



Motorway Services User Survey

Spring 2019



Foreword

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

Now in its third year, Transport Focus's Motorway Services User Survey is the established measure of satisfaction with customer experience when taking a break on motorways. Alongside Transport Focus's new Strategic Roads User Survey, this gives drivers using England's motorways and major 'A' roads – the Strategic Road Network – a clear voice.

Motorway service area (MSA) operators are responding positively to the results by targeting improvements where they are most needed. This is making a real difference to the experience of drivers stopping at services. A clear example is the significant increase in satisfaction achieved by last year's poorest performing site – the result of increased focus and investment by the operator.

MSAs play an important role in providing the break motorists need during a long journey.

Visitors report feeling much less tired, stressed and frustrated after their stop at the services – surely making the roads flow more smoothly and safely for all road users.

Among the 11,600 visitors surveyed satisfaction remains high at 90 per cent. Despite such high satisfaction, Transport Focus encourages the industry to challenge itself to offer even higher standards. This survey highlights the potential areas for improvement such as value for money and the range of food on offer.

Transport Focus continues to work with the industry to use the detailed results and intends to repeat this survey annually.

Jeff Halliwell
Chair

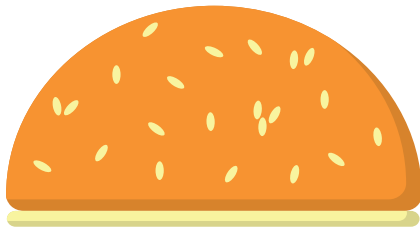
Motorway Services User Survey 2019



90%



of visitors are satisfied with their experience at the motorway services

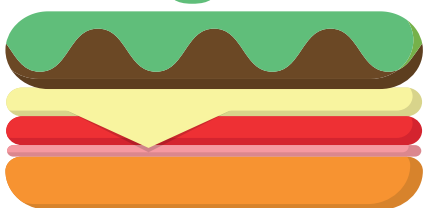


89%

rate the cleanliness of the toilets as good

91%

rate the quality of the food and drink as good



59%

rate the value for money of food and drink as good

30%

uplift in visitors who feel happy or relaxed after their visit

20%

reduction in visitors who feel tired, stressed or frustrated after their visit



Services

111 motorway services rated by over 11,600 road users in the survey

Key findings

Overall satisfaction

Overall satisfaction remains high at 90 per cent. However, fewer visitors describe themselves as very satisfied compared to last year. Dissatisfaction remains low at three per cent.

Visitors with a disability report similar satisfaction with their experience at 87 per cent. However, only 29 per cent thought the MSA catered very well for their disability, down from 37 per cent last year.

Professional visitors - those who drive for a living - are the least satisfied group at 83 per cent. They have seen the biggest drop in overall satisfaction, down from 88 per cent last year. Commuters are the most satisfied visitor group at 94 per cent.

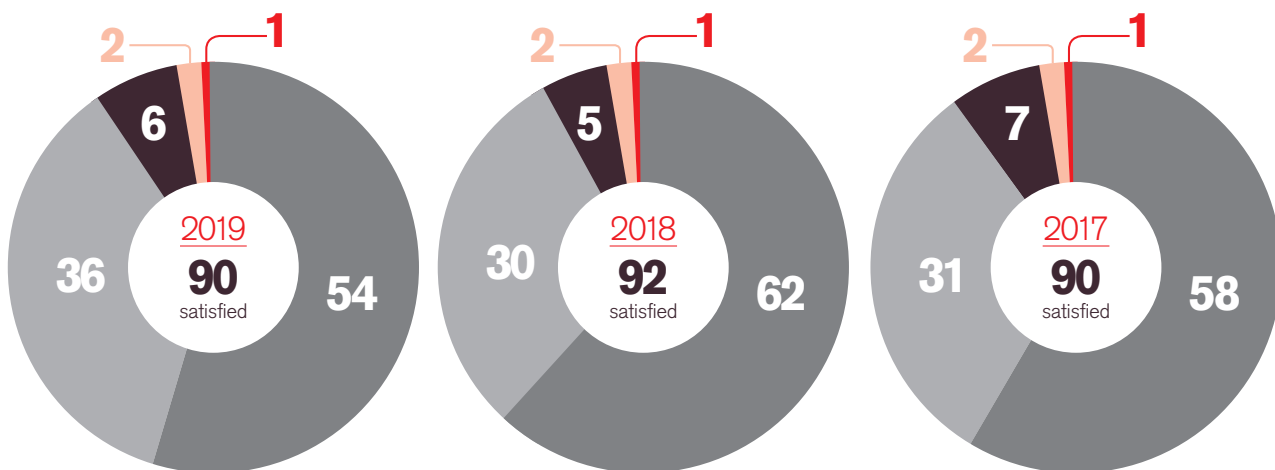
Satisfaction across individual operators ranges from 86 per cent to 98 per cent. The three biggest operators – Moto, Roadchef and Welcome Break – all achieve at least 90 per cent satisfaction. Westmorland, operator of four sites in the survey, achieves the highest satisfaction score and is the only operator to see an improvement on its 2018 score.

At the 111 individual MSAs satisfaction ranges from 72 per cent to 99 per cent. Almost two thirds of the MSAs



score 90 per cent or above. Norton Canes is the highest rated site for the second year running. Thurrock is the most improved site with satisfaction up 25 percentage points, at 93 per cent this year compared to 68 per cent in 2018. Other sites with notable improvements are Heston West (up 12 points to 99 per cent) and Heston East, Oxford and Rownhams South (all up 9 points).

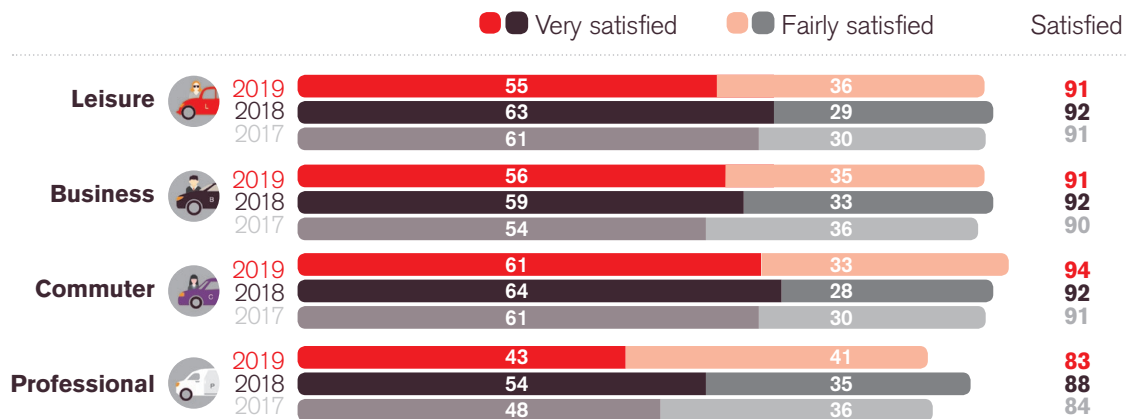
1 Overall satisfaction (%)



Legend: Very satisfied (dark grey), Fairly satisfied (light grey), Neither/nor (dark blue), Fairly dissatisfied (orange), Very dissatisfied (red)

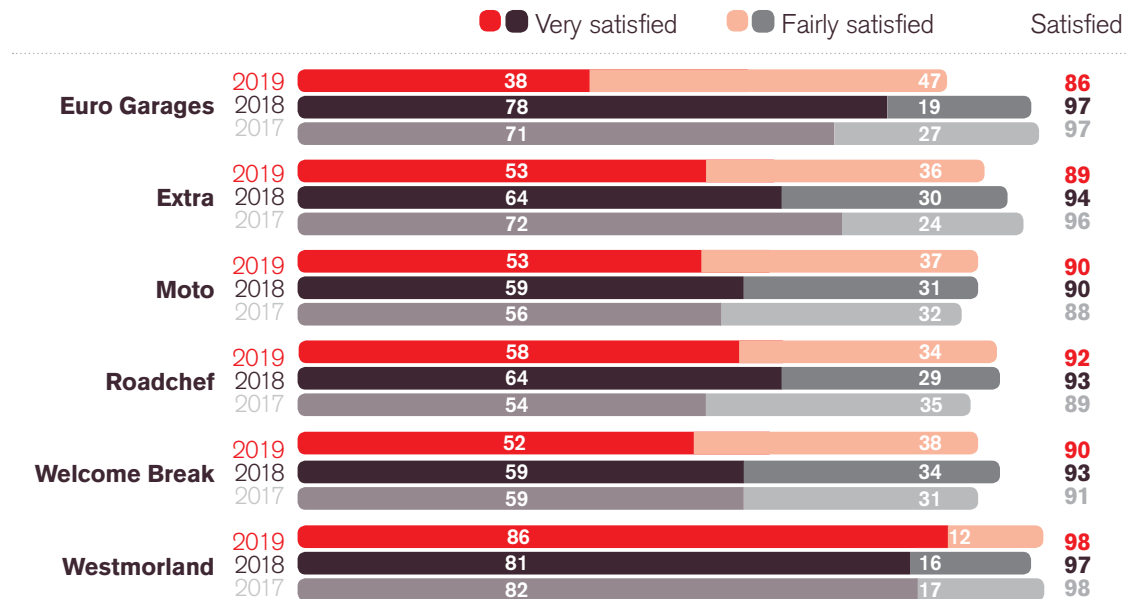
Base (2019/2018/2017): all MSA visitors (11609/9626/8701)

2 Overall satisfaction by MSA visitor type (%)



Base (2019/2018/2017): all MSA visitors (11609/9626/8701), Leisure (7270/6254/5594), Business (2494/1745/1534), Commuter (585/634/617), Professional (1253/980/947)

3 Overall satisfaction by MSA operator (%)



Base (2019/2018/2017): all MSA visitors (11609/9626/8701), Euro Garages (186/176/150), Extra (643/516/453), Moto (4698/3895/3498), Roadchef (2416/2004/1785), Welcome Break (3194/2662/2388), Westmorland (466/360/340). Number of sites each MSA operator runs: Euro Garages (2), Extra (6), Moto (45), Roadchef (23), Welcome Break (31), Westmorland (4)

"Everything I need is provided here. It's a good location. For a business trip it's got Costa, toilets or, for a quick meal, McDonald's. It's just perfect."

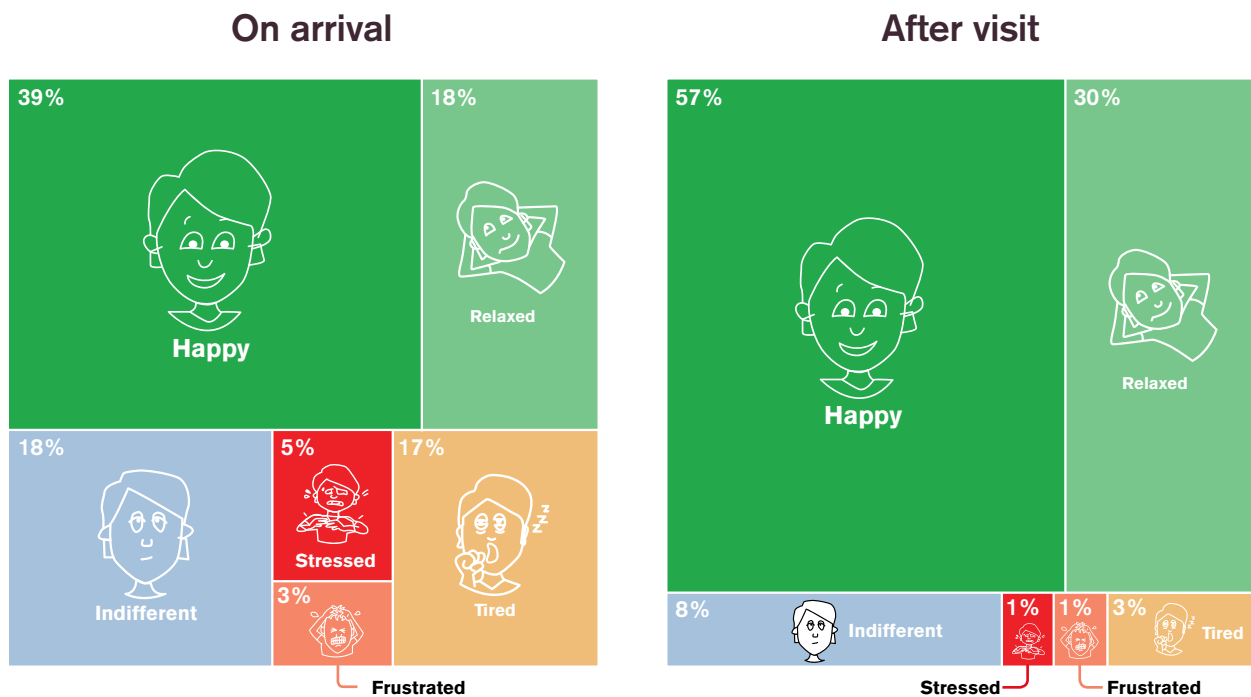
business user

The impact a motorway service area visit has on mood

Visitors were asked how they felt when they arrived at the services and how they felt when they left. 25 per cent of visitors say they arrive feeling tired, frustrated or stressed. The visit to the MSA significantly reduces these negative moods to just five per cent.

There was a corresponding increase in visitors reporting a positive mood change. 87 per cent of visitors say they feel happy or relaxed after the visit, an increase of 30 percentage points. This is higher than the uplifts reported in 2018 (25 points) and 2017 (20 points).

4 Mood on arrival and exit (%)



2019

30% increase in happy/relaxed
20% decrease in tired/stressed/frustrated

2018

25% increase in happy/relaxed
19% decrease in tired/stressed/frustrated

2017

20% increase in happy/relaxed
17% decrease in tired/stressed/frustrated

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

Base (2019/2018/2017): all MSA visitors (11609/9626/8701)

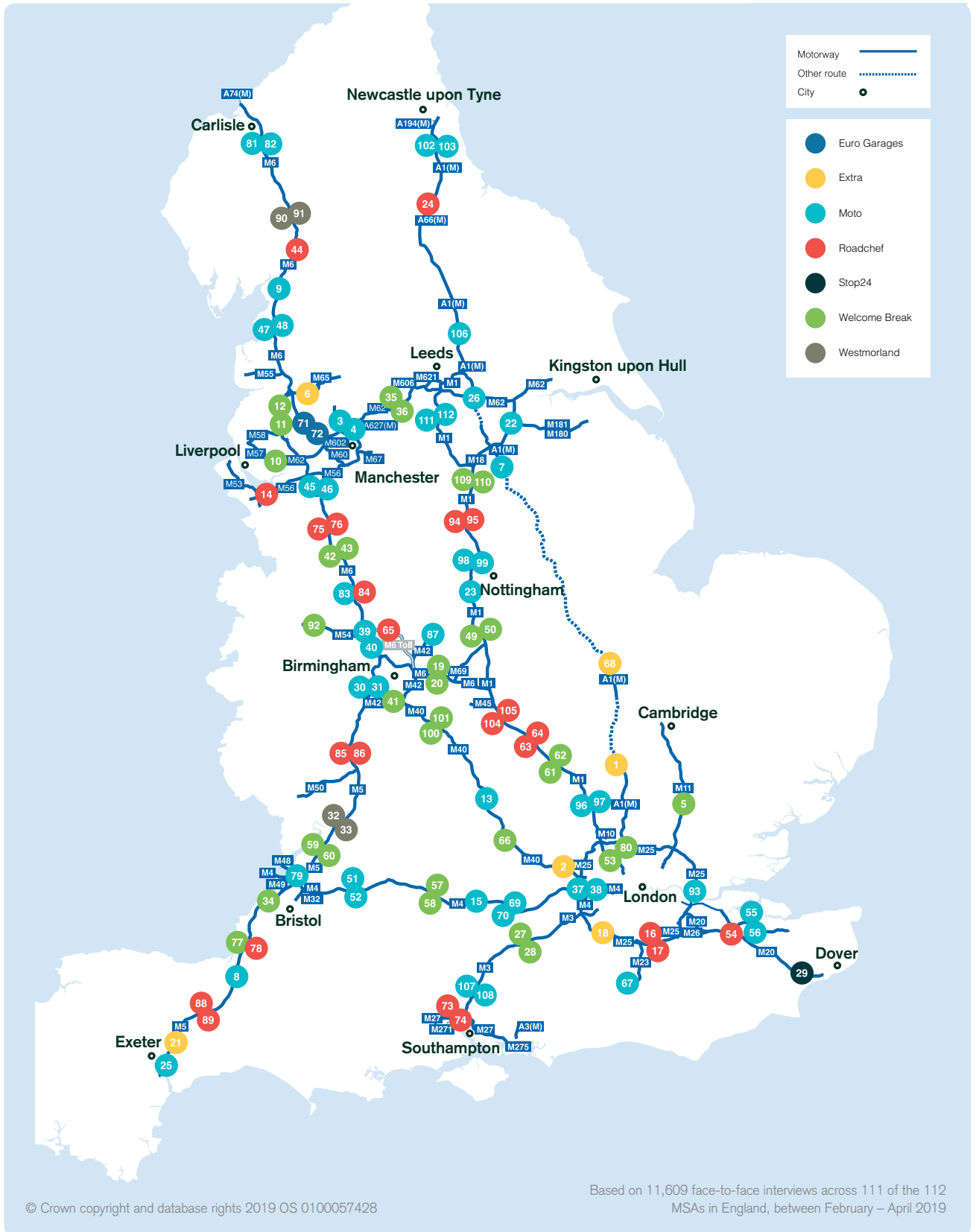
"I sat outside in the sun by the lake and fed the ducks. It was really relaxing."

business user

"It's a good place for HGV drivers to rest before completing their journey."

professional user

Overall satisfaction by motorway service area



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

* Folkestone Services operated by Stop24 chose not to participate in the 2019 survey

Arrival at motorway service areas

Visitors rated the various aspects they saw or used as they arrived at the MSA. Road surfaces in the MSA and the impression of the outside of the building are the lowest rated, while the walk from the vehicle to the building is the highest rated. On some of these

measures there are significant variations across operators. For example, the impression of the outside of the building is rated as very good by 96 per cent of Westmorland's visitors while across the other five operators this ranges from 36 per cent to 44 per cent.

5 How visitors rated the MSA upon arrival (%)



Approach signs

62 very good
30 fairly good

92 good



Slip road

54 very good
32 fairly good

86 good



Car park layout

49 very good
34 fairly good

83 good



Road surfaces in MSA

42 very good
36 fairly good

77 good



Feeling of safety leaving vehicle

58 very good
33 fairly good

91 good



Walk from vehicle to building

63 very good
30 fairly good

93 good



Impression of building outside

43 very good
36 fairly good

79 good



Impression of building inside

45 very good
37 fairly good

83 good

Base (2019): all MSA visitors (11609)

*"Very good first impressions.
Clean and open and easy to find
everything you want."*

leisure user



Facilities in the motorway service area

More than two thirds of visitors used the toilets during their visit. The number of toilets available is the most highly rated aspect while quality of fixtures is lowest rated at 82 per cent. There are significant differences between operators with Westmorland toilets rated most highly on all measures, followed by Roadchef.

The second most common activity was buying food and drink to eat in the MSA, with half of visitors doing this. Ratings for this area such as friendliness of the staff, speed of service and the quality of the food and drink were rated well across all operators. Satisfaction with the range of food has fallen slightly, with 85 per cent saying

it was good compared to 87 per cent (2018) and 88 per cent (2017).

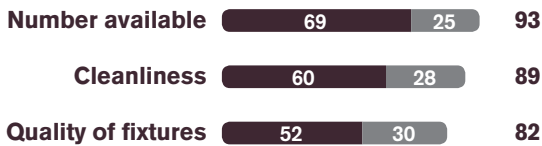
Value for money of food and drink was the lowest rated of these factors with 59 per cent describing it as good, down from 64 per cent in the previous year. Operators performing better than the average on value for money are Westmorland (81 per cent), Extra (77 per cent) and Roadchef (65 per cent).

HGV drivers continue to be less satisfied with the facilities offered specifically for them, such as parking and showers than they are with other aspects.

6 How visitors rated the toilets (%)



Very good Fairly good Good



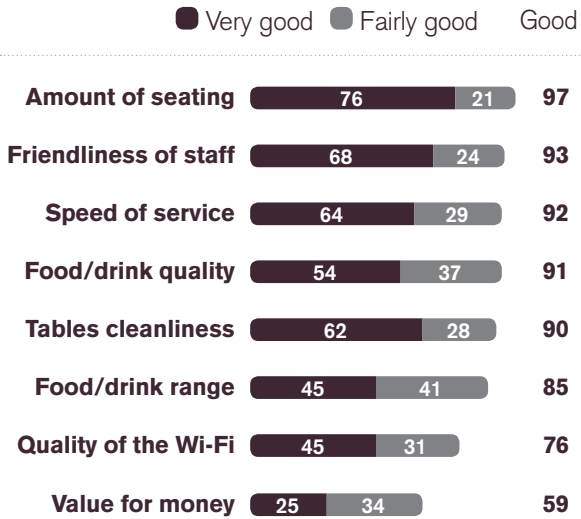
Base: all MSA visitors using the toilets (7759). Used by 69% of visitors

"I'm quite happy. It's all clean and today the toilets were clean."

leisure user



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

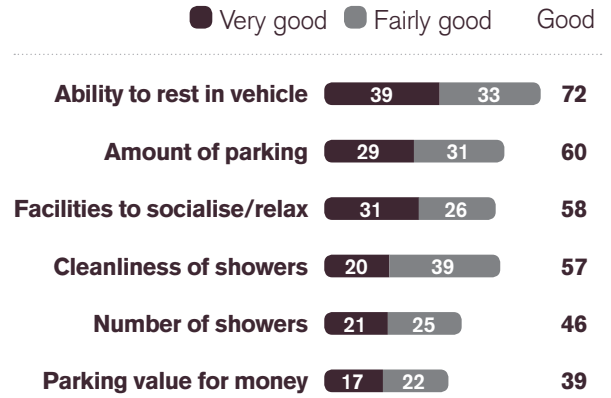


Base: all MSA visitors buying food and drink to eat in the MSA (6027). Done by 52% of visitors

"Prices could be a little lower, but quality is excellent."

leisure user

8 How visitors rated the HGV facilities (%)



Base: all MSA visitors using HGV facilities (between 1044-393)

"Since they have done the refurbishment there are more HGV parking spaces. Before that it was 6 or 7 spaces and it was muddy. Now it's much better."

professional user



Comments about the motorway service area experience

Visitors suggested areas they might like to see improved or commented on things they particularly liked. Although 85 per cent of visitors who bought food to eat in the services rated the range as good some suggested it was an area that could be improved. Suggestions included offering greater variety, more healthy choices and products suitable for those with food allergies or intolerances. The price of goods was another frequently mentioned area for improvement and also tended to be a lower-rated aspect. There were suggestions for improving toilets; these ranged from day-to-day issues of cleanliness and upkeep to more substantial concerns regarding the fixtures and maintenance.

There were a number of comments about the main MSA building, suggesting a wide range of potential improvements, for example, to seating, layout and temperature. However, this was also a subject that prompted many positive comments with visitors appreciating where investment had been made and buildings redeveloped. The impression of the building, along with the toilets and the range and quality of food and drink are important influencers of how satisfied visitors are overall.

Many positive comments were made by customers appreciating the service from friendly and helpful staff.

9 Improving the motorway service area experience %

Suggested improvement areas



Expand 'food to eat in' range

14



Price/value for goods/retail/fuel/other

12



Toilets cleanliness/order of fixtures/maintenance

11



Main building (except toilets)

10



Views on whole MSA building

9

% shown is of all visitors who made a comment (6214)

"A disabled toilet at the front of the building would be good. They are a long way from the entrance."

leisure user

"Have more food choices. There is only really a Burger King to get hot food."

commuter

Profile of visitors

Who visits MSAs

Almost two thirds of the MSA visitors in the survey were travelling for leisure reasons. Travelling on business was the next most common purpose at 22 per cent. Other visitors were professionals (11 per cent) and commuters (five per cent). Leisure visitors were evenly split between men and women but all other groups had a much higher proportion of men. This was especially true for professionals with 98 per cent being men.

Journey time and length of break

Typically, people drove for about an hour and a half before stopping to take a 20 minute break. Commuters had the shortest journeys, travelling for one hour before stopping for quarter of an hour. Professionals were on the road a lot longer before they stopped at an average two and three quarter hours. They also tended to have a longer break than other visitors, taking an average of 30 minutes.

How often they visit

Half of visitors told us that it was either the first time they had visited that particular MSA or that they stop there only occasionally. Two in ten people stop at the same MSA at

least every two weeks. This is much higher among professional drivers with six in ten stopping at that same services at least every two weeks.

Planning to stop

Almost half of visitors (48 per cent) plan which particular MSA to stop at before setting off, with the rest deciding while they are on their journey. However, there are differences between operators – the range of those who plan is from 43 per cent to 76 per cent. Westmorland visitors are the most likely to plan to stop there before they set off.

Reasons for visiting

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

Visiting the MSA in future

A third of visitors would be more likely to choose the same MSA again, rather than another one nearby, as a result of their experience.



"Everything in these places is expensive. But it is just off the motorway so it's handy."

professional user

"The staff are always very friendly and helpful here."

leisure user



Survey method

11,609 visitors were interviewed as they left MSAs, to capture in-the-moment feedback about their experience. Trained interviewers asked about their experience using a short questionnaire. This took place at 111 of England's 112 MSAs*.

At each MSA there were six six-hour interview shifts, four on weekdays and two at weekends. Interviews were spread across different times of the day to cover a wide range of visitors.

Responses from each MSA counted equally towards the overall results. When an all MSA or all visitor average is quoted this includes results from all six operators involved in the survey. There are also some individual results shown for each of these operators.

Transport Focus was supported by BVA BDRC, an independent research agency, in conducting this research. The fieldwork was carried out between February and April 2019, the same time as the survey was carried out in previous years.

*Folkestone Services operated by Stop24 chose not to participate in the 2019 survey.

Background

The Department for Transport (DfT) sets the policy for the spacing of MSAs and the facilities they need to provide. Highways England is the government-owned company that operates, maintains and improves England's motorways and major 'A' roads. It supports the planning process for MSAs, provides the road signs to them and supports the DfT in managing its policy.

MSAs must be open 24 hours a day, 365 days a year. They must offer fuel, two hours free parking, toilets and washing facilities, hot food and drinks.

There are 112 MSAs in England operated by seven different companies (see map on pages 8 and 9 for details). 78 of the sites are in pairs on either side of the motorway, although not always with public access between the two.

MSA operator	Number of sites
Euro Garages	2
Extra	6
Moto	45
Roadchef	23
Stop24	1
Welcome Break	31
Westmorland	4

Contact Transport Focus

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Transport Focus is the operating name of the Passengers' Council