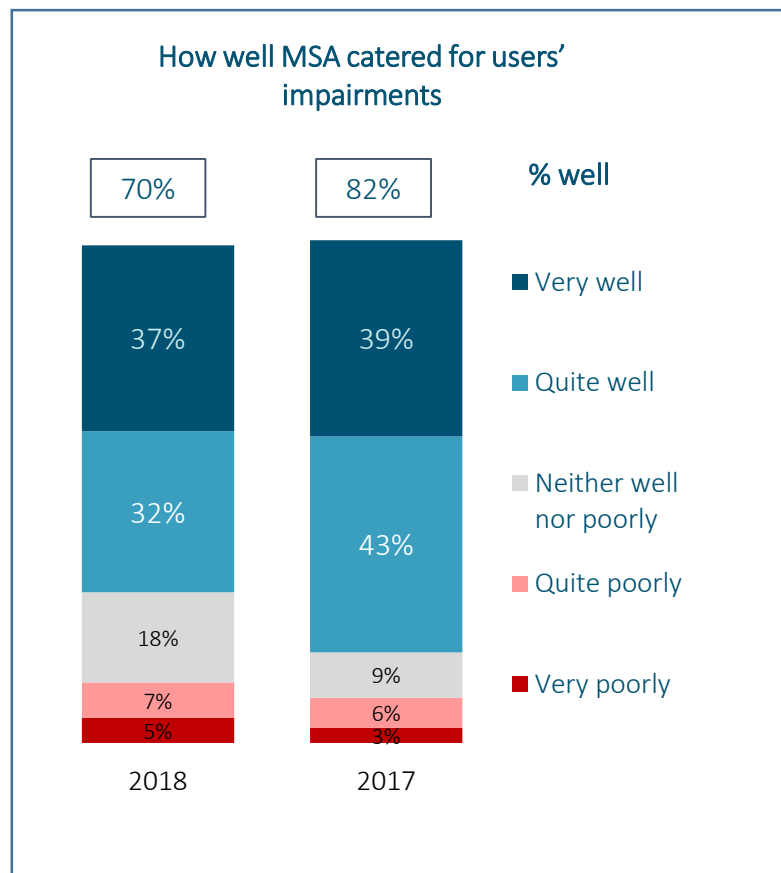
Visitors who are disabled (1)

They were as satisfied with their overall experience at the MSA as other visitors and equally likely to return. Very satisfied scores have improved for disabled visitors between the ages of 18-54



Visitors who are disabled (2)

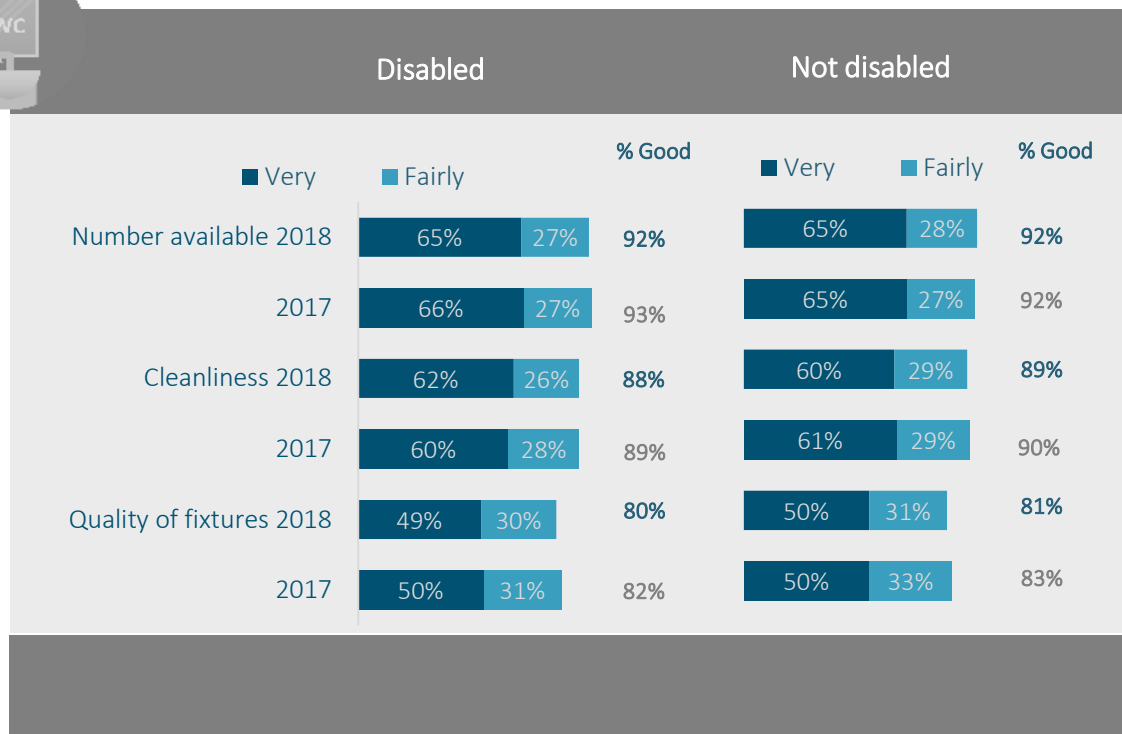
Seven in ten say the MSA catered well for their impairments, down from eight in ten last year. Females and those aged 35-54 are less likely to say the MSA catered well for their impairments



Visitors who are disabled (3)

They rate aspects of the toilet very similarly to those not disabled. However, a number of spontaneous comments mention a need for more disabled toilets

Toilets – All MSA



“They need **more disabled toilets**”

Leisure, Roadchef

“It would be good to have a changing places for disabled people and **more disabled toilets**”

Leisure, Westmorland

“Disabled **lighting in the toilets** needs **brightening**”

Leisure, Welcome Break

“**Toilet too far from main entrance**, especially for a disabled person”

Business, Moto

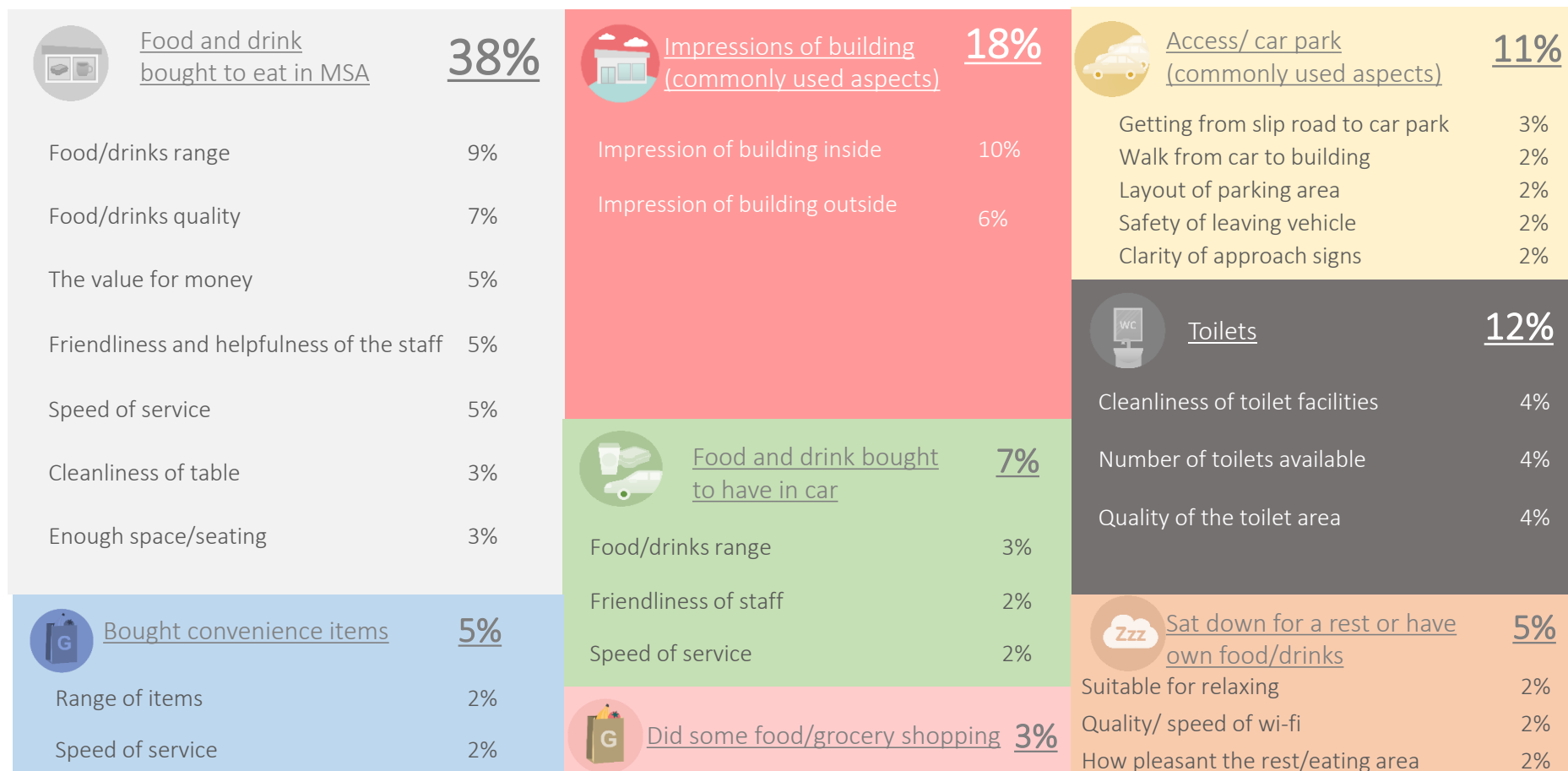
“Not enough disabled parking and more disabled toilets needed ”

Leisure, Moto

Factors influencing satisfaction with MSAs [all drivers excluding HGV]

Attributes related to food and drink bought to eat in the MSA, impressions of the building inside and outside and toilet facilities are key factors influencing satisfaction for MSAs amongst non-HGV drivers

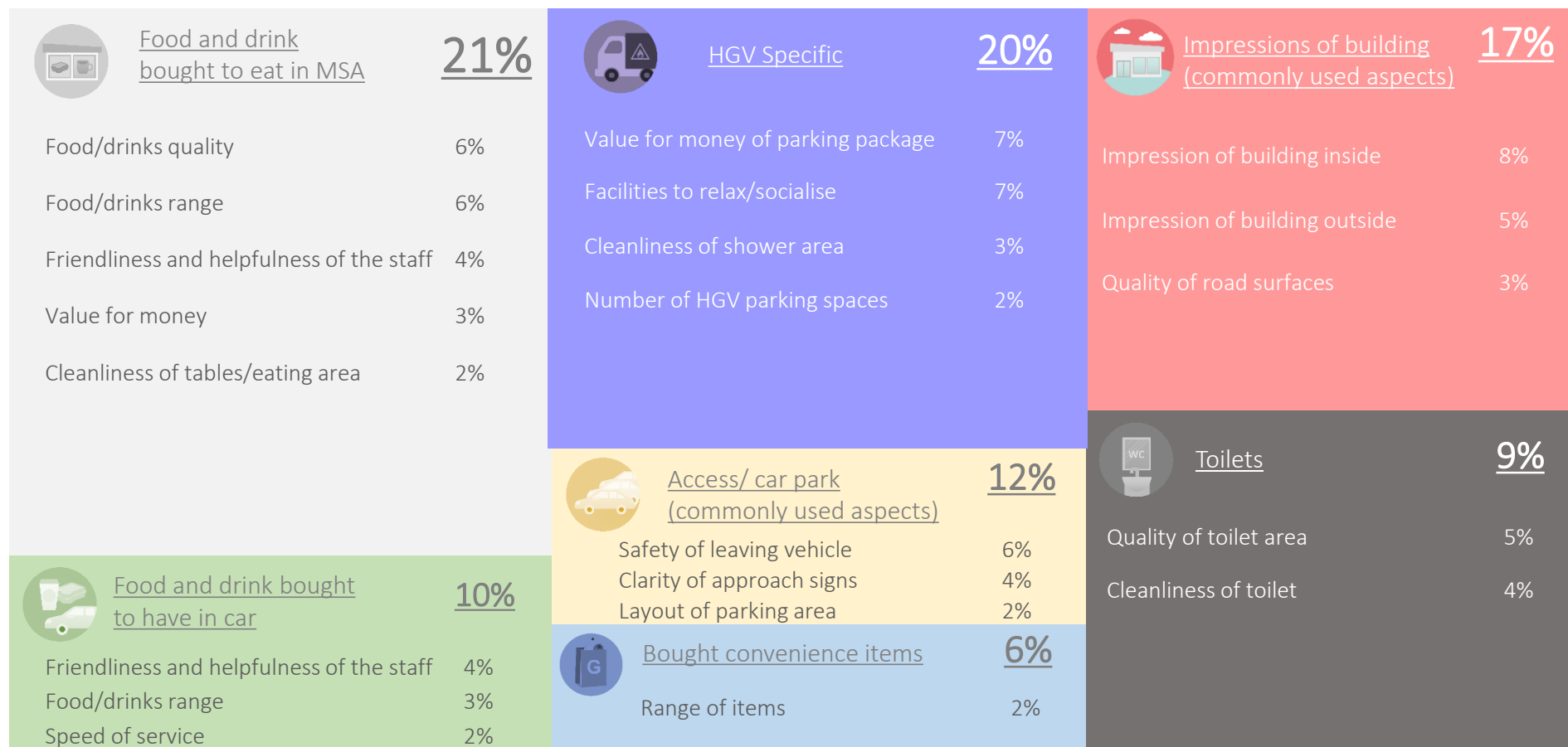
% share of impact on overall MSA satisfaction



Factors influencing satisfaction with MSAs [all HGV drivers]

Food and drink bought to eat in the MSA and HGV specific factors are key influencers of satisfaction for HGV drivers. Value for money of parking package and facilities to relax/ socialise are of particular importance

% share of impact on overall MSA satisfaction



Prioritising improvement (ratings vs. importance)

All drivers (excl HGV)

PRIORITISE

Relatively higher importance, lower rating

1. Your overall impression of the building as you walked up to it
2. Your overall impression of the building immediately you went inside it
3. Value for money



MAINTAIN

Relatively higher importance, higher rating

1. Amount of seating available
2. The friendliness and helpfulness of the staff
3. The number of toilets available



All HGV drivers

PRIORITISE

Relatively higher importance, lower rating

1. Value for money of parking package
2. Facilities here for relaxing/socializing
3. Range of food/drink



MAINTAIN

Relatively higher importance, higher rating

1. How safe & secure it felt leaving the vehicle
2. The quality of food/drink available
3. The quality of the fixtures/fittings décor in the toilets



Food and drink
bought to eat
in MSA



Quality of
facilities



HGV
Specific



Toilets



Access/car
park



Bought food
and drink to
have in car



SECTION 6

Overall summary

Overall summary [I]

92% of visitors are satisfied with their MSA experience; marginally higher than 2017 (90%)

- The levels of 'very satisfied' have improved slightly across all visitor groups this year
- Just under one third claim to be more likely to choose a specific MSA again over another nearby, as a result of their experience

Over half of MSA visitors find stopping at MSAs in general enjoyable, very few do not find it enjoyable,

- Most agree some MSAs are definitely better than others, but only around a quarter were fussed which MSA they visit.
- Visitors clearly felt introducing well-known brands has made MSAs better
- Over half the visitors find it annoying fuel costs more at MSAs than elsewhere

The experience of visiting an MSA continues to have a clear positive impact on mood between arrival and exit

- The reduction of negative emotion and the increase in positive emotion on leaving MSAs is larger in 2018 in comparison to 2017
- Improvements in mood remain consistent across all visitor types

Overall summary [II]

A third of visitors were more inclined to stop at a particular MSA because of the brands on offer

- Extra scores highest at 41%
- Across all brands, Costa, Starbucks, McDonald's and M&S were the most influential
- Two thirds of Moto visitors knew the MSA was run by Moto, more than for any other operator

Consistent with 2017, MSAs are primarily visited for the toilet facilities and for food and drink to eat in

- MSAs have maintained high ratings for toilets and food and drink to eat in. However toilets were still often a suggestion for improvement when felt they were not up to scratch
- Attributes relating to access and the building itself are also rated highly, although road surfaces are less so. Again improvement suggestions relate to refurbishing buildings and more facilities being available at MSAs
- There were comments about expanding food ranges – healthy options and vegan meals were frequent mentions in this area
- Value for money ratings are the same as last year with around two thirds of visitors rating value for money as good.

Satisfaction is slightly lower for visitors who drive for a living, although still high (88%) and improved on last year (84%)

- However HGV drivers still rate the value for money of parking packages, facilities to relax/socialise, and rest in their vehicles lower
- These were key drivers of their satisfaction and there were a number of comments about inadequate showering facilities

SECTION 7

Appendix

List of MSAs

We conducted interviews at the following 111 Motorway Service Areas in England*:

Motorway Service Station	Operator	2018 Interviews	Road
Baldock	Extra	81	A1 (M)
Beaconsfield	Extra	80	M40
Birch EB	Moto	89	M62
Birch WB	Moto	89	M62
Birchanger Green	Welcome Break	83	M11
Blackburn with Darwen	Extra	81	M65
Blyth	Moto	84	A1 (M)
Bridgwater	Moto	94	M5
Burton-in-Kendal	Moto	78	M6
Burtonwood	Welcome Break	85	M62
Charnock Richard NB	Welcome Break	91	M6
Charnock Richard SB	Welcome Break	87	M6
Cherwell Valley	Moto	80	M40
Chester	Roadchef	93	M56
Chieveley	Moto	95	M4
Clacket Lane EB	Roadchef	92	M25
Clacket Lane WB	Roadchef	90	M25
Cobham	Extra	86	M25
Corley NB	Welcome Break	86	M6
Corley SB	Welcome Break	90	M6
Cullompton	Extra	84	M5
Doncaster North	Moto	89	M18
Donington Park	Moto	78	M1

Motorway Service Station	Operator	2018 Interviews	Road
Durham	Roadchef	80	A1 (M)
Exeter	Moto	93	M5
Ferrybridge	Moto	83	M62
Fleet NB	Welcome Break	91	M3
Fleet SB	Welcome Break	101	M3
Frankley NB	Moto	91	M20
			M5
Frankley SB	Moto	90	M5
Gloucester NB	Westmorland	93	M5
Gloucester SB	Westmorland	90	M5
Gordano	Welcome Break	93	M5
Hartshead Moor EB	Welcome Break	76	M62
Hartshead Moor WB	Welcome Break	76	M62
Heston EB	Moto	102	M4
Heston WB	Moto	79	M4
Hilton Park NB	Moto	85	M6
Hilton Park SB	Moto	82	M6
Hopwood Park	Welcome Break	79	M42
Keele NB	Welcome Break	90	M6
Keele SB	Welcome Break	81	M6
Killington Lake	Roadchef	83	M6
Knutsford NB	Moto	85	M6
Knutsford SB	Moto	91	M6

*Folkestone Services chose not to participate in this year's survey

List of MSAs

We conducted interviews at the following 111 Motorway Service Areas in England*:

Motorway Service Station	Operator	2018 Interviews	Road
Lancaster NB	Moto	81	M6
Lancaster SB	Moto	87	M6
Leicester Forest East NB	Welcome Break	72	M1
Leicester Forest East SB	Welcome Break	82	M1
Leigh Delamere EB	Moto	93	M4
Leigh Delamere WB	Moto	91	M4
London Gateway	Welcome Break	80	M1
Maidstone	Roadchef	92	M20
Medway EB	Moto	100	M2
Medway WB	Moto	70	M2
Membury EB	Welcome Break	86	M4
Membury WB	Welcome Break	79	M4
Michaelwood NB	Welcome Break	85	M5
Michaelwood SB	Welcome Break	90	M5
Newport Pagnell NB	Welcome Break	89	M1
Newport Pagnell SB	Welcome Break	84	M1
Northampton NB	Roadchef	90	M1
Northampton SB	Roadchef	90	M1
Norton Canes	Roadchef	83	M6 TOLL
Oxford	Welcome Break	92	M40
Pease Pottage	Moto	80	M23
Peterborough	Extra	104	A1 (M)
Reading EB	Moto	92	M4

Motorway Service Station	Operator	2018 Interviews	Road
Reading WB	Moto	90	M4
Rivington NB	EuroGarages	86	M61
Rivington SB	EuroGarages	90	M61
Rownhams NB	Roadchef	84	M27
Rownhams SB	Roadchef	82	M27
Sandbach NB	Roadchef	91	M6
Sandbach SB	Roadchef	77	M6
Sedgemoor NB	Welcome Break	96	M5
Sedgemoor SB	Roadchef	98	M5
Severn View	Moto	93	M48
South Mimms	Welcome Break	79	M25
Southwaite NB	Moto	87	M6
Southwaite SB	Moto	81	M6
Stafford NB	Moto	87	M6
Stafford SB	Roadchef	90	M6
Strensham NB	Roadchef	92	M5
Strensham SB	Roadchef	90	M5
Tamworth	Moto	91	M42
Taunton Deane NB	Roadchef	93	M5
Taunton Deane SB	Roadchef	85	M5
Tebay NB	Westmorland	90	M6
Tebay SB	Westmorland	87	M6

*Folkestone Services chose not to participate in this year's survey

List of MSAs

We conducted interviews at the following 111 Motorway Service Areas in England*:

Motorway Service Station	Operator	2018 Interviews	Road
Telford	Welcome Break	90	M54
Thurrock	Moto	85	M25
Tibshelf NB	Roadchef	85	M1
Tibshelf SB	Roadchef	82	M1
Toddington NB	Moto	87	M1
Toddington SB	Moto	94	M1
Trowell NB	Moto	87	M1
Trowell SB	Moto	85	M1
Warwick NB	Welcome Break	92	M40
Warwick SB	Welcome Break	87	M40
Washington NB	Moto	86	A1 (M)
Washington SB	Moto	82	A1 (M)
Watford Gap NB	Roadchef	85	M1
Watford Gap SB	Roadchef	79	M1
Wetherby	Moto	90	A1 (M)
Winchester NB	Moto	74	M3
Winchester SB	Moto	77	M3
Woodall NB	Welcome Break	83	M1
Woodall SB	Welcome Break	92	M1
Woolley Edge NB	Moto	88	M1
Woolley Edge SB	Moto	86	M1

*Folkestone Services chose not to participate in this year's survey