

Motorway Services User Survey 2022

Overall report

October 2022

transportfocus 

 **BVA** BDRC



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Background and methodology



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 its work, Transport Focus has been tracking how well Motorway Service Areas (MSAs) are meeting the needs of different SRN user groups.

After stopping this project due to the Covid-19 pandemic, Transport Focus engaged BVA BDRC to help them update the methodology of the survey and conduct the survey of user satisfaction with MSAs.

Key objectives:

- Measure user satisfaction across all MSAs
- Understand the effect an MSA has on visitor temperament
- Identify what MSAs can do to improve and the impact of delivering exceptional experiences



The results from this survey should not be compared with previous waves of the MSUS. This is because the methodology of the data collection is different and the fieldwork was carried out at a different time of year.

Methodology

MSUS taking a fresh approach

Overall, MSUS 2022 covered 119 MSAs across England (110), Scotland (five) and Wales (four). Moto chose to only include MSAs in England; Westmorland chose not to take part. Fieldwork ran between 25 May and 17 July 2022. Individual MSAs are equally weighted within the data, meaning each site counts equally towards overall results.



A two part survey

Unlike previous years, the survey 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.

This was done to provide robust scores on the key metrics by maximising the number of respondents intercepted on site, while still providing insight into a wide range of detailed measures.

1. Key metrics interview

The key metrics were collected by fieldworkers using tablet devices to interview visitors upon exit, to achieve in-the-moment recollections of their experience. This short survey gained their views on three key metrics and some context about their visit.

At least 6 x 6.5 hour interview shifts were completed at each individual MSA in 2022.

Across the 119 MSAs we collected 31,252 key metrics surveys.

2. Detailed experience

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

Across the 119 MSAs we collected 5,566 detailed experience surveys.

Number of MSAs covered in this report per operator

 7	 46	 2
 28	 1	 35

Headline findings



Summary of key metrics

Overall satisfaction

The majority (93%) of visitors are satisfied with their visit to MSAs, including 61% stating 'very satisfied'

Among all MSA operators, Euro Garages lead on satisfaction ahead of Extra, and Roadchef

The most satisfied visitors to MSAs are Commuters, followed by Business, with Professional and HGV drivers less satisfied

Peak satisfaction occurs when a visitor stays for 20-30 minutes at the Motorway service

Net Promoter Score

Half (50%) are classified as 'Promoters', with only 15% classified as 'Detractors', producing an overall NPS for all MSAs of +35

Reflecting their higher satisfaction with visitors, the MSA operators with the highest NPS are Extra, Roadchef, and Euro Garages

Extra has a higher NPS than all other MSA operators

The highest NPS for MSAs is among Leisure and Commuter visitors. Professional drivers (including HGV) give a lower NPS

Satisfaction with toilets

82% of visitors to MSAs used the toilets during their visit

88% stated they were satisfied with the toilets, with 6% dissatisfied and 5% undecided. Top performing operators in this category are Roadchef and Extra

Welcome Break, Stop24 and EuroGarages have significantly lower ratings than average for their toilets

Those most satisfied with toilets are Commuters and 16-34 year olds. Lower satisfaction among Business, Professionals, HGV drivers, and Disabled visitors

Other findings

Detailed satisfaction with MSAs

The majority of visitors state that the signs, roads, and parking areas are good

The safety and security and the walk to the buildings within the MSA are mostly good

Ratings for cleanliness, ventilation, and range of facilities are mostly good (80%+ for all MSAs)

Ratings from Professional and HGV drivers are considerably lower for quality of road surfaces, layout of parking area, safety and security of vehicle left in car park and the walk from the car park to the building

Food and drinks

The highest ratings for the food and drink services within the MSAs are for availability of tables to sit down at and for the friendliness and helpfulness of the staff with two-thirds rating very good

There are also high ratings for the length of time it took to get food / drinks and the quality of the food / drink

Perceptions of value for money are lower for both eat in and take away

Improvements

Ratings are generally lower for value for money across the various areas

But also HGV facilities receive lower ratings compared to other aspects

Car parking facilities receive most comments for improvement

Respondent profile

Findings from the key metrics survey



Respondent profile

For the key metrics participants

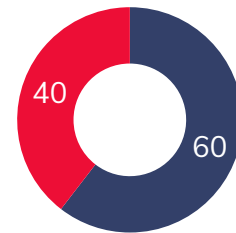
The majority (68%) of respondents are travelling for leisure, followed by business (15%), and professional (11%)

HGV drivers account for 9% of respondents and those commuting just 5%

60% of respondents are male and there is a good range of age groups with 40% being between 35-54 years of age



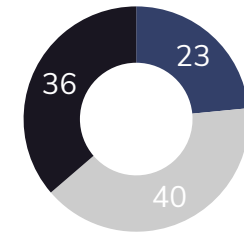
Gender (%)



ALL MSA 2022

■ Male ■ Female

Age (%)



ALL MSA 2022

■ 16-34 ■ 35-54 ■ 55+

Satisfaction and recommendation

Findings from the key metrics survey



Overall satisfaction with MSAs

Overall satisfaction

Summary

The majority (93%) are satisfied with their visit, including 61% stating 'very satisfied'

The top performing services with 99%+ satisfied include Rugby (Moto), Donington Park (Moto), Blackburn with Darwen (Extra), Strensham Northbound (Roadchef) and Medway Eastbound (Moto)

Those services with the lowest satisfaction are Hartshead Moor Eastbound (Welcome Break), Lancaster Southbound (Moto), Charnock Richard Southbound, Birchanger Green and Warwick Southbound (all Welcome Break)



All MSAs for 2022

Visitors' satisfaction at All MSAs

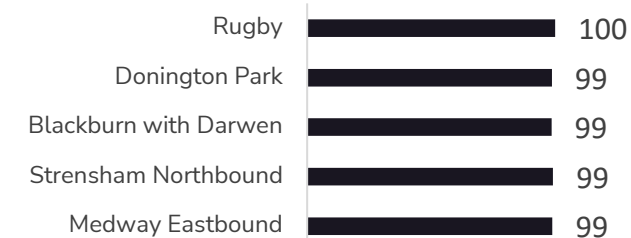
Overall satisfaction with MSA (%)



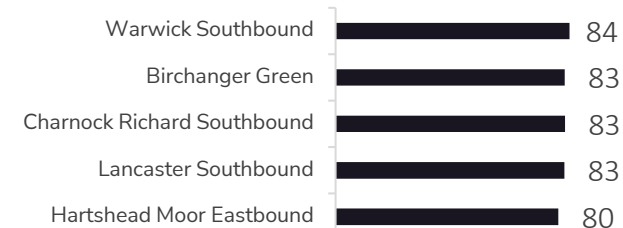
61% Very satisfied
 32% Fairly satisfied
 4% Neither
 2% Fairly dissatisfied
 1% Very dissatisfied

Total satisfied (%)

Highest rated MSAs



Lowest rated MSAs



Overall satisfaction

Operator comparison

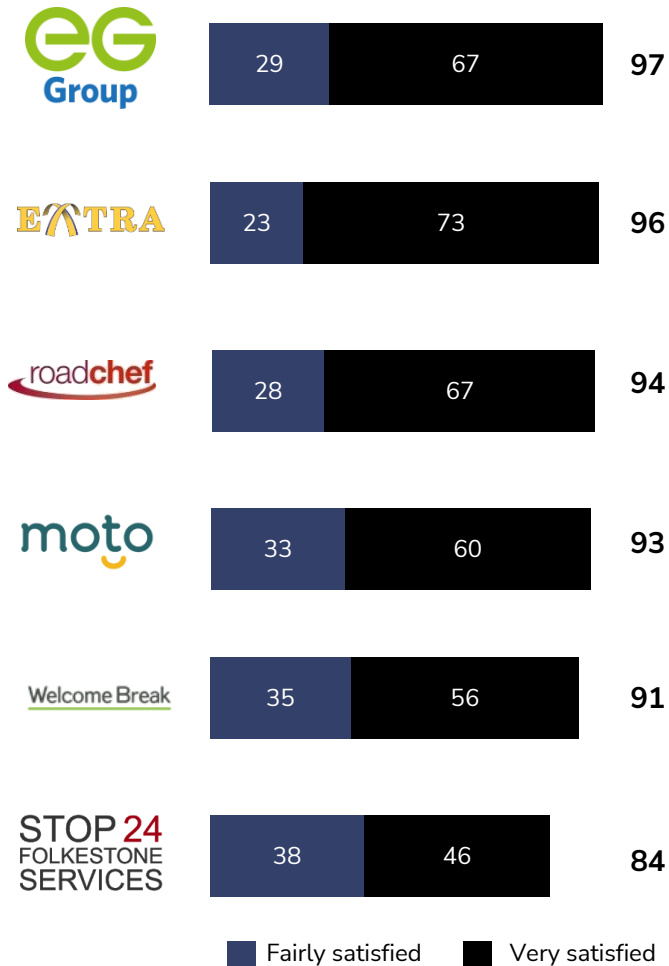
The top performing operators are Euro Garages, Extra and Roadchef

Welcome Break and in particular Stop24 have fewer in the 'very satisfied group'



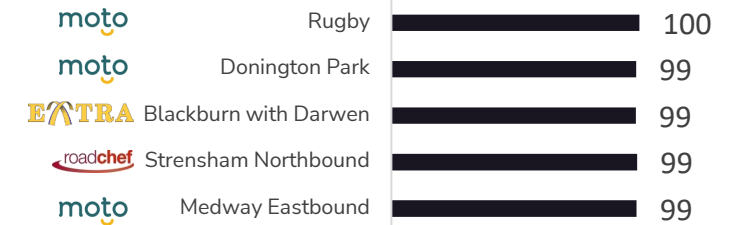
All MSAs for 2022

Visitors' satisfaction across operators (%)

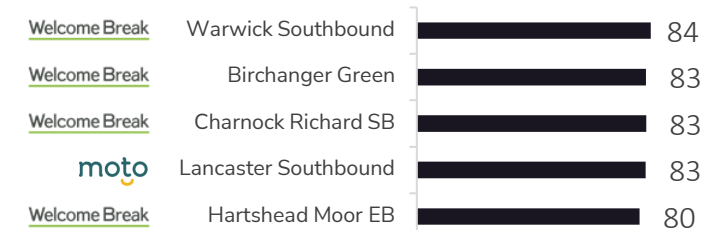


Total satisfied (%)

Highest rated MSAs



Lowest rated MSAs

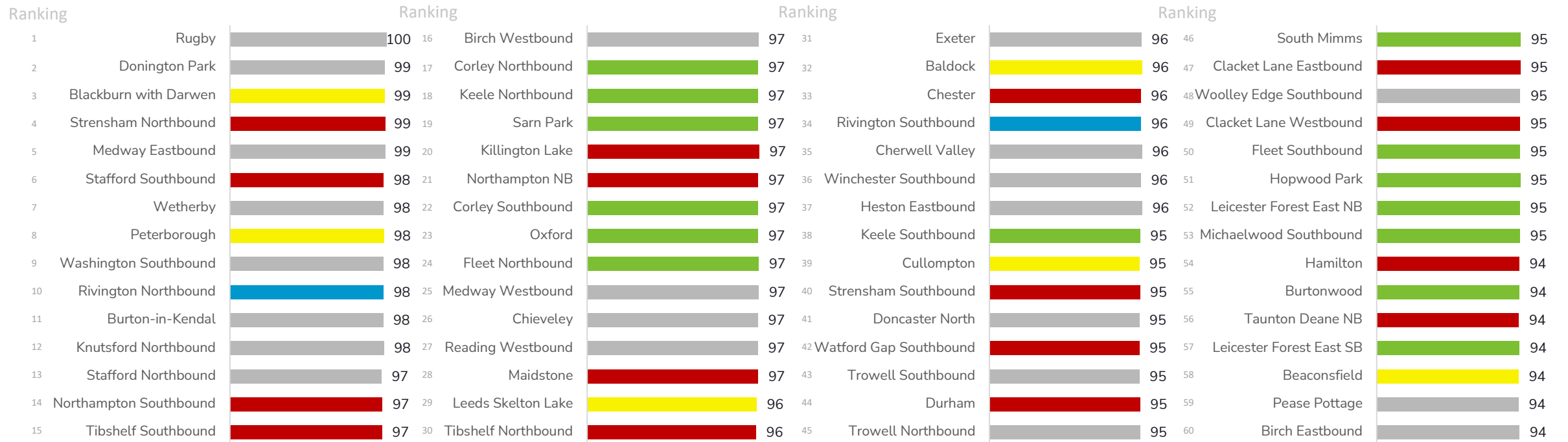




Total satisfied (%)

Overall satisfaction

All MSAs across GB

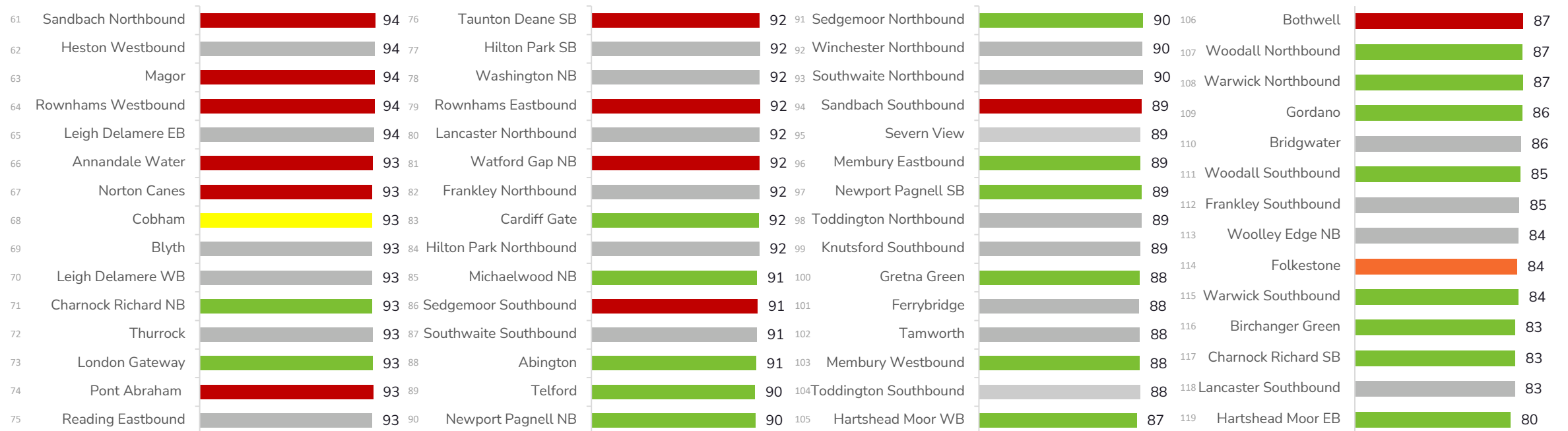




Total satisfied (%)

Overall satisfaction

All MSAs across GB



Overall satisfaction

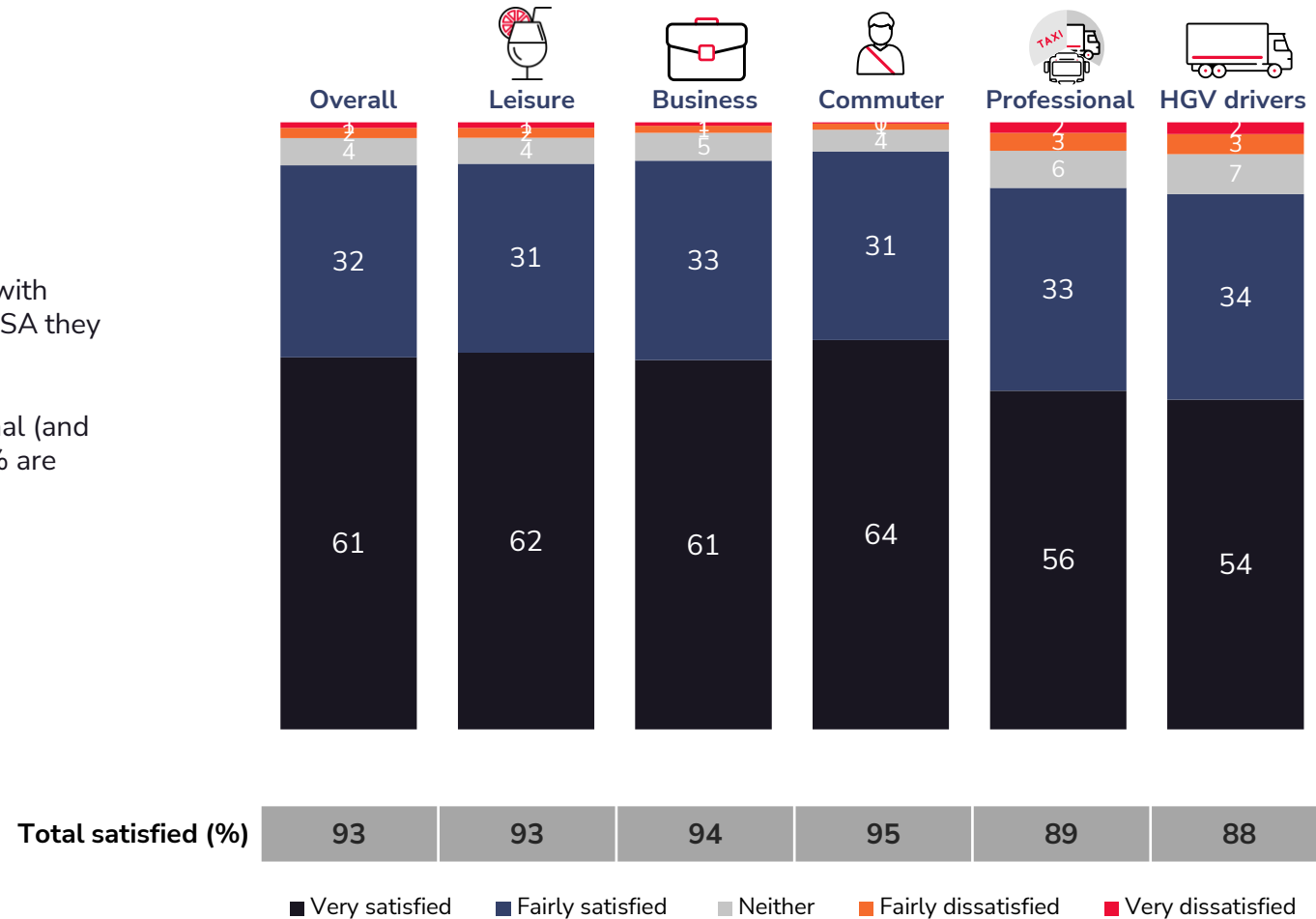
Visitor type

The most satisfied visitors are commuters with almost two thirds very satisfied with the MSA they visited

Somewhat less satisfied are the professional (and within them HGV) drivers where 11%-12% are less than satisfied

Key demographic groups

Overall satisfaction with MSA (%)



Overall satisfaction

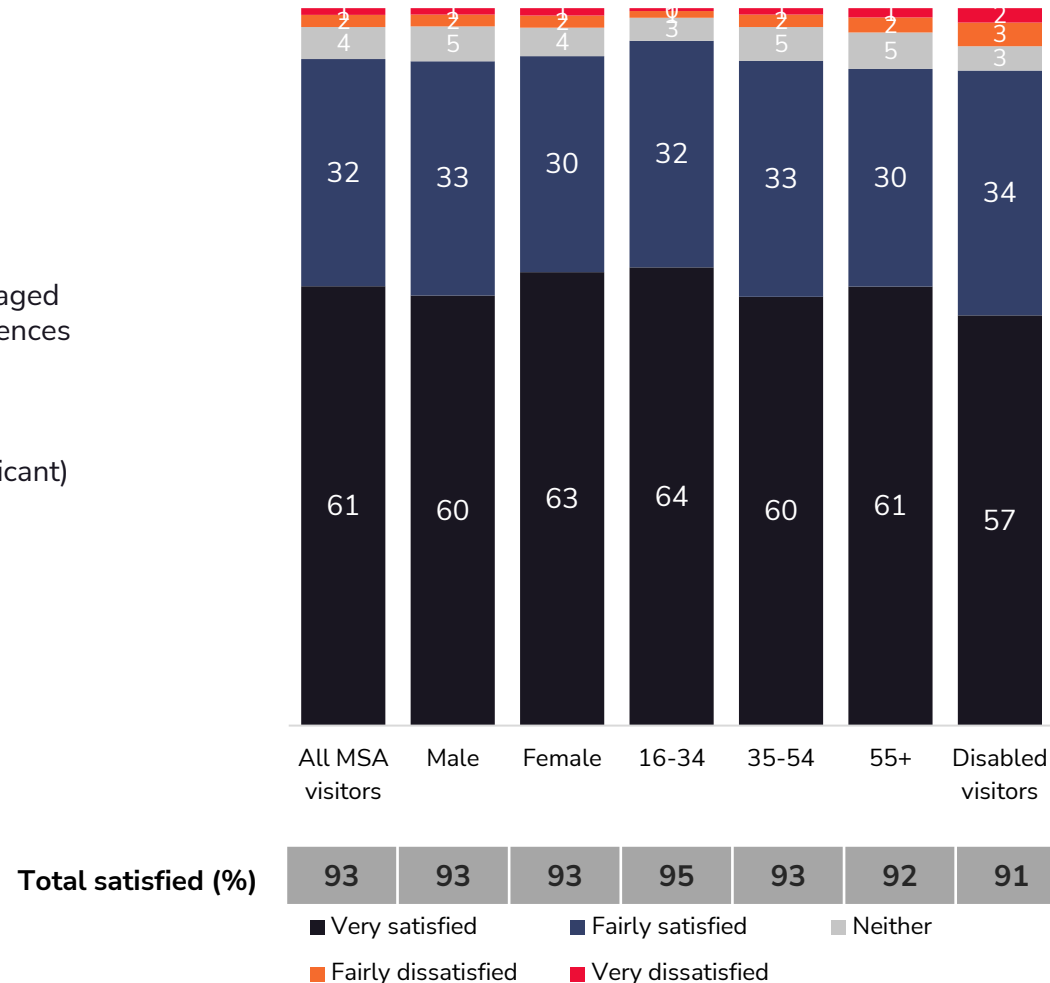
Demographics

The more satisfied visitors to MSAs are aged 16-34, although the demographic differences are quite small

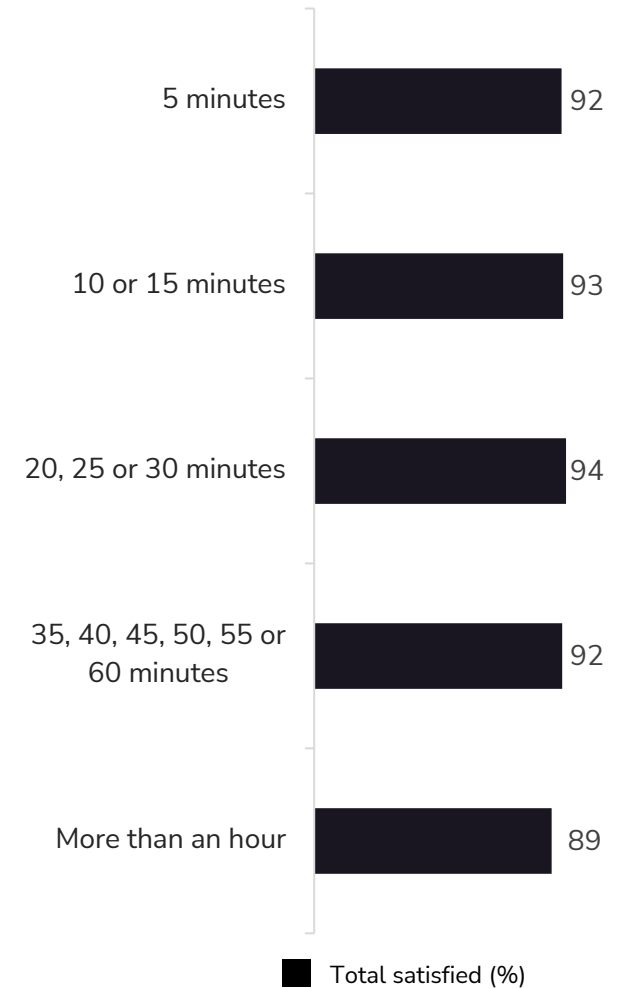
Disabled visitors report a slightly lower satisfaction score (not statistically significant)

Key demographic groups

Overall satisfaction with MSA (%)



Overall satisfaction by time spent at MSA (%)*



*Time spent was only asked in 5 minutes bands. R3 Overall, how satisfied are you with your experience at MSA services today? All MSAs: 31,204; Male: 18,751; Female: 12,402; 16-34: 7,262; 35-54: 12,443; 55+: 11,462; Disabled visitors: 602; 5 min: 5,176; 10 or 15 mins: 10,303; 20, 25 or 30 mins: 10,708; 35, 40, 45, 50, 55 or 60 min: 3,995; 60+ min: 1,022.

Likelihood to recommend MSA

Likelihood to recommend MSA

Summary

Half (50%) are 'Promoters' with 15% classified as 'Detractors' (a score of 0-6), producing an overall NPS score for all MSAs of +35

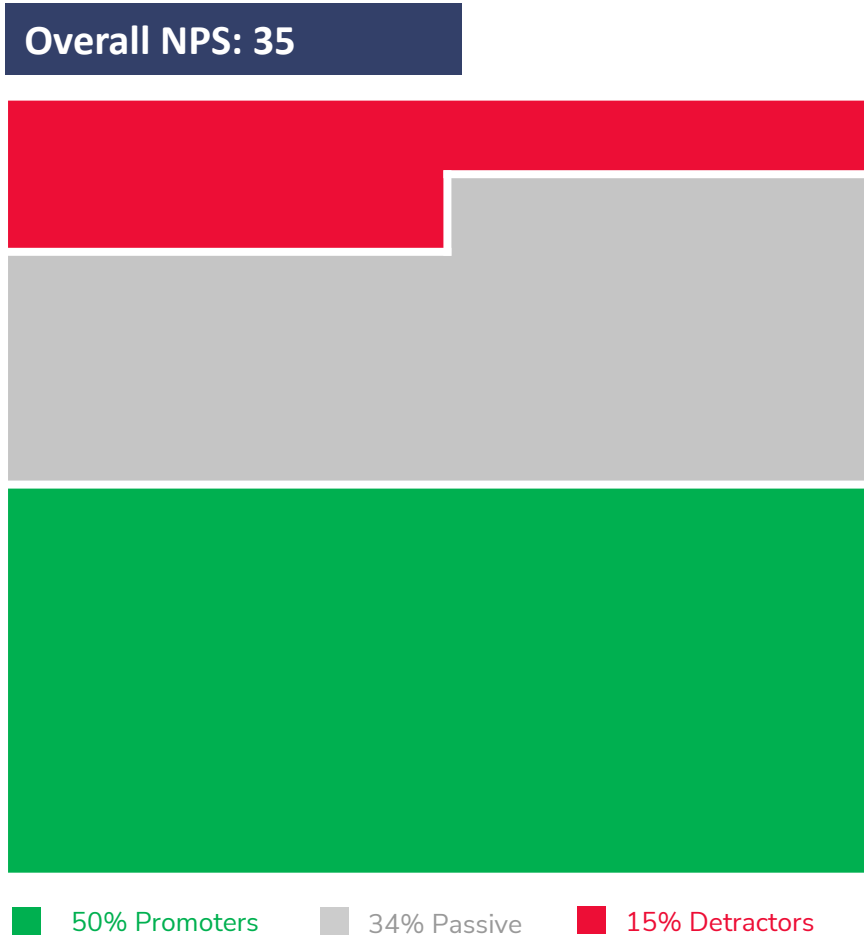
The highest NPS scores are found at Rugby (Moto), Annandale Water (Roadchef), Leeds Skelton Lake (Extra), Donington Park (Moto), and Stafford Southbound (Roadchef).

The worst performing services on NPS are Frankley Southbound, Lancaster Southbound, Knutsford Southbound, Bridgwater (all Moto) and Hartshead Moor Eastbound (Welcome Break) – all of them with negative scores

'Promoters' are those giving a score of 9 or 10
'Detractors' give a score of 0-6

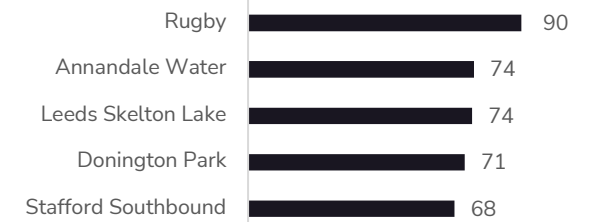
Visitors' recommendation of All MSAs

Recommendation: Net Promoter Score (promoters minus detractors)

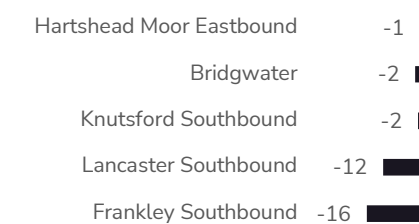


Net Promoter Score

Highest rated MSAs



Lowest rated MSAs



Likelihood to recommend MSA

Operator comparison

Reflecting their higher satisfaction with visitors, the operators with the highest NPS are Extra, Roadchef, and Euro Garages.

Extra has an exceptionally high NPS score

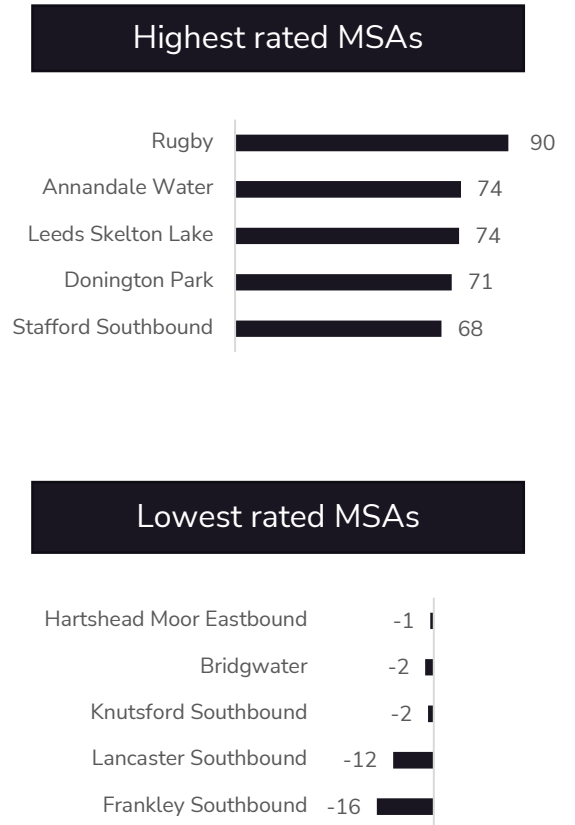


NPS
All MSAs for 2022

Visitor NPS across operators



Net Promoter Score

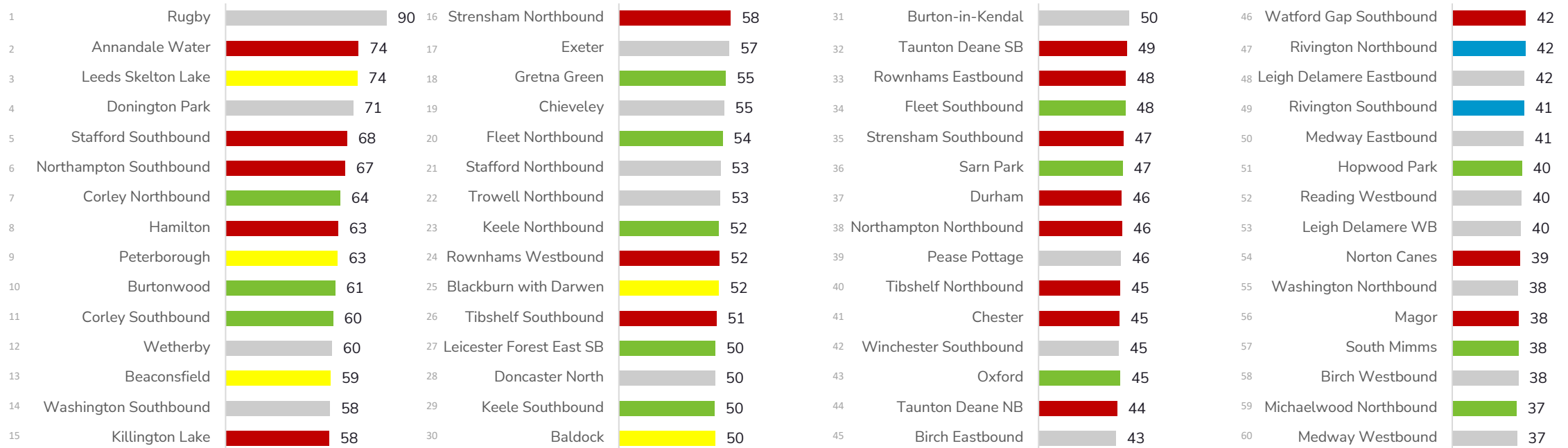




Net Promoter Score

Likelihood to recommend MSA

All MSAs across GB

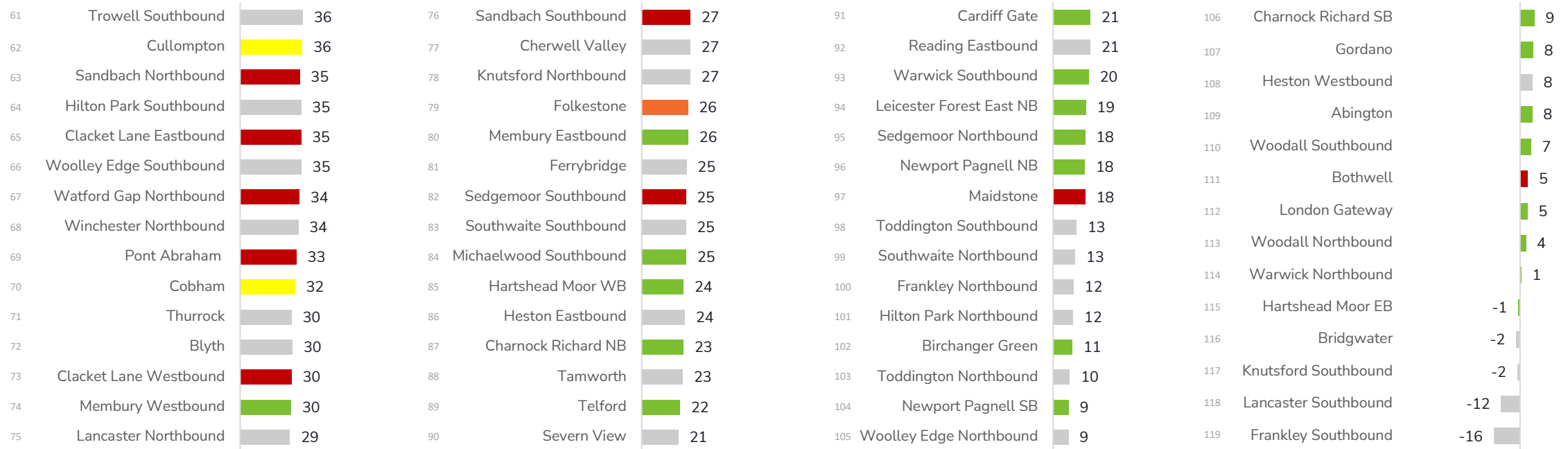




Net Promoter Score

Likelihood to recommend MSA

All MSAs across GB

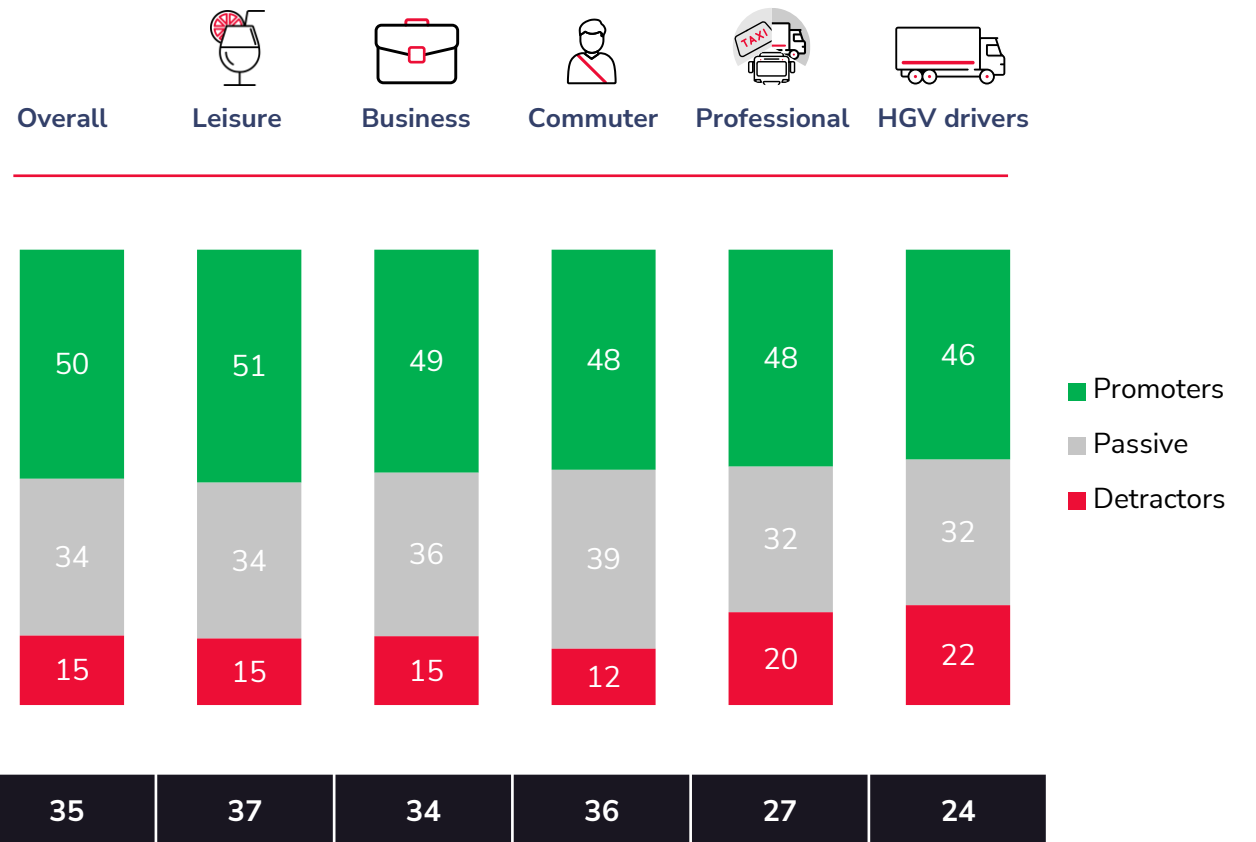


Likelihood to recommend MSA

Visitor type

NPS is highest with Leisure and Commuter visitors to MSAs – few commuters fall into the Detractor category

Professional (and within them HGV) drivers give lower NPS compared to other visitor types, but their NPS is still extremely positive

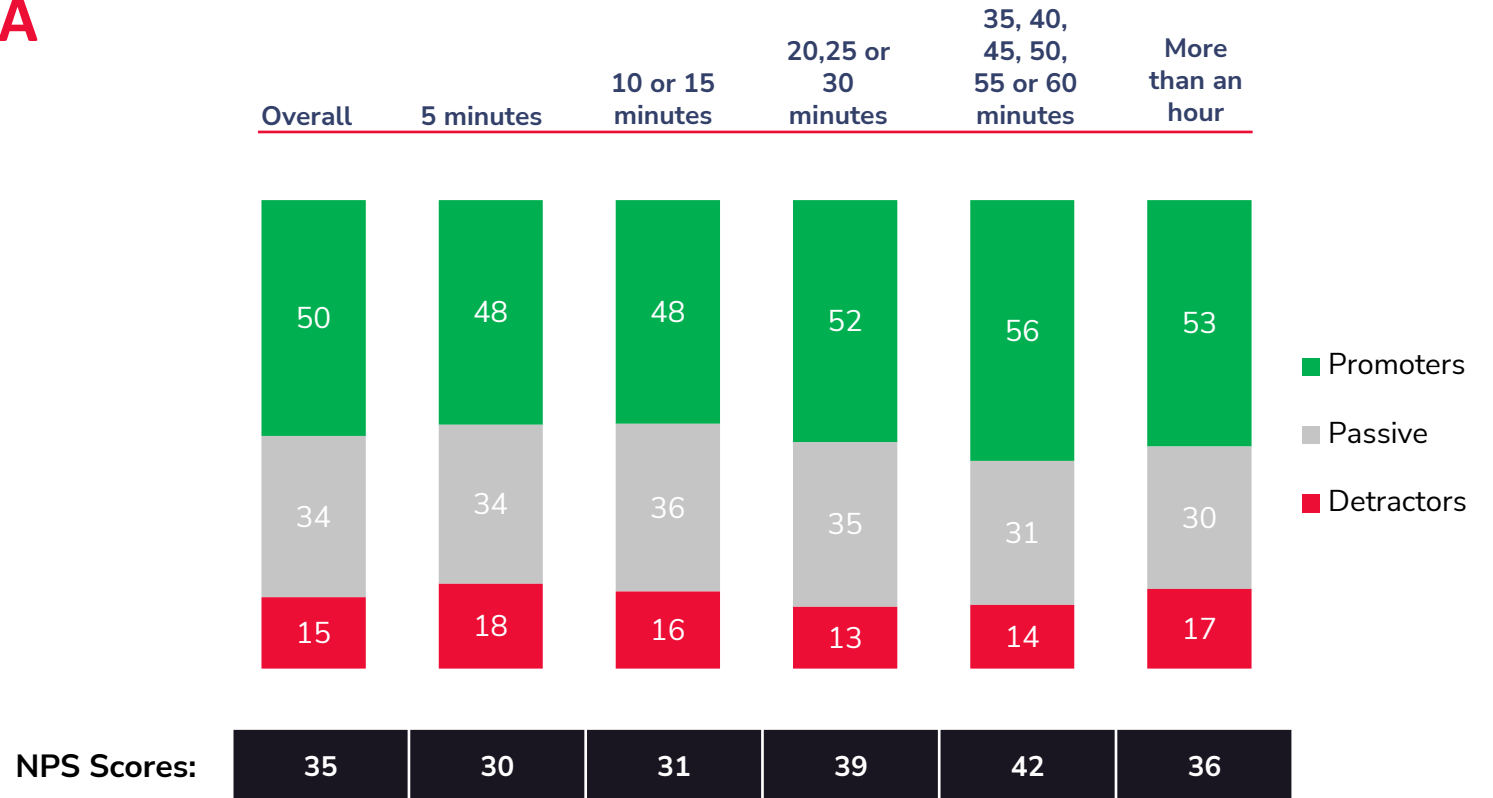


Likelihood to recommend MSA

Time spent at MSA

NPS is highest for those who spent 35 to 60 minutes at the MSA

NPS by time spent at MSA*



*Time spent was only asked in 5 minutes bands. R4. On a scale of 0 to 10, how likely would you be to recommend MSA services to someone you know making a similar journey? All MSAs: 31,252; 5 min: 5,195; 10 or 15 min: 10,313; 20, 25 or 30 min: 10,719; 35, 40, 45, 50, 55 or 60 min: 4,001; 60+ min: 1,024.

Likelihood to recommend MSA

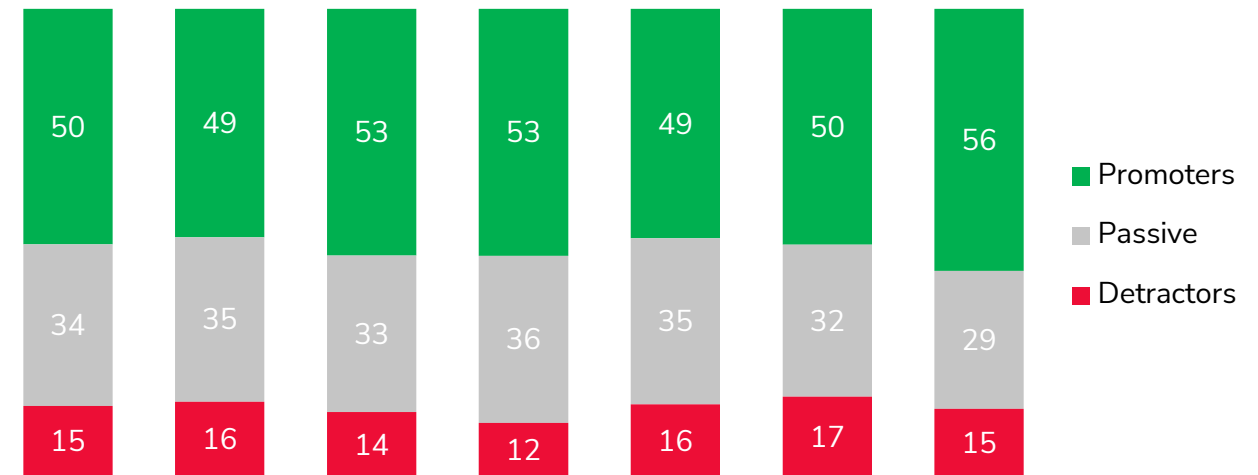
Key demographic groups

Females and younger age groups give MSAs a higher NPS

Although satisfaction ratings were slightly below average among the disabled visitors, they actually give a higher NPS than average

NPS by demographic groups

Overall Male Female 16-34 35-54 55+ Disabled visitors



NPS Scores:



Satisfaction with toilets at MSAs

Satisfaction with the toilets



Summary

82% of visitors to motorway services used the toilets during their visit

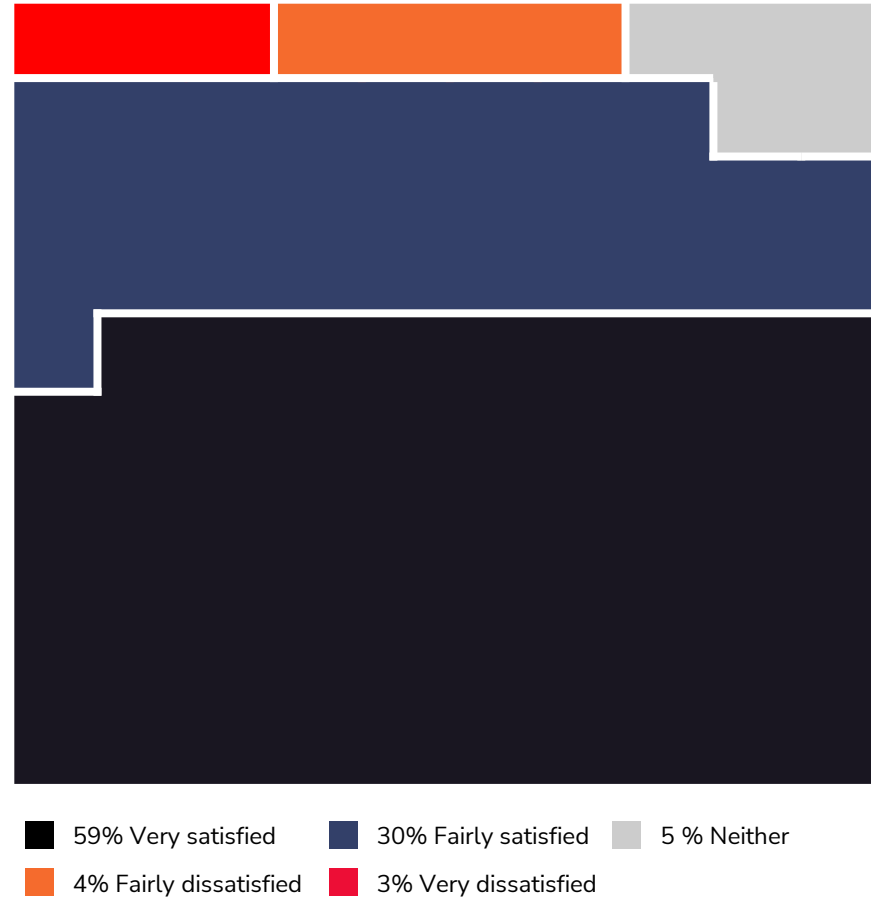
88% were satisfied with the toilets, with 6% dissatisfied and 5% undecided



All MSAs for 2022

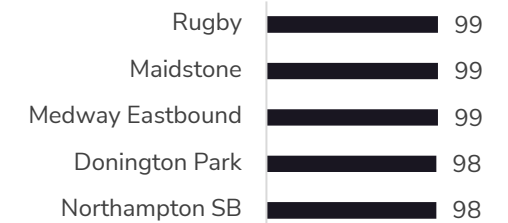
Visitors' satisfaction with toilets at all MSAs

Overall satisfaction with MSA toilets (%)



Total satisfied (%)

Highest rated MSAs overall



Lowest rated MSAs overall



Satisfaction with the toilets



Operator comparison

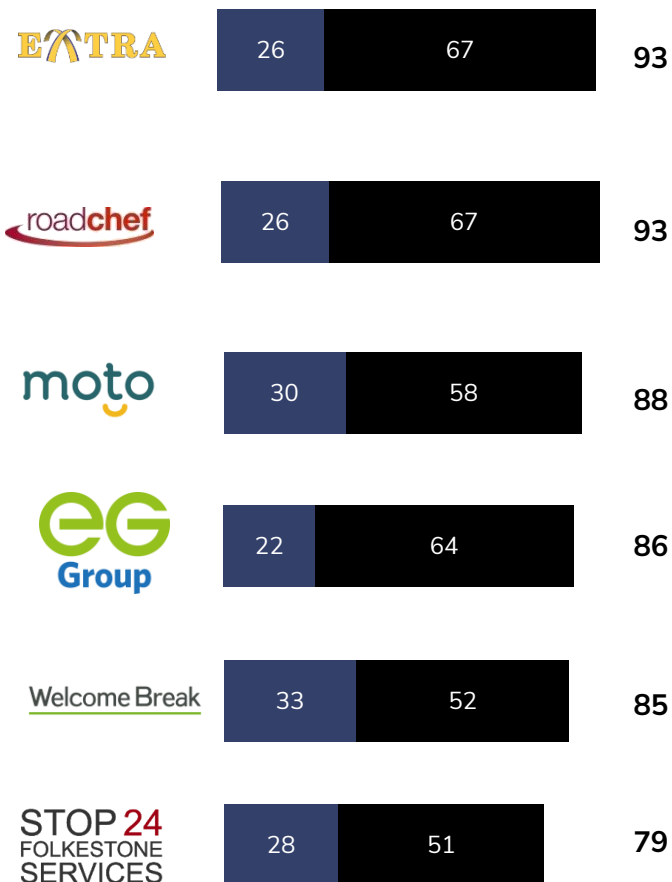
Top performing operators in this category are Extra and Roadchef

Welcome Break and Stop24 have significantly lower ratings than average for their toilets



All MSAs for 2022

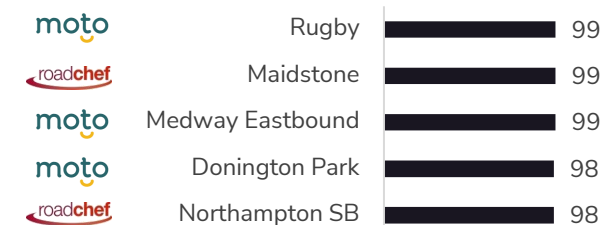
Visitors' satisfaction with toilets across operators (%)



■ Fairly satisfied ■ Very satisfied xx Total satisfied

Total satisfied (%)

Highest rated MSAs overall



Lowest rated MSAs overall

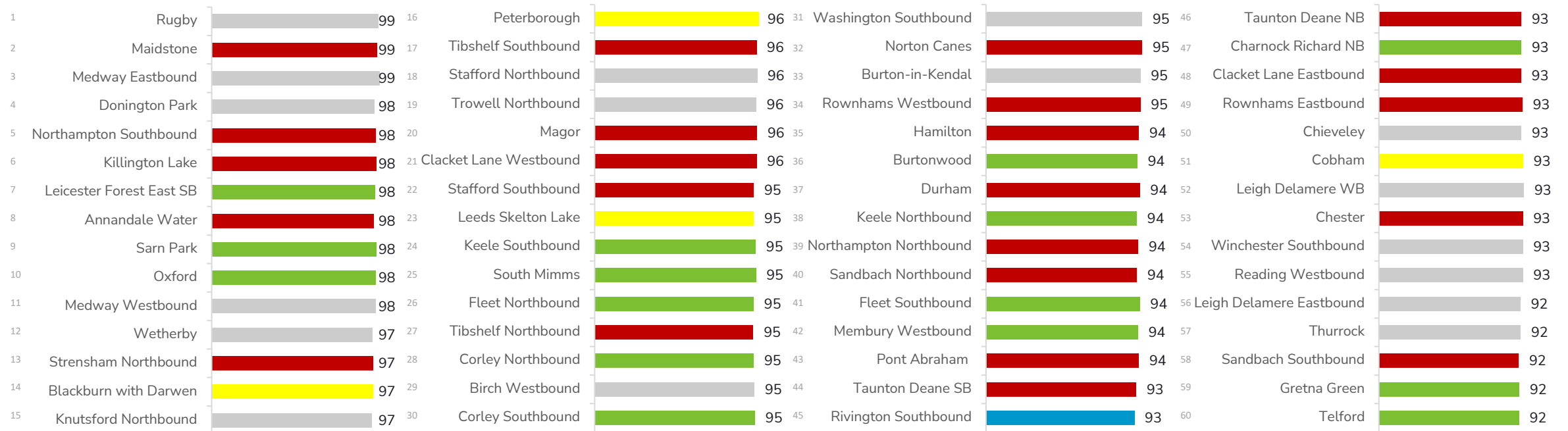




Total satisfied (%)

Satisfaction with the toilets

All MSAs across GB

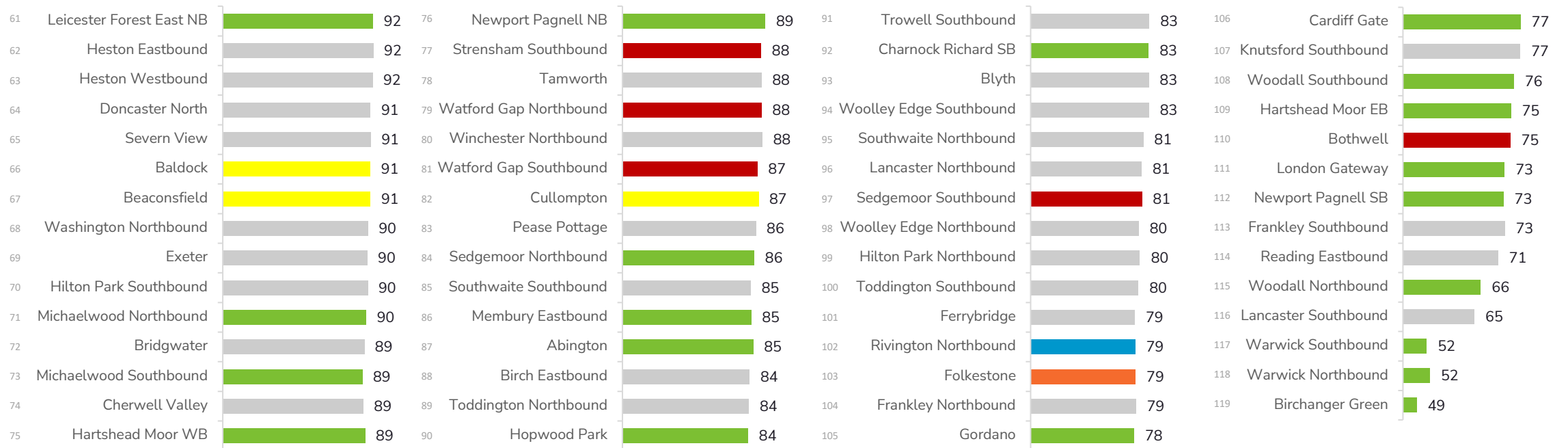




Total satisfied (%)

Satisfaction with the toilets

All MSAs across GB



Satisfaction with the toilets



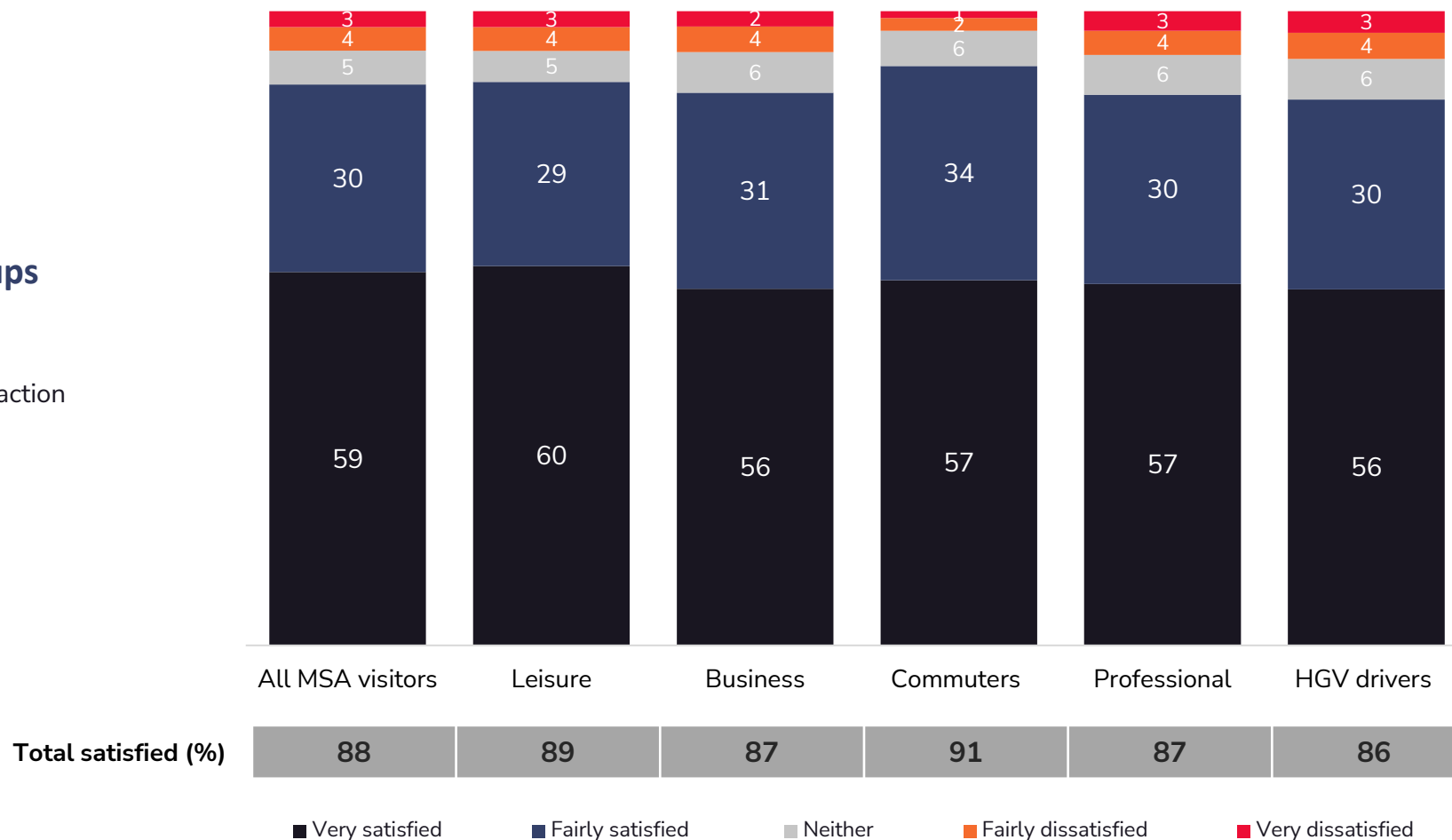
Key audience groups

Commuters have the highest satisfaction with toilets

HGV drivers have slightly lower satisfaction with toilets

Visitor type

Satisfaction with MSA toilets (%)



Satisfaction with the toilets

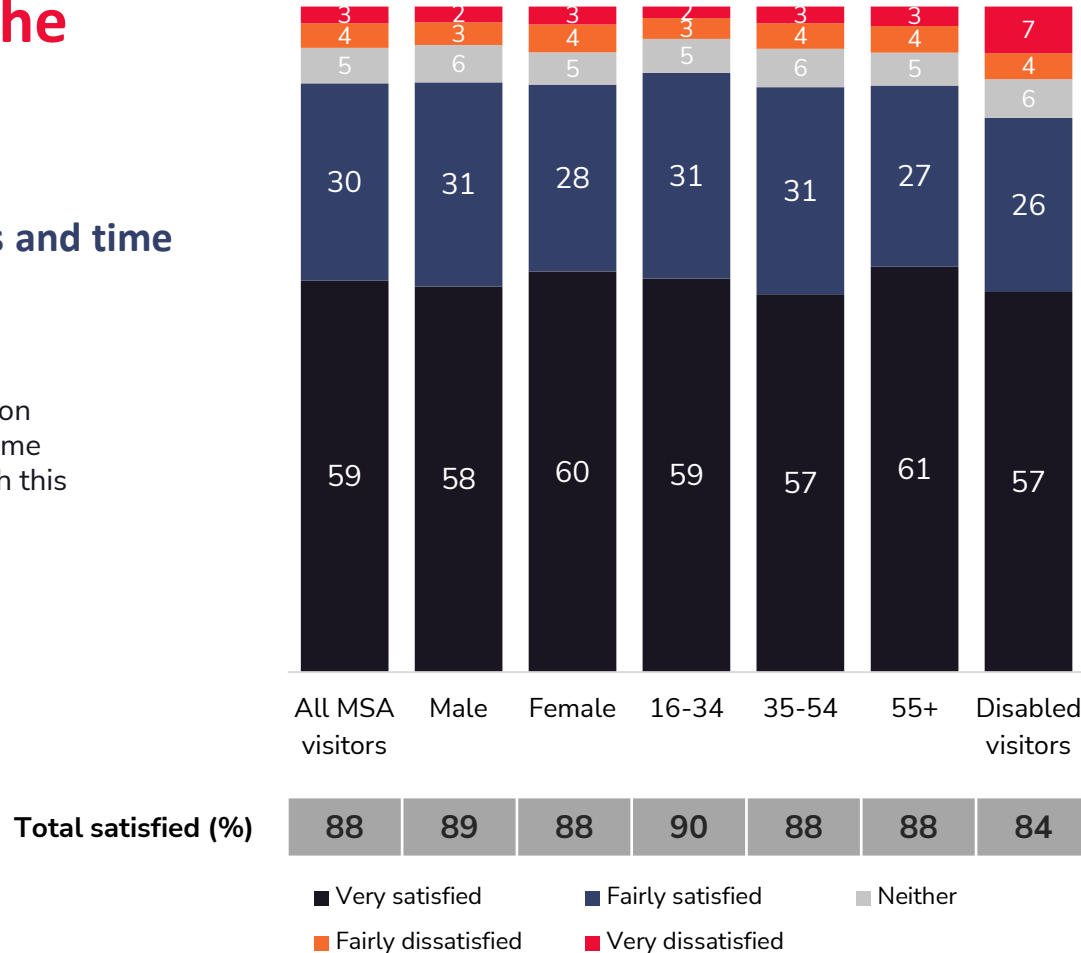


By key demographics and time spent at MSA

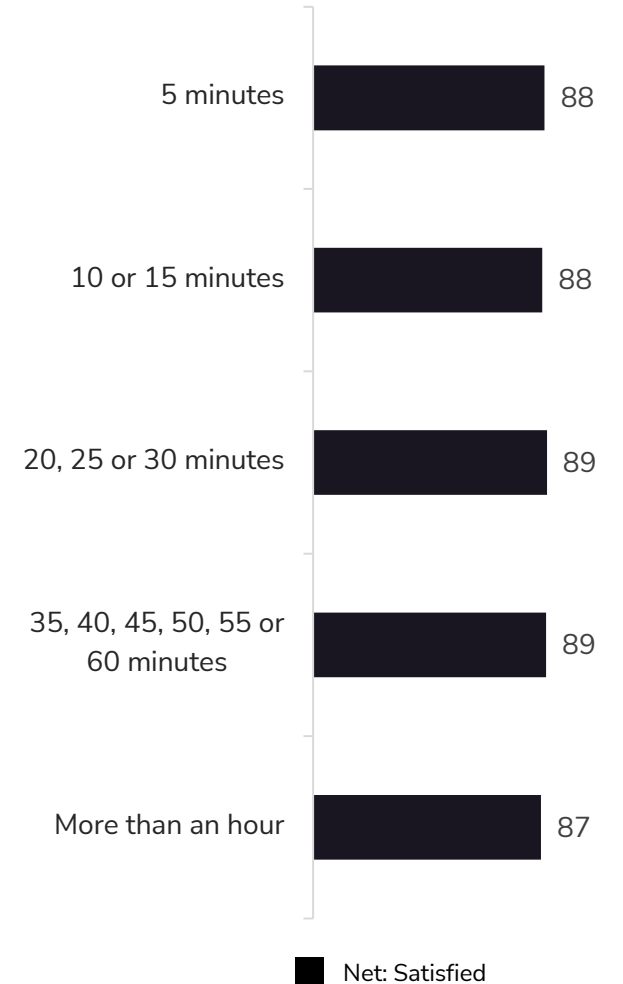
Disabled visitors have lower satisfaction (17% less than satisfied) indicating some issues in the use of these facilities with this group

Key demographics

Satisfaction with MSA toilets (%)



Toilet satisfaction by time spent at MSA (%)*



*Time spent was only asked in 5 minutes bands - R14. And using the same scale, how satisfied were you with the toilets here today? All MSA visitors: 25,908 ; Male: 15,346; Female: 10,524; 16-34: 5,703; 35-54: 10,409; 55+: 9,761;. Disabled visitors: 516; 5 min: 4,070; 10 or 15 min: 8,595; 20, 25, or 30 min: 8,963; 35, 40, 45, 50, 55 or 60 min: 3,414; 60+ min: 866.

Part 2 – detailed experience

Findings from the detailed experience survey



Reasons for stopping at MSA

Reasons for stopping at MSAs

Visitor type

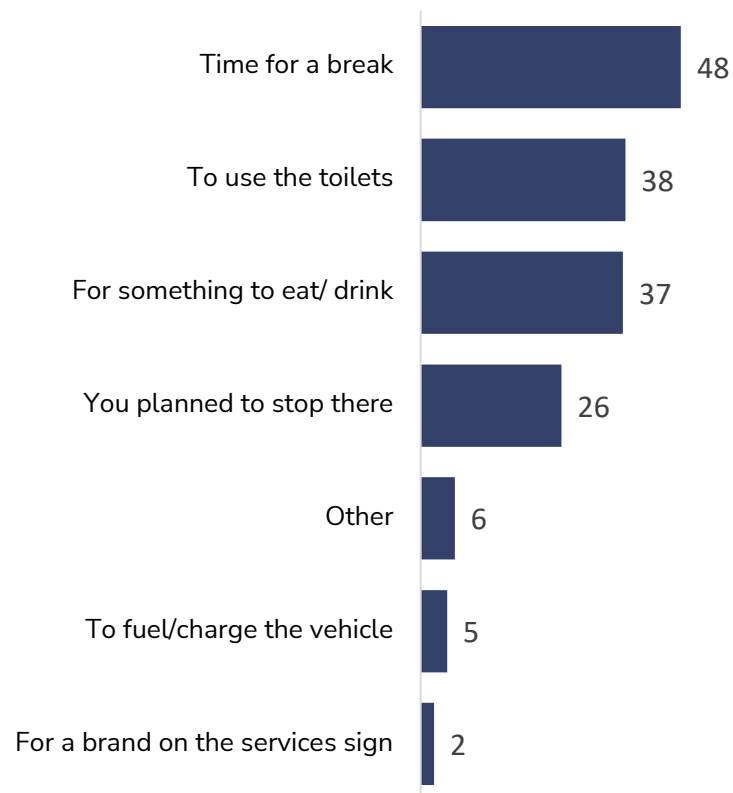
74% of visitors to MSAs had made a spontaneous stop, 26% had intended to go there (notably higher amongst Professionals)

The main reasons to stop there are to take a break, to use the toilets and to get a meal / drink, and – NOTE: the number actually using the toilets is higher at 82%

Very few say that fuelling or charging is one of the reasons they stopped

Similarly, very few are motivated to use a specific brand within MSAs as a reason to stop there

Reasons visitors stopped at MSA (%)



	Leisure	Business	Commuter	Professional	HGV drivers
Time for a break	48	42	33	59	61
To use the toilets	42	31	30	25	22
For something to eat/ drink	40	37	40	23	20
You planned to stop there	24	24	27	35	36
Other	6	5	9	8	9
To fuel/charge the vehicle	5	7	4	2	2
For a brand on the services sign	2	3	5	2	2

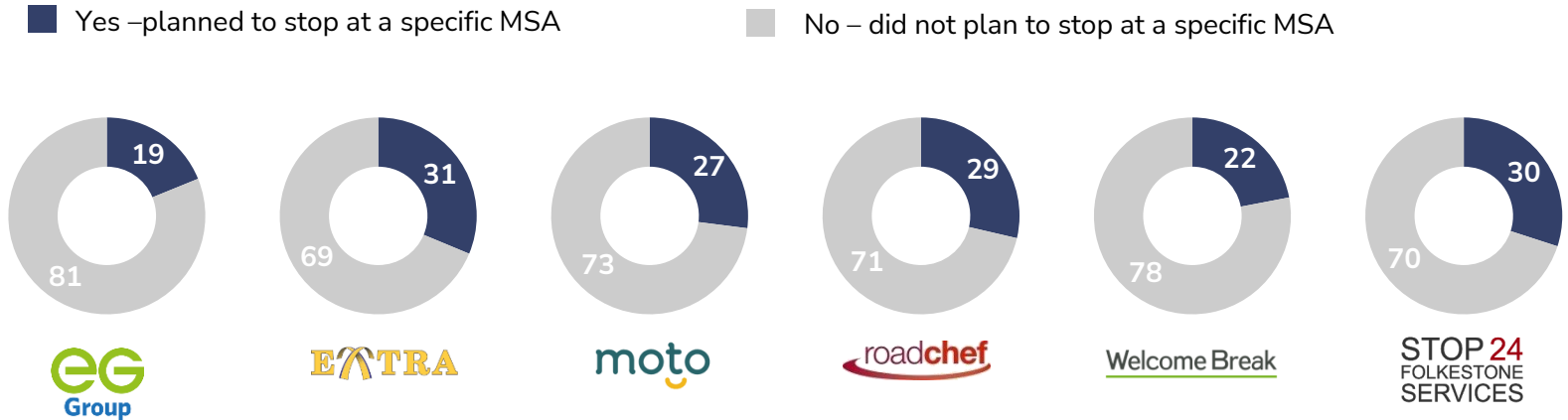
Reasons for stopping at MSAs

Whether planned to stop - operator comparison

For some operators, more visitors plan to stop there, higher with Extra, Stop24, and Roadchef, far less for Euro Garages

Some factors can encourage visitors to use MSAs or even the brands – good services will encourage repeat usage plus the location plays a significant role

Whether planned to stop at a specific MSA (%)



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

"We travel between Cornwall and South Wales around 20 times per annum. We usually stop at Taunton Deane services." **Taunton Deane Northbound**

"Because I'm going to Immingham. We have an account with Moto." **Doncaster North**

"Always stop at this service station whenever travelling South and North." **Warwick Northbound**

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

"Picking my grand daughter up; it was a good meeting place." **Chester**

Brand impact on stopping at MSA

Summary

Only a small proportion (3%) are motivated to visit an MSA because of specific brands within the motorway services

Costa Coffee has the strongest brand appeal, with a quarter (26%) stopping at an MSA for this brand

3% stopped at the MSA because of a specific brand

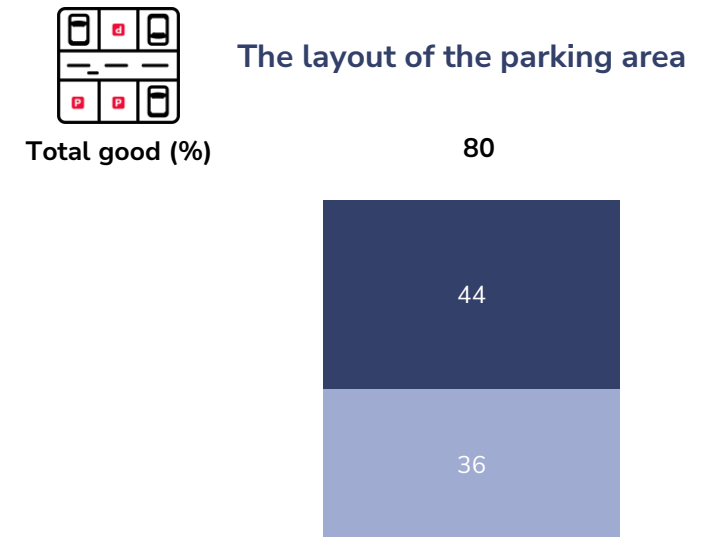
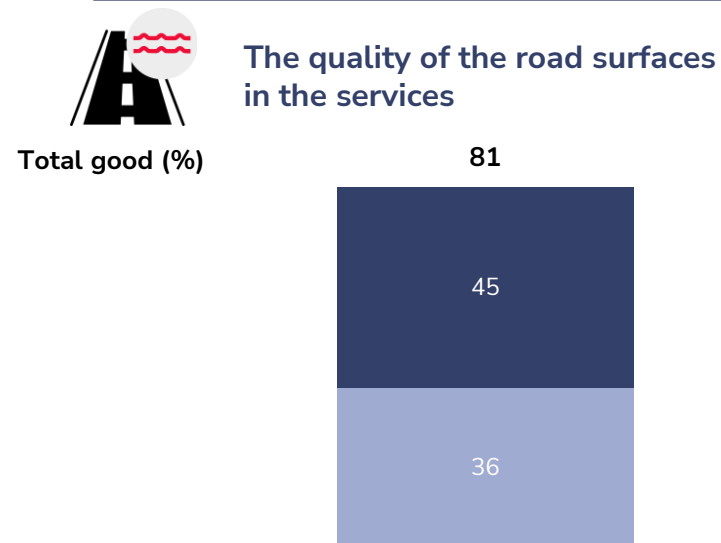
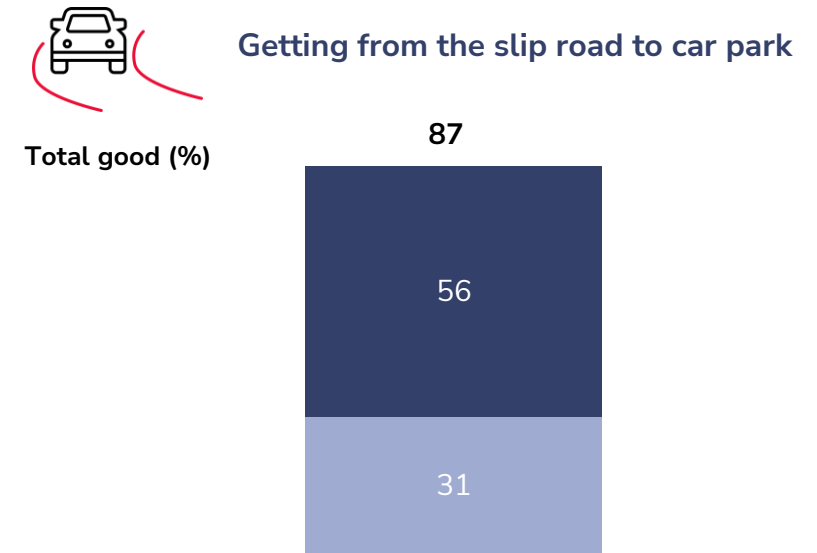
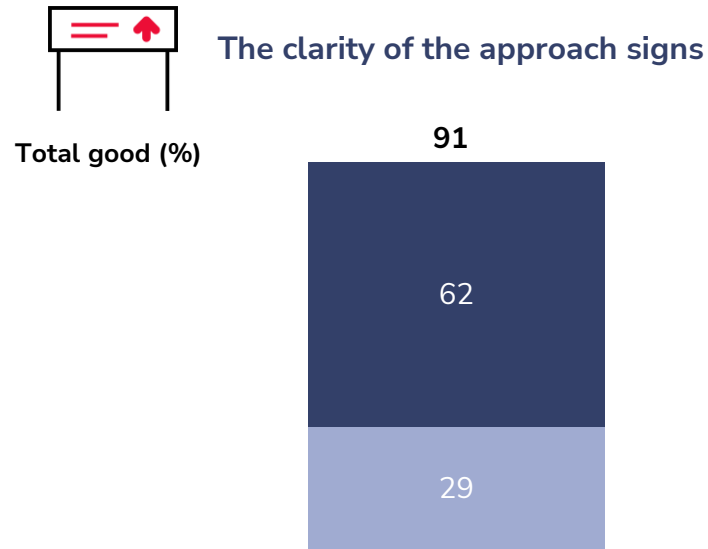


Top 5 brands mentioned (in order of highest mentions)	(%)
Costa Coffee	26
McDonald's	14
Starbucks	12
Greggs	9
Burger King	7

Arrival at MSA

Ratings for approach to MSA (1)

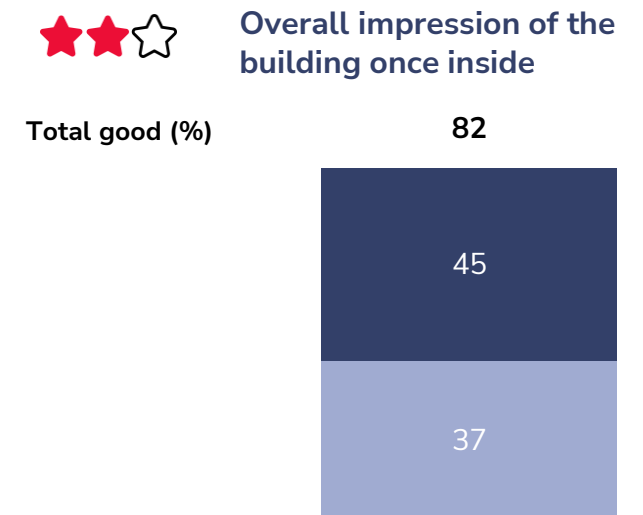
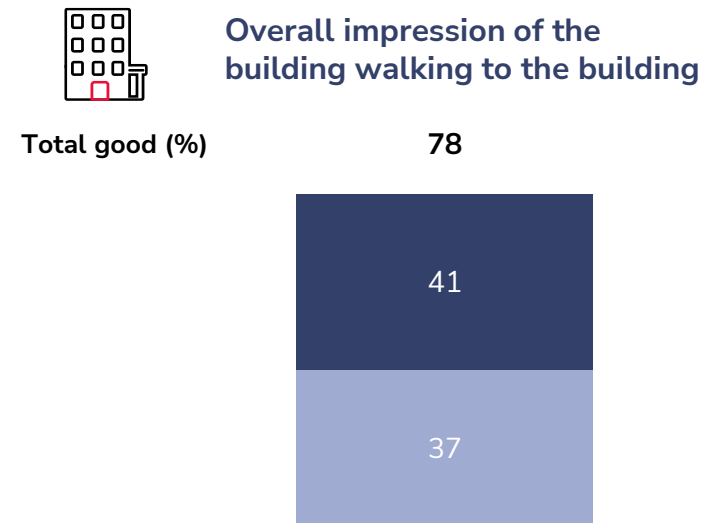
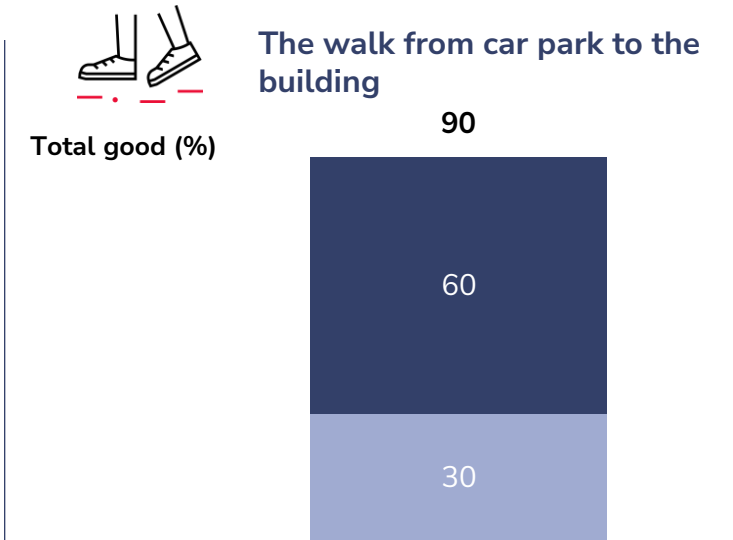
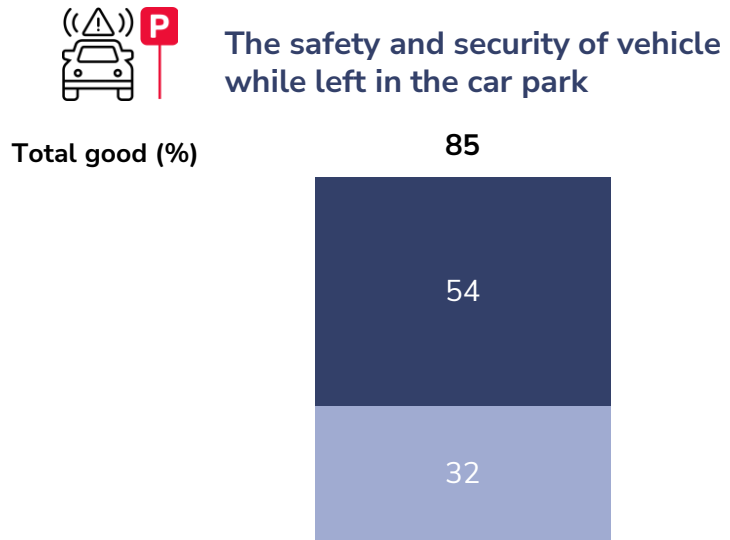
The majority of visitors state that the signs, roads, and parking areas are good



Very good Fairly good

Ratings for approach to MSA (2)

The safety and security and the walk to the buildings within the MSA are mostly rated good



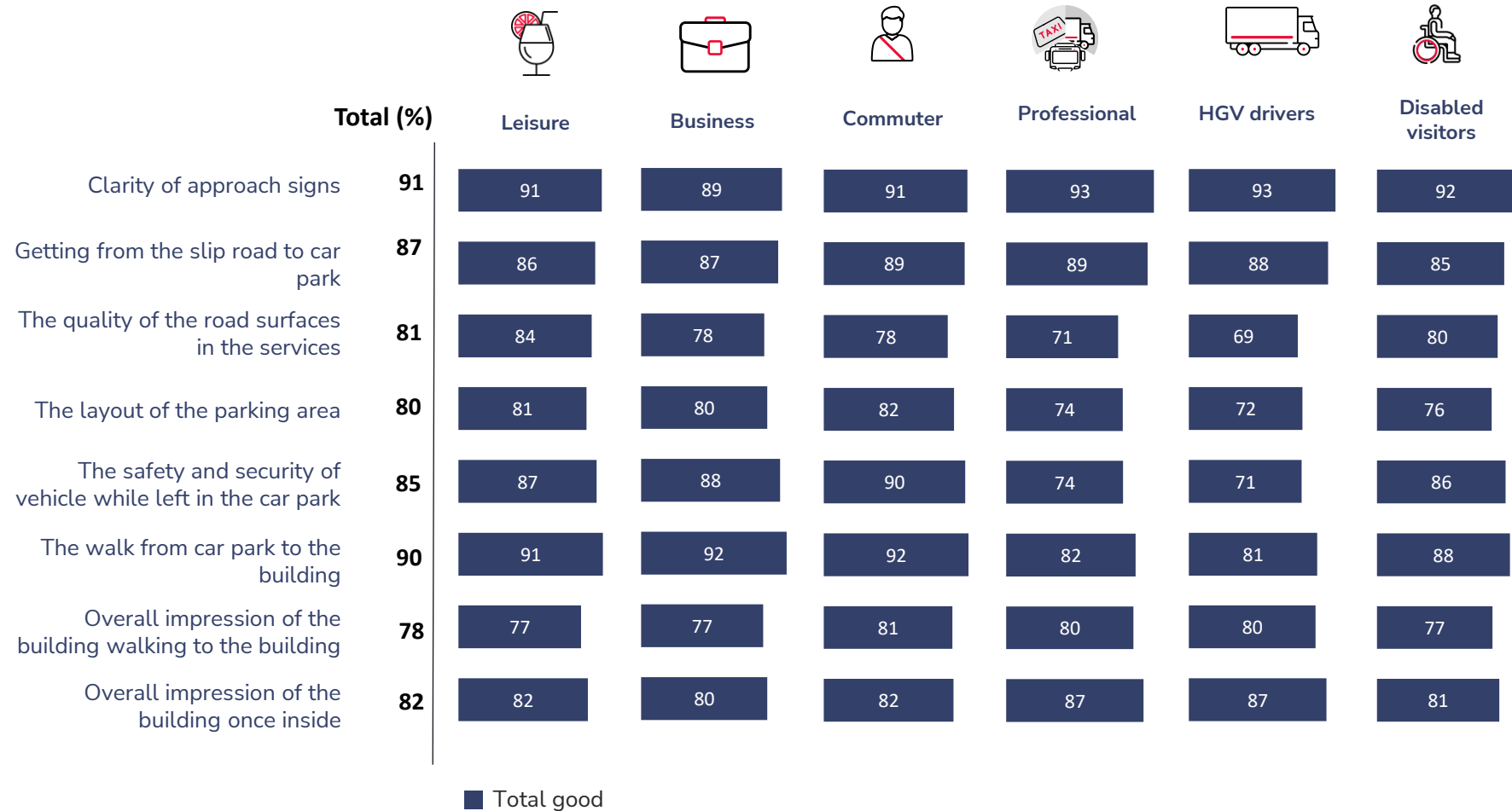
Very good Fairly good

Ratings for approach to MSA (3)

Visitor type

Ratings from Professional and HGV drivers are considerably lower for quality of road surfaces, layout of parking area, safety and security of vehicle left in car park and the walk from the car park to the building

But they give notably higher ratings for the overall impression of the building once inside



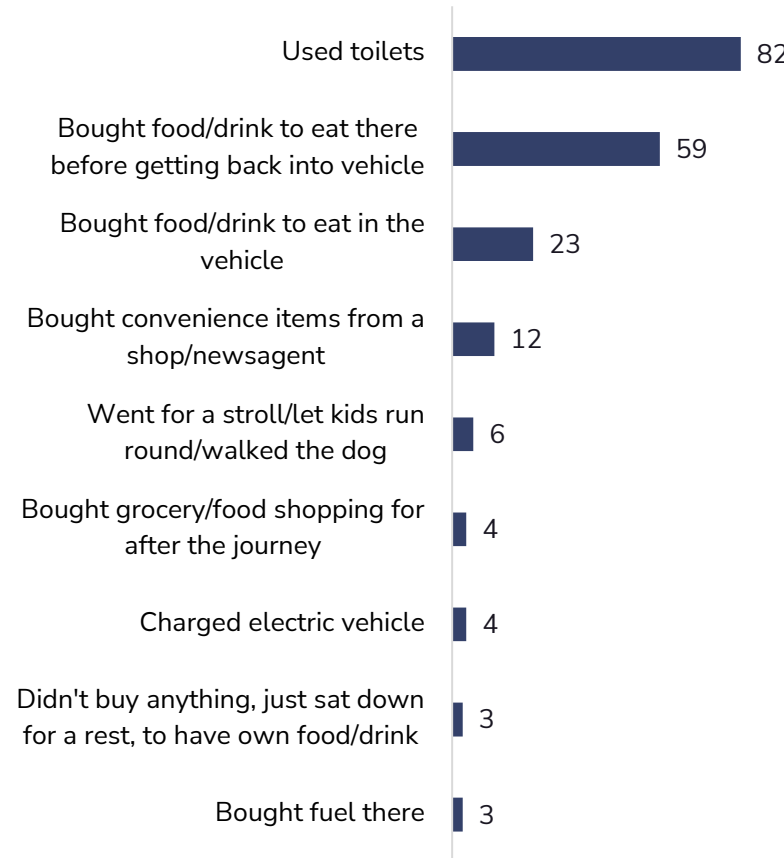
What visitors did at MSA

What visitors did at MSA

The primary motives to use the MSA are to use toilets and to buy food and drink, mostly to eat-in within the MSA itself, although some choose to have it within their vehicles

A minority shop at the MSAs, and even fewer use it to refuel or charge

What visitors did at MSAs (%)



	Leisure	Business	Commuter	Professional	HGV drivers	Disabled visitors
Used toilets	84	77	66	83	83	86
Bought food/drink to eat there before getting back into vehicle	62	55	56	45	43	60
Bought food/drink to eat in the vehicle	21	25	29	31	32	20
Bought convenience items from a shop/newsagent	13	9	8	12	11	17
Went for a stroll/let kids run round/walked the dog	8	3	3	4	4	10
Bought grocery/food shopping for after the journey	4	3	4	3	3	4
Charged electric vehicle	5	6	3	1	0	2
Didn't buy anything, just sat down for a rest, to have own food/drink	3	2	1	4	4	4
Bought fuel there	3	4	6	6	5	1

Experience with MSA and its facilities

General opinion of MSAs (1)

Ratings for cleanliness, ventilation, and range of facilities are mostly good (80%+ for all MSAs)

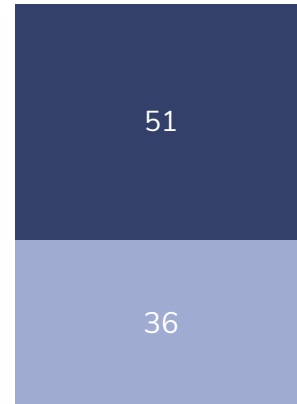
Slightly lower ratings in comparison for outdoor seating



Cleanliness

Total good (%)

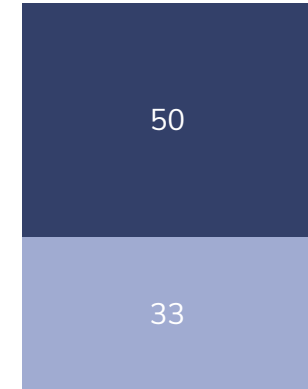
86



Ventilation

Total good (%)

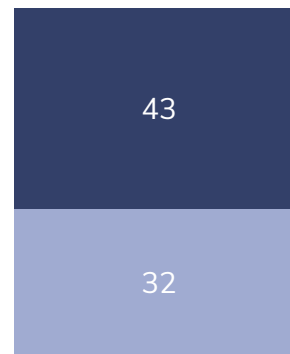
83



Outdoor seating

Total good (%)

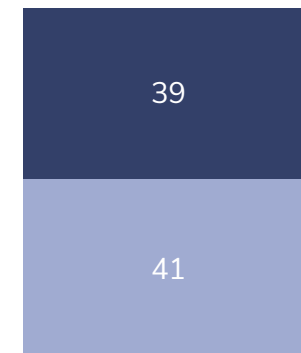
75



Range of facilities

Total good (%)

80



Very good Fairly good

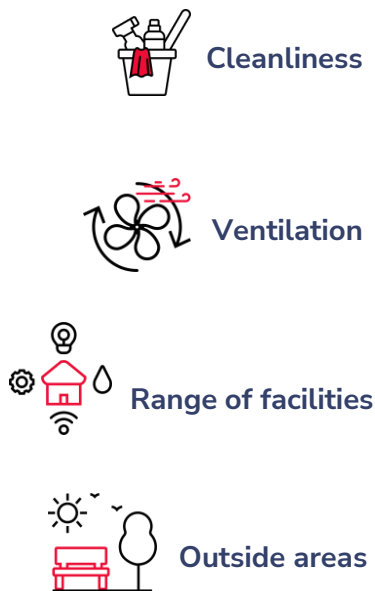
General opinion of MSAs (2)

By visitor type

Ratings across driver types are very similar

Slightly lower ratings from Professional and HGV drivers for range of facilities

Total good (%)



All MSAs



Leisure



Business



Commuter



Professional



HGV drivers



Disabled visitors

	Leisure	Business	Commuter	Professional	HGV drivers	Disabled visitors
86	86	87	89	87	87	84
83	83	83	87	85	84	82
80	81	80	83	76	76	79
75	75	73	75	78	78	72

Experience of the toilets (1)

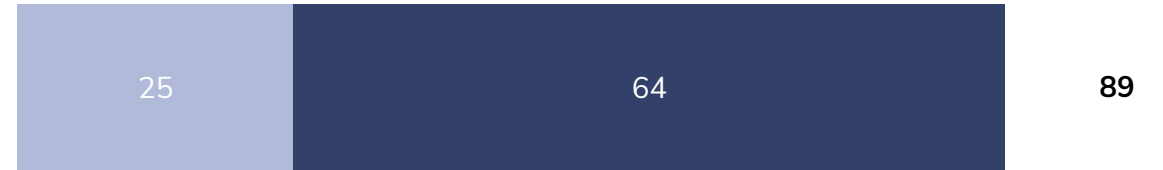
The number of toilets available and cleanliness are more highly rated than the quality of the fixtures



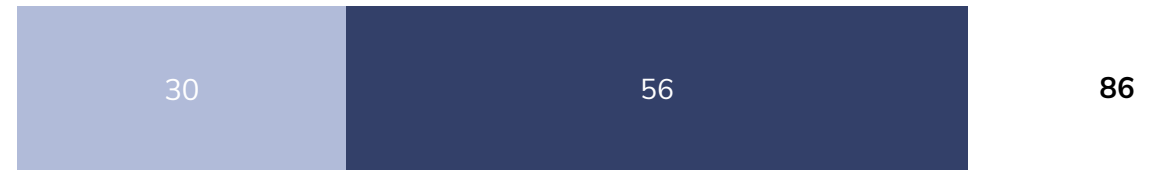
The number of toilets available

Fairly good Very good

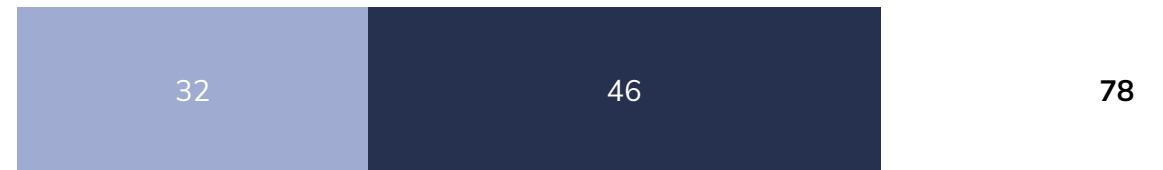
Total good (%)



How clean the toilet facilities were



The quality of the fixtures/fittings/dec or in the toilet area



Experience of the toilets (2)

By visitor type

Professional and HGV drivers give lower ratings for the number of toilets available but otherwise ratings are similar by driver type



The number of toilets available



How clean the toilet facilities were



The quality of the fixtures/fittings/dec or in the toilet area

Total good (%)



Leisure



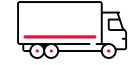
Business



Commuter



Professional



HGV drivers



Disabled visitors

Total good (%)	Leisure	Business	Commuter	Professional	HGV drivers	Disabled visitors
89	90	87	94	85	83	82
86	86	82	89	85	84	84
78	77	74	80	78	78	73

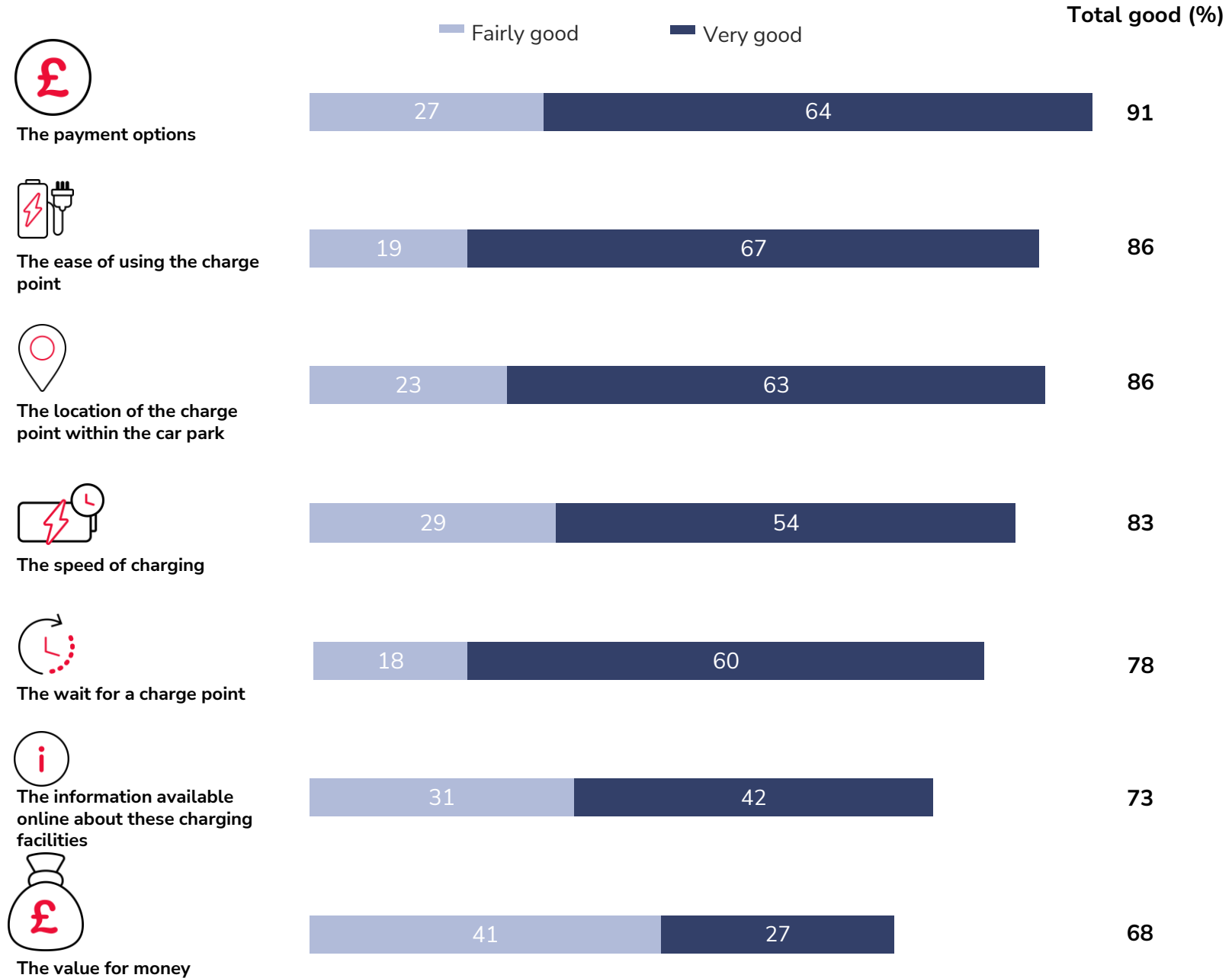
Experience with electric vehicle charging facilities

A small minority use the charging facilities at the services

High ratings are given for payment options, ease of use, location of charge point and the speed of charging

The information available online about charging facilities and more so value for money receive notably lower ratings

Charging your electric vehicle

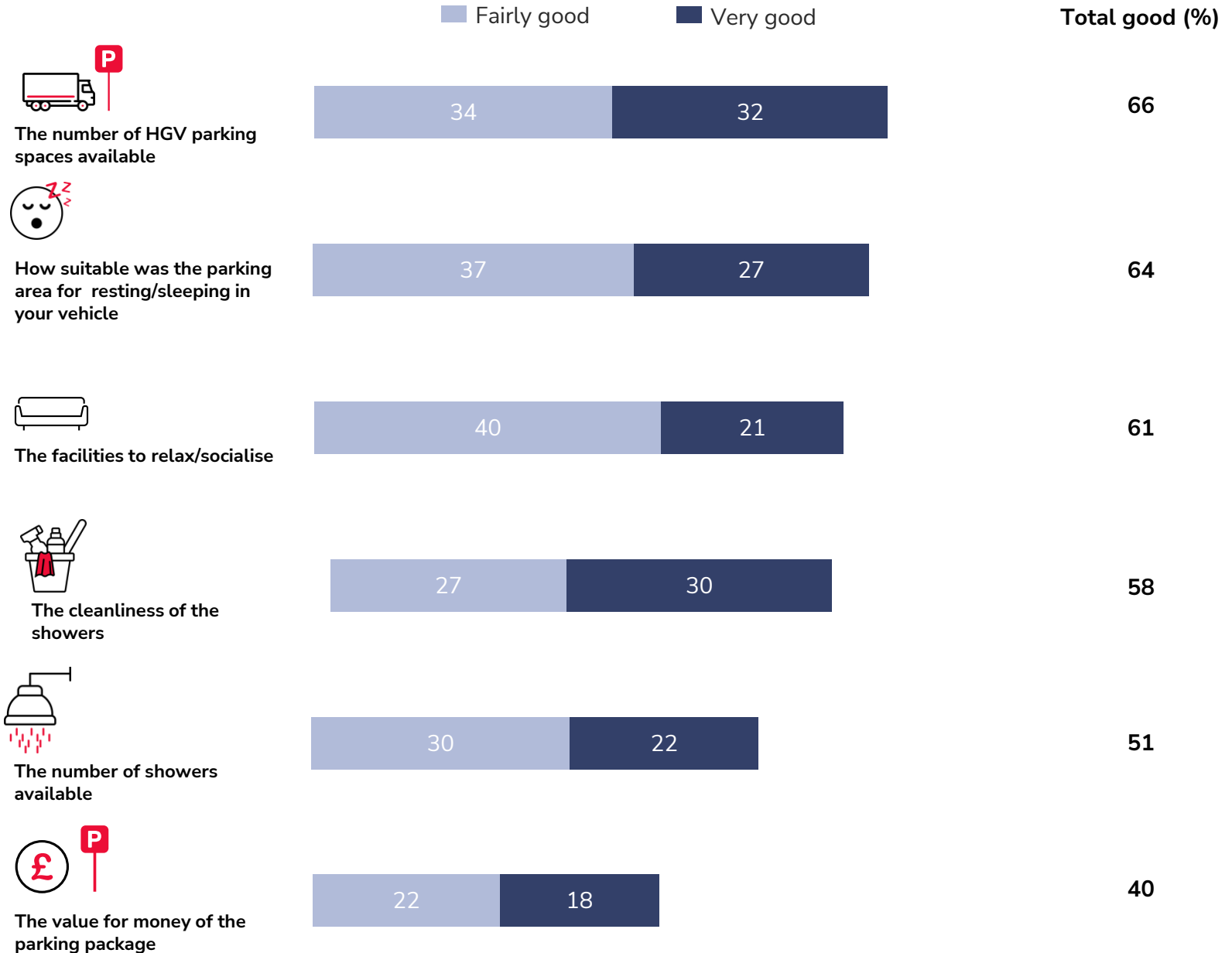


Experience using HGV facilities

Among HGV drivers, the highest rating is for the number of spaces that are available at the MSA and the suitability of the parking areas for resting / sleeping

Lower ratings are for the number of showers available and the perception of value for money for the parking packages

The facilities for HGV Drivers



Overall experience for disabled visitors at MSAs

Operator comparison

Despite having a similar level of satisfaction to other visitors, 38% of disabled visitors don't feel MSAs cater well for their impairment

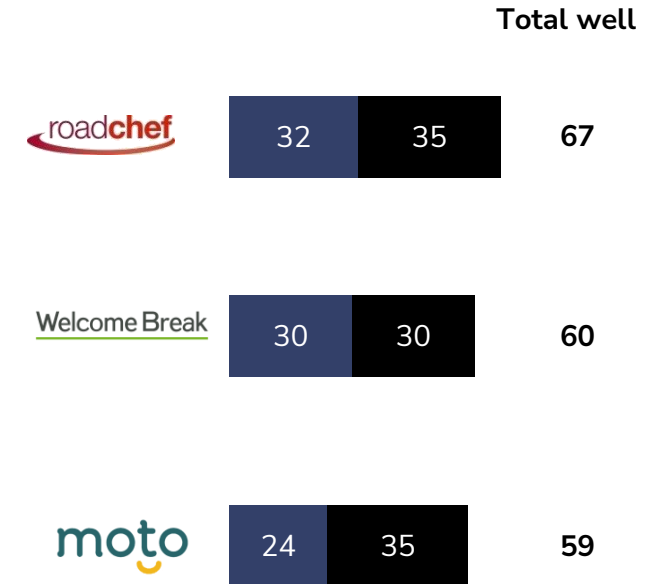
The best performing MSA operator for disabled visitors is Roadchef

How well do you think MSA services catered for your impairment(s)



34% Very well
 28% Quite well
 22% Neither well nor poorly
 11% Quite poorly
 5% Very poorly

How well catered for impairment(s) across operators (%)



Experience with food and drink facilities at MSA

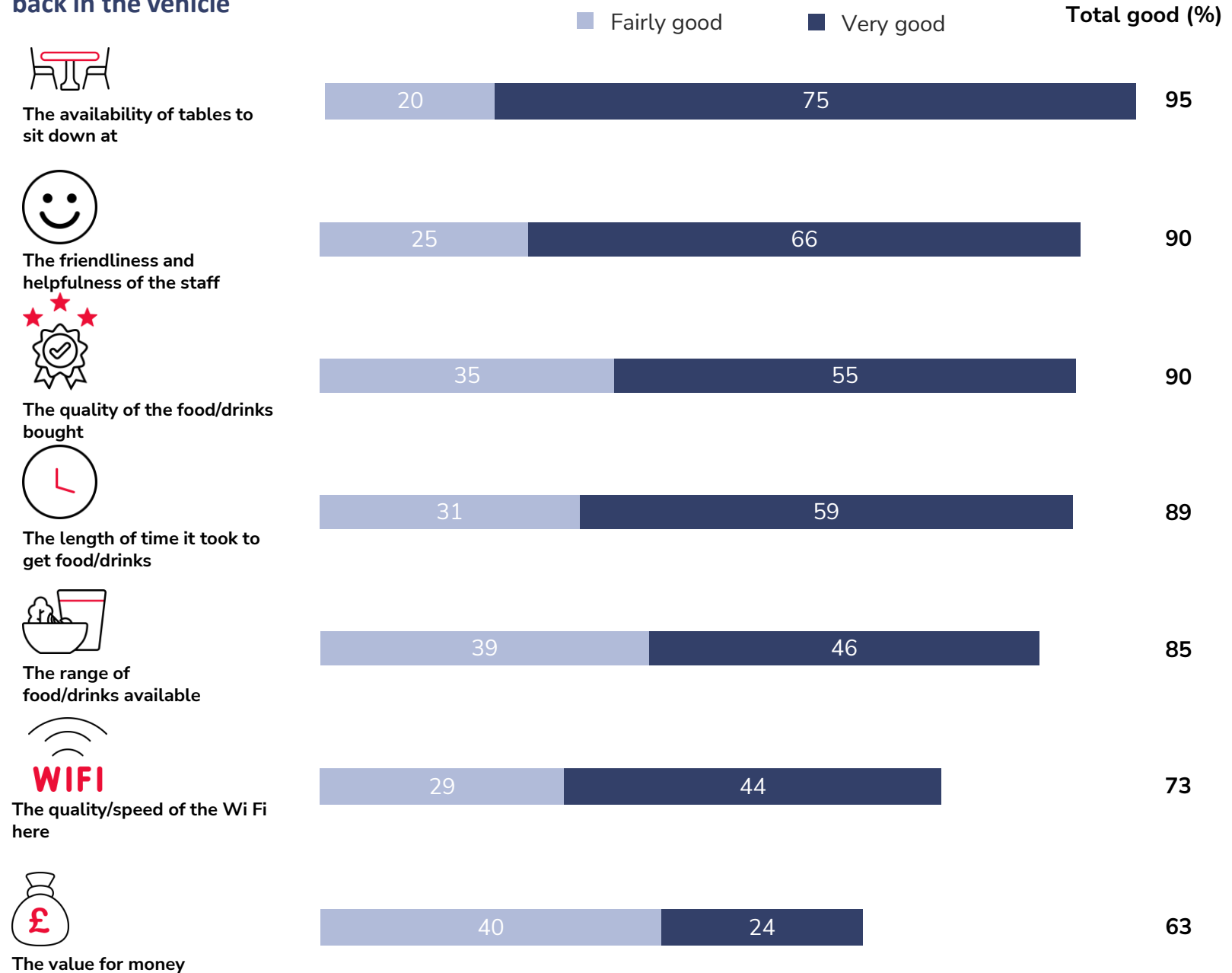
Food and drink bought to have in MSA (1)

Top ratings for the availability of tables at the food and drink outlets

High ratings also for the friendliness and helpfulness of the staff with two-thirds rating very good, quality of the food and drinks and the time it took to get them

Ratings for value for money are again at the bottom

The food/drinks you bought to eat before getting back in the vehicle
















Food and drink bought to have in MSA (2)

By visitor type

Ratings are generally similar across visitor types

Professionals and HGV drivers give higher ratings for the quality of the Wi Fi but lower ratings for value for money

The food/drinks you bought to eat before getting back in the vehicle

	Total good (%)	 Leisure	 Business	 Commuter	 Professional	 HGV drivers	 Disabled visitors
 The availability of tables to sit down at	95	94	97	96	96	95	96
 The friendliness and helpfulness of the staff	90	90	91	92	93	94	90
 The quality of the food/drinks bought	90	90	88	94	88	86	91
 The length of time it took to get food/drinks	89	88	93	92	92	93	87
 The range of food/drinks available	85	86	83	83	85	84	86
 The quality/speed of the Wi Fi here	73	72	71	69	79	79	73
 The value for money	64	65	64	63	55	52	67

Food and drink to have in the car (1)

Among those who bought food and drink to have in their vehicles, again the ratings are top for the friendliness / helpfulness of the staff, time it took to get the food / drinks, and the quality of the food / drink

Similar to those who ate in, the perception of value for money is lower

The food/drinks to have in the vehicle or shortly after



The friendliness and helpfulness of the staff



The length of time it took to get food/drinks



The quality of the food/drinks bought



The range of food/drinks available

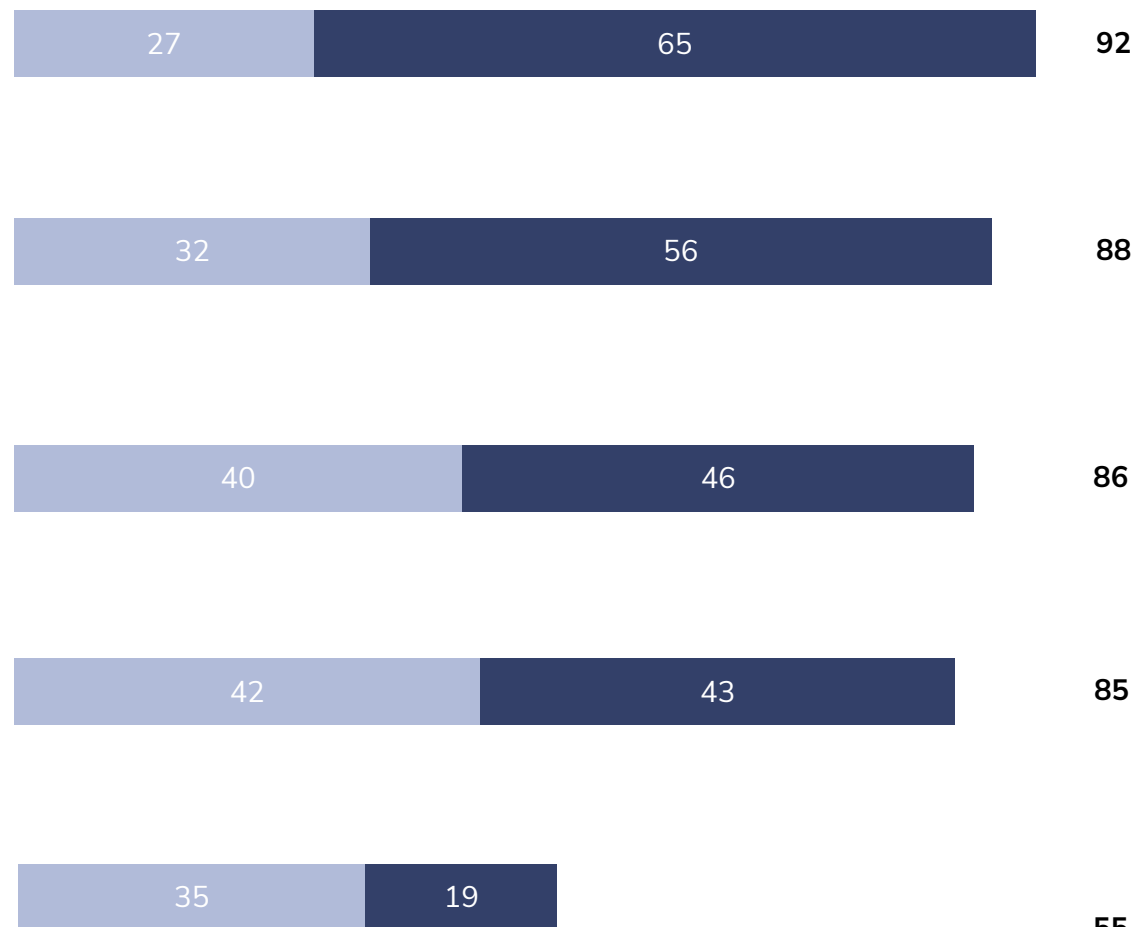


The value for money

Fairly good

Very good

Total good (%)



Food and drink to have in the car (2)







By visitor type

Here, too, ratings by visitor type are similar

Exceptions are the range and quality of food and drinks where ratings from Professional, HGV but also Disabled drivers are somewhat lower

The food/drinks to have in the vehicle or shortly after

	Total good (%)
 The friendliness and helpfulness of the staff	92
 The length of time it took to get food/drinks	88
 The quality of the food/drinks bought	86
 The range of food/drinks available	85
 The value for money	55

	 Leisure	 Business	 Commuter	 Professional	 HGV drivers	 Disabled visitors
The friendliness and helpfulness of the staff	91	95	89	91	92	84
The length of time it took to get food/drinks	86	90	95	90	91	84
The quality of the food/drinks bought	86	95	88	80	80	78
The range of food/drinks available	85	87	85	81	81	80
The value for money	55	55	54	54	52	58

Experience with sitting down/consuming own food at MSA

Very few used the MSAs to consume their own food or drinks

The highest rating is for cleanliness of the tables / seating areas

Sitting down for a rest or to have your own food/drinks

Fairly good Very good

Total good (%)



How clean the tables/area was kept



87



The amount of seating available



81



How pleasant the rest/eating area was



78



WIFI
The quality/speed of the Wi Fi here



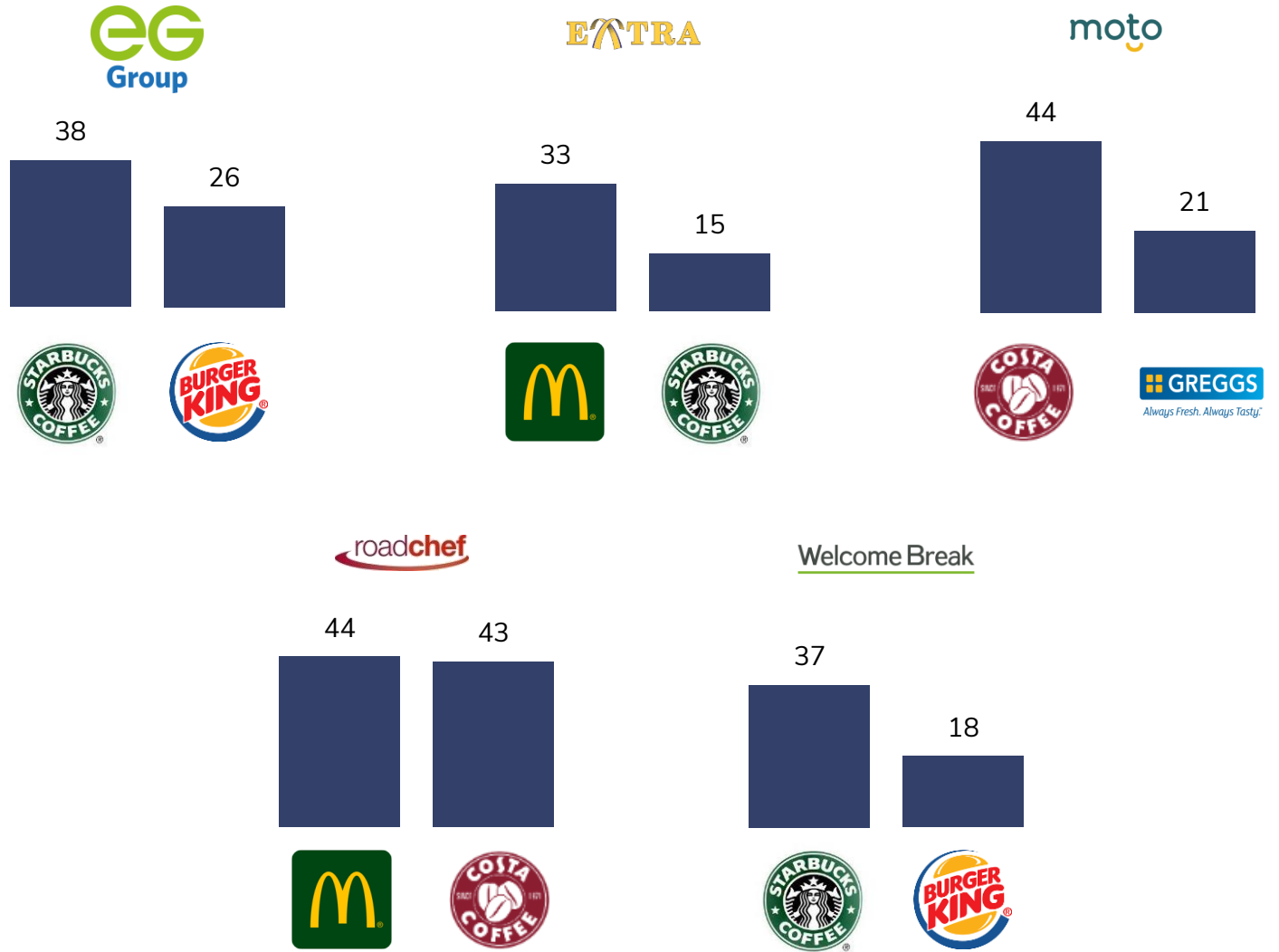
75

Brands bought food and drink from - to eat in MSA

Top brands across operators

While coffee chains are the most popular in most MSAs, where McDonalds is available, it tends to be the most used in our sample for people who eat in

Top two brands (%)

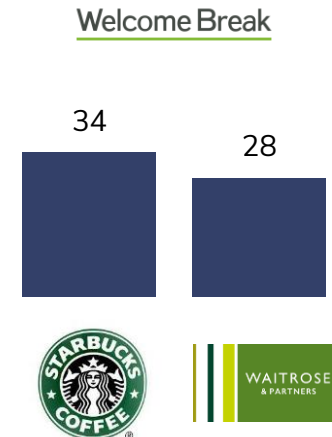


Brands bought food and drink from - to take away

Top brands across operators

For take away, again the coffee chains are more popular than the food outlets except for Extra where McDonalds is more popular

Top two brands (%)



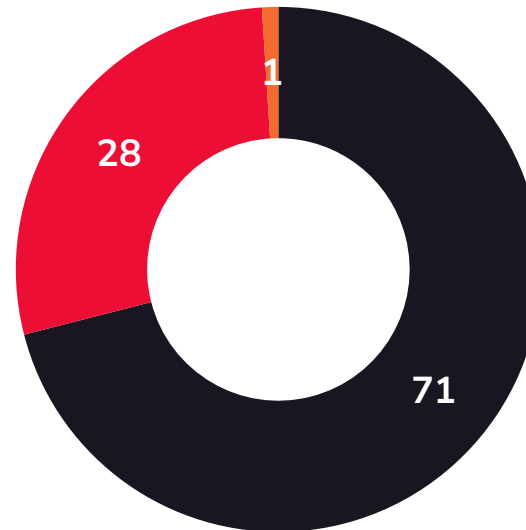
Food/drink order method

For eat-in and take away

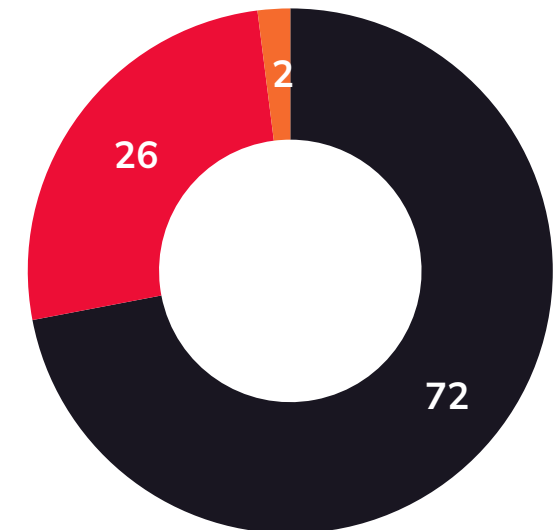
Across all brands, the majority of visitors to MSAs order through the counter / till point when ordering food or drinks, to eat in (71%) and to eat out/ take away (72%)

Self serve is used by just under three in ten for those who order to eat in the MSA (28%) and around a quarter use this method when ordering food to take away (26%)

Food/drink to eat in MSA (% by each method)



Food/drink to take away (% by each method)



■ The counter/ at a till

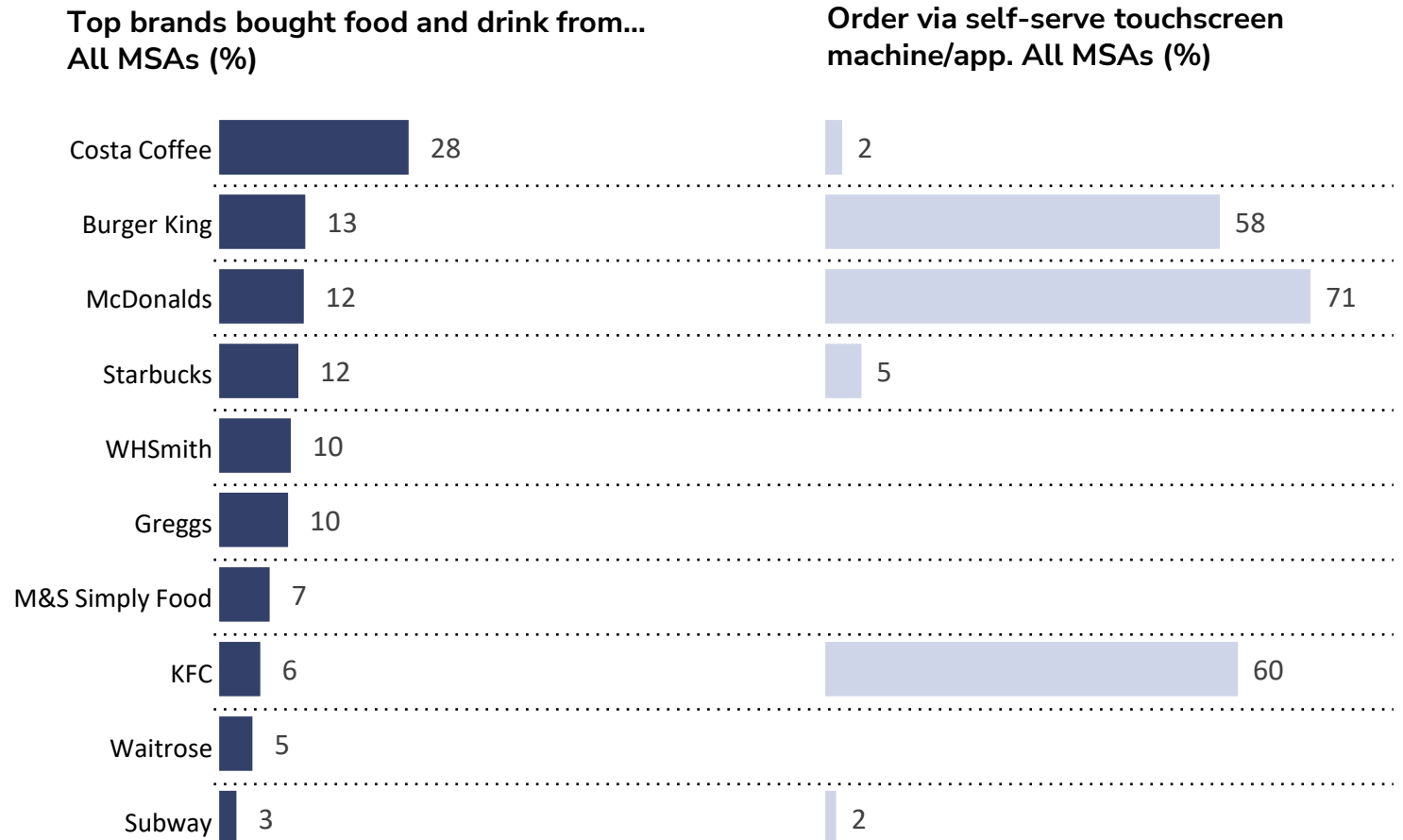
■ A self-serve touchscreen machine

■ Using an app

Food/drink purchase behaviour (eat-in and take away)

Across all operators, in the three largest fast food chains (Burger King, McDonalds and KFC), visitors generally prefer to order via self-serve touchscreen machine rather than at the counter / till

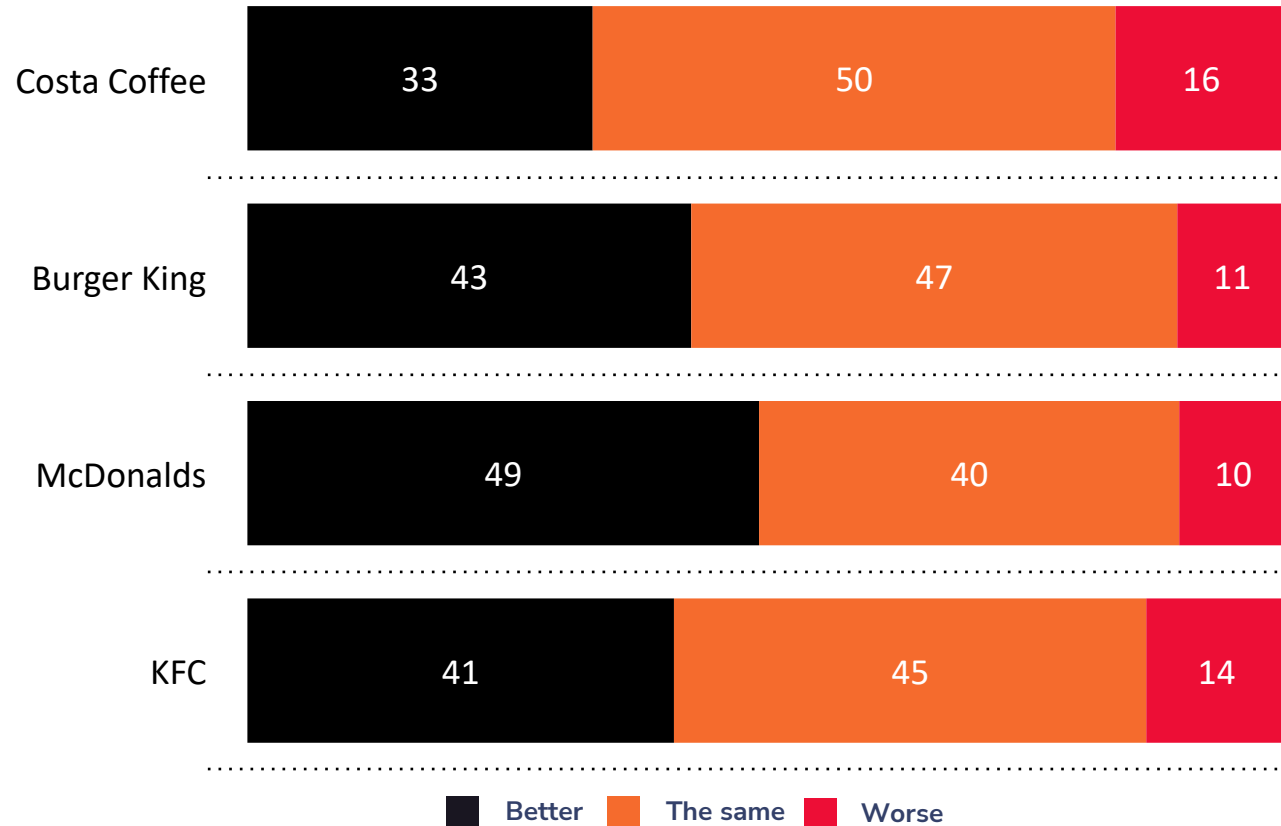
For the coffee chains very few ordered using self-service options



Experience ordering from touchscreen machine or app

For those who used the self-serve touchscreen machine or the app, they generally think the experience is the same or better than ordering at the counter across all brands

Experience ordering from a self-serve touchscreen machine/app on the premises (%)

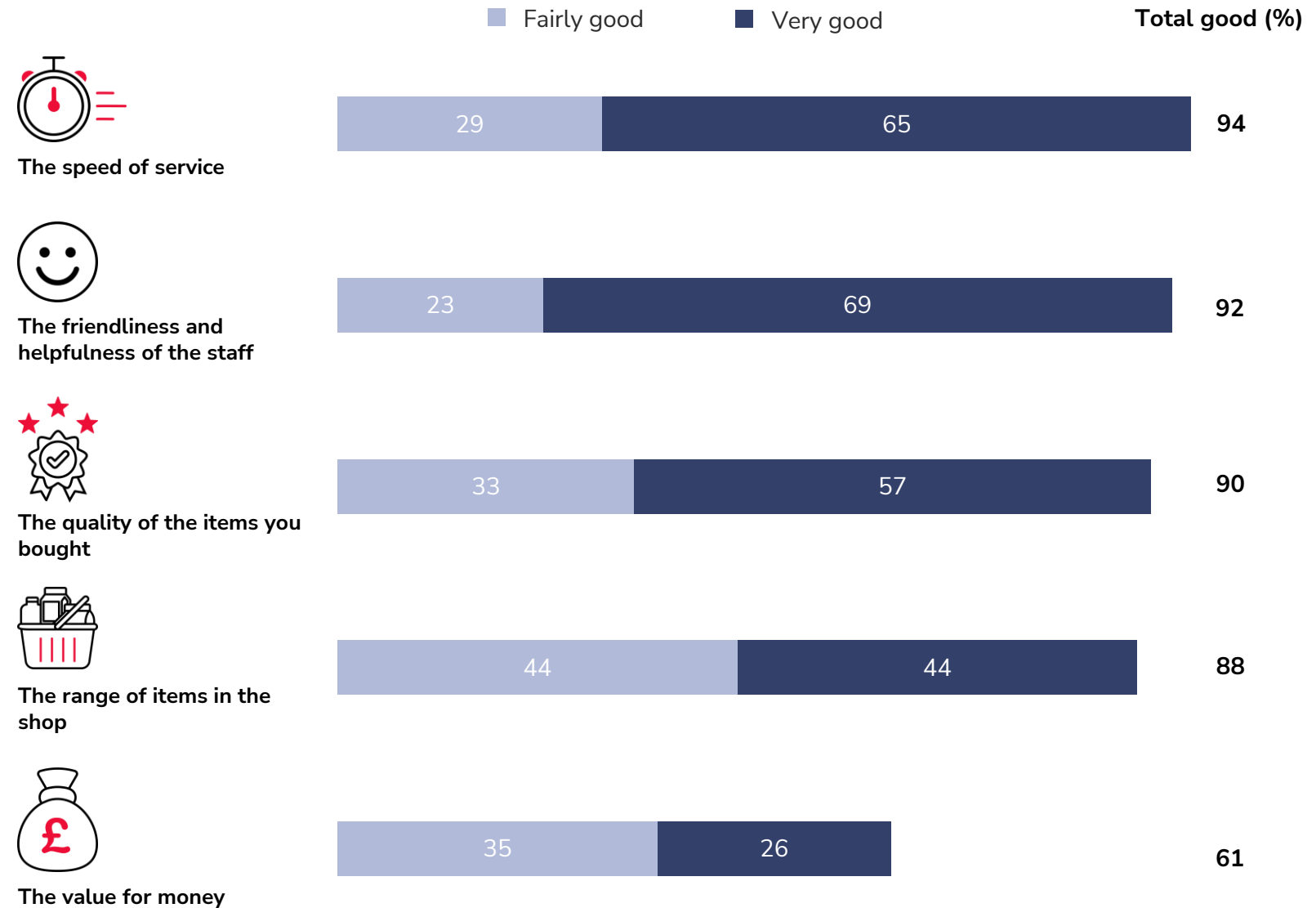


Attitudes towards buying convenience items

Within the shops / newsagents, 90%+ rate the range of items, quality of items, speed of service, and friendliness / helpfulness of staff as fairly or very good

As with other areas, the perceptions of value for money are lower, but the majority find it good

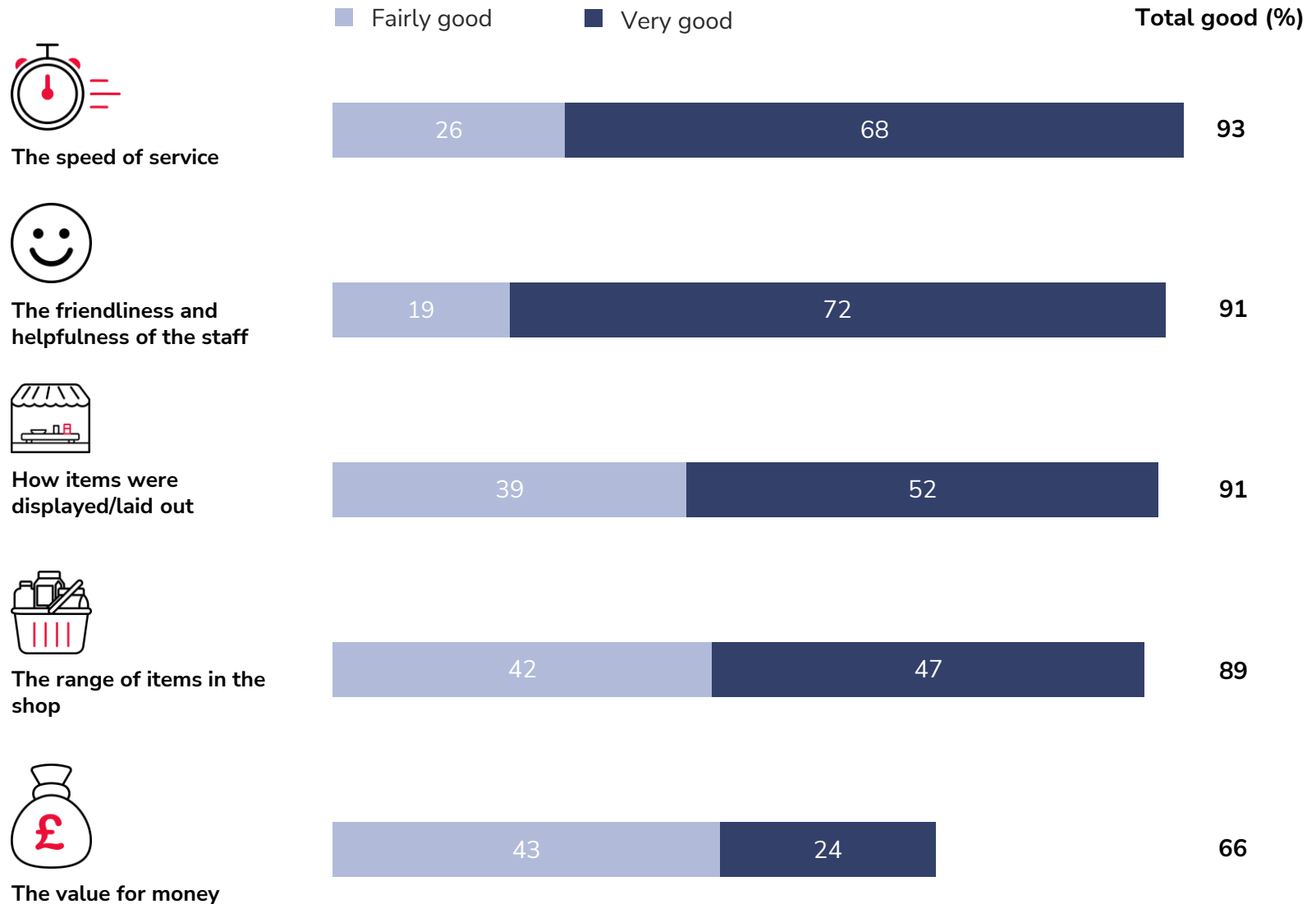
Buying convenience items from a shop/newsagent



Attitudes towards food/grocery shopping

Value for money for food / grocery is deemed slightly better than for convenience purchases (previous slide)

Buying your food/grocery shopping (i.e. for after your journey)



Mood on arrival and exit

Changes in mood (1)

Mood on arrival and exit

Among all MSA visitors, nearly a third (31%) arrive at outlets with a negative mood, e.g. either tired, stressed or frustrated

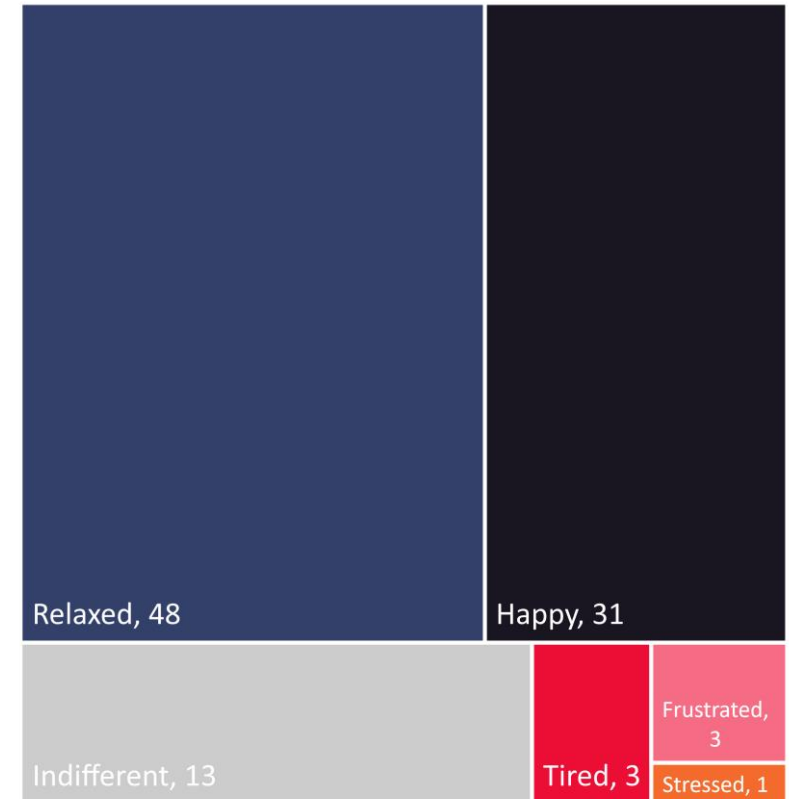
After leaving, this negativity falls to just 7% demonstrating that the experience is having a positive impact on drivers

While some remain 'indifferent' after leaving the services, 79% report being either 'relaxed' or 'happy' as they leave

Mood on arrival (%)







Mood on exit (%)



Changes in mood (2)

With operator comparisons

Among all operators, the positive impact (either increase in happiness / relaxation or decrease in tired / stressed / frustrated) is about the same

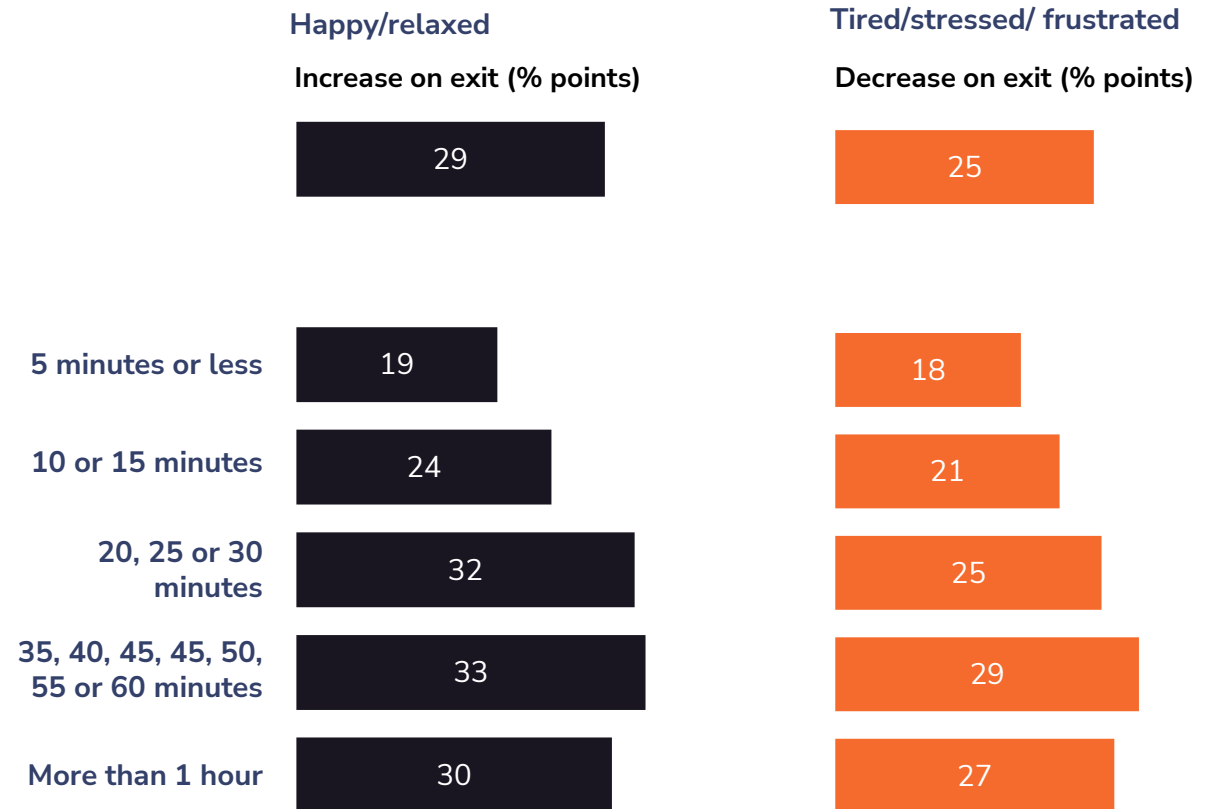
  Increase in happy/relaxed upon leaving MSA
  Decrease in tired/stressed/ frustrated upon leaving MSA



Mood of visitors on arrival and departure

By time spent at MSA

A notable increase in visitor mood is seen when visitors stay for at least 20 minutes at the services, generally peaking at half an hour to an hour

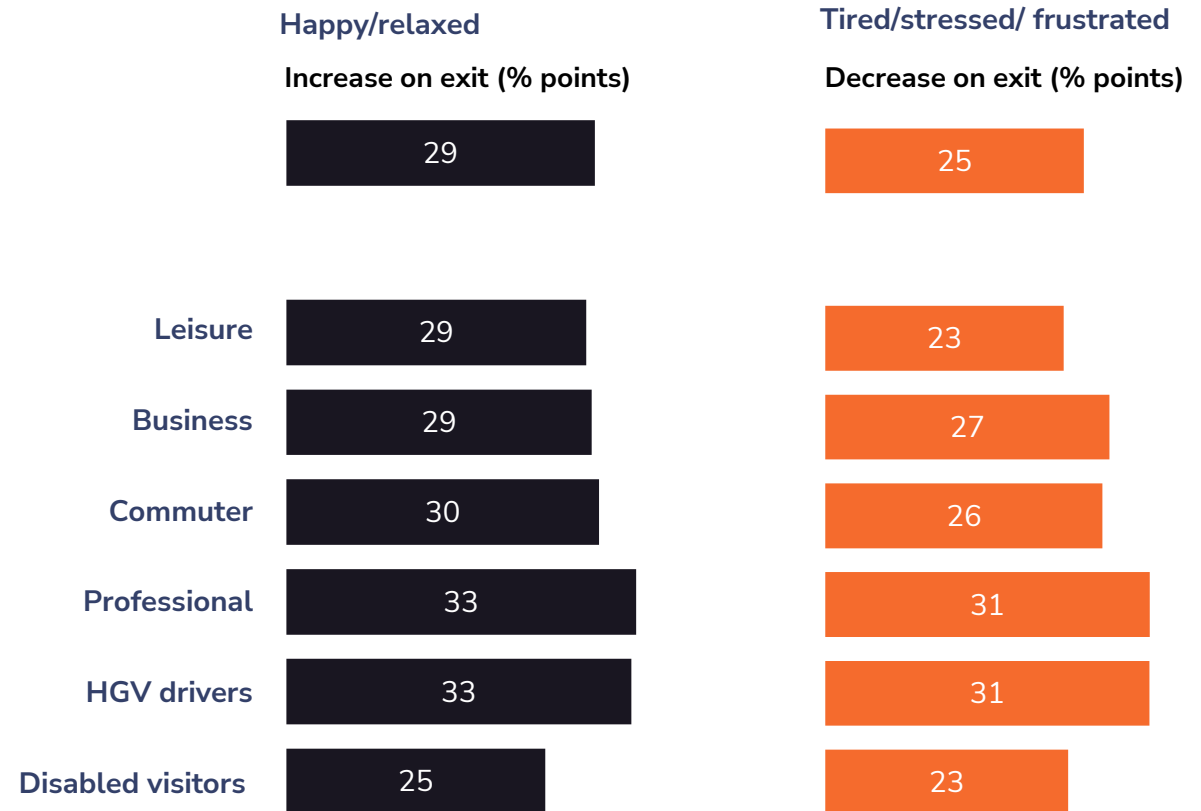


Q2. Tell us, when you got to [MSA], which of these below best described your mood? Q20. And, when you left [MSA] which of these below best described your mood? **Calculating the difference from arrival to exit** All MSA visitors: 5,566; Less than 5 mins: 456; 10-15 mins: 1,292; 20-30 mins: 2,295; 35-60 mins: 1,183; More than 1 hour: 340

Mood of visitors on arrival and departure

By visitor type

Professional and HGV drivers are more likely to leave the MSA happy or relaxed



EPIC experiences and improvements

Findings from the detailed experience survey



Introducing the EPIC framework

Creating an emotional connection with visitors is difficult, but behavioural sciences can maximise chances of success

People judge an experience based on how they felt at its peaks (i.e. its most intense points), rather than based on the total sum or average of every moment of the experience.

So how do we find out what the peak moments are for your visitors so we can measure the performance of MSAs?

We do this by asking MSA visitors to record whether they felt: Elevation (the experience went beyond what was expected), Pride (they were made to feel unique), Insight (they learnt something) or Connection (a bond was formed)

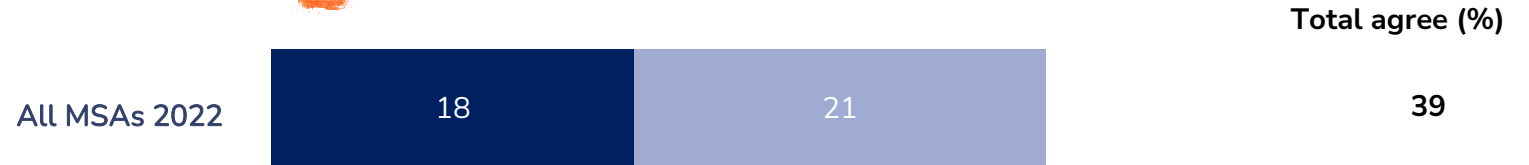


EPIC experiences

The highest "EPIC Experiences" visitors received at MSAs are linked to Pride and Connection.

Scoring slightly lower are the feeling that service levels went above and beyond and that helpful advice was provided

Elevation (went above and beyond the usual level of service)



Pride (made you feel valued)



Insight (provided you with helpful advice)



Connection (took care to fully understood your needs)



■ Strongly agree

■ Slightly agree

EPIC experiences and link to likelihood to recommend

The impact of having experienced any of the EPIC pillars results in uplifts of 64+ NPS points compared to those who didn't

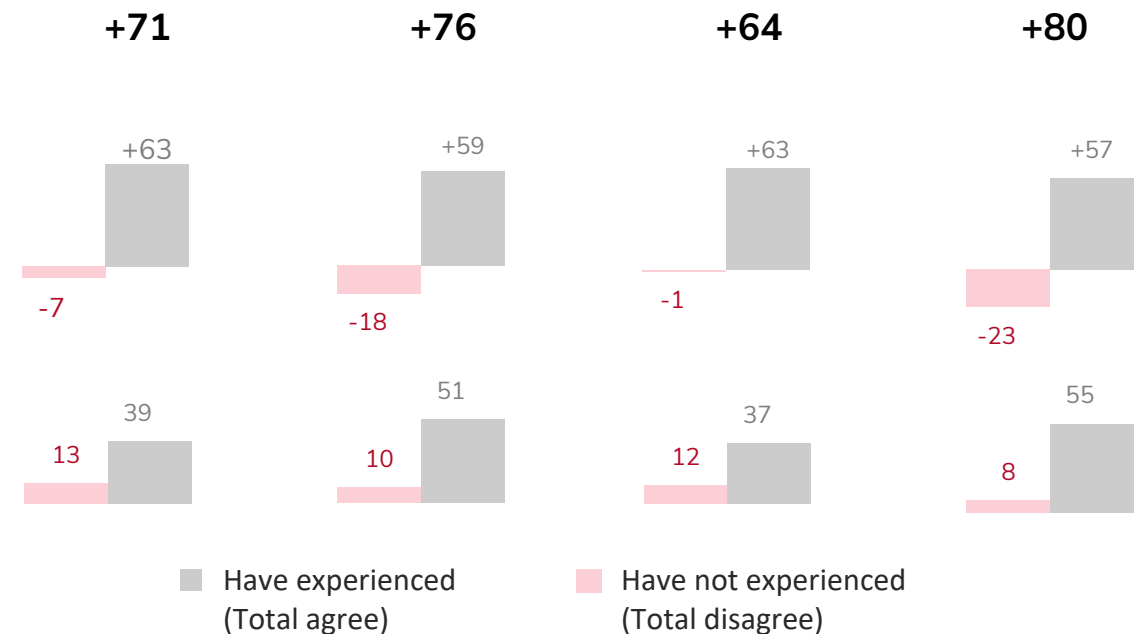
The impact of having an "elevation" or "insight" experience results in the highest NPS

Elevation Pride Insight Connection

NPS uplift between those who experienced vs. those who didn't

NPS for those who experienced vs. those who didn't

Share of visitors who experienced vs. those who didn't



EPIC experiences

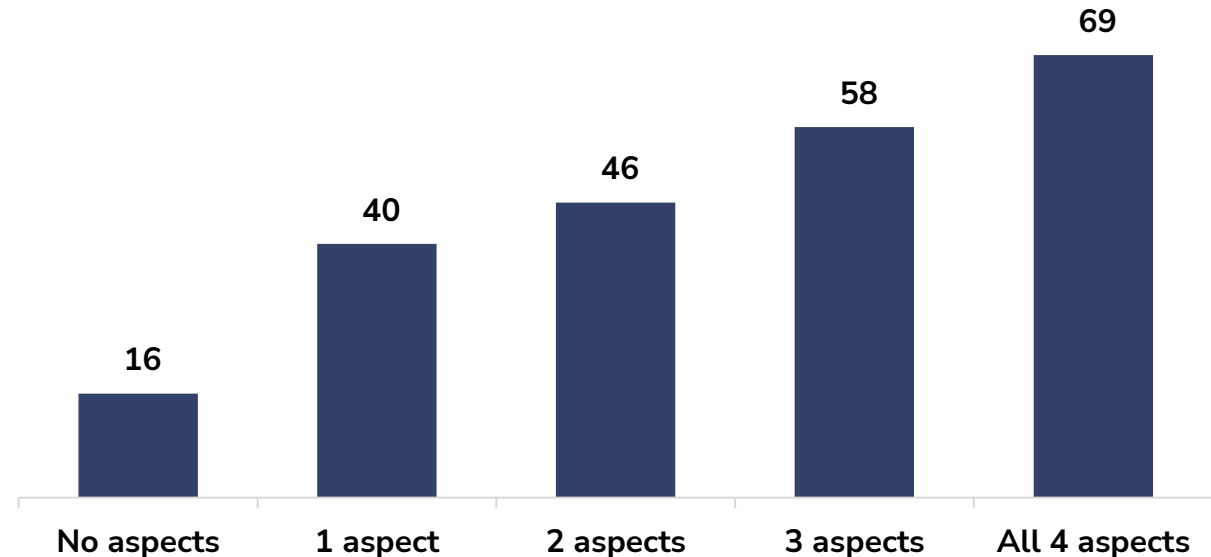
Delivering the right amount of EPIC aspects

Currently, 43% of MSA users are not getting any EPIC aspect when visiting an MSA

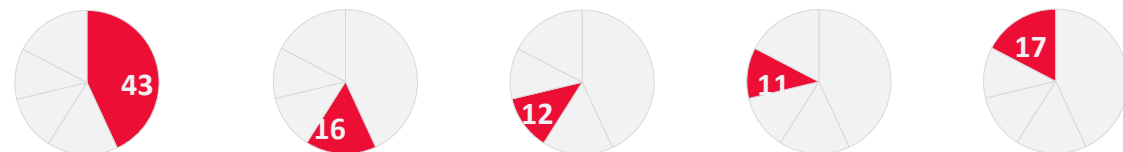
The number of EPIC experiences that visitors have increases their NPS substantially

17 per cent experienced all four EPIC aspects – for this group the NPS score was 69

Average NPS score by the number of EPIC aspects visitors agreed they experienced



% of visitors experiencing these number of EPIC aspects



EPIC experiences

EPIC experiences and recommendation

Most of the EPIC experiences are delivered via the staff in the services, e.g. friendliness, helpfulness, and proactivity



Elevation

Pride

Insight

Connection

- | | | | |
|---|---|--|---|
| <ul style="list-style-type: none"> ▶ “Told me to sit down and would bring drinks over even though not waitress service”
Rivington Northbound ▶ “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.”
Norton Canes ▶ “The staff were very friendly and made me feel welcome. Felt like I could stay as long as needed with no rush.”
Woodall Southbound ▶ “My wife is disabled and they were very caring”
Chester | <ul style="list-style-type: none"> ▶ “I'm here regularly and the staff recognise me and always ask how I am and how my day had been”
London Gateway ▶ “Gentleman in WHSmiths asked if I wanted a bag and I said no. He actually tucked my greetings card in my magazine so I wouldn't lose them...which was very thoughtful”
Durham ▶ “They took time to understand what I can eat even when busy, as I have an allergy.”
Rugby | <ul style="list-style-type: none"> ▶ “Directed to and instructed in use of self service tills.”
Wetherby ▶ “Went through the menu with me”
Baldock ▶ “At Costa Coffee they explained how I would benefit from a Costa App to get free drinks when using my reusable cup.”
Rugby ▶ “Staff advised me how far Manchester was from here”
Keele Northbound | <ul style="list-style-type: none"> ▶ “I was struggling using the app and the touch screen so they were patient with me.”
Exeter ▶ “Politely asked what I required. Asked if I needed anything further for my onward journey.”
Birch Eastbound ▶ “Lovely staff, chatty, friendly”
Maidstone ▶ “Got us a high chair for toddler without us asking”
Cobham |
|---|---|--|---|

MSA reducing environmental impact

Whether noticed something to reduce MSA's impact on environment

16% across all operators noticed efforts to reduce environmental impact at MSAs

Visitors to Roadchef are most likely to notice something (21%), while visitors to Moto are least likely (13%)



What action(s) noticed

"There was a plastic bottle recycling machine, unfortunately I hadn't finished my drink at that point!" - Clacket Lane Westbound

"Surrounded by numerous trees. Plenty of rubbish bins. Outside tables cleaned" – Southwaite Northbound

"Electric charge points for vehicles" - Exeter

"Good number of EV charging points" – Heston Westbound

"Lots of bins and wooden seats outside fitted with countryside setting" - Abington

"Waterless urinals and low power hand dryers" – Birch Westbound

"They have now electric power points, but I would like to see more recycling of plastic, glass etc - Pease Pottage

Improvements

What users would change about the MSA

Suggestions for improvement include the car parking facilities, the charging points (and related information), the toilets, seating, and some complaints specific to brands

Car park

Signs entering car park were a bit confusing and had to go round again - Peterborough

More HGV parking places as most days I cannot find a parking space- Sandbach Southbound

Make signing clear as to where charge points are for electrical vehicles - Toddington Northbound

Parking should be 3 hours; 2 is not enough time to have a little nap and something to eat - Reading Eastbound

Facilities

More cleaning of the toilet area and emptying of the overflowing hand tissue bins – Warwick Southbound

The toilet area looked tired and there were a few broken taps. The toilet cubicle I was in had no paper and the door lock had been replaced with something that was not suited for the purpose. - Birch Eastbound

The water in the taps was too hot in the toilets and toilet paper should be available even at busy times - Magor

Outdoor seating

Better outdoor picnic options (dotted around for privacy) – Bothwell

Make seating area outside a bit nicer. I would like nice tables and chairs rather than picnic benches - Tamworth

Customer service

Have more staff serving you so waiting time not so long - Hartshead Moor Westbound

Cleanliness; the Burger King facilities are very dirty; no ventilation and more staffs is needed – Lancaster Southbound

Brands

Reduce the price of food and more variety of food places to eat from - Medway Eastbound

Add more choice for fresh food not all franchises - Abington

Additional demographic data

Findings from the detailed
experience survey



Respondent profile of the detailed experience section

Findings from detailed experience survey



Leisure



Business



Commuter



Professional



HGV drivers

Visitor type	68	13	4	15	13
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Gender (%)

Male

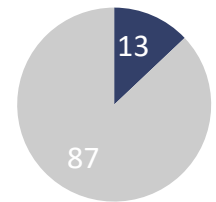
58

Female

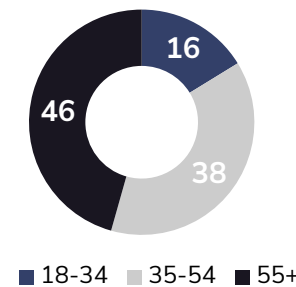
41

Disabled (%)

■ yes
■ no



Age (%)



Type of impairment (%)



Type of impairment	Percentage
Mobility	67
Sensory	12
Cognitive	20
Other	12

Base size is all answered each question: Visitor type 5566; Gender 5557; Age 5548; Disabled 4702; Type of impairment: 602.

Vehicle used when visiting the MSA

Most visitors are travelling in diesel or petrol cars. 5% are in electric vehicles with another 6% in hybrid vehicles. Many of the electric vehicles are needing the recharging facilities at the MSAs



All MSAs average

Vehicle type (%)

Car	76
LCV	5
HGV	14
Coach/Minibus	3
Motorbike	1
All others	1

Fuel type (%)

Petrol	39
Diesel	47
Hybrid*	6
Electric	5
Other	0

Appendix



Contacts



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Quality/accreditation (ISO, etc)



We are ISO 20252:2012 and ISO 27001:2013 certified, the recognised international quality standards for market research and information security.

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

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

Quality standards and other details

BVA BDRC is certified to ISO 20252 and 27001, the recognised international quality standards for market research and information security, thus the project has been carried out in accordance with these standards.

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

Full methodological details relevant to the project, are available upon request.