

# Motorway Services User Survey 2022

October 2022





# Summary

**“Are we there yet?” The kids are screaming in the back, you’ve been driving for hours and your partner needs the toilet. What a relief to see the sign: Services 1m. Gratefully, you take the slip road. But what awaits you at the motorway service area (MSA)?**

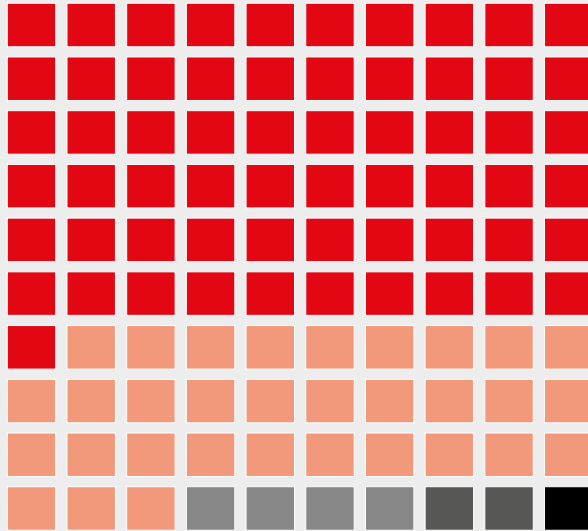
If you’ve stopped at an MSA recently, whether you are travelling for work or leisure, our research shows that you were probably pretty satisfied with your visit. But what are the best and worst bits of visiting an MSA? Which operators – and individual sites – are ranked highest and lowest? Which users are most and least satisfied? And, crucially, what can operators do to improve the experience? Our research answers all these questions and more.

# MSAs do a great job

The good news is that most MSAs are doing a great job. Our research shows that overall satisfaction and likelihood to recommend ('net promoter score' or NPS) scores are high across the board.

# Overall satisfaction

## Overall satisfaction (%)



- 61% Very satisfied
- 32% Fairly satisfied
- 4% Neither
- 2% Fairly dissatisfied
- 1% Very dissatisfied

Base: All MSA visitors (31,204)

Overall, 93 per cent of visitors are satisfied, including 61 per cent who say they are very satisfied. Overall satisfaction for individual MSAs ranges from 100 per cent (Rugby, Moto) down to 80 per cent (Hartshead Moor East, Welcome Break). So, even at the lower end, 80 per cent or more users are satisfied.

*"The staff were very friendly and made me feel welcome. Felt like I could stay as long as needed with no rush."*

*"Plenty of space to sit down. Good variety of shopping outlets."*







## Overall satisfaction - highest rated MSAs (%)

Moto	Rugby	100
Moto	Donington Park	99
Extra	Blackburn with Darwen	99
Roadchef	Strensham North	99
Moto	Medway East	99

## Overall satisfaction - lowest rated MSAs (%)

Welcome Break	Warwick South	84
Welcome Break	Birchanger Green	83
Welcome Break	Charnock Richard South	83
Moto	Lancaster South	83
Welcome Break	Hartshead Moor East	80



## Overall satisfaction by MSA (%)

■ Moto

■ Extra

■ Roadchef

■ Euro Garages

■ Welcome Break

■ Stop24

Rank	MSA	T2B	Operator
1	Rugby	100	Moto
2	Donington Park	99	Moto
3	Blackburn with Darwen	99	Extra
4	Strensham North	99	Roadchef
5	Medway East	99	Moto
6	Stafford South	98	Roadchef
7	Wetherby	98	Moto
8	Peterborough	98	Extra
9	Washington South	98	Moto
10	Rivington North	98	Euro Garages
11	Burton-in-Kendal	98	Moto
12	Knutsford North	98	Moto
13	Stafford North	97	Moto
14	Northampton South	97	Roadchef
15	Tibshelf South	97	Roadchef
16	Birch West	97	Moto
17	Corley North	97	Welcome Break
18	Keele North	97	Welcome Break
19	Sarn Park	97	Welcome Break
20	Killington Lake	97	Roadchef
21	Northampton North	97	Roadchef
22	Corley South	97	Welcome Break
23	Oxford	97	Welcome Break
24	Fleet North	97	Welcome Break
25	Medway West	97	Moto
26	Chieveley	97	Moto
27	Reading West	97	Moto
28	Maidstone	97	Roadchef
29	Leeds Skelton Lake	96	Extra
30	Tibshelf North	96	Roadchef

Rank	MSA	T2B	Operator
31	Exeter	96	Moto
32	Baldock	96	Extra
33	Chester	96	Roadchef
34	Rivington South	96	Euro Garages
35	Cherwell Valley	96	Moto
36	Winchester South	96	Moto
37	Heston East	96	Moto
38	Keele South	95	Welcome Break
39	Cullompton	95	Extra
40	Strensham South	95	Roadchef
41	Doncaster North	95	Moto
42	Watford Gap South	95	Roadchef
43	Trowell South	95	Moto
44	Durham	95	Roadchef
45	Trowell North	95	Moto
46	South Mimms	95	Welcome Break
47	Clacket Lane East	95	Roadchef
48	Woolley Edge South	95	Moto
49	Clacket Lane West	95	Roadchef
50	Fleet South	95	Welcome Break
51	Hopwood Park	95	Welcome Break
52	Leicester Forest East North	95	Welcome Break
53	Michaelwood South	95	Welcome Break
54	Hamilton	94	Roadchef
55	Burtonwood	94	Welcome Break
56	Taunton Deane North	94	Roadchef
57	Leicester Forest East South	94	Welcome Break
58	Beaconsfield	94	Extra
59	Pease Pottage	94	Moto
60	Birch East	94	Moto

Moto
  Extra
  Roadchef
  Euro Garages
  Welcome Break
  Stop24

**Rank MSA T2B Operator**

61	Sandbach North	94	Roadchef
62	Heston West	94	Moto
63	Magor	94	Roadchef
64	Rownhams West	94	Roadchef
65	Leigh Delamere East	94	Moto
66	Annandale Water	93	Roadchef
67	Norton Canes	93	Roadchef
68	Cobham	93	Extra
69	Blyth	93	Moto
70	Leigh Delamere West	93	Moto
71	Charnock Richard North	93	Welcome Break
72	Thurrock	93	Moto
73	London Gateway	93	Welcome Break
74	Pont Abraham	93	Roadchef
75	Reading East	93	Moto
76	Taunton Deane South	92	Roadchef
77	Hilton Park South	92	Moto
78	Washington North	92	Moto
79	Rownhams East	92	Roadchef
80	Lancaster North	92	Moto
81	Watford Gap North	92	Roadchef
82	Frankley North	92	Moto
83	Cardiff Gate	92	Welcome Break
84	Hilton Park North	92	Moto
85	Michaelwood North	91	Welcome Break
86	Sedgemoor South	91	Roadchef
87	Southwaite South	91	Moto
88	Abington	91	Welcome Break
89	Telford	90	Welcome Break
90	Newport Pagnell North	90	Welcome Break

**Rank MSA T2B Operator**

91	Sedgemoor North	90	Welcome Break
92	Winchester North	90	Moto
93	Southwaite North	90	Moto
94	Sandbach South	89	Roadchef
95	Severn View	89	Moto
96	Membury East	89	Welcome Break
97	Newport Pagnell South	89	Welcome Break
98	Toddington North	89	Moto
99	Knutsford South	89	Moto
100	Gretna Green	88	Welcome Break
101	Ferrybridge	88	Moto
102	Tamworth	88	Moto
103	Membury West	88	Welcome Break
104	Toddington South	88	Moto
105	Hartshead Moor West	87	Welcome Break
106	Bothwell	87	Roadchef
107	Woodall North	87	Welcome Break
108	Warwick North	87	Welcome Break
109	Gordano	86	Welcome Break
110	Bridgwater	86	Moto
111	Woodall South	85	Welcome Break
112	Frankley South	85	Moto
113	Woolley Edge North	84	Moto
114	Folkestone	84	Stop24
115	Warwick South	84	Welcome Break
116	Birchanger Green	83	Welcome Break
117	Charnock Richard South	83	Welcome Break
118	Lancaster South	83	Moto
119	Hartshead Moor East	80	Welcome Break

Base: All MSA visitors (31,204)

# Net Promoter Score

**We introduced the NPS in this year's survey to get a more granular view of how MSAs are performing. Whereas the difference between the top and bottom scores for satisfaction is 20 percentage points, the range of NPS - which is derived from likelihood to recommend the site - is wider, enabling us to get more insight into the performance of individual sites.**

Rugby is the top performer for both metrics with an NPS of 90, which is outstanding. NPS is widely used across many industry sectors and, although industries vary, an NPS of around 50 is considered excellent, and scores above 70 are rare. The MSA sector is clearly doing something right as the 30 top performing have scores of 50 and above. The bottom of the range is Frankley South (Moto), with a score of -16.

In general, MSAs with high satisfaction scores also have a high NPS, but sometimes this isn't the case. It is possible for users to be satisfied with their visit but unlikely to recommend the MSA, or vice versa. This may be because users have had an atypical experience, either good or bad.

For example, it could be that although the MSA needs to improve in a number of areas, users will still be likely to recommend it because of features such as reliable electric vehicle (EV) charging, a children's play area, a good space for dog walking or a scenic eating area. Or because it is the only one available on a particular stretch of road. Alternatively, users may have had an exceptionally good experience with a particular member of staff, leading to high satisfaction, but find the overall site lacking and so say they will not recommend it.

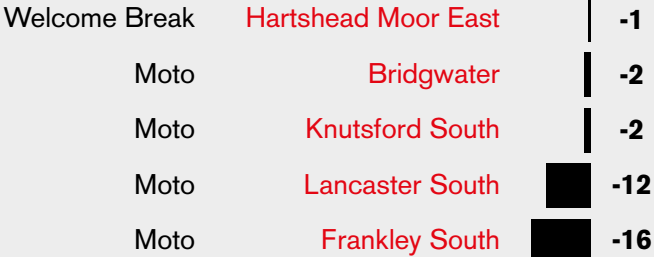
*"Nice environment, great walk around lake to exercise dog."*

*"We have a toddler and they had a little play area with really nice seating around."*

### Net Promoter Score - highest rated MSAs



### Net Promoter Score - lowest rated MSAs







# Happiness and relaxation

**Further evidence that MSAs are doing a great job is that people are happier and more relaxed when they leave than when they arrive. Among all MSA visitors, nearly a third (31 per cent) arrive either tired, stressed or frustrated.**

By the time they leave, this has fallen to seven per cent. People who spend between 30 minutes and an hour at the MSA have the greatest increase in happiness. These are likely to be the people who take time to have some food or drink on site, which 59 per cent of visitors do, and walk around the site or visit the shops and other facilities.

## All MSAs

↑ 30%

Increase in happy/relaxed upon leaving MSA

↓ 25%

Decrease in tired/stressed/frustrated upon leaving MSA

*"As a long distance driver we have to stop and take a rest as required by law. Most of the service stations have got all the things we need to make it more comfortable."*

*"Cheerful friendly staff and service was quick. Was able to enjoy my coffee and rest from driving."*

# But not all MSAs are equal

**The highest performing operators are Euro Garages, which has two MSAs in the survey, Extra (seven MSAs) and Roadchef (28 MSAs). Of the operators with multiple sites, Welcome Break is at the bottom for both satisfaction and NPS. Stop24 is a single site MSA in Folkestone which performs poorly across all key metrics, ranked 114 out of 119 for satisfaction, 79 for NPS and 103 for satisfaction with toilets.**

There is also considerable variability between sites within the multiple operators. For example, Moto has the two highest-rated sites by satisfaction, Rugby and Donington Park, but also the second lowest, Lancaster South.

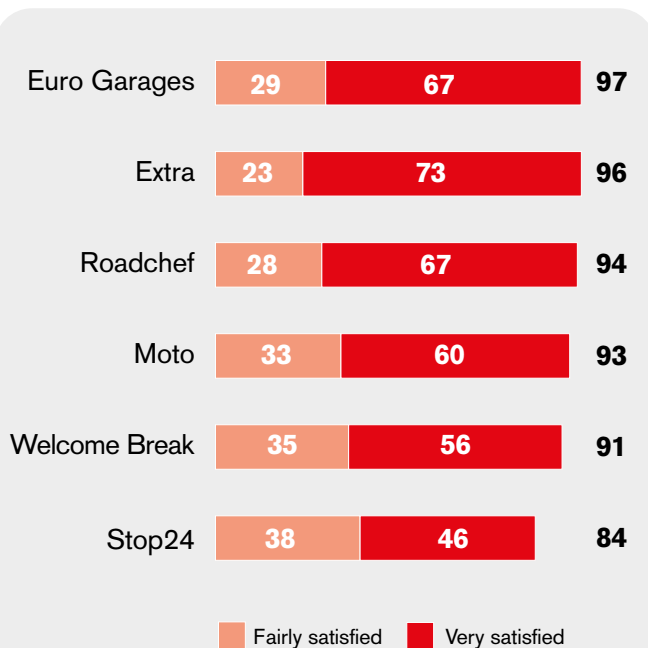
To some extent, variability in scores is to be expected as it reflects the wide variety of MSAs that exist. Some are brand new; some are decades old. Some are

large while others have limited space. However, older, smaller sites are not always necessarily the lowest rated, and there is a lot that can be done to satisfy users, regardless of the infrastructure of the MSA.

*"The experience wasn't welcoming and the buildings were very run down."*

*"This place is totally soulless!"*

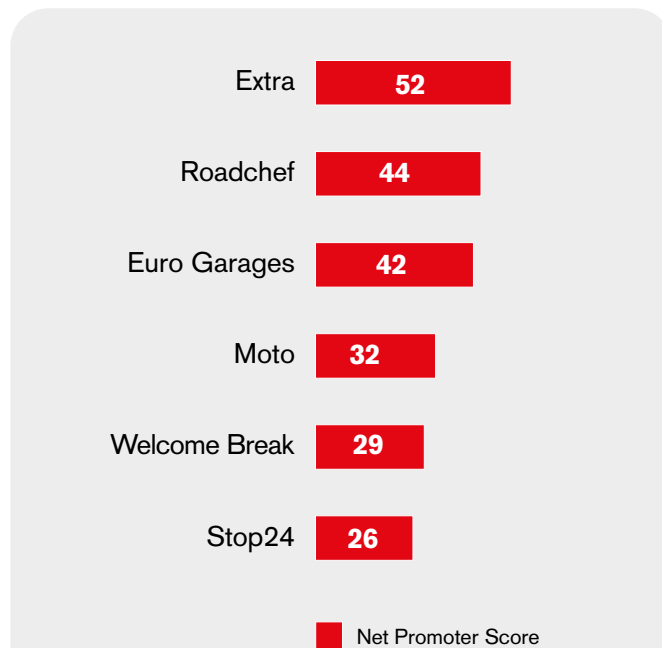
## Overall satisfaction by MSA operator (%)



Base: All MSA visitors (31,204), Moto (11,862), Euro Garages (447), Extra (1891) Roadchef (7588), Welcome Break (9177), Stop24 (239)

Due to rounding total satisfied may not be equal to numbers in chart.

## Net Promoter Score by MSA operator



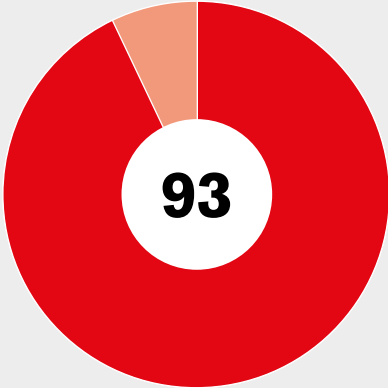
Base: All MSA visitors (31,252), Moto (11,874), Euro Garages (448), Extra (1893) Roadchef (7596), Welcome Break (9202), Stop24 (239)

# And not all visitors are equally satisfied

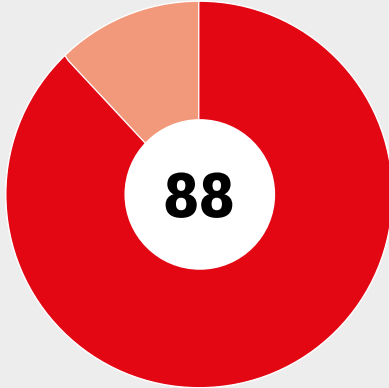


**There are differences in satisfaction between types of users. Commuters are the most satisfied and professional drivers - in particular HGV drivers - the least satisfied.**

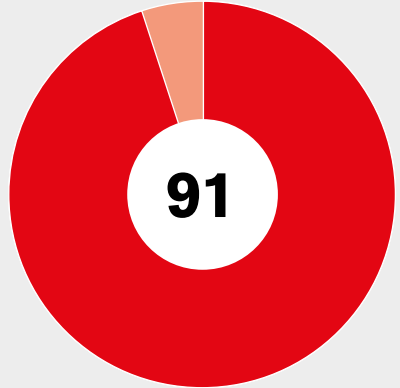
**Total very and fairly satisfied by visitor type (%)**



**All users**



**HGV drivers**



**Disabled users**



# Disabled users

**Disabled users are slightly less satisfied than average. In addition to this, 38 per cent of disabled visitors said that MSAs did not cater well for their impairment. Disabled visitors were the least satisfied of any user type with the number of toilets available, how clean the toilet facilities were and the quality of the fixtures and fittings in the toilet area.**

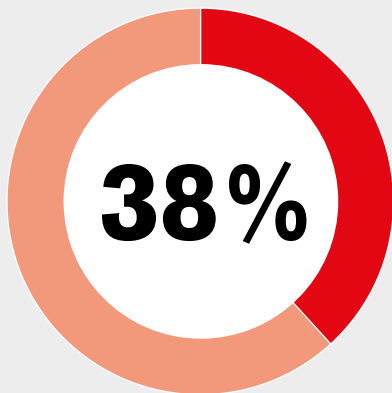
Disabled users' comments about their experiences show the areas that typically make them satisfied or less satisfied. These include the accessibility of the MSA and its facilities such as toilets, seating areas and parking. But also the cleanliness, information and signage, and thoughtfulness and kindness of staff.

See our report, *A more accessible road network?* for more insight into the experiences of disabled road users.

*"Plenty of disabled parking spaces and good access."*

*"Chaotic and over stimulating, not good for old / neuro-diverse."*

*"Staff spoke to me directly rather than to my husband and treated me with respect."*



38% don't feel MSAs cater well for their impairment.

*"I have a hearing impairment so things are well sign posted as I often rely on the visual."*

*"Toilet is locked. I need a key but desperately needed a wee so had to struggle on to normal toilets."*

*"I felt absolutely bad. A lady with a baby waited a long time for baby changing... I had to push in. I felt selfish but had no choice. They should be separate."*

# HGV drivers

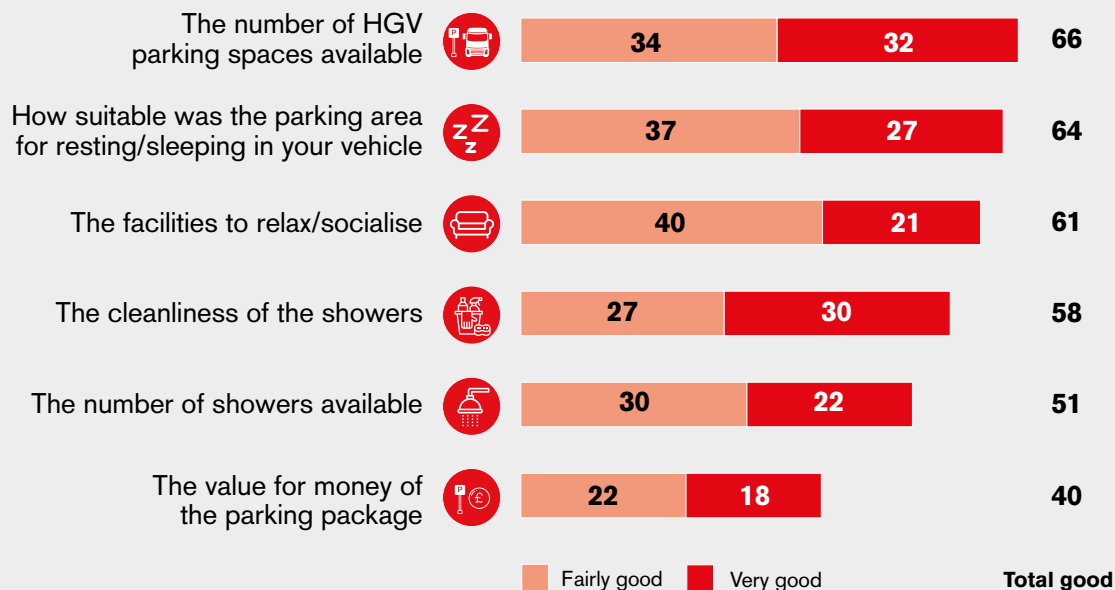
**HGV drivers have different needs from commuters or leisure travellers (see our report, *Lorry drivers' and roadside facilities: the user experience*, for more information). This research shows that ratings are lower for the HGV facilities than for other elements and the lowest ratings are for number of showers and value for money.**

HGV drivers are also less happy than other user types with the quality of the road surfaces in the MSA, the layout of the parking area and the safety and security of vehicle while left in the car park.

*"Facilities for HGV drivers are very substandard. It is expensive to park overnight and you have a very good chance of waking up the next morning to either diesel theft or load theft."*

*"HGV parking constantly taken up by caravans/motorhomes when we need the space as we are under driving hours laws."*

## How good are the HGV facilities (%)



Base: All MSA visitors using HGV facilities (between 380-702)

Due to rounding total good may not be equal to numbers in chart.





# MSAs provide an essential service

**Why do we conduct this research and ask so many users about their experiences? And why should MSA operators work to improve their sites and the experience of visiting? After all, even the lowest performing are satisfying four out of every five users. And most users stop spontaneously, rather than plan to go there, so it could be hard to make the case for improvements – users will stop there anyway.**

However, this research shows that a bad experience can put people off and a good experience can make people choose to stop at a specific MSA on their journey.

And we don't need this research to tell us how important MSAs are to road users and the benefits of taking a break when driving, especially when tired. Although the sector is doing well as a whole, improving the lower performers will impact on the whole sector and reassure users that they can expect a consistent quality of service wherever they stop. The more welcoming and pleasant the site can be, the more likely users are to spend time and money there, and leave feeling happier and relaxed – so the greater the benefit to both user and MSA operator.

*"We had used it before and found it to be the best services."*

*"On our Northbound journey we had had a bad experience at another service station. We needed services and saw this one would be available."*

# **Key features of the MSAs**



**How are MSAs doing on these key features and where can they improve?**

# Approach to MSA

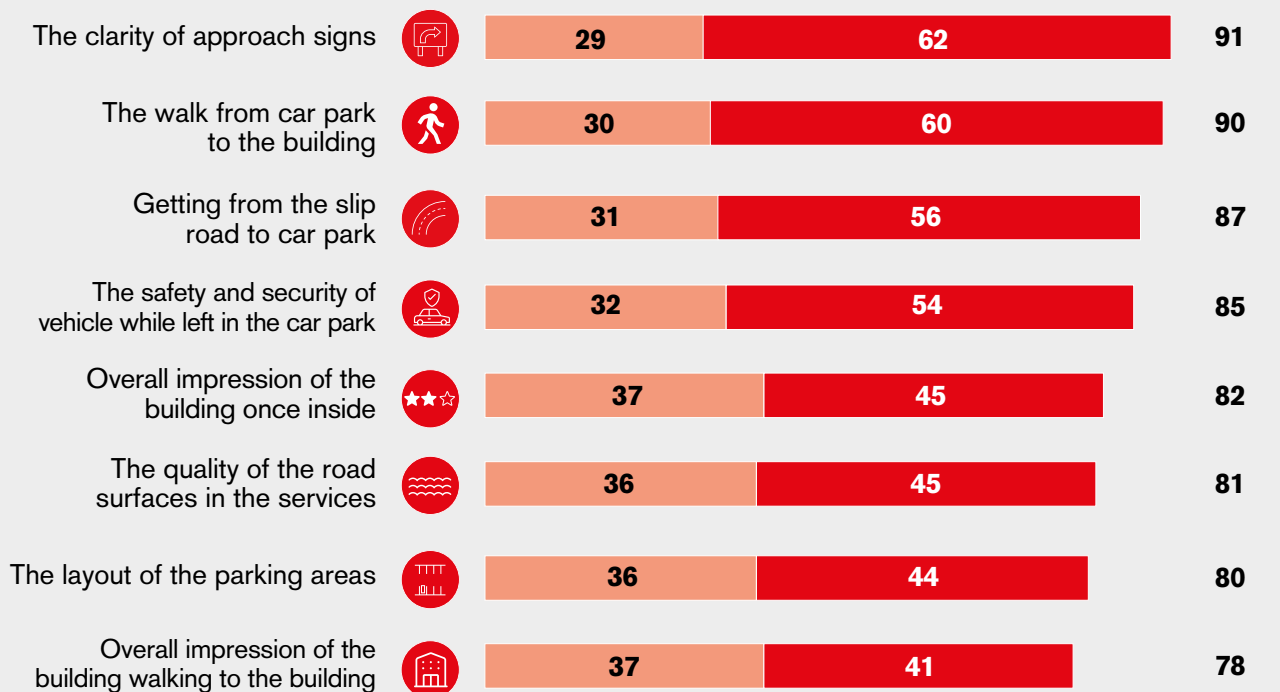
**When a user decides to leave the motorway and visit an MSA, the information they see and the layout and quality of the approach are all important in helping them navigate safely, park in an appropriate place and enter the MSA building with ease.**

Overall, MSAs are performing well on all of these factors but there is most room for improvement in the quality of road surfaces, layout of the parking area and overall impression of the building. The overall impression of the building is important because it sets the tone for the whole visit. Again, older sites may not be as visually appealing as newer ones, but attention to road surfaces, signage, cleanliness and pedestrian walkways can go a long way to creating a good first impression.

*"Its a well presented services... outside space is wonderful."*

*"Road surface poor, unclear how to access parent and child parking."*

## How good is the approach to the MSA (%)



Base: All MSA visitors (between 5391-5547)

Fairly good

Very good

**Total good**

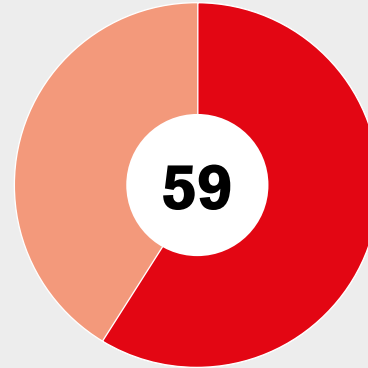
Due to rounding total good may not be equal to numbers in chart.

# Food and drink

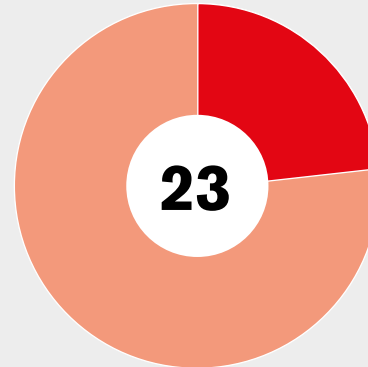
Users rated having somewhere to sit if you are eating in, and friendly helpful staff, as the best parts of having food and drink at an MSA. This is regardless of where they bought their food – and only three per cent of users are motivated to stop by the presence of a specific food and drink brand. Users are less happy with the quality of the Wi-Fi available, and the value for money.

*"They took time to understand what I can eat even when busy, as I have an allergy."*

*"The service at the food outlets was exceptional. Really fast service, friendly staff."*



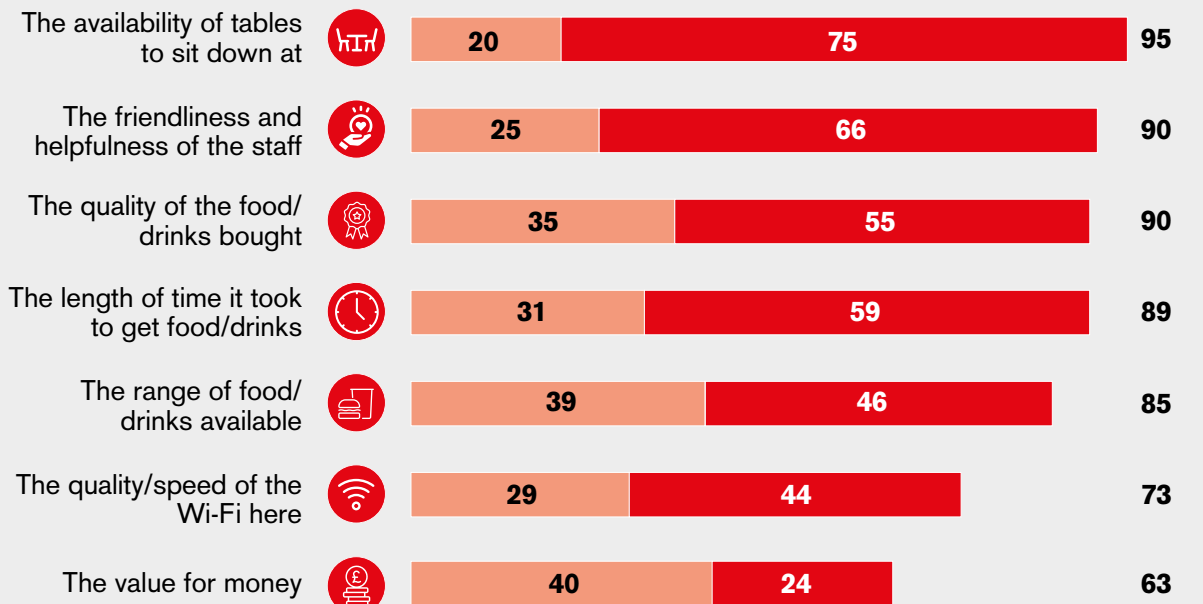
**59% of visitors  
bought food  
to eat at the  
services**



**23% of visitors  
bought food  
to eat in the  
vehicle**



## How good is the food and drink (%)



Base: All MSA visitors buying food and drink to eat in the MSA (between 893-3239)

Fairly good

Very good

**Total good**

Due to rounding total good may not be equal to numbers in chart.

# Toilets

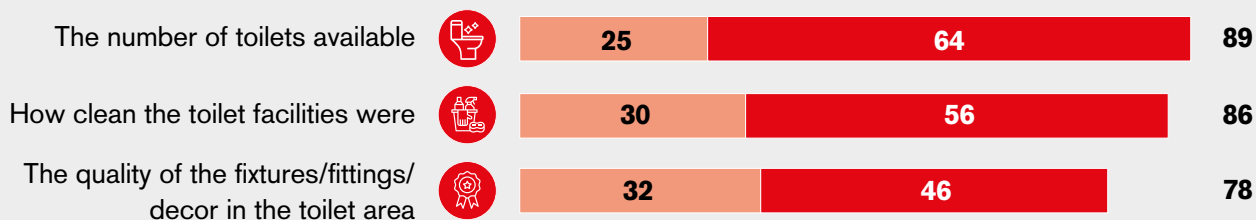
**One of the most important elements of the MSA, satisfaction with toilets is high across the board – 88 per cent overall. This is important because 82 per cent of people use the toilets when they visit an MSA, despite only 38 per cent saying they stop specifically to do so.**

Users were least happy with the quality of fixtures and fittings in the toilet area, and most happy with the number of toilets available – although this falls from 89 per cent to 82 per cent for disabled visitors and 83 per cent for HGV drivers.

*“The toilets have got to be the best in any services I’ve been to ... That little extra touch with the hand cream and deodorant even sanitary products... Fab.”*

*“The toilets were dated, some were out of order, some were dirty.”*

## How good are the toilets (%)



Base: All MSA visitors using toilets (between 4321-4335)

Fairly good

Very good

Total good



# Sustainability

**There are a number of ways that an MSA can show efforts to reduce environmental impact. The one that users are most likely to notice is the provision of charging for electric vehicles (EVs). Only four per cent use the charging facilities at present, but this will only grow. Currently, users of EV facilities are most happy with the payment options available and ease of use and least happy with the information available and value for money.**

As well as EV facilities, some MSAs are making an effort to offer other services that contribute to sustainability, such as recycling facilities. Users who notice efforts to reduce environmental impact -16 per cent overall – give higher satisfaction scores than those who don't.

For more information, see our report, *Electric vehicle charging: the user experience*.

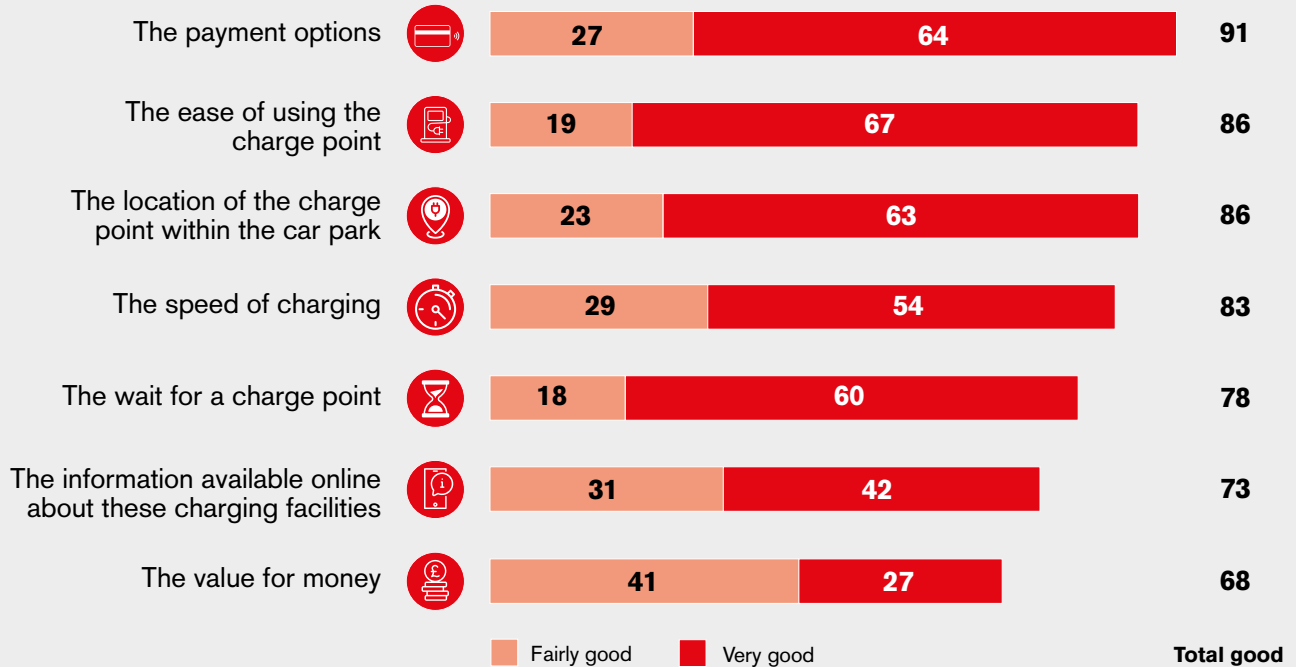
*"Noticed solar panels on the roof."*

*"Surrounded by numerous trees. Plenty of rubbish bins. Outside tables cleaned."*

*"Good number of EV charging points."*



## How good are the EV charging facilities (%)



Base: All MSA visitors using EV chargers (between 197-236)







# What can operators do to improve?

**What can MSA operators take from this research? Of course, investment and improvements are noticed and welcomed by visitors. But it may not be realistic or cost-effective to improve every single area where an individual MSA falls short.**

Inevitably older sites will require more maintenance and may look less up-to-date than others. However, some improvements are easier to implement than others and there are numerous improvements that don't require any capital investment but have a big impact on satisfaction.

## **1. Share – and seek out – best practice**

What are your best performing MSAs doing that you could easily transfer to your poorest performers? What are your competitors doing that you can emulate? And what is best practice in other related industries – such as retail, hospitality, transport – that you can transfer to your sites?

## **2. Value your staff**

Users rate staff highly across the board and when users reported having a particularly positive experience, it was often down to the staff. A friendly welcome and a staff member taking time to treat someone as an individual can turn around a bad experience and make a good experience memorable. And it is widely recognised that staff who feel valued are more able to give good customer service.

## **3. Invest in maintenance and upkeep**

The good news is that you don't have to have the newest MSA with the most up-to-date facilities as long as what you do have is well maintained and scrupulously clean. Older sites can achieve satisfaction as high as newer ones without capital investment. It may not be realistic to fully

refurbish a toilet area but keeping it clean and with the toilet paper and soap always topped up can make all the difference.

## **4. Consider parking layout**

There may be little an MSA can do about the space available for parking, but changing the layout can be a low-cost way of meeting users' needs more effectively. At least, MSAs could conduct a review of whether there is enough space for disabled people and for HGV drivers and whether these spaces are appropriately located.

## **5. Focus on the HGV experience**

In particular, HGV drivers need safe parking spaces where they can rest or sleep and access to toilets and showers. HGV drivers are vital to the economy, something the Government recognised when it made significant funding available in April this year to improve roadside HGV facilities.

## **6. Think about accessibility and information more widely**

For example, ensure that the disabled toilet is always in

working order and that, if it is locked, it is obvious how to get the key quickly. Putting baby changing facilities into an accessible toilet may not be the best solution if there is only the one available. Additionally, signage is important and not just for disabled people – the right information can help all users to have a better experience. For example, MSA operators may not be able to immediately improve the quality of the Wi-Fi at a site but they can provide information to help people log on, which may improve the experience.

## **7. Promote sustainability**

The demand for EV charging is likely to grow and MSAs need to meet that demand for recharging on longer journeys. Although there may not be much MSA operators can do in the short term about costs or speed of charging, they can ensure that there is information available to help people use the EV points. They can also take steps to ensure that each site is welcoming and appealing and that EV users enjoy their visit while they wait for their vehicle to charge.

Overall, the MSA sector is performing well, but the sites at the bottom of the ranking can do a lot to improve without necessarily requiring much capital investment – staff training, maintenance and upkeep, cleanliness, signage, and so on. By making each site the best it can be, operators are ensuring that MSAs continue to play a critical role in enabling road users – families on day trips, people travelling to and from work, HGV drivers carrying goods to stock our supermarkets – to make their journeys in comfort and safety.

## **What's next?**

We are planning to repeat this survey next year to see what has changed. Sites that are currently undergoing or have planned refurbishments or other improvements will be able to see the impact.

This research is possible only with the support and cooperation of MSA operators, staff and users so we would like to thank everyone who has been involved in this important study.

# What we did

# A fresh approach

**Unlike previous years, MSUS 2022 was split into two elements, one conducted face to face at the MSA (key metrics) and the other done either online at a later stage or on site with the interviewer (detailed experience).**

This approach provides robust scores on the key metrics by maximising the number of respondents intercepted on site, as well as detailed insight into a range of other measures.

The survey covered 119 MSAs across England (110), Scotland (five) and Wales (four) and fieldwork ran from 25 May to 17 July 2022.<sup>1</sup>

Individual MSAs are weighted, so each site counts equally in overall results for all questions.

<sup>1</sup> Moto chose to only include MSAs in England; Westmorland chose not to take part.

# Key metrics survey

## 31,252 visitors across 119 MSAs.

This survey, conducted by fieldworkers using tablet devices to interview visitors upon exit, gathered three key metrics:

- overall satisfaction
- Net Promoter Score (NPS)<sup>2</sup>
- satisfaction with toilets.

<sup>2</sup> NPS uses the question: On a scale of 0 to 10, how likely would you be to recommend [name of services] services to someone you know making a similar journey? Those saying 9 or 10 are 'Promoters' and those saying 0-6 are 'Detractors'. The NPS is calculated by subtracting percentage of Detractors from percentage of Promoters and so can take any value from -100 to 100.





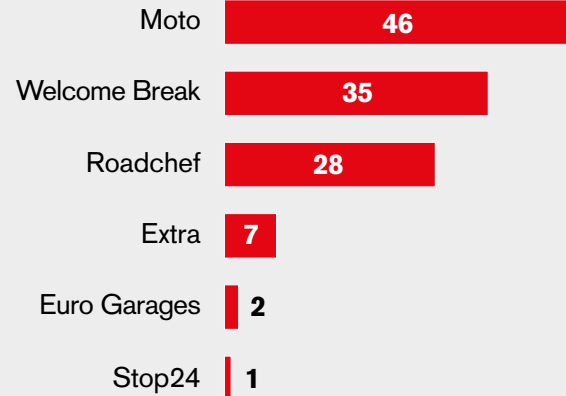
# Detailed experience survey



**5566 visitors across 119 MSAs.**

After the key metrics interview, users were invited to answer additional questions via their preferred method (SMS, email, QR code) or by taking another 6-7 minutes with the interviewer on the tablet.

## Number of MSAs covered in this report per operator





## Contact Transport Focus

Any enquiries about this research should be addressed to:  
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London  
SW1H 9EA  
[www.transportfocus.org.uk](http://www.transportfocus.org.uk)

Transport Focus is the operating  
name of the Passengers' Council

**Transport Focus is the independent consumer organisation representing the interests of:**

- bus, coach and tram users across England outside London
- rail passengers in Great Britain
- all users of England's motorways and major 'A' roads (the Strategic Road Network).

**We work to make a difference for all transport users.**