Motorway Services User Survey 2020

Contents

Background

Transport Focus represents the interests of users of England's motorways and major 'A' roads, known as the Strategic Road Network (SRN).

As part of its work, Transport Focus has been tracking how well Motorway Service Areas (MSAs) are meeting the needs of different SRN user groups. In the survey's fourth year, Transport Focus worked with Watermelon Research to conduct the survey of user satisfaction with MSAs.

The survey's objectives include:

- robustly measure MSA satisfaction across all MSAs
- understand how visiting an MSA changes mood
- understand what factors are most important for driving satisfaction in order to help operators develop strategies to improve satisfaction.

Methodology (1)

Watermelon Research interviewers undertook face-to-face interviews prior to lockdown using tablet devices as visitors left all 112 of England's MSAs.

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.

In previous years, data was weighted to ensure each MSA contributed equally to overall results. With the fieldwork period shortened and the range of interviews completed at each MSA varying more widely than in previous years it was decided not to weight the data this year.

The previous years are shown as they were published on their weighted basis. These factors should be kept in mind when comparing results to previous years.

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Methodology (2)

Fieldwork dates		
	Start	End
2017	13 February	9 April
2018	12 February	12 April
2019	8 February	17 April
2020	**8 February**	**16 March**

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

*Stop24 is a single site operator. It is therefore not reported at operator-level but results are included within overall, sector and visitor-type level results.

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Response profile

Visitor Type		2019	2020
	Leisure	63%	65%
	Commuter	5%	7%
	Business	22%	19%
	Professional	11%	9%

Gender		2019	2020
♂	Male	63%	61%
♀	Female	37%	39%
	18-34	20%	22%
	35-54	39%	39%
	55+	41%	40%

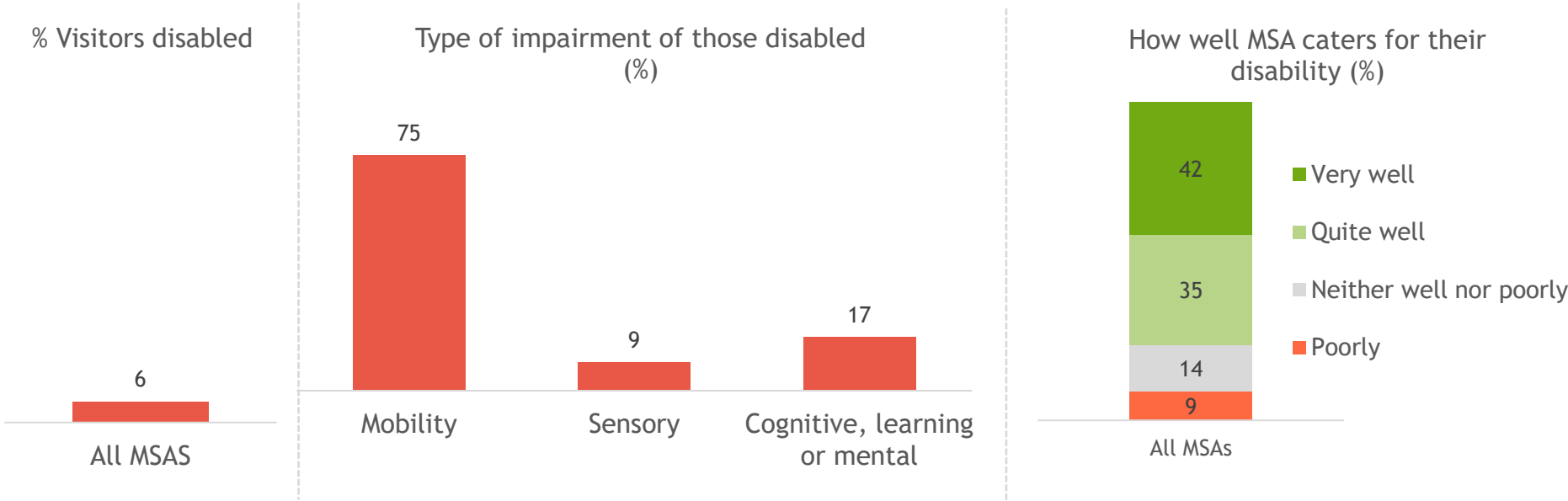| Vehicle		2019	2020
	Car	79%	82%
	HGV/Truck	9%	8%
	LCV	6%	6%
	Coach	5%	4%

Disabled visitors

Across all MSAs, 6% of visitors have a physical or mental health impairment and of those the majority (75%) have mobility issues

% Visitors disabled

6

All MSAS

Type of impairment of those disabled (%)

75	9	17
Mobility	Sensory	Cognitive, learning or mental

How well MSA caters for their disability (%)

- 42 ■ Very well
- 35 ■ Quite well
- 14 ■ Neither well nor poorly
- 9 ■ Poorly

All MSAs

Q22 Do you, or anyone with you have a long-term physical or mental health impairment which limits the daily activities or work you/they can do? Q25 What type of impairment is that? Q23. How well do you think these Motorways Services catered for your impairment(s)?

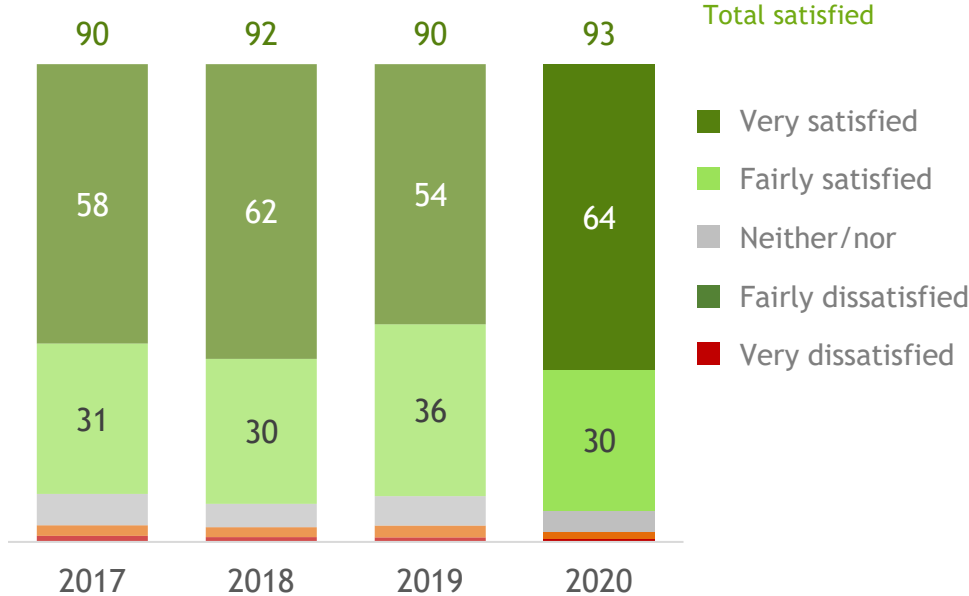Base: All MSAs: 9,808; Type of impairment 569; and How well caters for disability 557.

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Overall satisfaction

Trends; satisfaction by operator; and by visitor type
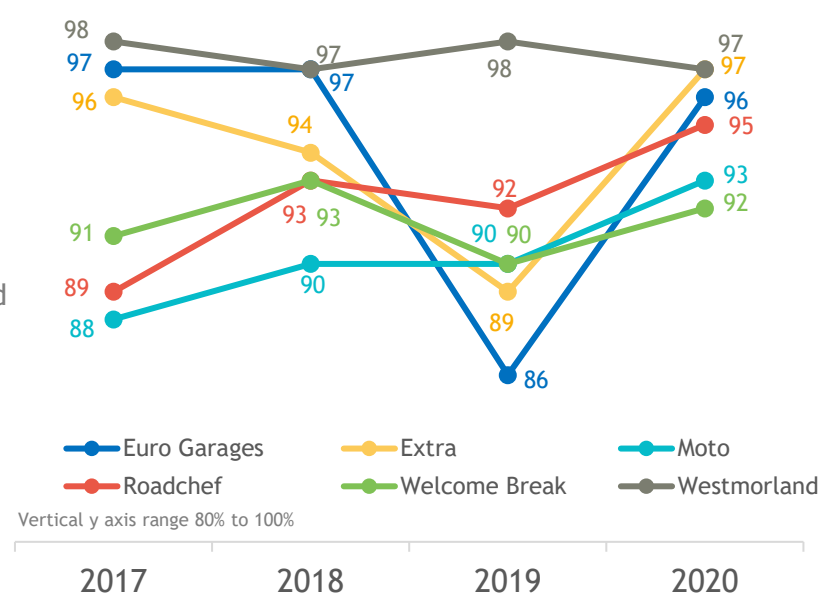
Watermelon

Trends and operator comparison

93% of visitors to the MSA are either fairly or very satisfied with their experience at the MSA. This is a three percentage point improvement on 2019, with a further 10 percentage point improvement for those being very satisfied.

Overall satisfaction (%)

Total satisfied

Year	Total	Very satisfied / Fairly satisfied
2017	90	58 / 31
2018	92	62 / 30
2019	90	54 / 36
2020	93	64 / 30

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

Total satisfaction by operator (%)

Operator	2017	2018	2019	2020
Euro Garages	97	97	86	96
Extra	96	94	89	97
Moto	88	90	90	93
Roadchef	89	93	92	95
Welcome Break	91	93	90	92
Westmorland	98	97	98	97

—●— Euro Garages   —●— Extra   —●— Moto
—●— Roadchef   —●— Welcome Break   —●— Westmorland

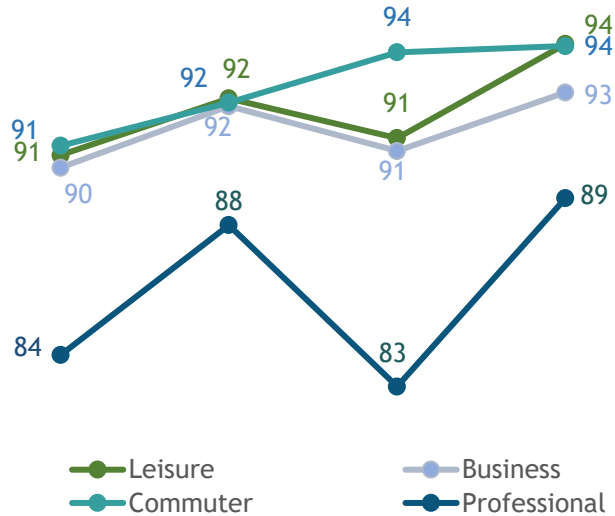Vertical y axis range 80% to 100%

Q7. Overall, how satisfied are you with your experience at these Motorway Services today?
Base (2017/2018/2019/2020,): All MSAs (8692/9,613/11,602/9,804), Euro Garages (150/176/150/196), Extra (453/516/643/551), Moto (3,498/3,895/4,697/3,899), Roadchef (1,785/2,004/2,416/2,001), Welcome Break (2,388/2,662/3,194/2,657), Westmorland (340/360/466/385).
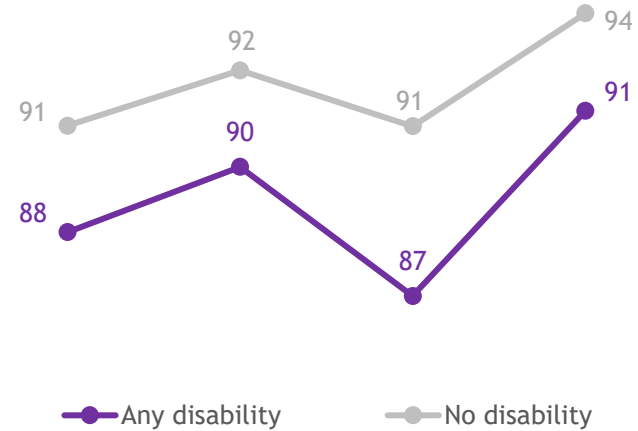
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By visitor type (1)

Overall satisfaction by visitor type (%)

- **94** Commuter
- **94** Leisure
- **93** Business
- **89** Professional

2017: 91, 91, 90, 84
2018: 92, 92, 92, 88
2019: 94, 91, 91, 83
2020: 94, 94, 93, 89

Legend:
- Leisure
- Business
- Commuter
- Professional

NB scale does not start at 0

2017   2018   2019   2020

Overall satisfaction by disability (%)

No disability: 91, 92, 91, 94
Any disability: 88, 90, 87, 91

Legend:
- Any disability
- No disability

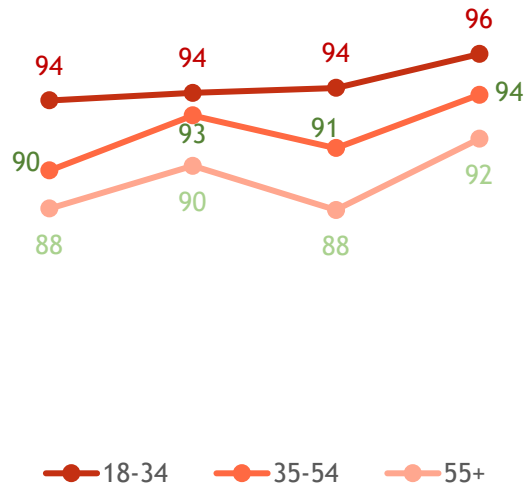NB scale does not start at 0

2017   2018   2019   2020

Q7. Overall, how satisfied are you with your experience at these Motorway Services today?

Base (2017, 2018, 2019, 2020): Leisure (5,594/ 6,254/7,270/6,357); Commuter (617/634/585/712); Business (1,534/1,745/2,494/1,863); Professional (947/980/1,253/872); Any disability (517/566/761/569); No disability (7,304/8,923/10,590/9,173).

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By visitor type (2)

Overall satisfaction by age (%)

94 — 94 — 94 — 96

90 — 93 — 91 — 94

88 — 90 — 88 — 92

- 18-34
- 35-54
- 55+

NB scale does not start at 0

2017   2018   2019   2020

Overall satisfaction by gender (%)
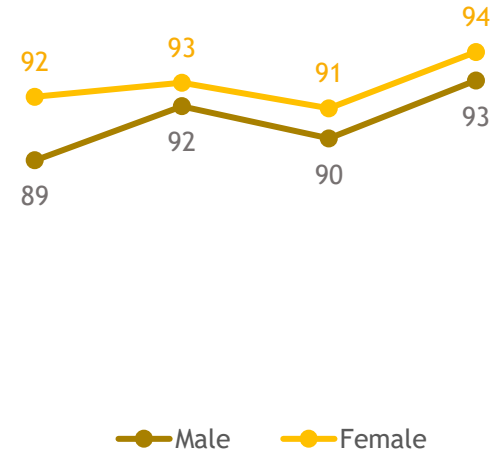
92 — 93 — 91 — 94

89 — 92 — 90 — 93

- Male
- Female

NB scale does not start at 0

2017   2018   2019   2020

Q7. Overall, how satisfied are you with your experience at these Motorway Services today?
Base (2017, 2018, 2019, 2020): 18-34 (1,892/2,012/2,341/2,118); 35-54 (3,419/3,625/4,454/3,792); 55+ (3,348/3,924/ 4,781/3,873); Male (5,389/5,823/7,310/5,951); Female (3,303/3,790/4,292/3,853).

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Mood and impressions

Mood on arrival and exit
Overall impression of the MSA

Mood on arrival and exit (1)

When arriving at the MSAs just over half of visitors (52%) were feeling happy or relaxed, this increased to 85% after their experience at the MSA, a 33 percentage point increase.

2020 all MSAs (% selecting mood)

Mood on arrival

Mood on exit

33

19

21

18

3

6

Change in positive mood +33

54

31

10

3

Change in negative mood -22

Happy Relaxed Indifferent Tired Frustrated Stressed
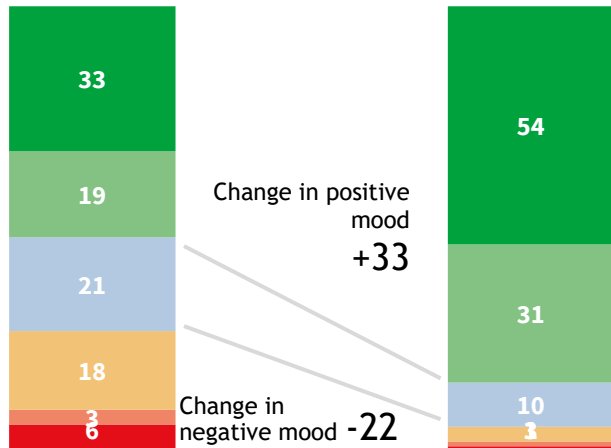
Images © Transport Focus

2020 change in emotion

MSA	Change in positive mood (% Happy or relaxed)	Change in negative mood (% Tired, frustrated or stressed)
Euro Garages	+30	-14
Extra	+29	-19
Moto	+34	-22
Roadchef	+34	-22
Welcome Break	+33	-22
Westmorland	+26	-14

Q3. Which of these images best describes your mood when you first arrived at these Motorway Services today?
Q17. Which of these images best describes your current mood after your visit?

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Base (2020): EuroGarages (196), Extra (551), Moto (3,901), Roadchef (2,002), Welcome Break (2,658), Westmorland (385).

Mood and impressions

Mood on arrival and exit (2)

All MSAs: mood on arrival (%)

Leisure
- 2019: 59 | 24
- 2020: 54 | 25

Business
- 2019: 55 | 25
- 2020: 47 | 30

Commuter
- 2019: 51 | 30
- 2020: 47 | 32

Professional
- 2019: 50 | 29
- 2020: 54 | 26

Positive mood increase on exit (percentage points)

Leisure
- 2019: 29
- 2020: 32

Business
- 2019: 30
- 2020: 36

Commuter
- 2019: 35
- 2020: 34

Professional
- 2019: 34
- 2020: 28

Negative mood decrease on exit (percentage points)

Leisure
- 2019: 19
- 2020: 21

Business
- 2019: 21
- 2020: 25

Commuter
- 2019: 22
- 2020: 23

Professional
- 2019: 23
- 2020: 19

■ Happy or relaxed
■ Tired, frustrated or stressed

Q3. Which of these images best describes your mood when you first arrived at these Motorway Services today?
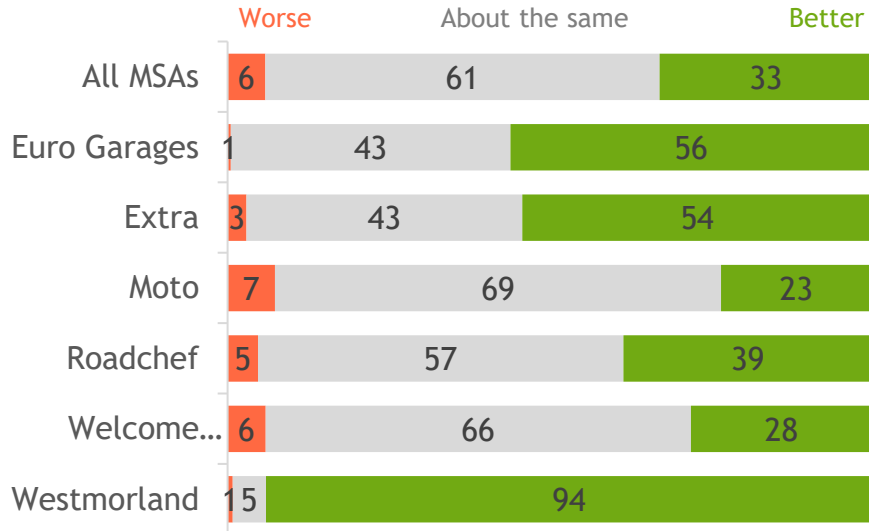Q17. Which of these images best describes your current mood after your visit?
Base (2019/2020): Leisure (7,275/6,360), Business (2,494/1,863), Commuter (586/713), Professional (1,254/872).

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Overall impressions (1)

A third of visitors said the MSA they visited was better than most motorway services. 94% of Westmorland's visitors stated the MSA was better than others.

Less than a tenth of visitors (8%) thought the MSA has 'loads of wow factor'. This figure increases to 62% for Westmorland visitors but halves for Welcome Break visitors at 4%.
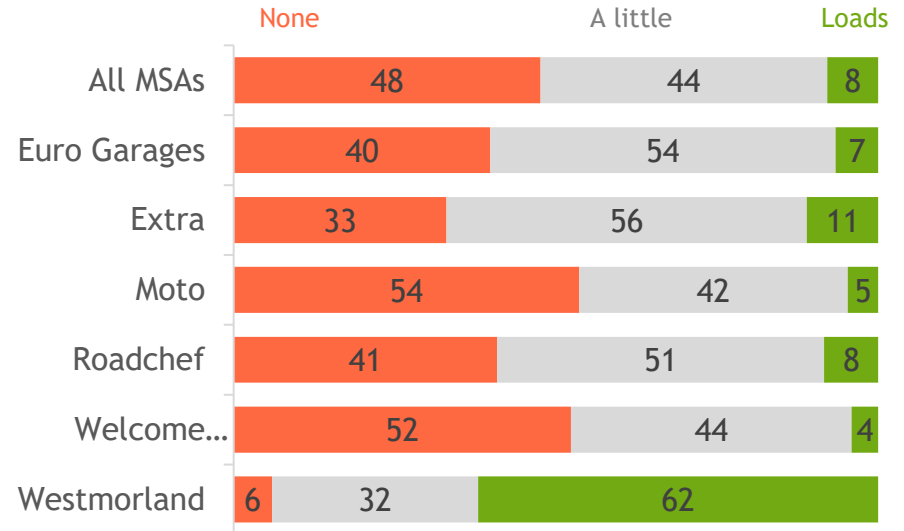
Compared with other MSAs (%)

Worse — About the same — Better

	Worse	About the same	Better
All MSAs	6	61	33
Euro Garages	1	43	56
Extra	3	43	54
Moto	7	69	23
Roadchef	5	57	39
Welcome…	6	66	28
Westmorland	15		94

The wow factor (%)

None — A little — Loads

	None	A little	Loads
All MSAs	48	44	8
Euro Garages	40	54	7
Extra	33	56	11
Moto	54	42	5
Roadchef	41	51	8
Welcome…	52	44	4
Westmorland	6	32	62

Q18. Thinking about << MSA name>> Services generally, would you say that…

Base (2020): EuroGarages (196), Extra (551), Moto (3,901), Roadchef (2,002), Welcome Break (2,658), Westmorland (385).

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Overall impressions (2)

The majority of visitors (85%) stated the MSA they visited met expectations and 10% felt it exceeded expectations.
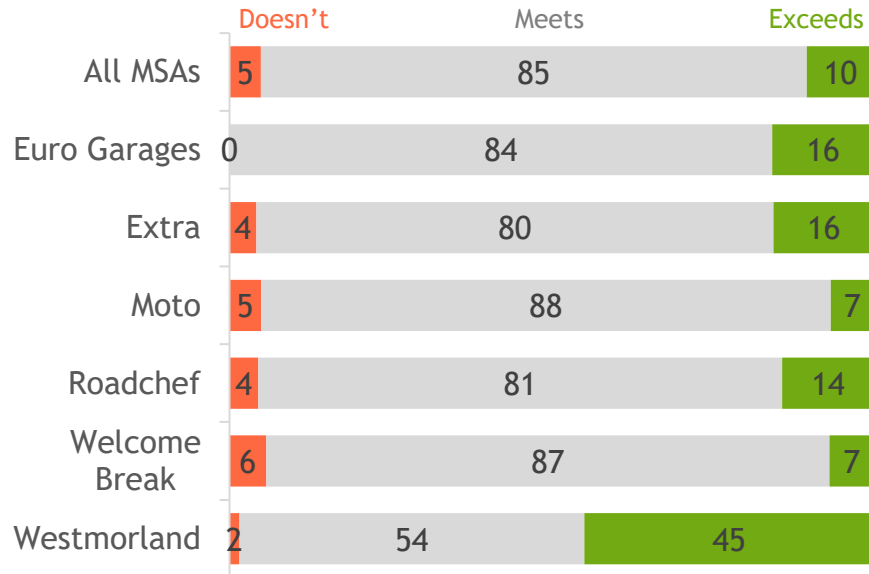
Nearly a fifth of visitors (18%) thought the MSA had 'a great range of facilities'. Euro Garages (26%), Extra (32%), Roadchef (20%) and Westmorland (67%) all index higher.

Meeting expectations (%)

	Doesn't	Meets	Exceeds
All MSAs	5	85	10
Euro Garages	0	84	16
Extra	4	80	16
Moto	5	88	7
Roadchef	4	81	14
Welcome Break	6	87	7
Westmorland	2	54	45

Range of facilities (%)

	Inadequate	About the same	Great
All MSAs	5	77	18
Euro Garages	1	73	26
Extra	4	63	32
Moto	5	82	13
Roadchef	5	75	20
Welcome Break	5	80	15
Westmorland	1	32	67

Q18. Thinking about << MSA name>> Services generally, would you say that…
Base (2020): EuroGarages (196), Extra (551), Moto (3,901), Roadchef (2,002), Welcome Break (2,658), Westmorland (385).
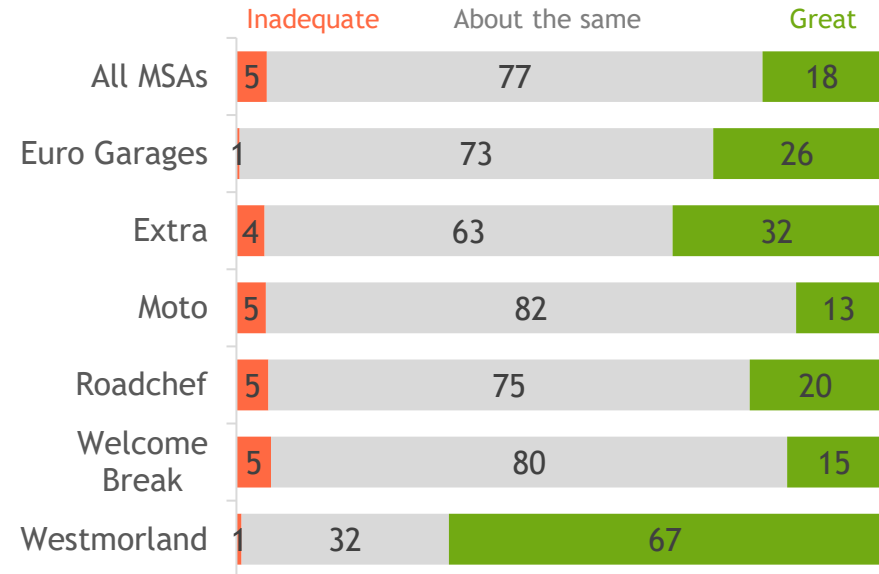
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Stopping at the MSA

Choosing the MSA before setting off
By visitor type
Reasons for visiting an MSA
Influence of brands on deciding to stop
Drive and dwell time

Choosing the MSA before setting off

Before setting out on their journey, 45% of visitors had specifically intended to stop at the MSA they visited. Visitors going to Westmorland and Extra services are the most likely to have planned their visit.

Whether decided to stop at particular MSA before setting off (Yes %)
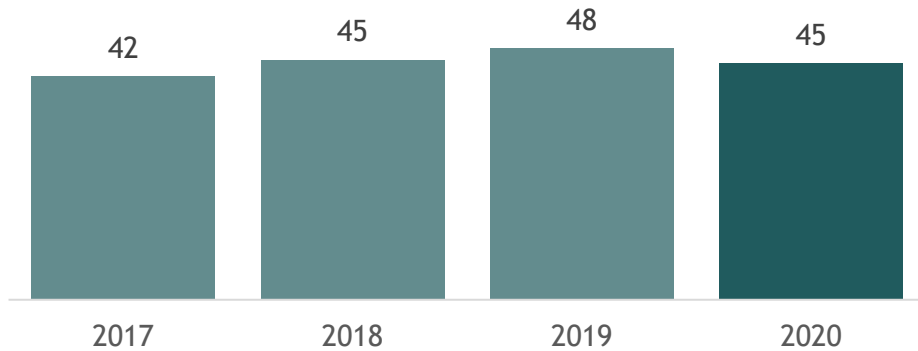
Whether decided to stop at particular MSA before setting off (Yes %)
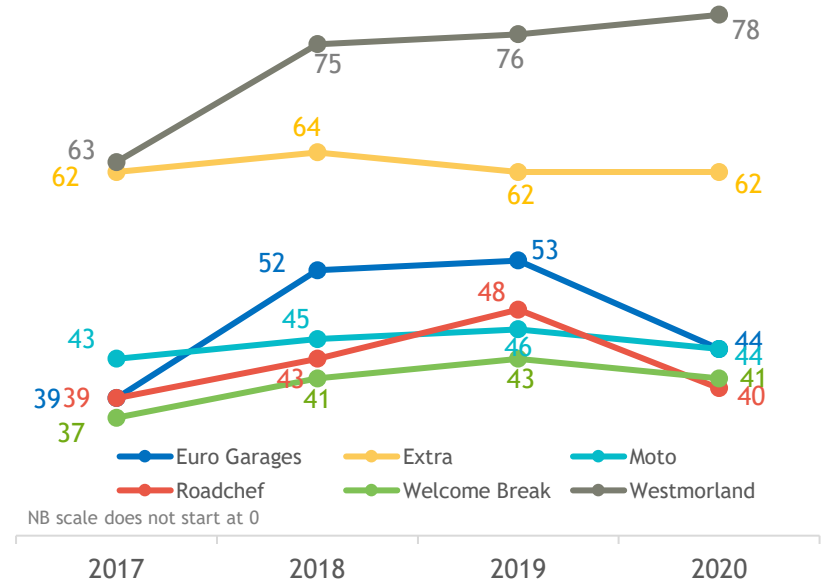
NB scale does not start at 0

Euro Garages   Extra   Moto
Roadchef   Welcome Break   Westmorland

Q9. Did you intend to stop at these particular Motorway Services before you set off today?
Base (2017/2018/2019/2020,): Euro Garages (150/176/185/194), Extra (442/511/639/543), Moto (3,386/3,819/4,596/3,849), Roadchef (1,737/1,964/2,340/1,964), Welcome Break (2,290/2,593/3,074/2,593), Westmorland (326/349/462/378).

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Choosing the MSA before setting off by visitor type (1)

Whether decided to stop at particular MSA before setting off by visitor type (%)

Whether decided to stop at particular MSA before setting off by disability (%)

Leisure — Business — Commuter — Professional

Any disability — No disability
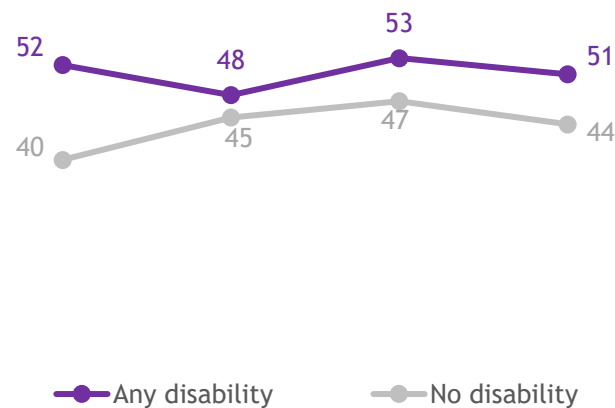
NB scale does not start at 0

Q9. Did you intend to stop at these particular Motorway Services before you set off today?

Base (2017/2018/2019/2020,): Leisure (5,297/6,047/6,962/6,184); Commuter (617/ 634/586/713); Business (1,536/1,749/2,494 /1,863); Professional (948/982/1,254/872); Any disability (471/539/700/545); No disability (7,066/8,752/10,356/9,026).

Choosing the MSA before setting off by visitor type (2)

Whether decided to stop at particular
MSA before setting off by age (%)

49   49   54
                        51

41   45   46
      39   39   42
                  38
33

NB scale does not start at 0

●—— 18-34   ●—— 35-54   ●—— 55+

2017   2018   2019   2020

Whether decided to stop at particular
MSA before setting off by gender (%)
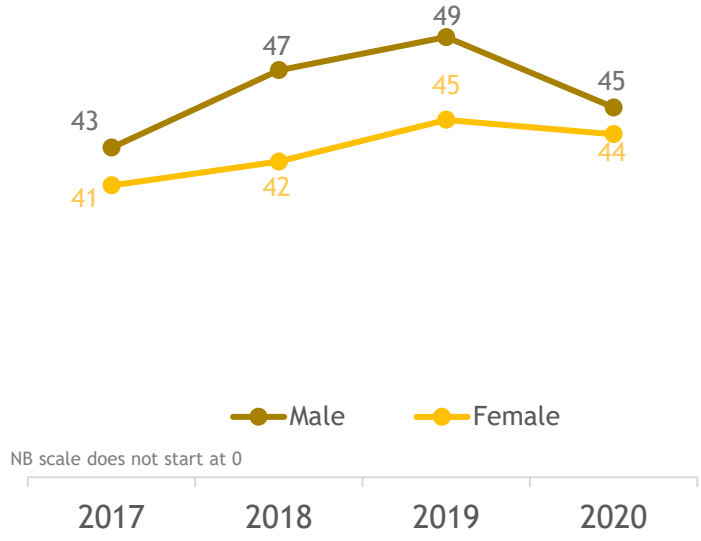
            49
      47   45
43
            45
      42   44
41
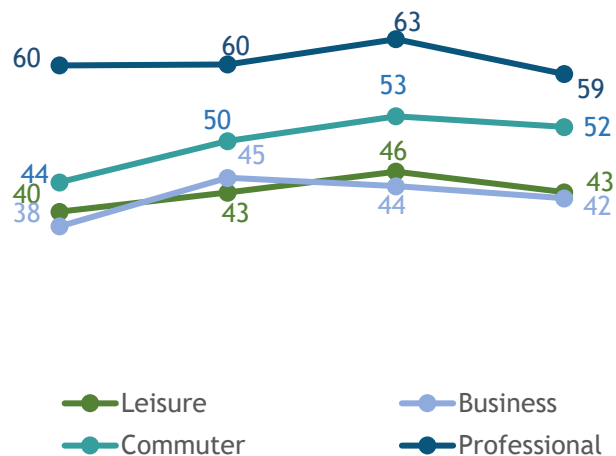
NB scale does not start at 0

●—— Male   ●—— Female

2017   2018   2019   2020

Q9. Did you intend to stop at these particular Motorway Services before you set off today?
Base (2017, 2018, 2019, 2020): 18-34 (1,853/1,970/2,300/2,090); 35-54 (3,333/3,570/4,408/3,746); 55+ (3,180/3,820/ 4,563/3,775); Male (5,217/5,720/7,174/5,851); Female (3,181/3,692/4,122/3,781).

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Reasons for visiting an MSA

The main reason for stopping at an MSA in 2020 was to use the toilet facilities (35%), with getting food and drink the second most stated reason for the visit (30%).
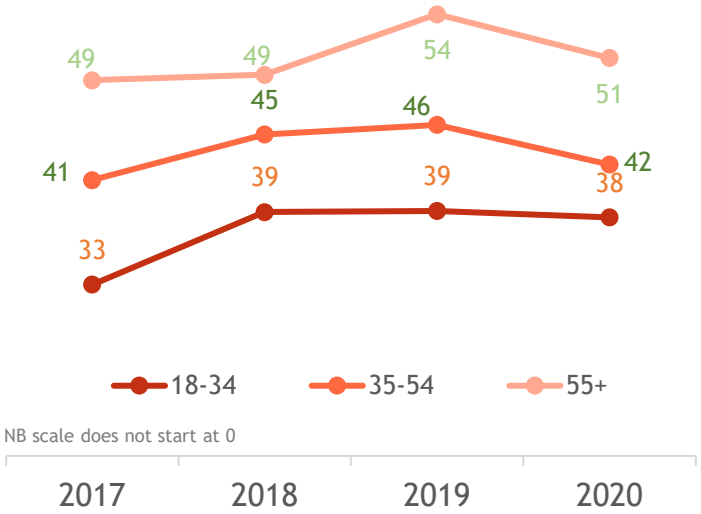
Main reason for deciding to stop

Get food/drink
- 32%
- 37%
- 30%

Break from driving
- 32%
- 28%
- 26%

Toilet break
- 27%
- 25%
- 35%

Any other reason*
- 5%
- 6%
- 9%

Legend:
- Yes 2018
- Yes 2019
- Yes 2020
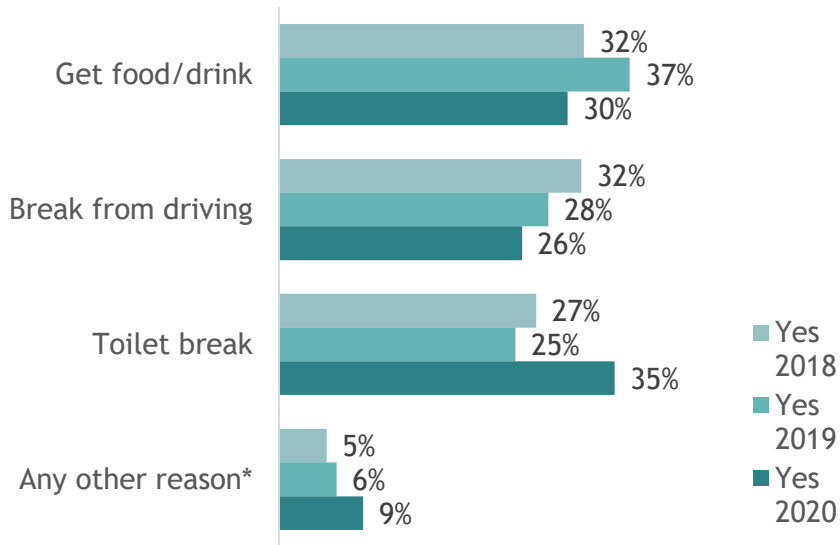
Main reason for deciding to stop amongst those planning to stop at particular MSA (2020)

- Get food/drink — 35%
- Break from driving — 27%
- Toilet break — 25%
- Any other reason* — 13%
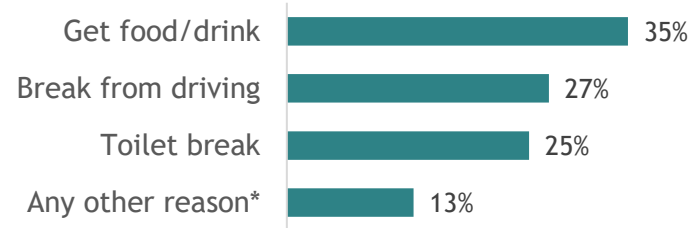
Main reason for deciding to stop amongst those not planning to stop at particular MSA (2020)

- Get food/drink — 26%
- Break from driving — 24%
- Toilet break — 44%
- Any other reason* — 5%
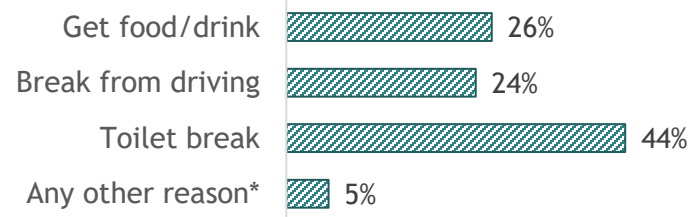
Q8. What was the main reason for deciding to stop here? *Any other reason includes: Driving hours were nearly complete, To have a meeting here, To buy something, Fuel stop, To stay at a hotel here, or Other.
Base (2020): Planned to stop at particular MSA (4,312); Did not plan to stop at a particular MSA (5,320).

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Influence of brands on decisions

Any brand influenced decision to stop (by operator)

Euro Garages
- 2018: 37%
- 2019: 30%
- 2020: 31%

Extra
- 2018: 41%
- 2019: 41%
- 2020: 43%

Moto
- 2018: 35%
- 2019: 33%
- 2020: 32%

Roadchef
- 2018: 31%
- 2019: 30%
- 2020: 29%

Welcome Break
- 2018: 27%
- 2019: 27%
- 2020: 22%

Westmorland
- 2018: 22%
- 2019: 49%
- 2020: 30%

Legend: ■ 2018 ■ 2019 ■ 2020
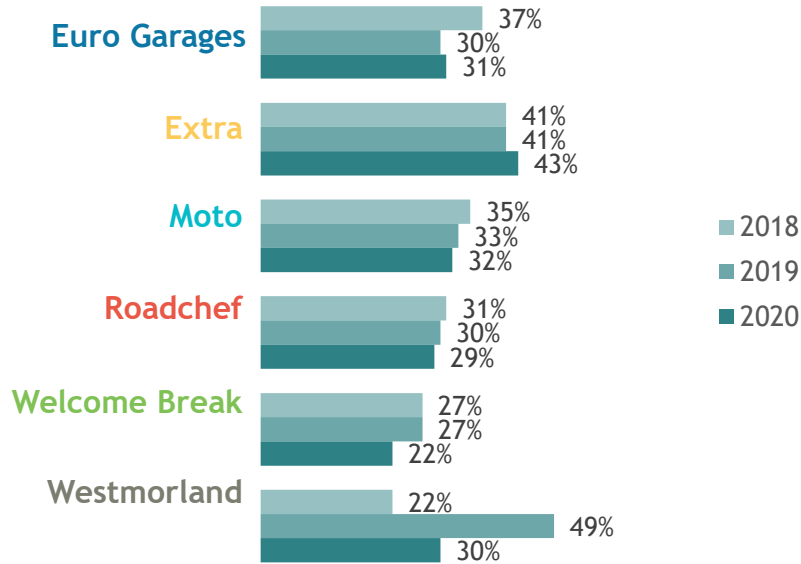
Brand influenced decision to stop* (year trend of top four brands)

Costa Coffee
- 2018: 32%
- 2019: 29%
- 2020: 26%

McDonald's
- 2018: 16%
- 2019: 15%
- 2020: 17%

Marks & Spencer
- 2018: 13%
- 2019: 10%
- 2020: 14%

Greggs
- 2018: 9%
- 2019: 9%
- 2020: 11%

Legend: ■ 2018 ■ 2019 ■ 2020

*When interpreting this slide please note that not all brands are available at all MSAs
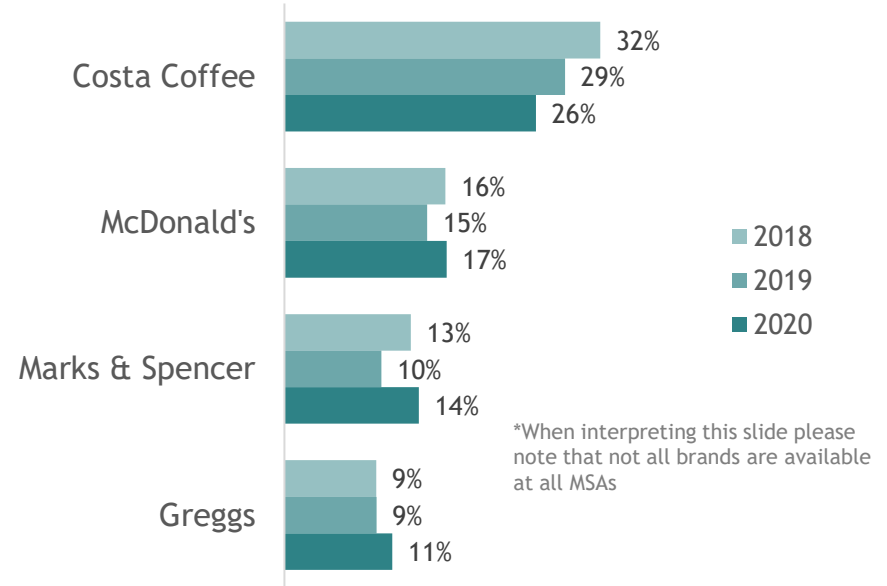
Q10. Did any specific brands being here make you more inclined to stop at these Motorway Services?

Base (2018, 2019, 2020,): Euro Garages (176/185/194), Extra (511/639/543), Moto (3,819/4,596/3,849), Roadchef (1,964/2,340/1,964), Welcome Break (2,593/3,074/2,593), Westmorland (349/462/378)

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Drive and dwell time

Visitors to Westmorland services are most likely to stay for the longest period of time with a stay time of 25 minutes. Euro Garages, Moto and Welcome Break have the shortest stopping time at 15 minutes.

Time on road before stopping and dwell time at MSA*
(all visitors, minutes, median values)

MSA	Drive time	Dwell time
All MSA	90	15
Euro Garages	60	15
Extra	75	20
Moto	90	15
Roadchef	105	20
Welcome Break	105	15
Westmorland	90	25

Drive time is first bar : Dwell time is second bar
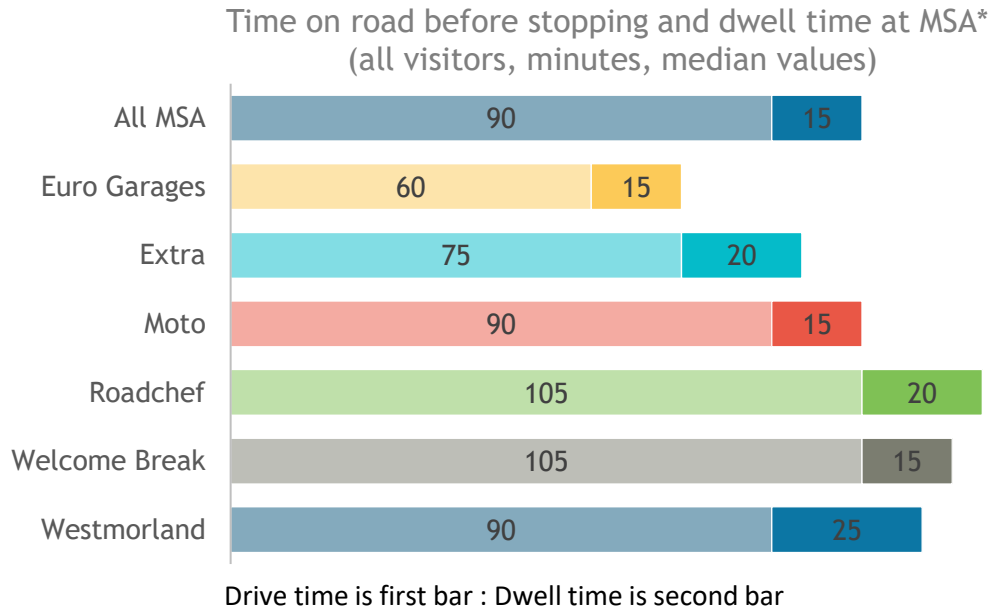
*Time on road before stopping particpants offered choices in 15 minute steps, and dwell time at MSA choices in 5 minute steps

Q3.How long is it since you set off, or last took a break from driving? (excluding the time spent here)/ Q5. How long have you spent here today, after parking?/Q2. How long will your whole journey today take (excluding the time spent here)?
Base (2020): Euro Garages (196), Extra (551), Moto (3,901), Roadchef (2,002), Welcome Break (2,658), Westmorland (385)

WATERMELON

Rating the arrival

The approach
The car park
Impression of the building

The approach

All MSAs ratings

Approach signs
(% very or fairly good)

	2017	2018	2019	2020
Very good	60	60	62	56
Fairly good	31	31	30	33
Total	**92**	**90**	**92**	**89**

Slip road
(% very or fairly good)

	2017	2018	2019	2020
Very good	59	57	54	55
Fairly good	30	31	32	33
Total	**89**	**88**	**86**	**87**

MSA road surfaces
(% very or fairly good)

	2017	2018	2019	2020
Very good		40	42	38
Fairly good		37	36	38
Total		**77**	**77**	**76**

■ Very good   ■ Fairly good

2020 ratings by operator (% very or fairly good)

Approach signs
- Euro Garages: 94
- Extra: 93
- Moto: 88
- Roadchef: 89
- Welcome Break: 89
- Westmorland: 95

Slip road
- Euro Garages: 92
- Extra: 92
- Moto: 87
- Roadchef: 86
- Welcome Break: 87
- Westmorland: 94

MSA road surfaces
- Euro Garages: 94
- Extra: 84
- Moto: 74
- Roadchef: 78
- Welcome Break: 72
- Westmorland: 94

NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
■ Welcome Break   ■ Westmorland

Q12. Thinking about your arrival at these Motorway Services today, please rate the following:

Bases in chart order: 2020: All MSA (9352/9489/9445), Euro Garages (193/193/192), Extra (528/529/540), Moto (3717/3770/3754), Roadchef (1916/1954/1938), Welcome Break (2524/2558/2537), Westmorland (368/376/375)

WATERMELON

The car park

All MSAs ratings

2020 ratings by operator
(% very or fairly good)

Car park layout
90
86
85
86
83
92

Vehicle safety
97
93
91
92
90
95

NB scale does not start at 0

Car park layout
(% very or fairly good)

2017	2018	2019	2020
87	85	83	85
55	51	49	50
31	34	34	35

Vehicle safety
(% very or fairly good)

2017	2018	2019	2020
93	92	91	91
61	58	58	58
32	34	33	34

■ Very good   ■ Fairly good

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
■ Welcome Break   ■ Westmorland

Q12. Thinking about your arrival at these Motorway Services today, please rate the following:

Bases in chart order: 2020: All MSA (9529/9506), Euro Garages (193/193), Extra (537/536), Moto (3794/3778), Roadchef (1959/1955), Welcome Break (2561/2559), Westmorland (376/376)

WATERMELON

Impression of the building

All MSAs ratings

2020 ratings by operator (% very or fairly good)

Walk to the building
(% very or fairly good)

Impression of the outside
(% very or fairly good)
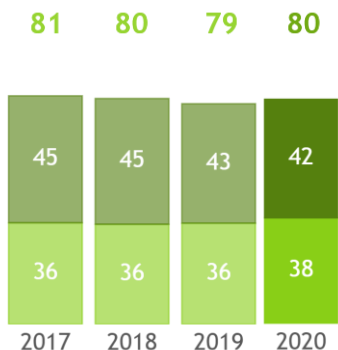
Impression of the inside
(% very or fairly good)
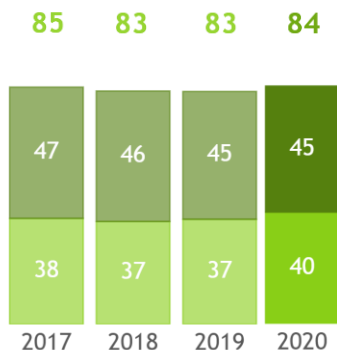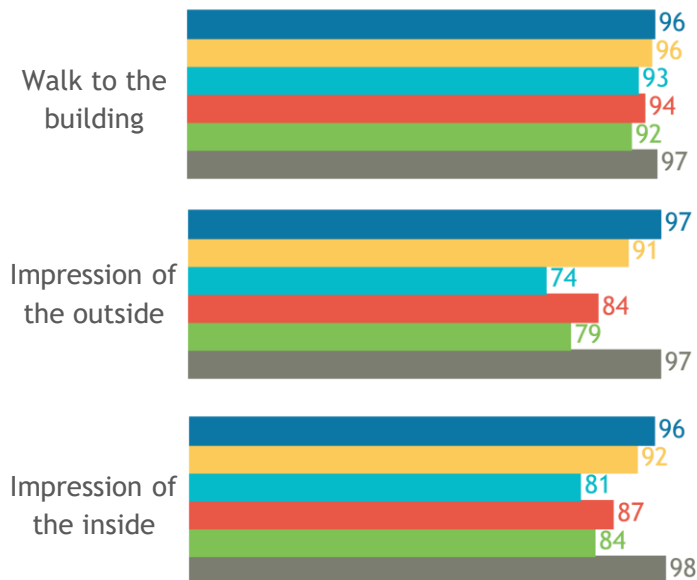
Walk to the building:
	2017	2018	2019	2020
Very good	64	61	63	62
Fairly good	30	32	30	31
Total	94	93	93	93

Impression of the outside:
	2017	2018	2019	2020
Very good	45	45	43	42
Fairly good	36	36	36	38
Total	81	80	79	80

Impression of the inside:
	2017	2018	2019	2020
Very good	47	46	45	45
Fairly good	38	37	37	40
Total	85	83	83	84

■ Very good   ■ Fairly good

Walk to the building — Euro Garages 96, Extra 96, Moto 93, Roadchef 94, Welcome Break 92, Westmorland 97

Impression of the outside — Euro Garages 97, Extra 91, Moto 74, Roadchef 84, Welcome Break 79, Westmorland 97

Impression of the inside — Euro Garages 96, Extra 92, Moto 81, Roadchef 87, Welcome Break 84, Westmorland 98
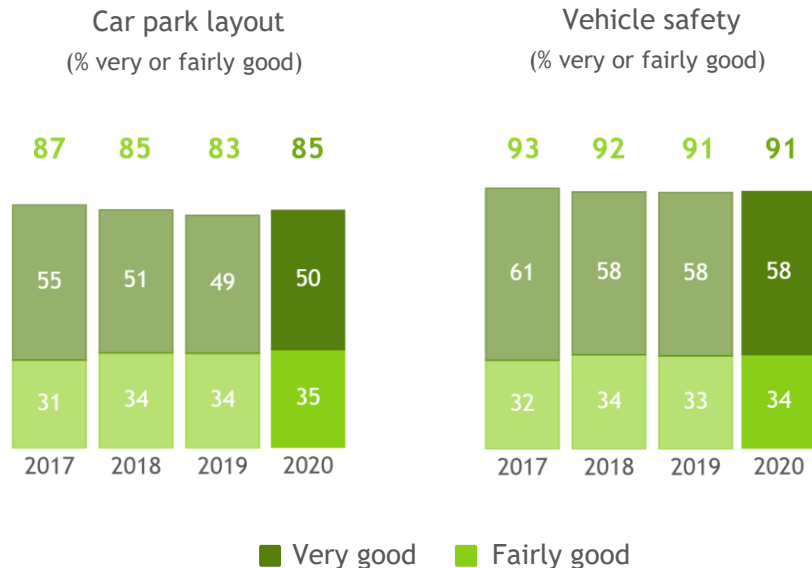
NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
■ Welcome Break   ■ Westmorland

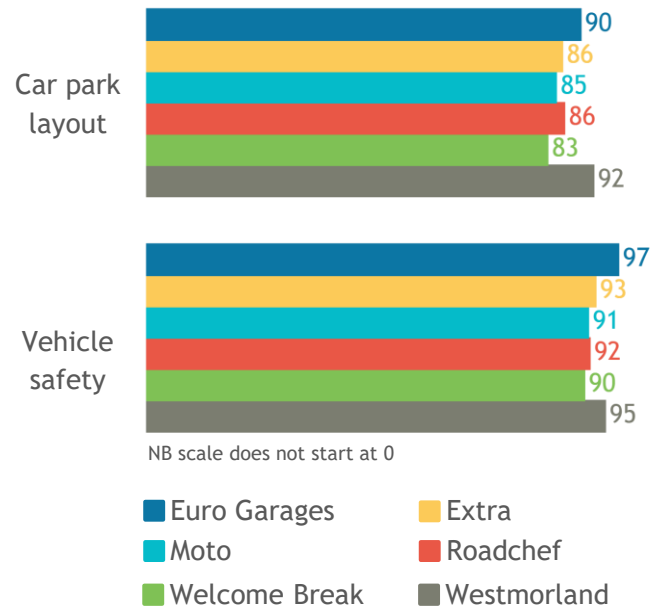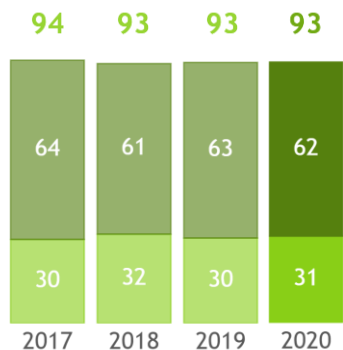Q12. Thinking about your arrival at these Motorway Services today, please rate the following:

Bases in chart order: 2020: All MSA (9587/9733/9787), Euro Garages (194/194/196),   Extra (541/549/550), Moto (3818/3860/3889), Roadchef (1962/1991/2001), Welcome Break (2583/2640/2651), Westmorland (378/384/385)

WATERMELON

Proportion using MSA facilities

Proportion using MSA facilities

Facilities used during MSA visit (%)

Legend: 2017, 2018, 2019, 2020

Facility	2017	2018	2019	2020
Used toilets	77	73	69	72
Had MSA food/drink	50	52	52	35
Bought food/drink to eat later	30	22	20	29
Bought convenience items	13	10	9	11
Rest / Eat own food	5	5	8	6
Grocery shopping	5	4	4	6
Charge vehicle	0	0	1	1
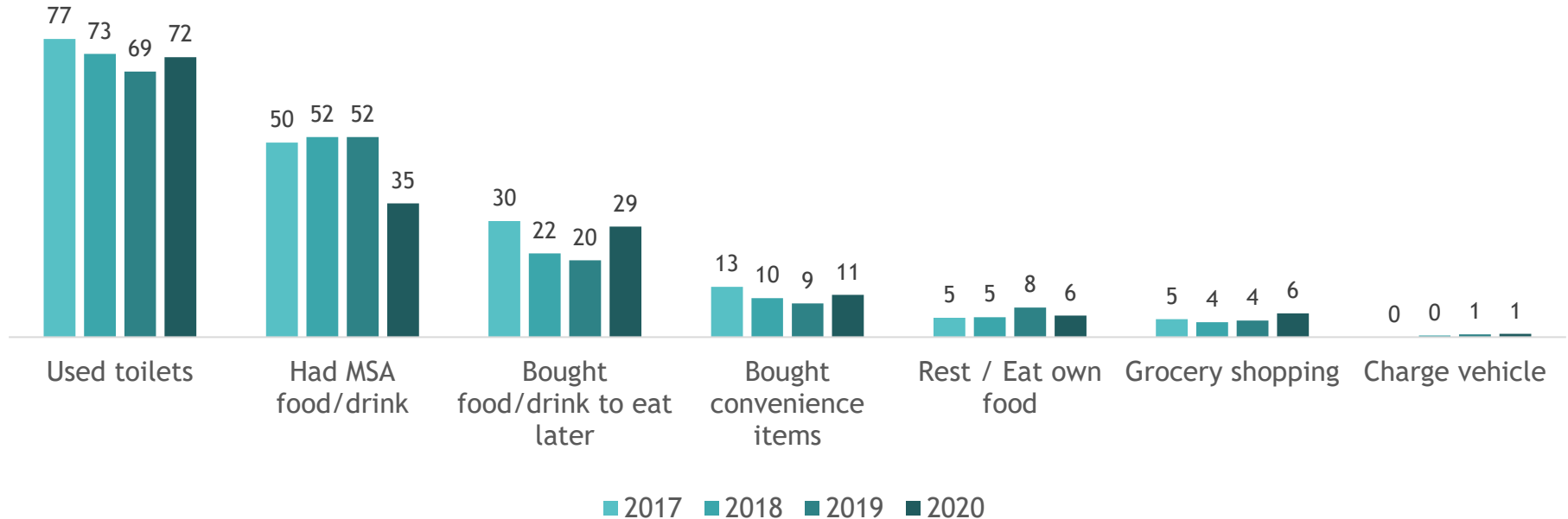
Q13. Which of the following have you done here today? Please select all which apply
Base – All MSAs 2017: 8,701, 2018: 9,626, 2019: 11,609, 2020: 9,808

WATERMELON

Ratings of the facilities used

Toilets
Food and drink to eat in
Food and drink for the car
Resting and eating own food
Convenience items
HGV facilities

Toilet facilities

All MSAs ratings

Availability
(% very or fairly good)

	2017	2018	2019	2020
Total	92	92	93	93
Very good	64	65	69	68
Fairly good	27	28	25	26

Cleanliness
(% very or fairly good)

	2017	2018	2019	2020
Total	90	89	89	89
Very good	60	60	60	61
Fairly good	29	29	28	29

Quality of fixtures
(% very or fairly good)

	2017	2018	2019	2020
Total	82	81	82	82
Very good	50	50	52	49
Fairly good	33	31	30	32

■ Very good ■ Fairly good

2020 ratings by operator (% very or fairly good)

	Euro Garages	Extra	Moto	Roadchef	Welcome Break	Westmorland
Availability	99	92	92	97	92	97
Cleanliness	97	90	89	94	85	95
Quality of fixtures	96	83	78	87	79	95

NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
■ Welcome Break ■ Westmorland

Q16: You said that you used the toilets, please rate ... using the scale below

Bases in chart order: 2020: All MSA (6685/6690/6670), Euro Garages (116/116/116), Extra (297/297/295), Moto (2550/2553/2547), Roadchef (1455/1457/1449), Welcome Break (1923/1923/1920), Westmorland (288/288/287)

WATERMELON

Food and drink to eat in: where they bought

Eat in customers satisfied (%)
95

Top 3 brands bought from (%)*
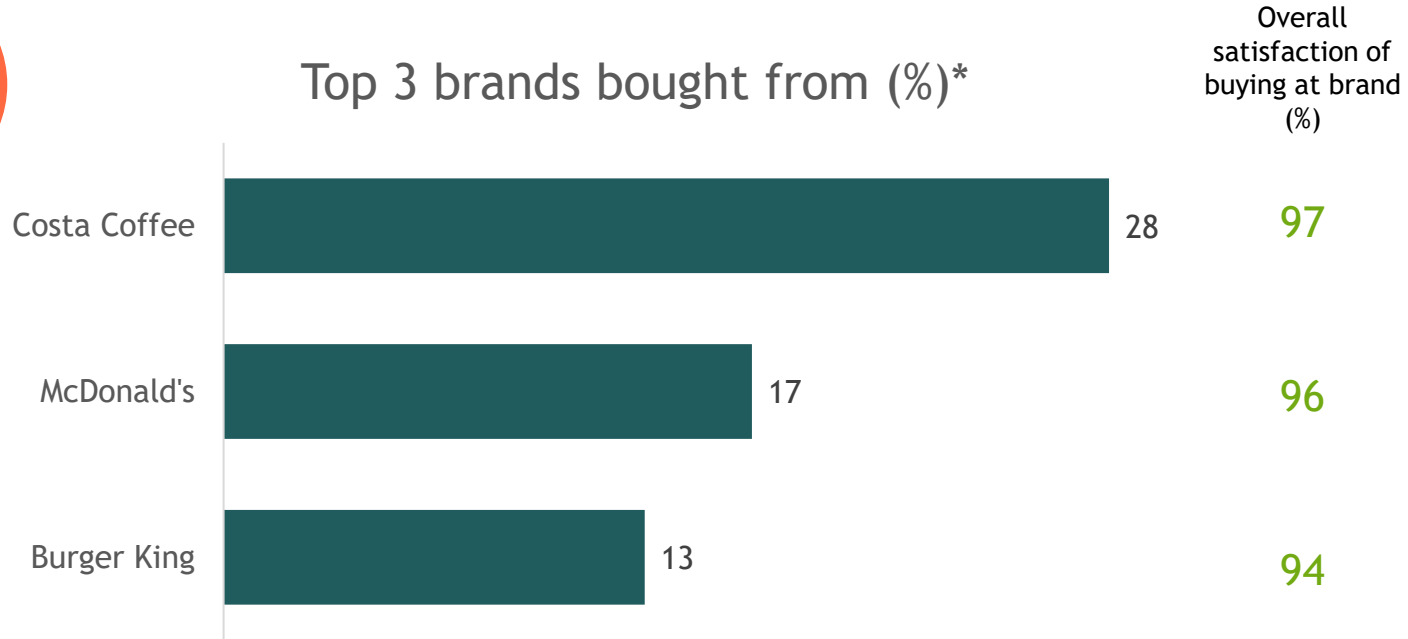
Overall satisfaction of buying at brand (%)

Brand	Value	Satisfaction
Costa Coffee	28	97
McDonald's	17	96
Burger King	13	94

*When interpreting this slide please note that not all brands are available at all MSAs

Q13. From which brand did you buy the food/drinks you sat down to have today?
Base: Visitors buying food/drink to consume in the MSA: All MSAs (3,388)

WATERMELON

Food and drink bought to eat in the MSA (1)

All MSAs ratings
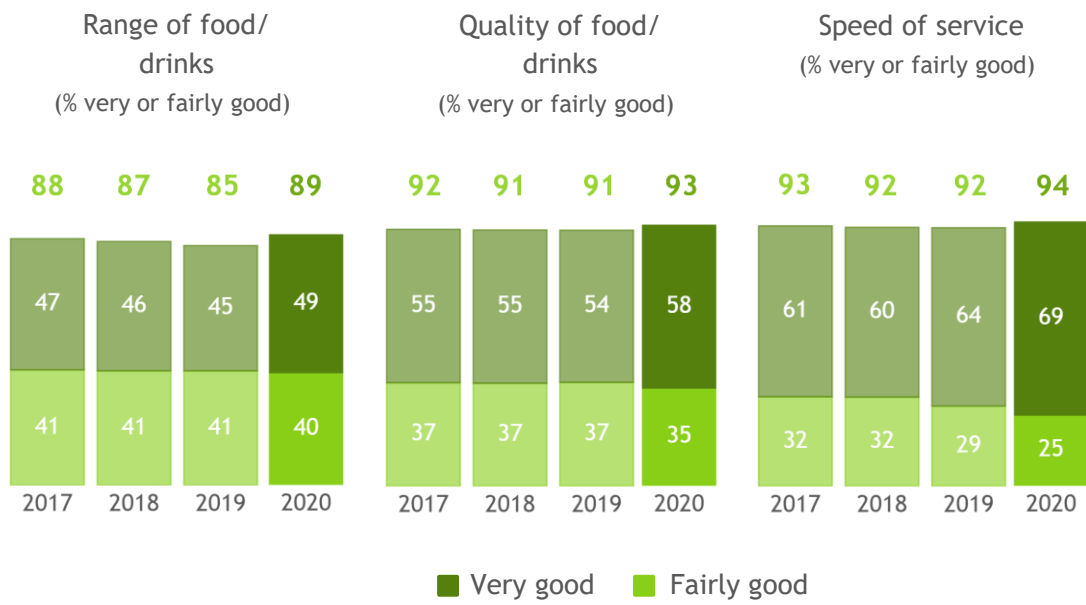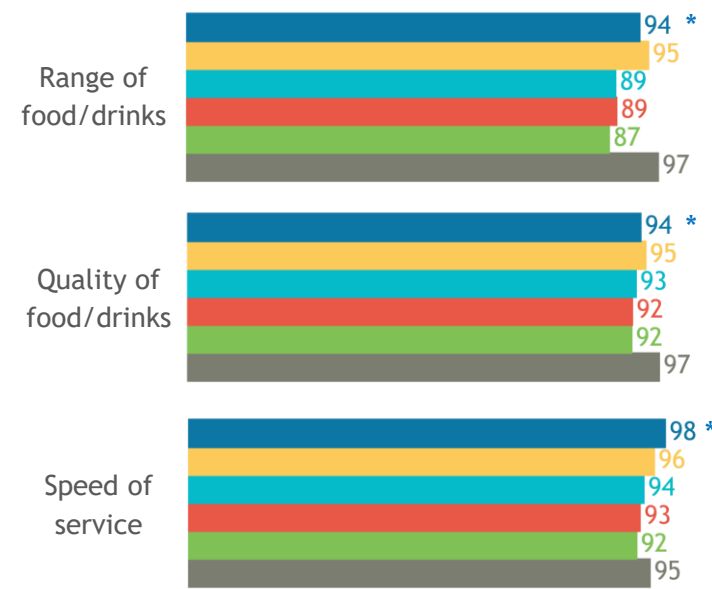
Range of food/drinks
(% very or fairly good)

2017	2018	2019	2020
88	87	85	89
47	46	45	49
41	41	41	40

Quality of food/drinks
(% very or fairly good)

2017	2018	2019	2020
92	91	91	93
55	55	54	58
37	37	37	35

Speed of service
(% very or fairly good)

2017	2018	2019	2020
93	92	92	94
61	60	64	69
32	32	29	25

■ Very good ■ Fairly good

2020 ratings by operator (% very or fairly good)

Range of food/drinks
- Euro Garages: 94 *
- Extra: 95
- Moto: 89
- Roadchef: 89
- Welcome Break: 87
- Westmorland: 97

Quality of food/drinks
- Euro Garages: 94 *
- Extra: 95
- Moto: 93
- Roadchef: 92
- Welcome Break: 92
- Westmorland: 97

Speed of service
- Euro Garages: 98 *
- Extra: 96
- Moto: 94
- Roadchef: 93
- Welcome Break: 92
- Westmorland: 95

NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
■ Welcome Break ■ Westmorland

* Low base, treat data with caution

Q16: You said that you bought food/drink to eat in, please rate .... using the scale below.

Bases in chart order: 2020: All MSA (3384/3386/3381), Euro Garages (62/62/62), Extra (258/258/258), Moto (1197/1197/1194), Roadchef (793/793/792), Welcome Break (838/840/839), Westmorland (189/189/189)

WATERMELON

Food and drink bought to eat in the MSA (2)

All MSAs ratings

Friendliness of staff
(% very or fairly good)

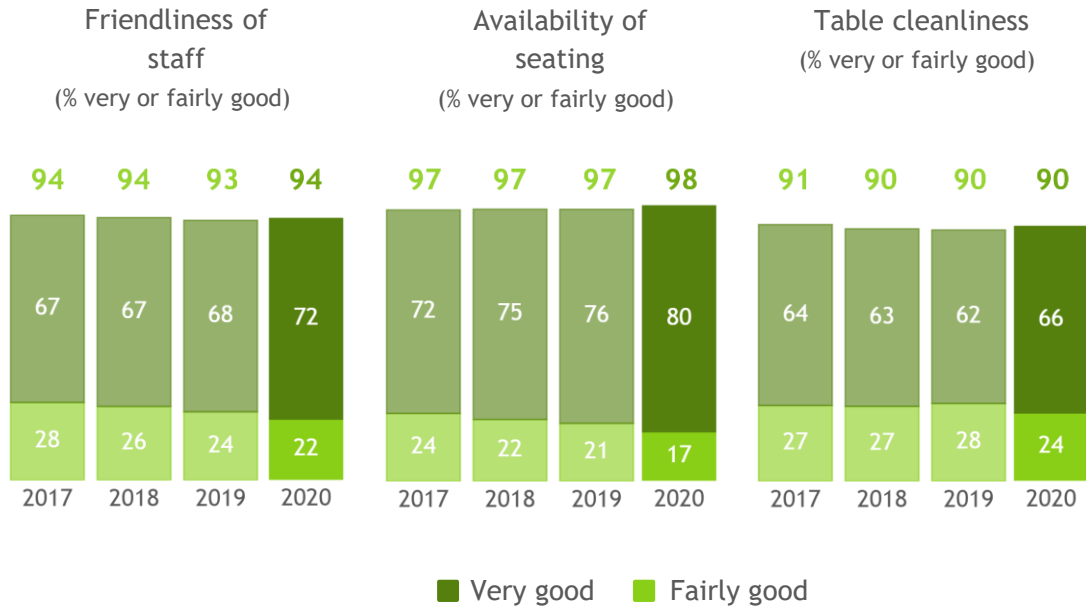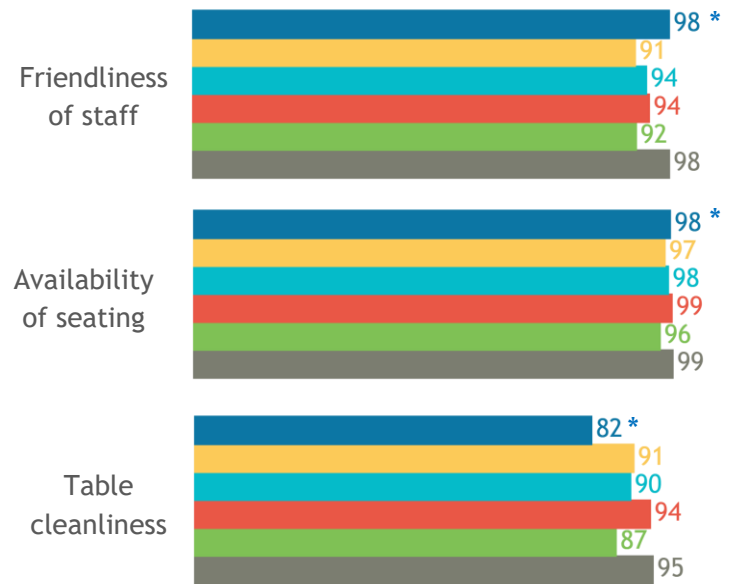|	2017	2018	2019	2020
Total	94	94	93	94
Very good	67	67	68	72
Fairly good	28	26	24	22

Availability of seating
(% very or fairly good)

	2017	2018	2019	2020
Total	97	97	97	98
Very good	72	75	76	80
Fairly good	24	22	21	17

Table cleanliness
(% very or fairly good)

	2017	2018	2019	2020
Total	91	90	90	90
Very good	64	63	62	66
Fairly good	27	27	28	24

■ Very good ■ Fairly good

2020 ratings by operator (% very or fairly good)

Friendliness of staff

Operator	%
Euro Garages	98 *
Extra	91
Moto	94
Roadchef	94
Welcome Break	92
Westmorland	98

Availability of seating

Operator	%
Euro Garages	98 *
Extra	97
Moto	98
Roadchef	99
Welcome Break	96
Westmorland	99

Table cleanliness

Operator	%
Euro Garages	82 *
Extra	91
Moto	90
Roadchef	94
Welcome Break	87
Westmorland	95

NB scale does not start at 0

■ Euro Garages ■ Extra
■ Moto ■ Roadchef
■ Welcome Break ■ Westmorland

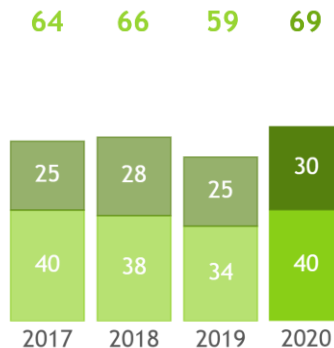Q16: You said that you bought food/drink to eat in, please rate .... using the scale below.

Bases in chart order: 2020: All MSA (3351/3371/3353), Euro Garages (62/62/61), Extra (255/258/257), Moto (1184/1189/1179), Roadchef (784/793/793), Welcome Break (831/835/830), Westmorland (188/187/186)
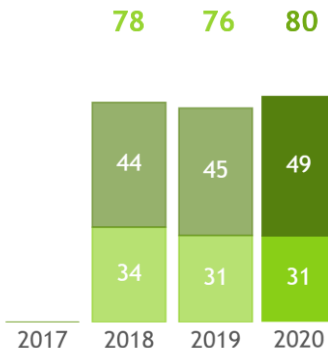
* Low base, treat data with caution

WATERMELON

Food and drink bought to eat in the MSA (3)

All MSAs ratings

Value for money
(% very or fairly good)

2017	2018	2019	2020
64	66	59	69

	2017	2018	2019	2020
Very good	25	28	25	30
Fairly good	40	38	34	40

Wi-Fi quality
(% very or fairly good)

2017	2018	2019	2020
78	76	80

	2017	2018	2019	2020
Very good		44	45	49
Fairly good		34	31	31

■ Very good   ■ Fairly good

2020 ratings by operator (% very or fairly good)

Value for money
- Euro Garages: 82 *
- Extra: 82
- Moto: 68
- Roadchef: 75
- Welcome Break: 58
- Westmorland: 79

Wi-Fi quality
- Euro Garages: NA
- Extra: 70
- Moto: 85
- Roadchef: 83
- Welcome Break: 70
- Westmorland: NA

NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
■ Welcome Break   ■ Westmorland

NA - No available data as base is less than 30

* Low base, treat data with caution

Q16: You said that you bought food/drink to eat in, please rate .... using the scale below.
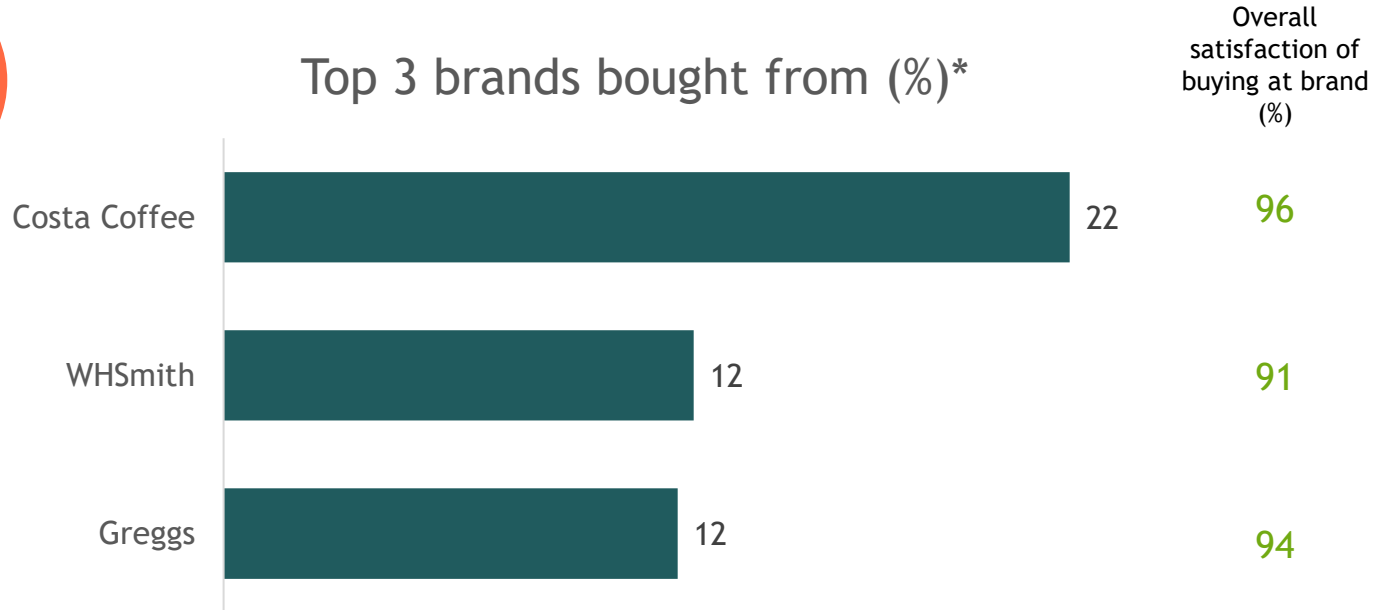
Bases in chart order: 2020: All MSA (3382/675), Euro Garages (62/9), Extra (257/50), Moto (1179/300), Roadchef (792/156), Welcome Break (838/131), Westmorland (188/19)

WATERMELON

Food and drink for the car: where they bought

Eat out customers satisfied (%)
94

Top 3 brands bought from (%)*

Overall satisfaction of buying at brand (%)

Brand	Value	Satisfaction
Costa Coffee	22	96
WHSmith	12	91
Greggs	12	94

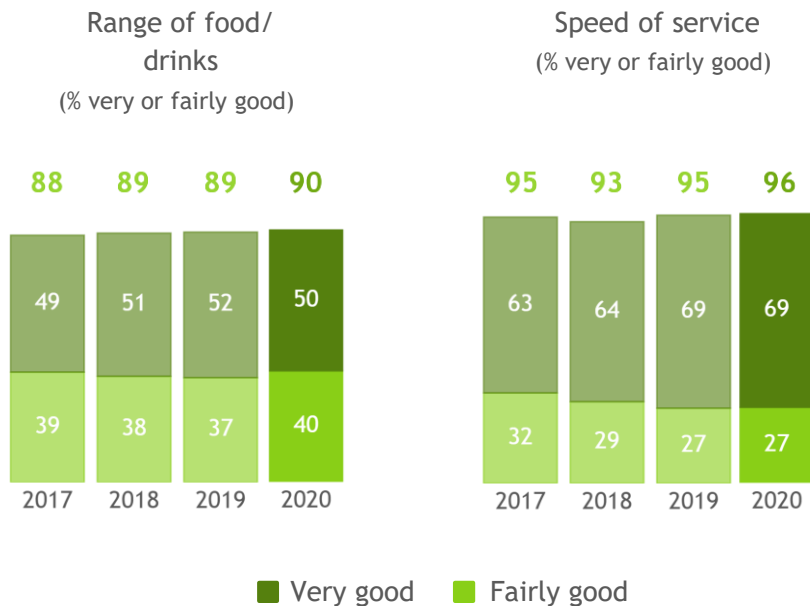*When interpreting this slide please note that not all brands are available at all MSAs

Q13. From which brand did you buy the food/drinks you will have in your vehicle?
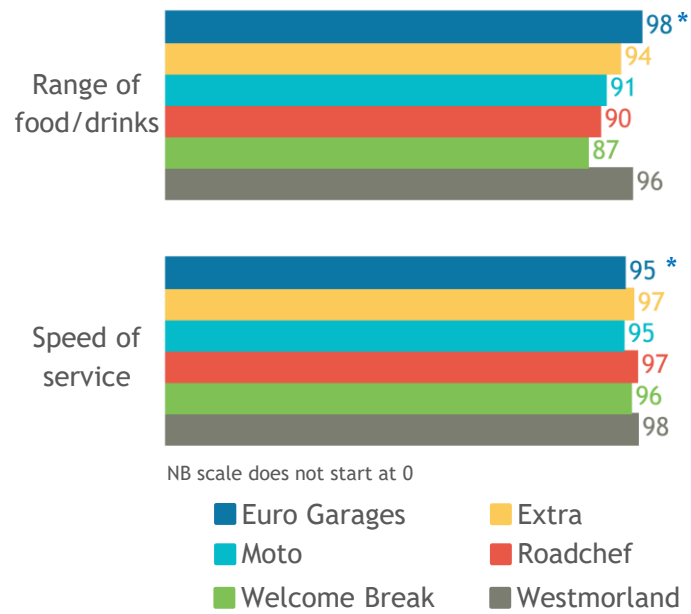Base: Visitors buying food/drink to consume in the car: All MSAs (2,797)

WATERMELON

Food and drink for the car (1)

All MSAs ratings

Range of food/ drinks
(% very or fairly good)

2017	2018	2019	2020
88	**89**	**89**	**90**
49	51	52	50
39	38	37	40

Speed of service
(% very or fairly good)

2017	2018	2019	2020
95	**93**	**95**	**96**
63	64	69	69
32	29	27	27

■ Very good   ■ Fairly good

2020 ratings by operator (% very or fairly good)

Range of food/drinks

Operator	Value
Euro Garages	98 *
Extra	94
Moto	91
Roadchef	90
Welcome Break	87
Westmorland	96

Speed of service

Operator	Value
Euro Garages	95 *
Extra	97
Moto	95
Roadchef	97
Welcome Break	96
Westmorland	98

NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
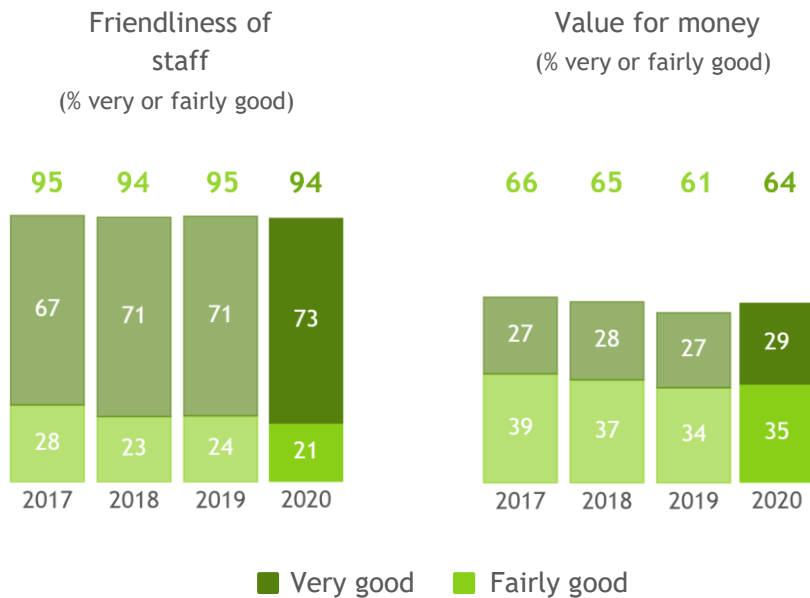■ Welcome Break   ■ Westmorland

* Low base, treat data with caution

Q16: You said that you bought food/drink to have in your vehicle, please rate …. using the scale below.
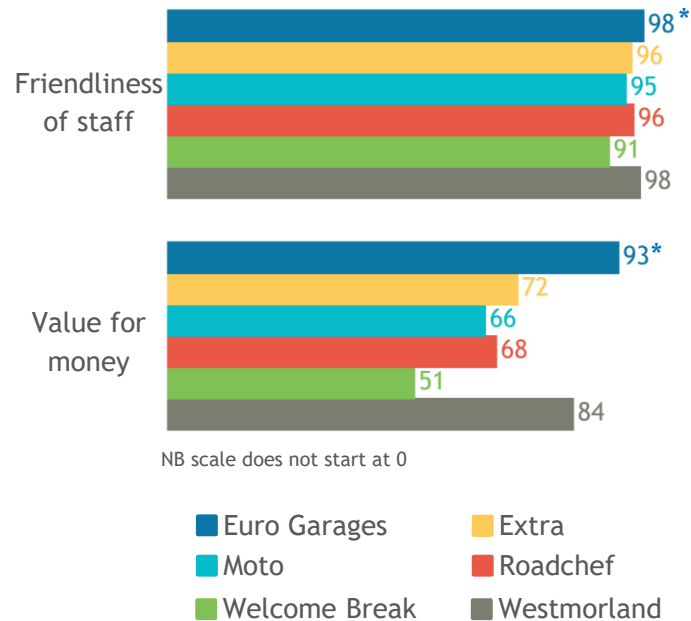
Bases in chart order: 2020: All MSA (2632/2624), Euro Garages (58/58), Extra (147/147), Moto (1166/1163), Roadchef (459/457), Welcome Break (696/694), Westmorland (82/81)

WATERMELON

Food and drink for the car (2)

All MSAs ratings

Friendliness of staff
(% very or fairly good)

Year	Very good	Fairly good	Total
2017	67	28	95
2018	71	23	94
2019	71	24	95
2020	73	21	94

Value for money
(% very or fairly good)

Year	Very good	Fairly good	Total
2017	27	39	66
2018	28	37	65
2019	27	34	61
2020	29	35	64

■ Very good   ■ Fairly good

2020 ratings by operator (% very or fairly good)

Friendliness of staff

Operator	Rating
Euro Garages	98*
Extra	96
Moto	95
Roadchef	96
Welcome Break	91
Westmorland	98

Value for money

Operator	Rating
Euro Garages	93*
Extra	72
Moto	66
Roadchef	68
Welcome Break	51
Westmorland	84

NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
■ Welcome Break   ■ Westmorland

* Low base, treat data with caution

Q16: You said that you bought food/drink to have in your vehicle, please rate .... using the scale below.

Bases in chart order: 2020: All MSA (2589/2634), Euro Garages (58/58), Extra (144/148), Moto (1139/1168), Roadchef (451/458), Welcome Break (691/698), Westmorland (82/80)

WATERMELON

Resting and eating own food (1)

All MSAs ratings
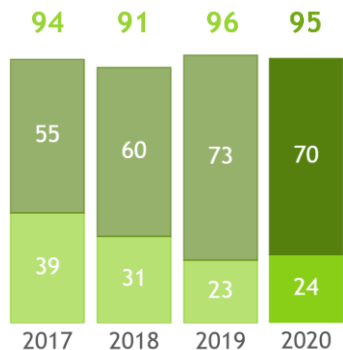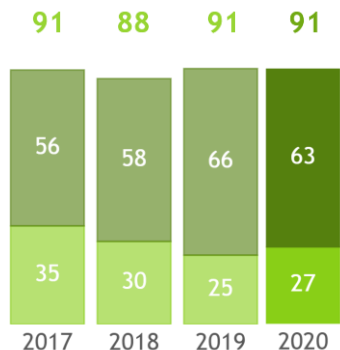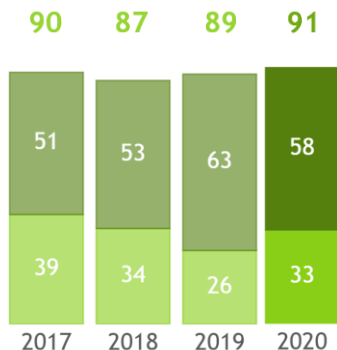
Seating availability
(% very or fairly good)

	2017	2018	2019	2020
Total	94	91	96	95
Very good	55	60	73	70
Fairly good	39	31	23	24

Table cleanliness
(% very or fairly good)

	2017	2018	2019	2020
Total	91	88	91	91
Very good	56	58	66	63
Fairly good	35	30	25	27

Pleasantness of area
(% very or fairly good)
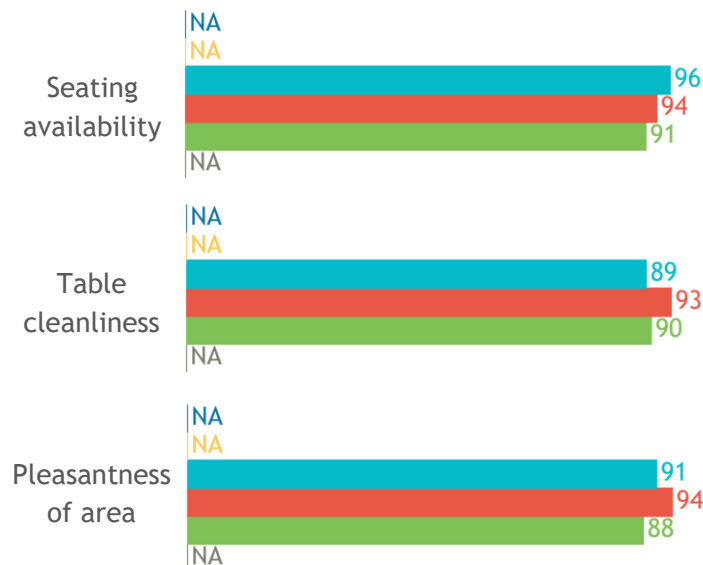
	2017	2018	2019	2020
Total	90	87	89	91
Very good	51	53	63	58
Fairly good	39	34	26	33

■ Very good   ■ Fairly good

2020 ratings by operator (% very or fairly good)

Seating availability
- Euro Garages: NA
- Extra: NA
- Moto: 96
- Roadchef: 94
- Welcome Break: 91
- Westmorland: NA

Table cleanliness
- Euro Garages: NA
- Extra: NA
- Moto: 89
- Roadchef: 93
- Welcome Break: 90
- Westmorland: NA

Pleasantness of area
- Euro Garages: NA
- Extra: NA
- Moto: 91
- Roadchef: 94
- Welcome Break: 88
- Westmorland: NA

NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
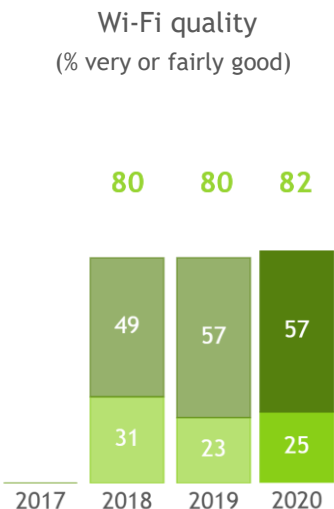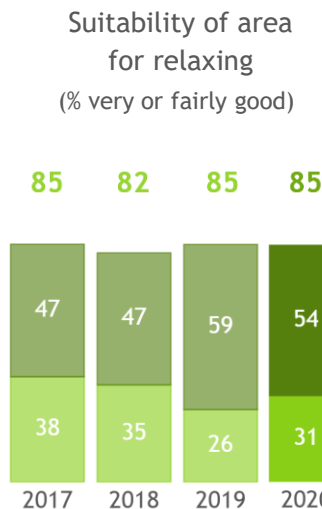■ Welcome Break   ■ Westmorland

NA - No available data as base is less than 30

Q16: You said that you rested/ate you own food, please rate .... using the scale below.
Bases in chart order: 2020: All MSA (478/475/479), Euro Garages (3/3/3), Extra (17/17/17), Moto (210/210/211), Roadchef (108/106/108), Welcome Break (116/115/116), Westmorland (16/16/16)
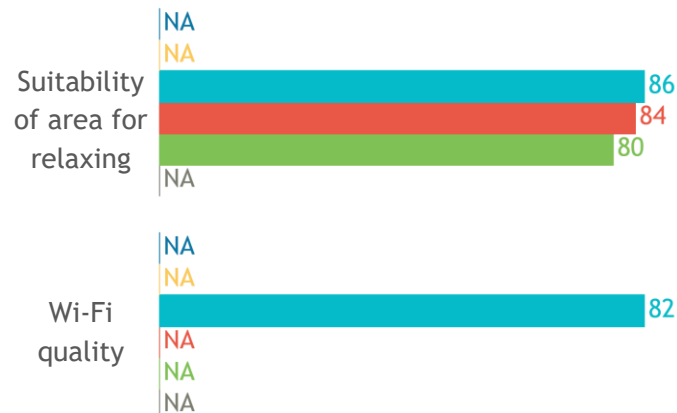
WATERMELON

Resting and eating own food (2)

All MSAs ratings

Suitability of area for relaxing
(% very or fairly good)

	2017	2018	2019	2020
	85	82	85	85
Very good	47	47	59	54
Fairly good	38	35	26	31

Wi-Fi quality
(% very or fairly good)

	2017	2018	2019	2020
		80	80	82
Very good		49	57	57
Fairly good		31	23	25

■ Very good   ■ Fairly good

2020 ratings by operator (% very or fairly good)

Suitability of area for relaxing
- Euro Garages: NA
- Extra: NA
- Moto: 86
- Roadchef: 84
- Welcome Break: 80
- Westmorland: NA

Wi-Fi quality
- Euro Garages: NA
- Extra: NA
- Moto: 82
- Roadchef: NA
- Welcome Break: NA
- Westmorland: NA

NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
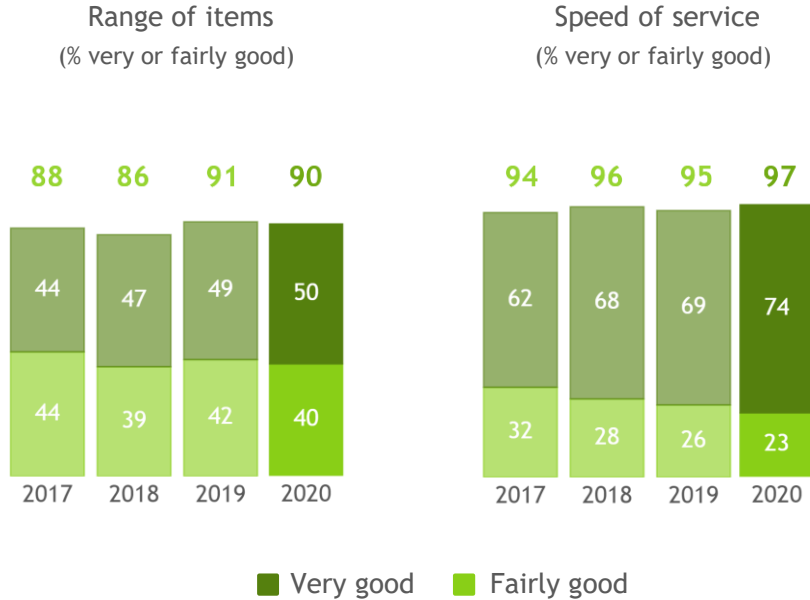■ Welcome Break   ■ Westmorland

NA - No available data as base is less than 30

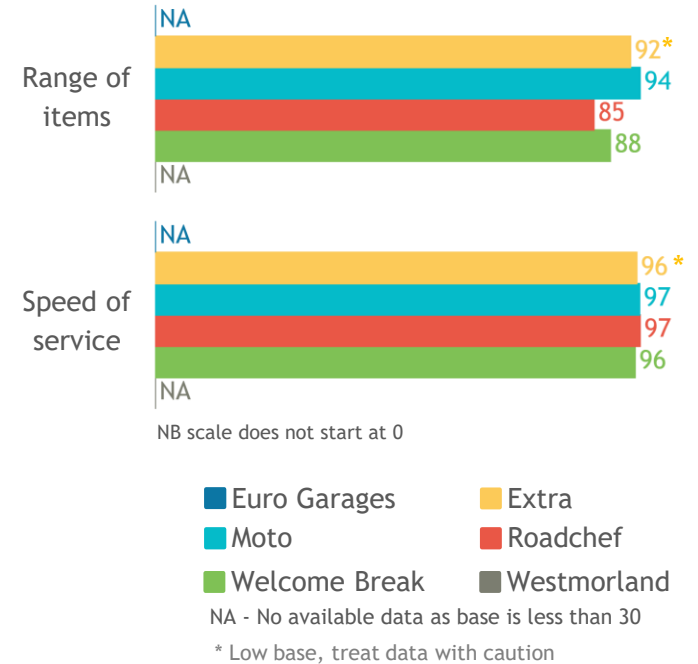Q16: You said that you rested/ate you own food, please rate …. using the scale below.
Bases in chart order: 2020: All MSA (481/119), Euro Garages (3/1), Extra (17/4), Moto (212/57), Roadchef (108/26), Welcome Break (117/26), Westmorland (16/4)

WATERMELON

Convenience items (1)

All MSAs ratings

Range of items
(% very or fairly good)

	2017	2018	2019	2020
Total	88	86	91	90
Very good (top)	44	47	49	50
Fairly good (bottom)	44	39	42	40

Speed of service
(% very or fairly good)

	2017	2018	2019	2020
Total	94	96	95	97
Very good (top)	62	68	69	74
Fairly good (bottom)	32	28	26	23

■ Very good   ■ Fairly good

2020 ratings by operator (% very or fairly good)

Range of items
- Euro Garages: NA
- Extra: 92 *
- Moto: 94
- Roadchef: 85
- Welcome Break: 88
- Westmorland: NA

Speed of service
- Euro Garages: NA
- Extra: 96 *
- Moto: 97
- Roadchef: 97
- Welcome Break: 96
- Westmorland: NA

NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
■ Welcome Break   ■ Westmorland

NA - No available data as base is less than 30
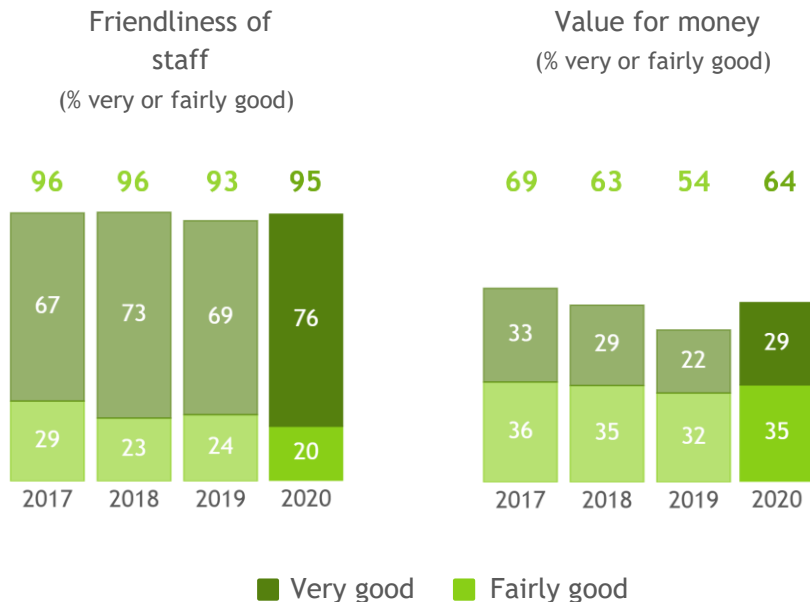
* Low base, treat data with caution

Q16: You said that you bought convenience items, please rate .... using the scale below.
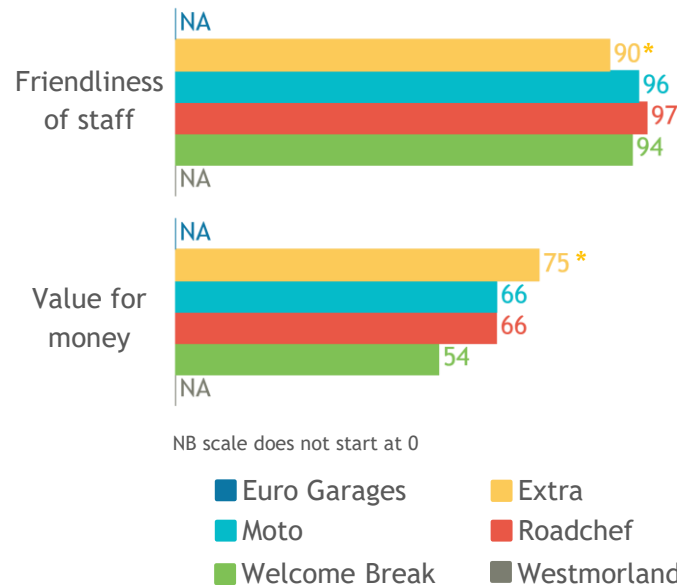Bases in chart order: 2020: All MSA (994/1002), Euro Garages (25/25), Extra (52/53), Moto (343/342), Roadchef (223/225), Welcome Break (310/316), Westmorland (28/28)

WATERMELON

Convenience items (2)

All MSAs ratings

Friendliness of staff
(% very or fairly good)

	2017	2018	2019	2020
Total	96	96	93	95
Very good	67	73	69	76
Fairly good	29	23	24	20

Value for money
(% very or fairly good)

	2017	2018	2019	2020
Total	69	63	54	64
Very good	33	29	22	29
Fairly good	36	35	32	35

■ Very good ■ Fairly good

2020 ratings by operator (% very or fairly good)

Friendliness of staff

Operator	Value
Euro Garages	NA
Extra	90*
Moto	96
Roadchef	97
Welcome Break	94
Westmorland	NA

Value for money

Operator	Value
Euro Garages	NA
Extra	75*
Moto	66
Roadchef	66
Welcome Break	54
Westmorland	NA

NB scale does not start at 0

■ Euro Garages ■ Extra
■ Moto ■ Roadchef
■ Welcome Break ■ Westmorland

* Low base, treat data with caution
NA - No available data as base is less than 30

Q16: You said that you bought convenience items, please rate .... using the scale below.
Bases in chart order: 2020: All MSA (981/994), Euro Garages (25/25), Extra (48/52), Moto (336/341), Roadchef (219/222), Welcome Break (312/313), Westmorland (28/28)
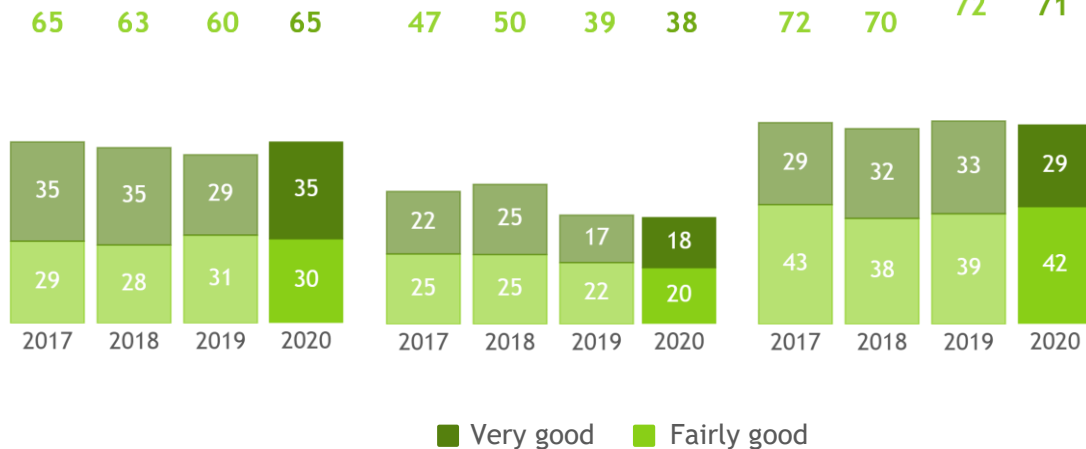
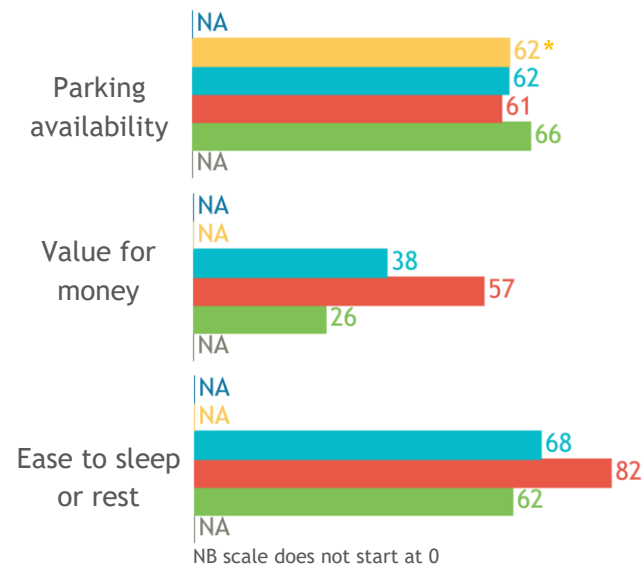WATERMELON

HGV facilities (1)

All MSAs ratings

Parking availability
(% very or fairly good)

2017	2018	2019	2020
65	63	60	65

Value for money
(% very or fairly good)

2017	2018	2019	2020
47	50	39	38

Ease to sleep or rest
(% very or fairly good)

2017	2018	2019	2020
72	70	72	71

■ Very good   ■ Fairly good

2020 ratings by operator (% very or fairly good)

Parking availability
- Euro Garages: NA
- Extra: 62 *
- Moto: 62
- Roadchef: 61
- Welcome Break: 66
- Westmorland: NA

Value for money
- Euro Garages: NA
- Extra: NA
- Moto: 38
- Roadchef: 57
- Welcome Break: 26
- Westmorland: NA

Ease to sleep or rest
- Euro Garages: NA
- Extra: NA
- Moto: 68
- Roadchef: 82
- Welcome Break: 62
- Westmorland: NA

NB scale does not start at 0

■ Euro Garages   ■ Extra
■ Moto   ■ Roadchef
■ Welcome Break   ■ Westmorland

Q16: You said that you used the HGV facilities, please rate ….. using the scale below.
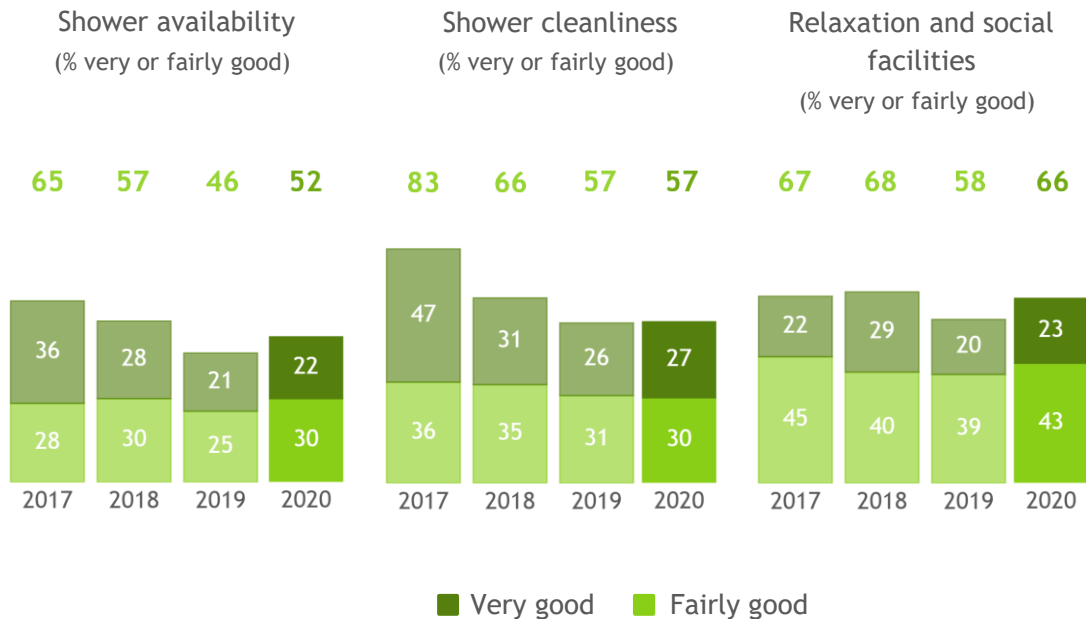
Bases in chart order: 2020: All MSA (713/390/405), Euro Garages (21/7/7), Extra (37/25/25), Moto (316/166/181), Roadchef (132/72/60), Welcome Break (172/100/109), Westmorland (21/9/13)

NA - No available data as base is less than 30
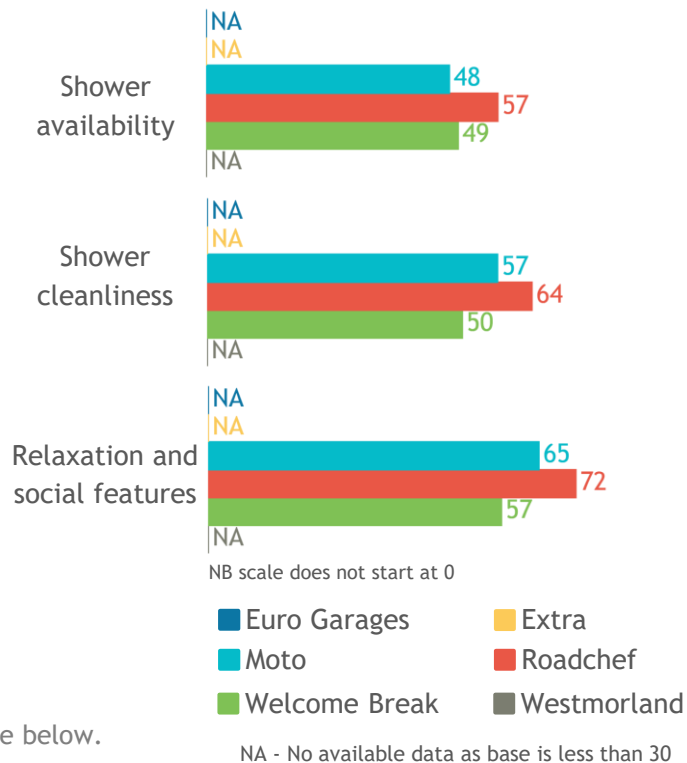* Low base, treat data with caution

WATERMELON

HGV facilities (2)

All MSAs ratings

Shower availability
(% very or fairly good)

2017	2018	2019	2020
65	**57**	**46**	**52**

Very good: 36 (2017), 28 (2018), 21 (2019), 22 (2020)
Fairly good: 28 (2017), 30 (2018), 25 (2019), 30 (2020)

Shower cleanliness
(% very or fairly good)

2017	2018	2019	2020
83	**66**	**57**	**57**

Very good: 47 (2017), 31 (2018), 26 (2019), 27 (2020)
Fairly good: 36 (2017), 35 (2018), 31 (2019), 30 (2020)

Relaxation and social facilities
(% very or fairly good)

2017	2018	2019	2020
67	**68**	**58**	**66**

Very good: 22 (2017), 29 (2018), 20 (2019), 23 (2020)
Fairly good: 45 (2017), 40 (2018), 39 (2019), 43 (2020)

Legend: ■ Very good ■ Fairly good

2020 ratings by operator (% very or fairly good)

Shower availability
- Euro Garages: NA
- Extra: NA
- Moto: 48
- Roadchef: 57
- Welcome Break: 49
- Westmorland: NA

Shower cleanliness
- Euro Garages: NA
- Extra: NA
- Moto: 57
- Roadchef: 64
- Welcome Break: 50
- Westmorland: NA

Relaxation and social features
- Euro Garages: NA
- Extra: NA
- Moto: 65
- Roadchef: 72
- Welcome Break: 57
- Westmorland: NA

NB scale does not start at 0

Legend:
■ Euro Garages ■ Extra
■ Moto ■ Roadchef
■ Welcome Break ■ Westmorland

NA - No available data as base is less than 30

Q16: You said that you used the HGV facilities, please rate ..... using the scale below.

Bases in chart order: 2020: All MSA (295/271/531), Euro Garages (3/2/17), Extra (17/16/24), Moto (128/116/233), Roadchef (49/44/93), Welcome Break (81/76/134), Westmorland (9/9/17)

WATERMELON

Key drivers of overall satisfaction

Those using only the toilets

Key driver
Cleanliness
of toilet
38%

- 38%
- 32%
- 13%
- 6%
- 4%
- 4%
- 3%
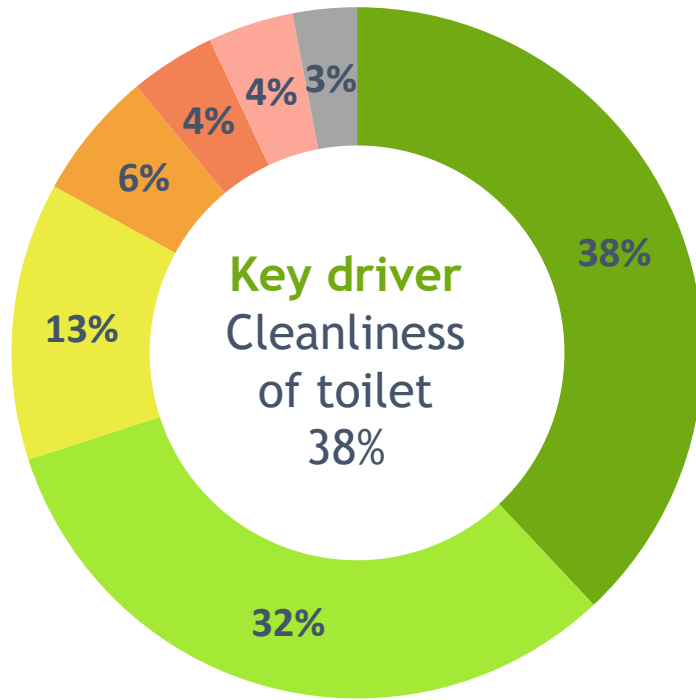
■ Cleanliness of toilet

■ Impression of building interior

■ Number of toilets available

■ Quality of fixtures/fittings/decor

■ Quality of road surfaces

■ Impression of building exterior

■ Getting from slip road to where you parked

R SQUARE: 31%. Method used is stepwise regression which identifies the factors that correlate most highly with overall satisfaction. Where factors are intercorrelated the one most influential on overall satisfaction accounts for them
Base: All Non-HGV, nor with a tour/coach group (2854)

WATERMELON

Those who bought food/drink to have in MSA but did not use the toilets

Key driver
The quality of food and drinks
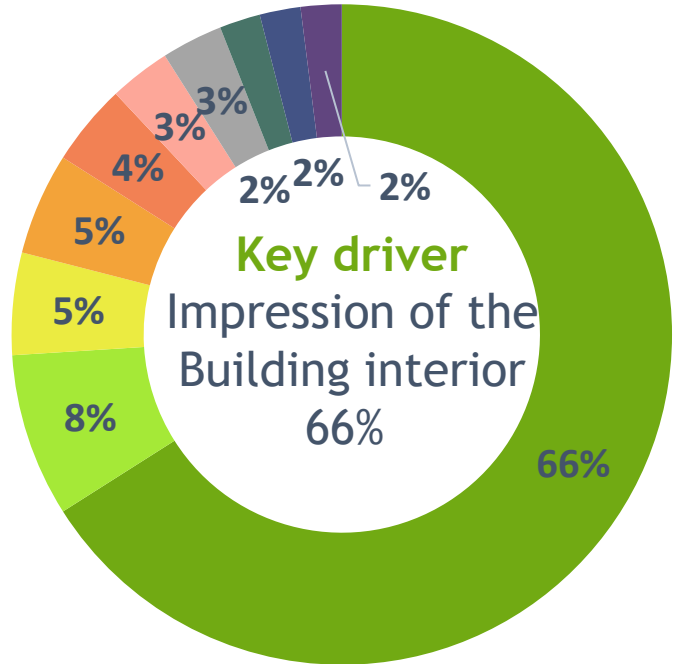33%

33%

24%

21%

9%

8%

5%
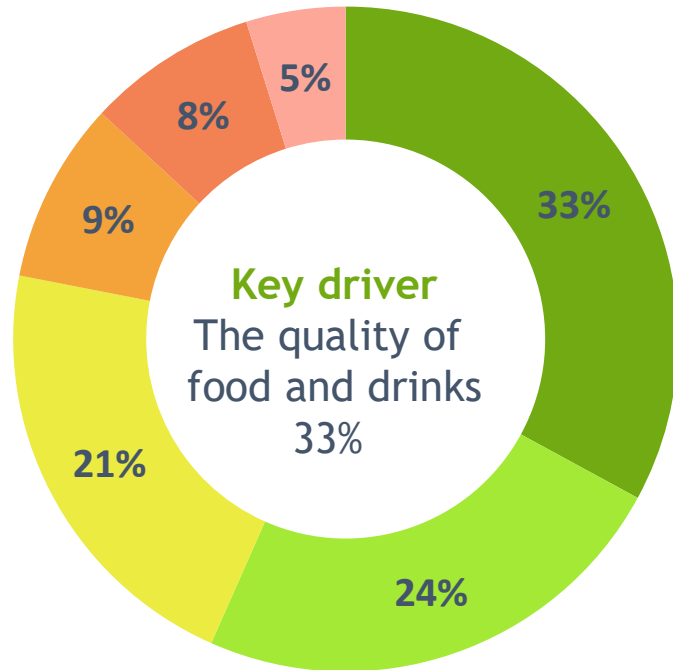
- The quality of the food/drinks you had
- Enough space/seating being available
- The range of food/drinks available
- Impression of building interior
- The speed of service
- Impression of building exterior

*

R SQUARE : 25%. Method used is stepwise regression which identifies the factors that correlate most highly with overall satisfaction. Where factors are intercorrelated the one most influential on overall satisfaction accounts for them
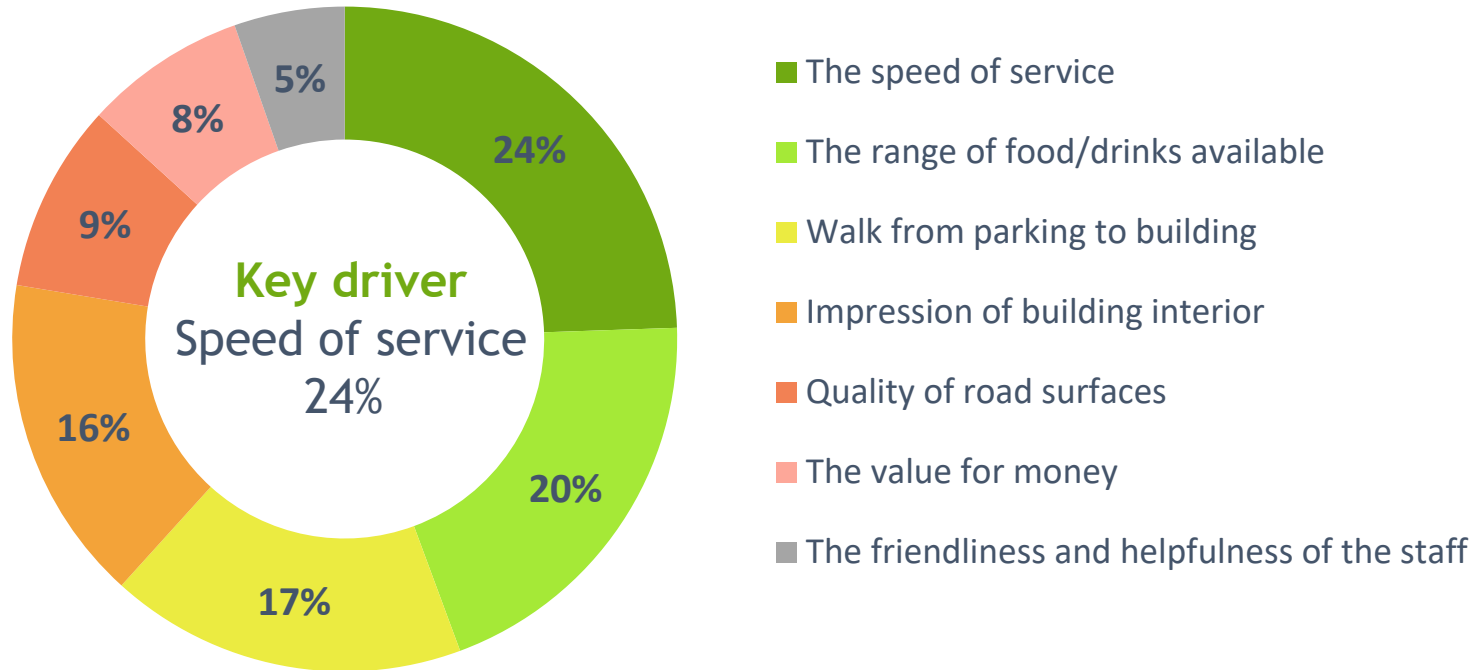Base: All Non-HGV, not with a tour/coach group (1030)

WATERMELON

Those who bought food/drink to have in MSA and used the toilets

Key driver
Impression of the Building interior
66%

- Impression of building interior
- The range of food/drinks available
- The quality of the food/drinks you had
- The friendliness and helpfulness of the staff
- The speed of service
- Enough space/seating being available
- Quality of toilet fixtures/fittings/decor
- Walk from parking to building
- How clean the tables/eating area was kept
- Cleanliness of the toilets

R SQUARE : 36%. Method used is stepwise regression which identifies the factors that correlate most highly with overall satisfaction. Where factors are intercorrelated the one most influential on overall satisfaction accounts for them.
Base: All Non-HGV, nor with a tour/coach group (1976)

WATERMELON

Those who bought food/drink to have in their vehicle but did not use the toilets

Key driver
Speed of service
24%

24%

20%

17%

16%

9%

8%

5%

- The speed of service
- The range of food/drinks available
- Walk from parking to building
- Impression of building interior
- Quality of road surfaces
- The value for money
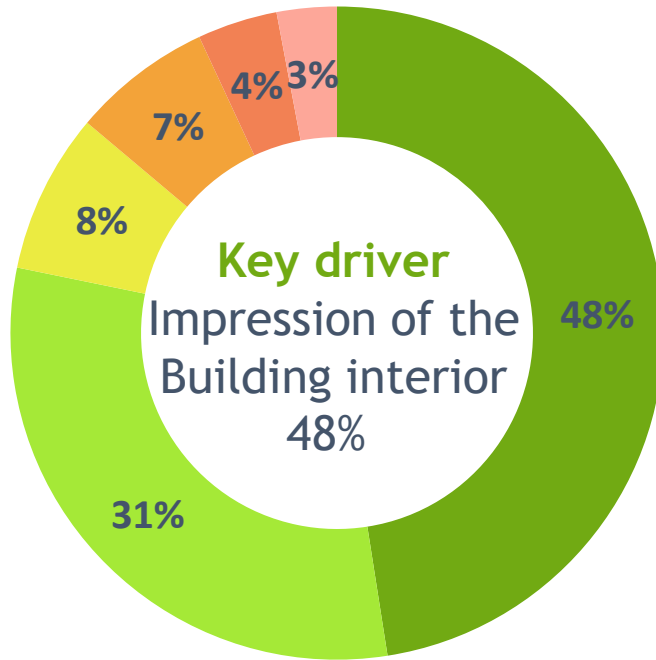- The friendliness and helpfulness of the staff

R SQUARE: 29%. Method used is stepwise regression which identifies the factors that correlate most highly with overall satisfaction. Where factors are intercorrelated the one most influential on overall satisfaction accounts for them.
Base: All Non-HGV, nor with a tour group (887)

WATERMELON

Those who bought food/drink to have in their vehicle and used the toilets

Key driver
Impression of the
Building interior
48%

48%

31%

8%

7%

4% 3%

- Impression of building interior
- Cleanliness
- The range of food/drinks available
- The value for money
- The friendliness and helpfulness of the staff
- Clarity of approach signs

R SQUARE: 29%. Method used is stepwise regression which identifies the factors that correlate most highly with overall satisfaction. Where factors are intercorrelated the one most influential on overall satisfaction accounts for them.
Base: All Non-HGV, nor with a tour/coach group (1458)

WATERMELON