



Motorway Services User Survey 2020

Introduction

Transport Focus's Motorway Services User Survey measures customer satisfaction across all of England's 112 motorway service areas (MSAs). Now in its fourth year it allows MSA operators to benchmark results and measure improvements.

93 per cent of the 9800 visitors we spoke to were satisfied, an improvement on last year's 90 per cent and the highest since the survey started. 64 per cent of visitors were very satisfied.

MSAs continue to do a good job of their most important safety function - allowing drivers to rest and relax before getting back on the road. 27 per cent of visitors arrived feeling tired, frustrated or stressed. The visit to the MSA significantly

reduced visitors' negative mood to just five per cent.

We know from previous years that MSA operators respond to these results by targeting improvements where they are needed most.

"Nice little service station, plenty of parking out the front, not overly busy."

Business user

Methodology and impact of Covid-19 on fieldwork

Our interviewers took visitors through a short survey as they left, at all 112 of England's MSAs, to capture in-the-moment feedback about their experience. These interviews were carried out between 8 February and 16 March before the Covid-19 lockdown. Interviewing was cut short by the outbreak of Covid-19 at which point around two thirds of intended fieldwork had been completed, a total of 9808 interviews.

At many MSAs we were unable to complete the intended number and spread of interview shifts. Consequently, results at individual MSAs are not sufficiently comparable on a like-for-like basis. Results for this year's survey are therefore reported at sector, operator and visitor-type level only, where the effect of this is substantially reduced. These factors should be kept in mind when comparing results to previous years.

"Good atmosphere, staff very friendly, everything is clean and tidy. Main thing is the staff are fabulous - they go out of their way to make you feel comfortable."

Leisure user

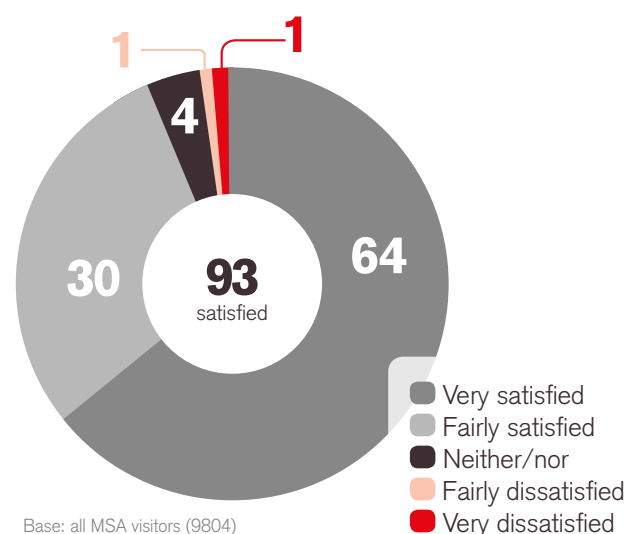
MSA operator	Number of sites
Euro Garages	2
Extra	6
Moto	45
Roadchef	23
Stop24	1
Welcome Break	31
Westmorland	4

Overall satisfaction

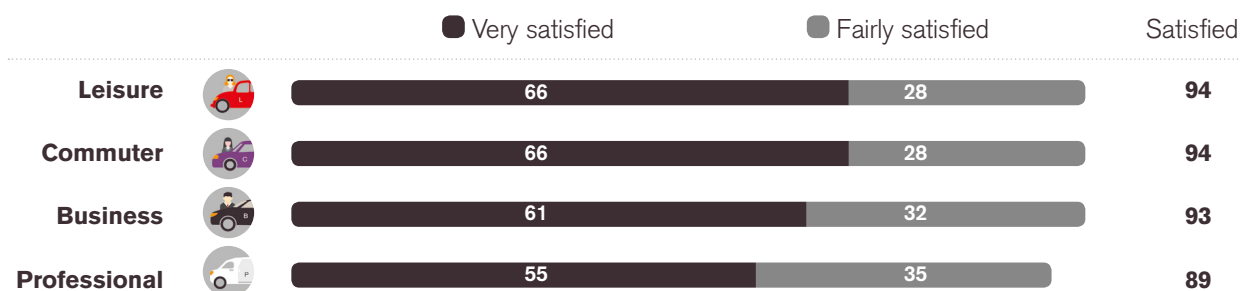
93 per cent of visitors to MSAs were satisfied with their experience, an improvement of three percentage points on 2019. 64 per cent were very satisfied. Six percent of visitors were disabled and they were less content with 91 per cent satisfied. Nine percent said the MSA catered poorly for their impairment. Visitors travelling for leisure or commuting were the most satisfied (94 per cent). Professional drivers remain the least content with 89 per cent reporting that they were satisfied - however, this has increased from 83 per cent in 2019.

Satisfaction was high across all MSA operators, ranging from 92 per cent to 97 per cent. Westmorland had the highest proportion of very satisfied visitors at 87 per cent. Euro Garages had the biggest year-on-year increase in satisfaction from 86 per cent to 96 per cent. Extra also saw a significant increase in satisfaction of eight percentage points to 97 per cent. All three of the larger operators saw an increase in satisfaction this year; Roadchef (up from 92 per cent to 95 per cent), Moto (up from 90 per cent to 93 per cent and Welcome Break (up from 90 per cent to 92 per cent).

1 Overall satisfaction (%)



2 Overall satisfaction by MSA visitor type (%)



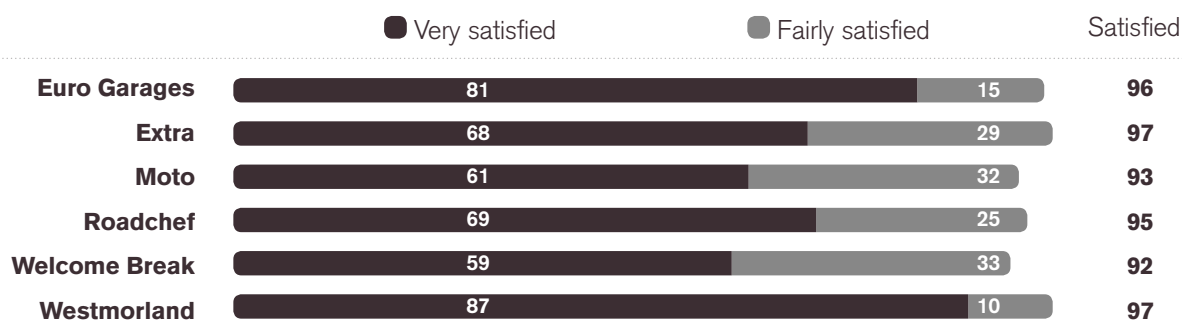
"Overall quality of services and food, excellent dog walking facilities and local fresh food is very good."

Leisure user

"Better disabled ramps. These ones you are doubling up on your walking distance. For less abled bodied this is crazy."

Commuter

3 Overall satisfaction by MSA operator (%)



Overall impressions and mood

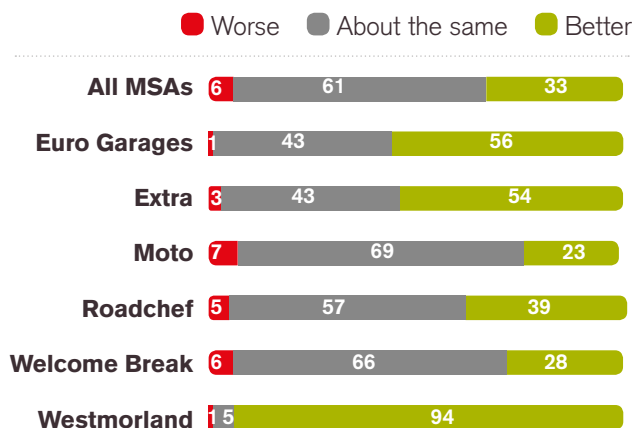
Visitors were asked how they thought the MSA they had stopped at compared to other MSAs. Around three fifths of MSAs were thought to be 'about the same', a third were considered 'better' and just six per cent described as 'worse'. The MSA operators with fewer sites tended to perform best on this measure. Across the four Westmorland sites 94 per cent of visitors felt they were 'better'. Euro Garages (two sites) and Extra (six sites) both had more than half of visitors describing these MSAs as 'better' than others.

*"Worth a stop and look round.
Relaxing, pleasant and peaceful."*

Leisure user

Visitors were asked how they felt when they arrived at the services and how they felt when they left. More than a quarter (27 per cent) of visitors said they arrived feeling tired, frustrated or stressed. The visit to the MSA significantly reduced visitors' negative mood to just five per cent. There was a corresponding increase in visitors reporting a positive mood change. When arriving at the MSAs just over half of visitors (52 per cent) were feeling happy or relaxed. This increased to 85 per cent after their experience at the MSA.

4 How MSAs compare with others (%)

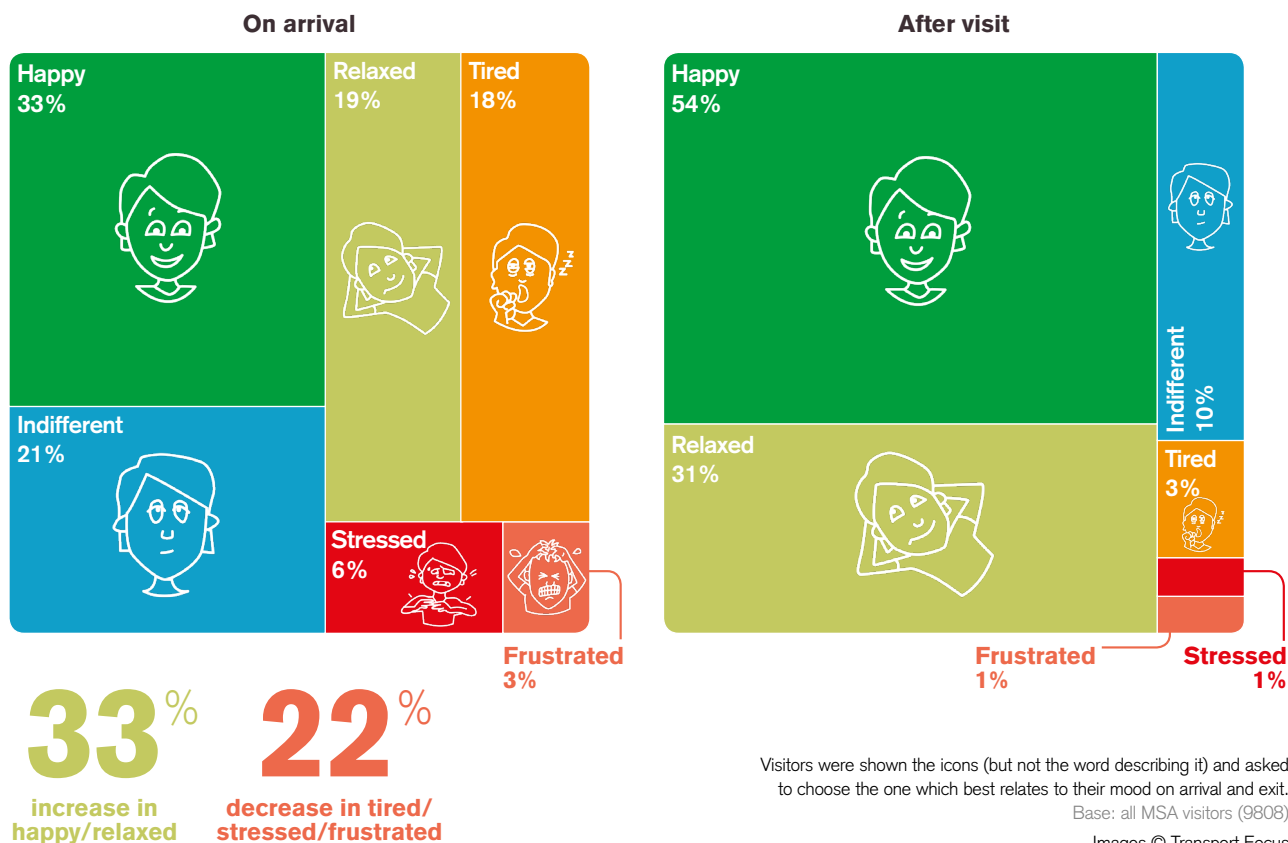


Base: all MSA visitors (9808), Euro Garages (196), Extra (551), Moto (3901), Roadchef (2002), Welcome Break (2658), Westmorland (385)

*"Somewhere to get a proper meal, not
fast food, maybe even a separate
cafe for HGV drivers."*

Professional user

5 Mood on arrival and exit (%)



Facilities in the motorway service area

Almost three quarters of visitors used the toilets at the MSA. Satisfaction with the number of toilets available and the cleanliness of the toilets was high at 93 per cent and 89 per cent respectively. The quality of the fixtures was rated slightly lower at 82 per cent. Euro Garages, Westmorland and Roadchef were the best performing operators on these measures.

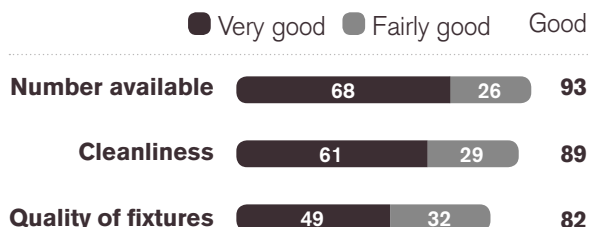
Just over a third of visitors bought food or drink to eat in the services. Quality of food and drink, speed of service and friendliness of the staff was well-rated across all operators with at least nine in ten visitors satisfied. Value for money was the lowest rated of these measures with 69 per cent of visitors satisfied - but this is an increase of 11 percentage points from 2019.

As in previous years, HGV drivers tended to be less satisfied with the facilities provided specifically for them such as parking and showers than with other elements of their visit. The value for the money of the parking package was lowest rated at 38 per cent.

"The car park is too tight and needs to be bigger. Surface uneven so loads of surface water."

Business user

6 How visitors rated the toilets (%)



Base: all MSA visitors using the toilets (between 6670-6690).
Used by 72% of visitors

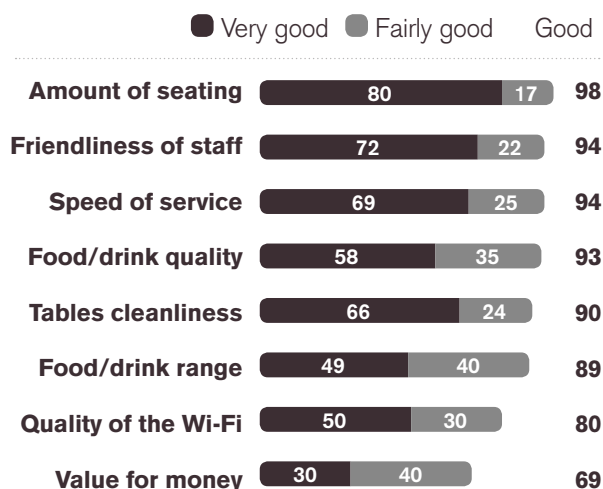
"Upgraded toilets are big improvement, clean and a lot better than it was."

Business user

"I liked the range of food here. Staff were nice, helpful and efficient and smiled."

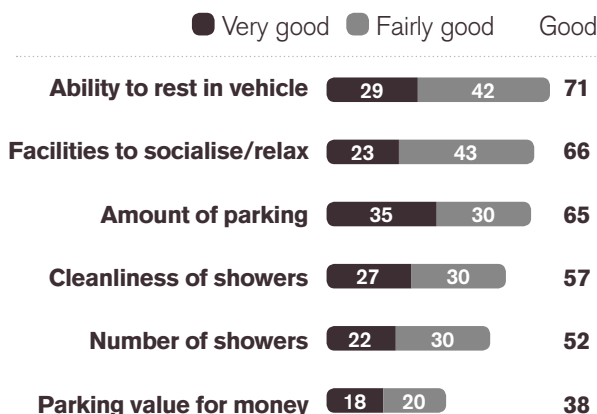
Commuter

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 (between 3351-3386 except Wi-Fi 675). Done by 35% of visitors

8 How visitors rated the HGV facilities (%)



Base: all MSA visitors using HGV facilities (between 271-713)

9 How visitors rated the MSA upon arrival (%)



Approach signs

56 very good
33 fairly good

89 good

Base: 9352



Road surfaces in MSA

38 very good
38 fairly good

76 good

Base: 9445