

'A' Road Services - what users of the A3 and A34 think

Report for Transport Focus by BDRC

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Background, objectives and methodology

Background and research objectives

Background

Transport Focus, having developed the Motorway Services User Survey (MSUS) ¹, wanted to conduct an in-depth investigation of provision and **user experience** of services on 'A' roads. The research was also to act as a pilot study using a variety of research methodologies to understand the best way to approach any further research.

The **pilot research** concentrated on one Highways England operational area in Surrey, Hampshire, Oxfordshire and Berkshire, covering the **A3 and A34**.

Objectives



Fully **audit** the service provision along the A3 and A34



Deliver a **qualitative exploration** of the services along both roads amongst service users and non-users, focussing on suitability of the service provision, signage to the services and information about the services



Provide a **quantitative measure** of user satisfaction with each service location along both roads

¹ Motorway Services User Survey – Spring 2017: <https://www.transportfocus.org.uk/research-publications/publications/motorway-services-user-survey-spring-2017/>

Methodology overview

Further detail is available in the appendix



1. Audit of services

- Conducted in three outings on the **6th, 8th and 9th February** 2018
- Included any facilities that were either **signed or visible from the A3/A34**
- To establish:
 - The number of services on each road
 - Exact location
 - The facilities at each
- To help inform the later stages of the research and collect images for the qualitative interviewing
- The full audit questionnaire is shown in the appendix



2. Qualitative focus groups and depth interviews

- Conducted between **19th February and 9th March** 2018
- **4 focus groups** amongst users of the A3 and A34 (2 groups for each road containing 6 respondents each)
- **34 depth interviews** (24 via phone, 10 face-to-face)
 - 22 users of services on the A3 or A34
 - 12 non-users of services
- Covered a range of different types of users/non-users making different types of journey:
 - Commuting, travelling for work, leisure journeys
 - HGV drivers
 - Motorcyclists



3. Quantitative face-to-face interviewing

- Conducted between **21st March and 10th April** 2018
- Covered **12 locations** on the A3/A34
- **1210 interviews**
- 10 minute questionnaire administered by an interviewer on a tablet
- Respondents approached on exit of the services (but before they got into their car)
- 6 hour interview shifts covering a range of times of day and day of week
- (Did not cover Chieveley, which is on the intersection of the A34 and M4, due to it being a motorway services and therefore different in nature to the A34 services)



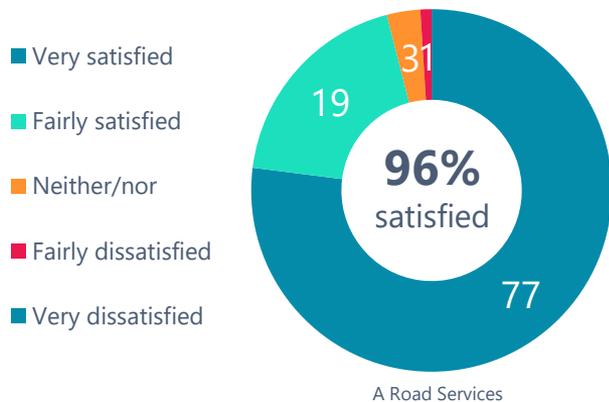
Overall experience and mood

Overall satisfaction

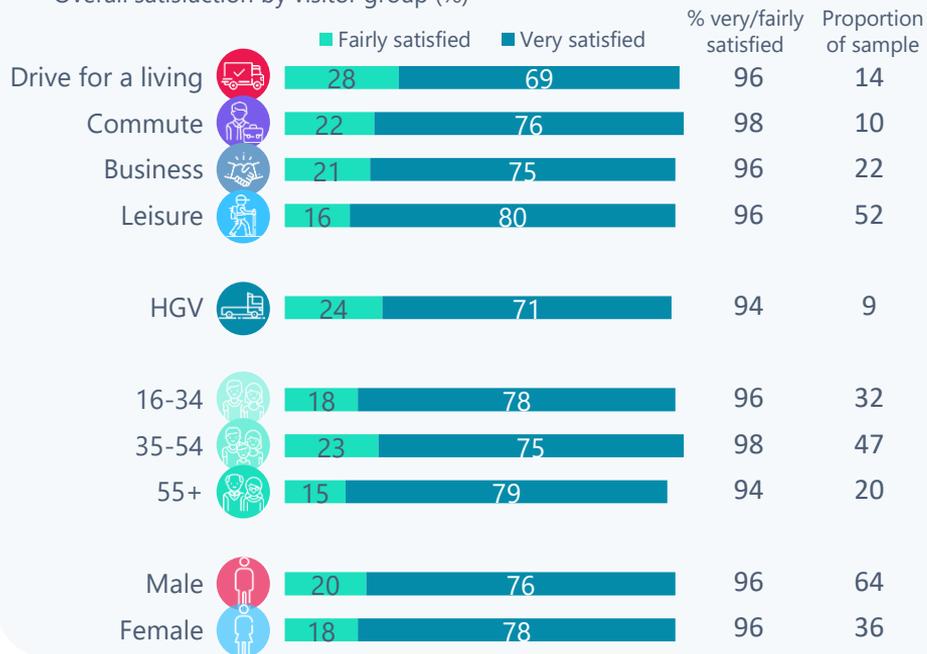
Satisfaction with services on these roads is high, with 96% satisfied.

The proportion of very/fairly satisfied is relatively consistent across visitor groups, with satisfaction lowest amongst HGV drivers and those aged 55+. There is more variation when we look at those who are 'very satisfied': people travelling for leisure are considerably more satisfied, whilst people driving for a living (a group which crosses over with HGV drivers) are the least likely to be very satisfied

Overall satisfaction (%)



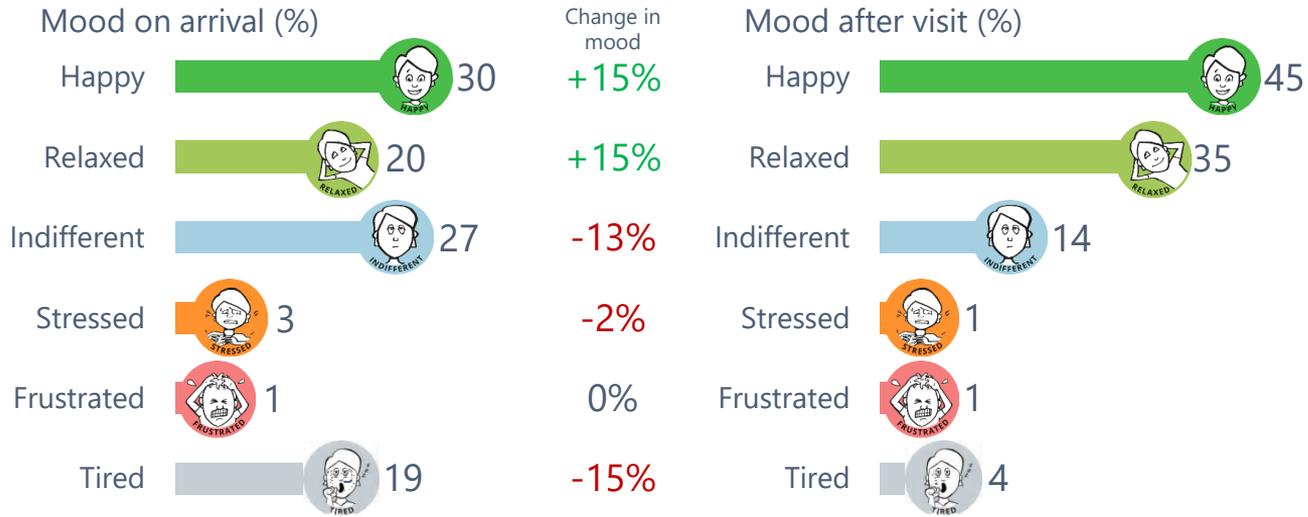
Overall satisfaction by visitor group (%)



Q8. Overall, how satisfied are you with your experience at these services today? Base: all respondents (1210), Drive for a living (169), Commute (127), Business (271), Leisure (632), HGV (106), 16-34 (390), 35-54 (568), 55+ (247), Male (772), Female (437)

Mood on arrival and after visit – overall

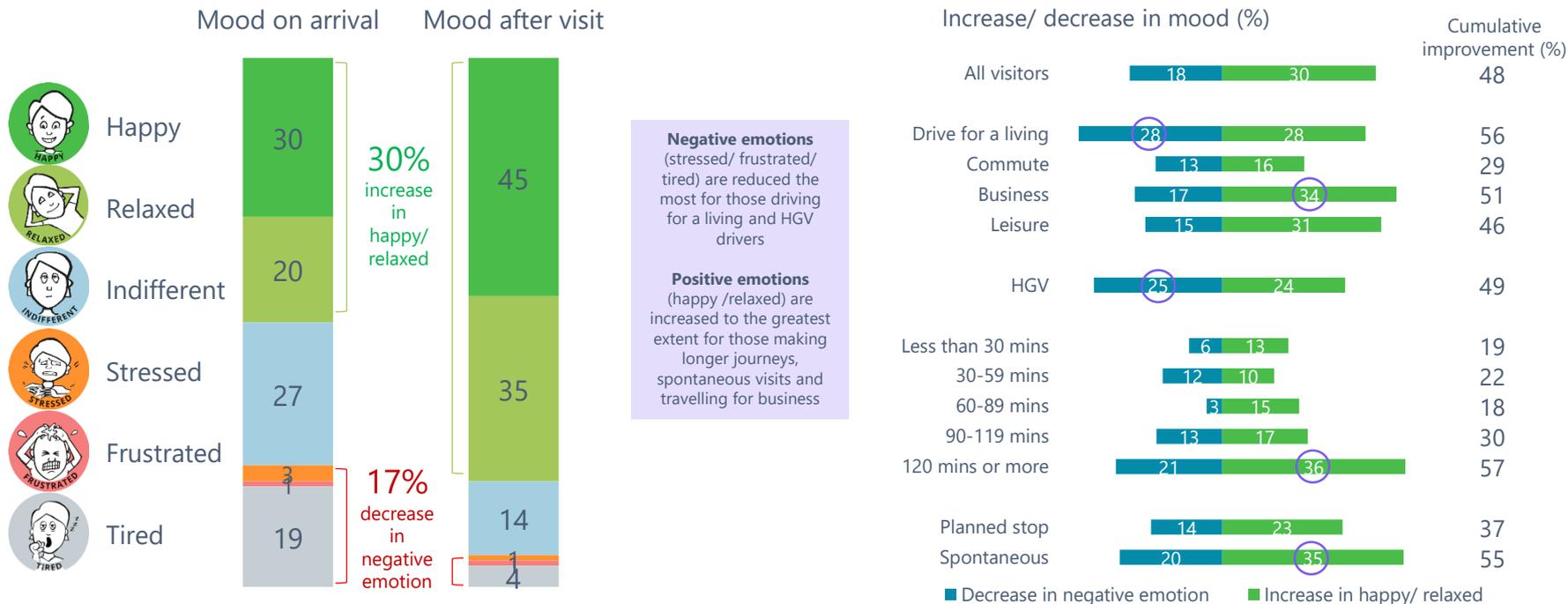
Positive moods (happy and relaxed) increase by 15% after a visit to these 'A' Road Services. This improvement in mood is mostly a result of fewer people feeling tired or indifferent, rather than a reduction in feeling stressed or frustrated.



Q5. Which of these images best describes your mood when you first arrived at these services today? Q17 Which of these images best describes your current mood after your visit? Base: all respondents (1210)

Mood on arrival and after visit – by visitor group

A stop at an 'A' Road services has the greatest impact on the mood of those who drive for a living (56% improvement), those travelling for business (51%), people making journeys that last two hours or more (57%) and making a spontaneous stop (55%)

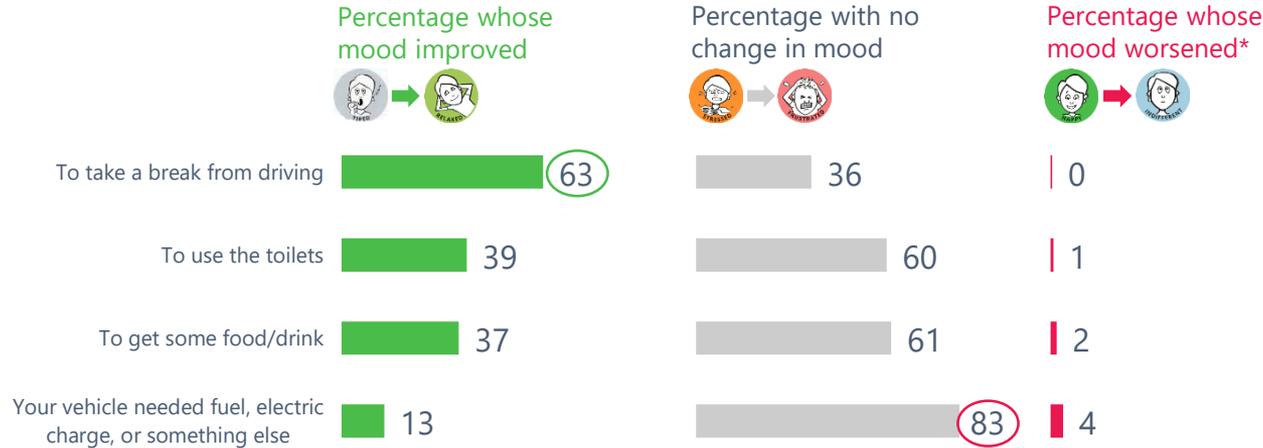


Q5. Which of these images best describes your mood when you first arrived at these services today? Q17 Which of these images best describes your current mood after your visit?
 Base: all respondents (1210), Drive for a living (169), Commute (127), Business (271), Leisure (632), HGV (106)

Reasons for stopping which are more/less likely to improve mood

Taking a break from driving is the purpose of stop which is most likely to have a positive impact on mood.

Main reason for visiting, by change in mood (%)



Mood was coded into sentiment as follows: Positive: happy/relaxed; Neutral: indifferent; Negative: stressed/frustrated/tired. Change in mood is based on sentiment change: improved are those moving from negative to neutral/positive or neutral to positive; worsened are those moving from positive to neutral/negative and neutral to negative; no change in mood are those for which sentiment does not change.

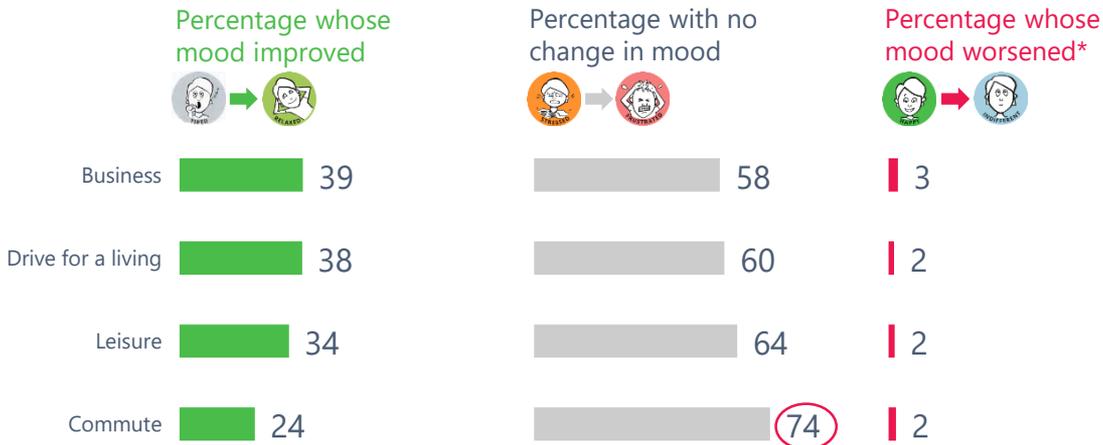
Q9. What was the main reason for deciding to stop here? Base: get food/drink (524), take a break (207), use toilets (112), get fuel etc. (276)

*CAUTION: low base

Journey types more/less likely to improve mood

Commuters are the least likely to have a positive mood change after a stop

Journey purpose, by change in mood (%)



Mood was coded into sentiment as follows: Positive: happy/relaxed; Neutral: indifferent; Negative: stressed/frustrated/tired. Change in mood is based on sentiment change: improved are those moving from negative to neutral/positive or neutral to positive; worsened are those moving from positive to neutral/negative and neutral to negative; no change in mood are those for which sentiment does not change.

Q9. What was the main reason for deciding to stop here? Base: business (271), drive for a living (169), leisure (632), commute (127)

*CAUTION: low base

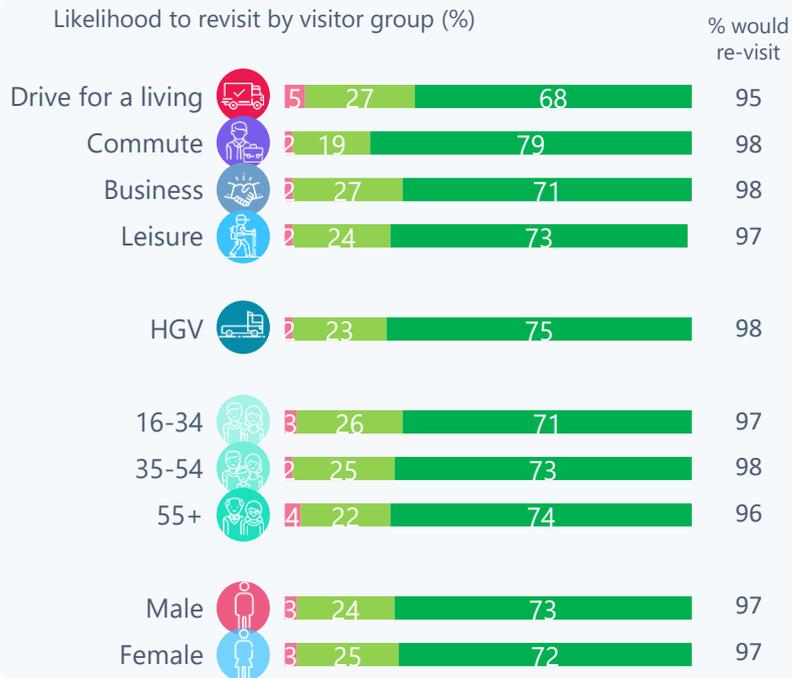
Likelihood to re-visit

The likelihood to re-visit the same services again is high: 97% would definitely or probably stop again. This is very consistent across different user groups, with those driving for a living the least likely to re-use

Likelihood to revisit (%)



Likelihood to revisit by visitor group (%)



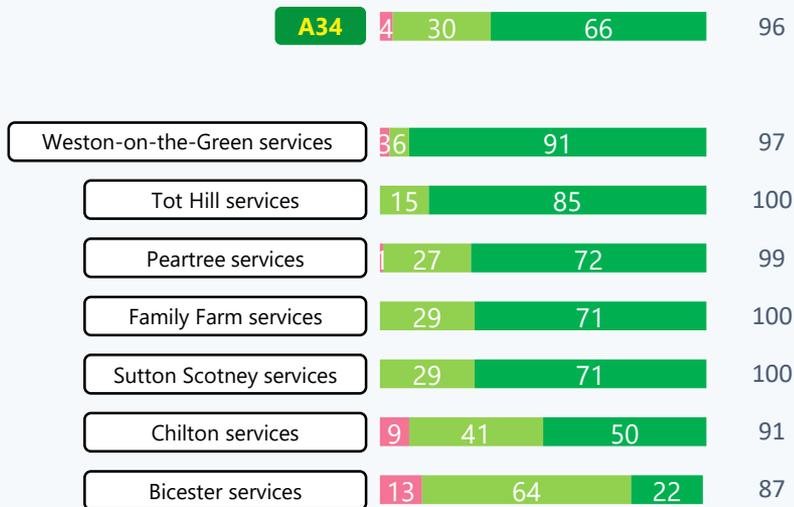
Q16. How likely would you be to stop again at these services in the future? Base: all respondents (1210), Drive for a living (169), Commute (127), Business (271), Leisure (632), HGV (106), 16-34 (390), 35-54 (568), 55+ (247), Male (772), Female (437)

Likelihood to re-visit

Likelihood to re-visit the same services again is high across most locations, particularly for the A3. Bicester services and the Chilton services, both on the A34, have the lowest likelihood to re-visit, albeit around 90%. Both are small petrol stations with limited other facilities.

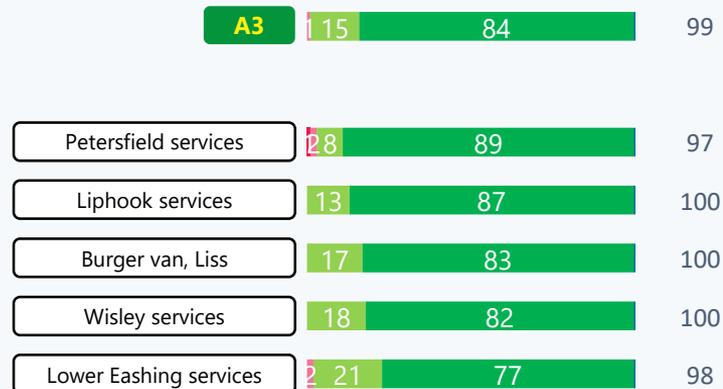
Likelihood to re-visit A34 (%)

% would re-visit



Likelihood to re-visit A3 (%)

% would re-visit

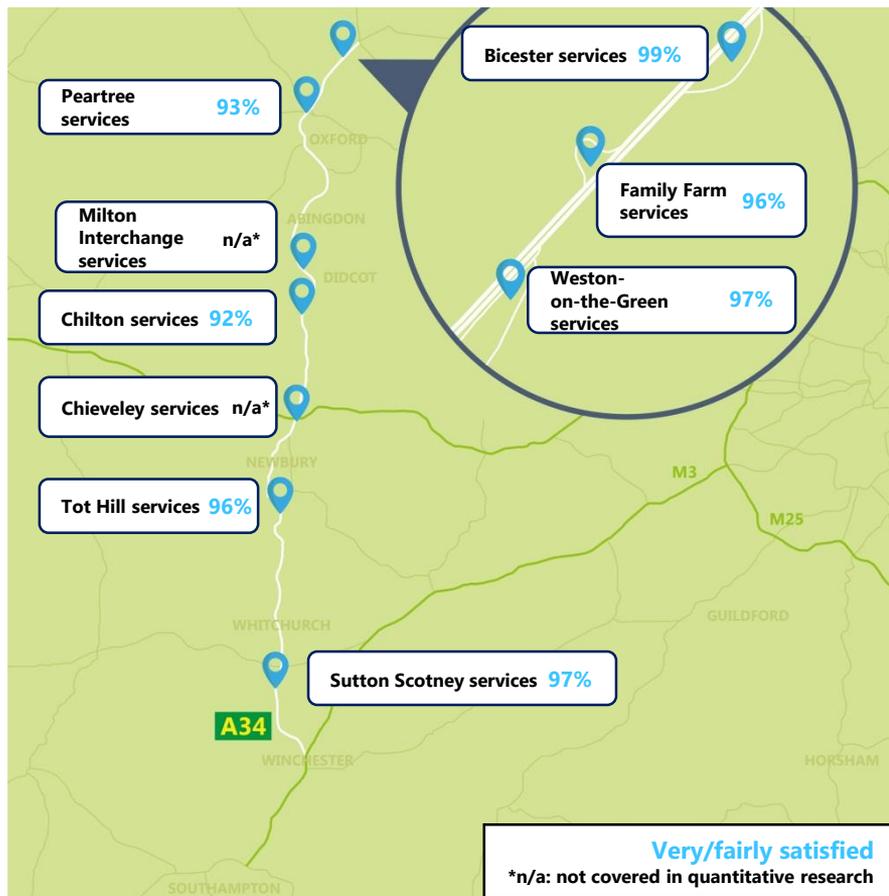


■ Definitely would not stop here
 ■ Probably would not stop here
 ■ Probably would stop here
 ■ Definitely would stop here

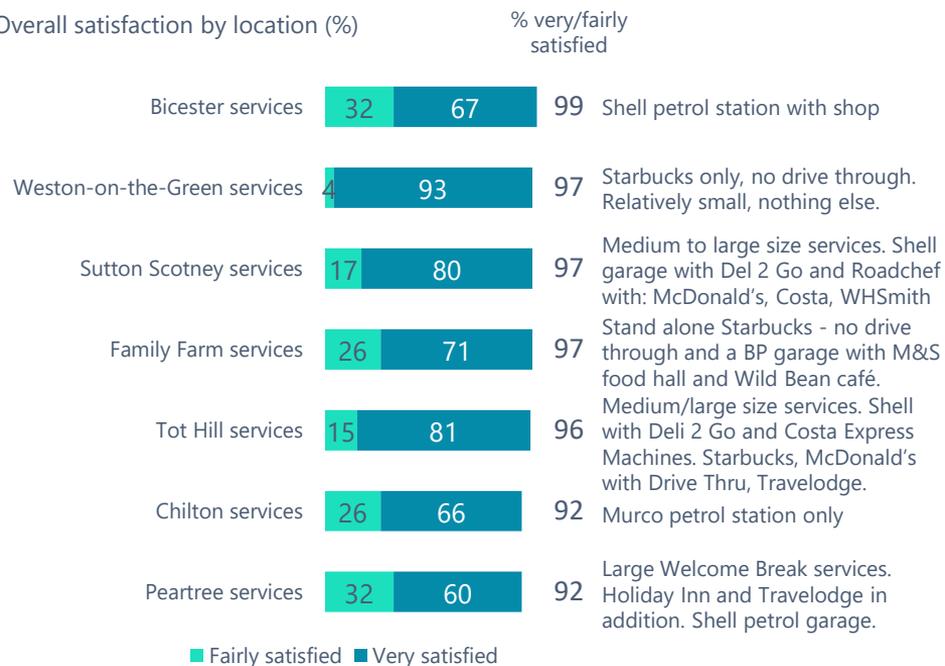
Q16. How likely would you be to stop again at these services in the future?

Base: all respondents (1210), Bicester services A34 (112), Family Farm services (126), Weston-on-the-Green services (114), Peartree services(108), Chilton services (98), Tot Hill services (108), Sutton Scotney services (107), Wisley services (99), Lower Eashing services (104), Liphook services (103), Burger van, Liss (24), Petersfield services(106)

Overall satisfaction across services on the A34



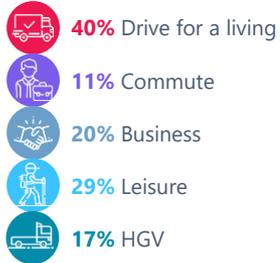
Overall satisfaction by location (%)



Q8. Overall, how satisfied are you with your experience at these services today? Base: Bicester services A34 (112), Family Farm services (126), Weston-on-the-Green services (114), Peartree services (108), Chilton services (98), Tot Hill services (108), Sutton Scotney services (107)

A34 Services – summary results by location (1/4)

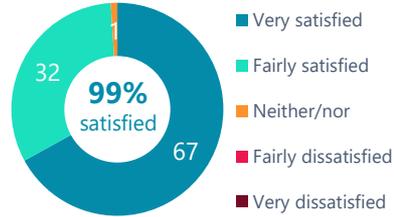
Journey purpose



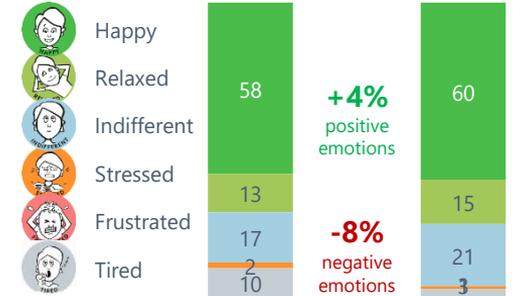
Main reason for stopping



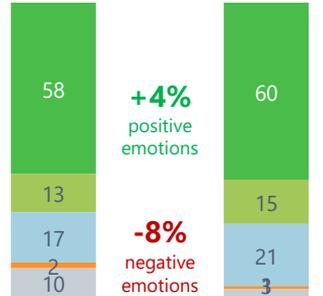
Overall satisfaction



Mood on arrival



Mood after visit

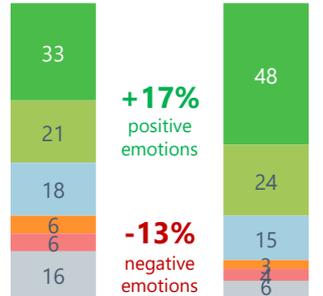
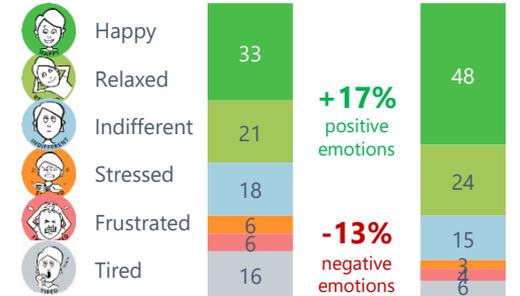
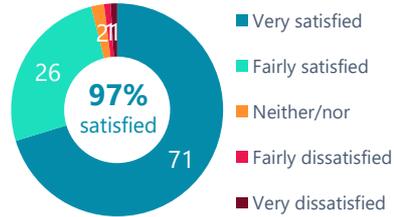
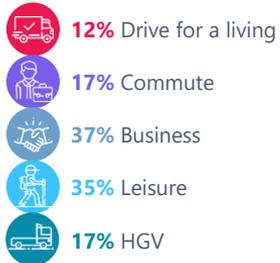


Bicester services

Shell petrol station with shop

Family Farm services

Stand alone Starbucks - no drive through and a BP garage with M&S food hall and Wild Bean café

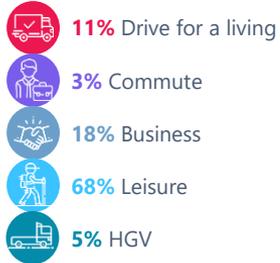


Base: Shell garage (112), Family Farm (126)

A34 Services – summary results by location (2/4)

Journey purpose

Weston-on-the-Green services

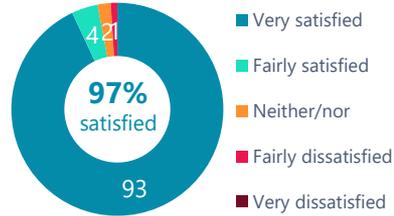


Starbucks only, no drive through. Relatively small, nothing else.

Main reason for stopping

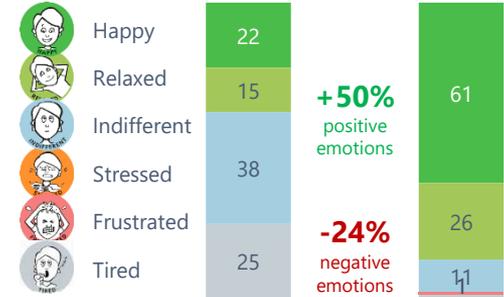


Overall satisfaction

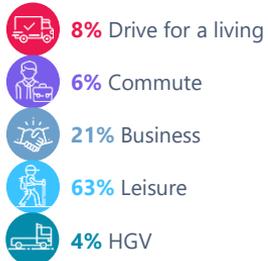


Mood on arrival

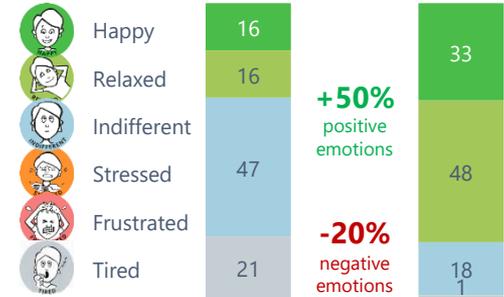
Mood after visit



Peartree services



Large Welcome Break services. Holiday Inn and Travel lodge in addition. Shell petrol garage



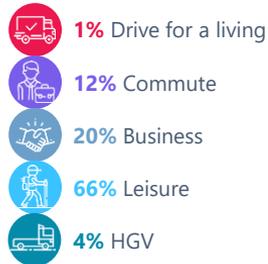
Base: Starbucks (114), Peartree (108)

A34 Services – summary results by location (3/4)

Chilton services

Murco petrol station only

Journey purpose



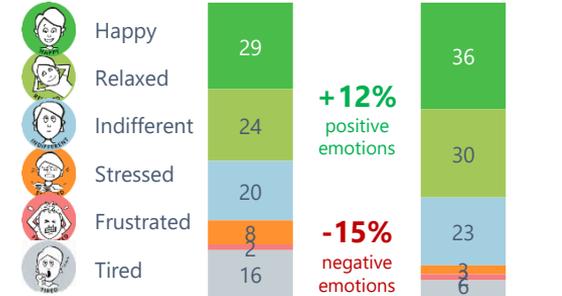
Main reason for stopping



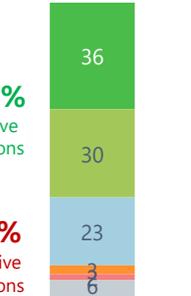
Overall satisfaction



Mood on arrival

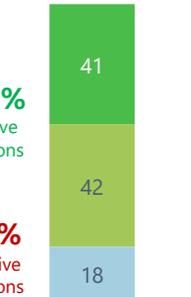
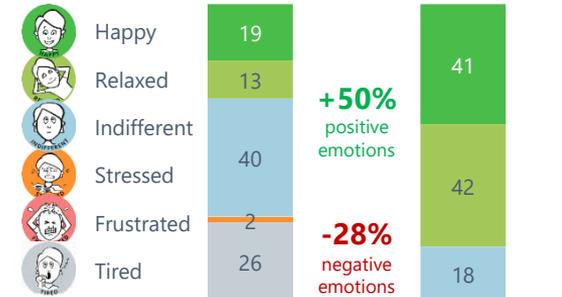
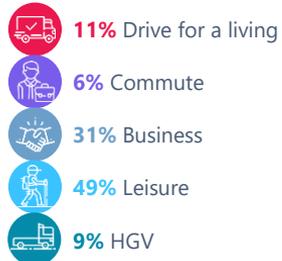


Mood after visit



Tot Hill services

Medium/large size services. Shell with Deli 2 Go and Costa Express Machines. Starbucks, McDonald's with Drive Thru, Travelodge



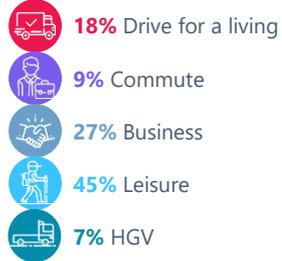
Base: Murco (98), Tot Hill (105)

A34 Services – summary results by location (4/4)

Sutton Scotney services

Medium to large size services. Shell garage with Del 2 Go and Roadchef with: McDonald's, Costa, WHSmith

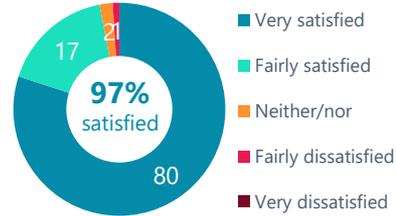
Journey purpose



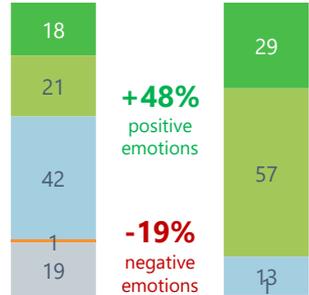
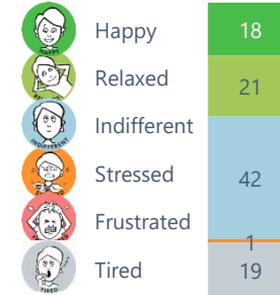
Main reason for stopping



Overall satisfaction

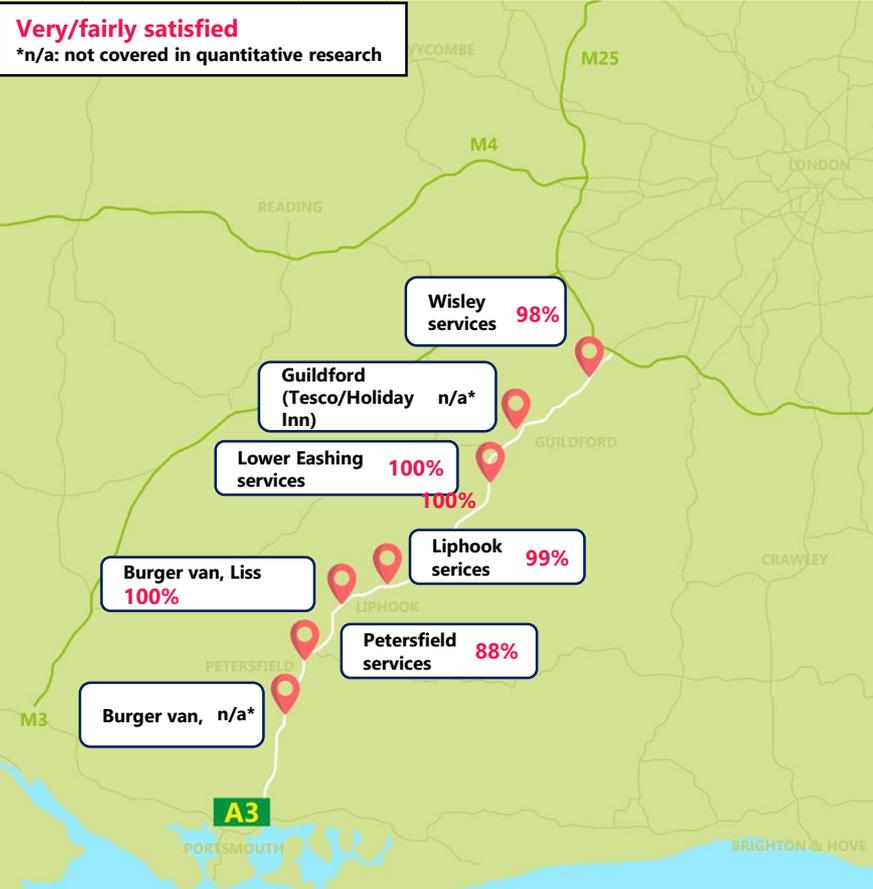


Mood on arrival



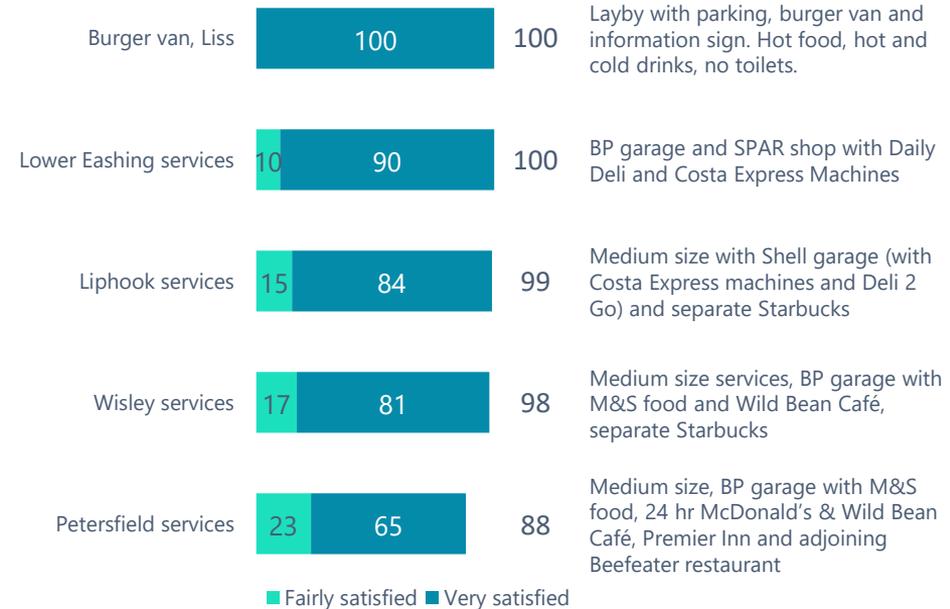
Base: Sutton Scotney (106)

Overall satisfaction across services on the A3



Overall satisfaction by location (%)

% very/fairly satisfied



Q8. Overall, how satisfied are you with your experience at these services today? Base: Wisley (99), Lower Eashing (104), Liphook (103), Burger van Liss (24), Petersfield (106)

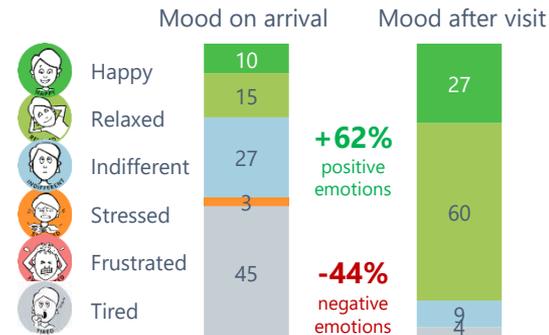
A3 Services – summary results by location (1/2)

Wisley services

Medium size services, BP garage with M&S food and Wild Bean Café, separate Starbucks

Journey purpose

- 9% Drive for a living
- 13% Commute
- 19% Business
- 54% Leisure
- 4% HGV

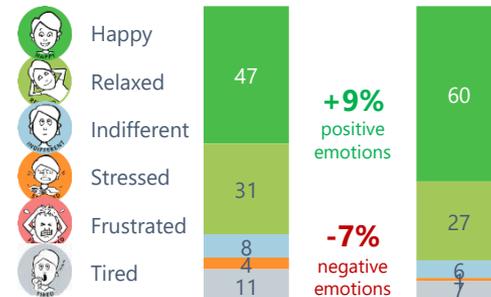


Lower Eashing services

BP garage and SPAR shop with Daily Deli and Costa Express Machines

Journey purpose

- 4% Drive for a living
- 8% Commute
- 7% Business
- 82% Leisure
- 0% HGV

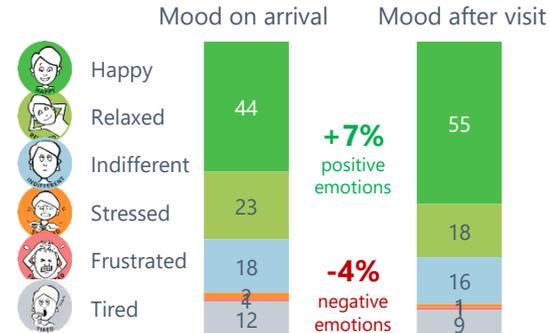
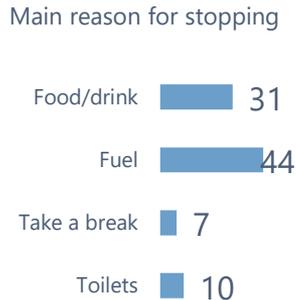


Base: Wisley (100), Lower Eashing (104)

A3 Services – summary results by location (2/2)

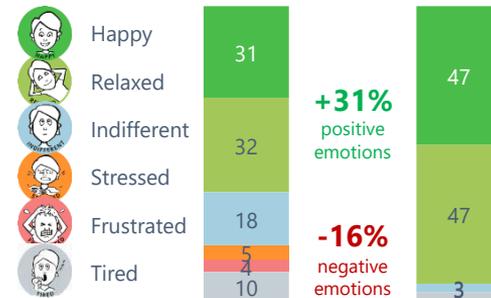
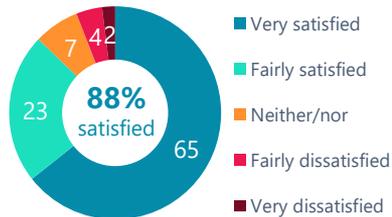
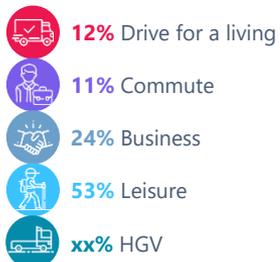
Liphook services

Medium size services, BP garage with M&S food and Wild Bean Café, separate Starbucks



Petersfield services

BP garage and SPAR shop with Daily Deli and Costa Express Machines

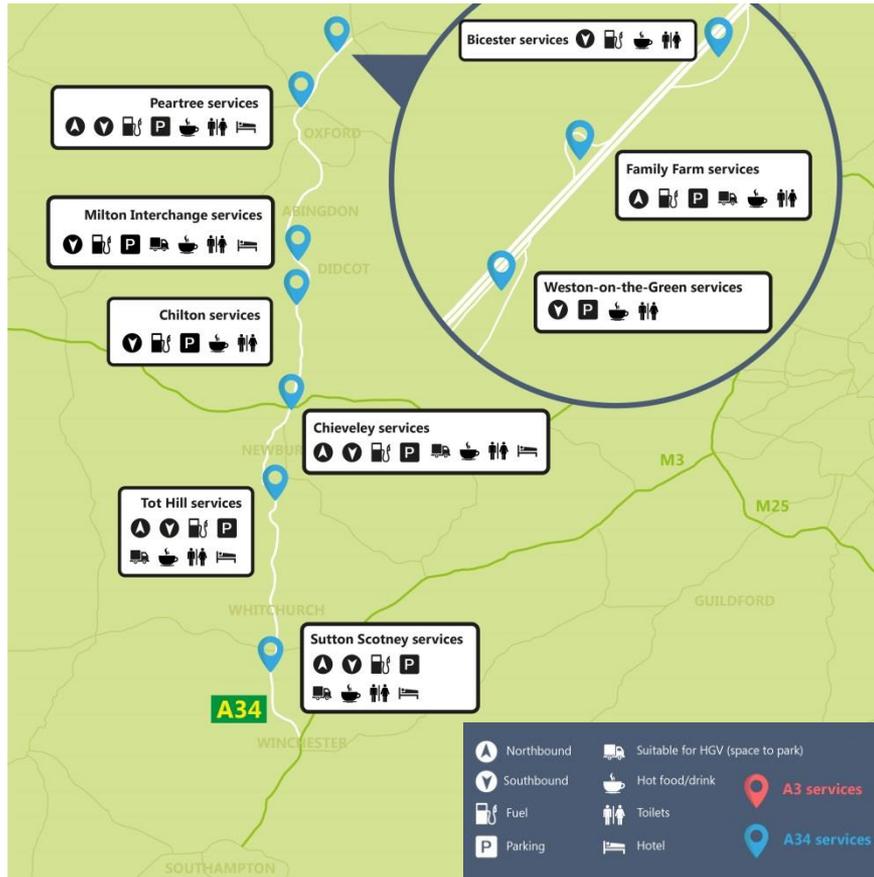


Base: Liphook (103), Petersfield (106)



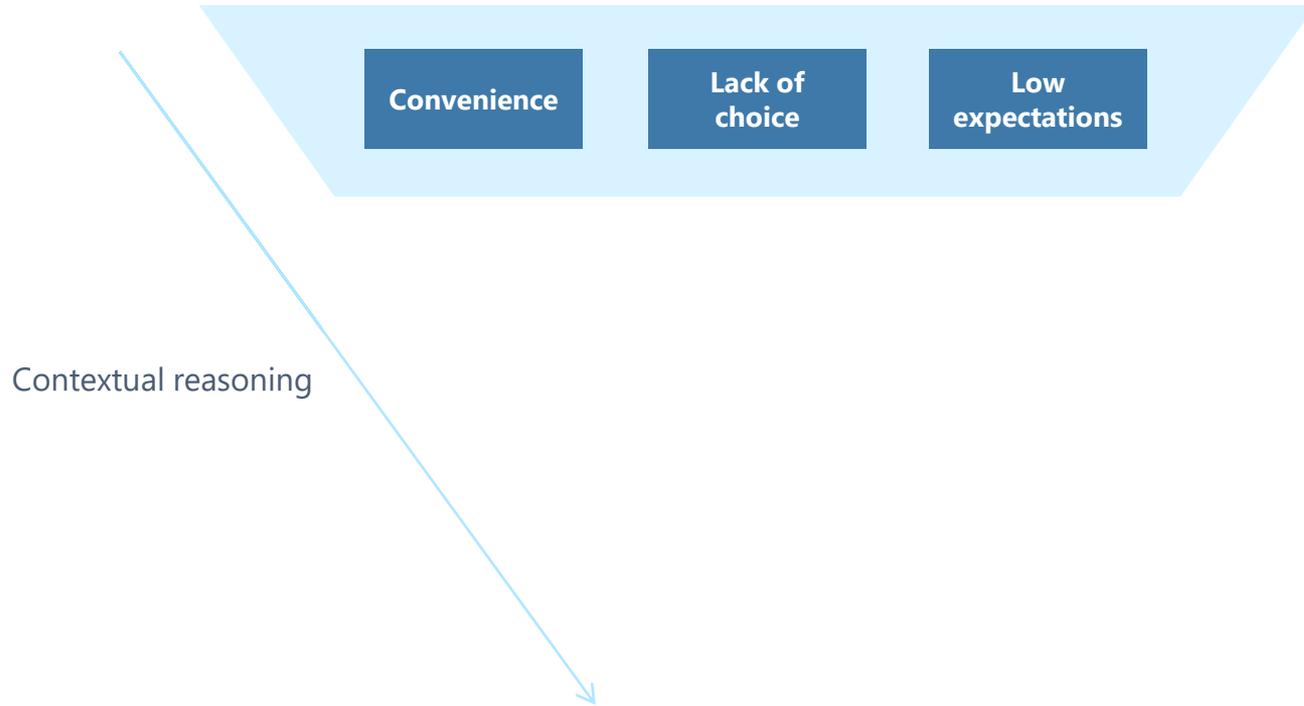
Journey context

What is available, and where?



The reasons for high satisfaction

Contextual pyramid



The reasons for high satisfaction

Convenience and lack of choice

Convenience is key

The majority of visits are very **functional pit-stops**

Rarely about being an **'experience'**

Users want to **get in and get out**, as quickly as possible

Half of stops (51%) are **spontaneous**

General **lack of choice**/facilities: most don't want to hang around

Lack of choice ties in with feeling like a captive audience, which frames how people view value for money

"You just want to go in, do what you need to do, then get back in your car and continue with your journey."
Commuter, A34

"When we're travelling so many miles and on the clock then a cup of coffee and the toilet is all we need and then we're gone."
Business, A34

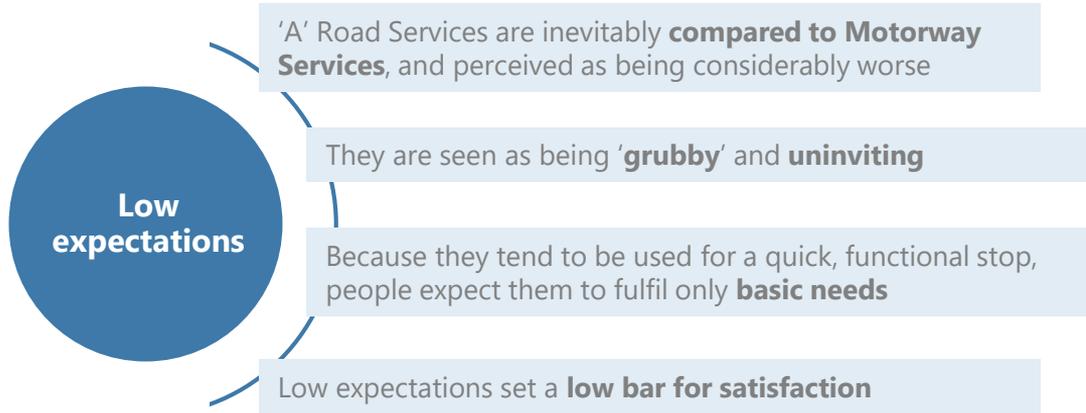
"I use it because I don't have a choice. But it would be nice to have more choice of food and things."
Drive for a living, A3

Q10. Did you intend to stop at these particular services before you set off today? Base: (1199), No (616)

Q12. Which of the following have you done here today? Base: All except burger van visitors (1186)

The reasons for high satisfaction

Low expectations



"They are different to the motorway ones. But it's a different purpose – it's just a pit stop. You don't want to spend too long in there anyway."

Leisure, A34

"They tend to be just a grubby garage, a grubby McDonald's and then a grubby Travelodge. I think grubby is the word I'd use!"

Business, A34

"They're not huge but they're adequate..."

Commuter, A3

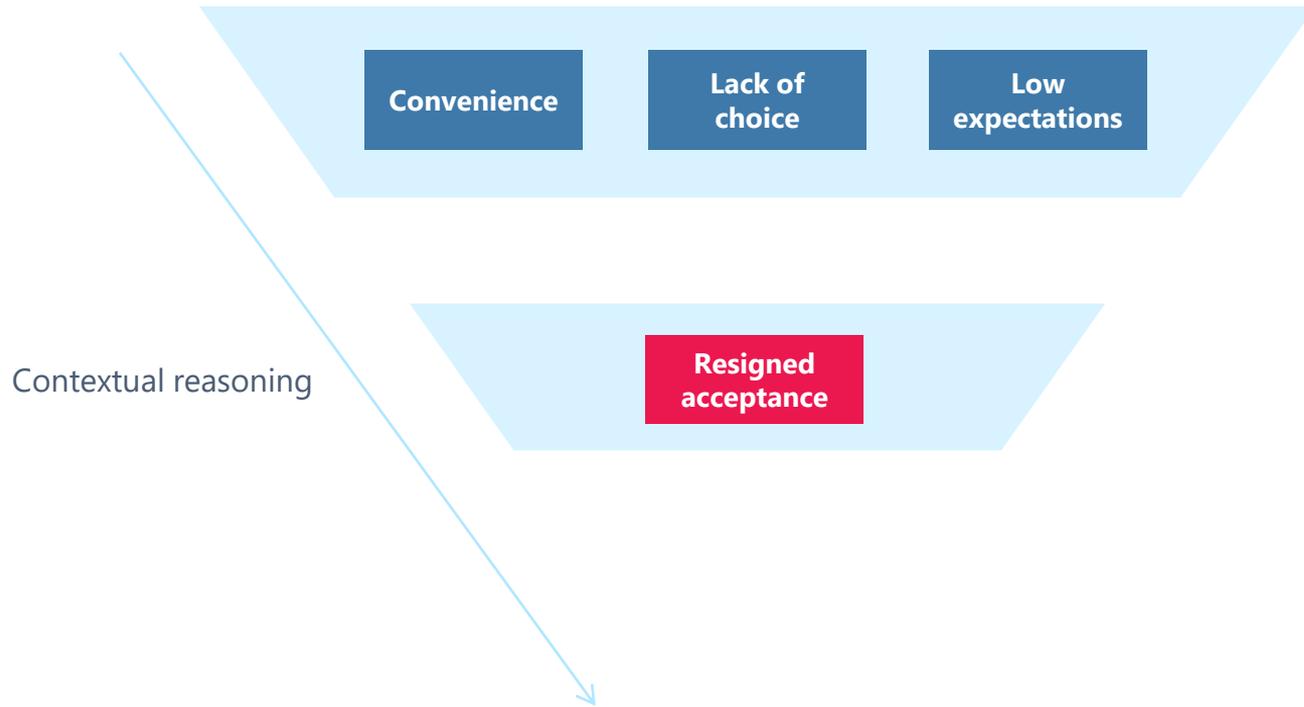
"My stops tend to be just when my small child needs something so it's just pot luck."

Leisure, A3

Q11. Thinking about your arrival at these services today, please rate the following. Base (1171), Very good (726), Fairly good (328)

The reasons for high satisfaction

Contextual pyramid



The reasons for high satisfaction

Resigned acceptance

"I feel like I don't have that high expectation of a service station on an A road. I'm not expecting Michelin star food or anything like that. For me it's just somewhere where I can have a quick wee, somewhere I can grab a quick drink. So as long as there's some form of coffee shop, whatever it may be."

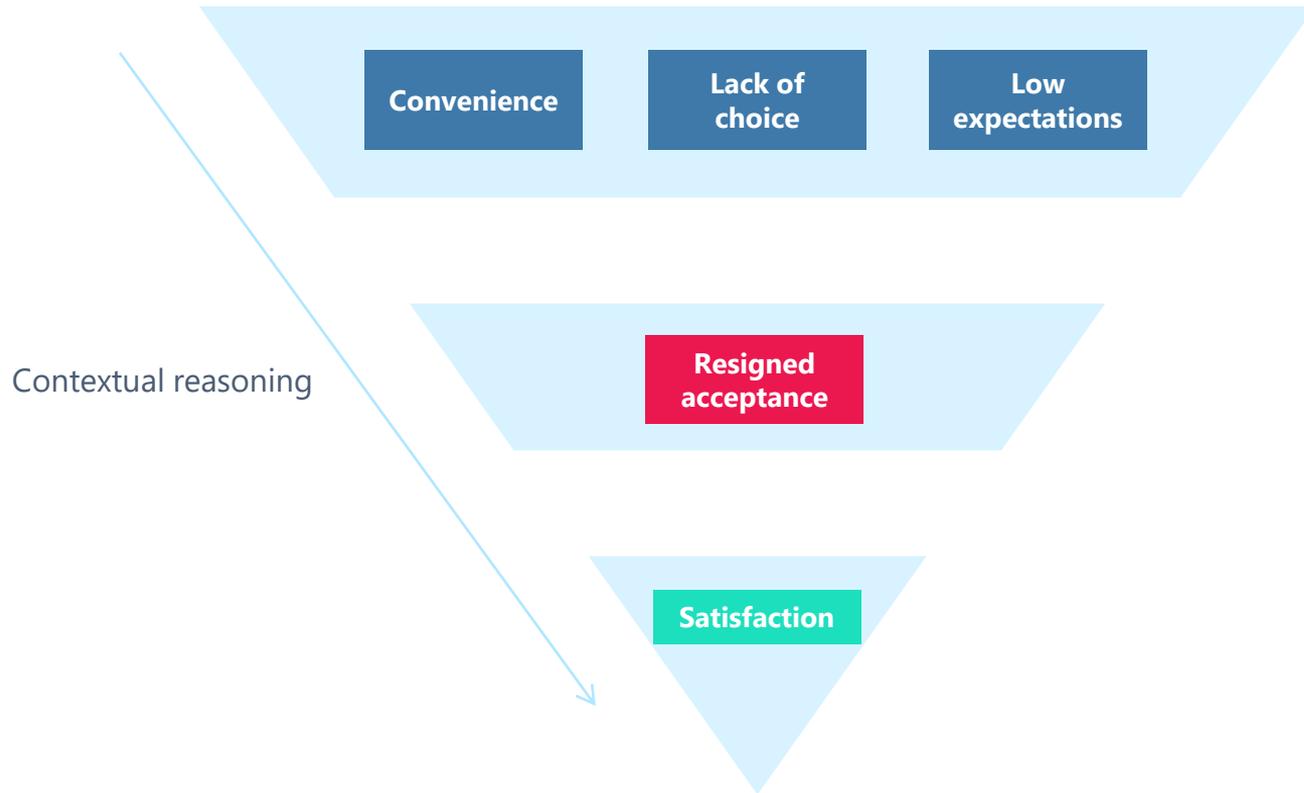
Business, A34

"It is what it is. They [A Road Services] are not fantastic, but they don't need to be. They could be better and there could be more options. And they could feel a bit nicer and cleaner. But they don't need to be."

Commuter, A3

The reasons for high satisfaction

Contextual pyramid

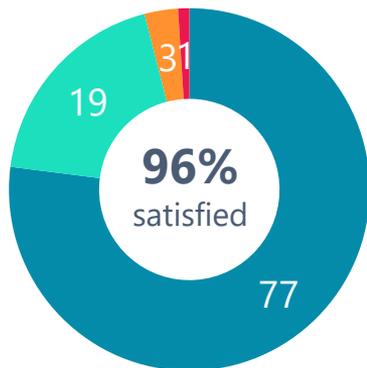


Overall satisfaction

Whilst satisfaction is very high, is it framed by the context of journeys and expectations of users

Overall satisfaction (%)

- Very satisfied
- Fairly satisfied
- Neither/nor
- Fairly dissatisfied
- Very dissatisfied



A Road Services

Overall satisfaction is high at A Road services, likely linked to the nature of visits and low expectations on A Roads



Q8. Overall, how satisfied are you with your experience at these services today? Base: all respondents (1210)

Qualitative overall impressions

Tended to be less positive than the quantitative results. This reinforces the need to keep in mind the context of resigned acceptance and the reasons why people use 'A' Road services

Respondents frequently mentioned that 'A' Road Services are:

Pretty good

A bit grubby

Expensive

Basic

Serve their
purpose

Limited

*"I think they're **pretty good**. They're **pretty clean**, you have the odd one that's sometimes not. Like Tot Hill that always looks quite reasonable, the one in Newbury is good, but it's bloody confusing getting in and out of."*

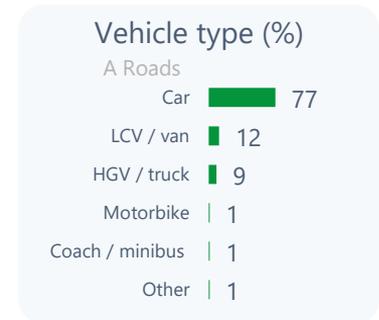
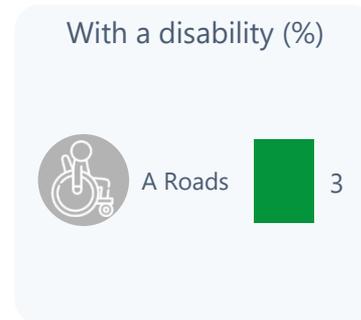
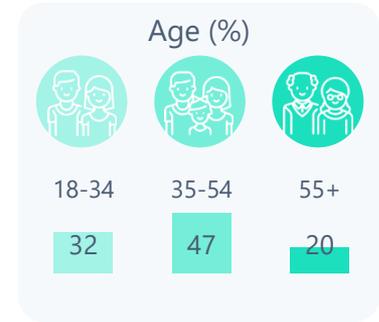
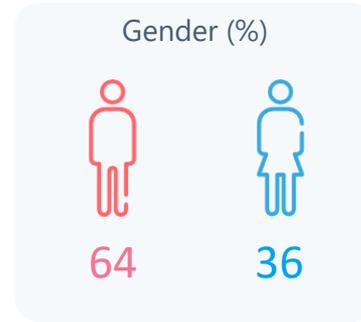
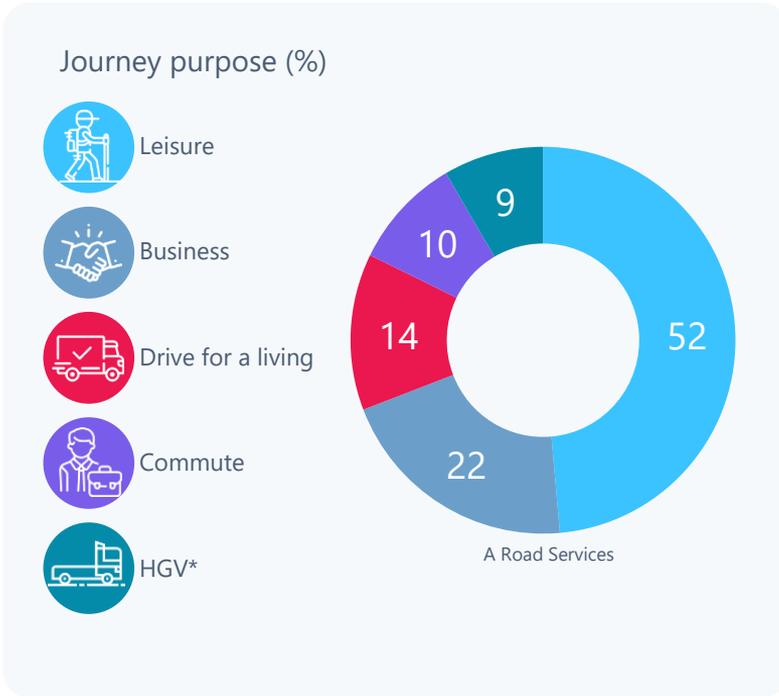
*"Pretty **basic**. It's a **grubby** McDonald's and garage and a Travelodge."*

*"Most garages you stop at you know it's going to be **expensive** and you know you're probably not going to get a choice that you want, it'll be **limited**. There's not satisfying food that you want, **you have to make do** with what they've got...some services have 3 or 4 different food outlets and a couple of different shops where you've got the choice whereas a lot of them particularly on the A3 are smaller ones...you can't expect...**you can't be fussy** and think I want this."*

Tended to be less positive than the quantitative results. This reinforces the need to keep in mind the context of resigned acceptance and the reasons why people use A Road services (as discussed earlier)

Who are users of 'A' Road Services?

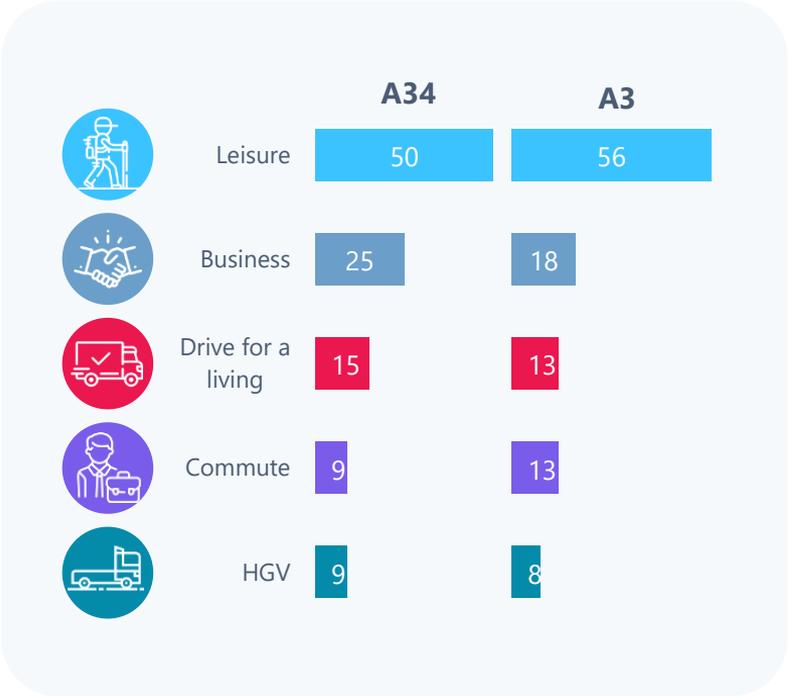
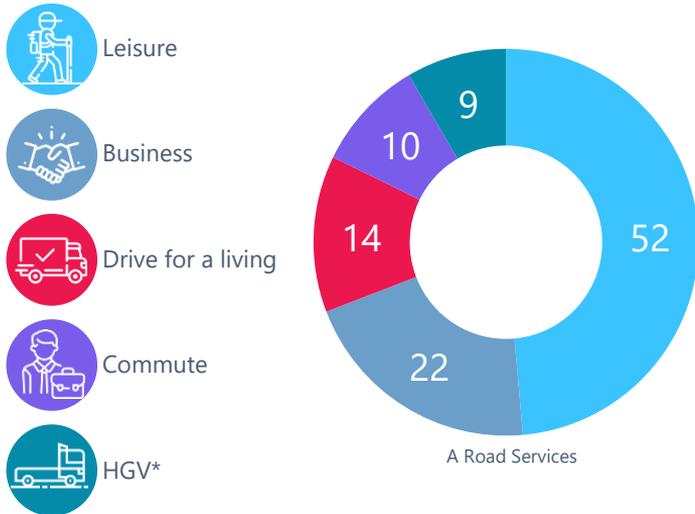
User profile



*HGV: visited in an HGV or truck regardless of journey purpose
Base: all respondents A Roads (1210)

Journey purpose

Journey purpose (%)



*HGV: visited in an HGV or truck regardless of journey purpose
 Q1. For your journey today, are you....
 Base: all respondents (1210), A34 (773), A3 (437)

The main user groups of 'A' Road Services

Visitor profiles from the quantitative survey

Journey type →



Leisure



Business



Professional

(drive for a living)



Commuting



HGV drivers

(a subset of the professional drivers)

Mode of transport

Most likely to be travelling by **car** (96%)

Majority driving a **car** (77%) but also Light Commercial Vehicle/van (18%)

Driving either **HGV** (54%) or Light Commercial Vehicle/ van (34%)

Mostly drive a **car** (80%) but also Light Commercial Vehicle/van (18%)

n/a



Average journey length (median hours)

2.8

3.4

6.2

1.1

6.8



Reason for stopping

For **food/drink** (44%) or vehicle needed **fuel** etc. (24%)

For **food/drink** (41%) or vehicle needed **fuel** etc. (23%)

For **food/drink** (37%) or to **take a break** (30%)

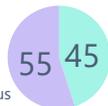
Majority (55%) stopping for **food/drink**

A third (34%) stopping to **take a break** and another third (33%) for **food/drink**



Planning in advance

Planned
Spontaneous



Age

A **relatively young** group, with 35% aged 18-34

Majority (61%) are between **35 and 54** years old

A range of ages: 26% 18-34, 54% 35-54, 20% 55+

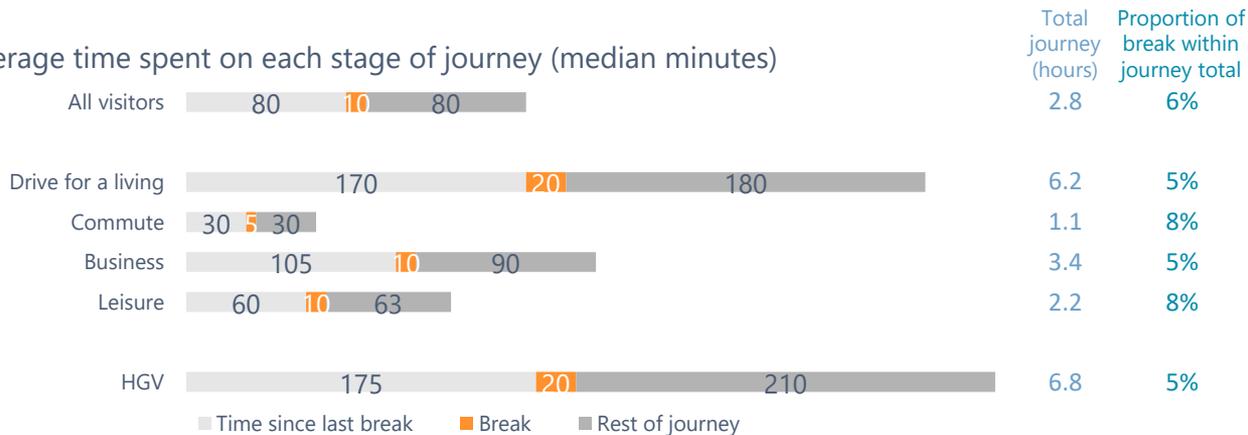
The **youngest group**, with 45% aged under 35

The **oldest group**: 30% 55+ and 58% 35-54

Journey length and time spent at services



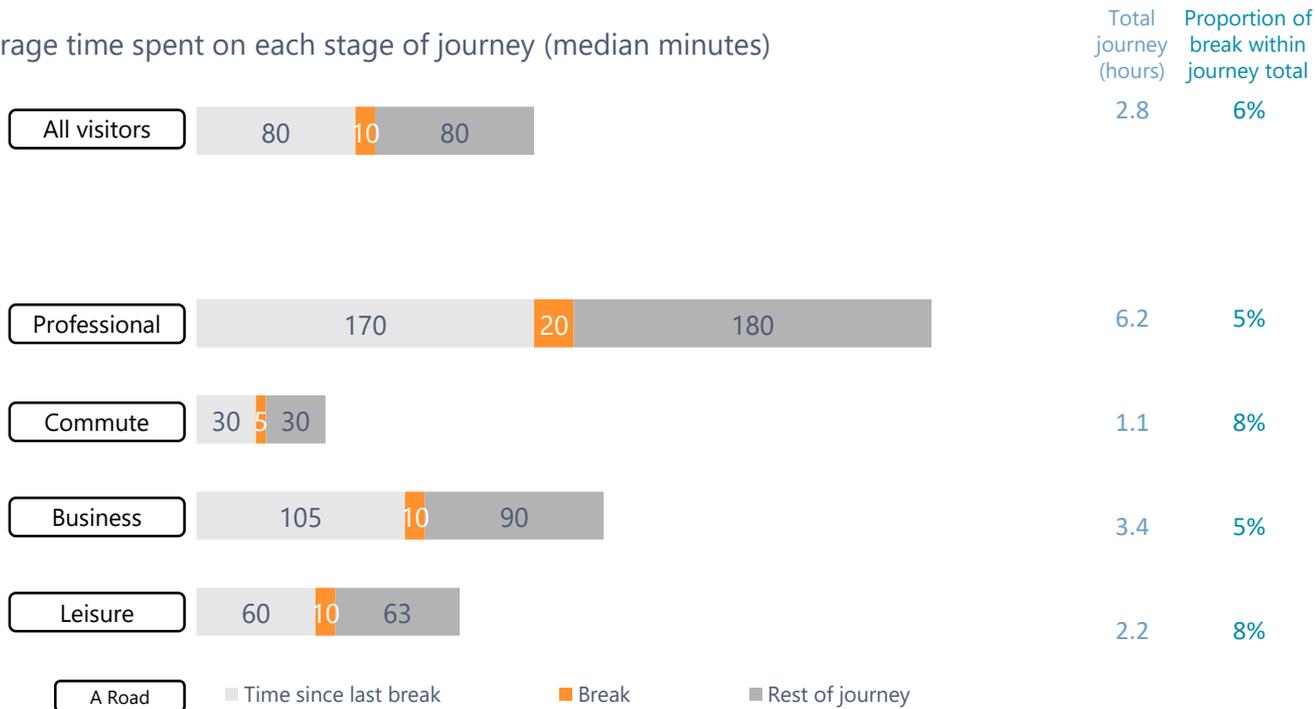
Average time spent on each stage of journey (median minutes)



Q3. How long will your whole journey today take (excluding the time spent here)? Q4. How long is it since you set off, or last took a break from driving? (excluding the time spent here)
 Q6. How long have you spent here today, after parking? Base: all respondents (1210), drive for a living (169), commuter (127), business (271), leisure (632), HGV (106)

Journey length and time spent at services

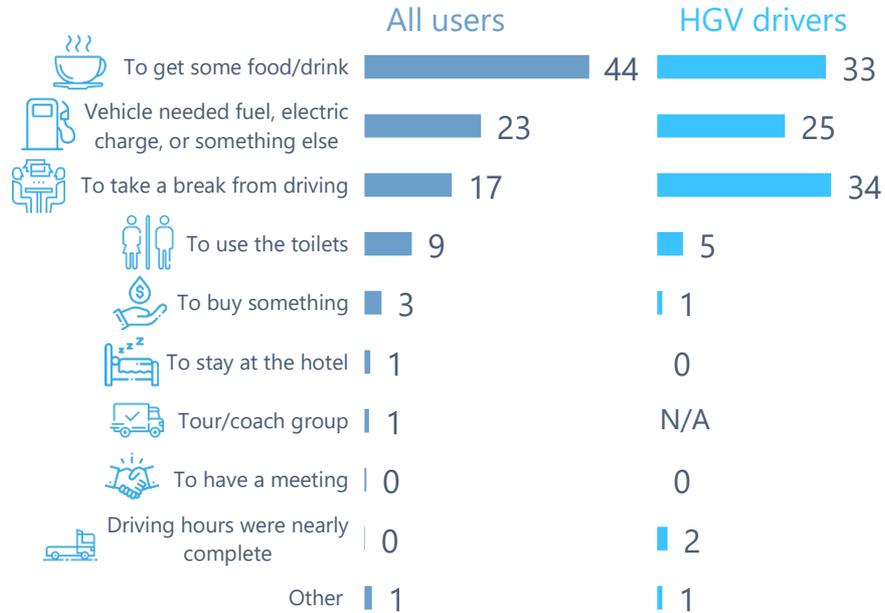
Average time spent on each stage of journey (median minutes)



Q3. How long will your whole journey today take (excluding the time spent here)? Q4. How long is it since you set off, or last took a break from driving? (excluding the time spent here)
 Q6. How long have you spent here today, after parking? Base: all respondents (1210), drive for a living (169), commute (127), business (271), leisure (632), HGV (106)

Users: reason for stopping

The main reason that people use 'A' Road services is to get some food/drink, followed by needing fuel or to take a break. For HGV drivers taking a break is much more important

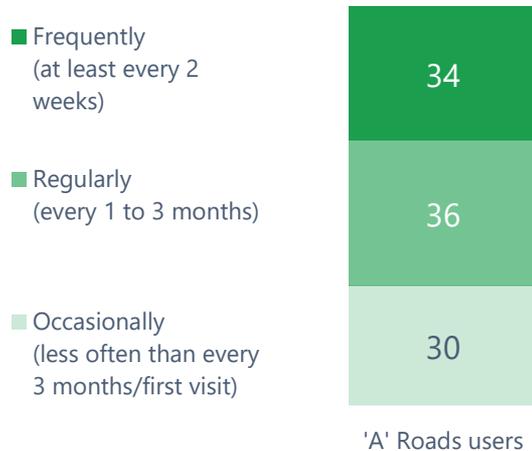


Q9. What was the main reason for deciding to stop here? Base: all respondents (1210), HGV drivers (106)

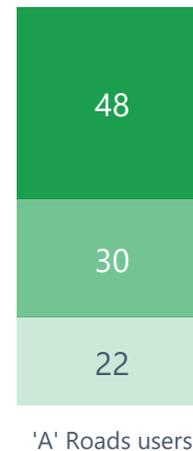
Frequency of visiting 'A' Road Services

Users of 'A' Road Services tend to be quite frequent users: around a third (34%) visit the same 'A' Road Services at least once every two weeks, and almost half (48%) visit other 'A' Road Services at least once every two weeks.

Frequency of visiting this 'A' Road Services (%)



Frequency of visiting other 'A' road services (%)

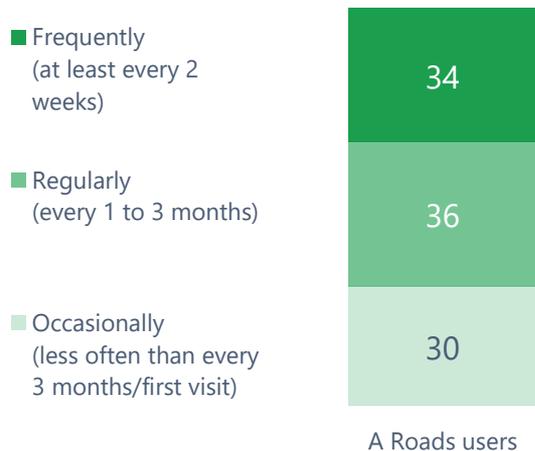


Q19. Approximately, how often do you stop at... Base: all respondents 'A' Roads (1210)

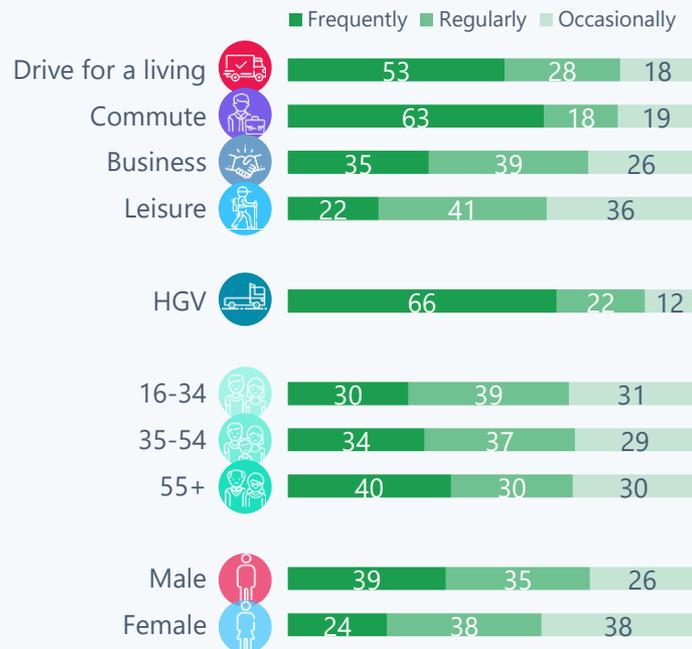
Frequency of visiting this 'A' Road Services

'A' Road Services users are frequent visitors - HGV drivers and non-leisure users (in particular commuters) are the most frequent repeat visitors to the specific service location where we interviewed them.

Frequency of visiting this A Road Services (%)



Frequency of visiting this A Road Services (%)

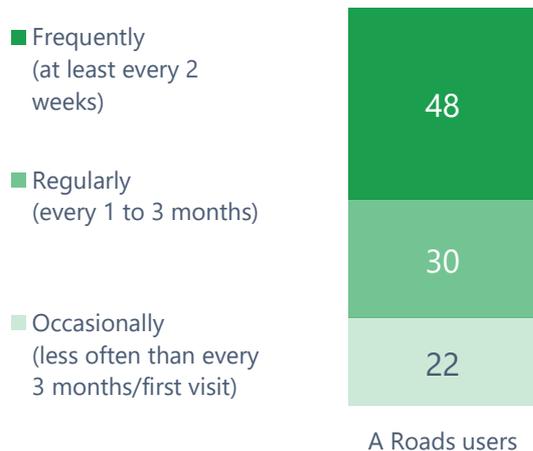


Q19. Approximately, how often do you stop at... Base: all respondents (1210), drive for a living (169), commute (127), business (271), leisure (632), HGV (106), 16-34 (391), 35-54 (568), 55+ (247), male (772), female (438)

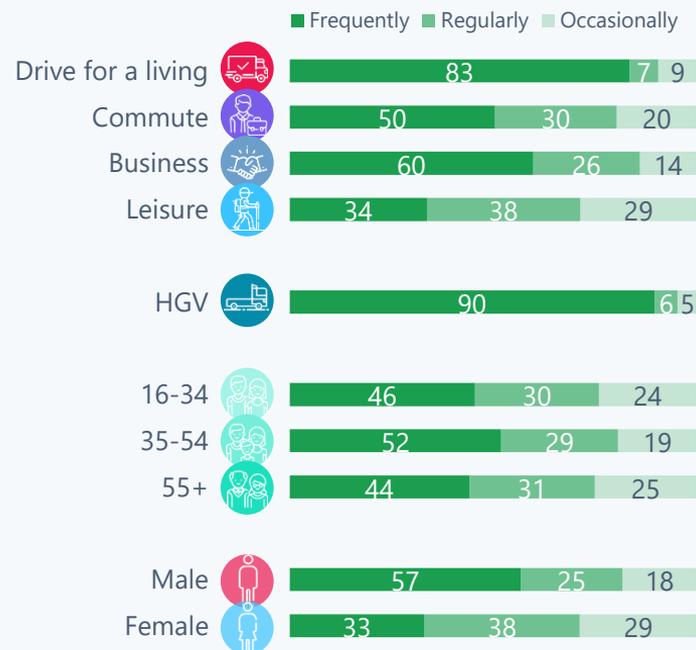
Frequency of visiting other services

'A' Road Services users tend to frequently use different services (either 'A' Road or Motorway services), with 48% using other services frequently. This is driven by HGV drivers, those driving for a living and business travellers.

Frequency of visiting other services (%)



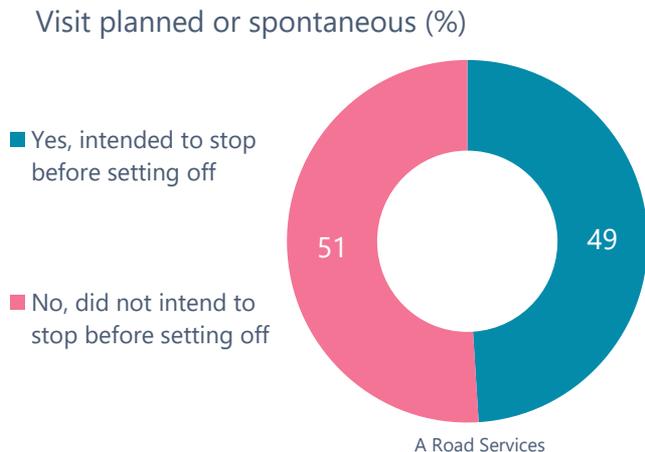
Frequency of visiting other services (%)



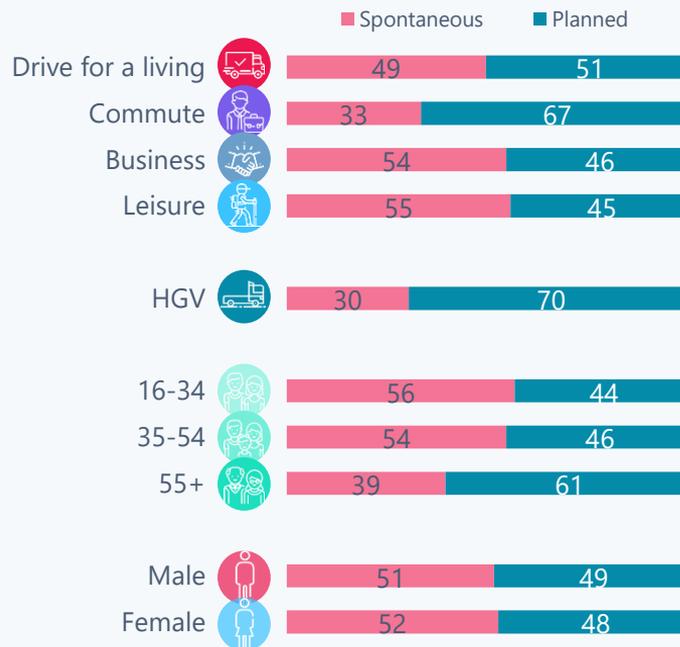
Q19. Approximately, how often do you stop at... Base: all respondents (1210), drive for a living (169), commute (127), business (271), leisure (632), HGV (106), 16-34 (391), 35-54 (568), 55+ (247), male (772), female (438)

Users: whether visit was planned or spontaneous

When planning stops on 'A' Roads, half did not intend to stop at the services before setting off and half planned the stop in advance



Visit planned or spontaneous (%)

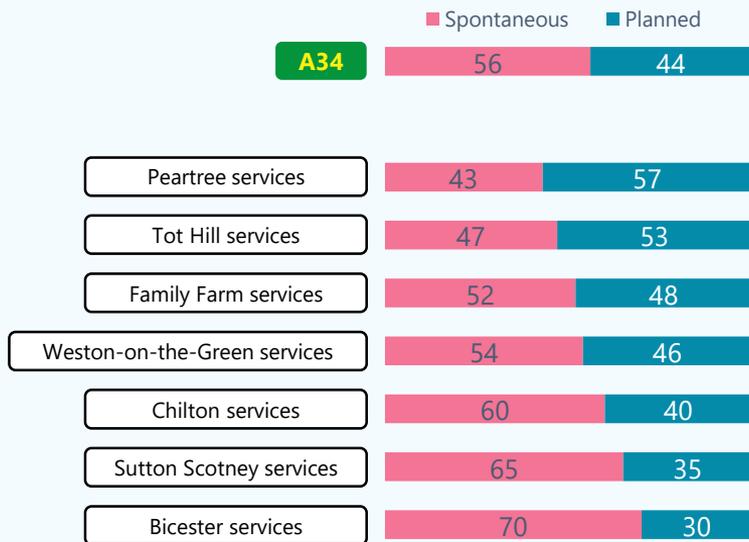


Q10. Did you intend to stop at these particular services before you set off today?

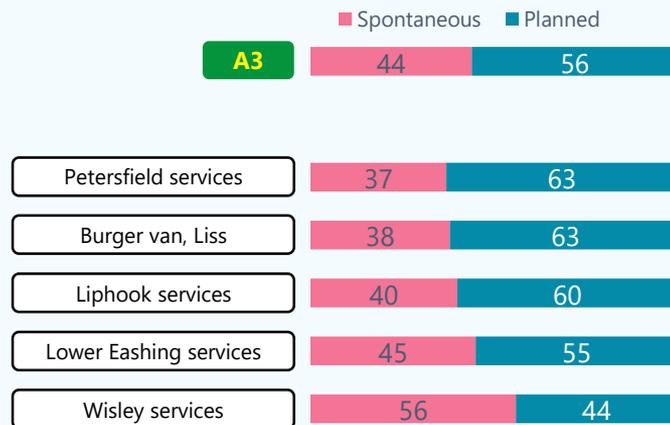
Base: all except tour/coach groups (1199), Drive for a living (169), Commute (127), Business (271), Leisure (632), HGV (106), 16-34 (389), 35-54 (565), 55+ (241), Male (766), Female (433)

Users: whether visit was planned or spontaneous

Visit planned or spontaneous A34 (%)



Visit planned or spontaneous A3 (%)



Q10. Did you intend to stop at these particular services before you set off today?

Base: all except tour/coach groups (1199), Drive for a living (169), Commute (127), Business (271), Leisure (632), HGV (106), 16-34 (389), 35-54 (565), 55+ (241), Male (766), Female (433)

Case study

Regular business traveller, using services frequently



Selena

Regular business traveller

Travelling solo

A34

User of services

47 years old



Type of journey

I travel **every day for work**.

All around the local area, but regularly to Oxford.

There's no need to plan the route – I'm **really familiar with the roads**, especially the A34 and the M4.

"I'm always on the road, up and down the A34 for work. I have to go to Oxford a lot from home [in Swindon], so I'll drive along the M4 to Newbury and then get on the A34 up to Oxford."

"The food is definitely more expensive, but that doesn't bother me that much because it's very quick and easy...The petrol prices are more frustrating and I do notice the difference. But I need it for work and I expense the cost so I'll try to get the best price, but if you need petrol you need petrol."

Using services

I **use services all the time**, normally just when I need to stop so it's **not planned**.

I'll **stop for all kinds of things**: grab a cup of tea, fill up petrol, get something to eat, use the toilets, make a call for work and sometimes I'll even do some food shopping on the way home.

I'll normally stop at **Chieveley**, mainly out of habit and also because it's the best place to do a bit of work.

But **I'll use any other services** and there aren't any I'd avoid – I just use whatever is on offer when the need arises. Quite often I'll need to make a call so I'll just pull off the road when I need to.

Priorities

It's all about **convenience**: normally it's a very functional visit where I just need to get some fuel, do a bit of work and get a quick drink. And I'm working so it needs to be quick.

I don't like fast food so I prefer to get lunch in a town rather than the services. You get better **healthy options** and more variety. But I will often grab a sandwich if I'm in a hurry as it's really convenient at the services.

I'll normally make calls and **do work from my car** once I've parked and got a drink, because it's more focused and there are no distractions.

Yes it's more expensive but the convenience makes up for it.

Improvements

Food is the main thing I'd improve:

- Get rid of fast food
- Add something healthier and better value where you can sit down, like Wagamama or Pizza Express

Maybe also somewhere **quiet to sit** and work but that's less important to me as I use the car quite happily

Case study

HGV driver, using services and laybys as and when needed



Phil

HGV driver

Driving 5 days a week

A3 and A34

User of services

41 years old



Type of journey

I work for a building materials supplier, making deliveries all over the South of England. **I know the A34 and A3 really well.**

I'm on the road **five or six days a week**, mostly based around our depots in Oxford or Crawley.

I've been driving HGVs for a couple of years but am one of the **less experienced drivers** in the company.

Using services

I have to stop off for **tacho breaks** – that's the main reason I use services. Often I'll use a layby but will stop at services if they're in a good place and they must be big enough for me to pull in. Some are really tight so unless I know the road well, I am really cautious about which services I use.

I'll sometimes also need to **fill up on fuel**. We have a contract with BP so I can only use their petrol stations, which limits where I can stop quite considerably so planning is important.

Priorities

Options: to give me the confidence that there will always be somewhere to pull over if I need it. On the A34, other than Chieveley (which is recommended by our depot) there's only one services that's suitable.

Enough **space for a few lorries to park up** in a designated area.

Access that is large enough for a lorry – there are too many places where you really have to squeeze through narrow corners even though it's "suitable for HGVs"

Safety and security is an issue – I'm responsible for the load, and **theft** from lorries is something we're warned about.

Any tacho break should really have **access to a toilet** and hot water, but most of my stops don't even have a toilet.

"In the past when I've hit traffic and had to stop [for a tacho break] I've had to just pull off the main road and park up on a muddy verge on a country lane...it was really tight for cars to get past...you feel bad because it's dangerous but at the end of the day you have to stop and there's nowhere else."

"You have to plan for these roads. I had to learn a lot from one of the other drivers. I had a kind of training where I went along with him to learn the roads, where are good places to stop, that kind of thing. You pick up tips, and learn from what other drivers are saying."

Improvements

More services which have enough space to pull in and park. Along both the A3 and A34.

Areas with secure parking.

More toilet provision.

"There's not many places to stop. Mostly laybys. And even with laybys they can only fit 2-3 lorries so if there's someone there already you've had it."

Case study

Older driver, with mobility impairment



Keith

Leisure traveller

Retired

Mobility impairment

A34

User of services

69 years old



Type of journey

My main use of A34 is travelling from Berkshire, on the M4, linking with A34 and travelling down to Winchester to **visit my brother**.

It's a journey I make around **once a month** so I know the road quite well.

"Those American style ones where you don't even leave the car...perfect!"

"If there's traffic then I'm much less likely to stop – I'll try to avoid crowds at all costs!...I try to park as close to the building as possible, and sometimes people will even park in a disabled space without a blue badge."

Using services

I actively **avoid anywhere that is likely to be busy**, I prefer to drive to a village nearby to miss the crowds.

Services are pretty good, and I particularly like Chieveley. I will stop to get something to eat and drink on the way, and also to use the toilet. The smaller services could have a much better selection of food

I love it when they have a drive through – it's perfect for me as I don't even need to get out of the car!

I am wary of stopping **when it is dark as I feel vulnerable** with my mobility issues, better lighting and visible security guards would help me feel safe.

Priorities

Cleanliness: particularly the toilet facilities.

Disabled toilets

Parking in close proximity to services: this is not usually an issue and provision is good however there needs to be more in place to prevent non-badge holders from using the allocated spaces.

Security and safety: top of mind – especially at night more lighting is needed at the A34 services, more staff at night would help combat this.

Improvements

Increased **security** at night

24 hour opening times

Better selection of **food options**.

Signage for the exit routes and also at night.

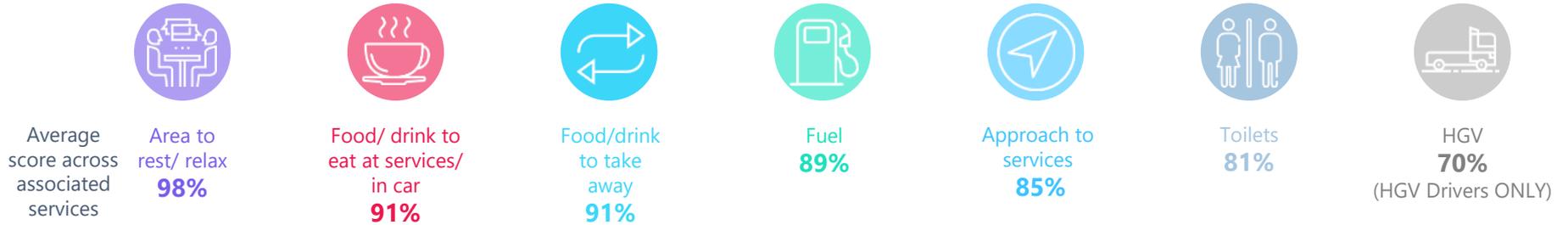
Security and safety: especially at night more lighting is needed at the A34 services, more staff at night would help combat this.

The customer journey

Impressions of facilities

Overview of aspects rated in the quantitative research

By calculating the average level of satisfaction across several related aspects of the services offered, an overall score was derived for different elements. On average those aspects associated with the provision for HGV drivers and toilet facilities are rated lower than others.



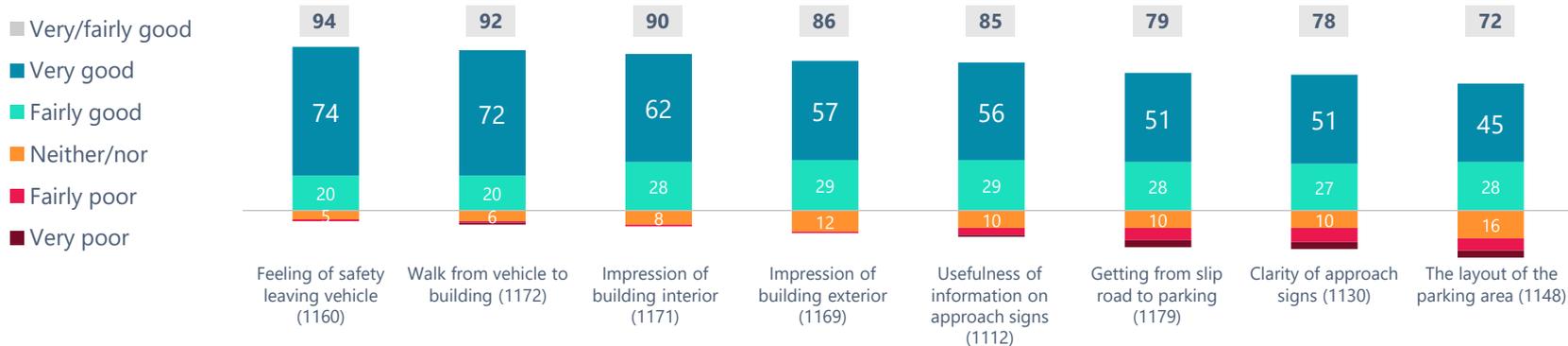
Areas for improvement					
Value for money	Value for money	Value for money	Layout of parking area	Quality of décor	Facilities to relax
Range of food/drink			Clarity of approach signs	Cleanliness	Number of parking spaces
				Number available	Size of parking spaces

Q11. Thinking about your arrival at these services today, please rate the following... Base: all giving an opinion
 Q13. You said that you [used a facility]. Please rate the following... Base: all using facility and giving an opinion

Approach to / arriving at the services



"You think am I going this way or that way? You can tell there had been signs on the road about a hundred years ago, that have never been repainted. It's been neglected. Poor signage."



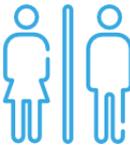
"As a woman driving around on my own I would always avoid using a service station at night... I would feel vulnerable standing outside there on my own at night."

"At some of the larger ones you really lose your way...I've ended up driving into the space for lorries, or driving around a roundabout a couple of times!"

"You sometimes have to walk across the petrol station forecourt to get to the shop, which doesn't feel particularly safe. Especially when I've got my kids with me."

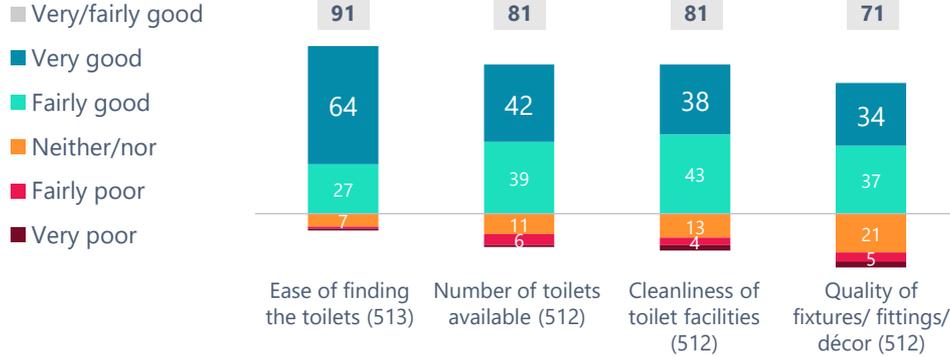


*MSUS asked only about "approach signs" as a whole Q11. Thinking about your arrival at these services today, please rate the following... Base: all giving an answer (in brackets above)



Toilet facilities

Attributes rated in the quantitative survey show room for improvement in the general quality/décor, the level of cleanliness and the number of toilets available



"Milton Interchange is similar to Tot Hill where there's **not a dedicated toilet**..."

"Can't say that I've found one that's not acceptable. Replenishing toilet rolls, soap, cleaning etc. with basic maintenance..."

"I'd look for one with a **McDonald's**, because I'd use the one in there. Because I know it'll be clean and I don't need to get a key or anything like that."

"Tot Hill is just a garage and McDonald's and was a Little Chef, and is Starbucks now I think. But there isn't actually a toilet unless you go into McDonald's. And that's when you start to feel like it's a bit of a **money spinning exercise** rather than a service. If you're a services then just let me go to the toilet."

"Personally I think **all services should provide a toilet** at least where you don't need to buy anything. Without feeling awkward that you've gone into McDonald's and snuck in because everyone needs to go."

Q13. You said that you used the toilets today. Please rate each of the following...
Base: all using the toilet facilities and giving an opinion (in brackets above)

Attitudes towards toilets

From the qualitative interviews – what is important?



Importance of cleanliness

- Of greatest importance is that toilets are clean
- Often acts as a barometer for perceptions of cleanliness of the services as a whole
- Sticks in the mind; can cause people to avoid in future

"Toilets that's the main thing..just checking where has got clean toilets. So you kind of know which ones [services] to avoid."

"When you've gotta run around looking for a key and when you get in there's no toilet paper."

Ability to find the toilets

- For some it's not clear where toilets are
- Others have no problems
- Much more difficult in comparison to Motorway Services
- Preference for a dedicated block, even at smaller locations

"Toilets you can actually use without having to ask for a key and they are actually clean."

Ease of access

- Without the need to ask staff for a key
- Some are frustrated that you sometimes need to seek out a key. Even if this isn't the case in reality, the perception is that it's required at smaller services

"That would be the first thing that I'd use if I was stopping - if it was dirty, that would probably put me off any hot food...it gives you an idea of the standard."

Enough cubicles

- Speed is important – people don't want to wait around in a queue, and the expectation is that they should not have to
- Some men mention that urinals should be fitted to cut down on queues
- Some women mention that urinals should be fitted to prevent men from using the female toilet

"A thing that would put me off if I go into a service station that's not got very clean toilets, it would make me think twice about going there again...The other day the toilets were round the back of the garage. It wasn't a proper services and it was dreadful and I thought I better not stop there again."

Free to use

- Only an issue for a handful of people, but some were unsure about whether a purchase was necessary to use the toilets.
- Some uncertainty of there being no free toilet at all, and having to go to a McDonald's or similar

"Just go to the McDonald's. There will be one there."

Food and drink

Price and variety both came across strongly in the qualitative interviews



Price

- Price and value of food and drink was inevitably mentioned a lot in the qualitative interviews. The common perception for the **majority** of respondents is that A Road Services are **expensive**
- Many feel like a **captive audience** and that services and outlets **take advantage** of consumers who have little choice
- Prices are seen as on the **same level as Motorway** services, but for often poorer quality and selection

"I think they're too **expensive** so I just take sandwiches."

"Water is like £1.70 or something."

"It's the cost with me, a meal deal with Marks and Spencer's is £5..."

"I just get annoyed that M&S **hike their prices** at these places."

Variety

- Variety of food and drink was also mentioned by the **majority** of respondents
- For some the lack of variety is irrelevant as they would not purchase food and drink (for a variety of reasons, including the high cost)
- Most would at least like to have the option
- Additional options often included a desire for:
 - More **coffee** shops
 - **Healthier** options
 - More **fast food** options (for some)
 - Better provision of **hot food sit-down** meals (for some)
 - Breakfasts (for some)

"The variety has got a lot better, don't get me wrong, but there are some of the smaller places where you just have **no options** a lot of the time ..."

"I have a child who is **allergic** to wheat and dairy. I know that there is nothing they can eat in Greggs. Burger King is ok if I can persuade them that we don't need the bun. Costa I can't get him anything to eat but I can get him a drink... I know whether it is worth pulling over or not."

Both price and variety feed into some users avoiding food and drink purchases altogether. For most users it is about **having the option**

"Back in the day there were those places where you could get a breakfast, **Little Chef**. And they were perfect. You knew you could go there and get a bloody good breakfast. Not a McMuffin or whatever. And you could have tea and coffee and have a **sit down**. It was great."



Getting food/drinks to eat in the services or at car

Value for money is considered poor when purchasing food and drink at 'A' Road Services. As is a general lack of variety and choice

- Very/fairly good
- Very good
- Fairly good
- Neither/nor
- Fairly poor
- Very poor



% very/fairly good by user group

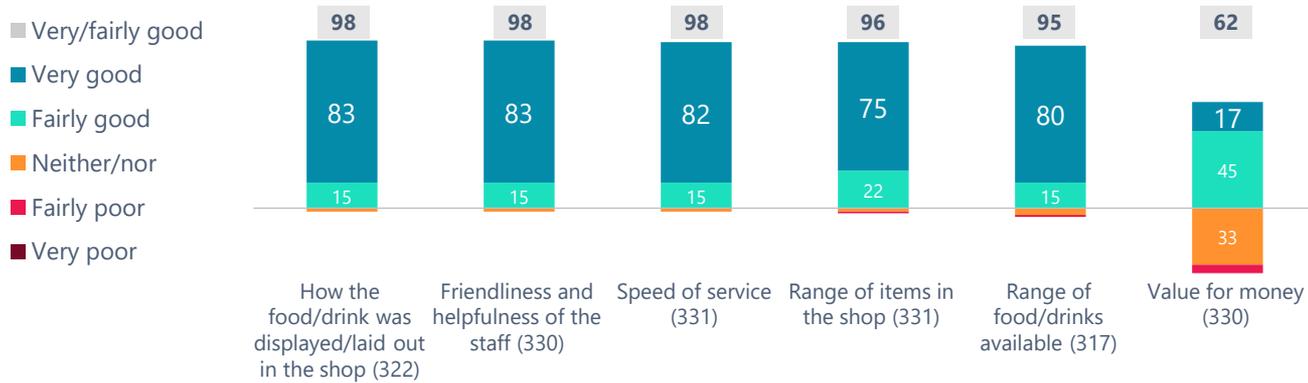
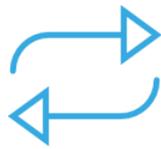
Drive for a living	81
Commute	94
Business	88
Leisure	90
16-34	86
35-54	91
55+	87

% very/fairly good by user group

Drive for a living	85
Commute	85
Business	72
Leisure	69
16-34	69
35-54	76
55+	72

Q13. You said that you bought food/drinks to eat in the services or at your car. Please rate each of the following...
 Base: all buying food/drinks to eat at services or have at car and giving an opinion (in brackets above)

Getting food, grocery or convenience items to take away



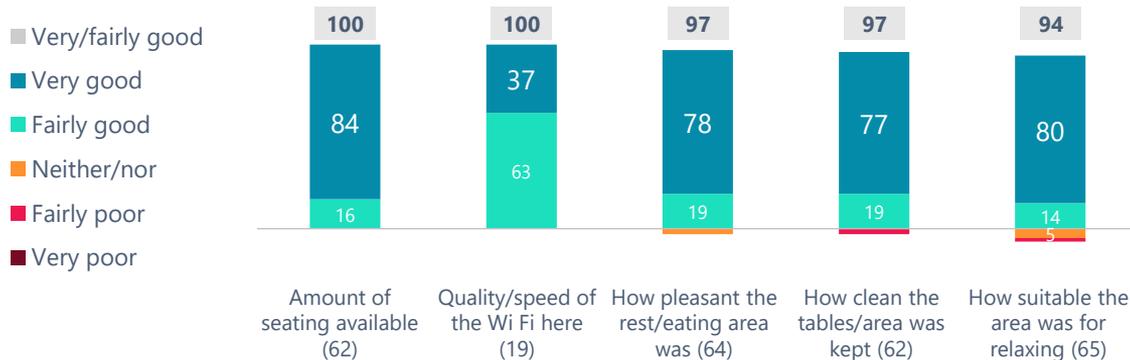
"Those American style ones where you don't even leave the car...perfect!"

"Maybe if you were coming from work and were passing and there was a Waitrose or M&S where you can buy meals or milk and bread on the way home. It saves you having to pull into a big hypermarket or something...."

*"...with people who are now leading exceedingly **healthy** lifestyles or different lifestyles, you need to be able to **cater for a lot of needs** so variety is definitely important..."*

Q13. You said that you got food, grocery or convenience items to take away. Please rate each of the following...
 Base: all who got food, grocery or convenience items to take away and gave an opinion (in brackets above)

Area to rest/relax



"If I do a long journey then I like to be able to stop and take some time out but you can't really do that on the A34. **There's nowhere to just sit...**"

"If you're going on a long trip or a holiday you might make a bit more of an experience, say you were going down to Cornwall again. You might wanna stop off and just chill and make it more pleasurable I guess and if you think about families that's something you should consider because there aren't many safe places to sit outside with the children. I've sat in the car lots of the time, if I'm not buying any fast food you just go back with your coffee and just sit inside there."

"The A34 is actually a really nice road to drive down. It's really green and goes through a lovely part of the countryside. I don't feel that services take advantage of it...you could have **benches outside to sit**, that's away from the road and overlooking some green space. Other countries do this much better than us."

"More of a seating area where you can sit in there, there's none of that...not the ones I've been at anyway. If you're gonna go and have a coffee and have a break."

"Why would you want to do that?" [Sit down and relax at an A Road Services]."

"Big motorways have made a big thing of it a play area outside, everything you can think of."

"[Winchester Services] has a fountain outside and it and you can sit out and it's nice water...on a sunny day that's really nice."

"I wouldn't say there's much comfort. Most of them are fast food restaurants...The outside bits don't seem to be comfortable, the benches don't even have backs on them sometimes, that's what I mean...I don't really expect that. I'm not looking out for maximum comfort."

Q13. You said that you sat down for a rest/had your own food/drinks. Please rate each of the following...
Base: all sitting for a rest/having own food/drinks and giving an opinion (in brackets above)

Buying fuel



- Very/fairly good
- Very good
- Fairly good
- Neither/nor
- Fairly poor
- Very poor



*"I'd **only put a tenner** in at a service station because it is so many pence more per litre...it makes a difference."*

"Unless I absolutely have to, but that's really rare. And I'd only put a tenner in just to get you to Tesco."

*"Fuel at service stations is a **rip off**. I never go to them."*

*"Really, really rare that I'd fill up at services. Occasionally I might get **caught short**, like if I've just been on holiday or something. Those kind of dire situations."*

*"They're **expensive**. **Absolute rip off!** Worse than the motorway. That's how I feel about it."*

*"Instead of having a fuel sign it should have what fuel, Shell, Esso, BP etc...I know if I go there I can get my BP fuel on my **BP card**."*

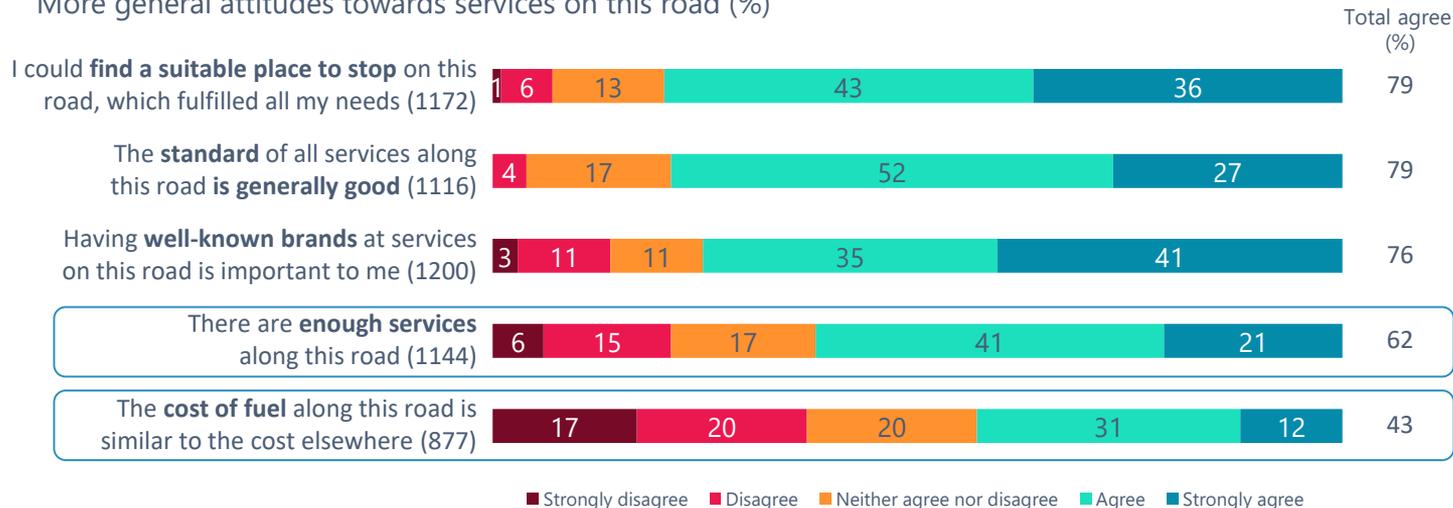
"When I do stop on the A3 I'm always annoyed with myself...it's expensive to fill up and the difference is quite substantial when you're filling up at a service station compared to where I would normally go at Sainsbury's."

Q13. You said that you bought fuel. Please rate each of the following...
Base: all buying fuel and giving an opinion (in brackets above)

General attitudes towards services on this road

The cost of fuel compared to elsewhere and there being enough services are identified as areas for improvement

More general attitudes towards services on this road (%)

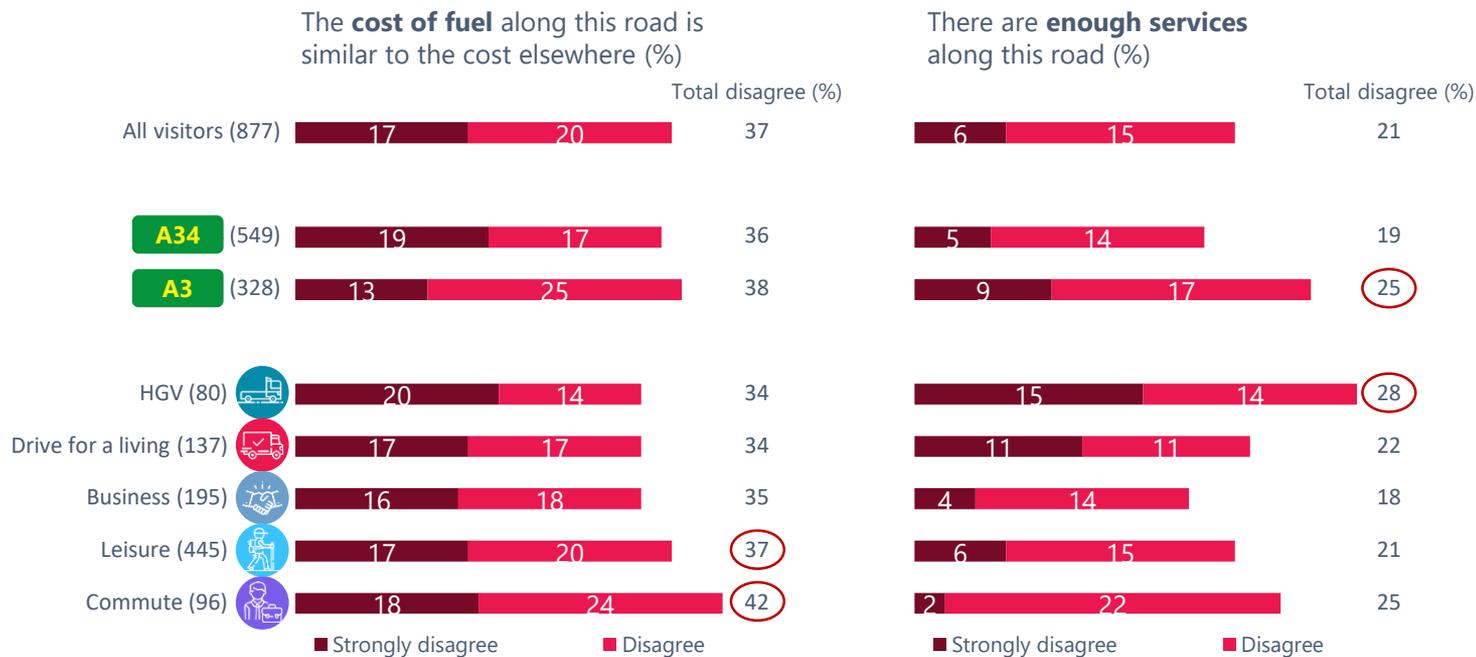


Q18. Where on the scale best represents your view on the following? Base: all giving an opinion (in brackets above)

General attitudes towards services on this road: fuel cost and enough services

Those travelling on leisure and commuters are the most sensitive to fuel prices being higher at 'A' Road services.

When it comes to there being enough services along the road, the A3 is perceived as the worst, and HGV drivers are most likely to think there are not enough

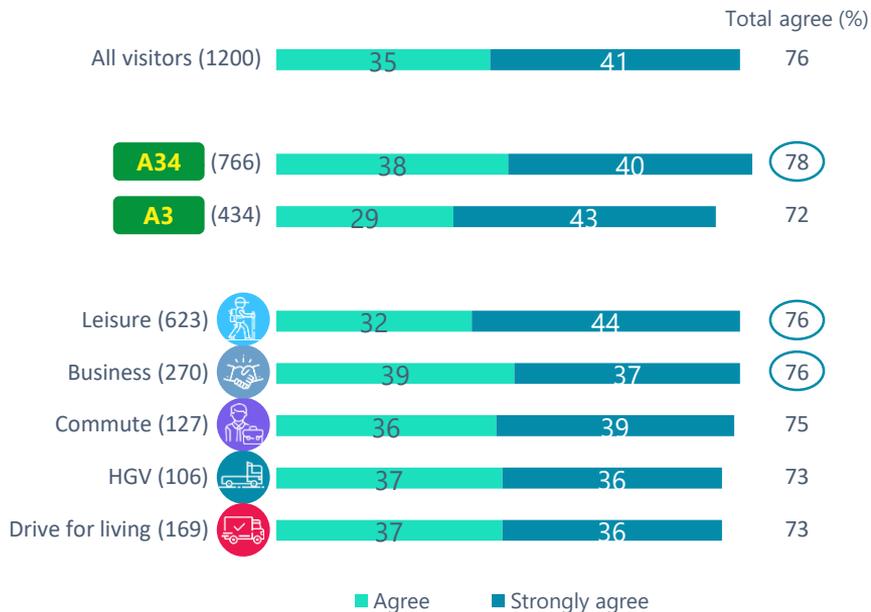


Q18. Where on the scale best represents your view on the following? Base: all giving an opinion (in brackets above)

General attitudes towards services on this road: well known brands

Having well known brands at 'A' Road Services is more important to users on the A34, as well as leisure and business travellers

Having **well-known brands** at services on this road is important to me (%)



“ There is a need for more **variety** in the food type ”

“ I would suggest this site is converted into an expanded services with **a proper food court** to accommodate more **dining choices** ”

“ **More food outlets** would make a difference. McDonald's, Burger King, Greggs ”

“ Wider **range of food** to go **like the motorway services** ”

“ Couldn't get **fresh fruit** Quantitative survey ”

“ Widen range to include **hot food**. Introduce a **drive through** ”

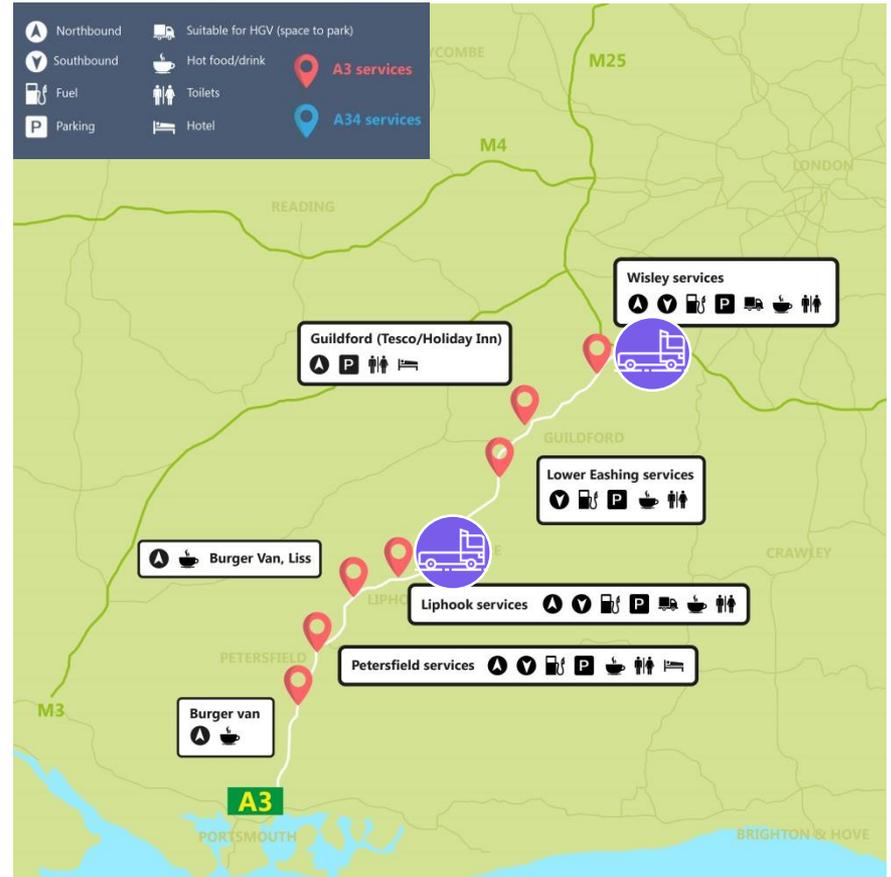
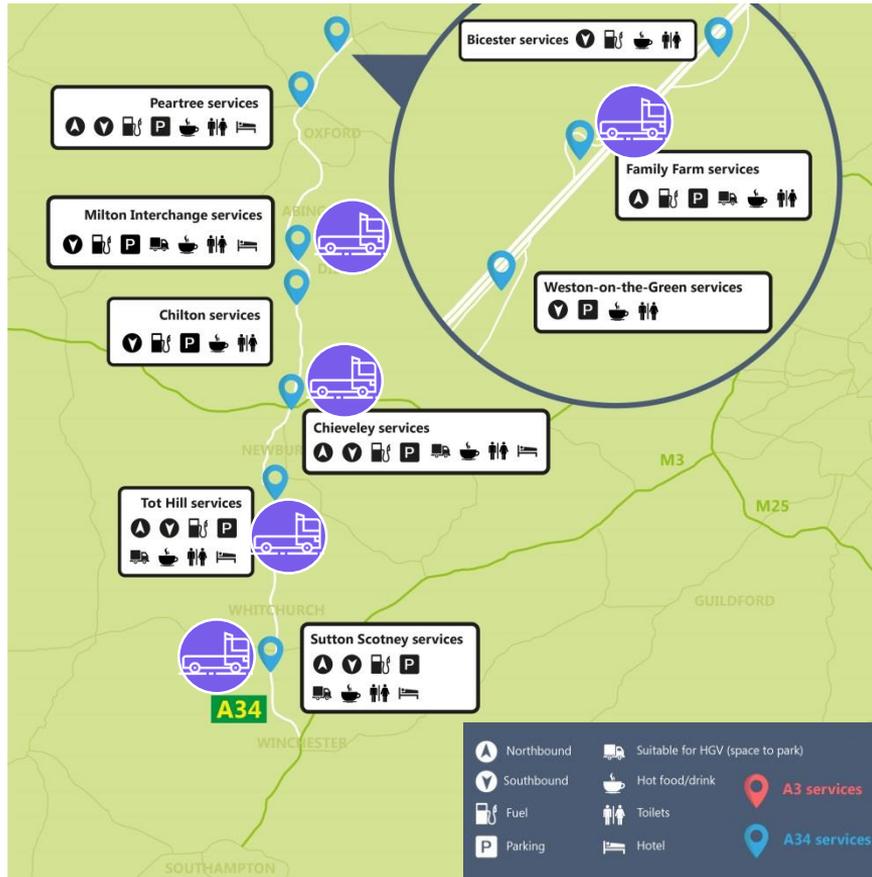
“ Can we have a **KFC** and **Harry Ramsden?** ”

“ Would like **more choice** of food. Somewhere to sit in **M&S cafe** would be nice. Provide picnic benches on central lawn ”

Q18. Where on the scale best represents your view on the following? Base: all giving an opinion (in brackets above)

Focus on HGV drivers

What is available for HGV drivers?



HGV drivers: general perceptions



A Road Services are not set up for their needs

A Road Services do their job, but are not particularly good

- They serve a basic need of filling up fuel, buying food/drink or going to the toilet
- But 'A' Road Services are **not particularly easy to use** for HGV drivers

Lack of services suitable for HGVs

- A particular issue on the **A3**, but also commonly mentioned for users of the A34
- Some less experienced drivers uncomfortable with **smaller services** which are technically suitable for HGVs, but which are actually quite **difficult to get into**
- Further restrictions if their employer can **only use a certain fuel brand**

Not set up for HGVs

- Most HGV drivers are very **familiar** with 'A' Roads and motorways and are making **longer journeys**. Inevitably there are frequent **comparisons to Motorway** Services where provision is seen as far better
- **Access** can be poor
- Lack of space available for **parking** a large vehicle
- Many drivers prefer to use a layby if just need to take a break
- Lack facilities which are **specific to HGVs**

Value for money

- Similar to other users, value is seen as poor
- Both **food/drinks** and **fuel**
- Some drivers will buy food and drink regardless but feel aggrieved
- Others avoid purchasing, either buying food before their journey or making their own

*"If they're really busy, in the past I've had to come off the main road and park up on a muddy verge along a country lane. Some places you end up don't feel safe, and I've had issues in the past where I've been in the way...you feel bad but at the end of the day **you need to stop and there's nowhere else.**"*

*"It's not like on the Motorway where you get a whole section for parking up. **Sometimes there's only space by the pump, and you end up getting in the way.** But there's nowhere else to park."*

*"There's **nowhere to park** in most of these places. If you need fuel you fill up, then go find a layby."*

*"It's really **expensive**...I'll bring my own food and eat in the cab."*

HGV drivers

What kind of stops do they make?



**9%
HGV drivers**

(a subset of the professional drivers)



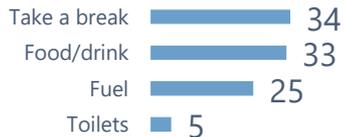
Average journey length
(median hours)

6.8

Making the
longest journeys



Reason for stopping



Planning in
advance

Planned
Spontaneous



Age

The **oldest group**:
30% 55+ and 58% 35-54

"I take a break every four and a half hours – it's a **statutory requirement**. I don't take any more breaks than I have to as once I've finished my deliveries I'm done for the day."

"I used the services at Didcot [Milton Interchange, A34] to fill up and get a sandwich. There's a decent range of food and healthy options there."

"I'll only stop off if I need **petrol** or to take a **tacho break**. If it's just to take a break then I'll often use a layby."

A lot of stops are made out of necessity: tacho breaks or refuelling

Planning was commonplace in the qualitative interviews for a number of reasons: perception of poor provision for HGVs, stops being forced and fuel restrictions

"**You have to plan for these roads**. I had to learn a lot from one of the other drivers. I had a kind of training where I went along with him to learn the roads, where are good places to stop, that kind of thing. You pick up tips, and learn from what other drivers are saying."

"My route is all planned for me by sat nav, although I tend to view that mainly as just a guide. And I'll **plan my breaks** along the whole route **because I have to take breaks**."

"My company has a **BP [fuel] card** so I can only fill up at those petrol stations. So I've got **no choice but to plan ahead**."

"I **never do any planning**. I'm given my destination by my boss, often it's the same places that I'm delivering to. I always pick up from our depot and then come back to roughly the same area, so I **know the route really well and all the stops**."

Overview of facilities – HGV users



HGV users are generally positive about the services available. Like other types of road users, the rating of toilets and the approach to services are slightly lower. However, HGV users rate the facilities which are specifically designed for them considerably lower than other commonly used aspects.



Approach to services
88%



Food/ drink to eat at services/ in car
93%



Food/drink to take away
97%*



Fuel
96%



Toilets
87%



Area to rest/ relax
97%*



HGV
70%

All visitors: 85

91

91

89

81

98

n/a

Areas for improvement

Layout of parking area

Value for money

Value for money

Number of toilets available

Facilities to relax

Getting from slip road to parking

Number of parking spaces

Size of parking spaces

*CAUTION: low base (under 30)

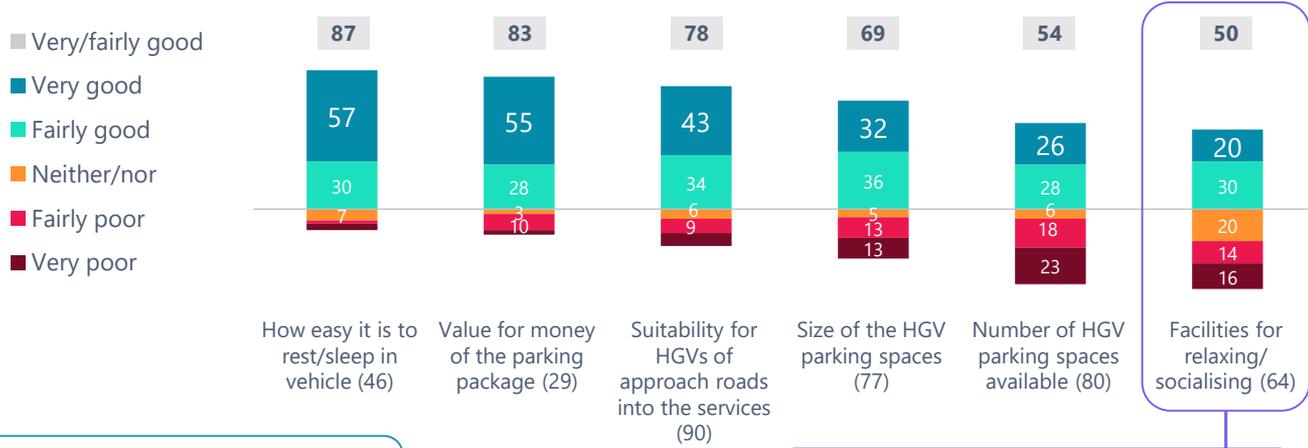
Q11. Thinking about your arrival at these services today, please rate the following... Base: all giving an opinion

Q13. You said that you [used a facility]. Please rate the following... Base: all using facility and giving an opinion



HGV- specific facilities

Space to relax or socialise is rated the lowest of all HGV facilities. Most don't expect to find these facilities at 'A' Road Services but it is certainly a nice to have, especially when taking a tacho break or buying food



"Personally I wouldn't use it anyway. I'd only stop there for fuel so it's not about taking a break...if I'm taking a break I'll stop at a layby or if I need food I'd go somewhere serving a hot meal like a Little Chef type thing."

"I don't think I'd use it if it were there."

"Well there isn't anywhere you can sit down - I always go back to my cab and sit in there which is not ideal."

"It'd be great if they had some kind of area to just sit and relax. But to be honest I don't expect it with these services...mainly just a petrol station."

Some mention a **distinct lack of anywhere to sit/relax** at A Road Services. If it were available they'd **like to have the option** rather than having to sit in their lorry during a break

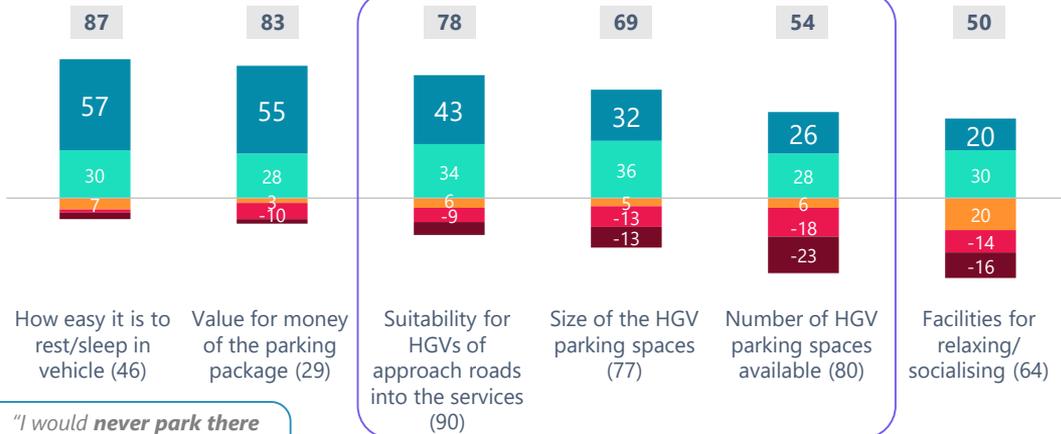
Others **don't feel they'd use these areas** unless it was for a sit down meal. Some are **only stopping for fuel** and don't want anywhere to sit - longer breaks are taken elsewhere, where facilities are better

Q13. You said that you are travelling in an HGV. Please rate each of the following...
Base: all travelling in an HGV and giving an opinion (in brackets above)

HGV-specific facilities



- Very/fairly good
- Very good
- Fairly good
- Neither/nor
- Fairly poor
- Very poor



*"If I need to have a tacho break the often I have to use a layby, where there's only really space for 2, maybe 3 lorries. At services getting fuel is normally fine and easy enough. But **parking up can be a real problem due to lack of space.**"*

*"When you do manage to find somewhere, the **distance between the HGV parking and the services is too big. You waste half of your break traipsing around.** I'd rather save my break time by bringing my own food along so I don't need to walk back and forth."*

*"Sometimes you're **forced to pull up on the forecourt,** which is possible but the staff don't really like it."*

*"I would **never park there overnight.** There's not enough **space** and the **security** is non-existent."*

*"You get **cars parking in the lorry bays,** which is pretty common and extremely frustrating. The sign saying it's for lorries is old and worn out...If I really can't park up then I've normally allowed enough time that I can carry on and pull over somewhere else."*

Lack of space, causes

- Cars parking in HGV spaces
- Use of laybys
- Parking up on forecourt

Space also inhibits manoeuvrability, both for entering the services themselves and parking in tight spaces

Non-existent security

Parking is too far from services – wastes valuable break time

"Even at the bigger services [on the A34] there's not enough space for large vehicles. You go use the facilities then move off and park in a layby."

Q13. You said that you are travelling in an HGV. Please rate each of the following...
Base: all travelling in an HGV and giving an opinion (in brackets above)

Message to managers...HGV drivers



Message to managers, coded into themes (%)



“ **No rest facilities** available here ”

“ **More parking for HGV** vehicles for a longer rest period ”

“ **More HGV only spaces to park**, sometimes I have to leave here and find somewhere else as no parking spaces for HGV ”

“ Get rid of HGV fuel pumps to make provision for **parking bays** ”

“ **The HGV parking** is like a DVLA test ”

“ **Slip road** needs to be longer for coaches and HGV ”

“ It's **not designed to accommodate the needs of HGV drivers** which is a bit understandable given that this is an A road ”

Q15. What would you like to tell those who run this service station? This could be something you liked or disliked, something that could be improved or something that you wanted but couldn't find.
Base: all HGV drivers giving an opinion (51)

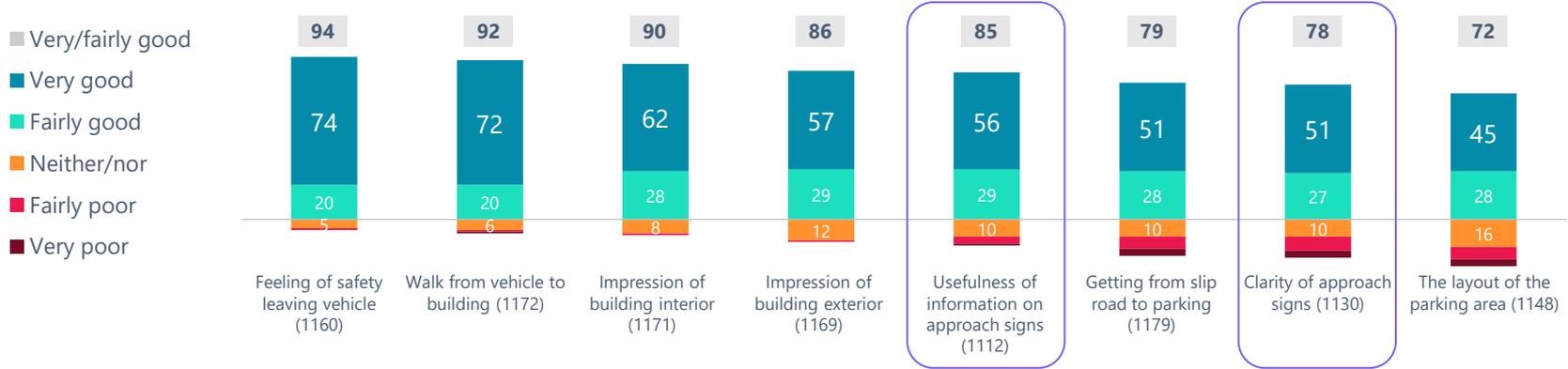


Focus on signage



Approach to / arriving at the services

One of the main areas of approaching 'A' road services which is lacking is the clarity of approach signs



"At some of the larger ones you really lose your way...I've ended up driving into the space for lorries, or driving around a roundabout a couple of times!"

"You think am I going this way or that way? You can tell there had been signs on the road about a hundred years ago, that have never been repainted. It's been neglected. Poor signage."

Q11. Thinking about your arrival at these services today, please rate the following... Base: all giving an answer (in brackets above)

Signage on the road

Response to signage stimulus



Examples from 'A' Roads



Examples from Motorways



Black on white signs

Does the job but could have more information and better warning



- Very little knowledge that **black on white** used on 'A' Roads. Most expected them to be white on green
- **Icons** considerably better than text (e.g. signs saying "Welcome Break KFC")
- For some, **icons** for food/drink **don't give enough information**:
 - "What exactly does a spoon and fork mean?"
 - Logos give extra information, e.g. if avoiding fast food, or looking for vegetarian options
- Half a mile is **not enough warning** – would expect a sign or two before this, but general impression is that warning is not sufficient on A34 / A3
- Some respondents assume that these signs indicate a services with less choice, worse facilities, and might therefore avoid it

*"I'm not often stopping for food but it would be helpful for me to **have the logos** because I don't eat meat. And then you know what you're going to get."*

*"Does it even have that on the A34? It just says services. Like it'll say Tot Hill services this way. There's not an indication of what's actually there. It'll have a **knife and fork**, but there's no BK, M&S or whatever else."*

*"What's the **difference between a coffee cup and a knife and fork**? Like a Costa sells sandwiches, so which one is that? What makes it just a coffee cup versus something that sells food?"*

"No HGV is a bit of a slap in the face. There's not enough places on these roads, and what am I supposed to do when I need to toilet?!"

"I wouldn't assume there'd be a good selection with those ones [the white background]. If it was the blue ones then yes you assume a choice and that it's bigger. Because that's what I identify with being a service 'area' rather than just a petrol station kind of thing."

Motorway signs with logos

Clearer, more comprehensive



- Much better and **preferred by the vast majority**
- More **colourful**
- **Logos** indicate exactly what is available
- Quick to take in the information with **a glance**
- **Warning needs to be earlier** than half a mile, but most assume this sign would be combined with others
- A couple of people raised the point that if they saw a blue sign with logos for an 'A' Road services they'd be **disappointed** when they turned up

"That's the one I'd be looking for [with all the logos]. It tells you everything."

*"If I saw a blue sign for a smaller place with just a petrol station and then turned up, I'd be **disappointed** with it! I'd expect more."*

*"On the A34 you'll never have one with all of these logos because they're quite small. But I still like the fact that you've got **logos** and a bit of **colour** because it's easy to see what's there and what type of services it's going to be. It's **more visual**, it's much better, but you'd never have that much variety on the A34 other than at Chieveley."*

*"These blue ones with the logos are just much better. You can glance at it and **very quickly take in all the information** without having to read everything."*

Motorway advance planning signs

Missing on A Roads



- **Missing from 'A' Roads generally**
- The biggest improvement mentioned by respondents: these signs should be available (on the A34 in particular) as they enable **planning ahead**
- Especially important when there's a difference in the size/variety of services along the road – e.g. on the A34 it's useful to know how far Chieveley is
- Should indicate approximate size in order to make an informed decision and plan ahead
- Deemed necessary from a safety perspective

*"If you're with someone else it's nice **have a dialogue about where you're going to stop**. And to have that conversation well in advance. So you can say we could either stop here or at the one in 25 miles. Before you've actually gone past the one that's closest, because it's too late, you've missed it now, and if you needed to pee then it's too late!"*

*"I don't think so [there's not much telling you what services are available]. **They just come up on you** don't they? "*

"I like it where you know how far you've gotta travel. Oh yes definitely. And I think it's good to have the closest place, and then the next one...Yes on the A34."

*"A lot of them it just says services, tells you a couple of miles back, and it doesn't seem to give you enough detail...**not enough warning**, and not a big enough sign sometimes."*

"You know those signs where it tells you how far away the services are...like services 3 miles, services 23 miles. I don't remember seeing any of those along the A34. There's one right at the very top when you're ready to go onto the M40, but that's for services on the M40. But I don't recall any on the A34 saying there's a services 3 miles ahead or whatever."



Signage: recommendations

How can signage for services on 'A' Roads be improved?

More advance warning

- More signs **when approaching** services
- **At least one mile before**, ideally more warning than this
- A **series of signs** as you get closer
- Prevents people getting stuck in the wrong lane – **safety** issue. Particular concern due to large number of HGVs on the roads
- Needed on both the A3 and A34



Better icons / information

- Icons can be **ambiguous**
- Preference for **logos** giving more precise information and a bit of colour – aids quick recognition
- Would be useful to always have **opening times** – can't assume services will be open 24 hours on A Roads



Advance planning signs

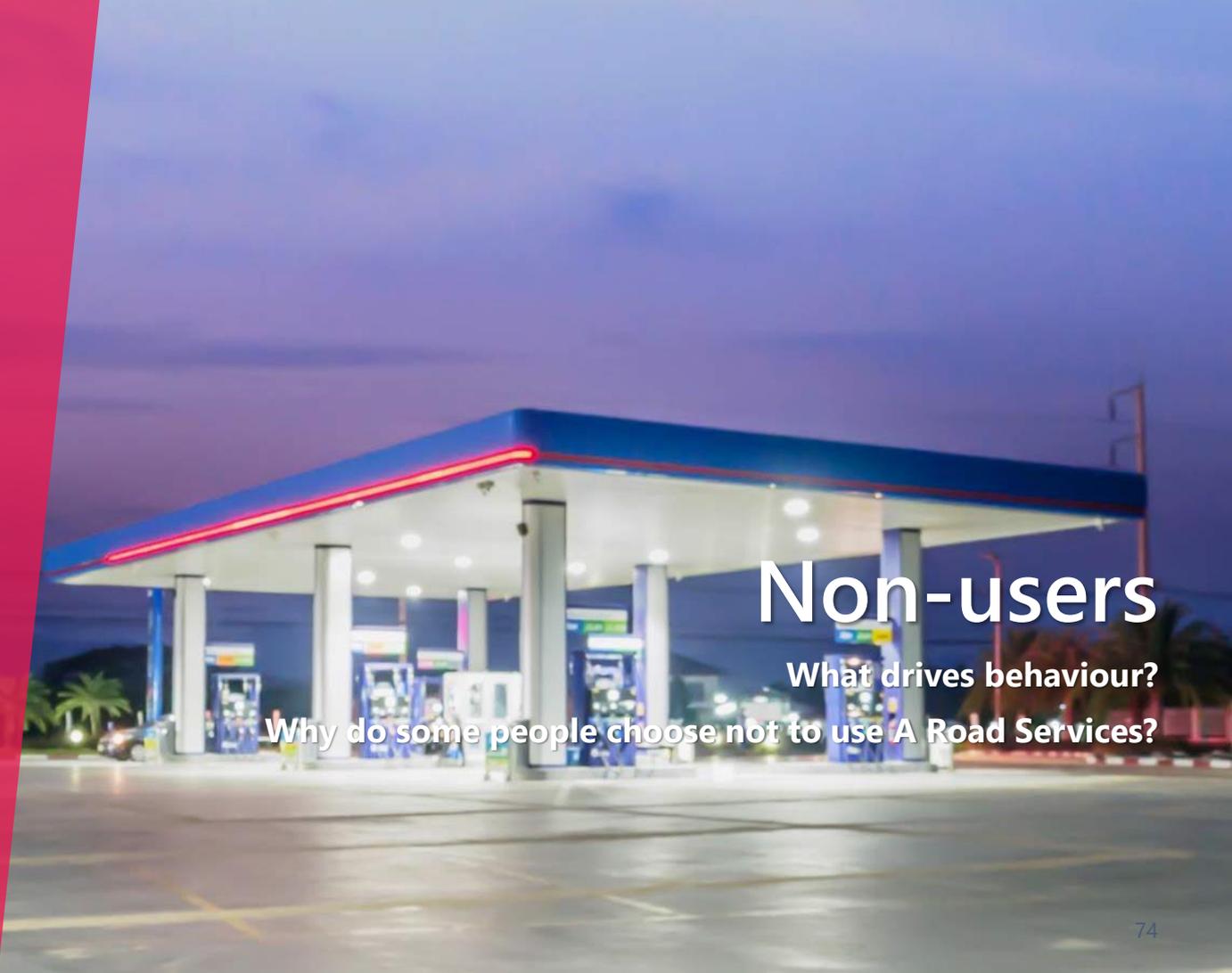
- Seen as completely **lacking** on A3 and A34
- Enables **informed decision** on where to stop
- Should indicate approximate size to help make a decision
- Also seen as a **safety** issue to avoid being stuck in the wrong lane



*"I don't think half a mile is far enough. Or even three quarters of a mile. I think a **couple of miles is sensible**. Because thinking about if you're overtaking a lorry and then you've missed that sign because it's blocking the sign, then you've got basically no warning at all which can be quite dangerous."*

*"It doesn't give you much...you're **not sure what's going to be there**."*

"More of these signs [with the distance to the next couple of services], and then definitely 2 miles notice, then 1 mile, then maybe half a mile."



Non-users

What drives behaviour?

Why do some people choose not to use A Road Services?

What drives non-usage?

Summary: the main reasons why people do not use 'A' Road Services

1



Perceptions /
experience of
what's on offer

2



Better
alternatives

3



Value for
money

4



HGV specific

What drives non-usage?

Perceptions / experience of what's on offer



Emotional aspect

A Road services generally viewed as:

Grubby

Not a nice
place to
spend time

Run
down

Need
updating

Run of
the mill

Just fine

Unclean

Depressing

"They're just old. And small. It seems like no-one takes care of them."

Non-user, A3

"Well they're just much smaller than the ones on the motorways. Even if you're on the A34 which is a big road, they're small."

Non-user, A3

Rational offering

Many are put off by a perceived **lack of facilities** at 'A' Road Services:

- Expectation is that the offering will be **very limited** (possibly linked to signage not giving enough information)
- A lot assume that it'll be **just a petrol station** when travelling on A Roads
- Certainly **worse than Motorway** services
- Possibly **not open** when needed

"A lot of them are just petrol stations, which is fine if you want to pay too much for petrol. But if you want something nice to eat you're a bit stuck."

Non-user, A3

What drives non-usage?

Better alternatives



Quite a few mentions of **holding out** for Motorway Services (including Chieveley when travelling on the A34) for:

- Better choice of food/drink
- Healthier options
- Nicer / larger toilets without the need to purchase
- Nicer environment / ambiance

"I prefer the larger ones with a central hub that's got everything in it. With a dedicated toilet and a couple of places to eat, and a whole frontage. And the petrol station/garage is normally separate."

Leisure, A34

Some will make a detour into **local towns** or large **supermarkets**. Normally informed by local knowledge, travelling very frequently so knowing the best spots, or sometimes based on Google maps search

Applies to those who are **able to wait** or **plan ahead** for an alternative

"Me and my guys must know every little transport café from here up to Scotland because that's where you get the good value food when you're on the road. The quality as well is much better...Like there's a place down near the M23 where there's a transport café packed out with lorries all the time, and you just know that's going to be a good place to stop."

Business traveller, A3

What drives non-usage?

Value for money



Fuel

- Perceptions among road users are that **value for money of petrol is very poor**, which plays a big part for some non-users
- Particularly those **travelling regularly** (commuters or professional drivers) or leisure users who are more price sensitive and are able to fill up elsewhere
- Many non-users are **not willing to put up with higher prices**, and will find alternatives to get better value: fill up before joining a large road, find a nearby supermarket
- Using services for petrol would be a **last resort only**



"I never use services...the petrol price would put me out of business."

Motorbike courier, non-user, A3

"I don't really know how much it costs exactly, but it is definitely more. There's a Tesco near me so I just fill up there before getting on the A34."

Leisure, non-user, A34

Food and drink

- Perceptions among road users are that food and drink is **excessively expensive**
- Plenty of respondents feel like a **captive audience**, and that services / brands will take advantage of the fact that you have limited options
- A few comments that prices are higher than the same product on the highstreet
- More of an issue for those **travelling with a family**
- Some will **divert to a supermarket or town**
- Others will **bring their own** food/drinks



"It's way overpriced for what it is. You'll get a dodgy sandwich for more than you'd pay for a nice one on the high-street...If you need food for the whole family you'd spend a fortune! And as soon as the kids see a McDonald's you've had it."

Leisure, non-user, A34

Case study

Pretty regular leisure traveller, avoiding services if possible



Stella

Regular leisure traveller

Always travelling with one other person

A34

Avoids services if at all possible

59 years old

Type of journey

I travel **on the A34 several times a month.**

Usually I travel with my husband but also my daughter and my sister.

We regularly go up to the NEC in Birmingham to watch a show or see an exhibition. But I also go to Bicester Village. More recently I had to visit a specialist vet a few times for our dog with my daughter which takes me onto the A34.

I know the road very well, having travelled on it for a number of years, **so I don't plan, just use the sat nav for traffic, road works and cameras.**

"It would not be my choice to use them [service areas]. They have a dirty feel about them. There are so many people going through them each day. When using the toilet you don't have any peace."

"We have got far too much into this thing with chains. Everyone has become so greedy. I'm really not interested in them. I really like independent cafs that are a bit different and offer fresh food and not a huge selection of different coffees. We don't need that."

Not using services

I **avoid services if I can**, only use them in an emergency if I need the loo but even then I try not to.

I **don't like the feel of a service station, it's got a dirty feel to it.** It's just not for me. There are so many people going through it – you have got no peace using the toilet. It is also **more expensive** – why is that?

I usually pack a **packed lunch** or fill up a thermos with hot porridge and some compôte on top. I could not imagine anything worse than a McDonald's breakfast.

Ideal service station

I'm really **not interested in chains.** The food comes out of a pack and it all tastes the same.

I **really like independent shops and cafs.** The ideal service station I imagine a bit like a **co-operative type thing** where it does not cost people an arm and a leg to sell stuff. Everyone would put their wares out. **The food is freshly made** but quick, like a jacket potato or home-made scones or fresh toast. There can be craft stands too, People sell what they are proud of making, **a bit like a craft village, quite relaxed.**

The seating would be airy with big windows and some greenery inside. There would be areas for children where families clear up after themselves. But also **child free areas** for those who want that.

What drives non-usage?

HGV drivers



Lack of services suitable for HGVs

- For many it's a simple case that there are **not enough services** along the road to be able to rely upon. They will therefore plan their stops to be elsewhere – either on the Motorway, at company depot etc.
- Some employers will have a **fuel card** specific to a fuel provider. This restricts the services at which they can stop, e.g. they must fill up at a BP petrol station

"Getting fuel is normally fine and easy enough, but parking up can be a real problem because there's not enough space."

HGV, A34

Inadequate parking

- Some services **do not have dedicated HGV parking**. If you stop there other than to fill up with petrol, you get in the way
- Even if dedicated parking, there are **not enough spaces** and it can fill up quickly

Not set up for HGVs

- **Access roads** can be too **narrow / awkward** to get into. The cause of concern for a few drivers, especially if less familiar with the road
- No dedicated facilities means that **using a layby is just as good**

"There are loads of laybys to compensate for a general lack of services that are suitable for HGVs."

HGV, A34

Value for money

- Of both **food/drinks** and **fuel**
- Even when being reimbursed by their employer for fuel (and sometimes for meals), most are conscious of the amount they are spending and want to keep good faith with their employer

"If a lorry is there [at the services] already then you've had it..."

HGV, A3

Getting in the way

- Some were very wary of other drivers (both HGV and other vehicles) and worried about their **vehicle being a nuisance**
- When **filling up fuel** and causing queues. Or **parking up** and causing annoyance
- Particularly the case for less experienced/confident HGV drivers

"Truckstops are just better. You'll get a home cooked meal, often a roast or something like that, rather than just fast food. And it's healthier which is important when you do a lot of overnights...Motorway services might have one shower cubicle, but a truckstop will have a wash-house...parking is organised, with patrolling security...it's organised – Services are a free-for-all."

HGV, A3 and A34

Overnight stays

- Planned carefully to avoid A Road services, with a preference for **truckstops** or **Motorway services** which are known to be good
- Truckstops provide: personal touch, home cooked food, secure parking, shower facilities, cleanliness, social environment, understanding of driver needs, better value
- Importance of word-of-mouth and personal experience

Case study

HGV driver, avoids A Road Services with a preference for truckstops



Rami

HGV driver

Making long trips with overnight stays, lasting 2-3 days

All over the UK, including A3 and A34

Non-user

57 years old



Type of journey

I'm making long trips with multiple deliveries. They last for days so I need to make **overnight stays**.

I travel **all over the UK**, and have done for years; I know the roads really well and all the best places to stop.

I always **plan the trip thoroughly**.

Using services

For over night stays I will do my very best to **avoid A Road services, or Motorway services** for that matter.

Truckstops are ten times better: they're set up lorry drivers, and know exactly what we need. They're normally family-run, personal and feel like a home from home. There's also a social aspect with a lounge area with other drivers.

There's secure and organised parking, where they know exactly when you're leaving in the morning and plan around this. They normally have good food and good washing facilities. Services just aren't set up in the same way. There are a few Motorway ones which are decent, but if you get stuck at an A Road Services overnight, it's just not set up for it.

Priorities

Secure parking – I'm responsible for my load, and I'll worry about it if there's no security overnight, even if I'm sleeping in the cab.

Good food. And healthy – at least not just fast food!

Enough, clean **showers** and **toilets**.

A personal, family-run environment is a nice touch.

Truckstops just take away so much of the **hassle**.

"Our company has a journey planning tool, which I always use to plan and make sure that when I have an overnight stay I'll be close to a truckstop. I'll only go to Services if I really have to. And Services on A Roads really a real last resort."

"You just don't get a good night's sleep – you'll be worried about people trying to break in, and they can be pretty noisy with people coming and going a lot, and you have to organise everything yourself. You have to check with the other drivers when they plan to leave so that you don't get boxed in..."

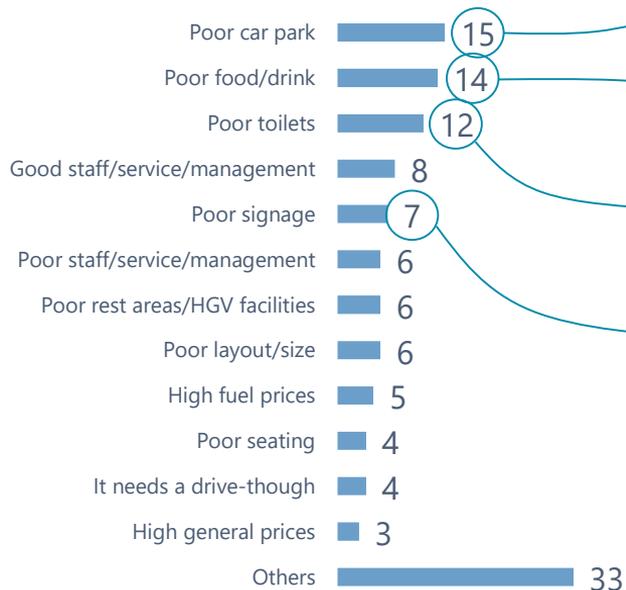
A woman wearing a dark blue dress with white polka dots and a white bow at the waist is shown from the side. She is holding a red credit card in her right hand and using her left hand to open the fuel door of a blue car. The background is a blurred outdoor setting with trees. A semi-transparent teal vertical bar is on the left side of the image.

How to improve

Message to managers...overall

Car parking and food/drink are the areas most mentioned by users

Message to managers, coded into themes (%)



Particularly on the A3 (27%), HGV drivers (27%) and commuters (21%)

“ Parking gets **very busy**, the layout is **confusing**. You see cars going the wrong way! Dangerous by roundabout cars shoot out from BP garage ”

Most mentioned by leisure users (17%) and those aged 16-34 (18%)

“ Range of food is **limited and expensive** ”

More of an issue on the A34 (16%), for business travellers (18%), commuters (15%) and women (14%)

“ I think it needs an overhaul. The toilets are **dated and creaky**. They could be **cleaner**. Staff are very helpful and courteous ”

Consistent on the A3 and A34, but most mentioned for Peartree services on the A34 (23%) and Lower Eashing services on the A3 (16%). However sample sizes are low (43 and 31 respectively)

“ The signage could be **more visible from the road**. If you haven't been here before you could easily drive past it ”

Q15. What would you like to tell those who run this service station? This could be something you liked or disliked, something that could be improved or something that you wanted but couldn't find.
Base: all giving an opinion (472)

Message to managers...overall

User comments from the quantitative survey



Poor car park

"Parking bays are straight and **aren't big enough**. Difficult parking, **not enough** parking here."

"**More parking needed** can queue sometimes for parking."

"**Expand forecourt**, make parking facility more **safe**."

"Parking is awful, usually **can't get a space**. People reverse from parking into drive thru queue, it's **dangerous**. Kerb too high along spaces parallel to A3."

"Need a **motorcycle bay** here."

"Parking gets **very busy**, the layout is **confusing**. You see cars going the wrong way! Dangerous by roundabout cars shoot out from BP garage."

"**Not enough** parking here. Parking by McDonald's is **clumsy**."



Poor toilets

"Should be free toilets here **without making purchase**."

"I think it needs a overhaul. The toilets are **dated and creaky**. They could be **cleaner**. Staff are very helpful and courteous."

"Why don't we have the **food court and toilets under one roof**?"

"Toilets are **cramped, too small**, space only enough space for 1 person in toilet area comfortably."

"The toilet area should be **expanded** to accommodate more urinals. Having to wait in the **queue** to use the facilities isn't a good thing."

"Toilets **need a clean** and dispenser for toilet roll fell on me."

"They could **install urinals** to prevent cheeky men from sneaking into the female loos."

"Everything good apart from the toilets. **Graffiti** and general **cleanliness** poor."



Poor food/drink

"There should be a place to buy a **full English breakfast** here."

"Introduce a **McDonald's or Burger King** for variety."

"They need to provide a **wider range** of hot food."

"Range of food is **limited and expensive**."

"There's a **slow start** to the weekend. KFC doesn't start till mid morning. Why isn't there a Greggs outlet here?"

"Quality of the food is **all junk food**."

"They should have **Greggs Bakers** here. KFC is not a good **breakfast option** and it's not even **open**."

"It should **list the calorie content** of all the food being sold here."



Poor signage

!Maybe this is beyond the services but access and signage from the road to the site is **far from adequate**."

"The signage could be **more visible from the road**. If you haven't been here before you could easily drive past it."

"At night **exit to road** needs to be more clearly marked."

"The sign posting could be **more conspicuous**."

"The signage to the toilets is as **confusing** as the ones from the road to the services."

"Put McDonald's **logo on sign** on A3."

"The access road is misleading. **Signage once led me to adjoining farm**."

"The **link between the food court and the forecourt** could be better. Even though I stop here regularly I still struggle with signage."

Q15. What would you like to tell those who run this service station? This could be something you liked or disliked, something that could be improved or something that you wanted but couldn't find.

Base: all giving an opinion (472)

Summary of improvements, in no particular order

What to improve?	Who wants it?	How do we know?
 Signage	Everyone	 Qual
 Ambiance / feel	Everyone	 Qual
 More services	A3, HGV	 Qual  Quant
 Parking	HGV Commuter	 Qual  Quant
 Toilets	Everyone	 Quant
 Fuel cost	Everyone Leisure, commuter	 Qual  Quant
 Food/drink cost	Everyone	 Qual
 Food/drink variety	Everyone Leisure, business, A34	 Qual  Quant
 Space to relax	HGV, leisure	 Qual

Priorities for improvement



Signage

- More **advance warning**
- **Better icons / information**
- **Advance planning** signs – showing what is available and how far



HGV facilities

- Generally lacking on the A3 and A34
- In particular **parking** and access: having somewhere suitable to park up, with enough space for a few vehicles
- And **facilities to rest/relax**: being able to get out of the vehicle to a designated area



Toilets

- **Cleanliness and feeling dated**. This often drives the general feeling of cleanliness at the services – toilets stick in the mind
- **Number of toilets** to cut down queuing. Some mention adding urinals to .
- **Finding the toilets**: sometimes not clear where they are, whether they're free to use
- Preference for a block of toilets as in Motorway Services



Food and drink

- Mentioned by the majority of people in the qualitative interviewing
- Main desire is for **greater choice**
- Natural **comparisons to Motorway Services**, where perception is that provision of food and drink is much better
- **Healthy options** – not just fast food!
- **Value** is inevitably mentioned and comes out as the worst rated aspect of food and drink



Ambiance and 'feel'

- Some maintenance and 'a bit of love' would go a long way...people are generally critical of the general feeling of **grubbiness** and being **run down**
- Perception of 'just a petrol station' and not being a nice place to take a break



More services

- Particularly on the **A3**. Address bigger gaps between services along the road
- Especially for **HGV drivers**, where many feel like they have nowhere to go – using laybys as an alternative is very common



Appendix

Qualitative stage: respondent profiles

Depth interview respondents

Qualitative respondents were recruited on the basis of:

- **All respondents** had used the A3/A34 in the past 2 months, as part of a wider journey taking at least 90 minutes of which the section on the A3/A34 made up 30 minutes or more
- **Users** had used services on the A3/A34 on a journey in the past 2 months. 'Services' included anything signed or visible from the road but excluded ad hoc/informal stop offs such as burger vans
- **Non-users** had made a relevant journey (as defined above) but did not stop at any services on that journey. Rejectors of A Road Services were excluded. As were those who simply did not have a need to use the services, due to a short journey for example

More detail on depth interview respondents is shown here, and focus group respondents on the next page

Method	Road	User/Non-User	Vehicle	Quota
Face to face	A34	User	Car	Business
Face to face	A34	Non-User	Car	Couple
Face to face	A34	Non-User	Car	Family
Face to face	A34	User	Motorbike	Motorbike
Face to face	A34	Non-User	Car	Older
Telephone	A34	User	Car	Business
Telephone	A34	User	Car	Business
Telephone	A34	User	Car	Commute
Telephone	A34	User	Car	Commute
Telephone	A34	Non-User	Car	Couple
Telephone	A34	User	Car	Disabled
Telephone	A34	Non-User	Car	Disabled
Telephone	A34	User	Car	Family
Telephone	A34	User	HGV	HGV

Method	Road	User/Non-User	Vehicle	Quota
Face to face	A3	User	Car	Commute
Face to face	A3	User	Car	Family
Face to face	A3	Non-User	HGV	HGV
Face to face	A3	Non-User	HGV	HGV
Face to face	A3	Non-User	Motorbike	Motorbike
Telephone	A3	Non-User	Car	Business
Telephone	A3	User	Car	Business/Disabled
Telephone	A3	User	Car	Commute
Telephone	A3	Non-User	Car	Commute
Telephone	A3	User	Car	Commute
Telephone	A3	User	Car	Disabled
Telephone	A3	User	Car	Family
Telephone	A3	Non-User	Car	Family
Telephone	A3	User	HGV	HGV
Telephone	A3	Non-User	HGV	HGV
Telephone	A3	User	Motorbike	Motorbike
Telephone	A3	User	Car	Older
Telephone	A3 & A34	User	HGV	HGV
Telephone	A3 & A34	A3 =User; A32 Non-User	HGV	HGV

Qualitative stage: respondent profiles

Focus groups

Group 1: A3

Resp No.	Gender	Age	Planned or Spontaneous	Journey purpose	Travelling with...	Journey frequency
1	M	50	Spontaneous	Leisure	Family	Around once a week
2	F	26	Spontaneous	Leisure	Family	Once a month or less
3	M	31	Planned	Leisure	Partner	Around once a week
4	M	60	Spontaneous	Leisure	Partner	Once a month or less
5	F	38	Planned	Business	On my own	Around once a week
6	F	36	Planned	Commute	On my own	2 to 5 times a week

Group 2: A3

Resp No.	Gender	Age	Planned or Spontaneous	Journey purpose	Travelling with...	Journey frequency
1	M	21	Planned	Leisure	Partner	2 to 3 times a month
2	M	32	Spontaneous	Commute	On my own	2 to 5 times a week
3	M	24	Spontaneous	Commute	Partner	2 to 3 times a month
4	F	46	Spontaneous	Business	On my own	2 to 3 times a month
5	F	48	Spontaneous	Leisure	Family	2 to 3 times a month
6	F	60	Planned	Leisure	On my own	2 to 3 times a month

Group 3: A34

Resp No.	Gender	Age	Planned or Spontaneous	Journey purpose	Travelling with...	Journey frequency
1	M	68	Spontaneous	Leisure	On my own	2 to 3 times a month
2	M	30	Spontaneous	Business	Partner	Around once a week
3	F	30	Spontaneous	Business	Partner	It was the first time
4	M	52	Spontaneous	Commute	On my own	Around once a week
5	F	52	Planned	Leisure	Partner	Once a month or less
6	F	38	Planned	Business	Family	2 to 3 times a month

Group 4: A34

Resp No.	Gender	Age	Planned or Spontaneous	Journey purpose	Travelling with...	Journey frequency
1	M	59	Spontaneous	Business	On my own	Once a month or less
2	M	37	Planned	Leisure	Partner	2 to 3 times a month
3	M	66	Spontaneous	Business	On my own	2 to 3 times a month
4	F	31	Spontaneous	Leisure	Partner	Once a month or less
5	F	43	Spontaneous	Leisure	Family	Once a month or less
6	M	28	Spontaneous	Commute	On my own	Around once a week

Quantitative survey: further details on methodology

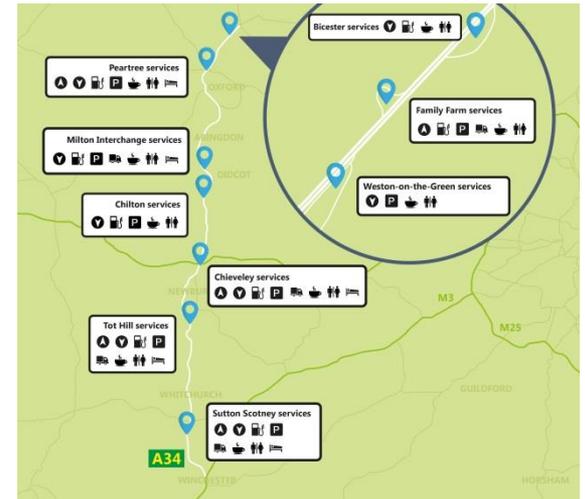
Scope of the research

The criteria for inclusion in the quantitative research of 'A' Road Services was that locations must be either **signed or visible** from the A3 or A34. This could include any unofficial services, petrol stations or pit stops along the road (as long as they are signed or visible), which a road user might use as an alternative to an official services.

A list of viable locations was established during an audit of services along both 'A' Roads (stage 1 of the research, conducted in February 2018). The audit recorded the exact location as well as details such as the facilities available, opening times, suitability for HGVs etc.

This gave a list of locations for inclusion in the quantitative stage, with some notable exclusions:

- **Chieveley Services (A34):** Chieveley is on a junction which intersects the M4 and was therefore deemed to be a Motorway Services and out of the scope of this research (separate Motorway Services research has been conducted by Transport Focus)
- **Burger vans:** the audit exercise found two burger vans on the A3 which qualified for the research. A shorter questionnaire was developed for such locations (for example, excluding irrelevant questions relating to facilities which do not exist) and fieldwork was planned for these locations on the assumption that lower sample sizes would be achieved due to low footfall. When the burger vans were re-visited during the quantitative fieldwork, the vans were not present in the majority of cases. 24 interviews were achieved at just one of these locations as a result
- **Permissions:** prior to the quantitative fieldwork, permission to interview at each location was sought. Permissions were not obtained for two locations (Tesco/Holiday Inn Guildford on the A3 and Milton Interchange on the A34) which were therefore excluded from the research



Quantitative survey: sample profile

	Total	A3	A34
Sample size	1210	437	773

Age (%)			
18-24	5	6	5
25-34	27	20	31
35-44	26	21	28
45-54	21	24	20
55-64	14	19	11
65+	7	10	5
Prefer not to say	0	0	1

Gender (%)			
Male	64	61	66
Female	36	39	34

Disability (%)			
Yes	3	4	3
No	95	96	95
Prefer not to say	2	0	3

	Total	A3	A34
Sample size	1210	437	773

Travelling with... (%)			
Alone	60	63	58
With children	6	9	4
With partner or family	36	31	39

Vehicle (%)			
Car	77	77	77
Motorbike	1	1	1
Light Commercial Vehicle / Van	12	11	12
HGV / Truck	9	8	9
Coach / minibus	1	2	1
Other	1	1	0

	Total	A3	A34
Sample size	1210	437	773

Journey purpose (%)			
Drive for a living	14	13	15
Commuting (work/college)	10	13	9
Business	22	18	25
Tour/coach group	1	1	1
Leisure	52	56	50

Audit questionnaire (1 / 2)

Locations for inclusion = anything signposted or visible from the A3 or A34.

Complete this questionnaire for each location

Date:

Name of services / location:

*This questionnaire details all information that is nice-to-have about each location. However not all is absolutely necessary. ** indicates information that is most important and should be prioritised*

GENERAL INFORMATION

- | | |
|---|---|
| 1. Road | 2. Signage |
| A3..... <input type="checkbox"/> | Signs on road..... <input type="checkbox"/> |
| A34..... <input type="checkbox"/> | No signs, but visible from road..... <input type="checkbox"/> |
| 3. Direction of travel during audit | 4. Suitable for HGVs? |
| Northbound..... <input type="checkbox"/> | Yes..... <input type="checkbox"/> |
| Southbound..... <input type="checkbox"/> | No..... <input type="checkbox"/> |
| 5. Location | 6. Access |
| Coordinates if possible, otherwise be as specific as possible | Northbound only..... <input type="checkbox"/> |
| <input type="text"/> | Southbound only..... <input type="checkbox"/> |
| | Both..... <input type="checkbox"/> |
| | 7. Services category |
| | Official..... <input type="checkbox"/> |
| | Unofficial..... <input type="checkbox"/> |

- 8.** Brief overview of services: size, facilities, suitability for HGVs, ease of use / access, anything else of note. Overall impressions, and would you use again?

APPROACHING THE SERVICES

****** Use dashcam to record photo/video of any signage from A Road to services

****** Signage - whilst on A Road (if applicable)

- 9.** Number of signs whilst on A Road

- 10.** Where are the signs? E.g. distance from services, anything notable about location, any obstructions

- 11.** Are the signs for services standalone or part of a larger sign with other details? Also detail whether there is any unofficial signage for the services

- 12.** What colour are the signs? E.g. black text on white background, white on green, other

- Black text on white background.....
 White text on green background.....
 Other (specify to the right).....

- 13.** What facilities are signed for? (Tick box and specify to the right, e.g. brand)

- Fuel.....

- Parking.....

- HGV suitable.....

- Food/drink.....

- Toilets.....

- Hotel.....

- Shop.....

- Other.....

- 14.** Are opening hours given on sign?

- Yes.....
 No.....

- If yes, what are the advertised opening hours on the sign?
 24 hours.....
 Not 24 hours.....
 Other (specify below).....

- 15.** Other details: anything else notable on signage E.g. clarity, anything done well/not well

Approach to the services

- 16.** Approx. distance from A Road

- 17.** Approx time taken from leaving road to parking (mins)

- 18.** Other details: anything else notable on approach E.g. how services are accessed, obstacles, difficulties, ease of approach, clarity of where to go etc.

PARKING

- 19.** Are there signs telling you where to park on arrival?

- Yes and they are clear..... Yes but they are not clear..... No.....

- 20.** How many parking areas are there in the whole of the services?

- 21.** Brief description of parking areas, incl. approx. spaces in each

- 22.** Number of parking areas within the whole service area, and approx. number of spaces overall. e.g. if there is a main car park with 50 car spaces and a separate cafe with 10 car spaces, for 'Car' enter 2 in the first box and 60 in the second box

	Areas	Spaces		Areas	Spaces		Areas	Spaces
Car (excl. disabled)	<input type="text"/>	<input type="text"/>	Motorbike	<input type="text"/>	<input type="text"/>	Disabled parking	<input type="text"/>	<input type="text"/>

HGV	<input type="text"/>	<input type="text"/>	Coach	<input type="text"/>	<input type="text"/>
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- 23.** For which of the following vehicles is there 2 hours free parking at any of the parking areas?

- Car..... Motorbike.....
 HGV..... Coach.....

Audit questionnaire (2 / 2)

FACILITIES

****Where possible take photos of:**

- The service area as a whole
 - Exterior photos of areas with high footfall (the places where most people are likely to go)
 - Interior photos of facilities (as far as possible / allowed)
- Images will be used as prompts during focus groups and also to inform where best to conduct intercept interviews at the services

24. **What are the opening hours of the services? If not clear ask staff. Tick the relevant box AND give details as far as possible

- 24 hours..... Details
- Open min. 8am to 8pm daily.....
- Less than 8am to 8pm daily.....

Details

25. **What facilities are available? Tick box and record how many of each facility, the brand name(s) and the actual opening hours of each (this might be different to what is on any signs)

- Fuel.....
- Parking.....
- HGV parking.....
- Shop (for items other than food/drink).....
- Cold food/drink (takeaway).....
- Hot food/drink (takeaway).....
- Café/restaurant.....
- Free toilets (with no need to make a purchase).....
- Other toilets.....

Shower/washing facilities for HGV drivers, including lockers...

Cash operated telephone.....

Hotel.....

Wi-Fi.....

Other (specify).....

26. **How many fuel pumps are there for HGVs and 'normal' vehicles?

HGV No. of pumps 'Normal' vehicles (car, van, motorbike etc.) No. of pumps

27. **Are hot food and hot drinks available 8am to 8pm for consumption on the premises? Yes..... No.....

28. How many separate buildings are there, that are for customer use? Please detail how many, a brief description, the facilities within each and whether they have a 'sit down' area (including seating capacity). Please also detail any outside seating areas

29. How many toilets are there in the whole of the services? Detail below: the number of toilet facilities, number of cubicles within each, number of disabled toilets and comment on upkeep, cleanliness

Toilet 1		
Location	No. of cubicles	Comment
Toilet 2		
Location	No. of cubicles	Comment

Toilet 3		
Location	No. of cubicles	Comment

30. Thinking about the services as a whole, and taking into account the different areas (where there is more than one), please assess each of the following:

Range of facilities
Selection of food/drink/retail options
Areas to sit/relax
Ease of finding what you need
General level of service from staff
Standard of maintenance / upkeep
Cleanliness and litter
Provision for HGVs / coach groups

Quality Standards and Other Details

BDRC is certified to ISO 20252 and 27001, the recognised international quality standards for market research and information security.

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

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

This research was designed to ensure robust sample sizes for analysis. As the quantitative survey is conducted with a sample of A Road Services users (as opposed to all of them), there could be some differences in results compared to a census of the whole population. The table below shows the accuracy of data at total level to a 95% degree of confidence, based on results at different percentages (results nearer to 0% or 100% are statistically more accurate).

	Survey finding of...		
	5 / 95%	20 / 80%	50 / 50%
<u>Total Sample (1210)</u>	<u>+/- 1.2%</u>	<u>+/- 2.3%</u>	<u>+/- 2.8%</u>
<u>A3 (437)</u>	<u>+/- 2.0%</u>	<u>+/- 3.8%</u>	<u>+/- 4.7%</u>
<u>A34 (773)</u>	<u>+/- 1.5%</u>	<u>+/- 2.8%</u>	<u>+/- 3.5%</u>